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Terms and Concepts

This glossary is designed to act as a reference guide to help familiarize users with the language used at ASI and within iMIS. Users will be able to search through these terms and concepts alphabetically, without needing to navigate away from the page, or by using the Helpsite Search feature.

A-C

Access keywords

Keywords defined in the ACCESS_KEYWORDS general lookup table that control access to particular iMIS components.

Accounting

The systematic recording, reporting, and analysis of the financial transactions of an organization.

Accounting date

The date assigned to the journal entry (or journal entries) related to the upfront recording and posting of a commerce transaction or to subsequent processing of the commerce transaction related to the change in accounting status. The accounting date should always align with the invoice date for an accrual standard invoice or an accrual adjusting invoice. For a payment, the payment deposit date should be used to record the cash receipts journal entry.

Accounting period

A regular period of time for which a financial statement is produced.

Accounting policy

A systematic routine that determines how the financial transactions of an organization are recorded and reported, such as how income (whether earned or a gift) is received and recognized, how expenses are authorized and paid, and how assets and liabilities are presented on the organization’s financial statements.

Accounts receivable (AR)

Money owed to an organization by customers who have bought goods or services on credit (when income is recorded on the accrual accounting basis). Accounts receivables are current assets that continually turn into cash as customers pay their bills.

Designates the class of accounts that represent the total, cumulative debt owed to you by customers who purchased goods and services on credit.

Accrual basis

The accounting method that recognizes income at the time of sale (when goods are shipped/invoiced or services rendered) and expenses at the time they are incurred, independent of when they are paid for. This method focuses on events that have cash consequences for the organization.

Acknowledgement

A letter or other written notification sent to a donor to inform the donor that a gift or pledge has been received. iMIS allows for acknowledgements to be customized by salutation, body of letter, and sender.

Active contact

In the Administrative Console or Desktop, this is the member whose record is selected.

Active member

An association member whose dues and membership are up-to-date.

Activity

A record, in iMIS, of a predefined type of interaction with a customer. For example, a cash donation generates a GIFT activity, conference attendance generates a MEETING activity, a solicitation generates a REQUEST activity.

Adjusting invoice

Invoice that is cross-referenced to a standard invoice for the purposes of increasing or decreasing product charges and/or reducing the open balance of the invoice.

Adjustment transaction

A commerce transaction (or a part of a commerce transaction) that impacts the current status of an original posted transaction.

Administrative Console

One of the Core Sites of iMIS that contains staff functions not yet available on the Staff site.

; A streamlined, easy-to-use interface alternative for customer service and staff functions. Its functionality allows an administrator to define and set up iMIS. Its utilities are installed directly on your machine and are moderated from one central location.

Aging

The length of time an amount is past due for payment on an invoice.

Alias (IQA)

An alternate name for a column (property).

Anniversary billing

Used when the membership terms fluctuate; usually corresponds to each customer's Join Month or subscription Begin Month.

Announcements

Items posted for information only. Announcements typically allow no replies.

Annual billing

Used when all renewing customers have the same Begin and End dates. The Begin Date could vary for new customers who join later in the year, and their dues can be prorated for a partial term.

Annual conference mobile site

A version of the Annual Conference that is optimized behaviorally and formatted for use on smart phones and tablets for both by association members and staff who are attending

events. Attendees gain quick access to their personalized programs, activities, and event feeds. Attendees can instantly look up the directory profiles of others attending the conference.

Annual conference site

An out-of-the-box micro site, designed to support critical projects such as an association's annual conference. This site maximizes the impact of the project without affecting the main association site or micro sites from different years, while still seamlessly integrating content between the various sites.

Appeal

A short-term activity with a specific objective that is a specific instance of a request, such as a mailing or telemarketing event. Appeals are not required in iMIS Fundraising.

Application

A specialized computer program or software package that performs particular tasks. The iMIS Customer system is an application.

Application Service Provider (ASP)

Third-party entities that manage and distribute software-based services and solutions to customers across a wide area network from a central data center. ASPs can be commercial ventures that cater to customers, or not-for-profit or government organizations, providing service and support to end-users.

Apply

Allocating or charging to an account, product, activity, or period.

Asset

- A non-cash contribution that has monetary value, such as real estate, stocks, or an annuity. An asset differs from an in-kind contribution in that its longevity is generally greater than a year. An asset is treated the same as an in-kind contribution in iMIS.

- Economic resources that are owned or controlled by the organization. Both AR and cash accounts represent assets.
- Something valuable that a financial entity owns, benefits from, or has use of, in generating income. In accounting, an asset is something an entity has acquired or purchased, and which has money value (its cost, book value, market value, or residual value). An asset can be:
- Something physical, such as cash, machinery, inventory, land and buildings
- An enforceable claim against others, such as accounts receivable
- A right, such as copyright, patent, or trademark
- An assumption, such as goodwill

Attendance

The accounting of who was present at an event or function, as opposed to who signed up to attend (see Registration). Because of no-shows, attendance figures will be lower than registration numbers. Accurate attendance tracking is important for awarding continuing education units, so the Update Attendance facility lets you mark verified attendees (or unmark no-shows).

Audit trail

A reference accompanying an entry (posting) to an underlying source record, or a trail of documentary evidence proving that transactions are authorized. A good audit trail lets you efficiently check the accuracy of accounting entries.

Authenticated user

A user who has logged in.

Available

The product quantity on hand less the product quantity reserved.

Backorders

Backorders indicate that insufficient inventory is available to fill an order. Orders that cannot be filled are held in a backorder status until inventory is received.

Badge

A badge is a nametag that is given to each attendee to wear at the event. Badge formats usually feature the individual's nickname or first name (enlarged for readability) and include other identifying information such as full name, title, company, city, and state. Sometimes, each badge is marked with a color-coded strip to differentiate groups of attendees: customers, guests, exhibitors, speakers, and staff.

Balance

The sum of debit and credit entries in an account:

- If positive, it is a debit balance.
- If negative, it is a credit balance.

A balance sheet is a report showing the assets, liabilities, and owner's equity of a business on a certain date.

Batch

A group or collection of transactions of the same general type, identified by a unique name or number. The transactions might be batched together by date or by other parameters.

Bill Begin

Projected Begin Date for an individual dues or subscription product. Refers to the first date of a term through which the item has been billed, whether or not payment has been received.

Bill To

Refers to whoever is responsible for paying the registrant's event fees. This may be the registrant or, as in many cases, a third party such as the registrant's company or employer. When a Bill To party is identified, all accounting and invoice transactions are

tracked under the Bill To ID. However, all participation history continues to be tracked under the individual registrant's ID (if represented in the customer database).

Bill to contact

The party financially responsible to pay for an order. A single bill to contact is assigned to each order and to each invoice.

Billed thru

Refers to the projected Paid Thru date (expiration date) for an individual dues or subscription product. It is the term ending date through which the item has been billed, whether or not payment has been received.

Billing

The processing of renewable, specified-term products for a group.

Billing address

The address to which the invoice document should be sent. For online payments, the billing address of the credit card which is used for credit card verification.

Billing category

Optional subcategories of the customer type which define dues amounts when the customer type is not specific enough for an association's needs.

Billing cycle

A defined billing run set up to bill a particular group of people for a particular set of products.

Billing interval

Indicates how frequently customers are billed. The interval can be annual, semi-annual, quarterly, monthly, and so forth.

Billing term

The period of time between the beginning and ending dates for the services or products that are being billed.

Bin

A specific location where a product is stored within a warehouse.

Blog

Chronological listing of entries, often created by one individual.

Book

A set of pages tied together in a hierarchical parent-child relationship. Multiple levels can exist and these can be used for manuals, FAQs, or other content groupings.

Booth inventory

Total number of items that have been generated for a particular booth product. For example, the total number of 10' x 10's would be the booth inventory for that product.

Booth preference management

Strategy for selling booths where preferences are assigned to exhibitors based on priority points or a ranking system other than the first-come-first-served method. This is typically used by organizations that use the lottery method of assigning booths. With booth preferences, exhibitors can select their first, second, and third choices for booths and are assigned preferences based upon specific criteria, such as how long they have been exhibiting and the amount of space they purchase.

Breadcrumb

Text showing the sitemap of a visited page that appears automatically on every site. These navigation areas must be enabled globally in the website’s sitemap.

Business object

A collection of self-contained data that represents an entity or process, and shields the physical data.

Business object designer

An administrative tool for viewing, editing, and creating iMIS business objects that provides a graphical user interface to the properties related to business objects.

Campaign

An orchestrated fundraising effort that lasts for a defined period of time, or a series of appeals. Although frequently used by fundraising organizations, campaigns are not required in iMIS Fundraising.

Cash account

Represents ready money available to the organization. Usually, there is a separate cash account for each bank account in which the organization maintains deposits.

Cash accounting

The system of accounting in which income is recognized when the payment is received for an invoice.

Cash basis

The accounting method in which income and expenses are accounted for on a cash-received and cash-paid basis. Contrast with accrual basis.

Cash GL account

GL Account that aligns with an individual bank account that is owned by a financial entity. Traditional payments, once processed and posted, will result in an increase in the balance of a Cash GL account.

Cash receipt

Cash amount (currency and checks) received and deposited into one of the organization's bank accounts.

Cash receipt document

Document that confirms the receipt of a payment from a customer and communicates information about how the payment was applied (such as applied to a new order or an existing open invoice balance).

Cash receipts journal

Journal in which all cash receipts are recorded before they are posted to the general ledger. These entries are reconciled regularly with the bank statements as an internal auditing measure.

Category

A category is a grouping of components similar to the way university courses are grouped by department. The category is a program requirement. You can group component requirements into categories so that completion of some or all of the components meets the category requirement.

Certificate

An official document awarded to an individual to recognize participation in a specific educational seminar or program. Certificates can be used as proof of participation.

Continuing education units (CEU)

Often expressed in hours or points, can be awarded to individuals who participate in or attend a specific educational seminar or program. These units are important for many professionals to earn certification and meet continuing education requirements.

Chapter

Method to organize contacts by regional areas.

Chart of accounts

- A list of all the accounts (names and numbers) maintained by a business.
- System of accounting records developed by every organization to be compatible with its particular financial structure and with the amount of detail required in its financial statements. The chart of accounts consists of a list of GL account names and numbers showing classifications and sub-classifications, serving as an index to locate a given account within the general ledger. A company has the flexibility to tailor its chart of accounts to best suit its needs, including adding accounts as needed.

Claim

In security, an individual right or action applicable to a particular resource. Individual rights are granted by a particular Issuer and allow a user to perform a specific operation on a specific resource or group of resources.

Claims set

In security, a collection of claims granted by a particular issuer to a given user or required by a specific resource in order to perform a specific operation.

Classes (Exposition)

Categories or types of exhibitors, for example, member, non-member, and staff.

Client/Server technology

A method of processing data in which data is stored and processed on a central server, but users interact with data using local machines which retrieve data from and send data to the server.

Clipboard

A designated storage area in the operating system to which you can copy data and from which you can paste data. When you copy data in an application, the data is written to the clipboard.

Combo category

A combo category is a grouping of multiple categories.

Commerce

The trading of something of value between two parties, such as goods, services, or money.

Commerce item

A representation of goods or services offered for sale. A commerce item may be a physical item, a service, a downloadable item, an event registration, a subscription, or a donation.

Commerce transaction

The data set result from the recording and processing of any or all of the following items:

- One or more new customer purchases
- One or more prepayments
- An ordered product
- The assignment of payment or billing instructions for an unpaid order balance
- One or more payments of an existing open invoice balance
- An adjustment related to a previously processed and posted transaction

Commissionable product

A product that generates a commission for a salesperson.

Committed

The actual number of products committed to fill open orders or the number of products in inventory that are awaiting shipping. Committed products do not include backorders.

Communities

An online forum that lets a group collaborate on projects, share knowledge, communicate and connect with others, and stay in touch using email subscriptions.

Community list

A grouping of all of the communities associated with a particular organization or user.

Company conflicts

Strategy that lets you identify companies that are in conflict with other companies. For example, the companies might be exhibiting the same or similar products and do not want their booths in proximity. By defining proximity areas, you can ensure that these conflicting companies do not exhibit their products or services close to one another.

Company flow down

A way to join customers through the Company ID. You can flow down data such as address, phone, and so forth, from the Company ID to the customer record joined by the Company ID.

Comparison method (IQA)

Specifies the method by which data is restricted for a column.

Completed

Indicates that the student has finished the set of requirements of a Certification program or component.

Complex group

A group with roles assigned to some or all members.

Component

- A component is an individual requirement that must be completed before a student can complete a program and achieve certification. Components also can be tracked alone without a program to achieve certification.
- Individual items within a kit.

Confirmation

A letter or notice that is sent to a registrant, confirming receipt of a registration and listing any fees. A confirmation usually lists all of the functions the registrant selected and other details and instructions the registrant included, such as guest information. It might show the current status of the registration and include specific or general comments about the upcoming event, such as instructions for signing in on arrival and reminders of what materials to bring to the event.

Contact

The term used to refer to accounts. Contacts are searchable, can be edited and updated, and can be linked to companies, committees, and workflows.

Contact status

Method to indicate standing within the organization for specific actions, communications, and workflows. Includes the following defaults:

- A – Active
- S – Suspended
- I – Inactive
- D – Mark for Deletion

Contact type

Method to categorize a contact for specific actions, communications, and workflows.

Contact reports

A section of reports that are able to detail activity participation, personal information, and statistics. Users can use these reports to create tables, rosters, and certificates.

Content authority group

A special type of iMIS security group whose members have permissions that are specific only to iMIS content management functionality. Content authority groups are also used to enable content authoring workflow.

Content code

A tool used to help differentiate content records stored in different content folders with the same Publish File Name.

Content designer

A content management tool that allows organizations to build and manage pages of text, multimedia files, and iMIS iParts.

Content gallery

The location of the iMIS Dynamic Content Items (iParts) as well as traditional content types.

Content items

See also iMIS dynamic content items, iParts

Content layout

An iMIS definition object that contains information for how the content zones of a content page will be arranged. A content layout defines only the arrangement of elements that will be displayed for a content page within the main content area. A content layout does not define the overall layout of the website, which is defined by the site's master page.

Content page

An iMIS definition object that contains the content layout information and iParts needed to render a web page.

Content record

An iMIS definition object stored in the Document System that specifies all the information needed to render a web page for an iMIS-controlled website.

Content tagging

A method of categorizing website content that helps users retrieve information.

Content type

A registered iPart definition that includes the information required by WCM to configure, publish, and display the iPart.

Content types

These are the categories within the Content Gallery (divided into sub-folders) that contain the iParts.

Continuum

A tab option on the Staff site that contains the reporting system for iMIS

A program of products and services enabling continuous performance improvement for full-cycle organizations

Control account

General ledger account whose balance reflects the total of balances of related subsidiary ledger accounts. Accounts receivable and accounts payable are the most commonly used control accounts, and their balances serve as a crosscheck (control) of the accuracy of the associated subsidiary records.

Content

- Core Content – pages are standard, out-of-the-box which provide core functionality and are generally shared across multiple websites
- Shared Content – pages that are shared across multiple websites so layout and content changes can be made in one place
- Website-specific Content – pages that are designed specifically for the needs of a single website (may still be shared with others)

Credit

Entry on the right side of a journal entry (that is, it carries a negative accounting sign). Credit has the effect of:

- Decreasing an asset or expense GL account balance
- Increasing a capital, liability, or income GL account balance

Credit memo invoice document

Official document sent by an organization to a customer (Bill to contact) stating that an amount has been credited to an original invoice belonging to the customer. A credit memo invoice document is issued for a variety of situations, including when:

- An invoice amount is overstated
- The correct price sheet or promotion was not applied
- The goods spoil within the guaranty period
- The goods do not meet the customer's specifications and are returned

Customer

A person who has met the membership criteria set up by the association.

Customer type

Categories of membership that define the membership levels and amount charged for membership, or dues and subscriptions.

Customers terms

Customers is the core area of functionality where back-office customer relationship management occurs.

Customer Website

Any website created by an organization to meet the specific needs of its members, donors, or other targeted groups. Changes to these websites will not be affected by upgrades except where they incorporate Core Content pages.

Customizer

An iMIS utility used during system setup to create custom tables and windows for an association.

D-L

Dashboard

The landing page for each of the main navigation areas of the staff site. It provides a quick view of important, up-to-date association contact and membership figures.

Database

An interactive collection of related information that is organized into meaningful units (files, records, fields, graphics, and photos) for storing and accessing in order to facilitate searching and updating information.

Date-limited group

A group with specific join and end dates for the group or for a role in the group.

Deadline date

The deadline date is the date by which the program or component requirements must be completed.

Debit

An entry on the left side of a journal (or T) entry (that is, it carries a positive accounting sign). Debit has the effect of:

- Decreasing a capital, liability, or income GL account balance
- Increasing an asset or expense GL account balance

Debit adjustments

Have the opposite effect of credit memos, increasing the debit balance of open accounts receivable, such as increasing or adding a line item charge or bringing a credit balance to zero due to an overpayment, credit memo, or cancellation transaction. Debit adjustments allow one or multiple funds to be debited at month's end.

Debit memo document

Official document sent by an organization to a customer (Bill to contact) stating that a new amount is owed due to a change applied to an original invoice. A debit memo invoice document is issued for a variety of situations, including a product price change.

Default accounts

Accounts assigned to your organization's entities that serve as the default account if a payment is entered without specifically assigning an account for the payment.

Deferred income

The principle of accounting in which the recording of income is deferred until the accounting period when the costs are incurred, related to the generation of the income. For example, for an event, the deferred income is recorded during the month in which the event occurs. For a subscription or membership, it is typically spread evenly across the span of service.

Designation

A designation is an acronym that is appended to an individual's name to indicate the individual has completed a certification program and is certified in a specific area.

Desktop

An iMIS core site that includes extensive configuration for numerous features: contact management, accounting, billing events, fundraising, and orders.

Display order (IQA)

The order that columns display in the results for a query.

Distribution

Refers to an organization's selling, advertising, and delivery activities.

Document system

A server-side file system containing documents and objects (business objects, query objects, and output processes).

Donation

A monetary or in-kind contribution that is associated with an iMIS distribution. This is a pre-defined combination of a campaign, fundraising appeal, and fund.

Donor clubs

A means of recognizing various levels of giving by contributors. For example, an organization might designate a donor as a friend in recognition of contributions of $500 or more, or as a benefactor for donations of $1,000 or more.

Donor site

A rich and highly customizable Web site for fundraisers conducting charitable campaigns and product sales with the public.

Down payment

An initial payment on an installment pledge. A down-payment is treated as a gift.

Due To-Due From processing

A means of correcting balancing problems when a payment is received and is deposited to an account that is owned by an entity other than the owner-entity of the gift or pledge. Due To-Due From entries are generated when transactions are sent to the General Ledger.

Dues

Membership fees charged to customers.

Duplicate record check

A formula used to make sure the same record is not entered in the database twice. Duplicate record checks are often used on the Major Key field (such as Social Security Number).

Easy edit

An icon that enables staff users to edit and configure iParts and content directly, rather than through the formal content management process.

Effective date

The date used to determine which customers will be billed. Normally, a customer or subscriber will be billed if they have met the billing selection criteria, their Paid Thru date is before the Effective Date, and if a renewal has not already been generated. If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

Engagement Management System (EMS)

A tool that allows organizations to engage members anytime, anywhere, and from any device. This term applies specifically to iMIS 20 and its rich, cloud-based system that includes member management, member self-service, social engagement, private communities, mobile access, and website management.

End date

The date on which an individual's group membership ends.

Enrolled date

The date that a student enrolled in a program or component.

Equity

Net-value, or the excess of total assets over total liabilities.

Event

- A gathering, such as a seminar, convention, or board meeting, for which you need to organize, plan, and track details, including the list of expected attendees.
- Traditionally occurs at a particular time and place. The event might occur at a particular location and be attended in person (for example, a conference or seminar), or it might occur in a virtual meeting place (for example, a webinar or teleconference).

Event code

A tool used to help differentiate event records stored in different content folders with the same Publish File Name.

Event coordinator

An individual who is responsible for managing the planning and/or operation of the event or some aspect of the event.

Event showcase

The detailed display of information about an event. The showcase can include images and a variety of information.

Exhibitor

An individual representing a company who exhibits the company's products or services at an exposition.

Exhibitor products

Products or services that exhibitors show, demonstrate, and/or sell.

Expense

Money expended or cost incurred in an organization's efforts to generate revenue. An expense is typically an event in which an asset is used up or a liability is incurred, such as cost of goods sold, damaged goods, and bad debt expense.

Expiration date

Date on which a group member's role expires. For example, the treasurer might serve one year, but the chair of a committee serves two years. The individuals are still members of the group after their specific role term expires.

Exposition

Large event featuring many companies exhibiting products and services usually associated with one another by the industry they serve or by a similarity of the products and services they exhibit.

Exposition products

Sold by the exposition organizers to the exposition participants, usually called exhibitors. Exposition products are most commonly booths but also include passes and other products, such as sponsorships and advertisements.

Facility

A location that provides a particular service, typically the venue within which an event is being held, for example, a convention center, hotel, or meeting room.

Fees

- Events – Amount charged for events such as educational workshops, seminars, and conventions. Typically, fees are charged for event registrations, but additional fees may be charged for individual functions (for example, workshops, social functions, and meals). In some cases, an event registration fee may entitle a registrant to attend certain functions, and the registrant can purchase additional guest tickets to those functions. Commonly, fees vary by type of registrant (for example, member, nonmember, and speaker) and by the date of the registration (for example, early, regular, and late).

- Exhibitors – Amounts charged to exhibitors for the various exposition products. Fees can be set by exposition classes/types and by when a product is purchased.

  Field

  An individual data element contained within a record. A field may appear in a data maintenance window in the form of a labeled text box or option. The components of the customer name in the Customer Portfolio, for example, are all fields. Note that field may be referred to as a column in certain cases.

  Filter (IQA)

  One or more column-specific search conditions.

  Financial entity

  A legal entity for which a separate set of balanced financial accounts (or set of books) must be maintained independently. Although accounting information from different entities may be combined for consolidated reporting purposes, all transactions and accounts must be kept in balance for each entity.

  Fiscal period

  A month/year combination expressed in terms of a financial entity's fiscal year (as opposed to the calendar year). For example, if the calendar date of an accounting transaction is April 15, 2009, and the fiscal year begins in April, then the fiscal period is 1/2009. Likewise, if the transaction calendar date is March 15, 2009, the fiscal period is 12/2008.

  Fiscal year

  Accounting period covering 12 consecutive months over which a financial entity determines income and profits. The fiscal year does not necessarily correspond to the calendar year.

  Formal event

  An event for which an official registration or a fee is required as a prerequisite for event participation.

  Formal registration

An official event registration for a formal event. Usually, the registrant is expected to attend (that is, a slot or seat might be held for the registrant) unless the registration is canceled.

Fulfillment

The act in which the selling organization meets its financial obligation of delivering the goods and services that have been ordered by a customer. In the case of a physical product, fulfillment occurs when the product is shipped or physically delivered to the customer.

Function

A single session or activity within an event for which you need to assign fees or track attendees. A function can range from breakout sessions and educational workshops to social events such as golf tournaments, banquets, and tours. Because all fees are processed at the function level, you must set up at least one function record for each event or seminar for which fees are assigned.

Function (in Events)

A sub-event or session that occurs within the context of an overall parent event. For example, a conference might incorporate multiple functions or mini-meetings over the course of the conference date span. Such a conference might include multiple break-out sessions, social events, and networking sessions.

Function (IQA)

Summarizes some characteristics of the current set of rows. The functions that are available depend on the data type of the column you selected.

Fund

A legal entity within the organization with its own sets of books. It is a required component of iMIS Fundraising.

GAAP (Generally Accepted Accounting Principles)

Authoritative rules, practices, and conventions meant to provide broad guidelines and detailed procedures for preparing financial statements and handling specific accounting situations.

General journal

Journal used to record journal entries other than those that are recorded in the Sales and Cash Receipts journal.

General ledger

The final record of the transactions affecting an entity. The ledger contains one page for each account.

General/lookup validation table

A table an administrator creates in the iMIS database that contains the valid values for a given field. You can click the lookup icon to select a value, or place your cursor in the field and press Ctrl+L to see the valid values.

Gift

A payment of cash, cash equivalents, assets, or in-kind donations that has already been received.

Gift item

A commerce item that has a suggested amount price, such as for a donation.

GL account

An individual account within the Chart of Accounts that is used to record a financial amount in a journal entry.

Good thru date

The good thru date is the date by which the student must complete the program requirements in order to attain or maintain certification.

Grace period

A grace period is the additional time given to students to complete a set of maintenance requirements.

Group

A method to organize contacts according to pertinent criteria such as chapters, interest groups, industry, or subscribers.

Group member

A contact that is, has been, or will be a member of the particular group.

Group member status

A potential membership stage or state within a detailed group.

Group role

A classification of the way in which a group member participates in the group.

Group type

A method of classifying similar groups for efficiency in setup and reporting. Default information is assigned to a group type, but can usually be changed at the individual group level.

GUID (globally unique identifier)

A 32-character hexadecimal string used to provide a unique reference number. iMIS often uses a GUID to identify controls and interface objects.

Guided performance scorecard (GPS)

A feature in Continuum which is measure of organizational performance

A report that provides a visual representation of association performance in several key areas including recruitment, engagement, and growth.

ID

The numerical representation assigned to a customer or organization.

Identity claim

A security function that describes a set of attributes about a user or other entity.

iMIS dynamic content items (iPart)

The unique components of core iMIS functionality that can be placed together on a content page. They are flexible, re-usable and powerful. Most core iMIS functionally is available as dynamic content items.

iMIS website

Any website that is installed or updated as part of the iMIS standard installation or upgrade process - Core sites and Sample Sites. Changes to these websites (including navigation and related content) are always overwritten by subsequent upgrades

Income

Revenue gained from sales of goods and services.

Income account

- The account number by which income amounts are recorded or recognized. The income account is maintained with the Profit and Loss set of accounts.
- The General Ledger account number to be credited with the fee charged for a particular class/function combination, for example, income or deferred-income account. This information is optional but should be entered if you are want transaction-level reports to print the appropriate account numbers.

Initial requirements

Initial requirements are those requirements that a student must complete to earn initial certification. These can be used with a different set of requirements to maintain certification.

In-kind donation

An in-kind donation is a type of non-cash contribution with market value, such as professional services, equipment, or supplies. It differs from an asset contribution because it can be expected to be used up within a year.

Installment

One of a series of partial payments on an obligation over a period of time. For example, a quarterly installment is paid once every three months.

Instance

An instance is a unique occurrence of a component, such as a specific class. An instance also is called a location.

Instructor

The instructor is the person teaching or presenting a course or component.

Inventory setup options

The accounting treatment to be used for inventory. System defaults are FIFO, LIFO, Average, and Standard.

Invoice

An official object that itemizes all of the product charges and miscellaneous fees involved in a sales transaction. The invoice contains key reference data, such as the invoice number, invoice date, references to the originating order, customer information, and billing instructions.

Invoice date

The date on which the invoice was issued or created, usually the date of product fulfillment. For an accrual invoice, the invoice date is the accounting transaction date for the related sales journal entry.

Invoice distribution line

An object attached to a parent invoice line that carries related accounting information and represents the detailed invoice balance level to which all payments are applied. Individual invoice distribution lines are created for each income account that is used in booking the income for the parent invoice line.

Invoice document

The printed or electronic invoice information sent to a customer.

Invoice due date

See Payment schedule due date.

Invoice header

The portion of the invoice that contains general information about the invoice, such as the invoice number and date, customer information, and billing instructions.

Invoice line

A sequentially numbered line in an invoice that represents the charges for an individual product line, or a partial quantity of a product line, that has been fulfilled, or a miscellaneous fee, such as taxes or shipping and handling. The extended amounts of all invoice lines should equal the grand total of an invoice.

Invoice number

A unique, sequential number assigned to each invoice as the primary reference.

iPart (Dynamic Content Item)

The unique components of core iMIS functionality that can be placed together on a content page. They are flexible, re-usable and powerful. Most core iMIS functionally is available as dynamic content items. It is an ASP.NET web part control designed for integration with iMIS that allows users to view and, in some cases, create and edit content.

IQA (Intelligent Query Architect)

The query-building tool used to extract data from the iMIS database.

Issuer

A trusted source for granting Claim Sets based on user authentication.

Item

Generic term for commerce objects. For example, an event item, a dues/billing item, or a gift item. Items can be grouped into item sets.

Item class

The method to assign the default GL accounts, tax schedule, standard discount percentage, and other settings to be used for a type of commerce item, such as Chapter Products or National Events.

Item set

A collection of commerce items with related options and rules. For example, an event plus required functions, a product bundle, or a collection of membership and other fees.

Item showcase

A display of information about a commerce item. The showcase can contain all information and images for the item or can link to other pages.

Item type

A general kind of simple commerce item, usually used to differentiate a gift (donation) with a suggested amount from a commerce item with a set price.

Itinerary

A list of functions a person has chosen for an event. The itinerary can contain an informal choice of functions (pre-registration itinerary) or a formal registration, if required (post-registration itinerary).

Join date

Date on which an individual became a member of a group.

Joins (IQA)

Relationships between data used in query definition. Joins specify which fields are equivalent so the data is associated correctly.

Joint requirements

Joint requirements are those that a student may use if the student is enrolled in two programs.

Journal

Business diary in which all financial data pertaining to the day-to-day business transactions of an organization is recorded. From the journal, debit and credit changes caused by each transaction will be posted to the designated accounts in the general ledger.

Kit

A product set of two or more components (items or services) that are sold for a single price. Kits are often used to present a group of items as a bundled, discounted product. In addition, kits are a useful method to distribute the costs of individual items (components) among multiple income areas for accounting purposes.

Ledger card

Shows the record of the transactions related to the individual currently selected.

Liability

- Claim against the assets or legal obligations of a person or organization. Liabilities include amounts owed to lenders and suppliers, amounts received in advance for a future sale or for a future service to be performed (unearned or deferred income).
- Debt or financial obligations owed to creditors.

Line item

Individual dues or subscription line associated with a specific customer or subscriber.

Linked function

Linking functions is a one-way shortcut for data entry by which registering for a primary function automatically registers for all linked functions, that is, selecting the parent selects the children.

Linked product

Associates a parent or primary product with a child or secondary product. When exhibitors order a primary (parent) product, iMIS automatically adds the linked child product to the order.

List as

An alternative way to list a contributor when the contributor does not want to be acknowledged by name. For example, the contributor might want their gift or pledge listed as:

- in the name of
- the family of
- anonymous

List billing

The generation of a single renewal notice to a Bill To third party, such as a company that will be responsible for paying the fees for multiple customers or subscribers.

M-R

Maintenance requirements

Maintenance requirements are the requirements a student must complete to maintain certification after initial certification is obtained. Maintenance requirements typically must be completed repeatedly over specific time periods.

Mapping

Translates one value into another. For example, iMIS might translate (map) a virtual address to a physical address.

Matching gift

A gift created when a donor's employer has agreed to make a matching contribution (usually a percentage of the employee's gift) when the donor makes a gift. iMIS treats the matching gift as a request or a pledge until the money is received from the company.

Matching plan

A plan set up by a company to match gifts donated by its employees to nonprofit organizations. In iMIS, the matching plan is set up as a percentage of gifts/pledges within a certain monetary range, for example, 25 percent of employee gifts ranging from $20 to $100.

Member mobile site

An out-of-the-box iMIS site that renders a version of the Member site that is optimized behaviorally and formatted for use on smart phones and tablets. This site is accessible by your association members and by your staff who are working off-site or on-the-run.

Member site

An out-of-the-box iMIS site that offers a rich self-service experience for your association members and prospects. This site enables you to choose from a variety of visual themes, change navigations in just a few clicks, and add any number of query-driven iParts to present dynamic information to your site visitors.

Memorial

A gift or pledge made in memory of someone.

Method of receipt

Indicates whether a purchased item will be shipped to the customer or the customer carries the item out. The method of receipt effects which taxes should be applied.

Monetary application

The link between an invoice distribution line with another object, such as a payment, a payment reversal, or an adjusting invoice, that is applied towards decreasing or increasing the balance of the distribution line. In most cases, a monetary application represents the amount of a payment that is applied towards an individual invoice distribution line.

Multi-entity

For accounting purposes, multi-entity enables you to use distinct financial entities, for which separate accounting statements are prepared, for different purposes within iMIS modules.

Multi-function event

An event that incorporates multiple break-out sessions, social events, networking brown bags, or other functions which a registrant can attend.

Multiple entities

For accounting purposes, defining more than one individual or organization for which accounting statements are prepared. For example, an association might need to assign certain accounts to a nonprofit entity and other accounts to a for-profit entity.

Multi-warehouses

An option that allows you to record and store a stock item's inventory in several different warehouse locations.

Net income

Total income in an accounting period, less all expenses during the same period. If income taxes are not deducted, it is called operating profit (or loss). Also called earnings, net earnings, or net profit.

Non-authenticated user

A user who has not logged in.

Non-commerce event

An event in which there are no fees. Registrations for a non-commerce event are processed on a direct basis, not through a commerce order.

Non-Customer

A person who has not met the membership criteria set up by the association.

Notice specific text

Refers to the additional text that can be printed on the initial, first or second billing and reminder notices.

Notification

The acknowledgement sent to the Notify IDs (family, business associates, and friends) when a gift or pledge is made in memory of or in tribute to their family member, business associate, or friend.

Notify ID

A family member, business associate, or friend of an individual who is being memorialized or honored. Notify IDs will be notified when a gift or pledge is made in memory of or as a tribute to the honoree.

Object (IQA)

Self-contained element that consists of instructions to manipulate data. For example, a business object or query object.

On behalf of (proxy)

Performing an action in place of another person.

On order

The quantity of a product on order with a vendor or supplier.

Open credit

The portion of any payment that is in the unrestricted, unapplied state. An open credit can be applied toward new or existing orders or open invoices.

Open invoice

An invoice with an unpaid balance.

Open item

Any item with a non-zero debit or credit balance.

Open order

An order that is not 100% fulfilled.

Operation

A well-known system function, such as Create, Read, Update, or Delete that can be performed for a specified resource within the application.

Order

A customer request to purchase one or more products.

Order (Exposition)

Commitment by the exhibitor to participate in an exposition by purchasing booth space and possibly some other exposition products.

Order processing stages

Steps orders must go through until the orders are complete. The number and type of order processing stages an order goes through depends on the setup of the order type. Different order types require different order processing stages. Examples of order processing stages include:

- Convert quotes
- Print shipping papers
- Ship orders
- Invoice orders

Order types

Determine how orders are processed. All orders are entered as a specific order type.

Organization

Name for company-type contact record.

Overlay text

Additional or customized text that can be printed over or on top of the preset renewal notices with the standard report elements printed underneath. It behaves similarly to how a transparency would lay on top of a paper.

PAC (Political Action Committee)

A group or committee created to raise money for the purpose of electing a candidate.

Page builder

The tool used for building web pages comprising content items in the Content Gallery. Formerly known as Content Designer.

Paid Thru

Refers to the expiration date of the membership or subscription, or the period through which the customer has paid. It is always the last day of the month.

Parameterized query (IQA)

A query that requires a value from the user at runtime.

Pay priority (commerce)

The order in which payments are applied to invoice line items.

Payer contact

The party that made the payment (officially owns the bank account or credit card being used for the payment). The payer contact is normally, but not always, the same as the bill to contact.

Payment

A sum of money paid.

Payment alternative

A category of payment instructions which are provided in lieu of a traditional payment, such as Bill Me, Bill My Company, or Application of Open Credit. Payment alternatives do not create a new payment object when processed or posted.

Payment date

The date when a payment was deposited into the bank account. The payment date will always be assigned as the accounting transaction date for the related cash receipts journal entry.

Payment instructions

Information collected and/or derived by the system that indicates how a financial obligation will be met.

Payment method

The allowable method of payment a customer can use and the bank account into which the payment should be deposited. The payment method might specify the general type of payment (credit card, cash, check), or it might specify a specific type of payment (VISA, MasterCard).

Payment method set

The collection of pre-defined payment methods that are allowed for a particular commerce transaction process.

Payment reversal

A complete or partial reversal of an original payment stemming from a credit card refund, a bad check, or a credit card charge back.

Payment schedule

The amount due and due date for payments, in accordance with the payment terms.

Payment schedule due date

The date by which the payment for an invoice balance must be received. The due date is typically calculated as a certain number of days from the invoice date, in accordance with the payment terms.

Payment terms

The period of time allowed to pay for the goods and services that have been ordered. Payment terms may include standard terms (such as Net 30) or a specified payment schedule.

Payment type

The highest-level category of payments such as Cash, Credit Card, Debit Card, or Bill Me. The payment type defines the required information to be entered for payment instructions and how the payment transaction should be processed.

Person/People

Name for individual contact record. Contact records contain the descriptive contact and demographic information for each iMIS user (and for non-users). A contact record must be created for a new user before you can create a user record to link to that contact record.

Pledge

A contribution to be made sometime in the future that has not yet been received. A pledge can be a one-time contribution or can be made in installments over time.

Posting (batch)

Procedure that updates accounts with specific transaction amounts or transfers temporary transactions to permanent records (appropriate accounts in the general ledger).

Premium

An incentive gift that a donor may receive for a gift or pledge, such as a coffee mug or T-shirt, in recognition of the contribution. A premium is a distribution with an assigned market value.

Prepayment

A payment that accompanies an order or is made in advance. The prepaid amount is recorded in an Unearned Income liability account until the ordered products are fulfilled and the payment is applied to the associated invoices.

Prerequisites

Prerequisites are the requirements a student must complete before the student can enroll in a certification program.

Price sheet

A set of product prices and price calculation rules assigned to customers or orders of a certain type.

Priority (IQA)

The order in which the data for a particular column is sorted.

Pro forma order

An order initially treated as a price quote that might result in a sales order at a later date.

Process manager

Process manager helps to optimize opportunities presented to an organization, build ongoing relationships, and manage processes assigned to individuals or groups. Process manager provides the means to analyze, forecast, and report on those efforts.

Product

An item or service that your organization offers for sale to its customers.

Product adjustments

Adjustments to inventory due to breakage, pilferage, giveaways, or physical inventory count differences.

Product category

An association-defined classification for products. These are used to assign default accounts and to enable category options for groups of products.

Product codes

Refers to a unique code that identifies a product that will be billed, or for which an organization collects money.

Product conflicts

Strategy for ensuring that companies exhibiting similar products do not exhibit in the same area. Product conflicts are managed by defining proximity areas and only assigning booths to companies exhibiting certain products in those areas.

Product kit

A group of products sold as a single unit for a single price.

Product receipts

Receipts record products received in inventory.

Product transfers

Transfers allow you to transfer a product's inventory from warehouse to warehouse.

Products

A defined commerce item.

Program

A program is the set of requirements a student must complete to achieve certification. A program also may have multiple parts, such as a set of initial requirements to obtain certification and another set of requirements to maintain the certification. You also can specify a specific date by which a program must be completed.

Program groups

An association of multiple certification or experience programs together, requiring one program to be a prerequisite for another program.

Prorating

Allocating or assigning an amount to an activity or product that is proportional to some base (determined by a formula or procedure).

Provider

A provider is the individual or company who sponsors a component instance, such as a class or course.

Proximity

You can identify and define proximity areas as a strategy for managing company and product conflicts. Proximity is defined by location relative to certain areas of the floor, such as the Food Court, or relative to location, such as the Southeast Quadrant. You also can use proximity to group similar vendors together on the floor, such as in the Technology Center or the Education area.

Proxy

See On behalf of (proxy).

Pseudo

These are iMIS-generated GL accounts. The pseudo accounts are duplicates of actual GL accounts. The pseudo accounts contain the Org Code - Module-, Product Code, AR, or Pay.

Publishing server

A local service running on a web server that generates physical files representing the content defined by a content page and adds related search metadata to the search index on the local web server.

Quantity on hand

Specifies how many products are currently in stock. These are products that have been received but not shipped.

Query

User-defined criteria used to retrieve a subset of data.

Quick start sites

The ready-to-go sites and site templates that can get you up and running in hours, instead of weeks or months. Also called Sample Sites.

Rapid gift entry

Gives the ability to enter Date Received, Gift Type, Gift Amount, Distribution, Appeal, Campaign, and Fund from the Enter and edit gifts window.

Record

A record is an individual unit within a table that consists of a collection of fields, which are consistent in number and type from one record to the next. For example, there is a separate record for each individual or company whose information is contained in iMIS. Records are sometimes referred to as table rows.

Registrant

An individual that has formally registered to attend a particular event, typically by submitting a registration form along with payment of any registration fees. An individual registrant might not necessarily be a customer of the association holding the event or have a record in the customer database.

Registrant class

A broad group of registrants that enables you to process and handle registrants according to category. Class categories let you assign different fees for members and nonmembers, print badges separately (such as for color coding), and subdivide summary reports into meaningful registrant classes.

Registrant information

Personal information including, but not limited to, registrant name, address, title and association affiliation. This information is used for reporting, and can also be used for event badges.

Registration

The recording of those signed up for an event or function, as opposed to those who actually attended (see Attendance). Because of no-shows, registration figures will usually be higher than attendance figures.

Registration option

The classes of registration set up for an event. These can be arranged by membership type, payment status, or time of registration.

Registration status

The current state of relationship between a person and an event or function.

Registration type

Designation of an event's requirement for registration or fee.

Relation (IQA)

The part of a query definition that specifies a relationship between two or more sources, which effectively creates a new temporary table against which the query is run.

Relationship

A method for establishing a logical connection between two customers in the database.

Relationship (Join) operator (IQA)

The specific type of relationship between two sources.

Renewal invoice

An invoice generated by the selling organization to request that the customer repurchase or renew a subscription or membership service. The renewal invoice data is generated directly and is not connected to the fulfillment of an order.

Renewal notice

- Accounting – Document that is frequently sent to a customer, rather than a renewal invoice. The renewal notice is typically used in cash basis accounting systems to document the renewal or continuation of a subscription or membership.
- Membership – Refers to the request for renewal or continuation of a membership or subscription beyond the current expiration (Paid Thru) date.

Renewed thru

Refers to the projected Paid Thru date for an overall membership. It is the term-ending date through which the customer has been billed, whether or not payment has been received.

Reporting

A set of tools in iMIS that can be used for a wide range of tasks. Reports span a broad range of outputs for all of the iMIS modules, including rosters, status summaries, letters, badges, and statistical reports.

Request

A record of a specific request for a donation. A request is recorded at the time the request occurs, such as when you mail a letter or make a telephone call asking for a donation. Entering a request activity can speed the entry of a resulting donation.

Reservations

Companies can reserve exposition products without making a payment or placing an order. Exposition products are reserved in the Reservation window where you can assign booth numbers and proximity area. Not all organizations allow companies to reserve exposition products.

Reserved

Indicates how many products are in open order status. Reserved orders include both shippable and backordered items.

Resource

- A type of equipment, an individual, or some other asset needed to perform a task or service at an event function. Within iMIS Events, resources refer to both specific and categorical groupings used to describe room setup and planning needs.
- An application object that exposes properties and methods to allow users to interact. In claims-based security, such resources are assumed to be secured.

Resource group

A logical group of related resources that share a common set of claims. Such groupings simplify the need for assigning and checking for required claim sets.

Restocking fee

A fee charged to restock returned products.

RFM

A measure of the participation of contacts and prospects in the following:

- Recency – Period of time in days or months that has elapsed since the last transaction between a contact and an organization.

- Frequency – Number of times a contact has transacted with an organization.
- Monetary – Value of a contact's transactions with an organization.

RFM report

Ranks and organizes contacts and prospects into specific groups according to the relative recency, frequency, and monetary value (RFM) scores of their transactions.

RiSE

The Web Engagement Platform in which iMIS is built, and with which you can build and extend your own sites.

Roster

A report listing registrants for events and/or individual functions within an event. This is different from the Company Roster which is shown in the Customer Portfolio.

Rotating requirements

Rotating requirements are requirements that must be completed repeatedly for the student to maintain certification.

S-Z

Sales journal

Journal for first entry of sales invoices issued to customers for goods supplied or services rendered. Entries from this journal are posted to individual customer accounts. The totals are posted to the general ledger as a debit to accounts receivable and a credit to income.

Sample site

The out-of-the-box iMIS websites that are easily copied in order to create customized sites for an organization. Sites include Member, Member Mobile, Donor, Annual Conference, and Annual Conference Mobile.

Schema

The structure of a database.

Search index

A database, used by an index server running on a web server, that is updated by the publishing process and is used for quickly retrieving weighted results for website searches and in the compilation of output for tagged list content.

Security administration

Provides options for administering user records and the roles you can associate with user records.

Security groups

Control which iMIS features group members can see, and which capabilities within each feature group members can use. Security groups are defined in the user record.

Security roles

Grant specific administrative privileges to user records. For example, one security role might let you use and edit an iMIS definition object in the Document System, while another security role might let you use that object but not edit, or even see, its properties.

Segmentation

Groups contacts and prospects into targeted audiences to show demographics and behavioral patterns

SEO – Search Engine Optimization

The process of affecting the visibility of a website or a web page in a search engine's natural search results. iMIS users can customize their websites using tags, article titles, quality content, and intuitive links to maximize their SEO.

Shopping cart

A tentative commerce transaction data set that exists for any new commerce transaction until checkout and order submission. The cart might contain products added to the cart, adjustments processed, and the list of open invoices selected for payment. Items can be added, edited, or removed from the cart at any stage before submission.

Shortcut URL

iMIS-supported ability to define a friendly, easy to remember URL (e.g., www.MyOrg.org/AnnualConference, www.MyOrg.org/Events, www.MyOrg.org/Join) that redirects to a specific page. These can be created for any website, and can link to a URL or content record.

Shortcuts frequently access system pages such as SignIn, EventDisplay, ItemDisplay, AccountPage. They are provided out-of-the-box, and can be edited, but not deleted

Simple event

An event with no functions. A simple event can be for information only (no registration required) or can require registration.

Simple group

A group with no assigned roles or date limits.

Simple item

A commerce item that has a single price.

Site builder

The tool used for building and managing websites.

Site designer

A website and navigation management RiSE tool that allows organizations to establish one or more websites, create navigation menus and connect navigation to content.

Sitemap

- A zero-based hierarchy of navigation within and between websites. There is one sitemap per website. This feature enables:
- Different navigation for different user groups – within the same website (e.g., Staff/Authenticated/Unauthenticated)
- Map navigation to different content for different user groups

- Override behavior of shared content (iParts) when accessed via specific navigation
- Override ContentArea source folder (look & feel elements)

Soft credit

A term used to describe a behind-the-scenes individual who helped obtain the gift or pledge, but who is not listed as the donor. Contrast soft credit with the contributor or hard credit (the individual who receives the actual credit for the gift or pledge).

Solicitor

An individual other than the donor responsible for obtaining a specific pledge or gift.

Sort

Dictates the order in which the details are to be displayed or printed in a list or on a report.

Source (IQA)

Object that is available for building query definitions. Sources include both business objects and query objects. Query definitions can be created based on one or more sources.

Source query

The original query or business object from which a new query is run.

Split gift

A gift or pledge that is distributed among more than one fund or that is split within a fund.

Staff site

Offers an easy, cloud-based, convenient way for staff to manage association business from the web. Staff can complete transactions and updates for contacts, assist in renewal, registration, and purchasing. The site also allows staff users to run reports, create and manage events, and utilize the robust RiSE tools, all on the way to moving to a fully web-based system.

Standard invoice

Document issued by a seller to a buyer detailing goods and services sold. Also called a bill of sale or contract of sale, it identifies the trading parties, the assigned invoice number, and the invoice date. It also lists, describes, and quantifies the items sold, shows the date of shipment and mode of transport, lists prices and discounts (if any), and shows delivery and payment terms.

Standard program

A standard program has no maintenance or rotating period. The student is required to complete only one initial set of requirements to achieve certification.

Standard report

Pre-set iMIS report formats including rosters, labels, and statistical reports. Most standard reports allow you to select which records you want, and most let you override the sort order. However, you may be limited to the amount of control you have over the format or layout of the report.

Stock item

A product marked as a stock item allows tracking inventory and recording cost of goods sold, inventory, and accounting entries.

Subscriber

Individual, either customer or non-customer, who has purchased a product of a cyclical nature having a fixed term which can be renewed or repurchased upon term expiration.

Subsidiary ledger

A ledger that contains a group of related detail accounts whose total is shown in a controlling account in the GL

System administrator

A user with complete access and privileges.

System role

Used in claims-based security. System roles include:

- Non-authenticated user – A user who has not logged in.
- Authenticated user – A user who has logged in.
- System administrator – A user with complete access and privileges.

Tag

Keyword or category name used to classify website information.

Tagged list

- Listing of content tagged with a specific keyword and, optionally, related tags.
- An iPart which aggregates content pages that contain specified tags and satisfy other defined criteria into a display list. The tagged list definition includes an association with a tagged list format that defines how the aggregated content will be displayed.

Tagged list format

An iMIS definition object that contains information for how a tagged list iPart should display details for each content page that is displayed by the tagged list.

Tagging

When a content author tags a content page, the tag is added to the metadata for the content page and to the website's search index. This facilitates the inclusion of the content page in website searches and tagged lists displayed on other content pages.

Tagging hierarchy

Visual means of displaying relationships between content tags.

Target contact

The person on whose behalf you are performing an action.

Tax authority

A jurisdiction or geographical area to which a set of specific taxing rules apply.

Tax category

General collection of items that have common taxation rules.

Tax schedule

All tax authorities that apply to a particular situation, such as:

- the purchaser
- the location
- the item class
- the individual item

Also, the order in which taxes are calculated when more than one tax applies.

Ticket

Preprinted slips of paper that a registrant receives in advance for each function he or she is registered to attend. You can use tickets to control and track function attendance by restricting admission to ticketed registrants and by using collected tickets to verify attendance.

Tickler

A way to notify a customer that they need to take action on a given activity, such as a call. When a member logs on to iMIS, a message displays notifying them of the action needing to be taken.

Traditional payment

A category of payment instructions that, when processed, creates a new payment when the order is fulfilled. Traditional payments include Cash, Check and Credit Card.

Transaction

An event or condition that is recorded in asset, liability, expense, revenue, and/or equity accounts.

Transaction record

A record containing information entered by the user to cause a change to a file. This change is any kind of transfer between the accounting entity and an outside party.

Tribute

A gift or pledge made to recognize an individual's service to an organization, cause, or some other entity.

Unearned income

A liability that is recorded when assets are received before the order is fulfilled. Unearned income can be due to:

- a payment in advance of products or services being supplied
- an unidentified payment
- an overpayment
- a duplicate payment
- a return or cancellation of products or services involved in an early pre-paid sale

Unit of measure

The measurement amount for a product, such as:

- case
- each
- meter
- sheet
- pack
- box

Units

Units are the number value assigned to a component or category in order to measure when the student completes the component or category.

Unposted transaction

Any order, invoice, or payment that has been recorded but remains in a tentative state. While in the unposted state, the transaction can be easily changed or deleted without generating an audit trail of the change.

Upsell

Associates a product with another product as an upsell potential. For example, an exposition might offer other products, such as show directory ads, market research rooms, and sponsorship opportunities. Salespeople can view the upsell options available when marketing a specific product.

User-defined field

A method to add metadata to content and to filter search results.

Valuation method

The method used for valuing product inventory. In iMIS, either the average or the standard cost valuation methods can be used. The average valuation method calculates the total cost of goods sold, divided by the total inventory on hand as averaged over time. The standard cost valuation method determines the cost of goods sold based on a fixed amount.

Wait list

A list of registrants who are queued in hope of attending a function that has already reached its attendance limit. Wait-list members might be allowed to attend the function if the attendance limit is changed, if additional sessions are added, or if other registrants cancel their registrations for the function.

Wait listing

A strategy that allows an exhibitor to be placed on a waiting list to purchase an unavailable booth or other exposition product. Exhibitors placed on a wait list have the opportunity to buy the exposition product when it does become available due to an order cancellation or expansion of the floor plan.

Web components

A RiSE tool that is customizable and configurable for associations. Components include website defaults, customized error messages, and organization information.

Website

A public-facing, easy-to-create site that fully utilizes iParts and SOA.

- Defines a front-end URL for targeted users
- Provides a unique look & feel (branding)
- Restricts access to specific users/groups
- Provides a unique navigation structure

Workflow

Automatic processes that are executed without human intervention. Each has an ownership structure, are related to a specific parent object, like an order, complaint, and so on, have a set of tasks that must be executed according to business rules.

Write-off

Removal of the outstanding value of an invoice that is deemed uncollectible or that carries a trivial positive or negative balance. The result of the write-off transaction is to bring the invoice balance to zero. In the case of an accrual invoice, the amount written off is charged against the net income by recording either a bad debt expense or an adjustment to income.

Accounting Console

Your Administrative Console includes Accounting, offering quick access to tools your accounting staff need most frequently for maintaining your organization's accounts.

This is the primary navigation area where Accounting staff will spend most of their time in the Admin Console.

Depending on your license keys, some areas may not be listed in your Administrative Accounting. The license keys needed for each area are:

- Transactions (CASH)
- Processes (CASH)
- Adjustments (CASH)
- Options (CASH)

Transactions

Enter and edit cash receipts

Cash receipts allow you to record payments that are applied against open items, received in advance of sales orders or requests, or of unknown purpose. Typically, cash receipts are the most frequently entered transaction types.

The Enter and edit cash receipts window records amounts received that apply to open AR items. Similar to the Enter and edit sales transactions window, the Enter and edit cash receipts window has a heading section that identifies the following:

- Transaction date
- Customer account ID
- Overall payment information

Below the heading section, the window details the open items where cash can be applied.

To enter AR payments

Note: If the Cash Application Auto apply option is not enabled on the Configure accounting options window, iMIS enables you to decide the line items where the payment should be applied.

1. From the Enter and edit cash receipts window, click New.
2. Enter the customer ID and press Enter, or use the lookup icon to select a value and click OK.
3. If you want to apply a credit balance to an item, perform the following steps:

1. Enter an asterisk (*) in the Check/CC field and press Tab.
2. Select the credit from the drop-down list on the Select Open Payments window (you can toggle between viewing the individual's available credits and all available third-party credits by clicking the Indiv/All toggle button) and click OK.
3. Enter the credit amount in the Payment Amount field.
4. In the Check/CC field, enter the check number or credit/debit card type, and press Tab. If you entered a valid credit/debit card type in the Check/CC field, enter the following information:

- CC # – Enter the credit/debit card number.
- CSC – (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value for specific cash accounts.
- Exp – Enter the card's expiration month and year (mm/yy).
- Authorize – Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC – Enter the name as it appears on the card.

- Issue # – (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date – (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

5. Enter the payment amount in the Payment Amount field, and press Tab.
6. Select one of the following transaction options:

- To apply cash to an item, double-click on the item in the list and enter the amount to apply to the item in the Amt Paid field.
- To undo the cash application, double-click the item again.
- To apply cash as a future or unidentified credit, double-click the (Pre-Pay - New) line (or single-click and fill in the Amt Paid with the prepayment amount), which creates an item named PrePay: transaction date.
- To partially apply cash to an item, select the line and enter the amount to apply to the item in the Amt Paid field.

7. Click Save.

   To automatically apply AR payments

   Note: You can edit only transactions that are in an open batch or that have not been transferred to the GL.

   The method for finding and editing AR payment transactions is similar to the sales transaction editing process.

1. In the Enter and edit cash receipts window, click Open.
2. Enter the customer ID and press Enter, or use the lookup icon to select a value and click OK.

3. Select the line item for the transaction you wish to alter.
4. Click Edit.
5. Enter the payment amount in the Payment Amount field.
6. Enter the payment amount in the Amt Paid field.
7. Click Save.

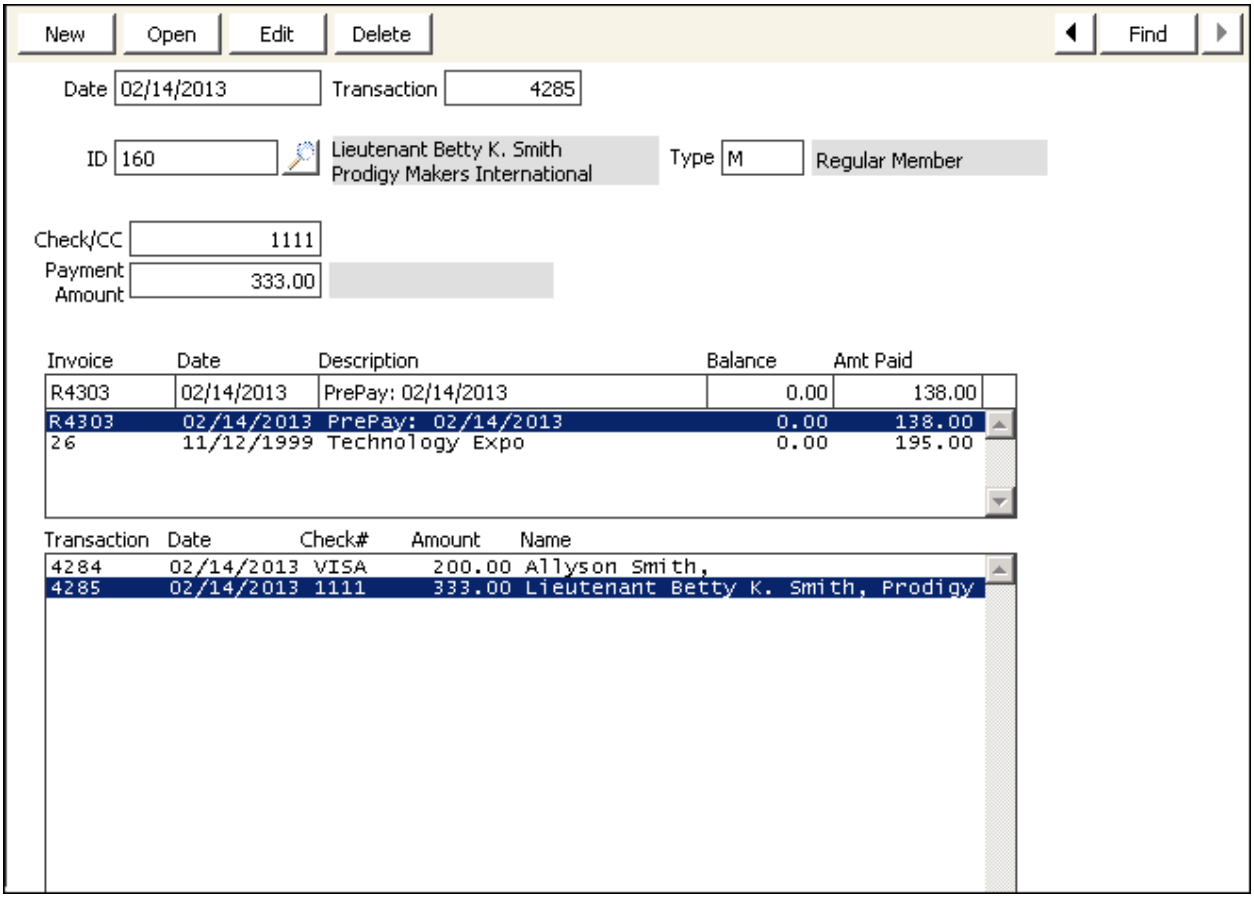
To reverse a payment and record returned checks

Use the Enter and edit cash receipts window to record returned checks, or to reverse all or a portion of a payment for a sales transaction or simple order entry transaction if the payment was made through Cash Receipts. The following procedure records a returned check.

1. From Enter and edit cash receipts window, click New.
2. Enter the customer ID and press Enter, or use the lookup icon to select a value and click OK.
3. Enter the original check number or credit card information.

   Note: If you are recording a returned check, you can preface the Check/CC field entry with RET or a similar abbreviation to make it easier to identify return checks in reports and window displays.
4. Enter a negative amount in the Payment Amount field.
5. Select the line item where the payment is to be removed.
6. Enter a negative amount in the Amt Paid field.
7. Click Save. The Enter and edit cash receipts window opens.

Enter and edit cash receipts window



Admin Console: Accounting > Transactions > Enter and edit cash receipts

Desktop: AR/Cash > Enter and edit transactions > Cash receipts

Date

iMIS automatically enters the current system date (or the date you entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to return to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date, which you cannot override.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Invoice Number

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

ID

Enter the customer ID that applies to the cash receipt, or use the lookup icon to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Check/CC

If payment is made by check, then enter the check number. If the payment is made by credit/debit card, then enter the abbreviation for the credit/debit card.

To apply a credit balance to an item, enter an asterisk (*) in the Check/CC field and press Tab. Select the credit from the drop-down list on the Select Open Payments window (you can toggle between viewing the individual's available credits and all available third-party credits by clicking the Indiv/All toggle button) and click OK. Enter the credit amount in the Payment Amount field.

AR credit/debit card codes should already be set up on the Set up cash accounts window. See Setting up Cash Accounts for information on this procedure.

If you enter a valid credit/debit card code, additional payment fields display:

- CC # – Enter the credit/debit card number.
- CSC – (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a

Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.

- Exp – Enter the card's expiration month and year (mm/yy).
- Authorize – Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC – Enter the name as it appears on the payment card.
- Issue # – (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date – (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).
- Gateway Ref # – Read-only: Populates when the gateway provider returns the reference number for the transaction.

  Note: If Advanced PCI Compliance (see Implementing Advanced PCI Compliance options) > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Payment Amount

  Enter the payment amount, whether the payment is made by check or credit/debit card.

  Invoice

  Displays the invoice reference number.

  Date

  Displays the invoice date.

  Description

  Displays a brief description of the selected invoice.

  Balance

  Displays the invoice balance.

Amt Paid

Displays the amount that is being applied to the selected invoice.

Transaction list

Displays the transaction date, check number or credit/debit card type, transaction amount, and customer name.

Import transactions

Order data is imported in the form of tab- or comma-delimited files. Before using the Orders Importer to import your files, be sure to back up your iMIS database. If your import fails, you can restore your original data from the backup copy. Otherwise, you must manually delete each transaction in the imported batch.

When importing orders, you need to be aware of the following:

Product status codes

Only products with an Active status can be imported. If an order line's product does not have an Active status, the Importer will not import the order line, and the order line will be inserted into an error log along with any other order line failures. No other order lines will be affected; the Importer will process the order's remaining order lines.

Payments

The iMIS Orders Importer does not support entering multiple payments. Only single payments can be imported.

Freight charges

If you want freight charges to calculate automatically for an imported order, you must enable the Automatic Calculation of Freight Charge and Freight by Weight options on the Add-on Charges window (go to Configure > Commerce > Configure commerce options, and click Add-on Charges). The Orders Importer does not support the Freight by Total Value Ordered or Freight by Total Quantity Ordered options.

Multiple warehouses

The iMIS Orders Importer supports Multi-Warehouses when the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (go to Configure > Commerce > Configure commerce options, and click Inventory).

If the Enable Multi-Warehouses option is disabled, the Importer will ignore any warehouse location entered when an order is imported. The Importer then determines whether the product is a stock item:

- Product is not a stock item – Order_Lines.LOCATION is left blank.
- Product is a stock item – Order_Lines.LOCATION is populated with Default.

If the Enable Multi-Warehouses option is enabled, the Importer first verifies whether the product is a stock item:

- Product is not a stock item – Order_Lines.LOCATION is left blank.
- Product is a stock item – The Importer verifies whether Order_Lines.LOCATION is populated:
- Order_Lines.LOCATION is not populated – The Importer populates Order_Lines.LOCATION with the Default Warehouse defined on the Inventory System Setup window.
- Order_Lines.LOCATION is populated – The Importer uses the defined warehouse location. If the defined warehouse location does not have sufficient products in inventory, the import will fail, and an error message will be generated.

To import orders

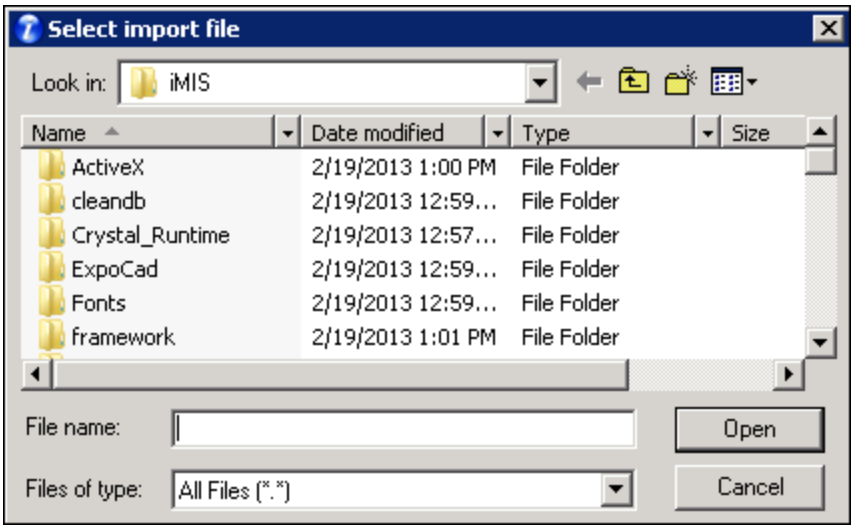
Note: Only products with an Active status can be imported.

1. Create the files that you want to import in either a tab- or comma-delimited file format. After creating a file, you can import it into iMIS. For more information, refer to Formatting import data.
2. From the Select import file window, find and select the tab- or comma-delimited file that you want to import.

3. Click Open. A system message will indicate that the transactions are processing.
4. If there are any problems while importing the file, an Order Import Error Report will print:

- A Warning message indicates that a problem exists with an order but that the file was still imported.
- A Fatal Error message indicates that the file was not imported. If an import does fail, check the import file for stray spaces, missing tabs, or other errors.

Select import file window



Viewing imported orders

You have several options when viewing imported orders. You can view them in the Enter and edit orders window just as with orders entered manually, or you can view them in reports.

If you want to edit an imported order, you will need to open the order in the Enter and edit orders window.

If you want to view your imported orders in reports, whether or not you enable batch control when importing orders determines which reports you use:

- Batch Control Disabled – If batch control is not enabled, you can view the imported orders on the Order Detail Report (go to Continuum > Events and Orders Reports > Order

processing reports, select Order Status, select Order Detail Report, click Run, select the date range, and click OK).

- Batch Control Enabled – If batch control is enabled, you can view the imported orders on the following reports:
- Order Detail Report by Batch report (go to Continuum > Events and Orders Reports > Order processing reports, select Order Status, select Order Detail Report by Batch, click Run, select the batch, and click OK)
- Batch Transaction Listing report (go to Accounting > Processes > Manage batches, select the open import batch, and click Print Selected) – Lists the batch's prepaid orders
- Batch Posting Listing report (go to Accounting > Processes > Manage batches, select the open import batch, and click Post Selected)

Enter and edit sales transactions

Use the Enter and edit sales transactions window to enter sales transactions that are processed and tracked through iMIS AR/Cash. This window should only be used for transactions that are not processed indirectly through another module.

The purpose for entering data on this window is to record after-the-fact any sales-related transactions, such as manually prepared invoices. iMIS uses the information entered on this window to track several items:

- Product sales items that are passed on to sales history.
- Any outstanding AR amount.
- Any open AR amount that is reduced or eliminated, which is reported on daily and monthly transaction reports.

Use sales transactions to record miscellaneous sales and cash receipts that do not fit into any category processed by other iMIS modules, such as Billing, Events, and Order Processing.

Use sales transactions for sales-related entries when you do not need to produce an invoice or a bill. For example, enter sales transactions to record open sales items for a manual (handwritten) invoice and to document paid-in-full transactions without a printed invoice (miscellaneous cash receipts).

To record sales transactions

1. From Enter and edit sales transactions window, click New.
2. Enter the customer Id and press Enter, or use the lookup icon to select a value and click OK.
3. Place the cursor in the Product field and use the lookup icon.
4. Select a value. Press OK.
5. (optional) Place the cursor in the GL Account field and enter or change the GL account number. If the Allow GL Account Edit for Sales Transactions option is not enabled (from AR/Cash, select Set up module), the GL Account field is display-only and the GL account number cannot be added or changed.
6. Place the cursor in the Quantity field and enter the Quantity.
7. Place the cursor in the Check/CC field and enter the check or credit card information.
8. Enter the payment amount in the Payment Amount field.
9. Click Save.

To edit existing sales transactions

To edit a transaction that is still in the system, find the transaction, select edit mode, and make the necessary changes.

Note: You cannot edit transactions that are in a posted or closed batch or transactions that have been transferred to the GL.

You can search for an existing transaction using any of the first three heading fields. After the search, iMIS either displays the transaction you requested or presents a list of transaction options.

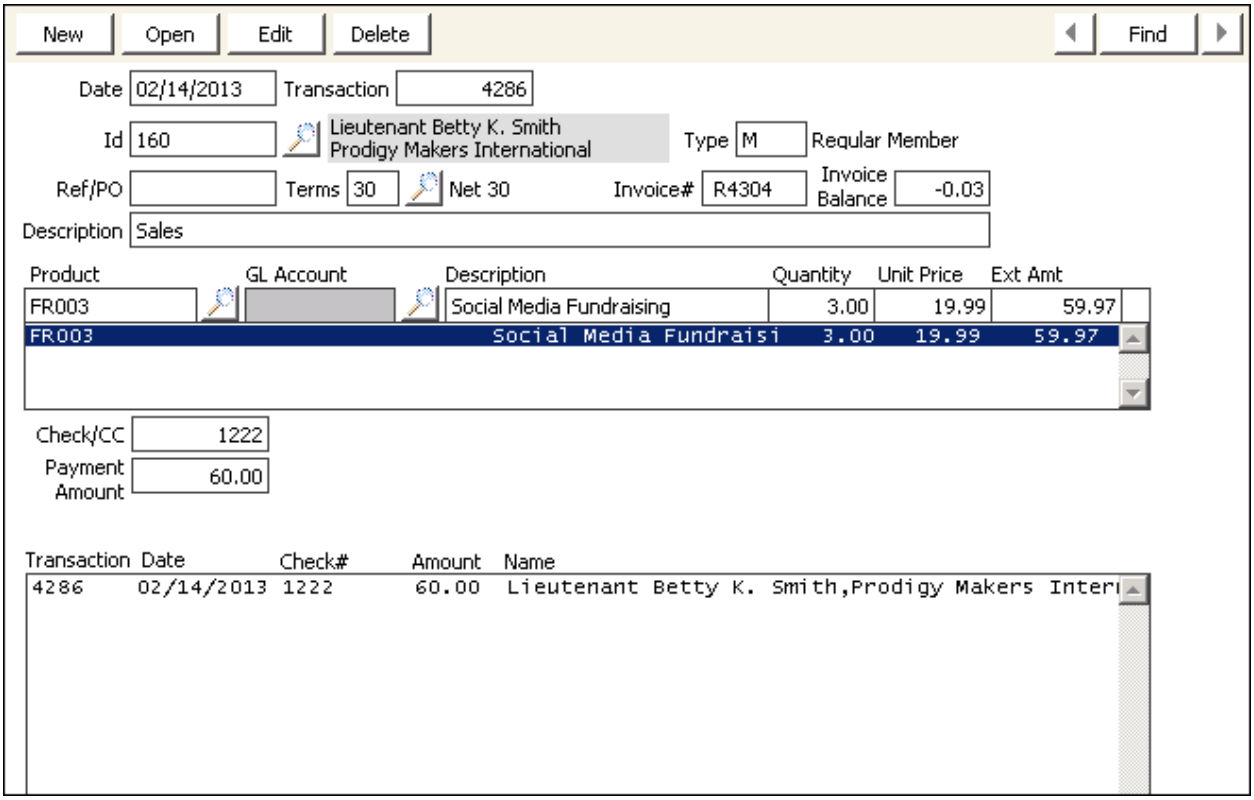
Note: iMIS only searches on one field at a time.

1. From Enter and edit sales transactions window, click Open.
2. Enter a value into one of the first three data entry fields (Date, Transaction, or Id) and press Enter.

- If iMIS finds your record, then iMIS opens the record in display mode.
- If iMIS finds multiple transactions matching your criteria such as date or ID, it returns a list of potential matches. Double-click on the desired line to open the record in the display mode.

3. Click Edit.
4. Make the necessary changes.
5. Click Save.

Enter and edit sales transactions window



Admin Console: Accounting > Transactions > Enter and edit sales transactions
Desktop: AR/Cash > Enter and edit transactions > Sales transactions

Date

iMIS automatically enters the current system date (or the date entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to return to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date and cannot be overridden.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Id

Enter the customer ID that relates to the sale, or click Find to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Ref/PO

Enter the customer's purchase number or other reference number that should appear on the invoice. The reference/purchase order value will display on the AR statement.

Terms

(optional) Enter the code for the type of sale terms that apply to this invoice, or click Find to select a value.

Invoice #

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

Invoice Balance

(read only) Running invoice balance automatically updated by iMIS.

Description

Enter the invoice description. This description prints or displays on key reports and creates output, such as statements, trial balances, and account status displays.

Product

Enter a valid product code from the Set up product codes window, or use the lookup icon to select a value.

GL Account

Automatically populated with the GL account number if a GL account number is defined for the product. If the Allow GL account edit for sales transactions option is enabled (go to Accounting > Options > Configure accounting options), you can enter a GL account number if the GL Account field is blank or enter a different GL account number if the GL Account field is populated.

If a GL account number is not defined for the product and you leave the GL Account field blank, the GL Account field is automatically populated with the default Income Account for the transaction's owner entity.

If the Allow GL Account Edit for Sales Transactions option is disabled, this field is display-only and the GL account number cannot be added or changed.

Description

Automatically entered by iMIS, but can be overridden manually.

Quantity

Enter the Quantity of the product being sold. This quantity is applied against the unit price to arrive at the extended amount.

Enter quantities as whole numbers unless you are designating time or other partial quantities. For time or other partial quantities, enter fractions as decimals: (for example, enter 1.5 for 1-1/2)

Unit Price

iMIS automatically fills in the Unit Price if a product price has been defined on the Product Code window.

To override this price, click on the field (or press Shift+Tab to return to the Unit Price field), and enter a new value.

Ext Amt

(read only) iMIS automatically calculates the extended price.

Check/CC

If the payment is made by check, enter the check number. If the payment is made by credit/debit card, enter the abbreviation for the credit/debit card.

To apply a credit balance to an item, enter an asterisk (*) in the Check/CC field and press Tab. Select the credit from the drop-down list on the Select Open Payments window (you can toggle between viewing the individual's available credits and all available third-party credits by clicking the Indiv./All toggle button) and click OK. Enter the credit amount in the Payment Amount field.

Note: Most *Tab transactions generate extra transfer lines to provide the proper audit trail for both invoice summary lines involved in the transfer and to offset each other to provide a net effect of zero.

AR credit card codes should already be set up on the Set up cash accounts window.

If you enter a valid credit/debit card code, additional payment fields display:

- CC # – Enter the credit/debit card number.
- CSC – (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp – Enter the card's expiration month and year (mm/yy).
- Authorize – Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC – Enter the name as it appears on the payment card.
- Issue # – (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date – (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).
- Gateway Ref # – Read only: Populates when the gateway provider returns the reference number for the transaction.

  Note: If Advanced PCI Compliance (see Implementing Advanced PCI Compliance options) > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Payment Amount

  Enter the payment amount, whether the payment is made by check or credit/debit card.

  Transaction list

  Displays the transaction date, check number or credit/debit card type, transaction amount, and customer name.

Search credit card info

After you enter credit/debit card transactions, search iMIS for transactions using the Credit Card #, the customer Id, the Trans Number, or any combination of these criteria.

Unencrypted card information can be viewed in this window only if a user has an AR/Cash authorization level of 8 or higher.

Note: If Advanced PCI Compliance (see Implementing Advanced PCI Compliance options) > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

To search credit/debit card transactions

1. From the Search credit card info window:

- Select the Last Four option to search on the last four numbers of the credit/debit card.
- Select the Full option to search on the full card number.

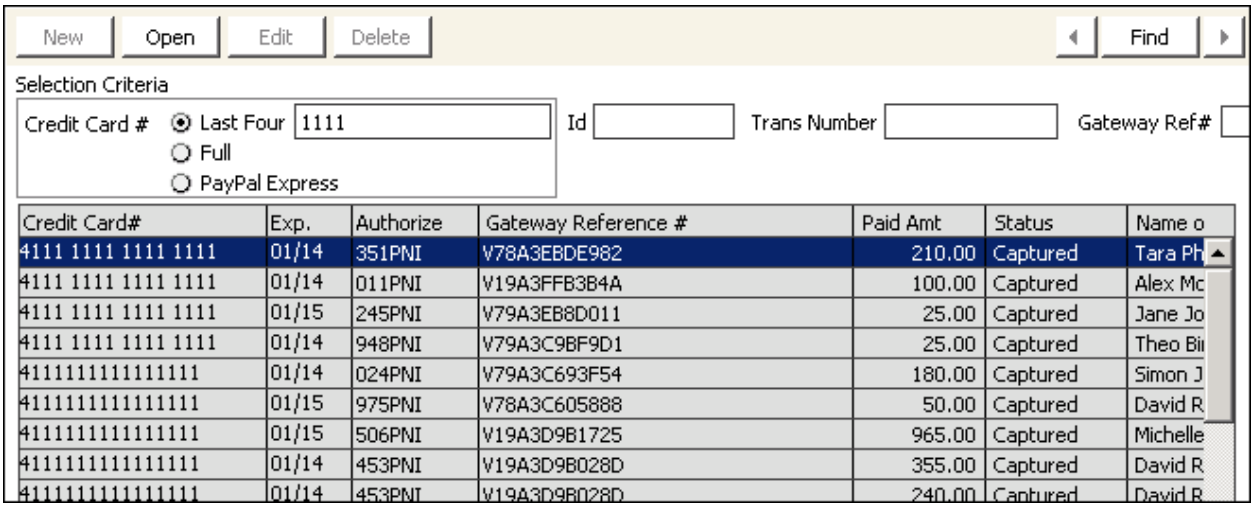
   Note: If Advanced PCI Compliance (see Implementing Advanced PCI Compliance options) > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields. Therefore, the Full option is disabled, because only the last four credit card digits are saved.

2. Enter the card number in the Credit Card # field to search for a specific card number.
3. Enter the customer or company ID in the Id field to search by record. You search by both the card number and ID, or by one field only.
4. Enter the transaction number in the Trans Number field to search by transaction number.
5. Press Enter. A list of transactions for the selected card and/or customer record displays in the window.
6. To view an individual transaction through the Search credit card info window, double-click the line item. The original transaction window opens.

Troubleshooting

- The Status field is populated by Trans.STATUS for transactions entered through Service Central and iBO.
- When entering an order and paying by credit card over the web, the order must be processed to the invoice stage before it will display in the Search credit card info window.
- When viewing credit card transaction status, the details of the transaction are shown, not the details of the actual order payment or the event payment.

Search credit card info window



Credit Card #

The credit/debit card number associated with the search

Id

The customer or company ID whose credit/debit card transactions are associated with the search

Display fields

- Credit Card # – The card numbers associated with the search.
- Exp. – The expiration date for each card number.
- Authorize – The authorization code for the card transaction.

- Gateway Reference # – (Read only) Populates when the gateway provider returns the reference number for the transaction.
- Paid Amt – The amount paid with the card transaction.
- Status – This field indicates the authorization status of the transaction. The status options are: A (authorized), D (deferred), and C (captured). If this field is blank, it is either a manual transaction or the transaction was denied.
- Name on Credit Card – The name on the card associated with the transaction.
- Id – The ID associated with the card transaction.
- Source – This field indicates the module source for the card transaction. For example, if the payment were a fundraising gift, FR would display in this field.
- Ref # – A transaction number or order ID that is generated by the authorization gateway. This information is stored in the Description field of the transaction entry, and must be referenced in order to delete any transactions.
- Ref Date – Specifies the date the transaction was entered in iMIS.

Processes

Manage batches

The Manage batches window enables you to perform several different batch functions:

- Create new batches
- View/list existing batches
- Control which batches display on the window
- Print and post existing batches

Note: If iMIS is configured to hide batches created by other users, you can view only your own batches, unless your logon's authorization level for AR/Cash is 8. This restriction applies to batches that are created automatically by iMIS or by importing transaction data.

This window displays a table of the batches that are available to you and the commands for editing and managing them. The authorizations (see Authorization level privileges (Desktop)) and credentials of each user record (see Creating iMIS user records) control what aspects of this feature can be seen and used.

Note: The batches that are available to you depend upon the authorization level and access keywords assigned to your login, and the batch control options that the administrator has selected for your site.

Note: The Manage batches and Open Batches windows are equivalent. The Manage batches window appears only in Accounting. The Open Batches window appears when (a) you are in an iMIS module other than Accounting and (b) no open batch is selected when you attempt to enter or edit a transaction.

Note: System-generated batches are designed to be posted unmodified. When you edit a system-generated batch, or add transactions to a system-generated batch, you must designate a cash account for the batch before your changes can be saved, and before the batch is posted.

Note: Window items that are self-explanatory for the typical users of this window are not described.

To create a new batch

1. From Manage batches, click New.
2. Enter the batch information.

   Note: You must designate a cash account type in the Cash Table field before you can save a new batch.
3. Click Save.

Selecting an open batch

If you enable batch control, a batch must be selected before you can process transactions. If you do not select a batch after starting an iMIS session, the Open Batches window opens automatically when you attempt to insert or edit a transaction, so that you can

select an open batch. After you select an open batch or create a new batch, the batch remains selected until you select a different batch or exit iMIS.

You can only edit transactions for the currently selected batch. If you try to edit a transaction that was entered in another batch, iMIS prompts you to switch to the originating batch.

To select an open batch

1. Open the Manage batches window.
2. In the batch table, double-click a batch to select it.
3. (optional) Click View Batch. The Batch window opens, in the lower-left corner of the page.
4. Close the Manage batches window.

To find a specific open batch

1. From Manage batches, click Find. The Batch field becomes available for data entry. All other fields remain unavailable.
2. Enter as many characters as required to identify the batch.
3. Press Tab. iMIS highlights the first batch that matches the characters entered.
4. Repeat steps 3 and 4 as desired.
5. Click Save. iMIS cancels the find and populates the fields on the right side with the highlighted batch's data.

To print batches

After you have entered all of the transactions for a batch or group of batches, click Print Selected or Print Open to print the batch transaction report, where you can review the batch details and check the batch balancing

From the Manage batches window:

- To print a report for a selected batch, select the batch and click Print Selected.
- To print reports for all open batches, click Print Open.

The batch report lists the detail of each transaction entered and lets you compare the actual figures against the control totals, warning you if they are different. The report also provides a GL accounting summary report.

Posting batches

After you finish your batch transaction work and have verified that the information is accurate and in balance, complete the process by posting the batch. Until you post the batch, you can make changes edit or delete any transaction within the batch (even if you are using the hot posting feature).

Note: If your administrator has selected Require balanced batches for posting (see AR/Cash Batch Control window), iMIS will not post a batch unless both the control amount equals the actual amount, and the control count equals the actual count. When you click Post Ready or Post Selected on the Manage batches window and a batch is unbalanced, iMIS displays an error message and does not post the batch.

To post a single batch

1. From Manage batches window, select the batch to be posted.
2. Click Post Selected. A warning window asks you to confirm that you want to post the batch.
3. Agree to post the batch. For each batch posted, iMIS prints the final detail and summary batch transaction report and marks the batch as Posted or Closed.

   Note: After a batch is closed, you cannot add, modify, or delete any transactions in that batch.

To post a group of batches

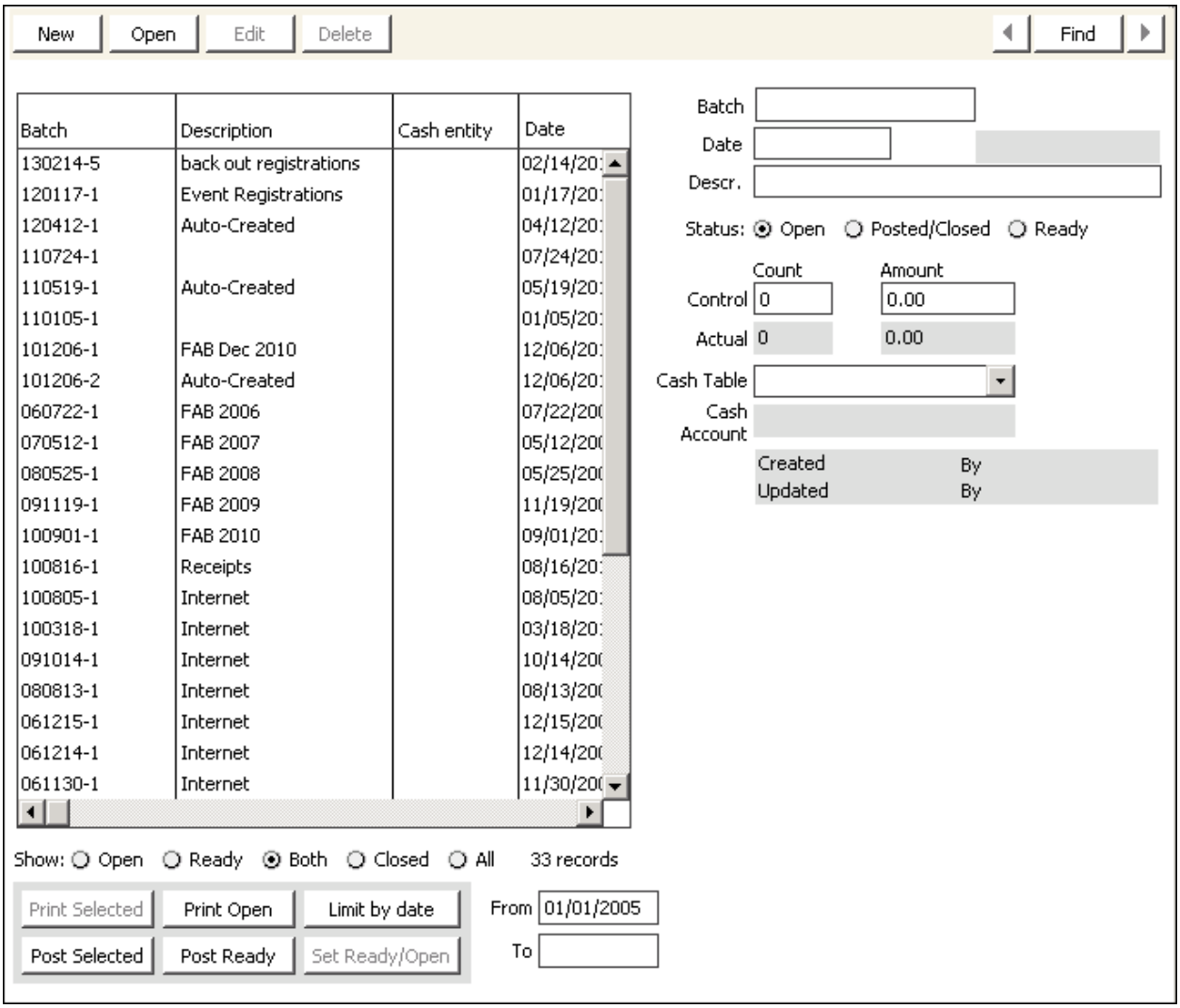
1. From the Manage batches window, choose the Show: Both option beneath the batch list. This will filter the batches to show only those with an Open or Ready status. Ready batches are ready for posting.
2. Ensure that any batches you want to post have a status of Ready:

1. Select an Open batch.
2. Click Set Ready/Open.
3. Repeat for each Open status batch that you want to post.

3. Ensure that any batches you do not want to post do not have a Ready status:

1. Select a Ready batch.
2. Click Set Ready/Open.
3. Repeat for each Ready batch that you do not want to post.
4. Click Post Ready. A warning window asks you to confirm that you want to post the batches.
5. Agree to post the batches. All batches with a Ready status are posted.

Manage batches window



Admin Console: Accounting > Processes > Manage batches
Desktop: AR/Cash > Manage batches

Batch table

This table displays the batches that are available to you. You can sort the batch table by clicking on the column headings. The batch table includes these columns:

- Batch – The batch available for selection.
- Description – Description of the batch.
- Cash entity – Specifies the entity that owns the cash account for the cash received.

- Date – Specifies the transaction date of the batch.
- Date created – Specifies the date that the batch was created.
- Created by – Specifies by whom the batch was created.
- To GL – Specifies whether at least one transaction in the batch has been exported to the General Ledger.
- Status – The current status of the batch.
- Last updated – Specifies the last date that a change was made to the batch status or transactions in the batch.
- Updated by – Specifies by whom a change was made to the batch status or transactions in the batch.
- Event – When a user registers for an event over the Web, a batch is created automatically.
- Meeting – (if enabled) Specifies whether the batch is closed when the corresponding meeting is closed.

  If the table contains too many batches to view easily, filter the table with the display controls.

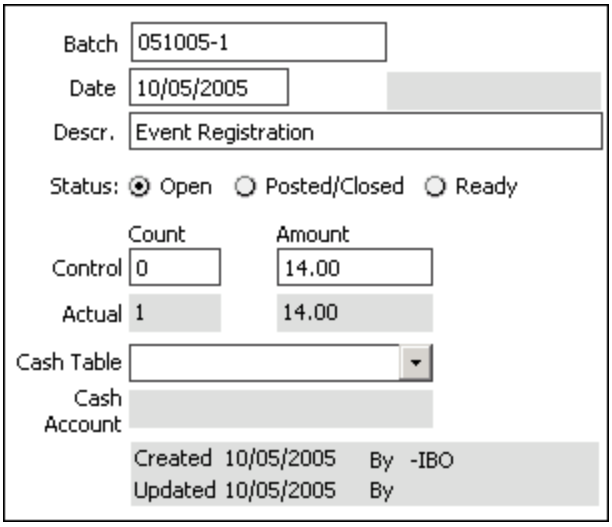
  Batch table display controls
- Open – Open batches are open and in process.
- Ready – Ready batches are ready for posting.
- Both – Displays both open and ready batches.
- Closed – (if enabled) Displays only closed/posted batches.
- All – (if enabled) Displays all of the batches that are available to you.

  Batch controls
- Print Selected – Prints a transaction report for all selected batches
- Print Open – Prints a transaction report for all open batches

- Limit by date – Displays only batches with creation dates that fall between the dates in the From and To fields
- Post Selected – Posts the selected batch

  Note: To post a batch, the sum of all transaction debits in the batch must equal all transaction credits. In addition, your login must have an authorization level of 4 or higher.
- Post Ready – Posts all ready batches
- Set Ready/Open – Changes the status of the selected batch from open to ready, or from ready to open
- View Batch – Displays the Batch window, which remains open in the area below the task list when you switch to different iMIS modules.

  Batch creation/editing



  The Manage batches window data edit/entry area

- Batch – (read-only, unless batch auto-numbering is not enabled) The unique identifier of this batch. (if no auto-numbering) For new batches, you must specify this identifier (maximum of 15 characters).
- Date – The accounting date of all transactions in this batch. For new batches, the default is the current system date.

- Descr. – The description of this batch (maximum of 60 characters).
- Status – (read-only, except authorization level 8) The status of this batch.
- Open – Entry/editing/balancing of data is in progress. Authorized users are allowed to add or modify transactions in this batch, and to change the status to Ready.
- Posted/Closed – All entry/editing/balancing of data is finalized. No users are allowed to modify transactions in this batch, but authorized users can change the status of this batch to Open or Ready.
- Ready – Temporary transition between Open and Posted/ Closed. A batch should only be marked Ready if it is balanced and ready for posting individually or in a group. No users are allowed to modify transactions in this batch but authorized users can change the status of this batch to Open or Posted/ Closed.
- Control Count – The maximum number of transactions this batch can contain.
- Control Amount – The total value of cash receipts or deposits that can apply to this batch. This enables you to validate the batch balance after data entry.
- Actual Count – (read-only) The current number of transactions in this batch.
- Actual Amount – (read-only) The current total value of all transactions in this batch. As you enter transactions, the system keeps an internal count of accumulated transactions.
- Cash Table – The cash account code to which all cash receipts in this batch are assigned.

  Note: This field is required for all user-created batches, even if you only have one cash account, and even if you do not process any cash receipt transactions in this batch.

  Note: If you edit a batch to change the cash account, only receipts entered after you save will reflect the new account and associated GL account information.
- Cash Account – (read-only) The GL account associated with the selected Cash Table value.

  Batch window

The Batch window displays information about the current open batch, and provides a button for selecting a different open batch.

This window specifies the following information.

- Batch – The name and description of the current open batch
- Control – The control count and control amount
- Actual – The actual count and actual amount
- Diff – The differences between the control and actual values
- Select Batch – Displays the Open Batches window

Process month-end procedures

Note: Several configuration options on the Process month-end procedures window are documented within the iMIS Desktop. Links in the following sections might display iMIS Desktop documentation. This saves you time and effort when configuring month-end procedures.

There are several month-end procedures associated with AR/Cash.

From Process month-end procedures, complete one of the following month-end procedures:

- Create a GL journal
- Create credit invoices

- Implementing mass write-off of debit/credit balances
- Schedule deferred income records

Note: After all transactions have been entered for a month, all batches for the month should first be posted before creating the GL journal, creating credit invoices, and purging old invoices and transactions.

Note: See Deferred Income in iMIS.

Create GL Journal

Note: This feature is available only if you are licensed for General Ledger Interfaces.

The GL Journal feature allows you to transmit your cumulative iMIS-generated accounting transactions to the GL module monthly or more frequently.

Before exporting your GL journal data, print an audit trail report. Go to Continuum > Commerce and Customer Service Reports > Accounting Reports. Select Transaction Lists from the Report Types drop-down list to review what you are about to export. The appropriate report choice may depend upon the summary level you selected for the GL interface entry. If you summarize at the monthly level, a recommended selection is Transaction Lists from the Report Types drop-down list and then the AR/Cash Distribution Summary report from the Available Reports drop-down list. You should also print a trial balance by selecting Account Status from the Report Types drop-down list and Trial Balance from the Available Reports drop-down list.

When the GL interface is run, the following actions are performed:

- Entries are created to move deferred income to current income
- Due To-Due From tables are created as needed
- The transaction posting flag is set so that the transaction cannot be posted again

Note: For more on the GL Journal feature and specific GL packages, see General Ledger Interfaces.

Transaction lists report format

Transaction lists reports include the following:

- AR/Cash Daily Distribution Summaries – Provides an accounting entry recap by day for each of the days included in the Select Date Range window.
- AR/Cash Distribution (Detail or Summary) – Lists entries generated throughout all iMIS modules, sorted by pseudo-account number and listing actual GL account numbers, if assigned.
- AR/Cash Transactions – Yields the same format as the transaction journal, but prints transactions generated throughout all iMIS modules. Like the AR/Cash journal, this report lists detail audit trails of transactions and a summary report by GL account (or pseudo GL account). It lists any transactions not purged in the specified date range.

To run the Transaction Lists Distribution Summary

The Transaction Lists: AR/Cash Distribution Summary report provides a simple summary by GL account number. If there is anything wrong (such as invalid account numbers), you can address these errors before proceeding.

1. Go to Continuum > Commerce and Customer Service Reports > Accounting reports.
2. Select Transaction Lists from the Report Types drop-down list.
3. Select AR/Cash Distribution Summary from the Available Reports drop-down list.
4. Click Set Report Destination and select a report destination (for example, printer, screen, or file).
5. Select any desired options (for example, margins) from the Options drop-down menu.
6. Click Run.
7. The AR/Cash Distribution Summary: Select Date Range window displays. Enter the date range of the transactions to include in the GL interface entry.
8. Click OK.

To create the GL Journal

1. From Process month-end procedures, click Create GL Journal. A message appears requesting verification of the request.
2. Click Yes. The General Ledger Interface: Select Date Range window appears.
3. Enter the date range of the transactions to include in the GL interface entry.
4. Click OK. The search will not include any previously exported transactions, regardless of the date. If iMIS finds qualified transactions, iMIS displays a message identifying your GL package.
5. Click Yes.

Credit Invoices

The credit invoices feature identifies and lists all AR items with a current credit balance. It provides the necessary options to select and process credit items for refund.

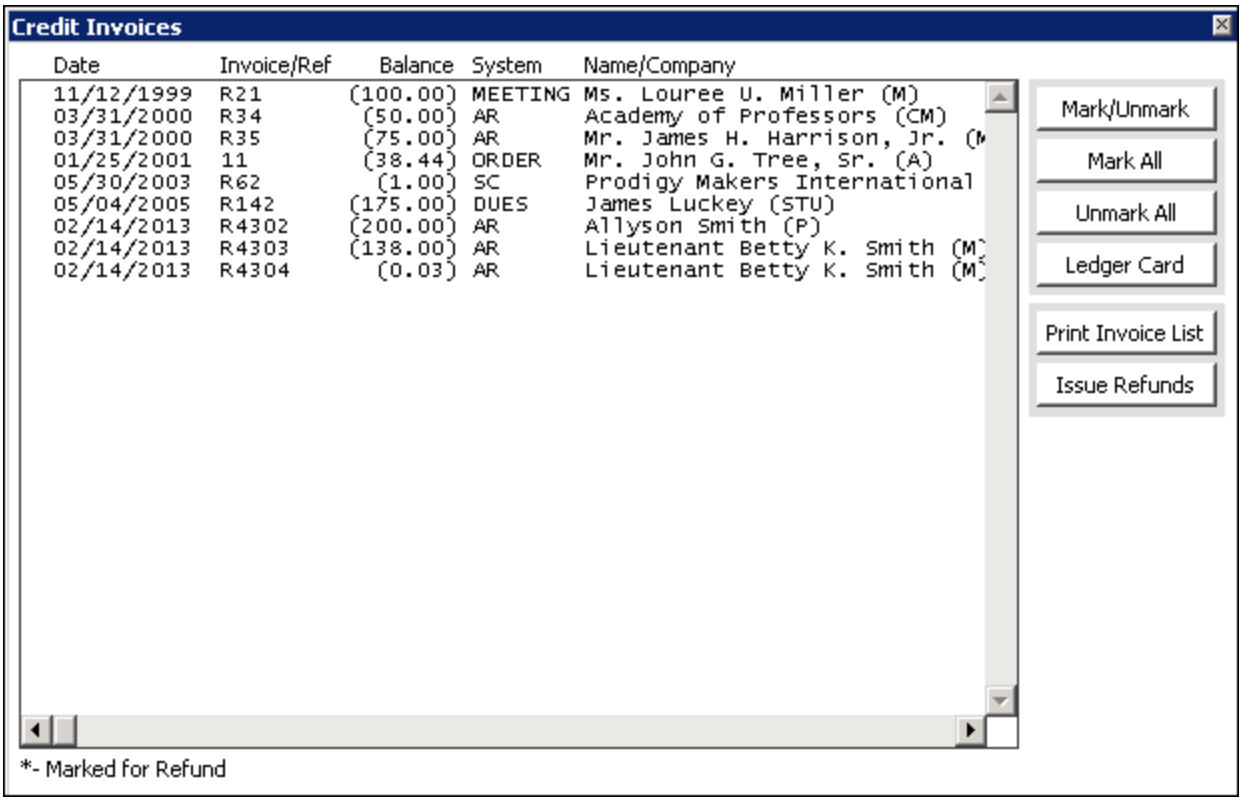
Before using the credit invoices feature, you must assign a refund clearing account for all appropriate entities on the AR/Cash Default Accounts window (go to Accounting > Options > Configure accounting options, and then click Default Accounts). Assign a default account number in the Refund Clearing field.

The Refund Clearing account represents a bridge or clearing account between AR and AP. Use the Refund Clearing account for the debit distribution entries in the AP entries in the same manner that you use the clearing account for the credit side of the AR reversal entries.

To create credit invoices (refunds), use the Credit Invoices window. From Process month-end procedures, click Credit Invoices. You can use the Credit Invoices window to perform the following tasks:

- View credit items
- Mark credit items for refunds
- Print the list of open invoice credits
- Issue refunds

Credit Invoices window



- Credit Invoices scrolling list – This area contains a list of all credit invoices, including Date, Invoice/Ref, Balance, System, and Name/Company. Each item is labeled with the initial transaction date, invoice or reference number, credit balance, source system, and customer/customer name.
- Mark/Unmark – Select to mark individual items for refund, which is indicated by an asterisk at the far left. The button toggles (turns off or on) the marking of any selected items.
- * = marked
- (no *) = unmarked
- Mark All – Select to mark all items for refund. Click the Mark/Unmark button to individually unmark each item you do not want refunded.
- Unmark All – Select to unmark from all items.
- Ledger Card – Select to view an item's transaction detail or ledger card history on the Transaction Ledger window. To display this detail, double-click on a line item, or click on

a line item and click Ledger Card.

- Print Invoice List – Select to print a report of credit items, including initial transaction date, reference or invoice number, source system, general item description, total charges, total credits and resulting (credit) balance, and the customer ID and name.
- Issue Refunds – Select to reverse the balances (for the marked items only) by generating the necessary debit-adjusting entries and print a report documenting the refunds (reversals).

  The entries debit the appropriate AR account for the full balance and credit the default refund clearing account.

  In a multiple-entity situation, the owner entity for the generated transaction is assigned according to the owning entity of the initial sales-related transaction. iMIS appropriately uses AR from the initial transaction, and uses the refund clearing account from the default tables for the owning entity.

  Note: Use the generated report as the basis for the refund items, which should be processed in AP. The refund clearing account should be entered as the AP offset or distribution account, bringing the net effect on the clearing account to zero.

Credit/Debit Write-Offs

The Accounting module allows you to perform a mass write-off of debit/credit balances based on a user-defined cutoff date and a maximum dollar amount.

The system setup options for this feature include an option that allows you to define the maximum default dollar amount to write off. During the write-off process, all debit or credit balances less than or equal to this amount are written off. You can overwrite this default during the actual write-off process.

A default GL account number, entered on the AR/Cash Default Accounts window, that offsets the credit or debit created by the write-off process will be written. For example, if you write off credit balances, iMIS creates a debit to the default AR account and a credit to the write-off offset account specified on the AR/Cash Default Accounts window.

To set the default write-off amount

1. Go to Accounting > Options > Configure accounting options.
2. Click Edit.
3. Enter a default dollar amount in the Default cut off amount for write-offs field.
4. Click Save.

To enter the default write-off offset account

1. Go to Accounting > Options > Configure accounting options.
2. Click Default Accounts to open the AR/Cash Default Accounts window.
3. Click Edit.
4. Enter the GL account number to which you will be recording the write-offs in the Write-off/Offset field.
5. Click Save.

To process mass write-offs

1. From Process month-end procedures window, click Credit/Debit Write-Offs to open the Credit/Debit Invoices Write-Off window.

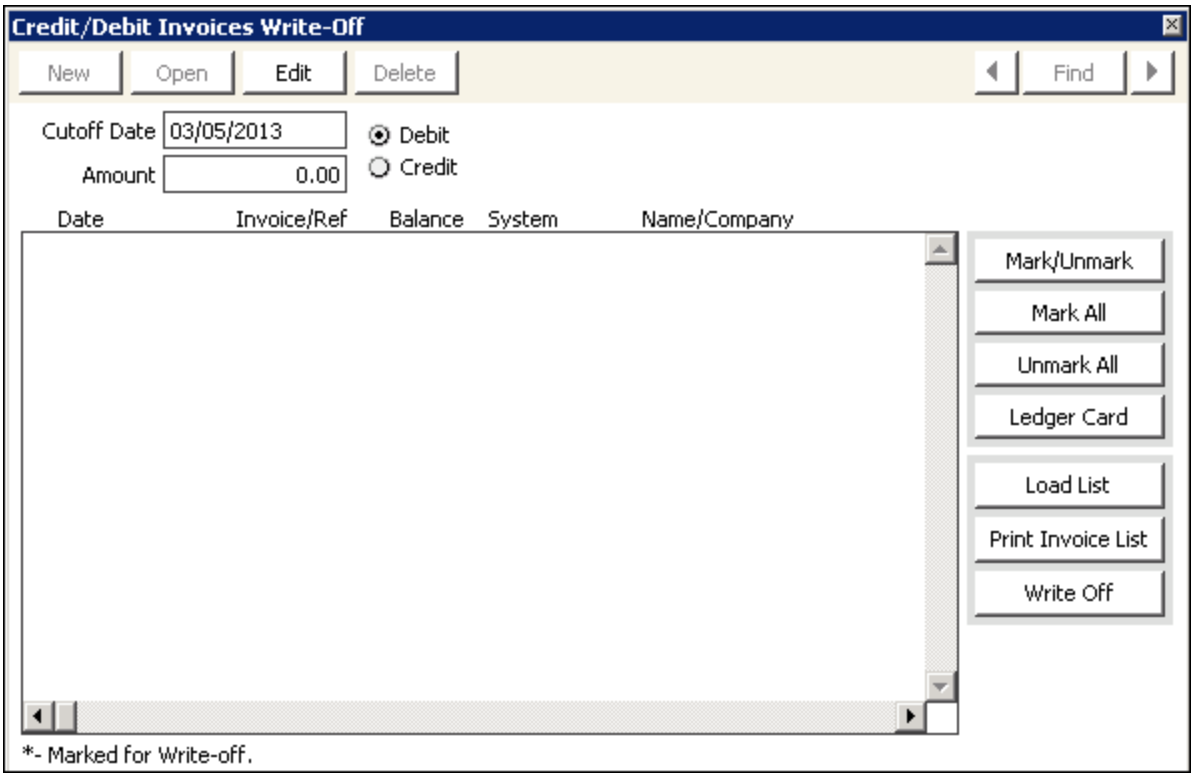
   Note: The Cutoff Date field defaults to the system date and the Amount field defaults to the amount specified on the Configure accounting options window. You can overwrite either or both of these fields as needed. iMIS writes off all debit or credit balances where the INVOICE_DATE is equal to or older than the date specified in the Cutoff Date field and the balance is equal to or less than the amount specified in the Amount field.
2. Enable Debit or Credit and click Load List. A list of all records that meet the Cutoff Date and Amount criteria are displayed. Select these records for write-off by:

- Selecting an individual record by selecting the item and clicking Mark/Unmark.
- Selecting all records by clicking Mark All.

3. If you need to view the detail for an item, select the item and click Ledger Card. The Transaction Ledger window displays the balance details.

4. Print a list of all displayed items by clicking Print Invoice List for an audit report before processing the actual write-offs.
5. After you verify that the records selected for write-off are correct, click Write Off on the window to process the actual write-offs.
6. You can view the results of the write-off on the customer's Transaction Ledger window.
7. Click Find.
8. Enter the ID for the customer who had the write-off applied to their account.

Credit/Debit Invoices Write-Off window



- Cutoff Date – The Cutoff Date field defaults to the system date. You can overwrite this field as needed.
- Amount – The Amount field defaults to the amount specified on the Configure accounting options window. You can overwrite this field as needed.
- Debit – Enable this option to see Debit invoices.
- Credit – Enable this option to see Credit invoices

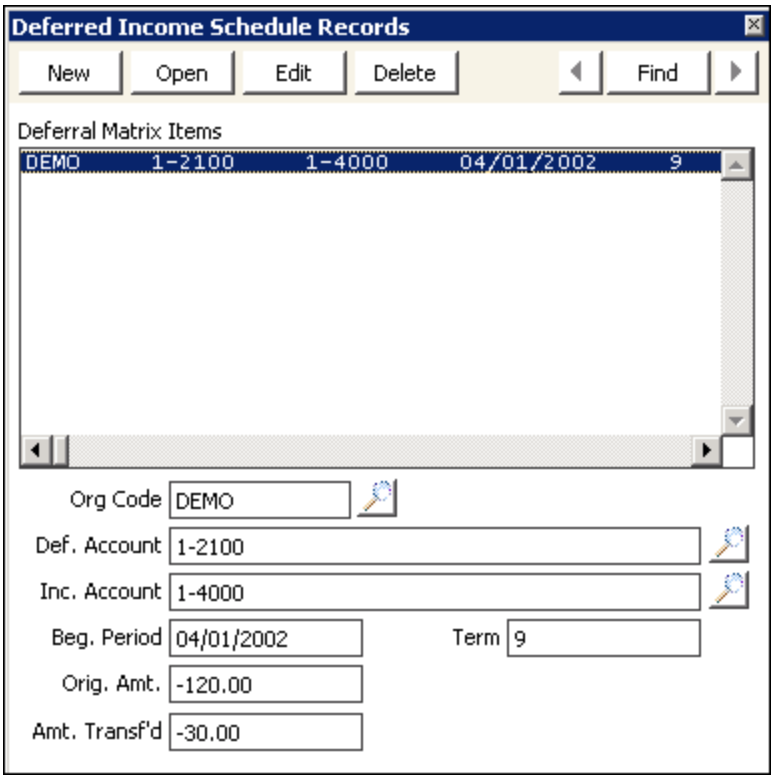
- Mark/Unmark – Select to mark individual items for refund, which is indicated by an asterisk at the far left. The button toggles (turns off or on) the marking of any selected items.
- * = marked
- (no *) = unmarked
- Mark All – Select to mark all items for refund. Click the Mark/Unmark button to individually unmark each item you do not want refunded.
- Unmark All – Select to unmark from all items.
- Ledger Card – Select to view an item's transaction detail or ledger card history on the Transaction Ledger window. To display this detail, double-click on a line item, or click on a line item and click Ledger Card.
- Print Invoice List – Select to print a report of credit items, including initial transaction date, reference or invoice number, source system, general item description, total charges, total credits and resulting (credit) balance, and the customer ID and name.
- Write Off – Click to process the actual write-offs.

Deferred Income Records

To build the initial deferral matrix

1. From Process month-end procedures, click Deferred Income Records to open the Deferred Income Schedule Records window.
2. To build the table, you must create one entry for each combination of Deferred Account – Income Account – Beginning Period – Term (number of months).
3. Click New.
4. Enter data into the Org Code, Def. Account, Inc. Account, Beg. Period, Term, Orig. Amt., and Amt. Transf'd fields, or click the Find icon to select a value.
5. Click Save.

Deferred Income Schedule Records window



To build the deferred income matrix initially, use the Deferred Income Schedules Records window. This window contains the following fields:

- Find – Select to find a deferred income entry. You can specify the Org Code, Def Account, Inc Account, Beg Period, Term, Orig Amt, or Amt Transf'd of the deferral income entry for the search. The first deferral income entry that matches the search criteria will be selected.
- Deferral Matrix Items – The list of existing deferred income entries is displayed in this scrolling list.
- Org Code – Enter the organization or entity code as established on the Organization Names window (select File> System Setup), or use the lookup icon to select a value.
- Def. Account – Enter the GL deferred income (liability) account number to which the original amount was initially posted (to await subsequent recognition and transfer to regular income), or use the lookup icon to select a value.

- Inc. Account – Enter the GL income account to which the amounts will be transferred as the income is earned and recognized, or use the lookup icon to select a value.
- Beg. Period – Enter the accounting date (typically month, first day of the month, year) either for which the income was initially recognized or will be recognized (Conversion method 1), or for which you want iMIS to begin generating the necessary transfer entries to recognize income and reduce deferred income (Conversion method 2).
- Term – Enter the number of months over which the original amount is to be recognized as income. This may be the original term (Conversion method 1), the net number of months remaining within the original term for which income is yet to be transferred, or 1 (Conversion method 2).
- Orig. Amt. – Enter the total dollar amount that will be recognized in prorated monthly amounts over the term of the deferred income item. Because deferred income accounts carry a credit balance, enter only negative amounts (enter a minus sign followed by the digits that represent the amount).

  This field should contain one of the following:

- Original amount posted in the starting month to this deferred income/regular income/term combination (Conversion method 1)
- Net amount remaining to be recognized over the remainder of the term (Conversion method 2)
- Total amount of the existing deferred income balance to be transferred from the deferred income account identified to the regular income account identified for the single-month term (Conversion method 2)
- Amt. Transf'd – Enter the dollar amount portion of the original amount already recognized in previous periods. As with the original amount, the amount transferred must be represented by a negative amount. (This field should only be used when using conversion method 1. See “Conversion Methods for Building the Initial Matrix”.)

Adjustments

Enter and edit credit memos

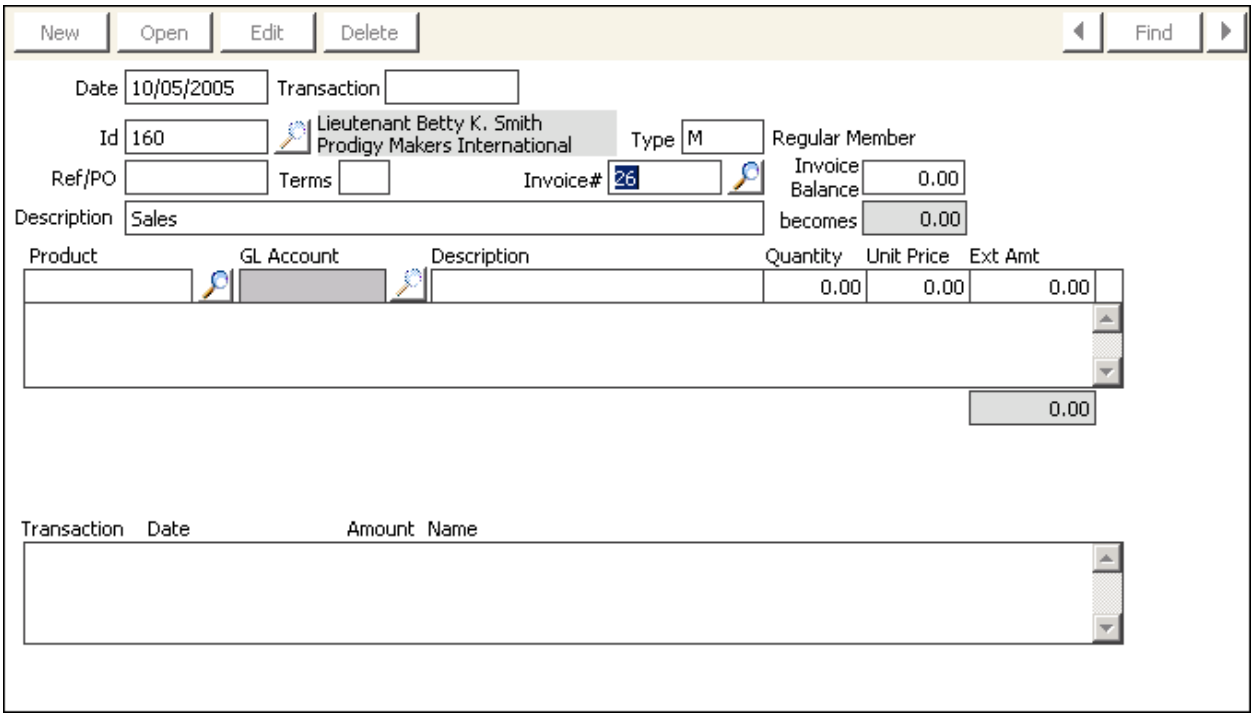
To apply credit memos to multiple funds

To apply credit memo adjustments to multiple funds for a split gift, use the Enter and edit credit memos window.

1. From the Enter and edit credit memos window, click New.
2. Enter the donor ID in the Id field, or click the lookup icon to select a donor ID.
3. Enter the transaction number in the Invoice# field and press Tab, or press Ctrl+L to look up a transaction number. The split gifts per fund pertaining to this gift or pledge display.
4. Enter the distribution or premium code in the Product field, or click the lookup icon to select a distribution or premium, and press Tab.

   Note: If more than one distribution is assigned to the same fund, only one line displays for the fund, showing the combined charges for these distributions. You must know the distribution or premium code that you wish to adjust and its value per the installment invoice.
5. Enter 1 in the Quantity field.
6. Enter the credit memo adjustment amount in the Unit Price field.
7. (optional) Repeat to apply a credit memo adjustment to additional distributions or premiums.
8. Click Save.

Enter and edit credit memos window



Admin Console: Accounting > Adjustments > Enter and edit credit memos
Desktop: AR/Cash > Enter and edit transactions > Credit memos

Date

iMIS automatically enters the current system date (or the date you entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to return to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date and cannot be overridden.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Id

Enter the customer ID that relates to the sale, or use the lookup icon to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Ref/PO

Enter the customer's purchase number or other reference number that should appear on the invoice. The reference/purchase order value will display on the AR statement.

Terms

(optional) Enter the code for the type of sale terms that apply to this invoice, or use the lookup icon to select a value.

Invoice#

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

Invoice Balance

(read only) Running invoice balance automatically updated by iMIS.

becomes

(read only) Invoice balance after the credit adjustment (only displays when you click New).

Description

(read only) This description is populated by the description in the invoice to which the credit memo is related.

Product

Enter a valid product code from the Set up products window, or use the lookup icon to select a value.

GL Account

Automatically populated with the GL account number if a GL account number is defined for the product. If the Allow GL Account Edit for Sales Transactions option is enabled (go to Accounting > Options > Configure accounting options), you can enter a GL account number if the GL Account field is blank or enter a different GL account number if the GL Account field is populated.

If a GL account number is not defined for the product and you leave the GL Account field blank, the GL Account field is automatically populated with the default Income Account for the transaction's owner entity.

If the Allow GL Account Edit for Sales Transactions option is disabled, this field is display-only and the GL account number cannot be added or changed.

(Product) Description

Automatically entered by iMIS, but can be overridden manually.

Quantity

Enter the Quantity of the product being sold. This quantity is applied against the unit price to arrive at the extended amount.

Enter quantities as whole numbers unless you are designating time or other partial quantities. For time or other partial quantities, enter fractions as decimals: (for example, enter 1.5 for 1-1/2)

Unit Price

iMIS automatically fills in the Unit Price if a product price has been defined on the Product Code window.

To override this price, click on the field (or press Shift+Tab to return to the Unit Price field) and enter a new value.

Ext Amt

(read only) iMIS automatically calculates the extended price.

Transaction list

Displays the transaction date, check number or credit card type, transaction amount, and customer name.

Enter and edit debit memos

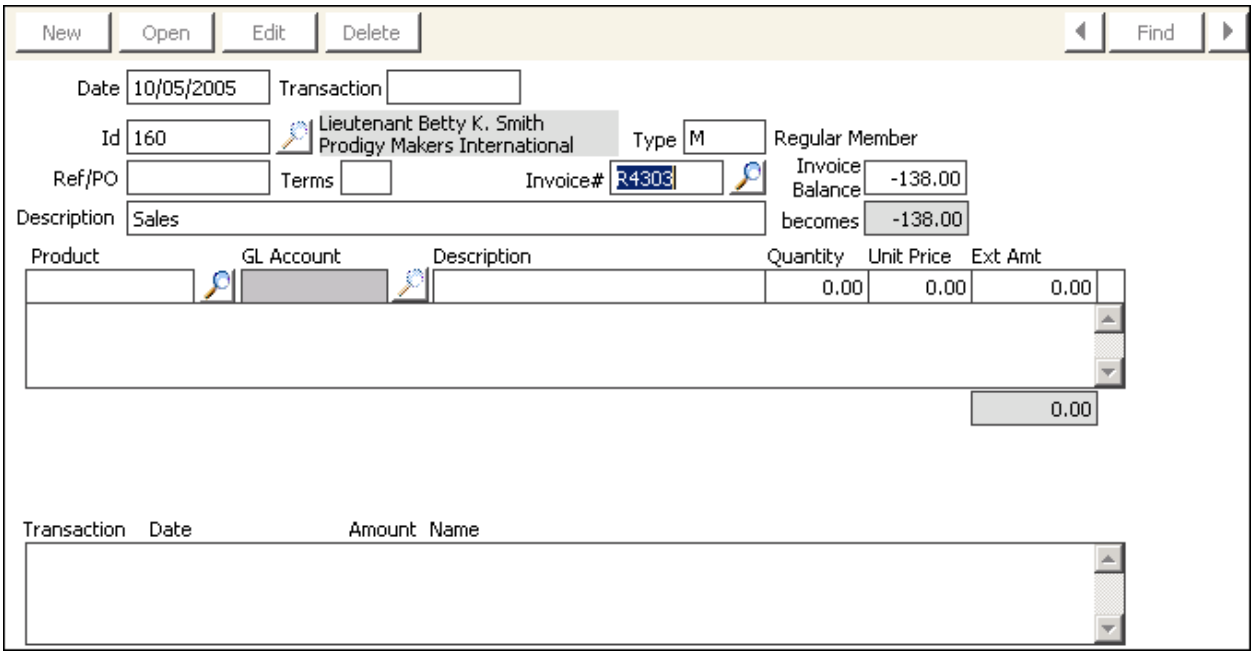
To apply debit memos to multiple funds

To apply a debit memo to multiple funds for a split gift, use the Enter and edit debit memos window.

1. From Enter and edit debit memos window, click New.
2. Enter the donor ID in the Id field, or click the lookup icon to select a donor ID.
3. Enter the transaction number in the Invoice# field and press Tab. The split gifts per fund for the transaction display.
4. Enter the distribution or premium code in the Product field, or click the lookup icon to select a distribution or premium, and press Tab.

   Note: If more than one distribution is assigned to the same fund, only one line displays for the fund, showing the combined charges for these distributions. You must know the distribution or premium code that you wish to adjust and its value per the installment invoice.
5. Enter 1 in the Quantity field.
6. Enter the debit memo amount in the Unit Price field.
7. (optional) Repeat to apply the debit memo to additional distributions or premiums.
8. Click Save.

Enter and edit debit memos window



Admin Console: Accounting > Adjustments > Enter and edit debit memos
Desktop: AR/Cash > Enter and edit transactions > Debit memos

Date

iMIS automatically enters the current system date (or the date entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to move the cursor back to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date and cannot be overridden.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Id

Enter the customer ID that relates to the sale, or use the lookup icon to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Ref/PO

Enter the customer's purchase order number or other reference number that should appear on the invoice. The reference/purchase order value will display on the AR statement.

Terms

(optional) Enter the code for the type of sale terms that apply to this invoice, or use the lookup icon to select a value.

Invoice#

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

Invoice Balance

(read only) Running invoice balance automatically updated by iMIS.

becomes

(read only) Invoice balance after the credit adjustment displays in this field (only displays when you click the New button)

Description

(read only) This description is populated by the description in the invoice to which the credit or debit memo is related.

Product

Enter a valid product code from the Set up products window, or use the lookup icon to select a value.

GL Account

Automatically populated with the GL account number if a GL account number is defined for the product. If the Allow GL Account Edit for Sales Transactions option is enabled (go to Accounting > Options > Configure accounting options), you can enter a GL account number if the GL Account field is blank or enter a different GL account number if the GL Account field is populated.

If a GL account number is not defined for the product and you leave the GL Account field blank, the GL Account field is automatically populated with the default Income Account for the transaction's owner entity.

If the Allow GL Account Edit for Sales Transactions option is disabled, this field is display-only and the GL account number cannot be added or changed.

(Product) Description

Populated automatically by iMIS, but can be overridden manually.

Quantity

Enter the Quantity of the product being sold. This quantity is applied against the unit price to arrive at the extended amount.

Enter quantities as whole numbers unless you are designating time or other partial quantities. For time or other partial quantities, enter fractions as decimals: (for example, enter 1.5 for 1-1/2)

Unit Price

iMIS automatically fills in the Unit Price if a product price has been defined on the Set up products window.

To override this price, click on the field (or press Shift+Tab to return to the Unit Price field), and enter a new value.

Ext Amt

(read only) iMIS automatically calculates the extended price.

Transaction list

Displays the transaction date, check number or credit card type, transaction amount, and customer name.

Enter and edit pledge credit memos

To enter a pledge credit memo

1. From Enter and edit pledge credit memos window, click New.
2. The Date field defaults to:

- The batch date if batch control is enabled. If an active, open batch is not selected, the Open Batches window opens. After selecting or creating a batch, click New on the Enter and edit pledge credit memos window again.
- The system date if batch control is not enabled. If you override the system date, the new date becomes the default date for new credit memos until the Enter and edit pledge credit memos window is closed and reopened.

3. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID, and press Tab. After the ID field is populated and Tab is pressed, an address block for the customer displays in the Enter and edit pledge credit memos window and the Type and Status fields are populated.
4. Click Find Pledge to display the Find window.
5. Select the pledge to be adjusted and click OK.
6. Use one of the following methods to specify the credit memo adjustment:

- Click Adjust All to issue a credit memo against all installments associated with a pledge that has a non-zero balance.
- Select the Credit checkbox to credit specific line items. For example, enable the Credit option for invoice number R65, and the full amount displays in the Amount Adj field for this invoice number.

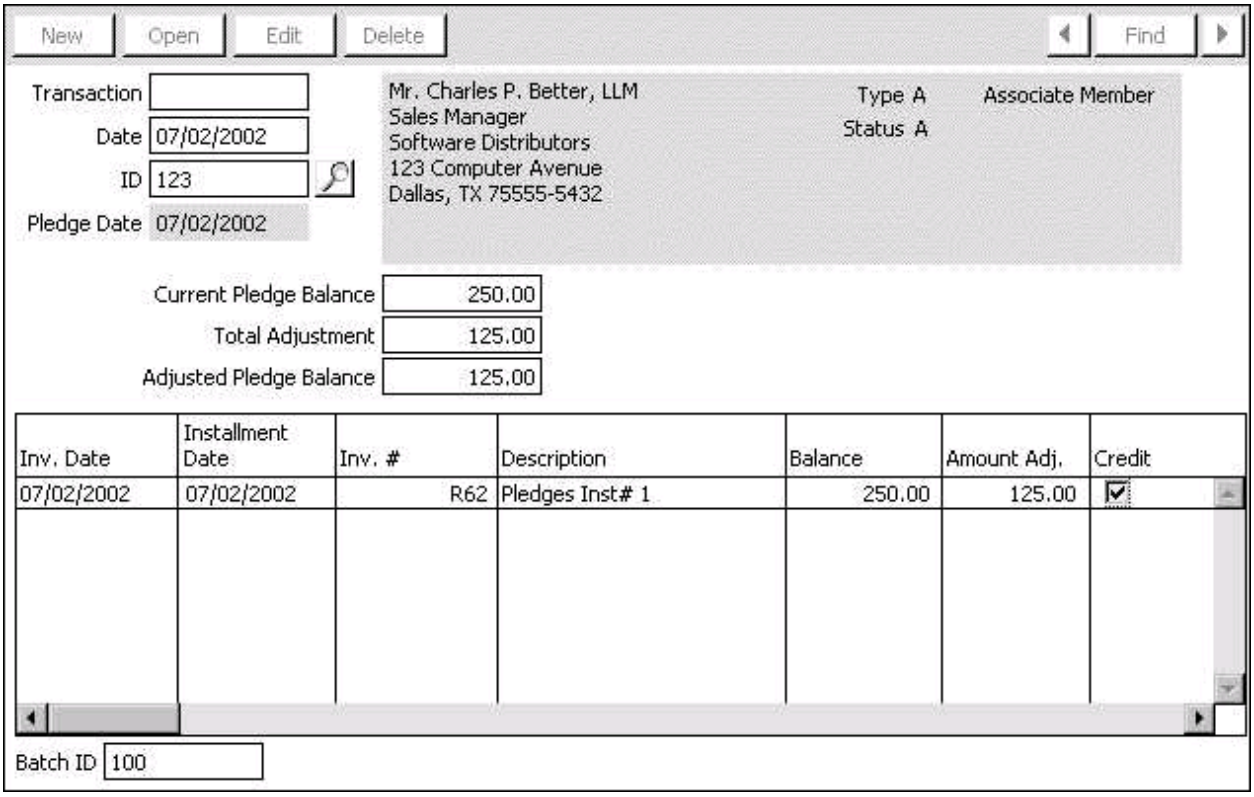
7. Enter the amount to credit in the Amount Adj field for the line item. For example, enter 25.00 in the Amount Adj field for invoice number R64 and press Tab. This will

automatically enable the Credit checkbox for this line item.

8. Click Save. The total amount of the credit memo displays in the Total Adjustment field.

   Note: Line items that were not adjusted are no longer displayed in the Enter and edit pledge credit memos window after you click Save.

Enter and edit pledge credit memos window



Admin Console: Home > Fundraising > Enter and edit pledge credit memos
Desktop: Fundraising > Enter and edit adjustments > Pledge credit memos

Transaction

Displays the completed transaction number. You can click Open and enter the transaction number to look up an existing credit memo transaction.

Date

Displays the batch date or current system date. You can override this date if batch control is not enabled. You can click Open and enter the transaction date to look up an existing credit memo transaction.

ID

Enter the ID of the customer whose record is being adjusted.

Pledge Date

Displays the date of the selected pledge.

Current Pledge Balance

Displays the total balance due for all installment invoices.

Total Adjustment

Displays the total amount of the pledge credit memo adjustment for the selected line items.

Adjusted Pledge Balance

Displays the remaining pledge balance after the pledge credit memo adjustment (the difference between the Current Pledge Balance and Total Adjustment fields).

Inv. Date

Displays the invoice date of the pledge transaction (displays all Invoice.INVOICE_DATE fields associated with the Transaction).

Installment Date

Displays the date of each installment transaction (displays all Invoice.INSTALL_BILL_DATE fields associated with the Transaction).

Inv. #

Displays the invoice number of each installment transaction (displays all Invoice.INVOICE_NUM (if non-zero, else a concatenation of 'R' and Invoice.REFERENCE_NUM) fields associated with the Transaction).

Description

Displays a description of the pledge transaction (displays all Invoice.DESCRIPTION fields associated with the Transaction).

Balance

Displays all Invoice.BALANCE fields associated with the Transaction.

Amount Adj.

This is the dollar amount to be adjusted from this line item. Entering an amount in this field automatically enables the Credit checkbox.

Credit

Enable this checkbox for the line item that will receive the credit memo. If you enter an amount in the Amount Adj field and press Tab, the Credit checkbox is automatically enabled. If you enable this checkbox without entering a value in the Amount Adj field, the Amount Adj field is automatically populated to offset the remaining pledge installment balance, resulting in a net pledge installment balance of zero.

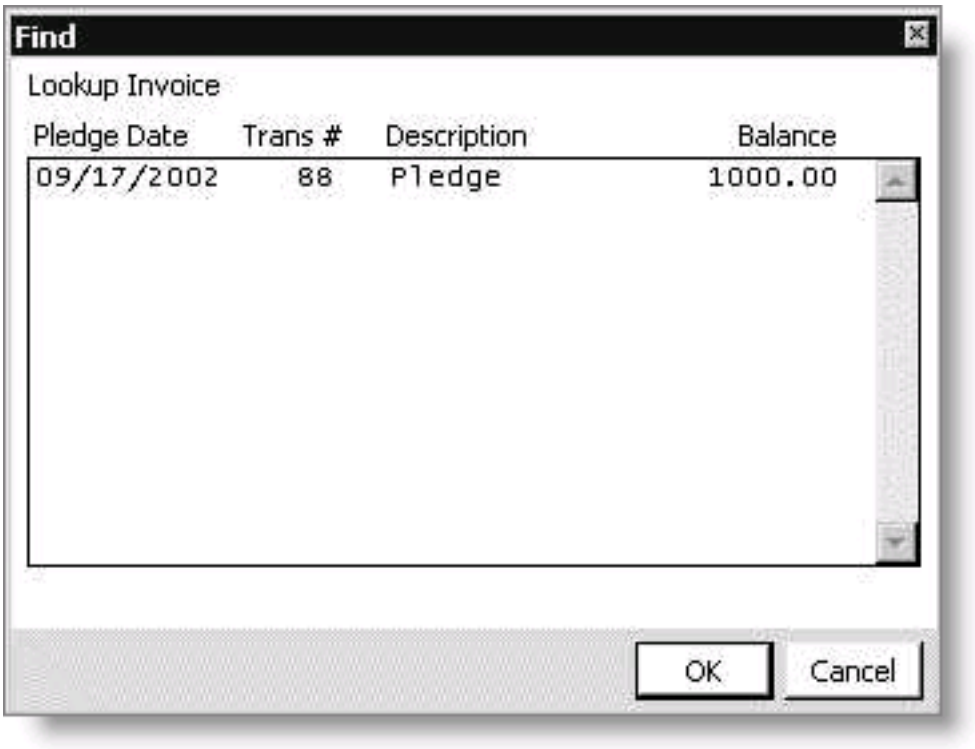
Batch ID

Displays the ID of the batch associated with the selected line item if batch control is enabled.

Find Pledge

Enables you to find the pledges for the current donor ID. This button is only enabled after clicking New and entering a donor ID.

Find window



Pledge Date

Displays the Invoice.INVOICE_DATE of any invoice with common Invoice.ORIGINATING_TRANS_Nums.

Trans #

Displays the Invoice.OPRIGINATING_TRANS_NUM for the pledge.

Description

Displays the word Pledge.

Balance

Displays the sum of Invoice.BALANCE for all invoice records equal to the Invoice.ORIGINATING_TRANS_NUM.

Line items are summary information and are displayed in descending order by Pledge Date and then in descending order by Trans # within date from the following:

- Invoice.SOURCE_SYSTEM is equal to FR.
- Invoice.INSTALL_BILL_DATE is not null.
- Invoice.ORIGINATING_TRANS_NUM is the same for all Trans #.

Adjust All

Enables you to issue a credit memo against all installments associated with a pledge that have a non-zero balance.

Enter and edit pledge debit memos

Debit memos have the opposite effect of credit memos, increasing the balance of open accounts receivable items.

Use debit memos for the following tasks:

- Increase or add a line item charge.
- Bring a credit balance to zero due to an overpayment, credit memo, or cancellation transaction.

To enter a pledge debit memo

1. From Enter and edit Pledge debit memos window, click New.
2. The Date field defaults to one of the following:

- If batch control is enabled, the Date field defaults to the batch date. If an active, open batch is not selected, the Open Batches window opens. After selecting or creating a batch, click New on the Enter and edit pledge debit memos window again. You cannot override the date if batch control is enabled.
- If batch control is not enabled, the Date field defaults to the system date. You can override this date. If you override the system date, the new date becomes the default date for new debit memos until the Enter and edit pledge debit memos window is closed and reopened.

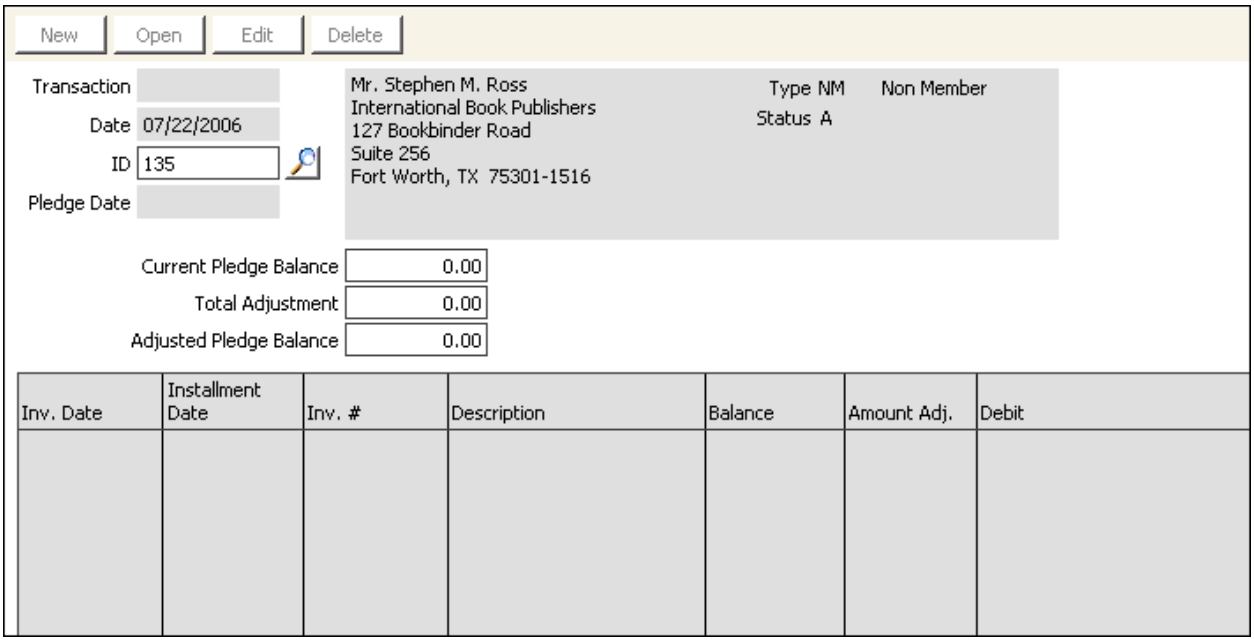
3. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID, and press Tab. After the ID field is populated, an address block for the customer displays in the Enter and edit pledge debit memos window and the Type and Status fields are populated.
4. Click Find Pledge to display the Find window.
5. Select the pledge installment for the pledge debit memo adjustment.
6. Click OK.
7. Use one of the following methods to specify the debit memo adjustment:

- Click Adjust All to select all line items with a balance to debit. The full amount displays in the Amount Adj field for each line item, the Debit checkbox is selected for each line item with a balance, and the total amount of all debit memo adjustments displays in the Total Adjustment field. The Adjust All button is only enabled if the total pledge balance is negative.
- Select the Debit checkbox to debit specific line items. For example, enable the Debit checkbox for invoice number R65 and the full amount displays in the Amount Adj field for this invoice number.
- Enter the amount to debit in the Amount Adj field for the line item. For example, enter 25.00 in the Amount Adj field for invoice number R64. This will automatically enable the Debit option for this line item.

8. Click Save. The total amount of the debit memo displays in the Total Adjustment field.

   Note: Line items that were not adjusted are no longer displayed in the Enter and edit pledge debit memos window after you click Save.

Enter and edit pledge debit memos window



Admin Console: Home > Fundraising > Enter and edit pledge debit memos
Desktop: Fundraising > Enter and edit adjustments > Pledge debit memos

Transaction

Displays the completed transaction number. You can click Open and enter the transaction number to look up an existing debit memo transaction.

Date

Displays the batch date or system date. You can override this date if batch control is not enabled. You can click Open and enter the transaction date to look up an existing debit memo transaction.

ID

Enter the ID of the customer whose record is being adjusted.

Pledge Date

Displays the date of the selected pledge.

Current Pledge Balance

Displays the total balance due for all installment invoices.

Total Adjustment

Displays the total amount of the pledge credit memo adjustment for the selected line items.

Adjusted Pledge Balance

Displays the remaining pledge balance after the pledge credit memo adjustment (the sum of the Current Pledge Balance and Total Adjustment fields).

Inv. Date

Displays all Invoice.INVOICE_DATE fields associated with the Transaction.

Installment Date

Displays the date of each installment transaction (displays all Invoice.INSTALL_BILL_DATE fields associated with the Transaction).

Inv. #

Displays the invoice number of each installment pledge transaction (displays all Invoice.INVOICE_NUM (if non-zero, else a concatenation of 'R' and Invoice.REFERENCE_NUM) fields associated with the Transaction).

Description

Displays a description of the pledge transaction (displays all Invoice.DESCRIPTION fields associated with the Transaction).

Balance

Displays all Invoice.BALANCE fields associated with the Transaction.

Amount Adj.

This is the dollar amount to be adjusted from this line item. Entering an amount automatically enables the Credit checkbox.

Debit

Enable this checkbox for the line item that will receive the debit memo. If you enter an amount in the Amount Adj field and press Tab, the Debit checkbox is automatically enabled. If you enable this checkbox without entering a value in the Amount Adj field, the Amount Adj field is automatically populated to offset the remaining pledge installment balance, resulting in a net pledge installment balance of zero.

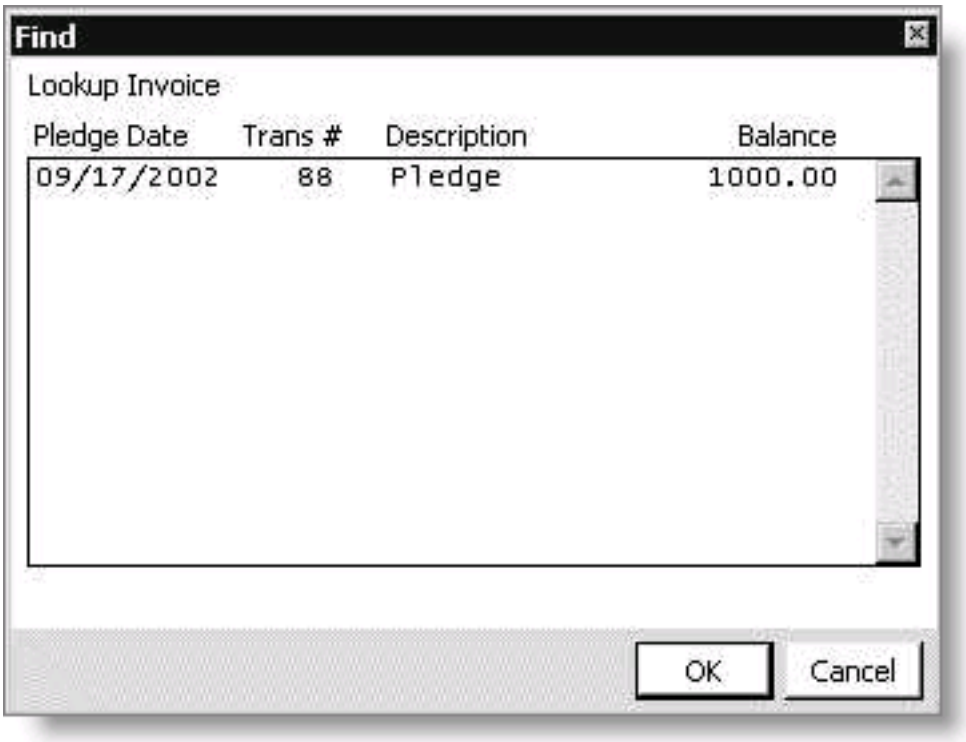
Batch ID

Displays the ID of the batch associated with the selected line item.

Find Pledge

Enables you to find the pledges for the current donor ID. This button is only enabled after clicking New and entering a donor ID.

Find window



Pledge Date

Displays the Invoice.INVOICE_DATE of any invoice with common Invoice.ORIGINATING_TRANS_Nums.

Trans #

Displays the Invoice.OPRIGINATING_TRANS_NUM for the pledge.

Description

Displays the word Pledge.

Balance

Displays the sum of Invoice.BALANCE for all invoice records equal to the Invoice.ORIGINATING_TRANS_NUM.

Line items are summary information and are displayed in descending order by Pledge Date and then in descending order by Trans # within date from the following:

- Invoice.SOURCE_SYSTEM is equal to FR.
- Invoice.INSTALL_BILL_DATE is not null.
- Invoice.ORIGINATING_TRANS_NUM is the same for all Trans #.

Adjust All

Enables you to issue a debit memo against all installments associated with a pledge that have a non-zero balance. This button is only enabled when the total pledge balance is negative.

Options

Configure accounting options

Note: Several configuration options on the Configure accounting options window are documented within the iMIS Desktop. Links in the following sections might display iMIS Desktop documentation. This saves you time and effort when configuring accounting options.

Configuring the Accounting module includes setting up the following options:

- Basic accounting options
- Default Accounts

- Aging
- Batch Control
- G/L Interface
- Credit Card Authorization
- Advanced PCI Compliance
- (VAT only) Taxation methods

Financial entities

Before you configure several of the Accounting module features, you must define one or more financial entities in the iMIS system setup. Entities are also known as organizations, or in the case of fundraising financial entities, funds.

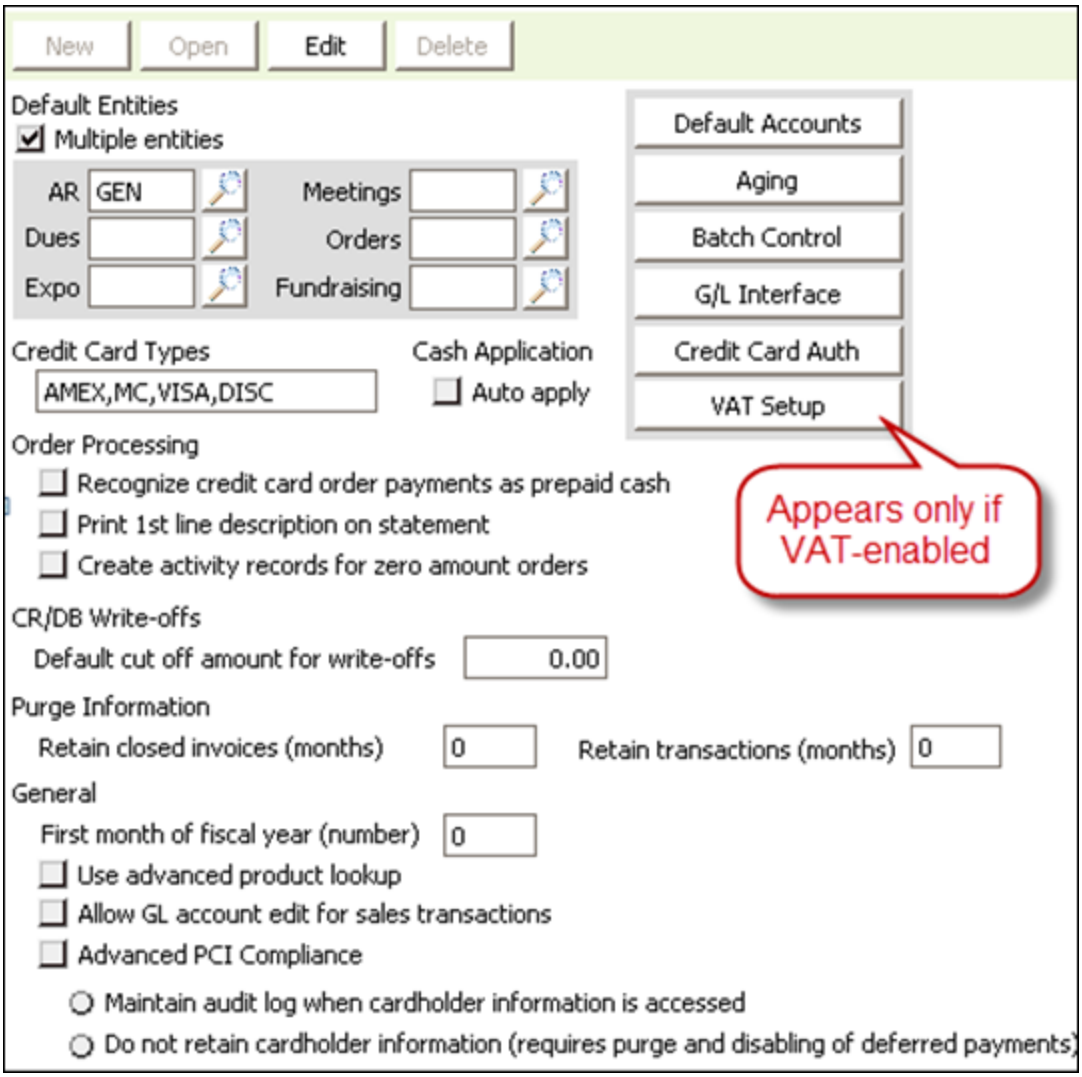
Note: A fund is an organization or entity that serves as an asset account for fundraising activities. If the entity currently being defined represents a Fund to which Fundraising gifts and pledges may apply, select the Is Fund checkbox in the Organization Names window.

See the System Setup section for help with "Defining an organizational entity".

Setting basic accounting options

Use the Configure accounting options window to define high-level options such as:

- Default Entities
- Credit Card Types
- Cash Application information
- Order Processing information
- Credit/debit (CR/DB) Write-offs
- Purge Information



Admin Console: Accounting > Options > Configure accounting options

Desktop: AR/Cash > Set up module

Default Entities

- Multiple Entities – For most organizations, this option should be disabled. When enabled, iMIS separates and processes transactions for multiple financial entities that share a common customer database, and the following fields designate the default entities for their modules:
- AR – entity code for iMIS AR/Cash
- Meetings – entity code for iMIS Events

- Dues – entity code for iMIS Billing
- Orders – entity code for iMIS Orders
- Expo – entity code for iMIS Exposition Management
- Fundraising – entity code for iMIS Fundraising

Credit Card Types

- Designates a comma-delimited list of acronyms (which iMIS stores as uppercase) for credit cards you accept. Common acronyms include Master Card (MC), Visa (VISA), Discovery (DISC), and American Express (AMEX). If you use iMIS authorized forms, such as preprinted invoices that contain a credit card payment box, this list is printed in that box, which allows the customer to see the available credit choices.

  Note: This does not provide credit card validation or credit card processing within iMIS. See Credit Card Authorization for setup details.

Cash Application

- Auto apply – When enabled, incoming cash receipts are automatically applied to invoices beginning with the oldest outstanding balance on an individual's record. This setting can be overridden when entering cash receipts.

  Tip: If you have heavy transaction volumes, do not enable Cash Application: Auto apply.

  Note: Auto apply only affects the functionality of the Enter and edit cash receipts window and AR Importer; if Auto apply is disabled, payment records in AR Importer files must contain the invoice number.

Related windows

- Default Accounts opens the AR/Cash Default Accounts window.
- Aging opens the AR/Cash Aging window.
- Batch Control opens the AR/Cash Batch Control window.
- G/L Interface opens the AR/Cash General Ledger Interface window.

- Credit Card Auth opens the AR/Cash Credit Card Authorization window. (Enabled only if your system is licensed for CCAUTH.)

  Order Processing

- Recognize credit card order payments as prepaid cash – When enabled, iMIS allows the credit card payment to be handled in the same manner as a cash payment and immediately record the payment into the batch, with an immediate debit to Cash and credit to the Prepaid account. When disabled, iMIS follows standard accounting practices and does not recognize cash for credit card payments until an order is shipped.

  Note: Credit card payments on orders placed in Orders and Service Central are always recognized as prepaid cash regardless of whether Recognize credit card order payments as prepaid cash is enabled.

- Print 1st line description on statement – When enabled, the first line of an order or a user comment appears in the AR/Cash tab on the Manage customers window and on the Enter and edit cash receipts window, and it prints on AR Statements. When disabled, only the order number appears.

- Create activity records for zero amount orders – When enabled, activity records are created for orders that are no-charge orders.

  CR/DB Write-offs

- Default cut off amount for write-offs – Sets the maximum default amount to be written off. During the write-off process, all debit or credit balances less than or equal to this amount are written off. This value can be overridden during the actual write-off process.

  Purge Information

- Retain closed invoices (months) and Retain transactions (months) – Designates how long records can be viewed in iMIS after being closed. Set up your organization's overall purging parameters (months) for the Accounting module's housekeeping function.

  General

- First month of fiscal year (number) – Designates the first month of your organization's fiscal year. Some GL interface choices will export the fiscal period along with the calendar transaction date of the transactions.

  Note: Annual dues uses this field to determine the Effective Date on the Process billing window.

- Use advanced product lookup – When enabled, enables users to use the Lookup icon to find products when entering and editing AR/Cash sales transactions.
- Allow GL account edit for sales transactions – When enabled, allows editing of the GL Account field for each product selected during sales, credit memo, and debit memo transactions. When disabled, the GL Account field cannot be edited on the Enter and edit sales transactions, Enter and edit credit memos, and Enter and edit debit memos windows.
- Advanced PCI Compliance – Enables iMIS-wide enforcement of the PCI Compliance support (see "Implementing Advanced PCI Compliance options") option that you choose:
- Maintain audit when cardholder information accessed – Directs iMIS to save encrypted cardholder data and to log every system event in which card information is accessed. The log is kept in the PciAuditLog table (see "Reading the PciAuditLog table").
- Do not retain cardholder information – Directs iMIS to save transactions without storing any cardholder data and to show only gateway reference numbers and authorization codes in windows and reports.

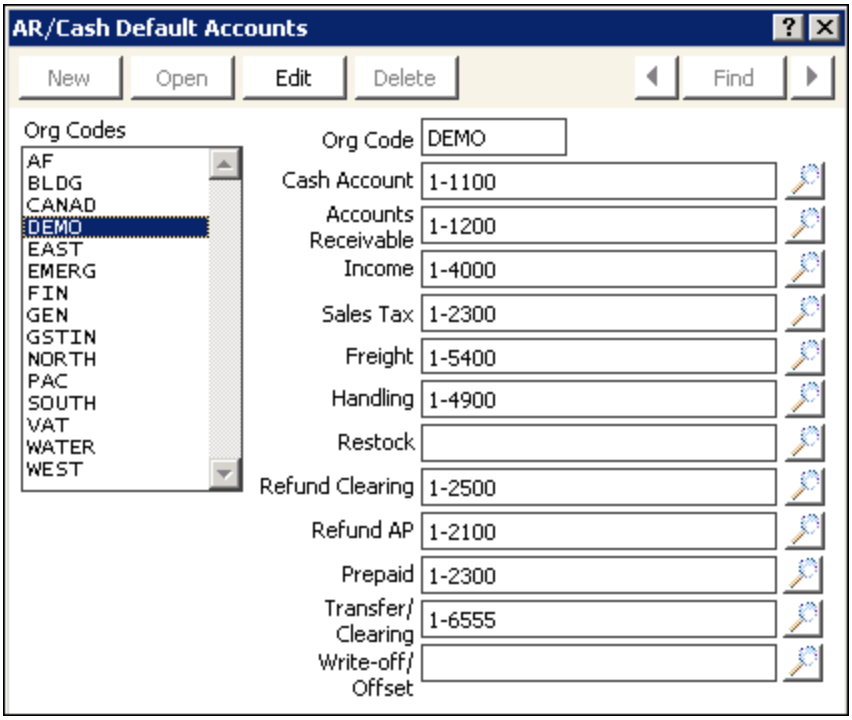
  Caution! To use this option, you must purge existing cardholder data from your database and disable all deferred payment processing in iMIS. See "Implementing Advanced PCI Compliance options".

Default Accounts

To assign AR/Cash default accounts codes

1. From the Configure accounting options window, click Default Accounts to open the AR/Cash Default Accounts window.

2. From Org Codes, choose an organizational code.
3. Click Edit.
4. Enter the account number (or click the lookup icon to select a value) in each field.
5. Click Save.



Org Codes

The Org Codes listed are set up in the Organization Names window using the iMIS system setup menu. The selected organization is displayed in the Org Code field.

Cash Account

(Required unless you are using batch control) If you are using batch control, all cash account codes are set by the Cash Account table entry for that batch.

This account is used for all iMIS cash-related transactions unless batch control is enabled or a credit card override account is specified. Multiple cash accounts can be defined and used at the batch control level.

Accounts Receivable

(required) This is the only place you can enter the main AR account code.

This is the main account that iMIS uses whenever full payment is not received for any order (for example, sales item or event registration). You can only have one Accounts Receivable account per organization.

Income

(Required if a specific income account is not supplied at the product level) iMIS uses this default income account only for those transactions where an income account is not specified at the product level.

Sales Tax

(Required if any account codes are not supplied at the tax authority level) iMIS uses this default sales tax account only for those transactions where a sales tax account is not specified at the product level.

Freight

(required) Enter an account code for the freight charges associated with orders.

Handling

(required) Enter an account code for the handling charges associated with orders.

Restock

Enter an account code for the charges associated with restocking returned orders.

Refund Clearing

This default account is the offsetting account that iMIS uses when it clears credit balances marked for refunds. Refund processing is performed on the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices). For more information, see Creating Credit Invoices.

This account also serves as a suspense (or bridge) account between AR and AP.

Each time iMIS generates a refund, accounts receivable is debited (to clear the credit balance) and the refund clearing account is credited. This credit balance is debited and cleared only when you enter the parallel account payable (AP) entry.

Refund AP

(Required only if you are licensed for the iMIS AP interface and you are importing into your third-party accounts payable software) This account is the accounts payable control account for the AP interface.

Prepaid

iMIS uses this account when a prepaid order is initially entered. The Cash account is debited and the Prepaid account is credited. When the order is invoiced, iMIS clears the prepaid amount and credits (transfers to) the appropriate income account.

This is a required account that is used in conjunction with prepaid order processing (simple or full order entry). The prepaid account is typically a deferred income balance sheet account.

Note: Non-credit card cash order prepayments will involve the prepaid account, because check and currency receipts are immediately recognized upon order entry. Credit card payments will also use the Prepaid account if the Recognize Credit Card Order Payments as Prepaid Cash option is enabled (from AR/Cash, select Set up module). Otherwise, credit card payments are recognized when the order is invoiced.

Transfer/Clearing

This account is reserved for transaction generation where forced balancing is required.

iMIS uses the Transfer/Clearing account for two different system processes:

- Used in conjunction with prepaid order processing (simple and full order entry). It is used as a clearing account in the process to transfer the prepayment offset from prepaid (deferred income) to income.
- Used in the GL interface procedure for certain GL package choices. It is used when GL journal entries are generated and a restricted number of transaction lines are mandated.

Note: When the Transfer/Clearing account is used in a line item within a transaction, there will always be an offsetting line item(s) in an associated transaction to ensure that entries to the transfer account will always balance to zero.

Write-off/Offset

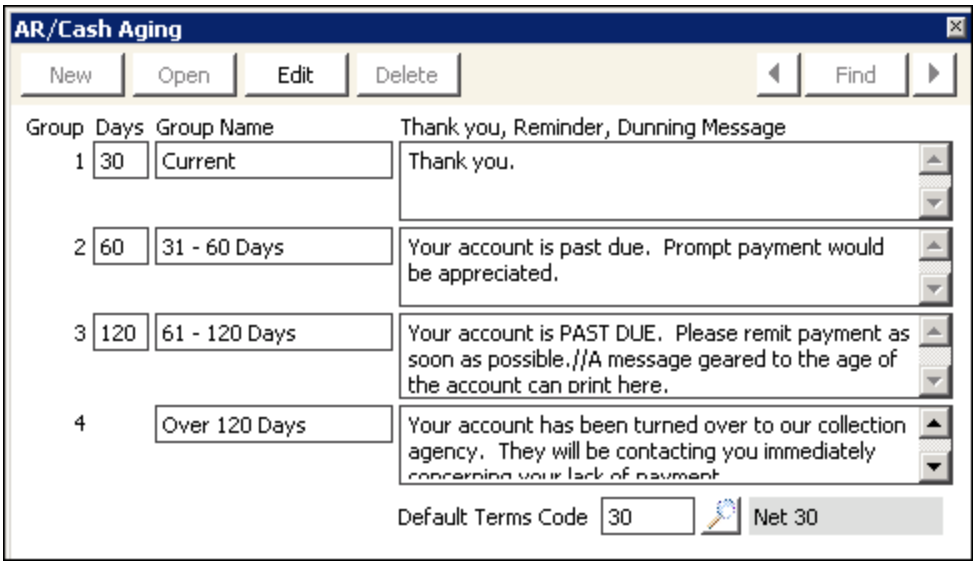
This is the GL account to which the offset credit or debit created by the credit/debit write-off process (from AR/Cash, select Process month-end procedures, and click Credit/Debit Write-Offs) will be written.

Aging

You must define the guidelines for determining the aging groups to use for statements, aged trial balances, and account inquiries. Aging is the length of time an amount is past due for payment on an invoice.

To define aging groups

1. From the Configure accounting options window, click Aging to open the AR/Cash Aging window.
2. Click Edit.
3. Enter the aging information.
4. Click Save.



Group

Four groups define the guidelines for determining the Aging Groups to use for statements, aging trial balances, and account inquiries.

Days

The number of days indicates how many days old the invoice can be before the invoice moves out of this particular age group. When the invoice passes this age group by one day, the system automatically moves the invoice to the next age group.

Group Name

Enter a short name for each age group that names the group for all statements, aged trial balances, and account inquiries.

Thank you, Reminder, Dunning Message

If you would like a message to appear on statements when an account reaches a certain age, enter the message next to the appropriate age group. You can have different messages print for different ages.

Note: Currently, aging is based on the date of the invoice, not on a due date calculated from payment terms.

Default Terms Code

The Default Terms Code applies to all levels of order entry. Enter the code of the terms you defined on the Set up terms window (go to Accounting > Options > Set up tables > Set up terms) that you want to use by default, or use the lookup icon to select a value. For example, a default term code of 30 would represent Net 30 days.

Note: You must populate the Default Terms Code field in order for Events functions to show for people to register for events on the Public view.

Batch Control

Note: Links might display iMIS Desktop documentation. This saves you time and effort when configuring Batch Control options.

Setting up batch control consists of enabling batch control, configuring numbering and viewing options, and setting up cash accounts. These steps are required even if you only have one account.

Note: AR Importer batches are auto-created and auto-numbered and do not recognize specific iMIS users. These batches are assigned to the Manager user in iMIS, and require a security level of 8 to view, edit, or delete transactions when the View Batch by User option is selected.

AR/Cash Batch Control window

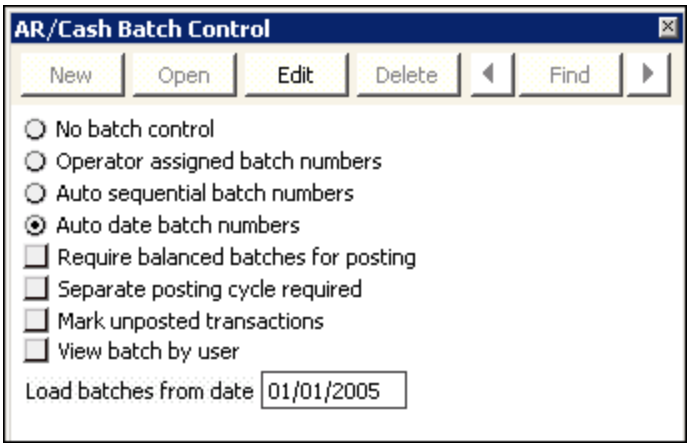
This window specifies whether batch control is enabled, and if it is, the options that apply to batches throughout iMIS.

To set up Batch Control

1. From the Configure accounting options window, click Batch Control to open the AR/Cash Batch Control window.
2. Click Edit.
3. Select a batch control numbering option. The Auto sequential batch numbers option or the Auto date batch numbers option is recommended.
4. (Recommended) Select the Require balanced batches for posting option to require that the control amount equals the actual amount, and the control count equals the actual count, before posting.
5. (optional) Select the Separate posting cycle required checkbox.

   Note: This option is incompatible with Service Central.
6. (optional) Select the Mark unposted transactions (see About marking unposted transactions) checkbox.
7. (optional) Select the View batch by user (see Limits on editing and deleting transactions) checkbox.
8. Click Save.

9. Go to Accounting > Set up tables > Set up cash accounts to open the Set up cash accounts window.
10. Make an entry for all cash accounts (see Set up cash accounts) on the Set up cash accounts window.
11. Click Save.



Batch control

The following options govern batch control in iMIS:

No batch control – Specifies that no batch control is used. This is a good option for simple or low-volume systems.

Operator assigned batch numbers – Specifies that batch control is used and that data-entry operators can create their own batch numbers when needed. The batch number may be a combination of up to 15 alphanumeric characters.

Auto sequential batch numbers – Specifies that batch control is used and that iMIS automatically assigns batch numbers to new batches using a sequential numbering system.

Auto date batch numbers – Specifies that batch control is used and that iMIS automatically assigns batch numbers to new batches using a date-oriented technique. Multiple batches created on the same date are distinguished from each other with a sequential suffix attached to each new batch generated in a day. For example, 020515-1, 020515-2, and so forth.

Note: The following options are not displayed unless you enabled batch control by selecting one of the batch numbering options (Operator assigned batch numbers, Auto sequential batch numbers, or Auto date batch numbers).

Require balanced batches for posting

(Recommended) Specifies that unbalanced batches cannot be posted. For this option, iMIS considers a batch balanced when the following statements are true:

- The control amount is equal to the actual amount.
- The control count is equal to the actual count.

If either or both of the following statements are false, iMIS displays an error message, and does not post the batch.

Note: Hot posting (the default) reports transactions immediately.

Separate posting cycle required

Specifies that transactions are not hot posted. Most users should not enable this option, because it prevents iMIS from automatically posting and updating accounting events to AR/Cash. Instead, transactions are posted only when the batch is posted.

Only in very high volume situations should you consider giving up the hot posting convenience, which saves processing time and speeds data entry.

Note: This option is not compatible with Service Central.

Mark unposted transactions

When selected, unposted transactions are preceded by (U) in the Description field on the Transaction Ledger window.

Note: If the Separate Posting Cycle Required option is enabled, transactions are not displayed in the Transaction Ledger window until the batch is posted, so no transactions will be preceded by (U) if the Separate Posting Cycle Required option is enabled.

View batch by user

Hides batches created by others from users whose authorization level for AR/Cash is less than 8. When this option is not selected, displays batches created by others. Hidden batches include the following batches:

- Accrual billing batches
- Orders with the Create New Batch for Invoicing option enabled
- AVAIL_CREDIT batches
- Importer batches (Billing, AR/Cash, Orders)

Load batches from date

specifies a default date that is used to filter batches displayed in the manage batches window. users can override this filter.

Limits on editing and deleting transactions

When the View batch by user checkbox is selected, users can only edit or delete transactions contained in unposted batches that they create. If users attempt to edit or delete a transaction that was created by another user, a message instructs them to select a different transaction.

About marking unposted transactions

You must enable a batch control option and select the Mark unposted transactions checkbox on the AR/Cash Batch Control window before transactions can be marked as unposted.

If the Separate posting cycle required option is enabled, unposted transactions will not be displayed in the Transaction Ledger window.

An invoice will be visually marked as unposted with (U) if there is at least one transaction record linked to that invoice (a payment or an adjustment to that invoice) that meets all three of the following requirements:

- The transaction is linked to a batch.
- The batch has not been closed or posted (the batch has a status of Open or Ready on the Manage batches window).
- The transaction has not been exported through the General Ledger.

  Note: Only future transactions are marked as unposted after the Mark unposted transactions option is selected.

  Note: If the Separate posting cycle required option is enabled, unposted transactions will not show up in the Transaction Ledger window.

G/L Interface

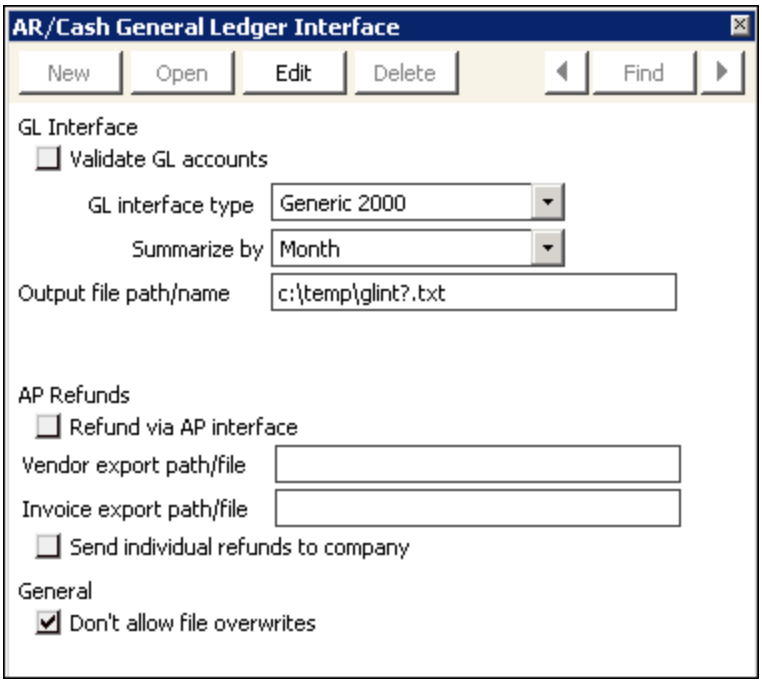
The AR/Cash General Ledger Interface window is used to validate general ledger accounts, configure the general ledger interface type, and configure how refunds for the accounts payable are exported.

To configure the GL interface

Note: These options apply only if you have purchased a license for the iMIS Financial Systems interface or AP interface.

The AR/Cash General Ledger Interface window lets you configure the iMIS GL and AP interfaces, which both require a license.

1. From the AR/Cash General Ledger Interface window, click Edit.
2. Select a general ledger accounting package from the GL interface type drop-down list.
3. Select a level of transaction detail from the Summarize by drop-down list.
4. Enter the file path and file name.
5. Enable the Refund via AP interface, Send individual refunds to company, and Don't allow file overwrites options if desired.
6. Click Save.



GL Interface

Validate GL Accounts – Enable the Validate GL Accounts option if you intend to maintain GL accounting details with true GL account numbers instead of iMIS-generated account numbers and require that the system verify that GL accounts entered throughout the system exist on the GL Accounts table. To integrate iMIS-generated transactions with an outside GL package, you must maintain true GL accounts.

iMIS can validate account numbers entered on the AR/Cash Default Accounts window and in all product code and related tables throughout iMIS.

Note: To define valid GL accounts, build a table (called GL_ACCOUNT) to include all available account numbers on the Set up general lookup/validation window.

Note: The Import button on the Set up general lookup/validation window lets you import your chart of accounts from your third-party GL package.

GL interface type – Select a third-party GL software option from this drop-down list. All current third-party GL software options are included on this drop-down list. Select the None option if you are not planning to use a third-party GL software package.

Summarize by – Select one of the following options from this drop-down list to determine the level of summary applied in the creation of the GL interface entries:

- Month – Summarizes all transactions for the entire month (or the date range requested in Create GL Journal, if less than a month) on a per GL account/pseudo-account basis. These entries are posted into a single journal entry in the GL Interface.
- Day – Within the requested date range, this posts a journal entry for each day that contains individual entries summarized per date per GL account/pseudo-account.
- Batch – Within the requested date range, this posts a journal entry for each batch that contains the batch number and a summary on a per GL account/pseudo-account basis.
- Detail – Within the requested date range, this posts a journal entry for each date, but summarizes only the Accounts Receivable entry. Although iMIS supports full detail, export and import procedures can be time consuming. You can produce detail transaction reports directly in iMIS to support more summarized entries.

Output file path/name – Designating an Output file path/name allows the iMIS interface to automatically create an output file with this path and file name. See Using special characters in file path/name for information on using special characters in the file path/name.

If the Output file path/name field is left blank, the system prompts you to provide a valid path and file name when the interface is run. If you do not specify the path and file type for the export file in this field, you can only specify an Omnis print file with a .prn extension when the interface is run.

Note: iMIS creates the export file and flags the included transactions (so that these transactions are skipped in future interface operations).

If the Output file path/name entered is not correct (for example, the referenced directory does not exist), an error message will display and the export is aborted.

Conversion Program File Path/Name – This field specifies the conversion program that will be executed for any GL interface type that begins with generic (not case-sensitive). This field is only displayed for GL interface types that begin with generic.

AP Refunds

- Refund via AP interface – Enable this option if you want the iMIS AP interface to process refunds.
- Vendor export path/file – Contains the file/pathname for the vendor export file.
- Invoice export path/file – Contains the file/pathname for the invoice export file.
- Send individual refunds to company (applies only to refunds) – Enable this option if you want the refund checks that are issued for a non-company member to be issued in the name of the company rather than the individual (even when the Bill To ID is the individual).

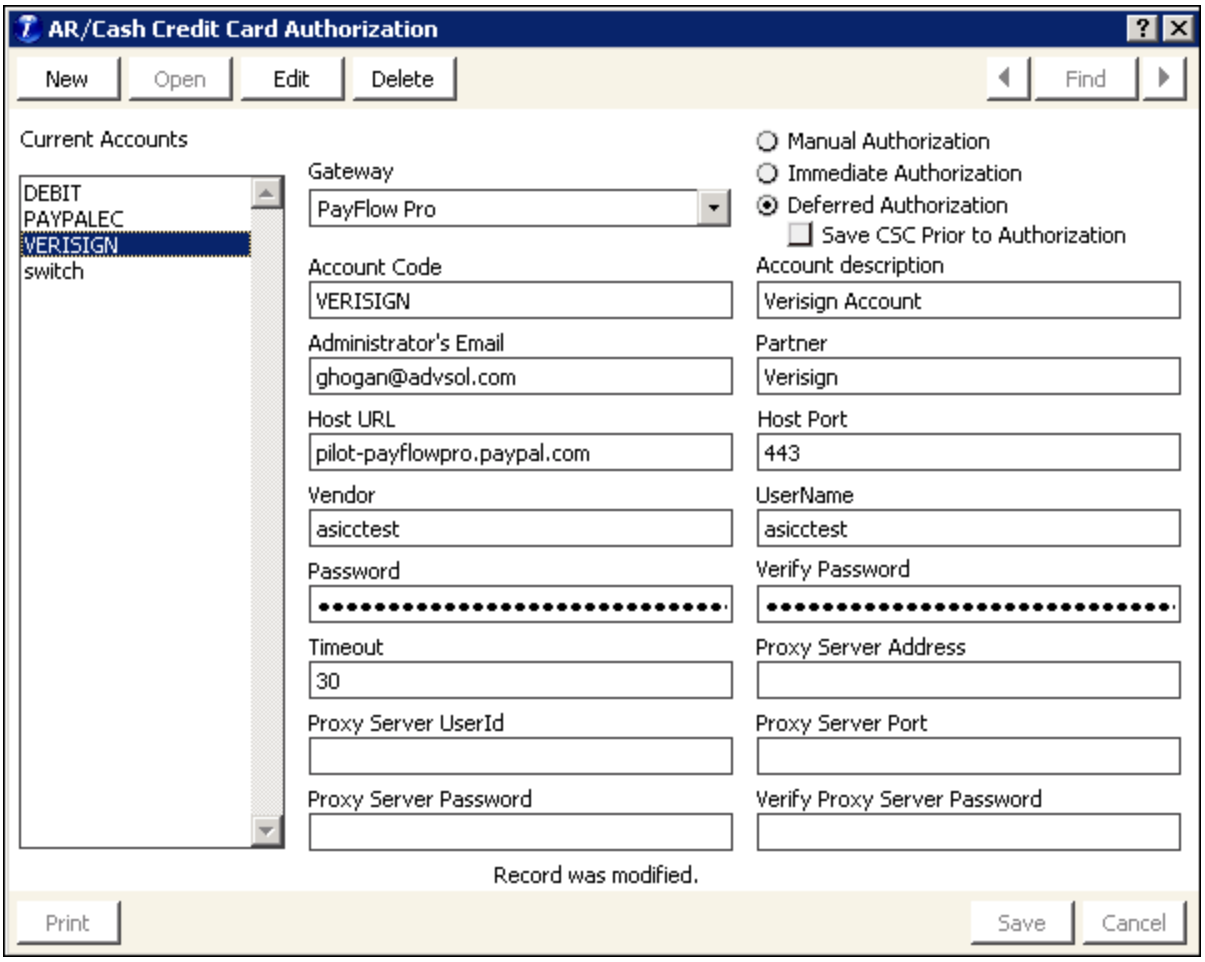
  Note: (Solomon only) With this option enabled, the individual's name will be placed into the contact name field of the created Solomon vendor record. However, the Solomon vendor name will be set to the iMIS company name, and the refund invoice will therefore be created payable to the company's name, not the individual. If this option is not selected (disabled), the vendor name for the refund in Solomon will be set to the individual's name and the individual will receive the payment. This option has no impact on the processing or refunds for Bill To IDs where the member type is a company, in which case the vendor name is populated with the company name.

  General

  Don't allow file overwrites – Enable to prevent iMIS from running the next GL interface and creating duplicate files and file names. Enabling this option also protects your export files from being accidentally overwritten if you have not imported the data into your third-party GL package before the next exports are produced. This option is needed only if you designate fixed file names (export.asc). However, if your third-party GL package prompts you for or allows for a unique import path/file name at run time, use the ? symbol to archive exported files and prevent overwrites.

Credit Card Auth

The AR/Cash Credit Card Authorization window specifies authorization options for credit cards and European debit cards.



Current Accounts

Lists the currently defined card authorization accounts.

Gateway

Lists the authorization gateways supported by iMIS.

- Payflow Pro authorizes domestic credit cards.
- SafePay authorizes international credit cards.
- Other, for European debit cards, enables storage of encrypted CSC values and unencrypted issue number and issue date values so that a custom gateway for deferred authorization of European debit card transactions can be implemented.
- Custom gateways, which you can write and install on your system.

Authorization options

Specifies the type of authorization that will be performed for all credit/debit card cash accounts that use this card authorization account.

- Manual Authorization – Disables automated authorization through a gateway. The payment information can be edited or deleted at any time until invoiced.
- Immediate Authorization (Payflow Pro and SafePay gateways only) – Performs automated authorization through a gateway. Payment information can be edited or deleted the same day only. Because the Other gateway is not supported, immediate authorization cannot be used for European debit card transactions. The following authorization process is used:

1. Credit card payment is entered.
2. Credit card information is immediately sent for authorization.
3. Authorization is returned and transaction is saved for later capture.
4. Transaction is saved and completed.

- Deferred Authorization – Performs automated authorization through a gateway. Payment information can be edited or deleted until the transaction is captured. The following authorization process is used:

1. Credit/debit card payment is entered.
2. Transaction information is saved for later batch processing.
3. Transactions are periodically sent in a batch for authorization and capture.
4. Transactions in the batch are saved and completed.

Save CSC Prior to Authorization

(only for Deferred Authorization) Saves the card security code (CSC) value in an encrypted format in the iMIS database, so that the CSC information can be sent with all other transaction information in the batch for deferred authorization.

If the associated Gateway is Payflow Pro or SafePay, iMIS automatically deletes the saved CSC information after successful deferred authorization. If the associated gateway is Other, however, the custom gateway implemented by your AiSP for European debit card authorization is responsible for ensuring that the saved CSC information is deleted from your iMIS database.

Account Code

Specifies a short name for the account.

Account description

(optional) Specifies a description for the account.

Administrator's Email

(Payflow Pro and SafePay gateways only) Specifies the email address of your iMIS administrator so that the gateway service can contact the administrator if necessary.

Partner

(Payflow Pro gateway only) Specifies the Payflow Pro partner name that was obtained when you created your account.

Host URL

(Payflow Pro gateway only) Specifies the web address of the Payflow Pro gateway.

Host Port

(Payflow Pro gateway only) Specifies the port number of the Payflow Pro gateway.

Vendor

(Payflow Pro and SafePay gateways only) Specifies your Payflow Pro user name or your SafePay merchant administration login (username) that was obtained when you created your account.

UserName

(Payflow Pro and SafePay gateways only) Specifies your Payflow Pro user name or your SafePay merchant ID that was obtained when you created your account.

Password, Verify Password

(Payflow Pro and SafePay gateways only) Specifies your Payflow Pro password or your SafePay merchant administration login password.

Timeout

(Payflow Pro gateway only) Specifies the gateway connection timeout value, in seconds. ASI recommends a timeout value of 30 seconds.

Proxy Server Address

(optional, Payflow Pro gateway only) Specifies the IP address of your organization's proxy server.

Proxy Server UserId

(optional, Payflow Pro gateway only) Specifies the user ID of your organization's proxy server.

Proxy Server Port

(optional, Payflow Pro gateway only) Specifies the port number of your organization's proxy server.

Proxy Server Password

(optional, Payflow Pro gateway only) Specifies the password required by your organization's proxy server.

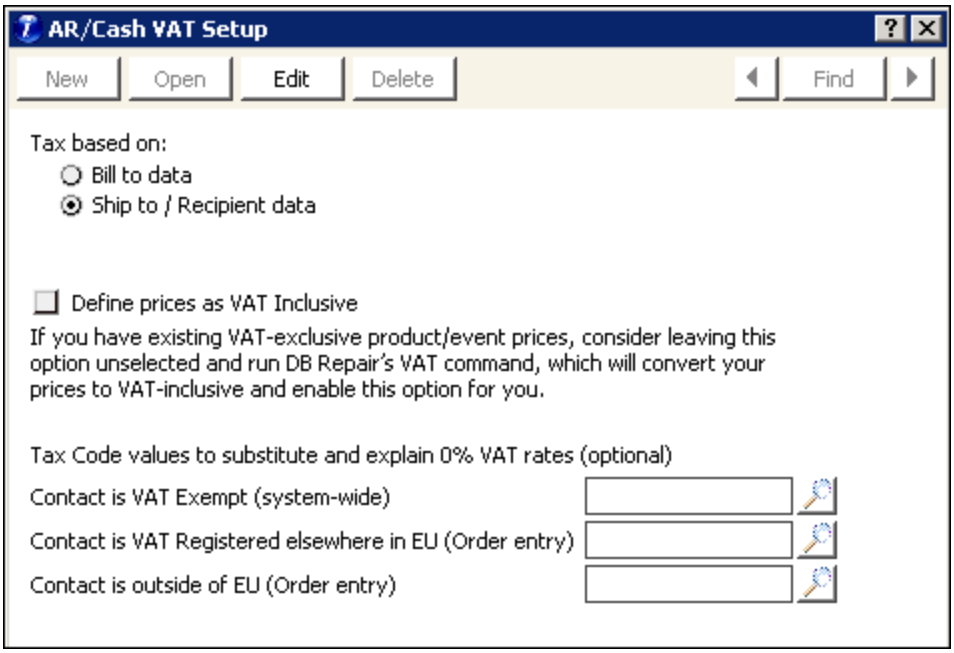
Verify Proxy Server Password

(optional, Payflow Pro gateway only) Specifies the password required by your organization's proxy server.

VAT Setup

Because organizations differ in how they need to charge VAT and handle pricing, iMIS gives you several global options that affect tax calculation and pricing of your order processing and events, across Desktop and the web views.

If your default organization is configured for VAT, then you see a VAT Setup button.



- Tax based on: – lets you change the method for evaluating taxation.
- Bill to data – Applies VAT based on the Bill to contact's location and VAT tab settings.
- Ship to / Recipient data – (default) Applies VAT based on the Ship to location and the recipient's VAT tab settings. This supports point-of-sale requirements for which contacts have different Ship to addresses or make purchases intended for others, such as a manager registering an employee at a different site.
- Define prices as VAT Inclusive – (non-reversible) When enabled, all system-defined prices for taxable products, events, shipping, and handling are considered VAT Inclusive. This means that you can define products and registration fees with the gross (tax-included) amounts that you will advertise to your members and the public. Once you

enable VAT-inclusive pricing, the option appears grayed out, because the setting is permanent.

Tip: To upgrade quickly to VAT Inclusive pricing, back up your database and run the DB Maintenance standalone utility, whose VAT tab performs a one-time conversion of your VAT-exclusive product prices and registration fees to be VAT-inclusive. Once your data is converted, the command enables the Define prices as VAT Inclusive setting for you.

Remaining VAT Exclusive: Because some organizations need to handle order and registration prices as VAT-exclusive (such as for B2B sales), iMIS allows you to remain VAT exclusive. In this mode, all of the prices you define or override for events, products, freight, and handling are net amounts that exclude the VAT component, and iMIS adds the VAT separately during product ordering and event registration in Desktop.

Understanding VAT Exclusive:

- VAT-inclusive under the hood: Even though VAT-exclusive pricing appears the same as before, all order and registration pricing is now saved as VAT-inclusive. That is, being configured to remain VAT Exclusive just controls how you see and enter the data, converting your net amounts to and from the underlying VAT-inclusive amounts dynamically.
- Upgrading VAT-exclusive order data: Because iMIS now stores all order and order line amounts as VAT-inclusive, DB Upgrader takes care of updating all of your existing order data to be consistent with your new order data. Flags on the record ensure that the update occurs only once, and your original data is backed up (Orders_BAK and Order_Lines_BAK). This universal change to storing order amounts as VAT-inclusive is unrelated to whether you enable Define prices as VAT Inclusive.
- VAT-inclusive public prices: Even if you use VAT-exclusive pricing, the cart on your website will show your shoppers VAT-inclusive product prices and shipping/handling fees (if you enable taxing when defining add-on charges), to comply with sales tax rules. Order data is always stored VAT-inclusive.
- Tax Code values to substitute and explain 0% VAT rates (optional) – If you populate them, these optional fields help you document the reason for VAT exemptions. The look-up lets you select from your existing zero-rated VAT tax codes to specify ones to globally

substitute as "reason" codes for each of three situations: the contact is VAT Exempt, is registered in a different EU country, or is outside of the EU altogether. In the same way, Event VAT Rules also let you select a Substitute Tax Code for any rule that prevents taxation (see Defining VAT Rules for Events). These codes allow you to report and document tax exemptions as required.

Implementing Advanced PCI Compliance options

Implementing Advanced PCI Compliance options in iMIS is only one small part of your organization's journey. Completing the questionnaire is your first step toward certification: you then arrange for an Authorized Scanning Vendor to test each of your e-commerce IP addresses for security flaws, and after that you apply for certification. It can cost about $100 for scanning of one IP address and help in submitting the questionnaire.

The Payment Card Industry Self Assessment Questionnaire lets your organization determine if you meet mandated security levels for handling credit card transactions. The bulk of the questionnaire deals with firewalls and with clerical and network procedures. It focuses on the effects of software such as Microsoft Windows and SQL Server, as well as network authorizations and security. It does not apply to the vendors of the software you use, but the design of the software can affect what you must do to stay in compliance. Be sure to follow our guidelines for how to implement iMIS for optimal security.

Note: There are a number of versions of the Questionnaire. Customers that maintain the audit log (option 1, below), must use version SAQ-D. However, if you do not retain cardholder information (option 2) and if you meet other security requirements, including segmenting iMIS from less secure systems, you may be able to use the much shorter SAQ-C. Note that iMIS version 15.1.2 was validated as meeting PCI requirements and is listed on the PCI web site as such.

To set up Advanced PCI Compliance support

1. From the Configure accounting options window, select Edit.
2. Check Advanced PCI Compliance.

Caution! If you bypass these options by putting payment card data into user-defined tables or by using custom encryption methods, you are responsible for PCI Compliance in the handling of that data.

3. Select one of the following options:

   Maintain audit log when cardholder information is accessed

   This option causes iMIS to perform audit logging each time a user accesses any card-holder information; no log entries exist for access that occurs before the option is enabled or after it is subsequently is disabled. It also logs attempts to access this information by outside processes, such as SQL scripts.

   Do not retain cardholder information (requires purge and disabling of deferred payments)

   This option prevents iMIS from storing any cardholder data. To use this option, you have to disable all CCAuth accounts configured for deferred authorization (or have all related Cash Accounts removed). If you need to support deferred payment card processing, you must use the other option.

   Note: If Do not retain cardholder information (requires purge and disabling of deferred payments) is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

4. Click Save.

5. If you chose Do not retain cardholder information (requires purge and disabling of deferred payments, open DB Maintenance (Start > ASI > iMIS > Tools > iMIS DB Maintenance Utility) and complete the database preparation steps for your option on the PCI tab, below.

   DB Maintenance: PCI Compliance

   Depending on which option you choose in AR/Cash Setup, implementing advanced PCI Compliance (see Implementing Advanced PCI Compliance options) support requires changes to your iMIS database:

- remove all existing cardholder information from your iMIS system that predates your new security measures
- reset the encryption keys (including removal of previous keys) and re-encrypt cardholder data each year, as required

  DB Maintenance lets you complete these processes easily and reliably.

  Precautions for using DB Maintenance

- Verify that you have a valid backup of your iMIS database before running DB Maintenance commands that modify the database.
- Ensure the database is protected from updates before modifying it, to prevent failures and data problems from changes occurring while entities are being reset/rebuilt/removed:

1. Have all users log out.
2. Stop webservers from updating the database, such as by stopping the AppPool in IIS.

- While users are logged in, you can safely run Analyze Database and Table Details; however, analyzing the database can affect performance.

  To reset encryption keys and data

  To maintain PCI compliance with stored cardholder data, you must complete all of the following steps:

1. Choose a time when the database can be offline for several hours. Re-encryption can take minutes or hours, depending on your data. Once started, re-encryption must not be stopped.
2. In DB Maintenance, open the PCI tab.
3. To start the purge, click Reset Encryption Key and Data.

   A warning prompts you to confirm the process.
4. Allow the process to complete without interruption.

Caution! You risk data corruption if you interrupt the process or close DB Maintenance, which appears unresponsive.

The output of the process displays in the main window of the utility.

5. Click Remove Historical Encryption Keys, or, if postponing that purge, skip to the next step. If you do the purge later, be sure to recycle the application pool then, too.

   Caution! Once you remove previous keys, clicking on any encrypted links that have already been embedded in emails (such as create new account emails) will no longer work. The user will see the error "Your session has timed out. Please try your operation again".

6. Recycle the IIS Application Pool (iMISApp AppPool) for each application server that uses this database.

   To purge cardholder data

   Important: If you implement PCI Compliance (see "Implementing Advanced PCI Compliance options") with audit logging and later switch to storing no data, be aware that this purge routine leaves the existing audit log (PciAuditLog table) intact.

   Deferred transactions are lost in a purge, so you need to resolve deferred data and disable settings that allow it.

1. Find and change any gateway that is configured for Deferred Authorization:

1. From the Configure accounting options window, click Credit Card Auth.
2. Under Current Accounts, select the first gateway listed.
3. If it is set to Deferred Authorization, change it to Immediate Authorization or Manual Authorization.
4. Repeat for all other gateways.

2. Submit any deferred transactions that are pending:

1. Go to Continuum > Commerce and Customer Service Reports > Credit card reports.
2. Run Print Deferred Pre-authorization Report.

3. Run Submit Deferred Authorizations.

   Any deferred transaction remaining after the purge has no payment information, so it must be re-entered manually.

3. In DB Maintenance, open the PCI tab.
4. To start the purge, click Purge All Cardholder Information. A query runs and the Purge Payment Card Information window opens, reporting the number of records with cardholder information in each table that will be cleared by the purge.
5. If the report identifies no problems and you want to complete the purge, select Continue with Purge to clear the cardholder information from the database. The output of the process displays in the main window of the utility.

Using special characters in file path/name

Use two special characters, question mark (?) and number sign (#), in designated file names to have iMIS generate incremental and entity-specific file names when it creates export files.

Question mark symbol

Use the ? symbol to create file names that iMIS increments sequentially at each export. This value is stored in Counter.LAST_VALUE for Counter_name='GL Interface' and will continue to increment indefinitely.

For example, glint?.txt produces glint1.txt, glint2.txt, and so forth.

Number sign symbol

If you are using multiple entities and need separate export/import files generated for each entity, then use the substitution character # to insert the entity code into the generated file names.

For example, if you are exporting data for an entity called NFP (not-for-profit) and the file name designation is #glint.txt, the export file NFPglint.txt will be generated containing only the transactions that belong to the NFP entity.

The new data is not appended to the NFPglint.txt file each time you export data for this entity. The NFPglint.txt file is overwritten, unless you enable the Don't allow file over-writes option in the General Ledger Interface window.

? and #

These special characters can be combined in a single file name.

For example, #glint?.txt produces NFP export files NFPglint1.txt, NFPglint2.txt, and so on.

Note: There are no character limitations in iMIS for the file name. However, you should verify any limitations that may be imposed by your third-party GL package.

Set up products

The following iMIS windows use the information on the Set up products window:

- Enter and edit sales transactions – You must first define all sales-related detail items recorded in a sales transaction as products on the Set up products window.
- Enter and edit orders – As you enter sales line items, you must enter the product codes directly or use the standard lookup window to select a value.
- Enter and edit credit memos – All adjustment-related line items recorded on the Enter and edit credit memos window must reference a product code entered on the Set up products window.
- Enter and edit debit memos – All adjustment-related line items recorded on the Enter and edit debit memos window must reference a product code entered on the Set up products window.

To define product codes

1. From Set up products, click New.
2. Enter a Product Type, or click the lookup icon to select a value.
3. Enter the product Code. Special characters such as hyphens are not allowed.
4. Enter a Title that you want displayed on reports.

5. Enter a description of the product in the Desc. field.
6. Enter a Regular Price and a Non-Member Price.
7. Enter the G/L Acct, or click the lookup icon to select a value.
8. Enable the appropriate Taxable option if the product is subject to a sales tax.
9. Click Save.
10. (optional) Click Special Prices to open the Special Pricing window.
11. Click New.
12. In the Type field, enter a Customer Type or Customer Type/category combination.
13. In the Description field, enter a name for the special pricing rule.
14. Select a pricing option. For example, select Numeric Table for quantity pricing.
15. In the Source Field, enter the field whose value is the basis for determining the Special Price. For example, for quantity discounts, the ordered quantity is the determining field:

    Order_Lines.QUANTITY_ORDERED

    For each quantity discount pricing level, enter the following:

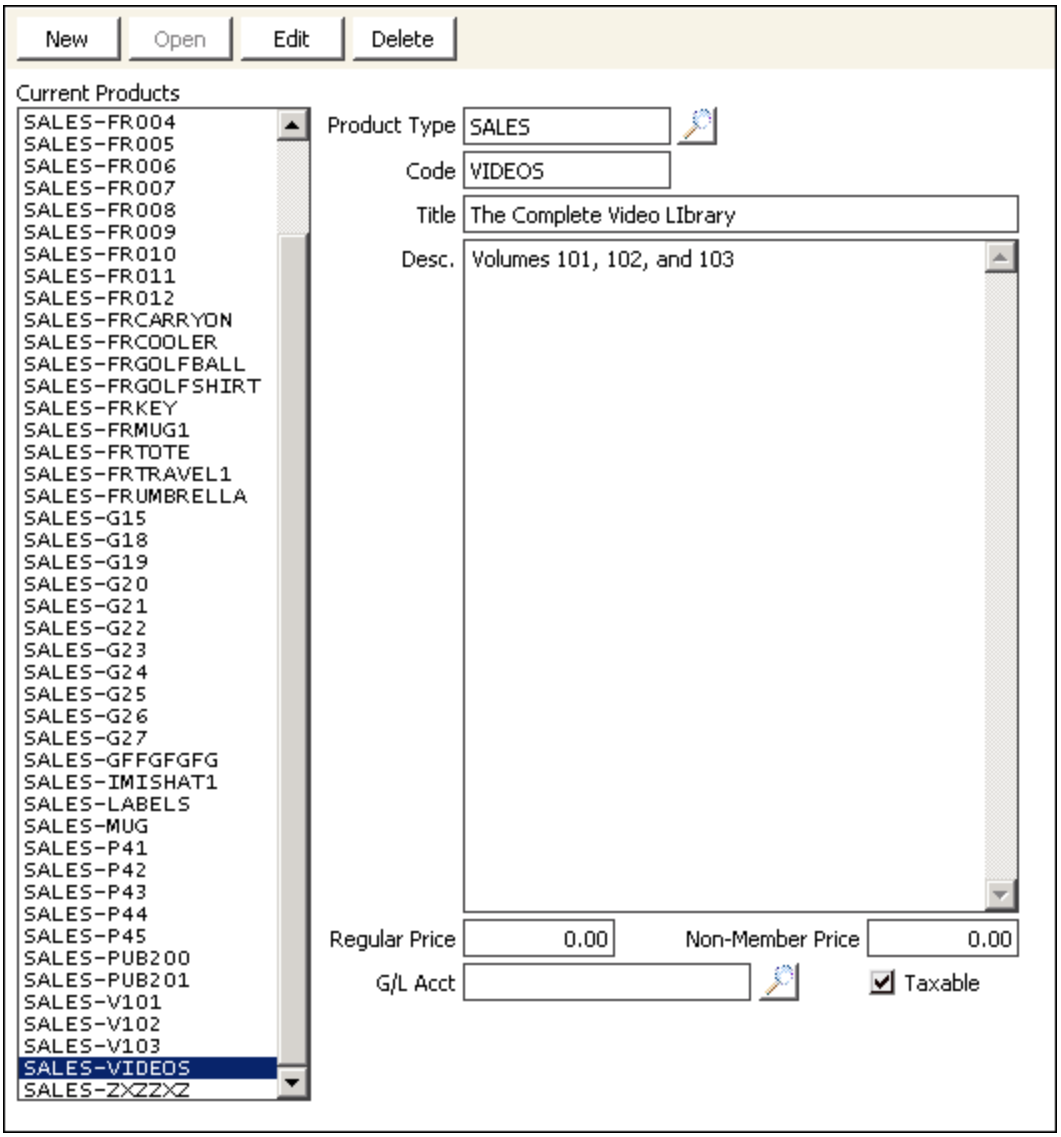
- Units/Code – The required quantity necessary to receive the quantity price break
- Base Amount – The extended amount of the initial quantity, for example, the value in the Units/Code field times the Amt/Add'l Unit (special unit price) = Base Amount
- Amt/Add'l Unit –The per unit special price amount

The following is a calculation example to determine the special price (discount) if a customer orders a product in volume.

- Line 1 = $50 per unit
- Line 2 = $40 per unit, if the customer orders 10 or more
- Line 3 = $30 per unit, if the customer orders 25 or more

16. Click Save.

Set up products window



Admin Console: Accounting > Options > Set up tables > Set up products

Desktop: AR/Cash > Set up tables > Products

Current Products

All defined products are displayed in this drop-down list.

Product Type

Dictates which iMIS module relates to the product record. All AR window data entry products must share the common product type of SALES. You can use the lookup icon and select a value.

Code

Assign a primary abbreviation or identification code to represent this product, sales, or adjustment item. There must be one product code for each billable product.

Title

Enter a longer descriptive title for the product or item type. When this product record is referenced on related data-entry windows or reports/inquiries, the product title appears next to the product code.

Desc.

(optional) Enter a note, description, or comment(s) that relates to the product.

Regular Price

Enter the main (default) unit price or the customer price that is automatically applied when you enter a sales line item for this product. You can override this default price while entering data.

Non-Member Price

If you charge a different price for non-members, enter that amount here so that the system can automatically apply the price when this item is purchased by anyone with a non-member status.

G/L Acct

Identifies the GL income account that is credited when entries are made for this product. You can use the lookup icon and select a value.

If you leave this field blank, iMIS records the income for this product in the default Income account you designated on the AR/Cash Default Accounts window.

It is not necessary to establish GL accounts on the product code tables if you are not using a GL interface and you are not relying on specific accounting reports from iMIS.

Taxable

Enable if the product is subject to sales tax.

Tax Code

(Full Order Entry only) Enter the state sales tax code or use the lookup icon and select a value.

Taxable (GST)

(Canadian Taxation only) Enable the Taxable (GST) option to apply Canadian GST taxation to the product.

Taxable (PST)

(Canadian Taxation only) Enable the Taxable (PST) option to apply Canadian PST taxation to the product.

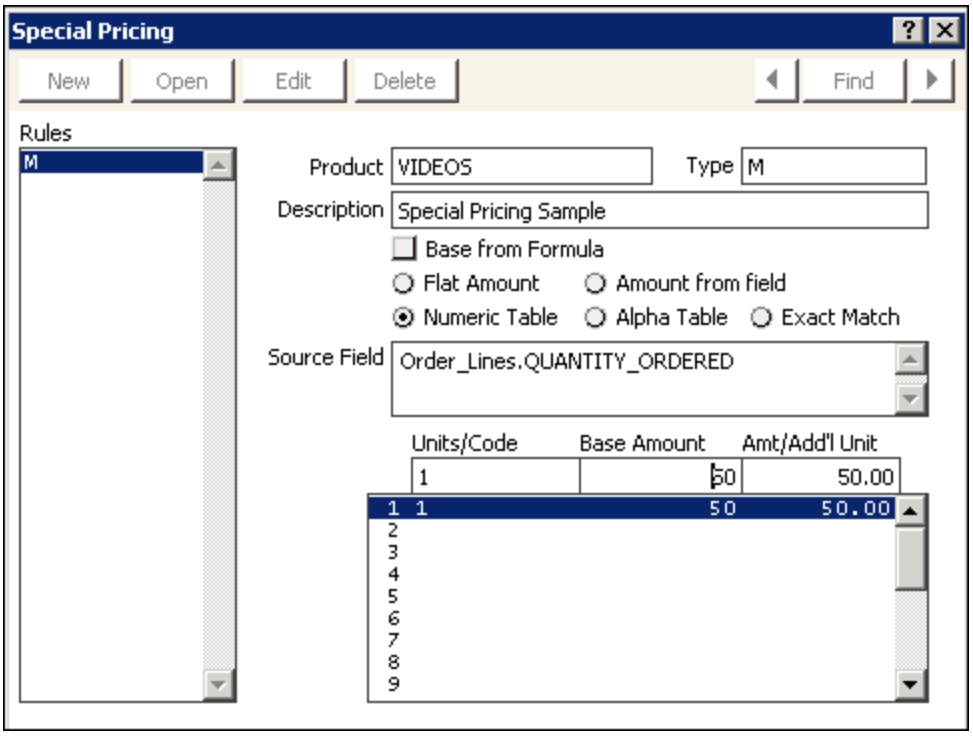
Print

Select to print information on all currently defined products. This information includes product type, product code, product title, and product price.

Special Prices

Opens the Special Pricing window where you can specify pricing based on the Customer Type and other optional categories. The most common use for Special Prices is to provide quantity discounts when someone orders a particular product.

Special Pricing window



Rules

A list of defined special pricing rules.

Product

Displays the product type that was selected on the Set up products window.

Type

Specifies the customer type or the customer type/optional category combination (customer type and category codes are separated by a forward (/) slash.)

To define special prices for a predefined category, open the Set up general look-up/validation window to check for the correct category. To create a new category, see Setting Up Customer Type Categories for Special Pricing.

Description

Enter a detailed description of the billing rule for the specified customer type. This field is for reference only and is not displayed on any bill or report.

Base from Formula

Enable when a formula is to be added to the base amount. This option is available only when the Numeric Table, Alpha Table, or Exact Match option is enabled.

Flat Amount

Use this setting for assigning customer type fees that vary by billing category or rates for non-customer type products whose fees vary by customer type. If you select this option, enter a Base Amount value.

Amount from field

Use this setting to reference an exact rate or to enter a formula that calculates a rate based upon a field. If you select this option, enter
a user-defined field in the Source Field. For example, Name_All.ACTIVITY_FEE, or an SQL calculation that references such fields.

Numeric Table

Use this setting to vary rates according to numeric values. You can establish sliding rates based on income/volume, or rates based on length of certification. This option supports a maximum of 20 rows and prompts you to enter numeric values (units/code) and rates (base amount) that serve as starting levels for applying pricing guidelines. An optional additional per-unit charge can be entered in the Amt/Add'l Unit field.

Alpha Table

This field prompts you to complete a table of alphanumeric values. Like the Numeric Table option, this option looks for a range rather than an exact match. Use this setting to create sliding rates based on values matched to alphanumeric or character fields.

Exact Match

Use this field to restrict a character field to an exact match. Enter a setting to create exact rates based on values exactly matched to character fields.

Source Field

Specifies a user-defined field that references the value entered in the Amount from field field. This option is available only when the Amount from field, Numeric Table, Alpha Table, or Exact Match option is enabled.

Units/Code

Specifies the numeric values that serve as starting levels for applying pricing guidelines. This option is available only when the Numeric Table, Alpha Table, or Exact Match option is enabled.

Base Amount

Specifies a rate that serve as a starting level for applying pricing guidelines. This option is available only when the Flat Amount, Numeric Table, Alpha Table, or Exact Match option is enabled.

Amt/Add'l Unit

Specifies an optional additional per-unit charge. This option is available only when the Numeric Table option is enabled.

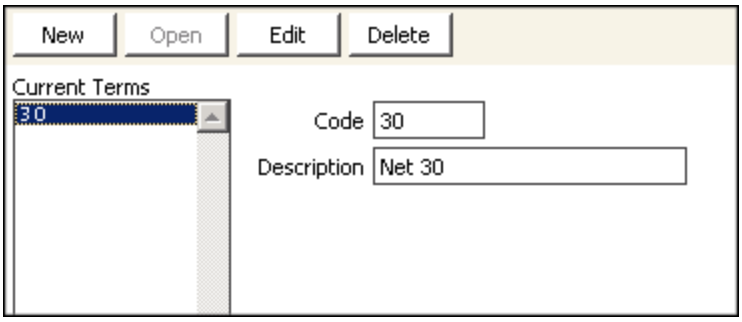
Set up terms

The Set up terms window allows you to define the various customer payment terms that your organization allows. Terms allow you to print an appropriate term's description on Order Entry invoices.

To set up the payment terms

1. From Set up terms, click New.
2. In the Code field, enter the code or abbreviation to create the term category.
3. In the Description field, enter the longer description that you want to see printed on invoices for the term category (for example, Net 30).
4. Click Save.

Set up terms window



Admin Console: Accounting > Options > Set up tables > Set up terms
Desktop: AR/Cash > Set up tables > Terms

Current Terms

This list displays the currently defined terms.

Code

This field specifies the code for the terms.

Description

This field contains a description of the terms.

Set up tax codes

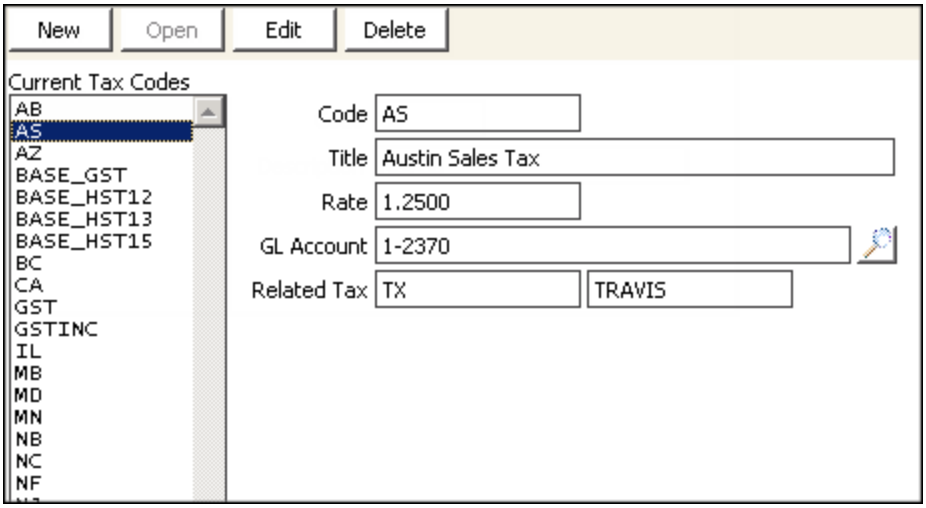
The Set up tax codes window lets you record and use tax information that applies to your product orders.

To enter a new tax code

1. From Set up tax codes, click New.
2. In the Code field, enter the abbreviation you want to assign to the tax category.
3. In the Title field, enter the full name assigned to the tax.
4. In the Rate field, enter the percentage rate assigned to the tax.
5. In the GL Account field, enter the GL account number assigned to the tax, or click the lookup icon to select a value.

6. In the Related Tax field, enter the codes for any other taxes you want to relate to the tax, such as a city or county tax code.
7. Click Save.

Set up tax codes window



Admin Console: Accounting > Options > Set up tables > Set up tax codes
Desktop: AR/Cash > Set up tables > Tax codes

Current Tax Codes

This list displays the currently defined tax codes.

Code

Enter the abbreviation you want to assign to the tax category.

Title

Enter the full name to assign to the tax code. This description helps users select from the available taxes using the look-up function.

Rate

Enter the percentage rate assigned to the tax.

GL Account

Enter the general ledger account number assigned to the tax code, or use the lookup icon to select a value.

If you leave this field blank, iMIS records this entry in the Sales Tax account that you designated on the AR/Cash Default Accounts window.

Related Tax

These fields allow you to use multiple additional Tax Authority codes.

Enter the codes for any other taxes you want to relate to the tax code. As shown on the previous Set up tax codes window, a city tax may always be associated with a county and a state tax. These tax codes must always be set up in distinct accounts so that the taxes can be tracked separately but calculated for the customer as a single amount.

Set up cash accounts

Use the Set up cash accounts window to define the cash accounts where you will record cash deposits and credit and debit card deposits.

It is necessary to create entries on the Set up cash accounts window under the following circumstances:

- If you accept and process credit/debit card receipts, you must create a cash account code to represent each credit/debit card type, along with the cash account where the card receipts should be posted if the card type is unique.
- If you are using batch control, a cash account is required to represent each checking account (even if you have only a single account).
- If you accept in-kind or asset fundraising donations you must set up a cash account for each GL account to which these gifts will be posted.

Defining credit/debit card codes and accounts

In order to process credit/debit card receipts, you must define the card codes on the Set up cash accounts window. This setup allows each card to have a unique bank account, for example, VISA=1020, AMEX=1030, DISC=1040 and so forth. This setup also allows

card payments to override the batch bank account, because each card has its own bank account.

If the batch control option is not enabled, assigning a GL account number to a credit/debit card code takes precedence over the cash account selected for the batch and the default cash account number.

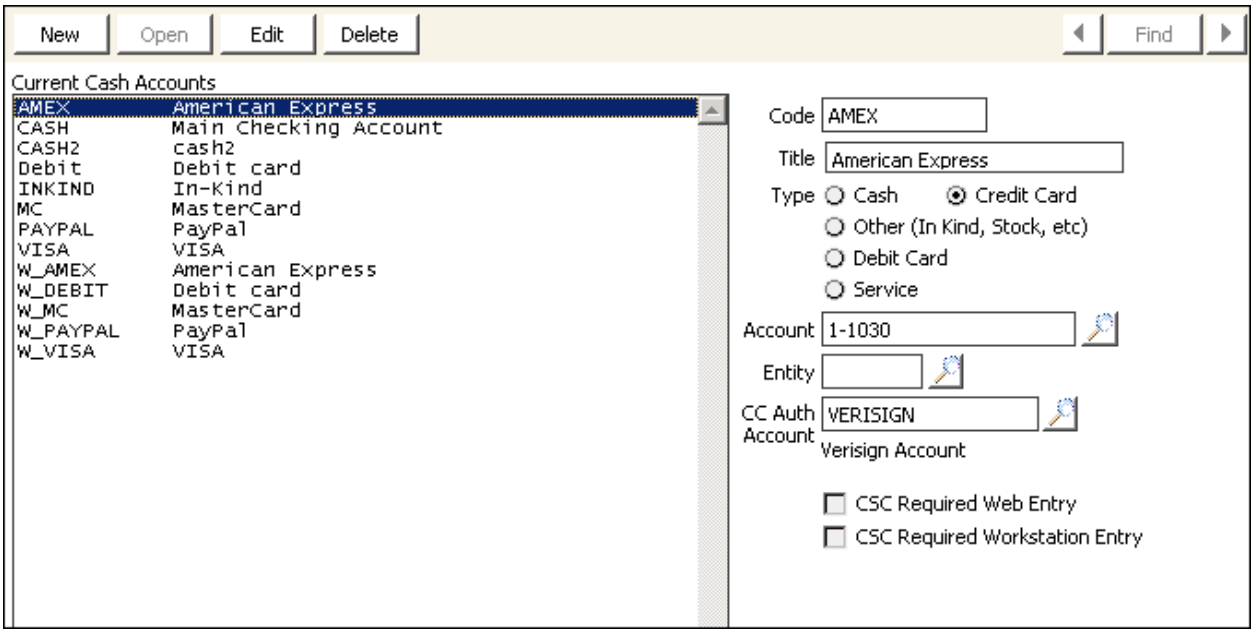
When you use batch control to define credit/debit card code accounts, you can enter both cash transactions and credit/debit card transactions, creating a mixed batch. iMIS splits and posts the payment transactions accordingly.

To define cash and credit/debit card codes and accounts

1. From Set up cash accounts, press New.
2. In the Code field, enter the abbreviation you want to assign to the cash account or credit/debit card type you are creating.

   Note: You can use any code you prefer for a credit/debit card, and you can specify a different entity for each credit/debit card code. For example, you can assign VISA1 to GEN, and VISA2 to BLDG.
3. In the Title field, enter the full name you want to assign to the account.
4. Under Type, select Cash, Credit Card, Other, Debit Card, or Service.
5. In the Account field, enter the GL chart of accounts number for the cash account assigned to this table entry, or click the lookup icon to select a value.
6. (optional) For multiple entities, enter the Entity code, or click the lookup icon to select a value.
7. For the Service option, select a gateway such as PayPal Express.
8. Click Save.

Set up cash accounts window



Admin Console: Accounting > Options > Set up tables > Set up cash accounts
Desktop: AR/Cash > Set up tables > Cash accounts

Current Cash Accounts

This column lists all currently defined cash accounts for recording cash deposits.

Code

Specifies the abbreviation assigned to the currently selected cash account or credit card type.

Title

Specifies the full name assigned to the cash account. This description helps users select from the available cash accounts in a lookup window.

Type

Specifies one of the following account types:

- Cash – Specifies that the account is a checking or other deposit account (other than a credit card account).

- Credit Card – Specifies that the account is a credit card account.
- Other – Specifies that the account is a non-cash asset account.
- Debit Card – Specifies that the account is a European debit card account.
- Service – Specifies that the account is a third-party payment service, such as PayPal Express.

Account

Specifies the GL chart of accounts number for the cash account.

Entity

(Only required for multiple entities (see "Multiple Entity Processing")) Specifies the code for the entity that owns this cash account.

Note: The following items are available when an item is selected in the Current Cash Accounts list only.

CC Auth Account

Specifies the Account Code of the credit card authorization account as set up in the AR/Cash Credit Card Authorization window.

CSC Required Web Entry

Requires entry of a card's CSC number in payment entry windows in the web-based views of iMIS. When cleared, card information can be submitted without the CSC number in web payment entry windows. This must be set up for each individual credit card or debit card account.

CSC Required Workstation Entry

Requires entry of a card's CSC number in payment entry windows in iMIS. When cleared, card information can be submitted without the CSC number in payment entry windows in iMIS.

Display Issue Number

Displays a field for entering a European debit card's issue number in payment entry windows. When cleared, the Issue Number field is not displayed in payment entry windows.

Display Issue Date

Displays a field for entering a European debit card's issue date in payment entry windows. When cleared, the Issue Date field is not displayed in payment entry windows.

Set up due to/due from

If you use one entity's cash account to receive income meant for a different entity, you must set up DueTo/DueFrom accounts to ensure that your accounting records are correct.

Correcting balancing problems

iMIS generates DueTo/DueFrom entries for configured entity relationships when transactions are sent to the general ledger. These entries correct balancing problems created by entities receiving cash for which they do not have matching income, and entities receiving income for which they do not have matching cash.

Due to owner entity

This liability entry is created for the entity that owns the cash account that received the money but is not entitled to the income. This liability entry offsets the cash the entity received but did not own.

Due from cash entity

This receivable entry is created for the entity that owns the income to make up for the asset it is entitled to but did not receive.

Setting up DueTo/DueFrom accounts

DueTo/DueFrom accounts are set up in the Set up due to/due from window. Create one entry for each multiple-entity combination where cash will be received by one entity for a transaction that belongs to a different entity.

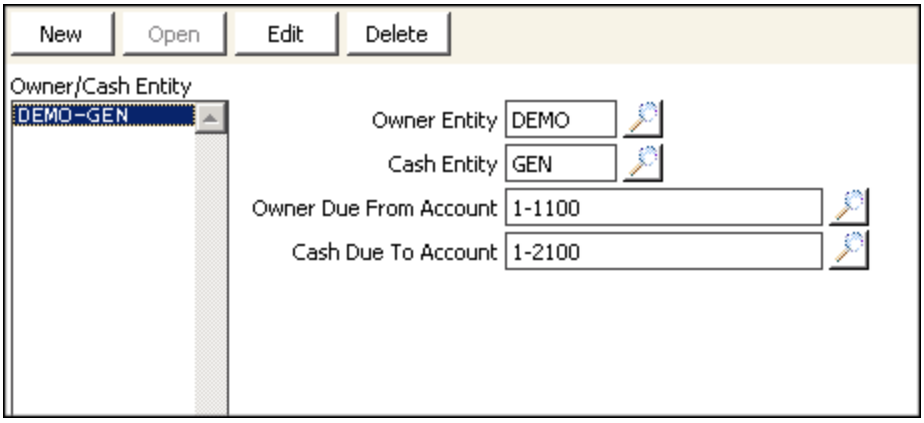
The Set up due to/due from window enables you to define the DueTo/DueFrom relationships between your general ledger accounts.

In this window, you can set up entries for each multiple-entity combination in which cash is received by one entity for transactions that belong to another entity.

To set up Due To/Due From accounts

1. From Set up due to/due from window, click New.
2. Enter the Org Code for the entity that owns the income or accounts receivable in the Owner Entity field, or use the lookup icon to select a value.
3. Enter the Org Code for the entity that received the cash in the Cash Entity field, or use the lookup icon to select a value.
4. In the Owner Due From Account field, enter the GL account in which to record the inter-company receivable (debit) transaction for the entity that owns the income, or use the lookup icon to select a value.
5. In the Cash Due To Account field, enter the GL account in which to record the inter-company payable (credit) transaction for the entity in which the cash account resides (cash entity), or use the lookup icon to select a value.
6. Click Save.

Set up due to/due from window



Admin Console: Accounting > Options > Set up tables > Set up due to/due from
Desktop: AR/Cash > Set up tables > DueTo/DueFrom

Owner/Cash Entity

Lists Due To/Due From accounts specifying the source entity and the destination entity.

Owner Entity

Specifies the entity that owns the income.

Cash Entity

Specifies the entity that owns the cash account for the cash received.

Owner Due From Account

Specifies the receivables account number for the entity that owns the income (debit).

Cash Due To Account

Specifies the liability account number for the entity that received the cash (credit).

Address Verification Setup

Accumail and Prosort

The iMIS Postal Modules is the full-featured package that helps you automate your mailing labels so you can receive the maximum allowable discounts from the U.S. Postal Service.

To obtain automation and accuracy in your mailing labels, iMIS has partnered with industry leaders in postal software. This combined technology gives you the ability to add Zip+4, carrier route and delivery point to the addresses in the iMIS database, and to print your labels in the correct order required by the U.S. Post Office complete with delivery point barcodes and DPV (Delivery Point Verification). Refer to the AccuMail documentation for details about label standards and information.

AccuMail

AccuMail™ matches addresses within your iMIS database against the national database of addresses from DataTech. If matched, the iMIS AccuMail module updates your iMIS member records with Zip+4, carrier route, delivery point, and optionally county name and US Congressional district. You can either verify all addresses within the database or verify while the data is entered. Additionally, you can browse the national database in order to correct addresses. The national database typically comes in the form of a DVD but may be stored on a server. Based on your subscription, you receive updated information at regular intervals.

ProSort

ProSort™ uses the names and addresses that have been verified through AccuMail and prepares mailing labels. ProSort sorts the labels and prints delivery point barcodes in order to maximize postage savings.

Note: Note: In order to integrate these modules within iMIS, you must obtain a new Licensed Products key from your AiSP.

Implementing Postal Modules

Make sure you have the following media available before you begin an installation or update:

- AccuMail DVD or files downloaded
- ProSort media
- Update media if updating

> **Note:** Note: The postal tools AccuMail and ProSort are available only in a Windows environment.

To integrate the software with iMIS, please ensure the following:

- Specify x:\AccuMail as the install directory for both products, where x can either be a shared drive on your individual PC or on the network, realizing that users must have drive mapping and permissions for this shared drive.
- The national database of addresses is maintained on a DVD and each iMIS user must have access to the database. To obtain access for users across a network, use one of the following options when installing the AccuMail software:
- install locally for each iMIS user (not recommended for performance and update efficiency reasons)
- install to a network drive (recommended installation configuration)

Note: Refer to AccuMail documentation for the space requirements. When installed, it may take up more than 2 GB disk space.

> **Note:** Note: Please do not call DataTech for technical support or for new CDs: Support is available through your AiSP or through ASI Technical Support.

Installing AccuMail

> **Note:** Note: This installation is performed during initial implementation and each time a new DVD is received.

1. Insert the AccuMail DVD in the install drive. If you do not have a DVD drive, you must download files to install.
2. Follow the instructions on screen to install the software. One of the options is whether to install to a network location or install locally. If you choose to install locally you must repeat the installation process for each computer.
3. Follow the instructions shown in the next section to install ProSort.

Installing ProSort

AccuMail must be installed prior to the ProSort installation. Refer to the previous section.

1. Insert the ProSort Setup CD into the drive.
2. Follow the instructions on screen to complete the installation.

Upgrading AccuMail

If you update AccuMail from the same workstation as it was installed previously, it prompts you to install new or modify an existing installation.

> **Warning!** Caution! Perform the installation from a workstation computer. Do not install directly from the server computer.

1. Insert the AccuMail DVD in a workstation's DVD drive.
2. Choose the network installation option to install the updates to a network drive for multiple users to access, or choose the local installation option to install the updates to the local computer for that computer.

Using Postal Modules with iMIS

Benefits of using Postal Modules

The U.S. Postal Service provides a discount to mailers who can “automate” the labels for their mailing. To receive Automation rates, the mailer must print a bar code representation of the mailing address on the label. The closer the mailer can come to pinpointing the mailing address, the higher the discount. A higher discount is given to those mailers who can provide the carrier route and the delivery point. These fields identify the actual postal carrier route and the actual place of delivery along that route. The mailer receives discounts for bundling the mail pieces when 10 or more pieces go to a same 3-digit or 5-digit zip code.

The iMIS Postal Modules provide you with the ability to add Zip+4, carrier route, and delivery point to the addresses in your database and to sort and print your addresses so that you may receive the maximum allowable discounts. To accomplish this, iMIS has partnered with the industry leader in postal software, Group 1. Group 1 has developed software called AccuMail to CASS (Coding Accuracy Support System) certify addresses. In order to certify an address, it is compared with AccuMail’s national database of addresses. If the address “matches” an address in the database or can be modified slightly to match an address, the Zip+4, carrier route, and delivery point are added to the address record within your iMIS database. Optionally, the county name and congressional district can be added to your iMIS database. AccuMail prints the U.S. Post Office form 3553, which is required to receive the automation rates.

In addition to the ability to CASS certify your iMIS database, the integration of AccuMail with iMIS gives you two more features. You can verify or match addresses as they are entered into the iMIS database or anytime there is a change of address. You can also view the addresses that don’t match and browse the national database of addresses to correct them.

Group 1’s ProSort will organize and print name and address labels from your iMIS database so that you get the maximum discount possible. ProSort is PAVE (Presort Accuracy Validation and Evaluation) certified software and groups the labels by zip codes and carrier routes and prints the bar codes on the labels. It also prints the U.S. Post Office required forms that are required for claiming the PAVE automation rates. ProSort is capable of calculating your savings on each mailing.

> **Note:** Note: U.S. Post Office rules and regulations are discussed in detail in Publication 28, USPS Addressing Standard Guidelines and Publication 25, Designing Letter Mail. Contact a postal business center for complete services.

The following sections discuss how to use the AccuMail and ProSort features with iMIS. Refer to the AccuMail and ProSort manuals that accompanied your software for complete product information.

Verifying batch addresses

The batch address verification procedure allows you to match or verify a subsection or all of the addresses in your iMIS database.

> **Note:** Note: This procedure updates a large number of the database records; therefore, it must run with only one user logged into the system.

1. Select Membership > Utilities > Other Data Utilities > Verify Addresses from the main menu. A warning displays about the length of the process; click Yes to continue or No to cancel.

   The Verify Addresses window opens.

2. Check the addresses you want to verify.
3. Check the Include ONLY Active Members box if you want to ignore all inactive, suspended, or deleted member records.
4. Enter specific member types, separated by commas, in the Member Types box if you want the program to only verify those types of members.
5. Include a date in the Include addresses verified prior to box if you do not want to verify addresses that have been verified and have not changed since the date entered. With this option, addresses verified prior to this date or any changed address will be verified now.
6. Check the Print CASS Report and Print Error Report boxes if you want to print the U.S. Post Office 3553 CASS report and an error report. The CASS report will print to your default printer, while the error report will print to the destination you have currently

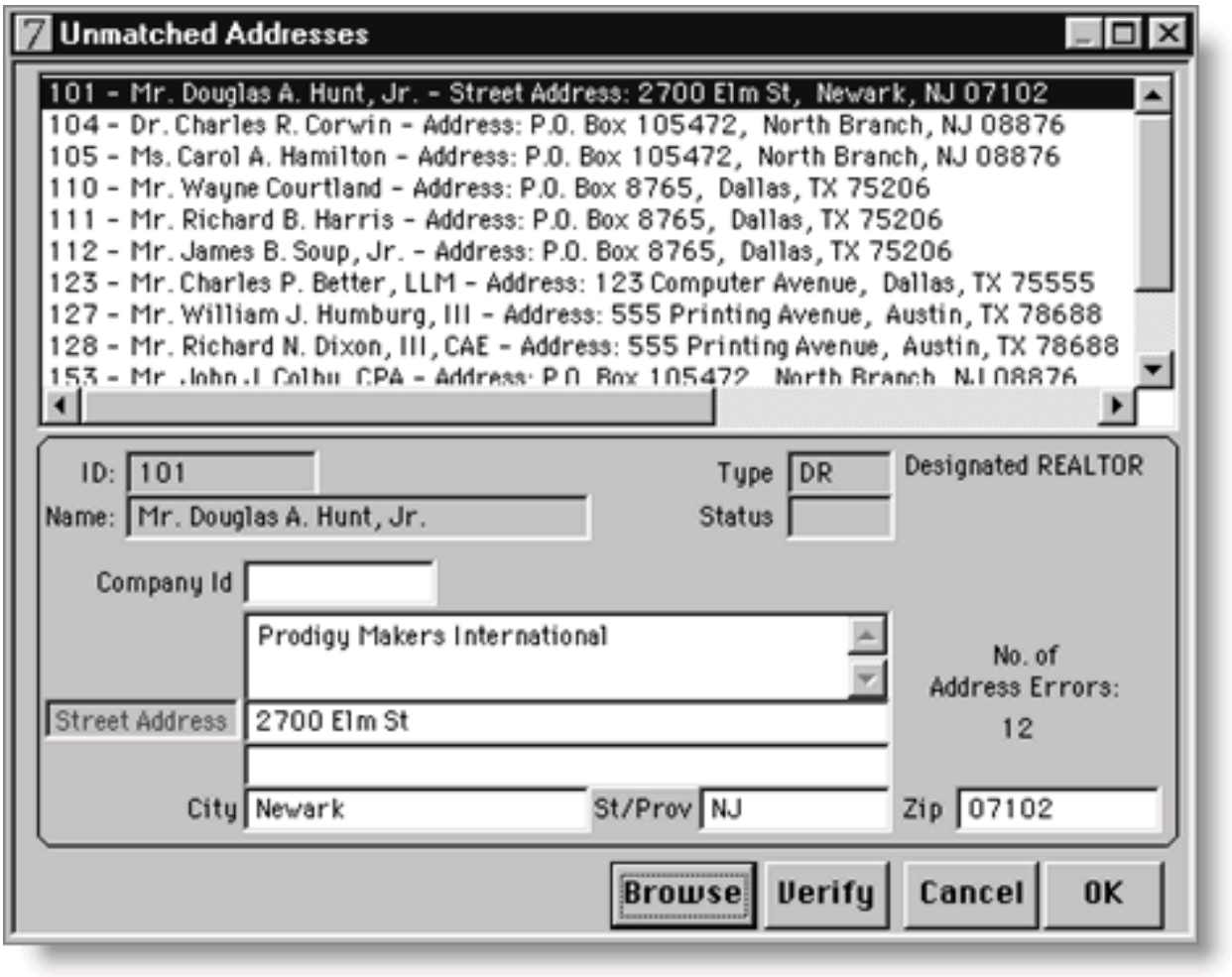
selected for your iMIS session. The CASS report gives you the number of addresses that met the specified criteria and the percentage successfully matched. The error report lists the addresses that did not match and a brief description of the problem.

7. Check the Accept Address Correction box if you want to standardize your addresses to meet the U.S. Post Office preferences. For example, with address correction, “Avenue” will be changed to “Ave” and streets that have alias names will be changed to the Post Office accepted name.
8. Click Run.

> **Note:** You may be required to include the CASS report with your mailings; therefore, make sure to make copies of the report. You can generate a current error report at any time by selecting Membership> Utilities> Other Data Utilities> Print Error Report from the main menu.

Reviewing unmatched addresses

Reviewing unmatched addresses allows you to review all of the addresses that were not matched during the batch verify process.



Select Membership > Utilities > Other Data Utilities > Review Unmatched Addresses

The address records are listed in the top section with the details of the selected record in the bottom section:

- The information displayed in the member ID, Name, Type and Status fields cannot be modified. If the member information is linked to a company record, the company information is displayed in these fields.
- The type of address is listed to the left of the address while the reason the address did not match is displayed below the address. The total number of addresses unmatched within the database displays to the right of the address.
- To print the error report, click the Print button.
- To edit the address or to assign this member to another company, click the Edit button.

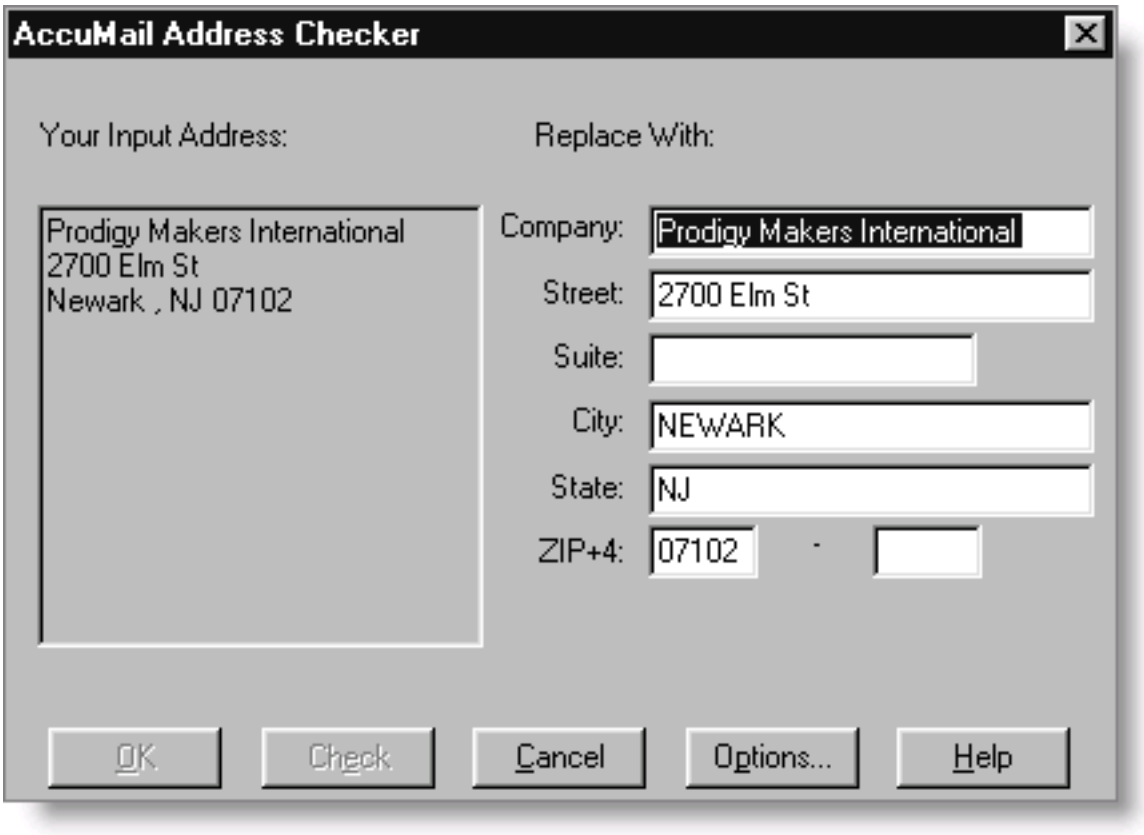
- Enter the correct address information, or to assign this member to another company, press Ctrl+L in the Company Id field to change the company name. Type in the company name or any number of characters in the Begins with field and click OK. A list of companies that match the characters entered is displayed. Select the company and Click OK. You will be prompted to overwrite the old company name address with the selected company information. Click Yes or No.
- When you change the company or address, click the Verify button to attempt to match the new address. If successful, a message displays at the bottom of the screen and the Zip+4, carrier route and delivery point fields are added to the record.
- Once you click the OK button, the record is removed from the screen and the next record becomes selected. If you verify a company record, then all members whose addresses are linked to the company will be updated and removed from the list.

To browse the database

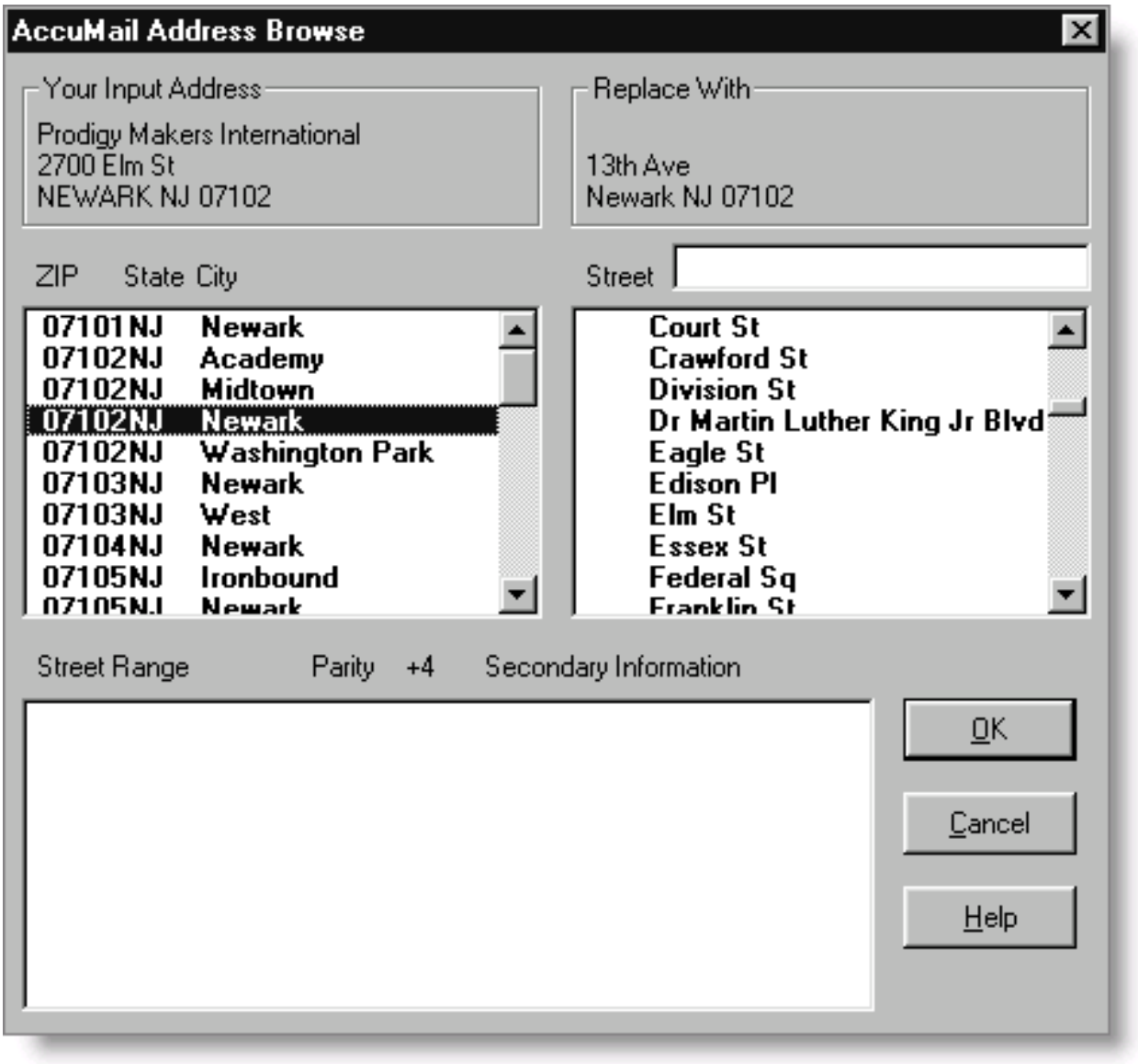
You can browse the database and select address information from a list of possible choices in the database.

1. Click Edit.
2. Click Browse. Two separate error messages describing the reason why a match was not found displays.
3. Click OK after each message to clear the message boxes.

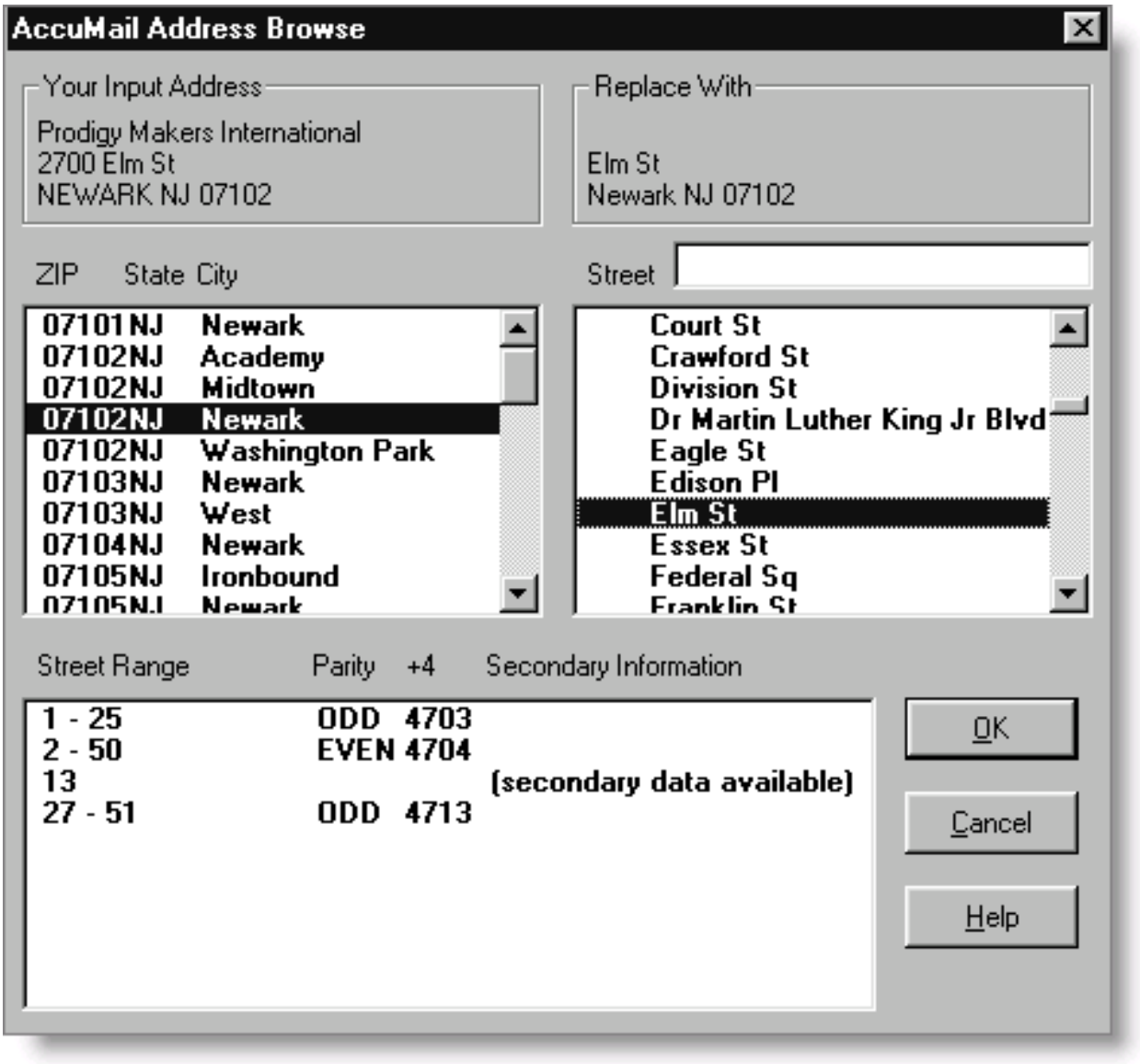
The AccuMail Address Checker window opens.



4. Click Options to open the AccuMail Address Browse window. A list of zip codes that are considered possibilities based on the original address is displayed on the left.
5. Double-click a zip code to see the streets within that zip code listed on the right.

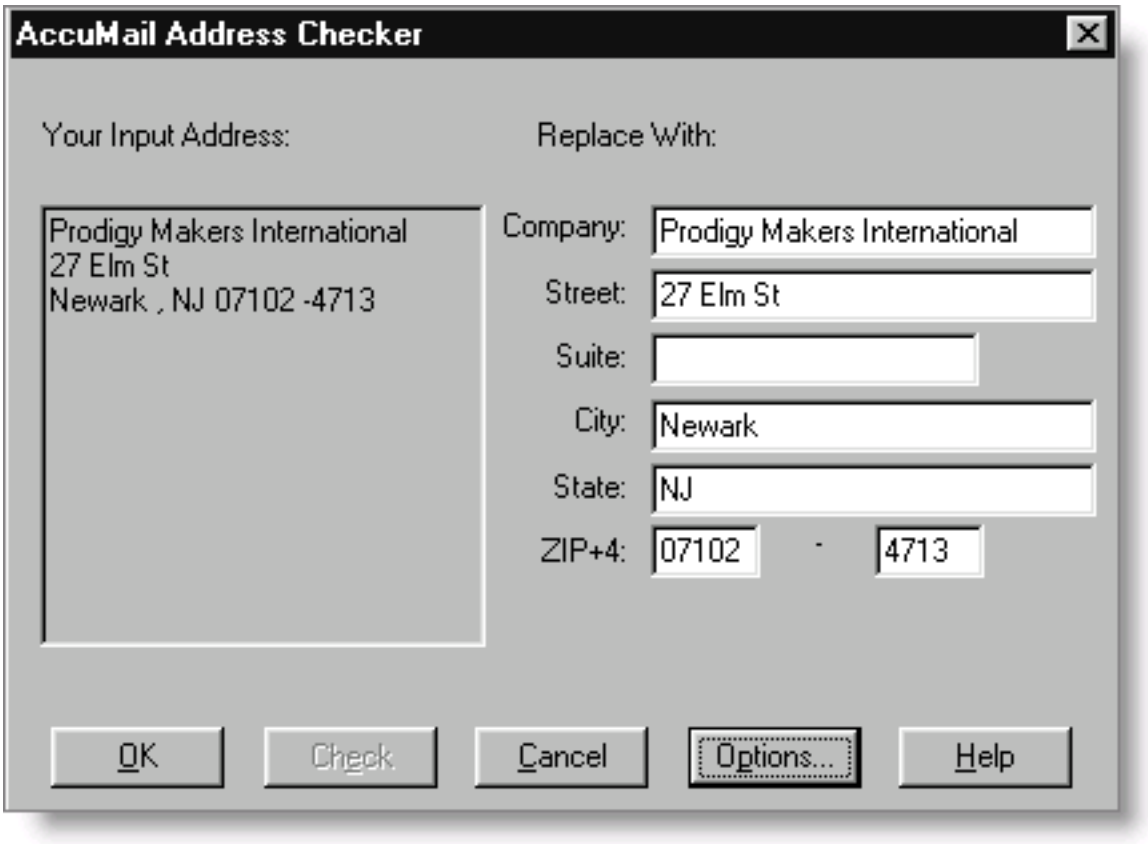


6. Move forward through the list of streets by entering the first few characters of the street address in the Street box. The list will advance to the first street that matches the characters you enter.
7. Double-click a street name to see the address number ranges on that street listed below.

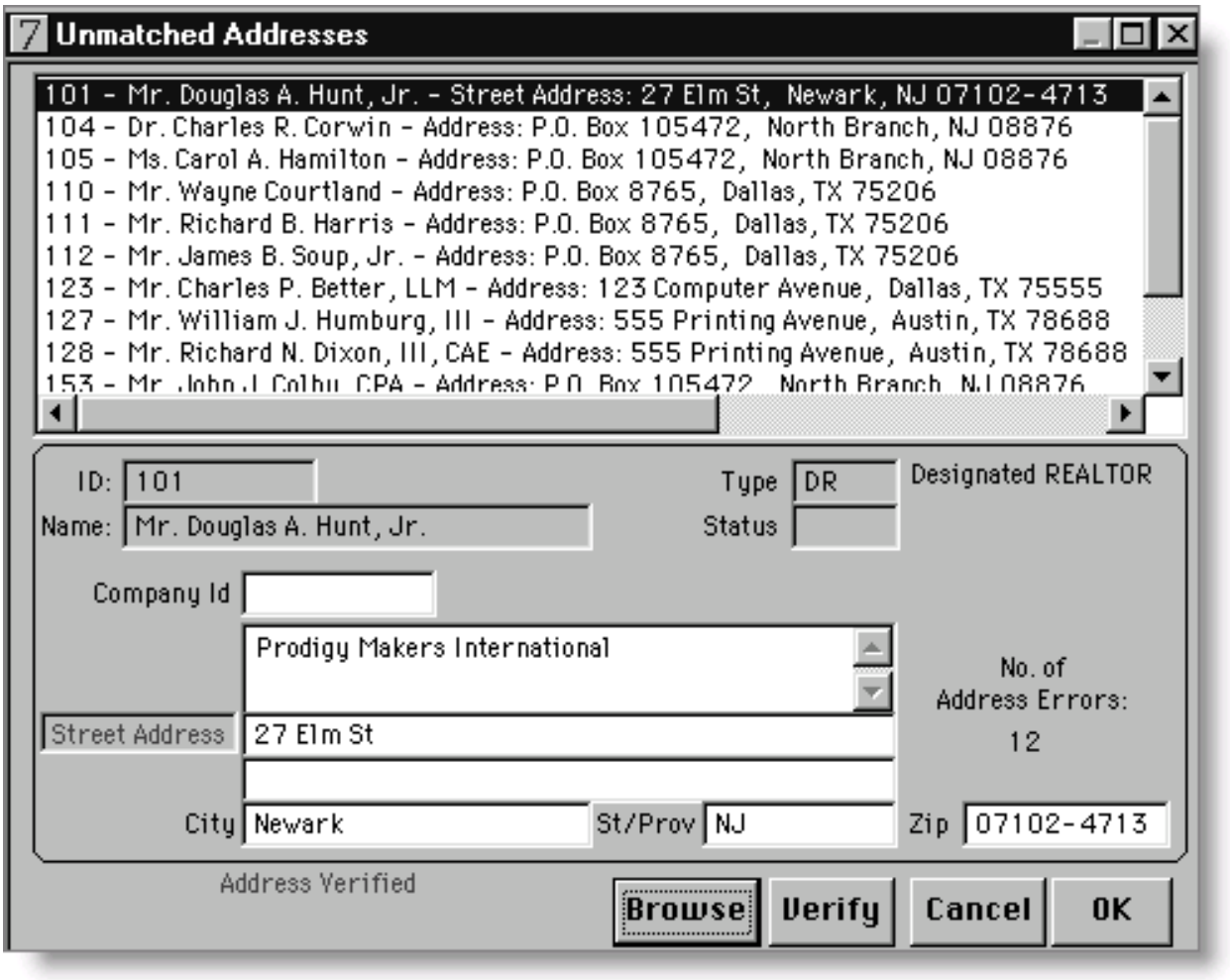


8. Select the appropriate street range in order to match the address and click OK or double-click the street range.

   The AccuMail Address Browse window closes and the selected address is automatically populated in the Replace With field of the AccuMail Address Checker window.



9. If necessary, specify a specific street number and click the Check button in order to get the correct delivery point assigned.
10. Click OK to replace the address in the iMIS database with the address displayed on the right and return to the Unmatched Addresses window.



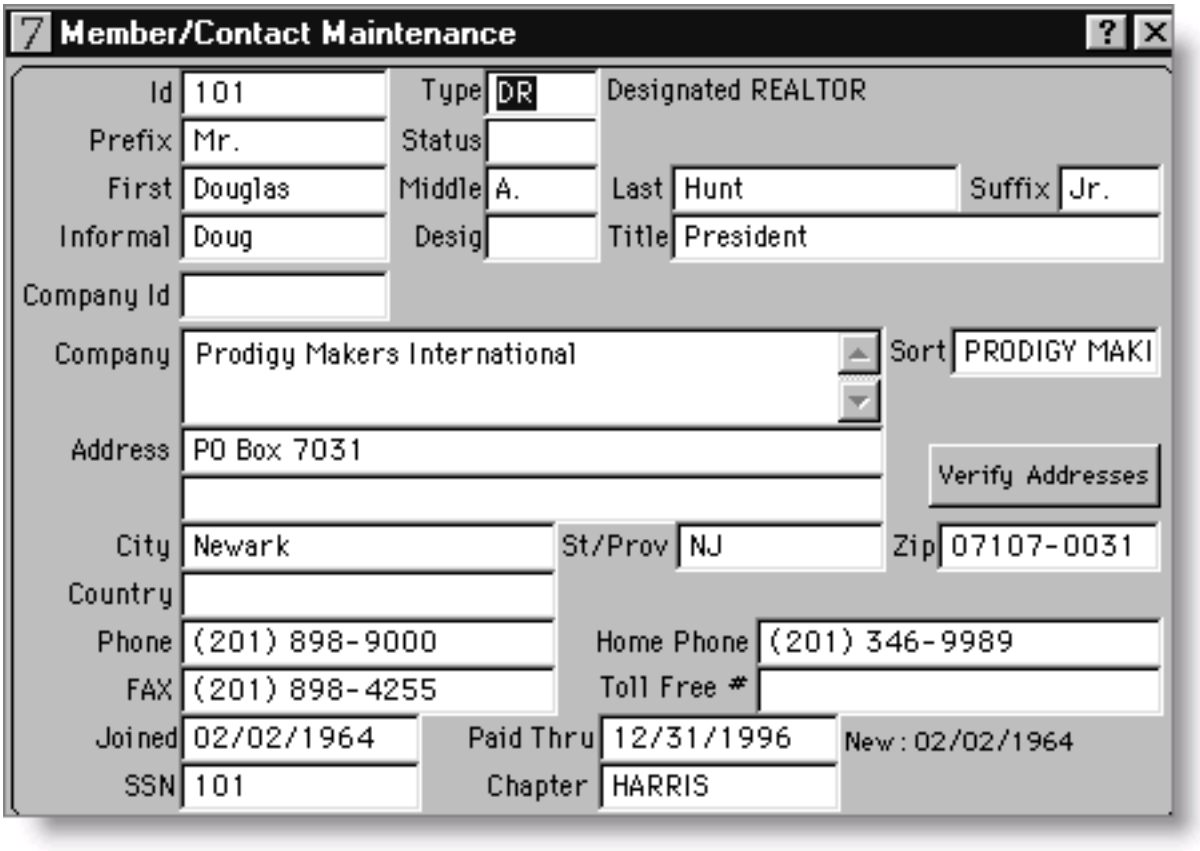
11. Click OK to make the address correction permanent and remove this address from the list. If you verify a company record, then all members whose addresses are linked to the company will be updated and removed from the list.

Verifying addresses online

Online Address Verification is a feature that allows you to verify addresses as you enter or change them. The Verify Addresses button is accessible in the following locations:

- Customers > Manage Customers
- Events > Register a customer > select the Attendees tab
- Orders > Enter and edit orders > in the Bill to ID field, click Add
- Orders > Enter and edit order > select the Ship to Info tab

- Exposition > Process booth orders > click Options and choose Address
- Fundraising > Enter and edit gifts > select the Donor tab
- Fundraising > Enter and edit gifts > select the Soft Credit tab and click Add



Example of the verification of an address

To request address verification

1. Click Edit.

   The Verify Addresses button becomes available. You can click this button at any time during entry or edit.

2. Click Verify Addresses. The system will attempt to verify the member's address(es). If successful, the Zip+4, carrier route, and delivery point fields are added and you receive a message that all addresses were successfully matched. If any of the addresses cannot be matched, the program starts the Browse process.

The system attempts to verify the following:

- All three member addresses in the Member/Contact Maintenance or Address Maintenance window.
- The ship-to address in the Order Entry and Meeting Registration window.

To automatically verify addresses

You can elect to have the system automatically verify the member's addresses every time a member record is saved.

1. Select Membership > Utilities > System Setup from the main menu.
2. Click Address & Notes from the Membership Setup window.
3. Click Edit.
4. Mark the Automatically Verify New/Updated Addresses and Accept Address Correction options.

   Note: Selecting the Accept Address correction option does not override the selection to correct addresses when running the Batch Address Verification process; it only affects online verifications.
5. (optional) Opt to update the county and congressional district fields in the iMIS member database. If you choose this option, you can select which of the three addresses to use in order to determine the appropriate county and congressional district. This option applies to both the batch verify process and the online verification.
6. Click OK.

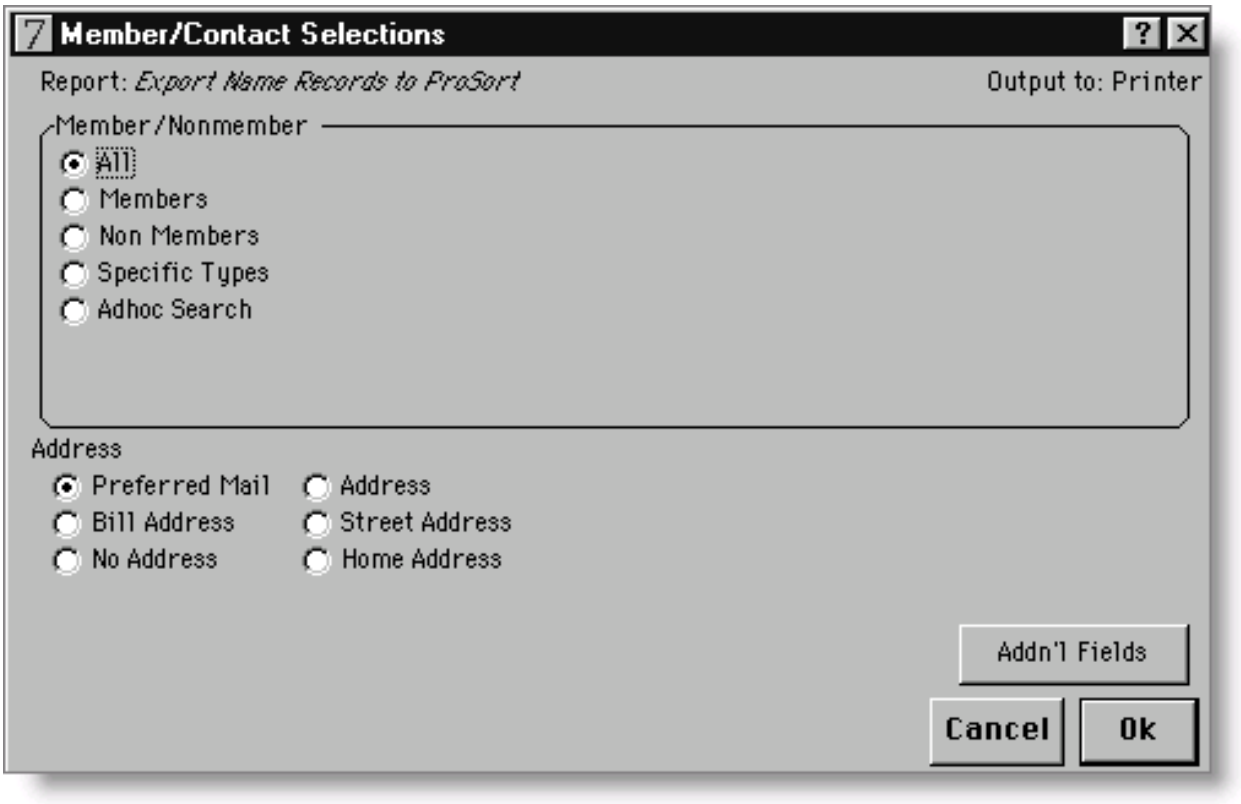
To export records to ProSort

The ProSort feature allows you to print PAVE (Presort Accuracy Validation and Evaluation) certified labels.

1. Select Membership> Utilities> Other Data Utilities> ProSort Export from the main menu.

The ProSort Exports window opens.

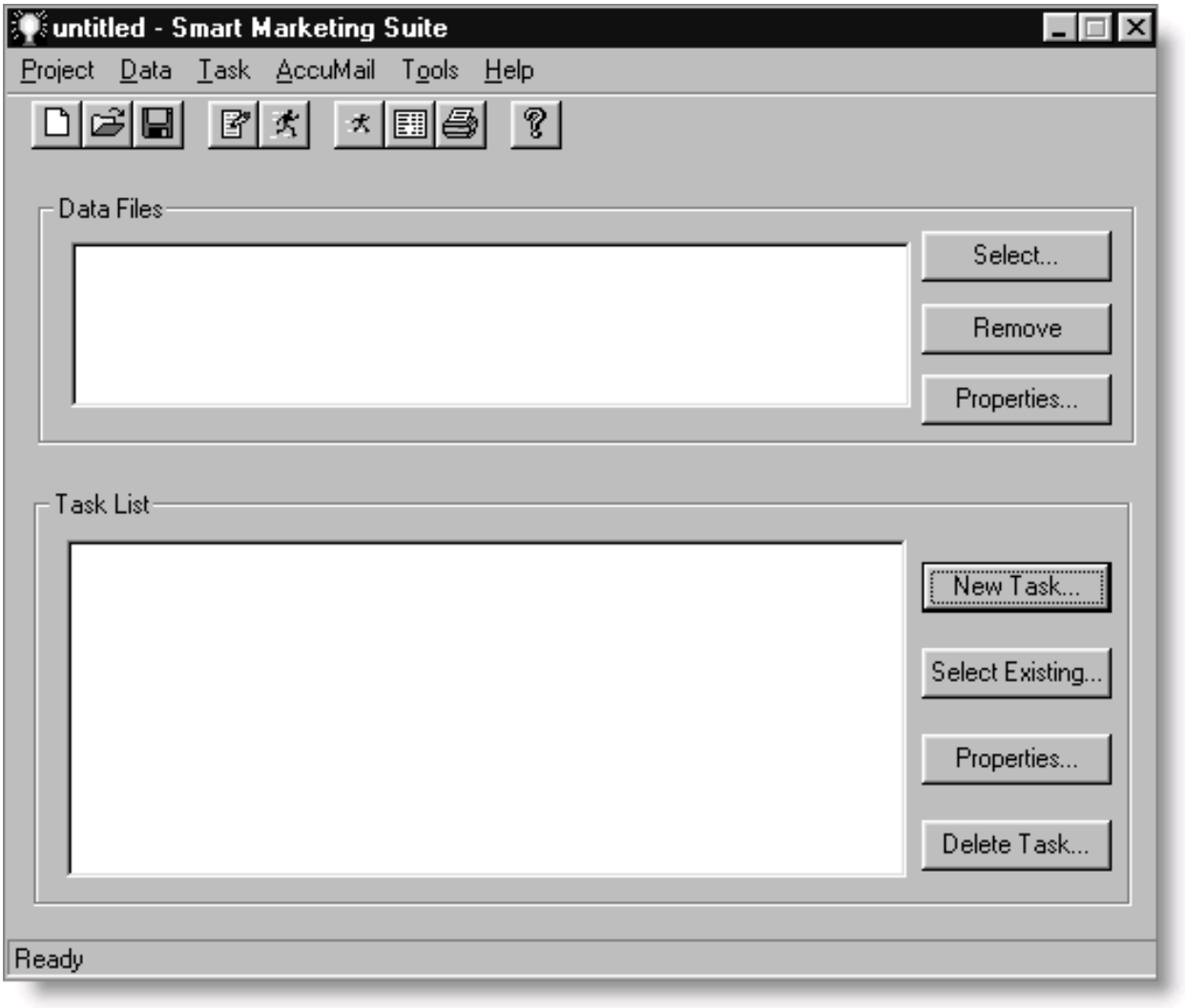
2. Double-click the Export Name Records to ProSort option in the Available Reports area.



The Member/Contact Selections window opens.

3. Use the options on this window to choose the members and their addresses to include in the label run.
4. Click Addn'l Fields to specify a constant to be printed on the labels or you may select field (s) from the iMIS database in addition to the ones listed below. Click OK to accept the additional field.
5. Click OK in the Member/Contact Selections window to accept the information and close the window.
6. Select the location where the export file is to be saved and enter the file name. Click Yes to start the ProSort program.
7. Once the records are selected and exported to the file you selected, the program will attempt to find and start Group 1's Smart Marketing Suite program.

If this is the first time you are using ProSort, the Startup Wizard opens. Click Finish to close the wizard and open the following window.



Group 1's Smart Marketing Suite program

8. When the program starts, select the export file just created and then describe the mailing by creating a ProSort task. To print the labels, run the task. To perform these steps, please refer to the Group 1 ProSort manual.
9. If the installation was successful, the fields in the export file will already be mapped to the appropriate ProSort fields. If the fields are not mapped, use the following information to map the fields correctly:

Field 1:	iMIS control (date, etc.)	Do not map
Field 2:	Member ID	ALT_FIELD1
Field 3:	Full Name	ALT_FIELD2
Field 4:	Company	Company
Field 5:	Address_1	Primary Street
Field 6:	Address_2	Suite/Apt.
Field 7:	City	City
Field 8:	State	State
Field 9:	Zip/Zip+4	Zip/Zip+4
Field 10:	Country Name	Do not map
Field 11:	Country Code	ALT_FIELD3
Field 12:	Delivery Point	Delivery Point
Field 13:	Carrier Route	Carrier Route
Field 14:	Member Code	Subscriber (M if not Comp. Subscription)
Field 15:	Optional Top Line	ALT_FIELD4
Field 16:	First Name	First Name
Field 17:	Last Name	Last Name

Note: Note: Export creates two files: .PRN and .PR^. The .PR^ file contains field mappings. Do not select or delete this file: deleting the file causes the field mappings above to be lost.

Advanced subscriptions

In addition to printing address labels from the iMIS member database as mentioned in the above section, Advanced Subscription customers can print labels and postal reports for publication subscribers and publication back-issue requests. Because Group 1 specializes in monitoring and developing software to meet current postal regulations, the integration of Group 1's software with iMIS will benefit Advanced Subscription clients as

well. The setup and maintenance of publication issues, subscriptions, and back-issue requests remain the same. Instead of iMIS generating the labels, however, the export procedure and interface to ProSort will take place, as described above.

Three report menu items are available:

- Back Issue Labels
- Issue Labels
- Name Labels

QAS Postal Barcoding

The iMIS/QAS Postal Barcoding Module helps organisations ensure accuracy for mailing addresses in Australia, New Zealand, and United Kingdom to obtain the maximum allowable postal discounts.

To achieve this, ASI has partnered with QAS Systems (Pty) Ltd. to integrate QuickAddress Pro v4 and QuickAddress Batch v4 (QAS), which enables international associations to validate addresses against multiple country databases. The combined technology gives the ability to add a postcode, delivery point identifier (DPID) and barcode to accurate addresses in the iMIS database. The addresses can then be printed in the correct format required by Australia Post, complete with barcodes. The user needs to create a Crystal report to include the barcode.

The iMIS/QAS Postal Barcoding Module compares addresses in the iMIS database against the QAS country address databases. If a match is found, the iMIS records will be updated with postcode, delivery point identifier and barcode.

If you are licensed for QuickAddress Pro v4, you can manually verify addresses from within iMIS by clicking Verify Address at various windows that display address information. If you are licensed for QuickAddress Batch v4, you can verify and update addresses in all or part of the iMIS database in a batch mode.

> **Note:** Note: In order to integrate this module with iMIS, you must obtain the appropriate product license keys from your AiSP.

Batch and manual address verification in iMIS

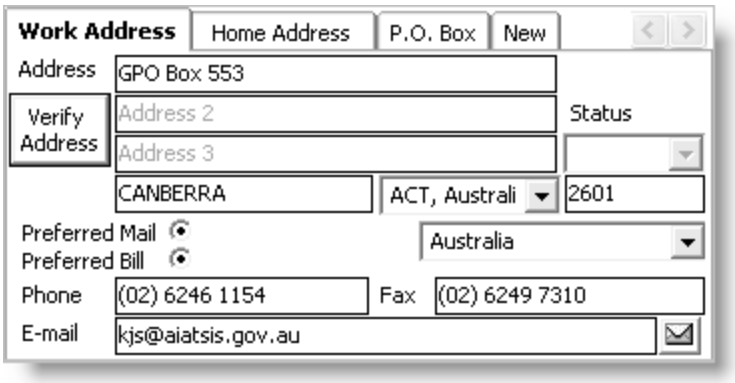
Batch verification

If you are licensed for QAS Batch v4, and have properly implemented the product with iMIS (see "Implementing QAS with iMIS"), a task list item in the Customers module enables you to perform batch verification of iMIS addresses (see "Verifying a batch of addresses with QAS Batch").

Manual verification

If you are licensed for QAS Pro v4, and have properly implemented the product with iMIS (see "Implementing QAS with iMIS"), a Verify Address button is accessible through the following windows:

- Customers > Manage Customers
- Events > Register a customer > select the Attendees tab
- Orders > Enter and edit orders > in the Bill to ID field, click Add
- Orders > Enter and edit order > select the Ship to Info tab
- Exposition > Process booth orders > click Options and choose Address
- Fundraising > Enter and edit gifts > select the Donor tab
- Fundraising > Enter and edit gifts > select the Soft Credit tab and click Add



The Verify Address button

If an address cannot be verified automatically from the address data that has been entered, a new QAS for iMIS window enables you to manually verify an address (see "Manually verifying addresses with QAS").

Manual address verification for QAS requires purchase of a separate license key than that required for QAS batch address verification. There is no dependency between the two licenses. You can have either the batch or on-demand license or both.

Postal Barcoding Terms

The following is a list of terms that are used in this documentation:

4-State Barcode

The barcode format adopted by Australia Post is called the 4-State barcode. The name is derived from the fact that the bars can only be placed in one of four positions: Tracker on its own, Tracker with Ascender, Tracker with Descender, and Tracker with Ascender and Descender.

Address Matching Approval System (AMAS™)

The Address Matching Approval System (AMAS™) has been developed by Australia Post to improve the quality of addressing. AMAS™ is a software approval program that provides a standard by which to test and measure the quality of address matching soft-ware and its ability to append a unique Delivery Point Identifier (DPID) to each address record within a database.

Barcode

A series of bars, which represent letters, numerals, and other human-readable characters which can be deciphered by mail sorting equipment

Barcode Quality Program (BQP)

BQP offers customers the opportunity to check the quality of their barcodes against Post's 4-State barcode acceptance specifications.

Barcode Sorter (BCS)

Mail sorting equipment, which reads a barcode on a piece of mail and sorts the article depending on the information contained within the barcode and a predefined sort plan programmed into the equipment

Country Address Database

QuickAddress Pro v4 and QuickAddress Batch v4 use separate address databases for each supported country. ASI currently supports QAS v4 for use only with v4 country address databases from QAS as they become available for Australia, New Zealand, and United Kingdom.

Delivery Point Identifier (DPID®)

The DPID is an eight-digit number that is appended to all 8.8 million delivery addresses in Australia which uniquely identifies each delivery point to which Australia Post delivers mail.

FuturePOST

FuturePOST is the name of the business unit within Australia Post responsible for implementing the upgrade of the mail-processing network and letter barcoding.

Metering

Metering is one of two lodgment options available to customers. Meters are new generation franking machines.

Manifesting

Manifesting is one of two lodgment options available to customers. A manifest is the supporting documentation that provides dispersions, volumes, and weight per sort plan for PreSort letter lodgments.

Postal Address File (PAF®)

The PAF is a database built and maintained by Australia Post, which contains the 8.8 million deliverable addresses in Australia and their DPIDs. It is privacy-compliant because it does not hold the names of residents but rather, just the delivery address information.

Presorting

The process whereby a customer sorts their mail according to defined sorting breaks prior to lodgment into the Australia Post Network

PreSort Letters Service

A discounted service available to customers who presort their bulk mail lodgements according to Post's PreSort terms and conditions

Benefits of QAS Postal Barcoding Module

Australia Post’s PreSort Letters Service offers reduced prices to businesses that sort their letters into a particular order, place them into appropriately labeled trays, complete documentation and comply with relevant mailing conditions.

A discount applies to all letters that are barcoded and postage-paid by an approved postage meter.

A greater discount is given to those businesses that can print barcodes and sort letters into the Barcode Sort Plan sequence. These fields identify the postal carrier route and the place of delivery along that route. To receive these discounts, 300 or more letters must be mailed at one time.

The iMIS/QAS Postal Barcoding Module will certify addresses and add postcodes, delivery point identifiers and barcodes.

In addition to the ability to AMAS™-certify your iMIS database, the iMIS/QAS Postal Barcoding Module gives you two more features:

- You can verify or match addresses as they are entered into the iMIS database or at any time that there is a change of address.
- You can edit the addresses that do not match, and browse the country address database for the correct address.

The following sections discuss how to install and use the iMIS/QAS Postal Barcoding Module. Refer to QuickAddress Pro v4 and QuickAddress Batch v4 documentation for more information.

> **Note:** Note: Australia Post's rules and regulations are discussed in detail in PreSort Service Guide for Barcoded & Unbarcoded Letters. Contact a postal business centre for complete services.

Implementing QAS with iMIS

It is beyond the scope of iMIS documentation to describe the full installation and configuration process for QAS products. Refer to your QuickAddress Pro v4 and QuickAddress Batch v4 documentation to install, configure, and test the base functionality of these products.

After confirming that QAS is properly functioning in a standalone context, perform the procedures in the following sections to ensure that QAS v4 is properly integrated with iMIS.

Notes

- You must have the correct licence keys to use QAS Pro v4 and QAS Batch v4.
- You must have iMIS version 10.6 or later to use the QAS v4 software.
- ASI supports QAS v4 for use only with v4 country address databases from QAS as they become available for Australia, New Zealand, and United Kingdom.
- iMIS integration with QAS v4 country databases is still limited to the first six main address elements in the database.

Limitations and interaction with AccuMail

iMIS can support only QuickAddress v4 (QAS) or only AccuMail as your address validation system. You cannot use both at the same time, in any combination. If your iMIS licenses contain keys for both QAS and AccuMail components, the QAS keys take precedence and all AccuMail functionality will be suppressed in iMIS.

iMIS 10.6 supports only QuickAddress Pro v4 and QuickAddress Batch v4. If your iMIS system has been integrated with other versions of QAS through a third-party module such as Xtender, these third party modules should continue to function well. The QAS v4 functionality, such as on-demand address verification and the QAS Batch interface, will not be available unless you upgrade to QAS v4.

Installing QAS Pro v4 and QAS Batch v4

It is beyond the scope of iMIS documentation to describe the full installation and configuration process for QuickAddress Pro v4 and QuickAddress Batch v4 products. You should refer to your QuickAddress v4 documentation to install, configure, and test the base functionality of these products.

However, ASI recommends the following general installation order to ensure that both products function correctly with iMIS. See your QuickAddress v4 product documentation for more information.

To install QAS Pro v4 and QAS Batch v4

1. Run the setup.exe program for QAS Pro API.

   Generally, you should accept all default values during setup, except that you must not select the option to install QAS data.

2. Run the setup.exe program for QAS Batch API.

- If you are planning to use QAS Batch to verify US addresses, select the US Component option during setup. If you do not plan to verify US addresses, be sure to clear the US Component option.
- Generally, you should accept all other default values during setup, except that you must not select option to install QAS data.

3. Install QuickAddress Country Data files.

- Run the setup.exe program for each country address database.
- Select Install New Data if this is the first time that you are installing this country's data file. Otherwise, select Update Existing Data if you have previously installed a data file for this country.
- On the Select Programs page, select both QAS Pro & QAS Batch.
- When prompted, enter the appropriate license key(s) provided by QAS.
- Repeat this process for each country database.

Configuring QAS Address and Data Plus formats

The following procedures detail how to configure the Address Format and Data Plus Format in each QAS v4 country address database.

Configuring QAS Pro v4 for Australian addresses

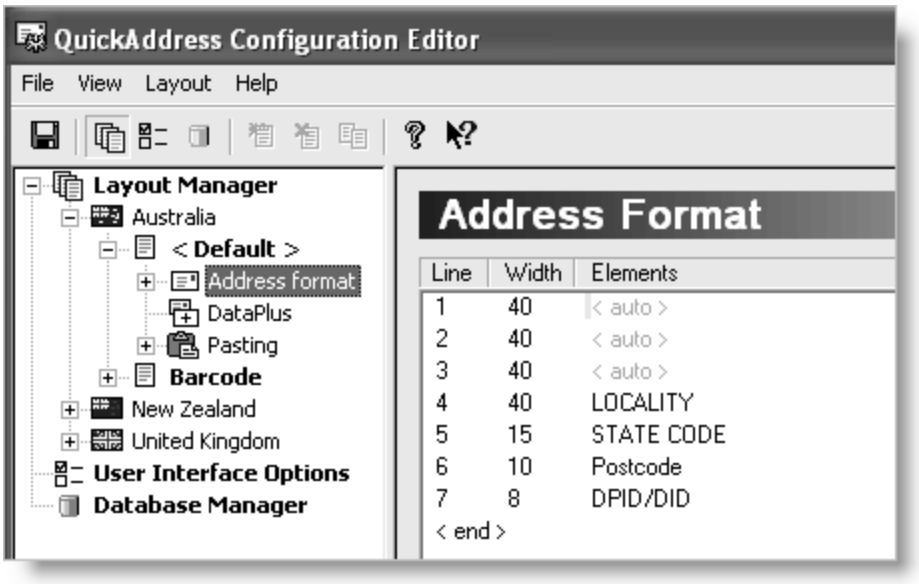
To ensure that QAS can properly verify Australian addresses from iMIS, the Address Format and Data Plus Format in QAS Pro v4 must be configured in the following manner.

Before you begin

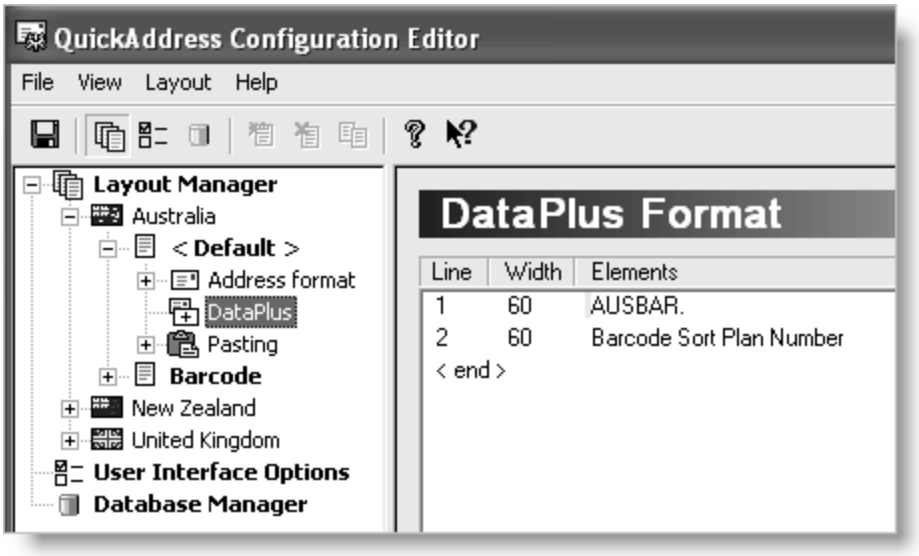
- QAS Pro v4 must be properly installed (see "Installing QAS Pro v4 and QAS Batch v4").
- Ensure that you are generally familiar with the process of using the Layout Manager function to define address layouts. See your QAS Pro v4 documentation for more information.

To configure QAS Pro v4 for Australian addresses

1. Open the QuickAddress Pro Configuration Editor.
2. Use the Layout Manager to define the <Default> address layout for Australia to match these values:



3. Choose File > Save.
4. Use the Layout Manager to define the DataPlus address layout for Australia to match these values.



5. Choose File > Save.

Configuring QAS Pro v4 for New Zealand addresses

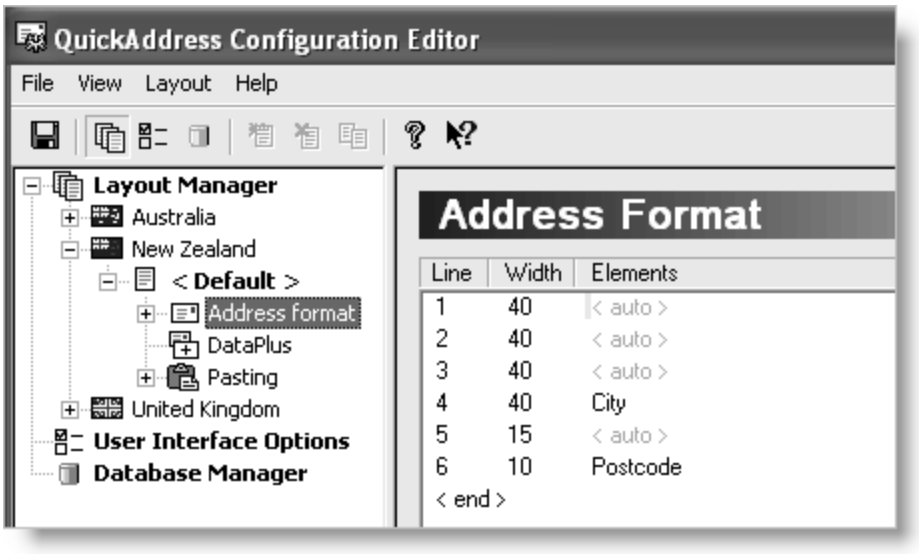
To ensure that QAS can properly verify New Zealand addresses from iMIS, the Address Format and Data Plus Format in QAS Pro v4 must be configured in the following manner.

Before you begin

- QAS Pro v4 must be properly installed (see "Installing QAS Pro v4 and QAS Batch v4").
- Ensure that you are generally familiar with the process of using the Layout Manager function to define address layouts. See your QAS Pro v4 documentation for more information.

To configure QAS Pro v4 for New Zealand addresses

1. Open the QuickAddress Pro Configuration Editor.
2. Use the Layout Manager to define the <Default> address layout for New Zealand to match these values:



3. Choose File > Save.

Configuring QAS Pro v4 for United Kingdom addresses

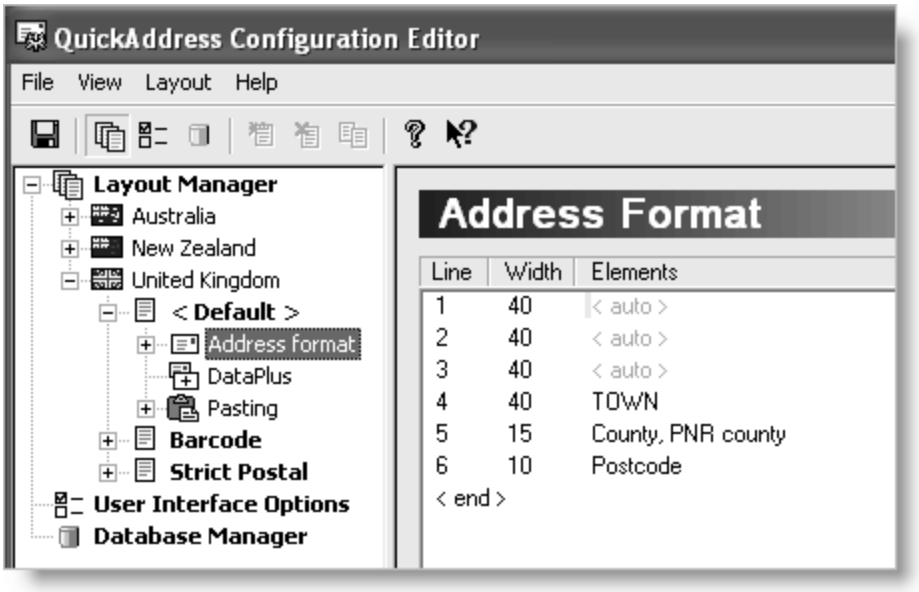
To ensure that QAS can properly verify United Kingdom addresses from iMIS, the Address Format and Data Plus Format in QAS Pro v4 must be configured in the following manner.

Before you begin

- QAS Pro v4 must be properly installed (see "Installing QAS Pro v4 and QAS Batch v4").
- Ensure that you are generally familiar with the process of using the Layout Manager function to define address layouts. See your QAS Pro v4 documentation for more information.

To configure QAS Pro v4 for United Kingdom addresses

1. Open the QuickAddress Pro Configuration Editor.
2. Use the Layout Manager to define the <Default> address layout for United Kingdom to match these values:



3. Expand the Address format node.
4. Select the Auto formatting node.
5. Clear the Organisation checkbox.
6. Choose File > Save.

Configuring QAS Pro v4 for other countries

We have provided specific address layouts for Australia (see "Configuring QAS Pro v4 for Australian addresses"), New Zealand (see "Configuring QAS Pro v4 for New Zealand addresses"), and United Kingdom (see "Configuring QAS Pro v4 for United Kingdom addresses"), all of which have been tested with iMIS 10.6. Examining the differences between these three address layouts can help you determine a good approach to designing address layouts for other countries in a manner that will be compatible with iMIS country address data.

> **Note:** Note: ASI supports QAS v4 for use only with v4 country address databases from QAS as they become available for Australia, New Zealand, and United Kingdom.

Before you begin

- QAS Pro v4 must be properly installed (see "Installing QAS Pro v4 and QAS Batch v4").
- Ensure that you are generally familiar with the process of using the Layout Manager function to define address layouts. See your QAS Pro v4 documentation for more information.

To configure QAS Pro v4 for other countries

1. Open the QuickAddress Pro Configuration Editor.
2. Use the Layout Manager to define a <Default> address layout for your country, using the following guidelines:

- The first three lines should have a width of 40 and use the <auto> element. These correspond to the three Address fields in iMIS.
- The fourth line should have a width of 40 and use a fixed element that corresponds to the City field in iMIS.
- The fifth line should have a width of 15 and use a fixed element that corresponds to the County field in iMIS.
- The sixth line should have a width of 10 and use a fixed element that corresponds to the Post Code field in iMIS.
- Any additional lines after the sixth line are used only by QAS and will have no impact on address verification in iMIS.

3. Choose File > Save.
4. Test your address layout in iMIS by manually verifying some sample addresses, and also print some reports and labels from iMIS that include some sample addresses.

5. If the addresses do not verify properly, or if anything looks incorrectly formatted in reports and labels from iMIS, change the address layout in QAS Pro and then repeat the testing process until everything works properly in iMIS.

Configuring the QAWORLD.INI file for QAS Batch

You must manually edit various sections in the QAWORLD.INI file for QAS Batch v4 to ensure that QAS Batch functions correctly when used with iMIS.

To define country address layouts if you have a QuickAddress Pro license

QAS Batch does not have a visual interface for defining country address layouts. The easiest way to ensure that QAS Batch has the correct country address layouts to work properly with iMIS is to use the following procedure, which assumes that you also have a QuickAddress Pro license. If you do not have a QuickAddress Pro license, you should adapt this procedure as necessary to manually configure your QAWORLD.INI file.

1. Use the QuickAddress Pro Configuration Editor to define the country address layout for each country address database, as described in the following sections:

- Configuring QAS Pro v4 for Australian addresses
- Configuring QAS Pro v4 for New Zealand addresses
- Configuring QAS Pro v4 for United Kingdom addresses
- Configuring QAS Pro v4 for other countries

2. Open the QAWSERVE.INI file that is located in your QuickAddress Pro API folder.
3. For each country address layout that you have defined, locate the corresponding AddressLineCount, DataplusLines, and AddressLinen settings and copy them to the Windows clipboard.

   For example, if your address layout for New Zealand has six lines, you would copy the following settings from the QAWSERVE.INI file:

   NZLAddressLineCount=6

   NZLDataplusLines=0

NZLAddressLine1=W40

NZLAddressLine2=W40

NZLAddressLine3=W40

NZLAddressLine4=W40,L21

NZLAddressLine5=W15

NZLAddressLine6=W10,C11

4. Paste the copied settings into the appropriate section of the QAWORLD.INI file that is located in your QuickAddress Batch API folder.

   In most cases, you will be replacing existing settings that have different values, so you must carefully examine the contents of your QAWORLD.INI file and ensure that you have completely replaced the appropriate settings with the values copied from the QAWSERVE.INI file from QuickAddress Pro.

5. Delete the three-letter country prefix located at the beginning of each line that you pasted into the QAWORLD.INI file.

   For example, if you pasted the lines corresponding to the address layout for New Zealand, you would edit the pasted lines to look like the following:

   AddressLineCount=6

   DataplusLines=0

   AddressLine1=W40

   AddressLine2=W40

   AddressLine3=W40

   AddressLine4=W40,L21

   AddressLine5=W15

   AddressLine6=W10,C11

   To ensure proper behavior when multiple country address databases are used with iMIS

Each country section of the QAWORLD.INI file in the QAS Batch API folder must have a CountryBase setting that first specifies the current country section label, followed by the labels of all other country sections in the file.

For example, if you have three country databases, Australia, United Kingdom, and New Zealand, their respective CountryBase settings must have the following content:

[AUS]
CountryBase=AUS GBR NZL
...rest of the settings for AUS

[GBR]
CountryBase=GBR AUS NZL
...rest of the settings for GBR

[NZL]
CountryBase=NZL AUS GBR
...rest of the settings for NZL

If your CountryBase settings are not formatted in this manner, then iMIS will verify a batch of addresses only against the default country database that is specified in the Customer Setup - QAS Options dialog.

Note: Note: If the United Kingdom (GBR) is one of your multiple country databases, you might encounter errors with the State code of your non-UK addresses being changed from an abbreviated format to a fully-spelled-out format if you select GBR as your default country database for the batch run. This happens because QAS Batch v4 applies the address formatting for the default country to all addresses processed in the batch, regardless of the individual CountryBase settings for each country. To prevent this problem from affecting your iMIS addresses, you can (a) select a country other than GBR as the default country database before

> running a QAS Batch job, or (b) edit the [GBR] section of your QAWORLD.INI file to remove the PNR County value (L12) from the format for AddressLine5, like this: AddressLine5=W15,L11.

To prevent API calls not being directed to the correct system path

API calls from iMIS to QAS Batch can sometimes fail, due to a known inconsistency with QAS Batch. Adding a homedir setting to your QAWORLD.INI file for QAS Batch prevents this problem from occurring.

1. Open the QAWORLD.INI file that is located in your QuickAddress Batch API folder.
2. In the [QADEFAULT] section of the file, add a homedir setting that specifies the full path to your QuickAddress Batch API folder.

   The path that you specify can be formatted as a local file path on the iMIS client's computer (for example, C:\Program Files\QAS\QuickAddress Pro API), or it can be formatted as a UNC to a network computer (for example, \\atcserv\C\Program Files\QAS\QuickAddress Batch API).

   For example, if your QuickAddress Batch API folder is located in C:\Program Files\QAS, you would use the following homedir setting:

   [QADefault]

   homedir=C:\Program Files\QAS\QuickAddress Batch API
   ...rest of the settings for QADefault

Specifying QAS API install paths

Your QuickAddress Pro API folder and QuickAddress Batch API folder must be listed in the system PATH variable in Windows for each iMIS client in your organization. Because these folders might not be local to each iMIS user's client computer, iMIS provides an interface that enables you to specify the location of these folders. iMIS then adds these locations to the system PATH variable for the local computer.

Windows and dialogs used in this procedure

- QAS Install Paths window

Before you begin

- QAS v4 must be properly installed (see "Installing QAS Pro v4 and QAS Batch v4").

To specify QAS API install paths

1. In iMIS, choose File > System Setup.

   The System Setup window appears.

2. Click QAS Install Paths.

   The QAS Install Paths window appears.

3. Click Edit to put the window in edit mode.

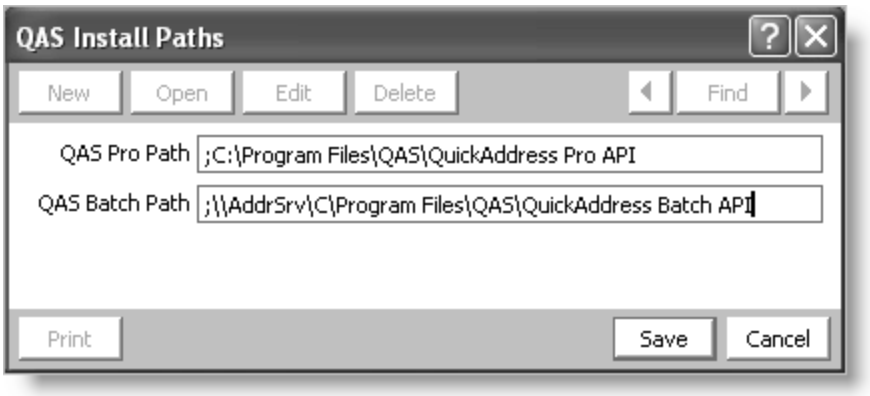
4. In the QAS Pro Path field, enter a semi-colon followed by the full file path or Universal Naming Convention (UNC) path to your QuickAddress Pro API folder (for example, ;C:\Program Files\QAS\QuickAddress Pro API).

5. In the QAS Batch Path field, enter a semi-colon followed by the full file path or UNC path to your QuickAddress Batch API folder (for example, ;\\atcserv\C\Program Files\QAS\QuickAddress Batch API).

6. Click Save.

QAS Install Paths window

This window specifies the location of the API folders for QAS Pro v4 and QAS Batch v4. When this information is saved, these paths are written to the system PATH variable of the local computer.



From iMIS, choose File > System Setup, and click QAS Install Paths

QAS Pro Path

Specifies the path to the QuickAddress Pro API folder. The path that you specify can be formatted as a local file path on the iMIS client's computer (for example, ;C:\Program Files\QAS\QuickAddress Pro API), or it can be formatted as a Universal Naming Convention (UNC) path to a network computer (for example, ;\\atcserv\C\Program Files\QAS\QuickAddress Pro API).

Note: Note: You must prefix the file path with a semicolon to ensure that the file path is properly delimited when it is appended to the system PATH variable in Windows.

QAS Batch Path

Specifies the path to the QuickAddress Batch API folder. The path that you specify can be formatted as a local file path on the iMIS client's computer (for example, ;C:\Program Files\QAS\QuickAddress Batch API), or it can be formatted as a UNC path to a network computer (for example, ;\\atcserv\C\Program Files\QAS\QuickAddress Batch API).

Note: Note: You must prefix the file path with a semicolon to ensure that the file path is properly delimited when it is appended to the system PATH variable in Windows.

Specifying the default country database for QAS

Because QAS supports address checking from multiple country address databases, you must specify which address database to use as the default for iMIS.

To specify the default country database for QAS

1. From Customers, select Set up module > General.

   The Set up general options window appears.

2. Click Address and Notes.

   The Customer Setup - Address and Notes window appears.

3. Click QAS Options.

   The Customer Setup - QAS Options window appears.

4. Press Ctrl+E to put the window in edit mode.

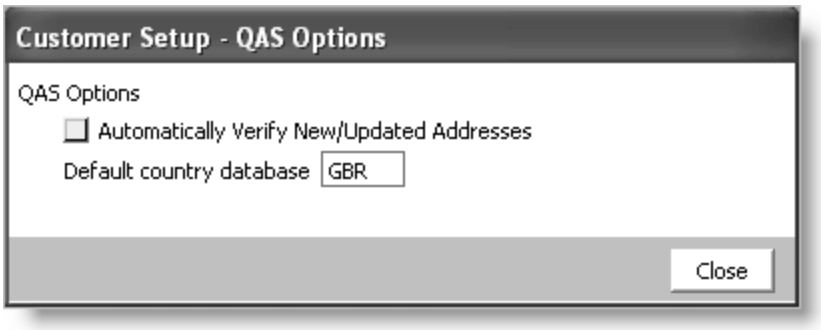
5. In the Default country database field, enter a three-character QAS country code (for example, AUS, GBR, NZL, and so on).

6. Click Close.

7. In the Customer Setup - Address and Notes window, click Save.

Customer Setup - QAS Options window

This window specifies options for QAS Pro and QAS Batch.



From Customers, select Set up module > General, click Address and Notes, and click QAS Options

Automatically Verify New/Updated Addresses

Automatically verifies an address when the address record is being saved. When cleared, no automatic verification takes place when the address record is being saved. The address is verified against the country address database that corresponds to the specified country in the address record. If no country is specified in the address record, the address is verified against the Default country database.

If auto-verification is enabled, this behavior can be overridden in the Customer Management module on a per-address basis by selecting the No auto-verify checkbox in the QAS for iMIS window, which flags a specific address to skip automatic address verification until one of the five address fields is changed. See QAS for iMIS window for more information.

Default country database

Specifies which country database to use as the default for both manual address verification and batch verification. This default value is required for QAS to work properly. The value you enter must be a three-character QAS country code (for example, AUS, GBR, NZL, and so on). See your QuickAddress Country Guide to determine the appropriate country code.

This default address database affects the behavior of both manual and batch address verification.

- When manually verifying addresses with QAS, each address is first checked against this default address database. You can, however, select a different address database as needed during the process.
- When verifying a batch of addresses with QAS Batch, all addresses in the batch are checked against this default address database. If you have enabled user interaction during the batch job, you can select a different address database as needed during the process.

Enabling or disabling address auto-verification for QAS

You can configure iMIS to automatically verify each address against your QAS address databases when you save the address record.

To enable or disable address auto-verification for QAS

1. From Customers, select Set up module > General.

   The Set up general options window appears.

2. Click Address and Notes.

   The Customer Setup - Address and Notes window appears.

3. Click QAS Options.

   The Customer Setup - QAS Options window appears.

4. Press Ctrl+E to put the window in edit mode.

5. Select the Automatically Verify New/Updated Addresses checkbox to enable automatic verification of addresses, or clear the checkbox to disable auto-verification.

6. Click Close.

7. In the Customer Setup - Address and Notes window, click Save.

Verifying a batch of addresses with QAS Batch

You can batch verify addresses with QAS Batch.

Before you begin

- QAS Batch v4 must be installed and properly configured (see "Implementing QAS with iMIS") for integration with iMIS.
- The file path to your QAS Batch API folder must be specified in iMIS (see "Specifying QAS API install paths").
- The default country address database must be specified in iMIS (see "Specifying the default country database for QAS").

To verify a batch of addresses with QAS Batch

1. From Customers, select Manage QAS > QuickAddress Batch.

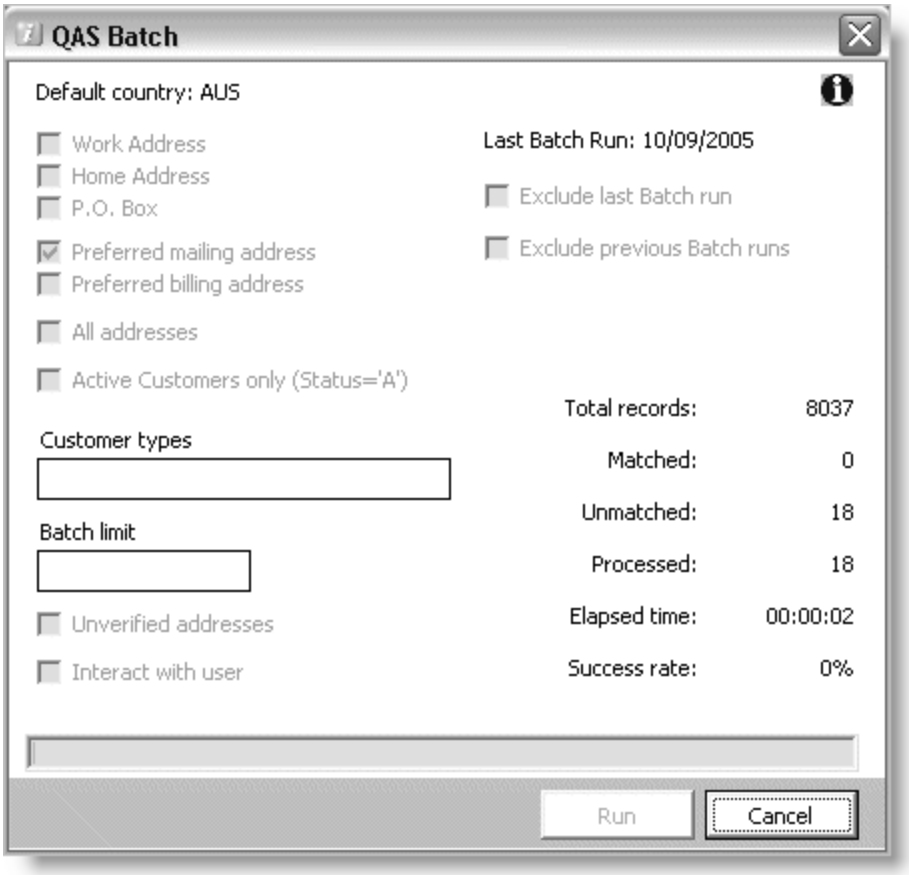
   The QAS Batch window appears.

2. Specify the batch options.
3. Click Run.

QAS Batch window

This window provides a convenient interface to QAS Batch v4, enabling you to batch verify all addresses in iMIS. The various options can be used in combination to provide great flexibility. For example, you can process a very large iMIS database in three smaller batch runs, and then make a fourth batch run to manually verify the remaining addresses that could not be automatically verified in the first three batch runs.

> **Note:** Note: iMIS always runs QAS Batch with a high required match success level (Q or R) and a high required match confidence level (9).



From Customers, select Manage QAS > QuickAddress Batch

> **Note:** Note: The Work Address, Home Address, and P.O. Box checkboxes might have different labels if your iMIS administrator has changed the corresponding address tab names in the Customer Management module.

Default Country

(read-only) Specifies the current default country database (which is set in the Customer Setup - QAS Options window window). Addresses in the batch that do not have a specified country are checked against the default country database. Addresses that have a specified country are instead checked against the corresponding QAS country address database, if installed, or they are ignored if there is no corresponding QAS country database.

Work Address

Includes all work addresses (mailing addresses) in the batch run. When cleared, work addresses are ignored.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and you select this checkbox, only home and work addresses are processed in this batch run.

Home Address

Includes all home addresses (residential addresses) in the batch run. When cleared, home addresses are ignored.

This filter is additive with all other filters. For example, if you select the Work Address checkbox and you select this checkbox, only home and work addresses are processed in this batch run.

P.O. Box

Includes all P.O. box addresses (delivery addresses) in the batch run. When cleared, P.O. box addresses are ignored.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and you select this checkbox, only home and P.O. Box addresses are processed in this batch run.

Preferred mailing address

Includes all preferred mailing addresses in the batch run. When cleared, preferred mailing addresses are ignored.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and you select this checkbox, only home and preferred mailing addresses are processed in this batch run.

Preferred billing address

Includes all preferred billing addresses in the batch run. When cleared, preferred billing addresses are ignored.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and you select this checkbox, only home and preferred billing addresses are processed in this batch run.

All addresses

Includes all addresses in the iMIS database in the batch run, and clears all of the preceding checkboxes. When cleared, the preceding checkboxes can be selected.

Active Customers only (Status='A')

Limits processing of the selected address types to only customers who have a Status of A (active). When cleared, all of the selected address types are processed, regardless of the customer's status.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and you select this checkbox, only the home address of customers with a Status of A are processed in this batch run.

Last Batch Run

(read-only) Specifies the date of the last batch run.

Exclude last Batch run

Excludes all records that were processed in the immediately previous batch run. When cleared, the records processed in the previous batch run are included in this batch run.

> **Note:** Note: If the Exclude previous Batch runs option is selected, this checkbox is ignored.

Exclude previous Batch runs

Excludes all records that were processed in the two immediately previous batch runs. When cleared, the records processed in the two previous batch runs are included in this batch run.

You can use this checkbox and the Exclude last Batch run checkbox in combination with the Batch limit field to process a large iMIS database in three separate runs, using the following method:

1. In the Batch limit field, enter a value that is one-third the amount of address records in your iMIS database.
2. Clear both the Exclude last Batch run and Exclude previous Batch runs checkboxes and run the batch to process one-third of your address records.
3. Select the Exclude last Batch run checkbox and run the batch again to process the second third of your address records.
4. Select the Exclude previous Batch runs checkbox and run the batch again to process the remaining third of your address records.

Customer types

Limits processing to the specified comma-delimited list of customer Member Types. Only addresses for customers with this member type are processed in the batch run.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and you enter M,CM in this field, only the home address of customers with a Member Type of M or CM are processed in this batch run.

Batch limit

Specifies the maximum number of address records to include in the batch run. You can use this field in combination with the Exclude last Batch run checkbox to verify a large iMIS database in two separate batch runs, or you can use this field in combination with both the Exclude last Batch run and Exclude previous Batch runs to verify a large iMIS database in three separate batch runs.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and the Active Customers only checkbox, and you specify 1000 in this field, only the first 1000 home addresses of customers with a Status of A are processed in this batch run.

Unverified address

Limits processing to the addresses that have never been fully verified, either by manual verification with QAS Pro or by batch verification with QAS Batch. A fully verified address is one for which QAS has found a match, returned a full address for the match, and the match has been accepted. A skipped or cancelled verification attempt does not flag an address as being fully verified.

This filter is additive with all other filters. For example, if you select the Home Address checkbox and this checkbox, only home addresses that have not been fully verified are processed in this batch run.

This filter is generally best used in combination with the Interact with user checkbox, because unverified address are likely to need manual verification through the QAS Pro interface.

Selecting this checkbox clears the Exclude last Batch run and Exclude previous Batch runs checkboxes.

Interact with user

(available only if licensed for QAS Pro) Displays the QAS Batch Interaction window for each address in the batch that does not meet the Required match success level and

Required confidence level, enabling you to manually verify the address. See QAS Batch Interaction window for more information.

Batch run statistics area

Displays the following statistics about the results of the batch run:

- Total records - specifies the number of iMIS address records searched
- Matched - specifies how many of the Processed records met the required high match success level and confidence level (Q9 or R9)
- Unmatched - specifies how many of the Processed records did not meet the required match success and confidence levels
- Processed - specifies how many of the Total records were in the country specified as the Default Country for the batch run
- Elapsed Time - specifies how long the batch run took to complete
- Success Rate - specifies the percentage of Matched records found in the total number of Processed records

Run

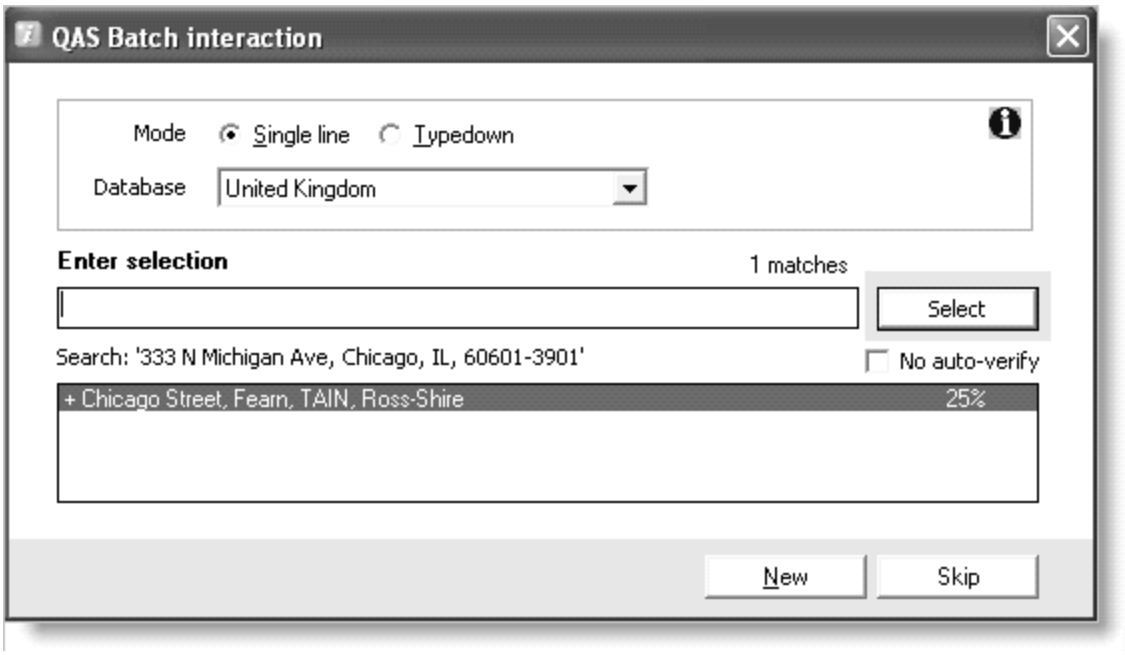
Runs the batch job.

Cancel

Cancels the batch job. This can be done safely at any time because it takes effect only after the current address has fully completed processing.

QAS Batch Interaction window

This window appears when verifying a batch of addresses with QAS Batch if you have selected the Interact with user checkbox on the QAS Batch window.



This window appears automatically during batch address verification if the Interact with user checkbox is selected

The contents of this window are identical to the QAS for iMIS window used for manual address verification. See QAS for iMIS window for more information.

Manually verifying addresses with QAS

In all iMIS modules where address verification is available, you can use the Verify Address button to manually verify an address. You can always manually verify an address even if auto-verification of addresses is enabled.

Before you begin

- QAS Batch v4 must be installed and properly configured (see "Implementing QAS with iMIS") for integration with iMIS.
- The file path to your QAS Batch API folder must be specified in iMIS (see "Specifying QAS API install paths").
- The default country address database must be specified in iMIS (see "Specifying the default country database for QAS").

To manually verify an address with QAS

1. From the iMIS module that displays an address, click Verify Address.

   The QAS for iMIS window appears. The Database field displays the country specified in the address from the iMIS module, provided that you have that country address database installed in your implementation of QAS. Otherwise, the Database field displays the Default country database specified in the iMIS Customer Setup window. The Enter [address type] field is blank, and the search status line displays the address from the iMIS module for which QAS is searching for potential matches.

   After QAS has finished searching for potential matches to the selected address, the status line displays how many matches were found, and the matches are listed in the results area.

2. Does the results area list a correct match for the selected address from the iMIS module?

- If the results area lists a correct match, double-click the match.

  The results area displays the full address details for the selected match, and Accept and Cancel buttons appear below the results area.

- If the results area does not list any correct matches, or if the area is empty and the search status line displays 0 matches found, perform a type-down search to manually search for a correct match.

- In the QAS for iMIS window, click New. The results area and the Enter [address type] field is cleared.

- From the Mode options, select Typedown.

- From the Database drop-down list, select the country in which you want to search for a matching address.

- In the Enter [address type] field, begin entering either the postcode or the place name in which you think the address might be located. After you've entered enough characters for QAS to narrow down the list of matching postcodes or places, the potential matches are listed in the results area.

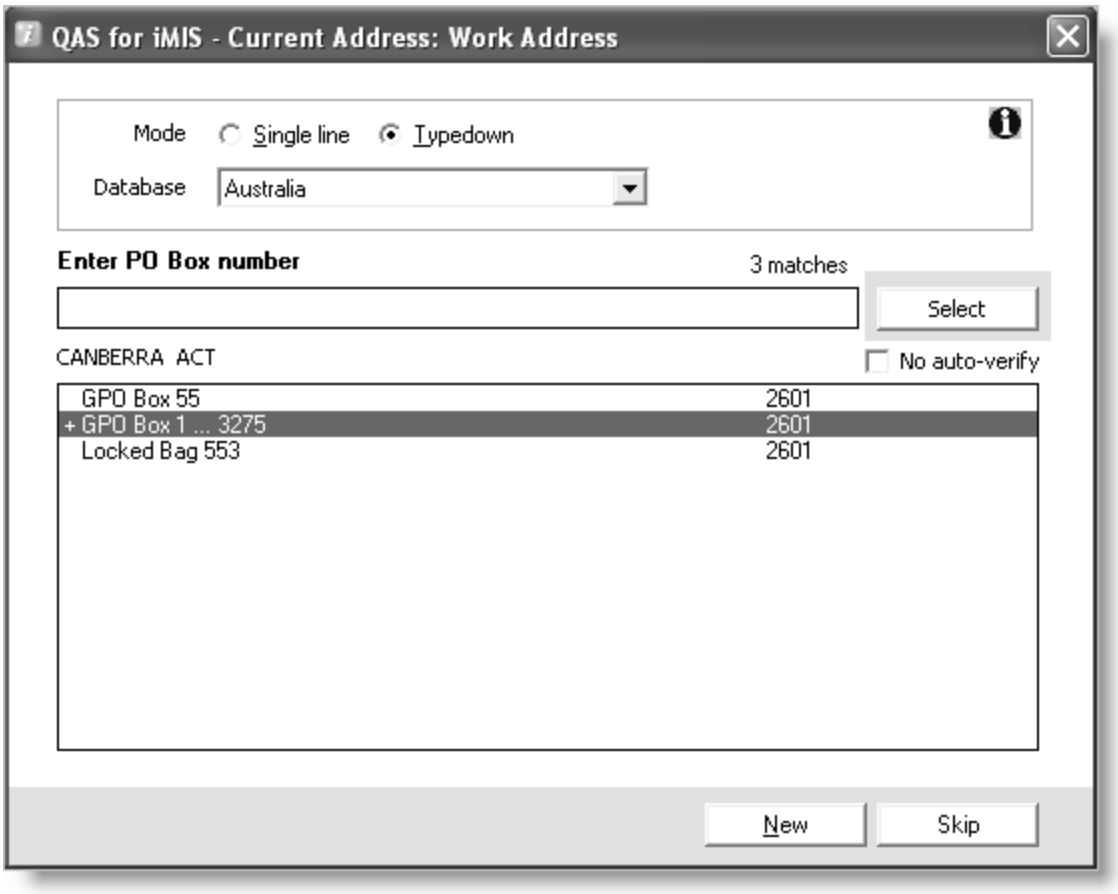
- From the list in the results area, double-click the most likely potential match.

- The search status line displays the selected postcode or place name, and the Enter [address type] field is cleared.
- In the Enter [address type] field, begin entering the street name, organization name, or P.O. box number. After you've entered enough characters for QAS to narrow down the list of matching streets, organization names, or P.O. boxes, the potential matches are listed in the results area.
- If the results area lists a correct match, double-click the match. The results area displays the full address details for the selected match, and Accept and Cancel buttons appear below the results area.

3. Click Accept to confirm the address displayed in the results area and update the current address in the iMIS module accordingly.
4. If you are working in the Manage Customers window of iMIS, repeat this process for each of the three customer addresses.

QAS for iMIS window

The QAS for iMIS window enables you to manually verify an address against a QAS country address database. This window appears only when the address cannot be automatically identified with a single match when you click the Verify Address button.



From any module that displays an address, click Verify Address

Mode

Specifies the search mode for address matching.

- Single line - Specifies that no search attempt is made until you enter a full or partial address in the Enter selection field and then click Select.
- Typedown - Specifies that a search attempt is made with every character that you enter in the Enter selection field. As you enter each character, the number of matches displayed in the search status line becomes increasingly smaller. When the number of potential matches becomes small enough, a list of the potential matches is displayed in the results area.

Database

Specifies the country address database in which to search for matching addresses.

Enter [address type]

Specifies the full or partial address for which QAS should search. The [address type] changes dynamically to indicate the type of address currently being searched. If the Mode is set to Single line, you must click Select to perform the search. If the Mode is set to Typedown, QAS performs a running search with each character that you enter in this field.

Select

Searches the specified Database for matches to the full or partial address specified in the Enter [address type] field.

Search status line

(read-only) Displays the number of matches found for the full or partial address specified in the Enter [address type] field.

No auto-verify

(Customer Management module only) Flags the full or partial address specified in the Enter [address type] field to be excluded from future address verification, which prevents iMIS from continually prompting you to manually verify the address when it fails automatic verification every time you work with the flagged address in the Manage customers window. This feature is useful when one of the alternate addresses for a customer are located in a country for which you do not have a QAS country address database, or for when you must store an unusual address or an address that is not yet in any of your QAS country address databases.

The flagged address will not be verified even when you subsequently click the Verify Address button. However, the flagged address will be verified if you change any information in the 6 fields associated with the flagged address.

Results area

Performs two different functions depending on whether you are searching for matching addresses or confirming a matched address.

- Searching for addresses - Lists all addresses that match the full or partial address specified in the Enter [address type] field. When performing a search in Typedown mode, some potential matches will be prefixed with a plus sign (+), which indicates that you can double-click that potential match to further refine your search.

  For example, if you have entered Westmi in the Enter [address type] field, this area lists potential matches that include values such as: + Westmill, + West Milton, + Westminster, and so on. The plus sign prefix indicates that there are more potential matches under each of those place names. To refine your typedown search to include only addresses in Westminster, you would double-click the + Westminster item in the list.

- Confirming an address - Lists the full address details of a selected address so that you can confirm the match. The buttons below this area change to Accept and Cancel. Clicking Accept confirms the match. Clicking Cancel rejects the match and redisplays the list of potential matches.

  New

  Clears the results area and the Enter [address type] field, enabling you to start a new search.

  Skip

  Cancels verification of the current address in the iMIS module.

  Accept

  Confirms the address displayed in the results area and updates the current address in the iMIS module accordingly.

  Cancel

  Rejects the address displayed in the results area and redisplays the list of potential matches.

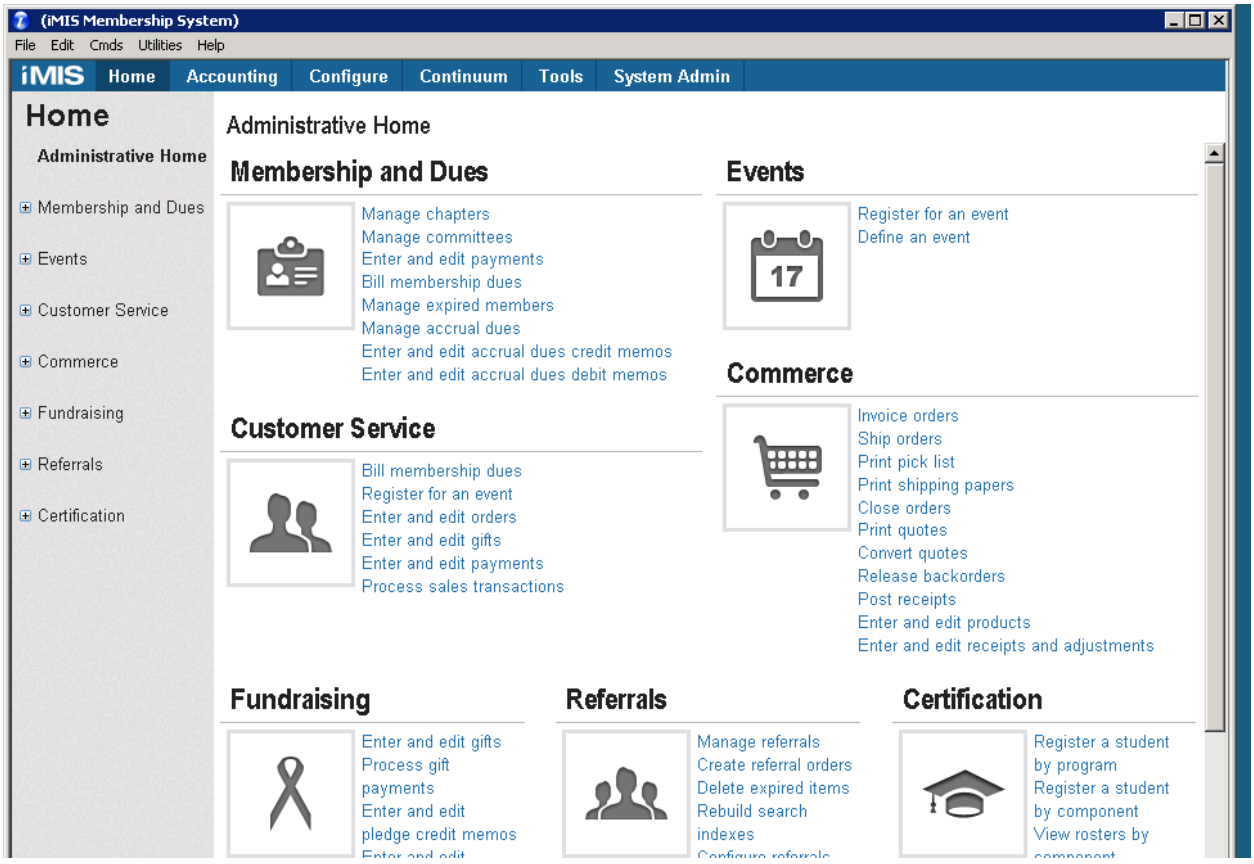
Admin - Desktop

An alternative to the traditional iMIS Desktop is now available in a new streamlined, easy-to-use interface: Administrative Console. iMIS Desktop continues to allow an administrator to define and setup iMIS. However, as iMIS functionality is accessible from the web, many setup options can be administered from the web.

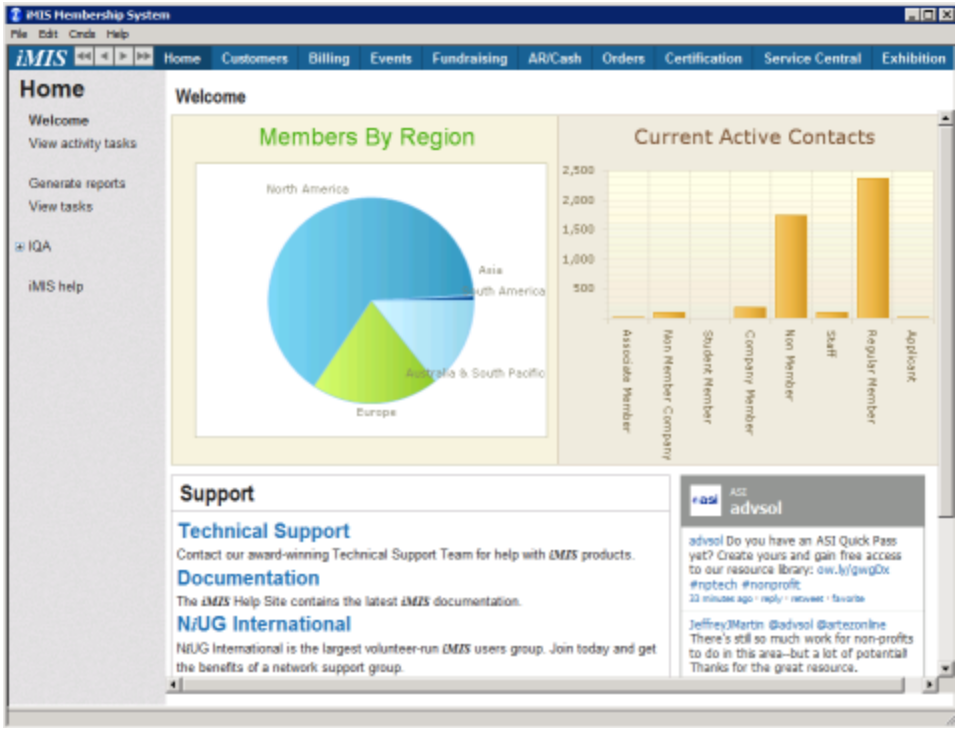
For iMIS users upgrading from 15.2, Administrative Console includes numerous areas through which you can set up and administer your iMIS system – but you may need to continue using iMIS Desktop to access certain features.

Note: To switch from Administrative Console back to Desktop, change the URL specified in Logon > Set Host Location so that it ends with /CS rather than /CS2.

iMIS Administrative Console



iMIS Desktop



If you are familiar with the traditional Desktop, the following table should help you locate the same functionality in the new Administrative Console.

Administrative Console	Note for upgrading customers: if not literal, all terms and verbiage are relative to traditional Desktop.
Home (Administrative Home)	
Administrative Home: quick access to left navigation items	

Membership and Dues	Manage chapters
	Manage committees
	Enter and edit payments
	Bill membership dues
	Manage expired members
	Manage accrual dues
	Enter and edit accrual dues credit memos
	Enter and edit accrual dues debit memos
Events	Register for an event
	Define an event
Customer Service	Process customer requests
	Bill membership dues
	Register for an event
	Enter and edit orders
	Enter and edit gifts
	Enter and edit payments
	Process sales transactions

Commerce	Invoice orders
	Ship orders
	Print pick list
	Print shipping papers
	Close orders
	Print quotes
	Convert quotes
	Release backorders
	Post receipts
	Enter and edit products
	Enter and edit receipts and adjustments
Fundraising	Enter and edit gifts
	Process gift payments
	Enter and edit pledge credit memos
	Enter and edit pledge debt memos
	Manage requests
	Enter and edit appeal expenses
	Process premiums
Referrals	Manage referrals
	Create referral orders
	Delete expired items
	Rebuild search indexes
	Configure referrals options

Certification	Register a student by program
	Register a student by component
	View rosters by component
	Purge registration
	Delete canceled programs
	Delete closed programs
	Set up programs
	Set up components

Accounting

Accounting > Accounting Console

Transactions	Enter and edit cash receipts
	Import transactions
	Enter and edit sales transactions
	Search credit card info
Processes	Manage batches
	Process month-end procedures
	Print transaction journal

Adjustments	Enter and edit credit memos
	Enter and edit debit memos
	Enter and edit pledge credit memos
	Enter and edit pledge debit memos
	Enter and edit accrual dues credit memos
	Enter and edit accrual dues debit memos
Options	Configure accounting options
	Set up products
	Set up terms
	Set up tax codes
	Set up cash accounts
	Set up due to/due from

Configure > Configuration Console

Membership	Configure membership options
	Set up customer types
	Set up activity types
	Update area codes
	Set up country names
	Set up country address layouts
	Set up state/province codes
	Set up lookup/validation tables
	Set up characters
	Set up committee codes
	Set up committee positions
	Set up relationship types
Events	Configure event options
	Set up registrant classes
	Set up event resources
Fundraising	Configure fundraising options
	Set up sender codes
	Set up interest codes
	Set up memorial tribute codes
	Set up tables

Commerce	Configure commerce options
	Set up warehouses
	Set up order types
	Set up product categories
	Set up tax codes
	Set up freight by weight
	Set up freight by total value
	Set up freight by total quantity
	Set up shipping zones
Certification	Configure certification options
	Set up programs
	Set up components
	Set up component categories
	Set up subcomponents
Billing	Configure billing options
	Set up billing cycles
	Set up billing products

Continuum > Continuum Console

Membership Reports	Contact reports
	Billing reports
	Certification reports
	Referral reports
Events and Orders Reports	Events report
	Order processing reports
Fundraising Reports	Fundraising reports
	Executive reports
Commerce and Customer Service Reports	Accounting reports
	Credit card reports
	Customer service reports

Tools > Tools Console

Intelligent Query Architect	Intelligent query architect
Business Object Designer	Business Object Designer
Reports	Reports

System Admin > System Admin Console

iMIS Management	System Summary
	Set up printers
	Manage security-users
	Manage security-role
Workflow	Monitor workflow
	Work item console
	Monitor processes
	View tasks
Utilities	Document system
	User defined tables
	Update iMIS
	Package installer
	Import activities

iMIS

Administering iMIS

Managing your website

iMIS provides the default structure and look for a website and gives you powerful tools to tailor it for your organization's needs. With iMIS Site Designer and Content Manager, you can

- Manage all constituent data and web content based on demographic, transaction, and other data
- Tag, categorize, and deliver content to members and donors
- Mix and match iMIS data, web widgets, and social media tools to create a highly personalized online experience for all users
- Implement self-service functionality to empower constituents to take action on their own, such as pay dues, give donations, participate in peer-to-peer private online communities, and manage their personal profiles online.
- Personalize commerce features like your online store or event calendar to make them relevant for each constituent
- Establish forums, groups, and libraries for organization-constituent communication

As your constituents enjoy the self-service and personalized features, they become more engaged with your organization, providing feedback in online communities and helping you determine what they need for conferences, meetings, education, and other information resources.

In addition, your staff and volunteers are freed from much of the data input tasks so they can focus on meeting your organization's core goals.

These tools can also help you ensure that financial transactions and data updates are easy and smooth for all users and staff, leading to improved accuracy and more valuable information that can be used for future planning.

Getting started with website management

iMIS website management tools give you the power to configure and maintain the appearance, navigation structure, and content authoring environment for you website. Use these tools to:

- Modify default website infrastructure
- Define the navigation structure and appearance
- Define the web content authoring environment
- Perform website maintenance

Modifying default infrastructure

Viewstate information storage

Web page viewstate information can be stored on the server or on the client.

To determine whether viewstate information is stored on the server, navigate to the directory c:\Program Files (x86)\ASI\iMIS\Net\App_Browsers. If the AsiPageAdapter.browser file is in the folder, the information is stored on the server. If it is not in the folder, you can locate the file on the client and move it to this folder.

To turn off server-side storage of viewstate information, rename the .browser file so that it does not end in ".browser" (for example, AsiPageAdapter.unused) and reset IIS.

Setting up automatic email notifications

To specify that email notifications be sent when an order is placed or other triggers:

- Select Tools > Site designer > Manage websites > iMIS Web View.
- Set the view as follows: http://[external_ip_address]/imis/

Modifying navigation and appearance

Default navigation

iMIS supplies a common navigation hierarchy by default.

The application root directory contains an XML file named Web.sitemap. This file organizes the pages in the site hierarchically and is a useful tool to view site navigation.

The URL path mapping for navigation items is relative to the IIS web site root to which this sitemap's website is mapped (Manage websites > Properties). Several WCM websites can be mapped to the same IIS web site root, and some of the properties that you define in this window need to be unique across all sitemaps that ultimately map to the same IIS web site root.

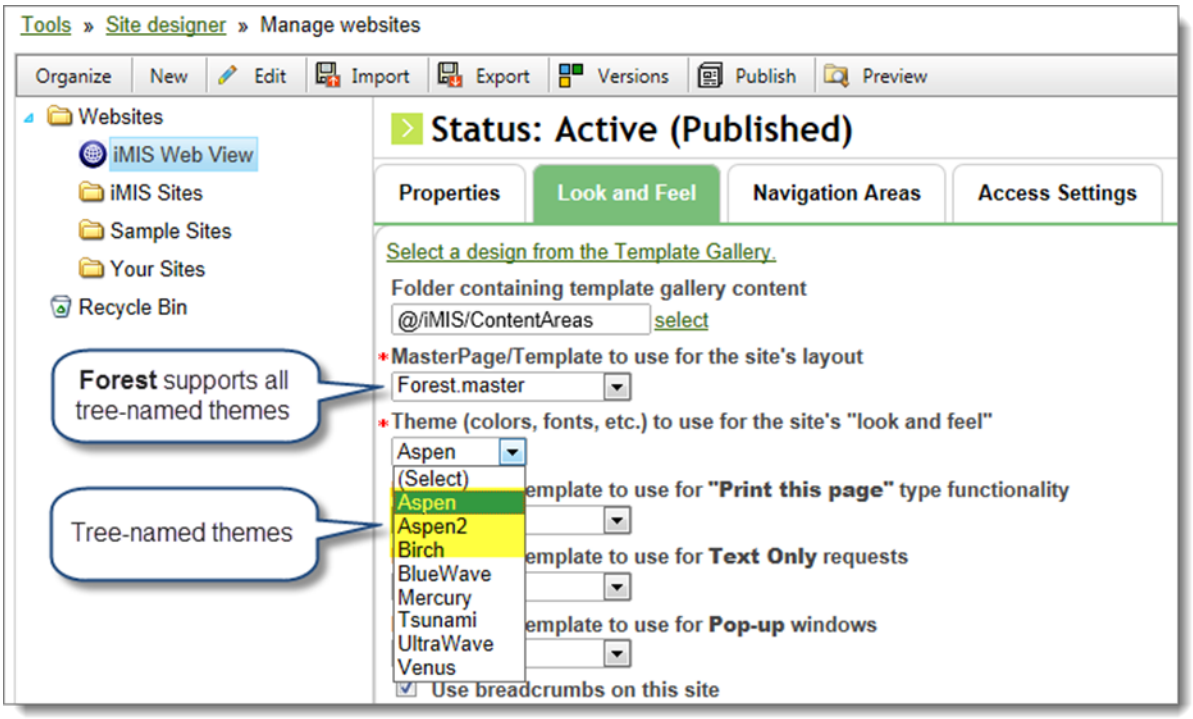
Creating guest-only links

A Site Designer option lets you hide navigation items from authenticated users, so that you can create links that guests alone will see. You can use this option, for example, to add a Create Account link that appears only to unauthenticated users. After signing in, users will no longer see a link prompting them to create an account. To apply this guest-only behavior to a navigation item, open its Options section and enable the This navigation item only displays for unauthenticated users option.

Modifying or defining website appearance

Changing your website theme

You can change the look and feel of your website by selecting different combinations of a master page and its matching themes. From Site designer > Manage websites, select your website. Then from the Site Look and Feel tab, choose one of the master pages and themes described below.



Example: Selecting a theme created for the Forest master page

The following designs are available out-of-the-box.

Forest.master

The set of tree-named themes can be used interchangeably with the Forest master page.

Available themes:

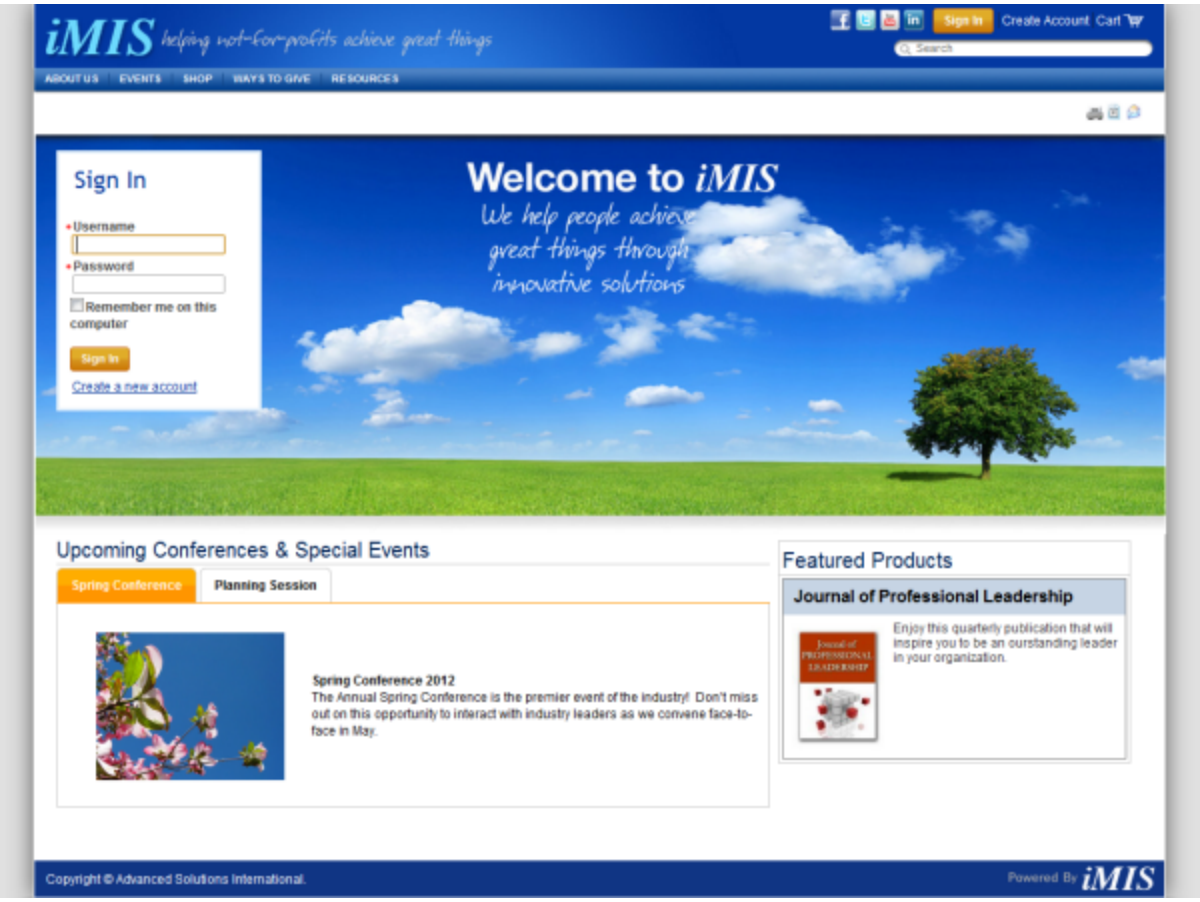
Aspen

iMIS
helping not-for-profits achieve great things
Sign In
Create Account
Cart
Search
About Us
Events
Shop
Ways to Give
Resources
Sign In
Username
Password
Remember me on this computer
Sign In
Create a new account
Welcome to iMIS
We help people achieve great things through innovative solutions
Upcoming Conferences & Special Events
Spring Conference
Planning Session
Spring Conference 2012
The Annual Spring Conference is the premier event of the industry! Don't miss out on this opportunity to interact with industry leaders as we convene face-to-face in May.
Join the Association
Benefits of membership include:
Education opportunities
Discount on items in our online shop
Free subscription to our e-newsletter
Opportunities for early event registration
Featured Products

Aspen2

iMIS helping not-for-profits achieve great things
Sign In
Create Account
Cart
Search
About Us
Events
Shop
Ways to Give
Resources
Sign In
Username
Password
Remember me on this computer
Sign In
Create a new account
Welcome to iMIS
We help people achieve great things through innovative solutions
Upcoming Conferences & Special Events
Spring Conference
Planning Session
Spring Conference 2012
The Annual Spring Conference is the premier event of the industry! Don't miss out on this opportunity to interact with industry leaders as we convene face-to-face in May.
Featured Products
Journal of Professional Leadership
Enjoy this quarterly publication that will inspire you to be an ourstanding leader in your organization.
Copyright © Advanced Solutions International.
Powered By iMIS

Birch



Planets.master

The set of planet-named themes can be used interchangeably with the Planets master page.

Available themes:

Mercury

Sign In | Create Account | Cart
Search
iMIS
helping not-for-profits achieve great things
About Us
Events
Shop
Ways to Give
Resources
Sign In
Username
Password
Remember me on this computer
Sign In
Create a new account
iNNOVATE
we help people achieve great things through innovative solutions
Upcoming Conferences & Special Events
spring conference
planning session
Spring Conference 2012
The Annual Spring Conference is the premier event of the industry! Don't miss out on this opportunity to interact with industry leaders as we convene face-to-face in May.
Featured Products
Journal of Professional Leadership
Enjoy this quarterly publication that will inspire you to be an ourstanding leader in your organization.
Volunteer your time to help us make a difference. Contact us to find out how you can help.
Copyright © Advanced Solutions International.
Powered By iMIS

Venus

Setting up website content

iMIS Content Management helps you create and manage unique content for your organization's websites and, if appropriate, lets you distribute authorship of the content.

Use iMIS Web Content Manager's powerful page layout and management abilities to:

- Add any type of content to your iMIS-managed websites, including third-party tools
- Define or modify the layout of pages, including using iMIS themes and style sheets
- Manage images
- Tag website content

- Define unique fields (user-defined fields) to add metadata to your content for filtering and sorting search results and tagged lists

Then use iMIS's user-friendly content editing features to:

- Allow authorized users to add content directly on a webpage
- Create and manage discussions and forums targeted to specific users

Content management terms

- Content – Individual block components that comprise the main content area of a website for any given web page.
- Content Page – Content layout information plus the iParts needed to render a web page.
- Content Type – Information required to configure the iPart, publish it, and display it.
- iPart – ASP.NET web part control that allows user to view, create and/or edit content.
- Main Content Area – Portion of a web page that contains authored content elements. These elements are arranged according to the definition of the content page currently being displayed. The remainder of a web page generally contains the web site's overall layout and site navigation elements.
- Tag – Type of metadata that associates a content page with a defined taxonomy for searching and displaying the content page within a website.
- Tagged List – iPart that aggregates content pages with specified tags into a display list.
- Tagged List Format – Information about the content and display of a tagged list iPart.

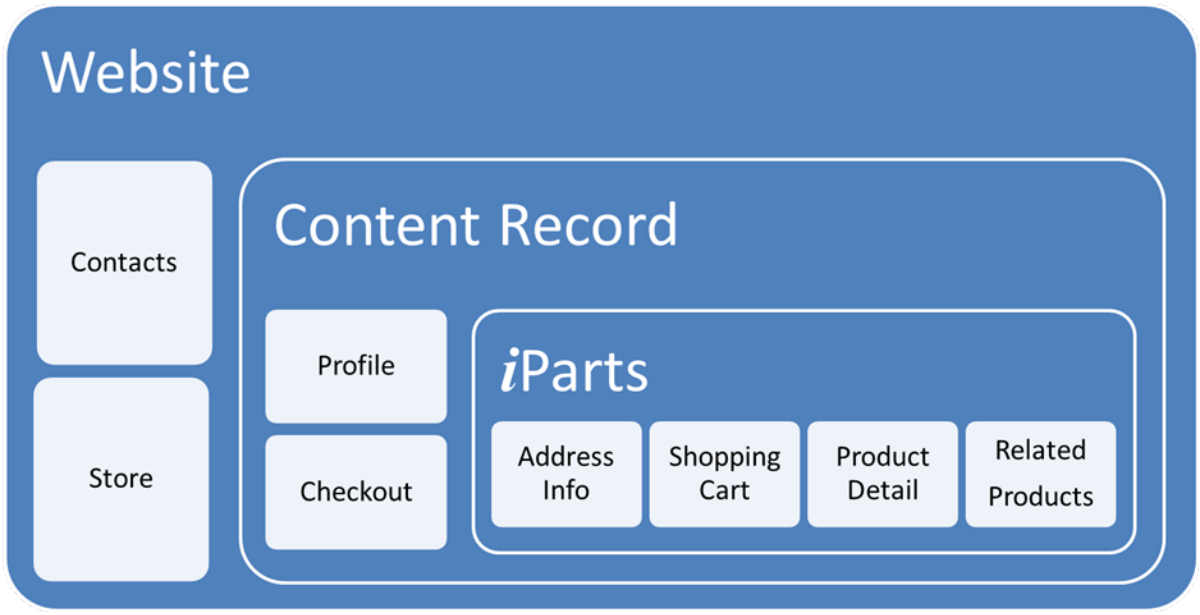
Templates

iMIS templates are:

- Lean - They render minimal HTML.
- Universal - They meet essential accessibility standards.
- Skinnable - They are easy to clone and re-style.

iParts

You can add any type of content to your iMIS-managed websites, including third-party tools. A simple, reliable method to add content is with iParts, mini-iMIS applications. iParts can be reused on multiple pages and can be configured to behave differently in each instance. You can even set up an area on a webpage for end users to directly create content on the page being viewed.



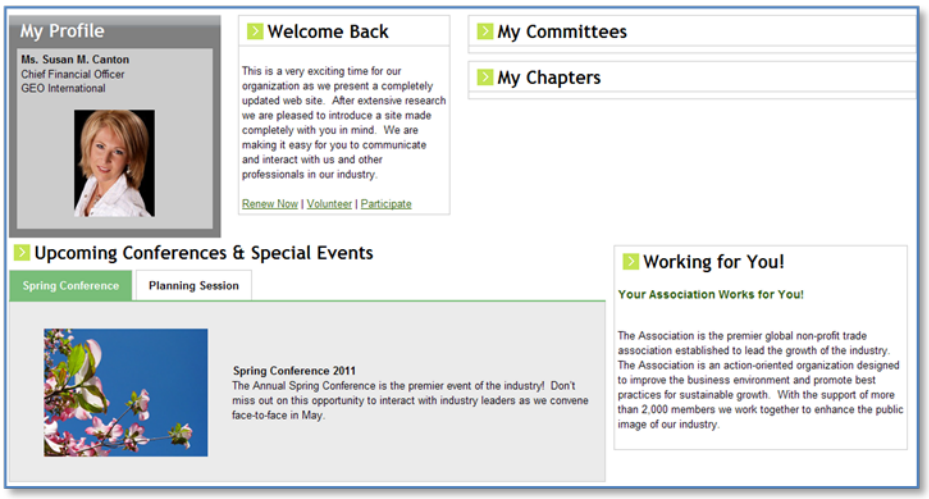
Using iParts in a website

iParts are small components of standalone functionality that can:

- Be configured to gather data and display it in a specific manner.
- Allow users to enter or edit data, such as changing a password or entering a contact's phone number.
- Be placed, alone or with other iParts and content, on a webpage in any desired layout.
- Pull together information, workflows, and applications into a meaningful user interface.
- Be reused. Each time you use the iPart, it can be configured to behave differently based on the purpose for that particular page.

- Tailor the look-and-feel, data, and workflow display for each user as they access the page.

  The following example shows a page containing several iParts.



  The security model governing iParts is very flexible. You can exclude users from an entire page of the interface or only a part of it, so that you present them with a display that is limited to only those functions for which they have appropriate permissions.

  For example, in a Contact Address iPart, you might allow some users to add a new address or to edit an existing one, but not to delete an address.

Content Tagging

Use iMIS Content Tagging to:

- Build a classification structure that matches your organization's needs
- Display specific types of content and personalize the information for a user
- Help users retrieve pertinent information from website searches

  Use the tagging features of iMIS to match your organization's needs. With a tagging hierarchy suitable to your organization, you can provide more consistent and predictable search results. You can define relationships between tags and the format for each list of tags to be displayed to users. You might set up a clean, simple style for search results

and a more crafted format for personalized pages. iMIS provides default styles for all out-of-the-box tagged lists.

Example: Content Tagging

Our organization would like our web visitors to see all the information, products, and events associated with their area of interest. We will define the following tags:

- Continuing Education
- Best Practices
- Advocacy

Now, each time we add an event, a product, an announcement, or other information, we will assign one or more of these tags to the content. When our users select one of these areas or searches on them, they will see all of the tagged information.

Tips for using iMIS Content Management

When you edit content in iMIS Content Management, you will see the default table-based page layouts, but when you navigate to the page containing the content, you will see a div-based layout. The divs that contain the webparts use the iMIS-WebPart style, which you can use and modify.

You can turn off div-based layouts and use table-based layouts throughout by editing the AsiPageAdapter.browser file and removing the line:

<adapter controlType="System.Web.UI.WebControls.WebParts.WebPartZone" adapter-Type="Asi.ControlAdapters.AsiWebPartZoneAdapter" />

Queries and reports

Intelligent Query Architect (IQA) offers simple, secure access to iMIS data for reporting, mailings, or letter and email merges. The user interface allows even those with limited SQL experience to perform SQL-like, query-building tasks.

Queries

Queries are a central concept in iMIS. They are used to extract data from the database, but they also drive many application elements. For example, queries are used as the source for many displays and reports. Query definitions are stored in the Document System.

The queries created in IQA use business objects and other queries as data sources. Queries can be simple, using a single source; or they can be complex, with multiple sources and different types of joins. Role-based security controls access to queries.

For administrator-level users, the main entry point for defining IQA queries from the Intelligent query architect task list item Tools, where you have access to the entire set of Document System folders. In addition, system administrators can edit the source queries directly on some webpages to adjust the display for your users. When this function is available, an Edit Source Query link displays.

Reports

IQA integrates directly with SQL Server Reporting Services (SSRS): queries can deliver results in a quick list view (Run) or in a fully formatted page layout (Report).

This Report view is a fast and easy way to create and print new iMIS reports and to generate starter reports for later development. SSRS reports are always bound to a single query.

User-defined fields

Fine-tune the search capabilities of your iMIS-controlled site with user-defined fields. Use these fields to add metadata to content and to filter search results. User-defined fields also help filter and sort content tagged lists.

User-defined fields can be displayed in a wide variety of formats to improve usability. For example, a date-oriented user-defined field will have a calendar control that makes it easy to select a date.

To create a user-defined field

1. Select Tools > Maintenance > User defined fields.

2. Click add and enter information, including:

- Select the Use In Search Flag option to add the value specified in the field to the "keywords" <META > element in the rendered page for the content record.
- Sort Order: Specifies the order in which this field appears in the total set of user-defined fields in content records. The value you specify must be in the range 1 to n, where n is the total number of user-defined fields in the system.

3. Click Save.

Managing security

Because iMIS uses a groups-based architecture, the security functions are very flexible. Use the iMIS security model to authenticate users, authorize access to functions and data, and audit the actions taken. Use the default scheme installed with the system or edit it to best meet your needs.

Understanding group membership

Before tackling security, note how iMIS approaches the group membership and statuses of your contacts:

- Status: iMIS separates the concepts of contact and group membership statuses. Because contacts can participate in a lot of activities independent of their membership status, contact-level status is limited to essentials, such as being Active or Deleted.
- Multiple memberships: iMIS supports a full-scale multiple membership model, which means that being a member of one group need not affect other memberships. For example, you could permit chapter membership without any primary association membership.
- IsMember: In iMIS, “IsMember” (“is a member”) for pricing purposes is determined by whether the user has a current membership in any of the groups whose type is marked as a “is member” group.
- Primary Membership: Primary group membership and “IsMember” memberships are entirely separate.

Claims-based security

iMIS provides a powerful security model where you can:

- Display only the information a user is authorized to view
- Display only the actions and functions a user is allowed to use
- Display a variety of information (such as pricing, shipping address, or notification preferences) based on the information known about the user

To provide this kind of flexibility, the security model is “claims-based”. This means the rights to access data or perform actions are assigned to users that meet certain criteria. When a user accesses the website, an authorization process checks a user’s rights (claims), determines whether they meet the criteria, and displays the authorized data and/or actions.

Users, by default, have complete access to the information about themselves. In addition, a user can receive a claim to other data in three ways:

1. Based on system role. System roles are:
   - Non-authenticated user: A user who has not signed in (a guest)
   - Authenticated user: A user who has signed in
   - System administrator: A user with complete access and privileges
2. Based on group membership. A group can be a committee, an event, a list of product purchasers, or any other group.
3. Based on the individual.

Only system administrators can create, edit, or delete security access settings for users.

Setting up security

As an Administrator, you will use the ClaimsMap.xml file to assign permissions (claim types) to roles or users for specific resources. These resources can be entity types like

"Party" or "Event," or they can be named groups of related entities called Security Resource Groups, such as “Membership” and “CommerceSettings”.

For example, the following excerpt from the ClaimsMap.xml file grants users whose role is SysAdmin access to all claim types in the Security Resource Group named “Membership”:

```
<m:RoleMap>
    <m:ClaimType>read,create,update,delete,execute</m:ClaimType>
    <m:Resource>Membership</m:Resource>
    <m:Role>SysAdmin</m:Role>
</m:RoleMap>
```

For claims that cannot be expressed in the ClaimsMap.xml file, use the ClaimTemplates.xml file: it consists of a set of permissions that apply to the access of particular entity types. Access is granted through "claim requirements" that are interpreted dynamically at runtime.

If access is granted in the ClaimsMap.xml file, no dynamic claims are evaluated. However, if no explicit access is granted in the ClaimsMap, claims in the ClaimTemplates.xml file will be evaluated.

For example, the following excerpt from the ClaimTemplates.xml file grants staff users full access to “Party” and grants an individual full access to their own information. Note that two claim requirements are granted to (1)permit access for staff users or (2) permit access for an individual .

```
  <m:ClaimsTemplate>
    <m:ClaimRequirements>
      <m:ClaimRequirement>
        <m:Detail>IsMemberOf;Staff;</m:Detail>
      </m:ClaimRequirement>
```

```
<m:ClaimRequirement>
<m:Detail>IsSelf</m:Detail>
</m:ClaimRequirement>
</m:ClaimRequirements>
<m:ClaimType>read,create,update,delete,execute</m:ClaimType>
<m:EntityType>Party</m:EntityType>
</m:ClaimsTemplate>
```

At runtime, the system checks to see if the signed in user is a member of the Staff group and grants them access. It also checks to see if the signed in user is the same as the Party and grants access.

To edit an individual's security settings

If you are a system administrator, you can add a contact to a group that allots claims to specific data and/or functions.

1. Select Tools > Setup > System > Security administration > Users.
2. Search for the desired contact by ID, Full Name Contains, or User ID.
3. Select the contact to be added.
4. In the User Information area, click add role or add group.
5. Select the system role or group membership for security for this user.
6. Click Save.

Examples

- Person edits information on website - Oscar goes to nationalwebbers.org. He sees the home page, which contains announcements and a list of scheduled events. He clicks the Sign In link and enters his username and password. The system checks the claims map and discovers that Oscar has no group membership or individual claim. The system then displays the page as presented to an authenticated (signed-in) user. Oscar clicks on My

Account to see his information. Because he is an authenticated user, he can edit his personal data. He edits his phone number and clicks Save.

- Person adds a contact - Eva, a staff member of the organization, needs to add a new contact to the database. She signs in and the system verifies that she is a member of the Staff group, so the system displays the staff home page. She clicks Add a contact, enters the required information, and clicks Save.

Default security settings

By default, system administrators have access to everything in the iMIS system. One of the most important privileges is access to the Tools menu, which provides access to:

- Intelligent Query Architect (IQA)
- System setup, including security
- Content and navigation design
- Business Object Designer (BOD)
- Reporting setup
- Entire document system

Default security for Contacts

Action	SysAdmin	Staff	User
View my contact information	■	■	■
Edit my information (mini-profile, profile picture, status)	■	■	■
Add or edit my username and password	■	■	■
Delete myself as a contact	■	■	-
View another contact's information	■	■	■
Add, edit another contact	■	■	-
Add, edit, or delete another contact mini-profile	■	■	-
Add, edit, or delete another profile picture	■	■	-
Add, edit, or delete another's status	■	■	-

Add or edit another's username and password	■	■	-
View information on my organization	■	■	
View information on other organizations	■	■	
Add, edit, or delete an organization	■	■	

Default security for contacts 1

Default security for Groups

Action	SysAdmin	Staff	User	Guest
View system group	■	-	-	-
View non-system group	■	■	-	-
Add, edit, or delete a group	■	■	-	-
Edit group membership	■	■	-	-

Default security for demographics

Action	SysAdmin	Staff	User	Guest
View my demographics	■	■	■	-
Edit my demographics	■	■	■	-
View another's demographics	■	■	■	-
Add, edit, or delete another's demographics	■	■	-	-

Default security for Events

Action	SysAdmin	Staff	User	Guest
View event	■	■	■	■
Create event	■	No-fee events	No-fee events	-
Edit event	■	No-fee events	No-fee events	-
Delete event	■	No-fee events	No-fee events	-
Register myself for event	■	■	■	-
Register on behalf of another	■	■	-	-

View function	■	■	■	■
Create function	■	No-fee event functions	No-fee event functions	-
Edit function	■	No-fee event functions	No-fee event functions	-
Delete function	■	No-fee event functions	No-fee event functions	-
Add function to itinerary before registration	■	■	■	-
Register myself for function	■	■	■	-
Register for function on behalf of another	■	■	-	-
Cancel my registration from event or function	■	■	■	■
Cancel registration for event or function on behalf of another	■	■	-	-
Check out and make payment	■	■	■	-

Default security for Commerce

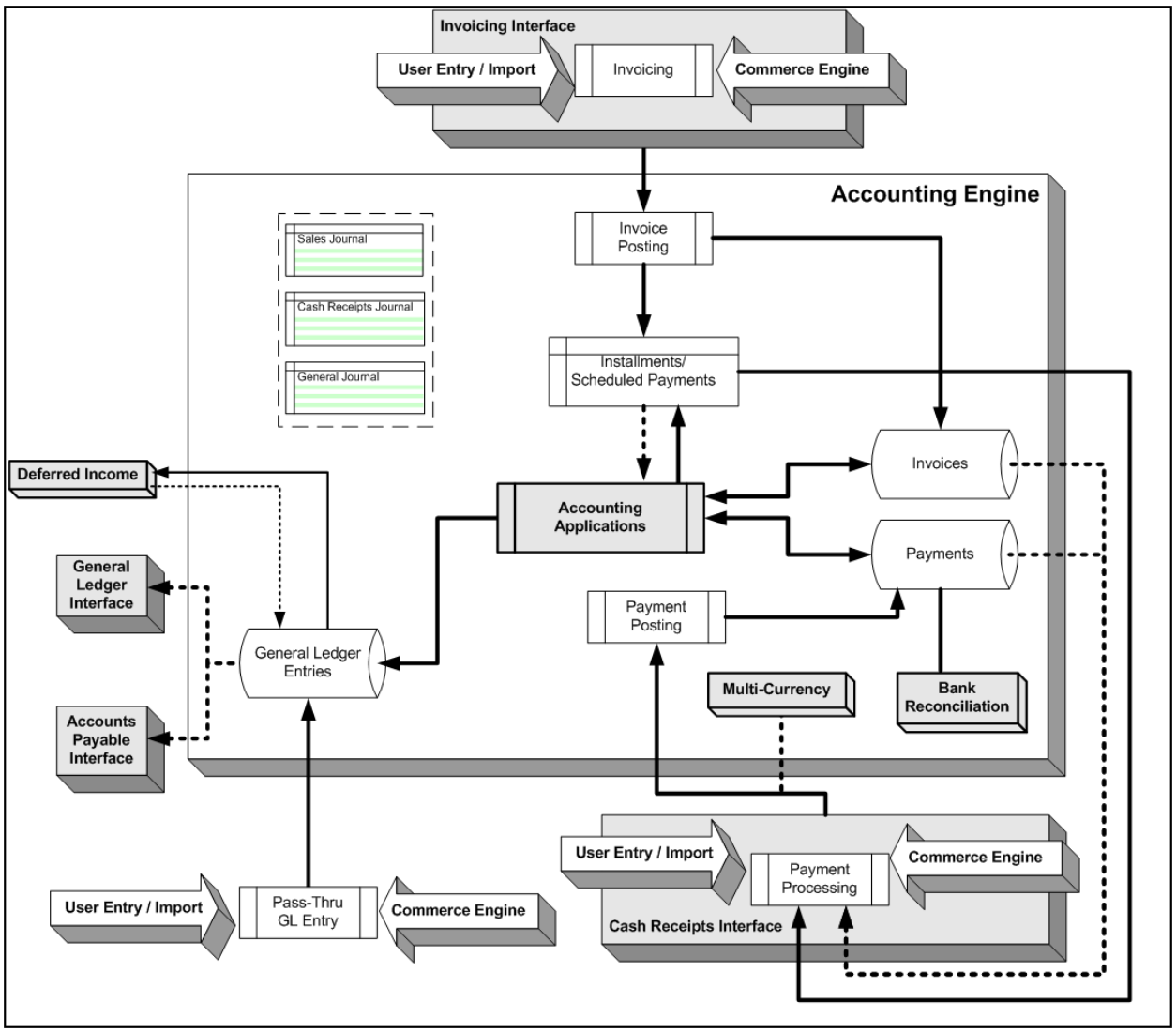
Action	SysAdmin	Staff	User	Guest
Shop	■	■	■	■
Create order	■	■	■	-
Enter order on behalf of another	■	■	-	-
Edit order	■	■	■	-
Delete order	■	■	■	-

Setting up financials

iMIS gives you the flexibility to set up your accounting treatment as best fits your organization:

- Use Cash or Accrual Accounting Method
- Create and track invoice data
- Create and track payment data
- Create and track GL transaction data
- Easily implement a thorough audit trail for all transactions
- Support multiple entities
- Specify batch processing options

The iMIS accounting treatment is consistent throughout the system and for all products. Orders, invoices, and payments are automatically routed to batches and are posted according to your specifications. See the following flowsheet for information on accounting processes in iMIS.



iMIS accounting engine

To specify general accounting options

1. Select Finance > Accounting Setup > General Options.
2. Enter the default accounting method for your system:

   Cash – Journal entries are created when an invoice is paid.

Accrual – Journal entries are created at the time of sale, with or without payment. The sale generates entries to the revenue and receivables accounts. When payment is made, the receivables amount is canceled and the cash revenue is recorded.

3. Enter the default currency and country for your system.
4. Enter the default tax category and payment terms for your system.
5. Select the order status upon which to Capture Credit Card. Select the number of months to Retain Gateway Log & Remittance History.
6. Click Save.

To define a financial entity

1. Select Finance > Accounting Setup > Financial Entities.
2. Click add.
3. Enter the information, including:

- Name and Code for the new entity.
- (optional) Default sets this entity as the default for your entire system.
- Invoice Tax Message lets you populate and save tax identifiers for this entity. If you administer iMIS in Canada, this is where you can specify the Harmonized Sales Tax (HST) number, to help you comply with Canadian tax laws.
- First Month of Fiscal Year.
- (optional) Logo lets you select or upload an image to use as the logo for this entity.

4. Click Save.

When a financial entity is created, a “clearing account” is created for the entity. If a transaction cannot find an assigned GL Account from the item information, the item class, or the default accounts list for the financial entity, the clearing account is used.

To define a GL account

A GL account is an individual account within the Chart of Accounts that is used to record a financial amount in a journal entry. GL account transactions are created by posting invoices, payments, and monetary applications.

1. Select Finance > Accounting Setup > GL Accounts > Chart of Accounts.
2. Click add.
3. Enter the GL Account and the Account Name. Select the Financial Entity for this account.
4. Click Save.

   The system displays the new GL account in the Chart of Accounts.

   Note: You cannot change the account code of a GL account after transactions have been recorded for the account. However, you can change the Account Name, if needed.

   To assign a default GL account for a financial entity

   You can define default GL accounts for each financial entity.

1. Select Finance > Accounting Setup > GL Accounts > Default Accounts.
2. Select the desired Financial Entity.
3. The system displays the list of default accounts.
4. Browse to select a different default account.
5. Click Save.

Financial reports

The following financial reports are supplied with your iMIS system.

- AR Statement – Statement of Account for customers with an outstanding balance
- AR Trial Balance – List of accounts with an open balance
- Batch Details – Invoice
- Batch Details – Posted Payments
- Batch Summary

- Invoice Details – Invoice information, Bill to/Sold to/Shipped to name and address, and item quantities/prices

Administrative Home

Your Administrative Console includes a Home page with quick access to features most often needed by staff.

Depending on your license keys, some areas may not be listed in your Administrative Home. The license keys needed for each area are:

- Membership and Dues (MEMBERSHIP)
- Events (MEETINGS or WMEET)
- Customer Service (SERVCEN)
- Commerce (W_ORDERS or ORDER)
- Fundraising (FUNDR or FUNDRAISING)
- Referrals (REFERRAL)
- Certification (CERT or CERTIFICATION)

Membership and Dues

Manage chapters

From the Manage chapters window you have full access to all chapter data maintenance, inquiry, and reporting functions. This access enables you to do the following:

- Activate and view chapter rosters of current, past, or future enrollees
- Maintain a list of enrollees and their terms
- Print a detailed roster of current, future, or past chapter enrollees
- Maintain the tables of chapter codes

To assign a member to a chapter

To add a member to a chapter, you need their customer ID and the code for the chapter to which you are adding the member. Before you can enter lists of chapter enrollees, you must define chapter codes on the Manage chapters window.

1. From Manage chapters window, select the chapter from the Chapters scrolling list to which you want to add the member.
2. Click New.
3. Enter the member's Id, or click the lookup icon to select an ID.
4. Select the appropriate enrollment Term.
5. (optional) Enter the From and Thru dates of the enrollment period.

   Note: When you enter the From date and press Tab, iMIS automatically populates the Thru field with a date one full year from the From date. You can override this value.
6. Click Save.

To edit a chapter enrollment

You can edit any information on a particular enrollee except the chapter to which the member is assigned, and the ID associated with the record.

1. From Manage chapters window, select the chapter from the Chapters list and a term selection that includes the record.
2. Select the record from the roster.
3. Click Edit.
4. Make your changes.
5. Click Save.

To delete a chapter enrollment

1. From Manage chapters window, select the chapter from the Chapters scrolling list and a term selection that includes the record.

2. Select the record from the roster.
3. Click Delete. A message displays prompting you to confirm the deletion.
4. Click Yes.

Running Chapter Reports

When you click the Print button on the Manage chapter rosters window, the Chapter Reports window opens. From this window, you can access five Chapter Management subsystem report types:

- Exports
- Labels
- Month End
- Rosters
- Statistics

To run a chapter report

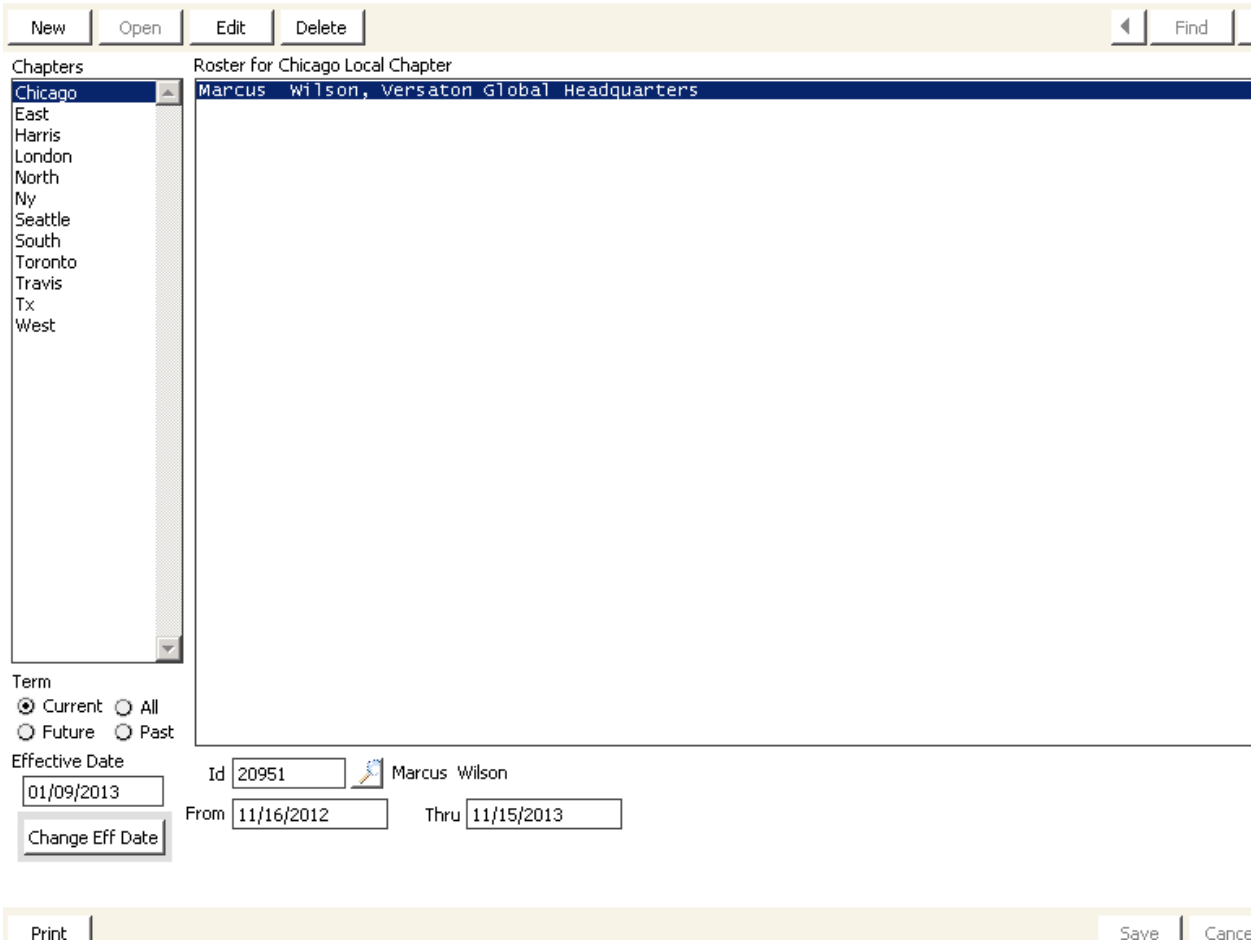
Before running a standard report, check your printer destination.

1. From Manage chapters window, click Print.
2. From Report Types, select a report type.
3. From Available Reports, select a report.

   Note:Check the description of the report in the Description field at the bottom of the window.
4. Click Run.

   The Chapter Selection window opens.
5. (optional) Select your print options.
6. Click OK.

Manage chapters window



Admin Console: Home > Membership and Dues > Manage chapters

Desktop: Customers > Manage chapter rosters

Chapters

Lists the chapters.

Roster for

Displays the members enrolled in the selected chapter for the selected term.

Term

- Current – Enable to display only those members who have terms that include the date displayed in the Effective Date field. The From date must be on or before this date and the Thru date must be on or after this date.

- All – Enable to display in the roster, all members who have served, are serving, or will be a member of the chapter.
- Future – Enable to display only those members whose term beings in the future (the From date is after the Effective Date).
- Past – Enable to display only those members whose terms have expired (the Thru date is before the Effective Date).

  Effective Date

  Displays the date upon which the radio button selections are based. Defaults to the current system date.

  Change Eff Date

  Enables edit of the Effective Date field.

  Id

  Specifies the member's ID number, or click the lookup icon to select an ID. When you enter the ID, the member's full name displays to the right of the field.

  From

  Specifies the start date of the term.

  Thru

  Specifies the end date of the term.

  Print

  Opens the Chapter Reports window where you can export chapter membership data as well as print rosters and a month-end report based on chapter enrollments, statistical reports, and labels.

Manage committees

The Manage committees window enables you to assign customers to a committee, edit their assignments, delete assignees, and report this information to other committee

members. This window also enables you to enter and track applicants and proposed committee members in advance of actual appointments being made.

The Committee subsystem of iMIS Customer Management tracks committee members, their respective terms, and the positions they have held. The Manage committees window gives you full access to all committee data maintenance, inquiry, and reporting functions, enabling you to do the following:

- View committee rosters of past, current, and future members
- Maintain a list of members and their positions and terms
- Maintain a list of committee applicants and proposed members
- Create and store minutes on any committee meeting or activity
- Print a detailed roster of past, current, and future committee members and applicants
- Print personalized letters to any committee grouping
- Print labels for any committee list
- Maintain the tables of committee codes and positions

To assign a member to a committee

To add a member to a committee, you need the following information:

- Customer ID
- Code for the position in which the member will serve
- Date range for the appointed term

1. From Manage committees window, select the committee code that you want the member to be associated with from the Committees field.
2. Select the appropriate type by enabling one of the following options:

- Committee
- Proposed

- Applicants
- Show All

  For example, if you want to add applicants instead of actual committee members, enable the Applicants option before entering the applicant. Otherwise, iMIS assumes you want to enter an appointee.

3. Click New. Your insertion point moves to the ID field.
4. Enter the customer ID of the appointee, or click the lookup icon to select an available value.
5. (optional) Enable the No Mail option to exclude the given appointee from committee-specific label runs.
6. Enter the appointee's position code in the Position field or click the lookup icon to select an available value.
7. Enter the start date of the appointee's committee term in the From field.
8. Enter the ending date of the appointee's committee term. If the default committee duration has been defined by your administrator, you can keep or override this value.
9. Enter any additional information you want to record for the appointee in the Notes field.
10. Click Save.

    To edit a committee appointment

    In the Manage committees window, you can edit any information on a particular appointee except:

- The committee to which the member record is assigned
- The ID associated with the record

  If either the committee or the customer ID is wrong, delete the existing record and insert a new record containing the correct information.

1. From Manage committees window, elect the committee code from the list in the Committees field (including any necessary filtering selections). Make sure you include a term selection that includes the member's record.
2. Highlight the customer record in the list of committee appointees.
3. Click Edit.
4. Make any necessary changes.
5. Click Save.

To delete an appointee from a committee

1. From Manage committees window, select the committee code from the list in the Committees field. Make sure you include a term selection that includes the customer's record.
2. Highlight the customer record in the list of committee appointees.
3. Click Delete. A system message prompts you to verify the deletion of the selected record.
4. Click Yes.

To change a committee appointment type

After preliminary or final appointment selections have been made, you can change the appointee's status as necessary.

1. From Manage committees window, select the committee code from the list in the Committees field (including any necessary filtering selections). Make sure you include a term selection that includes the customer's record.
2. Highlight the customer record in the list of committee appointees.
3. Select More on the Manage committees window to display a menu of maintenance choices.
4. Select one of the following options:

- Move to Committee to change the member to a permanent appointee
- Move to Proposed to change the member to a proposed appointee

- Move to Applicant to reassign a member to an applicant

  A warning message box is displayed.

5. Click Yes.

To insert committee minutes

1. From Manage committees window, select the committee code from the list in the Committees field.
2. Click More, and select Minutes to open the Minutes window.
3. Click New.

   Note: The cursor moves to the Date field and automatically populates it with the current date.
4. Enter the date for which you want the minutes to be recorded in the Date field.
5. Enter the minutes of the committee meeting in the Minutes field.
6. Click Save.

   Note: Recorded minutes are listed by date in the Minutes List field of the Minutes window.

To print committee minutes

1. From Manage committees window, select the committee code from the list in the Committees field.
2. Click More, and select Minutes to open the Minutes window.
3. Select the minutes to be printed from the Minutes List field.
4. Click Print.

Running Committee Reports

There are three Committee Management subsystem report types:

- Committee
- Proposed

- Applicant

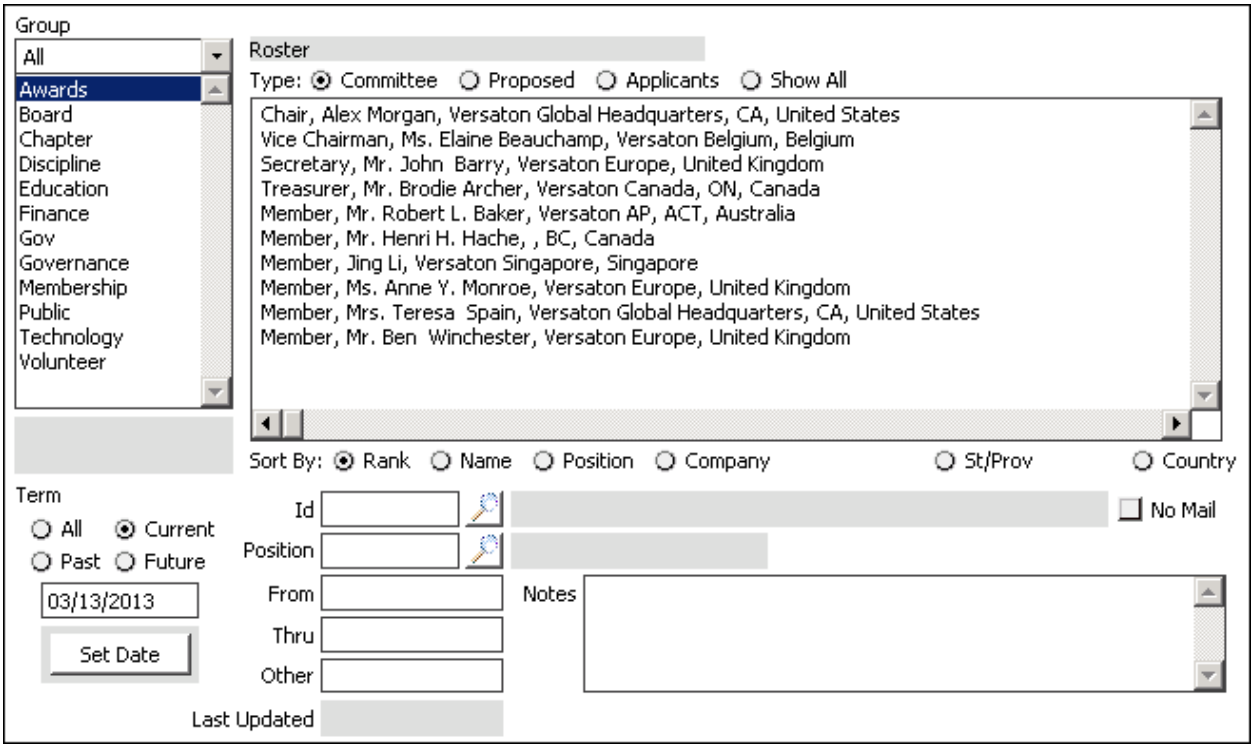
The print dialog box lets you customize your reports by selecting various committees, positions, and terms in the search.

To print committee reports

1. From Manage committees window, select the committee, and click Print to open the Committee Reports window.
2. From Report Types, select a report type.
3. From Available Reports, select a report format.
4. Click Run to open the Committee Selection window.
5. Select the committee options that you want your report to contain.

   Note: The options available vary depending on the type of report selected.
6. Click OK.

Manage committees window



Admin Console: Home > Membership and Dues > Manage committees
Desktop: Customers > Manage committees

Filter by Co ID

The Filter by Co ID option is visible only if enabled during system setup. Although rarely used, this feature enables you to link a committee to the ID of a company record. For example, if you have set up a committee named Awards, and a company has 25 branches and each branch has an Awards committee, you normally would need to create 25 separate Awards committees with each having a slightly different name. Instead, you create 25 company name records that represent your branches.

With Filter by Co ID enabled, you can open the Awards committee and set the filter to work with only one of the 25 branches. A Find window will open so you can locate the company ID to filter by.

Group

The Group field is a drop-down list that enables you to view either all committees or committees that have been assigned to a specific group.

Committees

The Committees field displays the current list of the committee codes that have been defined in the Committee Codes window.

Type

Designates one of the following display filters:

- Committee – All committee members are displayed.
- Proposed – Proposed committee members are displayed.
- Applicants – Committee applicants are displayed.
- Show All – Committee members, proposed members, and applicants are displayed.

Roster

The Roster field displays the currently selected committee's member list (affected by Type and Term choices).

Sort By

Designates one of the following sort orders:

- Rank – Sorts members by the rank assigned to their positions in the Committee Positions window.
- Name – Sorts members alphabetically by last name.
- Position – Sorts members alphabetically by position title.
- Company – Sorts members alphabetically by company name.
- St/Prov – Sorts by the member's Name.STATE_PROVINCE, then Name.LAST_FIRST, both in alphabetic ascending order (A-Z, a-z).

  Note: The State/Province radio button will be labeled according to the value set up in Customer Setup – Address and Notes > State/Province.
- Country – Sorts by the member's Name.COUNTRY, then Name.STATE_PROVINCE, then Name.LAST_FIRST, all three in alphabetic ascending order (A-Z, a-z).

Term

Designates on of the following term filters:

- All – Displays all members who have served, are serving, or will be serving on the committee.
- Current – Displays only those members who are currently serving on the committee.
- Past – Displays only those members whose terms have concluded.
- Future – Displays only those members whose terms begin in the future.

Set Date

Activates the date field by which member terms are evaluated (date defaults to the current system date).

ID

Designates the ID of the currently selected or added member.

No Mail

Exempts the committee member from committee-specific label runs.

Position

Designates the position the member holds in the selected committee.

From

(required) Designates the start of the member's committee term.

Thru

Designates the end of the committee member's term. It defaults to the specified Default Duration (usually 12 months) after the From date.

Other

Designates a user-defined value corresponding to the type or category of educational credit awarded the member, if applicable. The value specified is displayed in the bottom of the member's Activity Detail window if your administrator has defined a prompt for the CEU Type field for the COMMITTEE activity type.

Last Updated

(read only) Shows the last date the record was updated.

Preference

Indicates an order of preference expressed by applicants for more than one committee position. For example, if an applicant wants to be President of a committee but has a second choice of Vice President, create two committee records for the applicant. The first record would have a position of President and a preference of 1. The second record would have a position of Treasurer and a preference of 2. This field is only displayed when Proposed or Applicants is enabled.

Notes

Specifies notes about the individual.

Print

Opens the Committee Reports window from which you can print committee reports.

More

Opens a menu of maintenance choices:

- Minutes – Opens the Minutes window where you can maintain minutes for the active committee. Minutes are accessed by the date that they were stored. You can open the minutes for any meeting and view or transfer them to a letter, report, or other area for printing. You can open an existing minute's entry to work from or to insert a new set of minutes. Each entry consists of the date and the text of the minutes. All standard data maintenance procedures apply.
- Committee Codes – Opens the Committee Codes window where you can add, edit, and delete committee codes.
- Committee Positions – Opens the Committee Positions window where you add, edit, delete, and assign the rank for committee positions.
- Move to 'Committee' – Assigns the currently selected individual to the currently selected committee as a member.
- Move to 'Proposed' – Assigns the currently selected individual to the currently selected committee as a proposed member.
- Move to 'Applicant' – Assigns the currently selected individual to the currently selected committee as an applicant.
- Check 'Paid Thru' – Checks the currently selected individual's name and linked chapter or area with that chapter's paid thru date. If the selected individual is not linked to any chapter or area, iMIS displays a prompt to notify you.

Enter and edit payments

As you enter a payment, iMIS automatically completes the following tasks:

- Updates the product open item (if any)
- Moves the Paid Thru date forward by a preset period (when paid in full)
- Creates the proper activity/history records

Entering a full payment

You can apply full payments to the open balance line items in product payment priority order.

To enter a billing payment

1. From Enter and edit payments window, click New.
2. (optional) Override the Transaction Date, if necessary.
3. Enter the customer ID. If you do not know the customer ID, select the lookup icon in the ID field to look up the customer in the database. The window displays any line items associated with the customer ID and the total outstanding balance.
4. Enter the Source Code that prompted this payment and press Tab.
5. Enter the check number or credit/debit card code and press Tab. For credit/debit cards, enter the required card information.
6. Enter the amount of the payment in the Pay Amount field and press Tab.

   The payment amount is applied automatically to each open line item, beginning with the main customer dues product. As full payment is applied to a line item, the Paid Thru date field advances to the end of the bill term or beyond.

   Note: Complimentary or zero dollar items can be denoted by an asterisk (*) on the Enter and edit payments window. The Paid Thru date advancement for complimentary billing items billed through Create Invoice follows the rule established by the billing cycle that is selected on the Process billing window. To update the Paid Thru date for zero dollar items, double-click the line item.
7. Click Save. Verify that the payment information is updated on the Billing tab.

   To apply payment to a different line item

The Enter and edit payments window automatically applies the lump sum amount paid to the open balance line items in product payment priority order. Occasionally, the payment may need to be applied to line items other than the ones the payment window automatically selects. To apply a dues payment to a different line item, perform the following:

1. From Enter and edit payments window, click New.
2. Enter the customer ID and press Tab.
3. Enter the payment information. The payment amount is applied automatically to the open (positive) line items according to the payment priority rankings assigned to each product code (from lowest to highest). In the following example, iMIS applied $20 to the Journal Subscription.
4. Double-click the line item to remove the amount paid (in this example, the Journal Subscription line item). You can manually override the amount applied to a line item by selecting the line and entering the desired amount in the Amt Paid field.
5. Double-click the line item where the payment should be applied (for example, PAC Contribution).
6. Click Save.

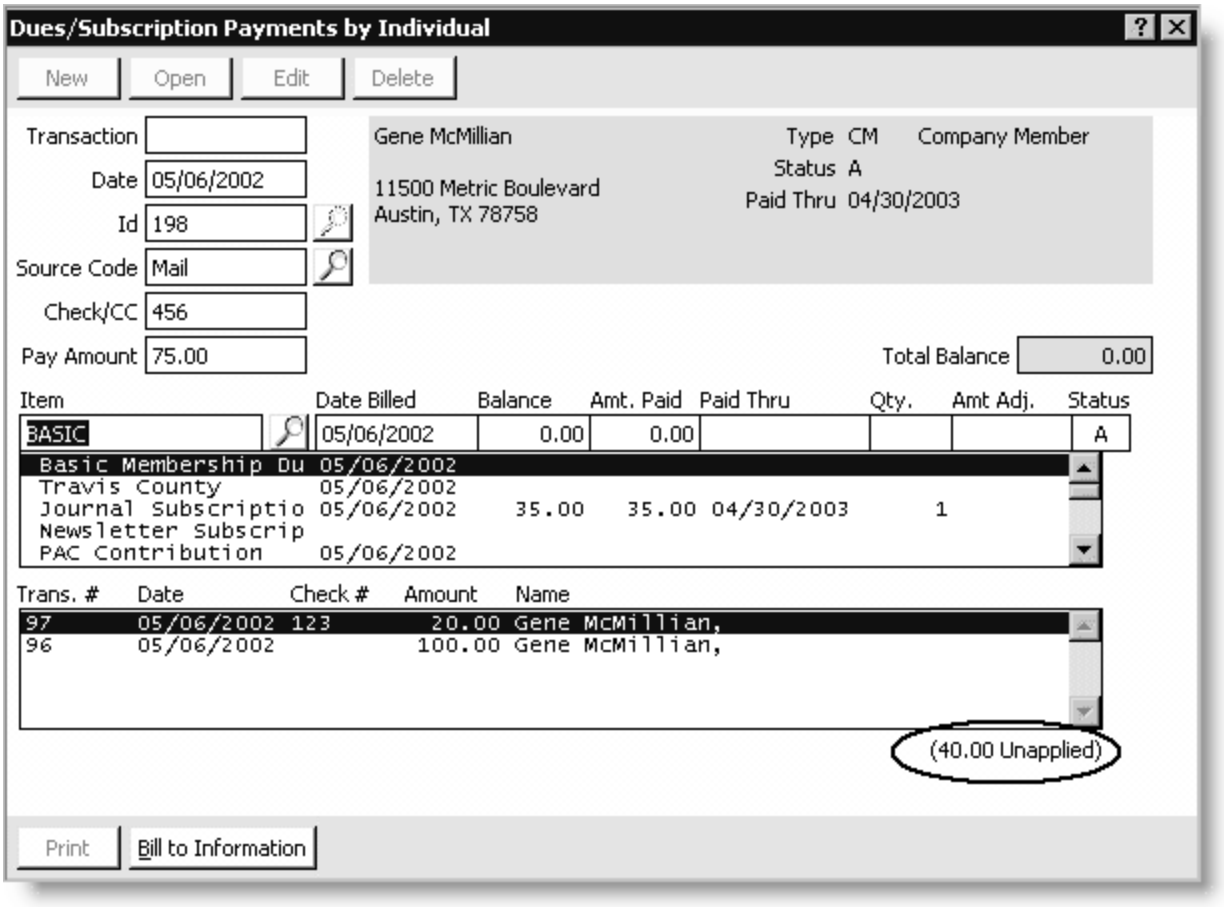
Entering an overpayment

Overpayments can be processed in one of three ways:

- Transfer open credit to AR/Cash so you can refund the overpayment or apply the credit to current or future sales items
- Apply overpayment to offset next year's dues by using AVAIL_CREDIT
- Apply overpayment to another product credit by using _CREDIT

If an overpayment for dues is received, process the payment as described in To enter a billing payment. Enter the amount of the actual payment in the Pay Amount field. The amount that is needed to pay the dues items (for example, the remaining balance) will be

applied. The overpayment amount (amount not applied) displays in parentheses at the bottom of the window.



Dues/Subscription Payments by Individual window showing overpayment

To transfer open credit to AR/Cash

If you transfer an open credit to AR/Cash, you can refund the over-payment or apply the credit to current or future sales items (such as an order or an event registration).

Note: You cannot create an open AR credit unless the Cash Dues Over/Under Payments Create AR option is selected on the Set up general options window.

1. From Enter and edit payments window, click New.

2. Tab to the ID field and enter the customer ID, or click the lookup icon to select a value.
3. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
4. Enter the check number or credit/debit card code in the Check/CC field, and press Tab. For credit/debit cards, enter the required card information.
5. Enter the amount of the actual payment in the Pay Amount field. The amount needed to pay the billing items (for example, the remaining balance) is applied. The amount of the overpayment (amount not applied) displays in parentheses at the bottom of the window.
6. Click Save. A system message is displayed asking you to confirm the creation of an AR item for the overpayment.
7. Click Yes. This overpayment can be refunded on the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices), or applied to other open balances such as meeting registrations or orders by using the *TAB feature.

   Note: For more on refunding an overpayment, see Accounts Receivable.

   To apply overpayment to offset next year's billing

   Overpayments can be applied to a special credit product by using the _CREDIT product code. The _CREDIT product code retains credit balances and prints the billed amounts and credits separately.

1. Set up a credit product. The following steps are required to process credits that print as separate line items on subsequent bills:

1. Insert a product code that ends in _CREDIT on the Set up billing products window (in Admin Console, go to Configure > Billing > Set up billing products). Do not use AVAIL_CREDIT.
2. Select the credit product on the scrolling list on the Set up billing cycles window (in Admin Console, go to Configure > Billing > Set up billing cycles) so it will print on the renewal notice when an overpayment balance exists for a renewing customer.

3. Enable the Maintain Prev Balance option on the Set up general options window (in Admin Console, go to Configure > Billing)

   Note: If your billing cycle sort method is by product rank, assign a large number to the credit product if you want the credit listed at the bottom of the line items.

2. From Enter and edit payments window, click New.
3. Tab to the ID field and enter the customer ID, and press Tab.
4. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
5. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
6. Enter the amount of the actual payment in the Pay Amount field. The amount that is needed to pay the dues items (for example, the remaining balance) will be applied. The amount of the overpayment (amount not applied) displays in parentheses at the bottom of the window.
7. Apply the overpayment to the special credit product code. For this example, we have inserted a product code of BILLING_CREDIT.

1. Select the empty space immediately below the last line item displayed.
2. Select the Item field.
3. Enter the product code for the special credit line (for example, BILLING_CREDIT), or select the lookup icon and double-click the DUES_CREDIT product code.
4. Tab to the Amt Paid field and enter the overpayment.

8. Click Save.

   The overpayment credit should appear as a separate, negative line item on the next bill generated for this customer. Credit line items must then be offset against positive line items manually on the Enter and edit payments window. If the overall balance of the bill is positive, this manual offset process can occur when the payment is received and entered.

Entering a partial payment

Underpayments can be processed in one of three ways:

- By leaving underpayment balances in Billing;
- By transferring underpayment balances to AR; or
- By adjusting residual balances.

If Maintain Prev. Balance was selected on the Billing window (Configure > Billing), you can leave underpayments in Billing or you can adjust the balance.

If the Cash Dues Over/Under Payments Create AR option was selected on the Billing window(Configure > Billing), you can transfer underpayment balances to AR.

If both of these options are selected, the underpayment balances can be transferred to AR, left in Billing, or you can adjust the balance.

To leave underpayment balances in Billing

If a partial payment is received, the unpaid balance appears in the Total Balance field, the Paid Thru date is not advanced, and the residual balance continues to be tracked as an open item in the Billing module. Since the Paid Thru date is not advanced, the remaining balance will print on subsequent Reminder Notices until full payment is received.

Note: The remaining balances that print on Reminder Notices for billings with partial payments do not include VOL products.

1. From Enter and edit payments window, click New.
2. Tab to the ID field and enter the customer ID.
3. Press Tab.
4. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
5. Enter the amount of the actual payment in the Pay Amount field. iMIS automatically applies the amount paid to the open line items until the amount paid has been fully

applied. In the following example, the balance due was $115 and we entered a $50 payment.

6. Click Save.

To transfer underpayment balances to AR

Use the following steps to enter a partial payment, transfer the underpayment balance to AR, and show dues as paid in full.

1. From Enter and edit payments window, click New.
2. Tab to the ID field and enter the customer ID, and press Tab.
3. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
4. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
5. Enter the amount of the actual payment in the Pay Amount field. In the following example, the balance due was $95 and we entered a single payment of $55.
6. Select each line item and enter the full amount due in the Amt Paid field.

   As you override the Amt Paid, the difference between the payment entered and the amount applied displays as over applied at the bottom of the window.
7. Click Save. A message is displayed asking you to confirm the creation of an AR item for the over applied payment.
8. Click Yes.

   The remaining balance transfers to AR/Cash as an open receivable. The balance will appear on the AR statements instead of future Dues Billing Reminder Notices.

To adjust residual balances

In certain cases, you may want to write off or reduce the residual balance left from an underpayment, particularly if the remaining balance is insignificant. You also may want to

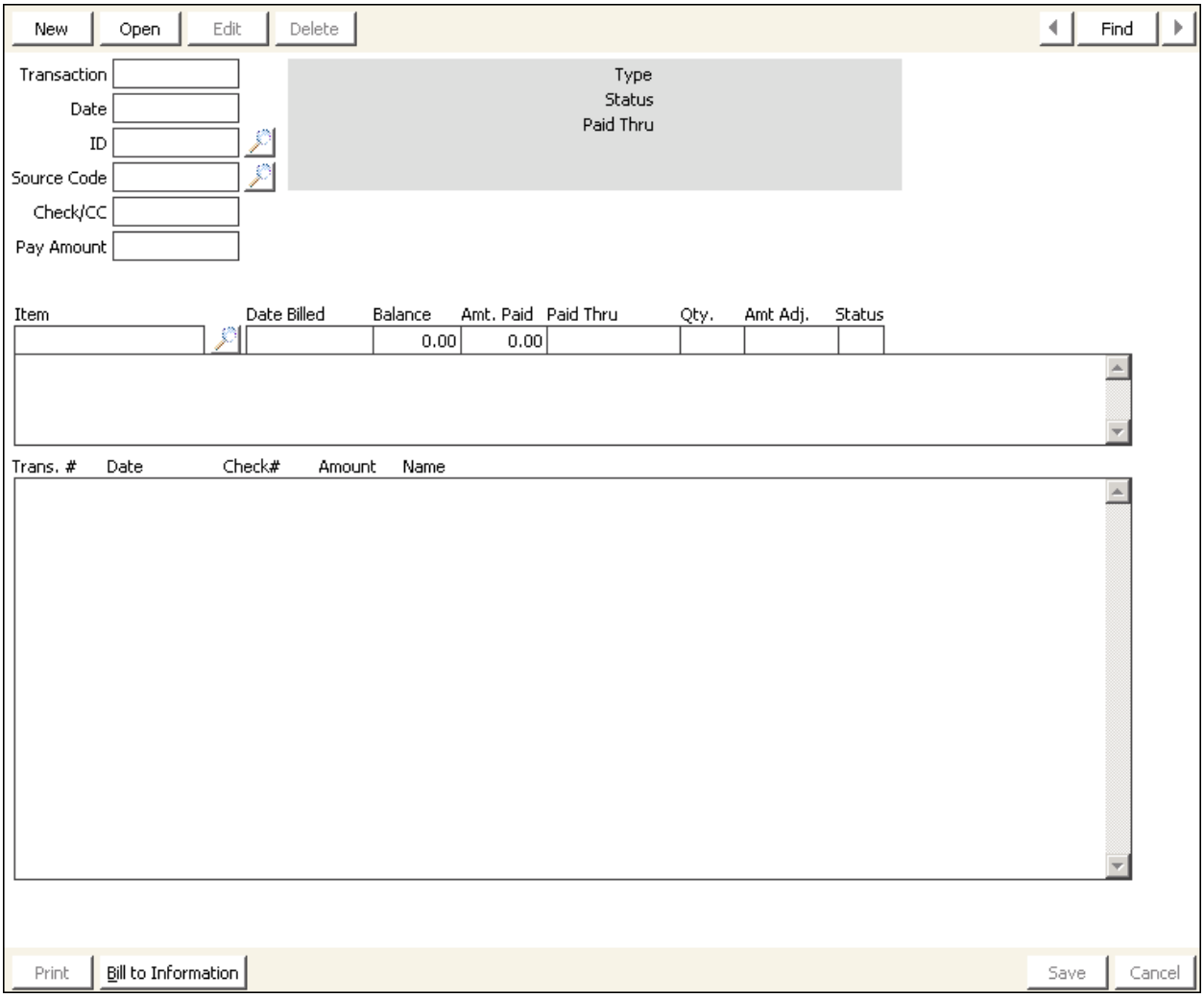
use the adjustment method to officially record decisions to award a post-billing discount for a line item.

Note: Entering this adjustment makes no credit or debit entries into any accounts, including the write-off account.

1. From Enter and edit payments window, click New.
2. Tab to the ID field and enter the customer ID, and press Tab.
3. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
4. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
5. Enter the amount of the actual payment in the Pay Amount field. In the following example, the balance was $75 and the payment was $60.
6. Select the line item for which the Amt Paid (applied) is less than the balance.
7. Enter the positive difference between the Balance and Amt Paid in the Amt Adj field.
8. Click Save.

   Note: An activity tracking record will be generated even when no payment is applied (for example, when a full complimentary discount is being applied).

Enter and edit payments window



Admin Console: Home > Customer Service > Enter and edit payments
Desktop: Billing > Enter and edit payments

Transaction

When you complete a payment transaction, iMIS assigns a sequential number in this field. This field cannot be changed.

Date

The transaction date defaults to the current system date and can be overwritten. If Batch Control is used, this date defaults to the batch date and cannot be overwritten.

ID

Specifies a customer ID or select the lookup icon to select a value.

Source Code

Specifies a user-defined code, often used for marketing purposes, or select the lookup icon to select a value. Validates from the SOURCE_CODE table and is required if the Force Source Coding option is enabled on the Customer Setup - Basic Options window.

Check/CC

Specifies the payment's check number or credit/debit card abbreviation (for example, VISA, MC, DISC, or AMEX). To enter a credit/debit card payment, the credit/debit card code must be defined on the Set up cash accounts window. When a credit/debit card code is entered, iMIS displays the following additional fields where you can enter specific card information.

- CC # – Enter the credit/debit card number.

  Note: For credit cards only, if you enter the credit card number incorrectly, a message is displayed informing you that the credit card did not pass validation and asking you if you want to override the validation check. Make sure to reenter the card number correctly.

- CSC – (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code (CSC). You can make the CSC a required value for specific credit/debit card cash accounts. See Accounts Receivable for more on making the CSC a required value.
- Exp – Enter the card's expiration date (mm/yy).
- Authorize – Enter any authorization code here.
- Name on CC – Enter the name as it appears on the card.
- Issue # – (Displays only when the associated cash account accepts an issue number) Enter the European debit card's issue number.

- Issue Date – (Displays only when the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Pay Amount

  Specifies the amount paid. The payment amount is applied automatically to each open line item, beginning with the main customer dues.

  Total Balance

  This field is automatically populated with the outstanding balance for all product items.

  Item

  Specifies a line item, or click the lookup icon to select a value. To enter a new line item, highlight a new line and enter the new product.

  Date Billed

  This field is automatically populated with the date the line item was billed.

  Balance

  This field is automatically populated with the outstanding balance for the line item.

  Amt. Paid

  Displays the payment amount for the line item selected. You can also use this field to manually override amount paid for an individual line item.

  Paid Thru

  Specifies the date through which payments have been applied for the line item. As full payment is applied to a line item, the Paid Thru date field advances to the end of the bill term or beyond.

  Qty.

Specifies the number of the line items purchased.

Amt Adj.

Specifies the dollar amount to be adjusted from this line item.

Status

(Defaults to current status) Specifies the product's billing status. The status code field relates to whether the subscription line item is active or inactive. This field determines if this product will be billed again, but does not relate to the Amt Adj field.

Updated information list

Displays the Trans #, Date, Check#, Amount, and Name fields.

New Bill From

(Displays when processing bills for new customers) This option works the same way as the Effective Date on the Process billing window. If billing is based on an annual schedule, the New Bill From date must be set to the first day of the first month of the annual term even if the customer has a Join Date subsequent to that date. (For example, if the annual term starts on 01/01/2001 and the customer joined 07/15/2001, the New Bill From date must be 01/01/2001.)

For anniversary billing, the date is set to the first day of the month in which you are processing the billing payment or to the value entered on the Advance Start Month as of field.

Bill New Mem Type Items

(Displays when processing bills for new customers) Enable to automatically select all Dues products that are listed in the Set up customer types window for that customer type.

Bill to Information

Opens the Bill to Information window where you can enter the Bill to ID, as well as the name and address of the entity being billed.

Bill New

Automatically generates and displays billing data for the line item. (Is displayed when the main dues product has never been billed or a new line item is added)

Bill membership dues

The billing process involves entering payments, updating billing expiration (Paid Thru) dates in each customer's record, creating history (activity) records for each customer and line item paid, and generating cash/income accounting transactions that produce reports and then post to the GL interface.

The billing procedure is designed to be as automatic as possible, minimizing extra steps and user intervention. Within one window, you can generate initial and reminder notices, produce bills for a large group of customers, perform individual and mass billing, and run bills for specific selection criteria such as customer type, Paid Thru date, and Renewed Thru date.

iMIS Billing allows multiple line items for each dues bill-up to ten standard items per customer type and optional subscription, section, and chapter lines. The billing periods can be set up at a system-wide default interval and overridden at the individual customer or product level. Intervals can be controlled to affect the billing amounts and the expiration (Paid Thru) dates.

Caution! Billing affects critical data throughout the database. Never generate Renewal Notices without first creating a backup copy of your iMIS data!

Running mass dues billing

Mass billing enables you to process a billing cycle for all customers who match the parameters defined in the selected billing cycle. The system decides which customers to bill by comparing the Paid Thru dates to the renewal Effective Date. iMIS also decides what and how much to bill based on your settings. (See Defining Special Pricing, Setting up Customer Types, and Defining Product Codes). You can run a mass billing cycle to print initial bills, first or second reminders, or run a billing cycle for all print options concurrently.

For example, you enter a Run Date of 9/26/2013 for all print options and the billing reminders that were set as:

- Initial Bill Cut Off = 3
- First Reminder Start = -2 and Cut Off = -1
- Second Reminder Start = -3 and Cut Off = -2

iMIS searches the database for customers who match the billing cycle parameters. An initial billing is generated for all customers who have a Paid Thru date before 12/01/2013 (applies to anniversary only). iMIS runs first reminders for unpaid customers whose initial billing was sent between 7/01/2013 and 8/01/2013 and second reminders for those who were initially billed between 6/01/2013 and 7/01/2013.

Caution! Before initial billing is run, print a test-billing run and verify the results.

To run initial mass dues billings

Caution! If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

1. From Bill membership dues window, click New.
2. Select the Renewals Billing Options. The default Effective Date field automatically displays. Select Renewals to process new renewals.
3. Select a billing cycle to process that was previously created in the Set up billing cycles window.
4. Select the Printing Options
5. (optional) Override the Run Date.
6. (optional) Override the Effective Date.
7. (optional) Select the Additional Options.
8. Click Run to process the billing run.

To rebill to correct a mass dues billing

iMIS provides a Rebill feature that enables you to correct a previous mass billing. Rebill a mass run if:

- The pricing table originally used for the renewal bill run was incorrect; or
- The original dues billing did not include a line item.

For example, rebill the sample initial dues bill discussed in To run initial mass dues billings.

Note: A renewal billing can be combined with a rebilling.

1. Correct the reason for the rebill.
   - If you need to add a product to the Billing Cycle, see Creating billing cycles.
   - If you need to change the pricing of a product, see Setting up customer type categories for special pricing.
2. From Bill membership dues window, click New.
3. Select Rebill to change or correct a billing run generated previously.
4. Select a billing cycle to process.
5. Select the Printing Options.
6. Enter the original Run Date range in the Begin Rebill Date and End Rebill Date fields.
7. Click Run to process the billing run.

Printing Renewal Notices

Printing Renewal Notices at the same time as billing is recommended to ensure that the only items that print on the renewal notices are the items that get billed. To do this, select both the Renewals and Initial Bill options on the Process billing window on the same billing run.

If you print the initial bill separately from billing, you must perform an ad hoc search to print only the items that were last billed. See the next section, "To print Renewal Notices separately" for more information on performing an ad hoc search to verify bill date.

Note: With accrual dues, the posting and finalization of mass billing data occurs after the renewal billing step, therefore, you need to print renewal notices (Initial Bill) independently after the batch posting is complete.

When you print Renewal Notices, the following field conditions are evaluated to determine if a Renewal Notice will print for a customer:

- The Paid Thru date field on the Status tab (Name.PAID_THRU) contains a date that is earlier than the Renewed Thru field on the Financial tab (Name.Fin.RENEWED_THRU) located on the Manage customers window (from Customers, select Manage customers).
- The Status field (Name.STATUS) on the Manage customers window is not set to S (Suspended), I (Inactive), or D (Marked for deletion).
- The balance for the dues product (Subscriptions.BALANCE) is greater than zero.
- Subscriptions.REMINDER_COUNT is equal to zero.

To print Renewal Notices Separately

When you print Renewal Notices separately from billing, you must perform an ad hoc search so that you don't print duplicate notices.

When you print an initial bill, the system looks for records with REMINDER_COUNT = 0 (renewal hasn't been printed). It is possible, however, that a record has a REMINDER_COUNT = 0 and you may not want to print the Renewal Notice, as in the following examples:

- You generate a billing run by selecting the Rebill option on the Set up general options window. In this case the REMINDER_COUNT is reset to zero.
- You manually print an individual Renewal Notice by clicking Create Invoice from the Billing tab. In this case, REMINDER_COUNT never increments.

1. From Bill membership dues window, click New.

Note: Do not select either option in the Billing Options area.

2. Select a billing cycle from Select a Cycle to Process.
3. (optional) Override the Run Date.
4. Select Initial Bill under Printing Options.
5. Select Ad Hoc Search under Additional Options.
6. Click Run. The Select Search Instructions window opens.
7. Click New to display the Search Instructions window.
8. Enter a Search Name.
9. Enter the new search instructions.

   Note: Press Ctrl + Z to expand the Comparison Value field.
10. Click Save on the Search Instructions window.
11. Click OK on the Select Search Instructions window.

    Note: If you print Renewal Notices to the screen prior to sending them to the printer, they may not be aligned exactly as they appear on the screen. To achieve the correct formatting, always print reports directly to the printer rather than from the screen.

Customizing the Renewal Notice Formats

A variety of standard renewal notice options are available. Although the presentation of most billing-related data is predetermined, many aspects can be customized.

For many of the available formats, the enlarged, bold title that appears at the top of the notice is user-defined within the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders). You can also define a limited size (notice-specific) text area.

In addition to the Billing and Reminder Notice title and text options, you can customize other aspects of the renewal notice by entering instructions on the Report Specifications window (select Utilities> Report Specs).

Note: If changes are made on the Report Specifications window, you must make the changes on a cloned copy of the standard report. This step is required to make the changes permanent.

The types of changes that can be made on the Report Specifications window include the following:

- The entry of larger user-defined text areas
- The addition of merge fields from the customer/subscriber-specific data. Up to five merge fields can be included in the overlay text

  Note: There is no provision for merge fields in the Billing and Reminder Notices text.
- The modification or addition of a few available printing options that affect the output
- The modification of top and/or left margins, which may be required to align the printed output with an iMIS-authorized preprinted form.

  Note: Crystal Report parameters should not be deleted from a report as the majority of them are necessary to run the report. The preferred method for building reports is to clone your existing report specifications, which automatically copies the report parameters.

To generate a custom Renewal Notice

To enter user-defined overlay text, you may need to customize a renewal format to print merge fields from a customer's demographic data or to modify or add an available printing option. User-defined text that exceeds 255 alphanumeric characters must be specified here.

Follow these steps to generate a custom Renewal Notice for your organization:

1. Select Utilities > Report Specs.

   The Report Specifications window opens.
2. Select the Dues Renewal Notice to customize.

Note: If you are cloning one of the DUES-Renewal Notices-Std. Form ASI-### reports, you may need to adjust the top and left margins to print the renewal notice correctly on your printer. To change the margins, select Options> Margins.

3. Click Clone.
4. Tab to the Title field and enter a unique name.
5. Click Parameters.

   The Detail Report Parameters window displays the current parameters for the report you cloned.

6. Tab to the Options field and add or remove available options. Available options vary from format to format. The two primary renewal notice options include the following:

- SUPPRESS_ZERO_ITEMS - Suppresses printing line items that have been paid off or that have a zero balance. This option suppresses individual zero balance line items when the grand total of the renewal notice is nonzero.
- PRINT_CHECKBOX - Displays checkboxes on the renewal form stub in which a customer/subscriber can choose items to pay (an optional addition that is not part of the standard option set).

7. Tab to the Parameters field and enter the text to be printed on the renewal notices. To print your organization's name and address, enter the name and address in the Parameters field. The organization name and address will not automatically print as they do on some invoices and bills from other iMIS modules.

   The entered text overlays the standard report elements. Therefore, add hard returns (by pressing Enter) to shift text down the page far enough to avoid the preset report elements on the form.

   In the following example, three additional merge fields [Temp.Item1], [Temp.Item2], and [Temp.Item3] have been included in the overlay text. Use the following instructions to define merge fields.

   Example of parameters changed on customized renewal format

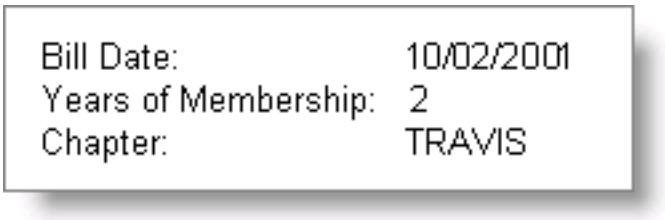
1. Click Options and select Additional Fields to open the Additional Fields window.
2. Enter a formula or field name that corresponds to the merge fields entered in the Parameters field on the Detail Report Parameters window. Tab to each Field Name row and continue entering the data that will be merged with the overlay text entered in the Parameters field. A field can reference data contained in the Name, Name_Fin, Subscriptions.BILL_DATE, or any user-defined table. You can enter up to five additional fields in the notice by selecting Options> Additional Fields. Field names must be entered in the Filename.FIELDNAME format. For example, Name.INFORMAL brings in the informal nickname from the Name file.

   Note: The formula or field name entered in the first row must correspond to the [Temp.Item1] overlay text entered in the Parameters field on the Detail Report Parameters window.

   Note: All calculations must be prefixed with @# where # represents the number of the field (1-5). Field names do not need to be prefixed.

   Note: If you enter an SQL calculation for a field, you might be prompted: Invalid Omnis calculation: proceed anyhow? Click Yes and ignore the warning.
3. Click OK to close the Additional Fields window.
4. Click Save to close the Detail Report Parameters window.
5. Click Save to close the Report Specifications window.
6. Select the cloned report title from the Forms drop-down menu on the appropriate billing cycle.
7. Test the renewal notice.

Example of text entry area expanded. This formula calculates the years of membership.



A portion of the text entered in the Parameters area with merge data from the resulting renewal notice.

To add user-defined text to the Dues Renewal Notice

The Dues Renewal Notice is a standard laser printer renewal notice format that prints the line items in the upper right corner and at the bottom in the remittance stub area. The middle of the renewal format is reserved for user-defined text.

1. Select Utilities > Reports Specs to display the Report Specifications window.
2. Clone the format.
3. Click Parameters.

   The Detail Report Parameters window opens. User-defined text can be entered in the Parameters field.

   Note: The title, Renewal Notice, cannot be changed. Billing and reminder notices text, entered in the Set up billing cycles window, is ignored with this renewal notice format.

Note: The standard options set in the Options field of the Detail Report Parameters window includes SUPPRESS_ZERO_ITEMS, but PRINT_CHECKBOX is an optional setting that is not included in the standard options set.

To add user-defined text to the Dues Renewal Notice - List Bill

The Dues Renewal Notice - List Bill is a plain-paper laser printer format designed for printing list bills in which the line items for multiple individuals or branches are all listed and totaled on one continuous bill to the BT_ID (bill to ID) or main company. This format may be used when individual or branch billing is billed to the parent company or for agency subscription billings.

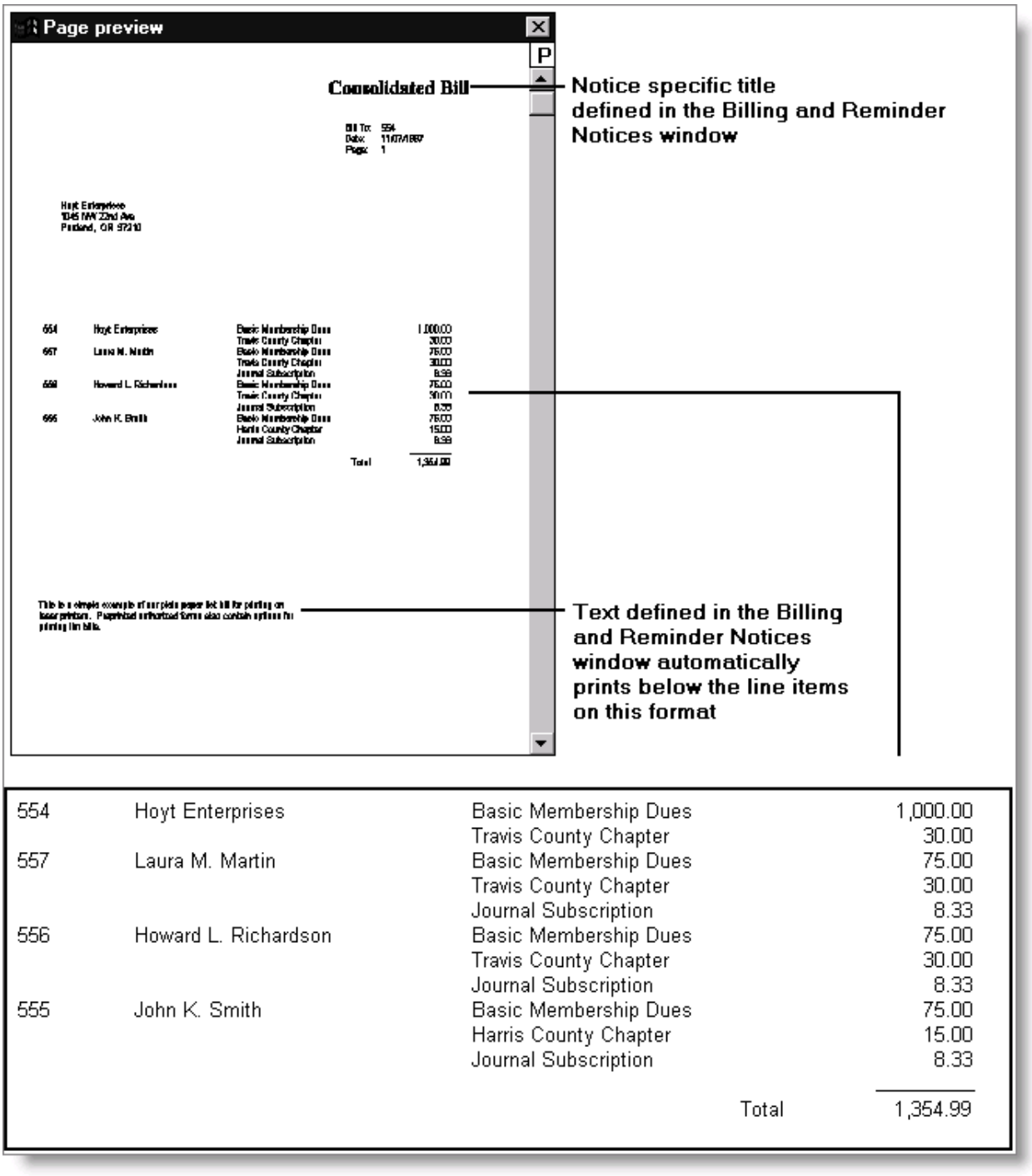
1. Select Utilities > Reports Specs to display the Report Specifications window.
2. Clone the format.
3. Click Parameters.

   The Detail Report Parameters window opens so that user-defined text can be entered in the Parameters field.

   Billing and reminder notices text is formatted to print immediately below the last line item printed. The bolded title prints in the upper right corner.

   The following illustration shows a simple list bill example where the billing line items for the main company, as well as for the individual customers who work for that company, appear on a single combined bill addressed to the company. In a combination bill like this, the line items that belong directly to the billed company will sort to the top of the list, as shown in the example.

   Note: The standard options set in the Options field of the Detail Report Parameters window are SUPPRESS_ZERO_ITEMS and SUPPRESS_CHECKBOX.

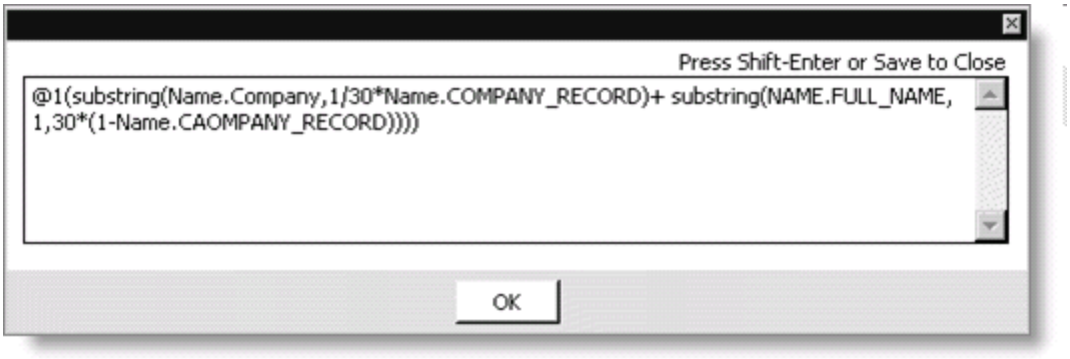


Expanded view of customers and products billed with a Dues Renewal Notice List Bill

The first Additional Fields area, which can be modified, controls the printing of the individual or branch name. The default is set to print the full name for an individual or the company name for a branch.

Note: You can access the Additional Fields window by selecting Utilities> Reports Specs, cloning the format, clicking Parameters, and selecting Additional Fields from the Options drop-down menu.

This default formula is designed to print the company name if the customer or subscriber is a company. If the customer is an individual, the individual's full name prints.



Expanded view of the additional fields area

The following is an example of how to modify the above formula to add the city next to the customer's name.

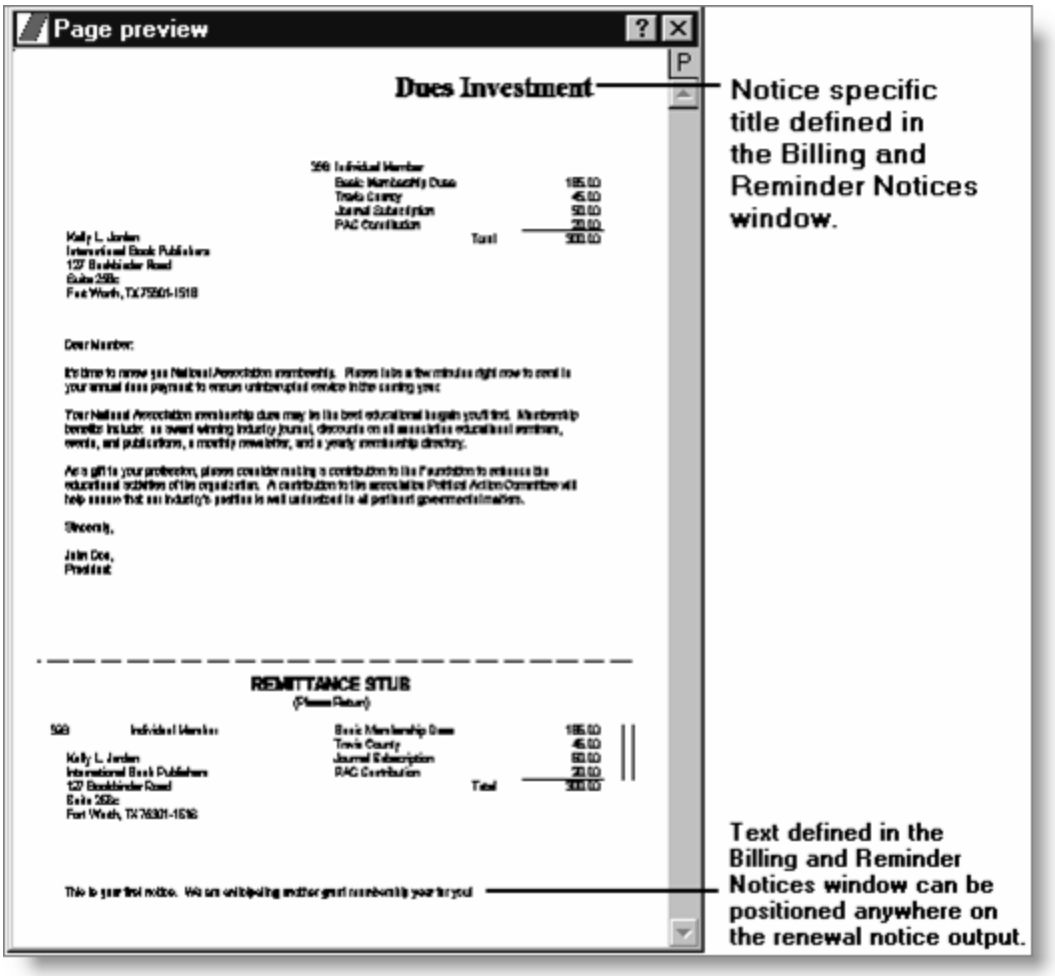
Example of the Dues Renewal Notice with Reminder Text

This format is identical to the Dues Renewal Notice format, except that it uses the Title and Text entered on the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders). You can define

the bold title and reminder text by selecting Utilities> Report Specs, and clicking Parameters.

Fundraising items are flagged (**) and the report includes a note that specifies how much of dues subscriptions are donation, and how much is taxable or receiptable. The report also includes Total FR Donations.

Note: The standard options set in the Options field of the Detail Report Parameters window are SUPPRESS_ZERO_ITEMS and PRINT_CHECKBOX.

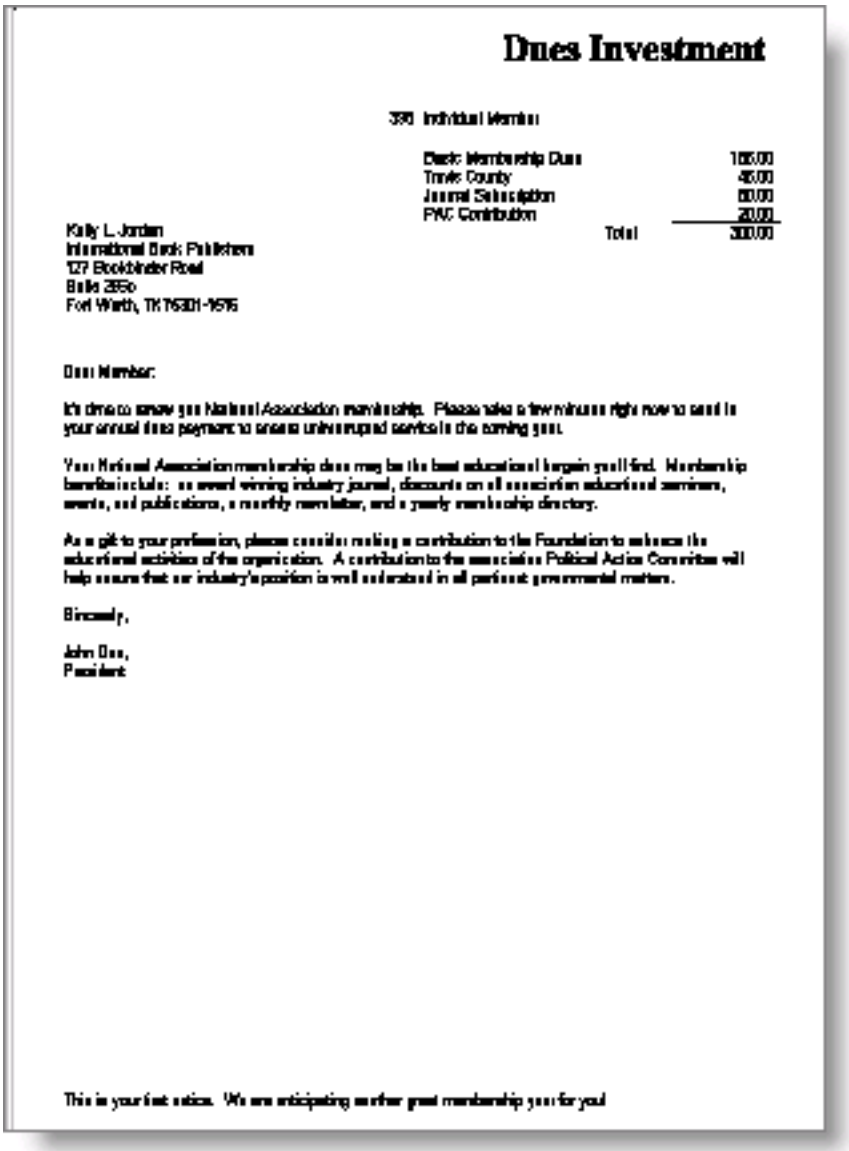


Dues Renewal Notice with reminder text

Example of the Dues Renewal Notice - No Remittance Stub

The printing and customizing options in this example are identical to the Dues Renewal Notice with Reminder Text, but a remittance stub area is not printed.

Note: The standard option set in the Options field of the Detail Report Parameters window is SUPPRESS_ZERO_ITEMS.



Dues Investment

395 Individual Member

Basic Membership Dues	195.00
Travis County	45.00
Journal Subscription	60.00
PAC Contribution	20.00
Total	320.00

Kelly L. Jordan
International Book Publishers
127 Blackbinder Road
Suite 2950
Fort Worth, TX 76301-1575

Dear Member:

It's time to renew your National Association membership. Please take a few minutes right now to send in your annual dues payment to ensure uninterrupted service in the coming year.

Your National Association membership dues may be the best educational bargain you'll find. Membership benefits include: an award winning industry journal, discounts on all association educational seminars, events, and publications, a monthly newsletter, and a yearly membership directory.

As a gift to your profession, please consider making a contribution to the Foundation to enhance the educational activities of the organization. A contribution to the association Political Action Committee will help ensure that our industry's position is well understood in all pertinent governmental matters.

Sincerely,

John Doe,
President

This is your last notice. We are anticipating another great membership year for you!

Dues Renewal Notice - no remittance stub

iMIS-authorized Renewal Notice formats

The iMIS-authorized Dues Renewal Notice form allows you to generate renewal notices on either dot matrix (continuous) or laser printers. Several of the Standard Renewal Notice formats are designed to print on forms provided in the Authorized Forms Catalog included with iMIS. The Authorized Forms Catalog is a joint effort by ASI and Versient.

In the iMIS Authorized Forms Catalog, there are six preprinted forms (four laser and two continuous) available for printing Billing renewal notices.

Note: For forms that include the credit card payment box (ASI-016, ASI-018, ASI-020-C), you must enter your list of available credit card choices in the Credit Card Types field on the AR/Cash Set up module window.

On certain preprinted forms, there may be optional choices for the iMIS report output (for example, the placement of the line items may be different, or one form could be used for a standard renewal notice or a list bill). The variations of all possible forms and iMIS output choices are represented in the following list of iMIS standard reports:

Std. Form ASI-016 - Line Items at Top	A laser-printer format that includes a bottom stub for payment and a credit card payment box. Line items are printed in the upper, right corner of the form. Clone the report specification entry to enter user text. Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Overlay text prints in the middle shaded area of the form. Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD
Std. Form ASI-016 - Line Items in	A laser-printer format that includes a bottom stub for payment and a credit card payment box. Line items are printed in the middle shaded area of the form. Clone the report specification entry to enter user text. Enter overlay text in the

Middle	Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Overlay text prints on the left half of the middle shaded area of the form (for example, to the left of the line items). Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD
Std. Form ASI-017 - Line Items at Top	Identical in form and output to Std. Form ASI-016 except line items are printed at the top of the form and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS
Std. Form ASI-017 - Line Items in Middle	Identical in form and output to Std. Form ASI-016 except line items are printed in the middle of the form and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS
Std. Form ASI-018 - Dbl Column List Bill	A laser-printer list-bill format designed to print a consolidated list of line items for multiple individuals and/or branches whose line items are to be billed to a single parent company or other Bill_To_ID. This particular format is designed with a tear-off stub along the right side of the form, which also contains a credit card payment box. Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Text entered in the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders) is formatted to print immediately below the last line item printed, to the left of the tear-off stub. The first Additional Fields area, which can be modified, controls the printing of

	the individual or branch name. The default is set to print the full name for an individual or the company name for a branch. Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD Optional add on: PRINT_CHECKBOX
Std. Form ASI-019 - Dbl Column List Bill	Identical in form and output to Std. Form ASI-018 except it includes a double-column list bill and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS Optional add on: PRINT_CHECKBOX
Std. Form ASI-020-C - Full Page List Bill	A continuous-format (dot-matrix) form designed for printing list bills in which the line items for multiple individuals/branches are all listed and totaled on one continuous bill to the Bill_To_ID or main company. This list bill, with no stub on the right, provides full-page width to list the individual/branch names and line items. This form also contains a credit card payment box. Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Text entered in the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders) is formatted to print immediately below the line items and totals. The first Additional Fields area, which can be modified, controls the printing of the individual or branch name. The default is set to print the full name for an individual or the company name for a branch. Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD
Std. Form ASI-020-	A continuous-format (dot matrix) form with line items listed in the body of the form (traditional invoice format).

C - Full Page Standard	Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD Optional add on: DUESDAT appends the printing of the renewal period onto the end of the line item description for any billing type product lines. (For example, FOR 01/01/1999 THRU 12/31/1999.)
Std. Form ASI-021-C - Full Page List Bill	Identical in form and output to Std. Form ASI-020-C. Includes a full-page list bill. The credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS
Std. Form ASI-021-C - Full Page Standard	Identical in form and output to Std. Form ASI-020-C except it includes a full-page standard billing and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS

Sample Billing reports

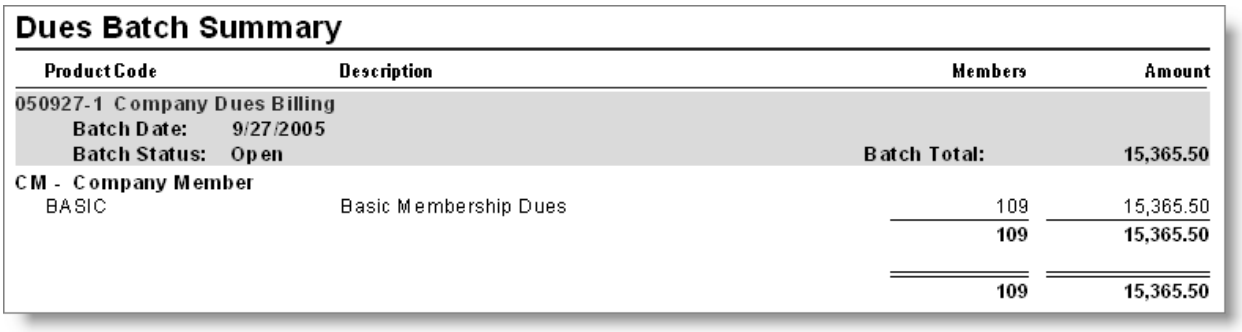
Dues Batch Summary report (Crystal)

The Dues Batch Summary report lists batches that contain Accrual Dues product transactions. The report is grouped by Batch Number, Member Type, and Product Code. Run this report from:

Run this report from: Billing > Process Accrual Dues > Post Batches > click Print Summary

Note: This report includes the following Product Types: DUES, CHAPT, SEC, SUB, VOL, MISC.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Dues Batch Summary

Product Code	Description	Members	Amount
050927-1 Company Dues Billing			
Batch Date: 9/27/2005			
Batch Status: Open		Batch Total:	15,365.50
CM - Company Member			
BASIC	Basic Membership Dues	109	15,365.50
		109	15,365.50
		109	15,365.50

Dues Batch Report (Combined) report

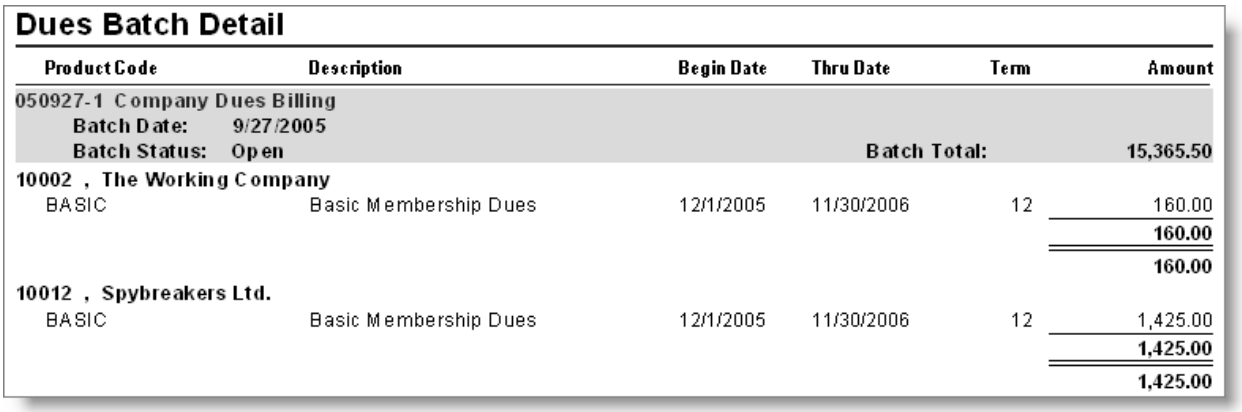
The Dues Batch Report (Combined) is a combination of the Dues Batch Summary and the Dues Batch Detail reports.

Dues Batch Detail report (Crystal)

The Dues Batch Detail report lists batches that contain Dues product transactions. The report is grouped by Batch_Num and by Bill To ID.

Note: This report includes the following Product Types: DUES, CHAPT, SEC, SUB, VOL, MISC.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.

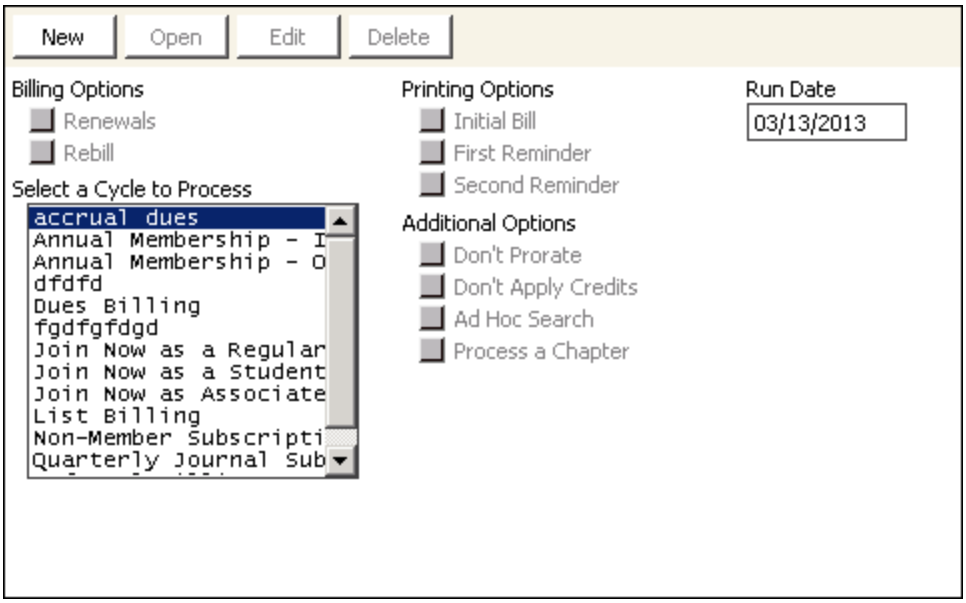


Dues Batch Detail

Product Code	Description	Begin Date	Thru Date	Term	Amount
050927-1 Company Dues Billing					
Batch Date: 9/27/2005					
Batch Status: Open			Batch Total:		15,365.50
10002 , The Working Company					
BASIC	Basic Membership Dues	12/1/2005	11/30/2006	12	160.00
					160.00
					160.00
10012 , Spybreakers Ltd.					
BASIC	Basic Membership Dues	12/1/2005	11/30/2006	12	1,425.00
					1,425.00
					1,425.00

Dues Batch Detail

Bill membership dues window



Admin Console: Home > Membership and Dues > Bill membership dues
Desktop: Billing > Process billing

Billing Options

Use the options in this section to specify the type of billing process to run.

Renewals – Select this option to generate new billing data for customers who match the billing cycle parameters. When this option is selected, the Effective Date field displays.

Rebill – Select this option to generate an invoice to correct a billing run generated previously. The Rebill option recalculates the billing data only if it finds a customer who was originally billed within the Begin Rebill Date and End Rebill Date range.

Note: Both the Renewals and Rebill options can be selected to bill other renewal candidates who fit the cycle and Effective Date criteria and who did not get billed earlier (for example, if an earlier bill run was canceled).

Printing Options

Use this section to indicate which notices are to be printed.

Initial Bill – Selecting this option prints an invoice when a customer's Paid Thru date expires before the Effective Date and the customer has not been billed previously for the term currently being billed. Select Initial Bill to print Renewal Notices for those customers whose billing dates are generated through the Billing Options selection.

First Reminder –When selected, this option displays the 1st Reminder Start and 1st Reminder End date fields. This option prints a first reminder for those customers whose Initial Bill was run between the 1st Reminder Start and 1st Reminder End dates and who are currently not paid.

Second Reminder –When selected, this option displays the 2nd Reminder Start and 2nd Reminder End date fields. This option prints a second reminder for those customers who were sent first reminders between the 2nd Reminder Start and 2nd Reminder End dates and who are currently not paid.

A reminder will be printed if the following criteria are met:

- The original run date falls within the reminder Start and End date range, inclusive,
- There is still at least one non-voluntary line item open, and
- The Paid Thru date has not been advanced.

Run Date

(Defaults to the current system date) Specifies when the billing run is processed. This date can be overwritten.

Effective Date

Specifies the first date of the new customer term for individuals to be included in the billing cycle. The Effective Date is a very important factor in determining who gets billed.

All customers who meet the other selection criteria and have a Paid Thru date before the Effective Date will be billed if a renewal has not already been generated. For example, if you enter 9/1/2001 in the Effective Date field, iMIS will bill renewals to individuals who have a Paid Thru date of 8/31/2001 or earlier and have not been billed previously.

For anniversary billing cycles, the Effective Date is calculated based on the Initial Bill Cut Off parameters set on the Billing and Reminder Notices window (from Configure, select Billing > Set up billing cycles, select Bills/Reminders).

For annual billing cycles, the Effective Date is set to the first day of the current fiscal year based on the First Month of Fiscal Year field set on the Accounting Configure accounting options window (from Accounting, select Options > Configure accounting options).

Caution! If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

Select a Cycle to Process

This section contains a list of billing cycles created on the Set up billing cycles window. To define a new billing cycle, see Creating Billing Cycles.

Additional Options

Use this section to specify additional billing options.

Don't Prorate – Enable this checkbox to override prorating options set on the Set up general options window (from Configure, select Billing > Configure billing options) or the Set up products window (from Configure, select Billing > Set up billing products). This option bills full-term amounts in all cases.

Don't Apply Credits – Enable this checkbox if you do not want to apply any outstanding AVAIL_CREDIT credit amounts to the renewal calculation run.

Ad Hoc Search – Enable this checkbox to generate additional restriction of the billing cycle based on the Name table.

Process a Chapter – Enable this checkbox to allow the selection of a specific chapter for dues product billing run. If a chapter is selected, only those records selected in the billing cycle whose main chapter code matches the selected chapter will be billed.

Begin Rebill Date

Use to indicate the beginning date of a billing run to correct a billing run previously processed.

End Rebill Date

Use to indicate the ending date of a billing run to correct a billing run previously processed.

Reminder Start

Default date is based on the First Reminder Start parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Reminder End

Default date is based on the First Reminder Cut Off parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Reminder Start

Default date is based on the Second Reminder Start parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Reminder End

Default date is based on the Second Reminder Cut Off parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Run button

Used to generate and print invoices to your report destination (select File> Report Destination).

Manage expired members

An important maintenance step is dealing with member status and type of those who fail to renew. If member statuses or types are not changed, they may retain unwarranted access to organizational privileges, and you won't have current records on the overall status of your members. From the Manage expired members window you can process expired memberships throughout your database.

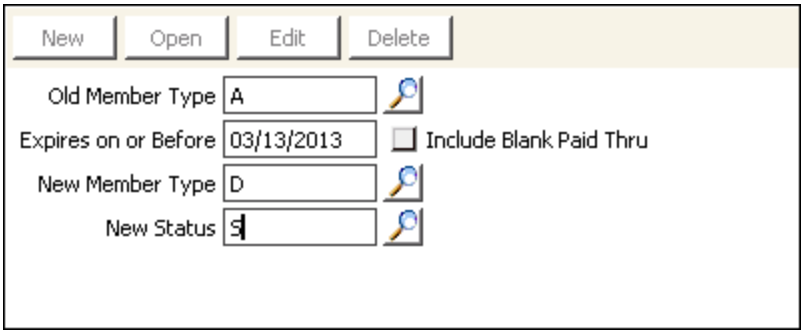
Note that this method makes use of the Paid Thru date in the member's record to perform the status and/or member type conversion. Most users will be set up with cash-based accounting (in Billing system setup), so this utility will work fine. If, however, you are set up for accrual-based accounting, and the Paid Thru dates are updated automatically at each billing, you'll have to convert expired member' statuses by hand, as needed because in some cases accrual updated Paid Thru at payment time.

To modify a member type or status

Note: Perform the following procedure for a single member type you want to modify. If you have more than one member type to modify, perform the procedure as many times as necessary.

1. From Manage expired members window, click Edit.
2. Enter the member type you want to modify in the Old Member Type field or click the lookup icon to select a value.
3. Enter the old expiration date to use as the basis of the conversion in the Expires on or Before field. The system finds all of those member types who have a Paid Thru date that matches or precedes the date you enter in this field.
4. (optional) Enable the Include Blank Paid Thru option if you want the system to find those customers from whom no payment was ever received.
5. (optional) Enter the member type you want to assign to delinquent or expired members or select the lookup icon and select a value. You can retain the existing member type designations and simply change their status. To retain the member type, leave the New Member Type field blank.
6. (optional) Enter the New Status or select the lookup icon to select a value. To retain the status, delete the default status of S (Suspended).
7. Click OK.

Manage expired members window



Admin Console: Home > Membership and Dues > Manage expired members
Desktop: Billing > Manage expired members

Old Member Type

Enter an existing member type that you want to convert or select the lookup icon to select a value.

Expires on or Before

Enter the customer's Paid Thru date.

Include Blank Paid Thru

Check this field if you want the system to find those customers from whom no payment was ever received (resulting in a blank Paid Thru field).

Note: Selecting the Include Blank Paid Thru option may include your newly joined as well as your delinquent customers.

New Member Type

Enter the non-customer type that you want to assign to delinquent or expired customers or select the lookup icon and select a value. You can retain the existing member type designations and simply change their status. To retain the member type, leave the New Member Type field blank.

New Status

(Defaults to S, for Suspended) Enter a status or select the lookup icon to select a value.

Manage accrual dues

The Process accrual dues task item displays only if Accrual is enabled as the default accounting method on the Set up general options window (Configure, select Billing > Configure billing options).

Using the accrual method for managing your dues products, you can book income or deferred income, and create open accounts receivable items whenever you generate bills. The accrual dues method provides the following:

- Creation of unposted transaction records – Option to review, reject, and rerun billing results prior to batch posting
- Two accrual basis dues billing run reports – Dues Batch Summary and Dues Batch Detail reports
- AR Payment Application option – Distribute partial payments by priority or proportionally
- Paid Thru Date Update option – Update Paid Thru date when the invoice is paid in full or at billing time
- Cash/Accrual Option at the Billing Cycle level – Process a mixture of accrual- and cash-based billings

Generating a mass accrual dues billing

When an accrual method billing cycle is selected, certain areas of the Process billing window may be disabled or grayed out. For example, the rebill and available credit options are not allowed for accrual dues items.

Note: A new batch will be generated for each mass dues billing run even if you do not have Batch Control enabled on the AR/Cash Batch Control window.

To generate a mass accrual dues billing

8. From Home, select Membership and Dues > Bill membership dues.
9. Click New.
10. Select the Renewals option.

Note: The Rebill option is not allowed for accrual dues items. Adjustments must be made using debits or credits (see Processing Adjustments).

Note: Printing of renewal notices under accrual dues is not allowed with the generation of the billing. You must post the batch and then print the renewal notices separately (see Printing Renewal Notices).

11. (optional) Override the Run Date.
12. Select an accrual billing cycle.
13. (optional) Override the Effective Date.
14. (optional) Select any Additional Options.

    Note: The AVAIL_CREDIT feature is currently not supported by accrual dues cycles. All accrual dues cycles will operate as if the Don't Apply Credits option on the Process billing window is enabled.

15. Click Run to process the billing run.

    Note: A new batch will be generated for each mass dues billing run even if you do not have Batch Control enabled on the AR/Cash Batch Control window. If you have selected Operator Assigned Batch Numbers, iMIS will prompt you for a batch number (maximum of ten characters) when the billing process is started. Otherwise, the system will assign a batch number automatically according to the selection made for batch numbering on the AR/Cash Batch Control window.

Posting mass accrual dues batches

After you have generated a mass accrual dues billing, review and post the batch. The Post batches window allows you to review, post, or cancel individual batches prior to posting the batches to the Transaction table.

To print an accrual dues batch

Before posting an accrual dues batch, click Print Summary or Print Detail to review the results of the accrual dues billing run.

1. From Home, select Membership and Dues > Manage accrual dues.

2. Select the batch to be printed.
3. Select File > Report Destination and select the print destination.
4. Click Print Summary to print the Dues Batch Summary Report, or click Print Detail to print the Dues Batch Detail Report.

   The Dues Batch Summary Report summarizes the transaction records for each customer type. It provides subtotals for the number of records and amounts for each product code for that customer type. It also provides a subtotal for each customer type and a grand total for the accrual dues billing run at the end of the report.

   For each customer billed, the Dues Batch Detail Report lists the line items billed (including term dates and amounts) with a subtotal by ID. On a list bill, you can use the Bill to ID to further group and subtotal the details for multiple customers.

   To post a mass accrual dues batch

   If the billing transaction data is accurate, you can finalize the transaction by posting the batch.

1. From Home, select Membership and Dues > Manage accrual dues.
2. To post a single batch, select the batch you want to post and click Post Selected.
3. To post multiple batches, double-click each open batch to mark it as ready, select the Ready option to view the ready list, and click Post Ready.

   iMIS processes the batch and prints the Dues Batch Detail Report and the Batch Posting Listing report. The batch status changes to Posted.

   To delete an unposted batch

   If any of the billing transactions are incorrect (such as wrong customers or line items billed, or incorrect term dates or amounts), simply delete the billing results; correct the causes of the errors, and run the billing process again.

   Note: You must delete an unposted batch if you want to rerun the billing cycle.

1. From Home, select Membership and Dues > Manage accrual dues.

2. Select the batch you want to delete.
3. Click Delete. A message is displayed asking you to confirm the deletion.
4. Click Yes to delete the batch.

Enter and edit accrual dues credit memos

Use credit memos to perform the following tasks:

- Write off an open item that cannot be collected
- Reduce or reverse a line item charge
- Reverse a previously entered transaction
- Record product returns and credit the customer

You can process reversals of open accrual dues items on a line-by-line basis on the Enter and edit credit memos window. After the credit memo is processed, the balance reduction is reflected appropriately in the various inquiry windows.

For example, if a customer cancels a single line item on a bill and pays for the remaining items, you should reverse the charge of the canceled item.

Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the Accounting Enter and edit credit memos window, a message is displayed at the bottom of the window.

Authorization levels for credit memos

The Enter and edit credit memos window adhere to the same security rules as the Enter and edit payments window:

- To find and view an existing credit memo, you must have a Billing authorization level of one (1) or greater.
- To enter new accrual dues credit memos, you must have a Billing authorization level of three (3) or greater. A Billing authorization level of three (3) will allow you to edit or delete

credit or debit memos you have entered.

- If the View Batch by User option is enabled on the AR/Cash Batch Control window, to edit or delete another user's accrual dues credit memo, you must have a Billing authorization level of four (4) or greater.

To process an accrual dues credit memo

You can process reversals of accrual dues items on a line-by-line basis through the Enter and edit accrual dues credit memos window. For example, if a customer cancels a single line item, you can reverse that one line.

Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any income recognized for this product during the GL Interface procedure. For more information, see Using Deferred Income.

1. From Home, select Membership and Dues > Enter and edit accrual dues credit memos and click New.

   The Date field defaults to:

- Batch date if Batch Control is used.

  If Batch Control is enabled and an active open batch is not selected, the Batch Control List is displayed. Select or create a batch and click New.

  If Batch Control is enabled and an active open batch is selected, the Date field is populated with the date of the batch.

- System date, if Batch Control is not used

  If the system date is overridden, the new date becomes the default value for inserts until the window is closed and reopened.

2. Enter an ID or select the lookup icon to find a customer's record. After the ID field is populated, an address block for the customer displays at the top of the window and the fields labeled Type, Status, Paid Thru, and Category populate. The calculated address block contains a concatenation of the full name, title, company, and full address.

Note: The CATEGORY field displays prefixed with the label Category if your administrator has enabled the Use Bill Categories option. If this option is not enabled, neither the category value nor the category label will display.

3. Tab to the Invoice Number field.

- Enter the accrual billing invoice number and press Enter, or
- Select the lookup icon to select an invoice.

Invoice or reference numbers are validated for the following:

- Invoice.SOURCE_SYSTEM is equal to DUES and at least one Invoice_Lines row is linked to the invoice.
- The Invoice.BT_ID is equal to the ID entered for the credit memo.

4. After the invoice number is entered, select from the following options:

- Click Adjust All to select all line items to credit.

The balance amount displays in the Amt Adj field and the Credit option is selected for each line item.

- Select the Credit option to credit specific line items. For example, select this option for Line 2.

The balance amount displays in the Amt Adj field.

- Enter an amount to credit in a line item's Amt Adj field. For example, enter 100.00 in the Amt Adj field for Line 1.

This will automatically enable the Credit option:

5. Click Save to update the record.

The Total Adjustment field displays the total amount of the credit memo. Line items not adjusted are no longer displayed on the window.

To find an accrual dues credit memo using a transaction number

1. From Enter and edit accrual dues credit memos window.

2. Click Find or Open.
3. Enter the transaction number and press Enter.

   iMIS verifies that the transaction number is the correct type based on whether Trans.SOURCE_SYSTEM is equal to DUES and Trans.JOURNAL_TYPE is equal to CM. If the transaction number is not correct, a message is displayed informing you that the transaction could not be located.

   Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR Enter and edit credit memos window, a message is displayed at the bottom of the window. See To process an accrual dues credit memo for details.

   To find an accrual dues credit memo using a transaction date

1. From Enter and edit accrual dues credit memos window, click Find or Open.
2. Tab to the Date field and enter a valid date, for example, 04152001, and press Enter.

   iMIS builds a list of potential matches, looking for a match with that date and of the correct type (Trans.SOURCE_SYSTEM is equal to DUES and Trans.JOURNAL_TYPE is equal to CM). If no transactions are found, a message is displayed informing you that no transactions match your criteria.

   The most recent transaction to meet the criteria is displayed. If there is more than one transaction that meets the criteria, the most recent transaction is displayed and the Left arrow is activated. After viewing the previous transaction, the Right arrow is activated, allowing you to scroll through all transactions based on the date entered (Trans.SOURCE_SYSTEM equal to DUES and Trans.JOURNAL_TYPE equal to CM).

   Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR Enter and edit credit memos window, a message is displayed at the bottom of the window. See To process an accrual dues credit memo for details.

   To find an accrual dues credit memo using the customer ID

1. From Enter and edit accrual dues credit memos window, click Find or Open.
2. Tab to the ID field, enter a valid ID, and press Enter.

   iMIS will build a list of potential matches, looking for a match with that ID and of the correct type (Trans.SOURCE_SYSTEM is equal to DUES and Trans.JOURNAL_TYPE is equal to CM). If the ID is not correct, a message is displayed informing you the transaction could not be located.

   The most recent transaction to meet the criteria is displayed. If there is more than one transaction that meets the criteria, the most recent transaction is displayed and the Left arrow is activated. After you have viewed the previous transaction, the Right arrow is activated, allowing you to scroll through all valid transactions (Trans.SOURCE_SYSTEM equal to DUES and Trans.JOURNAL_TYPE equal to CM) based on the date entered.

   Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR Enter and edit credit memos window, an error displays at the bottom of the window. See To process an accrual dues credit memo for details.

   If more than one Find criteria is entered, iMIS will search on the following:

- Transaction number first, if populated, and ignore the other search criteria.
- Date second, if populated, and ignore the ID.
- ID third, if both Transaction and Date are blank.

   To edit an accrual dues credit memo with Batch Control enabled

   You can edit an accrual dues credit memo only if it has not been exported through a General Ledger interface. After this occurs, Trans.POSTED is equal to 4, and you will not be able to edit the credit memo.

1. From Enter and edit accrual dues credit memos window, find an accrual dues credit memo.
2. Click Edit.

Note: If a batch is not selected, iMIS will ensure that the batch containing the credit memo is still in an open state and then open the Batch window.

If a batch is selected, but is not the batch containing the credit memo, a message is displayed asking you to confirm loading a batch other than the one selected. Click No to cancel the edit or click Yes to proceed. Before changing the batch, iMIS will ensure that the batch is still in an open state. If the batch is not open, a message is displayed informing you that the batch is not open and cannot be edited.

3. Tab to the Amt Adj field to edit the amount.
4. Click Save.

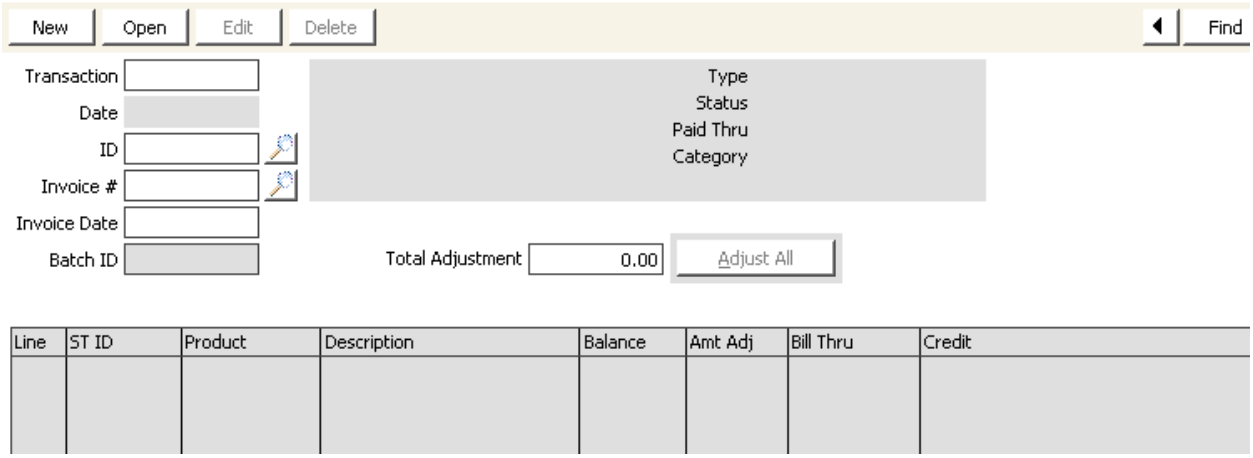
To cancel an accrual dues credit memo with Batch Control enabled

You can cancel an accrual dues credit memo only if it has not been exported through a General Ledger interface. After this occurs and the Trans.POSTED_FLAG is equal to four, you will not be able to edit the credit memo.

1. From Enter and edit accrual dues credit memos window, find an accrual dues credit memo.
2. Click Delete.

- If a batch is not selected, iMIS will ensure that the batch containing the credit memo is still in an open state, open the Batch window, and ask you to confirm the deletion. Click Yes to delete the transaction or click No to cancel the deletion.
- If a batch is selected, but is not the batch containing the credit memo, a message is displayed asking you to confirm loading a batch other than the one selected. Click Yes to proceed. Before changing the batch, iMIS will ensure that the batch is in an open state. If the batch is open, a message is displayed asking you to confirm the deletion. Click No to cancel the delete or click Yes to delete the transaction. If the batch is not open, a message is displayed informing you that the batch is not open and cannot be edited.

Enter and edit accrual dues credit memos window



Admin Console: Home > Membership and Dues > Enter and edit accrual dues credit memos
Desktop: Billing > Process accrual dues

Transaction

This field is automatically populated with the transaction number.

Date

Defaults to the current system date, or the batch date if you are using the batch control option.

ID

Specifies the billed customer identification number or. You can also select the lookup icon to select a value.

Invoice #

Specifies the invoice number assigned to the billing transaction or select the lookup icon to select a value.

Invoice Date

This field is automatically populated with the invoice date when you enter a value in the Invoice# field.

Batch ID

This field is automatically populated with the batch number of the current, open batch if batch control is enabled on the AR/Cash Batch Control window.

Original Invoice Balance

Displays the total balance due from the original billing invoice. This option displays when a record is entered.

Total Adjustment

Displays the total amount to be adjusted for the line items as you select them.

Adjusted Invoice Balance

Displays the difference between the Original Invoice Balance and Total Adjustment fields. This option is displayed when a record is entered.

Adjust All button

Used to automatically mark the credit checkbox for all line items.

Line

This column displays all the Invoice_Lines.LINE_NUM fields associated with the Invoice Number.

ST ID

This column displays all the Invoice_Lines.ST_ID fields associated with the Invoice Number.

Product

This column displays all the Invoice_Lines.PRODUCT_CODE fields associated with the Invoice Number.

Description

This column displays the description of the product code. If the invoice is a List Bill, the name of the ST_ID will be concatenated with the product title (for example, Bill Smith, Basic Dues).

Balance

This column displays all Invoice_Lines.BALANCE fields associated with the Invoice Number.

Amt Adj

This column displays the dollar amount to be adjusted from this line item. Entering an amount in this field then tabbing automatically marks the Credit checkbox.

Bill Thru

This column displays all Invoice_Lines.BILL_THRU fields associated with the Invoice Number.

Credit

Select to select a line item to be credited in full.

Enter and edit accrual dues debit memos

Use debit memos to perform the following tasks:

- Increase a line item charge
- Bring a credit balance to zero due to an overpayment, credit memo, or cancellation transaction

Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any recognized for this product during the GL Interface procedure. For more information, see Using Deferred Income.

Authorization levels for debit memos

The Enter and edit accrual dues debit memos window adhere to the same security rules as the Enter and edit payments window:

- To find and view an existing debit memo, you must have a Billing authorization level of one (1) or greater.
- To enter new accrual dues debit memos, you must have a Billing authorization level of three (3) or greater. A Billing authorization level of three (3) will allow you to edit or delete credit or debit memos you have entered.
- If the View Batch by User option is enabled on the AR/Cash Batch Control window, to edit or delete another user's accrual dues debit memo, you must have a Billing authorization level of four (4) or greater.

To process an accrual dues debit memo

You can process reversals of accrual dues items with a credit balance on a line-by-line basis through the Billing Enter and edit debit memos window. For example, if a customer overpays an invoice and you do not intend to refund the overpayment, you should process a debit memo for that amount.

Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any income recognized for this product during the GL Interface procedure. For more information, see Using Deferred Income.

1. From Home, select Membership and Dues > Enter and edit accrual dues debit memos and click New.

The Date field defaults to:

- Batch date if Batch Control is used.

If Batch Control is enabled and an active open batch is not selected, the Batch Control List is displayed. Select or create a batch and click New.

If Batch Control is enabled and an active open batch is selected, the Date field is populated with the date of the batch.

- System date, if Batch Control is not used

If the system date is overridden, the new date becomes the default value for inserts until the window is closed and reopened.

2. Press Tab and enter an ID or select the lookup icon to find a customer's record.

   After the ID field is populated, an address block for the customer displays in the upper right-hand corner and the fields labeled Type, Status, Paid Thru, and Category are populated.

   The calculated address block contains a concatenation of Name.FULL_NAME, Name.TITLE (if Use Title is enabled for the preferred mailing address type), Name.COMPANY (if Use Company is enabled for the preferred mailing address type), and Name.FULL_ADDRESS.

   Note: Name.CATEGORY displays prefixed with the label Category: as long as the Use Bill Categories option is enabled on the Customer Setup - Basic Options window. If this option is not enabled, neither the category value nor the category label will display.

3. Tab to the Invoice Number field.

- Enter the invoice number and press Enter, or
- Select the lookup icon and select an invoice:

  Invoice or reference numbers are validated for the following:

- Invoice.SOURCE_SYSTEM is equal to DUES and at least one Invoice_Lines row is linked to the invoice.
- The Invoice.BT_ID is equal to the ID entered for the credit memo.

4. After the invoice number is entered, select from the following options:

- Select Adjust All to select all line items to debit.

  The balance amount times -1 displays in the Amt Adj field and the Debit option is selected for each line item.

  Note: Adjust All is available only when the overall balance is negative.

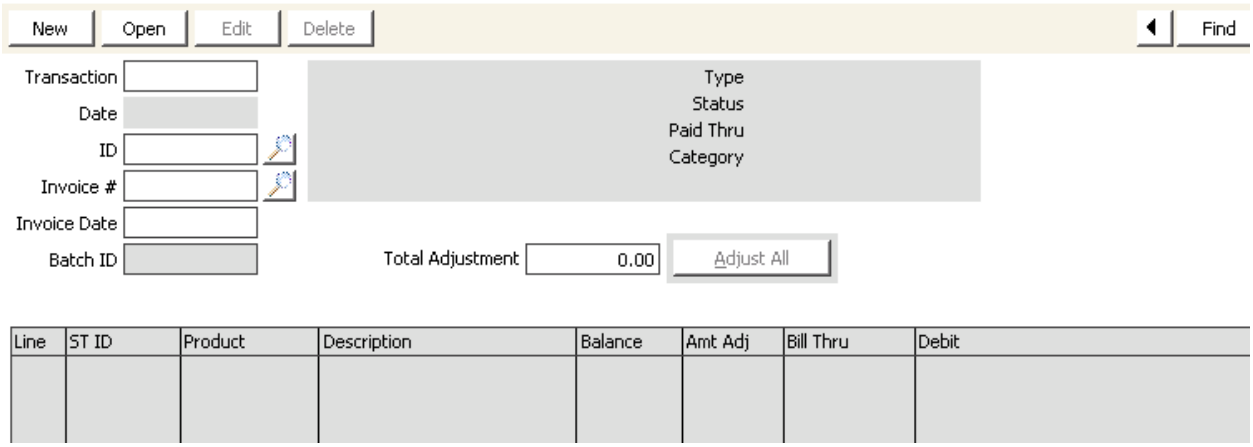
- Select the Debit option to debit specific line items.
- Enter an amount to debit in the line item's Amt Adj field.

5. Click Save to update the record.

   The Total Adjustment field displays the total amount of the debit memo and line items not adjusted are no longer displayed on the window.

   After an accrual dues debit memo is applied to an invoice, the Transaction Ledger displays the detail for each amount adjusted.

Enter and edit accrual dues debit memos window



Admin Console: Home > Membership and Dues > Enter and edit accrual dues debit memos
Desktop: Billing > Process accrual dues > Enter and edit debit memos

Transaction

This field is automatically populated with a transaction number.

Date

Defaults to the current system date, or the batch date if you are using the batch control option.

ID

Enter the customer identification number or, if a company is responsible for the payment, enter the company ID in this field. You can also select the lookup icon to select a value.

Invoice Number

Specifies the invoice number assigned to the transaction or select the lookup icon to select a value.

Invoice Date

The current date automatically displays in this field when a record is entered.

Batch ID

Displays the batch number of the current open batch if batch control is enabled on the AR/Cash Batch Control window.

Original Invoice Balance

Displays the total current balance of the original invoice.

Total Adjustment

Displays the total amount to be adjusted for the selected line items.

Adjusted Invoice Balance

Displays the Original Invoice Balance plus the Total Adjustment field. The value in the Total Adjustment field is typically a negative amount and is therefore deducted from Original Invoice Balance. If Total Adjustment is a positive amount, it is added to Original Invoice Balance.

Adjust All

Used to automatically debit all line items. This button can be used if the overall balance is negative.

Line

This column displays all Invoice_Lines.LINE_NUM fields associated with the Invoice Number.

ST ID

This column displays all the Invoice_Lines.ST_ID fields associated with the Invoice Number.

Product

This column displays all the Invoice_Lines.PRODUCT_CODE fields associated with the Invoice Number.

Description

This column displays the description of the product code. If the invoice is a List Bill the name of the ST_ID will be concatenated with the product title, for example, Bill Smith, Basic Dues.

Balance

This column displays all Invoice_Lines.BALANCE fields associated with the Invoice Number.

Amt Adj

This column displays the dollar amount to be adjusted from the specified line item. Entering an amount in this field automatically enables the Debit option.

Bill Thru

This column displays all Invoice_Lines.BILL_THRU fields associated with the Invoice Number

Debit

Select to have the line item debited.

Events

Register for an event

Processing an event registration involves entering registrant information, selecting the event function(s), making payments, and generating reports.

To enter an event registration

1. From Register for an event window, click New.
2. Enter an Event code or use the lookup icon to look up an event code.
3. Enter the registrant's ID (use the lookup icon to look up an ID). The registrant's name and address information will be shown on the Register a customer window.

   If the registrant does not have a record in the database, click Add to open the Attendee tab and enter the registrant's information:

- (required) Enter the registrant's First and Last name.
- (Required if adding a new customer to the database) Enable the Add to Master option to create an ID for the customer and add the customer record to the database.
- (Recommended) Enter additional information to complete the customer's record including company, address, and phone information.
- Select the Overview tab.

4. (optional) Enter the Date. The date defaults to the batch date if Batch Control is used; otherwise, the date defaults to the current system date.
5. (optional) Enter the Source Code for the registration.
6. (optional) Override the Class code, if necessary.
7. (optional) Enter the Payment Summary information:

- Enter a Purchase Order number if there is one.
- Enter the Bill To ID if it is different from the registrant's ID (use the lookup icon to look up an ID).

8. Register for event functions:

- Double-click on a function title in the list of functions.
- The function title is shown in the Function box.
- Enter the number of registrants in the Qty field.

The registration price is shown in the Price box.

- (optional) Override the function price if necessary by typing in a new price.
- Repeat for each event function the registrant wants.

9. Click Save.

To enter an event registration for multiple customers

Organizations often need to register multiple customers for the same event. Using iMIS Events, you can simultaneously register multiple customers for an event rather than registering each customer separately.

1. From Register for an event window, click New.
2. Enter an Event code or click the lookup icon and select an event code.
3. Click the lookup icon located to the right of the ID field to display the Find window.
4. Perform a search in the Find window. If the search returns two or more results, the Register Result List button is enabled.

   Note: The current system date is used, so if Current Committee is selected and a search is performed on a committee, only the current committee members are displayed in the search results.

5. To register all of the IDs returned by the search, click Register Result List.
6. A confirmation message displays. Click Yes. A message displays indicating that the event registrations are being processed.

   Note: If an ID is already registered for the event, the ID is skipped and event registration processing continues with the next ID.

   After the event registration processing for the IDs is complete, the Find window closes. A message is displayed indicating the number of successful registrations and the number of IDs which were already registered for the event. When you click OK, a message indicating the number of event registrations processed displays at the bottom of the Overview

tab on the Register a customer window. All of the IDs that were just registered are loaded in the transaction list so that you can use the Previous and Next buttons to view the event registrations on the Overview tab.

Finding an event registration

In the Events module you can find an event registration by using the Meeting Find window or by using the Find window.

To find event registrations using the Meeting Find window

1. From Register for an event window, click Open or Find.
2. Select the Event field lookup icon to open the Meeting Find window.
3. Make a selection from the list of Search Types.
4. Enter the search criteria in the search field at the bottom of the window. Click Find on the Meeting Find window to display a list of events matching the search criteria.
5. Select the event, and click Find on the Meeting Find window.
6. Enter a registrant's ID, or select the ID field lookup icon to open the Find window and find a registrant.

To find event registrants using the Find window

1. From Register for an event window, click Open or Find.
2. Enter an Event code, and Tab to the ID field.
3. Select the ID field lookup icon to open the Find window.
4. Make a selection from the list of Search Types.
5. Enter the search criteria in the Search field at the bottom of the window.
6. Click OK on the Find window to display a list of registrants matching the search criteria.
7. Select the desired registrant.

8. Click OK on the Find window to display the registration in the Register a customer window.

Editing an event registration

Managing events includes editing registrations. For example, a registrant may decide to change event functions or bring a guest to some or all of the functions.

The automatic re-pricing feature of iMIS is unique in that when the registrant class or the registration date is changed, the pricing for that particular registration will change respectively. For example, if early and regular registration cutoff dates are defined for an event, and the function being registered for also has early, regular, and late pricing, iMIS will automatically re-price the function based on the date and established pricing when the event registration date is updated.

To add a function to an existing event registration

1. From Register for an event window, click Open or Find.
2. Enter the Event code, or select the Event field lookup icon to search for an event.
3. Enter the registrant's ID, or select the ID field lookup icon to search for a registrant.
4. Click Edit.
5. Select the event function you want to add.
6. Enter the quantity for the function in the Qty field.
7. Click Save.

   The total price and balance is updated.

To delete a function from an event registration

1. From Register for an event window, click Open or Find.
2. Enter the Event code, or select the Event field lookup icon to search for an event.
3. Enter the registrant's ID, or select the ID field lookup icon to search for a registrant.
4. Click Edit.

5. Double-click the function to delete it from the event registration.
6. Click Save.

   The total price and balance is updated.

   To edit the Bill To information

   During initial registration, the Bill To ID can be changed. For example, a company or third party may be responsible for paying a registrant's event fees. After a registration is saved, use the following steps to edit the Bill To ID.

1. From Register for an event window, click Open or Find.
2. Enter the Event code, or select the Event field lookup icon to search for an event.
3. Enter the registrant's ID, or select the ID field lookup icon to search for a registrant.
4. Click Transfer/Substitute.
5. Tab to the Bill To field.
6. Enter the new Bill To ID, or select the Bill To field lookup icon to search for the new ID.
7. Click Save.

   Note: The registration order remains unchanged when the Bill To ID is changed. (The registration order will not be canceled and re-entered because the registrant does not change.) All charges and payments will be reversed appropriately from the original Bill To ID's invoice item and transferred to the new Bill To ID.

Canceling an event registration

If you must cancel an event registration for which fees already have been paid, all charges are reversed and the payment becomes an open credit in AR/Cash. When this happens, you can apply the money to other open items, such as an order or a billing payment, or you may issue a refund through AR/Cash.

Within the Events module, the procedure for canceling a registration is the same regardless of whether or not a payment has been received.

Consider the following when canceling a registrant's event order:

- Are you canceling a registration with no cancellation fees? If so, iMIS automatically reverses the charges.
- Are you charging a cancellation fee? If you are, you should have defined a cancellation fee function when defining your event functions.

To cancel an event registration with no cancellation fee

1. From Register for an event window, click Open or Find.
2. Find the registration (see "Finding an event registration") to cancel.
3. Click Delete.

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

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

To cancel an event registration with a cancellation fee

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

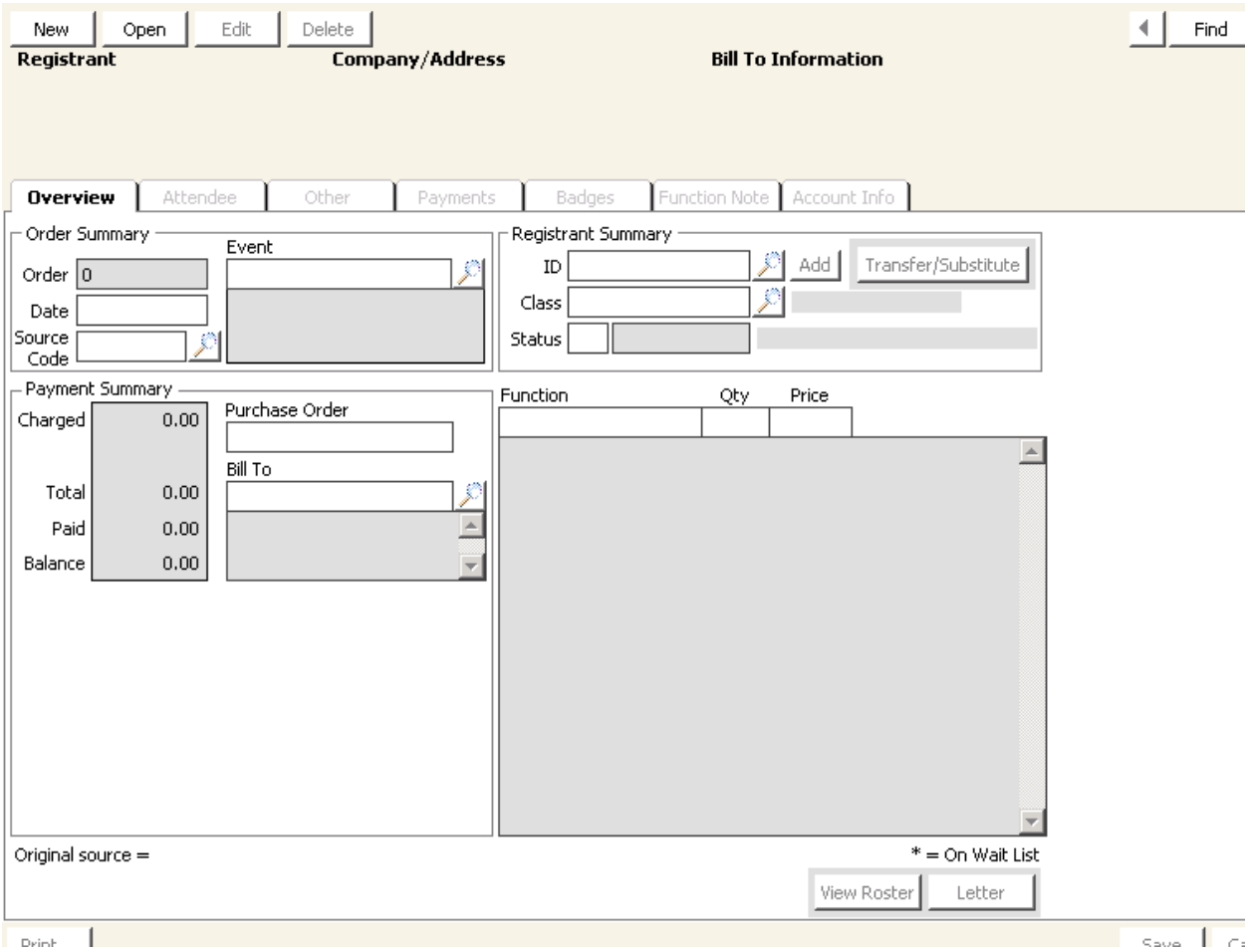
1. From Register for an event window, click Open or Find.
2. Find the registration (see "Finding an event registration") to cancel.
3. Click Delete.

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

   A message prompt is displayed.

6. Click Yes.
7. Select the Cancellation Fee product from the Function list.
8. Enter a C for canceled in the Status field.
9. Click Save.

Register for an event window



Admin Console: Home > Events > Register for an event
Desktop: Events > Register a customer

Left Arrow

Select to scroll through any new event registrations entered during the current session.

Right Arrow

Select to scroll through any new event registrations entered during the current session.

Registrant

Displays the registrant's ID, name, title, and customer type.

Company/Address

Displays the name of the registrant's company and the registrant's address.

Bill To Information

Displays the ID of the party to be billed for any registration fees.

Overview tab

(Default tab) Select to enter, edit, and view a registrant's general registration information.

Attendee tab

Select to enter, edit, and view a registrant's name and address information.

Other tab

Select to enter, edit, and view additional registration and hotel information for a registrant.

Payments tab

Select to enter, edit, and view event payment information.

Badges tab

Select to enter, edit, and view a registrant's badge information.

Function Note tab

Select to enter, edit, and view notes for event functions.

Account Info tab

Select to enter, edit, and view a registrant's account information. You may also see multiple invoices listed for any event adjustments, if your organization has enabled the option to Create Separate Invoices for Events Adjustments (an option only available to VAT-enabled organizations).

Define an event

When defining and planning events, you enter the key information iMIS uses for each event and its functions. This information, in turn, enables all other Events operations from registrations and confirmations to inquiries and reporting. Defining and planning events involves the following steps:

- Defining and cloning an event
- Entering basic event information
- Defining separate function data
- Linking to primary functions
- Defining event fee information
- Entering event resources information

To view and sort the list of events

- From Define an event window, sort the list by selecting the appropriate Sort option.
- Filter the list by selecting the appropriate View option.

To define an event

1. From Define an event window, click New.
2. Enter an Event Code.
3. Enter an event Title.
4. Enter an event Type.
5. Enter an event Status.

   Note: Events must be active before registrations can be processed. Online event registration is only available for events with an Active status.
6. Enter a Begin Date for the event.
7. Enter an End Date for the event.

8. Enter an Early Cutoff date.
9. Enter a Reg Cutoff date.
10. Enter the Maximum number of registrants you will allow to register for the event.
11. (optional) Enter the Entity Code that will receive event income.

    Note: The event entity code can be overridden at the function level.
12. (optional) Enable the Suppress Confirm option.
13. Click Save.

To enter event description information

1. Edit the event.
2. Click More and select Description to open the Event Description window.
3. Enter a description of the event.

   Note: Your administrator may have configured the Event Description window to show more fields.
4. Click Save.

To enter an event's address

1. Edit the event.
2. Click More and select Address to open the Event Address window.
3. Enter the address information for the event.

   Note: This information appears on default confirmation letters, and you can include it on other reports.
4. Check the Suppress printing of directions on Confirmation Letters check box if you do not want the directions to be printed on the confirmation letter.
5. Click Save.

To enter event coordinator information

1. Edit the event.
2. Click More and select Coordinators to open the Event Coordinators window.
3. Enter the event coordinator information.

   Note: This information appears on default confirmation letters, and you can include it on other reports.
4. (optional) Check the Suppress printing of coordinators on Confirmation Letters check box if you do not want coordinator information printed on confirmation letters.
5. Click Save.

   To enter event notes

   The Event Notes window enables you to enter additional information about an event.

1. Edit the event.
2. Click More and select Notes to open the Event Notes window.
3. Enter any applicable event notes. A maximum of 1,000 alphanumeric characters can be entered.
4. (optional) Enable the Suppress printing of Event Notes on Confirmation Letters option so that the event notes do not print on the confirmation letter.
5. (optional) Enter a SQL calculation to prevent registrants who try to register for an event, but do not meet the required criteria defined in the calculation cannot register for the event.
6. Click Save.

   To enter a SQL verification calculation

   If you enter a SQL Registration Verification Calculation, iMIS tests a registrant's eligibility based on the requirements defined in the calculation. The SQL calculation results in either a 1 or a 0. If the result is a 1, then iMIS enables you to create an order for the regis-

trant. If the result is a 0, then a message is displayed indicating that the registrant is not eligible, and the registration is canceled.

1. Edit the event.
2. Click More and select Notes to open the Event Notes window.
3. Enter a verification calculation in the SQL Registration Verification Calculation (optional) field.

   The following is a sample calculation (the calculation varies from organization to organization). The sample calculation searches for all CM (company member) types, and, if the registrant is not a CM, iMIS displays a message indicating that the registration cannot be processed.

   select COUNT(*) from Name where MEMBER_TYPE='CM' and ID = [AsiSQL(Orders.ST_ID)]
4. Click Save.
5. Restart iMIS.

   To view a roster

1. Open the event.
2. Click More and select Roster to open the Event Roster window.

   The letter C in the first column designates a canceled registration. CT in the first column designates a transferred registration.

Cloning an event

Cloning enables you to copy and duplicate an event and its functions rather than having to create a new event. Cloning is useful when you need to set up events that are identical except for the dates and times. When you clone an event, the event and function definitions are copied from the cloned event to the new event.

To clone an event

1. From Define an event window, select the event you want to clone.

2. Click Clone to open the Event Clone window.
3. Enter a new event code for the cloned event.
4. Click Save.
5. (optional) If iMIS is licensed for Hotels, and hotel information is defined for the event that is being cloned, iMIS asks if you want to copy hotel information:

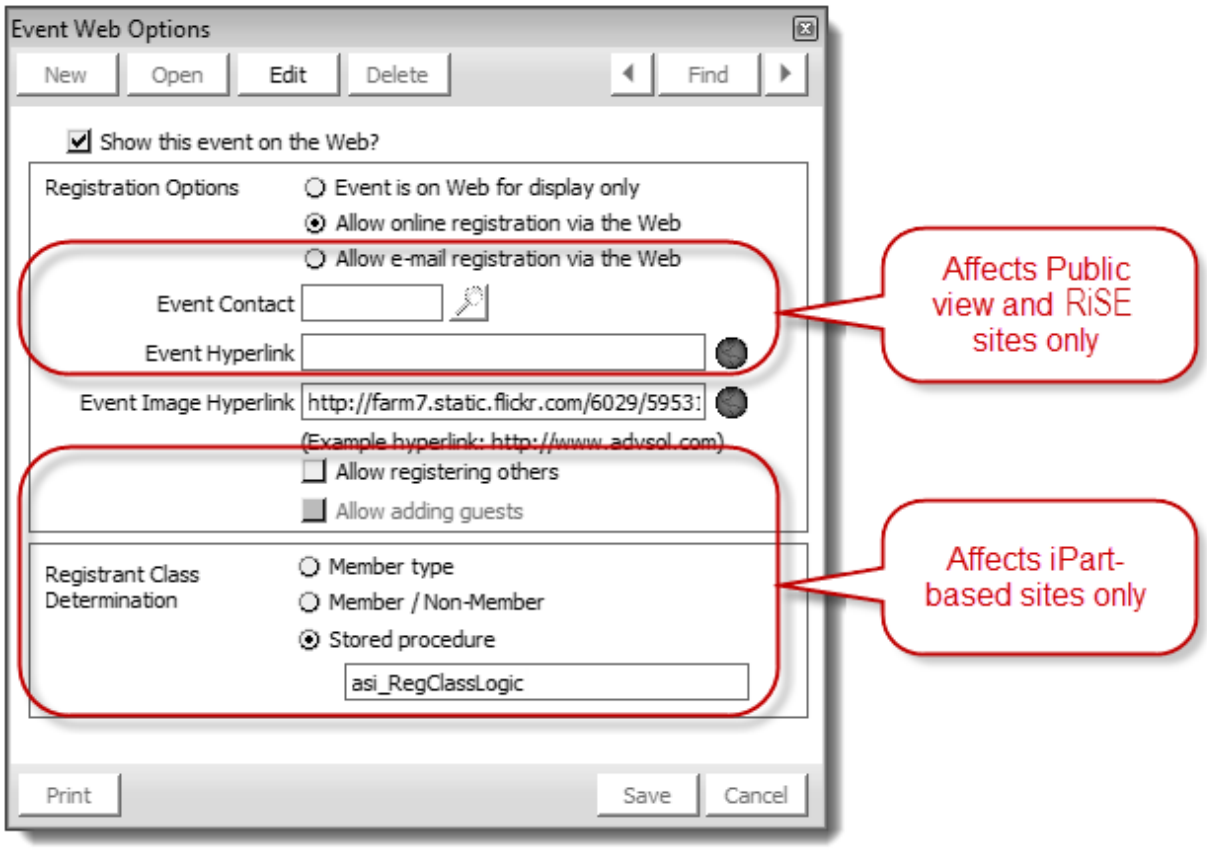
- Click Yes to copy the hotel information (including room types).
- Click No if you do not want to copy the hotel information.

6. Double-click the new event on the Define an event window to open it in the Define an event window.
7. Click Edit to make changes to the event dates, times, and details.
8. Click Save.

Configuring events for the web

After defining the basics of the event, you can define how you want the event to appear and registration to behave on the web. Only two options (Show this event on the Web? and Event Image Hyperlink) affect every type of member-facing website; the other options apply to specific platforms only:

Note: Staff users can search for all events, including events that are not web-enabled. You can only register for an event that has an Active status.



For Public view sites, note that you configure many of these iPart-only options using the Web setup wizard for events.

For iPart-based sites, see Configuring event registration for details on using these settings. The Web setup wizard for events does not apply.

To make an event available on the web

Online event registrations are only available for events with an Active status.

1. Open the event.
2. Click More and select Web Options to open the Event Web Options window.
3. Click Edit.
4. Enable the option Show this event on the Web?

Tip: If your event uses either of the Public view Registration Options that prevent online registration, your iPart-based site will disable the registration buttons and links but still allow the event to appear. You can use this feature to delay registration for an upcoming event while still allowing all details and pricing information to be viewable by your site visitors.

5. (Public view and WCM sites only) Specify these options:

- Select which Registration Option should be in effect:
- Event is on the Web for display only (useful for times before and after open registration)
- Allow online registration via the Web
- Allow e-mail registration via the Web

6. (optional) Enter the Event Contact and the Event Hyperlink.
7. Enter the Event Image Hyperlink if you want to associate a graphic with this event.

- Full path: Refer to an existing URL, such as http://example.com/myImage.jpg
- Relative path: Upload or select an image in Content Management > Manage images, and refer to it like this: /images/uploadedimages/myImage.jpg

  Tip: Image Manager lets you create subfolders, so you can group and organize images.

- (optional) Enter the Event Contact.
- (optional) Enter the Event Hyperlink.

8. (iPart-based sites only) Specify these options:

   Tip: You can use the Registration Option of Event is on the Web for display only to delay registration for an upcoming event while still allowing all details and pricing information to be viewable by your site visitors. Enabling this option disables the registration buttons and links.

- (optional) Enable Allow registering others, so that users can register others in their own organization.

- (only available with Allow registering others) If you have functions for which this is appropriate, enable Allow adding guests.
- Select which Registration Class Determination should be in effect:
- (default) Member type, for pricing by registrant class
- Member/Non-Member, for pricing simply by membership status
- Stored procedure, for overriding the registrant class to implement pricing promotions, such as 50% off additional registrants from a given company. Your stored procedure can use the current registrant ID (which is supplied as a parameter to the procedure), calculate which class to assign, and return a valid registrant class; if it does not return one, default pricing remains in force.

9. Click Save.

Closing an event

You must close an event before event MEETING and MEETFUNC activity records can be created. When closing a completed event, a registrant's order data is replaced with an event MEETING activity record.

If the Create Detail Activity checkbox is selected on the Event Function Detail window for a specific function, a MEETFUNC activity record will be created for this function when the event is closed. You can tell at a glance which event functions have this checkbox selected by looking at the function list in the Define an Event - event details window. The Activity column specifies YES if the checkbox is selected.

Note: You must ensure that you have selected the Create Detail Activity checkbox for the desired functions before you close the event.

If the Delete Event Definition on Close option is enabled on the Event System Preferences window the definition and planning records for the event are purged when you close the event. If this option is disabled, the event and product planning information remains in iMIS, the event detail is purged, and a C appears in the Status field to indicate that the event has been closed.

You can close an event any time after completing all event registrations. Open receivables are tracked in AR/Cash for any outstanding balances.

Note: If you are licensed for CEU and tracking continuing education units for one or more functions within the event that you are closing, you must update the attendance for those functions before closing the event. If an individual is marked as a no-show, you must remove that individual from the function to avoid creating a MEETFUNC activity record for the no-show.

To close an event

1. Open the event.
2. Review the Activity column in the function list to ensure that a value of YES is displayed for every function for which you want MEETFUNC activity records created when you close the event.

   To change an Activity value to YES, edit the function and select the Create Detail Activity checkbox in the Event Function Detail window.
3. Click More and select Close Current Meetings.

   If the system finds current registrants, a message is displayed stating that the event has current registrants.
4. Click Yes.

   A system message prompts you to verify closing the event.
5. Click Yes.

   A message is displayed notifying you that all event details will be removed and that activity history will be generated for all of the registrants.
6. Click Yes to close the event.

Canceling an event

When you cancel an event, iMIS automatically reverses the accounting entries that were created during order processing. The income accounts are debited and AR/Cash is

credited. All open receivable balances for unpaid orders are closed (brought to zero balance). For registrants who have already paid, the reversed entry results in open credits. Open credits can be refunded or can be applied to other orders or event registrations.

If you enable the Delete Event Definition on Close option on the Event System Preferences window the event definition is deleted when you cancel the event. If the option is not enabled, the event you are canceling appears on the list of events on the Define an event window with a status of X.

Canceling an event, unlike canceling a registration, is irreversible. All registration details are always deleted after an event is canceled.

To cancel an event

1. Open the event.
2. Click More and select Cancel Current Meeting.

- If the system finds current registrants, a message prompts you to verify the cancellation of the event.

  Click Yes if you receive this message.

  A system message prompts you to verify canceling the event.

3. Click Yes.

   A message prompts you to verify canceling the event because the action is not reversible.

4. Click Yes to cancel the event.

Define Event Functions

Some tips for entering data to the Events Function Detail window and its child windows will help you enter your data more efficiency.

- If the Event Function Detail window is in insert or edit mode, you cannot select a new function from the Define an Event window. You must cancel or save first.

- If the Event Function Detail window and any of its child windows are open, but not in edit mode, you can click on the Define an event window and select another function. If you select a new function, you can enter data to the Event Function Detail window and its child windows listed under More.
- When the Event Function Detail window is in insert or edit mode, all of its child windows are also in insert and edit mode. A save in one window will save data in all windows.
- An exception is, if the Function Links window is open, the user cannot click behind it to access the Function Detail window, a child window, or the function list on Define an Event window.

To define event functions

1. From Define an event window, open the event.
2. Click Insert to open the Event Function Detail window.
3. Enter a unique Function Code using any combination of letters and/or numbers.
4. Enter a Title (function name) of up to 60 characters. The title you enter here appears on reports that show individual products, such as confirmation letters and detailed rosters.

   Note: The function Type defaults to REG, and the Status defaults to A.
5. In the Type field, accept the REG default, or select the lookup icon to select a value.
6. In the Status field, accept the A default, or select the lookup icon to select a value.
7. (optional) Enter a numeric Sort Sequence.
8. (optional) Enter a Begin Date for the function.
9. (optional) Enter a beginning Time for the function.
10. (optional) Enter an End Date for the function.
11. (optional) Enter an ending Time for the function.
12. (optional) Enter a Description.
13. (optional) Enter a Maximum number of registrants.

14. (optional) Enter a Conflict Code, or if conflict codes have been defined, select the lookup icon to search for a code.

    Note: You can set up Conflict Code validation by editing the CONFLICT_CODE table (from Customers, select Set up tables > General lookup/validation, and edit or create the table named CONFLICT_CODE).

15. (optional) Enter the Last Ticket #. If printing tickets for the function, enter a specific start number, or accept the 0 default.

16. Check the Fundraising Function checkbox. The Fundraising specific fields (Appeal, Campaign, and Fair Market Value) appear, and the Entity Code field changes to the Fund field.

    Note: The Fund field is restricted to codes that are marked "Is Fund" in iMIS setup. Entity Code can contain any Org Code defined in iMIS setup.

17. Fill in the following fundraising information (all fields are optional):

    - Fund
    - Appeal
    - Campaign
    - Fair Market Value

18. (optional) Select Print Tickets if you want to generate tickets for this function.

19. (optional) Select Automatic Option if you want new registrants to be registered for the function automatically.

20. (optional) Select Create Detail Activity if you want MEETFUNC activity records to be created for the registrants for this function at the time the event is closed.

21. Click Save.

    To edit event functions

1. Open the event and Edit the function.

2. Make any necessary changes.
3. Click Save.

To delete an event function

1. Open the event.
2. Select an event function and click Delete.

   A system message prompts you to verify the function's deletion.
3. Click Yes to delete the function.

   Note: You cannot delete a function until you cancel all registrations for the function. If you attempt to delete a function that has registrants, a system message explains why you cannot delete the function.

Setting function fees

Registration fees may be based on the registration date (early, regular, and late), the registrant class (member or non-member), or a combination of registration date and registrant class.

You also can choose to charge all of your registrants the same price, regardless of registrant class or registration date by defining a default regular price.

The Event Function Definition - Fees window displays a list of each registrant class and one labeled *Default*. These lines are where you enter the various fees for this function and the General Ledger accounts to which the fees apply. You must supply information on the Event Function Definition - Fees window for each function, even if you only enable the Comp option and no fees apply.

To define event function fees and GL information

Note: Although this procedure describes assigning a flat fee for all registrant classes and all registration dates, you can assign different fees for different registrant classes and registration dates.

1. Open the event and Edit the function.

2. Click More and select Fees to open the Event Function Definition - Fees window opens.
3. Choose a registrant class or the *Default* class.
4. Enter the amount for the Early, Regular, and Late fees or check the Comp box if you will not charge members of this registrant class a fee for this function.
5. (optional) Enter the general ledger account number where the income should be credited in the Income Account field, or click the lookup icon to select an account.

   Note: If you are using a General Ledger interface, you must assign a GL account number to all fees other than complimentary.
6. (optional) Enter the deferred income account in the Deferred Account field, or click the lookup icon to select an account.
7. Click Save.

Fee structure scenarios

Just as event definitions vary from simple to complex, so do the fee and accounting structures. You can choose from:

- No fees charged
- Single fee and income account
- Early and regular fees for all classes
- Multiple fees and income accounts by class
- Multiple fees by class, single income account
- Single fee and multiple income accounts by class
- Multiple fees for some classes, single fees for others
- Some functions with fees by class, some with fees for all

Use the Event Function Definition - Fees window to set up these structures.

No Fees Charged

1. Define a single event function through the Event Function Detail window so that you can process registrations for the event.
2. To speed registration, enable the Automatic Option.
3. Because no fees apply to any registrant class, enable the Comp option for the Default registrant class.
4. No accounting information is involved, so leave the Income Account blank.
5. Click Save.

Single Fee and Income Account

1. Define a single event function through the Event Function Detail window so that you can process registrations for the event.
2. To speed registration, enable the Automatic Option.
3. Enter a single fee amount in the Regular field for the Default registrant class.
4. Enter the single General Ledger account number for the Default registrant class if you are using the iMIS General Ledger (G/L) interface or want to track and report on the accounting entries.
5. Click Save.

Early and Regular Fees for All Classes

Assume you are offering early rates to encourage people to mail in their registrations. You lower the fee from the regular $55 to $45 for all registrations received on or before May 15, but you still only have one class of registrant. Use this function/fee setup:

1. Define a single function to record registrations.
2. To speed registration, enable the Automatic Option.
3. Enter 45 in the Early column and 55 in the Regular column. Enter the 5/15 date in the Early Cutoff field on the Define an event window.

4. Enter the single General Ledger account number for the Default registrant class if you are using iMIS General Ledger (G/L) interface or want to track and report on the accounting entries.
5. Click Save.

Multiple Fees and Income Accounts by Class

Assume you are charging different rates for a single event based on the membership status (class) of the registrant. You have separate income accounts for recording the fees, and early and regular fees are $75 and $90 for customers, and $125 and $150 for nonmembers. Follow these steps to define the fees:

1. Define a single function to record registrations.
2. To speed registration, enable the Automatic Option.
3. Because the fees vary according to status and class, skip the Default registrant class; instead, enter fees of $75 and $90 in the Early and Regular columns for the Member registrant class and $125 and $150 in the Early and Regular columns for the Nonmember registrant class.
4. If you have more groups to register (such as speakers or staff), either record their fee information in their class lines or as a whole in the *Default* line.
5. If you are tracking the income accounts, enter them separately on the Member and Nonmember lines, respectively.
6. Click Save.

Multiple Fees by Class, Single Income Account

This setup is similar to the scenario above except there is only one income account, rather than several, for recording the fees. To set up these fees:

1. You still must enter the different fee amounts on each Registrant Class line.
2. Although you could enter the same account for both the Member and Nonmember registrant classes, you simply can enter the single account for the Default registrant class.

3. Click Save.

Single Fee and Multiple Income Accounts by Class

This is an uncommon situation, but you can set up such a scenario. You can process identical fees in separate income accounts based on registrant class by following these steps:

1. The same fee structure (early, regular, and late) applies to all registrant classes. Record the fees for each registrant class instead of the Default registrant class.
2. Record the different income account numbers for each registrant class instead of the Default registrant class.
3. Click Save.

Multiple Fees for Some Classes, Single Fees for Others

In this scenario, you will set member and nonmember fees separately as before. However, you also are providing complimentary (free) registrations for speakers, exhibitors, and staff customers. To set up this fee structure:

1. Enter the fee for the Default registrant class because all nonstandard registrant classes are assigned the same fee.
2. Record the different fee amounts for the Member and Nonmember registrant classes.
3. Although you could mark Comp for each remaining registrant class, you also can enable it for the Default registrant class.
4. Click Save.

Some Functions with Fees by Class, Some with Fees for All

In this situation, you need to set up a conference in which some functions, such as the registration, require that fees vary by class and date, but other functions have a single fee or none at all. While this sounds complex, the setup is simple. Do one of the following:

- For each function, record variable fee amounts for each registrant class
- Edit the Default registrant class by enabling the Comp option or entering a fixed amount.

Planning your functions

iMIS enables you to plan each function to the smallest detail, including information on food and beverages, equipment, room arrangements, and notes. This information is important for internal usage and for communicating your plans to hotels and conference centers. Detailed plans may be printed and sent to hotel staff or other personnel in charge of planning and arranging event function facilities.

The Event Function Definition - Plan window is used for:

- Room planning and setup information, including scheduling
- Expected attendance and related figures
- Notes about required resources

To define a plan

1. Open the event and Edit the function.
2. Click More and select Plan to open the Event Function Definition - Plan window.
3. Enter the Set up and Post times.
4. Enter the Expected number of attendees.
5. (optional) Enter the number of attendees you want to Guarantee.
6. (optional) Enter the Set number of attendees for which the room should be set up or arranged.
7. Select the resource items, and the prompts enabled for the resource in the Set up event resources window will display.
8. Define the details for each resource item. For example, enter a Time for breakfast to be setup or served and any additional information in the Text field.
9. Click Save.
10. Select Display Plan to display the Room Setup Report on the screen:

Tracking CEU credits

If your system is licensed for iMIS Continuing Education (CEU), you can track the education credits awarded to function attendees. Because CEU data is managed at the function level, you can easily track multiple functions that offer different awards and credits during a single event.

To track credit for continuing education

1. Open the event and Edit the function.
2. Click More and select CEU to open the Event Function Definition - CEU window.
3. Enter the CEU Type (use the lookup icon to find a CEU type).
4. Enter the Hours/Points.
5. Click Save.

To mark attendance

The first time you open the Function Attendance window for a function, all registrants appear on the list with an unmarked attendance status. When a registrant's status is changed to “Attended,” a pointer and the amount of continuing education credits awarded appear in the Attended column.

Mark attendance by double-clicking on the individual's name to change the attendance status as follows:

- If the line is unmarked (no pointer and zero hours/points in the Attended column), double-clicking marks it as Attended.
- If the line is marked, double-clicking will unmark it.

This toggling action lets you mark attendance by either of these two approaches:

- Manually mark each individual who attended.
- Globally mark the group and, on an exception basis, only unmark those who did not attend (no-shows).

To update attendance (CEU)

1. Open the event and Edit the function.
2. Click More and select CEU to open the Event Function Definition - CEU window.
3. Click Update Attendance to open the Function Attendance window.
4. Mark the registrants as attended. You have two options:

- Click Mark All Attended to select all the registrants, click Yes, and then double-click the registrants who did not attend the function to mark them as absent.
- Double-click each registrant individually to mark them as attended.

5. If you make mistakes or lose track of your changes, return all individuals to the unmarked status, click Mark All Absent, click Yes, and start over with the attendance marking.

To adjust continuing education credits

Complete the following steps to adjust the continuing education credits awarded to a registrant to an amount other than that defined for the function:

1. Open the event and Edit the function.
2. Click More and select CEU to open the Event Function Definition - CEU window.
3. Click Update Attendance to open the Function Attendance window.
4. Select a registrant on the Function Attendance window.
5. Click Adjust Hours to open the Adjust Hours window. You may have to reposition the Function Attendance and Event Function Definition - CEU windows.
6. Enter the correct credit amount for the registrant.
7. Click Save.

Evaluating speakers

Enter any evaluation data that you want to record for a speaker's activity record before closing an event. The data used to generate the activity records consists of the evaluation

criteria within the speaker's group. This evaluation criteria is defined on the Event Function Definition - Speakers window and is indented underneath the group's heading.

You can enter several speaker evaluations for a given function, one for each speaker resource group defined on the Set up event resources window (from Events, select Set up tables > Event resources).

To enter evaluation data

Before you can evaluate a speaker, you first must define the speaker activity type and the speaker evaluation criteria. See Defining Speakers and Evaluation Criteria for more.

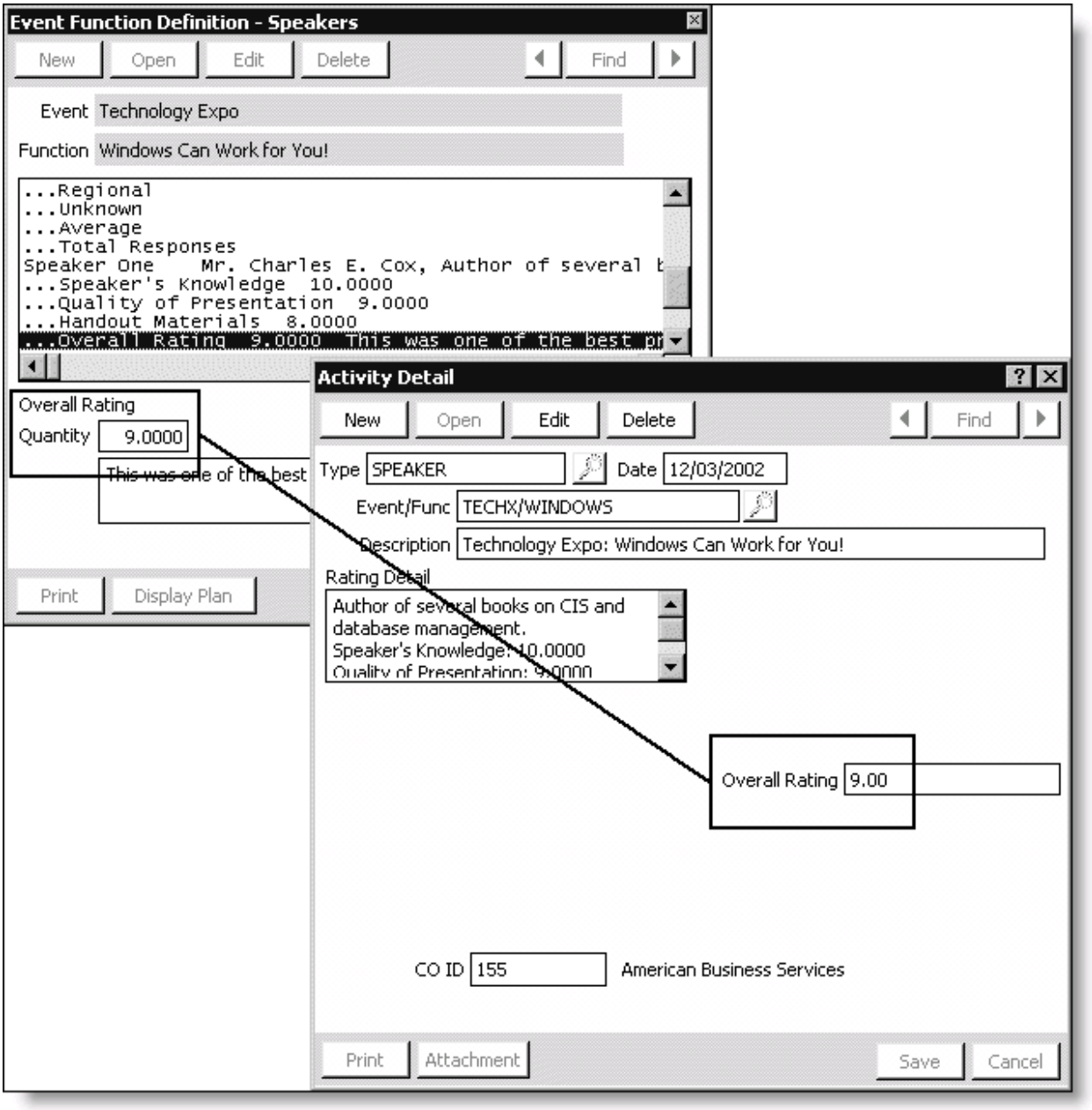
1. Open the event and Edit the function.
2. Click More and select Speakers to open the Event Function Definition - Speakers window.
3. From the list, select the speaker group for which you want to enter evaluation data.
4. Enter the Id of the speaker (use the lookup icon to search for an ID).
5. In the text box below the Id field, enter any identifying information, such as a presentation title.
6. From the list, select the first evaluation criterion.
7. In the Qty field, enter the numeric score you calculated from the evaluations (record digits with up to two decimal places).
8. In the text box below the Qty field, enter any additional comments.
9. Repeat the process for the remaining group evaluation criteria.
10. Click Save.

Speaker activity records

Activity records are created for speakers when an event is closed. The data used to generate the activity records consists of the evaluation criteria defined on the Event Function Definition - Speakers window.

Because the Overall Rating record contains the word “overall,” its Quantity, as defined for the speaker on the Event Function Definition - Speakers window, will populate the Qty/CEU field (Overall Rating prompt) on the Activity Detail window for future analysis.

Note: The calculation of the Overall Rating is not performed automatically for a speaker's activity record. You must define a value (Quantity) for the Overall Rating on the Event Function Definition - Speakers window for it to be recorded for a speaker's activity record and display on the Activity Detail window.



Example of a speaker's Overall Rating recorded on the Event Function Definition - Speakers window and displayed on the speaker's Activity Detail window

Viewing and assigning event function staff

Use the Event Function Definition - Staff window to:

- View all event staff roles as defined by your organization using Events > Set up tables > Event Resources
- View any staff members that have been assigned roles for an event function
- Assign staff to an event function
- Run a report containing basic details about the event function, staff members assigned to the event function, and each staff member's role for that event function

To assign staff to an event function

1. Open the event and Edit the function you want to staff.
2. Click More and select Staff to open the Event Function Definition - Staff window.
3. Select a staff role from the list. Once a role is highlighted, the Id field appears at the bottom of the window.

   Note: If the Id field does not appear, return to the Set up tables > Event Resources window, select the staff role you wish to assign, and make sure that Id has been selected in the Field 1 Usage option.
4. Enter the ID in the Id field, or use Find to locate the individual: select the QuickLook button to the right of the Id field. When you locate the staff member, double-click the name to assign it to the event function.
5. Click Save.

To view staff assigned to an event function

1. Open the event and Edit the function.
2. Click More and select Staff to open the Event Function Definition - Staff window.

Link event functions

The Links option enables you to associate a primary (parent) event function to secondary (child) event functions. When a registrant registers for the primary event function, iMIS automatically registers the registrant for all secondary functions that are linked to the primary function.

Linking event functions is a shortcut for data entry. If you clear the primary function, then iMIS leaves the linked function(s) selected (that is, selecting the parent also selects the children, but clearing the parent affects only the parent).

You have the option of individually selecting and clearing linked functions at any point during the event registration process. However, if you have no cost associated with an optional child function, such as a banquet that does not have an additional cost, you should set up the child function to be complimentary (with pricing) so that your headcount is accurate even when you remove someone from a parent function registration list.

Note: The linking feature does not affect pricing or complimentary functions.

To link event functions

1. Open the event and Edit the function.
2. Click More and select Links to open the Function Links window.
3. Click Insert to open the Child Components window.
4. Select a secondary event function that you want to link to the primary function.
5. Click OK to link the secondary function to the primary function. The Child Components window will close, and the linked function will be added to the Function Links window.
6. Click OK.

Note: To print tickets for a MEMO function, it must be linked to a REG function, and Print Tickets must be enabled for the REG function.

To delete an event function link

1. Open the event and Edit the function.

2. Click More and select Links to open the Function Links window.
3. Select the linked secondary event function you want to delete.
4. Click Delete.
5. Click Yes.
6. Click OK.

Note: The primary and deleted secondary function(s) are no longer linked. You did not delete any functions. If you completed a registration with a primary function linked to a secondary function, you manually must delete the linked (secondary) function from the registration.

To view an event function roster

1. Open the event and the function
2. Click More and select Roster to open the Function Roster window.

Hotel Room Block Management

iMIS Hotel Room Block Management is an extension of iMIS Events and enables you to book hotel room blocks quickly and efficiently for specific events.

This section provides information on the following topics:

- Defining hotels and room availability for your events
- Booking rooms through the event registration process
- Setting up rooms for registrants to share
- Canceling reservations and overbooking rooms
- Generating rosters and reports for distribution to hotel personnel and other associated services

The rosters included in your Standard Reports provide a list of persons assigned to each room per night, so hotel personnel can manage the reservations according to their needs

and policies. Additional output and inquiry information helps event managers track room reservations and room availability.

Defining hotels

You will need to create a list of available hotels for each event. If you routinely use the same hotels for your events, set up an ID for each hotel. This will allow you to generate hotel information automatically when setting up future events. If no ID exists for a hotel, you can enter the hotel contact and address information directly through the Hotels window.

To enter hotel information

1. Open the event.
2. Click Hotels to open the Hotels window.
3. Click New.
4. Enter the hotel information:

- If you created a record for the hotel in the Manage customers window, enter the Id for the hotel to populate the appropriate fields automatically. If you set up a specific customer type for your hotels, search by customer type to locate those records.

  Note: To locate your hotel records easily, maintain a customer type specifically for them.
- If the hotel's record links to an associated customer record, the contact name, hotel name, address, and telephone data automatically populate the appropriate fields on the Hotels window.
- If you have not created a record for the hotel, manually enter the hotel's information.

5. Click Save.
6. Click New for each additional hotel you want to define, and then repeat the process.

To define hotel room inventory

1. Open the event.

2. Click Hotels to open the Hotels window.
3. Select the hotel for which you need to set up a room inventory.
4. Click Rooms to open the Room Types window.
5. Click New.
6. Enter a code for the Room Type (for example, DOUBLE or SINGLE).
7. Accept the default Description, or enter another Description for the room type.

   For each reservation date, enter the date in the Date field and the number of rooms needed in the Contract field. To add dates, select the empty line directly below the last table entry, and then enter Date and Contract information for that date.

   Note: The Reserved quantity updates automatically as rooms are booked. The Avail quantity equals the contracted quantity minus the number of room nights reserved (available = contracted - reserved).
8. (optional) If you also will be billing registrants for their hotel room reservations, enter the amount (per night) in the Rate field for each room type and the GL account into which the charges will be booked. This GL account may represent a liability account (for example, payable to the hotel) or an income account.
9. If VAT is applicable to the room rate, enable the Taxable option and enter the appropriate tax code.
10. Click Save.
11. To define additional room types, click New, and repeat the process.

Managing reservations

Use the Register for an event window's Other tab to enter and cancel hotel reservations. Click Available to view hotel availability.

Use the Register a customer window's Other> Sharing tab to enable the room sharing option.

To enter hotel reservations

Hotel reservations are entered through the Register a customer window's Other tab.

1. From Register for an event window, click Open or Find.
2. Enter the Event code (use the lookup icon to search for the event), and Tab to the registrant ID field.
3. Enter the registrant's ID (use the lookup icon to search for the registrant) and press Tab. The customer's current registration information displays in the Register a customer window's Other tab.
4. Click Edit.
5. Select the Other tab.
6. To reserve a hotel room, select a hotel room from the Function drop-down list.
7. Enter a non-zero number in the Qty field (defaults to 1) for the number of rooms needed.

   Note: If your reservation is for multiple-nights, treat the reservation as a single unit. For example, a hotel reservation for four nights would display with a Qty of 1 and Room Nights of 4. The hotel reservation lists as a single order with the cost calculated for each reserved night.
8. Enter the room Rate.
9. Enter the Confirmed date of the reservation.
10. Enter dates in the Arrival and Departure fields. The number of Room Nights calculates and displays.

    iMIS alerts you if the Arrival date is equal to or later than the Departure date or if you book a room for a date that is sold-out or undefined in the Room Types window. However, iMIS will allow you to overbook and reserve a sold-out room. Click Available to open the Hotel Availability window to determine hotel room availability.
11. (optional) Enter any other relevant registrant information that the hotel will need in the Note and Other Fields. The Other Fields are user-defined fields and only display if they

have been set up in the Set up module window (from Events, select Set up module).

12. Click Save.

To determine hotel room availability

1. From Register for an event window, click Open or Find
2. Enter the Event code (use the lookup icon to search for the event).
3. Enter the registrant's ID (use the lookup icon to search for the registrant), and press Tab. The customer's current registration information displays on the Register a customer window's Overview tab.
4. Click Edit.
5. Select the Other tab.
6. Click Available to open the Hotel Availability window.
7. Select the View option to narrow your search.
8. Click Refresh.
9. Click OK.

To use room sharing

1. Register the primary registrant for a room.
2. From Register for an event window, Open the record of the registrant who will share the room with the primary registrant.
3. Click Edit.
4. Select the Other tab.
5. Click Sharing to open the Room Sharing window.
6. Enable the Sharing option.
7. Enter the Primary Room Holder Registration Number (use the lookup icon to locate the primary registrant).

8. Double-click on the roommate's name. The registration number of the primary registrant will display, and the primary registrant's name will display in the RoomMates field.
9. Click Save.

   When you return to the Register a customer window's Other tab, note that nothing displays in the function list for hotels. The room only appears in the primary room holder's function list because it is a shared room.

   Generate the Hotel Room Roster Report to see the primary room holder's functions, qty/-price information, the other registrant who is sharing the room, and the primary registrant's arrival/departure dates (if entered).

   To cancel a reservation

   To cancel a room reservation, simply edit the registration and change the room quantity of the canceled reservation to zero.

   Cancel and change rooms manually (rather than allowing iMIS to automatically change when a registrant changes a room) so registrants can register for two or more room types.

   To overbook rooms

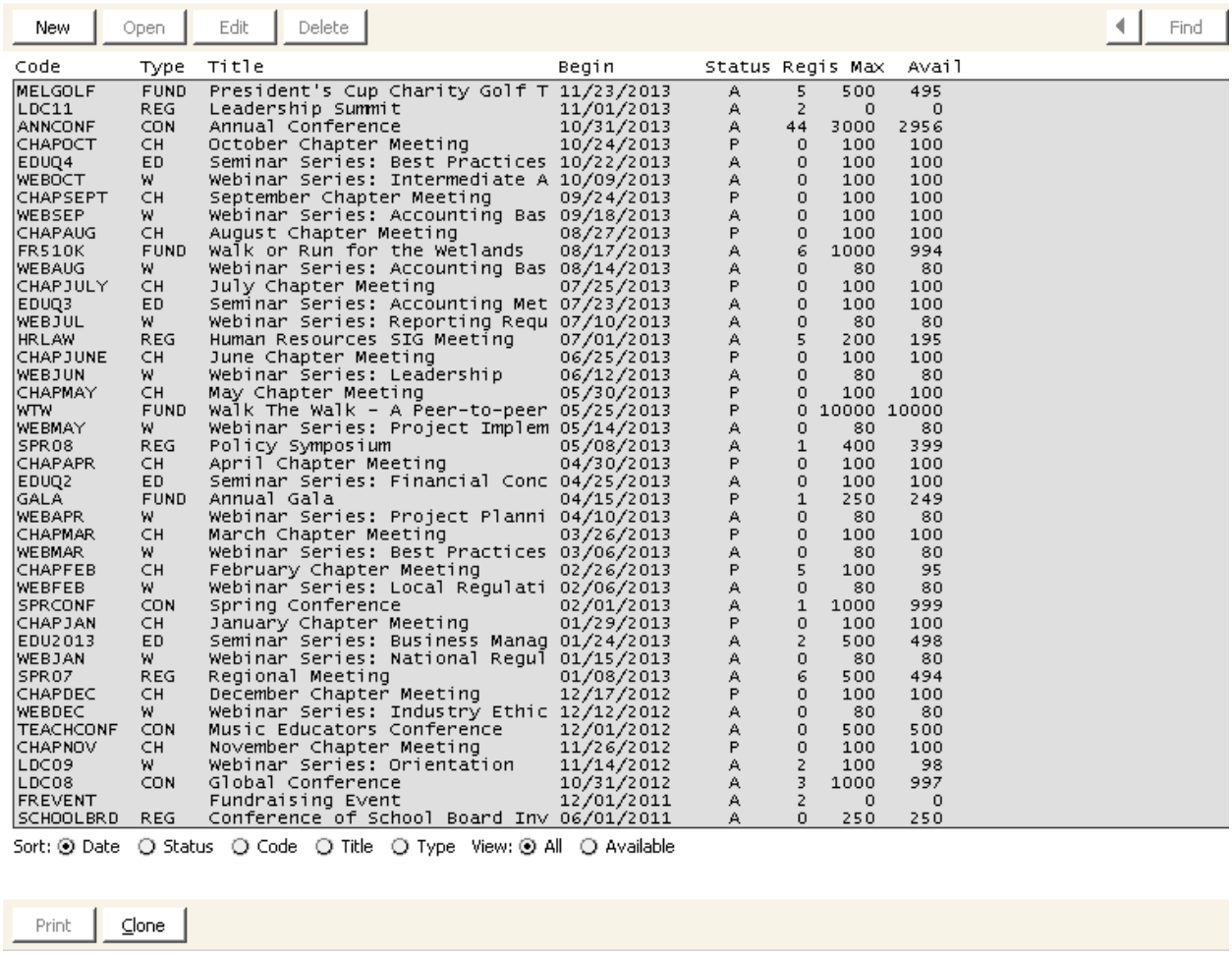
   An overbooked room will display as an amount in parenthesis (1) in the Hotel Room Bookings Availability Report. The Reserved Rooms inventory will reflect this also by adding the quantity to its total.

   Each time you overbook, the quantity is added to all of the totals just as with a regular booking, except that the Availability number appears in parentheses to signify a negative number. The Contract totals will be less than the reserved quantity for this room type.

Event window definitions

Define an event window

A list of the defined events and their status are displayed.



Admin Console: Home > Events > Define an event

Desktop: Events > Define an event

Code

Lists the user-defined event codes defined in the Define an event window (from Events, select Define an event, and double-click an event).

Type

Lists the user-defined event types defined in the Define an event window (from Events, select Define an event, and double-click an event).

Title

Lists the user-defined event titles defined in the Define an event window (from Events, select Define an event, and double-click an event).

Begin

Lists the event's start date defined in the Define an event window (from Events, select Define an event, and double-click an event).

Status

Lists the event status as defined in the Define an event window (from Events, select Define an event, and double-click an event):

- A – Active (registrations are accepted)
- P – Pending (default, still in the planning stages)
- F – Frozen (currently unavailable for registration)
- C – Closed (registrations no longer accepted)
- X – Canceled

Regis

Lists the current number of registrants excluding cancelled, cancelled/transferred, and guests.

Max

Lists the maximum number of registrants allowed as defined in the Define an event window (from Events, select Define an event, and double-click an event).

Avail

Lists the number of open registrations remaining (Max minus Regis).

Sort

Specifies the sort order of the displayed events. The events can be sorted in descending order by begin Date, or alphabetically by Status, Code, Title, or Type. If an event has no begin date, it appears at the bottom of the list when ordered by Date. When sorted by

Date, multiple events with the same begin date are sorted in ascending order by the event Code.

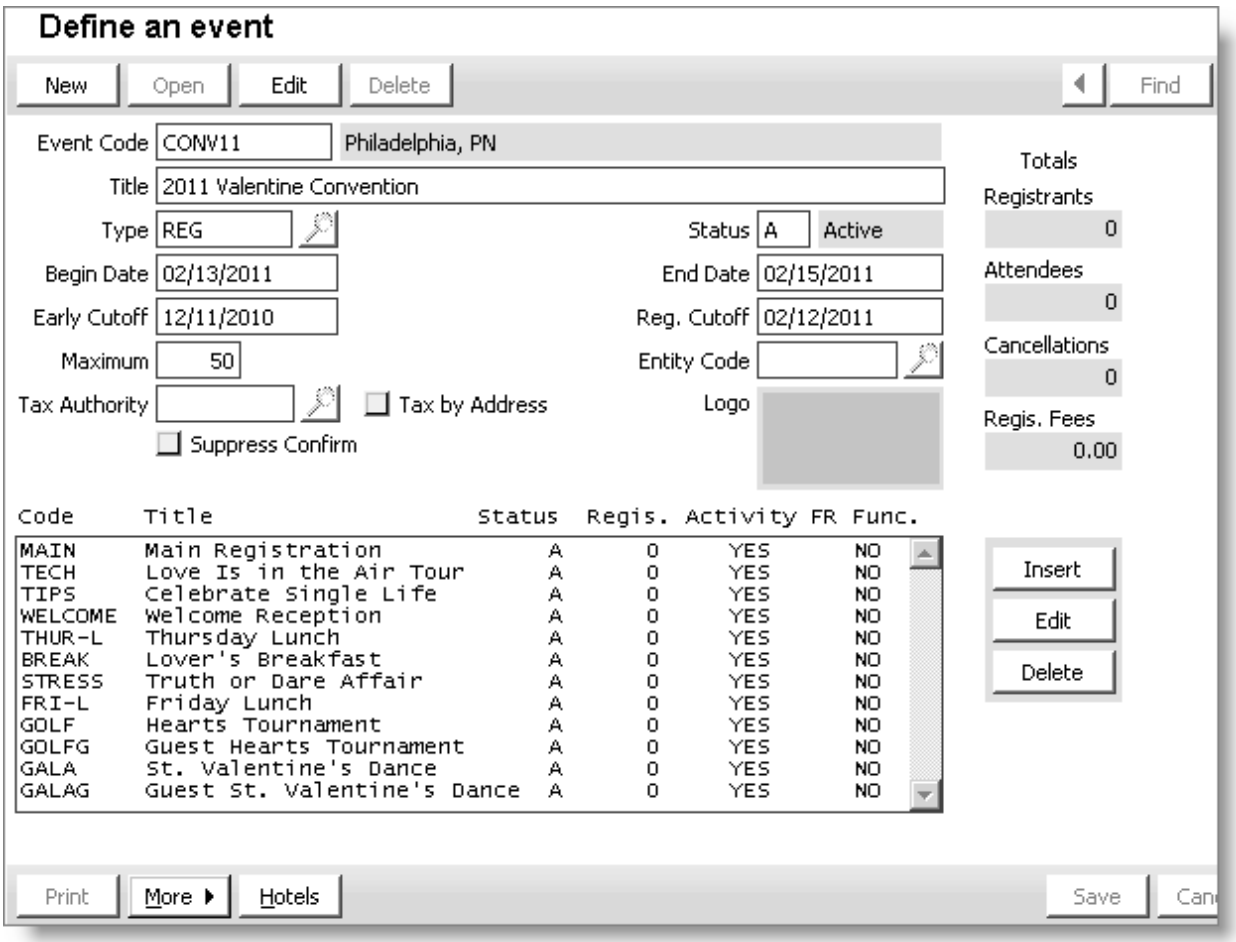
View

Specifies whether the list displays All events or only Available events (Status = A).

Clone

Clones an event.

Define an event - event details window



Admin Console: Home > Events > Define an event, and click New

Desktop: Events > Define an event, and click New

Event Code

Designates a unique code for the event. You can use a combination of letters and/or numbers to represent the event (do not use spaces, apostrophes, quotation marks, forward slash (/), or dashes).

Title

Specifies the name of the event. This title appears in windows and reports generated for this event.

Type

Specifies an event type.

The type defaults to EXPO for exposition events created using the Exposition module. Events to be managed using the Exhibition module should be set to EX.

Note: You can define additional type values on the MEETING_TYPE general look-up/validation table. For example, you can add AWARD for award ceremonies. For details, see Creating General Lookup/Validation Tables.

Status

This field specifies the event status:

- A – Active
- P – Pending (default, still in planning stage)
- F – Frozen (currently unavailable for active ordering., for example, on-site orders after an event has already started)
- C – Closed (orders no longer accepted)
- X – Canceled

Note: When you change the status of an event that is displayed on the web, it will take a few minutes before that change is reflected in the web view.

Begin Date

Specifies the event start date.

Note: The Begin Date determines when deferred income is transferred to earned income for an event.

End Date

Specifies the date the event ends.

Early Cutoff

Specifies the last calendar date a discounted rate can be applied for early registrations.

Note: If you do not vary fees for functions based upon the registration date, leave this field blank.

Reg Cutoff

Specifies the last calendar date the regular rate can be applied. If regular and late fees are set up as part of the event definition, any registrations entered after the regular cutoff date are automatically charged a late fee. If you do not charge a higher fee for late orders, leave this field blank.

Maximum

Specifies the maximum attendance limit for the event. The attendance limit and the number of available registrations (attendance limit minus registrations to date), displays for this event on the Define an event window.

Entity Code

(Displayed only when Multiple Entities is checked on the AR/Cash Set up module window) Specifies the accounting entity to which event income will be assigned. Event functions that do not specify an entity code will use this entity code. Event functions that specify their own entity code will ignore this code.

Tax Authority

(Appears only when Canadian taxation is enabled) Specifies the Canadian tax authority that applies to the event.

Tax by address

(Appears only when Canadian taxation is enabled) For HST, designates this event as taxable according to the registrant's address, as for virtual events.

Tax by address causes the appropriate tax to be charged based on the province specified in the registrant's Preferred Shipping Address. If that is unavailable, iMIS defaults to the tax authority of the event. Registrants see the HST amounts itemized in their carts and receipts.

Note: Events not using Tax by Address still charge tax using the event's tax authority, and iMIS respects the Tax Exempt designation on the Name Fin tab.

Suppress Confirm

Specifies that confirmation notices will not be printed for this event.

Logo

Specifies an event logo that can be printed on badges. If there is no logo in this area, iMIS uses your organization's default logo stored in the Organization Names window for badges.

Function list

Lists the functions that have been defined for the event. A value of YES in the Activity column indicates which event functions have the Create Detail Activity checkbox selected on the Event Function Detail window, which results in MEETFUNC activity records being created for the function when the event is closed.

Totals

- Registrants – Displays the total number of registrants including cancelled and cancelled/transferred registrants, but excluding guests.
- Attendees – Displays the total number of registrants including guests, but excluding cancelled and cancelled/transferred registrants.
- Cancellations – Displays the total number of cancelled and cancelled/transferred registrations.
- Regis Fee – Lists the total registration charges for all of the event registrations.

Insert

Opens the Event Function Detail window.

Edit

Opens the selected function in the Event Function Detail window.

Delete

Deletes the selected function.

More

Displays a menu of the following event setup options:

- Description – Opens the Event Description window used for entering a text description of the event.

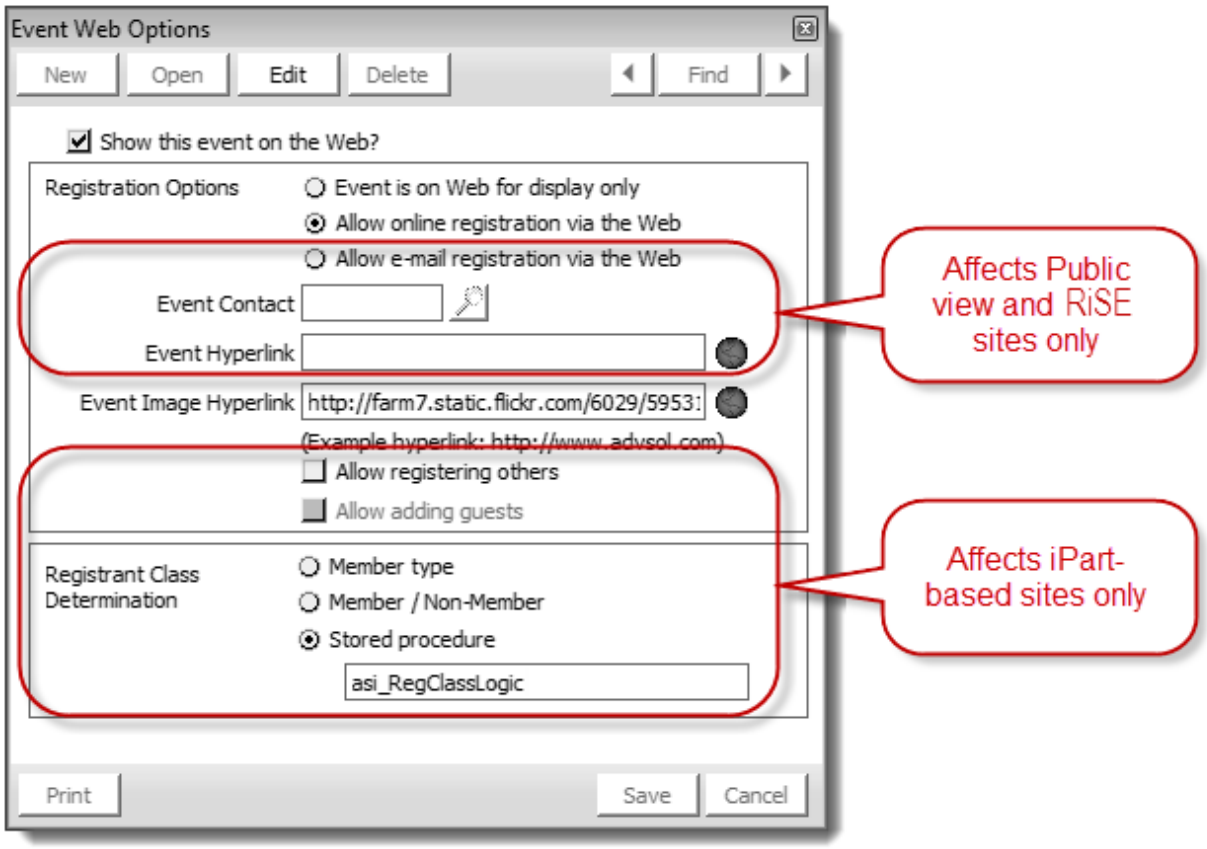
  Note: Place key search terms within the first 300 characters of the description. In the Public view, search truncates the description to 300 characters, so only text within that range yields search results for users.
- Address – Opens the Event Address window used for entering the event address and directions to the event.
- Coordinators – Opens the Event Coordinators window used for entering the names of event coordinators.
- Notes – Opens the Event Notes window used for entering additional event information as well as a SQL Registration Verification Calculation.
- Roster – Opens the Event Roster window, which displays a list of event registrants.
- Close Current Event – Closes the event.
- Cancel Current Event – Cancels the event.
- Exhibit Rules – Opens the Rules for Exhibition Complimentary Registrations window used to enter text table rules and calculations for awarding complimentary registrations.

- Web Options – Opens the Event Web Options window, which lets you set the appearance and behavior of registration on the web.
- Web Setup Wizard – Launches the Event Web Setup wizard to define details to be displayed on the web (Public view only).

  Hotels

  (Displayed when licensed for Hotels) Opens the Hotels window.

Event Web Options window



Admin Console: Home > Events > Define an event, open an event, select More > Web Options
Desktop: Events > Define an event, open an event, select More > Web Options

Show this event on the Web

This option lets events appear in the search results of Search iParts, such as the Events List in the Member sample site.

Tip: If your event uses either of the Public view Registration Options that prevent online registration, your iPart-based site will disable the registration buttons and links but still allow the event to appear. You can use this feature to delay registration for an upcoming event while still allowing all details and pricing information to be viewable by your site visitors.

(Optional) Event Image Hyperlink

Add an image to display on the web

- Full path: Refer to an existing URL, such as http://example.com/myImage.jpg
- Relative path: Upload or select an image in Content Management > Manage images, and refer to it like this: /images/uploadedimages/myImage.jpg

Tip: Image Manager lets you create subfolders, so you can group and organize images.

(iPart-based sites only) Specify these options:

Tip: You can use the Registration Option of Event is on the Web for display only to delay registration for an upcoming event while still allowing all details and pricing information to be viewable by your site visitors. Enabling this option disables the registration buttons and links.

(optional) Allow registering others

Enable this option if you want to allow users to register others in their own organization.

(only available with Allow registering others) Allow adding guest

Enable this option if you have functions for which this is appropriate.

Registration Class Determination

Specify the registration class method for pricing

- (default) Member type: Bases pricing on the registrant’s member type; if the member type is not set or found or the price is undefined, iMIS uses the default pricing.

- Member/Non-Member: Bases pricing on the registrant's member status, using the configured price; if the member or non-member price is not found or the price is undefined, iMIS uses the default pricing.
- Stored Procedure: Bases pricing on the registrant class returned by a stored procedure. Such stored procedures let you implement complex pricing promotions, such as 50% off additional registrants from a given company. If iMIS cannot find the stored procedure specified or if it fails, default pricing applies.

  Parameters – Your procedure must take one parameter but could take two. If your procedure takes one parameter, iMIS passes in the registrant ID only; if it takes two parameters, iMIS passes in the registrant ID and the event ID, in that order. Using both parameters lets you manage multiple events in the same procedure.

  Your stored procedure must contain all logic needed (including the Use Parent Company Pricing rules) to return a registrant class. Here is a simple stored procedure that uses both parameters and returns a specific registrant class:

```
CREATE PROCEDURE [dbo].[asi_TestGetRegistrantClass]
   @RegistrantId varchar(10),
   @EventId varchar(10)
AS
BEGIN
   SELECT case @EventId when 'SPRCONF' then 'M' else 'NM' END
END
```

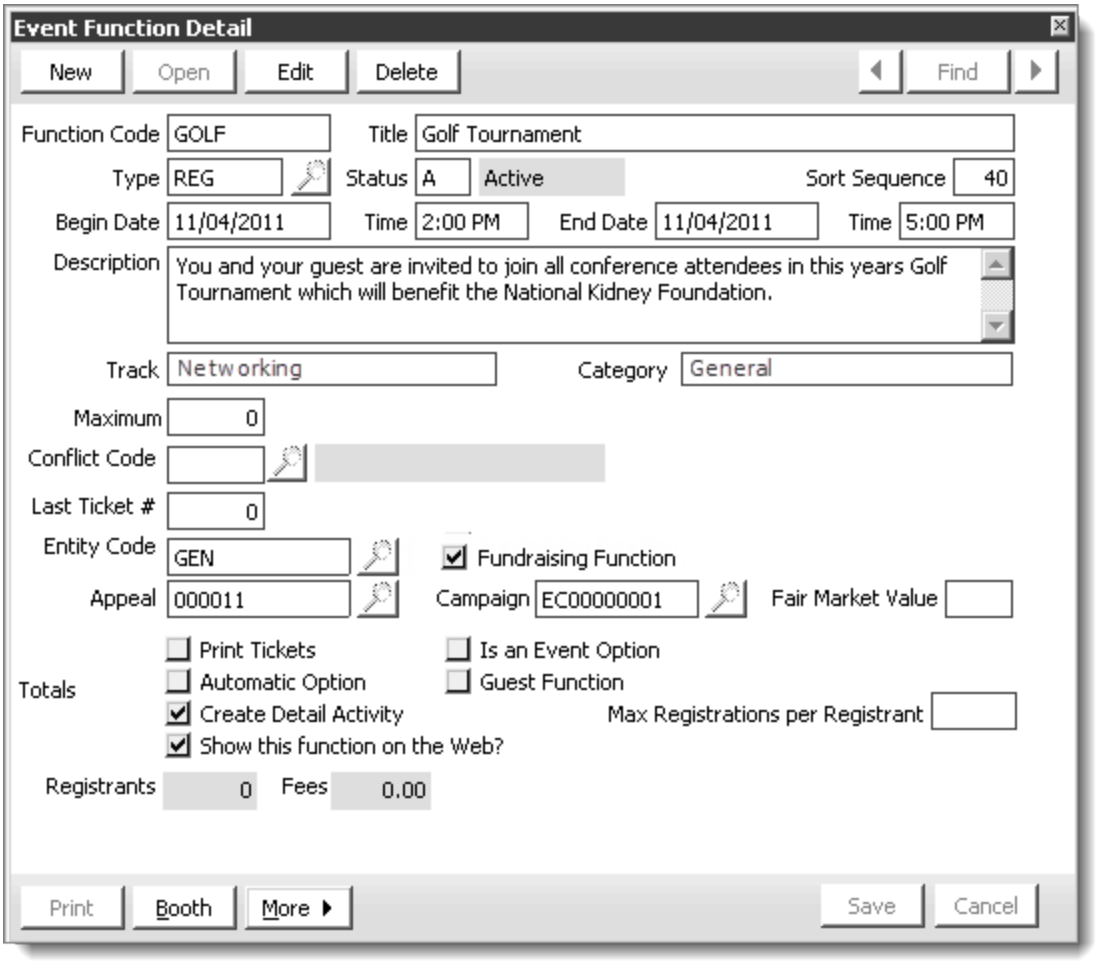
  Here is simple code to test this stored procedure:

```
exec asi_TestGetRegistrantClass '146', 'SPRCONF'
```

Event Function Detail window

Many of the details you define about an event, both required and optional, are maintained at the individual function level. An event function definition includes a general description

of the function, the location and schedule, the registration fee information including account and fundraising data, and optional room setup and planning details.



Admin Console: Home > Events > Define an event, double-click an event, select an event function, click Edit
Desktop: Events > Define an event, double-click an event, select an event function, click Edit

Function Code

Designates a unique code for the event function. You can use a combination of letters and/or numbers to represent the function (do not use spaces, apostrophes, quotation marks, forward slash (/), or dashes).

Title

Specifies a title for the event function. The title appears on all lists and reports that show individual event functions, such as confirmation letters, tickets, and detailed rosters. Maximum size: 60 characters.

Type

Specifies the event function type. The field defaults to REG for normal registrations. Use the lookup icon to find a function type.

- REG – This type is used for regular event registrations. It is displayed on the registration window, confirmations, and invoices.
- MEMO – This type is used when the function type should not be displayed on the registration window or be printed on invoices or confirmations. Tickets may be printed if this function is linked to a REG function.
- EX (iMIS Exhibition Management only) – This type is used for booth functions when processing exhibitor orders within the Exhibition Management system.

Status

Specifies an event function status code:

- A – Active (available for registration – default)
- P – Pending (still in planning stage)
- F – Frozen (currently unavailable for active registration, due to events such as registration currently occurring at the site)
- C – Closed (registrations no longer accepted)
- X – Canceled

Sort Sequence

This field specifies the sort sequence of functions that have the same start date and time (the first two sort criteria).

When used, this third-level sort function places functions with lower values ahead of those with higher ones: 1 sorts ahead of value 2, which sorts ahead of 3.

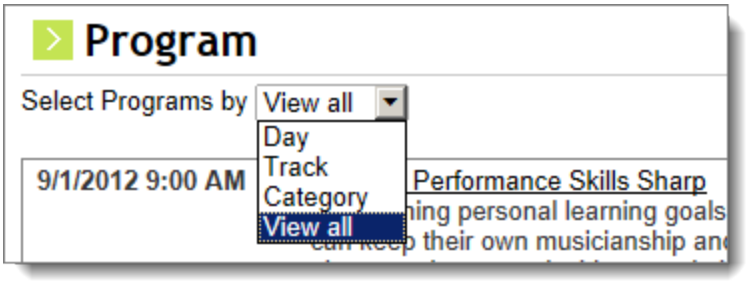
Note: Functions display by starting date, starting time, and sort sequence on the Define an event window and, initially, on the Register a customer window. If you later add functions for an existing registrant, those new functions will appear at the bottom of the list on displays and reports.

Begin Date

Specifies the beginning calendar date of the event function. If the function spans more than one day, enter the beginning date.

Track

(iParts only) Designates one or more terms, separated by semicolons, as being relevant tracks for this function. For example, if the function serves both managers and technologists, you might enter Management;Technical. You may leave this blank for some or all of your functions.



Track and Category entries allow registrants to view and collapse (hide) those groupings in the Event Program Display.

Category

(iParts only) Designates one or more terms, separated by semicolons, as being relevant categories for this function. For example, if the function targets both intermediate and advanced practitioners, you might enter Intermediate;Advanced. You may leave this blank for some or all of your functions.

Maximum

Specifies the total number of attendees for this function (for example, due to space limitations).

Taxable

(VAT taxation enabled) Designates that the function fees are taxable under VAT.

Tax Code

(VAT taxation enabled and Taxable enabled) Specifies the VAT tax code for this function's fee.

GST/HST

(Canadian taxation enabled) Specifies that the function fee is subject to General or Harmonized Sales Tax.

PST

(Canadian taxation enabled) Specifies that the function fee is subject to Provincial Sales Tax

Conflict Code

Designates an optional code used to label time slots or content areas to prevent scheduling conflicts. Registering for conflicting event functions will produce a warning message. Your administrator can set up conflict codes using a lookup/validation table.

Last Ticket

Specifies the number of the last ticket printed for this function, which is zero (blank) until tickets are printed.

Fair Market Value

Specifies the fair market value for the function if there is one.

Print Tickets

Specifies that tickets should be printed for this function.

Automatic Option

(optional) Specifies that new registrants will be registered for the function automatically.

Create Detail Activity

(optional) Specifies that a MEETFUNC activity record will be created for this function when the event is closed. The activity record is listed in the Activities-All tab in the history area of the Manage Customers window. The activity record is created only for the function registrants who are listed in the Event Roster window at the time the event is closed.

Is an Event

(iParts only) Specifies that the function appears as the event's overall registration option or, if you designate additional, as one of several Registration Options that registrants can choose from. iMIS prevents registration for the function until you define its pricing.

Limiting numbers of registrations: Enabling this along with a Maximum value, you can set capacity restrictions on the functions that you use for your event's Registration Options and have those capacities selectively prevent registration as they fill up, option by option. For example, you can have the Conference Workshops fill up while still permitting registration to the Conference itself. When the number of registrations for a specific Registration Option is met (or if pricing is not yet defined), users cannot register for that registration option, and they are prompted to select another option.

Guest Function

(optional) Specifies that the function allows guest registration. If this option and the Show this function on the Web option are enabled, the function will not show as a separate function on the web. Instead, it will show up as a guest type.

Show this function on the Web

Unused.(Displayed when you are licensed for e-Series and the Show this event on the Web option is checked on the Event Web Options window.

Max Registrations per Registrant

Unused.(Displayed only if Show this function on the Web is checked) Specifies the maximum number of function registrations a single online registrant can purchase, by governing the Qty drop-down list on the Event Registration page in e-Series.

Totals

- Registrants – Displays the total number of registrants for the given function. Canceled and canceled/transferred registrants are not included in these numbers.
- Fees – Displays the total of fees for current registrants for this function.

Booth

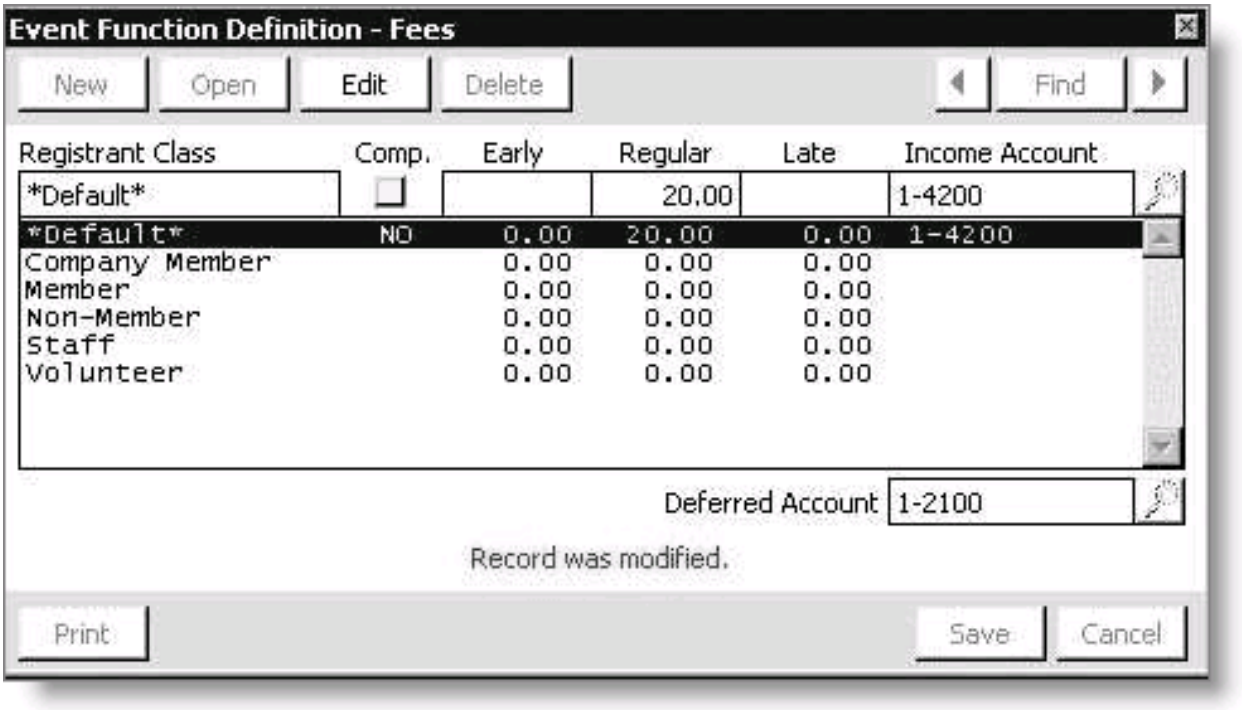
(Displayed when licensed for Exhibition) Opens the Booths window that enables you to generate a group of booths, add an individual booth, remove a booth, and import booths. See Exhibition Management for more information.

More

Displays the following drop-down menu items:

- Fees – Opens the Event Function Definition - Fees window.
- Plan – Opens the Event Function Definition - Plan window.
- CEU – Opens the Event Function Definition - CEU window. See Tracking Credits for Continuing Education for more.
- Speakers – Opens the Event Function Definition - Speakers window.
- Staff – Opens the Event Function Definition - Staff window.
- Links – Opens the Function Links window.
- Roster – Opens the Function Roster window.

Event Function Definition - Fees window



Admin Console: Home > Events > Define an event, open an event, open an event function, select More > Fees
Desktop: Events > Define an event, open an event, open an event function, select More > Fees

Registrant Class

Displays the registrant class selected from the list below the field. You have the option of charging different registration fees for different registration classes. If the Default registrant class is selected, all registrant classes will be charged the same registration fees.

Comp

Designates functions which are complimentary (free of charge) for one or more registrant class.

Early

Specifies the fee charged when a registrant places an order on or before the established Early Cutoff date as defined on the Define an event window.

Regular

Specifies the fee charged when a registrant places an order after the Early Cutoff date but on or before the Reg Cutoff date.

Late

Specifies the fee charged when a registrant places an order after the established Reg Cutoff date as defined on the Define an event window.

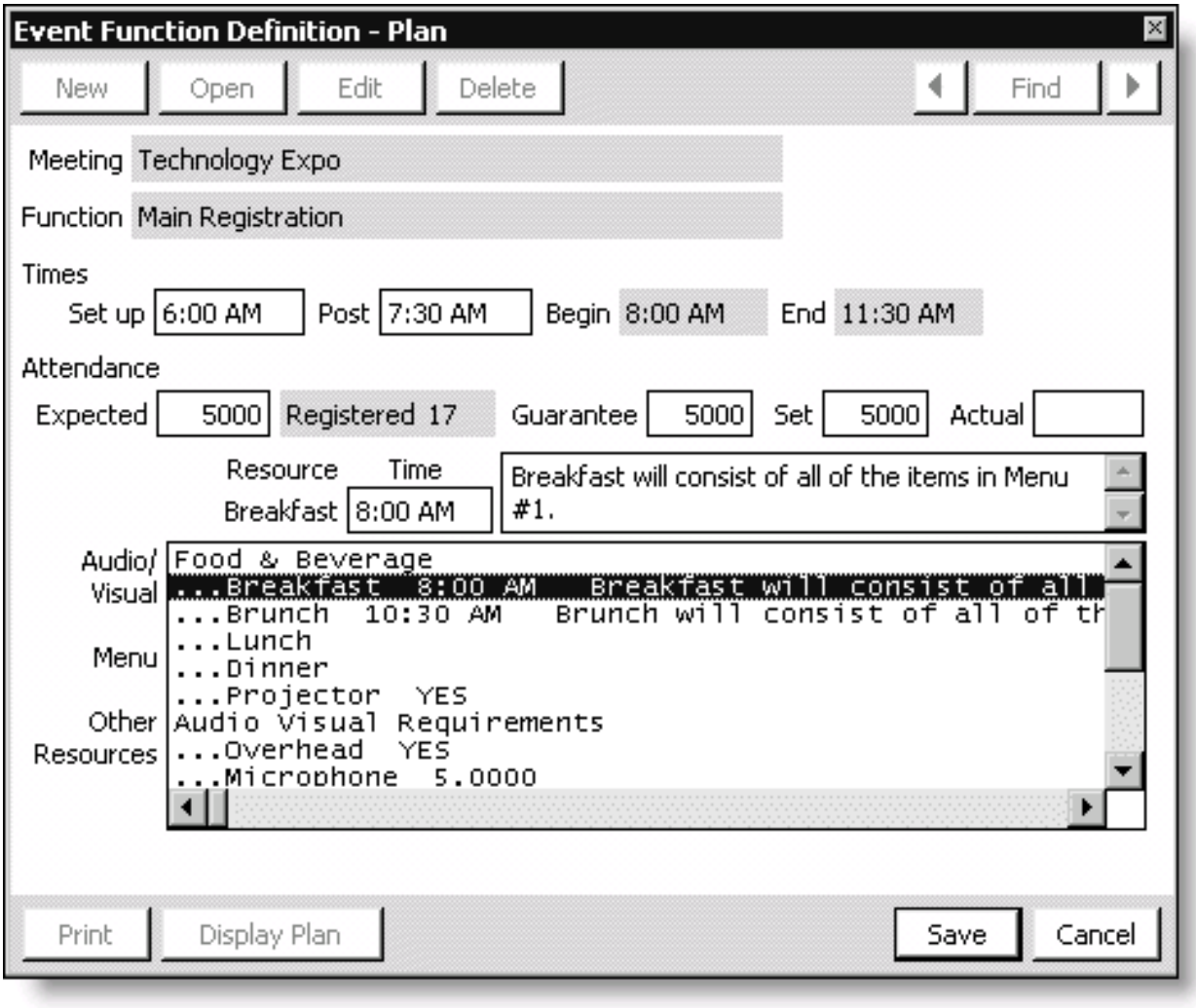
Income Account

Specifies the general ledger account number assigned to the function for this specific registrant class.

Deferred Account

Specifies the general ledger number that records the fee until it is transferred to earned income. (This field is visible only if you are licensed for Deferred Income)

Event Function Definition - Plan window



Admin Console: Home > Events > Define an event, open an event, open an event function, select More > Plan

Desktop: Events > Define an event, open an event, open an event function, select More > Plan

Meeting

Displays the event Title defined on the Define an event window.

Function

Displays the event function Title defined on the Event Function Detail window.

Times

- Set up – Specifies the time for room setup to begin. The format for entering time is [hour] (space) [minutes] (space) [pm]. For example, 7:15 a.m. would be entered as 7 15 (because the default is a.m.) and 2:00 p.m. would be entered as 2 pm..
- Post – Specifies the time for room setup to be completed.
- Begin – (read only) Displays the event function Begin Time from the Event Function Detail window.
- End – (read only) Displays the event function End Time from the Event Function Detail window.

Attendance

- Expected – Specifies the number of registrants expected to attend the function.
- Registered – (read only) Displays the total number of function registrants from the Event Function Detail window.
- Guarantee – Specifies the total number of attendees you guarantee will attend the function.
- Set – Specifies the total number of attendees for which the room should be set or arranged.
- Actual – After the function is complete, Specifies the actual number of attendees.

Resource

- Title – (read only) Displays the resource's title when a resource is selected from the Resource list.
- Qty – (Displays only if enabled for the resource in the Set up event resources window (from Events, select Set up tables > Event resources)) Specifies the number of the selected resources needed.
- Time – (Displays only if enabled for the resource in the Set up event resources window) Specifies the time the resource will be needed.

- Check Box – (Displays only if enabled for the resource in the Set up event resources window) Enable to indicate that a projector will be needed for the function.
- ID – (Displays only if enabled for the resource in the Set up event resources window) Displays the resource ID number.
- Text – (Displays only if enabled for the resource in the Set up event resources window) Specifies any applicable note for the resource.

  Resources

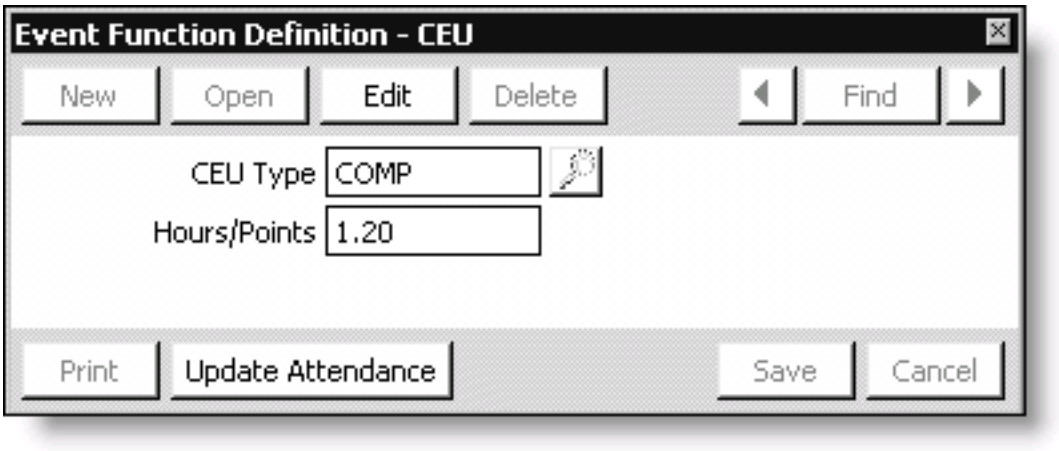
  Lists the resources defined in the Set up event resources window.

  Display Plan button

  Used to display the Room Setup Report.

Event Function Definition - CEU window

The Event Function Definition - CEU window enables you to record education credits to be awarded to function attendees. Because CEU data is managed at the function level, you easily can track multiple functions for the same event.



Admin Console: Home > Events > Define an event, open an event, open an event function, select More > CEU
Desktop: Events > Define an event, open an event, open an event function, select More > CEU

Note: You can access the Event Function Definition - CEU window only if the CEU Name field is populated on the Customer Setup - Advanced window. The entry in the CEU Name field is shown on the Event Function Detail window's More menu.

CEU Type

Designates the continuing education category of the course. Valid codes are defined in a lookup table according to the following rules:

If you are not licensed for Certification, you must create and populate the CEU_TYPE general lookup/validation table (see "Events: Set up tables") to use the lookup and validation features of this field.

If you are licensed for Certification, lookup and validation of this field is performed against types defined in Certification. You can also use the CEU_TYPE table in combination with Certification types. In this case, codes are listed alphabetically when using the lookup function.

Note: If a CEU code appears both in Certification and in the CEU_TYPE table, the code from Certification is used.

This field's prompt can be customized on the Customer Setup - Advanced window.

Hours/Points

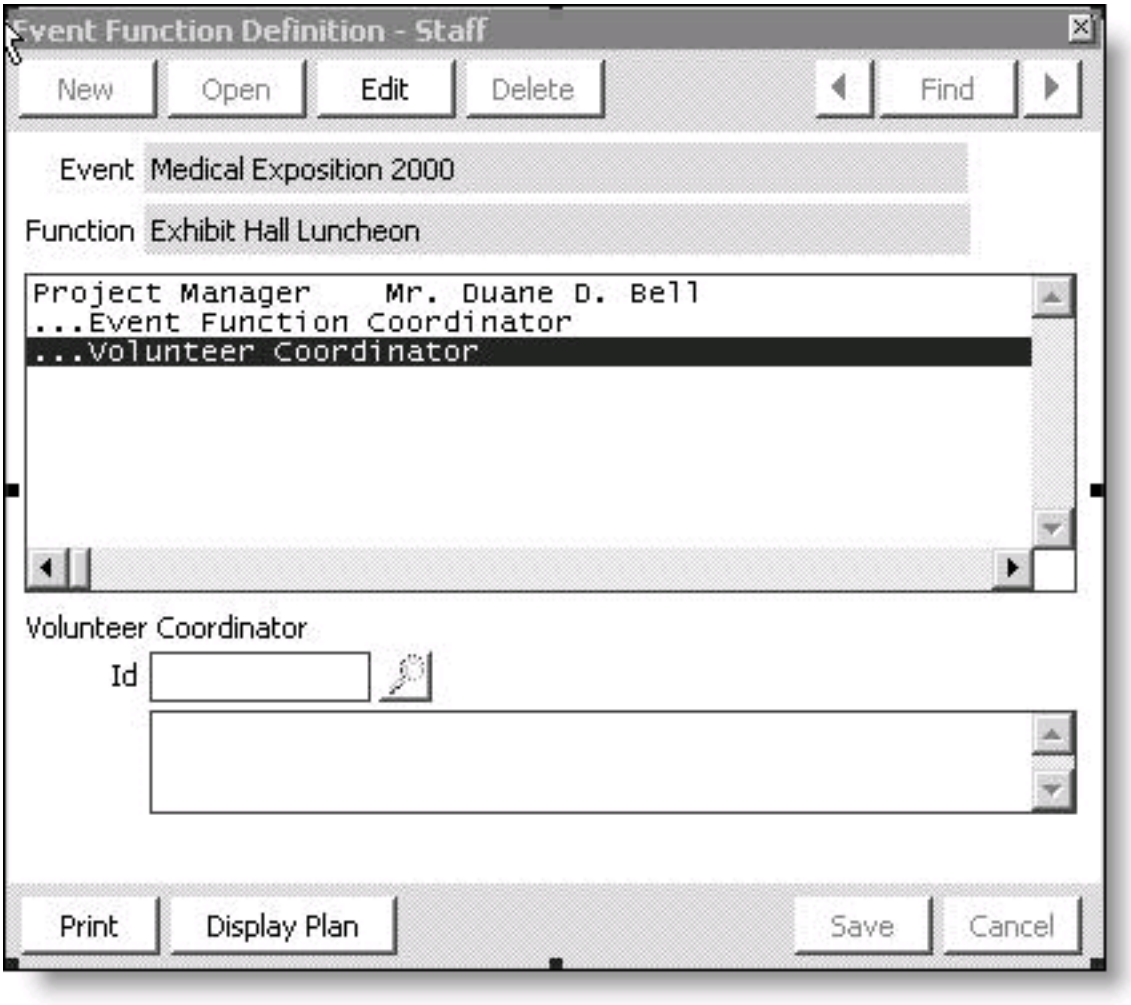
Specifies the number of units or hours to be awarded for attending the course.

This field's prompt can be customized on the Customer Setup - Advanced window.

Update Attendance

Opens the Function Attendance window used for awarding CEU hours/points.

Event Function Definition - Staff window

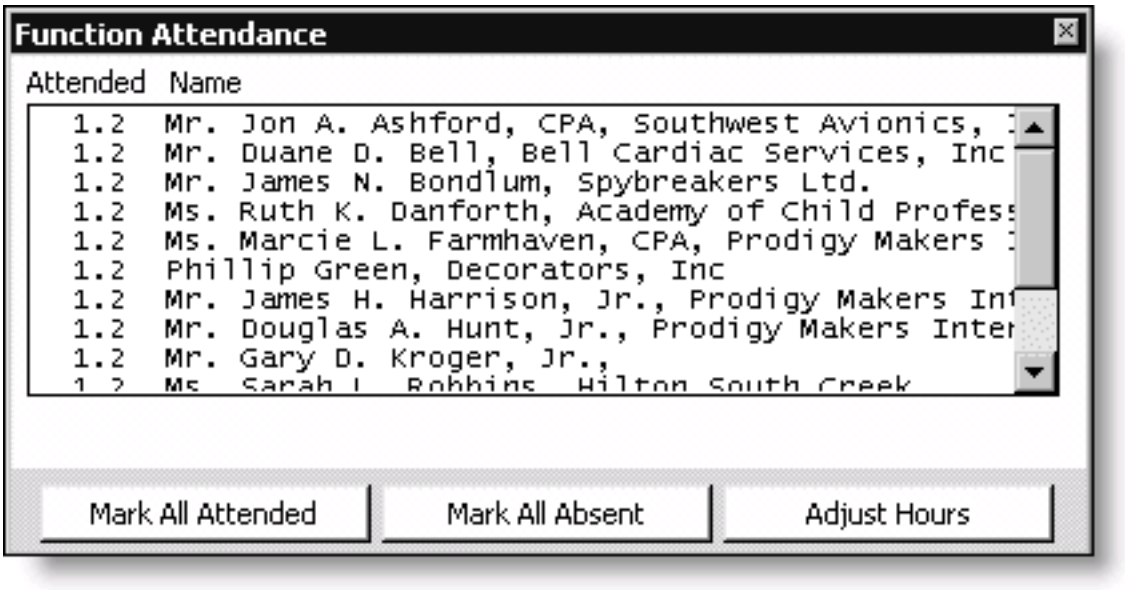


Admin Console: Home > Events > Define an event, open an event, open an event function, select More > Staff

Desktop: Events > Define an event, open an event, open an event function, select More > Staff

Function Attendance window

The Function Attendance window displays a list of non-canceled registrants for a selected function and is used for awarding CEU hours/points.



Admin Console: Home > Events > Define an event, open an event, open an event function, select More > CEU, click Update Attendance
Desktop: Events > Define an event, open an event, open an event function, select More > CEU, click Update Attendance

Mark All Attended

Changes the attendance status for all individuals on the roster to “Attended.”

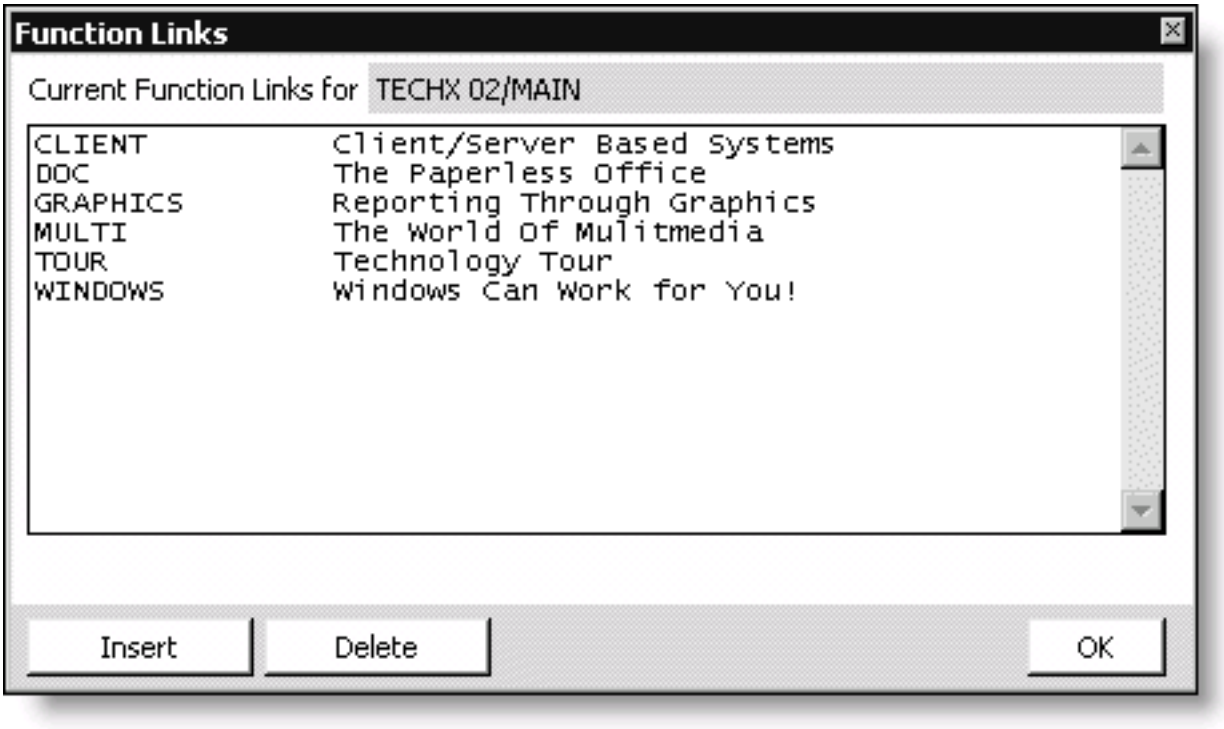
Mark All Absent

Changes the attendance status for all individuals on the roster to “Absent.”

Adjust Hours

Adjusts the default credit hours set for this function.

Function Links window



Admin Console: Home > Events > Define an event, open an event, open an event function, select More > Links
Desktop: Events > Define an event, open an event, open an event function, select More > Links

Current Function Links for

Displays the primary event function name.

Function Links

Lists the secondary event functions that are linked to the primary function.

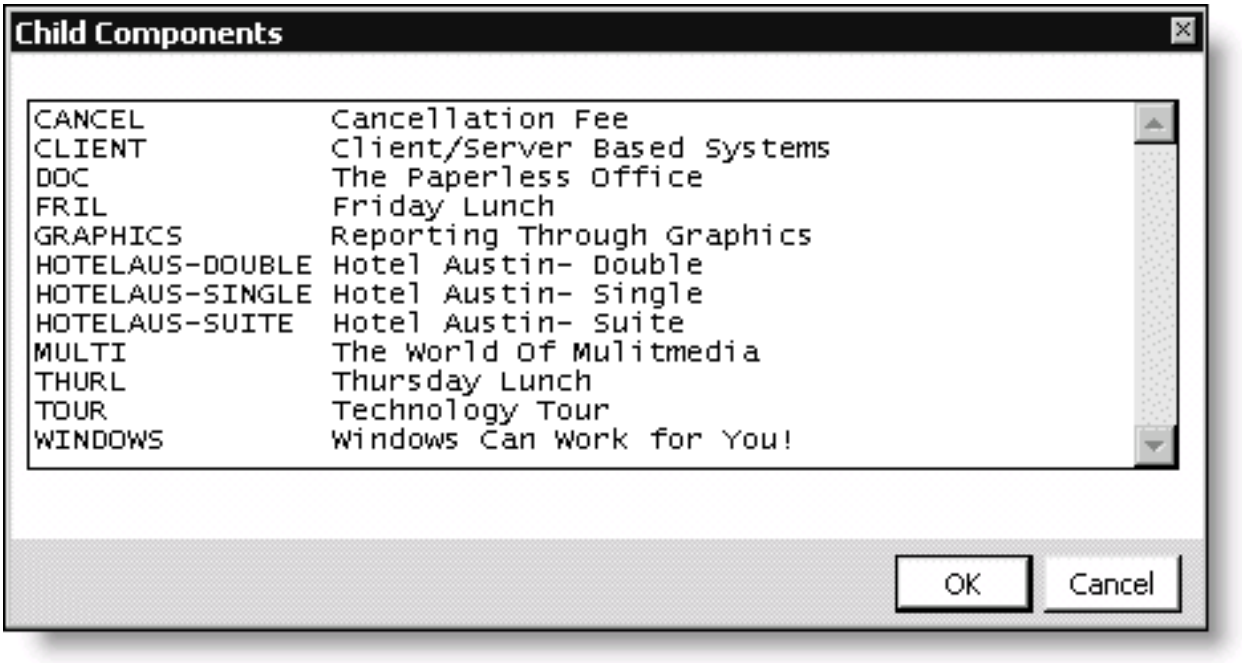
Insert button

Opens the Child Components window. The Child Components window lists all of the secondary event functions.

Delete button

Used to disable a linked secondary event function.

Child Components window



Admin Console: Home > Events > Define an event, open an event, open an event function, select More > Links > Insert

Desktop: Events > Define an event, open an event, open an event function, select More > Links > Insert

Secondary Functions

Lists all of the secondary event functions that are not linked to the primary event function.

Hotels window

Admin Console: Home > Events > Define an event, open an event, click Hotels

Desktop: Events > Define an event, open an event, open an event function, click Hotels

Hotel Code

Lists defined hotel codes.

Event

(read only) Displays the event code and event name.

Hotel Code

Specifies a code for the hotel.

Id

Specifies the hotel's ID (applicable only if you created a record for the hotel in the Manage customers window).

Class

Specifies a class for the hotel.

Contact

Specifies the contact for the hotel.

Title

Specifies the hotel contact's title.

Hotel Name, address fields

Specifies the name and address of the hotel.

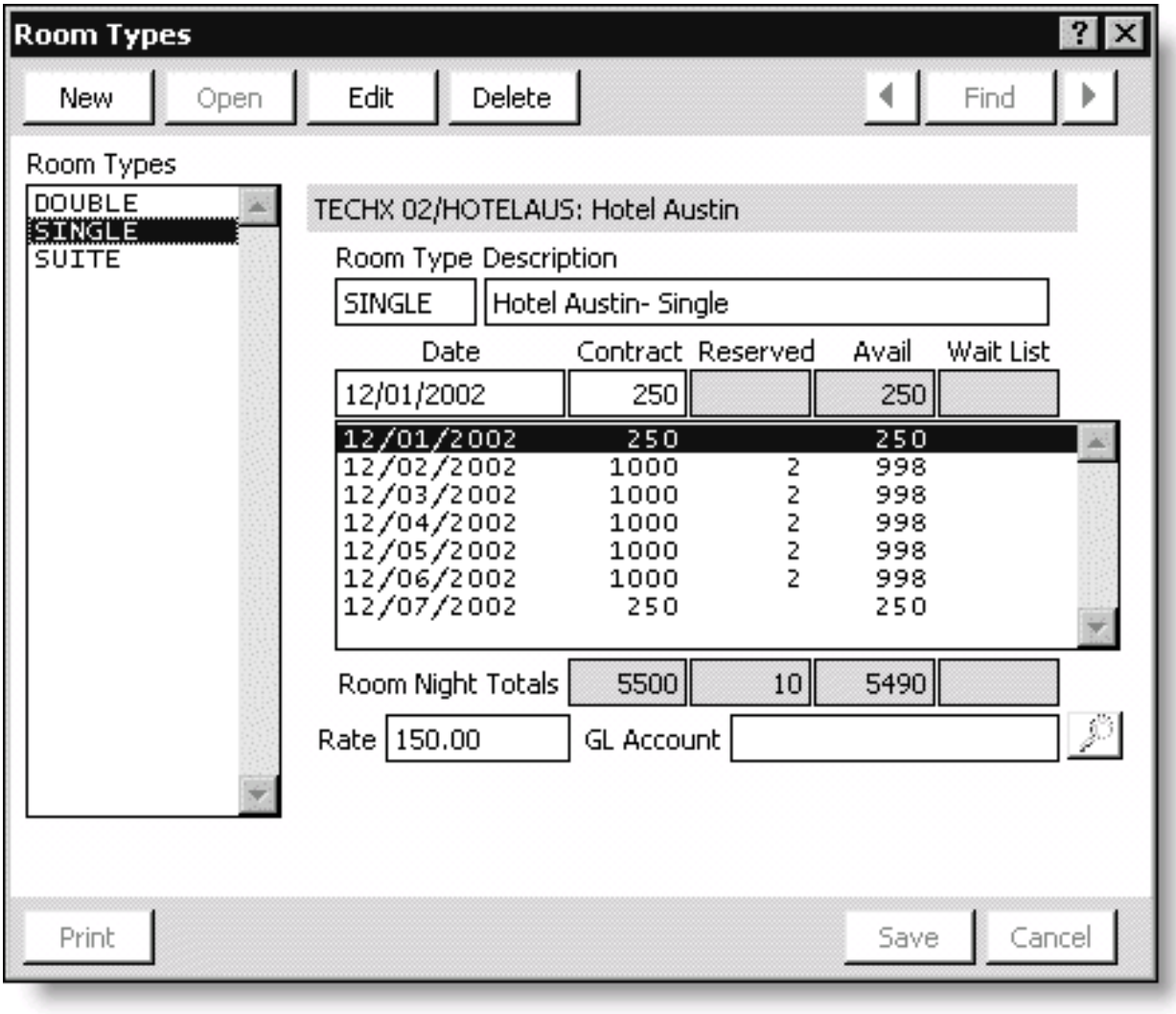
Availability button

Opens the Hotel Availability window used for determining room availability.

Rooms button

Opens the Room Types window used for setting up hotel rooms.

Room Types window



Admin Console: Home > Events > Define an event, open an event, click Hotels, and click Rooms

Desktop: Events > Define an event, open an event, click Hotels, and click Rooms

Room Types

Lists defined room types.

Event

(read only) Displays the event code and name of the event.

Room Type

Specifies a code for the room type.

Description

Specifies a description for the room type.

Date

Specifies a reservation date.

Contract

Specifies the number of hotel rooms contracted for the event.

Reserved

(read only) Displays the number of hotel rooms that have been reserved.

Avail

(read only) Displays the number of contracted hotel rooms that have not been reserved and are still available.

Wait List

(read only) Displays the number of registrants on the wait list for rooms.

Room Nights

(read only) Displays a summary of the number of Contract, Reserved, Avail, and Wait List rooms for each Date.

Room Night Totals

(read only) Displays the total number of Contract, Reserved, Avail, and Wait List rooms.

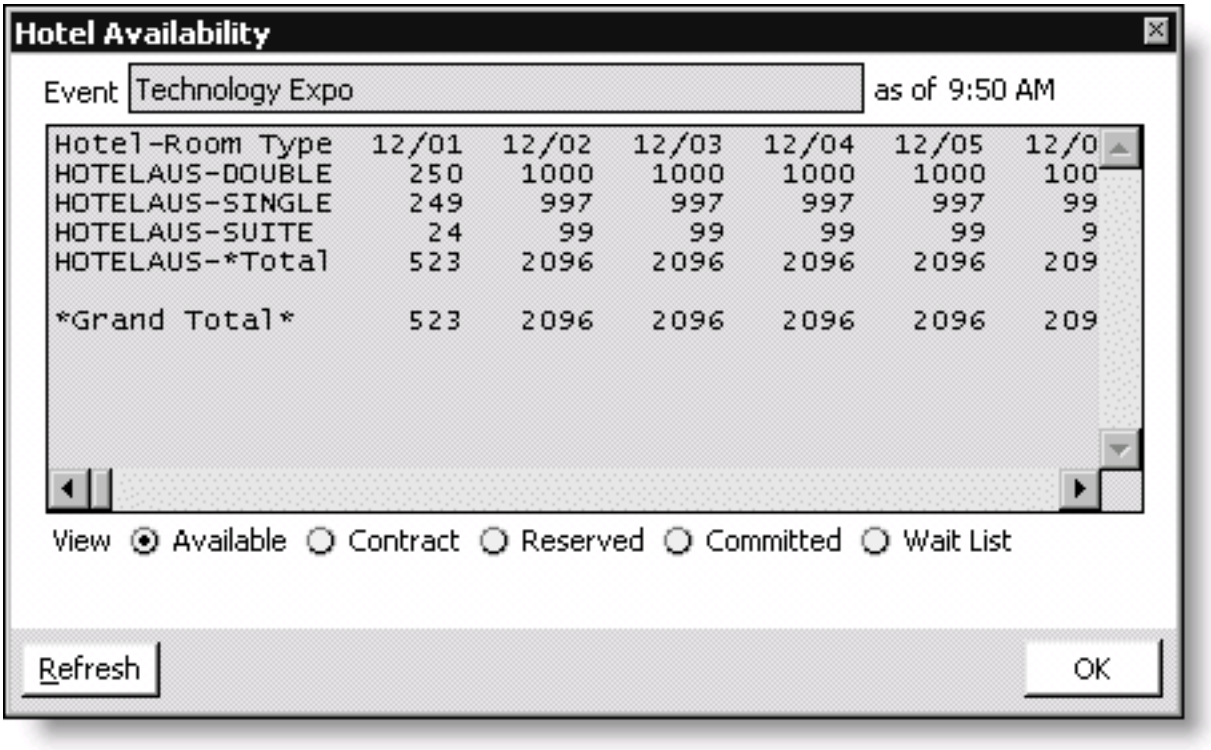
Rate

Specifies the daily hotel room rate.

GL Account

Specifies the GL account for the hotel charges (use the lookup icon to search for an account number).

Hotel Availability window



Admin Console: Home > Events > Register for an event, select the Other tab, and click Available
Desktop: Events > Register a customer, select the Other tab, and click Available

Event

(read only) Displays the name of the event.

Time

(read only) Displays the time the window was last updated. Selecting Refresh updates both the window and the time.

Hotel Rooms

(read only) Displays the available hotel rooms by room type.

View

- Available – Enable to view the total number of rooms available.
- Contract – Enable to view the total number of rooms contracted for the event.

- Reserved – Enable to view the total number of rooms that have been reserved.
- Committed – Enable to view the total number of rooms for which registrants have committed their registrations. (Committed is the amount of the Contract "committed" to open orders. The Committed quantity mirrors the Reserved quantity but cannot exceed the Contract quantity. The difference between the Reserved and Committed quantities equals the backorder quantity.)
- Wait List – Enable to view the total number of registrants on a wait list for the rooms.

Refresh button

Click to update the data.

Room Sharing window

Admin Console: Home > Events > Register for an event, select the Other tab, and click Sharing

Desktop: Events > Register a customer, select the Other tab, and click Sharing

Share Status

- Not Sharing – Enable if the registrant is not sharing a room.
- Wants to Share – Enable to indicate that the registrant wants to share a room with another registrant.
- Sharing – Enable to indicate that the registrant is sharing a room with another registrant.

Primary Room Holder Registration Number

Specifies primary registrant's registration number. Use the lookup icon to search for the registration number.

RoomMates

Lists all of the registrant's roommates.

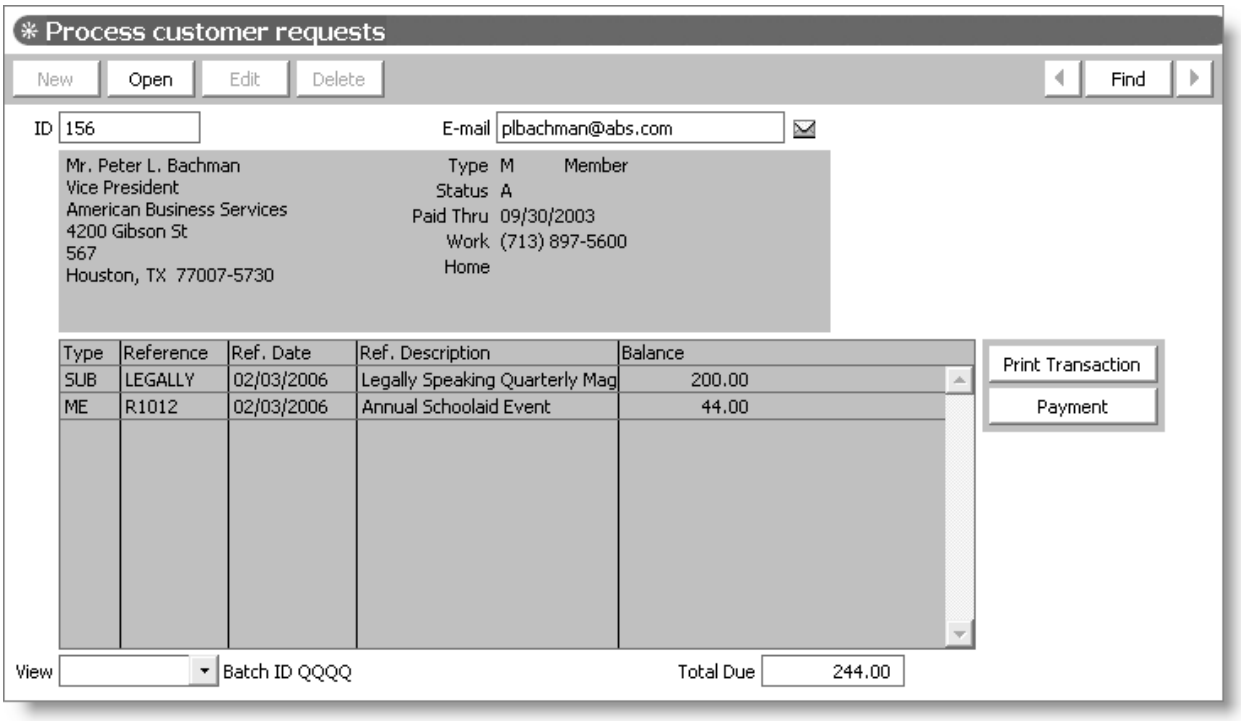
Customer Service

The Customer Service area allows your staff to process event registrations, orders, fundraising gifts and pledges, and payments. In addition, your organization can sell products and services from various areas and apply payment for the products or services with a single check or credit card transaction.

Process customer requests

The Process customer requests window allows you to process and complete orders and transactions. After you open a customer’s record in the Process customer requests window, that record will automatically display in all the Customer Service windows.

Process customer requests window



Admin Console: Home > Customer Service > Process customer requests
Desktop: Service Central > Process customer requests

ID

This field specifies the customer identification number.

E-mail

Displays customer's e-mail address.

Message (envelope)

This icon opens the Confirmation of Transaction – Summary – Message (e-mail) window where you can send a Transaction Summary. You must select Current Batch from the View drop-down list.

Print Transaction

This button sends the Transaction Summary report to the user's designated location (for example, Screen or Printer). It is available in the Current Batch view if you are using the

Batch Control option. You must select the batch that contains transactions for the selected customer.

Payment

This button opens the Payment Entry window. By default, the Pay Amount field auto-populates with the total amount due for any unpaid open item(s) and each open item displays with the order type, date, description, and balance due with the Pay option auto-selected for each item.

Type

Displays the source module or the transaction type.

Reference

Displays a number the system assigns to the transaction.

Ref Date

Displays the date the referenced transaction occurred.

Ref Description

Displays a description of the referenced transaction.

Note: A detailed description displays for Orders (OE) if your administrator has enabled 1st Line Desc. on Statement in the AR/Cash module. If this option is not enabled, only the transaction name, Order displays in this field.

Balance

Displays the amount the customer owes for the referenced transaction.

View

Specifies which requests are shown for the current customer ID:

- All – Shows all customer requests for the specified customer ID.
- Outstanding – Shows only outstanding customer requests for the customer ID.
- Current Batch – Shows only requests in the current batch for the customer ID.

Total Due

Displays the total amount (balance) of all line items displayed.

Enter dues payments

To enter a dues payment

1. From Enter dues payments window, click New.
2. (optional) Override the Transaction Date, if necessary.
3. Enter the customer ID. If you do not know the customer ID, select the lookup icon in the ID field to look up the customer in the database. The window displays any line items associated with the customer ID and the total outstanding balance.
4. Enter the Source Code that prompted this payment and press Tab.
5. Enter the check number or credit/debit card code and press Tab. For credit/debit cards, enter the required card information.
6. Enter the amount of the payment in the Pay Amount field and press Tab.

   The payment amount is applied automatically to each open line item, beginning with the main customer dues product. As full payment is applied to a line item, the Paid Thru date field advances to the end of the bill term or beyond.

   Note: Complimentary or zero dollar items can be denoted by an asterisk (*) on the Enter and edit payments window. The Paid Thru date advancement for complimentary billing items billed through Create Invoice follows the rule established by the billing cycle that is selected on the Process billing window. To update the Paid Thru date for zero dollar items, double-click the line item.
7. Click Save. Verify that the payment information is updated on the Billing tab.

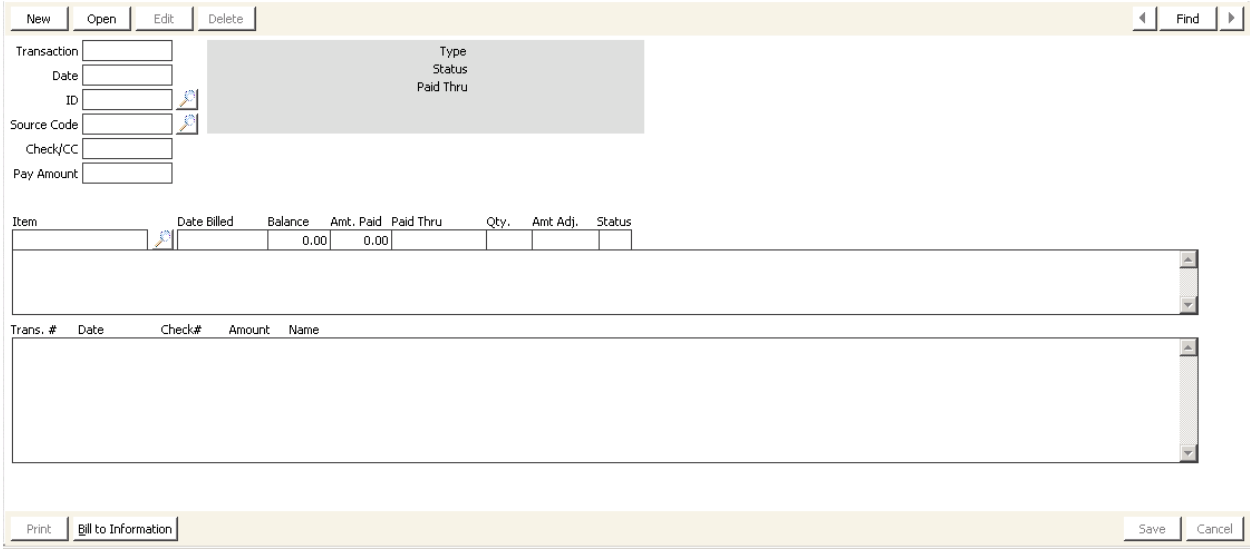
   To apply payment to a different line item

   The Enter dues payments window automatically applies the lump sum amount paid to the open balance line items in product payment priority order. Occasionally, the payment may need to be applied to line items other than the ones the payment window

automatically selects. To apply a dues payment to a different line item, perform the following:

1. From Enter dues payments, click New.
2. Enter the customer ID and press Tab.
3. Enter the payment information. The payment amount is applied automatically to the open (positive) line items according to the payment priority rankings assigned to each product code (from lowest to highest). In the following example, iMIS applied $20 to the Journal Subscription.
4. Double-click the line item to remove the amount paid (in this example, the Journal Subscription line item). You can manually override the amount applied to a line item by selecting the line and entering the desired amount in the Amt Paid field.
5. Double-click the line item where the payment should be applied (for example, PAC Contribution).
6. Click Save.

Enter dues payments window



Admin Console: Home > Customer Service > Enter dues payments
Desktop: Billing > Enter and edit payments

Register for an event

To register a customer for an event

1. From Register for an event window, click New.

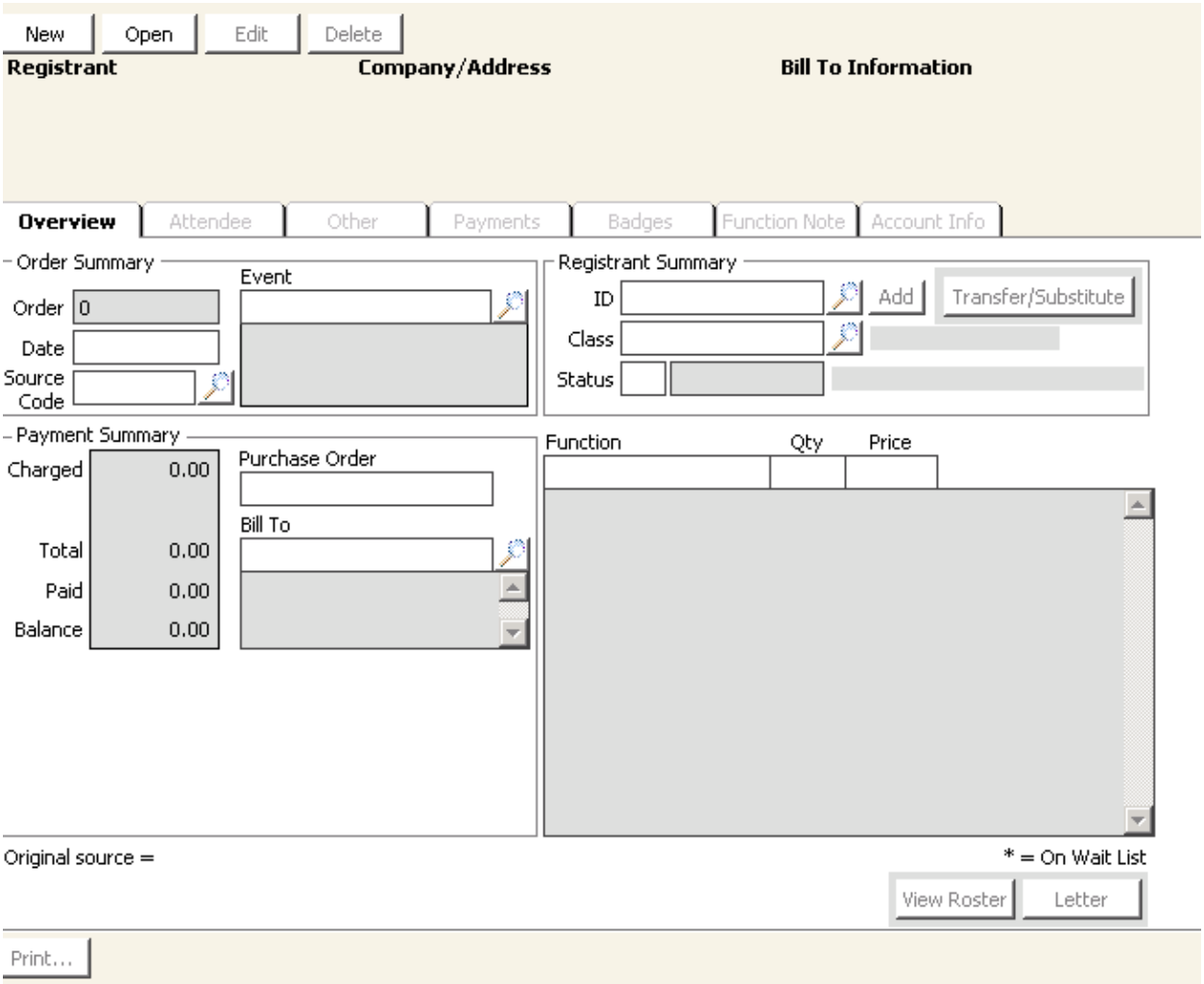
- If you already have an ID selected, it automatically populates the ID field.
- Otherwise, enter or look up a customer ID.

2. Click Save.
3. From Customer Service, select Process customer requests.

   The event registration (ME) is a new line item on the Process customer requests window. The system keeps a running total of the Balance field in the Total Due field.

   Note: You can double-click on any line item on the Process customer requests window to view and edit data specific to that item. For example, if you double-click the ME (event) Type line item, the Register a customer window displays with the event the customer requested. You can also edit the registration by deleting a line item or adding another function.

Register for an event window



Admin Console: Home > Customer Service > Register for an event

Desktop: Service Central > Register a customer

Enter and edit orders

To enter an order

1. From Enter and edit orders window, click New.
2. Accept the default Order Type, or change it by clicking the lookup icon to select a type or by entering a value.

3. Press Tab and continue to enter the order information.
4. Click Save.

Scenario: To process an order and event registration

Scenario: A current customer calls to purchase two sets of customer labels and would like to register for an annual event. The customer is paying by credit card and needs a receipt. This requires you to:

- Use the Process customer requests window to place an order and register a customer for an event,
- Apply a single payment for two open items using a credit card,
- Print and/or electronically mail a receipt, called a Transaction Summary.

1. From Enter and edit orders window, select New.
2. Enter the Order Summary information.

- Order Type - use the lookup icon to select a value, type an entry, or leave the default entry (if any) as it is. Press Tab to accept the value and move to the next field.
- Bill to ID - type in or use the lookup icon to select an ID.
- Order Date - accept the default or override if necessary.

  Note: The Order Date defaults to the batch date if you use batch control; otherwise, the date defaults to the system date.
- Purchase Order - enter a purchase order number if necessary.
- Source - Enter a code or click the lookup icon to select a value.
- Shipping Method - (optional) Override the default shipping if necessary.
- Tax Authority - (optional) Override the default tax authority if necessary.

3. Enter General order information.

- Terms - (optional) Override the default payment Terms if necessary.
- Discount - (optional) Enter a percentage discount for the order in the % Discount field.
- Priority - (optional) Enter a backorder Priority for the order.

4. Enter a Product.

- Product - Enter a code and press Tab.

  Note: Click the lookup icon to open the Product Find window where you can look up and select a product.

- Description - the field is populated automatically.
- Quantity - (optional) Enter the Quantity.
- Price - (optional) Edit the product Price if necessary.
- % Disc - (optional) Enter a percentage discount for the product in the % Disc field.

  Note: Entering a product-level discount in the % Disc field overrides any order-level discount entered in the % Discount field. However, product-level discounts are applicable only for a given product and do not affect entire order-level discounts.

- Press Tab to add the product to the order. The product is displayed in the list of Product Line Items, and your cursor is moved to the Product field.

5. Enter additional products.
6. Click Save.
7. From Service Central, select Process customer requests. Notice that the order (OE) you just processed is now a line item on the Process customer requests window.

   Note: You can click and drag the vertical lines between items on the Process customer requests window so that you can see all the information in a column.

Enter and edit gifts

Where you process fundraising gifts and pledges depends on their type. You must pay single gifts through the Fundraising Enter and edit gifts window, but you can pay Single Pledge and Installment pledges through the Customer Service Enter and edit gifts window.

A pledge is a contribution that will be paid at a later date. A pledge can be either a single pledge or an installment pledge. For example, a customer might pledge $1,000, which they agree to pay at a particular date in the future, either in one payment (single pledge) or in a series of predefined payments (installments). You can customize the amount and the payment schedule.

You can also process acknowledgements, member tributes, split gifts, and setup an installment pay plan for pledges.

To enter a single gift or pledge (Customer Service)

Payments for single gifts must be made at the time the gift is entered. You can pay for a single gift by entering a check number, credit card number, an in-kind non-cash asset account (if you are entering an in-kind or asset contribution), or by applying an open credit.

A pledge is a donation to be paid at a later date and can be a single pledge or an installment pledge.

Note: In-kind contributions can only be made for gifts. iMIS Fundraising does not track single in-kind pledges or installment in-kind pledges.

1. From Enter and edit gifts window, click New.
2. Enter the donor ID, or click the lookup icon to select an ID. The donor's name and address information display in the Donor and Address areas.
3. Enter the date the gift was received in the Date Received field. The default is the batch date if batch control is enabled, or the current system date if batch control is not enabled.
4. Select Single Pledge or Single Gift from the Gift Type drop-down list.

5. Enter the total amount of the donation in the Gift Amount field.
6. Enter the Request, Distribution, Appeal, Campaign, and Fund information as necessary.
7. (optional) Enter the List as name.
8. (optional) Enter the Solicitor ID, or click the lookup icon to select a solicitor ID.
9. (optional) If there is an individual partially responsible for this donation who is not the donor, enter the Soft Credit ID, or click the lookup icon to select a soft credit ID.
10. For Single Gifts only:
    - Enter the payment information in the Check #/CC/In-kind/Asset field and its related fields as appropriate.
    - (optional) Enter a manual receipt number in the Receipt Number field.
    - (optional) Enable the Do not Print Receipt option to skip the printing of a receipt for this gift.
11. Click Save.
12. From Process customer requests window, select Process customer requests. The gift or pledge you just entered will be shown.

    To process an installment pledge

    Scenario: A customer wants to make an installment pledge for $1000 to be paid in monthly installments.

    Note: If you select an installment pledge; select a down payment; and the customer is paying by credit card, only the installment down payment is charged to the credit card. The remaining installments populate on the Process customer requests and Payment Entry windows for payment at a later date.

    The credit card is not automatically billed monthly.

You do not have to click the down payment option, if the customer is paying with cash or check at a later date. Individual installments for a pledge populate on the Central Processing and Payment Entry windows until paid.

1. From Process customer requests window, click Open and enter the donor ID.
2. From Enter and edit gifts window, click New.
3. Select Installment from the Gift Type drop-down list. The Payment Info area of the window is grayed out because a pledge means that the money will be paid at a later date.
4. Enter the Total Amount of the installment pledge.
5. Enter the Distribution or income account where the pledge will be credited or, click the lookup icon to select a value.

   Note: Although you predefined the Distribution, you can override the value by manually entering a different combination of a fund, appeal, or campaign if your setup allows.
6. (optional) Enter the Appeal code and Campaign code if there is one associated with the pledge, or click the lookup icon to select a value.
7. Enter the Fund code associated with this pledge, or click the lookup icon to select a value.
8. Enter a credit card code in the Check #/CC/In-Kind/Asset field and complete the credit card information.
9. Click the Installments tab and specify the installment details:
10. Click the Installment Frequency from the drop-down list.
11. Click to enable Pay a downpayment. The down payment amount displays under the Prepay column.

    Note: If the customer is making a credit card payment, you must select Pay a downpayment or when you return to the Enter and edit gifts window and you click Save, a message informs you that you must first select the Pay a downpayment option.
12. Click Save.

Enter and edit payments

To apply a credit card payment to outstanding items

Note: You are still processing request(s) for the same customer.

1. From Enter and edit payments window, click Open and enter the transaction information to display the order.

   Note: All line item checkboxes are selected (check in Pay column) for payment except Fundraising (FR) and credit balance line items.

2. Enter the payment information.
3. Click OK to apply the Pay Amount to all selected items.

To apply a specified payment amount to all unpaid items

1. From Enter and edit payments window, click New.
2. Enter an Id and press Tab to populate the Payment Entry window, or click the lookup icon on the Id field to select a customer record.
3. Enter a check number or credit/debit card code in the Check/CC field and enter the required card information.
4. Enter a dollar amount equal to the Unpaid Balance and press Tab in the Pay Amount field. Notice the Pay Amount, Unapplied Amount, and Unpaid Balance fields are equal because no line items have been selected for payment.
5. Click the checkbox in the Pay column to select the line item(s) where payment will be applied.
6. Click Save to update the customer's record with the payment.

To select open items for a payment

1. From Enter and edit payments window, click New.

2. Enter an Id, or click the lookup icon on the Id field.
3. Enter a check number or credit/debit card code in the Check/CC field and enter the required card information. Do not enter any information in the Pay Amount field.
4. Click the checkbox in the Pay column for each line item that you want to select for payment.

   Note: The Pay Amount field increases by the line item amount as you select each line item. If you select the wrong line item, click to deselect (uncheck) the checkbox.
5. Click Save.

   To apply a payment to multiple items using Auto-apply

1. From Enter and edit payments window, click New.
2. Enter an Id and press Tab to populate the Payment Entry window, or click the lookup icon on the Id field to select an ID.
3. Enter a check number or credit/debit card code in the Check/CC field and enter the required card information.
4. Enter the amount of the check in the Pay Amount field.
5. Click Auto-apply. The Pay Amount is applied to the oldest line items first. Open Dues (SUB) items have the highest priority.

   Note: Auto-apply does not automatically select Fundraising items for payment, you must manually select them.
6. Click Save.

   To pay for an order and a registration with one credit card payment

   If you have added an event registration (ME) and placed an order (OE) for the active contact, you need to process only one credit card payment for the two open line items (ME and OE).

1. From Enter and edit payments.

- All transactions processed for this customer display when All is the View on the Process customer requests window.
- The line items listed on the Process customer requests window are listed on the Enter and edit payments window for the Current Batch, if any.
- By default, items entered during the current session (except Fundraising and credit balance line items) are checked for payment when you open the Payment Entry window from the Process customer requests window. You can deselect any item and apply a partial payment.

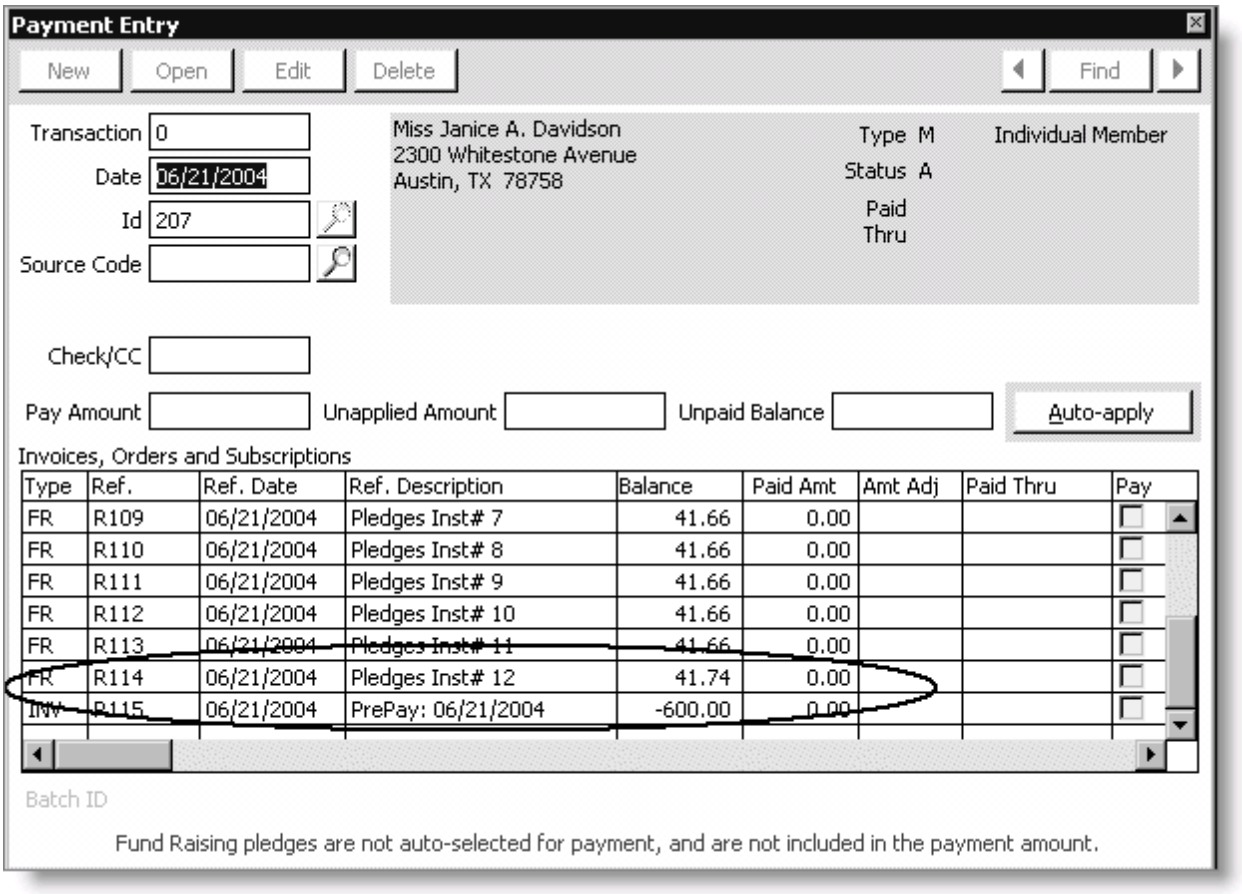
2. Enter a credit/debit card code in the Check/CC field and complete the customer's card information.
3. Click Save to apply the Pay Amount to the checked items.
4. Close the window to return to the Process customer requests window, which now shows the line items with a zero balance.

Applying a Credit Balance to a Specific Item

A credit balance is an overpayment that occurs when a customer unknowingly sends in too much money to pay an Unpaid Balance. You can apply an open credit balance in Service Central by selecting Process customer requests, and clicking Payment.

Note: Do not create credit and debit memos using the Service Central module; perform credit and debit memos only in the AR/Cash module.

Note: Overpayments (credit balances) to Fundraising items are not recommended. Apply these overpayments to the Pre-Pay line. A message stating this appears at the bottom of the Payment Entry window.



Example of a credit balance line item

Scenario: A customer calls and places an order that is processed through the Process customer requests window. Now the customer wants to pay the Unpaid Balance. The customer has an open credit balance. When you open the Payment Entry window from the Process customer requests window, all items except the credit balance are automatically selected (checked) for payment. The Pay Amount has been generated to equal the amount of all selected line items (except Fundraising line items).

To apply a credit balance through the Process customer requests window

1. From Enter and edit payments window, click Open.
2. Open the customer's transaction record.
3. Select the credit item by clicking the Pay checkbox. This applies the credit to all items that

were automatically selected for payment.

4. Click Save.

   Note: If you only select the open credit line item for payment or multiple open credit line items, when you click Save to apply the credit, a message displays informing you that you have only selected credit items for payment. Click No to select more unpaid items for payment, or click Yes to have the system apply the credit.

   To apply a credit balance using Auto-apply

   A customer sends a check to make a partial payment on an unpaid balance. The customer has an open credit balance. In this scenario, you would open the Payment Entry window from the Service Central menu.

   When you open the customer record, no line items are selected for payment. You will enter a check number and the amount of the check. To apply the open credit, select the credit line item by checking the box in the Pay column.

   The amount of the credit is added to the Unapplied Amount and the Pay Amount is not affected. If you press the Auto-apply button, the entire Unapplied Amount (including the Pay Amount and credit) is auto-applied to the Unpaid Balance in order of priority.

   Note: Fundraising line items (FR) are not paid using Auto-apply.

   From Manage customers, find a customer record.

1. From Enter and edit payments window, click New.
2. Enter an Id and press Tab to populate the Payment Entry window, or click the lookup icon on the Id field to select an Id.
3. Enter a check number in the Check/CC field.
4. Enter the amount of the check in the Pay Amount field.
5. Select the credit line item by clicking the checkbox in the Pay column.
6. Click Auto-apply to apply the credit line item and check payment.

7. Click Save.
8. Close the window.

   Note: If you reopen the Payment Entry window or the Process customer requests window with the same record, the credit does not display in either window.

   To apply a credit balance using *TAB

   The *TAB feature allows you to apply a credit to a customer record. A credit balance is a result of an overpayment that occurs when a customer sends in too much money to pay an Unpaid Balance. You can use *TAB in Service Central for dues/subscriptions (including cash and accrual methods (SUB)), Meeting (ME), Orders (OE), Fundraising (FR) and AR/Cash (INV) transactions.

   There are some differences in how payment information is presented depending on which process you choose to use.

1. From Enter and edit payments window, click Open.
2. Open the customer's transaction record.

   Note: The Pay Amount field is the total of the line items checked for payment in the Pay column. Line items are automatically checked for payment except, Fundraising (FR) and credit balances. If you go directly to the Enter and edit payments window (from Service Central, select Enter and edit payments), checkboxes in the Pay column are not automatically checked for payment.

3. Place your cursor in the Check/CC field and enter an asterisk (*), and press Tab to open the Select Open Payments window.

   The view defaults to an individual view. If you press All, all customer records with an open credit balance displays.

   Note: All credit balances from overpayments to Fundraising or Accrual Dues items are filtered out and will not display on the Select Open Payments window.

4. Make a mental or written note of the available credit balance. Double-click on the line item or, select the line item and click OK. The system returns to the Payment Entry

window.

5. Enter the amount of the available credit balance you wish to apply in the Pay Amount field. Do not enter more than the amount of the available credit balance.
6. Click Save. The system populates the Check/CC field with the invoice reference number of the original transaction that resulted in a credit balance.

To apply a credit balance from Enter and edit payments

1. From Enter and edit payments window, click New.
2. Press Tab and enter an Id, or click the lookup icon to select an Id.
3. Press Tab. The system populates the Enter and edit payments window with the individual's payment information.
4. Place your cursor in the Check/CC field and enter an asterisk (*), and press Tab to open the Select Open Payments window.

   The view defaults to an individual view. If you press All, all customer records with an open credit balance displays. The above view is All.

   Note: All credit balances from overpayments to Fundraising or Accrual Dues items will be filtered out and will not display on the following window.
5. Double-click on the line item or, highlight the line item and click OK. The system populates the Check/CC field with the invoice reference number of the original transaction that resulted in a credit balance. Make a mental or written note of the available credit balance.
6. Enter the amount of the available credit balance you wish to apply in the Pay Amount field. Do not enter more than the amount of available credit balance.
7. Select line item(s) by clicking the checkbox in the Pay column that you wish to pay with the credit balance.
8. Click Save.

Processing List Payments

The list payments feature allows you to apply a payment for dues products (membership dues and subscriptions) to a list of individuals that share a Bill To contact. For example, if a company sends in a dues payment billed for their employees that are members of your organization, you can apply that payment to each individual record from a single page.

Dues products billed to the company will appear in the list based on the following criteria:

- The company record is assigned the company member (CM) Member Type
- The company's ID is either:
- Entered in the Bill To ID field on the individual's Financial tab (from Customers, select Manage customers, find the customer record, and select the Financial tab)
- Entered in the individual's subscription Bill To field (from Customers, select Manage customers, find the customer record, select the Billing tab, and create or open a subscription)

To process list payments

1. From Enter and edit payments window, click New.
2. Accept the default date or enter another value.
3. Enter an Id or click the Find icon to select a company ID.
4. Press Tab to populate the Enter and edit payments window.

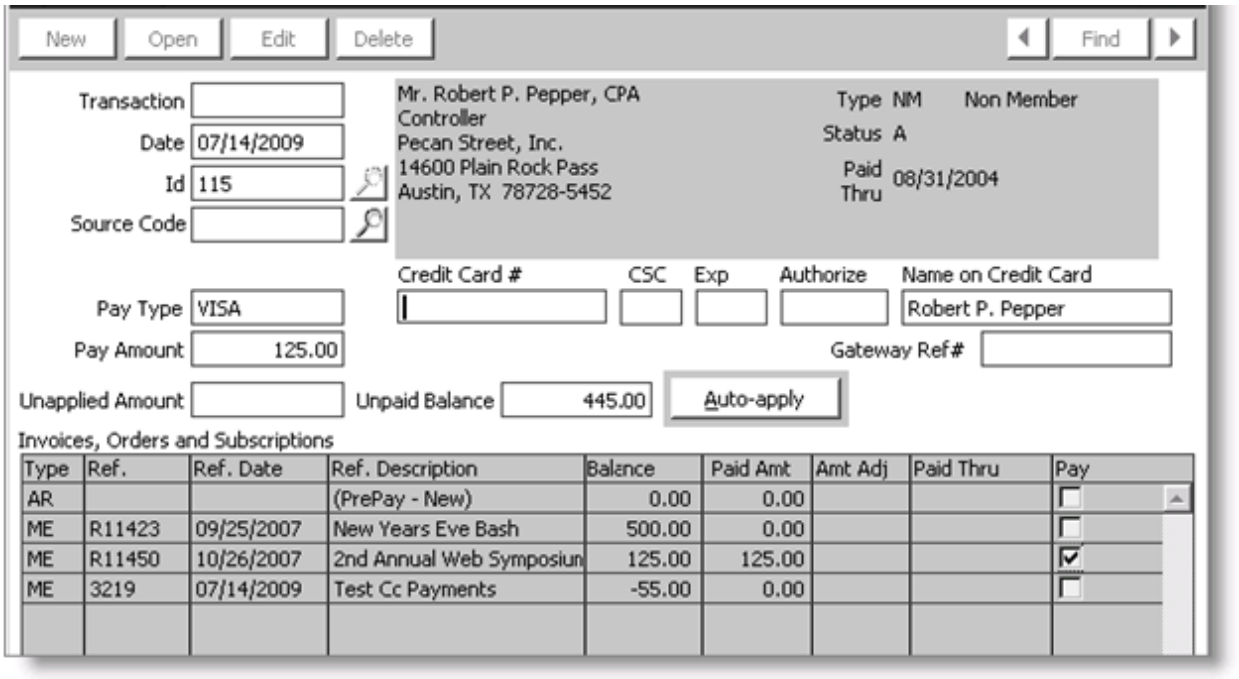
   Note: The items in the list vary depending on whether they are billed as cash dues or accrual dues. A cash dues billing list includes the balances for each individual. An accrual dues billing list only displays a single balance and line per billing type, regardless of how many individual records were billed against the company ID.
5. Enter the Pay Amount.
6. Apply the payment in one of two ways:

- Select Auto-apply to automatically apply the Pay Amount
- Select the Pay checkboxes to choose line items to be paid

7. Click Save.

   The window is updated to only display the paid items.

Enter and edit payments window



Admin Console: Home > Customer Service > Enter and edit payments
Desktop: Service Central > Process customer requests, click Payment

Transaction

Displays the transaction number.

Date

Defaults to the current system date or the batch date if you are using the Batch Control option.

Id

Specifies the customer identification number or if the company is responsible for the payment, this is the company ID. You can click the lookup icon to select a value.

Source Code

(optional) Use to indicate how the payment was made (for example, phone or mail).

Check/CC

Specifies a check number or a credit/debit card code (for example, MC, VISA, AMEX, and DISC). If you enter a valid credit/debit card code, additional payment fields display:

- CC # - Enter the credit/debit card number.
- CSC - (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp - Enter the card's expiration month and year (mm/yy).
- Authorize - Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC - Enter the name as it appears on the payment card.
- Issue # - (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date - (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).
- Gateway Ref # - Read only: Populates when the gateway provider returns the reference number for the transaction.

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Pay Amount

  The system populates this field with the customer's current session balance due (except Fundraising and credit balance line items) when a customer's record is opened in the Pro-

cess customer requests window. This field can be overridden if the customer wants to pay a different amount.

Unapplied Amount

Displays the amount of the current payment that has not yet been applied.

Unpaid Balance

Displays the total of balance due for items not selected (checkbox enabled) for payment.

Auto-apply

Used to enable the system to automatically apply a payment.

Type

Displays the source module or the transaction type.

Ref

Displays a number the system assigns to the transaction.

Ref Date

Displays the invoice reference date.

Ref Description

Displays a description of the referenced transaction. A detailed description displays for Orders (OE) if you enable 1st Line Desc. on Statement on the AR/Cash System Setup window. If you do not enable 1st Line Desc. on Statement, only the transaction name, Order displays in this field.

Balance

Displays the balance for a specific transaction.

Paid Amt

Displays the dollar amount the customer designated to be applied to the specific line item.

Amt Adj

Displays the positive difference between the Balance and Paid Amt used for cash Dues/Subscription billing only.

Paid Thru

Displays the Paid Thru date associated with the specific cash-basis Dues/Subscription line item. This field is populated only if the item has been paid in full.

Pay

Use this checkbox to select or deselect a line item for payment.

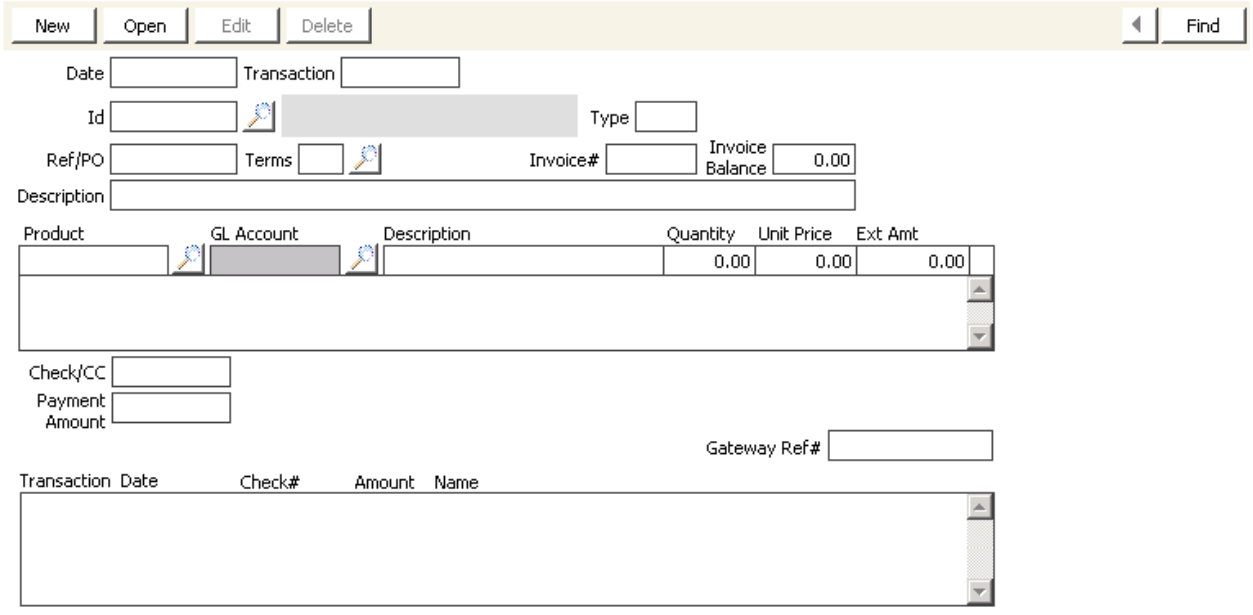
Batch Id

Displays the batch number of the current open batch if you are using Batch Control.

Process sales transactions

You can use the Process sales transactions window to process items that are track through AR/Cash.

Process sales transactions window



Admin Console: Home > Customer Service > Process sales transactions

Desktop: Service Central > Process sales transactions

Commerce

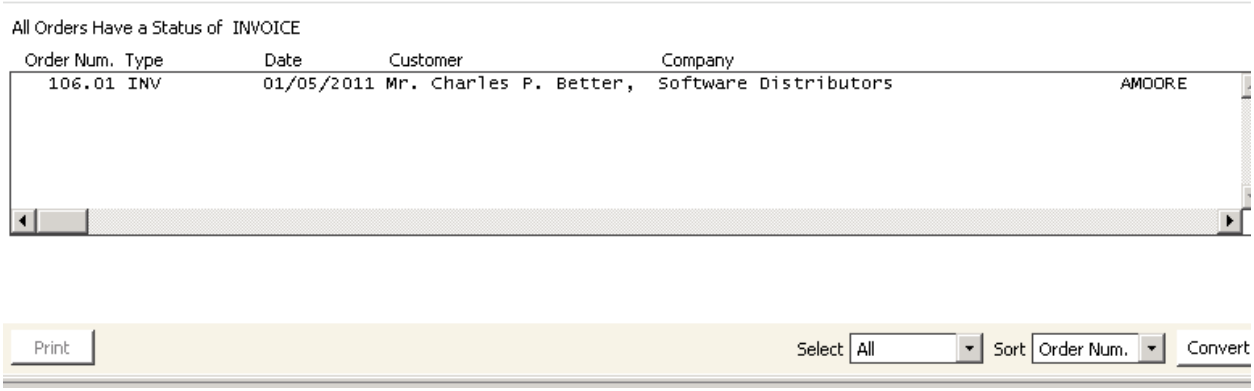
Invoice orders

The Invoice orders option is used for posting selected sales transactions to iMIS AR/Cash. Once you have invoiced an order, the order cannot be edited or deleted.

Generating an order invoice also creates an accounting entry, affects product inventory, and generates an activity record for a customer. If you enable the Create Activity Records for Zero Dollar Orders option on the AR/Cash Set up module window (from AR/Cash, select Set up module), activity records are generated for zero-dollar orders as well.

To invoice orders

1. From Home, select Commerce > Invoice orders.



2. Select the order(s) you want to invoice. To edit an order, double-click it to open the order on the Order Entry window.
3. Click Convert. A message displays asking if you want to invoice the order(s) and mark them as completed.
4. Click Yes to invoice the order(s). The Enter Invoice Date window opens.
5. (optional) Edit the invoice date, if necessary.
6. Click OK to invoice the order(s).

7. (optional) If you are using batch control and have enabled the Create New Batch for Invoicing option on the Order Status Defaults window, a message displays stating that a new batch for order invoicing is going to be created by the system.

- Click Yes to continue.

  The Batch # has been created for invoicing message displays with the specified batch number.

- Click OK.

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Invoice No. 23

Invoice

Sold To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
P.O. Box 8765
Dallas, TX 75206-8765

Ship To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	Shipping Method
110	092502PO	9/25/2002	84	Net 30	9/25/2002	United Parcel Service

Qty Ordered	Qty Shipped	Back-Ordered	Item Code Description	Unit Price	Extended Price
6	6		P42 Sailing, A Sport for Young and Old **Binding** HARDBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** LIMITED	40.25	241.50
5	5		P42 Sailing, A Sport for Young and Old **Binding** SOFTBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** STANDARD	33.25	166.25

Line Item Total	Freight	Handling	Restocking/ Cancellation Fee	Tax	Subtotal	Amount Received	Amount Due
407.75		1.00		25.55	434.30		434.30

Example of an order Invoice; note the user defined fields

Ship orders

The Ship orders option is used for shipping orders and is the only order processing stage that does not generate printed output. At this order processing stage, you can open the Ship Orders window to record an order's actual shipping date and shipping method. The Ship Orders window also allows you to edit freight and handling charges and the quantity of items shipped.

To ship an order

1. From Ship orders window, select the order(s) you want to ship.
2. Click Convert. A message displays prompting you to confirm marking the selected order (s) as shipped.
3. Click Yes. The Shipment Express window opens.
4. If you want to cancel shipping the order, use the following steps:

- Click Cancel. A message displays stating that express shipping was canceled.
- Click OK to cancel shipping the order and return to the Ship orders window.

5. (optional) Edit the Ship Date and/or Ship Method, if necessary.
6. Click OK. A message displays prompting you to remove any previously specified shipping methods.
7. Click No to ship the order, or click Yes to remove any previously specified shipping methods and ship the order.

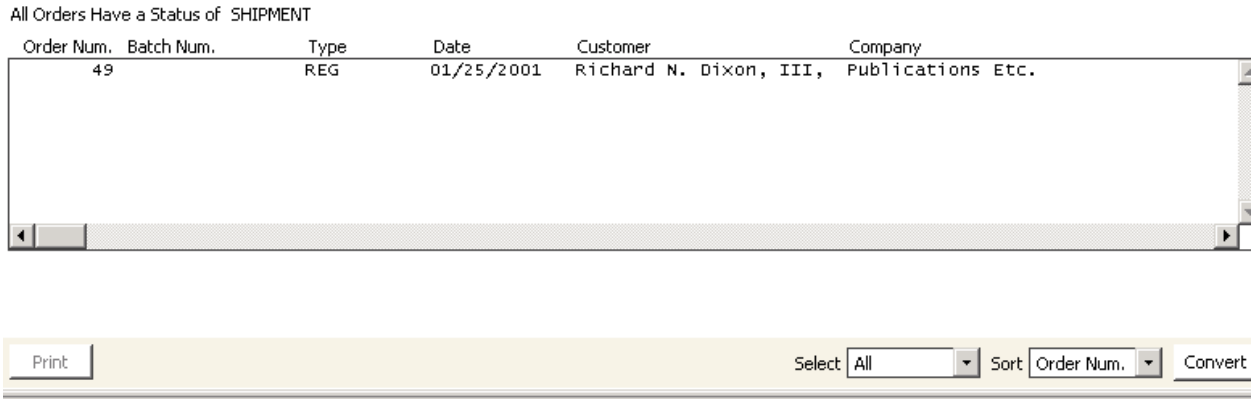
To edit an order's shipping information

You can view and edit an order's shipping information using the Ship Orders window.

1. From Ship orders window, double-click an order to open the Ship Orders window. Detailed information about the selected order displays on the window.
2. Edit the shipping information, if necessary. For example, edit the Ship Date, select a new Ship Method, or override the freight and handling information.

3. Click OK to mark the order as shipped. The order will ship just as if you had selected it and clicked Convert on the Ship orders window.

Ship orders window



Admin Console: Home > Commerce > Ship orders
Desktop: Orders > Process orders > Ship orders

Order Number

(read only) Displays the number assigned to an order.

Order Date

(read only) Displays the date of an order.

PO

(read only) Displays the purchase order number of an order, if any.

Ship To

(read only) Displays the name and address of the customer to whom an order is shipping.

Ship Date

(Defaults to the system date and time) Enter an order's shipping date and time.

Ship Method

Enter an order's shipping method. Select the Find icon to look up a shipping method.

Shipping methods are defined on the SHIP_METHOD lookup/validation tables (from Customers, select Set up tables > lookup/validation).

Freight

Add a freight charge or override the automatic freight charges generated for an order. You can override a Freight amount by entering a value and pressing Tab; the Auto Calc Freight option will disable.

Auto Calc Freight

This option enables automatically if the Automatic Calculation of Freight Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Handling

Add a handling charge or override the automatic handling charges generated for an order. You can override a Handling amount by entering a value and pressing Tab; the Auto Calc Handling option will disable.

Auto Calc Handling

This option enables automatically if the Automatic Calculation of Handling Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Line

(read only) Displays the line number of an order.

Product

(read only) Displays the product codes of the items ordered.

Description

(read only) Displays the product descriptions of the items ordered.

Order

(read only) Displays the quantity of the items ordered.

Ship

Enter the quantity of items shipped.

Back

Enter the quantity of items on back order.

Print pick list

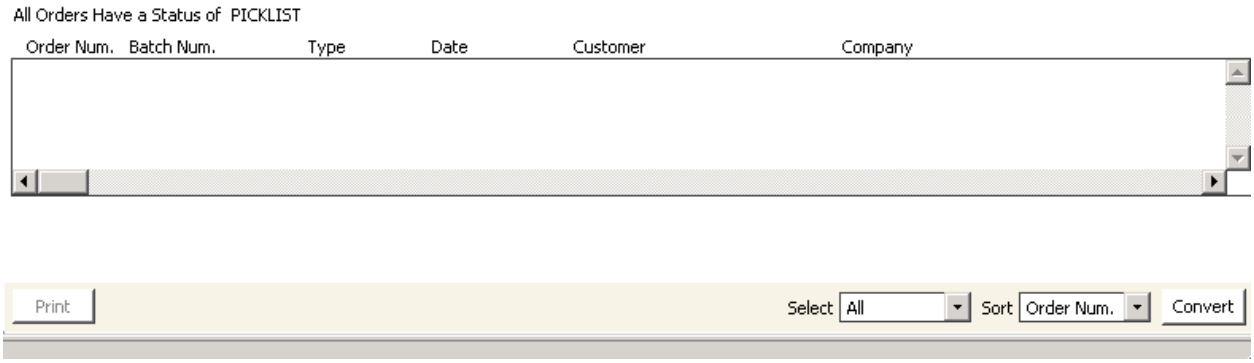
The Print pick list option is used for generating an itemized product list known as a Pick List. Pick lists sort products by product code, order number, and line number, and each product code prints on a separate page. Any user defined fields populated for an order line item on the Product Detail window will print below each line item on a pick list.

If the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory), products also sort by warehouse and bin. Each product code prints on a separate page, and if a product is ordered from multiple warehouses, a pick list then will sort each product code by warehouse; a separate page will print for each warehouse.

A product's warehouse Location Code prints at the top of a pick list. If a bin is defined for a warehouse, the Bin location prints next to a product line-item on a pick list.

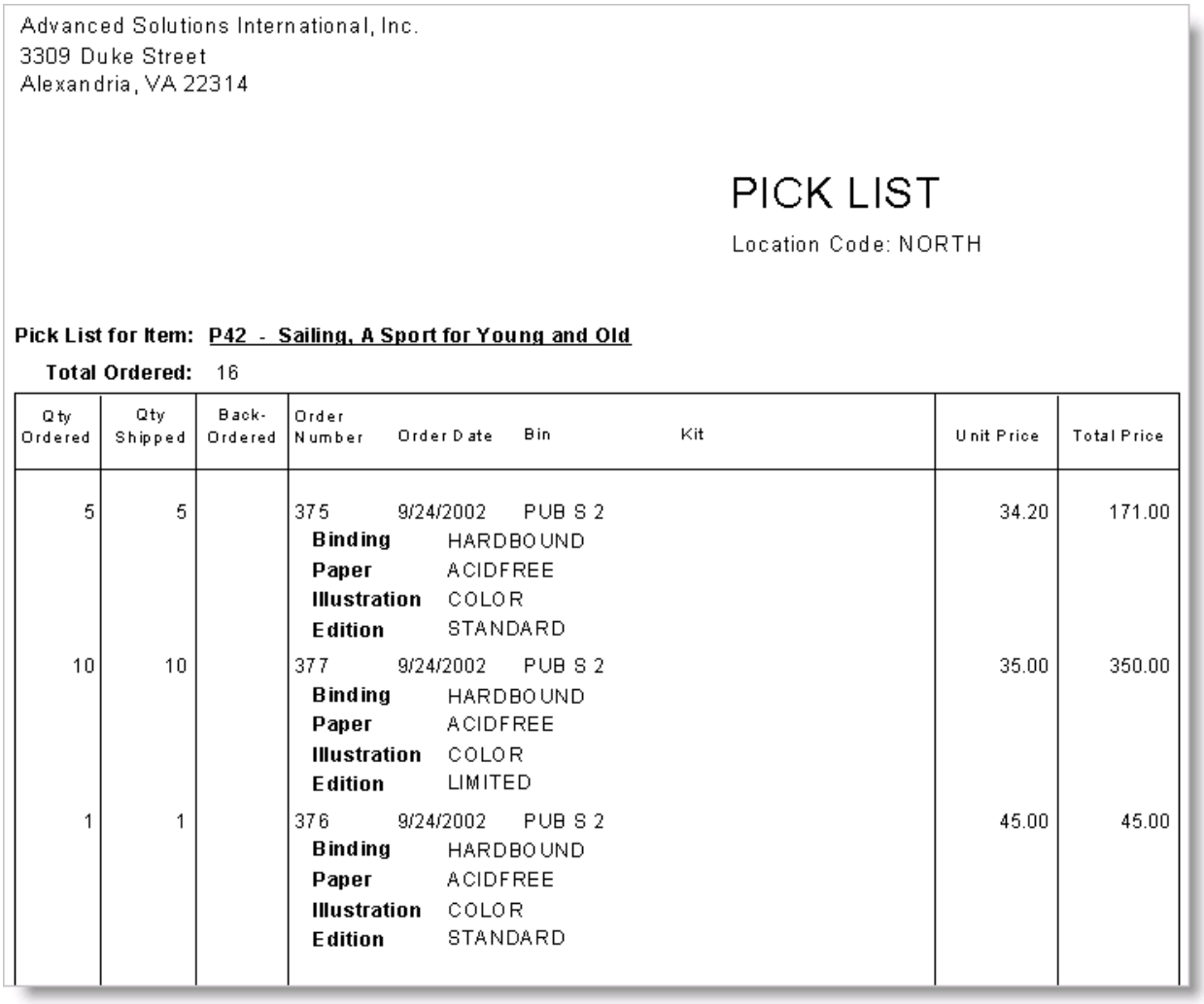
To print a pick list

1. From Home, select Commerce > Print pick list.



2. Select the order(s) for which you want to generate pick lists. To edit an order, double-click it to open the order on the Order Entry window.

3. Click Convert. A message displays prompting you to confirm printing the pick lists.
4. Click Yes to print the pick lists. A pick list will print for each individual item.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

PICK LIST

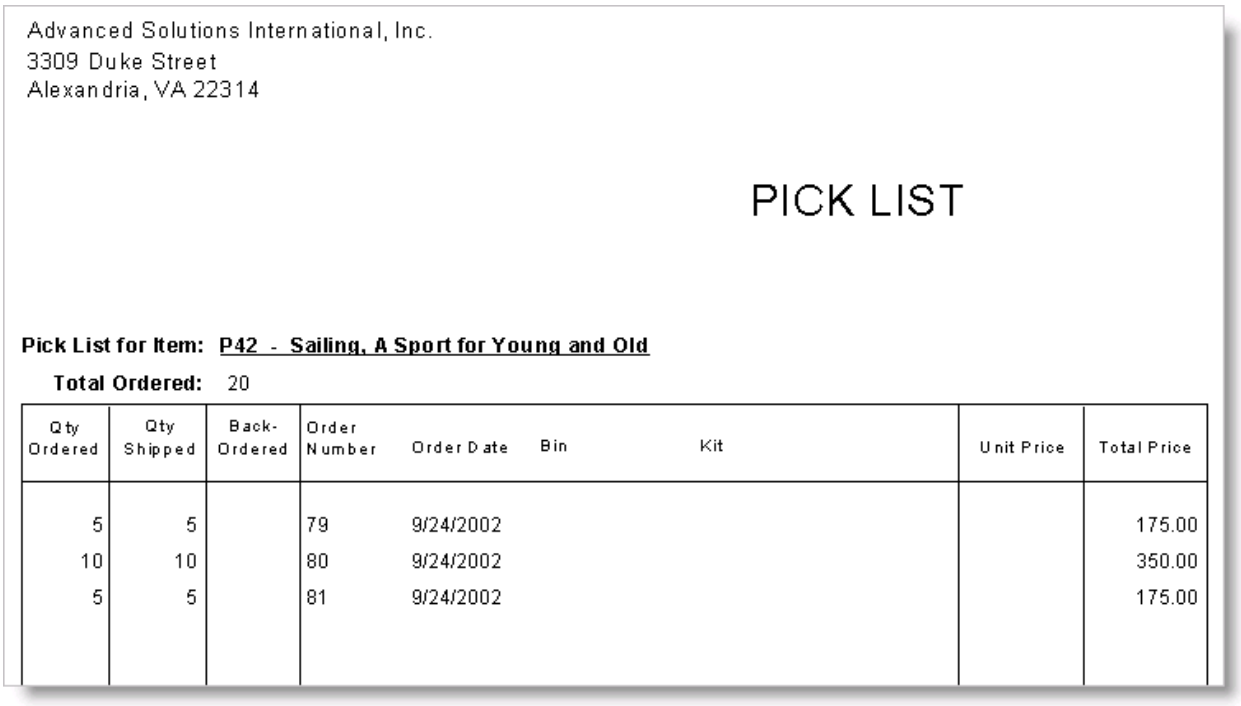
Location Code: NORTH

Pick List for Item: P42 - Sailing, A Sport for Young and Old

Total Ordered: 16

Qty Ordered	Qty Shipped	Back-Ordered	Order Number	Order Date	Bin	Kit	Unit Price	Total Price
5	5		375	9/24/2002	PUB S 2		34.20	171.00
			Binding	HARDBOUND				
			Paper	ACIDFREE				
			Illustration	COLOR				
			Edition	STANDARD				
10	10		377	9/24/2002	PUB S 2		35.00	350.00
			Binding	HARDBOUND				
			Paper	ACIDFREE				
			Illustration	COLOR				
			Edition	LIMITED				
1	1		376	9/24/2002	PUB S 2		45.00	45.00
			Binding	HARDBOUND				
			Paper	ACIDFREE				
			Illustration	COLOR				
			Edition	STANDARD				

Example of a Pick List for item P42 - Multi-Warehouses enabled; note the user-defined fields



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

PICK LIST

Pick List for Item: P42 - Sailing, A Sport for Young and Old

Total Ordered: 20

Qty Ordered	Qty Shipped	Back-Ordered	Order Number	Order Date	Bin	Kit	Unit Price	Total Price
5	5		79	9/24/2002				175.00
10	10		80	9/24/2002				350.00
5	5		81	9/24/2002				175.00

Example of a Pick List for item P42 - Multi-Warehouses disabled

Print shipping papers

The Print shipping papers option is used for generating a shipping paper known as a Packing Slip. Shipping papers generate for individual orders and detail order 'Ship to', Sold To, and content information; each order should ship with shipping papers.

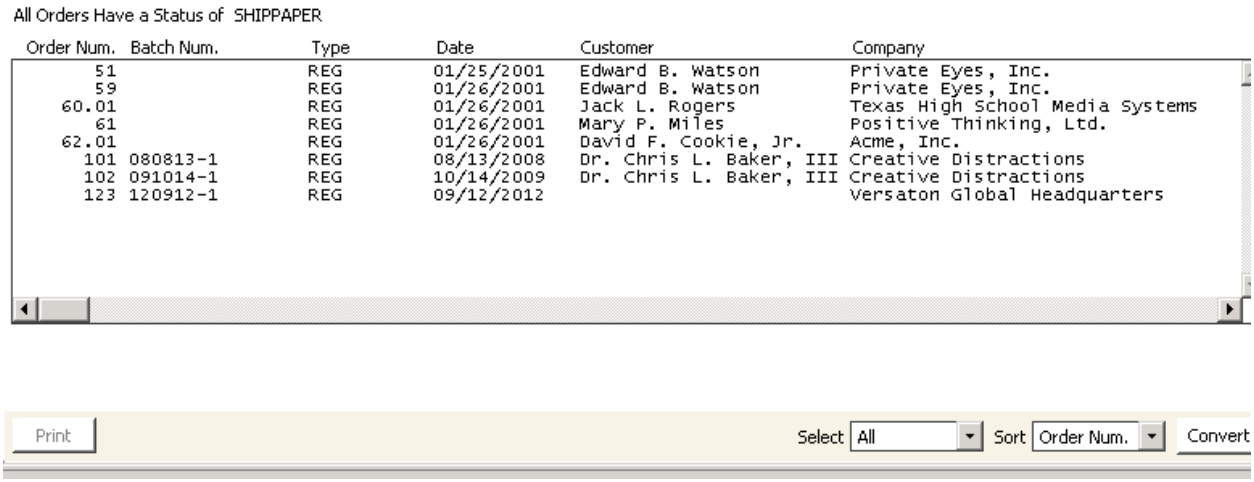
Any user defined fields populated for an order line item on the Product Detail window will print below each line item on a shipping paper. If the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory), shipping papers sort by order number, warehouse, and line number.

If the warehouse location changes for an individual product, that product's order information prints on a separate page. The Warehouse location prints at the top of a shipping paper, and, if a bin is defined for a warehouse, the Bin location prints next to the product line-item. In addition, order quantity totals will not print on shipping papers when the Enable Multi-Warehouses option is enabled.

Shipping papers also sort product kits by warehouse location when the Enable Multi-Warehouses option is enabled. A product kit will print on one page, and the kit's items will sort and print on separate pages depending on warehouse location. For example, a product kit consists of four items. Three items are from the Default warehouse, and the fourth item is from the North warehouse. The three items from the Default warehouse will print on one page, and the fourth item from the North warehouse will print on a separate page.

To print shipping papers

1. From Home, select Commerce > Print shipping papers.



2. Select the order(s) for which you want to print shipping papers. To edit an order, double-click it to open the order on the Order Entry window.
3. Click Convert. A message displays prompting you to confirm printing the shipping papers.
4. Click Yes to print the shipping papers. The following is a sample shipping paper:

   Note: If you are converting multiple shipping papers and screen is the report destination, canceling the job before all shipping papers are processed will cause errors. These errors will occur for every shipping paper that was not processed, and the unprocessed shipping papers will not print. However, each order still will proceed to the Ship orders stage.

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Packing Slip

Warehouse: S

Sold To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
P.O. Box 8765
Dallas, TX 75206-8765

Ship To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Phone Number: (214) 445-6734

Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	Shipping Method
110	092502PO	9/25/2002	84	Net 30		UPS

Qty Ordered	Qty Shipped	Back-Ordered	Item Code Description	Unit Price	Extended Price
6	6		P42 Bin: PUB S 54 Sailing, A Sport for Young and Old **Binding** HARDBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** LIMITED		241.50
5	5		P42 Bin: PUB S 54 Sailing, A Sport for Young and Old **Binding** SOFTBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** STANDARD		166.25

Line Item Total	Freight	Handling	Restocking/ Cancellation Fee	Tax	Subtotal	Amount Received	Amount Due

Example of a Packing Slip - Multi-Warehouses enabled

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

PACKING SLIP

Ship To: Wayne Courtland
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Sold To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
P.O. Box 8765
Dallas, TX 75206-8765

Phone #: (214) 445-6734

Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	Total Weight
110		07/01/2002	196	30 Days		0.50

Qty Ordered	Qty Shipped	Back-Ordered	Item Code Description	Unit Price	Extended Price
1	1		V101 Video - Creating a New Business	39.00	39.00
1	1		V102 Video - Is Fast Food Franchising for YOU!	59.90	59.90

Line Item Total	Freight	Handling	Other	Tax	Subtotal	Amount Received	Amount Due
98.90	5.00	1.00	0.00	6.56	111.46		111.46

Example of a Packing Slip - Multi-Warehouses disabled; pricing information displays only if the Show Prices On Shipping Paper option is enabled on the Order Status Defaults window (from Orders, select Set up module, and click Order Staging)

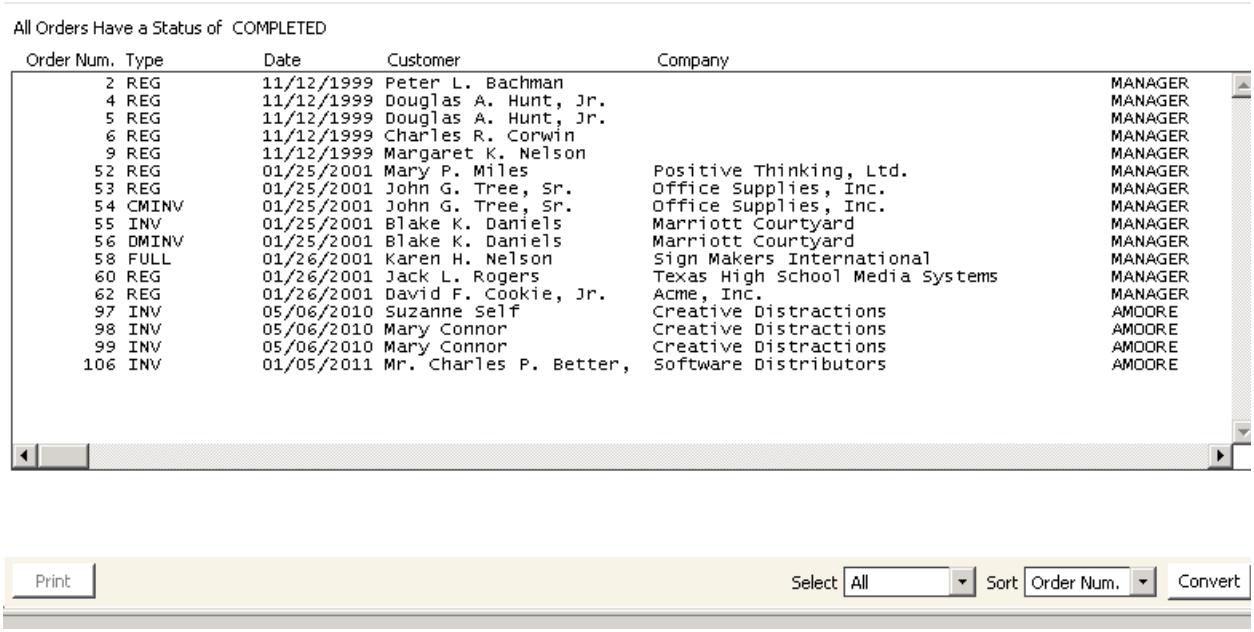
Close orders

The Close orders option is used for closing orders that have a COMPLETED status. Only orders with a COMPLETED status can be closed.

The Close orders option is not a required step, and closing an order changes only the Orders.STAGE field from COMPLETED to CLOSED. It is available as an option for customers who may want to purge or archive order records; you can use the Closed status to indicate which orders are ready for purging or archiving.

To close an order

1. From Home, select Commerce > Close orders.



2. Select the order(s) you want to close.
3. Click Convert. A message displays prompting you to confirm closing the selected order(s).
4. Click Yes to the close the order(s).

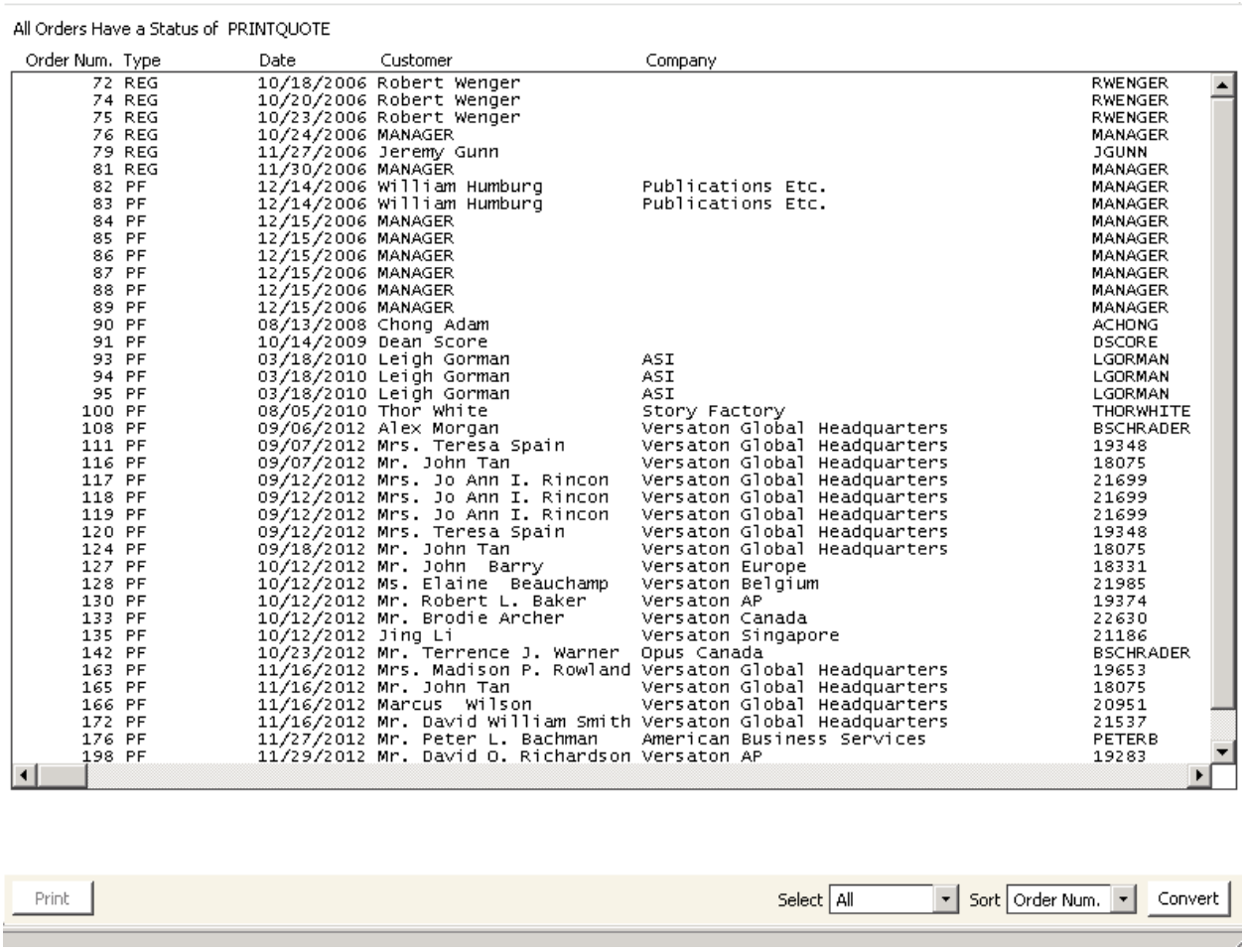
Print quotes

The Print quotes option is used for printing sales quotes. Used only for pro forma orders, the Print quotes option allows you to print sales quotes without affecting product inventory or account status. You can generate sales quotes and then e-mail, fax, or mail the quotes to customers requesting them.

Sales quotes sort by order number and line item number, and any user defined fields populated for an order line item on the Product Detail window will print below each line item on a sales quote.

To print sales quotes

1. Enter a pro forma order (see "Entering orders").
2. From Home, select Commerce > Print quotes.



3. Select the order(s) for which you want to generate sales quotes. To edit an order, double-click it to open it on the Order Entry window.
4. Click Convert. A message displays prompting you to confirm moving the pro forma order (s) to the next stage.
5. Click Yes to convert the order(s) and print the sales quote(s).

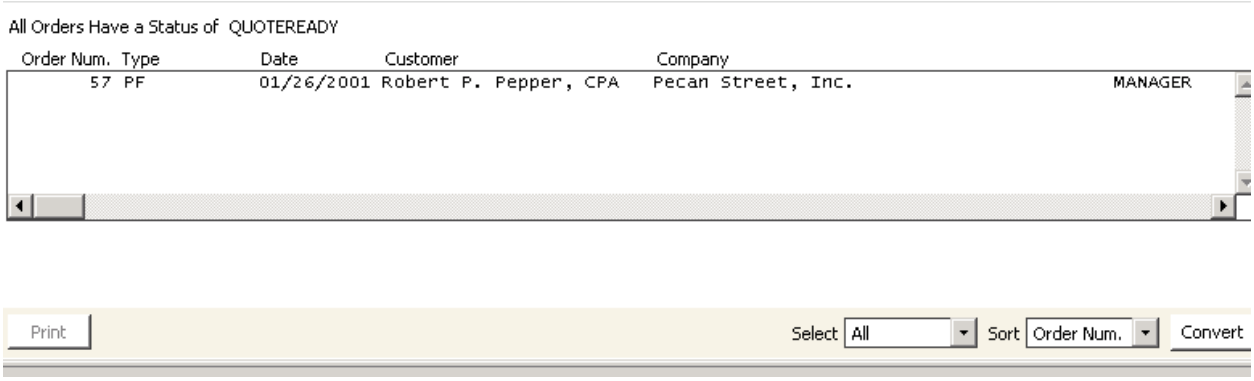
Convert quotes

The Convert quotes option is used only with pro forma orders. It is the second order processing stage for pro forma orders following the Print quotes stage and automatically converts pro forma orders to actual orders.

You determine which order type pro forma orders convert to in the Convert to Order Type field on the Order Status Defaults window (from Orders, select Set up module, and click Order Staging). A converted order then enters the staging process at the correct order processing stage defined for that order type. The Convert quotes option does not generate printed data.

To convert quotes

1. Complete the Print quotes order processing stage for the pro forma order you want to convert. See Printing Sales Quotes.
2. From Home, select Commerce > Convert quotes .



3. Select the order(s) you want to convert. To edit an order before converting it, double-click the order to open it on the Order Entry window.

4. Click Convert. A message displays prompting you to confirm converting to the appropriate order type.
5. Click Yes to convert the quote(s) to the appropriate order type. The Convert quotes option does not generate printed data.

Release backorders

The Manually release backorders option is used to reverse an order's BACKORDER status. A released backorder is removed from the holding stage for orders awaiting inventory and is returned to its appropriate order processing stage.

The Manually release backorders option is available even if the Automatic Backorder Processing option is enabled on the Backorder Processing window (from Orders, select Set up module, and click Backorders).

To release backorders manually

1. From Home, select Commerce > Release backorders.

   All of the orders with a BACKORDER status display on the window.
2. Select the order(s) you want to release from BACKORDER status.
3. Click Convert.

   A message displays prompting you to confirm returning the selected order(s) to the appropriate order processing stage.
4. Click Yes to release the backorder(s).

Posting receipts

Upon entering a product inventory transaction and verifying that the transaction information is correct, a transaction can be posted. When an inventory transaction is posted, a product's inventory records are updated with the transaction information.

If you elect to post inventory transactions automatically (not recommended), all transactions are posted when they are entered and saved on the Enter and edit receipts and adjustments window. Automatically posting inventory transactions is not recommended

because it does not allow you to review your transactions and make any necessary corrections before posting the transactions.

By posting transactions manually, you can verify and correct any errors before posting a transaction. This helps protect product inventory, backorder, and cost of goods sold information from inadvertent updates or changes. Inventory transactions are posted manually as long as the Automatically Post Inventory Receipts/Adjustments option is disabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

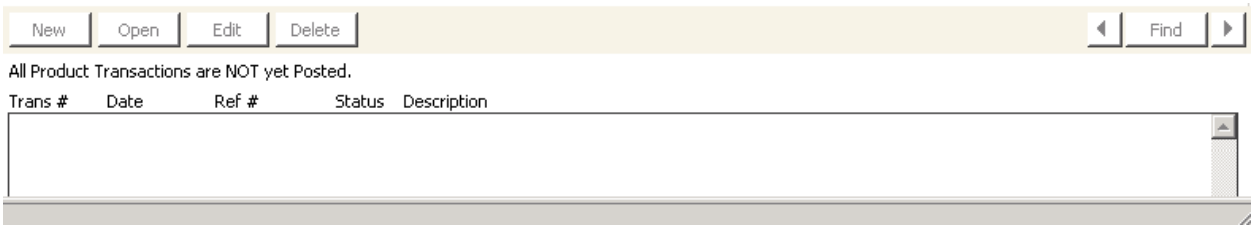
After verifying that your transaction information is correct, you can post your inventory transactions individually, in groups, or all at once using the Post receipts window (from Orders, select Manage inventory> Post receipts).

Caution! Product inventory receipts, adjustments, and transfers can be posted only for products that have an Active, Inactive, or Out of Production status. If a product's status is changed to a status other than Active, Inactive, or Out of Production after a transaction has been entered for the product, the transaction will not display on the Post receipts window and cannot be posted.

To post inventory receipts

1. From Home, select Commerce > Post receipts.
2. (optional) Sort the inventory transactions using the drop-down list.
3. Select the transaction(s) you want to post.
4. Click Post. A message displays prompting you to verify posting the selected transaction (s).
5. Click Yes to post the transaction(s). A Product Posting report generates automatically.

Post receipts window



Admin Console: Home > Commerce > Post receipts
Desktop: Orders > Manage inventory > Post Receipts

Trans #

This column displays the transaction number for the product inventory transaction. iMIS generates the transaction number after the inventory transaction is entered.

Date

This column displays the date of the product inventory transaction.

Ref #

This column displays the number entered in the Invoice # field on the Enter and edit receipts and adjustments window.

Status

(read only) Displays the product's status. Inventory transactions can be posted only for products that have an Active, Inactive, or Out of Production status.

Description

This column displays the description entered in the Description field on the Enter and edit receipts and adjustments window.

Sort

(Not shown in example) Use this drop-down list to sort the product inventory transactions on the Post receipts window. The following sorting options are available:

- Trans # – Sorts by transaction number.
- Trans Date – Sorts by transaction date.
- Ref # – Sorts by invoice number.
- Description – Sorts by description.
- Entered By – Sorts according to transaction entry.

Post button

(Not shown in example) Click to post the selected product inventory transaction(s).

Posting transactions for multiple warehouses

While the process of posting inventory transactions for multiple warehouses and standard inventory is the same, you need to be aware of the following when posting transactions for multiple warehouses:

Removing warehouses

Once you remove a product's warehouse, you cannot post any outstanding, non-posted inventory transactions for that warehouse. If you post inventory transactions manually and remove a product's warehouse, all non-posted inventory transactions will be removed from the Post receipts window. However, non-posted inventory transactions will still display on the Enter and edit receipts and adjustments window (from Orders, select Enter and edit receipts and adjustments).

Inventory transfers

Transferring inventory from one warehouse to another affects both product cost and inventory field values when a transfer is posted.

Cost of Goods Sold – Regardless of whether the Average or Standard Cost valuation method is selected when the Cost of Goods Sold option is enabled on the Inventory System Setup window, the following rule applies when posting inventory transfers:

Caution! The extended amount of the transferred product cannot exceed the current total cost of the From Warehouse.

If the extended amount of the transferred product exceeds the current total cost of the From Warehouse, then iMIS will perform the following calculations:

1. The average cost of the From Warehouse will be multiplied by the quantity transferred in determining that the average cost does not exceed the total cost:
2. If the average cost does not exceed the total cost, then the extended amount will be recalculated by multiplying the average cost by the quantity transferred. The unit cost of the transferred product then will be updated by dividing the extended amount by the quantity transferred.
3. If the average cost does exceed the total cost, then the extended amount will equal the total cost of the product inventory. The unit cost of the transferred product then will be updated by dividing the extended amount by the quantity transferred.

   Field recalculation

   The following fields will be recalculated when transferring inventory from one warehouse to another:

- From Warehouse

  Qty on Hand (Manage products window) will be reduced by the Quantity (Enter and edit receipts and adjustments window) transferred.

  Total cost (Warehouses window) will be reduced by the Ext Amt (Enter and edit receipts and adjustments window) of the product transferred.

  Avg/Std cost (Warehouses window) will be updated by dividing the Total cost (Warehouses window) by the Qty on Hand (Manage products window).

- To Warehouse

  Qty on Hand (Manage products window) will be increased by the Quantity (Enter and edit receipts and adjustments window) transferred.

  Total cost (Warehouses window) will be increased by the Ext Amt (Enter and edit receipts and adjustments window) of the product transferred.

Avg/Std cost (Warehouses window) will be updated by dividing the Total cost (Warehouses window) by the Qty on Hand (Manage products window).

Enter and edit products

Before defining your individual products, you first must define your product categories. Product categories are defined on the Set up product categories window.

After defining your product categories, you can define your individual products. Products are defined and managed on the Manage products window, which allows you to enter and access product codes, titles, descriptions, prices, accounting information, and other specific product options. The Manage products window also is used for accessing and displaying product inventory information and for designating a product's Process Manager items.

To define a product

1. From Enter and edit products window, click New.
2. Define the product:

- Enter a Code for the product. The product code should not contain any spaces or special characters other than an underscore.
- Select a product Category from the drop-down list of available categories.
- Enter a Title for the product.

3. Enter any applicable product descriptions:

- Enter a general product description in the Desc field.
- Enter a product description for a product catalog in the Catalog Desc field.
- Enter any other product description in the Other Desc field.

4. Enter the product's Pricing information:

- Enter a default price for the product in the Regular field.
- (optional) Enter a Non-Member price for the product if applicable.

Note: If products are used only as kit components, you do not need to enter prices for the individual products that make up the kit. Only the kit itself requires product pricing information.

5. Enter the product's Options:

- Enter the product's Unit of Measure, such as each or sheet.
- (optional) Enable the Commissionable option if a product's sale generates a commission (enter a commission percentage in the Comm % field if you enable the Commissionable option).
- Enter the product's Weight.
- Enable the Stock Item option.
- (optional) Enable the Taxable option if the product is taxable.
- (Optional/For use with Fundraising) Enable the Premium option to use the product as a premium for gifts and pledges, and enter a Fair Market Value.
- (Multi-Warehouses only) Enter the product's Default Warehouse location if you are using Multi-Warehouses. Select the Find icon to look up a warehouse.
- (Multi-Entities only) Enter an Entity for the product.

6. Click Save.

To edit a product

When editing a product that is a stock item, you cannot disable the Stock Item option if the product has inventory in stock. A product's inventory must be reduced to zero if you want to indicate the product is no longer a Stock Item. For additional information, see To enter inventory adjustments.

1. From Enter and edit products window, select the product you want to edit from the list of Current Products.
2. Click Edit.
3. Make any necessary changes.

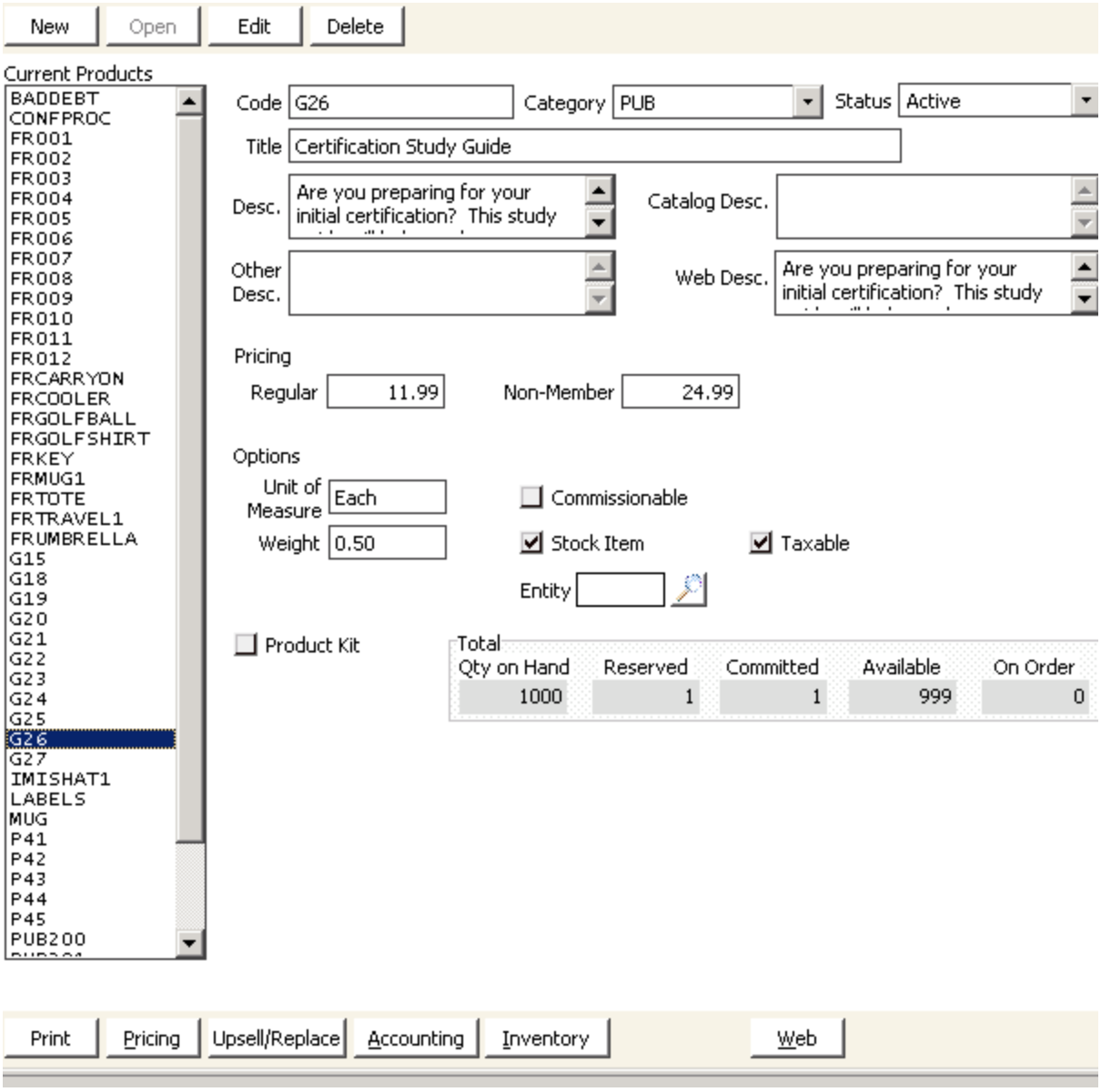
4. Click Save.

To delete a product

You can delete a stock item only if all inventory quantities are zero. When you delete a product, all of the product's Upsell/Cross-sell/Replacement records also are deleted.

1. From Enter and edit products window, select the product you want to delete from the list of Current Products.
2. Click Delete. You are prompted to verify deleting the product.
3. Click Yes to delete the product.

Enter and edit products window



Admin Console: Home > Commerce > Enter and edit products

Desktop: Orders > Manage inventory > Manage products

Current Products

Lists all of the defined product codes. Select a product code from the drop-down list to view the product's details on the Manage products window.

Code

(required) Enter a specific code for an individual product.

Category

(required) Select a product's category from the drop-down list. Product categories are defined on the Set up product categories window (from Orders, select Set up tables > Product categories).

Status

Select a product's status from the drop-down list. The default status for all new products is Active, and you can assign the following status codes to your products at any time during a product's life cycle:

- Active (A)
- Inactive (I)
- Mark for Deletion (D)
- Not Available (N)
- Out of Production (O)

See Product Status Codes for more on product status code functionality.

Title

Enter a brief, descriptive product title. A product's title displays next to the product's code on windows and reports; product titles can be edited when entering orders.

If the Print 1st Line Desc on Statement option is enabled on the AR/Cash Set up module window (from AR/Cash, select Set up module), the product title entered in the Description field on the Overview tab of the Enter and edit orders window prints on invoices and statements. The product title entered in the Description field also displays on the AR/Cash tab on the Manage customers window and on the AR/Cash Enter and edit cash receipts window. If the Print 1st Line Desc on Statement option is disabled on the AR/Cash Set up module window, only the order number prints on statements and displays on windows.

Description Fields

All description fields hold product descriptions, to a maximum of 5000 characters:

- Desc

  Enter the product description to be seen by staff. The text entered in the Desc field does not appear on printouts, but it will appear on the product's web description if none exists in Web Desc.

- Catalog Desc

  Unused.

- Other Desc

  Unused.

- Web Desc

  Enter the description to display on the Product Detail page; otherwise, the web page uses the Desc text, if any.

  Note: Place key search terms within the first 300 characters of the description. In the Public view, search truncates the description to 300 characters, so only text within that range yields search results for users.

  Pricing

- Regular – Enter a product's default unit price. The price entered in the Regular field will apply for all customers unless you enter a different price in the Non-Member field. You can override a product's default price at order entry.

  The Use Member Pricing option on the Overview tab of the Enter and edit orders window allows you to apply Regular product pricing for non-member customers.

- Non-Member (optional) – Enter a product price for non-member customers. This price applies automatically when you sell a product to any customer with Non-Member status, allowing you to avoid most manual price overrides.

  If the Non-Member field is blank, a product's price defaults to the value entered in the Regular field for non-member customers. You can override a product's default price at

order entry, and the Use Member Pricing option on the Overview tab of the Enter and edit orders window allows you to apply Regular product pricing for non-member customers.

- Fair Market Value (Displays only when the Premium option is enabled) – Enter a fair market value for a product used as a premium. You must enter a value in this field, which can be 0.00. The default value is 0.00.

Options

- Unit of Measure – Enter a product's unit of measure, such as individually, each, foot, yard, sheet, book, or pack.
- Commissionable – Enable if a product's sale generates a commission.
- Comm % – (Displays only when the Commissionable option is enabled) Enter the commission percentage a product's sale will generate.
- Weight – Enter a product's weight. When defining product kits, be sure to enter a Weight. Freight by weight charges will not calculate for a product kit unless a weight has been defined, regardless of whether weight has been defined for the individual kit components.
- Stock Item – Enable to indicate that a product is stored in inventory. When the Stock Item option is enabled, both products in inventory and backorders are tracked in the Qty on Hand, Reserved, Committed, Available, and On Order fields on the Manage products window.
- Taxable – Enable if a product is taxable. When the Taxable option is enabled, iMIS automatically calculates any applicable taxes for a product according to the tax code entered for an order. When defining a new product, the Taxable option on the Manage products window enables by default if the Taxable option on the Set up product categories window is enabled for the new product's category.
- Premium – Enable this option to use a product as a premium for gifts and pledges. This option only displays only if Allow Premiums as Products is enabled on the Fundraising Set up module page.

When an order is generated for a product used as a Fundraising premium, the Notes field on the Order Details tab of the Enter and edit orders window displays the text “Premium order for Transaction TransNum, Batch BatchNum” (for example, Premium order for Transaction 1438, Batch 08062004). See Fundraising Management (see "Fundraising") for details about using premium products.

- Default Warehouse – (Required/Displays only if using Multi-Warehouses) Enter a stock item's default warehouse location. Select the Find icon to look up a warehouse; warehouse locations are defined in the Set up warehouses window (from Orders, select Set up warehouses).

  The Default Warehouse field displays only if a product is a stock item and the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory). If a default warehouse is defined on the Inventory System Setup window, the Default Warehouse field defaults to the warehouse defined on the Inventory System Setup window. A product's default warehouse can be overridden at order entry on the Product Detail window with a warehouse that is pre-defined for the product.

  Individual warehouses are set up for products on the Warehouses window (from Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Warehouses).

- Entity – (Optional/displays only if Multiple Entities is enabled on the AR/Cash Set up module window) Enter an owner entity for an individual product. Select the Find icon to look up an entity; entities are defined in the Org Codes field on the Organization Names window (select File > System Setup, and click Organization Names).

  An Entity value can be left blank if the entity owner is the same as the default Orders entity assigned on the AR/Cash Set up module window.

  Product Kit

  Enable if a product is a kit. A kit is a group of individual products sold as a single unit. The Product Kit option displays only if your system is licensed for product kitting.

  Kit button

(displays only when the Product Kit option is enabled) Opens the Kitting window used for defining product kits.

Total

The totals are display only:

- Qty on Hand – the total number of products in inventory. If using Multi-Warehouses, Qty on Hand includes the total number of products in inventory across all warehouses.
- Reserved – the number of products that are in “open order” status, including backorders. If using Multi-Warehouses, Reserved includes the total number of products reserved across all warehouses.
- Committed – the number of shippable products in inventory excluding backorders. If using Multi-Warehouses, Committed includes the total number of products committed across all warehouses.
- Available – the number of products on hand excluding reserved products. If using Multi-Warehouses, Available includes the total number of products available across all warehouses.
- On Order – the number of products on order from suppliers. If using Multi-Warehouses, On Order includes the total number of products on order across all warehouses.

  The number of products displayed depends on the number of products entered in the On Order field on the Inventory / Warehouses window (click Inventory / Warehouses on the Manage products window).

  Pricing button

  Opens the Special Pricing window used for setting up specific product price calculations.

  Upsell/Replace button

  Opens the Upsell/Replace window used for designating Upsell, Cross-sell, and Replacement items for products.

  Accounting button

Opens the Accounting window used for entering product account information.

Inventory / Warehouses button

- Inventory button – (Disabled for non-stock items) Opens the Inventory window used for entering product inventory information. The Inventory button displays and replaces the Warehouses button when Multi-Warehouses is disabled.
- Warehouses button – (Disabled for non-stock items) Opens the Warehouses window used for entering inventory information for a product's individual warehouses. The Warehouses button displays and replaces the Inventory button when Multi-Warehouses is enabled.

Publication button

Opens the Publication Demographics window used for defining additional information for publications. The Publication button displays only if the Use Publication Demographics option is enabled for a product's category on the Set up product categories window (from Orders, select Set up tables > Product categories).

Web button

Opens the Web Options window to display a product on the Web.

Enter and edit receipts and adjustments

The flexibility of Orders simplifies managing product inventory and ensures inventory transactions are recorded efficiently and accurately. How you manage product inventory and process inventory transactions depends on whether your inventory is stored in a single location or in multiple warehouses.

After entering a product inventory transaction, the transaction must be posted. Inventory transactions can be posted either automatically or manually. Manually posting inventory transactions is recommended because it provides an opportunity to review a transaction for errors. Automatic transaction posting does not offer this opportunity.

Entering and posting inventory transactions

Product inventory transactions include inventory receipts, adjustments, and transfers. Automatically posting inventory transactions is not recommended because it does not allow you to review your transactions or make any necessary corrections before the transactions are posted.

By posting transactions manually, you can verify and correct any errors before a transaction is posted. This helps protect product inventory, backorder, and cost of goods sold information from inadvertent updates and changes.

To post inventory receipts and adjustments manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (Configure > Commerce, click Inventory).

All inventory transactions are entered using the Enter and edit receipts and adjustments window (Home > Commerce > Enter and edit receipts and adjustments).

Entering inventory receipts

Product inventory receipts allow iMIS Orders to record and track your physical product inventory accurately and efficiently. Inventory receipts are recorded when a product is received in inventory, and receipts can be entered only for stock items that have an Active, Inactive, or Out of Production status.

When entering product inventory receipts, enter the transaction date, invoice number, description, and quantity received in inventory for a specific product. When an inventory receipt is entered, a transaction number is generated automatically as a reference for the receipt. When inventory receipts are posted, iMIS automatically updates and adjusts your product inventory records.

To ensure accurate inventory records, manually posting inventory receipts is recommended because it provides an opportunity to review the receipts before they are posted. This helps prevent entering any inadvertent updates or changes. To post inventory receipts manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (Configure > Commerce, click Inventory).

Your method of storage determines how inventory receipts are entered. If an individual product is stored in a single storage facility, you only need to enter a single inventory receipt for a product. If an individual product is stored in multiple warehouses, you have the ability to enter inventory receipts for each warehouse in which a product is stored. In order to record inventory receipts for products stored in multiple warehouses, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window (Configure > Commerce, click Inventory).

To enter inventory receipts

Follow this procedure if the Enable Multi-Warehouses option on the Inventory System Setup window (Configure > Commerce, click Inventory) is disabled.

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory receipt, or accept the default system date.
3. Enter an Invoice #, such as the invoice number of the vendor's invoice.
4. Enter a brief Description of the product inventory receipt.
5. Enter the code of the Product received in inventory (select the Find icon to look up a product code). Receipts can be entered only for products that have an Active, Inactive, or Out of Production status.
6. Press Tab. The product's Description and Unit Cost display by default. The Description can be overridden if necessary.
7. Enter the Quantity of the product received in inventory.
8. (optional) Enter the Unit Cost of the product, or accept the default unit cost.
9. Press Tab, and repeat this process for each additional product inventory receipt you want to enter.
10. Click Save.

To enter inventory receipts for multiple warehouses

Follow this procedure if the Enable Multi-Warehouses option on the Inventory System Setup window is enabled.

1. From Enter and edit receipts and adjustments window, click New. The Receipt option is enabled by default.
2. (optional) Enter the Date of the product inventory receipt, or accept the default system date.
3. Enter an Invoice #, such as the invoice number of the vendor's invoice.
4. Enter a brief Description of the product inventory receipt.
5. Enter the Product code of the product received in inventory (select the Find icon to look up a product code). Receipts can be entered only for products that have an Active, Inactive, or Out of Production status.
6. Press Tab. The product's default Warehouse, Bin (if applicable), Description, and Unit Cost display by default.
7. Enter the Warehouse for which you are entering the inventory receipt (select the Find icon to look up a warehouse), or accept the product's default warehouse. You also can enter a warehouse that has not been pre-defined for the product:

   Entering a warehouse that has not been pre-defined creates a new warehouse record for that product.
8. Enter the warehouse Bin in which the product is stored, or accept the default bin.
9. (optional) Enter the product's Description, or accept the default product description.
10. Enter the Quantity of the product received in inventory at the warehouse.
11. Enter the Unit Cost of the product, or accept the default unit cost.
12. Press Tab, and repeat this process for each additional product inventory receipt you want to enter.
13. Click Save.

Entering inventory adjustments

Product inventory adjustments allow you to adjust your inventory records for stock items when you need to make corrections. For example, you may need to enter a product inventory adjustment after taking inventory of all products and discovering loss or damage that has decreased a product's physical inventory.

Inventory adjustments are entered just as inventory receipts are entered, and the only difference between the two is that negative quantities can be entered for inventory adjustments. Adjustments can be entered only for products with an Active, Inactive, or Out of Producton status, and iMIS automatically updates and adjusts your product inventory records when adjustments are posted.

As with all inventory transactions, manually posting inventory adjustments is recommended. To post inventory adjustments manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

As with inventory receipts, your method of storage determines how inventory adjustments are entered. In order to record inventory adjustments for a product stored in multiple warehouses, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window.

To enter inventory adjustments

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory adjustment, or accept the default system date.
3. Enter an Invoice # for the inventory adjustment.
4. Enter a brief Description of the product inventory adjustment.
5. Enable the Inventory Adjustment option.
6. Enter the code of the Product for which you are entering an inventory adjustment (select the Find icon to look up a product code). Adjustments can be entered only for products that have an Active, Inactive, or Out of Production status.

7. Press Tab. The product's Description and Unit Cost display by default. The Description can be overridden if necessary.
8. Enter the quantity of the inventory adjustment:

- Enter a positive amount in the Quantity field to increase a product's inventory.
- Enter a negative amount in the Quantity field to decrease a product's inventory.

9. Enter the Unit Cost of the product, or accept the default unit cost.
10. Press Tab, and repeat this process for each additional product adjustment.
11. Click Save to enter the inventory adjustment.

To enter inventory adjustments for multiple warehouses

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory adjustment, or accept the default system date.
3. Enter an Invoice # for the inventory adjustment.
4. Enter a brief Description of the product inventory adjustment.
5. Enable the Inventory Adjustment option.
6. Enter the code of the Product for which you are entering an inventory adjustment (select the Find icon to look up a product code). Adjustments can be entered only for products that have an Active, Inactive, or Out of Production status.
7. Press Tab. The product's Warehouse, Bin (if applicable), Description, and Unit Cost display by default.
8. Enter the Warehouse for which you are entering the inventory adjustment (select the Find icon to look up a warehouse), or accept the product's default warehouse.
9. Enter the warehouse Bin in which the product is stored, or accept the default bin.
10. (optional) Enter the product's Description, or accept the default product description.
11. Enter the quantity of the inventory adjustment:

- Enter a positive amount in the Quantity field to increase a product's inventory.
- Enter a negative amount in the Quantity field to decrease a product's inventory.

12. Enter the Unit Cost of the product, or accept the default unit cost.
13. Press Tab, and this process for each additional product adjustment.
14. Click Save to enter the inventory adjustment.

Entering inventory transfers

If you store individual products in multiple warehouses, iMIS Orders gives you the ability to record product inventory transfers from warehouse to warehouse.

Product inventory transfers may be necessary under a variety of circumstances. For example, a product's inventory at one warehouse may be insufficient to meet immediate customer demand. If another warehouse has excess inventory in stock, you may decide to transfer the excess inventory to the warehouse with insufficient inventory.

When product inventory transfers are posted, iMIS automatically updates and adjusts a product's inventory record for each warehouse involved in the transfer. As with all inventory transactions, manually posting inventory transfers is recommended. To post inventory transfers manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

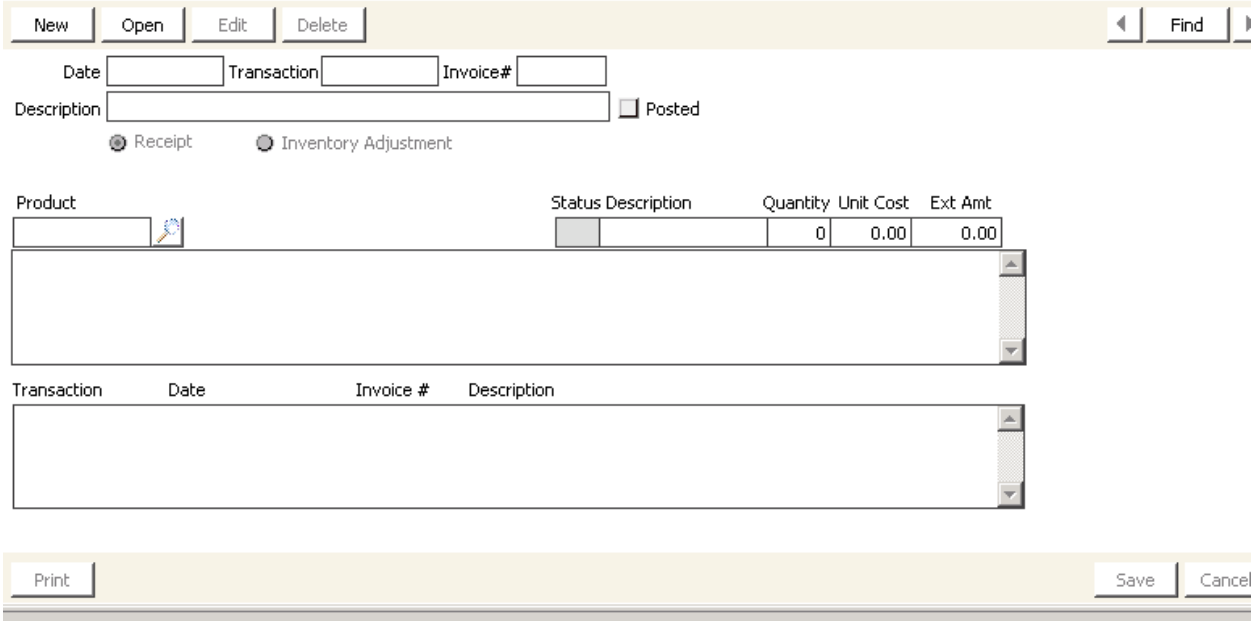
To record inventory transfers for a product stored in multiple warehouses, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window.

To enter inventory transfers

Transfers can be entered only for products that have an Active, Inactive, or Out of Production status. If you select a To Warehouse that is not already assigned to the product, iMIS automatically assigns the warehouse once you save the inventory transfer and adds it to the product's Warehouses window. Entering or editing a Bin value on the Enter and edit receipts and adjustments window updates a product's Warehouses window for that To Warehouse.

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory transfer, or accept the default system date.
3. Enter an Invoice # for the inventory transfer.
4. Enter a brief Description of the product inventory transfer.
5. Enable the Transfer option. The From Warehouse, To Warehouse, and Bin (To Warehouse) fields display.
6. Enter the code of the Product that you are transferring (select the Find icon to look up a product code). Transfers can be entered only for products that have an Active, Inactive, or Out of Production status.
7. Press Tab. The product's From Warehouse, Bin ('From Warehouse'), Description, and Unit Cost display by default.
8. Enter the product's From Warehouse. This is the warehouse from which inventory is transferred. Select the Find icon to look up a warehouse, or accept the product's default warehouse.
9. Enter the 'From Warehouse' Bin, or accept the default bin.
10. Enter the product's To Warehouse. This is the warehouse to which inventory is transferred. Select the Find icon to look up a warehouse.
11. Enter the product's To Warehouse Bin if applicable.
12. (optional) Enter the product's Description, or accept the default product description.
13. Enter the Quantity of the inventory transfer. The quantity entered cannot be a negative value or exceed the From Warehouse's total available inventory.
14. Click Save.

Enter and edit receipts and adjustments window



Admin Console: Home > Commerce > Enter and edit receipts and adjustments
Desktop: Manage inventory > Enter and edit receipts and adjustments

Date

Enter the date of a product inventory transaction. The Date field defaults to the current system date but can be overridden.

Transaction

Enter a transaction number when opening or editing a product inventory transaction. Transaction numbers are system generated when an inventory transaction is entered.

Invoice #

Enter an invoice number for a product inventory transaction. Using an invoice number from a vendor's invoice is recommended.

Description

Enter a brief description of the product inventory transaction.

Posted

This option enables automatically when the selected inventory transaction has been posted.

Receipt

Enable to record an inventory receipt.

Inventory Adjustment

Enable to record an inventory adjustment rather than an inventory receipt. An inventory adjustment will affect a product's Qty on Hand as displayed on the Manage products window (from Orders, select Manage inventory> Manage products).

Transfer

(Multi-Warehouses only) Enable to transfer product inventory from one warehouse to another. The Transfer option displays only if the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

The following fields display when the Transfer option is enabled:

- From Warehouse – Replaces the Warehouse field
- Bin (From Warehouse)
- To Warehouse
- Bin (To Warehouse)

Product

Enter the product code for which you are entering an inventory transaction (select the Find icon to look up a product code). Inventory transactions can be entered only for products that have an Active, Inactive, or Out of Production status.

Warehouse

(Required/Displays for Multi-Warehouses only) Enter the warehouse for which you are entering a product inventory receipt or adjustment. The Warehouse field is a required

field and defaults to a product's Default Warehouse on the Manage products window, but it can be overridden.

Select the Find icon to look up a warehouse; warehouses are defined on the LOCATION general lookup/validation table.

From Warehouse

(Replaces the Warehouse field when the Transfer option is enabled) Enter the warehouse from which you are transferring a product's inventory. The From Warehouse field is a required field and defaults to a product's Default Warehouse on the Manage products window, but it can be overridden to another warehouse that has the same product in stock.

Select the Find icon to look up a warehouse; warehouses are defined on the LOCATION general lookup/validation table.

Bin

(Displays for Multi-Warehouses only) Enter the warehouse bin for which you are entering a product inventory receipt or adjustment, or enter the warehouse bin from where you are transferring a product's inventory. The Bin field defaults to the bin defined for the Default Warehouse, but it can be overridden for any bin (the bin does not have to be pre-defined) when recording inventory transactions.

To Warehouse

(Displays only when the Transfer option is enabled) Enter the warehouse to which you are transferring a product's inventory (this warehouse must be pre-defined for the product). The To Warehouse field is a required field for inventory transfers.

Select the Find icon to look up a warehouse; warehouses are defined on a product's Warehouses window.

Bin

(Displays only when the Transfer option is enabled) Enter the warehouse bin to which you are transferring a product's inventory. The Bin field defaults to the bin defined for a warehouse on the Warehouses window, but it can be overridden.

If you update a To Warehouse's Bin field, the Bin field on the Warehouses window will be updated for that particular warehouse.

Status

(read only) Displays the product's status. Product inventory receipts, adjustments, and transfers can be entered only for products that have an Active, Inactive, or Out of Production status. See Product Status Codes for more on product status codes.

Description

(read only) Displays a description of the product entered in the Product field. The value that displays in the Description field is the value entered in the Title field on the Manage products window.

Quantity

Enter the number of products involved in the inventory transaction. The following stipulations exist depending on transaction type:

- Receipt – A negative value cannot be entered for an inventory receipt.
- Inventory Adjustment – No stipulations.
- Transfer – A negative value cannot be entered for an inventory transfer, and the value entered in the Quantity field cannot exceed a From Warehouse's available inventory quantity.

Unit Cost

Enter the per-unit cost of a product. For inventory receipts and adjustments, the Unit Cost field defaults to the value displayed in the Last Cost field on a product's Inventory window. You can override a product's unit cost as necessary.

For inventory transfers, the Unit Cost field is display only and cannot be edited. The value that displays in the Unit Cost field depends on the Valuation Method selected on the Inventory System Setup window:

- Standard Cost valuation method
- If the From Warehouse's total product cost equals zero, then the value displayed in the Unit Cost field will be zero.
- If both the From Warehouse's total product cost and standard product cost are greater than zero, then the value displayed in the Unit Cost field will equal a product's standard cost.
- If none of the above are true, then the value displayed in the Unit Cost field will equal a product's average cost.
- Average valuation method
- If the From Warehouse's total product cost equals zero, then the value displayed in the Unit Cost field will equal zero.
- If the From Warehouse's total product cost does not equal zero, then the value displayed in the Unit Cost field will equal the average product cost.

Ext Amt

(read only) Displays the system-generated extended amount of a product's cost, which is the product Quantity times the product Unit Cost.

Product Inventory

(read only) Displays all of the product line-items for which you entered inventory transactions.

Inventory Transactions

(read only) Displays all of the product inventory transactions processed during the current session.

Fundraising

Enter and edit gifts

A donation is recorded as a gift when it is accompanied by a full payment. A donation is recorded as a pledge if it is not accompanied by a full payment.

To enter a single gift or pledge

Payments for single gifts must be made at the time the gift is entered. You can enter payment for a single gift by entering a check number, credit card number, or an in-kind non-cash asset account (if you are entering an in-kind or asset contribution), or by applying an open credit.

A pledge is a donation to be paid at a later date and can be a single pledge or an installment pledge.

Note: In-kind contributions can only be made for gifts. iMIS Fundraising does not track single in-kind pledges or installment in-kind pledges.

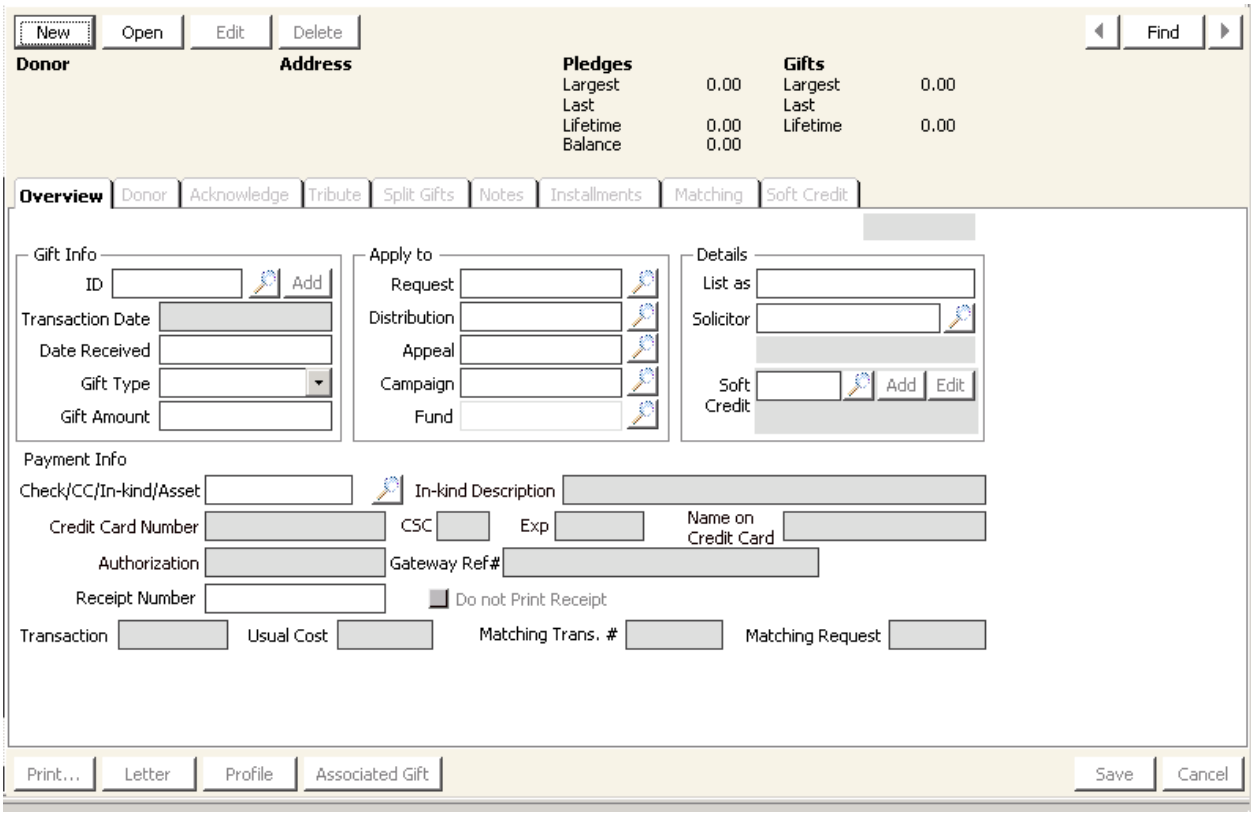
1. From Enter and edit gifts window, click New.
2. Enter the donor ID, or click the lookup icon to select an ID.

   The donor's name and address information are displayed in the Donor and Address areas.
3. Enter the date the gift was received in the Date Received field.
4. Select Single Pledge or Single Gift from the Gift Type drop-down list.
5. Enter the total amount of the donation in the Gift Amount field.
6. Enter the Request, Distribution, Appeal, Campaign, and Fund information as necessary.
7. (optional) Enter the List as name.
8. (optional) Enter the Solicitor ID, or click the lookup icon to select a solicitor ID.
9. (optional) If there is an individual partially responsible for this donation who is not the

donor, enter the Soft Credit ID, or click the lookup icon to select a soft credit ID.

10. For Single Gifts only:
    1. Enter the payment information in the Check #/CC/In-kind/Asset field and its related fields as appropriate.
    2. (optional) Enter a manual receipt number in the Receipt Number field.
    3. (optional) Enable the Do not Print Receipt option to skip the printing of a receipt for this gift.
11. Click Save.

Enter and edit gifts window



Admin Console: Home > Fundraising > Enter and edit gifts
Desktop: Fundraising > Enter and edit gifts

The Overview tab on the Enter and edit gifts window uses the following fields and data entry procedures.

Donor area

Displays the current donor's ID, name, title, and home phone number.

Address area

Displays the current donor's company name and preferred mail address.

Pledges area

Displays the following information about the current donor's pledges:

- Largest – Displays the amount of the donor's largest pledge.
- Last – Displays the date of the donor's last pledge.
- Lifetime – Displays the total amount of all of the donor's pledges.
- Balance – Displays the donor's current pledge balance.

Gifts area

Displays the following information about the current donor's gifts:

- Largest – Displays the amount of the donor's largest gift.
- Last – Displays the date of the donor's last gift.
- Lifetime – Displays the total amount of all of the donor's gifts.

Gift entry mode area

Standard Gift Entry Mode or Rapid Gift Entry Mode displays to indicate the current gift entry mode. Allow for Rapid Gift Entry must be enabled to make this feature available. Rapid gift entry can also be done in the rapid gift entry form accessed by the Rapid gift entry option in the Fundraising menu (Fundraising > Rapid gift entry).

ID

Specifies the iMIS ID of the individual making the gift or pledge.

- Add – Adds contact information about a new donor to the iMIS database. See Adding a Donor Record for information on adding a donor record.

  Transaction Date

  (read only) Displays the batch date if batch control is enabled, otherwise displays the current date.

  Date Received

  Enter the date that the pledge was made or that the money for the gift was actually received by. The default date is the batch date (if batch control is enabled) or the current system date.

  Gift Type

  (required) Select the gift type from the drop-down list of gift types, which include the following:

- Single Gift – (Default) Payment of cash, asset, or in-kind donation that has already been received. If Single Gift type is selected, the Installment tab is disabled.
- Single Pledge – A commitment by a donor to make a one-time contribution sometime in the future.
- Installment – A contribution paid in a series of payments over time, for example, a quarterly installment, which is paid four times over a specified period of time, such as a year.

  Gift Amount

  Enter the total amount of the gift or pledge.

  Request

  (optional) Enter any requests associated with the gift or pledge, or click the lookup icon to list all of the requests for the current donor that have not yet been assigned to a gift record.

If you select a request, the amount of the requested contribution that was entered in the Request Entry window is displayed in the Gift Amount field. You can override this by entering a different amount in the Gift Amount field.

Distribution

Enter the distribution or premium associated with the gift or pledge, or click the lookup icon to list all of the currently defined distribution and premium codes.

Although the distribution has been predefined, you can override the distribution by manually entering a different combination of appeal, campaign, or fund if the Allow free entry of Fund option is enabled by your administrator.

The Distribution field is disabled if a split gift is being entered.

Appeal

(optional) Enter the appeal associated with the gift or pledge, or click the lookup icon to list all of the currently defined Appeal codes. If Campaign and Fund codes are set for the selected Appeal code, these fields are automatically populated with these values.

Campaign

(optional) Enter the campaign associated with the gift or pledge, or click the lookup icon to list all of the currently defined Campaign codes. If a Fund code is set for the selected Campaign code and the Fund field is enabled, the Fund field is populated with the set value.

Fund

(required) Enter the fund associated with the gift or pledge, or click the lookup icon to list all of the currently defined Fund codes. The fund associated with the distribution specified in the Distribution field automatically displays in this field, but can be overridden if the Allow free entry of Fund option is enabled by your administrator.

The Fund field is disabled if a split gift is being entered or if the Allow free entry of Fund option is disabled by your administrator.

List as

(optional) Enter the name that the donor is to be “listed as” on all reports and acknowledgements for the gift or pledge. The default List as value is set on the Donor Data tab on the Manage customers window (from Customers, select Manage customers, open a customer record, and select the Donor Data tab); you can override this value.

If you override the List as value in this field, the List as value specified in the Donor Data tab on the Manage customers window is not changed.

Solicitor

(optional) Enter the ID of the individual who obtained the gift or pledge, or click the lookup icon to list all of the customer records that have the Solicitor option enabled (from Customers, select Manage customers, open a customer record, and select Solicitor Data). The default Solicitor value for a customer ID is set on the Donor Data tab on the Manage customers window (from Customers, select Manage customers, open a customer record, and select the Donor Data tab); you can override this value.

Note: When you click the lookup icon, company IDs are listed alphabetically and then individual IDs are listed alphabetically.

Soft Credit

(optional) Enter the ID of the individual who will receive credit for the donation, but who is not the primary donor, or click the lookup icon to select an ID. This information displays in the Fundraising History window. The following buttons are associated with this field:

- Add – Enables you to display the Gift - Name/Address - Soft Credit window to enter a new customer record for the individual receiving the soft credit. The data you enter in this window is inserted in the customer database. You can select the customer or non-customer type for this customer record from the Customer Type drop-down list.
- Edit – Enables you to display the Gift - Name/Address - Soft Credit window to edit the customer record for the individual receiving the soft credit. The data entered here is inserted in the customer database.

See Gift - Name/Address - Soft Credit window for information on the Gift - Name/Address - Soft Credit window.

Check #/CC/In-kind/Asset

Enter the type of payment transaction, such as cash, check, credit/debit card payment, in-kind gift, or asset, or click the lookup icon to select the kind of transaction. This field is only enabled for the Single Gift and Installment gift types.

You can use an existing AR/Cash or Fundraising credit to make a gift payment or installment pledge down payment by entering an asterisk (*) and pressing Tab. This will display a list of all open credits for the donor ID, with an option to view all open credits for all IDs.

In-kind Description

(optional) Enter the description of the in-kind gift. This field is only enabled if INKIND is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Note: The INKIND cash account is set up in AR/Cash (AR/Cash > Cash Accounts).

Credit Card Number

(Required for credit/debit card transactions) Enter the card number. This field is disabled until a valid credit/debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

CSC

(Optional for credit/debit card transactions – displays only when the associated card authorization account accepts a CSC number for immediate or deferred authorization) Enter the card CSC number. This field is disabled until a valid credit/debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Expiration Date

(Required for credit/debit card transactions) Enter the expiration date (in MM/YY format) of the card. This field is disabled until a valid credit/debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Name on Credit Card

(Required for credit/debit card transactions) Enter the name of the individual on the card. This field is disabled until a valid credit/debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Authorization

(Required for credit/debit card transactions) Enter the authorization code for the card payment. This field is disabled until a valid credit/debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Issue #

(Optional for European debit card transactions – displays only when the associated cash account accepts an issue number) Enter the European debit card issue number. This field is disabled until a valid European debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Issue Date

(Optional for European debit card transactions – displays only when the associated cash account accepts an issue date) Enter the European debit card issue date (in MM/YY format). This field is disabled until a valid European debit card type is entered in the Check #/CC/In-kind/Asset field and Tab is pressed.

Receipt Number

(optional) Manually enter a unique receipt number. When a receipt number is entered manually, the Do not Print Receipt field is automatically enabled. This field is only enabled for the Single Gift type. You cannot edit a gift associated with a manual receipt after the gift has been saved.

Do not print receipt

If this option is enabled, a receipt will not be printed for the current gift in the Generate Receipt process. This field is only enabled if Single Gift is selected as the gift type.

Receipt Date

Figure 1: EnterEditGifts

(if a receipt was issued) The date on which the first receipt for this gift or pledge was issued. This field is only enabled if Single Gift is selected as the gift type.

Transaction

(read only) The transaction number associated with the gift or pledge displays in this field when you click Save or when a record is loaded.

Usual Cost

(read only) If a Distribution code is entered, the usual amount donated for the Distribution displays.

Matching Transaction

(read only) If a company matches the donations of its employees, the transaction number of the company's matching donation for the employee donation displays, and vice versa.

Note: Matching Transaction is updated if the Create Matching Pledge option is enabled in Fundraising > Set up module. In this case, a single pledge is automatically created in the record of the Company.

Matching Request

Displays the transaction number associated with the matching request (applies only to matching gifts). If the Create Matching Pledge option is not enabled by your administrator and a matching plan is assigned to an employee, a matching request (rather than a matching transaction) is created for the employer. When the employer is later ready to commit to a donation, a gift based on this matching request can be created.

Note: Matching Request is updated if Create Matching Pledge option is disabled in Fundraising > Set up module. In this case, a request activity is automatically generated in the record of the Company.

Associated Gift

Displays any matching transaction on the Overview tab in the Enter and edit gifts window. This button is only enabled if there is a matching transaction and the Enter and edit gifts window is not in data entry mode.

Clicking Associated Gift changes the label of the matching transaction field. If the employer's matching donation is displayed, the matching transaction field will be labeled Original Transaction because this field displays the transaction number of the donor who gave the original gift. If the original employee donation is displayed, the field label will remain Matching Transaction.

Enable/Disable Rapid Gift Entry

Activates rapid gift entry. This button only displays if the Allow Rapid Gift Entry option is enabled by your administrator. This rapid gift entry feature is available in the Enter and edit gifts window only. Alternatively, you could use Rapid gift entry available on the left menu of Fundraising. This form supports quick entry of several gifts or pledges at the same time.

Generic checkbox

A generic check box has been added to the Enter and edit gifts window (Fundraising > Enter and edit gifts). You can use this checkbox for your own purposes. For example, you could label the checkbox as No Gift Aid so that you can designate the gift as not eligible for Gift Aid in the U.K. Or you could create a label that enables you to report on a particular type of donor or transaction.

Enable this check box on the Fundraising Setup module window in the multi-use Checkbox label field (Fundraising > Set up module). You must provide a label to place this checkbox on the Enter and edit gifts window.

Process gift payments

With iMIS Fundraising you can make payments for pledges in the Process payments window and the AR/Cash Enter and edit cash receipts window.

When making a payment in the Process payments window, you can specify a payer ID other than the donor ID for the payment.

The primary benefit of making payments in the Enter and edit cash receipts window is that you can pay for other items in addition to fundraising pledges, while the Process payments window can only be used for paying pledges.

To enter a payment in Fundraising

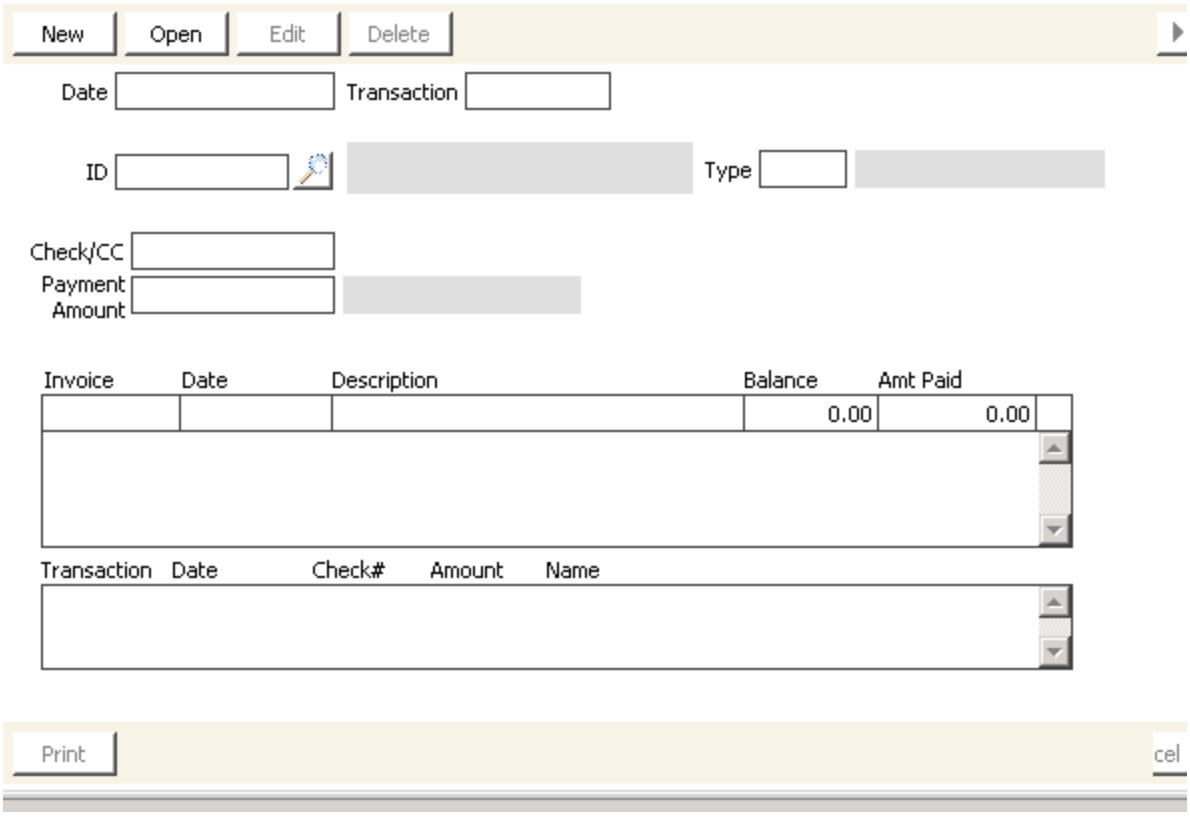
1. From Process gift payments window, click New.
2. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID, and press Tab. The existing pledges for the donor display.
3. (optional) Enter the payer ID in the Payer field if someone other than the donor is making the payment, or click the lookup icon to select a payer ID.
4. Enter CASH, the check number, a valid credit/debit card type, or *Tab (to apply an open credit for the payment) in the Check/CC field. If you entered a valid credit/debit card type in the Check/CC field, enter the following information:

- CC # – Enter the credit/debit card number.
- CSC – (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp – Enter the card's expiration month and year (mm/yy).
- Authorize – Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC – Enter the name as it appears on the card.
- Issue # – (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date – (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).

Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

5. Enter the Payment Amount.
6. Select a line item and enter the Amt Paid or double-click a pledge line item to pay the full amount for the pledge line item. To apply the payment to multiple pledge line items, select each pledge line item and enter the amount to be paid in the Amt Paid field, or double-click a pledge line item to pay the full amount for the pledge line item.
7. Click Save.

Process gift payments window



Admin Console: Home > Fundraising > Process gift payments
Desktop: Fundraising > Process payments

Date

iMIS automatically enters either the batch date (if batch control is enabled) or the current system date. If batch control is not enabled, you can override the date by entering a different date in the Date field.

Note: If you are using batch control, the Date field defaults to the active batch date, which cannot be overridden.

Transaction

You can click Open and enter the transaction number of an existing payment to open the payment record. After a payment has been saved, the transaction number of the payment displays in this field and the transaction number cannot be changed.

Invoice Number

An invoice number is automatically assigned when a payment transaction is invoiced, or you can manually enter an invoice number while entering a new payment.

ID

Enter the donor's ID, or click the lookup icon to select a donor ID. After you enter the ID, the line items and total outstanding balance for the donor display.

Type

Displays the donor's customer type.

Payer

(optional) Enter the payer's ID if someone other than the donor is making the payment, or click the lookup icon to select a payer ID. This field only displays if the Allow Separate Payer for Payments option is enabled by your administrator.

When you enter a payment using a separate payer ID, iMIS automatically creates the necessary transactions to ensure that the appropriate individual receives the credit for the payment. The Payer ID (Payer is the default label for the individual making the payment against a pledge initiated by another individual) corresponds to the BT_ID and the pledge owner's ID corresponds to the ST_ID. iMIS also updates the Fundraising and AR/Cash

tabs on the Manage customers window of the pledge owner to display the separate payer payment information.

Receipts and thank you letters for gifts entered using a separate payer are sent to the separate payer. Acknowledgement letters are sent to the pledge owner informing them that someone else has paid the pledge.

Type

Displays the payer's customer type.

Check/CC

Enter CASH if the payment is in cash, the check number if payment is by check, the credit/debit card code if payment is by credit/debit card, or enter an asterisk (*) and then press Tab to apply an open credit as payment.

If you enter a valid credit/debit card code, additional payment fields display:

- CC # – Enter the credit/debit card number.
- CSC – (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp – Enter the card's expiration month and year (mm/yy).
- Authorize – Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC – Enter the name as it appears on the payment card.
- Issue # – (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date – (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).

- Gateway Ref # – Read only: Populates when the gateway provider returns the reference number for the transaction.

  Note: If Advanced PCI Compliance> Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  If you enter an asterisk (*) and press Tab to apply an open credit, the Select Open Payments window opens. Select an open credit and click OK. Open credits for split gifts or accrual dues are not displayed and cannot be used for a gift payment or an installment pledge down payment.

  The selected individual open credit must be equal to or greater than the gift amount. For example, if the gift amount is $100 and there are two separate $50 open credits, these open credits cannot be applied as a gift payment. However, you can use AR/Cash to debit one open credit and credit the other, thereby creating a single $100 open credit that can then be used for the gift payment or installment pledge down payment.

  If you apply an open credit as payment, the payment is not posted to the open credit invoice even if the Separate Posting Cycle Required option is disabled.

  Payment Amount

  Enter the amount of the payment.

  Note: iMIS Fundraising does not allow in-kind payments for pledges.

  Invoice

  Displays the invoice number.

  Date

  Displays the payment date.

  Description

  Displays the payment description.

  Balance

Displays the balance of the currently selected pledge.

Amt Paid

Displays the amount being paid for the currently selected pledge after you enter the Payment Amount. You can override the value in the Amt Paid field (for example, to apply part of the Payment Amount to another pledge).

Transaction

Displays the transaction number.

Date

Displays the transaction date.

Check #

Displays the check number.

Amount

Displays the amount paid.

Name

Displays the donor name.

Enter and edit pledge credit memos

To enter a pledge credit memo

1. From Enter and edit pledge credit memos window, click New.
2. The Date field defaults to:

- The batch date if batch control is enabled. If an active, open batch is not selected, the Open Batches window opens. After selecting or creating a batch, click New on the Enter and edit pledge credit memos window again.
- The system date if batch control is not enabled. If you override the system date, the new

date becomes the default date for new credit memos until the Enter and edit pledge credit memos window is closed and reopened.

3. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID, and press Tab. After the ID field is populated and Tab is pressed, an address block for the customer displays in the Enter and edit pledge credit memos window and the Type and Status fields are populated.
4. Click Find Pledge to display the Find window.
5. Select the pledge to be adjusted and click OK.
6. Use one of the following methods to specify the credit memo adjustment:

- Click Adjust All to issue a credit memo against all installments associated with a pledge that have a non-zero balance.
- Select the Credit checkbox to credit specific line items. For example, enable the Credit option for invoice number R65 and the full amount displays in the Amount Adj field for this invoice number.

7. Enter the amount to credit in the Amount Adj field for the line item. For example, enter 25.00 in the Amount Adj field for invoice number R64 and press Tab. This will automatically enable the Credit checkbox for this line item.
8. Click Save. The total amount of the credit memo displays in the Total Adjustment field.

   Note: Line items that were not adjusted are no longer displayed in the Enter and edit pledge credit memos window after you click Save.

   To apply credit memos to multiple funds

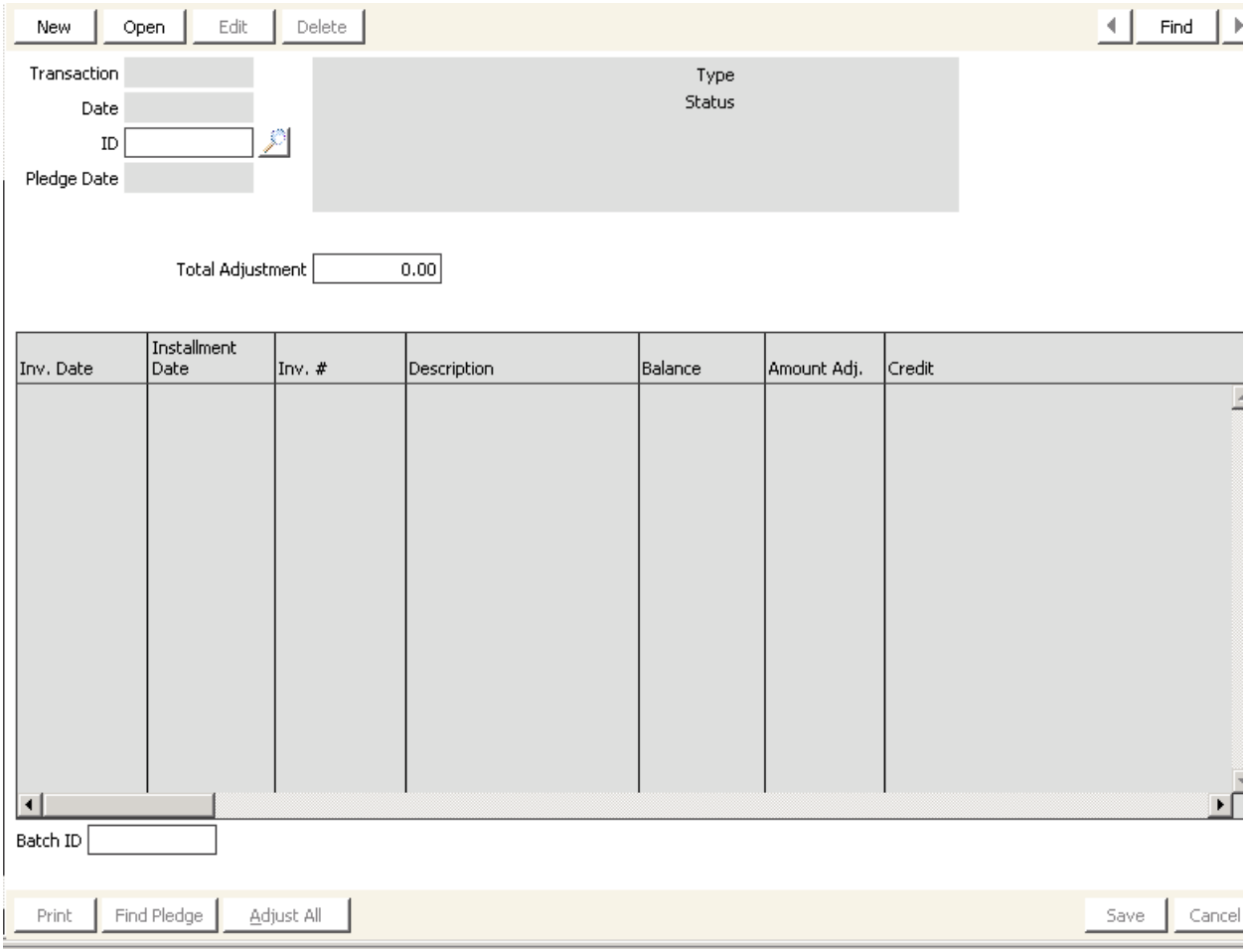
   To apply credit memo adjustments to multiple funds for a split gift, use the AR/Cash Enter and edit credit memos window.

1. From Enter and edit pledge credit memos window, click New.

2. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID.
3. Enter the transaction number in the Invoice# field and press Tab, or press Ctrl+L to look up a transaction number. The split gifts per fund pertaining to this gift or pledge display.
4. Enter the distribution or premium code in the Product field, or click the lookup icon to select a distribution or premium, and press Tab.

   Note: If more than one distribution is assigned to the same fund, only one line displays for the fund, showing the combined charges for these distributions. You must know the distribution or premium code that you wish to adjust and its value per the installment invoice.
5. Enter 1 in the Quantity field.
6. Enter the credit memo adjustment amount in the Unit Price field.
7. (optional) Repeat to apply a credit memo adjustment to additional distributions or premiums.
8. Click Save.

Enter and edit pledge credit memos window



Admin Console: Home > Fundraising > Enter and edit pledge credit memos
Desktop: Fundraising > Enter and edit adjustments > Pledge credit memos

Transaction

Displays the completed transaction number. You can click Open and enter the transaction number to look up an existing credit memo transaction.

Date

Displays the batch date or current system date. You can override this date if batch control is not enabled. You can click Open and enter the transaction date to look up an existing credit memo transaction.

ID

Enter the ID of the customer whose record is being adjusted.

Pledge Date

Displays the date of the selected pledge.

Current Pledge Balance

Displays the total balance due for all installment invoices.

Total Adjustment

Displays the total amount of the pledge credit memo adjustment for the selected line items.

Adjusted Pledge Balance

Displays the remaining pledge balance after the pledge credit memo adjustment (the difference between the Current Pledge Balance and Total Adjustment fields).

Inv Date

Displays the invoice date of the pledge transaction (displays all Invoice.INVOICE_DATE fields associated with the Transaction).

Installment Date

Displays the date of each installment transaction (displays all Invoice.INSTALL_BILL_DATE fields associated with the Transaction).

Inv #

Displays the invoice number of each installment transaction (displays all Invoice.INVOICE_NUM (if non-zero, else a concatenation of 'R' and Invoice.REFERENCE_NUM) fields associated with the Transaction).

Description

Displays a description of the pledge transaction (displays all Invoice.DESCRIPTION fields associated with the Transaction).

Balance

Displays all Invoice.BALANCE fields associated with the Transaction.

Amount Adj

This is the dollar amount to be adjusted from this line item. Entering an amount in this field automatically enables the Credit checkbox.

Credit

Enable this checkbox for the line item that will receive the credit memo. If you enter an amount in the Amount Adj field and press Tab, the Credit checkbox is automatically enabled. If you enable this checkbox without entering a value in the Amount Adj field, the Amount Adj field is automatically populated to offset the remaining pledge installment balance, resulting in a net pledge installment balance of zero.

Batch ID

Displays the ID of the batch associated with the selected line item if batch control is enabled.

Find Pledge

Enables you to find the pledges for the current donor ID. This button is only enabled after clicking New and entering a donor ID.

- Pledge Date

  Displays the Invoice.INVOICE_DATE of any invoice with common Invoice.ORIGINATING_TRANS_Nums.

- Trans #

  Displays the Invoice.OPRIGINATING_TRANS_NUM for the pledge.

- Description

  Displays the word Pledge.

- Balance

Displays the sum of Invoice.BALANCE for all invoice records equal to the Invoice.ORIGINATING_TRANS_NUM.

Line items are summary information and are displayed in descending order by Pledge Date and then in descending order by Trans # within date from the following:

- Invoice.SOURCE_SYSTEM is equal to FR.
- Invoice.INSTALL_BILL_DATE is not null.
- Invoice.ORIGINATING_TRANS_NUM is the same for all Trans #s.

Adjust All

Enables you to issue a credit memo against all installments associated with a pledge that have a non-zero balance.

Enter and edit pledge debit memos

Debit memos have the opposite effect of credit memos, increasing the balance of open accounts receivable items.

Use debit memos for the following tasks:

- To increase or add a line item charge
- To bring a credit balance to zero due to an overpayment, credit memo, or cancellation transaction

To enter a pledge debit memo

1. From Enter and edit Pledge debit memos window, click New.
2. The Date field defaults to one of the following:

- If batch control is enabled, the Date field defaults to the batch date. If an active, open batch is not selected, the Open Batches window opens. After selecting or creating a batch, click New on the Enter and edit pledge debit memos window again. You cannot override the date if batch control is enabled.

- If batch control is not enabled, the Date field defaults to the system date. You can override this date. If you override the system date, the new date becomes the default date for new debit memos until the Enter and edit pledge debit memos window is closed and reopened.

3. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID, and press Tab. After the ID field is populated, an address block for the customer displays in the Enter and edit pledge debit memos window and the Type and Status fields are populated.
4. Click Find Pledge to display the Find window.
5. Select the pledge installment for the pledge debit memo adjustment.
6. Click OK.
7. Use one of the following methods to specify the debit memo adjustment:

- Click Adjust All to select all line items with a balance to debit. The full amount displays in the Amount Adj field for each line item, the Debit checkbox is selected for each line item with a balance, and the total amount of all debit memo adjustments displays in the Total Adjustment field. The Adjust All button is only enabled if the total pledge balance is negative.
- Select the Debit checkbox to debit specific line items. For example, enable the Debit checkbox for invoice number R65 and the full amount displays in the Amount Adj field for this invoice number.
- Enter the amount to debit in the Amount Adj field for the line item. For example, enter 25.00 in the Amount Adj field for invoice number R64. This will automatically enable the Debit option for this line item.

8. Click Save. The total amount of the debit memo displays in the Total Adjustment field.

   Note: Line items that were not adjusted are no longer displayed in the Enter and edit pledge debit memos window after you click Save.

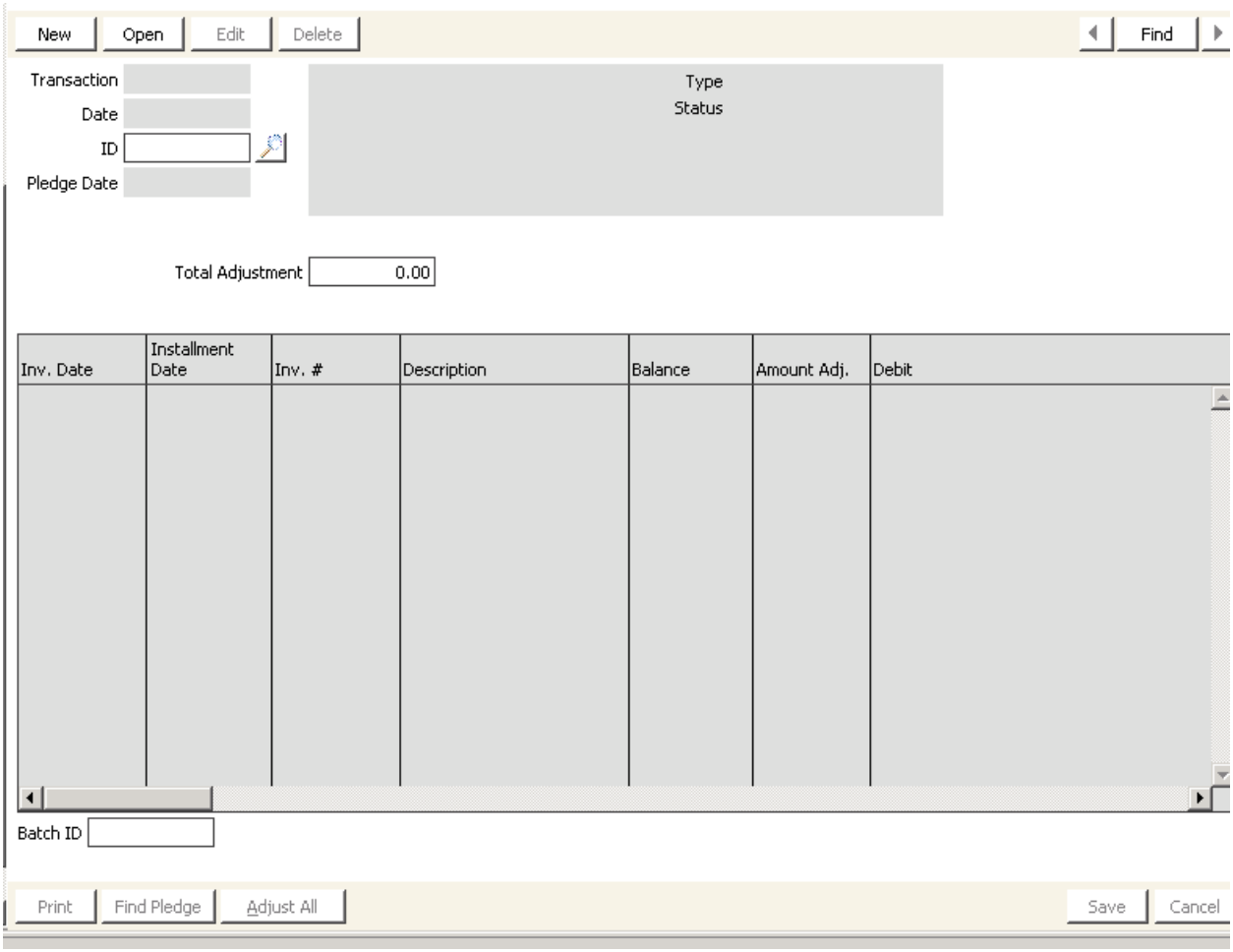
   To apply debit memos to multiple funds

To apply a debit memo to multiple funds for a split gift, use the AR/Cash Enter and edit debit memos window.

1. From Enter and edit debit memos window, click New.
2. Enter the donor ID in the ID field, or click the lookup icon to select a donor ID.
3. Enter the transaction number in the Invoice# field and press Tab. The split gifts per fund for the transaction display.
4. Enter the distribution or premium code in the Product field, or click the lookup icon to select a distribution or premium, and press Tab.

   Note: If more than one distribution is assigned to the same fund, only one line displays for the fund, showing the combined charges for these distributions. You must know the distribution or premium code that you wish to adjust and its value per the installment invoice.
5. Enter 1 in the Quantity field.
6. Enter the debit memo amount in the Unit Price field.
7. (optional) Repeat to apply the debit memo to additional distributions or premiums.
8. Click Save.

Enter and edit pledge debit memos window



Admin Console: Home > Fundraising > Enter and edit pledge debit memos
Desktop: Fundraising > Enter and edit adjustments > Pledge debit memos

Transaction

Displays the completed transaction number. You can click Open and enter the transaction number to look up an existing debit memo transaction.

Date

Displays the batch date or system date. You can override this date if batch control is not enabled. You can click Open and enter the transaction date to look up an existing debit memo transaction.

ID

Enter the ID of the customer whose record is being adjusted.

Pledge Date

Displays the date of the selected pledge.

Current Pledge Balance

Displays the total balance due for all installment invoices.

Total Adjustment

Displays the total amount of the pledge credit memo adjustment for the selected line items.

Adjusted Pledge Balance

Displays the remaining pledge balance after the pledge credit memo adjustment (the sum of the Current Pledge Balance and Total Adjustment fields).

Inv Date

Displays all Invoice.INVOICE_DATE fields associated with the Transaction.

Installment Date

Displays the date of each installment transaction (displays all Invoice.INSTALL_BILL_DATE fields associated with the Transaction).

Inv #

Displays the invoice number of each installment pledge transaction (displays all Invoice.INVOICE_NUM (if non-zero, else a concatenation of 'R' and Invoice.REFERENCE_NUM) fields associated with the Transaction).

Description

Displays a description of the pledge transaction (displays all Invoice.DESCRIPTION fields associated with the Transaction).

Balance

Displays all Invoice.BALANCE fields associated with the Transaction.

Amount Adj

This is the dollar amount to be adjusted from this line item. Entering an amount automatically enables the Credit checkbox.

Debit

Enable this checkbox for the line item that will receive the debit memo. If you enter an amount in the Amount Adj field and press Tab, the Debit checkbox is automatically enabled. If you enable this checkbox without entering a value in the Amount Adj field, the Amount Adj field is automatically populated to offset the remaining pledge installment balance, resulting in a net pledge installment balance of zero.

Batch ID

Displays the ID of the batch associated with the selected line item.

Find Pledge

Enables you to find the pledges for the current donor ID. This button is only enabled after clicking New and entering a donor ID.

Adjust All

Enables you to issue a debit memo against all installments associated with a pledge that have a non-zero balance. This button is only enabled when the total pledge balance is negative.

Manage requests

The iMIS request feature enables you to track activities such as telephone calls, letters, and notes that ask for a gift or pledge, and to associate donations with the requests that prompted them.

Requests can be entered using the Request Entry window or by using the Activity Importer. Once a request has been entered, it can be managed using the Manage requests window.

When entering a gift or pledge that is in response to a request, you can look up and select the appropriate request using the Request field on the Enter and edit gifts window. When you associate a request with a gift or pledge, any campaign, appeal, distribution, or fund information that was defined with the request is automatically entered for you.

Note: A request may only be associated with one gift or pledge. Once you associate a gift or pledge with a request, that request is no longer available for further gift entries.

To enter a request

1. From Manage requests window, click the Request Entry button at the bottom of the window to display the Request Entry window.
2. Click New.
3. (optional) Enter the transaction date in the Trans Date field. Although iMIS defaults to the system date, you can override this date by typing a different request activity date.
4. (required) Enter the donor's ID, or click the lookup icon to select an ID.
5. (required) Enter the type of request in the Request Type field, or click the lookup icon to select a request type.
6. If you need to maintain information associated with the request, enter this information in the Notes field.
7. (optional) Enter the solicitor ID in the Solicitor field, or click the lookup icon to select a solicitor name.
8. (optional) Enter the Distribution associated with the request, or click the lookup icon to select a distribution.
9. (optional) Enter the Campaign associated with the request activity, or click the lookup icon to select a campaign.
10. (optional) Enter the Appeal associated with the request, or click the lookup icon to select an appeal.

11. (optional) Enter the Fund associated with the request, or click the lookup icon to select a fund. The fund associated with the distribution specified in the Distribution field automatically displays in this field, but can be overridden.
12. (optional) Enter the Requested Amount.

    Note: The Gift Date and Gift Received fields are not populated until an actual gift or pledge is recorded as a result of the request. After the gift or pledge associated with the request is entered in the Enter and edit gifts window, the amount of the gift and the date it was received displays in these fields on the Request Entry window.
13. Click Save.

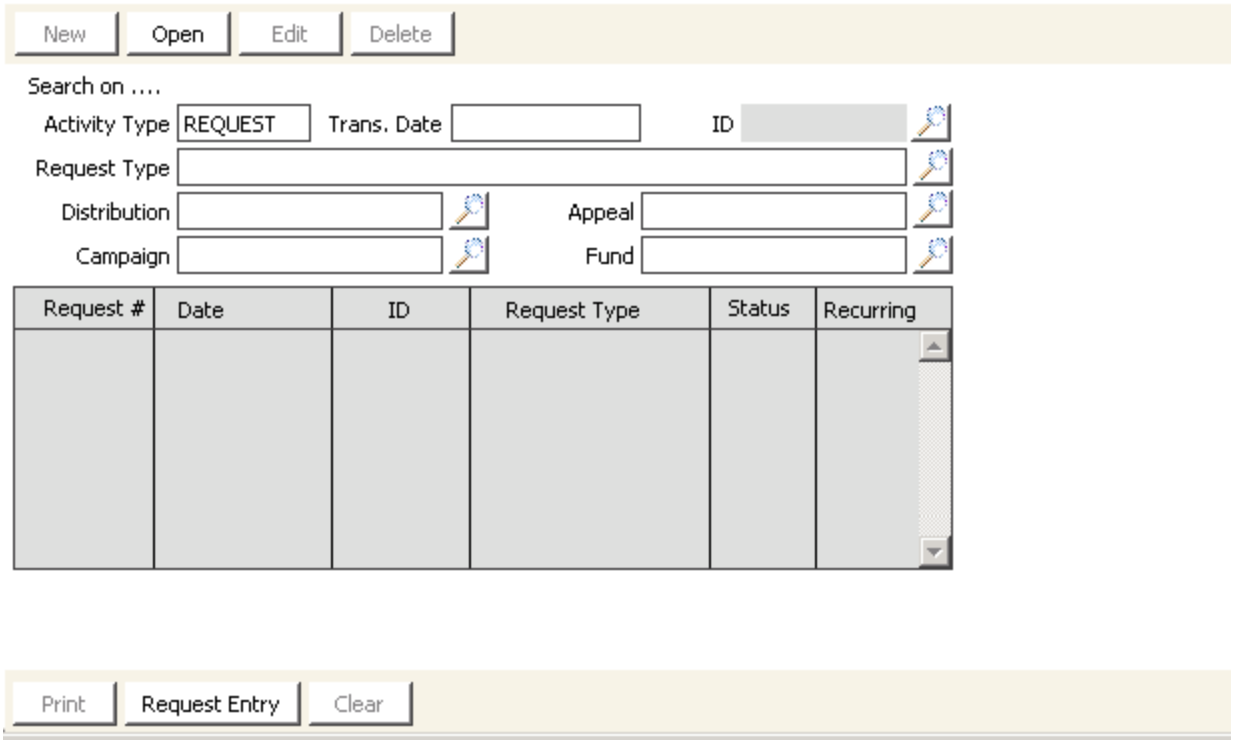
    To search for requests

1. From Manage requests window, click Open.
2. Enter the search criteria in the appropriate fields, or leave the fields blank and press Enter.

   All request records that meet the search criteria are shown in the window. A summary of activities related to each request is also shown.
3. Select a request in the Manage requests window and click Request Entry.

   The Request Entry window displays more details about the selected request.

Manage requests window



Admin Console: Home > Fundraising > Manage requests
Desktop: Fundraising > Manage requests

Activity Type

Displays the activity type Request.

Trans Date

(optional) Enter the transaction date of the request activities to search.

ID

(optional) Enter the customer ID associated with the request activities to search, or click the lookup icon to select an ID. You can select additional fields for a more specific search. For example, you could enter the customer ID and the Appeal to view all the individual's request activities related to the appeal (or fund, campaign, and so forth).

Request Type

(optional) Enter the type of request look for, or click the lookup icon to select a request type.

Distribution

(optional) Enter the distribution associated with the request, or click the lookup icon to select a distribution code.

Appeal

(optional) Enter the appeal associated with the request, or click the lookup icon to select an appeal code.

Campaign

(optional) Enter the campaign associated with the request, or click the lookup icon to select a campaign code.

Fund

(optional) Enter the fund associated with the request, or click the lookup icon to select a fund code.

Requests returned by search

The search returns requests that meet the search criteria. Each request line includes the following information:

- Request # – Displays the request number of each request.
- Date – Displays the date associated with a particular request.
- ID – Displays the ID the individual associated with the request.
- Request Type – Displays the request type of the request.
- Status – Displays the request status. Status can be either A (active) or I (inactive). Request status is changed to inactive when a gift is associated with the request or when the end date of the request is reached.
- Recurring – Displays a check mark for requests that are recurring.

Request Entry

Opens the Request Entry window.

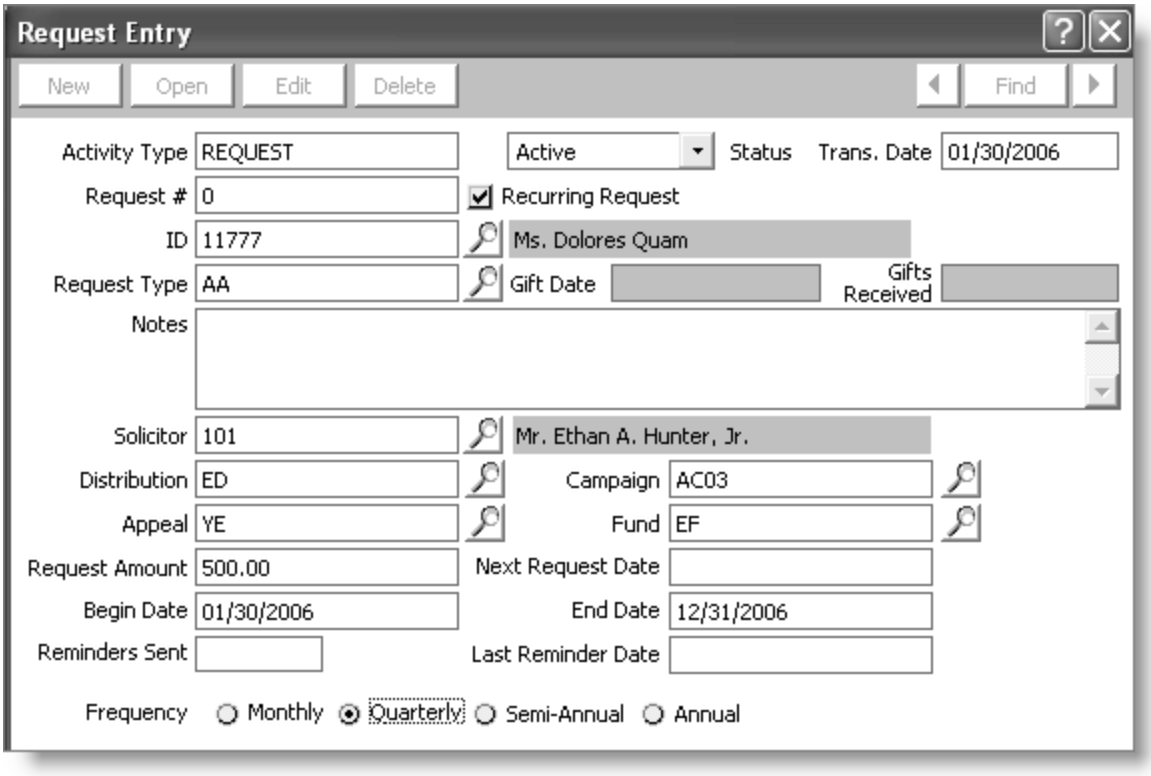
Clear

Clears all of the search fields.

Note: If you leave all of the search fields blank, all requests are displayed in the search results.

Request Entry window

The Request Entry window provides you with a means to manually generate individual requests.



Admin Console: Home > Fundraising > Manage requests, click Request Entry
Desktop: Fundraising > Manage requests, click Request Entry

Activity Type

Displays the activity type Request.

Status

Displays the request status. Requests that have no gifts or pledges associated with them have an Active status. Requests that have a gift or pledge associated with them are Inactive.

Trans Date

Displays the date of the request transaction. You can override the default date.

Request #

Displays the system-generated request number.

ID

Specifies the iMIS ID of the customer record associated with the request.

Recurring Request

Designates whether a request is recurring.

Request Type

Specifies the type of request.

Notes

Provides additional information about the request.

Solicitor

(optional) Specifies the solicitor ID associated with the request.

Distribution

(optional) Specifies the distribution associated with the request.

Campaign

(optional) Specifies the campaign associated with the request.

Appeal

(optional) Specifies the appeal associated with the request.

Fund

(optional) Specifies the fund associated with the request.The fund associated with the distribution specified in the Distribution field is automatically displayed in this field, but can be overridden.

Request Amount

(optional) Specifies the amount of money that was requested.

Next Request Date

Specifies the date the next request will be made.

Begin Date

Specifies the beginning date of the appeal.

End Date

(Recurring requests only) Specifies the end date of the appeal.

Reminders Sent

Specifies how many reminders have been sent.

Last Reminder Date

Specifies when the last reminder was sent.

Gift Date

Displays the date of the gift or pledge resulting from the request.

Gift Received

Displays the amount of the gift or pledge resulting from the request.

Frequency

(Recurring requests only) Designates how often the request is made using one of the following values:

- Monthly
- Quarterly
- Semi-Annual
- Annual

Enter and edit appeal expenses

You can track expenses associated with appeals to help determine how much money was raised with each appeal. Enter appeal expenses in the Set up appeal expenses window.

To add an appeal expense

1. From Enter and edit appeal expenses window, select the appeal.
2. Click New.
3. If the expense was incurred on a date other than the current system date, enter the date in the Date field.
4. Enter the expense Amount.
5. Enter the Expense Type, or click the lookup icon to select the expense type.
6. Enter the Campaign code, or click the lookup icon to select the campaign code.
7. Enter the Fund code, or click the lookup icon to select the fund code.
8. (optional) Enter a brief description of the expense in the Description area.
9. Click Save.

To edit an appeal expense

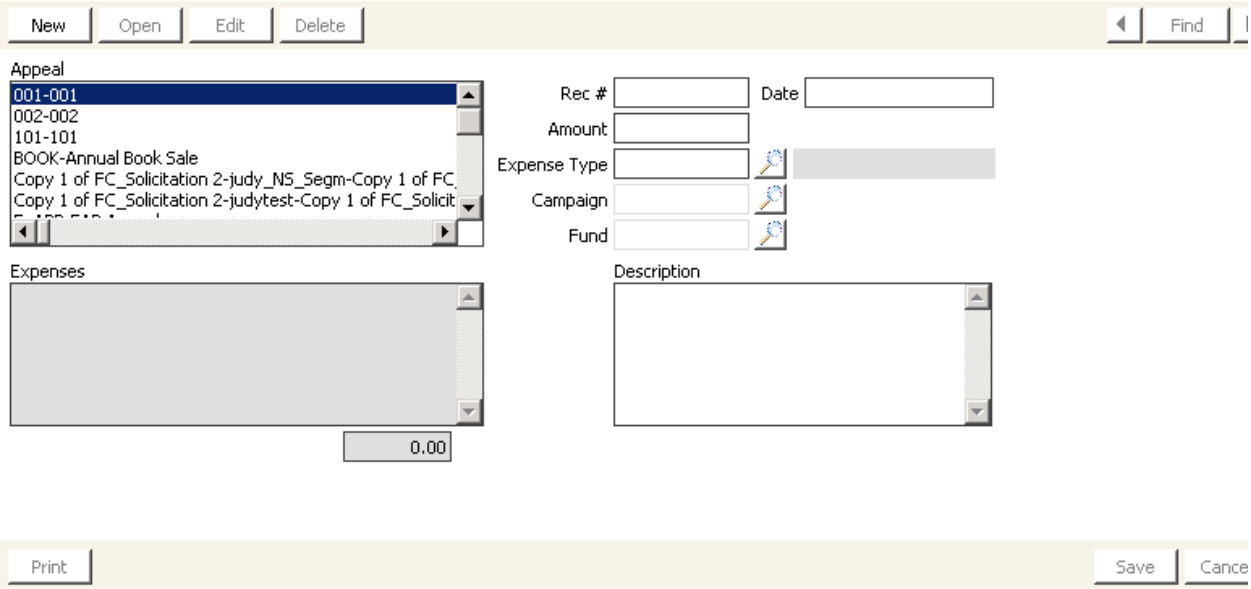
1. From Enter and edit appeal expenses window, select the appeal.
2. Select the expense to be edited.
3. Click Edit.

4. Make the changes to the appeal expense.
5. Click Save.

To delete an appeal expense

1. From Enter and edit appeal expenses window, select the appeal.
2. Select the appeal expense to be deleted.
3. Click Delete. A confirmation message displays.
4. Click Yes.

Enter and edit appeal expenses window



Admin Console: Home > Fundraising > Enter and edit appeal expenses
Desktop: Fundraising > Set up appeal expenses

Appeal

Lists all available appeals.

Rec #

Displays the number of the record associated with the appeal expense. For example, if this is the second appeal expense you entered, the number 2 displays in this field after you click Save.

Date

Displays the date the expense was entered. The default date is the current system date. You can override the date by entering a new date.

Amount

Enter the amount of the appeal expense.

Expense Type

Enter the type of expense associated with the appeal.

Campaign

(optional) Enter the campaign associated with the appeal expense. If a Campaign code is specified for the appeal, the Campaign field on the Set up appeal expenses window is automatically populated with this campaign code. You can enter a different Campaign code on the Set up appeal expenses window if needed.

Fund

Enter the fund associated with the appeal expense. If a Fund code is specified for the appeal, the Fund field on the Set up appeal expenses window is automatically populated with this fund code. You can enter a different Fund code on the Set up appeal expenses window if needed.

Expenses

Lists all expenses associated with the appeal.

Description

(optional) Enter a description of the appeal expense.

Process premiums

Use the Process premiums window to convert gift premiums into an order. You must first process a premium before it can be shipped to the customer.

When the premium is processed, it is converted into the order type specified in the Set up module window (from Fundraising, select Set up module and enter the Premium Order Type in the Premiums as Products area).

To process a premium

1. From Process premiums window, select one or more transactions and click Convert.
2. Click Yes to confirm.

Referrals

Manage referrals

To enter a referral

1. From Manage referrals window, click New.
2. Enter the client's full name, or if the client is already in the database, press Ctrl+L in one of the name fields to open the Find Referrals window, and find the client.
3. Enter the address, phone, and fax information (if not already populated by a Find).
4. Enter a Note if desired.
5. Enter information into the custom additional fields as needed. Use lookup (press Ctrl+L) in the fields for a list of available selections. If you do not alter the fields, they will simply populate with the default value you specified on the Set up module window.
6. If the Use Zip Areas option is enabled on the Set up module window, when you enter a value in the Zip field and press Tab, the City, St/Prov, and County fields are automatically populated with the appropriate value. Make changes to these values, if necessary.
7. Enter information in the other custom search fields where needed.
8. Click Search.

9. A list of providers displays in the lower half of the Manage referrals window. Select providers from this list as desired by double-clicking on them; an indicator (>) displays to the left of the provider record. To deselect providers, just double-click on them again to remove the indicator.

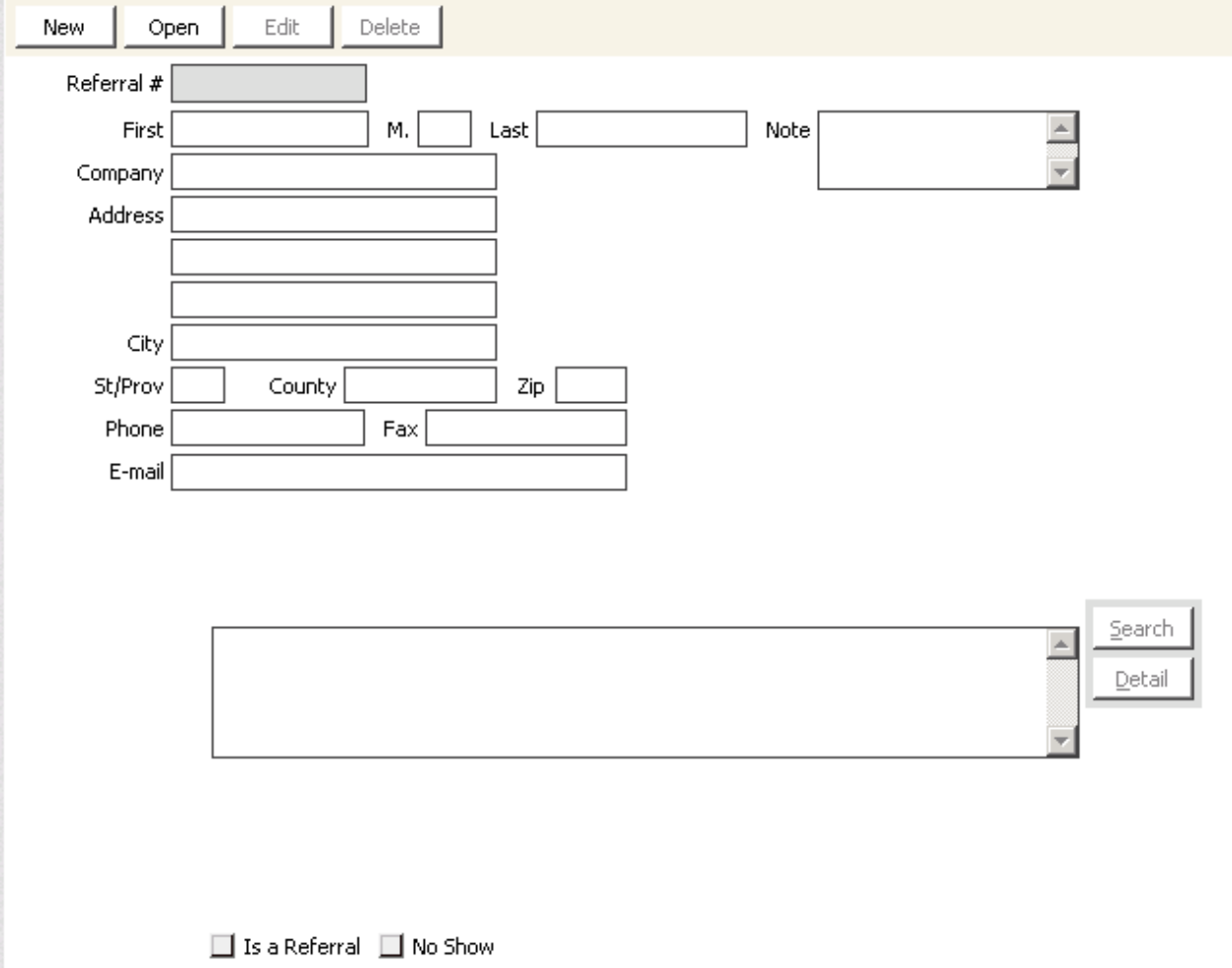
   If the list of providers is not satisfactory, narrow or broaden your search to receive the desired list. You are able to search as many times as you want before clicking Save.

10. (optional) Mark the referral as Ready to Invoice or Is A Referral. Depending on your organization, you may want to perform this step later.

11. Click Save to enter the transaction and have the system update the providers' referral records with the most recent referral date and time. The transaction data will be used when you generate letters to clients and providers, and it will be retained for your detail and summary reports.

    Note: If any of the providers you select do not meet the requirements of a provider (according to set up options), a message displays and iMIS will not allow you to select the provider.

Manage referrals window



Admin Console: Home > Referrals > Manage referrals
Desktop: Referrals > Manage referrals

Referral #

(read only) Displays the referral number. When you enter a new referral, this field is blank until you click Save. After you click Save, iMIS automatically generates a sequential number for the referral.

You can search for referrals by entering the Referral # in the Ref ID on the Find Referrals window.

First

Specifies the first name of the client requesting the referral, or use standard lookup (Ctrl+L) to retrieve an existing client.

Note: When you search for clients, you are not able to lookup individuals in the Name table, only Ref_Client. You will need to manually enter existing customers as clients.

Note: If you enter information for an existing client you will create a duplicate record.

Note: If you do not enter a name for the client, iMIS prompts you to confirm you entered the referral correctly.

M

Specifies the middle name of the client making the referral request, or use standard lookup (Ctrl+L) to retrieve an existing client.

Last

Specifies the last name of the client making the referral request, or use standard lookup (Ctrl+L) to retrieve an existing client.

Note: If you do not enter a Last name for the client, iMIS prompts you verify that you want to create a transaction without the Last name.

Company

Specifies the company name of the client making the referral request.

Address

Specifies the street address of the client making the referral request.

City

Specifies the city of the client making the referral request

St/Prov

Specifies the state or providence of the client making the referral request.

zip

Specifies the Zip code of the client making the referral request.

Phone

Specifies the telephone number of the client making the referral request.

Fax

Specifies the fax number of the client making the referral request.

E-mail

Specifies the e-mail address of the client making the referral request.

Note

Specifies any information related to the referral transaction.

Optional Fields

Specifies the codes for the client's responses, such as the source of the marketing program or contact type that generated their order. Standard lookup (Ctrl+L) is available.

Note: These optional fields are validated from the lookup tables you create on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation) and referenced on the Referrals Set up module window. Do not to enter data into the Expansion field for these validation tables.

Zip/Area

Optional search field. If you enable the Use Zip Areas option on the Set up module window, iMIS autofills this field with the client's zip code to restrict search to local providers. You can override the code or enter a 3-digit zip such as "787," which locates 78727, 78759, and 78702. You can also enter any zip code areas you defined in the REFERRAL_AREA table.

Note: At any time, you can override or clear the default value.

User-Defined Search Fields (Up to 5)

According to the Optional Search Fields you specify on the Set up module window, labeled text boxes display for the entry of match/search values to find candidates that meet the specified criteria. Depending upon the nature of the search field, it may be

appropriate to enter multiple search values, separated by commas. For example, a client looking for a CPA may specify a company/individual with expertise in both individual tax preparation and personal financial planning. In this case, it would find records with both areas indicated.

Provider List

A scrolling list of providers. The providers that display in the list depend on your search criteria.

As you choose referrals from the candidates listed, double-click on the lines in the scrolling list to mark them. When you double-click, an indicator (>) marks the line (left of the ID). This marking works as a toggle: double-click an unmarked line to mark it for referral; double-click a marked line to unmark (deselect) it.

Typically, you will mark the first three candidates in the returned list for a referral. However, you control which lines are marked, so you can select any number of records from any location in the list.

Search button

Used to search for providers according to your criteria.

Detail button

Opens the Provider Detail window where you can view details about a provider including contact information, overall status, and current referral status.

Is a Referral

Select this option to indicate that you are making a referral. The referral count for the selected provider will automatically be decreased, but any orders or invoices must be manually adjusted.

If you select a provider and do not select the Is a Referral option, iMIS displays a message informing you that to count your selection as a true referral, you must select the Is Referral option. If you do not select the option, iMIS saves the record as a non-referral.

Note: Whether or not you select Is A Referral will determine whether or not the referral count of the provider is affected.

No Show

Select this option to indicate that a client did not show up as scheduled. iMIS automatically does the following when you mark a referral as a no show:

- Decreases the provider's count
- Sets the LAST_REFERRED date in the Ref_Provider table to the date of the last referral if that date is earlier than the creation date of the referral at hand. If the date of the last referral is later than the referral at hand, it remains the LAST_REFERRED date.

  In either case, the referral record is maintained in the Referrals table. No shows are labeled as such in relevant reports such as the Daily Summary of Referrals.

Ready to Invoice

Select this option to indicate that reference fees can be processed for the specified referral.

Ref Fee

When you set up a sales product for referrals, you can specify default fee amounts. These values display in this field. You can override this value as long as the referral has not been invoiced.

Create referral orders

If you specify an additional fee product on the Referral Advanced Setup window, the Ref Fee and Ready to Invoice options display on the Manage referrals window to allow you to process reference fees that apply to successful referrals beyond the base referral subscription fee.

Perform the following tasks to process referral orders:

- Create referral orders
- Invoice open referral orders

- Enter payments for referral orders

To create a referral order

1. From Create referral orders, find the referral.
2. Select the Ready to Invoice option.
3. From Referrals, select Create referral orders to create orders for all referrals marked Ready to Invoice.

To invoice referral orders

Generating additional fee invoices occurs as a batch process that you handle through the Generate reports window. You invoice the referral fees for your subscribers directly from the iMIS Professional Referrals system.

Note: You cannot edit a referral order once it has been invoiced.

1. In Admin Console, go to Continuum > Membership Reports > Referral reports.
2. Select the Invoice report type.
3. Select the Print New Invoices report.
4. Click Run.

To enter payments for referrals

When you receive payments for referral services, you can enter them through AR/Cash as you would any other order.

1. In Admin Console, go to Accounting > Transactions > Enter and edit cash receipts.
2. Click New.
3. Enter the customer Id, or click the Find icon to select a value. You can also enter the Invoice Number.
4. In the Check/CC field, enter the check number or credit card type, and press Tab.

5. Enter the Payment Amount, and press Tab.
6. Select one of the following transaction options:

- To apply cash to an item, double-click on the item in the list and enter the amount to apply to the item in the Amt Paid field.
- To partially apply cash to an item, select the line and enter the amount to apply to the item in the Amt Paid field.

7. Click Save.

Delete expired items

To determine whether a referral record should be deleted, iMIS compares the date you enter in the Older Than field on the Delete Old Referrals Referral Dialog window to the Referral.DATE_CREATED, Ref_Provider.LAST_REFERRED, and Ref_Client.DATE_CREATED values for each referral record.

To delete expired items

1. From Delete expired items, click Delete Expired Referrals.
2. Enter the date before which you want to remove the transactions of completed referrals. The Older Than date defaults to the current system date. You can override this value.
3. Click OK.
4. A message displays asking you to confirm the deletion. Click Yes.

To delete expired provider records

To determine whether a client should be deleted, iMIS compares the date you enter in the Older Than field on the Delete Old Clients Referral Dialog window to the Ref_Client.DATE_CREATED value for each client record.

1. From Delete expired items, click Delete Expired Providers.
2. Enter the date before which you want to remove providers. The Older Than date defaults to the current system date. You can override this value.

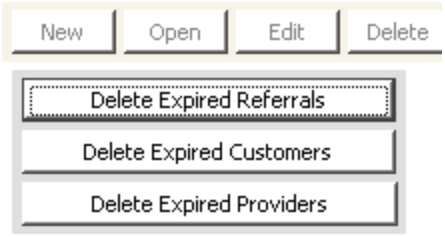
3. Click OK.

To delete expired client records

To determine whether a client should be deleted, iMIS compares the date you enter in the Older Than field on the Delete Old Clients Referral Dialog window to the Ref_Client.DATE_CREATED value for each client record.

1. From Delete expired items, click Delete Expired Customers.
2. Enter the date before which you want to remove client records. The Older Than date defaults to the current system date. You can override this value.

Delete expired items window



Admin Console: Home > Referrals > Delete expired items
Desktop: Referrals > Delete expired

Rebuild search indexes

The section discusses building and maintaining your referral list, which is the list of current referral candidates from your customer database.

To build the referral list, the system creates and later updates, a list of referral candidates, which consists of the active REFERRAL subscription records that matched the Provider List User Search Filter (or the iMIS default).

To build a referral List

1. Add the REFERRAL subscription to all provider candidates and invoice them. If you use the default search filter, iMIS verifies that the Paid_Thru date is greater than the current

date. In this case, the customer must pay the REFERRAL product before they will process when you rebuild search indexes.

2. Make sure all provider candidates have records in all Customer tables referenced in the Optional Search Fields area of the Set up module window.
3. From Referrals, select Rebuild search indexes. The system prompts you to confirm your choice before running the procedure, which can be lengthy.
4. Click Yes. As iMIS builds the list, it pulls the data maintained in the search fields you specified.

Configure referrals options

Setting up Referrals to enter and manage professional referrals involves the following multipart process:

1. On the Billing Set up products window (from Billing, select Set up module> Products), you must set up a subscription-billing item (of type REFERRAL) in order to enroll your providers in the referral program.
2. On the Customers Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation), you must create your referral tables (REFERRAL_AREA, and up to four additional tables) and enter your organization's preferences.
3. Build a list of providers.
4. Set the options available on the Referral Advanced Setup window.
5. In Customers, establish any additional demographics you need for searching for referrals.
6. (optional) On the AR/Cash Set up product codes window, create a product code (such as SALES-REFERRAL_FEE) for your referral service sales item. This code must begin with SALES and must match the code named on the Referrals Set up module window (from Referrals, select Set up module).

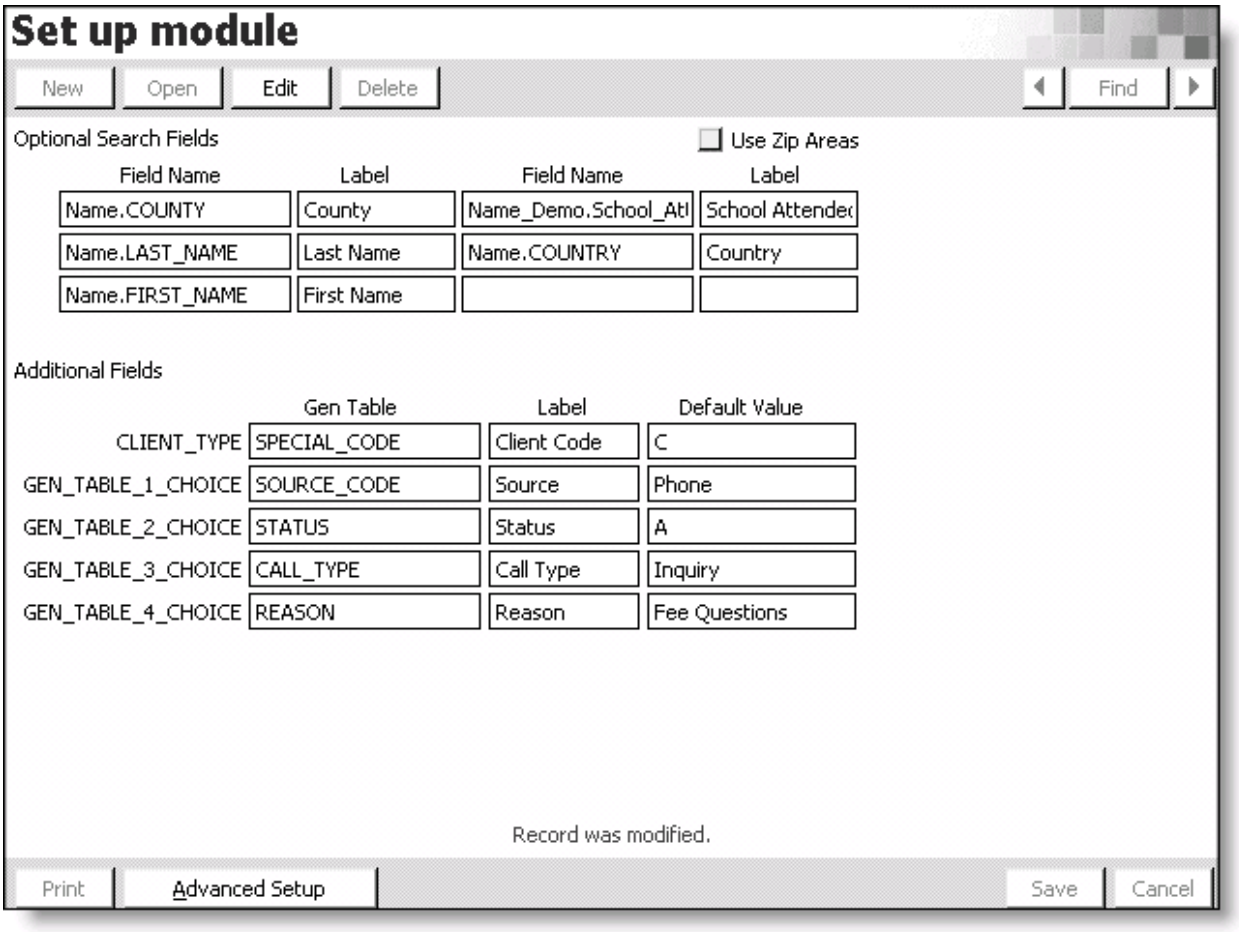
To set basic referral options

1. From Configure referrals options, click Edit.
2. Specify your desired optional search fields. Once you enter the desired fields and labels, they will display at the bottom half of the Manage referrals window.
3. (optional) In the Additional Fields area of the window, define up to four fields to categorize your incoming referrals, plus one field to categorize the client. The general lookup tables you specify provide lookup, validation, and expansion for the fields.

   The data iMIS gathers for referrals is recorded in the following fields in the Referral and Ref_Client tables:

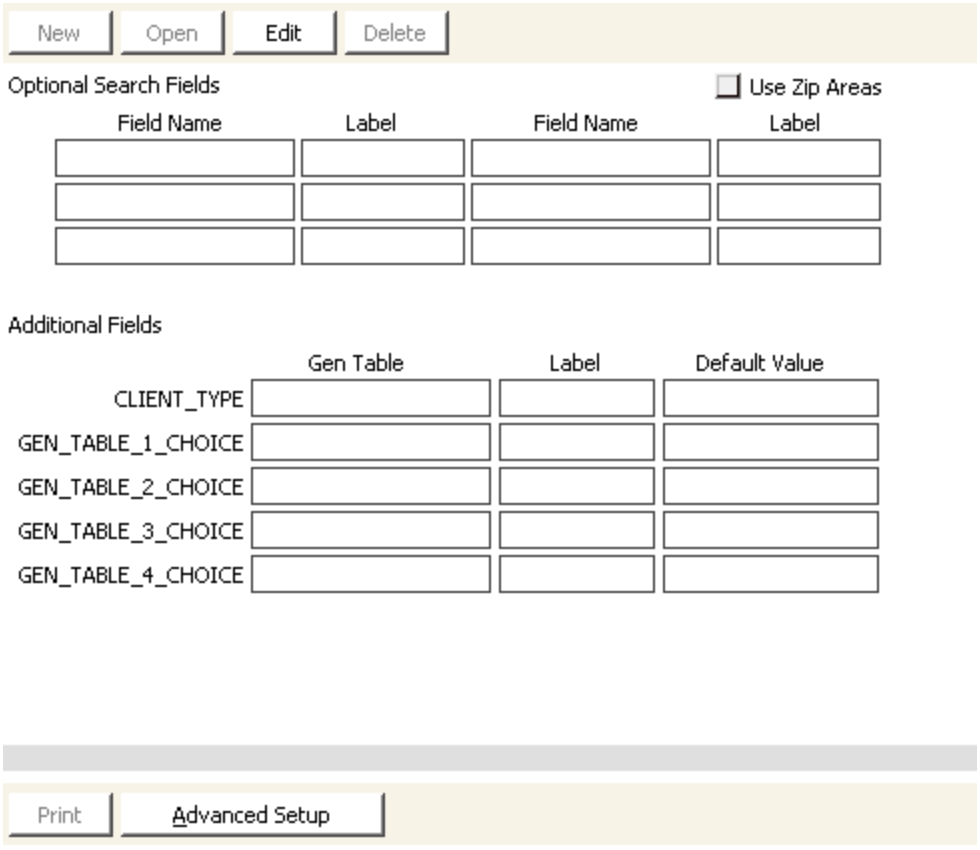
- Ref_Client.CLIENT_TYPE
- Referral.GEN_TABLE_1_CHOICE
- Referral.GEN_TABLE_2_CHOICE
- Referral.GEN_TABLE_3_CHOICE
- Referral.GEN_TABLE_4_CHOICE

After you enter the fields, they display in the top half of the Manage referrals window. The following example categorizes calls by Client Code, Source, Status, Call Type, and Reason.



Example Set up module window displaying basic setup settings

Configure referrals options window



Admin Console: Home > Referrals > Configure referrals options
Desktop: Referrals > Set up module

Optional Search Fields

Use this area to specify your optional search fields:

Use Zip Areas – Select this option if you are maintaining zip code areas (zones) and want iMIS to locate providers based on the client's zip code.

If you disable this option, you can use the first field for an additional (sixth) search field, such as Name.COUNTY.

Note: Refer to Enabling Zip Code Search for instructions on setting up the Use Zip Areas feature.

Field Name – You can specify up to five character fields from the Name table and custom (except multi-instance) tables to be available for searching. You can also specify six fields if you deselect the Use Zip Areas option. In most cases, these fields will point to either a user-defined demographic field or a list string field.

Note: When using these fields to search, iMIS will process the query on a CONTAINS basis - meaning it will return all values that contain the search term. For example, if you search for "600", the values 600, 1600, 2600, 6001, 6006 would all be returned. The search will also insert ANDs between each search field you use.

Note: Each provider you expect to use must have a record in all custom Tables referenced in Field Name. Otherwise, they will not be added when you run the Rebuild Search Indexes utility.

iMIS validates the Field Name entry to ensure that it refers to appropriate Name fields; it also autoformats the field's capitalization. iMIS rejects a field name in two cases: 1) If the field is not in the Name table or any custom tables, or 2) if the field is not a character field (for example, PAID_THRU).

The fields you specify will be used to create search indexes for providers and are populated by the Rebuild search indexes utility. The Referral module will reference these indexes when building lists of available providers for each client. These fields are stored in Ref_Provider.INDEX. The first thru sixth fields and have a length of 100 characters.

Each Field Name field has a limit of 30 characters.

Note: Any field over 255 characters long is considered a text field, and iMIS will not accept that entry.

Note: The first search field (top left) is available only when the Use Zip Areas is not selected.

Label – Specifies the prompt (label) that you want to display in the Manage referrals window to represent the search field. Label 1 refers to Field Name 1 (30-character limit).

Additional Fields

Use this area to specify your additional fields:

- Gen Table – Specifies up to five general lookup/validation tables. For each specified table, a corresponding field displays on the Manage referrals window and the values are saved in the Referral table.

  Note: You must have already created your general lookup/validation tables to reference them in this area. If your table name does not match an existing table, iMIS prompts you to correct the entry.

- Label – Specifies a label you want to appear on the Manage referrals window to represent the table.

- Default Value – The value you enter in this field is the default general lookup/validation table value to be used for a new transaction. You can select this value by using the lookup feature (Ctrl+L). The values will display in the Manage referrals window.

  Note: The Gen Table fields can be edited throughout the life of the referral record to maintain an ongoing status. For example, you can use one of these to track the referral status based on the information received from the provider.

  Advanced Setup button

  Opens the Referral Advanced Setup window where you can specify your advanced setup options.

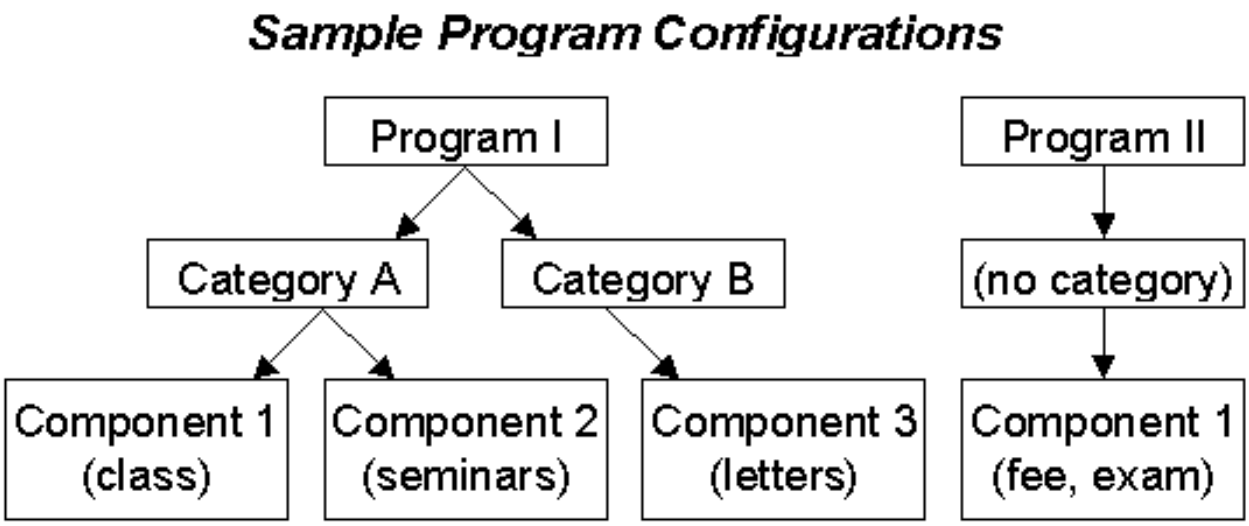
Certification

The Certification module helps your organization grant credits to customers for activities or achievements. For many organizations, these credits are in the form of CEUs (continuing education units) that customers are required to complete in order to maintain a certain status or designation in their profession or industry. The Certification module gives you great flexibility in the design of these requirements, allowing you to adapt your system to the unique conditions and qualifying factors of your organization's certification program.

How Certification Works

The Certification module allows you to create several certification programs, each with a different set of completion criteria. For example, you can set up a simple program requiring customers to attend three of five available seminars over a specified time period, with each seminar defined as a certification component. Attendance at the seminar would be considered credit. You could also create a very complex program with 30 or 40 components and a three-year period for program completion.

An important feature of the Certification module is the ability it gives you to assign components to categories. For example, you can assign certain courses to Category A, others to Category B, and require students in a program to complete 20 hours of courses from Category A and 60 hours of courses from Category B.



Sample Program Configurations

Several standard reports help complete the certification process by informing customers of their progress or by notifying a regulatory board about customers who have successfully completed program requirements.

Register a student for a program

When a student has expressed interest in earning the certification offered by your organization, the first step is to enroll the student in the certification program. Enroll students in

a program using the Register a student by program window.

Note: The student must have a customer record in the iMIS database to register for a program or a component.

To enroll a student in a program

To enroll a student in a program or a component, the student must have a customer record in the iMIS database.

1. From Register a student by program or Register a student by component window, click New.
2. Enter the customer ID of the student registering for the program in the Registrant field.
3. Press Tab.
4. Enter the program code in the Program field, or click the lookup icon to select a program. The Description, Status, Enrolled, Deadline, and Good Thru fields automatically fill with the program data.
5. Click Save.

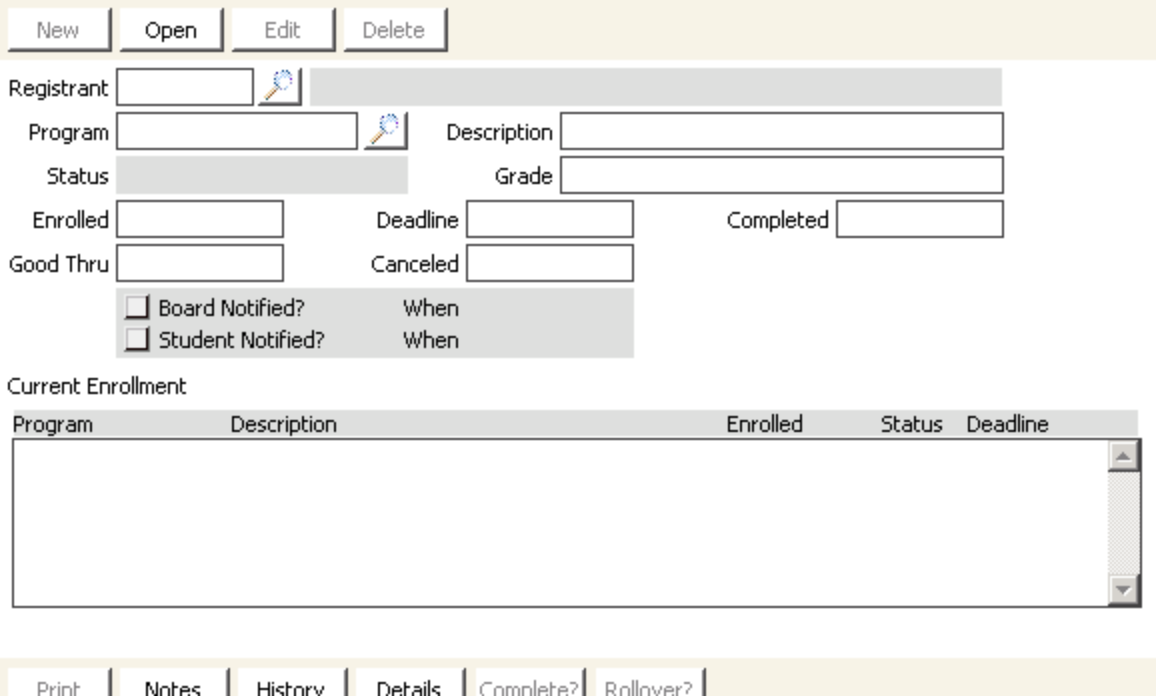
To add registration notes

1. From Register a student by program window, click Open and enter a customer ID in the Registrant field.
2. Click Save. The registration record is shown.
3. Select the program registration.
4. Click Edit.
5. Click Notes to open the Registration Description window.
6. Update the window as needed.
7. Click Save to return to the Register a student by program window.
8. Click Save.

To view a registrant's certification activity

1. From Register a student by program window, click New.
2. Enter a Registrant, or click the lookup icon to select an ID.
3. Enter a program, or click the lookup icon to select a program.
4. Click Save.
5. Click History. The Activity window opens, allowing you to view the student's registration record.
6. Double-click an activity to open the Activity Detail window.

Register a student by program window



Admin Console: Home > Certification > Register a student by program
Desktop: Certification > Register a student > By program

Registrant

(required) Specifies the customer ID of the individual registering for the program. You can click the lookup icon to select a value.

Program

(required) Specifies the program code. You can click the lookup icon to select a value.

Description

The system automatically populates the Description field with the program description entered on the Set up programs window.

Status

(read only) Displays the student's status in the selected program. Statuses:

- E - Enrolled
- C - Completed
- X - Canceled

Grade

(optional) Specifies the student's grade for the program.

Enrolled

This is the date the student began the certification program or the maintenance cycle. It defaults to the current system date or the date determined by the Optional Initial Date Calculation field on the Program Dates window. You can override this date.

Deadline

This is the date the student must complete the initial certification or maintenance requirements by the deadline date. This may or may not be required, depending upon the program requirements. It defaults to blank or to the date determined by the values set on the Set up programs window.

Completed

This is the date the student completed the program. The completed date is the date you run the completion test.

Good Thru

This is the date the program registration expires for the initial portion of a program. In the case of the program's maintenance portion, the Good Thru value determines the date that the certification expires if the maintenance requirements are not met. This may or may not be required, depending upon the program. The information in this field defaults to blank or to the date determined by the values set on the Set up programs window.

Canceled

This is the date that the program registration was canceled if the option Delete Program Registration at Cancellation is not selected. This option is shown on the Certification System Options window.

Board Notified? and When

The system automatically enables this field when you run the Board Notification Report.

Student Notified? and When

The system automatically enables this field when you run the Student Notification Letter Report.

Current Enrollment

Lists all program registrations and enrollment statuses for the selected ID. Select a specific program line to display the details on the Register a student by program window.

Notes

Opens the Registration Description window to enter detailed information about the registration, for example, special needs for the registrant or tutor information.

History

Lets you open the Activity window where the registrant's certification activity information is shown. You can edit activity information on the Activity window if you enabled the Allow user Edit option on the Set up activity types window (not recommended).

Details

Opens the Program Requirements window to view detailed information about the program category and component requirements. You can view high-level category or component information, or expand this information to see more detail. You can also register the individual for components or categories through this window.

Complete

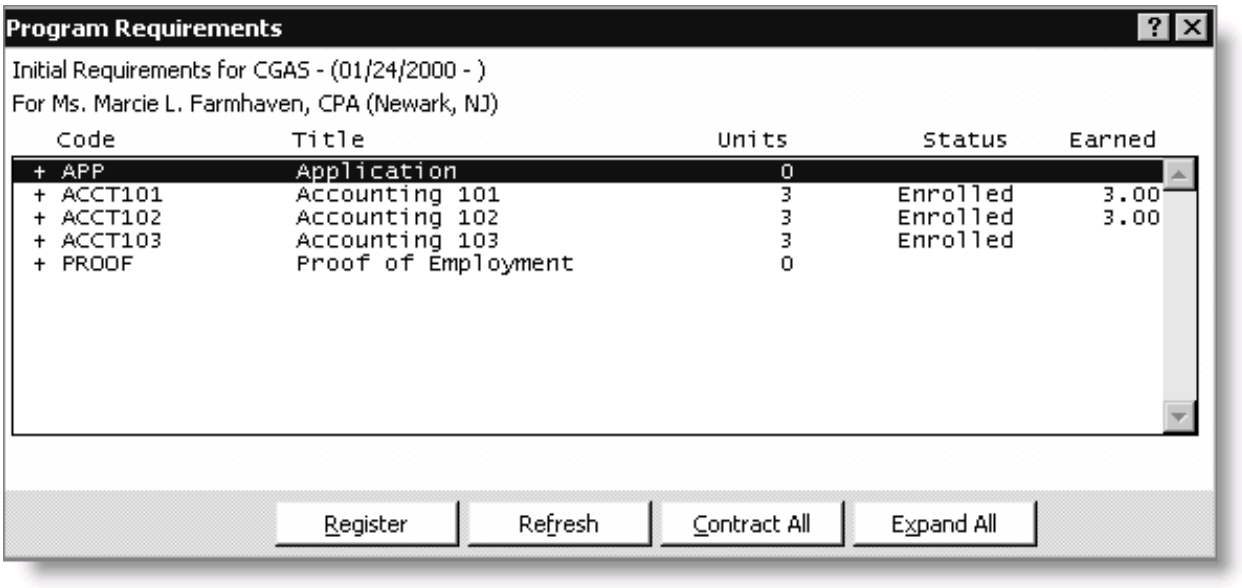
Lets you perform a completion test on a single student. iMIS reviews the program's status, determining whether the student has met all the requirements of the program or the maintenance cycle. After you click the button, a message is displayed indicating whether the requirements have been met.

If a student has met all program requirements, the program registration is assigned a status of Complete and the Completion date is populated with the current system date. If the program is a maintenance program and you selected the Automatically Enter First and/or a Subsequent Maintenance Portion(s) option, a new program registration record is created for the student's first or next maintenance cycle.

Rollover

Lets you manually rollover a registrant to the maintenance portion of the program if you did not select the Automatically Enter First and/or Subsequent Maintenance Portion(s) maintenance option on the Program Dates window. This creates a new program registration record for the student's first or next maintenance cycle.

Program Requirements window



From Certification, select Register a student> By program, find a registrant, select a program, and click Details

Code

An abbreviation for the category or component required for the selected program

Title

Title of the category or component required for the selected program

Units

The number of units required for completing the category or component

Status

The status of the category or component as it relates to the selected program

Earned

The number of units earned for the category or component

Register

Opens the Register a student by component window to enter or edit registration information for the selected component.

Refresh

Refreshes the information that is shown on the Program Requirements window.

Contract All

Lets you contract the information for each of the categories or components.

Expand All

Expands the information for each of the categories or components.

Register a student by component

Although you can access the Register a student by component window through the Register a student by program window, you also can access the window directly from the Certification menu (from Certification, select Register a student> By component).

To register for a component using Register a student by component

You can register individuals for components with or without registering them for a program.

1. From Register a student by component window, click New.
2. Enter a Registrant, or click the lookup icon to select an ID.
3. Enter a Component, or click the lookup icon to open the Component Find window where you can select a component from the list of components.
4. Press Tab. The Description field automatically fills with the description that was entered on the Set up components window.
5. Press Tab and enter the Location, or click the lookup icon to select a value.
6. Press Tab and enter the Program code, or click the lookup icon to select a value.
7. Click Save.
8. Repeat steps to register the student for all the program components.

To cancel a component registration

1. From Register a student by component window, click Open.
2. Enter the Registrant, or click the lookup icon to select a customer ID.
3. Select the component you want to cancel.
4. Click Delete. A message is displayed asking you to confirm the deletion.
5. Click Yes.

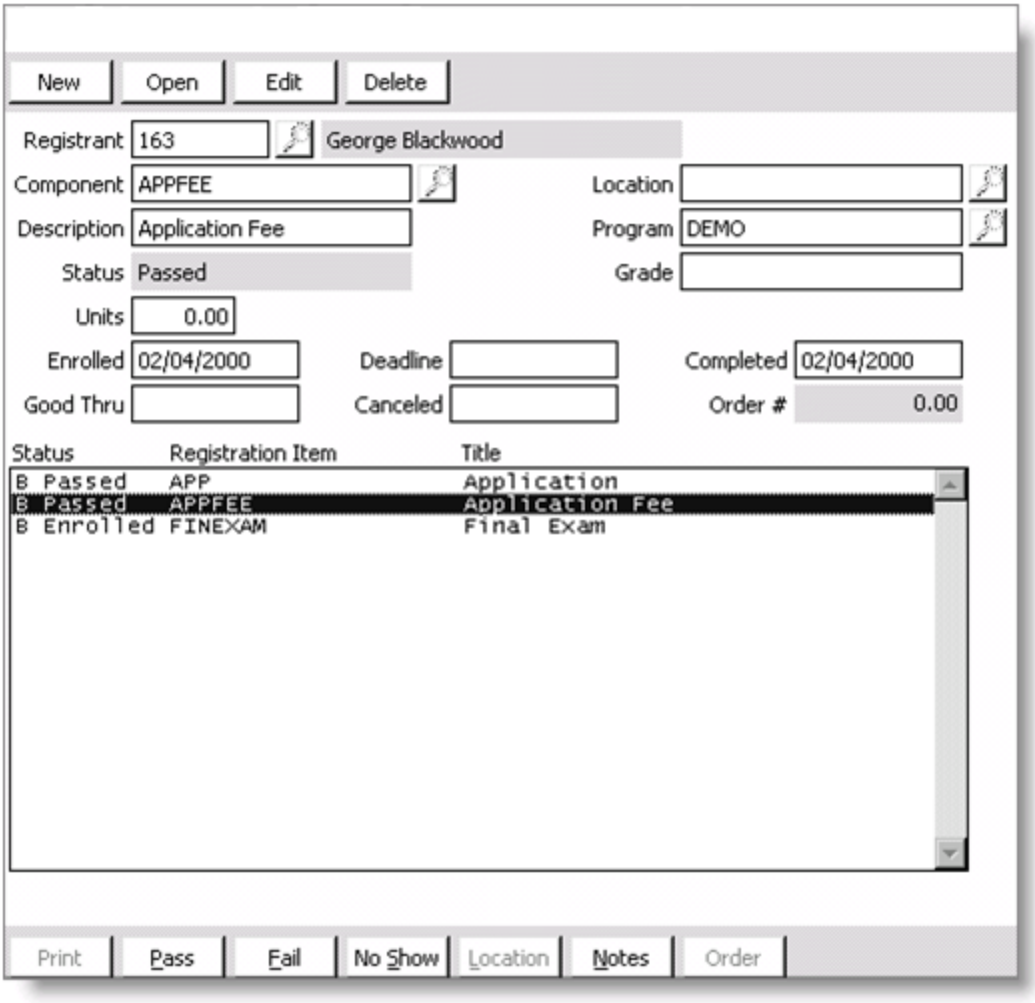
   Depending upon your system settings, iMIS marks the component with an X for canceled or deletes the record. In either case, you must reverse the accounting transaction manually.

   To assign a pass, fail, or no show status to a registration record

1. Enter a component registration on the Register a student by component window.

   Note: Be sure that you did not enable the Skip Enrollment option for this component.
2. Select the line item and click Pass.
3. Complete edits to the component registration. For example, enter a Grade.
4. Click Save to update the record. The status of the line item changes to Passed.

Register a student by component window



Admin Console: Home > Certification > Register a student by component
Desktop: Certification > Register a student > By component, find a registrant

Registrant

Specifies the ID of the student you are registering for the component. To register a student for a component, the student must have a record in the customer database.

Component

Specifies the code of the component for which you are registering the student.

Location

(optional) Use this field to identify the Location code for this occurrence of the component. This value is specified when the component is defined. You can click the lookup icon on the field to select a value.

Description

The system automatically populates this field with the description associated with the component code entered on the Set up components window

Program

(optional) Specifies the program code for the program associated with this component. You can click the lookup icon on the field to select a value.

Note: You must enter a Program Code if you want the component to “tie to” a program.

Registration Type

The Registration Type is shown immediately to the left of the Status on the display window. Registration types include the following:

- B - Specifies that the registration is for a component that is tied to a program
- C - Indicates that the registration is for a component that is not tied to a program

Status

(read only) The Status field displays the student's status for the selected component. Status types include the following:

- E - Enrolled
- P - Passed
- F - Failed
- N - No Show
- X - Canceled

Grade

(optional) Specifies the grade that the student receives for the course (component) after completing it. You enter the grade manually.

Units

The Units field automatically fills with the number of units the student earns for completing the component. You can override this number, if necessary.

Enrolled

Defaults to the system date when a component registration is processed. You can override this if necessary.

Deadline

The Deadline is the date by which the student must complete the component requirements. You enter this manually, if it is required.

Completed

Displays the date when the student completed the component. It is filled with the system date when the component moves to a Passed status.

Good Thru

Displays the date that the component registration expires. You enter this manually, if it is required.

Canceled

Displays the date that the component registration was canceled. This field is not used if you enable the Delete Component Registrations at Cancellation option on the Certification System Options window.

Order#

Displays the certification order number.

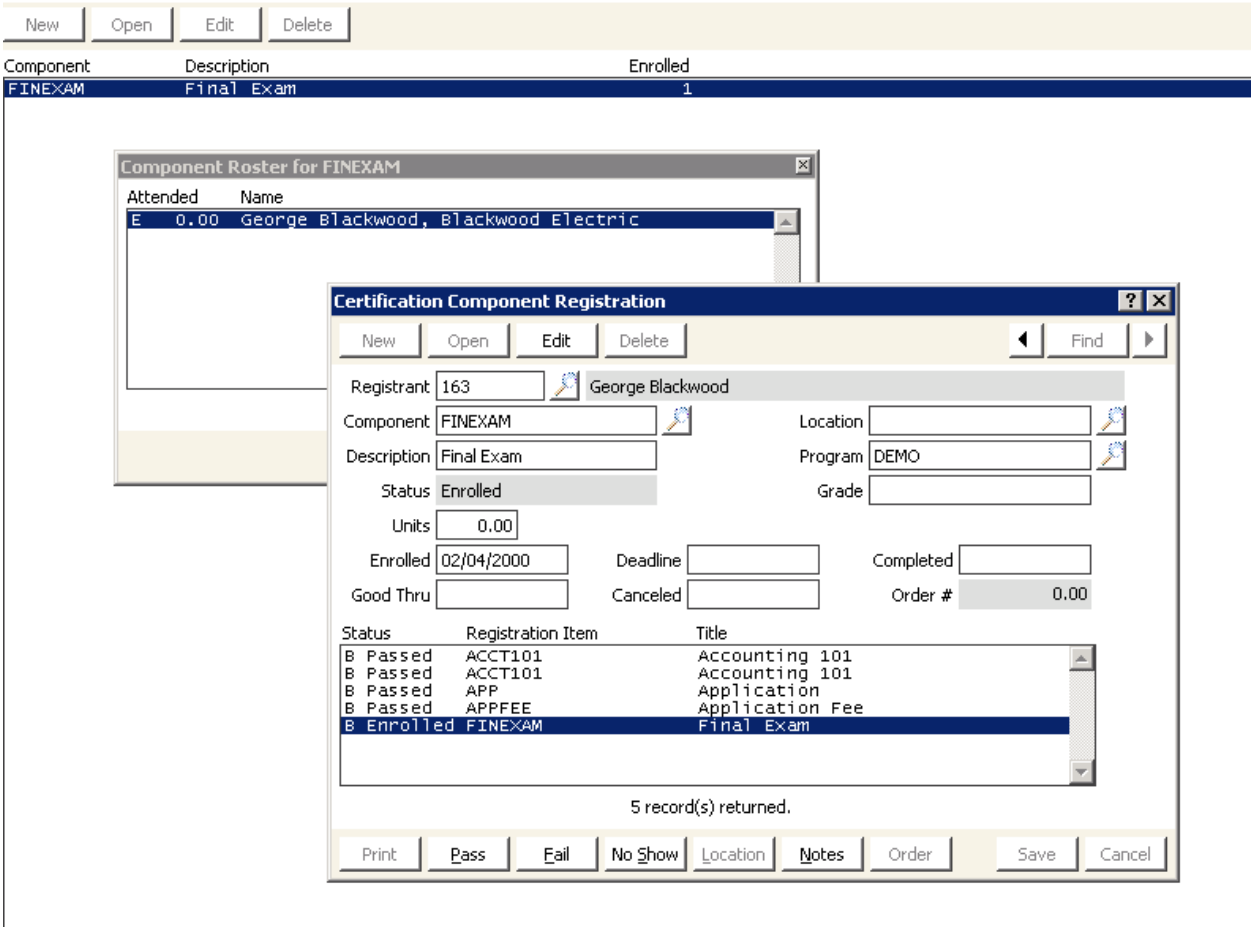
View rosters by component

To view CEU activity records after closing an event

After you close an event, you can view the CEU activity records on the Activity window.

1. From View rosters by component window, click Find and enter a customer ID in the Equals field. The customer record is displayed.
2. Select the Activities-All tab.
3. Double-click the CEU activity to open the Activity Detail window.

View rosters by component window



Admin Console: Home > Certification > View rosters by component

Desktop: Certification > Register a student > View Component List and Roster

Purge registration

iMIS creates component activity records when you purge registrations. You may purge component or program registrations as needed to delete old records or to create activity

records. You can select records three ways:

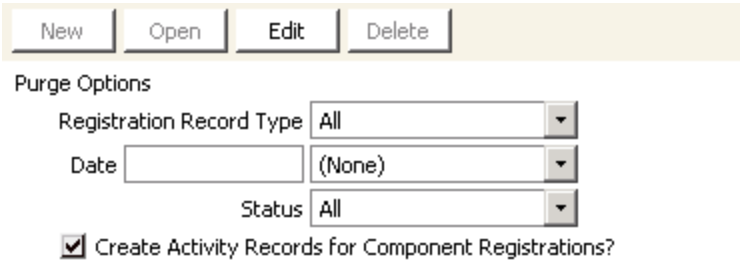
- By type
- By specific dates stored in the certification record
- By status

Select the options from the drop-down list attached to each field.

To purge certification records

1. From Purge registration window, click Edit.
2. Select a Registration Record Type.
3. Enter a Date, if applicable.
4. Select an option from the Status drop-down menu.
5. Select the Create Activity Records for Component Registrations checkbox, if applicable.
6. Click Save. A message is displayed asking you to confirm the purging of the registration records.
7. Click Yes. Another message is displayed informing you of the number of rows that will be purged and asking you confirm the process.
8. Click Yes.

Purge registration window



Admin Console: Home > Certification > Purge registration
Desktop: Certification > Set up tables > Purge registrations

Registration Record Type

Use this drop-down list of options to specify the type of registration record you want to purge:

- All - Specifies that all registration records are purged by the procedure
- Component - Specifies that only component registrations are purged by the procedure
- Program - Specifies that only program registrations are purged by the procedure

Date

(optional) Use the Date field to enter a date stored in the Certification system. The Date field works with the drop-down menu to its right - you must select an option from the drop-down list.

Status

Use this drop-down list to select the status of the records you want to purge:

- All - All records of the type selected
- Completed - Only the completed records for the type selected
- Canceled - Only the canceled records for the type selected
- Failed - Only the records of individuals who failed the component
- No Show - Only the no show records for the type selected

Create Activity Records for Component Registrations

This option allows you to create CERTIFICAT activity records for any component registration that you are purging. For example, if you select the Component type and the All status, you will purge all component registrations and generate activity records for them all. This option overrides the option's setting on the Certification System Options window.

Delete canceled programs

When you cancel a program, a status of X is shown beside the program until you delete it.

Note: If you enable the Delete Program on Cancel option on the Certification System Options window, the program setup is deleted when you cancel the program. This means that you will no longer see it on the Set up programs window.

To cancel a program

1. From Set up programs window, double-click the program you want to cancel.
2. Click Cancel Program.

- Click Cancel Program. A message is displayed asking you to verify that you want to cancel the program. Click Yes to cancel the program. An X is displayed next to the name of the program you closed

To delete a canceled program

1. Go to Certification > Delete canceled programs. A message asks you to confirm the deletion of all canceled programs.
2. Click Yes.

Delete closed programs

When you close a program, a status of C is shown beside the program until you delete it.

Note: If you enable the Delete Program on Close option on the Certification System Options window, the program setup is deleted when you close the program. This means that you will no longer see it on the Set up programs window.

To close a program

1. From Set up programs window, double-click the program you want to close.
2. Click Close Program.

- Click Close Program. A message is displayed asking you to verify that you want to close the program. Click Yes to close the program. A C is displayed next to the name of the

program you closed.

To delete a closed program

1. Go to Certification > Delete closed programs. A message asks you to confirm the deletion of all closed programs.
2. Click Yes.

Set up programs

Programs are created in the Set up programs window. Programs can be very simple with only a few of components or very complex with several components and component categories.

Certification programs can be created in the following windows: Current Certification Programs, Certification Program Types, Set up programs, and Program Items.

Creating a program involves the following four steps:

1. Define your program. See To create a certification program.
2. Define the initial requirements of the program. See To create the initial requirements for a program.
3. Define the maintenance requirements of the program. See To create the maintenance requirements for a program.
4. Define the grace period requirements of the program. See To create grace period requirements for a program.

To create a certification program

1. From Set up programs window, click New. The Certification Program Type window opens.
2. Select a program type.
3. Click OK. The Set up programs - program definition window opens.
4. Enter the code for the program in the Program ID field.

5. Enter the Title of the program.
6. (optional) Enter the date that the program was Established.
7. (optional) Enter the Industry Code for the program.
8. Click OK.

Note: The order in which you add components and categories to a Save is the order that they are displayed on the Set up programs window. This cannot be changed.

To create the initial requirements for a program

The next step in creating a program is to define the initial requirements.

1. From Set up programs window, double-click a program to open the Set up programs - program definition window.
2. Select the Initial option in the Requirements for section.
3. Click Insert on the window. The Program Items window opens. A list of categories is displayed in the window.

Note: When you first open the window, the default setting is to display a list of categories.

4. Select a category from the list, if applicable. To insert multiple items, hold down the Ctrl key as you select each item.
5. Click OK to return to the Set up programs window.
6. Click Insert on the window to re-open the Program Items window. This time, enable the Component option. A list of components is shown.
7. Select a component from the list. To insert multiple items, hold down the Ctrl key as you select each item.
8. Select the component(s) required for the initial phase of the program.
9. Click OK to return to the Set up programs window.

To create the maintenance requirements for a program

1. Select Maintenance in the Requirements for area of the Set up programs window.

2. Click Insert. The Program Items window opens. A list of categories displays in the window.
3. Select a category from the list if applicable. To insert multiple items, hold down the Ctrl key as you select each item.
4. Click OK to return to the Set up programs window.
5. Click Insert on the window to open the Program Items window again. This time, enable the Component option. A list of components is shown.
6. Select a component from the list. To insert multiple items, hold down the Ctrl key as you select each item.
7. Click OK to return to the Set up programs window.

To create grace period requirements for a program

1. Select the Grace Period option in the Requirements for area of the Set up programs window.
2. Click Insert. The Program Items window opens. A list of categories displays in the window.
3. Select a category from the list if applicable. To insert multiple items, hold down the Ctrl key as you select each item.
4. Click OK to return to the Set up programs window.
5. Click Insert on the window to open the Program Items window again. This time, enable the Component option. A list of components is shown.
6. Select a component from the list. To insert multiple items, hold down the Ctrl key as you select each item.
7. Click OK to return to the Set up programs window.

To edit a program requirement

There may be times when you will need to edit program requirements, for example, if the organization changes existing requirements or adds new ones.

1. From Set up programs window, double-click a program to open the Set up programs program detail window.
2. Select a category or component from the list of program items and click Edit. The Program Details window opens.
3. Enter the new units and click OK.

To delete a program requirement

You also can remove a program item on the Set up programs window.

1. From Set up programs window, double-click a program to open the Set up programs - Program definition window.
2. Select a category or component from the list of program items and click Delete.

- If a message is displayed informing you that there are registration records tied to the Program/Component combination, and that you must cancel the registration records. Click Yes to cancel the registrations.

A message is displayed asking you confirm the deletion.

3. Click Yes to delete the component.

To set program dates

An important part of the certification program setup is establishing time frame requirements that may apply to the initial, maintenance, or grace period portions of a certification program. Set the program-specific dates in the Program Dates window.

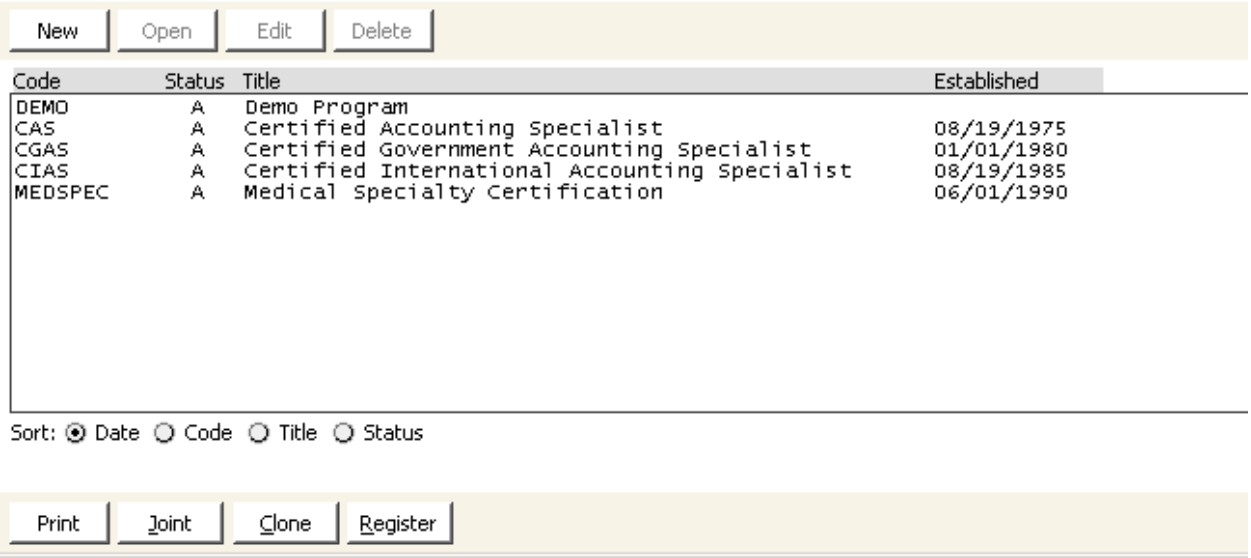
1. From Set up programs window, double-click a program to open the Set up programs window.
2. Click Edit.
3. Click Dates to open the Program Dates window.

4. Select the Completion From Entry into Program option.
5. Enter the number of years required to complete the program in the Years field.
6. Select the Automatically Enter First and/or Subsequent Maintenance Portions option.
7. Select the Completion From Entry into Rotating Portion option.
8. Enter the number of years of the maintenance period for the selected program in the Rotating/Maintenance Time Period Years field.
9. (optional) Select the Enable Grace Period for Maintenance Periods option.
10. Enter the number of months for the Grace Period.
11. Click Save on the Program Dates window.
12. Click Save on the Set up programs window.

Set up programs window - Program list

The Set up programs window serves two purposes:

- Provides a summary of all defined programs.
- Transfers you to a second Set up programs window when you select the program and click Edit, when you double-click the selected program, or when you click New to add a new program.



Admin Console: Home > Certification > Set up programs
Desktop: Certification > Set up programs

Sort Options

The Set up programs window summarizes the information for each program currently defined in the system. This includes the program Code, Status, Title, and Date Established. If you decide to retain definition data on closed or canceled programs, this list can be quite long. The following are sort options to change the order of the list to make viewing it easier:

- Date - (Default) Lists the programs chronologically by start date
- Code - Lists the programs alphabetically by program code. If you assign similar codes to similar programs (for example, PROG94 and PROG95), they are grouped together.
- Title - Lists the programs alphabetically by program title
- Status - Lists the programs by the status of the program. The status types are:
- A - Available
- C - Closed
- X - Canceled

Joint

Opens the Joint Programs window to join two certification programs.

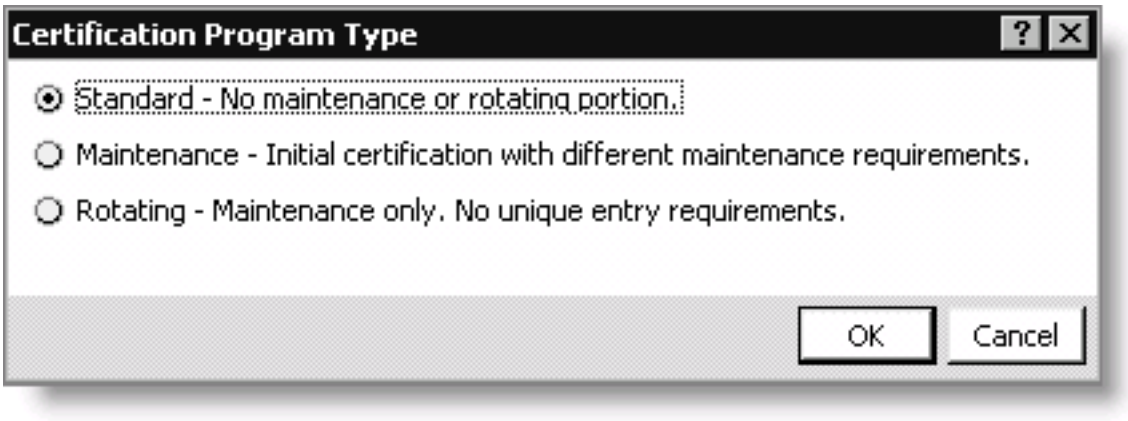
Clone

Copies the program currently selected. This feature requires that you enter a new title. Use this option to generate a new program based on the contents and requirements of the program you have selected. Modify the information as appropriate for your new program.

Register

Opens the Register a student by program window for the program currently selected (selected) on the list. This is a useful option if you just edited a program definition and you want to start entering registrations.

Certification Program Type window



Admin Console: Home > Certification > Set up programs, and click New
Desktop: Certification > Set up programs, and click New

Before you create a new program, define the program type. The Certification module supports three types of programs:

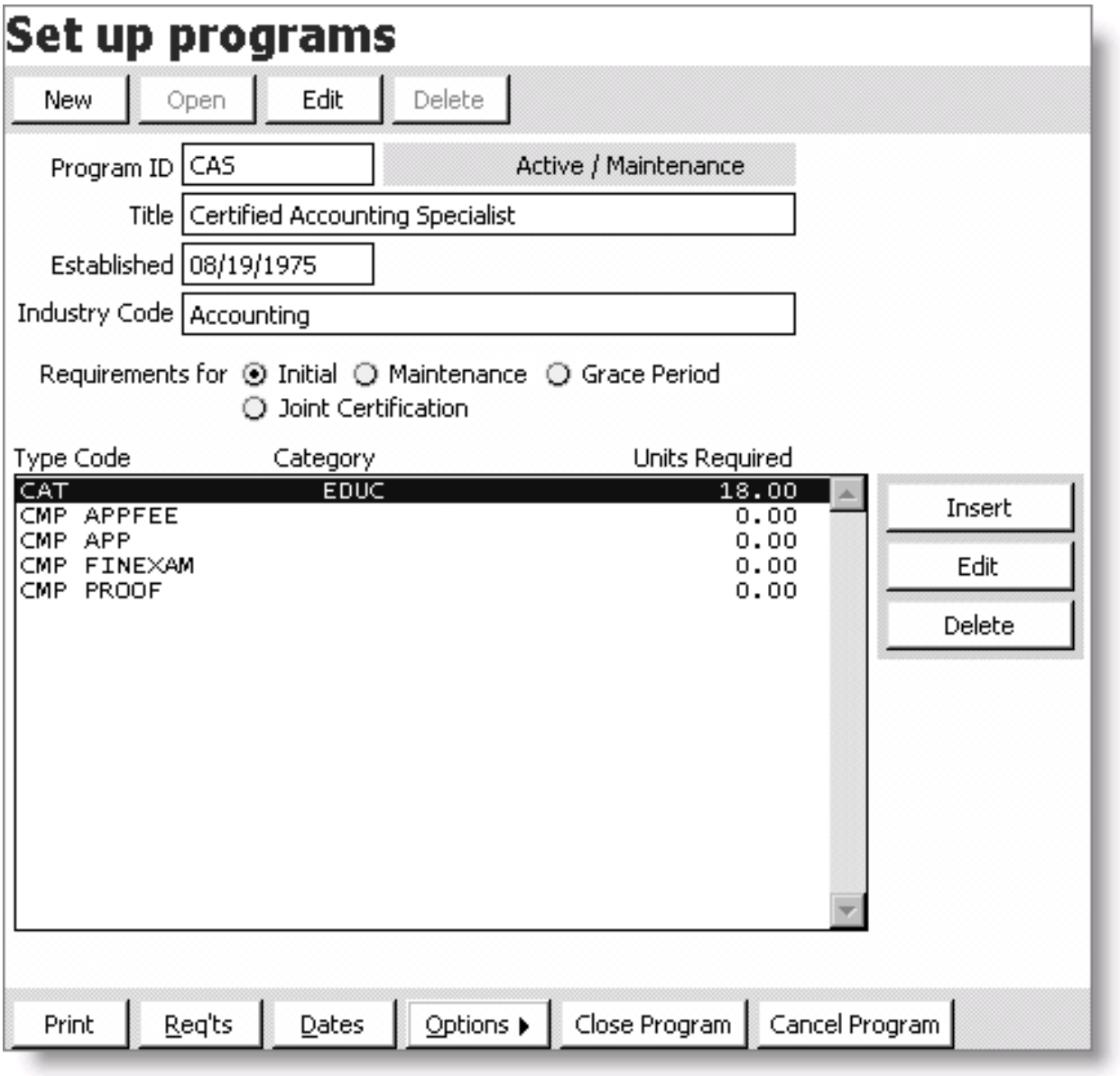
- Standard - A standard program has no maintenance or rotating period; the student is required to complete only an initial set of requirements to become certified.
- Maintenance - A maintenance program has an initial set of requirements for certification and a separate set of requirements to maintain the certification. The maintenance portion of the program begins only when the student completes all the initial program requirements. This can be automatic if the appropriate option is enabled (see To create the maintenance requirements for a program). To manually enroll the student in the maintenance program, click Rollover on the Register a student by program window when the student has completed the initial requirements.
- Rotating - A rotating program does not have a set of initial requirements, but requires a student to complete a set of requirements repeatedly over a specific period to be certified.

Note: You must select one of these options before you go to the Set up programs window and define the program. After you have identified the program type and entered program information on the Set up programs window, you cannot go back and edit the program type.

Set up programs window - Program definition

The top half of the window records the primary information about the program. The bottom half defines the category and component requirements that make up the program and includes buttons allowing access to secondary detail windows.

Set up programs window



Admin Console: Home > Certification > Set up programs, double-click a program

Desktop: Certification > Set up programs, double-click a program

Program ID

Specifies the short name of the program.

Title

Specifies the longer description of the program.

Established

(optional) Specifies the date the program was established.

Industry Code

(optional) Specifies the Standard Industry Code (SIC) for the program.

Requirements for:

- Initial - Enable to display information about the initial program certification requirements.
- Maintenance - Enable to display information about the program's maintenance requirements.

  Note: You can display the maintenance information only if you initially defined this program as a maintenance program.
- Grace Period - Enable to display information about the program's grace period.

  Note: Enable the Grace Period option only if you enabled the grace period option on the Certification System Options window.
- Joint Certification - Enable to display information about joint certification between this program and another program. This option works only if you defined this program as a joint certification program.

Component and Category List Types

Lists all components and categories for the selected program.

Req'ts

Opens the Program Requirements window.

Dates

Opens the Program Dates window. See Setting Program Dates for more.

Options

Opens an options menu for further program definition. See Setting Additional Program Options for more.

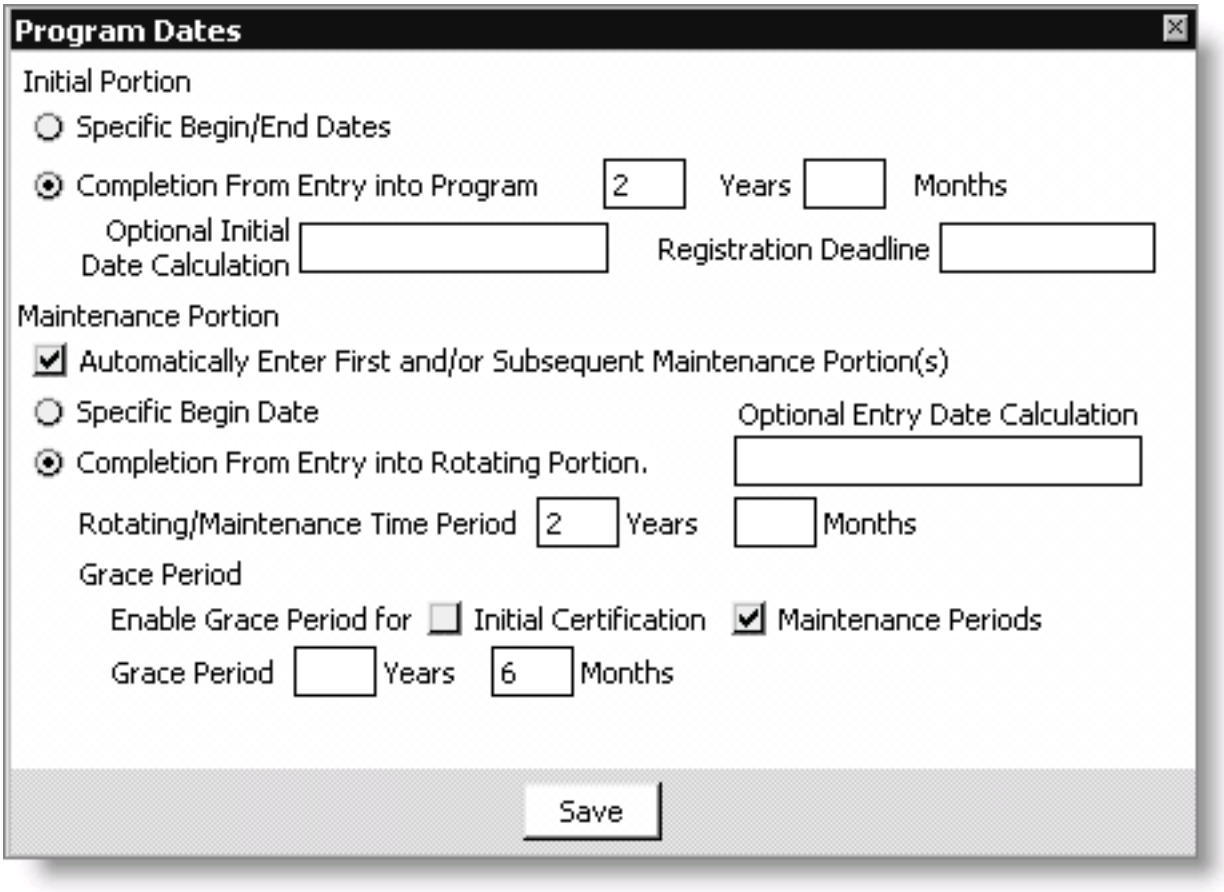
Close Program

Closes the program.

Cancel Program

Cancels the program.

Program Dates window



From Certification, select Set up programs, double-click a program, and click Dates

Initial Portion

The options within this area of the window relate only to the initial portion of the program.

- Specific Begin/End Dates - This option allows you to specify program begin and end dates. For example, if you have a program that will be available for only one calendar year, select this option and set the begin date to 01/01/2000 and the end date to 12/31/2000.
- Completion From Entry into Program - Select this option if you have a certification program with a defined deadline for completing the requirements. For example, if a student must complete a set of courses and exams within a two-year period.

  Optional Initial Date Calculation
- Enter an optional calculation to determine the enrollment date. For example, if all customers are enrolled automatically when they join the organization, enter Name.JOIN_DATE into the Optional Initial Date Calculation field.

  Registration Deadline

  This is an information-only field for storing the deadline date for enrollment in the program.

  Maintenance Portion

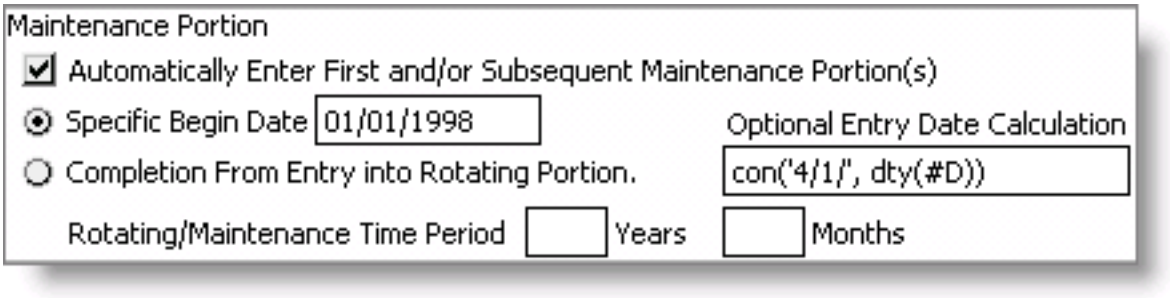
  The options within this area of the window relate only to the maintenance portion of the program.

  Automatically Enter First and/or Subsequent Maintenance Portion(s) - If you enable this option, program maintenance registration records are created automatically when the program completion test is performed.

  Note: If the program has a maintenance portion, enroll the student for the maintenance portion when the student completes the initial requirements.

  When the completion test is run from the Generate reports window or the individual's Set up programs window, and it is determined that the student has completed the requirements for the initial or current maintenance cycle, a new registration record is created for the first maintenance cycle or for the subsequent maintenance cycle.

- Specific Begin Date - Use this option to set a specific begin date for a maintenance cycle. For example, if the program maintenance cycle runs from January 1 to December 31, set the begin date to January 1 of the following year regardless of when the initial portion of the program was completed.



- Completion from Entry into Rotating Portion - Select this option if your program is a rotating or maintenance type and the student is required to complete the same set of program requirements over a defined period of time to maintain certification. For example, enable this option if students are required to pay a fee and to complete 20 hours of continuing education hours every two years. In this case, set the Rotating/Maintenance Time Period to two years.

  Optional Entry Date Calculation

  Use this option to calculate the begin date of the current and subsequent maintenance cycles.

  For example, use the following Omnis calculation example to set all entry dates in the maintenance cycle to April 1 of the current year:

  con('4/1/', dty(#D))

  Enable Grace Period for

  Grace periods carry their own unique sets of requirements, such as fees or additional forms. The ability to use the Grace Period feature is activated on the Certification System Options window.

  When the completion test is run after the deadline, and the appropriate portion is passed and the requirements are not met, iMIS extends the deadline date based upon the time

determined in grace period dates. Also, any additional components that are specific to the grace period are added to the program.

- Initial Certification - This checkbox grants students an extension of time to complete the initial certification portion of a program.
- Maintenance Periods - This checkbox grants students an extension of time to complete the maintenance portion of a program.

Grace Period

- Years - Specifies the number of years for the grace period.
- Months - Specifies the number of months for the grace period.

Set up components

To create a component

1. From Set up components window, click New.
2. Enter the component Code.
3. Select a category from the Category drop-down menu, if applicable.
4. Enter the Begin Date and End Date for this component, if applicable.
5. Enter the number of Units.
6. Enable the Tie to Program option if this component is tied to a specific program.
7. (optional) Enable the Skip Enrollment option.
8. Enter a Title.
9. (optional) Disable the Taxable option.
10. Click Save.

To attach subcomponents to a component

Components can be comprised of smaller groupings called subcomponents. For example, a course may have requirements for completion, such as a tutorial, study guide,

or a proficiency test. You must complete all subcomponents before you can complete the component.

1. From Set up components window, select a component from the list of Current Components.
2. Click Options and select Subcomponents from the list. The Subcomponent List window opens.
3. Click Insert. The Child Components window opens and a list of available subcomponents is shown.
4. Select the appropriate subcomponent(s) to attach the subcomponent to the selected component.
5. Click OK to return to the Subcomponent List window. The current subcomponents for the selected component display on the window.
6. Click Save to return to the Set up components window.

To make a subcomponent required

1. From Set up components window, select a component from the list of Current Components.
2. Click Options and select Subcomponents from the list. The Subcomponent List window opens.
3. Double-click the appropriate subcomponent. The subcomponent displays in the Subcomponent List window with a Y in the Required column.
4. To remove the Y and make the subcomponent not required, double-click the subcomponent again.
5. Click Save.

To enter component address information

1. From Set up components window, select a component from the list of Current Components.

2. Click Edit.
3. Click Options and select Address from the list. The Component Address window opens.
4. Enter the address for the selected component in the address fields.
5. Click Save on the Component Address window.
6. Click Save on the Set up components window.

To define component prerequisites

A component may have specific prerequisites that the student must complete before enrolling in the component. For example, before a student can take Advanced Accounting, the student must have successfully completed Beginning and Intermediate Accounting. Define component prerequisites on the Component Prerequisites window.

The large text field in this window holds information about requirements that a student must meet before being allowed to register for a component. The data you enter in this field is not validated before enrolling a student in a component, so make sure to check the component prerequisites before enrolling the student.

1. From Set up components window, select a component from the list of Current Components.
2. Click Edit.
3. Click Options and select Prerequisites. The Component Prerequisites window opens.
4. Enter the prerequisite information.
5. Click Save on the Component Prerequisites window.
6. Click Save on the Set up components window.

To enter component instructor information

The Component Instructors window contains a text field for recording the name of the person teaching the course and the instructor's credentials or other pertinent information.

1. From Set up components window, select a component from the list of Current Components.
2. Click Edit.
3. Click Options and select Instructors. The Component Instructors window opens.
4. Enter the instructor information.
5. Click Save on the Component Instructors window.
6. Click Save on the Set up components window.

To create multiple locations for a component

With the Certification module, a single component can have multiple locations or occurrences. In addition, you can maintain unique speaker and sponsor/provider information for each occurrence of the component.

For example, if the course (component) MACCT101 is sponsored by vendors at various locations across the country, create one component record for MACCT101 and create multiple location records for each class offering.

The unique location is assigned at the time the component registration is processed. A CERTIFICAT activity record is created upon the first occurrence of a component registration for the Speaker and the Provider assigned to the location.

1. From Set up components window, select a component from the Current Components list.
2. Click Options and select Locations. The Locations (name of component) window opens.
3. Create a location.

- Click New.
- Enter the name of the location of the course in the Instance Name field.
- Enter the date (day, month, and year) the course begins in the Begin Date field.
- Enter the time that the component begins in the Begin Time field. The default is AM.
- Enter the date (day, month, and year) the course ends in the End Date field.

- Enter the time that the component ends in the End Time field.
- Enter the ID of the speaker in the Speaker field, or click the lookup icon to select an ID.
- Enter the ID of the provider in the Provider field, or click the lookup icon to select an ID. The address and telephone fields fill automatically with the individual's address information.
- Click Notes to open the Location Notes window.
- Enter the information to be maintained for the component location.
- On the Locations Notes window, click OK. The Locations Notes window closes.
- On the Locations window, click Save.
- Repeat for all of the locations that you need to add for this component.

4. Close the Locations window.

To view component statistics

View the status of the selected component through the Component Statistics window. The status information includes the number of students enrolled in the component if the component is not marked Skip Enrollment, as well as the number of students with the status of P for passed or F for failed.

1. From Set up components window, select a component from the Current Components list.
2. Click Options and select Statistics from the list of options. The Component Statistics window opens.

Detailed information about individuals who are enrolled in, or who have completed the program is displayed in the window.

- The number in the Currently Enrolled field is the number of students enrolled in the selected component.
- The number in the Total Passed field indicates the number of individuals who have passed this component.

- The number in the Total Failed field indicates the number of individuals who have failed this component.

3. Click OK to close the window.

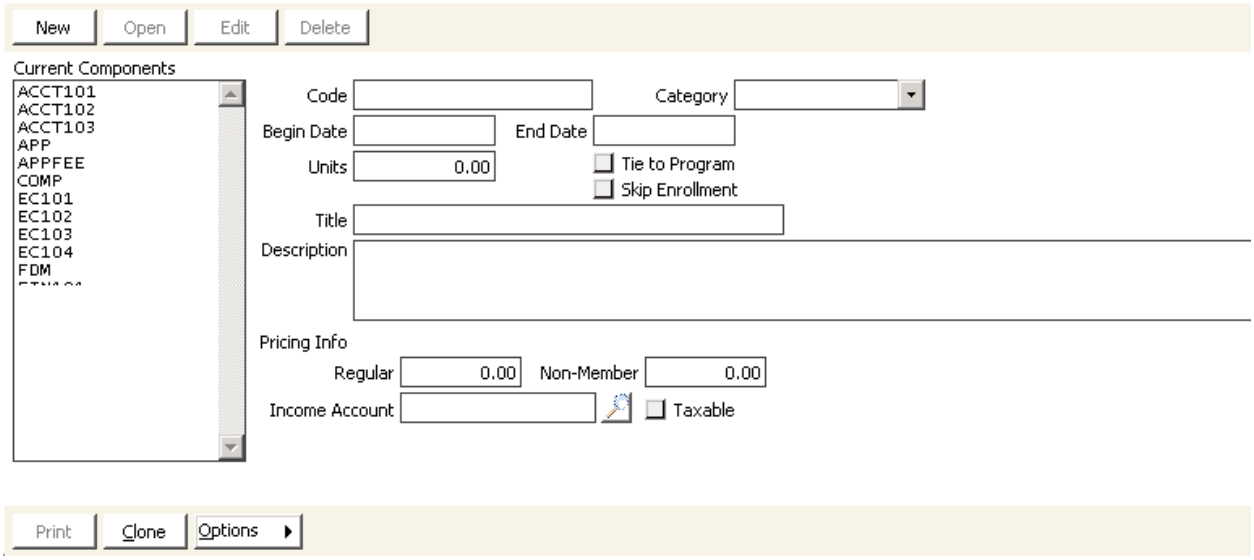
To locate a component using the Component Find window

Enabling the Subset Component Maintenance with Find window option on the Certification System Options window activates a lookup window that is displayed each time you open the Set up components window.

This window allows you to locate a component by reviewing only a subset of the list. You can view components by ID, Title, Category, Location, or Ad hoc. This is helpful if you have many components because this option allows you to view a few components at a time.

1. From Set up components window, select Category under Search Types.
2. Click Open.
3. Enter the component categories code in the search box, for example ACCT.
4. Click OK to view the list. A list of components is shown.

Set up components window



Admin Console: Home > Certification > Set up components
Desktop: Certification > Set up components

Current Components

A list of current components is displayed in this area of the window.

Code

(required) Specifies the primary abbreviation or identification code to represent this component.

Category

(optional) Specifies the component categories assigned to this item. These categories refer to those defined on the Set up component categories window.

Note: If you do not define categories before you create components, you can edit the components later, after you have created categories.

Begin Date, End Date

(optional) Use Begin Date and End Date fields to record the start and stop times for a component. For example, a class beginning on Monday would have Monday's date in the Begin Date field and a class ending on Friday would have Friday's date in the End Date field.

Units

(optional) Specifies the number of units a customer receives for completing the component

Tie to Program

(optional) Select this option to tie a component to a specific program. Because components are reusable, if a component called Class 1 is part of Program A and a part of Program B, the student's completion counts toward both programs.

Tie to Program works as a link between requirements that cannot be transferred, such as fees and specific program definitions. A component marked with Tie to Program is linked

to a specific program when a student registers for the component; however, the component requirement must be satisfied again for each program that requires it.

For example, if you have a General Fee component that is required for all programs and you enabled Tie to Program when you created it, the component is tied to a program every time a student registers for that program. If the student registers for another program requiring the same fee, the student again must pay the fee because it also is linked to the second program.

The following are scenarios you should consider when registering students for components marked Tie to Program:

- If you register a student for a component through a specific program, iMIS automatically ties the component to that program regardless of whether the component is marked Tie to Program. If you do not want it tied to that program, delete the program ID on the Program field on the Register a student by component window.
- If you register a student for a component directly through the Register a student by component window, the only way you can tie it to a program is if you enter the program ID in the Program field.
- If a student completes a component through the Events module, the Program field is not populated. You must edit the component registration and enter the program ID manually to tie the component to a program.

Skip Enrollment

Select this option to specify components that do not require the student's attendance, such as program fees, applications, and resumes.

Title

Specifies a short descriptive title for the component, which displays on the Program Details window and on the Student Transcript report.

Description

(optional) Specifies a lengthy note, description, or comment associated with the component. You can enlarge this scrolling text field by pressing Ctrl+Z.

Pricing Info

In the Pricing Info area, specify pricing information (such as the cost of a component for members and non-members) and a G/L account number. When you register a student for a component with fees, an order is created. The transaction flows down to the iMIS G/L interface.

Regular - Use the Regular field to specify the default unit price (or member price) to apply automatically when a student enrolls in the component. When you enter a component, you can override this default price.

Non-Member - Use the Non-Member field to specify the price for non-members. This price is applied automatically when anyone with non-member status enrolls in the component. This option allows you to avoid most of the manual price overrides.

Income Account

This field identifies the General Ledger income account to credit when sales entries are made for this component. You can click the lookup icon to select an income account.

Note: You do not have to establish G/L accounts if you are not using the iMIS Financial (G/L) interface. If you leave this field blank, iMIS records this entry in the account you designated in the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts).

Taxable

The Taxable checkbox is enabled by default, indicating that the component is subject to sales tax. Select the checkbox to clear it, which reverses the automatic taxability for the component.

Taxable (Canadian)

(Canadian taxation enabled) Canadian Taxation options are not applicable to the Certification module.

Print

Lets you generate and print a Component Description report for the selected component.

Clone

Lets you clone or copy the selected component. The Component Clone window opens where you can enter the name for the new component.

Options

Opens a drop-down list of component-specific options. You can access six sub-windows from the Set up components window. These windows collect and display details about components, such as address, enrollment statistics, location, and instructors.

- Subcomponents - Opens the Subcomponent List window, which displays the sub-components associated with the selected component.
- Address - Opens the Component Address window to enter an address for the specified component. If the component is a class, this may be the ballroom number for a convention hall; if the component is a fee, it may be the address where the fee is sent.
- Prerequisites - Opens the Component Prerequisites window to view the prerequisites associated with the selected component.
- Instructors - Opens the Component Instructors window to enter the names of instructors for a component course.
- Locations - Opens the Locations window to add the location, date, and time for a particular component, as well as speaker and provider information. Speakers and providers must have name records in the iMIS database.
- Statistics - Opens the Component Statistics window to display selected course information, including the number of students who enrolled in the component and the number who have passed or failed the component.

Analytics

About iMIS Analytics

iMIS Analytics brings true business intelligence to your iMIS solution, giving you the power to understand and analyze the performance of your organization in ways that are tedious or impossible with standard reporting tools.

The Problem

The information that you need to identify and respond to performance issues, market trends, and competitive forces is there in your iMIS database, but the sheer volume and variety of data makes it difficult to organize this information. For example, how do you determine whether a sharp revenue drop is just a one-time event in a specific region or is an indication of a larger trend that warrants a massive change in the budget?

iMIS provides many useful reports, and you have probably had many custom reports designed to help you see trends or to investigate performance issues. Unfortunately, it's not practical to continually develop new reports to deal with time-critical issues as they arise, which means that you are often making important decisions based on incomplete information.

Other issues that affect your ability to analyze your organization's performance include the following problems:

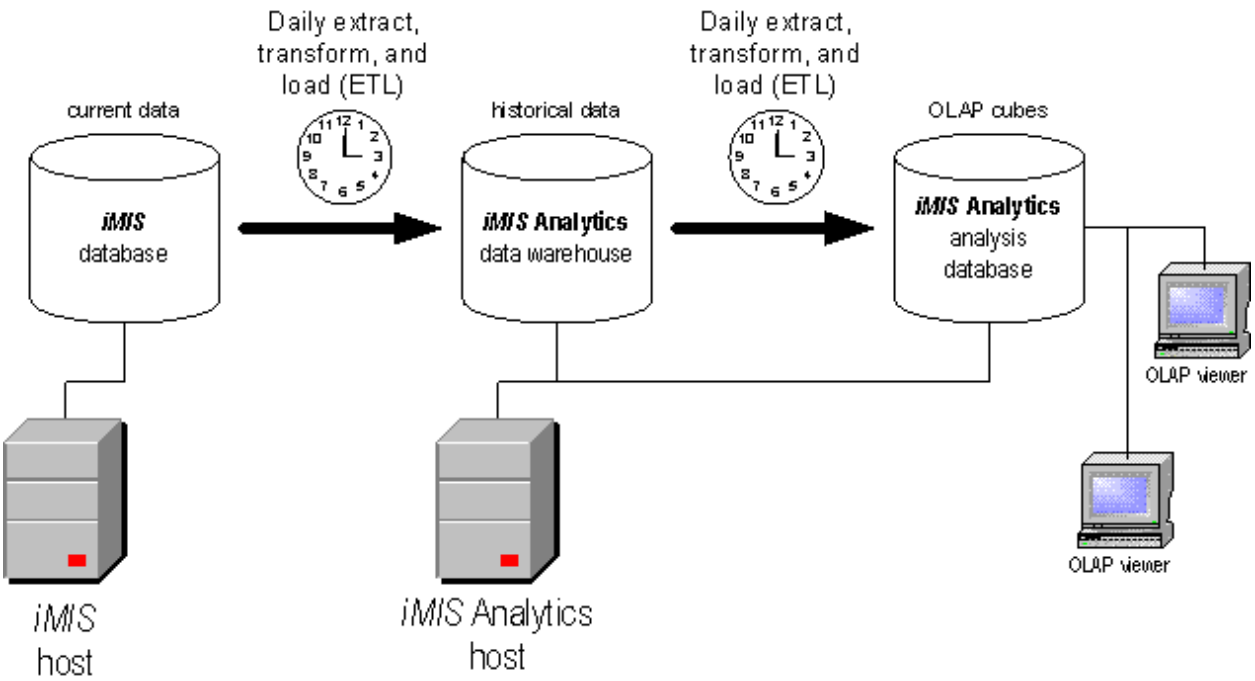
- Frequent reports and queries by your executives and managers can drain the system of resources for your normal business activities.
- Some of the information in your iMIS database is always current data, such as a customer name or address. However, if a customer address changes, for example, reports and queries cannot easily show you the historical addresses.

You might already know that implementing a data warehouse and online analytical processing (OLAP) database can solve these problems, but such an undertaking can be difficult and costly.

The Solution

Analytics is a turn-key business intelligence solution for your iMIS system. Analytics creates a data warehouse and OLAP database that is tailored specifically for your iMIS database. Every night, your data is automatically extracted from the iMIS database and stored in the data warehouse so that you have a complete historical record of all your iMIS data. The OLAP database contains one iMIS cube comprising eight measure groups that are designed to give you the best combination of multi-dimensional views into your iMIS information, and the cube is automatically updated every night with the information from your data warehouse.

You use an OLAP viewer to analyze the information that is stored in the cube, which is a very fast and flexible process that doesn't require knowledge about designing reports or performing SQL queries. This approach eliminates the need to run reports on a daily basis for manual comparison. Instead, you have instant access to key performance indicators, can easily compare multiple information categories, and can easily drill down into any information category. Because you are examining the OLAP database instead of reporting and querying against your iMIS database, your organization's normal business activities are relatively unaffected.



Analytics comes with a predefined Analytics Briefing Book that is designed for the popular OLAP viewer ProClarity Professional. The Briefing Book is filled with many useful views into the iMIS cube, which provides you with a clear picture of your organization's performance in key areas. You can also add your own views to the Briefing Book and share them with other ProClarity Professional users in your organization.

Analytics can be configured to include certain types of custom demographics that you have added to your iMIS solution, making these custom demographics available in your data warehouse and OLAP database.

Benefits for executives and managers

- Extremely fast access to important business performance information
- Easy access to all types of charts, graphs, and metrics
- Great visuals for presentations
- Dynamic charting and analysis of key performance indicators
- Power to manage and plan more effectively
- Ability to add your custom iMIS demographics
- Less reliance on IT Staff for reports

Limitations

Analytics does not include predictive/forecasting capabilities or pattern analysis. These capabilities can be achieved by using a predictive tool that is compatible with Microsoft Analysis Services, which is beyond the scope of ASI support.

Although you can use any OLAP viewer that is compatible with Microsoft Analysis Services to browse and report on the iMIS cube created by Analytics, ASI supports Analytics only for use with ProClarity Professional.

Important Analytics concepts

iMIS Analytics can be installed without any customization, and you will have access to many useful key performance indicators by using the supplied Analytics Briefing Book for ProClarity Professional. You don't need to understand data warehousing or online analytical processing (OLAP) to gain instant value from using Analytics.

If you understand some basic concepts, however, you can take advantage of the full power of Analytics.

- If your executives and managers understand the basic elements of an OLAP cube, they can use OLAP viewers such as ProClarity Professional to create any view of iMIS data that they need, rather than relying only on the predefined views in the Briefing Book.
- If your IT staff understands some basic data warehousing concepts and the general architecture of Analytics, they can:
- Determine how to implement Analytics as a data mart in the bus architecture of a larger enterprise data warehouse solution.
- Determine which of your custom iMIS demographics (custom fields) should be added to the data warehouse to provide you with even stronger business intelligence than that offered by a non-customized implementation of Analytics.

Basic concepts for your executives and managers

iMIS Analytics is a sophisticated product that creates and maintains a robust data warehouse and a powerful OLAP cube in a special analysis database. Most of the product is invisible to you, however, working behind the scenes. If you are using the recommended ProClarity Professional viewer to analyze the data in the cube, your main exposure to the product is through the Analytics Briefing Book.

The Briefing Book contains many predefined views of your iMIS data, but sometimes you will want to see information that is not available in one of the predefined views. In these situations, you will want to use the following special features of ProClarity Professional (see your ProClarity Professional tutorial to learn more about these features):

- drill-downs

displays more granular details of a chart

When viewing any chart, you can drill down to more granular data for a particular data point by left-clicking the data point. You can also "cross-drill" to other closely related data in a background hierarchy by right-clicking the data point and choosing the hierarchy into which you want to drill-down.

- Setup Panel

  creates custom views of your iMIS data

  To define your own custom views, you use the Setup Panel to either modify an existing view in the Briefing Book, or to define an entirely new view.

Basic concepts for your IT staff

In smaller organizations, iMIS Analytics might be the only data warehouse providing you with business intelligence. In larger organizations with several major databases besides your iMIS database, the data warehousing experts in your organization can implement Analytics as a data mart in the bus architecture of a larger enterprise data warehouse solution (per the Kimball model). Describing this type of data mart implementation is beyond the scope of this document, because such implementations are highly customized solutions. A data mart implementation is possible, however, because the Analytics data warehouse uses dimensional models and a star schema, and because the Analytics OLAP cube has been designed around conformed dimensions and conformed measures (facts). Your data warehousing experts can rely on documentation for Microsoft Analysis Services or any related third-party documentation to be applicable to the design of the Analytics data warehouse and analysis database.

Whether Analytics is implemented as your only data warehouse or as a data mart, there are major decisions that you must make when implementing Analytics:

- Should the product be installed in a two-tier or single-tier server configuration?
- Which of your custom iMIS demographics (custom fields) should be added to Analytics?

- Which type of slowly-changing dimension (SCD) should you use for each custom demographic?

  Server configurations

  Analytics server components can be implemented on a single tier with your iMIS database, or spread across two hosts in a two-tier configuration:

- Two-tier: The Analytics data warehouse and analysis database are located together on one SQL Server host (the Analytics host), and your iMIS database is located on a different SQL Server host (the iMIS host). Both the Analytics host and the iMIS host must be members of the same domain.
- Single-tier: The Analytics data warehouse and analysis database are located on the same SQL Server host that contains your iMIS database. In this configuration, the Analytics host is also the iMIS host.

  The single-tier configuration is the easiest to install and use, and generally won't affect performance of your iMIS database unless you have many people constantly using the analysis database. The following information about the three databases involved in an Analytics implementation can help you determine whether a two-tier or single-tier configuration is best for your organization:

- iMIS database

  current data stored in relational tables

  Your iMIS database contains some historical records of things like donations, purchases, etc. Much of the information in your iMIS database, however, is always current data. For example, if a product description or customer's address changes, the old product description or the old customer address is not saved in the iMIS database.

- data warehouse

  historical data stored in dimensional tables using a star schema

  The Analytics data warehouse is a special database that contains a copy of all your iMIS data. The data warehouse does not use relational tables, but instead structures your data

in a dimensional model using a star schema. Because much of the copied data comprises slowly changing dimensions that preserve history (Type 2 SCDs), the data warehouse will grow over time, so space requirements for growth are a factor in determining whether to implement a two-tier or single-tier configuration. However, since the data warehouse is used only during the extraction, transform, and load (ETL) process during off-peak hours, the performance impact on the iMIS host in a single-tier configuration is negligible.

- analysis database - OLAP cube

  OLAP cube derived from data warehouse contents, using conformed dimensions and conformed measures (facts)

  The Analytics analysis database contains a copy of the information from the data warehouse, transformed into a cube in an OLAP database. As with the data warehouse, the analysis database will grow over time, so space requirements for growth are a factor in determining whether to implement a two-tier or single-tier configuration. Unlike the data warehouse, this database might be used heavily during peak hours of the business day. However, OLAP viewers such as ProClarity Professional do not generate heavy SQL activity, so the performance impact on the iMIS host in a single-tier configuration is minimal.

  Custom iMIS demographics

  The Customers feature of iMIS has a feature called the iMIS Customizer, which enables you to create custom tables for use in custom window tabs that capture your own demographic information about each customer. With some limitations, you can configure your implementation of Analytics to include your custom demographic information about each customer in the data warehouse and analysis database. The following limitations apply to custom iMIS demographics:

- Fields from custom tables that are defined to allow multiple table rows for a single customer ID (multi-instance custom tables) cannot be included in Analytics.
- Fields from single-instance custom tables are added as attributes to the Customer Ext Dim dimension.

Examining these limitations in more detail can help you plan how to Configuring Analytics to track custom iMIS demographics.

A multi-instance custom table is one for which the Multiple Instances Allowed checkbox was selected when creating the custom table with the iMIS Customizer. In a multi-instance custom table, you can have multiple records for the same customer ID. For example, you might want to send out annual surveys to each of your customers and track the survey results in a custom table that is viewable on a custom Surveys tab in the Manage Customers window. In this scenario, the Surveys tab for a specific customer would show one row for each year's survey results.

In a single-instance custom table, by contrast, there would never be multiple records for the same customer ID. For example, you might have created a custom table that tracks general demographic information for customers, such as their spouse's name and the school they attended. In this scenario, there would never be more than one row needed per customer ID to store the demographic information.

Because multi-instance custom tables can have more than one record per customer ID, Analytics cannot determine which of those multiple records to display as attributes for a specific customer when you are examining the detail information for that customer in an OLAP viewer such as ProClarity Professional. Therefore, only fields from single-instance custom tables can be included in your implementation of Analytics.

The other limitation of custom tables is that the fields from these tables are essentially extended attributes of a specific customer ID, instead of being a category of business information that could be considered a dimension member in its own right. Therefore, the custom fields that you add to Analytics are not treated as members (levels) in a dimension that you can directly graph on a chart in OLAP viewers such as ProClarity Professional. Instead, you can view the custom fields only as attributes of a specific customer, once you have drilled-down far enough into a view to display specific customers.

Slowly changing dimensions

The most difficult decision to make when configuring Analytics to track your custom demographics is which type of slowly changing dimension (SCD) to use for each demographic. In a data warehouse, the measures (facts) change very rapidly, but by comparison, the data in your dimensions change slowly. For example, a custom demographic such as staff size is likely to change over time for a given customer.

Analytics supports two types of slowly changing dimensions, as well as giving you the option to not use a slowly changing dimension for demographics that never change over time. There are two questions you should consider for each demographic that you want to track in Analytics:

- Is this demographic a value that might change over time?
- If the answer is no, then you should configure the demographic to not use a slowly changing dimension.
- If the answer is yes, then you should consider the following question to determine which type of slowly changing dimension to use.
- Do I need to preserve a history of the different values of this demographic as it changes over time, or do I care only about the most current value of this demographic?
- If you need to preserve the historical values of a demographic, you should use a Type 2 SCD.
- If you need only the current value of a demographic, you should use a Type 1 SCD.

The following information about slowly changing dimensions can also help you determine which SCD type to use for each custom field:

- Type 2

  Preserves history

  When changes occur to a Type 2 SCD, a new record is added with the new attribute information, preserving records of the old attribute information. Type 2 SCDs track history very efficiently because they create new records only when the attribute information

changes. However, because Type 2 changes add new records, they can significantly increase the size of your data warehouse.

- Type 1

  Overwrites history

  When changes occur to a Type 1 SCD, no new records are created. Instead, the change overwrites the existing attribute with new information. The old information is lost forever.

- Type 0

  Use no SCD

  A Type 0 SCD is a special value used only in Analytics to indicate that the custom demographic is not a slowly changing dimension. The demographic is a value that will never change for a given customer. The advantage of using a Type 0 SCD for custom demographics that never change is that the data warehouse requires less overhead to maintain that demographic.

Predefined views in the Analytics Briefing Book

The iMIS Analytics Briefing Book, designed for use with the recommended ProClarity Professional OLAP viewer, contains the following predefined views of the measures in the Analytics analysis database. You can easily create your own custom views and add them to the Analytics Briefing Book.

Revenue

- Revenue by Product Class
- Revenue by Country
- Revenue by Customer Type
- Revenue by Campaign
- Revenue by Customer Type - Decomp
- Revenue by Country - Decomp

- Revenue by Product Type -Decomp
- Revenue Growth

  Membership
- Committee Counts
- Membership Dues Counts
- Membership Renewal Rates

  Opportunities
- Opportunities by Stage
- Opportunities Breakdown by Stage
- Forecast Totals by Customer Type
- Opportunities by Channel Type
- Opportunities by Team

  Fundraising
- Pledges by Campaign
- Pledges by Customer Type

  Marketing
- Revenue by Campaign
- Revenue by Response Type
- Revenue by Campaign and Response Type

  Inventory
- Inventory Levels by Product and Warehouse
- Inventory Levels by Product Group

  Issues

- Issues by Issue Type
- Issues by Product Type

Accounting

- General Ledger Activity by Account Number
- General Ledger Activity by Account Name

Analytics dimensions and measures

The iMIS cube in the analysis database contains the following dimensions and measures. If you use the recommended ProClarity Professional OLAP viewer with iMIS Analytics, you can easily browse the dimensions and measures and create any needed view of your iMIS business performance. Once you have created a custom view (see "Viewing the iMIS cube for ad-hoc analysis"), you can add it to the predefined views in the Analytics Briefing Book.

Dimensions

- Campaign
- Channel
- Customer
- Customer Ext Dim (see "Configuring Analytics to track custom iMIS demographics")
- Date
- GL Account
- Group Enroll Type
- Group Expire Type
- Group
- Issue Status
- Issue Type

- Opportunity Status
- Opportunity Type
- Organization
- Product
- Promotion
- Response Media
- Sales Location
- Sales Order Details
- Sales Team
- Shipper
- Warehouse

Measure groups (facts) and measures

- GL Transaction Fact
- GL Transaction Fact Count
- Transaction Amount
- Group Enrollment Fact
- Count
- Group Enrollment Fact Count
- Group Stats Fact
- Active Count
- Downgrade
- Dropped
- Lapsed

- New
- Reinstate
- Renew
- Transfer In
- Transfer Out
- Upgrade
- Inventory Level Fact
- Cost
- Inventory Level Fact Count
- Quantity On Hand
- Quantity On Order
- Quantity Received
- Quantity Shipped
- Quantity Sold
- Issue Fact
- Issue Fact Count
- Service Provider Key
- Time to Resolve
- Total Effort
- Opportunity Fact
- Component Price1
- Component Price2
- Component Price3

- List Price
- Opportunity Fact Count
- Probability
- Purchase Budget
- Units
- Pledge Fact
- Adjustment Amount
- Amount Paid
- Open Balance
- Pledge Amount
- Pledge Fact Count
- Sales Fact
- Cost Amount
- Fair Market Value
- Gross Profit
- Quantity
- Sales Amount
- Sales Fact Count

Analytics usage

Because iMIS Analytics conforms to industry standards for OLAP databases, you can use any OLAP viewer that is compatible with Microsoft SQL Server Analysis Services to browse and report on the data in the iMIS cube created by Analytics. To help you get started, however, we have included a briefing book with Analytics that is designed to work

with the ProClarity Professional viewer. If you are using ProClarity Professional, you can open the Analytics Briefing Book and have instant access to many useful business performance views into your iMIS data.

> **Note:** Note: The following procedures assume that you are using the ProClarity Professional viewer. If you are using a different OLAP viewer, you must adapt these procedures as necessary to accommodate your preferred OLAP viewer. Go to Microsoft to download ProClarity Professional.

Analyzing iMIS business performance with the Analytics Briefing Book

The easiest way to analyze your iMIS business performance is to use the predefined iMIS Analytics Briefing Book designed for the ProClarity Professional viewer. The Analytics Briefing Book gives you instant access to many useful views into your iMIS data.

If the predefined Analytics Briefing Book does not provide iMIS business performance data that you would like to examine, you can also use ProClarity Professional to view the iMIS cube directly, drilling down into any dimension you choose. See Viewing the iMIS cube for ad-hoc analysis.

> **Note:** Note: You must use the ProClarity Professional viewer for this procedure because the supplied Analytics Briefing Book is designed for use with it. If you are using a different OLAP viewer, see your viewer's documentation for information on how to create a set of predefined views into the Analytics cubes. Go to Microsoft to download ProClarity Professional.

Before you begin

- Analytics must be properly installed and configured, and the Analytics data warehouse and analysis database must be populated with data from the iMIS database. See "Analytics implementation" for more information.
- ProClarity Professional must be installed on your computer.

- The Analytics Briefing Book must have been installed on your computer. See Installing the Analytics Briefing Book on client computers for more information.

  Scenario

  In the following sample procedure, you are reviewing annual membership dues counts for your organization. The default Analytics Briefing Book view for Membership Dues Counts shows the total annual count of dues and activity fees for active members of your entire organization, but you are interested in comparing this information against the annual growth rate for chapters. You use the Setup Panel feature in ProClarity Desktop Professional to change the rows of the Membership Dues Counts view to display trend lines for both chapter membership counts and annual dues and activity fees.

  To analyze iMIS business performance with the Analytics Briefing Book

  > **Note:** Note: See your ProClarity Professional documentation for more information.

1. In ProClarity Desktop Professional, open the Analytics Briefing Book (iMIS Analytics.bbk).
2. In the Briefing Book area, expand the Membership folder and open the Membership Dues Counts view.

   The view area displays a line chart and associated table that shows the annual number of dues and activity fee payments made by active members across the entire organization.
3. From the main menu, choose View > Setup Panel.

   The Setup Panel appears.
4. In the Rows list, right-click Group Type - Children of Dues and choose Select Items.

   The Select Items tab appears, with the Children of Dues item of the Group Type hierarchy selected.
5. Multi-select the Chapters level and the Dues level (hold Ctrl while clicking each level in the list), ensuring that you first deselect the Children of Dues item.

   The Select Items tab now shows that only Chapters and Dues are selected.

6. From the main menu, choose View > Apply Now.

   The view displays your query results, using a line chart that compares the annual number of dues and activity fee payments to the annual number of members in all chapters.

Viewing the iMIS cube for ad-hoc analysis

If the predefined views in the iMIS Analytics Briefing Book for ProClarity Professional do not provide the specific iMIS business performance data that you would like to examine, you can use the Setup Panel feature of ProClarity Desktop Professional to create custom views of the measures and hierarchies available in the iMIS cube.

The following procedure uses one specific scenario to demonstrate how to create ad-hoc views of the iMIS cube using ProClarity Professional. You can adapt this procedure as necessary to perform ad-hoc analysis of other types of iMIS information.

> **Note:** Note: If you are not using the ProClarity Professional viewer, you must adapt this procedure as necessary for your choice of OLAP viewer. See your viewer's documentation for more information.

Before you begin

- Analytics must be properly installed and configured, and the Analytics data warehouse and analysis database must be populated with data from the iMIS database. See "Analytics implementation" for more information.
- ProClarity Professional must be installed on your computer.
- The Analytics Briefing Book must have been installed on your computer. See Installing the Analytics Briefing Book on client computers for more information.

Scenario

In the following sample procedure, you want to analyze membership data that is not available as a default view in the Analytics Briefing Book. You use ProClarity Professional to create a new view that shows the total count of specific member types per calendar year, based on their membership subscription begin dates. Because this is a view you might

want to review later, you then save the new view for easy access the next time you want to examine the same information.

To view the iMIS cube for ad-hoc analysis

> **Note:** Note: See your ProClarity Professional documentation for more information about performing the following steps.

1. In ProClarity Professional, open the Analytics Briefing Book (iMIS Analytics.bbk).
2. Find a pre-defined view that already uses the type of chart you think would be most appropriate for interpreting the membership data that you want to analyze. For example, the Membership Renewal Rates view uses a line chart that makes it easy to see growth trends, along with a supplemental grid that contains raw counts for each data point.
3. From the main menu, choose View > Setup Panel.

   The Setup Panel appears.
4. In the Hierarchies tab, ensure that the Group Enrollment Fact measure group is the currently filtered list of available hierarchies and measures. If not, click the hierarchy filter beneath the tab name and choose Group Enrollment Fact from the resulting menu.

   The list of available hierarchies in the Group Enrollment Fact measure group appears.
5. Define the rows and columns of your new ad-hoc query.

- Expand the Customer category and drag its Customer.Type hierarchy into the Rows list.
- Drag all other existing hierarchies out of the Rows list.

  The Rows list now contains only the Customer.Type hierarchy.
- In the hierarchy list, expand the Date Begin category and drag its Date Begin.Calendar hierarchy into the Columns list.
- Drag all other existing hierarchies out of the Columns list.

  The Columns list now contains only the Date Begin.Calendar hierarchy.

6. Refine the row and column hierarchies to include only the specific hierarchy members that you want to examine.

- In the Rows list, right-click the Customer.Type hierarchy and choose Select Items.

  The Select Items tab displays the levels and members of the Customer.Type hierarchy.

- Expand the All level and multi-select the customer types that you want to examine (hold Ctrl while clicking each customer type in the list), ensuring that you first deselect the Default (All) level at the top of the list. For example, you might select all of the following customer types:

- Associate Member
- Company Member
- CPA Member
- Individual Member
- Student Member

- In the Columns list, right-click the Date Begin.Calendar hierarchy and choose Select Items.

  The Select Items tab displays the levels and members of the Date Begin.Calendar hierarchy.

- Expand the All level and multi-select the specific calendar years that you want to examine, ensuring that you first deselect the Default (All) level at the top of the list.

7. Define the measure to use for the background of the query.

- In the Background list, right-click the currently-displayed measure and choose Select Items.

  The Select Items tab displays the measures that are available in the Group Enrollment Fact measure group.

- Select the Count measure.

8. (optional) In the Columns list, click the Filter Empty Columns button to ensure that your query won't display years for which there is no data.
9. From the main menu, select View > Apply Now.

   The view displays your query results, using a line chart that enables you to see growth trends and a supplemental grid of tabular membership subscription begin counts for each year.
10. (optional) Change the chart style to a bar chart by right-clicking in the chart area and choosing Chart Type > Bar Chart.

    The view displays a bar chart of the same data, which makes it easy to compare the ratio of membership subscription started in each calendar year.
11. You decide that you want to save this view for easy access in the future. You can do so by either saving it as a personal view under My Views, or by adding the view to the briefing book (which enables you to share it with others by giving them a copy of the briefing book).

Analytics implementation

Business intelligence solutions can be complicated to implement because they require:

- Understanding online analytical processing (OLAP) concepts and implementation.
- Setting up special OLAP databases: the data warehouse and the analysis database.
- Configuring and scheduling Integration Services packages that periodically extract data from your iMIS database, load the data into your data warehouse, and transform the contents of your data warehouse into cubes in the analysis database.
- Learning and using OLAP viewer software to analyze the cubes in your analysis database.

  Depending on your organization's experience with implementing business intelligence solutions, you might involve ASI Consulting to ensure you achieve your business intelligence goals quickly.

Analytics system requirements

iMIS Analytics comprises some program files, OLAP database components, and a briefing book designed for the third-party product ProClarity Professional. The OLAP database components can be installed to the same SQL Server host that contains your iMIS database (a single-tier configuration), or they can be installed to a separate SQL Server host (a two-tier configuration).

- The server host on which the Analytics program is installed is the iMIS application server (appserver).
- The SQL Server host on which the OLAP database components reside is the Analytics host.
- The SQL Server host on which the iMIS database resides is the iMIS host.
- If you installed the OLAP database components on the same host as the iMIS database, the Analytics host is also the iMIS host.

  Analytics is installed as an optional component by performing a Custom installation with the iMIS installer on an application server host.

  iMIS application server requirements

- iMIS application server hosts must meet all stated application server requirements for iMIS.
- The database server host that contains the SQL Server instance in which you want to create your Analytics data warehouse and analysis database must also have a default instance of SQL Server installed on it, and that default instance must have Microsoft SQL Server Integration Services (SSIS) installed. This is required by the Integration Services packages used by Analytics.
- ProClarity Professional (version must support SQL Server Analysis Services)

  Caution! Install ProClarity Professional on the iMIS application server before installing Analytics. If it is not present on the appserver when you install Analytics, the Briefing Book will be missing connection information.

- For best results, use the same versions of Windows Server and SQL Server on both the iMIS and Analytics host servers. If you must combine 32-bit and 64-bit servers and/or 2005 and 2008 versions of SQL Server, ensure that your iMIS host has version of SQL Tools that matches that of your Analytics host:

iMIS Host	Analytics Host	Compatibility requirement
32-bit + SQL 2005	64-bit + SQL 2005	No issues.
32-bit + SQL 2005	32-bit + SQL 2008	Install SQL 2008 Tools and integration services on the iMIS host.
32-bit + SQL 2005	64-bit + SQL 2008	Install Analytics from the 64-bit host (32-bit cannot remotely configure 64-bit).
64-bit + SQL 2008	32-bit + SQL 2005	Install SQL 2005 Tools on the iMIS host.
64-bit + SQL 2008	32-bit + SQL 2008	No issues.
64-bit + SQL 2008	64-bit + SQL 2005	Install SQL 2005 Tools on the iMIS host.

Analytics host system requirements

- The Analytics host must meet all database server requirements for iMIS, as well as these more specific requirements:
- 10/100 Mbps network speed (or faster) connection to all related iMIS application server hosts and to all client computers that are running ProClarity Professional
- Microsoft SQL Server (non-Express Edition version only)
- Microsoft Analysis Services, which must be installed in the default location: C:\Program Files\Microsoft Analysis Services
- Microsoft SQL Server Business Intelligence Development Studio

- The database server host that contains the SQL Server instance in which you want to create your Analytics data warehouse and analysis database must also have a default instance of SQL Server installed on it, and that default instance must have Microsoft SQL Server Integration Services (SSIS) installed. This is required by the Integration Services packages used by Analytics.
- If Analytics is installed on a separate database server host from the iMIS database server host, both hosts must be members of the same Windows domain, and both hosts must be configured to allow network DTC access (see "Enabling network DTC access for multi-server configurations"). This is required by the Integration Services packages used by Analytics.

  iMIS host system requirements
- The iMIS host must meet all stated database server requirements for iMIS.
- The iMIS database must contain the license key for Analytics.

  Workstation requirements
- OLAP viewer software; ProClarity Professional recommended.

  Although you can use any OLAP viewer to browse the Analytics cubes, the Analytics Briefing Book is designed to work with ProClarity Desktop Professional. The Analytics Briefing Book contains many useful predefined views to help you analyze your iMIS business performance.
- Processor speed, memory, and disk space sufficient to meet the requirements for ProClarity Professional
- Workstations running ProClarity Professional must be able to address the Analytics host by using a standard Windows domain computer name

  Note: Note: Using ProClarity Professional on a remotely-accessed Terminal Server or Citrix machine is untested.

Note: Note: VPN connections from ProClarity Professional on a workstation to the domain containing the Analytics host is untested.

Installing Analytics

You can install iMIS Analytics in a two-tier or single-tier configuration. See Basic concepts for your IT staff to determine which configuration is best for your implementation of Analytics.

Before you begin

- Make sure that the Analytics host, iMIS host, and iMIS application server all meet the Analytics system requirements.
- Note the SQL connection information for the iMIS database on the iMIS host, and for the SQL environment on Analytics host, if you are installing a two-tier configuration.
- Make sure your iMIS product license keys include the key for Analytics.

Installation scenarios

Installing Analytics requires extra steps if you are upgrading iMIS and/or Analytics:

Neither iMIS nor Analytics has been installed in your organization before, so you are installing both products at the same time.	Perform a standard installation of iMIS, choosing a Custom installation and selecting the optional component iMIS Analytics.
Analytics has never been installed before, but you currently have iMIS 15.1.3 or higher installed. You are therefore installing Analytics and upgrading iMIS.	Perform these tasks in the order listed: • Perform a standard upgrade of iMIS, choosing a Complete installation. Warning: do not install Analytics now! • Verify that iMIS is working properly. • Install Analytics from Add/Remove Programs (see below).

	• Run the package to populate the new analysis database installed by this latest release of Analytics.
You have both Analytics 1.0 and iMIS 15.1.3 or higher installed. You are therefore upgrading both products. Caution: You must do so in two separate passes.	Perform these tasks in the order listed: • Upgrade the SQL Server environment on your Analytics host as needed. • Ensure that the Analytics host meets all requirements. • Perform a standard upgrade of iMIS, choosing a Complete installation. Warning: Do not install Analytics now! • Verify that iMIS is working properly. • Install Analytics from Add/Remove Programs (see below). • Migrate your data warehouse (see "Migrating the Analytics 1.0 data warehouse") to the newly installed one. • Run the package (see "Manually running the Update iAnalytics package") to populate the new analysis database. • Verify that Analytics is working properly. • Delete the old data warehouse and analysis database from your SQL Server environment. Only the new iMIS_Analytics data warehouse and iAnalytics analysis database should remain.

To configure SQL Server 2012 services for Analytics

If you are using a separate host machine for Analytics, you need to set all of the SQL Server 2012 services to log on with the Local System account.

1. After you install SQL Server 2012, open Start > Administrative Tools > Services.
2. Set Log On > Log on As to use the Local System account on each of the SQL Server services:

- SQL Server
- SQL Agent
- Analysis Service
- Integration Services

3. Restart all of the services.

To install Analytics from Add/Remove Programs

> **Note:** Caution! Perform this procedure only if your scenario above directs you to do so.

1. Modify the existing iMIS installation by using Add or Remove Programs.

- From the application server's desktop, choose Start > Control Panel > Add or Remove Programs.

  The Add or Remove Programs window appears.

- From the list of Currently installed programs and updates, select iMIS and click Change/Remove.

  The welcome page of the iMIS - InstallShield Wizard appears.

- Select Modify and click Next.

  The Select Features page appears.

- Important! Every checkbox that is currently selected should remain selected to prevent the removal of existing iMIS components.

  Caution! If an already-installed component is selected on this page, the wizard should maintain installation of that component in subsequent steps. Ensure that every checkbox remains checked.

- In the Optional Components section, select the iMIS Analytics checkbox and click Next.

  The iMIS Analytics page appears.

2. Specify the connection information for the Analytics data warehouse and analysis database.

- (optional) From the iMIS Analytics SQL Server instance drop-down list, select a different SQL Server instance in which you want to create your Analytics data warehouse and analysis database.

  Caution! The database server host that contains the SQL Server instance you specify must also have a default instance of SQL Server installed on it, and that default instance must have Microsoft SQL Server Integration Services (SSIS) installed. If not, the Integration Services packages used by Analytics will not run successfully.

- (optional) In the Data warehouse name field, replace the default name for the Analytics data warehouse with a new name of your choosing.

- (optional) In the Analysis database name field, replace the default name for the Analytics analysis database with a new name of your choosing.

3. Click Next.

   The Specify iMIS configuration page appears, but it is blank because you cannot change any values associated with the current iMIS installation.

4. Click Next.

   The Review modify settings page appears.

5. Ensure that the installation settings are accurate and click Next.

The wizard displays setup status as it copies files and configures Analytics, and then the Maintenance Complete page appears.

6. Review all messages that are displayed on the completion page and take appropriate actions as needed.
7. Click Finish.

Migrating the Analytics 1.0 data warehouse

When upgrading from iMIS Analytics 1.0 to the current release of Analytics, as described in Installing Analytics, you must manually migrate your data warehouse tables from Analytics 1.0 into the new iMIS_Analytics data warehouse that is created when you install the current release of Analytics.

> **Note:** Caution! Certain tables and views must not be imported from the older data warehouse. These objects are listed in the following procedure.

Before you begin

- All Analytics system requirements for the Analytics host must be in place.
- The following procedure must be performed on the Analytics host.

To migrate the Analytics 1.0 data warehouse to the Analytics 15.0.x data warehouse

1. Using Microsoft SQL Server Management Studio, connect to the Database Engine on the Analytics host.
2. In the Object Explorer pane, expand the Databases folder.
3. Right-click the iMIS_Analytics database and choose Tasks > Import Data.

   The welcome page of the SQL Server Import and Export Wizard appears.
4. Click Next.

   The Choose a Data Source page appears.

5. Using the Server name and Database fields, specify your Analytics 1.0 data warehouse, then click Next.

   The Choose a Destination page appears.

6. Click Next without changing any values.

   The Specify Table Copy or Query page appears.

7. Select Copy data from one or more tables or views, then click Next.

   The Select Source Tables and Views page appears.

8. In the first column, select every table except for the following:

- DWMColumn
- DWMTable
- DWParameters

9. Ensure that you have not selected any views in the list, then click Next.

   The Save and Execute Package page appears.

10. Ensure that the Execute immediately checkbox is selected and click Finish twice to begin importing the selected tables from the old data warehouse.

    The wizard displays status while it imports the tables.

Enabling network DTC access for multi-server configurations

Due to stronger security on network communications enabled by recent service packs on Microsoft server operating systems (and present by default in newer server operating systems), network Distributed Transaction Coordinator (MSDTC) access might be disabled on one or both of the SQL server hosts in a multi-server configuration of iMIS Analytics.

If you have installed Analytics in a multi-server configuration, you must ensure that both the iMIS host and the Analytics host are configured to allow network DTC access.

Before you begin

Ensure that both your Analytics host and your iMIS host meet all system requirements (see "Analytics system requirements").

To enable network DTC access for multi-server configurations

1. On the Analytics host, choose Start > Control Panel > Administrative Tools > Component Services.

   The Component Services window appears.

2. In the console tree, click Component Services, then expand the Computers sub-folder.

   The My Computer icon appears in the console tree.

3. Right-click the My Computer icon and choose Properties.

4. On the MSDTC tab, click Security Configuration.

   The Security Configuration window appears.

5. In the Security Settings area, ensure that all of the following checkboxes are selected:

- Network DTC Access
- Allow Remote Clients
- Allow Remote Administration
- Allow Inbound
- Allow Outbound
- Enable XA Transactions

6. In the Transaction Manager Communication section, ensure that the Mutual Authentication Required option is selected.

7. Click OK.

   A confirmation message to stop and restart the MSDTC service appears.

8. Click Yes, then click OK at all further messages and windows.

9. Repeat this process on the iMIS host.

Manually running the Update iAnalytics package

When you install iMIS Analytics, the setup program creates a scheduled Integration Services package named Update instanceName_analysisDBName on the Analytics server host. The package extracts data from the iMIS database, updates the Analytics data warehouse, and updates the Analytics cubes.

The package is scheduled by default to run every night at 4:00 a.m. server time, but you can modify the schedule by using the procedure described in Changing the scheduled run time of the Update iAnalytics package.

You might occasionally need to manually execute this package during the business day, such as after first installing Analytics (to populate the data warehouse and cubes), or when configuring Analytics to track custom iMIS 10 demographics (see "Configuring Analytics to track custom iMIS demographics").

Before you begin

Analytics must be properly installed and configured. See Installing Analytics for more information.

> **Note:** Note: Depending on the size of your iMIS database, this process can take a long time to complete.

To manually run the Update iAnalytics package

1. Launch SQL Server Management Studio.

   Note: For SQL Server 2012, you must run as administrator: right-click SQL Server Management Studio and select Run As Administrator.

2. Connect to the Database Engine on the Analytics host.
3. In the Object Explorer pane, browse to SQL Server Agent > Jobs.

   The Summary Page displays the scheduled jobs on the Analytics host.

4. Right-click the Update instanceName_analysisDBName job and choose Start Job at Step.

   The Start Jobs window appears and displays status while it runs the job. When the job has completed successfully, the Start Jobs window displays a success message.

   Troubleshooting issues with the Update iAnalytics package

   If the facts in the iMIS cube have no data or if the data does not match the contents of the data warehouse after running the Update iAnalytics package (evidenced by the Briefing Book showing no data or incorrect or old data), you must run two stored procedures to fix the problem. This needs to be done only once.

1. Using Microsoft SQL Server Management Studio, connect to the Database Engine on the Analytics host.
2. Use the query window to execute the following two stored procedures, with the listed parameters:

   exec asi_dwSetLAll 1

   exec asi_DWSInitDB

3. Re-run the Update iAnalytics package.

Changing the scheduled run time of the Update iAnalytics package

The Integration Services package Update instanceName_iAnalytics is scheduled by default to run every night at 4:00 a.m. server time, provided that the SQL Server Agent is started. This package extracts data from the iMIS database, updates the iMIS Analytics data warehouse, and updates the Analytics cubes. You can specify any schedule for this package.

> **Note:** Note: Depending on the size of your iMIS database, this process can take a long time to complete.

Before you begin

Analytics must be properly installed and configured. See Installing Analytics for more information.

To change the scheduled run time of the Update iAnalytics package

1. Using Microsoft SQL Server Management Studio, connect to the Database Engine on the Analytics host.
2. In the Object Explorer pane, browse to SQL Server Agent > Jobs.

   The Summary Page displays the scheduled jobs on the Analytics host.
3. Right-click the Update instanceName_iAnalytics job and choose Properties.

   The Job Properties window appears.
4. On the Schedules page, from the Schedule list, select Update instanceName_iAnalytics.
5. Click Edit.

   The Job Schedule Properties window appears, displaying the current schedule for the Update instanceName_iAnalytics job.
6. Modify the schedule and click OK several times to close all open dialogs.
7. If the SQL Server Agent is not already started, right-click the SQL Server Agent object and choose Start.

Installing the Analytics Briefing Book on client computers

Users in the organization who have ProClarity Professional installed on their computers can use the supplied iMIS Analytics Briefing Book to analyze the data on the Analytics host. The Briefing Book is pre-configured with all the required connection information, so you need only to copy the Briefing Book from the iMIS application server where Analytics is installed to each user's computer.

Note: Note: If you did not install ProClarity Professional on the appserver before installing Analytics, the Briefing Book will be missing required connection inform-

ation. In this case, manually configure the connection information in the Briefing Book before you distribute it to Analytics users.

Before you begin

- Analytics must be properly installed (see "Installing Analytics") and configured.
- A version of ProClarity Professional that supports SQL Server Analysis Services must be installed on the user's computer.
- The client computer must be able to address the Analytics host (the database server host where the Analytics data warehouse and analysis database are installed) by using a standard Windows domain computer name.

To install the Analytics Briefing Book on client computers

Note: Note: See your ProClarity Professional documentation for details.

1. Use Windows Explorer to copy the iMIS Analytics.bbk file from the Analytics folder on an iMIS application server where the optional Analytics product was installed (usually C:\Program Files\ASI\iMIS\Analytics).
2. Paste the iMIS Analytics.bbk file into an appropriate folder in the client computer (such as the user's My Documents folder).
3. Open the iMIS Analytics.bbk file in ProClarity Professional.

   The Analytics data appears.

Troubleshooting connection issues with the Analytics Briefing Book

If the Briefing Book does not display the Analytics data, but instead prompts you to enter your username and password, the Briefing Book failed to connect to the Analytics host. This could be caused by one or both of the following issues:

- The SQL Server host where the Analytics data warehouse and analysis databases are located is not addressable from the client computer by using a standard Windows domain computer name.

- The Briefing Book is missing connection information, which can occur if you install Analytics before installing ProClarity Professional on an iMIS appserver.

Use the following steps to correct these issues:

1. Work with your network administrator and your database administrator to ensure that the client computer can address the Analytics host by domain name.
2. In ProClarity Desktop Professional, use the Change Connection Information Wizard to examine and modify the connection information defined in your original copy of iMIS Analytics.bbk Briefing Book. You must ensure that the Briefing Book uses the following values:

- Provider - MSOLAP (SQL 9.0)
- Server Name - the full domain name of the SQL Server instance that contains your Analytics analysis database (the Analytics host). If Analytics is installed in a named instance, you must use the naming convention [hostDomainName]\[instanceName].
- Catalog - iAnalytics (this is configurable)
- Cube - iMIS

Granting read access to the analysis database

To enable people who aren't SQL Server administrators to view the Analytics analysis database by using the Analytics Briefing Book, you must enable the Everyone role in SQL Server to have read access to the analysis database.

Before you begin

- Analytics must be properly installed and configured. See Installing Analytics for more information.

To grant read access to the analysis database

1. Using Microsoft SQL Server Management Studio, connect to Analysis Services on the Analytics host.

2. In the Object Explorer pane, expand the tree to view the contents of the Databases > iAnalytics > Roles folder.
3. Right-click the everyone role and choose Properties.

   The Edit Role window appears.
4. On the Data Sources page, in the iAnalytics data source row, specify Read access and select the Read Definition checkbox.
5. On the Cubes page, in the iMIS cube name row, specify Read access, Drillthrough local cube/drillthrough access, and select the Process checkbox.
6. Click OK to save your changes.

Configuring Analytics to track custom iMIS demographics

You can track custom iMIS demographics (custom fields) as attributes in the iMIS Analytics customer dimensions. Only fields from single-instance custom tables can be tracked in Analytics. If there is demographic data in multi-instance custom tables that you want to track in Analytics, you must redefine the data in iMIS as a single-instance custom table. Consult your Authorized iMIS Solution Provider (AiSP) for assistance with this process.

Before you begin

- Read Custom iMIS Demographics and Slowly Changing Dimensions in Basic concepts for your IT staff.
- Perform this procedure on the iMIS application server where Analytics is installed.
- If SQL Server Business Intelligence Development Studio (or any Visual Studio-based window) is currently open on the host, close the window before starting this procedure. If Visual Studio is left open during the early parts of this procedure, you might have difficulty viewing newly-added custom fields.

To configure Analytics to track custom iMIS demographics

> **Note:** Caution! The Analytics Configuration tool used in this procedure is meant primarily for advanced development and customization of Analytics. Using this tool for any purpose other than the specific goals of this procedure is unsupported at this time.

1. On the iMIS application server where Analytics is installed, open your Analytics folder, such as C:\Program Files\ASI\iMIS\Analytics.
2. Double-click AnalyticsConfiguration.exe.

   The Analytics Configuration window appears.
3. In the i15.UseCustomerExtensions row, set the Value to 1.
4. Click File > Save.
5. Choose Tools > Mappings.

   The Analytics Mappings window appears.
6. From the Table List, select the CustomerExt dimension table.

   The editor grid displays all of the fields from single-instance custom tables in the iMIS database that can be tracked in Analytics.
7. Select the fields to track and specify their slowly changing dimension (SCD) type:

- In the Active column, select the checkbox corresponding to each custom field that you want to track in Analytics.
- In the SCD Type column, specify which slowly changing dimension type to use for each field that you marked as Active:
- Enter 2 to specify Type 2 (preserves history). Use this slowly changing dimension (SCD) type if you want to preserve a history of older attribute values in the data warehouse (by adding new records) when the custom field is changed in iMIS.
- Enter 1 to specify Type 1 (overwrites history). Use this SCD type if you want to always overwrite the current attribute value in the data warehouse when the custom field is

changed in iMIS.

- Enter 0 to never update records. Use this special value for attributes that you never want to update from its original value when first extracted into the data warehouse.

8. Click Save to save the changes that you have made to the CustomerExt table definition.
9. Close the Analytics Mappings window.
10. Connect to the Analytics analysis database
    - Choose Start > All Programs > Microsoft SQL Server > SQL Server Business Intelligence Development Studio.

      The Visual Studio window appears.
    - Choose File > Open > Analysis Services Database.

      The Connect To Database window appears.
    - In the Server field, specify the SQL Server instance that contains your Analytics analysis database. This field is case-sensitive.
    - From the Database drop-down list, select your analysis database (named iAnalytics by default).
    - Click OK.

      The Solution Explorer pane displays the contents of your analysis database.
11. Update the Analytics data warehouse structure to incorporate the new iMIS custom fields.
    - In the Solution Explorer, in the Data Source Views folder, right-click the iAnalytics data source view and choose Open.

      The iAnalytics data source view appears.
    - In the toolbar area for the data source view, click the Refresh Data Source View icon.

      The Refresh Data Source View window appears. All of the iMIS custom fields that you marked as Active in the Analytics Mappings window should be listed as Added for the DWCustomerExtDim table.

- Click OK.
- The DWCustomerExtDim table in the data source view is updated to include new columns for each of the iMIS custom fields.
- Choose File > Save All to save the changes to the data source view and to update the Analytics data warehouse structure accordingly.

12. Update the Analytics analysis database dimensions to incorporate the new columns that you added to the data warehouse.

- In the Solution Explorer, in the Cubes folder, right-click the iMIS cube and choose Open.

  The Cube Structure tab for the iMIS cube appears.
- In the toolbar area for the Cube Structure tab, click the Add Cube Dimension icon.

  The Add Cube Dimension window appears.
- From the Select dimension list, select Customer Ext Dim and click OK.

  The Customer Ext Dim dimension is added to the Dimensions lists.
- In the Hierarchies tab of the Dimensions list, right-click the Customer Ext Dim dimension and choose Edit Dimension.

  The Dimension Structure tab for the Customer Ext Dim dimension appears.
- In the Data Source View, locate the DWCustomerExtDim data source and scroll the list of columns in the data source until the new iMIS custom fields are visible.
- For each column in the DWCustomerExtDim data source that corresponds to the new iMIS custom fields that you want to track in Analytics, perform the following steps.

1. Multi-select all of the columns (hold Ctrl while selecting each column).
2. Right-click the selected columns and choose New Attribute from Column.

   The columns are added to the Attributes list for the Customer Ext Dim dimension.

- Choose File > Save All to save the changes to the Customer Ext Dim dimension and the iMIS cube in the analysis database.

The Microsoft Visual Studio window appears, prompting you to reprocess various objects in the analysis database.

- Click Yes.

  The Process Object(s) window appears.

- Click Run.

  The Process Progress window appears and displays status while the analysis database is reprocessed.

- When the reprocessing has completed and the Status field displays Process succeeded, close all SQL Server Business Intelligence Studio windows.

13. Update the data warehouse and analysis database with the new custom fields from the iMIS database by manually running the Update iAnalytics package.
14. Verify that the new custom fields are available in Analytics.
    - Open the iMIS Analytics.bbk file in ProClarity Professional.

      The Analytics data appears.

    - In the Briefing Book area, expand the Revenue folder and select the Revenue by Product Class view.

      The Revenue by Product Class view appears.

    - Choose View > Setup Panel.

      The Setup Panel appears.

    - Verify that the Customer Ext Dim dimension is listed in the Custom Hierarchies for the view.

    - Expand the Customer Ext Dim dimension and verify that the new custom fields from the iMIS database are listed as attributes in the dimension.

15. Create a new view that uses one of the custom fields.

- Ensure that the Revenue by Product Class view is still displayed, and the Customer Ext Dim dimension is still expanded in the Setup Panel.
- Right-click an attribute in the Customer Ext Dim dimension that corresponds to one of the new custom fields and choose Move to Rows.

  The attribute appears at the top of the Rows list of the Setup Panel.
- In the Rows list, select and drag the attribute from the top of the list to the bottom (immediately after the Product Class hierarchy.
- Choose View > Apply Now.

  The table portion of the view changes to display new sub-rows within each of the product class rows, and the graph portion also changes accordingly to show more granular breakdowns of each product class based on the attribute that you added to the view. For more information, see Viewing Analytics cubes for ad-hoc analysis (see "Viewing the iMIS cube for ad-hoc analysis").

Defining a default country code

Several dimensions in the cube created by iMIS Analytics rely on the Country portion of a contact record's address information. For this reason, it is important to assign a default country code to iMIS contact records that are missing country information.

When the Analytics data warehouse is populated, a special country code (USA by default) is inserted into data from iMIS that does not contain country information. You can change this default country code to a different value at any time.

> **Note:** Note: Changes you make to the default country code affect only the Analytics data warehouse and analysis database. This code is not inserted into your iMIS database. Changes that you make to the default country code are not retroactive.The new default country code will be used only for new records that are brought into the data warehouse.

Before you begin

- You must perform this procedure on the iMIS application server where Analytics is installed.
- Analytics must be properly installed and configured. See Installing Analytics for more information.
- If SQL Server Business Intelligence Development Studio (or any Visual Studio 2005-based window) is currently open on the host, close the Visual Studio window before starting this procedure.

To define a default country code

> **Note:** Caution! The Analytics Configuration tool used in this procedure is meant primarily for advanced development and customization of Analytics. Using this tool for any purpose other than the specific goals of this procedure is unsupported at this time.

1. On the iMIS application server where Analytics is installed, open Windows Explorer and navigate to the C:\Program Files\ASI\iMIS\Analytics folder.
2. Double-click AnalyticsConfiguration.exe.

   The Analytics Configuration dialog appears.
3. In the i15.DefaultBlankCountry row, set the Value to a valid 2- or 3-digit country code.
4. Click File > Save.
5. Update the data warehouse and analysis database by manually running the Update iAnalytics Integration Services package. (For more information, see Manually running the Update iAnalytics package.)

Defining the fiscal year used by Analytics

iMIS Analytics is configured at installation time to use the fiscal year that is currently defined in the AR/Cash feature of iMIS. If you later change the defined fiscal year in iMIS, you must manually configure Analytics accordingly so that the fiscal year is the same in both products.

> **Note:** Note: Changes you make to the fiscal year in Analytics affect only the Analytics data warehouse and analysis database.

Before you begin

- You must perform this procedure on the iMIS application server where Analytics is installed.
- If SQL Server Business Intelligence Development Studio (or any Visual Studio 2005-based window) is currently open on the host, close the Visual Studio window before starting this procedure.

To define a default country code

> **Note:** Caution! The Analytics Configuration tool used in this procedure is meant primarily for advanced development and customization of Analytics. Using this tool for any purpose other than the specific goals of this procedure is unsupported at this time.

1. On the iMIS application server where Analytics is installed, open Windows Explorer and navigate to the C:\Program Files\ASI\iMIS\Analytics folder.
2. Double-click AnalyticsConfiguration.exe.

   The Analytics Configuration dialog appears.
3. In the i15.ETL.FiscalYearBegins row, set the Value to a number from 1 to 12 that corresponds to the calendar month in which the fiscal year begins. For example, if the fiscal year begins in April, enter 4.
4. Click File > Save.
5. Update the data warehouse and analysis database by manually running the Update iAnalytics Integration Services package. (For more information, see Manually running the Update iAnalytics package.)

Securing Analytics

iMIS Analytics provides no security capabilities beyond that supported by Microsoft SQL Server. Use Microsoft SQL Server Management Studio to define security roles and permissions for the Analytics data warehouse and for the Analytics cubes.

- Connect to the Database Engine on the Analytics host to define properties for the Analytics data warehouse.
- Connect to Analysis Services on the Analytics host to define properties for the Analytics cubes.

Uninstalling Analytics

Because iMIS Analytics comprises SQL Server and Analysis Services databases, Integration Services packages, jobs, and Briefing Book files for ProClarity Professional, the Windows uninstall process cannot completely remove all Analytics components. After removing Analytics by using the Windows Add or Remove Programs utility, you must also manually remove some Analytics components.

To uninstall Analytics from the Analytics host

1. On the Analytics host, choose Start > Control Panel > Add or Remove Programs.

   The Add or Remove Programs window appears.

2. From the program list, select iMIS and click Change/Remove.

   The Welcome page of the iMIS - InstallShield Wizard appears.

3. Select the Modify option and click Next.

   The Select Features page appears.

4. Clear the iMIS Analytics checkbox located beneath the Optional Components node.

5. Click Next.

   The wizard displays status information as it removes Analytics. When the uninstallation is complete, the Maintenance Complete page appears.

6. Click Finish.
7. Remove SQL Server Analysis Services components that are specific to Analytics.

- Use SQL Server Management Studio to connect to Analysis Services on the Analytics host.
- Remove the database named iAnalytics (the analysis database)

8. Remove SQL Server Database Engine components that are specific to Analytics.

- Use SQL Server Management Studio to connect to Database Engine on the Analytics host.
- Remove the following components:
- The database named iMIS_Analytics (the data warehouse)
- The SQL Server Agent job named Update instanceName_analysisDBName

9. Remove SQL Server Integration Services components that are specific to Analytics.

- Use SQL Server Management Studio to connect to Integration Services on the Analytics host.
- Remove the stored package named Update instanceName_analysisDBName (located in the MSDB folder)

To uninstall Analytics from client computers

- Use Windows Explorer to remove the briefing book (iMIS Analytics*.bbk).

AR/Cash Administration

Month-End Procedures

There are several month-end procedures associated with AR/Cash.

From AR/Cash, select Process month-end procedures to complete one of the following month-end procedures:

- Create GL journal
- Create credit invoices
- Purge old invoices and transactions

> **Note:** Note: After all transactions have been entered for a month, all batches for the month should first be posted before creating the GL journal, creating credit invoices, and purging old invoices and transactions.

> **Note:** Note: See Deferred Income in iMIS.

Creating the general ledger journal

> **Note:** Note: This feature is available only if you are licensed for General Ledger Interfaces.

The GL Journal feature allows you to transmit your cumulative iMIS-generated accounting transactions to the GL module monthly or more frequently.

Before exporting your GL journal data, print an audit trail report by selecting Transaction Lists from the Report Types drop-down list to review what you are about to export. The appropriate report choice may depend upon the summary level you selected for the GL interface entry. If you summarize at the monthly level, a recommended selection is Transaction Lists from the Report Types drop-down list and then the AR/Cash Distribution Summary report from the Available Reports drop-down list. You should also print a trial

balance by selecting Account Status from the Report Types drop-down list and Trial Balance from the Available Reports drop-down list.

When the GL interface is run, the following actions are performed:

- Entries are created to move deferred income to current income
- Due To-Due From tables are created as needed
- The transaction posting flag is set so that the transaction cannot be posted again

> **Note:** Note: For more on the GL Journal feature and specific GL packages, see General Ledger Interfaces.

Transaction lists report format

Transaction lists reports include the following:

- AR/Cash Daily Distribution Summaries - Provides an accounting entry recap by day for each of the days included in the Select Date Range window.
- AR/Cash Distribution (Detail or Summary) - Lists entries generated throughout all iMIS modules, sorted by pseudo-account number and listing actual GL account numbers, if assigned.
- AR/Cash Transactions - Yields the same format as the transaction journal, but prints transactions generated throughout all iMIS modules. Like the AR/Cash journal, this report lists detail audit trails of transactions and a summary report by GL account (or pseudo GL account). It lists any transactions not purged in the specified date range.

To run the Transaction Lists Distribution Summary

The Transaction Lists: AR/Cash Distribution Summary report provides a simple summary by GL account number. If there is anything wrong (such as invalid account numbers), you can address these errors before proceeding.

1. From AR/Cash, select Generate Reports to open the Generate reports window.

2. Select Transaction Lists from the Report Types drop-down list.
3. Select AR/Cash Distribution Summary from the Available Reports drop-down list.
4. Click Set Report Destination and select a report destination (for example, printer, screen, or file).
5. Select any desired options (for example, margins) from the Options drop-down menu.
6. Click Run.
7. The AR/Cash Distribution Summary: Select Date Range window displays. Enter the date range of the transactions to include in the GL interface entry.
8. Click OK.

To create the GL Journal

1. From AR/Cash, select Process month-end procedures, and click Create GL Journal.

   A message appears requesting verification of the request.

2. Click Yes.

   The General Ledger Interface: Select Date Range window appears.

3. Enter the date range of the transactions to include in the GL interface entry.
4. Click OK.

   The search will not include any previously exported transactions, regardless of the date. If iMIS finds qualified transactions, iMIS displays a message identifying your GL package.

5. Click Yes.

Credit balances

Within iMIS, any AR item with a credit balance can be processed as a refund. Credit balances originate from event cancellations, billing overpayments, and unidentified payments.

Through a special menu option, iMIS allows you to view, analyze, and print a list of credit items and issue refunds, either for all items or selectively for specific items on the open credit list.

When iMIS issues the refunds, iMIS generates adjusting entries to bring the AR credit balances to zero. Refund checks can then be issued through the third-party AP program. Data entry can be done manually using the iMIS refund report as a basis, or the refund data can be automatically generated if your system is licensed for the iMIS AP interface module.

AP interfaces are available for selected third-party AP packages. The iMIS AP interface streamlines the processing of refunds by supplying the vendor and open-item transaction data for the third-party AP package to use to generate refund checks.

Creating credit invoices

The credit invoices feature identifies and lists all AR items with a current credit balance. It provides the necessary options to select and process credit items for refund.

Before using the credit invoices feature, you must assign a refund clearing account for all appropriate entities on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts). Assign a default account number in the Refund Clearing field. For more information, see System Setup (see "AR/Cash: Set up module").

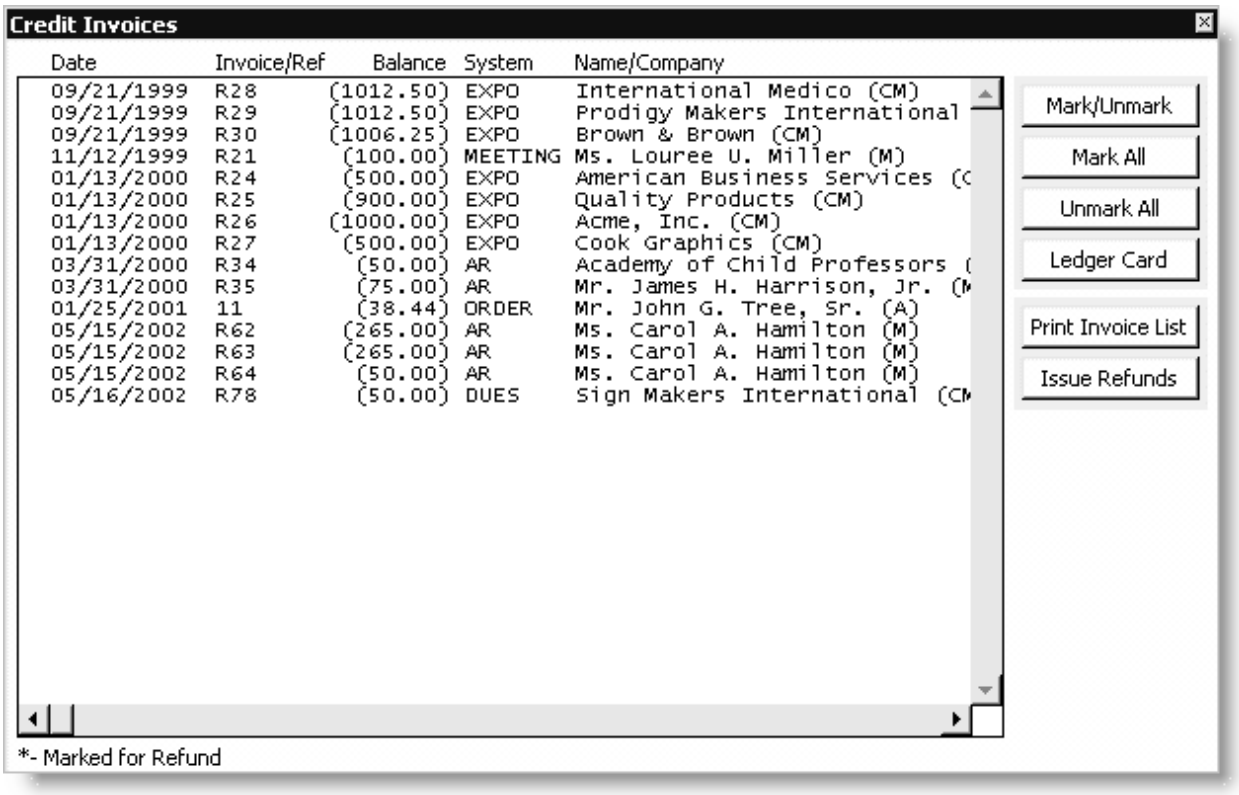
The Refund Clearing account represents a bridge or clearing account between AR and AP. Use the Refund Clearing account for the debit distribution entries in the AP entries in the same manner that you use the clearing account for the credit side of the AR reversal entries.

To create credit invoices (refunds), use the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices). You can use the Credit Invoices window to perform the following tasks:

- View credit items
- Mark credit items for refunds

- Print the list of open invoice credits
- Issue refunds

Credit Invoices window



From AR/Cash, select Process month-end procedures, and click Credit Invoices

Credit Invoices scrolling list

This area contains a list of all credit invoices, including Date, Invoice/Ref, Balance, System, and Name/Company. Each item is labeled with the initial transaction date, invoice or reference number, credit balance, source system, and customer/customer name.

Mark/Unmark button

Select to mark individual items for refund, which is indicated by an asterisk at the far left. The button toggles (turns off or on) the marking of any selected items.

- * = marked
- (no *) = unmarked

Mark All button

Select to mark all items for refund. Click the Mark/Unmark button to individually unmark each item you do not want refunded.

Unmark All button

Select to unmark from all items.

Ledger Card button

Select to view an item's transaction detail or ledger card history on the Transaction Ledger window. To display this detail, double-click on a line item, or click on a line item and click Ledger Card.

Print Invoice List button

Select to print a report of credit items, including initial transaction date, reference or invoice number, source system, general item description, total charges, total credits and resulting (credit) balance, and the customer ID and name.

Issue Refunds button

Select to reverse the balances (for the marked items only) by generating the necessary debit-adjusting entries and print a report documenting the refunds (reversals).

The entries debit the appropriate AR account for the full balance and credit the default refund clearing account.

In a multiple-entity situation, the owner entity for the generated transaction is assigned according to the owning entity of the initial sales-related transaction. iMIS appropriately uses AR from the initial transaction, and uses the refund clearing account from the default tables for the owning entity.

Note: Note: Use the generated report as the basis for the refund items, which should be processed in AP. The refund clearing account should be entered as the AP offset or distribution account, bringing the net effect on the clearing account to zero.

Accounting transactions created when processing refunds

The accounting transactions created in the iMIS Trans table when issuing refunds include the following:

- A credit is made to the Refund Clearing account that has been set up in the AR/Cash Default Accounts table.
- A debit is made to the Accounts Receivable account that has been set up in the AR/Cash Default Accounts table.

These accounting transactions are imported into your third-party GL package at GL interface time.

If you use an AP interface, one export file contains the transactions that are to be imported into your third-party AP package. This file, usually named invoice.txt, may contain one debit transaction to the Refund Clearing account per refund, or it may contain two transactions per refund including a debit transaction to the refund clearing account and a credit transaction to AP. In the scenario where the export file only contains the debit transaction to the refund clearing account, the third-party AP interface automatically creates the credit transaction to AP when the file is imported.

The final refund-processing step is generating refund checks through your third-party AP package, which will create a debit to the AP account and a credit to the cash account. When writing the refund check in your AP package, two transactions are created, including a credit to cash and a debit to AP.

If your system is not licensed for the iMIS AP module, you can enter the data manually by using the iMIS Refund report as a basis. This report is generated when refunds are processed in iMIS. You should use the refund clearing account as the AP offset or distribution account, bringing the net effect of the clearing account to zero.

Implementing mass write-off of debit/credit balances

The AR/Cash module allows you to perform a mass write-off of debit/credit balances based on a user-defined cutoff date and a maximum dollar amount.

The system setup options for this feature include an AR/Cash Set up module option that allows you to define the maximum default dollar amount to write off. During the write-off process, all debit or credit balances less than or equal to this amount are written off. You can overwrite this default during the actual write-off process.

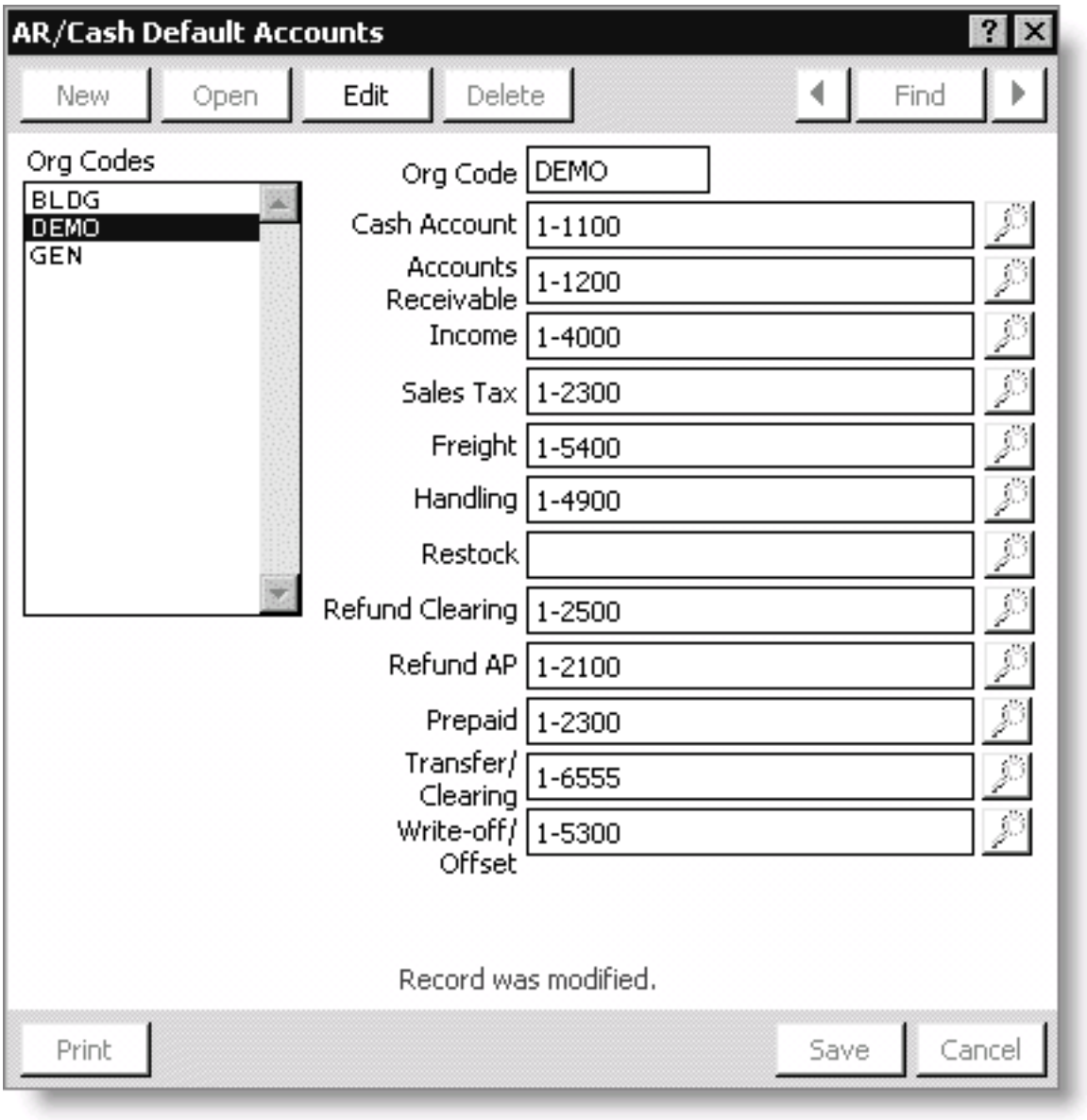
A default GL account number, entered on the AR/Cash Default Accounts window, that offsets the credit or debit created by the write-off process will be written. For example, if you write off credit balances, iMIS creates a debit to the default AR account and a credit to the write-off offset account specified on the AR/Cash Default Accounts window.

To set the default write-off amount

1. From AR/Cash, select Set up module to open the Set up module window.
2. Click Edit.
3. Enter a default dollar amount in the Default Cut Off Amount for Write-offs field.
4. Click Save.

To enter the default write-off offset account

1. From AR/Cash, select Set up module to open the Set up module window.
2. Click Default Accounts to open the AR/Cash Default Accounts window.
3. Click Edit.
4. Enter the GL account number to which you will be recording the write-offs in the Write-off/Offset field.
5. Click Save.



AR/Cash Default Accounts window

To process mass write-offs

1. From AR/Cash, select Process month-end procedures, and click Credit/Debit Write-Offs to open the Credit/Debit Invoices Write-Off window.

   Note: The Cutoff Date field defaults to the system date and the Amount field defaults to the amount specified on the AR/Cash Set up module window. You can overwrite either or both of these fields as needed. iMIS writes off all debit or credit balances where the

INVOICE_DATE is equal to or older than the date specified in the Cutoff Date field and the balance is equal to or less than the amount specified in the Amount field.

2. Enable Debit or Credit and click Load List. A list of all records that meet the Cutoff Date and Amount criteria are displayed. Select these records for write-off by:

- Selecting an individual record by selecting the item and clicking Mark/Unmark.
- Selecting all records by clicking Mark All.

3. If you need to view the detail for an item, select the item and click Ledger Card. The Transaction Ledger window displays the balance details.
4. Print a list of all displayed items by clicking Print Invoice List for an audit report before processing the actual write-offs.
5. After you verify that the records selected for write-off are correct, click Write Off on the window to process the actual write-offs.
6. You can view the results of the write-off on the customer's Transaction Ledger window. From Customers, select Manage Customers to open the Manage customers window.
7. Click Find.
8. Enter the ID for the customer who had the write-off applied to their account.
9. Select the AR/Cash tab to view the accounts receivable information.
10. Double-click the line item that was written off to open the Transaction Ledger window.
11. Verify that the write-off has been recorded, and click OK.

AR/Cash: Set up module

Configuring the AR/Cash module includes setting up the following options:

- Basic AR/Cash options
- Default accounts
- Aging

- Batch Control
- G/L Interface
- Credit Card Authorization
- Advanced PCI Compliance
- (VAT only) Taxation methods

Financial entities

Before you configure several of the AR/Cash module features, you must define one or more financial entities in the iMIS system setup. Entities are also known as organizations, or in the case of fundraising financial entities, funds.

> **Note:** Note: A fund is an organization or entity that serves as an asset account for fundraising activities. If the entity currently being defined represents a Fund to which Fundraising gifts and pledges may apply, select the Is Fund checkbox in the Organization Names window.

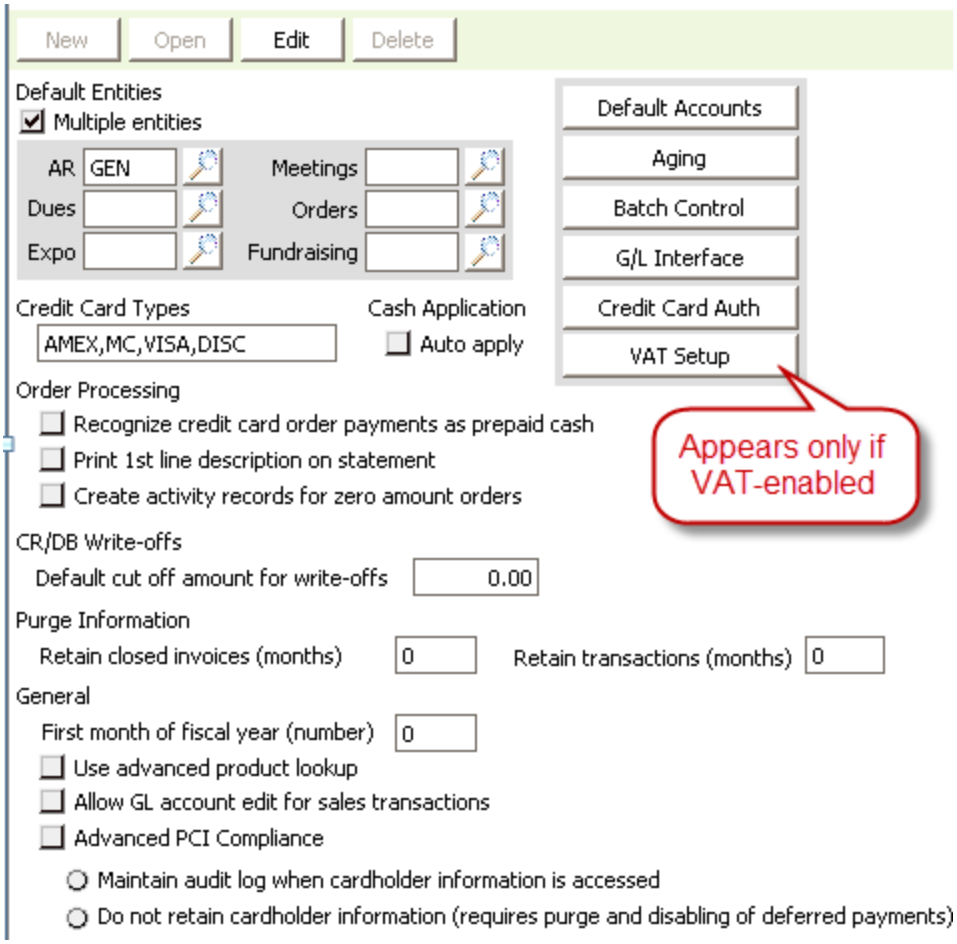
See the System Setup section for help with "Defining an organizational entity".

Setting basic AR options

Use the Setup module window to define high-level options such as:

- Default entities
- Credit card types
- Cash application information
- Order processing information
- Credit/debit write-offs
- Purge guidelines

Configure accounting options window



Admin Console: Accounting > Options > Configure accounting options
Desktop: AR/Cash > Set up module

Default Entities

- Multiple Entities - For most organizations, this option should be disabled. When enabled, iMIS separates and processes transactions for multiple financial entities that share a common customer database, and the following fields designate the default entities for their modules:
- AR - entity code for iMIS AR/Cash
- Meetings - entity code for iMIS Events
- Dues - entity code for iMIS Billing

- Orders - entity code for iMIS Orders
- Expo - entity code for iMIS Exposition Management
- Fundraising - entity code for iMIS Fundraising

Credit Card Types

- Designates a comma-delimited list of acronyms (which iMIS stores as uppercase) for credit cards you accept. Common acronyms include Master Card (MC), Visa (VISA), Discovery (DISC), and American Express (AMEX). If you use iMIS authorized forms, such as preprinted invoices that contain a credit card payment box, this list is printed in that box, which allows the customer to see the available credit choices.

  Note: This does not provide credit card validation or credit card processing within iMIS. See Credit Card Authorization for setup details.

Cash Application

- Auto apply - When enabled, incoming cash receipts are automatically applied to invoices beginning with the oldest outstanding balance on an individual's record. This setting can be overridden when entering cash receipts.

  Tip: If you have heavy transaction volumes, do not enable Cash Application Auto apply.

  Note: Auto apply only affects the functionality of the Enter and edit cash receipts window and AR Importer; if Auto apply is disabled, payment records in AR Importer files must contain the invoice number.

Related windows

- Default Accounts opens the AR/Cash Default Accounts window.
- Aging opens the AR/Cash Aging window.
- Batch Control opens the AR/Cash Batch Control window.
- G/L Interface opens the AR/Cash General Ledger Interface window.

- Credit Card Auth opens the AR/Cash Credit Card Authorization window. (Enabled only if your system is licensed for CCAUTH.)

  Order Processing

- Recognize credit card order payments as prepaid cash - When enabled, iMIS allows the credit card payment to be handled in the same manner as a cash payment and immediately record the payment into the batch, with an immediate debit to Cash and credit to the Prepaid account. When disabled, iMIS follows standard accounting practices and does not recognize cash for credit card payments until an order is shipped.

  Note: Credit card payments on orders placed in Orders and Service Central are always recognized as prepaid cash regardless of whether Recognize credit card order payments as prepaid cash is enabled.

- Print 1st line desc. on statement - When enabled, the first line of an order or a user comment appears in the AR/Cash tab on the Manage customers window and on the Enter and edit cash receipts window, and it prints on AR Statements. When disabled, only the order number appears.

- Create activity records for zero dollar orders - When enabled, activity records are created for orders that are no-charge orders.

  CR/DB Write-offs

- Default cut off amount for write-offs - Sets the maximum default amount to be written off. During the write-off process, all debit or credit balances less than or equal to this amount are written off. This value can be overridden during the actual write-off process.

  Purge Information

- Retain closed invoices (months) and Retain transactions (months) - Designates how long records can be viewed in iMIS after being closed. Set up your organization's overall purging parameters (months) for the AR/Cash module's housekeeping function.

Tip: Set both retention periods to the same number of months, which lets you view Ledger Card transaction detail for matching invoice summary lines on the AR/Cash tab on the Manage customers window.

General

- First month of fiscal year (number) - Designates the first month of your organization's fiscal year. Some GL interface choices will export the fiscal period along with the calendar transaction date of the transactions.

  Note: Annual dues uses this field to determine the Effective Date on the Process billing window.

- Use advanced product lookup - When enabled, enables users to use the Lookup icon to find products when entering and editing AR/Cash sales transactions.
- Allow GL account edit for sales transactions - When enabled, allows editing of the GL Account field for each product selected during sales, credit memo, and debit memo transactions. When disabled, the GL Account field cannot be edited on the Enter and edit sales transactions, Enter and edit credit memos, and Enter and edit debit memos windows.
- Advanced PCI Compliance - Enables iMIS-wide enforcement of the PCI Compliance support (see "Implementing Advanced PCI Compliance options") option that you choose:
- Maintain audit when cardholder information accessed - Directs iMIS to save encrypted cardholder data and to log every system event in which card information is accessed. The log is kept in the PciAuditLog table (see "Reading the PciAuditLog table").
- Do not retain cardholder information - Directs iMIS to save transactions without storing any cardholder data and to show only gateway reference numbers and authorization codes in windows and reports.

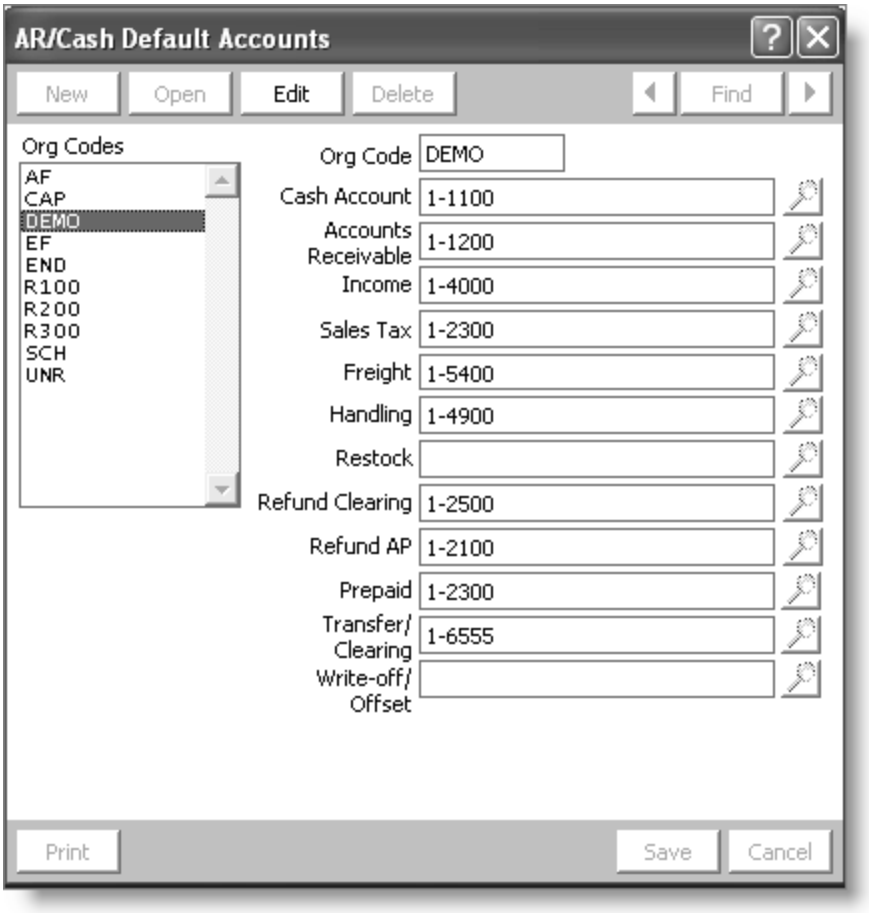
  Caution! To use this option, you must purge existing cardholder data from your database and disable all deferred payment processing in iMIS. See "Implementing Advanced PCI Compliance options".

Defining default general ledger accounts

Default general ledger accounts assign specific account numbers to an entity. They let you:

- Send data to a third-party GL software package using the iMIS GL Interface
- Track and report on accounting transactions accurately
- Perform DueTo/DueFrom processing when needed

Default Accounts window



From AR/Cash, select Set up module, and click Default Accounts

Org Codes

The Org Codes listed are set up in the Organization Names window using the iMIS system setup menu. The selected organization is displayed in the Org Code field.

Cash Account

(Required unless you are using batch control) If you are using batch control, all cash account codes are set by the Cash Account table entry for that batch.

This account is used for all iMIS cash-related transactions unless batch control is enabled or a credit card override account is specified. Multiple cash accounts can be defined and used at the batch control level.

Accounts Receivable

(required) This is the only place you can enter the main AR account code.

This is the main account that iMIS uses whenever full payment is not received for any order (for example, sales item or event registration). You can only have one Accounts Receivable account per organization.

Income

(Required if a specific income account is not supplied at the product level) iMIS uses this default income account only for those transactions where an income account is not specified at the product level.

Sales Tax

(Required if any account codes are not supplied at the tax authority level) iMIS uses this default sales tax account only for those transactions where a sales tax account is not specified at the product level.

Freight

(required) Enter an account code for the freight charges associated with orders.

Handling

(required) Enter an account code for the handling charges associated with orders.

Restock

Enter an account code for the charges associated with restocking returned orders.

Refund Clearing

This default account is the offsetting account that iMIS uses when it clears credit balances marked for refunds. Refund processing is performed on the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices). For more information, see Creating Credit Invoices.

This account also serves as a suspense (or bridge) account between AR and AP.

Each time iMIS generates a refund, accounts receivable is debited (to clear the credit balance) and the refund clearing account is credited. This credit balance is debited and cleared only when you enter the parallel account payable (AP) entry.

Refund AP

(Required only if you are licensed for the iMIS AP interface and you are importing into your third-party accounts payable software) This account is the accounts payable control account for the AP interface.

Prepaid

iMIS uses this account when a prepaid order is initially entered. The Cash account is debited and the Prepaid account is credited. When the order is invoiced, iMIS clears the prepaid amount and credits (transfers to) the appropriate income account.

This is a required account that is used in conjunction with prepaid order processing (simple or full order entry). The prepaid account is typically a deferred income balance sheet account.

Note: Note: Non-credit card cash order prepayments will involve the prepaid account, because check and currency receipts are immediately recognized upon order entry. Credit card payments will also use the Prepaid account if the Recognize Credit Card Order Payments as Prepaid Cash option is enabled (from AR/Cash, select Set up module). Otherwise, credit card payments are recognized when the order is invoiced.

Transfer/Clearing

This account is reserved for transaction generation where forced balancing is required.

iMIS uses the Transfer/Clearing account for two different system processes:

- Used in conjunction with prepaid order processing (simple and full order entry). It is used as a clearing account in the process to transfer the prepayment offset from prepaid (deferred income) to income.
- Used in the GL interface procedure for certain GL package choices. It is used when GL journal entries are generated and a restricted number of transaction lines are mandated.

> **Note:** Note: When the Transfer/Clearing account is used in a line item within a transaction, there will always be an offsetting line item(s) in an associated transaction to ensure that entries to the transfer account will always balance to zero.

Write-off/Offset

This is the GL account to which the offset credit or debit created by the credit/debit write-off process (from AR/Cash, select Process month-end procedures, and click Credit/Debit Write-Offs) will be written.

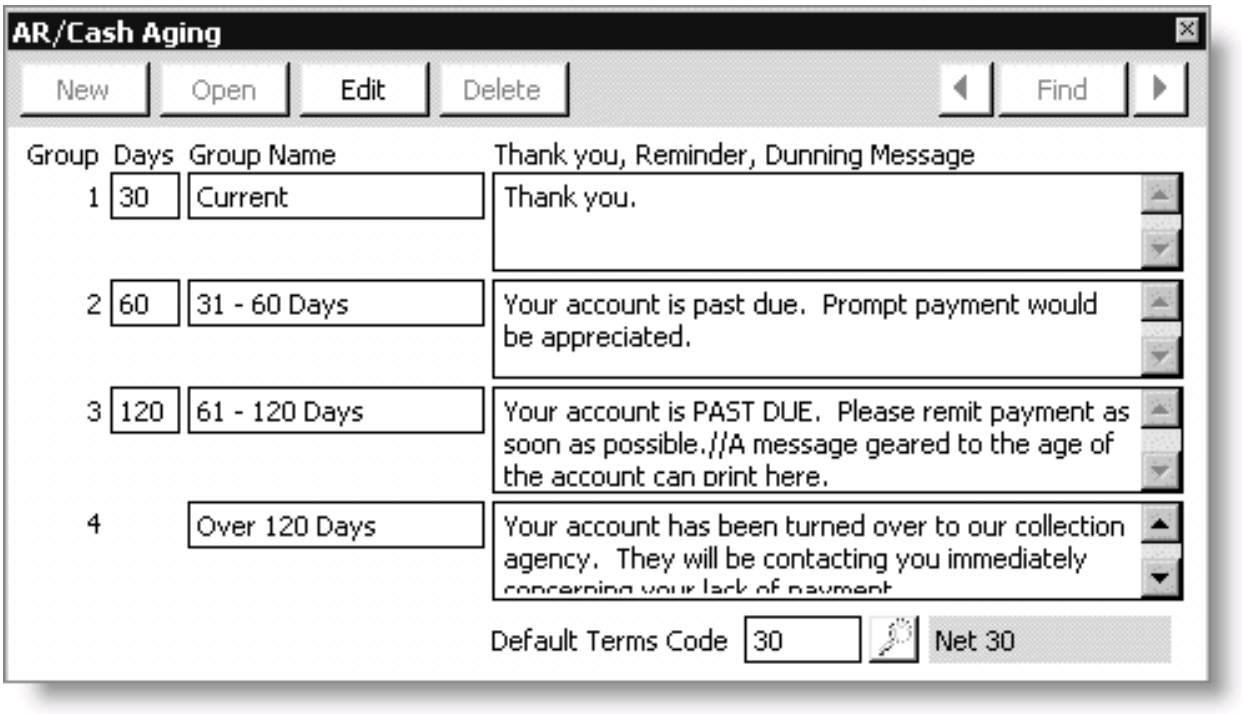
To assign AR/Cash default accounts codes

1. From AR/Cash, select Set up module to open the Set up module window.
2. Click Default Accounts to open the AR/Cash Default Accounts window.
3. From Org Codes, choose an organizational code.
4. Click Edit.
5. Enter the account number (or click the lookup icon to select a value) in each field.
6. Click Save.

Defining aging groups

You must define the guidelines for determining the aging groups to use for statements, aged trial balances, and account inquiries. Aging is the length of time an amount is past due for payment on an invoice.

Aging window



From AR/Cash, select Set up module, and click Aging

Group

Four groups define the guidelines for determining the Aging Groups to use for statements, aging trial balances, and account inquiries.

Days

The number of days indicates how many days old the invoice can be before the invoice moves out of this particular age group. When the invoice passes this age group by one day, the system automatically moves the invoice to the next age group.

Group Name

Enter a short name for each age group that names the group for all statements, aged trial balances, and account inquiries.

Thank you, Reminder, Dunning Message

If you would like a message to appear on statements when an account reaches a certain age, enter the message next to the appropriate age group. You can have different messages print for different ages.

> **Note:** Note: Currently, aging is based on the date of the invoice, not on a due date calculated from payment terms.

Default Terms Code

The Default Terms Code applies to all levels of order entry. Enter the code of the terms you defined on the Set up terms window (from AR/Cash, select Set up tables > Terms) that you want to use by default, or use the lookup icon to select a value. For example, a default term code of 30 would represent Net 30 days.

> **Note:** Note: You must populate the Default Terms Code field in order for Events functions to show for people to register for events on the Public view.

To define aging groups

1. From AR/Cash, select Set up module to open the Set up module window.
2. Click Aging to open the AR/Cash Aging window.
3. Click Edit.
4. Enter the aging information.
5. Click Save.

Setting up batch control

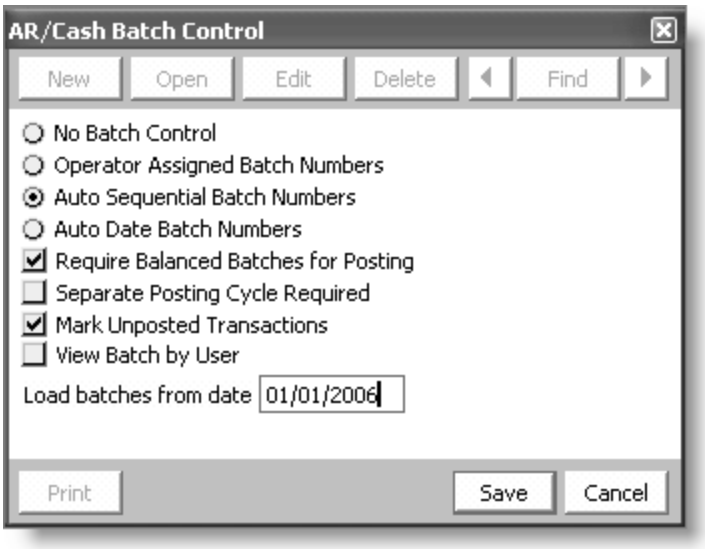
Setting up batch control consists of enabling batch control, configuring numbering and viewing options, and setting up cash accounts. These steps are required even if you only

have one account.

> **Note:** Note: AR Importer batches are auto-created and auto-numbered and do not recognize specific iMIS users. These batches are assigned to the “Manager” user in iMIS, and require a security level of 8 to view, edit, or delete transactions when the View Batch by User option is selected.

AR/Cash Batch Control window

This window specifies whether batch control is enabled, and if it is, the options that apply to batches throughout iMIS.



From AR/Cash, select Set up module and click Batch Control.

Batch control

The following options govern batch control in iMIS:

No Batch Control - Specifies that no batch control is used. This is a good option for simple or low-volume systems.

Operator Assigned Batch Numbers - Specifies that batch control is used and that data-entry operators can create their own batch numbers when needed. The batch number may be a combination of up to 15 alphanumeric characters.

Auto Sequential Batch Numbers - Specifies that batch control is used and that iMIS automatically assigns batch numbers to new batches using a sequential numbering system.

Auto Date Batch Numbers - Specifies that batch control is used and that iMIS automatically assigns batch numbers to new batches using a date-oriented technique. Multiple batches created on the same date are distinguished from each other with a sequential suffix attached to each new batch generated in a day. For example, 020515-1, 020515-2, and so forth.

> **Note:** Note: The following options are not displayed unless you enabled batch control by selecting one of the batch numbering options (Operator Assigned Batch Numbers, Auto Sequential Batch Numbers, or Auto Date Batch Numbers).

Require Balanced Batches for Posting

(Recommended) Specifies that unbalanced batches cannot be posted. For this option, iMIS considers a batch balanced when the following statements are true:

- The control amount is equal to the actual amount.
- The control count is equal to the actual count.

If either or both of the following statements are false, iMIS displays an error message, and does not post the batch.

> **Note:** Note: Hot posting (the default) reports transactions immediately.

Separate Posting Cycle Required

Specifies that transactions are not hot posted. Most users should not enable this option, because it prevents iMIS from automatically posting and updating accounting events to AR/Cash. Instead, transactions are posted only when the batch is posted.

Only in very high volume situations should you consider giving up the hot posting convenience, which saves processing time and speeds data entry.

> **Note:** Note: This option is not compatible with Service Central.

Mark Unposted Transactions

When selected, unposted transactions are preceded by (U) in the Description field on the Transaction Ledger window and line items with unposted transactions in the AR/Cash tab are preceded by (U).

> **Note:** Note: If the Separate Posting Cycle Required option is enabled, transactions are not displayed in the Transaction Ledger window until the batch is posted, so no transactions will be preceded by (U) if the Separate Posting Cycle Required option is enabled.

View Batch by User

Hides batches created by others from users whose authorization level for AR/Cash is less than 8. When this option is not selected, displays batches created by others. Hidden batches include the following batches:

- Accrual billing batches
- Orders with the Create New Batch for Invoicing option enabled
- AVAIL_CREDIT batches
- Importer batches (Billing, AR/Cash, Orders)

Load batches from date

Specifies a default date that is used to filter batches displayed in the Manage batches window. Users can override this filter.

To set up Batch Control

1. From AR/Cash, select Set up module (see "Set up module window for AR/Cash").
2. Click Batch Control to open the AR/Cash Batch Control window.
3. Click Edit.

4. Select a batch control numbering option. The Auto Sequential Batch Numbers option or the Auto Date Batch Numbers option is recommended.
5. (Recommended) Select the Require Balanced Batches for Posting option to require that the control amount equals the actual amount, and the control count equals the actual count, before posting.
6. (optional) Select the Separate Posting Cycle Required checkbox.

   Note: This option is incompatible with Service Central.
7. (optional) Select the Mark Unposted Transactions (see "About marking unposted transactions") checkbox.
8. (optional) Select the View Batch by User (see "Limits on editing and deleting transactions") checkbox.
9. Click Save.
10. From AR/Cash, select Set up tables > Cash accounts to open the Set up cash accounts window.
11. Make an entry for all cash accounts (see "Setting up cash accounts") on the Cash Account window.
12. Click Save.

Limits on editing and deleting transactions

When the View Batch by User checkbox is selected, users can only edit or delete transactions contained in unposted batches that they create. If users attempt to edit or delete a transaction that was created by another user, a message instructs them to select a different transaction.

About marking unposted transactions

You must enable a batch control option and select the Mark Unposted Transactions checkbox on the AR/Cash Batch Control window before transactions can be marked as unposted.

If the Separate Posting Cycle Required option is enabled, unposted transactions will not be displayed in the Transaction Ledger window.

The AR/Cash tab on the Manage customers window shows the summary of an invoice. The summary of the invoice and its related transactions (payments and adjustments) displayed on the AR/Cash tab will be marked with (U) and unmarked as the transactions are created and posted. The Transaction Ledger window shows the detail lines of the invoice. Each of these lines is marked (U) while unposted and then unmarked when posted, and is unaffected by other transaction records.

An invoice will be visually marked as unposted with (U) if there is at least one transaction record linked to that invoice (a payment or an adjustment to that invoice) that meets all three of the following requirements:

- The transaction is linked to a batch.
- The batch has not been closed or posted (the batch has a status of Open or Ready on the Manage batches window).
- The transaction has not been exported through the General Ledger.

> **Note:** Note: Only future transactions are marked as unposted after the Mark Unposted Transactions option is selected.

> **Note:** Note: If the Separate Posting Cycle Required option is enabled, unposted transactions will not show up in the Transaction Ledger window.

Examples of unposted transactions

The following is an example of how transactions are marked unposted.

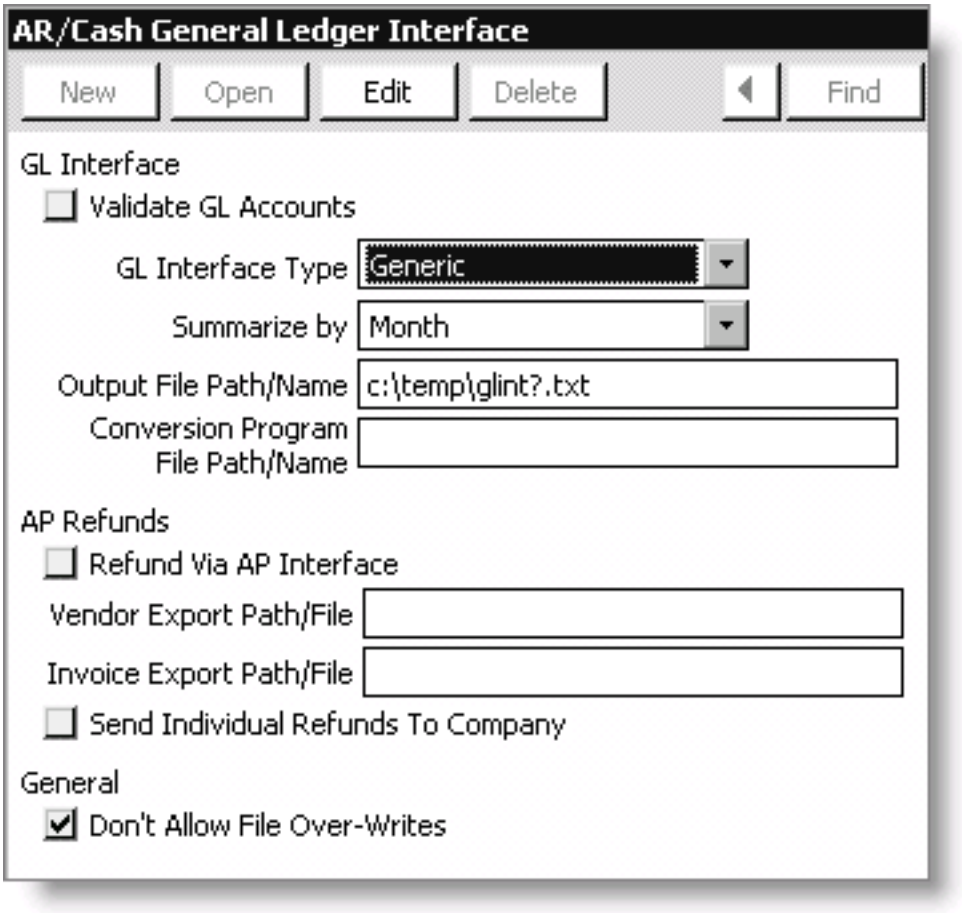
1. Create an invoice for a customer with batch control enabled.
2. View the customer's AR/Cash tab. There is a (U) displayed to the left of the reference number for the unposted transaction.
3. View the customer's Transaction Ledger window for this transaction.
4. Post the batch.

5. View the customer's AR/Cash tab. There is no longer a (U) mark to the left of the reference number for the transaction.
6. View the customer's Transaction Ledger window for this transaction. After the batch is posted, the (U) is removed from the descriptions for transaction number 99.
7. Enter a payment against this invoice in a separate batch.
8. View the customer's AR/Cash tab. There is a (U) to the left of the reference number for the line item with the unposted transaction.
9. View the customer's Transaction Ledger window. Notice that only the AR line for the payment is marked (U), and that the original invoice lines are not marked (U).
10. Post the batch.
11. View the customer's AR/Cash tab. There is no longer a (U) mark next to the reference number for the transaction.
12. View the customer's Transaction Ledger window. Notice that the original invoice and the payment are no longer marked with a (U).

Configuring the general ledger interface

The AR/Cash General Ledger Interface window is used to validate general ledger accounts, configure the general ledger interface type, and configure how refunds for the accounts payable are exported.

General Ledger Interface window



From AR/Cash, select Set up module, and click G/L Interface

GL Interface

Validate GL Accounts - Enable the Validate GL Accounts option if you intend to maintain GL accounting details with true GL account numbers instead of iMIS-generated account numbers and require that the system verify that GL accounts entered throughout the system exist on the GL Accounts table. To integrate iMIS-generated transactions with an outside GL package, you must maintain true GL accounts.

iMIS can validate account numbers entered on the AR/Cash Default Accounts window and in all product code and related tables throughout iMIS.

> **Note:** Note: To define valid GL accounts, build a table (called GL_ACCOUNT) to include all available account numbers on the Set up general lookup/validation window.

> **Note:** Note: The Import button on the Set up general lookup/validation window lets you import your chart of accounts from your third-party GL package.

GL Interface Type - Select a third-party GL software option from this drop-down list. All current third-party GL software options are included on this drop-down list. Select the None option if you are not planning to use a third-party GL software package.

Summarize by - Select one of the following options from this drop-down list to determine the level of summary applied in the creation of the GL interface entries:

- Month – Summarizes all transactions for the entire month (or the date range requested in Create GL Journal, if less than a month) on a per GL account/pseudo-account basis. These entries are posted into a single journal entry in the GL Interface.
- Day - Within the requested date range, this posts a journal entry for each day that contains individual entries summarized per date per GL account/pseudo-account.
- Batch – Within the requested date range, this posts a journal entry for each batch that contains the batch number and a summary on a per GL account/pseudo-account basis.
- Detail – Within the requested date range, this posts a journal entry for each date, but summarizes only the Accounts Receivable entry. Although iMIS supports full detail, export and import procedures can be time consuming. You can produce detail transaction reports directly in iMIS to support more summarized entries.

Output File Path/Name - Designating an Output File Path/Name allows the iMIS interface to automatically create an output file with this path and file name. See Using special characters in file path/name for information on using special characters in the file path/name.

If the Output File Path/Name field is left blank, the system prompts you to provide a valid path and file name when the interface is run. If you do not specify the path and file type for

the export file in this field, you can only specify an Omnis print file with a .prn extension when the interface is run.

> **Note:** Note: iMIS creates the export file and flags the included transactions (so that these transactions are skipped in future interface operations).

If the Output File Path/Name entered is not correct (for example, the referenced directory does not exist), an error message will display and the export is aborted.

Conversion Program File Path/Name - This field specifies the conversion program that will be executed for any GL interface type that begins with generic (not case-sensitive). This field is only displayed for GL interface types that begin with generic.

AP Refunds

- Refund Via AP Interface - Enable this option if you want the iMIS AP interface to process refunds.
- Vendor Export Path/File - Contains the file/pathname for the vendor export file.
- Invoice Export Path/File - Contains the file/pathname for the invoice export file.
- Send Individual Refunds to Company (applies only to refunds) - Enable this option if you want the refund checks that are issued for a non-company member to be issued in the name of the company rather than the individual (even when the Bill To ID is the individual).

  Note: (Solomon only) With this option enabled, the individual's name will be placed into the contact name field of the created Solomon vendor record. However, the Solomon vendor name will be set to the iMIS company name, and the refund invoice will therefore be created payable to the company's name, not the individual. If this option is not selected (disabled), the vendor name for the refund in Solomon will be set to the individual's name and the individual will receive the payment. This option has no impact on the processing or refunds for Bill To IDs where the member type is a company, in which case the vendor name is populated with the company name.

General

Don't Allow File Over-Writes - Enable to prevent iMIS from running the next GL interface and creating duplicate files and file names. Enabling this option also protects your export files from being accidentally overwritten if you have not imported the data into your third-party GL package before the next exports are produced. This option is needed only if you designate fixed file names (export.asc). However, if your third-party GL package prompts you for or allows for a unique import path/file name at run time, use the ? symbol to archive exported files and prevent overwrites.

Using special characters in file path/name

Use two special characters, question mark (?) and number sign (#), in designated file names to have iMIS generate incremental and entity-specific file names when it creates export files.

Question mark symbol

Use the ? symbol to create file names that iMIS increments sequentially at each export. This value is stored in Counter.LAST_VALUE for Counter_name='GL Interface' and will continue to increment indefinitely.

For example, glint?.txt produces glint1.txt, glint2.txt, and so forth.

Number sign symbol

If you are using multiple entities and need separate export/import files generated for each entity, then use the substitution character # to insert the entity code into the generated file names.

For example, if you are exporting data for an entity called NFP (not-for-profit) and the file name designation is #glint.txt, the export file NFPglint.txt will be generated containing only the transactions that belong to the NFP entity.

The new data is not appended to the NFPglint.txt file each time you export data for this entity. The NFPglint.txt file is overwritten, unless you enable the Don't Allow File Over-Writes option in the General Ledger Interface window.

? and #

These special characters can be combined in a single file name.

For example, #glint?.txt produces NFP export files NFPglint1.txt, NFPglint2.txt, and so on.

> **Note:** Note: There are no character limitations in iMIS for the file name. However, you should verify any limitations that may be imposed by your third-party GL package.

To configure the GL interface

> **Note:** Note: These options apply only if you have purchased a license for the iMIS Financial Systems interface or AP interface.

The AR/Cash General Ledger Interface window lets you configure the iMIS GL and AP interfaces, which both require a license.

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. Select a general ledger accounting package from the GL Interface Type drop-down list.
4. Select a level of transaction detail from the Summarize by drop-down list.
5. Enter the file path and file name.
6. Enable the Refund Via AP Interface, Send Individual Refunds to Company, and Don't Allow File Over-Writes options if desired.
7. Click Save.

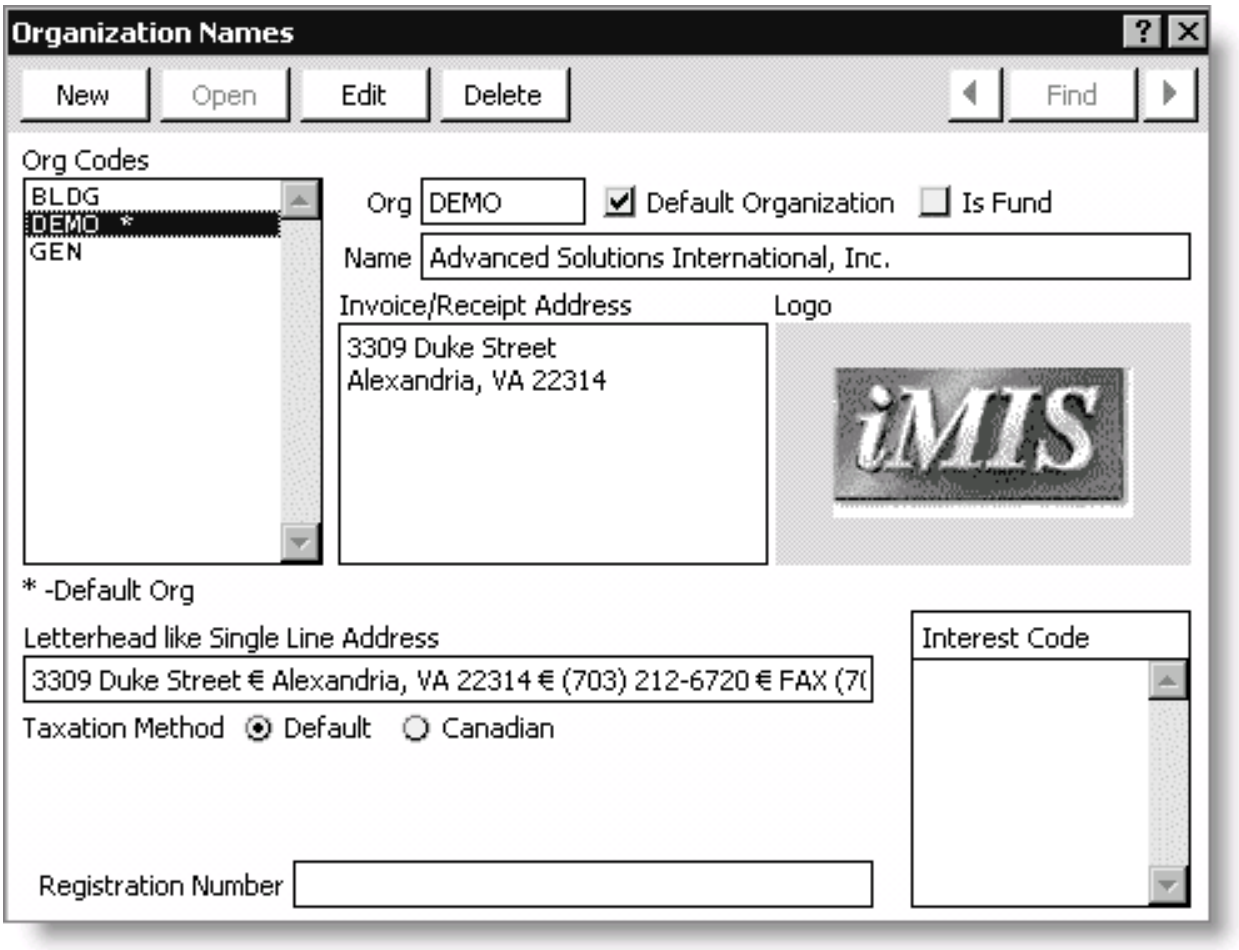
   To create separate GL interface files

   iMIS can segregate transactions by entity and generate separate GL export/import files for each entity. To activate this option, place a pound sign (#) at the desired location in the file name of the transaction export path/file on the AR/Cash General Ledger Interface window. The pound sign (#) symbol sends a signal to iMIS to create separate output files. To

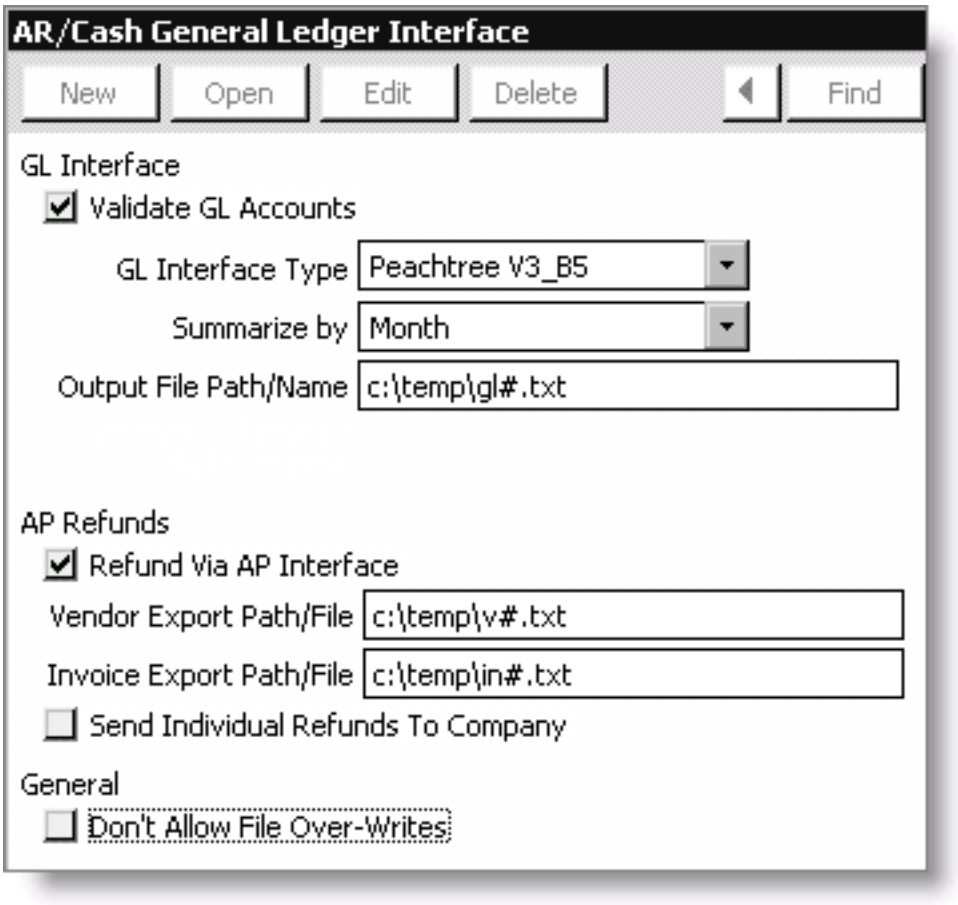
properly distinguish the files, iMIS substitutes the entity organization code in place of the pound sign (#).

> **Note:** Note: In order to limit file names to eight characters, it is important to keep other identifying characters in the file name to a minimum. When assigning entity Org Codes, try to limit the character size of the entity Org Codes also.

On the following Organization Names and AR/Cash General Ledger Interface windows, each time the GL entry is generated, three files will be created in which the organization codes BLDG, DEMO, and GEN, respectively, will be substituted for the pound sign (#) symbol (assuming transactions are interfaced for all three entities). When the processing is complete, GLBLDG.TXT, GLDEMO.TXT, and GLGEN.TXT will reside in the TMP directory.



Select File> System Setup, and click Organization Names



From AR/Cash, select Set up module, and click G/L Interface

Implementing Advanced PCI Compliance options

Implementing Advanced PCI Compliance options in iMIS is only one small part of your organization's journey. Completing the questionnaire is your first step toward certification: you then arrange for an Authorized Scanning Vendor to test each of your e-commerce IP addresses for security flaws, and after that you apply for certification. It can cost about $100 for scanning of one IP address and help in submitting the questionnaire.

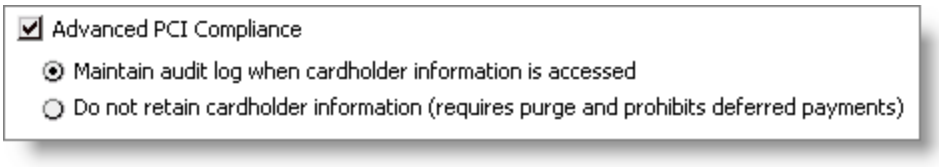
The Payment Card Industry Self Assessment Questionnaire lets your organization determine if you meet mandated security levels for handling credit card transactions. The bulk of the questionnaire deals with firewalls and with clerical and network procedures. It focuses on the effects of software such as Microsoft Windows and SQL Server, as well as

network authorizations and security. It does not apply to the vendors of the software you use, but the design of the software can affect what you must do to stay in compliance. Be sure to follow our guidelines for how to implement iMIS for optimal security.

> **Note:** Note: There are a number of versions of the Questionnaire. Customers that maintain the audit log (option 1, below), must use version SAQ-D. However, if you do not retain cardholder information (option 2) and if you meet other security requirements, including segmenting iMIS from less secure systems, you may be able to use the much shorter SAQ-C. Note that iMIS version 15.1.2 was validated as meeting PCI requirements and is listed on the PCI web site as such.

To set up Advanced PCI Compliance support

1. In iMIS Desktop, open AR/Cash > System Setup.
2. Select Edit.
3. Under General, check Advanced PCI Compliance. Two options appear to specify which method to apply.



Caution! If you bypass these options by putting payment card data into user-defined tables or by using custom encryption methods, you are responsible for PCI Compliance in the handling of that data.

4. Choose between the first and second options and click Save.

Maintain audit log when cardholder information is accessed

This option causes iMIS to perform audit logging each time a user accesses any card-holder information; no log entries exist for access that occurs before the option is enabled or after it is subsequently is disabled. It also logs attempts to access this information by outside processes, such as SQL scripts.

Do not retain cardholder information

This option prevents iMIS from storing any cardholder data. To use this option, you have to disable all CCAuth accounts configured for deferred authorization (or have all related Cash Accounts removed); if you need to support deferred payment card processing, you must use the other option.

Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

5. If you chose the second option, open DB Maintenance (Start > ASI > iMIS > Tools > iMIS DB Maintenance) and complete the database preparation steps for your option on the PCI tab, below.

   DB Maintenance: PCI tab

   Depending on which option you choose in AR/Cash Setup, implementing advanced PCI Compliance support requires changes to your iMIS database, either by

- removing all existing cardholder information from your iMIS system that predates your new security measures, or
- resetting the encryption keys (including removal of previous keys) and re-encrypting cardholder data each year, as required

  DB Maintenance lets you complete these processes easily and reliably through the PCI tab.

  Precautions for using DB Maintenance

- Verify that you have a valid backup of your iMIS database before running DB Maintenance commands that modify the database.
- Ensure the database is protected from updates before modifying it, to prevent failures and data problems from changes occurring while entities are being reset/rebuilt/removed:

1. Have all users log out.
2. Stop webservers from updating the database, such as by stopping the AppPool in IIS.

- While users are logged in, you can safely run Analyze Database and Table Details; however, analyzing the database can affect performance.

  To reset encryption keys and data

  To maintain PCI compliance with stored cardholder data, you must complete all of the steps below.

1. Choose a time when the database can be offline for several hours. Re-encryption can take minutes or hours, depending on your data; once started, it must not be stopped.
2. In DB Maintenance, open the PCI tab.
3. To start the purge, click Reset Encryption Key and Data.

   A warning prompts you to confirm the process.
4. Allow the process to complete without interruption.

   Caution! You risk data corruption if you interrupt the process or close DB Maintenance, which appears unresponsive.

   The output of the process displays in the main window of the utility.
5. Click Remove Historical Encryption Keys, or, if postponing that purge, skip to the next step. (If you do the purge later, be sure to recycle the application pool then, too.)

   Caution! Once you remove previous keys, clicking on any encrypted links that have already been embedded in emails (such as "create new account" emails) will no longer work. The user will see the error "Your session has timed out. Please try your operation again".
6. Recycle the IIS Application Pool (iMISApp AppPool) for each application server that uses this database.

   To purge cardholder data

> **Note:** Important: If you implement PCI Compliance with audit logging and later switch to storing no data, be aware that this purge routine leaves the existing audit log (PciAuditLog table) intact.

Deferred transactions are lost in a purge, so you need to resolve deferred data and disable settings that allow it.

1. Find and change any gateway that is configured for Deferred Authorization:

- In Desktop, open AR/Cash > Set up module and select Credit Card Auth.
- Under Current Accounts, select the first gateway listed.
- If it is set to Deferred Authorization, change it to Immediate or Manual Authorization.
- Repeat for all other gateways.

2. Submit any deferred transactions that are pending: In Desktop, open AR/Cash > Credit card reporting and run Print Deferred Pre-authorization Report and Submit Deferred Authorizations.

   Any deferred transaction remaining after the purge has no payment information, so it must be re-entered manually.

3. In DB Maintenance, open the PCI tab.
4. To start the purge, click Purge All Cardholder Information.

   A query runs and the Purge Payment Card Information window opens, reporting the number of records with cardholder information in each table that will be cleared by the purge.

5. If the report surfaces no problems and you want to complete the purge, select Continue with Purge to clear the cardholder information from the database.

   The output of the process displays in the main window of the utility.

   Fields affected by the purge

   Table: [dbo].[ASI_temp_trans] if exists

- [CC_NUMBER] - masked (shows last 4)
- [CC_EXPIRE] - masked
- [CC_NAME] - cleared

Table: [dbo].[Trans]

- [CC_NUMBER] - masked (shows last 4)
- [CC_EXPIRE] - masked
- [CC_NAME] - cleared
- [ENCRYPT_CC_NUMBER] - cleared
- [ENCRYPT_CC_EXPIRE] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Table: [dbo].[Orders]

- [PAY_NUMBER] - masked (shows last 4)
- [CREDIT_CARD_EXPIRES] - masked
- [CREDIT_CARD_NAME] - cleared
- [ENCRYPT_PAY_NUMBER] - cleared
- [ENCRYPT_CREDIT_CARD_EXPIRES] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Table: [dbo].[Basket_Payment]

- [PAY_NUMBER] - masked (shows last 4)
- [CREDIT_CARD_EXPIRES] - masked
- [CREDIT_CARD_NAME] - cleared
- [ENCRYPT_CREDIT_CARD_EXPIRES] - cleared
- [ENCRYPT_PAY_NUMBER] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Table: [dbo].[Order_Payments]

- [PAY_NUMBER] - masked (shows last 4)
- [CREDIT_CARD_EXPIRES] - masked
- [CREDIT_CARD_NAME] - cleared
- [ENCRYPT_CREDIT_CARD_EXPIRES] - cleared
- [ENCRYPT_PAY_NUMBER] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

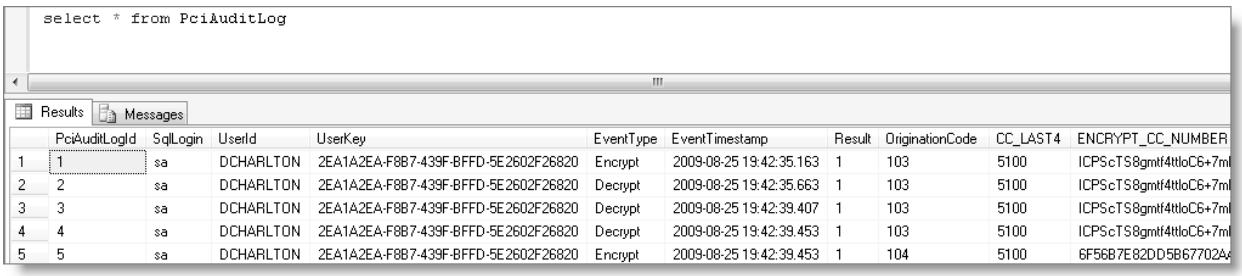
Table: [dbo].[OrderCheckout]

- [CreditCardNumber] - masked (shows last 4)
- [CreditCardExpiration] - masked
- [CreditCardName] - cleared
- [CreditCardAddress] - cleared
- [CreditCardAddress2] - cleared

- [CreditCardAddress3] - cleared
- [CreditCardCity] - cleared
- [CreditCardState] - cleared
- [CreditCardPostalCode] - cleared
- [CreditCardCountry] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Reading the PciAuditLog table

Implementing the first option for PCI Compliance logs rather than deletes cardholder information. This option allows you to support deferred payment processing (such as for recurring payments, donations, and subscriptions), which is a common reason for wanting to continue to store cardholder data in iMIS. This audit logging populates the PciAuditLog table, which records information to help you account for and track down incidents: who did the accessing, what triggered the logging, what type of event is being logged, and what cardholder information was accessed.



```
select * from PciAuditLog
```

Results | Messages

	PciAuditLogId	SqlLogin	UserId	UserKey	EventType	EventTimestamp	Result	OriginationCode	CC_LAST4	ENCRYPT_CC_NUMBER
1	1	sa	DCHARLTON	2EA1A2EA-F8B7-439F-BFFD-5E2602F26820	Encrypt	2009-08-25 19:42:35.163	1	103	5100	ICPScTS8gmtf4ttloC6+7ml
2	2	sa	DCHARLTON	2EA1A2EA-F8B7-439F-BFFD-5E2602F26820	Decrypt	2009-08-25 19:42:35.663	1	103	5100	ICPScTS8gmtf4ttloC6+7ml
3	3	sa	DCHARLTON	2EA1A2EA-F8B7-439F-BFFD-5E2602F26820	Decrypt	2009-08-25 19:42:39.407	1	103	5100	ICPScTS8gmtf4ttloC6+7ml
4	4	sa	DCHARLTON	2EA1A2EA-F8B7-439F-BFFD-5E2602F26820	Decrypt	2009-08-25 19:42:39.453	1	103	5100	ICPScTS8gmtf4ttloC6+7ml
5	5	sa	DCHARLTON	2EA1A2EA-F8B7-439F-BFFD-5E2602F26820	Encrypt	2009-08-25 19:42:39.453	1	104	5100	6F56B7E82DD5B67702A

To read the PCI Audit Log

> **Note:** Tip: Focus on the UserID for identification (versus the changeable UserKey), and be aware that each transaction can generate multiple unique records in the audit table, all having similar timestamps.

Five types of data events (EventType) trigger iMIS audit logging:

1. Decrypt - created by any action that requires an encrypted card number to be decrypted (such as selecting Print Deferred Pre-authorization Report or submitting deferred authorizations)
2. Encrypt - created by any action that encrypts a card number (such as entering a credit card payment through any interface)
3. UpdateLog - any attempt to modify an existing entry in the log
4. DeleteLog - any attempt to delete an existing entry in the log
5. ChangedEncryptionKey - any time the Reset Encryption Key and Data command is run from DB Maintenance

   The origination codes (OriginationCode) identify the source of the action that generated the log entry:

- 100 SQL table itself (originated in the trigger: an attempt to delete or change the log using SQL)
- 101 iMIS Desktop: AsiUtil.dll
- 102 Public/Full view: Asi.dll
- 103 Public/Full view: Secure.dll
- 104 Public/Full view: Asi.iBO.dll
- 105 Change to the encryption key

  The Result values tell you about the outcome of the event:

- For Encrypt entries, the result is true if the encryption succeeded (that is, encrypted value exists).
- For UpdateLog and DeleteLog entries, the result is always false because iMIS blocks all updates to and deletions from the log.

Settings for VAT taxation

When your default organization is configured for VAT, then you see a VAT Setup button to the right of the AR/Cash > Set up module options. These options default to the most commonly needed taxation modes.

See "Configuring VAT options in AR/Cash" in International Taxation to ensure that you select the best global configuration for your organization's needs.

AR/Cash: Set up tables

You must set up certain AR/Cash tables as part of your system setup before beginning live operations. There are four tables to maintain for the AR/Cash module. These tables can be accessed from AR/Cash by selecting Set up tables.

- Products
- Terms
- Tax codes
- Cash accounts

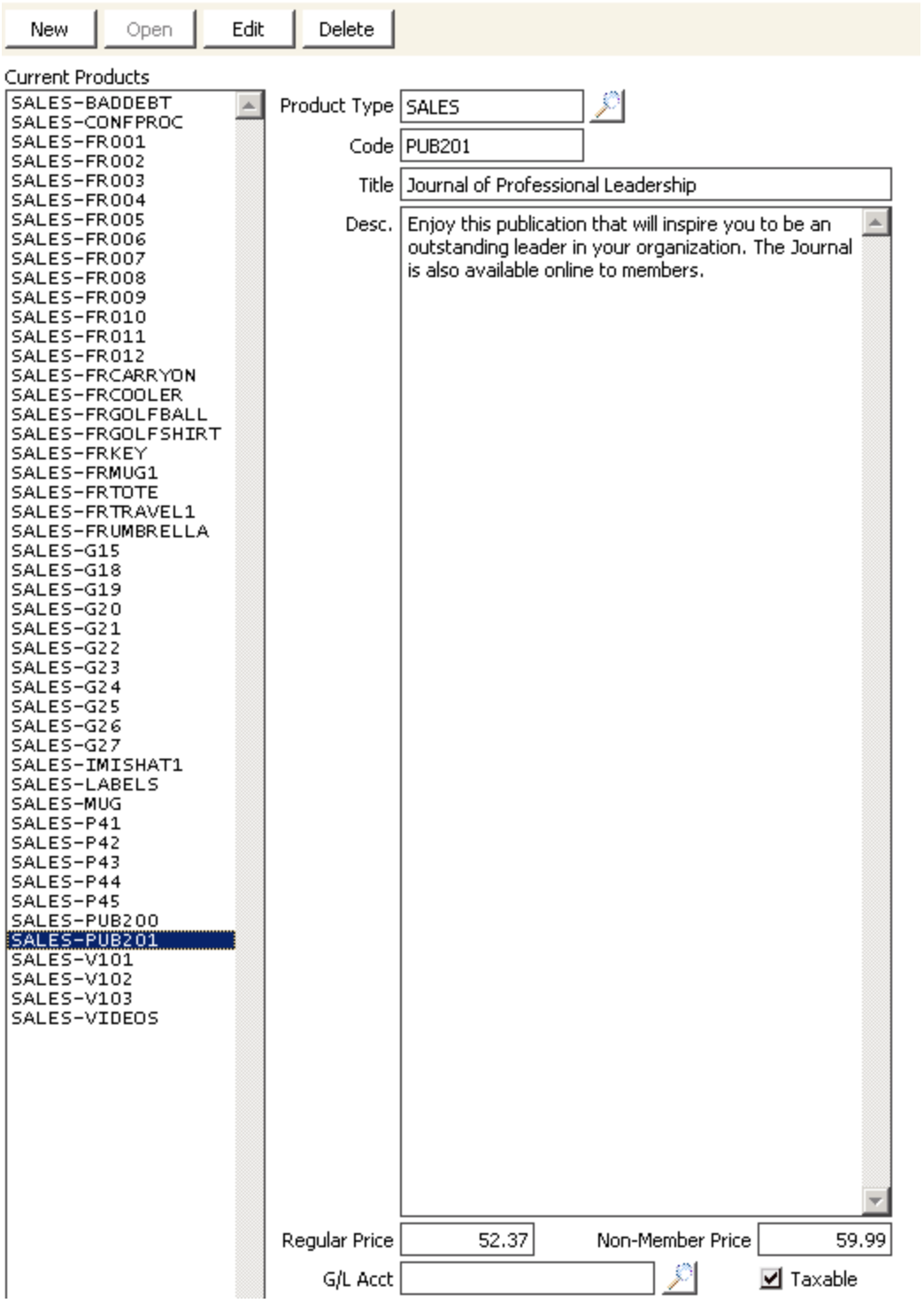
Setting up products

The following iMIS windows use the information on the Set up products window:

- Enter and edit sales transactions - You must first define all sales-related detail items recorded in a sales transaction as products on the Set up products window.
- Enter and edit orders - As you enter sales line items, you must enter the product codes directly or use the standard lookup window to select a value.
- (AR/Cash) Enter and edit credit memos - All adjustment-related line items recorded on the Enter and edit credit memos window must reference a product code entered on the Set up products window.
- (AR/Cash) Enter and edit debit memos - All adjustment-related line items recorded on the

Enter and edit debit memos window must reference a product code entered on the Set up products window.

Set up products window



Admin Console: Accounting > Options > Set up tables > Set up products
Desktop: AR/Cash > Set up tables > Products

Current Products

All defined products are displayed in this drop-down list.

Product Type

Dictates which iMIS module relates to the product record. All AR window data entry products must share the common product type of SALES. You can use the lookup icon and select a value.

Code

Assign a primary abbreviation or identification code to represent this product, sales, or adjustment item. There must be one product code for each billable product.

Title

Enter a longer descriptive title for the product or item type. When this product record is referenced on related data-entry windows or reports/inquiries, the product title appears next to the product code.

Desc.

(optional) Enter a note, description, or comment(s) that relates to the product.

Regular Price

Enter the main (default) unit price or the customer price that is automatically applied when you enter a sales line item for this product. You can override this default price while entering data.

Non-Member Price

If you charge a different price for non-members, enter that amount here so that the system can automatically apply the price when this item is purchased by anyone with a non-member status.

G/L Acct

Identifies the GL income account that is credited when entries are made for this product. (You can use the lookup icon and select a value.)

If you leave this field blank, iMIS records the income for this product in the default Income account you designated on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts).

It is not necessary to establish GL accounts on the product code tables if you are not using a GL interface and you are not relying on specific accounting reports from iMIS.

Taxable

Enable if the product is subject to sales tax.

Tax Code

(Full Order Entry only) Enter the state sales tax code or use the lookup icon and select a value.

Taxable (GST)

(Canadian Taxation only) Enable the Taxable (GST) option to apply Canadian GST taxation to the product.

Taxable (PST)

(Canadian Taxation only) Enable the Taxable (PST) option to apply Canadian PST taxation to the product.

Print button

Select to print information on all currently defined products. This information includes product type, product code, product title, and product price.

Special Prices button

Opens the Special Pricing window where you can specify pricing based on the Customer Type and other optional categories. The most common use for Special Prices is to provide quantity discounts when someone orders a particular product.

To define product codes

1. From Set up products, click New.
2. Enter a Product Type, or click the Find icon to select a value.
3. Enter the product Code. Special characters such as hyphens are not allowed.
4. Enter a Title that you want displayed on reports.
5. Enter a description of the product in the Desc. field.
6. Enter a Regular Price and a Non-Member Price.
7. Enter the G/L Acct, or click the Find icon to select a value.
8. Enable the appropriate Taxable option if the product is subject to a sales tax.
9. Click Save.
10. (optional) Click Special Prices to open the Special Pricing window.
11. Click New.
12. In the Type field, enter a Customer Type or Customer Type/category combination.
13. In the Description field, enter a name for the special pricing rule.
14. Select a pricing option. For example, select Numeric Table for quantity pricing.
15. In the Source Field, enter the field whose value is the basis for determining the Special Price. For example, for quantity discounts, the ordered quantity is the determining field.

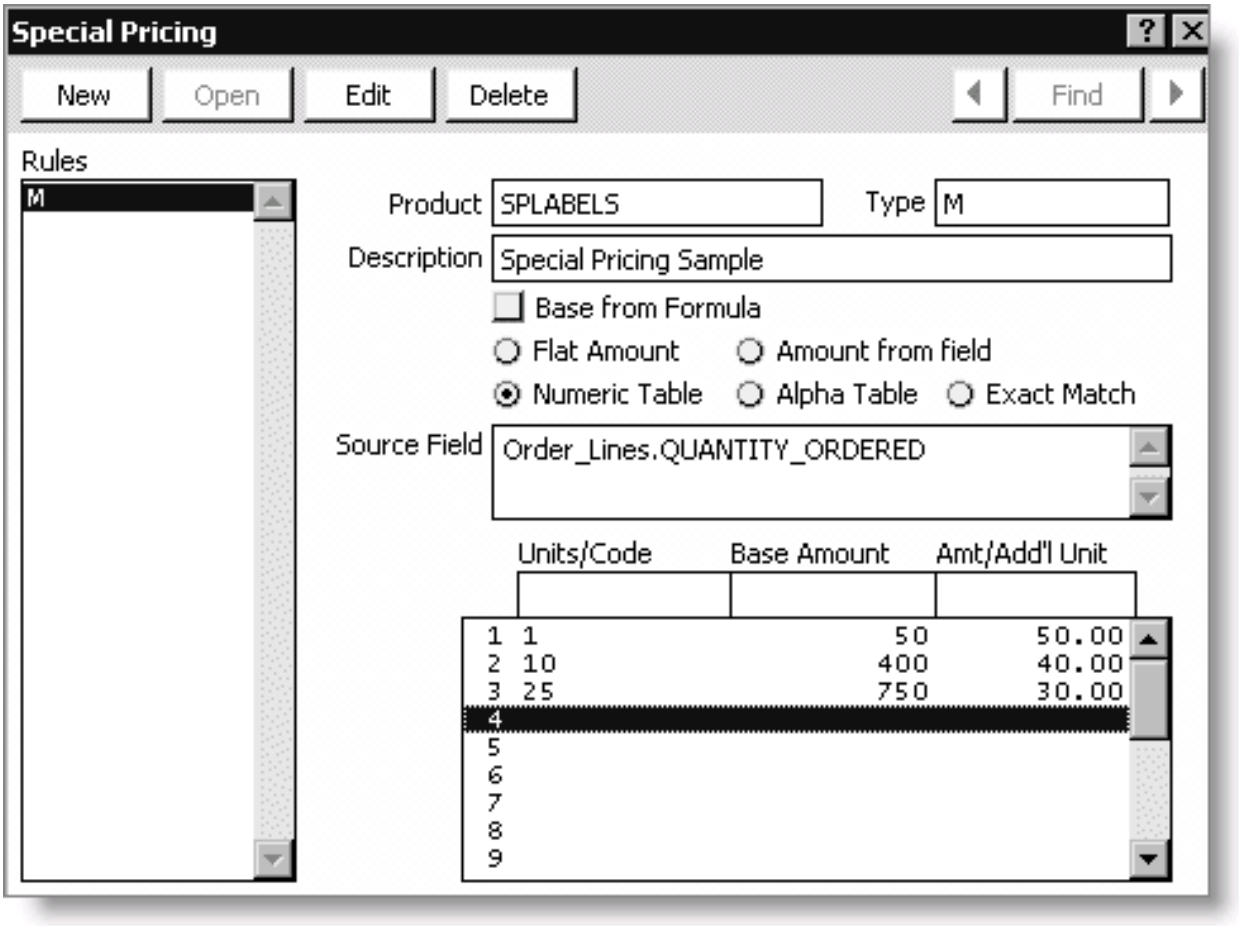
    Order_Lines.QUANTITY_ORDERED

- For each quantity discount pricing level, enter the following:
- Units/Code - The required quantity necessary to receive the quantity price break
- Base Amount - The extended amount of the initial quantity, for example, the value in the Units/Code field times the Amt/Add'l Unit (special unit price) = Base Amount
- Amt/Add'l Unit -The per unit special price amount

The following is a calculation example to determine the special price (discount) if a customer orders a product in volume.

- Line 1 = $50 per unit
- Line 2 = $40 per unit, if the customer orders 10 or more
- Line 3 = $30 per unit, if the customer orders 25 or more

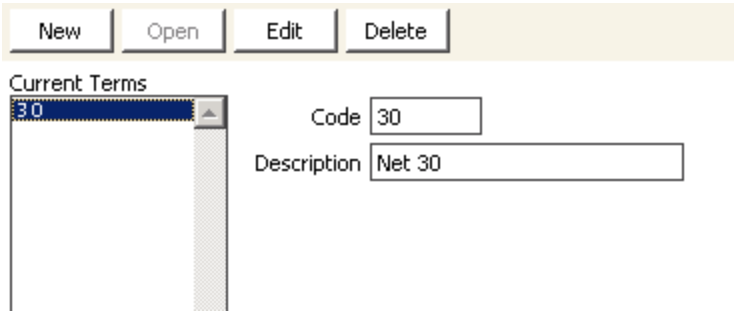
16. Click Save.



Setting up payment terms

The Set up terms window allows you to define the various customer payment terms that your organization allows. Terms allow you to print an appropriate term's description on Order Entry invoices.

Set up terms window



Admin Console: Accounting > Options > Set up tables > Set up terms
Desktop: AR/Cash > Set up tables > Terms

Current Terms

This list displays the currently defined terms.

Code

This field specifies the code for the terms.

Description

This field contains a description of the terms.

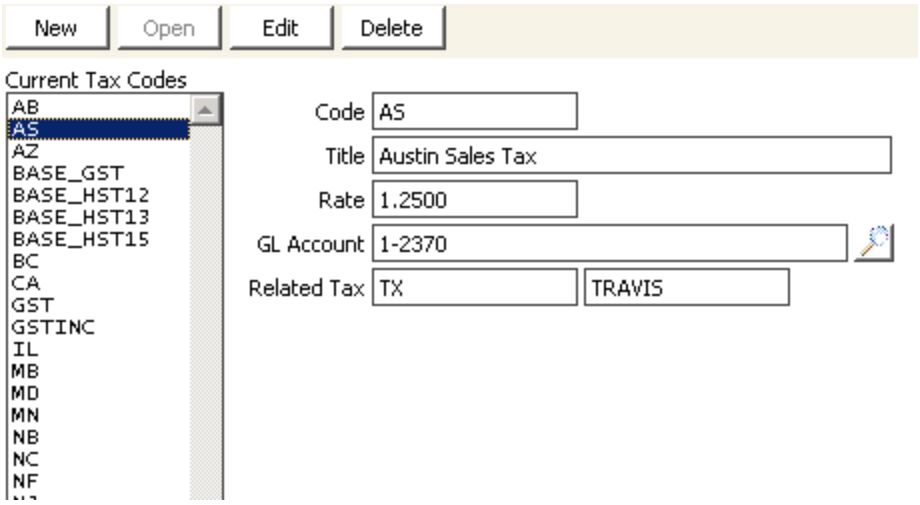
To set up the payment terms

1. From Set up tables terms, click New.
2. In the Code field, enter the code or abbreviation to create the term category.
3. In the Description field, enter the longer description that you want to see printed on invoices for the term category (for example, Net 30).
4. Click Save.

Setting up tax codes

The Set up tax codes window lets you record and use tax information that applies to your product orders.

Set up tax codes window



Admin Console: Accounting > Options > Set up tables > Set up tax codes
Desktop: AR/Cash > Set up tables > Tax codes

Current Tax Codes

This list displays the currently defined tax codes.

Code

Enter the abbreviation you want to assign to the tax category. For the best results when defining a state tax, use standard state abbreviation so the tax code on the Enter and edit orders window (from AR/Cash, select Process orders> Enter and edit orders) can automatically default to the customer's state abbreviation.

Title

Enter the full name to assign to the tax code. This description helps users select from the available taxes using the look-up function.

Rate

Enter the percentage rate assigned to the tax.

GL Account

Enter the general ledger account number assigned to the tax code, or use the lookup icon to select a value.

If you leave this field blank, iMIS records this entry in the Sales Tax account that you designated on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts).

Related Tax

These fields allow you to piggyback (use multiple) one or two additional Tax Authority codes.

Enter the codes for any other taxes you want to relate to the tax code. As shown on the previous Set up tax codes window, a city tax may always be associated with a county and a state tax. These tax codes must always be set up in distinct accounts so that the taxes can be tracked separately but calculated for the customer as a single amount.

To enter a new tax code

1. From Set up tax tax codes, click New.
2. In the Code field, enter the abbreviation you want to assign to the tax category.
3. In the Title field, enter the full name assigned to the tax.
4. In the Rate field, enter the percentage rate assigned to the tax.
5. In the GL Account field, enter the GL account number assigned to the tax, or click the Find icon to select a value.
6. In the Related Tax field, enter the codes for any other taxes you want to relate to the tax, such as a city or county tax code.
7. Click Save.

Setting up cash accounts

Use the Set up cash accounts window to define the cash accounts where you will record cash deposits and credit and debit card deposits.

It is necessary to create entries on the Set up cash accounts window under the following circumstances:

- If you accept and process credit/debit card receipts, you must create a cash account code to represent each credit/debit card type, along with the cash account where the card receipts should be posted if the card type is unique.
- If you are using batch control, a cash account is required to represent each checking account (even if you have only a single account).
- If you accept in-kind or asset fundraising donations you must set up a cash account for each GL account to which these gifts will be posted.

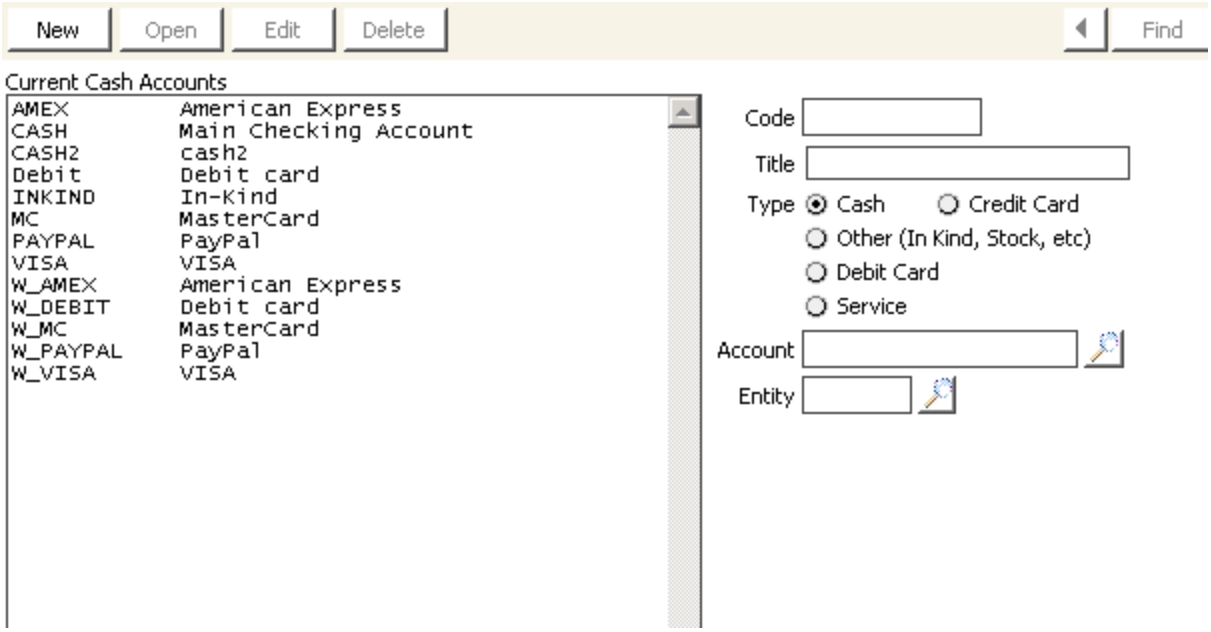
Defining credit/debit card codes and accounts

In order to process credit/debit card receipts, you must define the card codes on the Set up cash accounts window. This setup allows each card to have a unique bank account, for example, VISA=1020, AMEX=1030, DISC=1040 and so forth. This setup also allows card payments to override the batch bank account, because each card has its own bank account.

If the batch control option is not enabled, assigning a GL account number to a credit/debit card code takes precedence over the cash account selected for the batch and the default cash account number.

When you use batch control to define credit/debit card code accounts, you can enter both cash transactions and credit/debit card transactions, creating a mixed batch. iMIS splits and posts the payment transactions accordingly.

Set up cash accounts window



Admin Console: Accounting > Options > Set up tables > Set up cash accounts
Desktop: AR/Cash > Set up tables > Cash accounts

Current Cash Accounts

This column lists all currently defined cash accounts for recording cash deposits.

Code

Specifies the abbreviation assigned to the currently selected cash account or credit card type.

Title

Specifies the full name assigned to the cash account. This description helps users select from the available cash accounts in a lookup window.

Type

Specifies one of the following account types:

- Cash - Specifies that the account is a checking or other deposit account (other than a credit card account).
- Credit Card - Specifies that the account is a credit card account.

- Other - Specifies that the account is a non-cash asset account.
- Debit Card - Specifies that the account is a European debit card account.
- Service – Specifies that the account is a third-party payment service, such as PayPal Express.

Account

Specifies the GL chart of accounts number for the cash account.

Entity

(Only required for multiple entities (see "Multiple Entity Processing") Specifies the code for the entity that owns this cash account.

CC Auth Account

Specifies the Account Code of the credit card authorization account as set up in the AR/Cash Credit Card Authorization window.

CSC Required Web Entry

Requires entry of a card's CSC number in payment entry windows in the web-based views of iMIS. When cleared, card information can be submitted without the CSC number in web payment entry windows. This must be set up for each individual credit card or debit card account.

CSC Required Workstation Entry

Requires entry of a card's CSC number in payment entry windows in iMIS. When cleared, card information can be submitted without the CSC number in payment entry windows in iMIS.

Display Issue Number

Displays a field for entering a European debit card's issue number in payment entry windows. When cleared, the Issue Number field is not displayed in payment entry windows.

Display Issue Date

Displays a field for entering a European debit card's issue date in payment entry windows. When cleared, the Issue Date field is not displayed in payment entry windows.

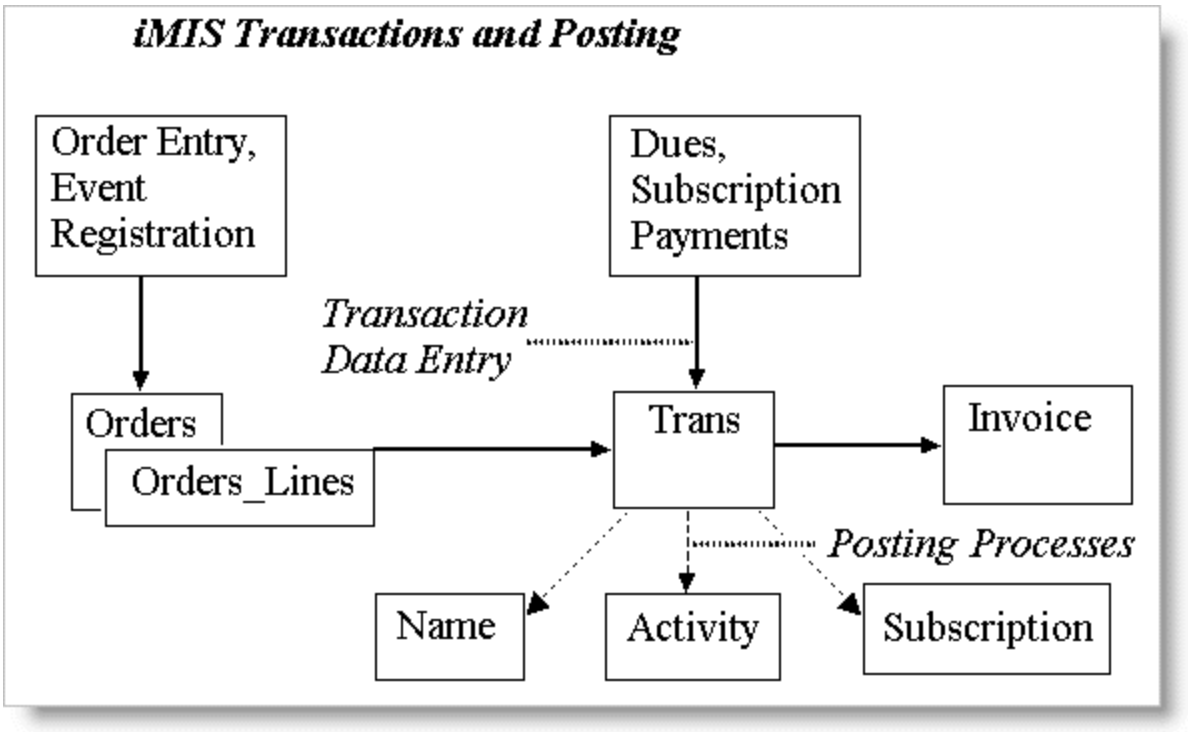
To define cash and credit/debit card codes and accounts

1. From Set up cash accounts, press New.
2. In the Code field, enter the abbreviation you want to assign to the cash account or credit/debit card type you are creating.

   Note: You can use any code you prefer for a credit/debit card, and you can specify a different entity for each credit/debit card code. For example, you can assign VISA1 to GEN, and VISA2 to BLDG.
3. In the Title field, enter the full name you want to assign to the account.
4. Under Type, select the Cash, Credit Card, Other, Debit Card, or Service option.
5. In the Account field, enter the GL chart of accounts number for the cash account assigned to this table entry, or click the Find icon to select a value.
6. (optional) For multiple entities, enter the Entity code, or click the Find icon to select a value.
7. For the Service option, select a gateway such as PayPal Express.
8. Click Save.

Accounting Tables

There are several central tables that track the accounting transactions generated by the iMIS modules. This section describes the central table, summarizes the reports based on those tables, and describes how the tables are updated throughout iMIS.



iMIS Transactions and Posting

Accounting impacts of direct transactions and orders

Accounting effect of direct transactions

The types of AR module direct transactions include sales transactions, cash receipts, credit memos, and debit adjustments

All of these transaction types generate new multiple-line/record Trans entries and generate or update the Invoice table records. With the exception of cash receipts, all generate activity records.

Accounting effect of direct orders

Generates Orders and Order_Lines records only, so there is no accounting effect at this time.

Accounting effect of printing invoices

Generates a single summary Invoice record for each invoice printed and a multiple-line/record Trans entry with these elements:

- Payment in Full - Generates a debit to cash for the payment amount and a credit to income/deferred for total amount of fees
- No Payment - Generates a debit to the default AR account and a credit to income/deferred for the total amount of fees
- Under Payment - Generates a debit to cash for the payment amount, a credit to income/deferred for the total amount of fees, and an additional debit to the default AR account for the remaining amount owed
- Over Payment - Generates a debit to cash for the payment amount, a credit to income/deferred for the total amount of fees, and an additional credit to the default AR account for the amount overpaid

Main accounting tables

iMIS AR/Cash uses two basic tables to track accounting details and status information:

- Trans table
- Invoice table

Trans table

The Trans(action) table is the primary accounting detail table. The Trans table contains normal multiple-line, balancing (debit/credit) accounts transaction entries that affect cash, AR, income, and related GL accounts.

Multiple trans records

Multiple Trans records are generated for each debit or credit line in the entry. All lines for one entry are linked as one through a common system-assigned transaction number: Trans_Number, individual system generated Line_Number.

> **Note:** Note: One multiple-line transaction entry is the same as manual system journal entry.

Trans table fields

The following are some of the fields contained in the trans table.

TRANS_NUMBER

(Part of primary key) A unique sequential number assigned to each set of transaction lines or journal entry representing a single accounting transaction.

LINE_NUMBER

(Part of primary key) A sequential number assigned to each line within the transaction set or journal entry. For example, the number 1 is assigned to the first line for a transaction, the number 2 is assigned to the second line, and so on. There can be duplicate line numbers.

SUB_LINE_NUMBER

(Part of primary key) A sequential number assigned as the sub line number when distributions for an invoice are assigned across multiple entities. The accounting record must then also be split by an entity to keep the accounting straight. For example, this can happen when different entities are assigned to dues products when using accrual dues, and also when processing split gifts in Fundraising.

BATCH_NUM

The number or code representing the batch to which this transaction belongs, typically coinciding with the active batch at the time the transaction was entered or generated. If batch control is not enabled, this field is blank.

TRANSACTION_DATE

The accounting date assigned to the transaction. If batch control is enabled, this should match the batch date.

FISCAL_PERIOD

The month/year combination (YYYYMM) which represents the accounting fiscal period to which the transaction belongs. This is calculated based upon the transaction date in conjunction with the value in the First Month of Fiscal Year (Number) field in the Set up module window (from AR/Cash, select Set up module). This field will only match the

month/year combination of the transaction date if the fiscal year begins in January. Used for interfacing to certain GL packages.

BT_ID

The ID number of the customer who has financial responsibility for this transaction

ST_ID

The ID number of the customer who is the recipient of the goods or services related to the transaction.

CUSTOMER_REFERENCE

The purchase order number or a similar brief reference that needs to be reported to the customer to allow proper identification of the transaction.

SOURCE_CODE

The marketing code, typically used to help analyze and track the success of various marketing programs

SOURCE_SYSTEM

The code representing the iMIS module where the transaction was entered or generated. The common module SOURCE_SYSTEM codes include AR for any transaction entered or generated (simple order entry invoicing) on the AR/Cash menu, MEETING for meeting-registration generated transactions, ORDER for full order entry invoice and credit memo transactions, DUES for cash-based dues payment and accrual-based billing transactions, and FR for pledges and donations entered on the Enter and edit gifts window.

JOURNAL_TYPE

The code representing the general type of transaction or journal entry. These types include the following:

- IN is usually assigned to an initial income recording transaction. Transactions which are assigned IN normally include sales transactions, transactions generated by order invoicing, transactions generated through the event-registration process, and fundraising

gifts and pledges.

- PAY denotes a payment or cash receipt related to open items.
- CM denotes transactions entered through the Enter and edit credit memos window (from AR/Cash, select Enter and edit transactions> Credit memos) or generated by processing a credit-memo order type.
- DM denotes transactions entered through the Enter and edit debit memos window (from AR/Cash, select Enter and edit transactions> Debit memos) or generated by processing a debit-memo order type. This type is used also in the offset entry to the Prepaid Order account when prepaid orders are invoiced.
- REF is the code assigned to transactions generated by the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices) during the issue refunds process.
- PP is the code assigned to cash/prepaid order transactions generated when cash is entered on an open order.

TRANSACTION_TYPE

The code that denotes the type of individual transaction line. These types include the following:

- AR denotes a debit or credit entry to the accounts receivable account.
- PAY typically denotes an entry to a cash account. The two exceptions are for *Tab transfers, where the PAY line is represents an entry to the accounts receivable account, and refund transactions, where the PAY line represents an entry to the Refund Clearing account. *Tab AR entries disguised as PAY lines are detected by checking for an * in the first position of the Check/CC field. Refund/clearing entries are located by checking for the PAY type and REF journal type combination.
- DIST denotes an entry made to income, expense, or miscellaneous charges.
- PP denotes an entry made to the Prepaid Orders unearned income balance sheet account.

- TR denotes a transfer/clearing entry made in conjunction with *Tab transfers and during the invoicing of prepaid orders. Used to supply the necessary invoice-level transaction audit trail when a single debit or credit line needs to support two separate invoice records simultaneously.

  OWNER_ORG_CODE

  The entity owner of the overall transaction. In the case of an income/invoice related transaction, this is the overall income owner. In the case of a cash-receipt or dues cash payment transaction, this is the cash owner entity (or owner of the open credit when an *Tab transfer is recorded).

  GL_ACCOUNT_ORG_CODE

  The entity owner of the individual transaction account number. In the case of an income/invoice related transaction, this entity may differ from the value of the OWNER_ORG_CODE field on the payment line. In the case of a cash receipt, the value of the application line's GL_ACCOUNT_ORG_CODE field may differ from the value of the OWNER_ORG_CODE field if the open AR line has a different entity owner.

  PRODUCT_CODE

  On DIST or distribution lines, the originating PRODUCT_CODE value is retained here.

  PSEUDO_ACCOUNT

  A system-generated code consisting of the following three components:

- GL_ACCOUNT_ORG_CODE
- SOURCE_SYSTEM
- PRODUCT CODE on a DIST line or TRANSACTION_TYPE on all other lines

  This field is frequently used in the description lines in summary entries in the GL interface export/import files. This field can be used to identify the correct GL account when an account has been left blank or is incorrect.

  GL_ACCOUNT

The actual general ledger account number. In the case of a deferred income transaction, this field represents the future income account.

DEFERRED_GL_ACCOUNT

In the case of a deferred income transaction line, this is the account to which the initial general ledger entry will be made.

EFFECTIVE_DATE

In dues/subscriptions related transactions, this field contains the beginning date of the term being paid for, or in the case of an accrual-dues transaction, the beginning date of the term being billed. In the case of a deferred income transaction line, this field contains the trigger date when the income will begin to be recognized.

MONTHS_PAID

In dues/subscriptions related transactions, this field contains the number of months being paid for within the term, or in the case of an accrual-dues transaction, the number of months being billed within the term. In the case of a deferred income transaction line, this field contains the number of months over which the income will be recognized.

AMOUNT

The actual debit or credit amount

INVOICE_CHARGES

The amount (if any) which has been or will be posted to the linked Invoice summary record's charges total

INVOICE_CREDITS

The amount (if any) which has been or will be posted to the linked invoice summary record's credits total

POSTED

Represents the posted status of the transaction. The possibilities include the following:

- 0 denotes unposted. This value typically exists only if the Separate Posting Cycle Required option is enabled on the AR/Cash Batch Control window (from AR/Cash, select Set up module, and click Batch Control).
- 2 denotes posted to the relevant iMIS tables that are appropriate for the Transaction. These tables may include Invoice, Activity, and Subscriptions.
- 4 denotes transferred to the general ledger through a GL Interface export/import operation.

ENTERED_BY

The USER ID of the iMIS user who initially entered the transaction

DATE_ENTERED

The date and time that the transaction was initially entered

Invoice table

The Invoice table contains a summary of transaction activity for each invoice or related item.

iMIS generates a new invoice record for each new event registration, sales transaction, or (printed) simple order entry invoice, whether or not the item was paid in full.

Future payments or adjustments update the balances/buckets in the appropriate pre-existing invoice record. Therefore, multiple sets of transaction entries are posted to a single invoice record.

Invoice numbers

The key field in the Invoice table is the system-assigned reference number. The system-assigned reference number is different from the invoice number. The system-assigned reference number links transactions to the invoice. For example: Trans.Invoice_Reference_Number = Invoice.Reference_Number

The invoice number, which also is a major key, is assigned only when you run an invoice print procedure (for simple order entry or event registration) or if the operator enters a manual invoice number for a sales transaction.

In many cases, an invoice number may never be assigned, for example, a paid-in-full item, or meeting registrations where the confirmation letters are used in place of official invoice notices.

AR/Accounting table reports

The Trans table and the Invoice table, the two main accounting tables, generate the following types of output:

Trans table reports

- Transaction and Batch Reports in iMIS AR/Cash, Billing, and Events modules
- Detail and summary pseudo and actual GL distribution reports
- Ledger card displays that are found in the following windows:
- AR/Cash tab on the Manage customers window (double-click on a record to see the Trans detail)
- (AR/Cash) Enter and edit orders window (only available when you display an order for which the invoice has been printed)
- Events Register a customer window
- GL interface

Invoice table reports

- AR trial balance report
- AR statements
- Customer AR window (scrolling invoice summary lines)

Other related iMIS tables

Although not considered key accounting tables, the following tables are updated by the procedures/modules that generate the main accounting data.

Subscription Module

The Subscription Module contains primary summary information on the status of each dues/subscription line item billed and/or paid for each customer. For cash-basis dues billing operations, this table also serves as a memo AR type of file with no accounting impact. The Subscription Module is used in these input/output operations to perform the following tasks:

- Generate initial and reminder dues notices
- Record billing payment receipts
- Display in the Billing tab of the Manage customers window

Orders and Order_Lines

The Orders and Order_Lines table serves as the master table for both the event registration function and the simple order entry subsystem function. Orders and Order_Lines are also the main tables for Order Processing. This table is used in the following output operations:

- Events Reports - badges, confirmation letters, labels, tickets, invoices, and rosters
- Simple Order Entry System - Order status report (used for validation purposes) and Invoices

Activity tables

The modules that generate accounting transactions also post monetary long-term history details into the general purpose Activity table. The long-term history details can be used later for inquiry and analysis. The activity updates are the by-product of the following operations:

- Billing Payments - Generates activity records for each line item paid
- Event Close - Generates a single activity record for each (uncanceled) registrant, reflecting the total amount of the registration
- Simple Order Entry & Advanced Order Entry - One product history record is generated for each line item in an invoice order

- AR Transactions - Includes sales transactions, credit memos, and debit adjustments, and generates one product history record for each line item

Deferred Income in iMIS

iMIS Deferred Income is an extension of the iMIS GL interface capabilities available for selected third-party GL software. This subsystem works in combination with AR/Cash, Billing, Events, Exhibitions, and Expositions. It allows your organization to postpone recognition of real income to a future point in time, when the billing period actually begins.

To enable this option, open the System Setup window (select File> System Setup) and edit your iMIS licensing to enable Deferred Income.

The deferred income feature is transparent to the user. If your iMIS system is licensed to run the Deferred Income module and the GL interface, deferred income tracking and processing can be automatically triggered for dues/subscription items, event registrations, and exhibition/exposition orders after your setup is complete.

The following terms are unique to the deferred income process.

Deferred income

Money that is credited to a liability account until it is recognized and transferred to the regular income account.

Earned income

Income that is recognized during a specific accounting period.

Working with deferred income

Deferred income provides delayed recognition of income to coincide with when the income is earned, to match when the related expenses are incurred, rather than when the invoice is generated or the funds are received. Deferred income credits a user-specified deferred income liability account rather than the regular income account when the transaction is initially entered. iMIS manages the recognition of the appropriate income amounts as the income is earned, and generates the corresponding entries to transfer

those amounts from the deferred income account to the regular income account in the General Ledger.

iMIS processes deferred income arising from dues and subscription products differently than event registrations and exhibition/exposition orders. iMIS uses the following deferral methods to handle these transactions:

- Incremental - Deferred income for dues and subscription products is recognized in equal monthly increments over the number of months in the dues or subscription term, starting with the begin date. (iMIS calculates the term from the beginning and ending dates of the dues or subscription term.)

  For example, for a normal 12-month subscription, iMIS recognizes one-twelfth of the income during each month of the subscription term.

- Lump Sum - Deferred income for event registrations and exhibition/exposition orders is recognized in the month that the event occurs.

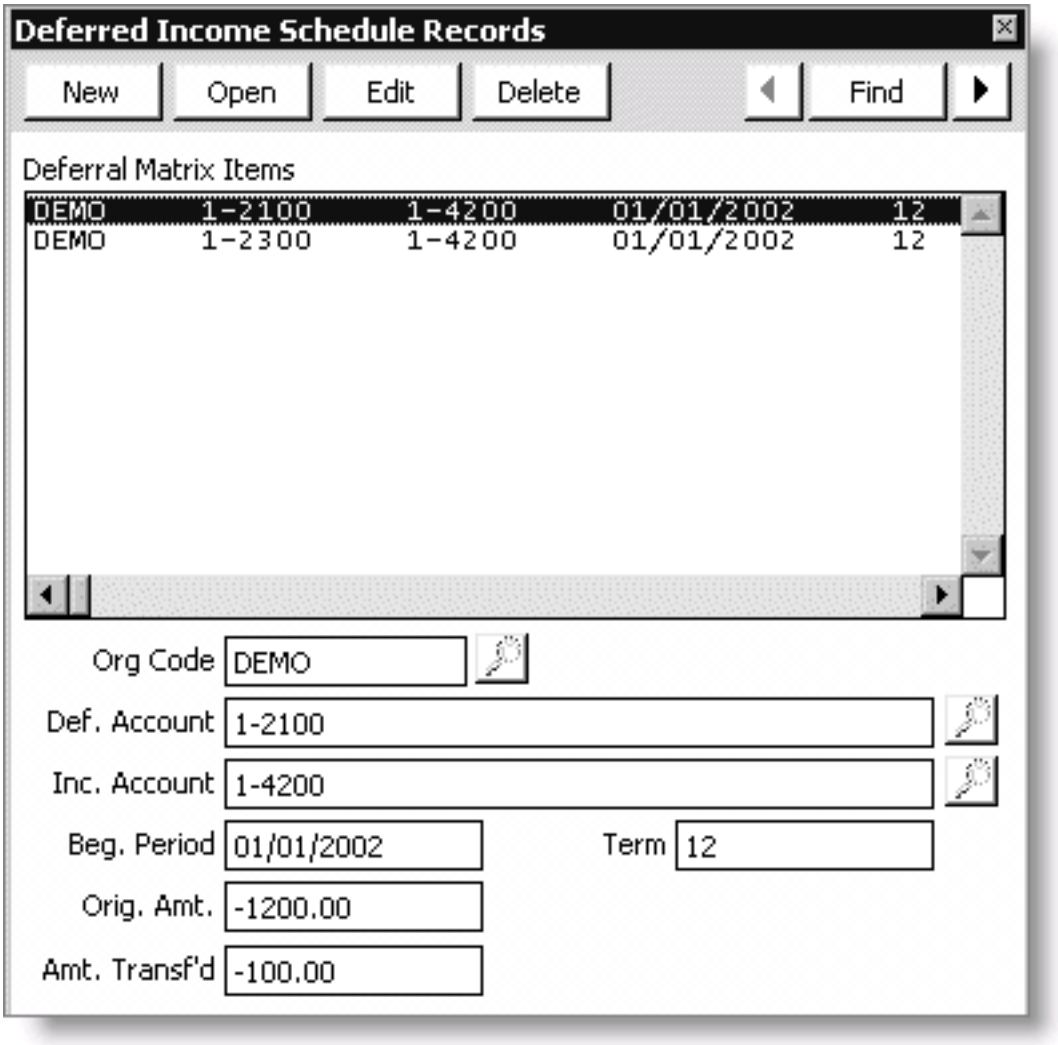
  For example, if the Begin Date of an event/exhibition/exposition is 12/10/2002, iMIS recognizes the entire amount of income on the first day of the month of the Begin Date, 12/01/2002.

  When the deferred income account is referenced for a dues/subscription product or an event/exhibition/exposition product, the full amount charged or received will be booked as deferred income. Each time the GL interface procedure runs; iMIS analyzes which deferred balances can be completely or partially identified as earned income. When iMIS finds deferred income amounts, it automatically generates journal entries to transfer earned income amounts out of deferred income.

  As iMIS processes individual deferred income transactions through the GL interface, the deferred income amounts are posted to a summarized Deferred Income Matrix (AR/Cash>Process month-end procedures>Deferred Income Schedule Records). This table (Deferral_Matrix) keeps track of the total balance in the deferred income account(s), which are divided into the following summary components:

- Deferred Account - Deferred income account number (Trans.DEFERRED_GL_ACCOUNT)
- Income Account - Income Account number (Trans.GL_ACCOUNT)
- Beginning Period - (for example, month-year) Date to begin income recognition (Trans.EFFECTIVE_DATE)
- Term - (for example, number of months) Time frame over which to spread income (Trans.MONTHS_PAID)

  An entry is made into this table for each Deferred Account-Income Account-Beginning Period-Term combination. From this structure, iMIS determines and generates the necessary entries to transfer amounts from deferred income to regular income.



The Deferred Income Schedule Records window

The iMIS GL interface procedure performs the work related to deferred income processing as follows:

1. Creates a deferred income entry to credit the deferred income account instead of the regular income account for the full amount for all deferred income transactions
2. Updates the deferred income matrix table for the combined dollar amount of the transactions involved
3. Analyzes the deferred income matrix and creates the appropriate transfer entries to recognize income

   Note: In some cases, transfer entries work in a catch-up mode. For example, if late cash-basis subscription payments are received and processed after the subscription term has begun, iMIS immediately recognizes the full amount due to be recognized as the accounting period being processed (that is, if a payment entry is recorded six months after a subscription started, iMIS generates an entry to recognize or transfer one-half (6 ¸ 12) of the subscription income amount).

   The following is an example of a GL interface file. Lines 3 and 4 create a deferred income entry to credit the deferred income accounts, and lines 5 and 6 analyze the deferred income matrix and create the transfer entries to recognize income.

   01/01/2002 1-1100 PAY,DEMO-DUES-PAY 1200.00

   01/01/2002 1-1200 AR,DEMO-MEETING-AR 500.00

   01/01/2002 1-2100 DIST,DEMO-DUES-BASIC -1200.00

   01/01/2002 1-2200 DIST,DEMO-MEETING-TECX/MAIN -500.00

   01/01/2002 1-4200 Deferred Income Transfer -100.00

   01/01/2002 1-2100 Deferred Income Transfer 100.00

Enabling deferred income processing

To set up deferred income processing, enter a deferred income account number in addition to the regular income account number for products and functions. You must identify both of these accounts in all relevant modules.

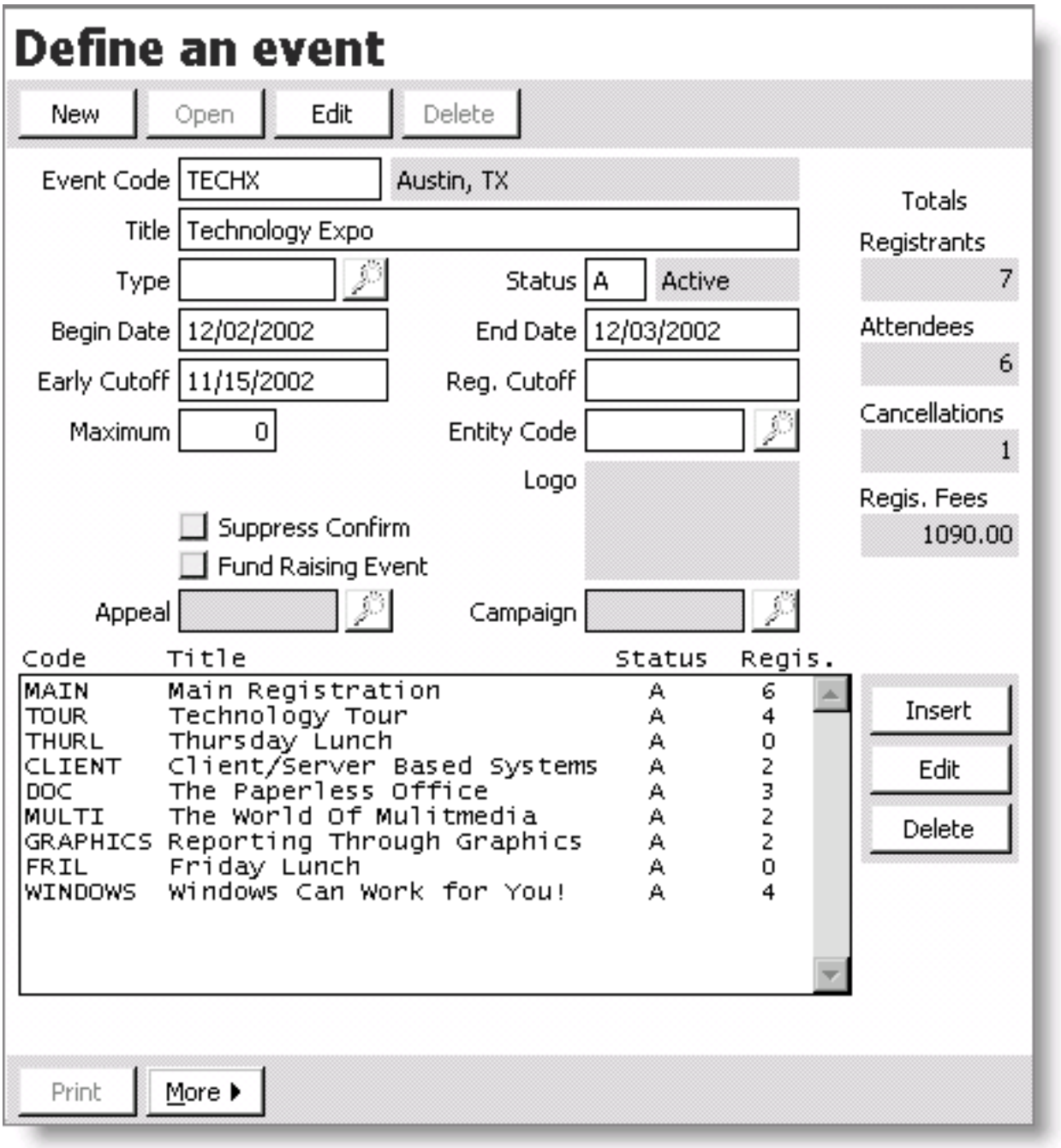
To set up deferred income for a dues or subscription product

1. From Billing, select Set up module > Products to open the Set up products window.
2. Select a current product from the Current Products list.
3. Click Edit.
4. Enter the income account number in the G/L Acct field, or press the lookup icon to select a value.
5. Enter the deferred income account number in the Deferred field, or click the lookup icon to select a value.
6. Click Save.

To enable deferred income for an event function

1. From Events, select Define an event to open the Define an event window.
2. Click on a line item to select an event.
3. Click Edit to open the Define an event window for the selected event.
4. Select the appropriate event function.
5. Click the Edit button displayed to the right of the event functions to open the Event Function Detail window.
6. Click More and select Fees from the drop-down list to open the Event Function Definition - Fees window.
7. On the Event Function Definition - Fees window, select the Default line item to display the Deferred Account field.

8. Enter an account number in the Deferred Account field, or click the Find icon to select a value.
9. Enter an account number in the Income Account field, or click the Find icon to select a value.
10. Click Save.



Processing deferred income transactions

Although the entries to record deferred income and subsequently recognize income are generated during the GL interface procedures, the determination of when the income will be recognized occurs as you process each transaction. Deferred income processing requires the following information:

- Deferred income account codes - The deferred income account must be entered on the Set up products window and the Event Function Definition - Fees window for all relevant products for which income recognition should be deferred. You must specify these accounts to enable deferred income processing.
- Verification of Begin Date and Term - For event registration and exhibition/exposition order transactions, verify that the event's Begin Date is correct. For dues/subscription products, verify that the billing term on each customer/subscriber's deferred line item is correct.

Deferring events/exhibition/exposition income

As event registrations and exhibition/exposition orders are processed and functions are selected which have a defined deferred income account, the income for these functions is automatically triggered for deferral until the month of the event, at which time 100% of the income is recognized.

Deferring dues/subscriptions income

Successful processing of dues/subscription deferred income transactions depends on products with a defined deferred income account number. Both cash dues and accrual dues use deferred income, but the time frame for the deferral varies based on the accounting method used. Cash dues defer income when payments are recorded or reversals are processed. Accrual dues defer income at billing time or when recording credit memos and debit adjustments. The beginning period and term period over which the income is recognized coincides with the beginning and ending date of the dues or subscription term.

Verifying the dues/subscription deferral term

A critical step in processing dues and subscription deferred income transactions is verifying the deferral term. The Begin Date on which the dues or subscription product goes into effect and the Paid Thru ending date, when the term expires, determine the deferral term for any single line item.

The projected dues/subscription term is initially established when the item is billed and displayed on the Dues/Subscription Item Detail window.

To view the projected dues or subscription term

1. From Customers, select Manage customers to open the Manage customers window.
2. Open a customer's record.
3. Select the Billing tab.

   Note: PAC is never deferred.
4. Double-click on a line item in the Billing tab to display the Dues/Subscription Item Detail window.

   The Period (or Begin Date) in the Last Billed section of the Dues/Subscription Item Detail window projects the date that the income begins to be recognized.

   The projected term across which the income will be evenly distributed is represented by the number of months between the Period or Begin Date and the Thru or Paid Thru date of the line item.

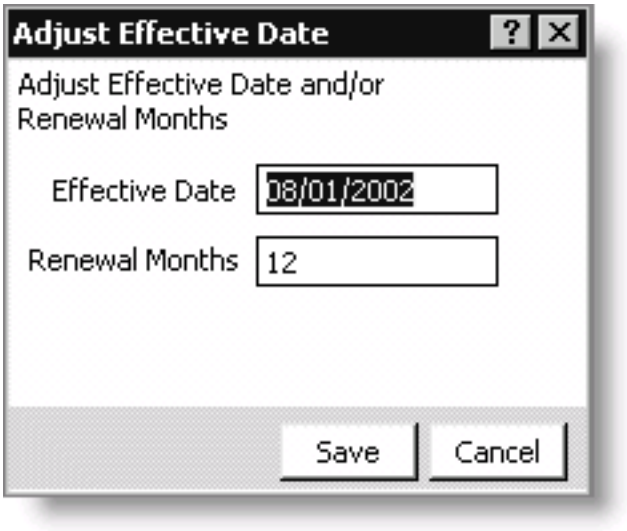
Ensuring an accurate deferral term

The accuracy of the deferral term depends primarily on the accuracy of the dates established in the Last Billed area, in Period (Subscriptions.BILL_BEGIN) and Thru (Subscriptions.BILL_THRU).

To ensure accuracy, you should understand how iMIS dues/subscription product billing and related processing automatically determines these dates. For more information, see How iMIS Works with Dates.

If your dues or subscription billing is done on a cash basis, term overrides can occur at payment time. If you override the system-calculated Paid Thru date on a deferred income line item, a window is displayed which allows verification and adjustment of the Effective Date or term (Renewal Months).

For example, if the projected Paid Thru date of the BASIC line item was changed from 06/30/2003 to 07/31/2003 during the payment data entry, the Adjust Effective Date window is displayed, allowing you to modify the Effective Date (begin date) or Renewal Months (term). If no changes are made, the Effective Date is set to 08/01/2002 and a 12-month term (08/01/2002 - 07/31/2003) is used. If you specify a different Effective Date and press Tab, the resulting term is automatically calculated and displayed in the Renewal Months field. If you specify a new term in the Renewal Months field and press Tab, the resulting begin date is automatically displayed in the Effective Date field.



Adjust Effective Date window

If you process dues on an accrual basis, no subsequent overrides of the system-calculated term are possible. Verify the term dates on your Billing Batch Detail Report or Individual Accrual Dues Posting window before finalizing the billing details.

Processing adjustments of deferred income

Cancellations, reversals, or adjustments of previously deferred dues/subscription income should be processed with the appropriate beginning period and term.

The GL interface procedure will automatically adjust the deferred income matrix for these transactions in iMIS and create the necessary entries to adjust the deferred income and earned income amounts in the General Ledger.

For information on adjustments when using cash dues, see Reversing and Canceling Payment Transactions.

For information on adjustments when using accrual dues, see Processing Adjustments.

Converting existing deferred income items

When you begin using iMIS to manage your deferred income, you have two options for dealing with the balance in the deferred income accounts at conversion time:

- Do Not Convert - Continue to create manual deferred income-to-regular income transfer entries only for the amounts currently in deferred income until all amounts are recognized. This may be the best method if your monthly income figures are already itemized in a manually prepared spreadsheet.
- Convert - Convert the deferred income balance by building an initial deferred income matrix before you begin adding iMIS deferred income transactions through the GL interface procedure.

Conversion methods for building the initial matrix

The conversion methods you can use to build this table include the following:

Conversion method 1

Enter the full amount originally posted to each deferred income account (and subsequent regular income account) combination for each month in the past and future for which there remains a balance to be recognized.

In this case, you must enter both the original amount posted to the deferred income account and the amount that has been transferred to regular income to date.

> **Note:** Note: For the best results, do not use this method unless your existing records lend themselves easily to this conversion.

Conversion method 2

(Recommended) Enter just the current balance remaining in the deferred income accounts by entering the amounts that are yet to be recognized (rather than the original amount posted).

One approach to building the table is to enter only current and future dates for each entry, that is, only the months remaining across which the current balance will be distributed. The net balance yet to be recognized is entered as the Orig Amt and leave the Amt Transf'd at zero. Use negative amounts to denote a credit amount, which is the typical entry for these fields.

Example 1

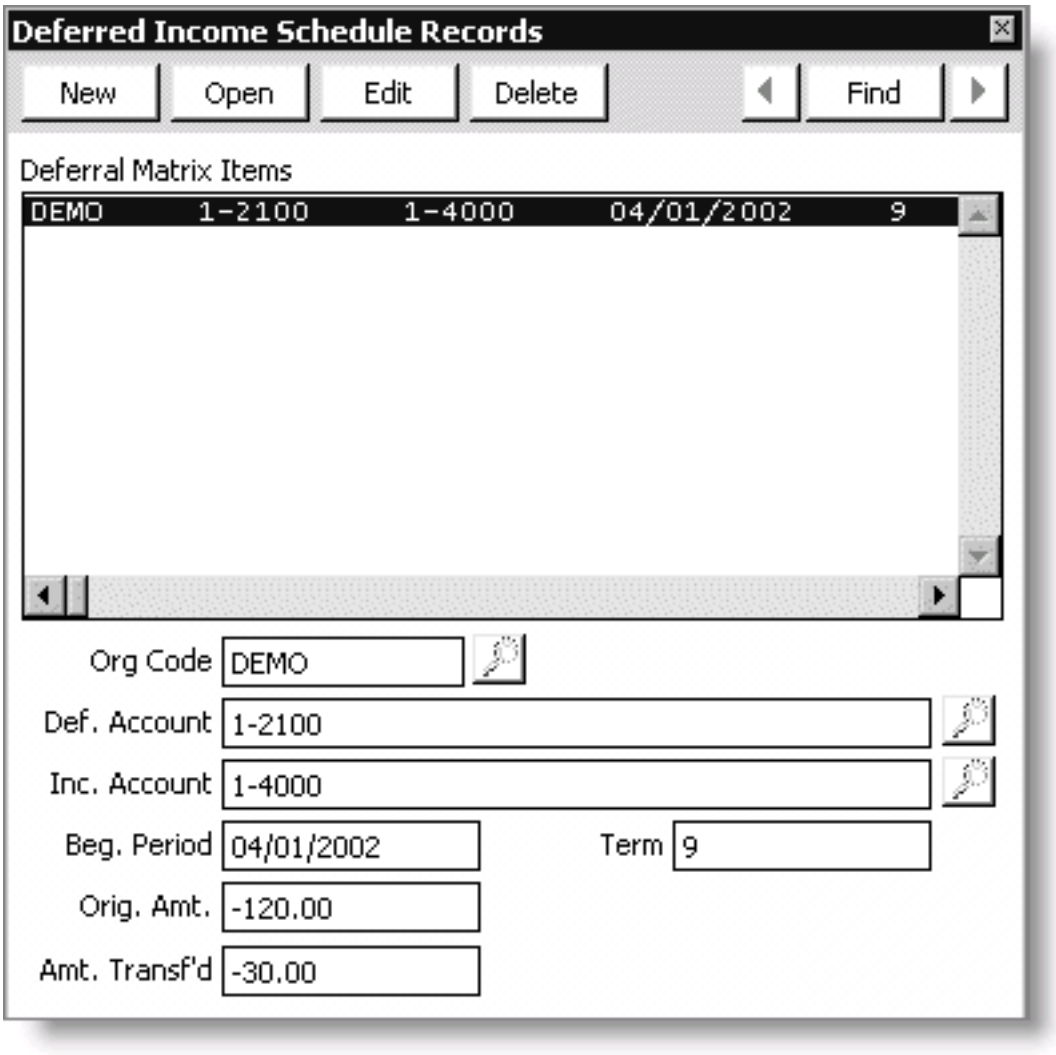
Deferred income transfer entries from January-March 2002 have been generated outside of iMIS, and will be converted effective April 1, 2002. As of the conversion month, only 9 months are left of the original 12-month term, and 3 monthly amounts of $25 have been transferred from the original deferred income balance of $300. The balance yet to be transferred is $225, which you enter as a negative amount in the Orig Amt field.

Another, and perhaps the easiest, approach is to prepare a schedule that itemizes the specific amounts to be transferred each month in the future, and convert the remaining balance by entering these individual monthly amounts in separate matrix records with single-month terms. Use a negative amount to denote a credit amount.

Example 2

Using the previous example where $25 is transferred each month, enter one entry for each month from April to December (totaling nine entries) with a one-month term and an amount of $25.

Deferred Income Schedule Records window



From AR/Cash, select Process month-end procedures, and click Deferred Income Records

To build the deferred income matrix initially, use the Deferred Income Schedules Records window. This window contains the following fields:

Find button

Select to find a deferred income entry. You can specify the Org Code, Def Account, Inc Account, Beg Period, Term, Orig Amt, or Amt Transf'd of the deferral income entry for the search. The first deferral income entry that matches the search criteria will be selected.

Deferral Matrix Items

The list of existing deferred income entries is displayed in this scrolling list.

Org Code

Enter the organization or entity code as established on the Organization Names window (select File> System Setup), or use the lookup icon to select a value.

Def Account

Enter the GL deferred income (liability) account number to which the original amount was initially posted (to await subsequent recognition and transfer to regular income), or use the lookup icon to select a value.

Inc Account

Enter the GL income account to which the amounts will be transferred as the income is earned and recognized, or use the lookup icon to select a value.

Beg Period

Enter the accounting date (typically month, first day of the month, year) either for which the income was initially recognized or will be recognized (Conversion method 1), or for which you want iMIS to begin generating the necessary transfer entries to recognize income and reduce deferred income (Conversion method 2).

Term

Enter the number of months over which the original amount is to be recognized as income. This may be the original term (Conversion method 1), the net number of months remaining within the original term for which income is yet to be transferred, or 1 (Conversion method 2).

Orig Amt

Enter the total dollar amount that will be recognized in prorated monthly amounts over the term of the deferred income item. Because deferred income accounts carry a credit bal-

ance, enter only negative amounts (enter a minus sign followed by the digits that represent the amount).

This field should contain one of the following:

- Original amount posted in the starting month to this deferred income/regular income/term combination (Conversion method 1)
- Net amount remaining to be recognized over the remainder of the term (Conversion method 2)
- Total amount of the existing deferred income balance to be transferred from the deferred income account identified to the regular income account identified for the single-month term (Conversion method 2)

Amt. Transf'd

Enter the dollar amount portion of the original amount already recognized in previous periods. As with the original amount, the amount transferred must be represented by a negative amount. (This field should only be used when using conversion method 1. See “Conversion Methods for Building the Initial Matrix”.)

To build the initial matrix

1. From AR/Cash, select Process month-end procedures.
2. Click Deferred Income Records to open the Deferred Income Schedule Records window.
3. To build the table, you must create one entry for each Deferred Account - Income Account - Beginning Period - Term (or number of months) -combination.
4. Click New.
5. Enter data into the Org Code, Def. Account, Inc. Account, Beg. Period, Orig. Amt., Amt. Transf'd, and Term fields, or click the Find icon to select a value.
6. Click Save.

Deferred income reports

Several summary and detail level reports let you review the status of deferred income. Go to AR/Cash > Generate reports > Deferred Income:

- Deferred Income Analysis/Spread
- Deferred Income Audit Trail (Crystal)
- Deferred Income Detail (Crystal)
- Deferred Income Matrix Summary (Crystal)

Deferred Income Analysis/Spread

Provides a projection of how the current balances in deferred income will be recognized in each future period. This is an important management report.

Deferred Income Audit Trail (Crystal)

Provides a report on the income that was recognized, as well as the deferred income balance that remains at the end of the reporting period. This report is designed to run for a specific monthly period (any month for which the GL interface has already been run). The report is designed as an audit trail report to simulate the income that was recognized, as well as the deferred income balances that remain at the end of the reporting period.

> **Note:** Note: This report is generated using the specified End Date. Only transactions equal to or less than the report's End Date are included. It is important to always enter the last day of the month.

This report is based on deferred income transactions for which the deferral/recognition timeframe is still in effect as of the beginning of the month being reported on (residual income is yet to be recognized either during the report month and/or in a future month).

This report simulates the process that iMIS uses to generate the deferral to income transfer entries with one exception. It depicts the income recognition at the individual detail transaction level, as opposed to the matrix summary level that iMIS uses to generate the actual entries. As a result, the reported income amounts will most likely be different from

the actual amounts by small rounding differences. Nonetheless, the report should give a close approximation of the actual transfer amounts per month as well as the residual balance at the end.

This report is structured as follows:

- The report is based on all transactions dated on or before the reporting end date that have been posted to the deferred income matrix.
- The transactions are grouped, sorted, and subtotaled by the four key deferral matrix elements (deferral account, income account, begin date, and term).
- For identification and cross reference, the Trans #, Trans Date, Bill To ID, Bill To Name, and Product code are listed.
- The transaction amount is listed and subtotaled at the matrix summary level. This subtotal should agree with the original amount on the Deferred Income Matrix Summary report as of the end date of the report (the sign is shown as positive instead of the normal credit balance for easier use of the report).
- For each detail line, the monthly transfer column will show the portion of the income that should have been transferred during the reporting month. In most cases, if the begin date is equal to or less than the reporting period, this will be the transaction amount divided by the term, with appropriate rounding. In some cases, the amount may be more if the transaction date falls within the reporting date and the deferral begin date was within an earlier period. In this case, iMIS works in a catch-up mode on income that needs to be recognized by the reporting date. If the reporting period is the last period within the deferral term, the amount may be smaller or larger to account for any cumulative rounding differential. The transfer amount is summarized at the matrix level and is also subtotaled for each income account. The actual transfer amount can be compared to the total income from transfer for the reporting period.

  Note: If the actual transfer amount differs substantially from the report amount, this may be due to timing issues where the income for certain transactions was not recognized because a future month's GL interface was processed before the affected transactions were processed through an interface cycle.

- The Months Remaining in the deferral term beyond the reporting month is shown for each transaction.
- The deferred income Amount Remaining is shown at the individual transaction level, matrix summary level, and the Total amount by the deferred GL account. It can be compared to the GL balance and/or the Deferred Income Matrix Summary report as of the end of the reporting month. Again, due to the detail basis of the report, this balance will only be an approximation, which may be off by a rounding difference.

  Deferred Income Detail (Crystal)

  Provides a report of transactions to be posted to deferred income. Transactions are sorted by deferred income account, regular income account, beginning date, and term. This report should be printed prior to running the GL interface procedure. Verify the accuracy of the data and make modifications as needed before running the GL interface.

  Deferred Income Matrix Summary (Crystal)

  Provides a current status of the deferred income matrix table and shows the totals that were originally posted to deferred income, how much has been recognized to date, and the amount that remains to be recognized in future months. This report should be printed after each GL interface. The remaining amounts should tie to the deferred income balances in the General Ledger. Save this report and use it as a backup for deferred income transfer entries.

Multiple Entity Processing

iMIS can separate and process transactions for multiple financial entities (or funds) as long as the entities share a common iMIS database.

Each financial entity must maintain a separate set of financial records and must be configured as a separate organizational entity in iMIS.

By default, iMIS uses single-entity processing, but you can use multi-entity processing by configuring the following items:

1. Define the entities (see "Defining an organizational entity") for which you need to keep separate financial records.
2. Enable multi-entity processing in the AR/Cash Set up module window (see "Enabling multi-entity processing").
3. Define default accounts (see "Defining default general ledger accounts") for your entities.
4. Set up cash accounts (see "Setting up cash accounts") for your entities.
5. Set up Due To/Due From processing (see "DueTo/DueFrom processing").

   See the appropriate procedures in the AR Cash guide for configuration details.

Enabling multi-entity processing

Use the Set up module window to enable multiple entities. See the AR/Cash Administration section for help with the Set up module window for AR/Cash.

To enable iMIS multiple-entity processing

1. From AR/Cash, select Set up module to open the AR/Cash Set up module window.
2. Click Edit.
3. Select the Multiple Entities checkbox to process transactions for two or more independent entities (and sets of books).

   Default account fields are activated when you check the Multiple Entities checkbox.
4. (optional) Enter the default entity codes for each iMIS module, or click the lookup icons to select from defined entity codes.

   Note: You only need to enter entity codes for modules whose entity codes are different from the system default organization code.
5. Click Save.

DueTo/DueFrom processing

If you use one entity's cash account to receive income meant for a different entity, you must set up DueTo/DueFrom accounts to ensure that your accounting records are

correct.

Correcting balancing problems

iMIS generates DueTo/DueFrom entries for configured entity relationships when transactions are sent to the general ledger. These entries correct balancing problems created by entities receiving cash for which they do not have matching income, and entities receiving income for which they do not have matching cash.

Due to owner entity

This liability entry is created for the entity that owns the cash account that received the money but is not entitled to the income. This liability entry offsets the cash the entity received but did not own.

Due from cash entity

This receivable entry is created for the entity that owns the income to make up for the asset it is entitled to but did not receive.

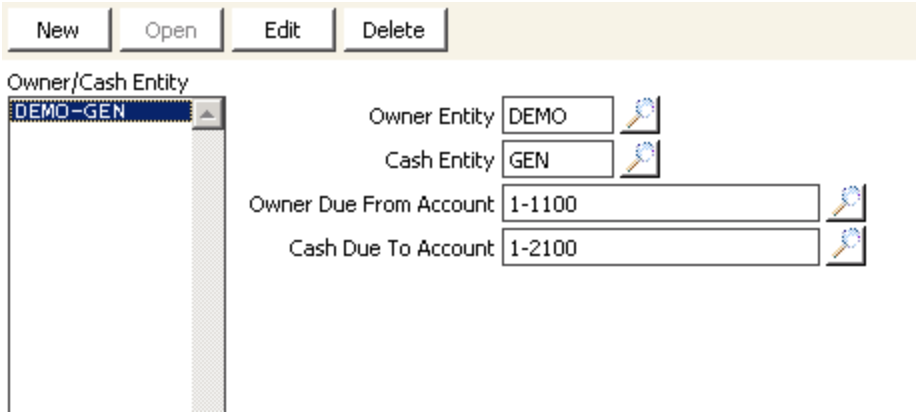
Setting up DueTo/DueFrom accounts

DueTo/DueFrom accounts are set up in the Set up DueTo/DueFrom window. Create one entry for each multiple-entity combination where cash will be received by one entity for a transaction that belongs to a different entity.

Set up due to/due from window

The Set up due to/due from window enables you to define the DueTo/DueFrom relationships between your general ledger accounts.

In this window, you can set up entries for each multiple-entity combination in which cash is received by one entity for transactions that belong to another entity.



Admin Console: Accounting > Options > Set up tables > Set up due to/due from
Desktop: AR/Cash > Set up tables > DueTo/DueFrom

Owner/Cash Entity

Lists Due To/Due From accounts specifying the source entity and the destination entity.

Owner Entity

Specifies the entity that owns the income.

Cash Entity

Specifies the entity that owns the cash account for the cash received.

Owner Due From Account

Specifies the receivables account number for the entity that owns the income (debit).

Cash Due To Account

Specifies the liability account number for the entity that received the cash (credit).

To set up Due To/Due From accounts

1. From Set up due to/due from window, click New.
2. Enter the Org Code for the entity that owns the income or accounts receivable in the Owner Entity field, or use the lookup icon to select a value.

3. Enter the Org Code for the entity that received the cash in the Cash Entity field, or use the lookup icon to select a value.
4. In the Owner Due From Account field, enter the GL account in which to record the inter-company receivable (debit) transaction for the entity that owns the income, or use the lookup icon to select a value.
5. In the Cash Due To Account field, enter the GL account in which to record the inter-company payable (credit) transaction for the entity in which the cash account resides (cash entity), or use the lookup icon to select a value.
6. Click Save.

Determining transaction entity ownership

Each transaction generated within iMIS is made up of two or more transaction entry lines. Each individual transaction line can be one of the following:

- a cash line, representing a cash payment or reversal
- a distribution line, typically representing an entry to income
- an AR line, normally representing an offset to the accounts receivable account

A due to/due from (see "DueTo/DueFrom processing") situation arises when there is a difference between the entity assigned to the cash line (for example, representing the cash account into which the funds are deposited) and the entity assigned to either a distribution/income or AR line within the same transaction.

The accounts to which transaction lines are assigned depends on the iMIS module and on iMIS configuration options.

Entity processing in Billing

Cash Line

Batch control disabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any

2. The default entity for Billing, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for Billing, if any
2. The overall system default entity

Batch control enabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for Billing, if any
4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for Billing, if any
3. The overall system default entity

Distribution/Income Line

Entity ownership is determined in the following order:

1. The default entity for Billing, if any
2. The overall system default entity

AR Line

Entity ownership is determined in the following order:

1. The default entity for Billing, if any
2. The overall system default entity

Accrual Dues with Multi-Entity enabled

The income for accrual dues items is recorded using the following hierarchy:

1. The designated entity for that product, if any
2. The Dues default entity, if any
3. The overall system default entity

Cash Dues with Multi-Entity enabled

When a cash dues payment is made, the income for the payment is recorded using the following hierarchy:

1. The Dues product entity, if any
2. The Billing module entity, if any

- The overall system default entity

Entity processing in Events and Exhibition

> **Note:** Note: A Due To-Due From situation can occur when a payment is entered for an event registration or exhibition order and the batch or credit card cash account entity does not match the event income entity.

Cash Line

Batch control disabled

For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The default entity for the module, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for the module, if any

2. The overall system default entity

Batch control enabled

For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for the module, if any
4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for the module, if any
3. The overall system default entity

Distribution/Income Line

The income entity for an Events function is designated by the most specific income entity defined. For example:

1. The entity defined on the Event Function Detail window, if any
2. The entity defined on the Define an event window, if any
3. The default Meeting/Events entity, if any
4. The overall system default entity

The income GL account recorded in the Trans table for event function DIST lines is determined in the following way:

1. The account specified in the Event function detail > Fees window, if any
2. The default income account of the function's fund, if any
3. The default income account of the event's entity, if any

4. The income account of the default meeting entity, if any
5. The default income account for the default system entity.

AR Line

Entity ownership is determined in the following order:

1. The default entity established for the meeting or exhibition, if any

Note: The entity is assigned to the Invoice related to the meeting registration or exhibition order when the registration or order is initially entered.

2. The default entity for the module, if any
3. The overall system default entity

Entity processing in Exposition

Cash Line

Batch control disabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The default entity for Expo, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for Expo, if any
2. The overall system default entity

Batch control enabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for Expo, if any

4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for Expo, if any
3. The overall system default entity

Distribution/Income Line

Entity ownership is determined in the following order:

1. The default entity for the exposition, if any
2. The default entity for Expo, if any
3. The overall system default entity

AR Line

Entity ownership is determined in the following order:

1. The default entity for the exposition, if any
2. The default entity for Expo, if any
3. The overall system default entity

Entity processing in Fundraising

Cash Line

Batch control disabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The default entity for Fundraising, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for Fundraising, if any
2. The overall system default entity

Batch control enabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for Fundraising, if any
4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for Fundraising, if any
3. The overall system default entity

Distribution/Income Line

Entity ownership is derived from the Fund assigned to the related gift or pledge Distribution.

AR Line

Entity ownership is derived from the Fund assigned to the related gift or pledge Distribution.

Entity processing in AR/Cash - Sales Transactions and Simple Order Entry

Cash Line

Batch control disabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any

2. The default entity for AR/Cash, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for AR/Cash, if any
2. The overall system default entity

Batch control enabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for AR/Cash, if any
4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for AR/Cash, if any
3. The overall system default entity

Distribution/Income Line

Batch control disabled - Entity ownership is determined in the following order:

1. The default entity for AR/Cash, if any
2. The overall system default entity

Batch control enabled - Entity ownership is determined in the following order:

1. The cash account entity specified, if any, in the batch in which the transaction or order is entered

2. The default entity for AR/Cash, if any
3. The overall system default entity

AR Line

Batch control disabled - Entity ownership is determined in the following order:

1. The default entity for AR/Cash, if any
2. The overall system default entity

Batch control enabled - Entity ownership is determined in the following order:

1. The cash account entity specified, if any, in the batch in which the transaction or order is entered
2. The default entity for AR/Cash, if any
3. The overall system default entity

Entity processing in Orders

For both regular order processing and credit/debit orders, refer to iMIS Orders for information on entity ownership.

Entity processing in Credit Memo or Debit Memo/Adjustment Transactions

Distribution/Income Line

Uses the owner entity of the original order that is being adjusted

AR Line

Uses the owner entity of the original order that is being adjusted

Entity processing in AR/Cash - Cash Receipts

Cash Line

Batch control disabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any

2. The default entity for AR/Cash, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for AR/Cash, if any
2. The overall system default entity

Batch control enabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for AR/Cash, if any
4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for AR/Cash, if any
3. The overall system default entity

Distribution/Income Line

Not applicable

AR Line

For a payment on an existing open item, uses the owner entity of the original item being paid.

For a credit card payment for a newly created Prepaid Credit Balance item if batch control is disabled, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any

2. The default entity for AR/Cash, if any
3. The overall system default entity

For a non-credit card payment for a newly created Prepaid Credit Balance item if batch control is disabled, entity ownership is determined in the following order:

1. The default entity for AR/Cash, if any
2. The overall system default entity

For a credit card payment for a newly created Prepaid Credit Balance item if batch control is enabled, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for AR/Cash, if any
4. The overall system default entity

For a non-credit card payment for a newly created Prepaid Credit Balance item if batch control is enabled, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for AR/Cash, if any
3. The overall system default entity

Entity processing in Service Central - Enter and edit payments

Cash Line

Batch control disabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The default entity for Service Central, if any
3. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The default entity for Service Central, if any
2. The overall system default entity

Batch control enabled - For a credit card payment, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for Service Central, if any
4. The overall system default entity

For a non-credit card payment, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for Service Central, if any
3. The overall system default entity

Distribution/Income Line

Not applicable

AR Line

For a payment on an existing open item, uses the owner entity of the original item being paid.

For a credit card payment for a newly created Prepaid Credit Balance item if batch control is disabled, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The default entity for Service Central, if any
3. The overall system default entity

For a non-credit card payment for a newly created Prepaid Credit Balance item if batch control is disabled, entity ownership is determined in the following order:

1. The default entity for Service Central, if any
2. The overall system default entity

For a credit card payment for a newly created Prepaid Credit Balance item if batch control is enabled, entity ownership is determined in the following order:

1. The entity assigned to the credit card cash account, if any
2. The cash entity specified in the batch, if any
3. The default entity for Service Central, if any
4. The overall system default entity

For a non-credit card payment for a newly created Prepaid Credit Balance item if batch control is enabled, entity ownership is determined in the following order:

1. The cash entity specified in the batch, if any
2. The default entity for Service Central, if any
3. The overall system default entity

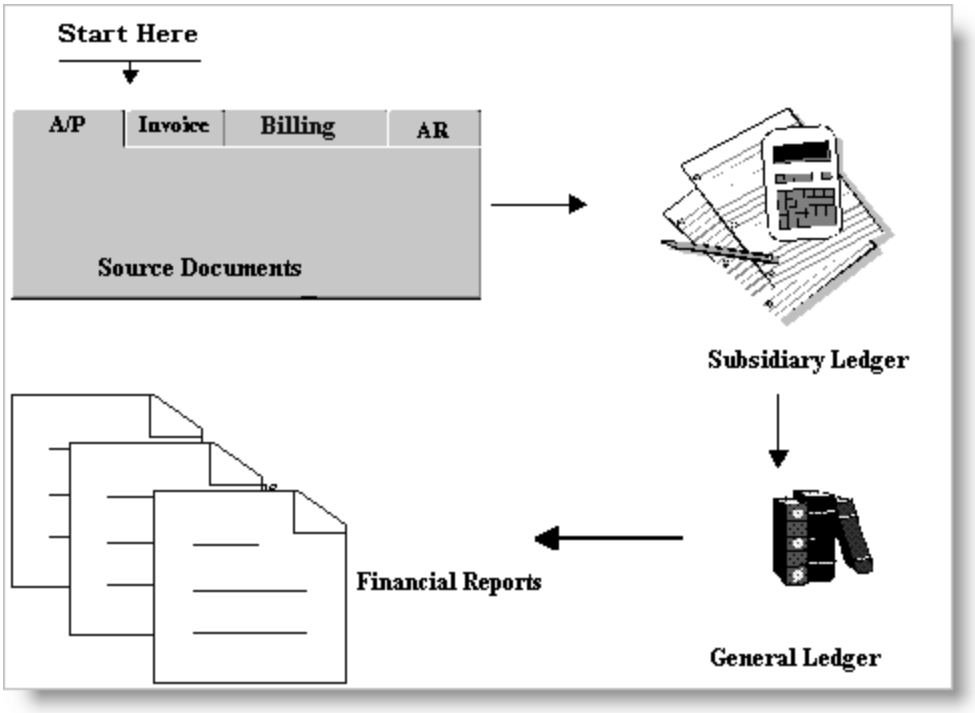
AR/Cash

Accounts Receivable and Cash Receipts Overview

The Accounts Receivable and Cash Receipts (AR/Cash) feature provides the central cash receipt and accounts receivable tracking utility for the entire integrated iMIS system. All accounting-related entries generated by iMIS (through Billing, Events, and so forth) flow through and are managed by AR/Cash. You can also enter other sales, cash receipt, and adjusting entries directly through AR/Cash.

Reviewing the AR/Cash process

The following diagram illustrates how iMIS processes the flow of accounting transactions:



The AR/Cash Process

The flow of accounting transactions includes the following:

- iMIS generates detailed accounting transactions based on the recording of source documents.

- Transactions generated from the source documents are posted to create and update open item balances. The balances that are added together form the accounts receivable subsidiary ledger total.
- Transactions that have been posted are automatically transferred to your third-party General Ledger (GL) through the optional iMIS AR/Cash system or GL interface to produce reports.

  Designed for non-accountant use

  Although iMIS contains a solid accounting foundation, the AR/Cash interface is designed for users who have little or no prior accounting knowledge.

  While all iMIS data entry facilities generate accounting transactions to fit the situation, those users entering the data do not need to be aware of the structure and accounting signs (debits and credits) for those transactions. Detail transaction reports print with natural (as opposed to true accounting) signs for easy examination by non-accounting personnel.

  Note: Crystal reports contain credit and debit columns.

  GL account numbers are only entered in the AR/Cash System Setup areas, so those entering data do not need to be concerned about these account numbers. Instead, users select from logical, abbreviated product codes during their normal transaction processing.

  Flexible processing for cash receipts

  A number of flexible features provide for efficient entering of cash receipts (payments), including the following:

- Account against open receivables
- Sales/income transaction (such as payments that accompany orders and registrations)
- In advance of any application (such as prepaid and unidentified cash receipts)
- Processing cash, check, and credit card receipts as needed (on the Set up cash accounts

window, establish which, if any, credit cards to accept)

- Multiple cash accounts

  Optional batch control

  Batch control groups your transactions, giving you more control over the data entry process. Batch control features include:

- Designating user- or system-assigned batch numbering
- Assigning separate batches for different deposits, entry types, or users
- Selecting a different cash account for independent batches
- Monitoring ongoing data entry results against pre-established cash and optional transaction count controls
- Assigning consistent, automatic batch numbers and transaction dates to each transaction entered in an open batch
- Checking transactions and totals with separate batch transactions reporting
- Finalizing all batch transactions on posting/closing the batch

  Immediate or hot posting

  Immediate or hot posting of transactions lets you instantly see the results of transactions as you enter them. Immediate or hot posting is a built-in feature within iMIS when batch control is not enabled. It is also the default setting when batch control is enabled. For more information, see Setting up Batch Control.

  As soon as you enter a transaction, iMIS updates customer accounts and creates any sales activity/history records. Sales orders entered through the simple or full-order entry utility update accounts and history when you print the invoices.

  Entries made on the Enter and edit transactions windows allow immediate or hot posting when:

- Deleting a transaction and iMIS reverses the effects of the initial posting, and reverses the updating of the AR/Cash open item and removes the related sales activity/history records.
- Modifying a transaction and iMIS adjusts the posted results (AR/Cash open items and sales activity/history records) according to the changes you made.

Simple order entry subsystem

The simple order subsystem enables you to produce high-quality invoice documents for miscellaneous sales, including publications, advertising, and labels. The additional features allow you to perform the following tasks:

- Use one invoice-style order-entry window, which supports data entry, data editing (until the invoice is printed), and inquiries
- Override Ship To ID, name, and address information
- Enter multiple order line items and comment lines
- Enter and separately track freight and handling amounts
- Automatically calculate sales tax through the sales tax codes assigned to each order
- Print invoices in a variety of formats with optional user-defined standard messages

Note: See the iMIS Authorized Forms Catalog for examples of many high-quality printing document formats.

Reporting features

These features provide for multi-transaction audit trail selections in addition to traditional aging and customer statement options.

Multiple levels of detail and summary transaction reports are available, from detailed batch or daily transaction reports to month-end GL account-oriented detail and full summary options.

Aging and customer statement options involved in reporting include the following:

- Defining aging groups (length and labels) according to your organization's tracking requirements
- Creating a hard-copy AR/Cash statement format with a variable message to fit the age categories
- Set search parameters for reports using the runtime flexibility

Multiple-entity support

This support allows processing of transactions for two or more independent entities (and sets of books). iMIS also generates intercompany Due To-Due From entries if funds from multiple entities (see "Multiple Entity Processing") are deposited into a shared cash account.

Batch Control

iMIS batch control enables you to segment and control the reporting of accounting transactions. You can establish any number of transaction batches. For example, many organizations open a batch for each deposit or open batches by day or by user. Batch numbering, viewing, posting, and other options are configured by your administrator (see "Setting up batch control").

When batch control is in effect, the Transaction Ledger window appends the batch number to the end of the Description field for each line item.

Benefits of batch control

- Groups and reports transactions by batch
- Allows entry and monitor control totals
- Supports any number of open batches
- Supports any number of users entering transactions into any given batch (for deposit-oriented batch control)
- Supports multiple cash accounts
- Assigns a batch date to each transaction entered (minimizing date override errors)

Uses of batch control

- Payment control
- Bank deposit reconciliation
- Grouping transactions by:
- Deposit (good audit trail support)
- Data entry operator
- Department
- Transaction type
- User-preferred methods
- Module

Where batch control is required

- Multiple cash accounts
- Multiple entities (Due To-Due From processing)
- Accrual billing

Viewing unposted transactions

If your administrator has selected this option (see "About marking unposted transactions"), unposted transactions created with batch control in effect can be identified as unposted on the AR/Cash area of the Manage customers window and on all Transaction Ledger windows.

To view unposted transactions

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find.
3. Enter the customer ID and press Enter.

4. Select the AR/Cash tab to view the customer's AR/Cash information. (U) is displayed in the column to the left of the Ref Num.
5. Double-click an invoice to open the Transaction Ledger window.
6. The window, as well as the columns in the window, can be resized.
7. Any unposted transactions are marked (U). The description fields are appended with the batch numbers.
8. Click OK to close the window.

Examples of unposted transactions

The following is an example of how transactions are marked unposted.

1. Create an invoice for a customer with batch control enabled.
2. View the customer's AR/Cash tab. There is a (U) displayed to the left of the reference number for the unposted transaction.
3. View the customer's Transaction Ledger window for this transaction.
4. Post the batch.
5. View the customer's AR/Cash tab. There is no longer a (U) mark to the left of the reference number for the transaction.
6. View the customer's Transaction Ledger window for this transaction. After the batch is posted, the (U) is removed from the descriptions for transaction number 99.
7. Enter a payment against this invoice in a separate batch.
8. View the customer's AR/Cash tab. There is a (U) to the left of the reference number for the line item with the unposted transaction.
9. View the customer's Transaction Ledger window. Notice that only the AR line for the payment is marked (U), and that the original invoice lines are not marked (U).
10. Post the batch.

11. View the customer's AR/Cash tab. There is no longer a (U) mark next to the reference number for the transaction.
12. View the customer's Transaction Ledger window. Notice that the original invoice and the payment are no longer marked with a (U).

Working with batches

The Manage batches window enables you to perform several different batch functions:

- Create new batches
- View/list existing batches
- Control which batches display on the window
- Print and post existing batches

Note: If iMIS is configured to hide batches created by other users, you can view only your own batches, unless your logon's authorization level for AR/Cash is 8. This restriction applies to batches that are created automatically by iMIS or by importing transaction data.

Manage batches window

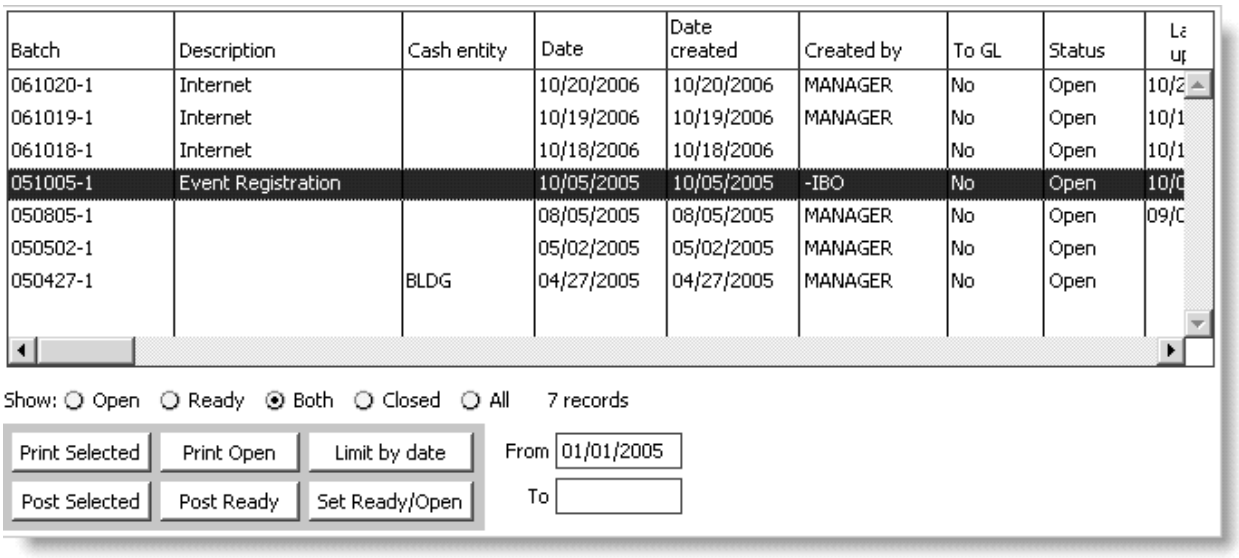
This window displays a table of the batches that are available to you and the commands for editing and managing them. The authorizations (see "Authorization level privileges (Desktop)") and credentials of each user record control what aspects of this feature can be seen and used.

Note: The batches that are available to you depend upon the authorization level and access keywords assigned to your login, and the batch control options that the administrator has selected for your site.

Note: The Manage batches and Open Batches windows are equivalent. The Manage batches window appears only in AR/Cash. The Open Batches window appears when (a) you are in an iMIS module other than AR/Cash and (b) no open batch is selected when you attempt to enter or edit a transaction.

Note: System-generated batches are designed to be posted unmodified. When you edit a system-generated batch, or add transactions to a system-generated batch, you must designate a cash account for the batch before your changes can be saved, and before the batch is posted.

Note: Window items that are self-explanatory for the typical users of this window are not described.



The Manage batches window batch table and controls

Batch table

This table displays the batches that are available to you. You can sort the batch table by clicking on the column headings. The batch table includes these columns:

- Date - Specifies the transaction date of the batch.
- Date created - Specifies the date that the batch was created.
- To GL - Specifies whether at least one transaction in the batch has been exported to the General Ledger.
- Last updated - Specifies the last date that a change was made to the batch status or transactions in the batch.

- Meeting - (if enabled) Specifies whether the batch is closed when the corresponding meeting is closed.

  If the table contains too many batches to view easily, filter the table with the display controls.

  Batch table display controls

- Both - Displays both open and ready batches
- Closed - (if enabled) Displays only closed/posted batches
- All - (if enabled) Displays all of the batches that are available to you
- Limit by date - Displays only batches with creation dates that fall between the dates in the From and To fields

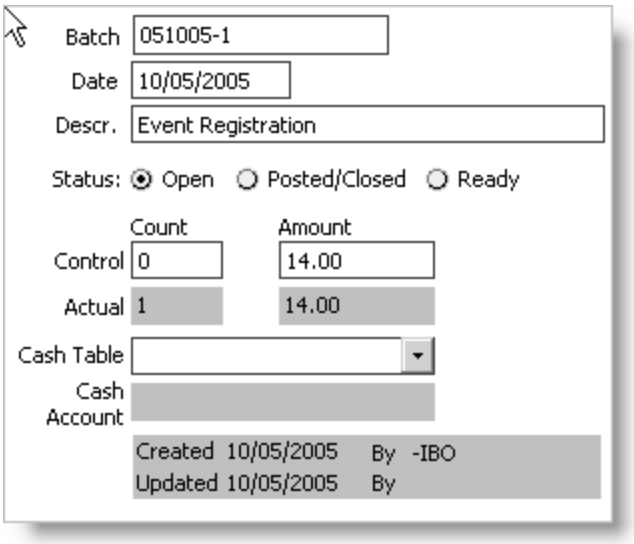
  Batch controls

- Print Open - Prints a transaction report for all open batches
- Post Selected - Posts the selected batch

  Note: To post a batch, the sum of all transaction debits in the batch must equal all transaction credits. In addition, your login must have an authorization level of 4 or higher.

- Post Ready - Posts all ready batches
- Set Ready/Open - Changes the status of the selected batch from open to ready, or from ready to open
- View Batch - Displays the Batch window, which remains open in the area below the task list when you switch to different iMIS modules.

  Batch creation/editing



The Manage batches window data edit/entry area

- Batch - (read-only, unless batch auto-numbering is not enabled) The unique identifier of this batch. (if no auto-numbering) For new batches, you must specify this identifier (maximum: 15 characters).
- Date - The accounting date of all transactions in this batch. For new batches, the default is the current system date.
- Descr - The description of this batch (maximum: 60 characters).
- Status - (read-only, except authorization level 8) The status of this batch.
- Open - Entry/editing/balancing of data is in progress. Authorized users are allowed to add or modify transactions in this batch, and to change the status to Ready.
- Posted/closed - All entry/editing/balancing of data is finalized. No users are allowed to modify transactions in this batch but authorized users can change its status to Open or Ready.
- Ready - Temporary transition between Open and Posted/closed. A batch should only be marked Ready if it is balanced and ready for posting individually or in a group. No users are allowed to modify transactions in this batch but authorized users can change its status to Open or Posted/closed.
- Control Count - The maximum number of transactions this batch can contain.

- Actual Count - (read-only) The current number of transactions in this batch.
- Control Amount - The total value of cash receipts or deposits that can apply to this batch. This enables you to validate the batch balance after data entry.
- Actual Amount - (read-only) The current total value of all transactions in this batch. As you enter transactions, the system keeps an internal count of accumulated transactions.
- Cash Table - The cash account code to which all cash receipts in this batch are assigned.

  Note: This field is required for all user-created batches, even if you only have one cash account, and even if you do not process any cash receipt transactions in this batch.

  Note: If you edit a batch to change the cash account, only receipts entered after you save will reflect the new account and associated GL account information.
- Cash Account - (read-only) The GL account associated with the selected Cash Table value.

  To create a new batch

1. From AR/Cash, select Manage batches.

   The Manage batches window opens.
2. Click New.
3. Enter the batch information.

   Note: You must designate a cash account type in the Cash Table field before you can save a new batch.
4. Click Save.

Selecting an open batch

If you enable batch control, a batch must be selected before you can process transactions. If you do not select a batch after starting an iMIS session, the Open Batches window opens automatically when you attempt to insert or edit a transaction, so that you can

select an open batch. After you select an open batch or create a new batch, the batch remains selected until you select a different batch or exit iMIS.

You can only edit transactions for the currently selected batch. If you try to edit a transaction that was entered in another batch, iMIS prompts you to switch to the originating batch.

To select an open batch

1. From AR/Cash, select Manage batches.
2. In the batch table, double-click a batch to select it.
3. (optional) Click View Batch.

   The Batch window opens, in the lower-left corner of the page.
4. Close the Manage batches window.

To find a specific open batch

1. From AR/Cash, select Manage batches.
2. Click Find.

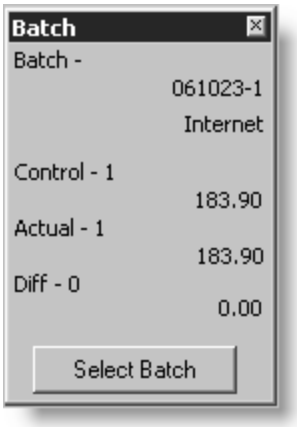
   The Batch field becomes available for data entry. All other fields remain unavailable.
3. Enter as many characters as required to identify the batch.
4. Press Tab.

   iMIS highlights the first batch that matches the characters entered.
5. Repeat steps 3 and 4 as desired.
6. Click Save.

   iMIS cancels the find and populates the fields on the right side with the highlighted batch's data.

Batch window

The Batch window displays information about the current open batch, and provides a button for selecting a different open batch.



From the Manage batches/Open Batches window, click View Batch

This window specifies the following information.

- Batch - The name and description of the current open batch
- Control - The control count and control amount
- Actual - The actual count and actual amount
- Diff - The differences between the control and actual values
- Select Batch - Displays the Open Batches window

To print batches

After you have entered all of the transactions for a batch or group of batches, click Print Selected or Print Open to print the batch transaction report, where you can review the batch details and check the batch balancing

1. From AR/Cash, select Manage batches to open the Manage batches window.

- To print a report for a selected batch, select the batch and click Print Selected.
- To print reports for all open batches, click Print Open.

The batch report lists the detail of each transaction entered and lets you compare the actual figures against the control totals, warning you if they are different. The report also provides a GL accounting summary report.

Posting batches

After you finish your batch transaction work and have verified that the information is accurate and in balance, complete the process by posting the batch. Until you post the batch, you can make changes edit or delete any transaction within the batch (even if you are using the hot posting feature).

Note: If your administrator has selected Require Balanced Batches for Posting (see "AR/Cash Batch Control window"), iMIS will not post a batch unless both the control amount equals the actual amount, and the control count equals the actual count. When you click Post Ready or Post Selected on the Manage batches window and a batch is unbalanced, iMIS displays an error message and does not post the batch.

To post a single batch

1. From AR/Cash, select Manage batches to open the Manage batches window.
2. Select the batch to be posted.
3. Click Post Selected.

   A warning window asks you to confirm that you want to post the batch.
4. Agree to post the batch.

   For each batch posted, iMIS prints the final detail and summary batch transaction report and marks the batch as Posted or Closed.

   Note: After a batch is closed, you cannot add, modify, or delete any transactions in that batch.

To post a group of batches

1. From AR/Cash, select Manage batches to open the Manage batches window.
2. Choose the Show: Both option beneath the batch list.

This will filter the batches to show only those with an Open or Ready status. Ready batches are ready for posting.

3. Ensure that any batches you want to post have a status of Ready:

- Select an Open batch.
- Click Set Ready/Open.
- Repeat for each Open status batch that you want to post.

4. Ensure that any batches you do not want to post do not have a Ready status:

1. Select a Ready batch.
2. Click Set Ready/Open.
3. Repeat for each Ready batch that you do not want to post.
4. Click Post Ready.

   A warning window asks you to confirm that you want to post the batches.

6. Agree to post the batches.

   All batches with a Ready status are posted.

Simple Orders

The Enter and edit orders window has many of the same fields as the Enter and edit sales transactions window. In addition, the Enter and edit orders window provides the following capabilities:

- Allows for adding new Bill To Id customer records, if the Bill To Id (name and address) is not already in the customer database
- Allows for a separate Ship To ID and/or address
- Tracks freight and handling charges
- Calculates tax (which defaults to either the tax authority established for the Bill To Id, if any, or to the state abbreviation identified in the Ship To address

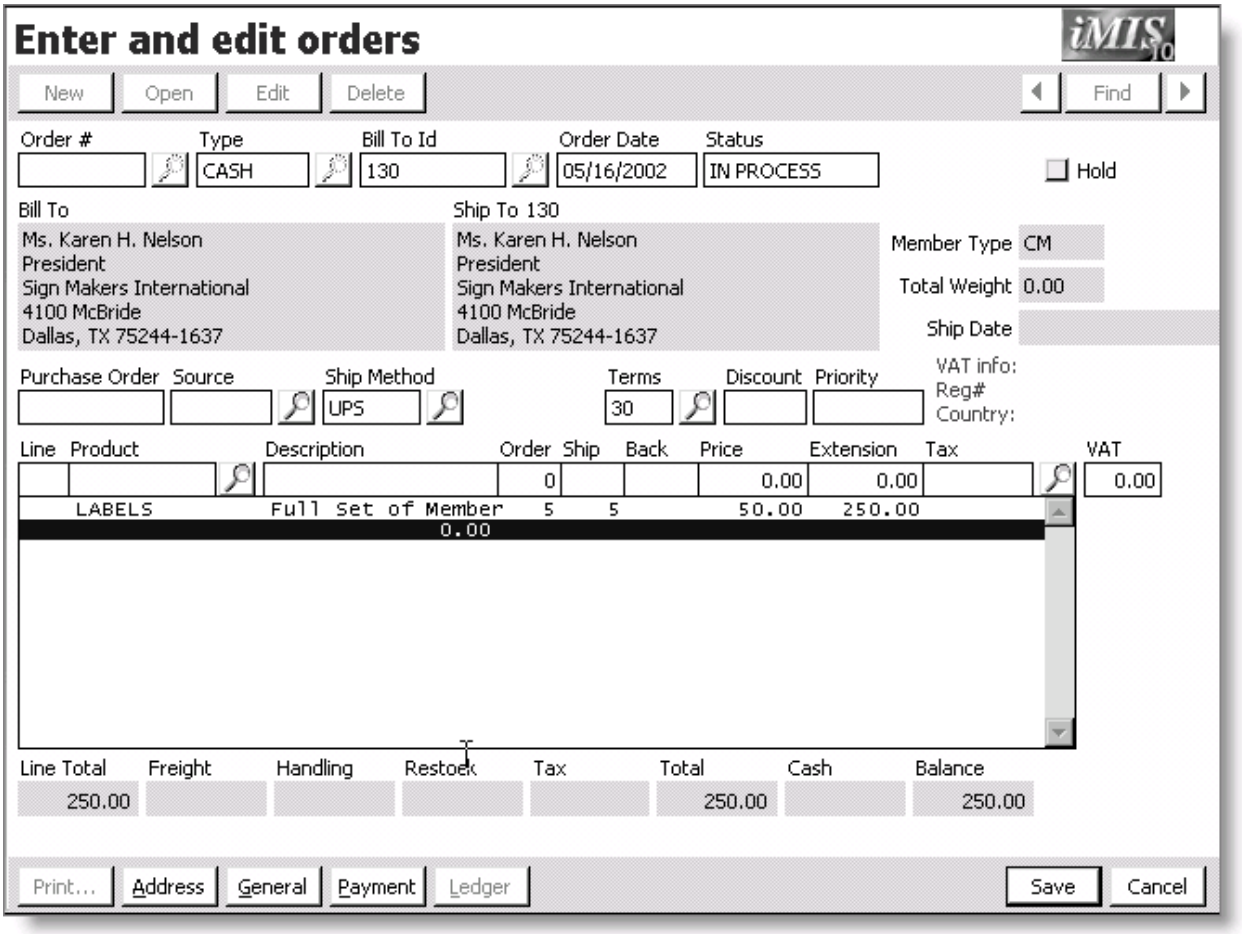
Most of the fields on the Enter and edit orders window provide a standard lookup window. To use the Lookup feature, use the lookup icon on the field.

Processing payment amounts

iMIS processes payment entries whether payment is made by check or credit card.

- No payment entered - The full amount of the sales order is an open receivable.
- Payment in full entered - No open AR item is tracked through the system.
- Partial payment entered - Offsets or reduces the AR amount.

Enter and edit orders window - Simple order entry



From AR/Cash, select Process orders > Enter and edit orders

Previous

Select to move back through the list of transactions in the Transaction List field.

Order #

The system automatically enters the order number when an order is entered. You can specify an order number in this field when searching for a specific order that was previously entered.

Type

The only Type available in Simple Order Entry is CASH.

Bill To Id

Enter the customer ID to whom this order will be billed, or use the lookup icon to select a value.

If you leave the Bill To Id field blank, a blank Order Entry - Add New Member window displays where you can enter the Customer Type, name, address, and phone number for a new customer.

Order Date

The system automatically defaults to the current system date. You can override this date by selecting the field and entering the date.

Status

The system automatically defaults to the current IN PROCESS status.

Hold

Only applies in the iMIS Full Order Entry module.

Bill To

The Bill To information defaults to the preferred billing address in the customer's record and cannot be modified (updated or changed).

Ship To

(optional) The Ship To information defaults to the preferred shipping address in the customer's record. You can modify the Ship To ID and/or address.

Note: You can modify the customer's Ship To ID or address by clicking the Address button located at the bottom of the Enter and edit orders window.

Member Type

(read only) Customer type.

Total Weight

(read only) Total shipping weight.

Ship Date

Only applies in the iMIS Full Order Entry module.

Purchase Order

If the customer provides a purchase order or other reference number that should appear on the invoice, then enter that number (or alphanumeric combination) in this field or Tab past this field.

If you would like a brief description to display on the AR statement, you should enter that description here when a purchase order number is not given (maximum number of characters = 15).

Source

Optional unless Force Source Coding is enabled on the Customer Setup - Basic Options window (from Customers, select Set up module > General, and click Basic Options).

Using this field may be valuable in tracking a code for an advertising or marketing program. Use the lookup icon to select a value.

All valid Source code options must be added to the SOURCE_CODE table on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation, and select SOURCE_CODE from the drop-down list).

Ship Method

Specifies the desired ship method; the system default ship method is UPS. You can accept the default, enter the desired ship method, or use the lookup icon to select a value.

Note: You can only use a defined ship method. To define a ship method, from Customers, select Set up tables > General lookup/validation to display the Set up general look-up/validation window. Select SHIP_METHOD from the drop-down list and click New. Enter the new ship method Code, Expansion (optional), and Description (optional), and then click Save.

Tax Auth

The system defaults to the tax authority defined in the Default Tax field (from Customers, select Manage customers, open a customer record, press the Financial tab, and select a value from the Default Tax drop-down list) or to the State/Province Code on the Ship To address, if the field is not blank.

(optional) To override the code, use the lookup icon to select a value.

Terms

The Terms code typically represents the number of days from the invoice date that a customer has to make a payment on the order. The description related to the Terms code prints on the invoice document. Use the lookup icon to select a value. Terms are defined in the Set up terms window (from AR/Cash, select Set up tables > Terms).

Discount

Applies in the Full Order Entry module only. The system bypasses all these fields and goes directly to the Product field.

Priority

Applies in the Full Order Entry module only. The system bypasses all these fields and goes directly to the Product field.

Ship Date

Applies in the Full Order Entry module only. The system bypasses all these fields and goes directly to the Product field.

Line

Displays the line number of the currently selected line item.

Product

Repeat data entry for all products and/or comment lines that are associated with the order.

Enter a Product, or use the lookup icon to select a value.

Note: If you leave the Product field blank, you can enter a comment in the Description field; this comment will be printed on the invoice document.

Description

The system automatically fills in the Description for the product. You can click in the Description field and make changes if needed.

Order

Enter the quantity of the requested product.

Ship

Automatically populated with the value entered in the Order field.

Back

Applies in iMIS Full Order Entry module only.

Price

After you enter the order, iMIS defaults to price and automatically fills in the product's unit price if a price has been defined in the Set up products window (from AR/Cash, select Set up tables > Products). You can override the Price field manually by selecting the field and reentering the price.

Extension

The system calculates the Extension by multiplying the Quantity order by the Unit Price.

Line Items

Displays the Line, Product, Description, Order, Ship, Back, Price, and Extension information for each line item.

Line Total

System display-only field (price X extension = line total)

Freight

(read only) The cost for shipping the product

Handling

(read only) The cost for handling the product

Restock

(read only) The cost for restocking the product

Tax

(read only) The tax on the product

Total

(read only) After you enter the Freight and Handling charges on the Order Entry - General Information window, the system recalculates and displays the value in the Balance field (line total + freight + handling + tax = total).

Cash

(read only) The payment amount

Balance

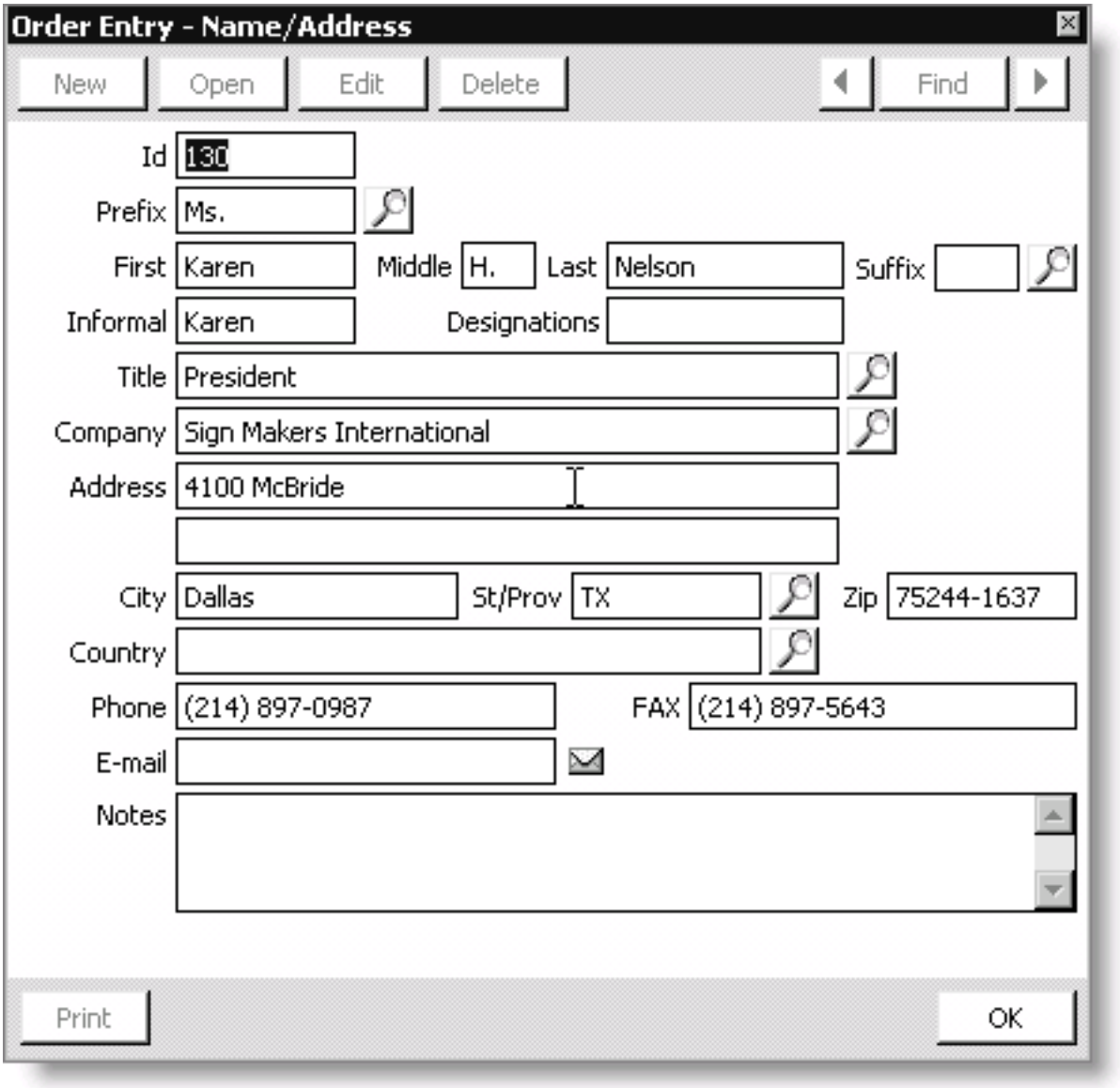
(read only) The remaining balance

Print

Opens the Select Report window, where you can select Order to print an Order detail or Invoice to print an Invoice and to mark the order complete.

Address

Opens the Order Entry - Name/Address window.



Order Entry - Name/Address window

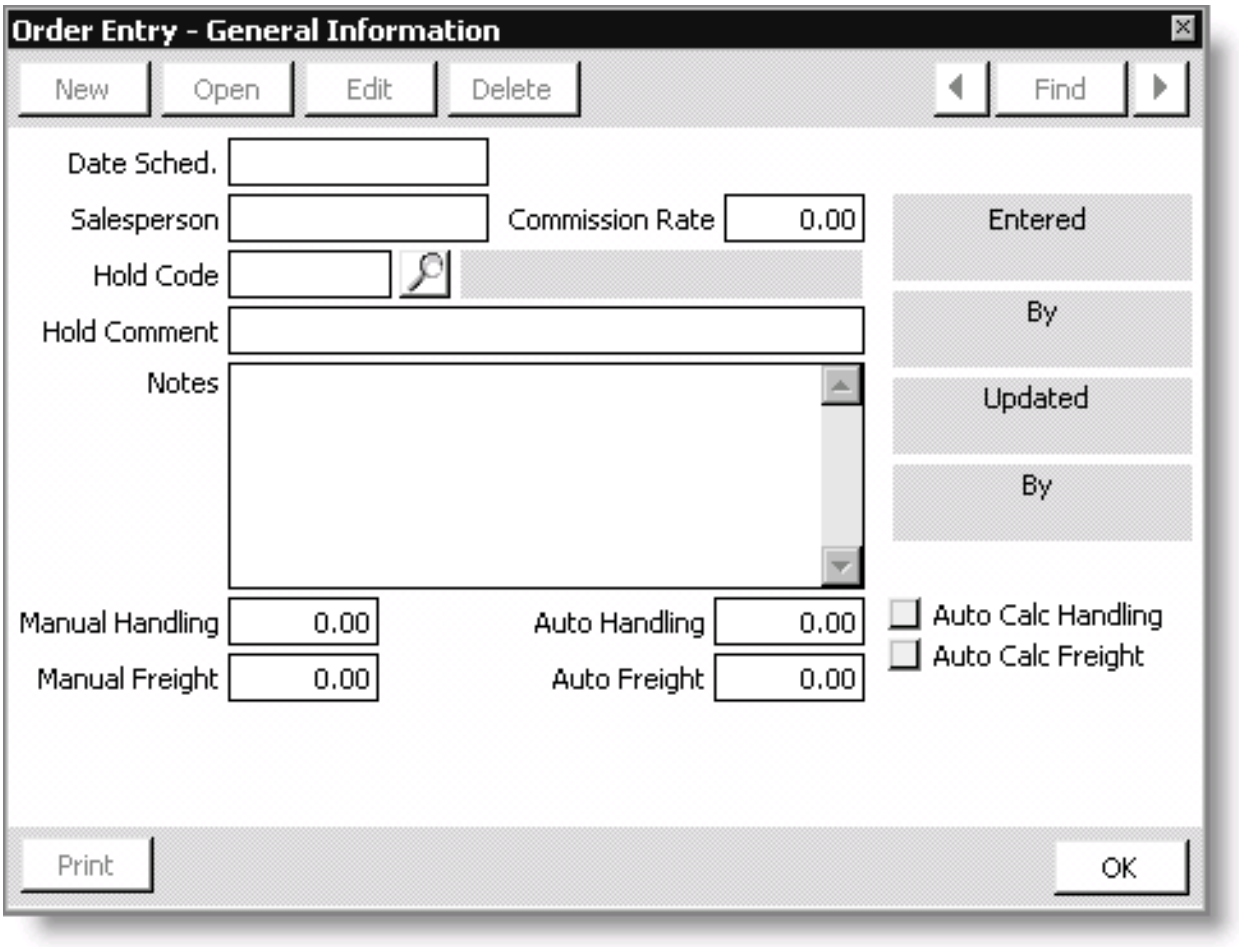
Because the Name, Address, and Telephone fields are copied from the original data, you can change these fields as needed without changing the data in the master file. For example, you can perform the following tasks:

- Change the ID, or use the lookup icon to select a value.
- Modify/change information in all the fields.

Note: If you change the Ship To ID or address on the Order Entry - Name/Address window and then return to the Enter and edit orders window, the Ship To field should now be updated with the new shipping information.

General

Use the Order Entry - General Information window to specify additional order-specific information. You can attach various types of notes to the order, and leave the freight and handling charges as they are on the Enter and edit orders window or override them.



Order Entry - General Information window

Payment

Opens the Order Payment window, where you can enter the check number or credit card information and the payment amount.

Ledger

Opens the Transaction Ledger window for the order.

To enter an order

1. From AR/Cash, select Process orders > Enter and edit orders to open the Enter and edit orders window.

2. Click New.
3. Enter the customer ID in the Bill to Id field.
4. Enter the order information in the Enter and edit orders window.
5. Click Payment to open the Order Payment window.
6. Enter the check number or credit card code and payment amount in the Order Payment window.
7. Click OK.
8. Click General to open the Order Entry - General Information window and enter the general information.
9. Click OK and the system returns to the Enter and edit orders window.
10. Click Address to open the Order Entry - Name/Address window and make any needed changes.
11. Click OK and the system returns to the Enter and edit orders window.
12. Click Save.

To find/view existing orders

You may need to find existing orders for one of the following reasons:

- Edit/correct order data (or delete an order) before the order is invoiced.
- Repeat print an invoice document.
- Review the accounting transaction and status.

The primary method for finding an existing order is to search by either Order or Bill To Id.

To find an existing order by order number

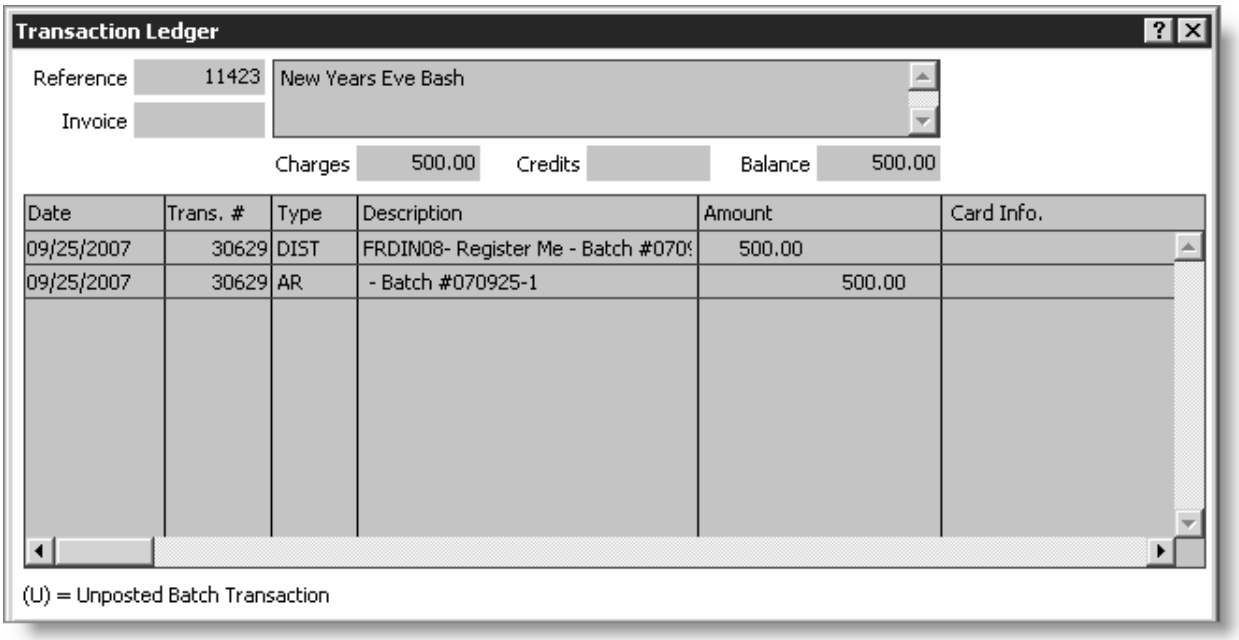
1. From AR/Cash, select Process orders > Enter and edit orders to open the Enter and edit orders window.

2. Click Open.
3. Enter the order number in the Order field, or click the Lookup icon to select a value.

To find an existing order by Bill to ID

1. From AR/Cash, select Process orders > Enter and edit orders to open the Enter and edit orders window.
2. Click Open.
3. Enter the Bill to ID number in the Bill to ID field, or click the Lookup icon to select a value.
4. If there are multiple existing orders for the Bill to ID number, the Order Selector window opens.
5. Select the desired order number and click OK.

Transaction Ledger window for Simple Orders



From Customers, select Manage customers, find a customer's record, select the AR/Cash tab, and double-click a line item

The Transaction Ledger window provides an itemized transaction log related to a specific order/invoice, including fees charged, payments received, and any adjustments made.

Typically, individual lines are displayed for each item and for the payment received and/or the amount charged to AR. If any items are later canceled or adjusted, the Transaction Ledger window also includes lines showing these adjusted amounts. For each transaction line, the Transaction Ledger window shows the date of the transaction, the amount, and the function name or transaction type.

The Description field has this layout, with each element displaying only if it has a value:

Card#, Auth:, Name on Card:, Gateway Ref#, Exp:

Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

To view transactions

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find to open the Search window.
3. Enter the customer ID or click the Lookup icon to select a value, and press Enter.
4. Select the AR/Cash tab to view the customer's AR/Cash information.
5. To open the Transaction Ledger window, double-click a line item.

Note: AR items that have not been invoiced are referenced with an R preceding the item.

Cash handling in order processing

Order entry handles payments in two different ways according to whether the payment is made by check/cash or credit card.

To apply cash/check payments

When a cash/check payment is applied to an order, iMIS immediately recognizes the payment when the order is entered. A debit to the appropriate cash account is created and a credit is applied to the prepaid account specified in default accounts in AR system setup. Cash or check payments are usually deposited immediately and considered as "cash on hand." When the order is subsequently invoiced, the prepaid account is debited and the income account specified for the product code is credited.

To apply credit card payments

If the Recognize Credit Card Order Payments as Prepaid Cash option is not enabled (from AR/Cash, select Set up module), payment is not submitted until the product has been shipped and iMIS recognizes the cash at the time the order is invoiced.

When processing orders with credit card payments, you can either enter the amount in the Payment Amount field or leave the field blank. If a credit card code is entered in the Check/CC field and the amount is left blank, iMIS will simply make the cash amount equal to the invoice amount at the time the order is invoiced. If an amount is entered in the Payment Amount field, iMIS will apply this payment against the invoiced amount. In the case of over/under payments, iMIS will create the appropriate AR entry.

Note: If you are processing orders in iMIS, you must populate the transfer clearing and the prepaid default accounts on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts).

Controlling the recognition of credit card entries in batches

If the Recognize Credit Card Order Payments as Prepaid Cash option is enabled, credit card payments are recognized when they are entered. If the Recognize Credit Card Order Payments as Prepaid Cash option is not enabled, credit card payments are not recognized until their orders are invoiced. The batch into which delayed credit card payments are recognized depends on your system configuration, and on the method you use to generate invoices.

If you are licensed for the Full Order Entry module (Orders), you can control the accounting batch to which delayed credit card payments are posted when you run Process orders> Invoice orders:

To recognize credit card payments in a new or current batch

- Enable the Create New Batch for Invoicing option (from Orders, select Set up module > Order staging).

  iMIS will create a new, self-balancing batch for the entries generated by the invoicing process. The batch, which appears on the Manage batches window, is automatically marked ready for posting and must be posted from this window (from AR/Cash, select Manage batches). The only cash entries in this batch are credit card payments.

  Note: System-generated batches are designed to be posted unchanged. When you edit a system-generated batch or add transactions to a system-generated batch, you must designate a cash account for that batch before your changes can be saved and before the batch is posted.

  To recognize credit card payments in the batch in which they were entered, even if closed

- Disable the Create New Batch for Invoicing option (from Orders, select Set up module > Order staging).

  Note: When using the Full Order Entry module (Orders), invoices run using the Print button will not make entries into a closed batch, even if the Create New Batch for Invoicing option is disabled.

  If you are not licensed for Full Order Entry, or if you are licensed but you disabled the Create New Batch for Invoicing option, credit card payments are recognized in the batch in which they were originally entered. Under these conditions, credit card cash entries may be posted to previously closed batches if invoicing is delayed.

Printing invoices

The invoice printing process prints the invoice and generates the related accounting transactions to record sales. Because orders cannot be modified after they are invoiced, the printing process represents the final step in the order processing cycle.

If you are licensed for Full Order Entry (Orders) the Create a New Batch for Invoicing option affects the batch into which invoices are generated.

When processing invoices individually using the Print button, the transactions created when you invoice orders are subject to the following rules:

- If you are licensed for Full Order Entry and Create New Batch for Invoicing is enabled, the following rules apply:
- If you have an open batch selected in your current session, invoices will be generated into that open batch.
- If you have no open batch selected in your current session, the system will prompt you to select or create an open batch into which the invoice will be generated.
- If you are licensed for Full Order Entry but Create New Batch for Invoicing is not enabled, the following rules apply:
- If the original batch in which the order was generated is open, the invoice will be generated into that same batch.
- If the original batch in which the order was created is closed, but another batch is selected and open in your current session, the invoice will be created into that batch.
- If the original batch is closed, and there is no batch selected and open in your current session, the system will prompt you to select or create an open batch into which the invoice will be generated.

  Caution! Enable the Create New Batch for Invoicing option if you are using the iMIS Orders backorder feature. For example, with the Create New Batch for Invoicing option enabled, an order that is invoiced in April that has a backorder that is filled in June will be in the June batch. Without the Create New Batch for Invoicing option enabled, the invoice for the backorder will be in the original April batch. The invoice will reflect the current date, but the AR statement will reflect the old batch date, which is incorrect for aging. If the April batch is closed, the invoice for the backorder will be in another batch in the current session or in a new batch.

  To print simple order entry invoices

1. From AR/Cash, select Process orders > Generate reports to display the Generate reports window.
2. Select Invoices from the Report Types drop-down list.
3. Select Print New Invoices from the Available Reports drop-down list.
4. Click Set Report Destination to open the Set Report Destination dialog window.
5. Select a report destination and click OK.
6. Click Run. An invoice is produced.

To print selected invoices

1. From AR/Cash, select Generate reports to open the Generate reports window.
2. Select Selected Invoices from the Report Types drop-down list.
3. Select Selected Invoices from the Available Reports drop-down list.
4. Click Set Report Destination to open the Set Report Destination window.
5. Select a report destination and click OK.
6. Click Run.

   The Report: Selected Invoices dialog window displays.
7. Select the type of invoices to include from the Include Invoices area.
8. To limit the invoices to one or more specific entities, enter the desired entities in the Specific Entities field.
9. To limit the printing of invoices to one or more specific system types (for example, DUES, EXPO, etc.), enter the system types in the Specific System Types field.
10. Click OK. An invoice is produced.

Direct Transactions

Many transactions generated by other iMIS features are passed to iMIS AR/Cash for tracking. This section explains how to enter other sales, cash receipts, and adjusting entries directly through iMIS AR/Cash. Information is provided on the types of direct transactions and on the process of deciding between simple order entry and sales transactions. Batch processing works with transaction data entry, and information on processing different transactions is also included.

Direct transactions types

There are four transaction types you can directly enter using AR/Cash. Each transaction type appears as a separate selection on the Enter and edit transactions submenu:

- Sales transactions
- Cash receipts
- Credit memos
- Debit memos

The following sections provide information on each direct transaction type, as well as the procedures involved.

Entering and editing sales transactions

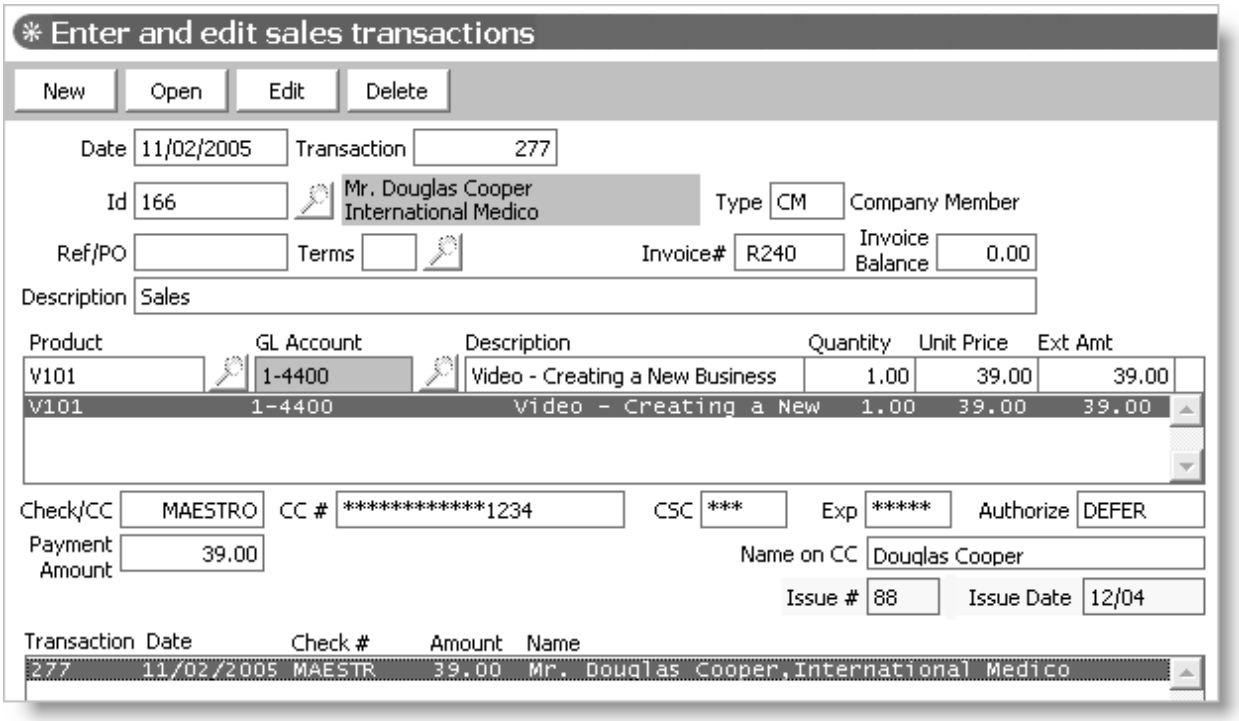
Use the Enter and edit sales transactions window (from AR/Cash, select Enter and edit transaction > Sales transactions) to enter sales transactions that are processed and tracked through iMIS AR/Cash. This window should only be used for transactions that are not processed indirectly through another module.

The purpose for entering data on this window is to record after-the-fact any sales-related transactions, such as manually prepared invoices. iMIS uses the information entered on this window to track several items:

- Product sales items that are passed on to sales history.
- Any outstanding AR amount.

- Any open AR amount that is reduced or eliminated, which is reported on daily and monthly transaction reports.

Enter and edit sales transactions window



From AR/Cash, select Enter and edit transactions > Sales transactions

Date

iMIS automatically enters the current system date (or the date entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to return to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date and cannot be overridden.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Id

Enter the customer ID that relates to the sale, or click Find to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Ref/PO

Enter the customer's purchase number or other reference number that should appear on the invoice. The reference/purchase order value will display on the AR statement.

Terms

(optional) Enter the code for the type of sale terms that apply to this invoice, or click Find to select a value.

Invoice #

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

Invoice Balance

(read only) Running invoice balance automatically updated by iMIS.

Description

Enter the invoice description. This description prints or displays on key reports and creates output, such as statements, trial balances, and account status displays.

Product

Enter a valid product code from the Set up product codes window, or use the lookup icon to select a value.

GL Account

Automatically populated with the GL account number if a GL account number is defined for the product. If the Allow GL Account Edit for Sales Transactions option is enabled

(from AR/Cash, select Set up module), you can enter a GL account number if the GL Account field is blank or enter a different GL account number if the GL Account field is populated.

If a GL account number is not defined for the product and you leave the GL Account field blank, the GL Account field is automatically populated with the default Income Account for the transaction's owner entity.

If the Allow GL Account Edit for Sales Transactions option is disabled, this field is display-only and the GL account number cannot be added or changed.

Description

Automatically entered by iMIS, but can be overridden manually.

Quantity

Enter the Quantity of the product being sold. This quantity is applied against the unit price to arrive at the extended amount.

Enter quantities as whole numbers unless you are designating time or other partial quantities. For time or other partial quantities, enter fractions as decimals: (for example, enter 1.5 for 1-1/2)

Unit Price

iMIS automatically fills in the Unit Price if a product price has been defined on the Product Code window.

To override this price, click on the field (or press Shift+Tab to return to the Unit Price field), and enter a new value.

Ext Amt

(read only) iMIS automatically calculates the extended price.

Check/CC

If the payment is made by check, enter the check number. If the payment is made by credit/debit card, enter the abbreviation for the credit/debit card.

To apply a credit balance to an item, enter an asterisk (*) in the Check/CC field and press Tab. Select the credit from the drop-down list on the Select Open Payments window (you can toggle between viewing the individual's available credits and all available third-party credits by clicking the Indiv./All toggle button) and click OK. Enter the credit amount in the Payment Amount field.

Note: Most *Tab transactions generate extra transfer lines to provide the proper audit trail for both invoice summary lines involved in the transfer and to offset each other to provide a net effect of zero.

AR credit card codes should already be set up on the Set up cash accounts (see "Setting up cash accounts") window.

If you enter a valid credit/debit card code, additional payment fields display:

- CC # - Enter the credit/debit card number.
- CSC - (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp - Enter the card's expiration month and year (mm/yy).
- Authorize - Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC - Enter the name as it appears on the payment card.
- Issue # - (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date - (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).
- Gateway Ref # - Read only: Populates when the gateway provider returns the reference number for the transaction.

Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Payment Amount

Enter the payment amount, whether the payment is made by check or credit/debit card.

Transaction list

Displays the transaction date, check number or credit/debit card type, transaction amount, and customer name.

To record sales transactions

Use sales transactions to record miscellaneous sales and cash receipts that do not fit into any category processed by other iMIS modules, such as Billing, Events, and Order Processing.

Use sales transactions for sales-related entries when you do not need to produce an invoice or a bill. For example, enter sales transactions to record open sales items for a manual (handwritten) invoice and to document paid-in-full transactions without a printed invoice (miscellaneous cash receipts).

1. From AR/Cash, select Enter and edit transactions > Sales transactions to open the Enter and edit sales transactions window.
2. Click New.
3. Enter the customer Id or use the lookup icon and select a value.
4. Place the cursor in the Product field and press Find and select the product.
5. (optional) Place the cursor in the GL Account field and enter or change the GL account number. If the Allow GL Account Edit for Sales Transactions option is not enabled (from AR/Cash, select Set up module), the GL Account field is display-only and the GL account number cannot be added or changed.
6. Place the cursor in the Quantity field and enter the Quantity.

7. Place the cursor in the Check/CC field and enter the check or credit card information.
8. Enter the payment amount in the Payment Amount field.
9. Click Save.

To edit existing sales transactions

To edit a transaction that is still in the system, find the transaction, select edit mode, and make the necessary changes.

Note: You cannot edit transactions that are in a posted or closed batch or transactions that have been transferred to the GL.

You can search for an existing transaction using any of the first three heading fields. After the search, iMIS either displays the transaction you requested or presents a list of transaction options.

Note: iMIS only searches on one field at a time.

1. From AR/Cash, select Enter and edit transactions > Sales transactions to open the Enter and edit sales transactions window.
2. Click Open.
3. Enter a value into one of the first three data entry fields - Date, Transaction number, or Id - and press Enter.

- If iMIS finds your record, then iMIS opens the record in display mode.
- If iMIS finds multiple transactions matching your criteria such as date or ID, it returns a list of potential matches. Double-click on the desired line to open the record in the display mode.

4. Click Edit.
5. Make the necessary changes.
6. Click Save.

Deciding to use a simple order entry or a sales transaction

Note: Simple order entries only appear in systems not licensed for the iMIS Order Processing and iMIS Inventory Control modules.

AR/Cash provides two ways to record miscellaneous sales (whether cash or on account):

- Directly record sales transactions (from AR/Cash, select Enter and edit transactions > Sales transactions)
- Use the built-in simple order entry and billing subsystem (fromAR/Cash, select Process orders > Enter and edit orders)

Selecting the method best for you depends on whether you need to enter certain types of data (such as taxes and handling charges) and whether you need to print invoices.

When to record direct sales transactions

Recording direct sales transactions gives you these benefits:

- Creates sales accounting entries as you enter transactions.
- Immediately updates AR open items, and generates sales history (unless you enable the Separate Posting Cycle Required option with batch control).

However, direct sales transactions do not let you calculate sales taxes or generate invoices. Therefore, use this window to record only after-the-fact sales-related transactions, such as when invoices have already been manually prepared and sent out.

When to use Simple Order Entry

Use simple order entry for sales that have not been processed. When you use the Enter and edit orders window (see "Enter and edit orders window - Simple order entry"), you can apply sales tax, terms, freight, and handling charges on the window. You can also print and send invoice documents.

Note: Initially, the simple order entry only updates the Orders files. When you print invoices for these orders, iMIS then updates the accounting transactions and AR opens items and sales history under the iMIS hot-posting (real-time) feature.

Entering cash receipts

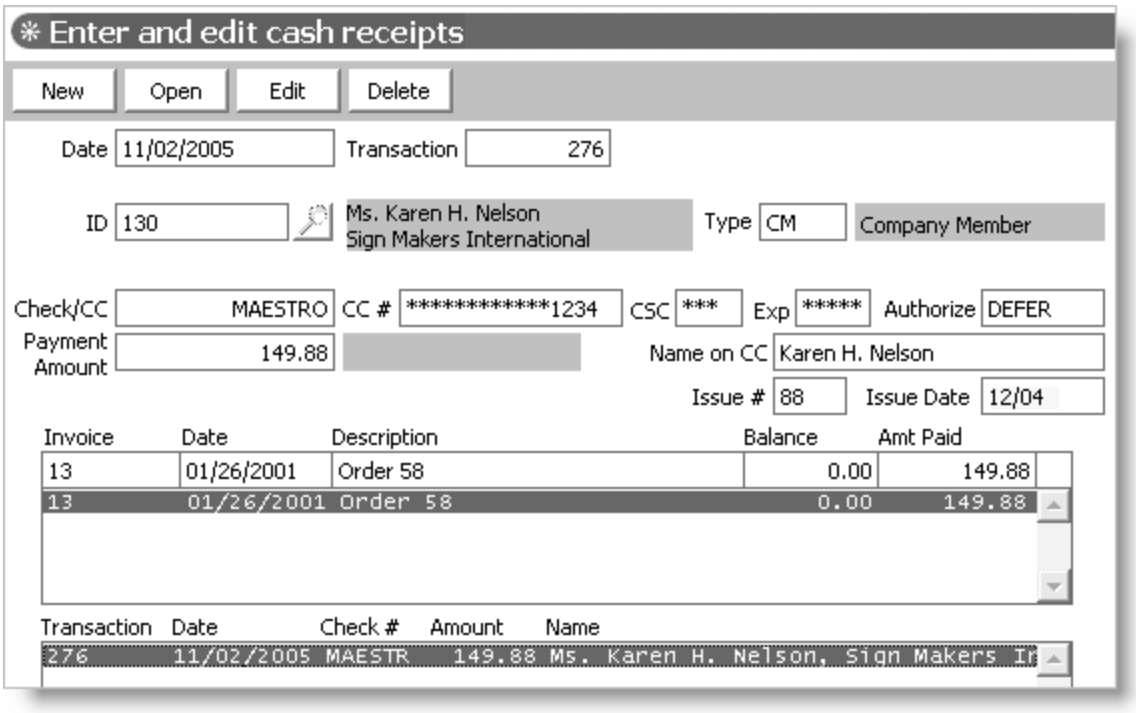
Cash receipts allow you to record payments that are applied against open items, received in advance of sales orders or requests, or of unknown purpose. Typically, cash receipts are the most frequently entered transaction types.

The Enter and edit cash receipts window records amounts received that apply to open AR items. Similar to the Enter and edit sales transactions window, the Enter and edit cash receipts window has a heading section that identifies the following:

- Transaction date
- Customer account ID
- Overall payment information

Below the heading section, the window details the open items where cash can be applied.

Enter and edit cash receipts window



From AR/Cash, select Enter and edit transactions > Cash receipts

Date

iMIS automatically enters the current system date (or the date you entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to return to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date, which you cannot override.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Invoice

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

ID

Enter the customer ID that applies to the cash receipt, or use the lookup icon to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Check/CC

If payment is made by check, then enter the check number. If the payment is made by credit/debit card, then enter the abbreviation for the credit/debit card.

To apply a credit balance to an item, enter an asterisk (*) in the Check/CC field and press Tab. Select the credit from the drop-down list on the Select Open Payments window (you can toggle between viewing the individual's available credits and all available third-party

credits by clicking the Indiv/All toggle button) and click OK. Enter the credit amount in the Payment Amount field.

AR credit/debit card codes should already be set up on the Set up cash accounts window. See Setting up Cash Accounts for information on this procedure.

If you enter a valid credit/debit card code, additional payment fields display:

- CC # - Enter the credit/debit card number.
- CSC - (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp - Enter the card's expiration month and year (mm/yy).
- Authorize - Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC - Enter the name as it appears on the payment card.
- Issue # - (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date - (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).
- Gateway Ref # - Read only: Populates when the gateway provider returns the reference number for the transaction.

  Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Payment Amount

  Enter the payment amount, whether the payment is made by check or credit/debit card.

Invoice

Displays the invoice reference number.

Date

Displays the invoice date.

Description

Displays a brief description of the selected invoice.

Balance

Displays the invoice balance.

Amt Paid

Displays the amount that is being applied to the selected invoice.

Transaction list

Displays the transaction date, check number or credit/debit card type, transaction amount, and customer name.

To enter AR payments

Note: If the Cash Application Auto Apply option is not enabled on the Set up module window, iMIS enables you to decide the line items where the payment should be applied.

1. From AR/Cash, select Enter and edit transactions > Cash receipts to open the Enter and edit cash receipts window.
2. Click New.
3. Enter the customer ID, or use the lookup icon to select a value.
4. If you want to apply a credit balance to an item, perform the following steps:

1. Enter an asterisk (*) in the Check/CC field and press Tab.
2. Select the credit from the drop-down list on the Select Open Payments window (you can toggle between viewing the individual's available credits and all available third-party

credits by clicking the Indiv/All toggle button) and click OK.

3. Enter the credit amount in the Payment Amount field.
4. In the Check/CC field, enter the check number or credit/debit card type, and press Tab. If you entered a valid credit/debit card type in the Check/CC field, enter the following information:

- CC # - Enter the credit/debit card number.
- CSC - (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp - Enter the card's expiration month and year (mm/yy).
- Authorize - Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC - Enter the name as it appears on the card.
- Issue # - (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date - (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).

  Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

6. Enter the payment amount in the Payment Amount field, and press Tab.
7. Select one of the following transaction options:

- To apply cash to an item, double-click on the item in the list and enter the amount to apply to the item in the Amt Paid field.

- To undo the cash application, double-click the item again.
- To apply cash as a future or unidentified credit, double-click the (Pre-Pay - New) line (or single-click and fill in the Amt Paid with the prepayment amount), which creates an item named PrePay: transaction date.
- To partially apply cash to an item, select the line and enter the amount to apply to the item in the Amt Paid field.

8. Click Save.

   To automatically apply AR payments

   Note: You can edit only transactions that are in an open batch or that have not been transferred to the GL.

   The method for finding and editing AR payment transactions is similar to the sales transaction editing process.

1. If the Enter and edit cash receipts window is not open, from AR/Cash, select Enter and edit transactions > Cash receipts.
2. Click Open.
3. Enter the customer ID or use the lookup icon to select a value, then press Enter.
4. Select the line item for the transaction you wish to alter.
5. Click Edit.
6. Enter the payment amount in the Payment Amount field.
7. Enter the payment amount in the Amt Paid field.
8. Click Save.

   To reverse a payment and record returned checks

   Use the Enter and edit cash receipts window to record returned checks, or to reverse all or a portion of a payment for a sales transaction or simple order entry transaction if the

payment was made through Cash Receipts. The following procedure records a returned check.

1. From AR/Cash, select Enter and edit transactions > Cash receipts to open the Enter and edit cash receipts window.
2. Click New.
3. Enter the customer ID or click the Lookup icon to select a value, then press Enter.
4. Enter the original check number or credit card information.

   Note: If you are recording a returned check, you can preface the Check/CC field entry with RET or a similar abbreviation to make it easier to identify return checks in reports and window displays.
5. Enter a negative amount in the Payment Amount field.
6. Select the line item where the payment is to be removed.
7. Enter a negative amount in the Amt Paid field.
8. Click Save. The Enter and edit cash receipts window opens.
9. From Customers, find the customer record, select the AR/Cash tab, and double-click the line item entry for the original transaction to display the Transaction Ledger window.

To record returned checks/payment reversals for dues and subscriptions

Use the Dues/Subscriptions Payments by Individual window to record returned checks or to reverse all or a portion of a payment for a dues or subscription product after the original transaction has been completed.

1. From Customers, select Manager customers to display the Manage customers window.
2. Use the lookup icon, enter the customer ID, and press Enter.
3. Select the Billing tab to display the customer's Billing information.
4. Select the line item associated with the returned check/payment reversal and click Payment to display the Dues/Subscription Payment by Individual window.

5. Click New.
6. Enter the original check number or credit card information.

   Note: If you are recording a returned check, you can preface the Check/CC field entry with RET or a similar abbreviation to make it easier to identify return checks.
7. Enter the returned check amount as a negative amount in the Pay Amount field.
8. Click Save.
9. A warning dialog displays indicating that there is an underpayment. Click Yes on the warning dialog.
10. You can then change the term for the dues or subscription product on the Dues/Subscription Item Detail window.

Adjusting journal entries

You can select Enter and edit transactions to see the Credit memos and Debit memos options.

Note: Use the Enter and edit credit memos and Enter and edit debit memos windows only when you need to change to an existing open item, to credit (reduce) or debit (increase) it.

Credit memos make adjustments that reduce or reverse normal (or debit balance) open AR items. These transactions create accounting entries but no printable documents, other than transaction entries on batch and other audit-trail reports.

Use credit memos (infrequently) to perform the following operations:

- Write off an uncollectible open item (a “bad debt”)
- Reduce or reverse a line item charge, correcting an overcharge
- Reverse an existing sales (or simple order) transaction entirely
- Record a product return to credit the customer

Note: You should not use a credit memo to apply a credit for an event function. To apply a credit against an event function, edit the event registration and remove the function fee only. This will ensure that the correct account transactions are performed.

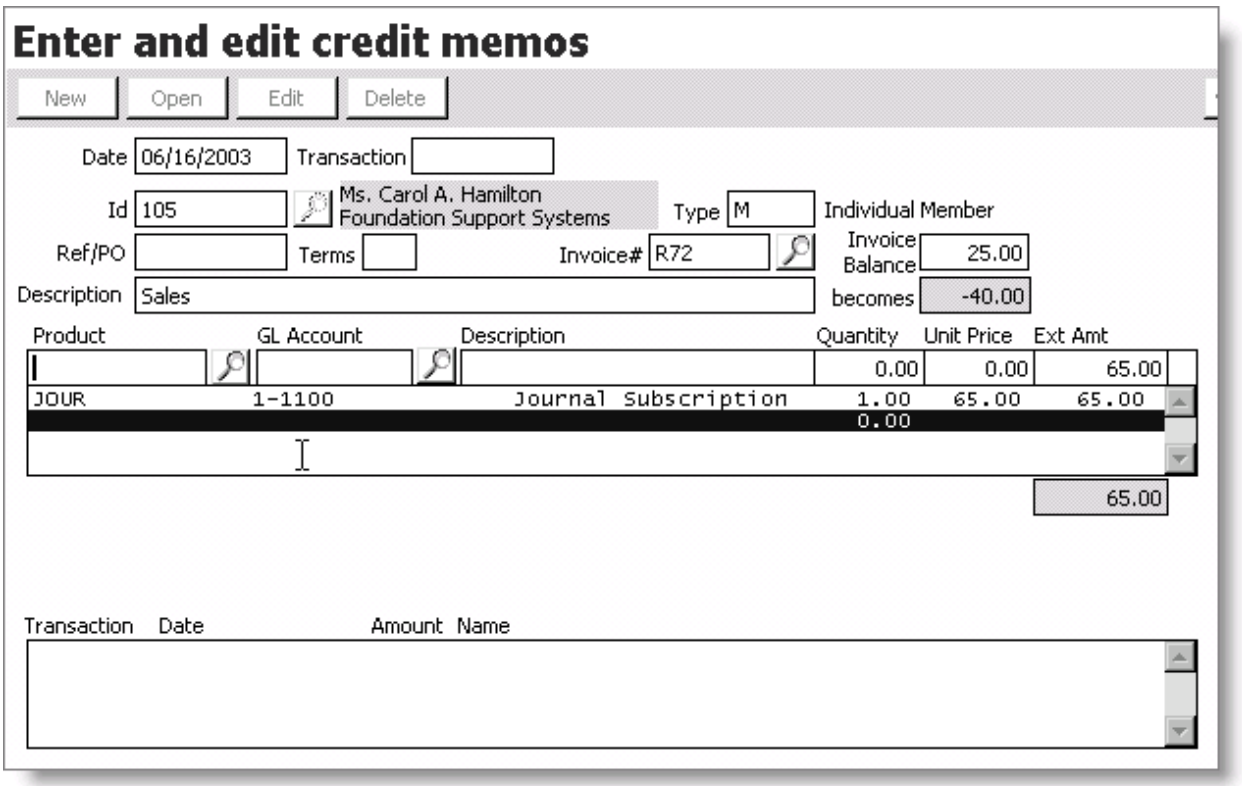
Debit adjustments are the opposite of credit memos. They make adjustments that increase the debit balance of open AR items.

Use debit adjustments (rarely) to perform the following operations:

- Increase or add a line item charge to correct an undercharge
- Zero out a credit balance for a refund due to an overpayment, credit memo, or cancellation transaction

The preferred method to make debit adjustments is to issue refunds in the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices).

Enter and edit credit memos window for AR/Cash



From AR/Cash, select Enter and edit transactions > Credit memos

Date

iMIS automatically enters the current system date (or the date you entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to return to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date and cannot be overridden.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Id

Enter the customer ID that relates to the sale, or use the lookup icon to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Ref/PO

Enter the customer's purchase number or other reference number that should appear on the invoice. The reference/purchase order value will display on the AR statement.

Terms

(optional) Enter the code for the type of sale terms that apply to this invoice, or use the lookup icon to select a value.

Invoice #

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

Invoice Balance

(read only) Running invoice balance automatically updated by iMIS.

becomes

(read only) Invoice balance after the credit adjustment (only displays when you click New).

Description

(read only) This description is populated by the description in the invoice to which the credit memo is related.

Product

Enter a valid product code from the Set up products window, or use the lookup icon to select a value.

GL Account

Automatically populated with the GL account number if a GL account number is defined for the product. If the Allow GL Account Edit for Sales Transactions option is enabled (from AR/Cash, select Set up module), you can enter a GL account number if the GL Account field is blank or enter a different GL account number if the GL Account field is populated.

If a GL account number is not defined for the product and you leave the GL Account field blank, the GL Account field is automatically populated with the default Income Account for the transaction's owner entity.

If the Allow GL Account Edit for Sales Transactions option is disabled, this field is display-only and the GL account number cannot be added or changed.

(Product) Description

Automatically entered by iMIS, but can be overridden manually.

Quantity

Enter the Quantity of the product being sold. This quantity is applied against the unit price to arrive at the extended amount.

Enter quantities as whole numbers unless you are designating time or other partial quantities. For time or other partial quantities, enter fractions as decimals: (for example, enter 1.5 for 1-1/2)

Unit Price

iMIS automatically fills in the Unit Price if a product price has been defined on the Product Code window.

To override this price, click on the field (or press Shift+Tab to return to the Unit Price field) and enter a new value.

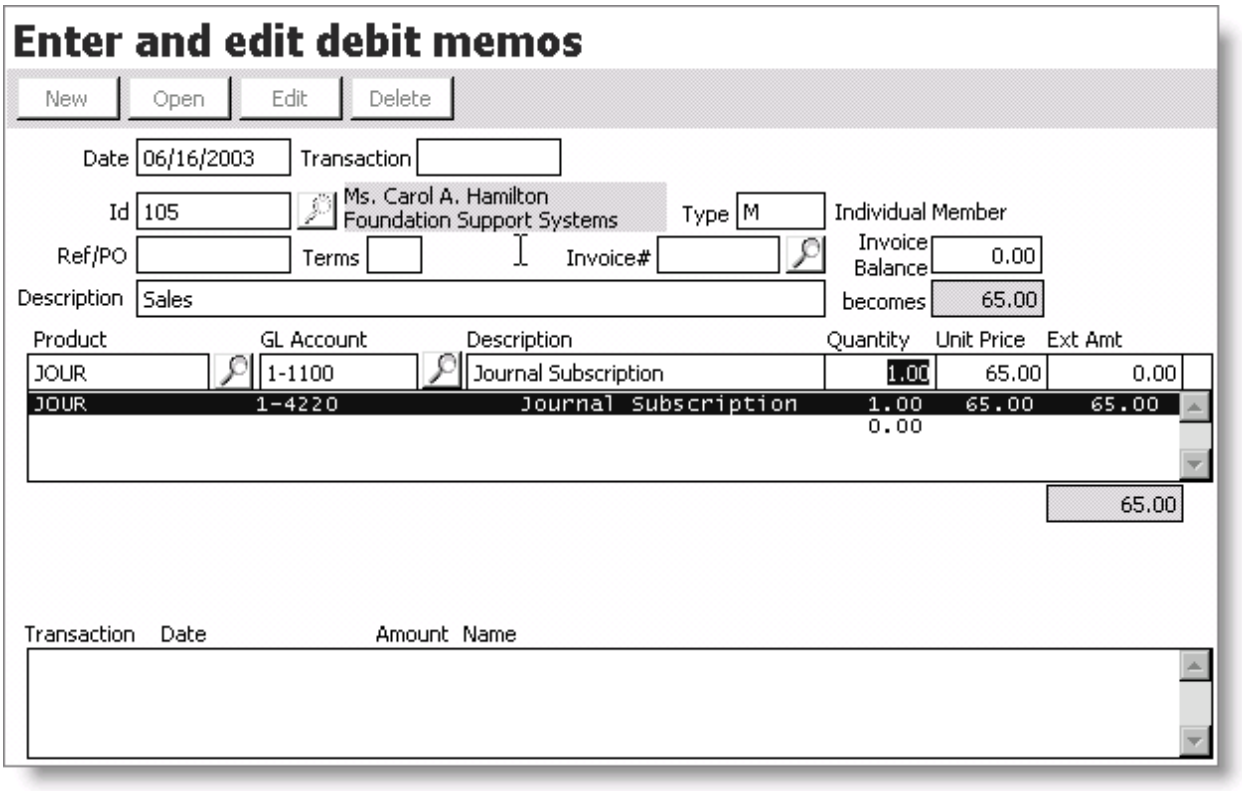
Ext Amt

(read only) iMIS automatically calculates the extended price.

Transaction list

Displays the transaction date, check number or credit card type, transaction amount, and customer name.

Enter and edit debit memos window for AR/Cash



From AR/Cash, select Enter and edit transactions > Debit memos

Date

iMIS automatically enters the current system date (or the date entered earlier in the session) for the transaction date.

To override this date, click on the field (or press Shift+Tab to move the cursor back to the Date field) and enter a new value.

Note: If you are using batch control, this field defaults to the active batch date and cannot be overridden.

Transaction

(read only) The transaction number is automatically assigned by iMIS after the transaction has been processed.

Id

Enter the customer ID that relates to the sale, or use the lookup icon to select a value.

Type

(read only) The customer type that corresponds to the customer ID.

Ref/PO

Enter the customer's purchase order number or other reference number that should appear on the invoice. The reference/purchase order value will display on the AR statement.

Terms

(optional) Enter the code for the type of sale terms that apply to this invoice, or use the lookup icon to select a value.

Invoice #

Enter the numeric code listed on the manual (paper) invoice. If no code exists and you leave this field empty, iMIS supplies a sequential reference number that appears on all related windows and reports. Reference numbers have a prefix of R.

Invoice Balance

(read only) Running invoice balance automatically updated by iMIS.

becomes

(read only) Invoice balance after the credit adjustment displays in this field (only displays when you click the New button)

Description

(read only) This description is populated by the description in the invoice to which the credit or debit memo is related.

Product

Enter a valid product code from the Set up products window, or use the lookup icon to select a value.

GL Account

Automatically populated with the GL account number if a GL account number is defined for the product. If the Allow GL Account Edit for Sales Transactions option is enabled (from AR/Cash, select Set up module), you can enter a GL account number if the GL Account field is blank or enter a different GL account number if the GL Account field is populated.

If a GL account number is not defined for the product and you leave the GL Account field blank, the GL Account field is automatically populated with the default Income Account for the transaction's owner entity.

If the Allow GL Account Edit for Sales Transactions option is disabled, this field is display-only and the GL account number cannot be added or changed.

Product Description

Populated automatically by iMIS, but can be overridden manually.

Quantity

Enter the Quantity of the product being sold. This quantity is applied against the unit price to arrive at the extended amount.

Enter quantities as whole numbers unless you are designating time or other partial quantities. For time or other partial quantities, enter fractions as decimals: (for example, enter 1.5 for 1-1/2)

Unit Price

iMIS automatically fills in the Unit Price if a product price has been defined on the Set up products window.

To override this price, click on the field (or press Shift+Tab to return to the Unit Price field), and enter a new value.

Ext Amt

(read only) iMIS automatically calculates the extended price.

Transaction list

Displays the transaction date, check number or credit card type, transaction amount, and customer name.

Recording credit memos

Credit memos make adjustments that reduce or reverse normal open AR items. Use credit memos to perform the following operations:

- Write off an uncollectible open item.
- Reduce or reverse a line item charge.
- Reverse a previously entered sales (or simple order) transaction.

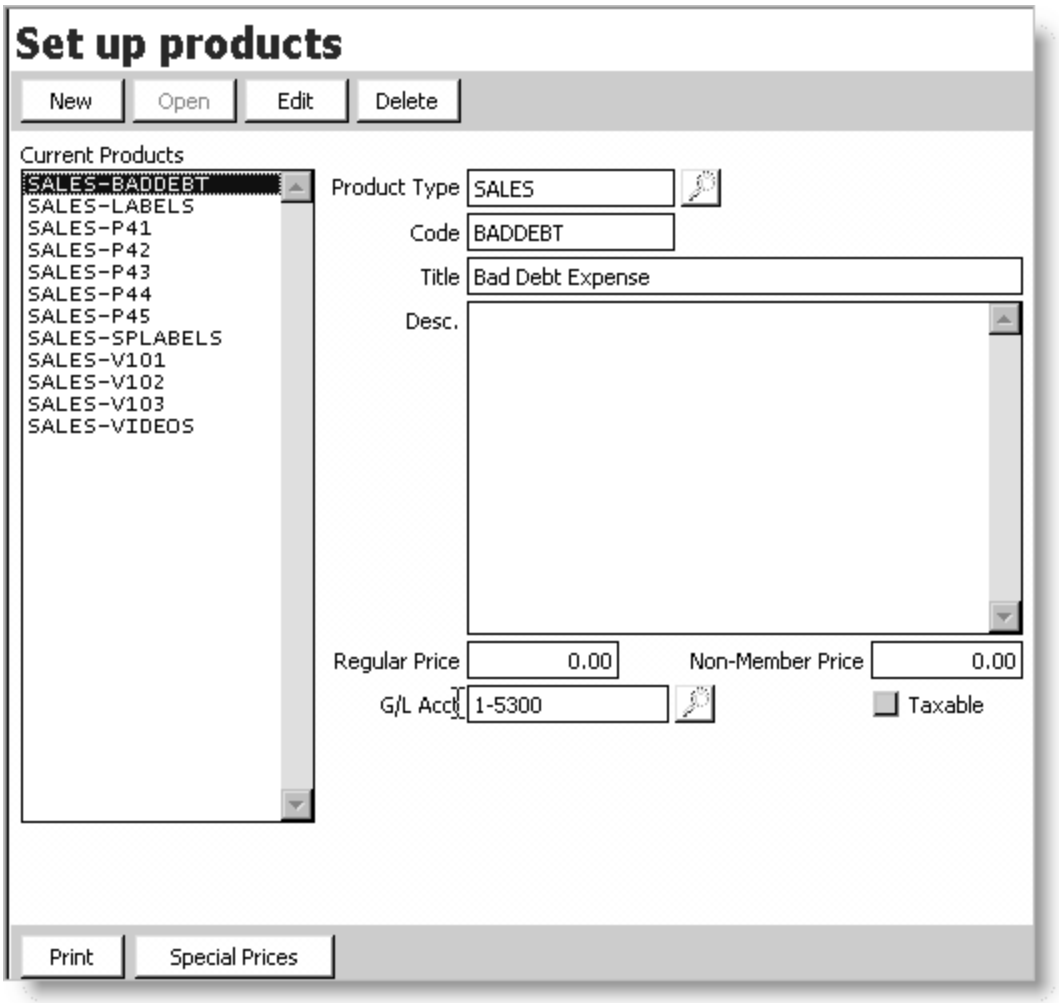
Note: Although credit memo transactions create accounting entries that are used to reduce or reverse an open debit item, these transactions do not produce any documents other than normal transaction entries on batch and other transaction-related audit trail reports.

To write off bad debt

iMIS allows you to write off a bad debt, an uncollectible item you do not expect to see fulfilled. In order to write off a bad debt, you must first set up a product that corresponds to the bad debt expense on the Set up products window.

1. From AR/Cash, select Set up tables > Products to open the Set up products window.
2. Click New.
3. Enter SALES in the Product Type field.
4. Enter a code for the bad debt item. BADDEBT is used in this example.
5. Enter a title in the Title field. Bad Debt Expense is used in this example.
6. If desired, enter a short description in the Des. field.
7. Leave the Regular Price and Non-Member Price at zero so that you can enter variable balances.

8. (optional) Place the cursor in the GL Account field and enter or change the GL account number for the bad debt write-off. If the Allow GL Account Edit for Sales Transactions option is not enabled (from AR/Cash, select Set up module), the GL Account field is display-only and the GL account number cannot be added or changed.
9. Click Save. You can now reference the item (in this example, BADDEBT) on the Enter and edit credit memos window and properly track this expense account.



Set up products window showing BADDEBT product code

To adjust an open item

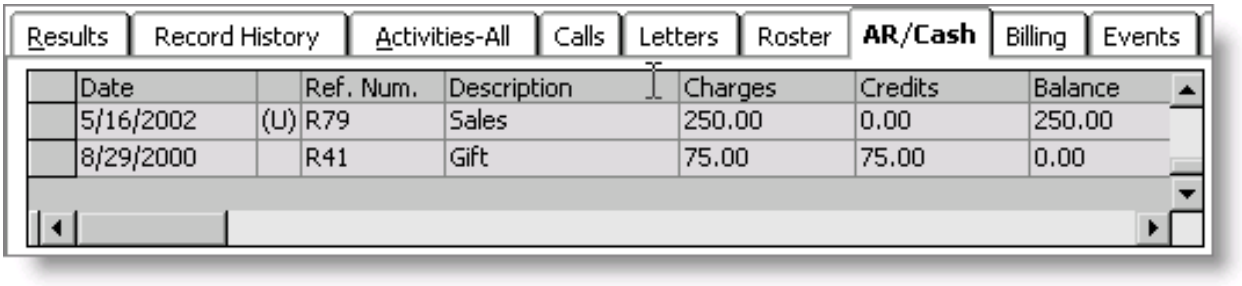
To adjust an existing open item, first enter the item's invoice number or reference in the Invoice # field on the Enter and edit credit memos or Enter and edit debit memos window. If you do not know the invoice number or reference:

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find and enter the customer ID in the Search window, then press Enter.
3. Select the AR/Cash tab to view the AR/Cash information.

   If you double-click a record, the Transaction Ledger window displays, showing detailed information.
4. Locate the invoice number or reference you need in the Ref. Num. column.
5. From AR/Cash, select Enter and edit transactions > Credit memos to open the Enter and edit credit memos window (or select Enter and edit transactions > Debit memos to open the Enter and edit debit memos window).
6. Click New.
7. Enter the customer Id, or click the lookup icon to select a value.
8. Enter the invoice or reference number in the Invoice # field, or click Find to look up the invoice or reference number. Make sure to capitalize any letters when you enter the code, for example, R12.
9. Enter the data according to the following adjustment situations in the Product, Quantity, and Unit Price fields. Repeat these steps for all line items that require an adjustment.
10. To apply credit memos to open items, select one of the following options:

- To write off a bad debt, select the product (for example, BADDEBT), enter the quantity as 1, and enter the unit price as the amount of the balance to be written off.
- To correct an overcharge, enter original product and quantity; adjust the unit price.
- To reverse an entire sales transaction, enter the original product, quantity, and price for all line items.
- To credit a returned product, enter original product, quantity returned, and original price.

11. To make debit adjustments to correct an undercharge, enter the original product and quantity, and adjust the unit price as needed.
12. (optional) Place the cursor in the GL Account field and enter or change the GL account number. If the Allow GL Account Edit for Sales Transactions option is not enabled, the GL Account field is display-only and the GL account number cannot be added or changed.
13. Click Save.



Example of an adjustment to an open item

To record debit adjustments

Debit adjustments make adjustments that increase the debit balance of open AR items. Debit adjustment transactions have the opposite effect of credit memos.

Debit adjustments are used to increase or add a line item charge; bring a credit balance to zero due to an overpayment or credit memo; or cancel a transaction.

Note: iMIS AR/Cash has more automated facilities for processing refunds or application/transfers of credit balances to other sales transactions. See Creating Credit Invoices.

Billing Administration

Accrual Dues

The Process accrual dues task item displays only if Accrual is enabled as the default accounting method on the Set up general options window.

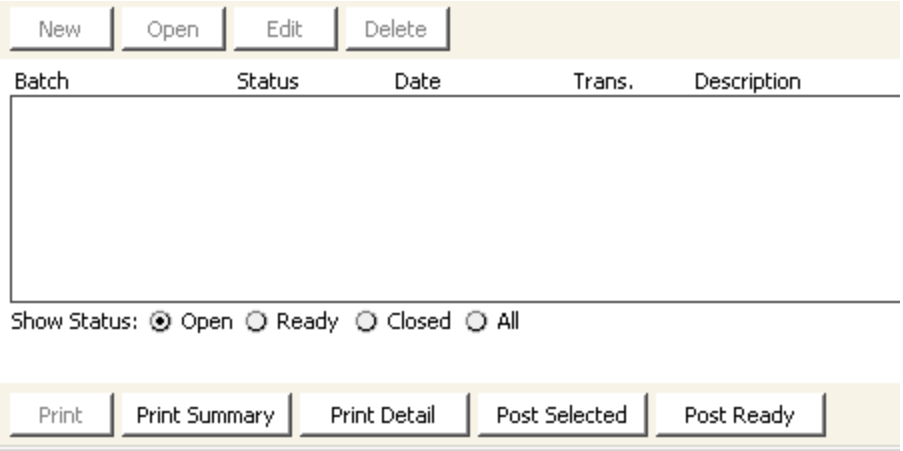
Process accrual dues subtask list

Note: Note: From Billing, select Process accrual dues.

Using the accrual method for managing your dues products, you can book income or deferred income, and create open accounts receivable items whenever you generate bills. The accrual dues method provides the following:

- Creation of unposted transaction records - Option to review, reject, and rerun billing results prior to batch posting
- Two accrual basis dues billing run reports - Dues Batch Summary and Dues Batch Detail reports
- AR Payment Application option - Distribute partial payments by priority or proportionally
- Paid Thru Date Update option - Update Paid Thru date when the invoice is paid in full or at billing time
- Cash/Accrual Option at the Billing Cycle level - Process a mixture of accrual- and cash-based billings

Manage accrual dues window



Admin Console: Home > Membership and Dues > Manage accrual dues

Desktop: Billing > Process accrual dues

Setting the accrual dues options

Use the Set up general options window to set up accrual dues.

To set the defaults for accrual dues

> **Note:** Caution! If you plan on running both cash and accrual billing cycles, you must select the Accrual accounting method.

1. From Billing, select Set up general options to open the Set up general options window.
2. Click Edit.
3. Select Accrual accounting method.
4. Select your preferences for Paid Thru Date Update and AR Payment Application.
5. Click Save.

Creating an accrual dues billing cycle

You can set the accounting method for a billing cycle to either Cash or Accrual on the Set up billing cycles window. The Default selection uses the accounting method set on the

Set up general options window. This section explains only the fields that need to be set on the Set up billing cycles window for accrual dues.

> **Note:** Note: If the default accounting method in the Set up general options window is set to Accrual, you can select Cash or Accrual as the accounting method for the billing cycle. If the default accounting method is set to Cash, you cannot change the accounting method on the Set up billing cycles window to Accrual. If you try to set the billing cycle accounting method to Accrual when the Billing accounting method system default is Cash, a message is displayed informing you that you must change your accounting method to Accrual.

To add an accrual dues billing cycle

1. From Billing, select Set up module > Billing cycles to open the Set up billing cycles window.
2. Click New.
3. Enter the new billing Cycle Name.
4. Select the customer types you want to bill.

   Note: To select multiple Member Types, Categories, or Products, hold down the Ctrl or Shift (sequential range) while you select your selections.
5. Select the Categories of the customer types you want to include in the billing.
6. Select the Products that will be included in the bill that are not included on the Set up customer types window.
7. Select the options that will be used to format the printed bill:

- Forms -Select the renewal notice format from the list.
- Major Sort - Select the order in which the bills are sorted for printing.
- Member Sort - Select the order in which the individuals (Ship to) are listed on the list bill. (This is used only for list bills in which dues and/or subscriptions for several individuals or

branches are itemized on a single bill and sent to a single parent company or third party.)

- Product Sort - Select the order of the line items on the dues bill.

8. Select the Include options that also need to be billed.

   Tip: To select all chapters (CHAPT) and sections (SEC), select the Include all sections and Include all chapters options located in the Other Bill Instr. section.

9. (Required for dues billing) Select the Add Member Type Items option to select all product codes defined on the Set up customer types window.
10. Select the Annual/Anniv drop-down list and select when the billing cycle should be billed (Annual or Anniversary), or retain the default setting. iMIS defaults to the setting specified in system setup.
11. Select the Cash/Accrual drop-down list and select the accounting method of Cash or Accrual, or retain the default setting. iMIS defaults to the setting specified in system setup.

    Note: You can select Cash or Accrual if the default accounting method on the Set up general options window is set to Accrual. If you try to set the billing cycle accounting method to Accrual when the Dues accounting method system default is Cash, a message is displayed informing you that you must change your accounting method to Accrual.

12. Click Save.

Using batch control with accrual dues

Batch control plays a key role in the accrual dues billing process, even if Batch Control is not enabled on the AR/Cash Batch Control window. See Accounts Receivable for more information.

Batch control and mass dues billing

Each time an accrual mass dues billing is run, a new special-purpose batch is generated.

If the Operator Assigned Batch Numbers option is enabled on the AR/Cash Batch Control window, you are prompted for a batch name when billing begins. Otherwise, the system

automatically assigns a batch number according to the method chosen on the AR/Cash Batch Control window. If batch control has not been enabled, the Auto Date assignment method is used.

All transactions within the batch are left unposted; this allows you to review the results. If the results are wrong, you can delete the batch, make necessary changes, and rerun the billing.

> **Note:** Note: The Separate Posting Cycle Required option on the AR/Cash Batch Control window is ignored in the case of a mass accrual dues billing batch. Data will always be generated as if the option is enabled. Until batch posting occurs, no billing data, accounting data, or customer data will be updated.

The Post batches window (from Billing, select Process accrual dues> Post batches) lists all mass dues billing batches. You can print dues-oriented detail and summary reports from this window for review and posting. If the data is wrong, you can also use this window to delete unposted batches. After you make the corrections, you can rerun the billing. If the data is accurate, you can post the batch from this window.

If batch control is enabled, you can also print and post the accrual dues billing batches from the traditional Open Batches window.

When batch control is enabled, iMIS prevents you from using batches generated by an accrual mass dues billing run for any other type of transaction processing. If an accrual dues billing batch is active when you try to enter or edit a transaction, the Open Batches window will automatically open to remind you to select a different batch. Similarly, you cannot use mass billing batches to process individual or one-up dues billings.

> **Note:** Note: If you run an individual accrual billing when a mass accrual dues batch is open, a message is displayed asking you to select another batch or create a new one. Only one batch can be open for each cycle. This feature prevents you from generating duplicate billing transactions.

> **Note:** Note: If you try to generate a mass billing for a cycle that was previously run and has an open batch, a message is displayed informing you that you must cancel or post the previous batch before running another billing for the current cycle.

Batch control and individual dues billing

Billing on an individual or one-up basis works in a more traditional iMIS batch-processing environment. These billings are processed in a batch only if a batch control option is enabled on the AR/Cash Batch Control window. See Accounts Receivable for more information.

The accounting transactions generated by the individual billing process automatically go into any traditional active batch. If there is no active batch, the regular Open Batches window opens so that an open batch can be activated.

The batch verification process for an individual dues billing also validates that the active batch date matches the Run Date on the Process billing window.

Example: If the open batch does not match the Effective Date of the individual billing run, a message is displayed informing you that you must select an open batch whose Effective Date matches the billing run date. You can select either a batch where the batch date is equal to the dues billing batch, or override the dues billing Run Date to match the batch date.

After you have reviewed and accepted the billing data, all individual-billing transactions will be “hot posted” to facilitate the immediate printing of the renewal notice or initial bill.

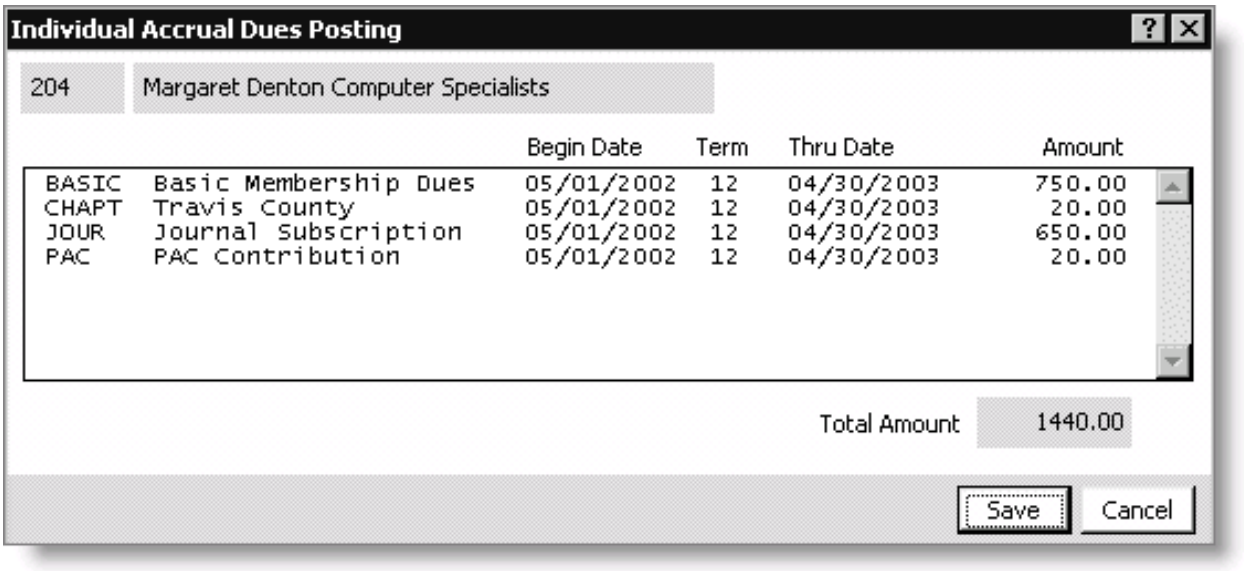
> **Note:** Note: The Separate Posting Cycle Required option is ignored in the case of an individual or 1-up dues billing. Data will always be generated as if the option is disabled.

Generating an individual accrual dues billing

When a dues billing is processed for an individual using Accrual basis dues, the Individual Accrual Dues Posting window displays the billing information. This window allows

you to review the results of the individual billing and post or cancel the billing.

Individual Accrual Dues Posting window



Individual Accrual Dues Posting window

To generate an individual accrual dues billing

Note: Caution! If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record or add a new customer.
3. Select the Billing tab.
4. Click Create Invoice to open the Dues Billing Selections window.

   Note: Only billing cycles appropriate for the individual customer's type display in the Select a Cycle to Process scrolling list.
5. Click New.
6. Select the Renewals billing options.

7. Select the Printing options. If you want to print a renewal notice for this individual, select the Initial Bill option. Renewal notices may be printed at the same time as billing only for individual accrual dues.
8. Override the Run Date, if necessary.
9. Select the Accrual Billing Cycle to process.
10. Override the Effective Date, if necessary.
11. Click Run. The Individual Accrual Dues Posting window displays.
12. Click Save if the billing information is correct, or click Cancel to delete the transaction records before they are posted.

    Note: If you click Cancel, the unposted transaction records are deleted and any printing requested is canceled.

Generating a mass accrual dues billing

When an accrual method billing cycle is selected, certain areas of the Process billing window may be disabled or grayed out. For example, the rebill and available credit options are not allowed for accrual dues items.

> **Note:** Note: A new batch will be generated for each mass dues billing run even if you do not have Batch Control enabled on the AR/Cash Batch Control window.

To generate a mass accrual dues billing

1. From Billing, select Process billing to open the Process billing window.
2. Click New.
3. Select the Renewals billing option.

   Note: The Rebill option is not allowed for accrual dues items. Adjustments must be made using debits or credits (see Processing Adjustments).

Note: Printing of renewal notices under accrual dues is not allowed with the generation of the billing. You must post the batch and then print the renewal notices separately (see Printing Renewal Notices).

4. (optional) Override the Run Date.
5. Select an accrual billing cycle.
6. (optional) Override the Effective Date.
7. (optional) Select any Additional Options.

   Note: The AVAIL_CREDIT feature is currently not supported by accrual dues cycles. All accrual dues cycles will operate as if the Don't Apply Credits option on the Process billing window is enabled.
8. Click Run to process the billing run.

   Note: A new batch will be generated for each mass dues billing run even if you do not have Batch Control enabled on the AR/Cash Batch Control window. If you have selected Operator Assigned Batch Numbers, iMIS will prompt you for a batch number (maximum of ten characters) when the billing process is started. Otherwise, the system will assign a batch number automatically according to the selection made for batch numbering on the AR/Cash Batch Control window.

Posting mass accrual dues batches

After you have generated a mass accrual dues billing, review and post the batch. The Post batches window allows you to review, post, or cancel individual batches prior to posting the batches to the Transaction table.

To print an accrual dues batch

Before posting an accrual dues batch, click Print Summary or Print Detail to review the results of the accrual dues billing run.

1. From Billing, select Process accrual dues> Post batches to open the Post batches window.

2. Select the batch to be printed.
3. Select File> Report Destination and select the print destination.
4. Click Print Summary to print the Dues Batch Summary Report, or click Print Detail to print the Dues Batch Detail Report.

   The Dues Batch Summary Report summarizes the transaction records for each customer type. It provides subtotals for the number of records and amounts for each product code for that customer type. It also provides a subtotal for each customer type and a grand total for the accrual dues billing run at the end of the report.

   For each customer billed, the Dues Batch Detail Report lists the line items billed (including term dates and amounts) with a subtotal by ID. On a list bill, you can use the Bill to ID to further group and subtotal the details for multiple customers.

   To post a mass accrual dues batch

   If the billing transaction data is accurate, you can finalize the transaction by posting the batch.

1. From Billing, select Process accrual dues> Post batches to open the Post batches window.
2. To post a single batch, select the batch you want to post and click Post Selected.
3. To post multiple batches, double-click each open batch to mark it as ready, select the Ready option to view the ready list, and click Post Ready.

   iMIS processes the batch and prints the Dues Batch Detail Report and the Batch Posting Listing report. The batch status changes to Posted.

   To delete an unposted batch

   If any of the billing transactions are incorrect (such as wrong customers or line items billed, or incorrect term dates or amounts), simply delete the billing results; correct the causes of the errors, and run the billing process again.

> **Note:** Note: You must delete an unposted batch if you want to rerun the billing cycle.

1. From Billing, select Process accrual dues> Post batches to open the Post batches window.
2. Select the batch you want to delete.
3. Click Delete. A message is displayed asking you to confirm the deletion.
4. Click Yes to delete the batch.

Viewing billing results

You can view the billing results through the following windows:

- Billing tab: Select the Billing tab on the Manage customers window.
- Dues/Subscription Item Detail window: Double-click a line item on the Billing tab to open the record in the Dues/Subscription Item Detail window. View the record or click Edit to modify the record.

  Note: Several accounting-oriented fields are unavailable for editing with an accrued line item.
- AR/Cash tab: Select the AR/Cash tab on the Manage customers window.
- Transaction Ledger window: Double-click a line item on the AR/Cash tab to see the transaction details.

> **Note:** Tip: See Billing run troubleshooting.

Processing accrual dues payments

Processing payments in iMIS Desktop

Payments for accrual dues items can be processed on the AR Cash > Enter and edit cash receipts window, or through Payment Entry in iMIS Service Central.

The Enter and edit cash receipts window allows you to enter and edit payments for dues invoices. Payments are applied across Dues open line items either by priority or proportionally, depending on the AR Payment Application option selected on the Set up general options window.

If the Paid Thru Date Update option on the Set up general options window is set to Paid in Full, the following dates are updated:

- The line item's Paid Thru date is advanced to the end of the billing term when the item is paid in full.
- The customer's Paid Thru date is advanced to the end of the billing term when the first item on the Set up customer types window is paid in full.

If the Paid Thru Date Update option on the Set up general options window is set to Billing Time, the Paid Thru date will be updated when the initial accrual dues billing is performed.

New transaction and activity records are created for each payment made to each dues line item.

Processing payments in iMIS Public view

Users can pay for their dues and subscriptions in the Public view from Contacts > Contact Management > Billing. All accrual billing items must be paid for at the same time; users cannot optionally select or deselect items that appear in their Billing list. If a contact's items have been billed to another party, those items appear in the Billing list for the Bill to ID. To allow payments on the web, enable the option Allow customers to make accrual dues payments on the web from System Setup > Set up commerce web components > Billing Configuration.

Processing adjustments

Credit and debit memos can both be used to make adjustments that increase, reduce, or reverse open AR items. Credit memos are used to make adjustments that reduce or reverse open AR items that are typically a debit balance. These transactions create

accounting entries but no printable documents, other than transactions on batch and other audit-trail reports.

Authorization levels for credit/debit memos

The Enter and edit credit memos and Enter and edit debit memos windows adhere to the same security rules as the Enter and edit payments window:

- To find and view an existing credit or debit memo, you must have a Billing authorization level of one (1) or greater.
- To enter new accrual dues credit or debit memos, you must have a Billing authorization level of three (3) or greater. A Billing authorization level of three (3) will allow you to edit or delete credit or debit memos you have entered.
- If the View Batch by User option is enabled on the AR/Cash Batch Control window, to edit or delete another user's accrual dues credit or debit memo, you must have a Billing authorization level of four (4) or greater.

  To set the Billing authorization level, select System Setup > Security administration > Users, and make sure the Billing authorization level is set accordingly.

Credit memos for accrual dues

Use credit memos to perform the following tasks:

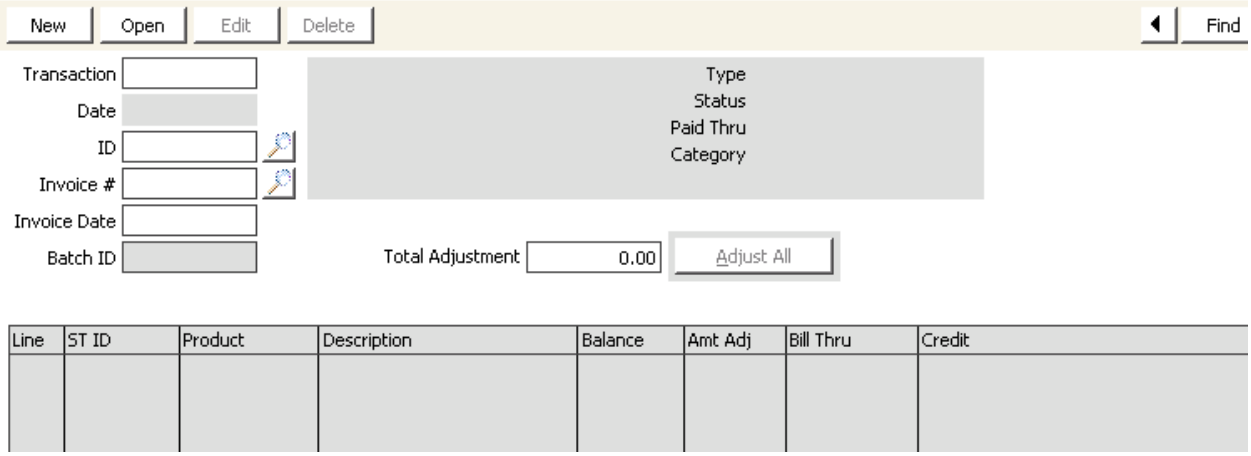
- Write off an open item that cannot be collected
- Reduce or reverse a line item charge
- Reverse a previously entered transaction
- Record product returns and credit the customer

  You can process reversals of open accrual dues items on a line-by-line basis on the Enter and edit credit memos window. After the credit memo is processed, the balance reduction is reflected appropriately in the various inquiry windows.

  For example, if a customer cancels a single line item on a bill and pays for the remaining items, you should reverse the charge of the canceled item.

Note: Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR/Cash Enter and edit credit memos window, a message is displayed at the bottom of the window. See To process an accrual dues credit memo for information regarding processing accrual dues credit memos.

Enter and edit accrual dues credit memos window



Admin Console: Home > Membership and Dues > Enter and edit accrual dues credit memos
Desktop: Billing > Process accrual dues

Transaction

This field is automatically populated with the transaction number.

Date

Defaults to the current system date, or the batch date if you are using the batch control option

ID

Specifies the billed customer identification number or. You can also select the lookup icon to select a value.

Invoice #

Specifies the invoice number assigned to the billing transaction or select the lookup icon to select a value.

Invoice Date

This field is automatically populated with the invoice date when you enter a value in the Invoice# field.

Batch ID

This field is automatically populated with the batch number of the current, open batch if batch control is enabled on the AR/Cash Batch Control window.

Original Invoice Balance

Displays the total balance due from the original billing invoice. This option displays when a record is entered.

Total Adjustment

Displays the total amount to be adjusted for the line items as you select them.

Adjusted Invoice Balance

Displays the difference between the Original Invoice Balance and Total Adjustment fields. This option is displayed when a record is entered.

Adjust All button

Used to automatically mark the credit checkbox for all line items.

Line

This column displays all the Invoice_Lines.LINE_NUM fields associated with the Invoice Number.

ST ID

This column displays all the Invoice_Lines.ST_ID fields associated with the Invoice Number.

Product

This column displays all the Invoice_Lines.PRODUCT_CODE fields associated with the Invoice Number.

Description

This column displays the description of the product code. If the invoice is a List Bill, the name of the ST_ID will be concatenated with the product title (for example, Bill Smith, Basic Dues).

Balance

This column displays all Invoice_Lines.BALANCE fields associated with the Invoice Number.

Amt Adj

This column displays the dollar amount to be adjusted from this line item. Entering an amount in this field then tabbing automatically marks the Credit checkbox.

Bill Thru

This column displays all Invoice_Lines.BILL_THRU fields associated with the Invoice Number.

Credit

Select to select a line item to be credited in full.

To process an accrual dues credit memo

You can process reversals of accrual dues items on a line-by-line basis through the Enter and edit accrual dues credit memos window. For example, if a customer cancels a single line item, you can reverse that one line.

> **Note:** Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any income recognized for this product during the GL Interface procedure. For more information, see Using Deferred Income.

1. From Enter and edit accrual dues credit memos window, click New.

The Date field defaults to:

- Batch date if Batch Control is used.

  If Batch Control is enabled and an active open batch is not selected, the Batch Control List is displayed. Select or create a batch and click New.

  If Batch Control is enabled and an active open batch is selected, the Date field is populated with the date of the batch.

- System date, if Batch Control is not used

  If the system date is overridden, the new date becomes the default value for inserts until the window is closed and reopened.

2. Enter an ID or select the lookup icon to find a customer's record. After the ID field is populated, an address block for the customer displays at the top of the window and the fields labeled Type, Status, Paid Thru, and Category populate. The calculated address block contains a concatenation of the full name, title, company, and full address.

   Note: The CATEGORY field displays prefixed with the label Category if your administrator has enabled the Use Bill Categories option. If this option is not enabled, neither the category value nor the category label will display.

3. Tab to the Invoice Number field.

- Enter the accrual billing invoice number and press Enter, or
- Select the lookup icon to select an invoice.

  Invoice or reference numbers are validated for the following:

- Invoice.SOURCE_SYSTEM is equal to DUES and at least one Invoice_Lines row is linked to the invoice.
- The Invoice.BT_ID is equal to the ID entered for the credit memo.

4. After the invoice number is entered, select from the following options:

- Click Adjust All to select all line items to credit.

The balance amount displays in the Amt Adj field and the Credit option is selected for each line item.

- Select the Credit option to credit specific line items. For example, select this option for Line 2.

  The balance amount displays in the Amt Adj field.

- Enter an amount to credit in a line item's Amt Adj field. For example, enter 100.00 in the Amt Adj field for Line 1.

  This will automatically enable the Credit option:

5. Click Save to update the record.

   The Total Adjustment field displays the total amount of the credit memo. Line items not adjusted are no longer displayed on the window.

To find an accrual dues credit memo using a transaction number

1. From Enter and edit credit memos window.
2. Click Find or Open.
3. Enter the transaction number and press Enter.

   iMIS verifies that the transaction number is the correct type based on whether Trans.SOURCE_SYSTEM is equal to DUES and Trans.JOURNAL_TYPE is equal to CM. If the transaction number is not correct, a message is displayed informing you that the transaction could not be located.

   > **Note:** Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR Enter and edit credit memos window, a message is displayed at the bottom of the window. See To process an accrual dues credit memo for details.

   To find an accrual dues credit memo using a transaction date

1. From Enter and edit accrual dues credit memos window, click Find or Open.
2. Tab to the Date field and enter a valid date, for example, 04152001, and press Enter.

iMIS builds a list of potential matches, looking for a match with that date and of the correct type (Trans.SOURCE_SYSTEM is equal to DUES and Trans.JOURNAL_TYPE is equal to CM). If no transactions are found, a message is displayed informing you that no transactions match your criteria.

The most recent transaction to meet the criteria is displayed. If there is more than one transaction that meets the criteria, the most recent transaction is displayed and the Left arrow is activated. After viewing the previous transaction, the Right arrow is activated, allowing you to scroll through all transactions based on the date entered (Trans.SOURCE_SYSTEM equal to DUES and Trans.JOURNAL_TYPE equal to CM).

> **Note:** Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR Enter and edit credit memos window, a message is displayed at the bottom of the window. See To process an accrual dues credit memo for details.

To find an accrual dues credit memo using the customer ID

1. From Enter and edit accrual dues credit memos window, click Find or Open.
2. Tab to the ID field, enter a valid ID, and press Enter.

   iMIS will build a list of potential matches, looking for a match with that ID and of the correct type (Trans.SOURCE_SYSTEM is equal to DUES and Trans.JOURNAL_TYPE is equal to CM). If the ID is not correct, a message is displayed informing you the transaction could not be located.

   The most recent transaction to meet the criteria is displayed. If there is more than one transaction that meets the criteria, the most recent transaction is displayed and the Left arrow is activated. After you have viewed the previous transaction, the Right arrow is activated, allowing you to scroll through all valid transactions (Trans.SOURCE_SYSTEM equal to DUES and Trans.JOURNAL_TYPE equal to CM) based on the date entered.

> **Note:** Note: Accrual dues credit memos must be processed on the Billing Enter and edit credit memos window. If you attempt to process an accrual dues credit memo from the AR Enter and edit credit memos window, an error displays at the bottom of the window. See To process an accrual dues credit memo for details.

If more than one Find criteria is entered, iMIS will search on the following:

- Transaction number first, if populated, and ignore the other search criteria.
- Date second, if populated, and ignore the ID.
- ID third, if both Transaction and Date are blank.

To edit an accrual dues credit memo with Batch Control enabled

You can edit an accrual dues credit memo only if it has not been exported through a General Ledger interface. After this occurs, Trans.POSTED is equal to 4, and you will not be able to edit the credit memo.

1. From Enter and edit accrual dues credit memos window, find an accrual dues credit memo.
2. Click Edit.

   Note: If a batch is not selected, iMIS will ensure that the batch containing the credit memo is still in an open state and then open the Batch window.

   If a batch is selected, but is not the batch containing the credit memo, a message is displayed asking you to confirm loading a batch other than the one selected. Click No to cancel the edit or click Yes to proceed. Before changing the batch, iMIS will ensure that the batch is still in an open state. If the batch is not open, a message is displayed informing you that the batch is not open and cannot be edited.
3. Tab to the Amt Adj field to edit the amount.
4. Click Save.

To cancel an accrual dues credit memo with Batch Control enabled

You can cancel an accrual dues credit memo only if it has not been exported through a General Ledger interface. After this occurs and the Trans.POSTED_FLAG is equal to four, you will not be able to edit the credit memo.

1. From Enter and edit accrual dues credit memos window, find an Accrual Dues credit memo.
2. Click Delete.

- If a batch is not selected, iMIS will ensure that the batch containing the credit memo is still in an open state, open the Batch window, and ask you to confirm the deletion. Click Yes to delete the transaction or click No to cancel the deletion.
- If a batch is selected, but is not the batch containing the credit memo, a message is displayed asking you to confirm loading a batch other than the one selected. Click Yes to proceed. Before changing the batch, iMIS will ensure that the batch is in an open state. If the batch is open, a message is displayed asking you to confirm the deletion. Click No to cancel the delete or click Yes to delete the transaction. If the batch is not open, a message is displayed informing you that the batch is not open and cannot be edited.

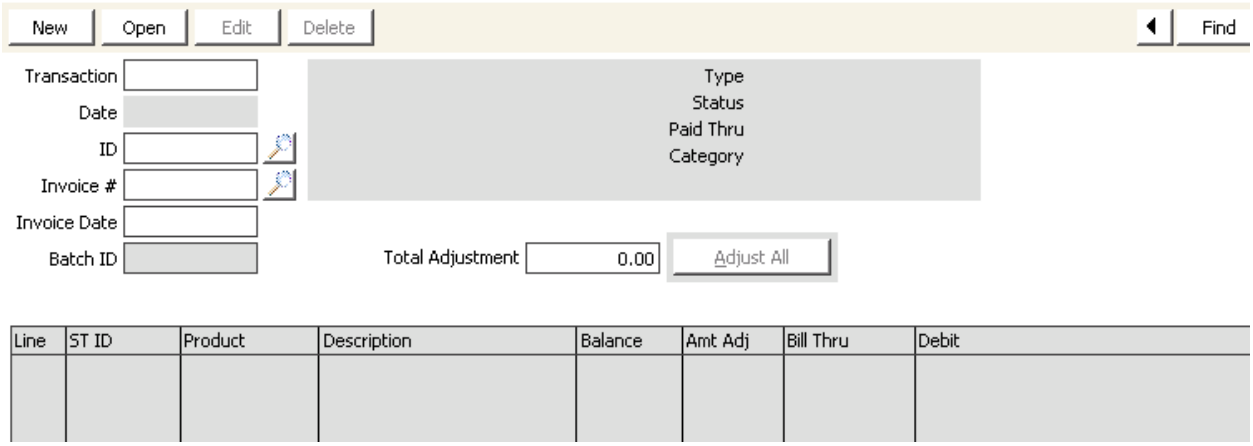
Debit memos for accrual dues

Use debit memos to perform the following tasks:

- Increase a line item charge
- Bring a credit balance to zero due to an overpayment, credit memo, or cancellation transaction

Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any recognized for this product during the GL Interface procedure. For more information, see Using Deferred Income.

Enter and edit accrual dues debit memos window



Admin Console: Home > Membership and Dues > Enter and edit accrual dues debit memos
Desktop: Billing > Process accrual dues > Enter and edit debit memos

Transaction

This field is automatically populated with a transaction number.

Date

Defaults to the current system date, or the batch date if you are using the batch control option.

ID

Enter the customer identification number or, if a company is responsible for the payment, enter the company ID in this field. You can also select the lookup icon to select a value.

Invoice Number

Specifies the invoice number assigned to the transaction or select the lookup icon to select a value.

Invoice Date

The current date automatically displays in this field when a record is entered.

Batch ID

Displays the batch number of the current open batch if batch control is enabled on the AR/Cash Batch Control window.

Original Invoice Balance

Displays the total current balance of the original invoice.

Total Adjustment

Displays the total amount to be adjusted for the selected line items.

Adjusted Invoice Balance

Displays the Original Invoice Balance plus the Total Adjustment field. The value in the Total Adjustment field is typically a negative amount and is therefore deducted from Original Invoice Balance. If Total Adjustment is a positive amount, it is added to Original Invoice Balance.

Adjust All

Used to automatically debit all line items. This button can be used if the overall balance is negative.

Line

This column displays all Invoice_Lines.LINE_NUM fields associated with the Invoice Number.

ST ID

This column displays all the Invoice_Lines.ST_ID fields associated with the Invoice Number.

Product

This column displays all the Invoice_Lines.PRODUCT_CODE fields associated with the Invoice Number.

Description

This column displays the description of the product code. If the invoice is a List Bill the name of the ST_ID will be concatenated with the product title, for example, Bill Smith, Basic Dues.

Balance

This column displays all Invoice_Lines.BALANCE fields associated with the Invoice Number.

Amt Adj

This column displays the dollar amount to be adjusted from the specified line item. Entering an amount in this field automatically enables the Debit option.

Bill Thru

This column displays all Invoice_Lines.BILL_THRU fields associated with the Invoice Number

Debit

Select to have the line item debited.

To process an accrual dues debit memo

You can process reversals of accrual dues items with a credit balance on a line-by-line basis through the Billing Enter and edit debit memos window. For example, if a customer overpays an invoice and you do not intend to refund the overpayment, you should process a debit memo for that amount.

> **Note:** Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any income recognized for this product during the GL Interface procedure. For more information, see Using Deferred Income.

1. From Enter and edit accrual dues debit memos window, click New.

   The Date field defaults to:

- Batch date if Batch Control is used.

If Batch Control is enabled and an active open batch is not selected, the Batch Control List is displayed. Select or create a batch and click New.

If Batch Control is enabled and an active open batch is selected, the Date field is populated with the date of the batch.

- System date, if Batch Control is not used

  If the system date is overridden, the new date becomes the default value for inserts until the window is closed and reopened.

2. Press Tab and enter an ID or select the lookup icon to find a customer's record.

   After the ID field is populated, an address block for the customer displays in the upper right-hand corner and the fields labeled Type, Status, Paid Thru, and Category are populated.

   The calculated address block contains a concatenation of Name.FULL_NAME, Name.TITLE (if Use Title is enabled for the preferred mailing address type), Name.COMPANY (if Use Company is enabled for the preferred mailing address type), and Name.FULL_ADDRESS.

   Note: Name.CATEGORY displays prefixed with the label Category: as long as the Use Bill Categories option is enabled on the Customer Setup - Basic Options window. If this option is not enabled, neither the category value nor the category label will display.

3. Tab to the Invoice Number field.

- Enter the invoice number and press Enter, or
- Select the lookup icon and select an invoice:

  Invoice or reference numbers are validated for the following:

- Invoice.SOURCE_SYSTEM is equal to DUES and at least one Invoice_Lines row is linked to the invoice.
- The Invoice.BT_ID is equal to the ID entered for the credit memo.

4. After the invoice number is entered, select from the following options:

- Select Adjust All to select all line items to debit.

  The balance amount times -1 displays in the Amt Adj field and the Debit option is selected for each line item.

  Note: Adjust All is available only when the overall balance is negative.

- Select the Debit option to debit specific line items.
- Enter an amount to debit in the line item's Amt Adj field.

5. Click Save to update the record.

   The Total Adjustment field displays the total amount of the debit memo and line items not adjusted are no longer displayed on the window.

   After an accrual dues debit memo is applied to an invoice, the Transaction Ledger displays the detail for each amount adjusted.

Billing: Set up module

The general system setup sets overall defaults and operating guidelines. There are many ways to customize the billing process, which allow you to group customers by category, define the product line items that can be billed to customers, and set pricing according to information stored in the customer's data tables or by using a formula.

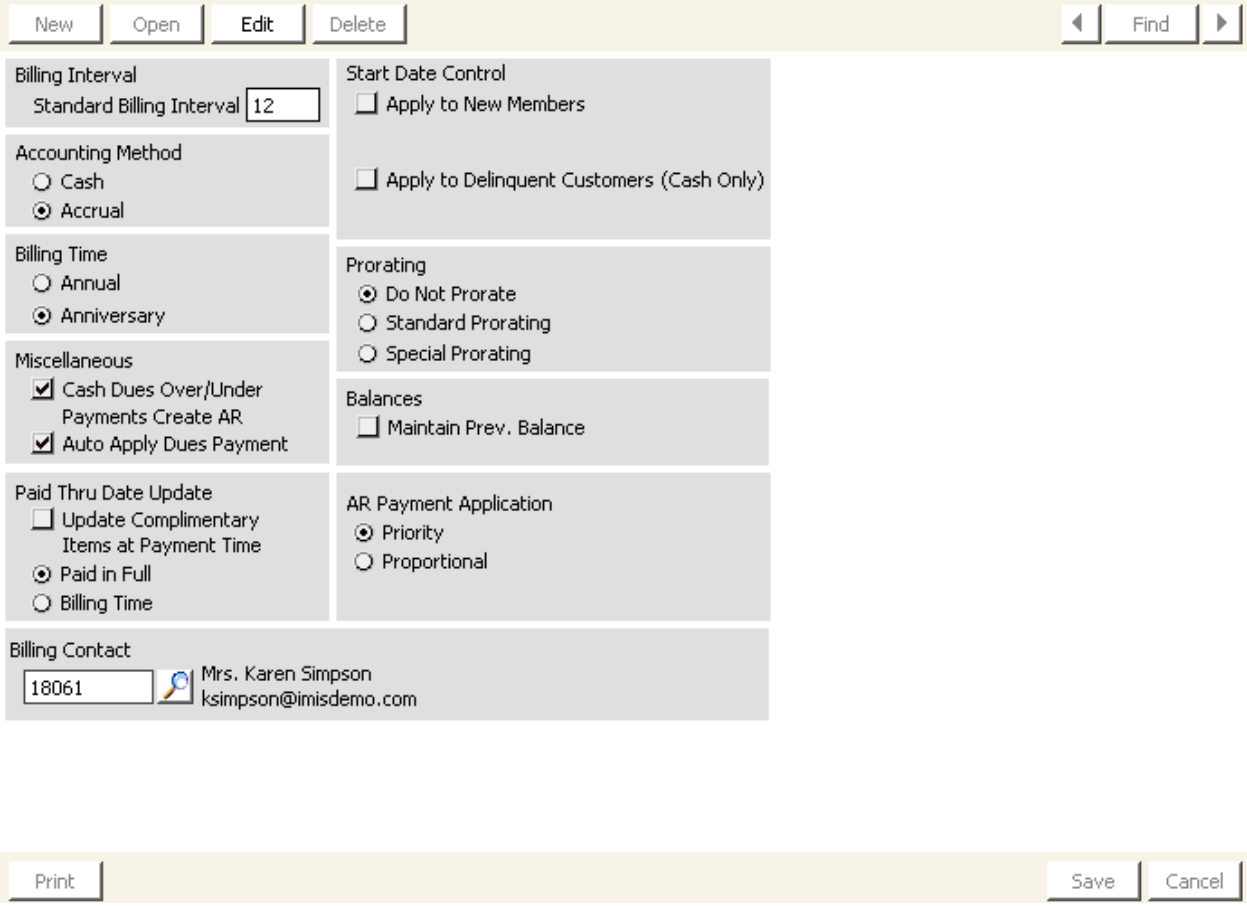
Before a billing cycle is run or a payment is entered, you must define how to bill.

See AR/Cash: Deferred Income for how to defer dues/subscriptions income and events/exhibition/exposition income.

Defining general setup options

The default options that you specify on the Set up general options window are used throughout the iMIS Billing module. The options that are displayed on the Set up general options window will vary according to the accounting method you select.

Configure billing options window



Admin Console: Configure > Billing > Configure billing options

Desktop: From Billing, select Set up module > General options

Billing Interval

Standard Billing Interval - The billing interval controls the frequency with which you will normally generate bills. You can override the billing interval at the individual customer level, at the product level, or at the individual subscription level. Choose the billing interval as a number of months from 1(monthly), 2(bimonthly), 3(quarterly), 6 (semi-annual), 12 (yearly), or 24 (every 2 years).

Note: Note: The number entered in the Standard Billing Interval field affects billing rates. Unless the billing interval is overridden at the product level, the dollar

> amounts entered for the products should be in accordance with the Standard Billing Interval.

Accounting Method

- Cash - Enable this accounting method to set up the billing system to recognize income when payment (cash) is received regardless of when bills or invoices were generated. The cash method is preferred for the Billing module.
- Accrual - Enable this accounting method to recognize income by creating open accounts receivable items when bills and invoices are generated.

> **Note:** Note: After you change the accounting method, you must restart iMIS Desktop and ensure that your iMIS Administrator stops and restarts all websites that contain your iMIS 15 applications in order to see the changes in the left navigation area.

> **Note:** If restarting the websites is problematic, you can wait for the cache to refresh (default is 15 minutes wait time, designated by the refresh cache interval), and then your changes appear.

Start Date Control

> **Note:** Note: If there are no Start Date Control options implemented, the New Bill From field on the Dues/Subscription Payments window (from Billing, select Enter and edit payments) defaults to the first day of the current month. See Date Usage in iMIS.

Determines whether the Bill Begin date should be advanced by one month. Start Date Control can be used to advance the start date of newly billed items or to specify a grace period for delinquent customer products. If implemented, the Bill Begin date will be controlled according to the following options:

- Apply to New Members - This option enables you to automatically advance the subscription begin date for new customers according to the parameter set in the Advance Start Month as of field.
- Advance Start Month as of - (Displays once you enable the Apply to New Members or Apply to Delinquent Customers option.) This option is a user-defined parameter used with the Apply to New Members option to allow you to set a specific day of the month on which to advance the begin date for new customers. Valid entries range from 0-28. If the value is 0 or 1, the Bill Begin date will always advance to the beginning of the next month.

  For example, if the Advance Start Month as of field is set to 15 and the Apply to New Members option is enabled, all new customers joining on August 15 will have their billing Begin Date set to 09/01.
- Apply to Delinquent Customers - (Applies to Cash basis and Anniversary items only) This option allows for the calculation of a new billing term when payment is posted to an existing billing record after the Bill Begin date. The new term begin date is determined by the value of the Advance Start Month as of field. If the value is 0 or 1, the new term will always advance to the beginning of the next month.
- Grace Period in Months - (Applies to Cash basis and Anniversary items only and displays only when the Apply to Delinquent Customers option is enabled.) This option refers to the grace period that is allowed for payment after the Bill Begin date.

  For example, the Advance Start Month as of field is set to 15, the Apply to Delinquent Member option is enabled, and the Grace Period in Months is set to 3. A customer with a Paid Thru date of 12/31/2001 is billed for a renewal term of 01/01/2002 to 12/31/2002. The customer does not pay until 04/15/2002. The payment transaction date of 04/15/2002 exceeds the Bill Begin date of 01/01/02, and it also exceeds the three-month grace period from the Bill Begin date of 01/01/2002. Therefore, a new product term will be calculated by comparing the payment transaction date to the value of the Advance Start Month as of field. In this example, the payment transaction date of 15 is equal to the value set in the Advance Start Month as of field, and the new term will be calculated as 05/01/2002 to 04/30/2003.

Billing Time

The billing time is a method selected to control the start and end time of a customer or product term.

- Annual - Fixed annual customer term. All customers have the same billing term. The customer term may coincide with the calendar year (January-December) or fiscal year (begin in any month). Annual fees are commonly prorated for new customers. Different prorating rules apply depending on when a customer joins. For example, if new customers join in July and you renew annually on the calendar year, you might want to prorate their fees by 50 percent.

  Note: If you select Annual as the billing time, you will need to set up the first month of the fixed term or fiscal year on the AR/Cash Set up module window (from AR/Cash, select Set up module). Enter the calendar month (numeric) that represents either your fixed term or fiscal year in the First Month of Fiscal Year (Number) field. The value in the First Month of the Fiscal Year (Number) field auto-populates the Effective Date. If this field does not have a value greater than zero, then the Effective Date must be manually entered on the Process billing window (from Billing, select Process billing).

- Anniversary - Individual renewal date that fluctuates based on each customer's Join Date. For example, if a customer joins on July 1, his or her term would be from July 1-June 30 of the following year. If you select an anniversary billing time, terms will initially default to a year (or other specified billing interval) from the Join Date, if it exists, or the Effective Date you specified during billing.

  Miscellaneous

  Cash Dues Over/Under Payments Create AR - When you enable this option, overpayments are tracked in the AR/Cash system to allow the credit to appear on the Credit Invoices window (from AR/Cash, select Process month-end-procedures, and click Credit Invoices). Underpayments are also tracked in AR by considering the item fully paid and maintaining an outstanding balance. Overpayment or underpayment to AR creates an open credit or debit item for that customer. For example, if the customer paid $150 and had been billed $100, a payment of $150 can be entered but only $100 applied. iMIS

would create an open credit of $50 for that customer in AR. A full payment of line items advances the Paid Thru date on those items. Credit (overpayments) and outstanding debit (underpayments) balances are maintained by the AR system. In Billing, the item will be treated as fully paid.

Auto Apply Dues Payment - This option is enabled by default. When you disable this option, dues payments are not applied automatically.

Prorating

Prorating applies only to organizations that bill on an annual or fixed-term basis, as opposed to an anniversary or rotating-term basis.

- Do Not Prorate - Enable to specify that fees are the same regardless of when a customer joins the organization.
- Standard Prorating - Enable to specify a global setting that prorates all products for the current year (depends on the billing interval). The following example relates to a billing interval of 12. If a customer joins during a term, iMIS reduces the initial fees based on a standard 12-month calculation. For example, if a customer joins in month 7 and the annual fees are $200, the calculated fees would be 6/12 of the total fees, or $100.
- Special Prorating - Enable to specify user-defined prorating rules according to the needs of your organization. This rule is a per product setting and must be defined and assigned to individual products. Specify prorating rules on the Prorating window (from Billing, select Set up module > Products, and click Prorate Rules). See Defining Prorating Rules for detailed information.

Balances

Maintain Prev Balance -If this option is enabled, iMIS maintains the previous balances on customers who have made a partial payment or no payment. Previous balances are usually maintained in conjunction with a low Standard Billing Interval. For example, if annual fees were $100 and the customer paid only $80, iMIS would retain a balance of $20. When the customer is billed next year, iMIS would add the previous balance of $20 to the customer's total balance.

Note: Note: The Maintain Prev Balance option applies only to cash-based dues. For accrual-based fees, previous fee balances can be viewed in the individual's AR window because accrual fees billings create invoice records. The PREVIOUS_ BALANCE field in the Subscriptions table will not be populated for an accrual fees billing even if the Maintain Prev Balance option has been checked.

Note: Note: The Maintain Prev Balance option must be enabled for a _CREDIT (user-defined credit) to display on a Renewal Notice.

Note: Note: This option does not apply to voluntary contributions (VOL).

Paid Thru Date Update

The options set in this section set the preference for when the Paid Thru date information is to be updated. The Paid Thru date for the cash accounting method is updated with payment in full.

- Update Complimentary Items at Payment Time - Enable to specify that the Paid Thru date for complimentary items (no charge products) be updated at payment time instead of billing time.
- Paid in Full - (This option displays when the Accrual accounting method is enabled.) Enable to specify that the Paid Thru date be updated when full payment of the associated line item is received.
- Billing Time - (This option displays when the Accrual accounting method is enabled.) Enable to specify that the Paid Thru date will be updated when the initial accrual fees billing is performed.

AR Payment Application

(This option displays when the Accrual accounting method is enabled.) Enable to sets the preference for distribution of partial payments across multiple-fee line items on the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions> Cash

receipts). This option allows the choice of whether a partial payment will be applied based on priority established at the product code level or evenly distributed across each fee-based product billed.

- Priority - (default) Enable to apply payments to each open line item in payment priority order until all open line items are paid. If no pay Priority has been set for the products defined on the Set up products window (from Billing, select Set up module > Products), partial payment will be applied to products in alphabetical order.
- Proportional - Enable to apply payments across all the open line items in direct proportion to each line's amount.

Billing Contact

Enter the iMIS ID for the person who would like to receive an email message each time someone makes a Billing-related purchase. The email messages is similar to the one the Event Contact receives for an Event purchase.

To set up general billing options

1. From Configure billing options window, click Edit.
2. Enter the Standard Billing Interval in months.
3. Select a Billing Time.
4. Select an appropriate Prorating option.

   Note: Prorating applies only when you want to bill on an annual or fixed-term basis, as opposed to an anniversary or rotating term basis. If billing is done for all products (for example, all fees and product billings) on an anniversary basis, you must enable the Do Not Prorate option.
5. Select an Accounting Method. If Accrual is selected, additional options display in the Paid Thru Date Update section and the AR Payment Application section displays. You must make selections in these areas.
6. (optional) Enable the Update Complimentary Items at Payment Time option if you want to advance the Paid Thru date of complimentary products at payment time instead of at

billing time.

7. (optional) Select the Start Date Control options to advance the Bill Begin day by one month and create a new billing term.
8. Enable or disable the Cash Dues Over/Under Payments Create AR option.
9. Enable or disable the Maintain Prev. Balance option.
10. Click Save.

    Caution! If Annual is chosen as the Billing Time, be sure to open the AR/Cash Set up module window (from AR/Cash, select Set up module) and enter the calendar month (numeric) that represents either your fixed-term or fiscal year in the First Month of Fiscal Year (Number) field.

    Caution! If Special Prorating is selected, define the product codes as discussed previously and then see Defining Prorating Rules to establish the special prorating table rules.

Creating billing cycles

The final step for Billing setup is to define the necessary billing cycles. The steps for defining billing cycles include the following:

1. Create a new cycle name/edit a current cycle
2. Select whom to bill
3. Select what to bill
4. Define how to present the bill
5. Select how and when to bill

A billing cycle is another name for a billing run. Define a billing cycle to bill a particular group of people for a particular set of products. Two general groups of billing cycles can be set up:

Customers dues billing

A billing run used to collect dues for a given set of customers sorted by type, category, or both.

- The Add Member Type Items option on the Set up billing cycles window must be checked. Selecting this checkbox indicates the billing cycle is a dues product billing.
- The overall customer Paid Thru dates and Renewed Thru dates are used to determine who should be billed.
- The customer Join Date month is used to determine the customer term beginning date (anniversary date) for new customers.
- This billing run will automatically bill all items cross-referenced on the Set up customer types to all customers who are selected for billing. Do not select the same dues products that are listed on the Set up customer types window from the scrolling product list on the Set up billing cycles window.
- This billing run will bill only non-customer type products selected on the cycle if an active subscription record already exists for the customer. For example, Include all sections, Include all chapters, and any items selected on the scrolling product list.
- All line items will bill uniformly for the same customer term (for example, beginning date and number of months) based on the value in the Renewal Months field on the Financial tab on the Manage customers window if nonzero, the value in the Renewal Months field on the Set up products window, or the overall system setup Standard Billing Interval setting.
- Can bill for all chapters and/or all sections.

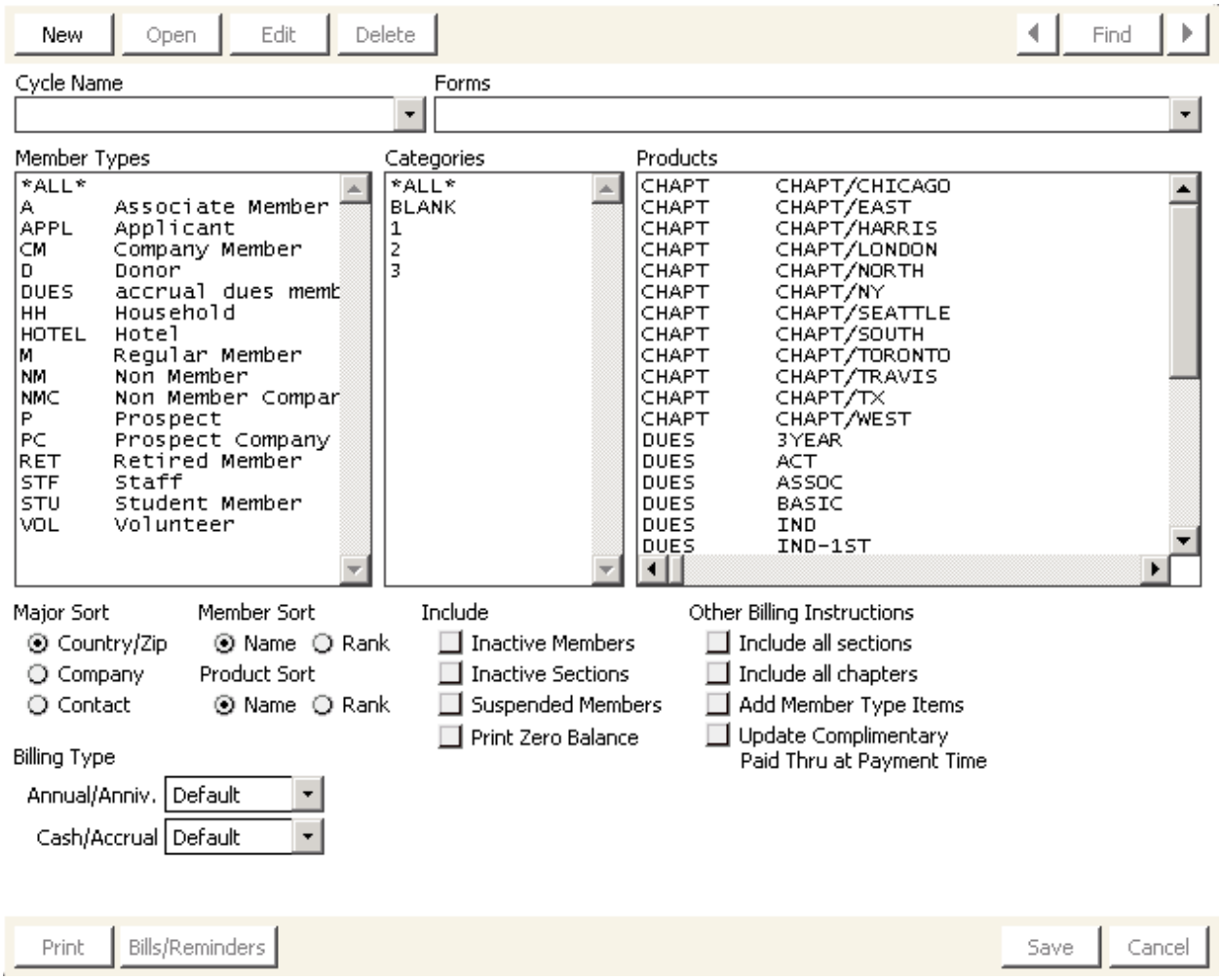
Non-dues billing

A separate billing run used to collect payments for optional subscriptions for customers or non-customers.

- The Add Member Type Items option on the Set up billing cycles window must not be enabled (checked).

- Evaluates individual subscription line items' Paid Thru and Billed Thru dates in determining whom/what to bill.
- The Subscription Date Added is used to determine the subscription term beginning date for new subscribers.
- This billing run will bill only items chosen on the cycle if an active subscription record already exists for the subscriber. For example, Include all sections, Include all chapters, and any items selected on the scrolling product list.
- Each item's term (number of months) will be calculated independently based on the first nonzero setting of the individual's subscription Billing Period, the product Renewal Months, the subscriber Renew Months (Financial tab), and the overall system setup Standard Billing Interval.

Set up billing cycles window



Admin Console: Configure > Billing > Set up billing cycles

Desktop: Billing > Set up module > Billing cycles

Cycle Name

Indicates the designated name for the group of records from which renewal notices will be generated. This name displays on the Process billing window with a list of available cycles.

Forms

Drop-down list of renewal notice formats

Member Types

A list of available customer types available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (selects range) while you select your selections. To bill all customer types, select *ALL* at the top of the scrolling list. For example, for a subscription cycle where the subscription can be purchased by any customer, select *ALL*.

Categories

A list of categories available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (sequential range) while you select your selections. To bill all categories of customers or subscribers, select *ALL* at the top of the scrolling list. If BLANK is selected, only customers or subscribers with a blank or empty category will be selected.

Products

A list of products available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (sequential range) while selecting other selections. Products selected in this list will be billed only if an active subscription line item already exists for the customer.

For dues product billing, only select products that are optional add-on items to the mandatory or regular dues products. The Add Member Type Items option must enabled. If the Add Member Type Items option is enabled, all products listed on the Set up customer types window for the customer types selected will be billed automatically during this billing cycle. These customer type-referenced products should not be selected on the scrolling list.

Shortcut - To select all chapters (CHAPT) and sections (SEC), enable the Include all sections and Include all chapters options located in the Other Billing Instructions section.

Major Sort

This option specifies the order in which the bills are sorted for printing. The choices include Country/Zip (postal code), Company (company sort), and Contact (individual's last name, first name).

Member Sort

This is used only for list bills (where the dues and/or subscription products for several individuals or branches are itemized on a single bill and sent to a single parent company or a third party). It establishes the order in which the individuals (Ship to) are listed on the list bill. You can sort by Name (last, first) or Rank (under development for a future release).

Product Sort

This option controls the order of the line items on the dues bill. Select Name (to sort alphabetically by product code) or Rank (to sort by the payment priority shown on the Set up products window).

Include

Specific options that are included in the billing cycle, when enabled.

- Inactive Members - Enable to bill customers whose status begins with I (inactive).
- Inactive Sections - Enable to force the billing of SEC-type subscription in which the subscription's status begins with I (inactive).
- Suspended Members -Enable to bill customers whose status begins with S (suspended).
- Print Zero Balance -Enable to print bills with zero balances. For example, if you enable this option, iMIS will generate a bill for a customer who receives a complimentary (zero dollar amount) membership. Not enabling this option causes iMIS to bypass all zero balance bills during the printing process.

  Note: This option applies only to bills with a total balance of zero. To suppress the printing of individual zero balance line items when the grand total is nonzero, see the SUPPRESS_ZERO_ITEMS print options.

Other Billing Instructions

Include all sections -Bills all active subscription records of the product type SEC for the customer types selected. If multiple sections exist, all sections will be included.

Include all chapters -Bills active subscription records of the type CHAPT for the customer types selected. If multiple chapters exist, all chapters will be included.

Add Member Type Items -Use for dues billing. This option bills customers for all product codes defined on the Set up customer types window. If this option is enabled, select only those items in the Products list not covered on the Set up customer types window or by the options Include All Sections and Include All Chapters.

> **Note:** Note: When Add Member Type Items is selected, new subscription records will be created only for items included on the Set up customer types window. All other products selected for the dues billing cycle will be billed only if an existing active subscription record already exists for that customer. The Add Member Type Items option must be enabled for dues billing and should not be enabled for non-dues product billing.

Update Complimentary Paid Thru at Payment Time - When enabled, allows the Paid Thru date for complimentary items (no charge products) for this billing cycle to be updated at payment time instead of billing time. During dues billing, iMIS first checks the billing cycle, then the Set up general options window, to determine how to handle complimentary item Paid Thru dates.

Billing Type

Annual/Anniv - Drop-down list used to select when the billing cycle should be billed (Annual or Anniversary) or to retain the default setting. iMIS defaults to the setting specified on the Set up general options window. You may want to change the setting if you bill dues products annually and subscriptions by anniversary.

Cash/Accrual - Drop-down list used to select the accounting method of Cash or Accrual or to retain the default setting. iMIS defaults to the setting specified on the Set up general options window. You can select Cash or Accrual if the default accounting method on the Set up general options window is set to Accrual. If you try to set the billing cycle accounting method to Accrual when the dues product accounting method system default is Cash, iMIS displays a message informing you that the accounting method system setup must be changed to Accrual.

Bills/Reminders

Opens the Billing and Reminder Notices window where you can specify when iMIS should send first and second reminder notices to the customers included in the billing run.

To create a new billing cycle

1. From Set up billing cycles window, click New.
2. Enter the name of the billing cycle in the Cycle Name field.
3. Select whom to bill.

1. Select the customer types to bill from the Member Types column.
2. Select the Categories to include for this billing cycle.
3. Enable the Other Billing Instructions options, if any.
4. Select the Products to be included in the bill. If you enable the Add Member Type Items option, do not select any customer type-referenced products from the scrolling list.
5. Define how to present the bill.

1. Select the drop-down Forms list to select the renewal notice format for this billing cycle.
2. Select the Major Sort option to be used to sort the order in which the bills are printed.
3. Select the Member Sort option to be used to order the individuals (Ship to) on the list bill.
4. Select the Product Sort option to be used to order the line items on the dues bill.
5. Enable the appropriate Include options, if any that also need to be billed.
6. Select the Annual/Anniv drop-down list, and select when the billing cycle should be billed (Annual or Anniversary) or retain the default setting. iMIS defaults to the setting specified on the Set up general options window.
7. Select the Cash/Accrual drop-down list and select the Cash or Accrual accounting method of or retain the default setting. iMIS defaults to the setting specified on the Set up general options window.
8. Click Save.

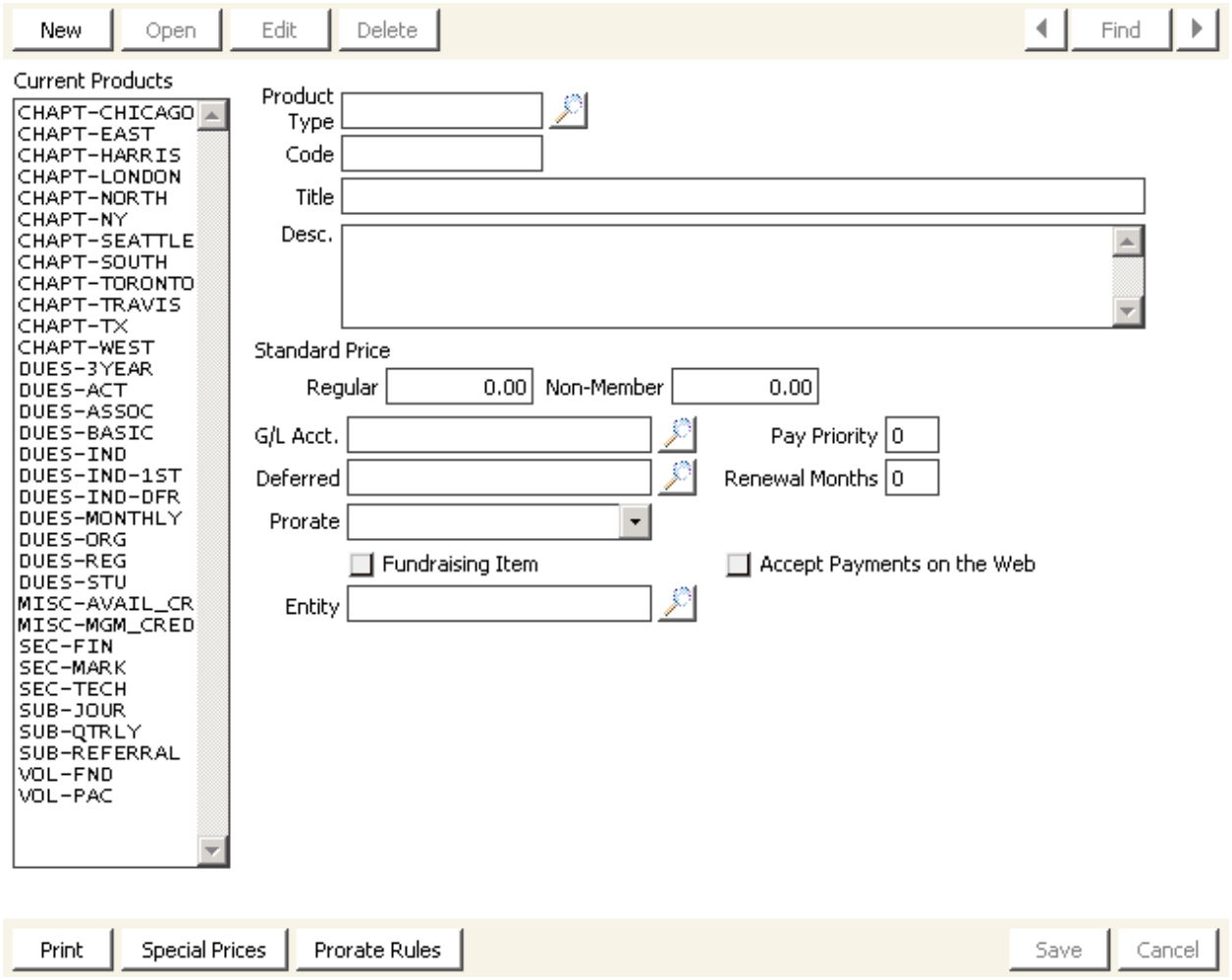
Defining product codes

The Set up products window is used to define or create product codes for products that will be billed or for which your organization collects money. The Set up products window defines product line items, default pricing, and entity and General Ledger account information.

Only products with defined product codes can be billed. One product code should be created for each potential dues or subscription-type product or service that will be billed. Unless General Ledger account numbers vary by Customer type, a single, primary membership dues product can be established.

> **Note:** Note: To determine a price for a given product, iMIS first looks to see if a price is set on the Special Pricing window. If no price is set on the Special Pricing window, iMIS then checks the Set up customer types window. If no price is set or the Comp option is not enabled on the Set up customer types window, iMIS then looks on the Set up products window.

Set up billing products window



Admin Console: Configure > Billing > Set up billing products

Desktop: Billing > Set up module > Products

Current Products

List of defined products.

Product Type

The product type is a system-maintained code that allows iMIS Billing to manage the relationships among files and other modules that are affected by billing.

- CHAPT - Separate dues for chapter or local groups - Use this code for separate chapter membership dues. Chapter products are created automatically when you insert entries on the Chapters window (from Customers, select Set up tables > Chapters) or when you populate the Chapter field on the Status tab in the Manage customers window. To allow chapter billing, a dollar amount must be assigned to the chapter product, either at the product level or at the special pricing level. If CHAPT is entered in the Product Type field, CHAPT is automatically populated in the Code field and a chapter can be entered in the Chapter field, which displays next to the Code field.
- DUES - Regular membership dues - Use this code for all normal membership dues items. This code normally is used for standard non-optional dues line items that are cross-referenced on the Set up customer types window.
- MISC - Reserved for miscellaneous charges. Normally, special pricing rules dictate the conditions for charging for a miscellaneous item.
  For example, special pricing rules that are based on the Join Date.
- SEC - Sections and specialty groups - Use this code for optional add-on section memberships such as professional specialty groups. Generally, this type would not be put on the Set up customer types window because SEC normally represents groups that are joined only by request. After a customer has subscribed to this product type, iMIS enables you to automatically bill for initial billing and renewals through cycle definition rules.
- SUB - Magazine/journal subscriptions - Use this code for optional subscriptions such as journals and magazines. This product type would not be put on the Set up customer types window because SUB items are optional. After a customer has subscribed to this product type, iMIS enables you to automatically bill for initial billing and renewals through cycle definition rules.
- VOL - Voluntary contributions - Use this code for non-mandatory contributions such as PACs or foundations. VOL typically will be cross-referenced on the Set up customer types window; however, open items of this product type will not appear on Reminder Notices unless non-voluntary items within the same cycle still have open balances.

  Label Preference

Displays when Use Product Label Preferences is enabled on the Customer Setup - Address and Notes window.

Code

Specifies a key word that identifies the Product. The code entered should not contain any spaces or special characters other than an underscore (_), and should contain no more than 15 alphanumeric characters. This code is used in the Billing Codes field on the Set up customer types window. Select the lookup icon to search field values.

> **Note:** Note: Product codes that end in _Credit can bill and retain negative or credit balances. For example, the code AVAIL_CREDIT can be used to apply over-payments to offset next year's dues.

Title

Enter a descriptive title of the Product Type in this field. When a billing item is referenced on data entry screens and Renewals Notices, the title will appear next to, or in place of, the billing code.

Desc.

(optional) Enter a detailed description of the product in this field.

Standard Price

Enter the default price for customers and non-customers. Unless the billing interval is overridden in the Renewal Months field, the dollar amounts entered for the products should be in agreement with the Standard Billing Interval set on the Set up general options window. For example, the rate for a product is $120 per year. Enter the flat rate of $120 when the Standard Billing Interval is 12 (every 12 months or annual), $10 when the interval is 1 (once per month), and $240 when the interval is 24 (every 24 months or 2 years).

Different rates for customers and non-customers can be entered.

- Regular - Default standard customer pricing. An entry in the Set up customer types window will override the Standard Price, and an entry in Special Pricing will override both customer-type pricing and Standard Price.
- Non-Member - Default non-customer pricing if there is no entry in Special Pricing or in the Set up customer types window.

> **Note:** Note: A dollar amount specified on the Set up customer types window will override the Standard Price for that particular customer type. Special pricing rules will override fee amounts defined on either the Set up customer types window or in the Standard Price section.

G/L Acct

Enter the general ledger account that will be credited when the payment is received or when the income is recognized. Select the lookup icon to search for values.

Pay Priority

Enter the order in which payments are applied to multiple billing product lines. This can be used to sort the line items during a product billing or on Renewal Notices. A lower number has a higher priority than a larger number. For example, a product with priority 1 will appear on the payment and renewal list before a product with a priority of 2.

Deferred

Enter the deferred income balance sheet account that should receive the credited amount. This option is available only when the system is licensed for the add-on Deferred Income module. A deferred income account should be entered if your system is licensed for the Deferred Income module and the income for this product type should be deferred and recognized during the customer or product term. Select the lookup icon to search for values.

Renewal Months

(optional) Indicates the number of months that the dues product type will be renewed for when payment is received. This number will override the Standard Billing Interval set on

the Set up general options window if the product is being billed on a non-dues cycle. The product's Standard Billing Interval will be used only for pricing determination on the dues billing cycle.

For example, an individual purchases a journal subscription as of 9/1/2001. The journal is set as a product with a rate of $45 for both customers and non-customers, with Renewal Months set at 60 months (five years). On a non-dues billing cycle, the journal line item will be billed for $45 with a Paid Thru date of 8/31/2006.

Accept Payments on the Web

(optional) Enable this option if you want line items billed for this product using the Cash accounting method to appear in the Public view under Contacts > Contact Management > Billing. See Billing setup for Public view for more information.

Prorate

Use this drop-down list to identify the Special Proration table for this specific product. These rules were defined through the Special Pricing window (see Defining Prorating Rules). This feature allows reduced rates for new customers who join after the annual customer term.

> **Note:** Caution! Do not select a prorating rule if the Do Not Prorate or the Standard Prorating option is selected on the Set up general options window (see Defining general setup options).

Entity/Fund

(optional) Specifies the financial entity to which income from this product is assigned. When the product is a standard product, the field is labeled Entity and the lookup list contains all org codes defined on the system. When the product is a fundraising product, the field is named Fund and the lookup list contains only those org codes that are defined as funds.

Fundraising Item

When selected, designates a fundraising product. Checking this box activates the Appeal, Campaign, and Fair Market Value fields and changes the Entity field to the Fund field.

Appeal

(Fundraising products only) Specifies the Fundraising appeal (if any) to which this product is tied.

Campaign

(Fundraising products only) Specifies the Fun Raising campaign (if any) to which this product is tied.

Fair Market Value

The fair market value, for tax purposes, of a fundraising product.

Subscription Info

(Displays only if you have the Advanced Subscription module installed and the product code is SUB). Opens the Publication Information window where you can enter Zone Table and Postal Sort information.

Special Prices

Opens the Special Pricing window where you can define pricing rules for products. See Defining Special Pricing for more details.

Prorate Rules

Opens the Prorating window where you can specify an amount to an activity or product that is proportional to some base.

To define a new product code

1. From Set up billing products window, click New.
2. Enter a Product Type.
3. Enter a Code that identifies the product.

4. Enter a descriptive Title for the billing product. This title will display on the customer's bill and on other windows.
5. (optional) Enter a detailed description in the Description field.
6. (optional) Set the Standard Price information. As a rule of thumb, if the product will be cross-referenced to a customer type through the Set up customer types window, do not enter an amount in the Standard Price area.
1. Enter the default standard customer pricing, if any, in the Regular field.
2. Enter the default non-customer pricing, if any, in the Non-Member field. Even if the same rate for customers applies to non-customers, enter the rate again in the Non-Member price field.
3. Enter the G/L Acct number. (Required for iMIS G/L interface users)
4. (optional) Enter the Deferred account number. This field is available only when iMIS is licensed for the Deferred Income module.
5. (optional) Select the appropriate prorating rule. See Defining Prorating Rules.

   Caution! Do not select a prorating rule if the Do Not Prorate option or the Standard Prorating option is selected on the Set up general options window (see Defining general setup options).

10. (optional) Select the Fundraising Item checkbox if the product is a fundraising product. When the Fundraising Item checkbox is selected, the Fair Market Value, Appeal, and Campaign fields are activated, and the Entity field is changed to the Fund field.
11. (optional) Choose the financial Entity or Fund.
12. (optional) For fundraising products, enter fundraising information (Appeal, Campaign, and Fair Market Value).
13. (optional) Enter the Pay Priority.
14. Enter the Renewal Months if you want to override the Standard Billing Interval set on the

Set up general options window.

15. Click Save.

Note: Chapter product codes are usually added on the Chapters window (from Customers, select Set up tables > Chapters). Pricing for CHAPT type products can be set on the Set up products window.

Note: If a product code will be linked to a customer types, the pricing for the product code should be set in the Dues Billing section on the Set up customer types window or on the Special Pricing window. Do not set the pricing for a mandatory product item on the Set up products window.

Defining the AVAIL_CREDIT product code

Open credits can be applied to future dues billing amounts. In this case, the credit is retained in the Billing system and is used to automatically offset overpayments against newly billed items on the next renewal billing. The overpayment will only be used against the main dues product (the product that is listed first on the Set up customer types window).

This automatic offset method can be used only in conjunction with a dues product billing cycle. To do this, a product code of AVAIL_CREDIT must be defined on the Set up product codes window.

> **Note:** Note: Any residual credit balance in AVAIL_CREDIT is offset against billing amounts billed automatically during the next dues renewal billing for the customer. Also, the appropriate accounting entry is created to debit (reduce) the AVAIL_CREDIT GL account and credit (increase) the GL account for the offset dues line items (for example, deferred or unrecognized income).

> **Note:** Note: The AVAIL_CREDIT feature is currently not supported by accrual dues cycles. All accrual dues cycles will operate as if the Don't Apply Credits option on the Process billing window is enabled.

Use the following steps to add the AVAIL_CREDIT product code:

1. From Billing, select Set up module > Products. The Set up products window opens with a list of products displayed in the Current Products column.
2. Click New.
3. Enter a Product Type or select the lookup icon to select a value.
4. Enter AVAIL_CREDIT in the Product Code field.
5. Enter a descriptive Title for the billing product. This title will display on the customer's bill and on other windows.
6. (optional) Enter a detailed description in the Description field.
7. (Required for G/L interface) Enter the G/L Acct number of the account that will hold the credit until it is applied.

   Caution! Do not enter the account number of the account that will hold the credit in the Deferred Account field.
8. Click Save.

Configuring VAT or GST for dues products

You can collect Value Added Tax or Goods and Services Tax as an additional product when billing dues.

> **Note:** Note: Pricing can be defined at the dues product level|topic=Defining product codes or, if it is a mandatory dues product, at the customer type|topic=Setting up customer types level.

> **Note:** To determine a price for a given product, iMIS first looks to see if a price is set on the Special Pricing window. If no price is set on the Special Pricing window, iMIS then checks the Set up customer types window. If no price is set or the Comp option is not enabled on the Set up customer types window, iMIS then looks on the Set up products window.

1. Create a Dues product for only the dues portion, such as $60.00 CAD.

2. Create a second Dues product that represents the tax portion of a total amount for dues. For example, if the main Dues product is $60.00 CAD, the second Dues product representing a 10% Goods and Services Tax should be a $6.00 CAD amount.
3. Depending on the way pricing is defined for you, set up the Special Pricing or the products in Customer Types.
4. Create a billing cycle that includes both Dues products.

Testing the setup

The best method for testing a Billing setup is to bill and rebill a single customer several times while changing any billing-related data between each iteration until each billing scenario has been tested satisfactorily. Ideally, run the test on a test system or, if a test system is not available, insert a single (temporary) customer record to use for testing purposes.

Testing the billing data generation and Renewal/Reminder Notice printing is outlined separately in the following sections.

To test the billing data generation

To test the billing data generation, use a new customer and follow these steps:

1. Make sure the test record has a customer type and category, if necessary. This is included in the specifications for the test billing cycle.

- If you are testing a non-dues product billing subscription cycle, or if you are testing the billing of optional line items on a dues billing cycle (for example, items not linked on the Customer types window), add the line item(s) on the Billing tab. See Running individual dues billing.
- Generate the initial billing data. See Running individual dues billing. (optional) Do not select any of the printing options for subsequent testing of the Reminder Notices.

2. Review the billing data in detail, verifying that the:

- Billing data was generated for all the line items that should have been billed;
- Amounts billed were correct for this particular record's scenario; and

- Billing term was accurate.

  Note: You can review the data by looking directly at the line item results on the Current view of the Billing tab. However, to check the billing term, you must double-click each line item to view the Dues/Subscription Item Detail window. The billing term is represented by the Period and Thru dates maintained in the Last Billed section.

3. If the billing data was generated incorrectly, investigate the problem and correct the setup area. Rebill after making the setup correction.
4. To test the next billing section, change one data element that would impact the generation of the billing data, for example:

- Customer type
- Billing category
- User-defined field related to special pricing formula
- Join Date for term testing (prorated term and amount, if annual billing)
- Renew Months on the Financial tab for shortened or extended term and amount testing
- Regenerate the billing data using the “Rebill” procedures as outlined in “Rebilling to Correct an Individual Dues Billing”. Leave all Printing Options unselected for subsequent renewal notice testing. If a customer type has been changed and the new customer type has different product code(s) linked to its Customer types window, follow the procedures in “To process and rebill customer type changes|topic=Rebilling to correct an individual dues billing”.

5. Verify the accuracy of the output. Repeat until all possibilities have been tested successfully. For certain special pricing formulas, it may be impossible to test all possibilities, but you should spot check enough variations to ensure that the formula is calculating accurately.

   To test the Reminder Notice printing

The Reminder Notice printing can be tested using the same customer record that was used to test the billing data generation:

1. Make sure the report destination (select Files> Report Destination) is set to the printer (not to screen) to be used to print the notices during a live run. To avoid layout and text placement distortions, never test the renewal notice by first printing it to the screen and then printing the screen output to the printer.

- Print the Initial Bill. As a guideline, see Running individual dues billing. If billing data already exists as a result of testing the generation of the billing data, leave all Billing Options unselected.

2. To experiment with a different format choice, select a different format from the Forms drop-down list on the Set up billing cycles window. If there is a problem with the text or the placement of the overlay text, edit the Report Specs parameters text. If a change is made in either of these areas or in the Billing and Reminder Title or the notice-specific text area, repeat to check the output.
3. Repeat, testing the First and Second Reminder Notices.

To test Dues billing Renewal Notices

1. Find a customer with one or more line items and a non-zero balance.
2. Select the Billing tab on the Manage customers window.
3. Click Create Invoice. The Dues Billing Selections window opens.
4. Select the Billing Cycle.
5. Select Initial Bill from the Print Options.
6. The Renewed Thru date on the Financial tab must equal the Name.PAID_THRU date on the Manage customers window.

Use the following examples to verify that the Renewed Thru date shown is correct.

Paid Thru	12/31/2001	12/31/2001	12/31/2002

Renewed Thru 12/31/2001 12/31/2002 12/31/2002

Note: Note: Accrual dates give other payment recognition options.

Billing Accounting

Billing system accounting rules

You can set up your billing accounting rules for cash basis or accrual basis. In addition, you can set up multiple entities.

Cash basis operations

Billing generates and updates open subscription records only. These records function as memo AR entries, with absolutely no accounting effect.

The Payment module performs the following activities:

- Updates accumulated payment amount, balance, and expiration or Paid Thru Date on an existing subscription file record. If no billing or payment activity has been recorded for the customer/billing item, a new subscription record is generated.
- Generates multiple-line Trans records, debiting cash and crediting appropriate income entries for all dues line items paid.
- If the appropriate system setup option is enabled, generates a transaction entry to AR and a corresponding Invoice table record for overpayments and, in some cases, under-payments. This occurs in conjunction with the credit invoices/refund function in iMIS.
- Generates activity records for each paid dues item.

Accrual basis operations

The following billing activities take place for payments made using the accrual accounting method:

- Billing generates paid-in-full subscription records and turns all further control and tracking over to the AR/Cash System.

- Each bill generates a multiple-line Trans table record debiting AR and crediting the appropriate income accounts for all billing line items.
- Each bill generates one open invoice record. This item appears with all other invoice items on standard AR system inquiries and reports (For example, trial balance, AR statements and AR account inquiry).

Payments

Payments are processed through the normal Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions > Cash receipts) instead of the standard Process billing window (from Billing, select Process billing). For more information on the entries generated and the tables updated, see Entering Direct Transactions.

Using multiple entities

You can choose to use more than one financial entity with the Billing module. Multiple entity processing is necessary when you keep more than one set of financial books.

Multiple entity processing is set up through the AR Cash module, but the association of specific Billing products with entities is accomplished using the Billing module.

You can combine products whose income is assigned to different entities within the same billing cycle. This can be used to keep the income of subsidiaries separate, or to keep fundraising and non-fundraising income separate while sending only a single bill to your customers.

Cash dues payments with multi-entity enabled

When a cash dues payment is made, the income for the payment is recorded using the following hierarchy:

- the product entity is used if defined, otherwise,
- the Billing module default entity (set up in AR/Cash) is used if populated, otherwise,
- the iMIS system default entity is used.

If the product is a Fund Raising item, a Gift activity is generated for each payment applied to a dues product.

Accrual dues with multi-entity enabled

The income for accrual dues items is recorded using the following hierarchy:

- the designated entity for that product is used if defined, otherwise,
- the Dues default entity is used if defined, otherwise,
- the system default entity is used.

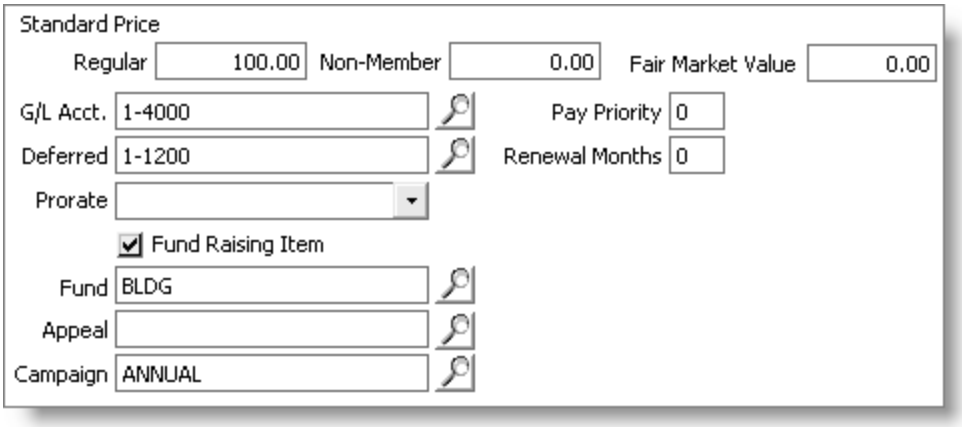
A Pledge activity is created for each separate dues Fundraising product when accrual dues are billed.

Fundraising Dues Items

Dues products can be flagged as Fundraising items. When a payment is made for a cash dues fundraising product, Fundraising data is recorded, Fundraising reports and summaries reflect the payment, and the appropriate level of Donor Club is awarded to the donor.

Dues Fundraising product set up

If you are licensed for Fundraising, you can flag a dues product as a Fundraising Item and can designate the Fair Market Value, Appeal, and Campaign for the item. If you have multi-entity enabled, you can also designate the Fund for the product.



From Billing, select Set up module > Products > New

> **Note:** Note: When multi-entity is enabled and Fundraising Item is checked, the Fund field lookup is populated with Org Codes whose type is Fund. When multi-entity is enabled and Fundraising Item is cleared (not checked) the Entity field lookup is populated with all Org Codes.

Billing accrual dues with Fundraising items

When accrual dues are billed, Fundraising items are marked as such on reports and invoices.

A Pledge activity is created for each separate dues Fundraising product when accrual dues are billed.

Dues payments

On the Dues payment window, Cash receipt window, and Service Central payment windows, iMIS flags payments made on Fundraising items. A "Gift" Activity is generated for each payment applied to a dues product.

> **Note:** Note:
>
> Credit or Debit Memos applied to Dues Fundraising products are flagged as Fundraising and use the same entities as the dues products they apply to.

> **Note:** Whether on a cash or accrual basis, when a company pays dues for an individual, the individual is considered the donor.

> **Note:** Dues Fundraising products count towards Donor Club membership.

Dues Fundraising items in Customer Portfolio Fundraising history

Accrual dues donations are considered Pledges; cash dues donations are considered Gifts. Dues donations are reflected in the Fundraising Summary in the following locations:

- Summary - Dues transactions are grouped by Trans number and donor ID.
- Donor History - A gift or pledge for multiple donations with different target funds, campaigns, or products is shown as "split" in the Fund, Campaign, or Distribution columns.
- Donor History Detail - Appeal and Campaign are listed at the product level. There are adjustments and payments sections for accrual dues transactions. The payments section for dues pledges shows the pledge, and the pledge amount and balance with pledge payments listed on separate lines below the pledge. There is also a payments section for cash dues, but there is no adjustments section.
- Donor Recognition - shows all of the donor clubs the donor has qualified for, including those qualified for with Dues Fundraising products.

  Fields supporting fundraising on the Customer Portfolio Billing tab and on the Subscriptions window

  The Billing tab in the history section of the Customer Portfolio has the FR Item field, to indicate which items are Fundraising items.

  The Dues/Subscription Item Detail window includes Appeal, Campaign, and Fair Market Value read-only fields for Fundraising products and displays a note at the bottom of the screen designating the product as a Fundraising product.

  Source Codes and Appeal Codes for dues payments

  If there is an Appeal Code defined for a Dues Fundraising product, that Appeal Code will be used for all payments for that product. In the absence of a product-specific Appeal Code, if a Source Code is entered during a payment, that Source Code will be used as the Appeal Code for that payment.

  Gift Portfolio

  If a donor has made prior donations through the Gift Portfolio, the giving summary in the Enter and edit gifts window includes Dues Gifts and Pledges and uses the Total Value options chosen in Fundraising > Set up module.

  *Tab on cash dues payments

The *Tab feature can be used to apply open credit invoices to Gifts (Cash Dues).

Billing Payment Importer

The Billing Payment Importer supports Dues Fundraising products by:

- Flagging them as Fundraising items
- Recording the necessary appeal, campaign, and fund
- Creating a GIFT activity for cash dues
- Awarding Donor Club membership

Import Utility

The Import Utility supports Dues Fundraising products by:

- Flagging them as Fundraising items
- Recording the necessary appeal, campaign, and fund
- Creating a GIFT activity for cash dues
- Awarding Donor Club membership
- Associated subscription lines also store the appeal, campaign, and fund of the product

Billing Table Maintenance

Table maintenance uses the Dues product table to define billing line items, establish default pricing, and establish general ledger accounts. The Customer types window is then used to create customer types, specify product line items that apply to each type, and specify pricing.

Setting up customer types

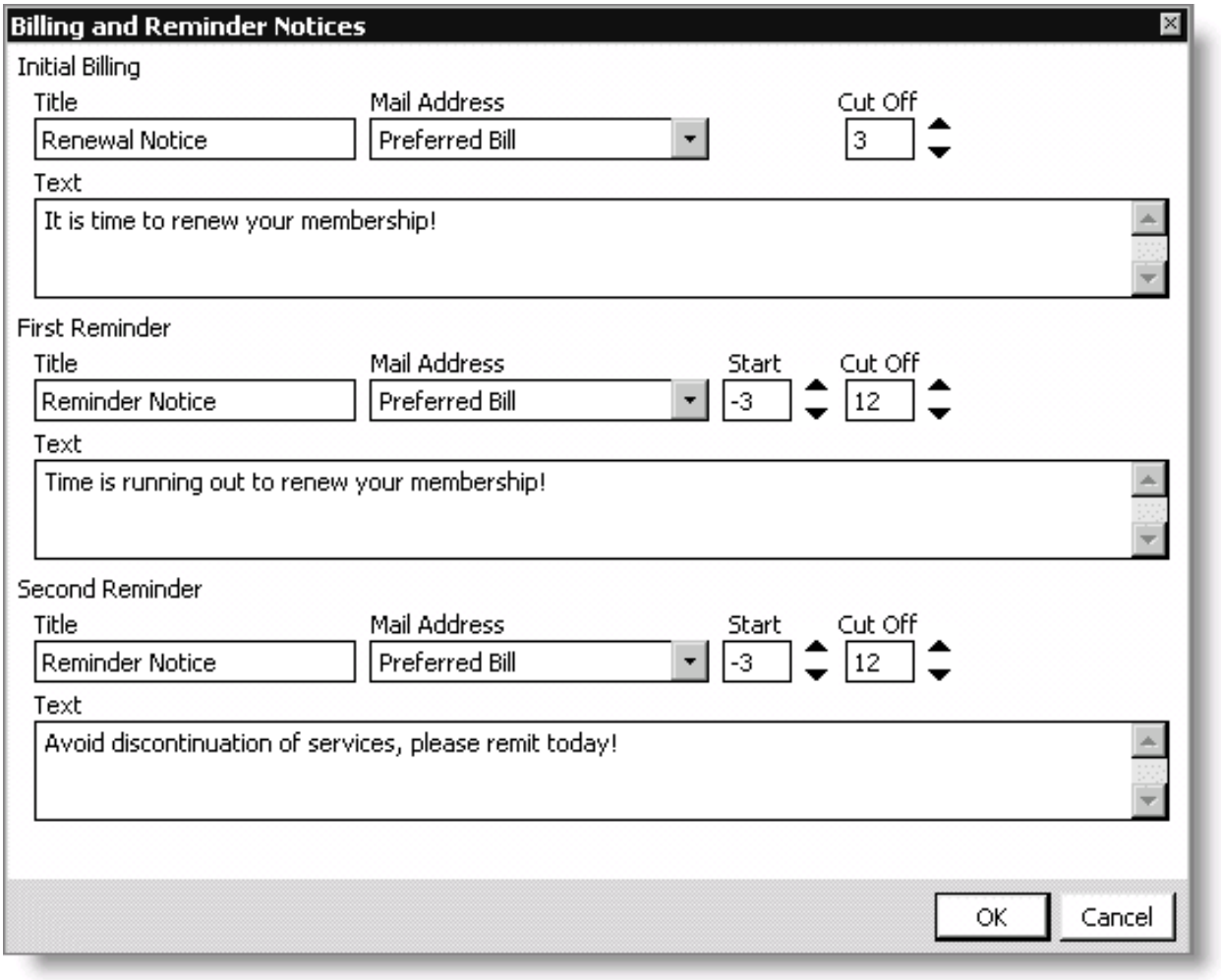
The Customer types window is used to cross-reference mandatory billing product codes with customer types. This information is necessary for generating billing data. See Customer types window.

Setting the billing and reminder notices

The Bills/Reminders button is used to specify when iMIS should send first and second reminder notices to the customers included in the billing run.

Billing and Reminder Notices window

On the Billing and Reminder Notices window, you can enter a title to display at the top of the Billing and Reminder Notice, add overlay text, select a different mail address, and set the default initial and reminder date parameters for each Reminder Notice.



From Billing, select Set up module > Billing cycles, select a Cycle Name, and click Bills/Reminders

Initial Billing, First Reminder, and Second Reminder

Title - Specifies the title to appear on the renewal or reminder notice. For example, Initial Billing, First Reminder, and Second Reminder. You can specify a title for the following renewal notice formats only: Dues Renewal Notice with Reminder Text, Dues Renewal Notice List Bill, and Dues Renewal Notice - No Remittance Stub

Mail Address - Drop-down list for selecting an address option. Options include Preferred Mail, Preferred Bill, or one of the three address purposes defined on the Customer Setup - Address and Notes window (from Customers, select Set up module > General, and click Address and Notes).

Text - Customized text to be added to the billing notice. (Up to 255 alphanumeric characters can be entered.) For most renewal notice formats, the text entered overlays or prints on the preset renewal notice elements. Therefore, add hard returns (press Enter) to shift text down the page far enough to avoid the preset report elements on the form. Full overlay text for all renewal notice formats can be set on the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters).

Examples of notice-specific text:

- Initial Billing - “It is time to renew your membership!”
- First Reminder - “Time is running out to renew your membership!”
- Second Reminder - “Avoid a discontinuation of services, please remit today!”

Note: This feature is available on the following renewal notice formats only: Dues Renewal Notice with Reminder Text, Dues Renewal Notice List Bill, Dues Renewal Notice - No Remittance Stub, Std. Form ASI-018 DBL Column List Bill, Std. Form ASI-019 Dbl Column List Bill, Std. Form ASI-020-Full Page List Bill, and Std. Form ASI-021-Full Page List Bill.

Initial Billing - Cut Off

Use this option to set the default number of months for calculating the billing Effective Date for anniversary billing cycles. For example, if you typically send out your initial billing three months before the renewal or Paid Thru date expires, set the first Cut Off field to 3

on the Initial Billing. If your current run date is 7/25/2001, iMIS will set the default Effective Date to 10/01/2001 for the initial billing, and will bill all customers whose Paid Thru date expires before that date and who have not been billed previously.

On an annual cycle, the Effective Date should always coincide with the first day of the fixed term. iMIS will calculate the Effective Date based upon the First Month of Fiscal Year set on the AR Cash
Set up module window (from AR/Cash, select Set up module). The default always assumes the billing applies to the current fiscal or fixed year. Override the year when you run next year's renewal cycle in advance.

> **Note:** Note: The default Effective Date can be overridden as needed at dues product billing time. If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

First & Second Reminder Start and Cut Off

Use this option to set the Start and Cut Off parameters used to calculate a date range for selecting outstanding billings. The date range, which should include the outstanding bill's original date or Run Date, is determined by subtracting the number of months set in the Start and Cut Off month field from the run date.

For example, if first reminders are typically sent one month after the Initial Billing, specify -2 for the Start field and -1 for the corresponding Cut Off field. In the following example, the current run date is 7/25/2001. iMIS will set a default begin and end date range and print First Reminder renewal notices for those customers whose initial billing was run between 5/01/2001 and 6/01/2001 inclusive and who are currently not paid.

If you want to remind your customers more than twice, set up an additional billing cycle for printing Reminder Notices 3, 4, and so forth to make processing your additional Reminder Notices easier. When you use the Third, Fourth, and Fifth Reminder Notices from a second billing cycle, iMIS will automatically calculate the reminder start and end dates based on the Start Month set up on the Billing and Reminder Notices window. After

the initial bill is printed, the Subscriptions.REMINDER_COUNT field changes from 0 to 1. After the first Reminder Notices is printed, it changes to 2 and will stay at 2 even after you run a 3rd, 4th, or 5th Reminder Notice.

To set the billing and Reminder Notices

1. From Billing, select Set up module > Billing cycles. The Set up billing cycles window opens.
2. Select a Cycle Name.
3. Click Edit.
4. Click Bills/Reminders to open the Billing and Reminder Notices window.
5. Enter the Title information.
6. Select the Mail Address.
7. Enter the customized Text to be added to the billing notice.
8. Select the Initial Billing Cut Off month.
9. Select the First and Second Reminder Start and Cut Off months.
10. Click Save.

Defining special pricing

Pricing can be defined at the dues product level|topic=Defining product codes or, if it is a mandatory dues product, at the customer type|topic=Setting up customer types level.

> **Note:** Caution! To determine a price for a given product, iMIS looks on the Special Pricing window. If no price is set on the Special Pricing window, iMIS checks the Set up customer types window. If no price is set or if the Comp option is not enabled, iMIS looks on the Set up products window.

Use special pricing dues calculations for the following:

- To base billing on customer types that are subdivided into billing categories
- To calculate billing based on data in your demographic fields
- To enter product rates individually because there is no pattern to the rates

Sometimes, pricing for products cannot be represented by simple flat rates at either the default standard customer/non-customer pricing level or by flat rates at the customer type level. If flat rates do not apply at either of these two levels, use the Special Pricing window to define pricing rules.

Special pricing situations may include the following:

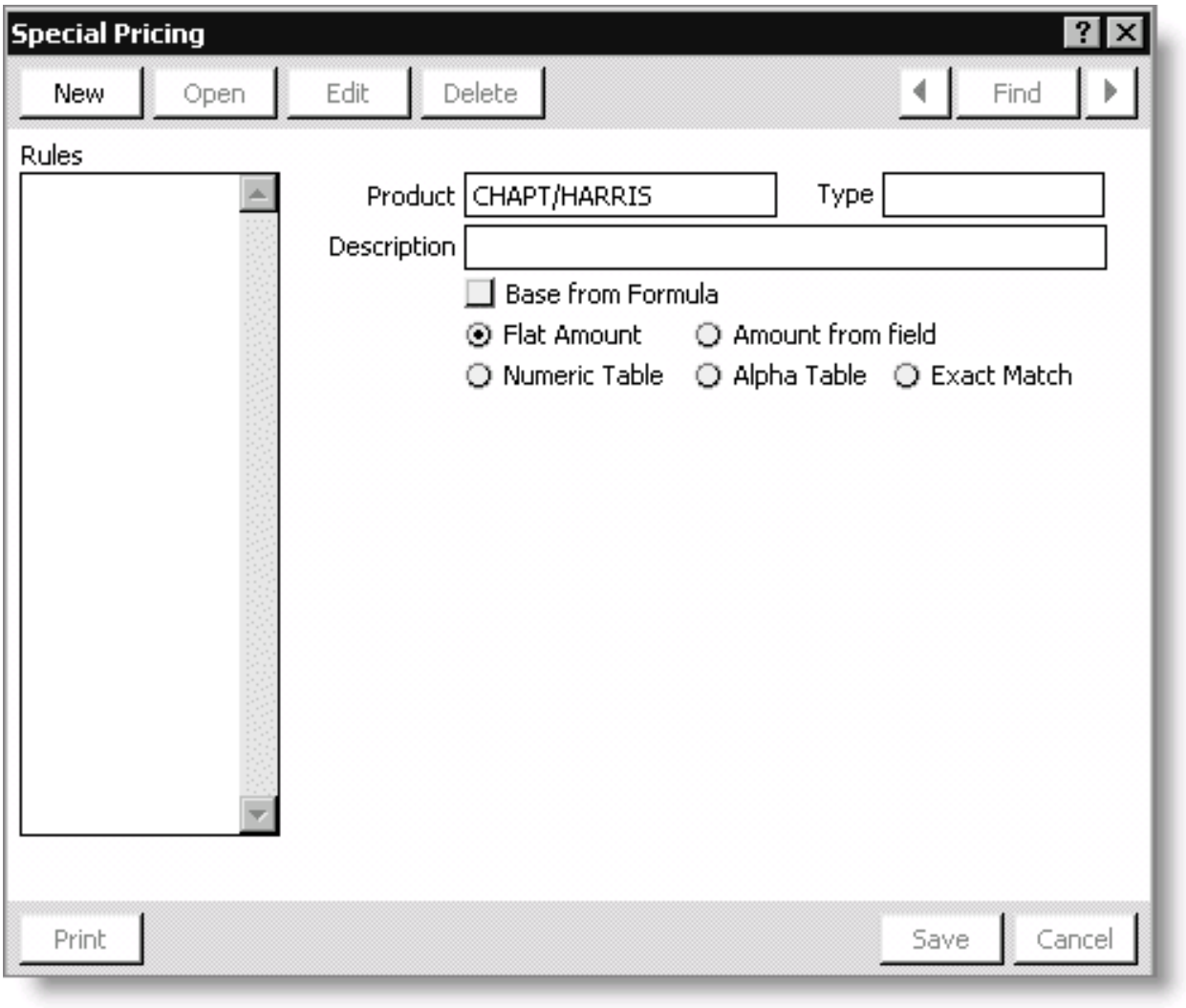
- Calculation of sliding scale rates
- Calculation using minimums and maximums
- Calculations of categories
- Calculations of customized data
- Calculations using yes and no
- Calculations of certification length

Special pricing rules for dues products:

- Keep it simple
- Use SQL syntax
- Use the Name_All view (not table names).

Note: The Name_All view is a combination of multiple Name-related tables. The Name_All view is required for all special pricing other than flat rates. Use Name_All as a prefix for all iMIS source fields instead of the actual file name. See Creating the Name_All View.

Special Pricing window for Billing



From Billing, select Set up module > Products, make a selection from the list of Current Products, and click Special Prices

Rules

A list of defined special pricing rules.

Product

Displays the product type that was selected on the Set up products window.

Type

Specifies the customer type or the customer type/optional category combination (customer type and category codes are separated by a forward (/) slash.)

To define special prices for a predefined category, open the Set up general look-up/validation window to check for the correct category. To create a new category, see Setting Up Customer Type Categories for Special Pricing.

Description

Enter a detailed description of the billing rule for the specified customer type. This field is for reference only and is not displayed on any bill or report.

Base from Formula

Enable when a formula is to be added to the base amount. This option is available only when the Numeric Table, Alpha Table, or Exact Match option is enabled.

Flat Amount

Use this setting for assigning customer type fees that vary by billing category or rates for non-customer type products whose fees vary by customer type. If you select this option, enter a Base Amount value.

Amount from field

Use this setting to reference an exact rate or to enter a formula that calculates a rate based upon a field. If you select this option, enter
a user-defined field in the Source Field. For example, Name_All.ACTIVITY_FEE, or an SQL calculation that references such fields.

Numeric Table

Use this setting to vary rates according to numeric values. You can establish sliding rates based on income/volume, or rates based on length of certification. This option supports a maximum of 20 rows and prompts you to enter numeric values (units/code) and rates (base amount) that serve as starting levels for applying pricing guidelines. An optional additional per-unit charge can be entered in the Amt/Add'l Unit field.

Alpha Table

This field prompts you to complete a table of alphanumeric values. Like the Numeric Table option, this option looks for a range rather than an exact match. Use this setting to create sliding rates based on values matched to alphanumeric or character fields.

Exact Match

Use this field to restrict a character field to an exact match. Enter a setting to create exact rates based on values exactly matched to character fields.

Source Field

Specifies a user-defined field that references the value entered in the Amount from field field. This option is available only when the Amount from field, Numeric Table, Alpha Table, or Exact Match option is enabled.

Units/Code

Specifies the numeric values that serve as starting levels for applying pricing guidelines. This option is available only when the Numeric Table, Alpha Table, or Exact Match option is enabled.

Base Amount

Specifies a rate that serve as a starting level for applying pricing guidelines. This option is available only when the Flat Amount, Numeric Table, Alpha Table, or Exact Match option is enabled.

Amt/Add'l Unit

Specifies an optional additional per-unit charge. This option is available only when the Numeric Table option is enabled.

Setting up customer type categories for special pricing

Customer type|topic=Setting up customer types categories are used with special pricing|topic=Defining special pricing. For example, create a billing category of 1 for customers living in Texas and a billing category of 2 for customers living in California. Then go to special pricing and set up special rates for customers who have a customer type of M, a billing category of 1, and who live in Dallas.

To define special pricing

1. From Billing, select Set up module > Products to open the Set up products window.
2. Select a value from the Current Products list to which special pricing will apply (for example, DUES-BASIC).
3. Click Special Prices to open the Special Pricing window. The product code selected from the Set up products window automatically displays in the Product field on the Special Pricing window.
4. Click New. The Base Amount field displays.

   Note: To modify an existing rule, select the rule and click Edit.
5. Define a special pricing rule by entering the Type, Description, and Base Amount. Other options may also be selected such as Flat Amount, Exact Match, and so forth. For more information on defining the options, see Special Pricing Examples.

   Note: Some pricing rules require a basic understanding of SQL and user-defined fields. See a SQL manual for information about entering SQL commands. Also, see Creating the Name_All View.
6. Click Save.

To create a new billing category

1. From Customers, select Set up module > General to open the Set up general options window.
2. Click Basic Options to open the Customers Setup - Basic Options window.
3. Click Edit.
4. Enable the Use Bill Categories option.
5. Click Save.
6. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.

7. Select CATEGORY from the tables drop-down list.
8. Click New.
9. Enter the billing Code. The CODE field must be 5 characters or less; otherwise, it will not display in the Category drop-down list under Customers.
10. Enter a Description that will help identify the billing code.
11. Click Save.

Creating the Name_All view

The Name_All view is a pseudo table, or concatenation, of multiple Name-related tables. It contains fields from all joined files, as well as all related rows from all joined files. An ID that does not have a row in all joined tables will not appear in the view.

The Name_All view automatically includes data from the Name and Name_Fin tables. It is required for all special pricing and should be used as a prefix for all iMIS source fields instead of the actual file name. (See Defining Special Pricing.) Any custom demographic table can be selected for inclusion in the view.

To create a Name_All view

1. Determine the fields necessary for special pricing. If some of your special pricing fields come from a user-defined custom table:

1. From Customers, select Set up module > General to open the Set up general options window.
2. Click Additional Windows to open the Customer Setup - Additional Windows window.
3. Click Define Tables to open the User Defined Tables window.
4. Enable the Always Create and Use for Dues Pricing options for each table that includes a special pricing field. When these options are enabled, the Name_All view is automatically created after you click Save.
5. Click Save.

Note: You must be logged in as the database owner to perform this operation.

2. Make sure a record exists for all IDs that will be billed at a special price.

   Note: If customer records were converted, or the Always Create option was activated before operations were live, you may need to generate the required missing user-defined records before you create the Name_All view. You can use a simple SQL script to do this.

1. To enter the SQL script, select Utilities> SQL Query. The SQL Query window opens.
2. Click New.
3. Enter the script in the SQL Command Text area.
   insert into Name_Demo(ID)
   select ID from Name where not exists
   (select Name_Demo.ID from Name_Demo where Name_Demo.ID = Name.ID)
4. Click Execute.

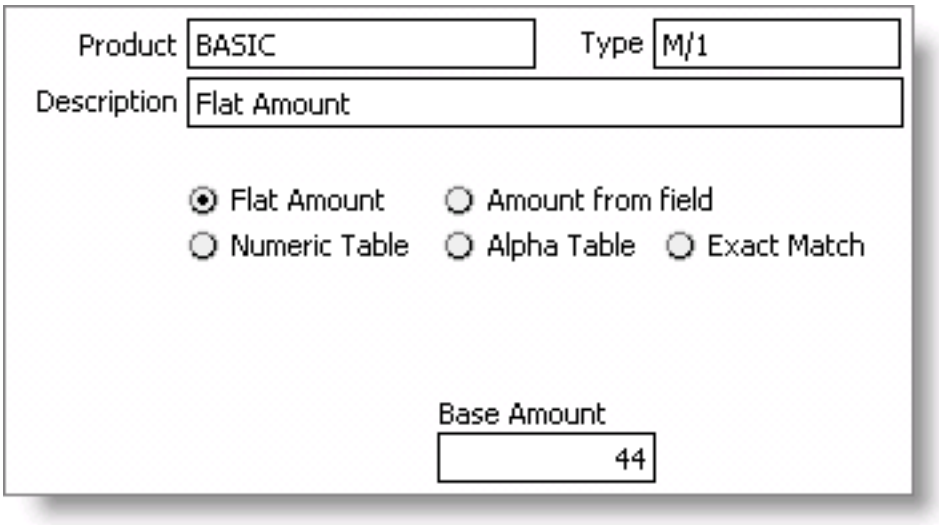
   Note: You can add additional conditions such as customer type qualifications. Keep in mind that if you use a user-defined table in the Name_All view, the user-defined table must exist for every customer that is of a customer type being referenced in a special pricing formula.

Special pricing examples

The Special Pricing window gives you the flexibility to set the pricing for products in many different ways. This section provides specific examples of special pricing.

Flat amount price

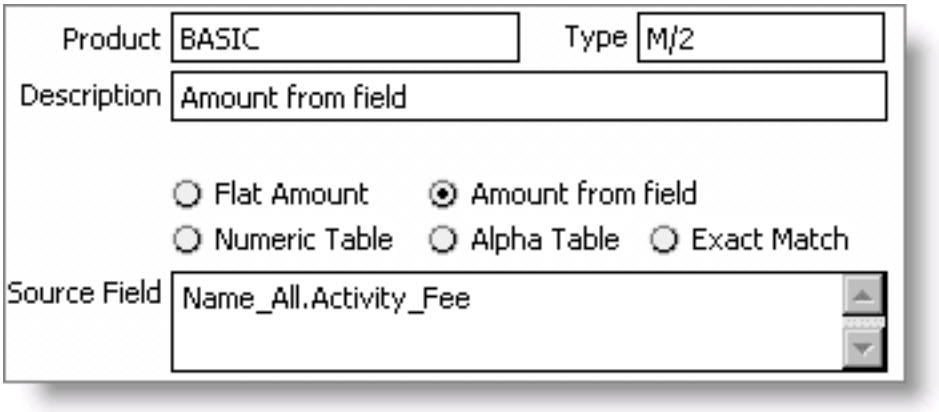
In this example, a flat rate is billed to customers who have a Customer type of M and a billing category of 1.



Special Pricing window with Flat Amount selected

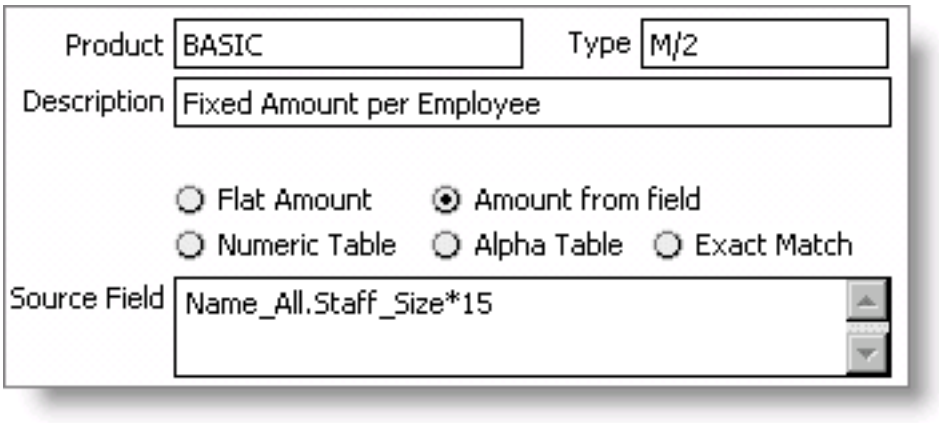
Pricing based on an iMIS field

In this example, rates are billed to customers who have a customer type of M and a billing category of 2. The amount billed is determined by the rate that was manually entered for each customer in the user-defined Activity_Fee field.



Special Pricing window with Amount from field selected

This example shows a simple calculation to determine the amount billed. In this case, the amount billed is $15 times the customer's staff size. The staff size is stored in the user-defined Staff_Size field.



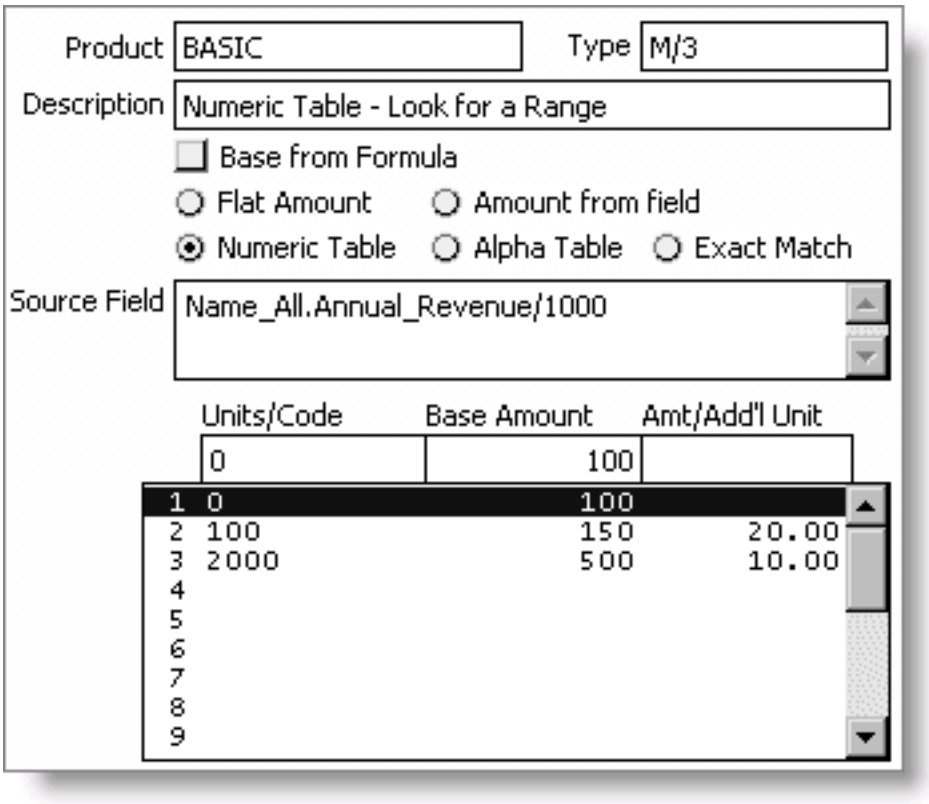
Special Pricing window with Amount from field selected

Note: Note: If you attempt to bill and you receive a SQL error stating you have an invalid column prefix, you have not used the required Name_All prefix in your special pricing formula. Even when you are referencing a field within the Name table, you must set up and cross-reference the Name_All view for all special pricing methods except flat rates.

Pricing based on a numeric table

Example 1

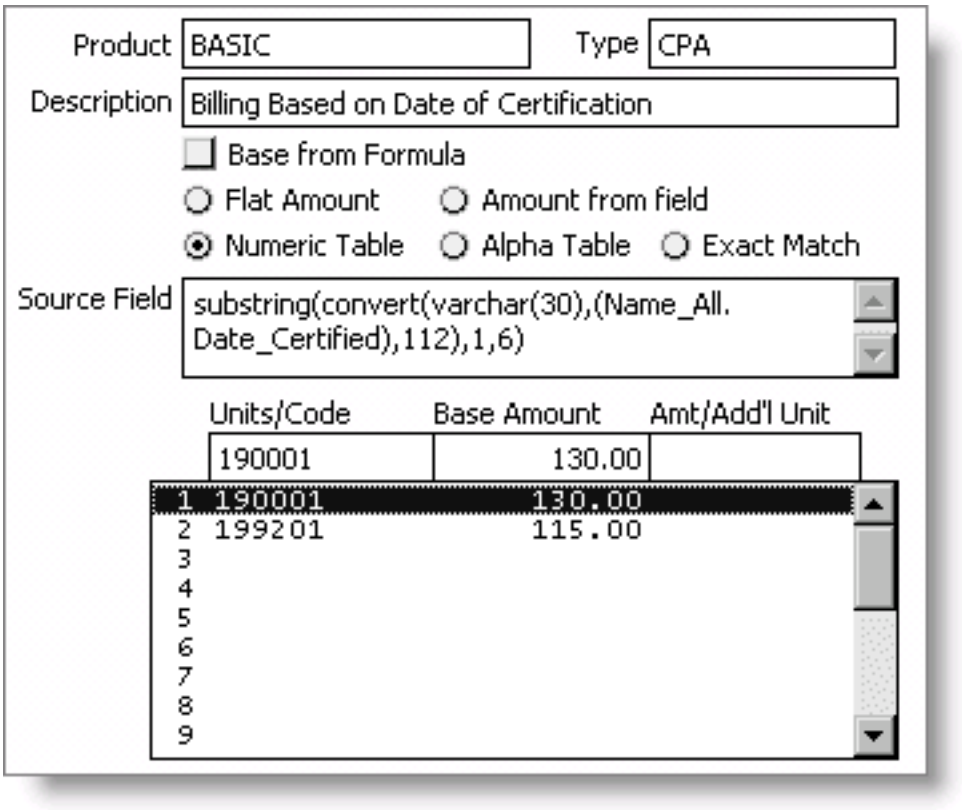
In this example, rates are assigned according to the customer's annual revenue divided by 1,000. If the net result falls between 0-99, the customer is charged $100. If the net result falls between 100-1999, the customer is charged $150 plus $20 for each over the initial value of 100. The revenue information is stored in the user-defined field Annual_Rev.



Special Pricing window with Numeric Table selected

Example 2

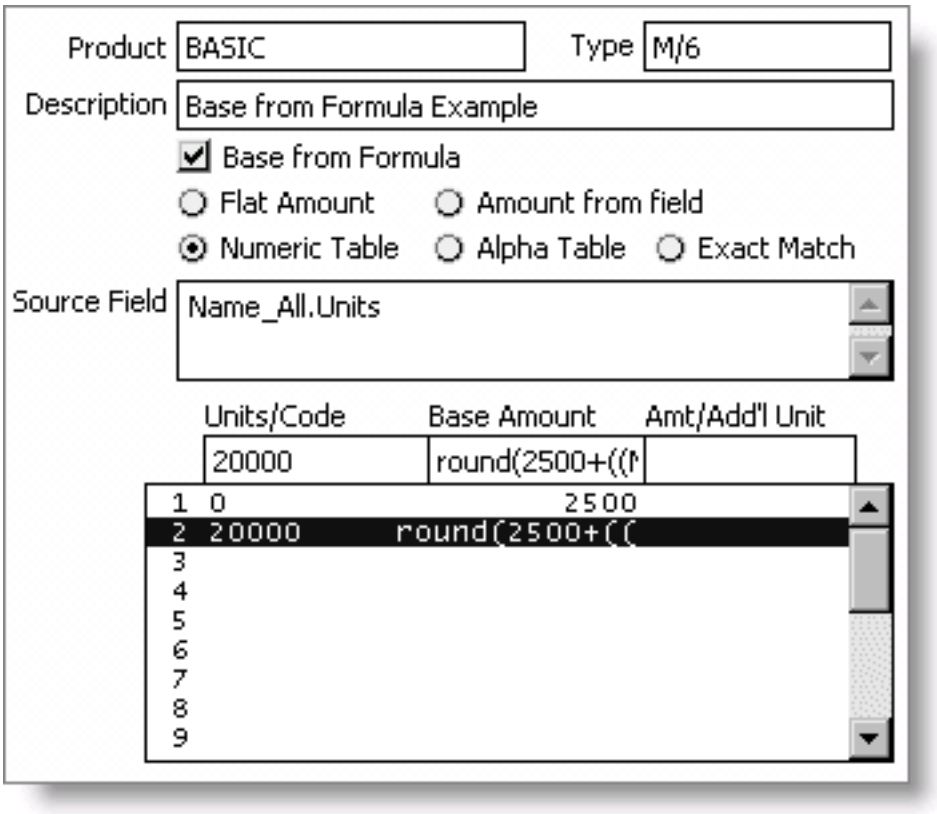
In this example, CPAs certified before 1992 are billed $130. Those certified after 1992 are billed at $115. The certification date is stored in the user-defined Date_Certified field.



Special Pricing window with Numeric Table selected

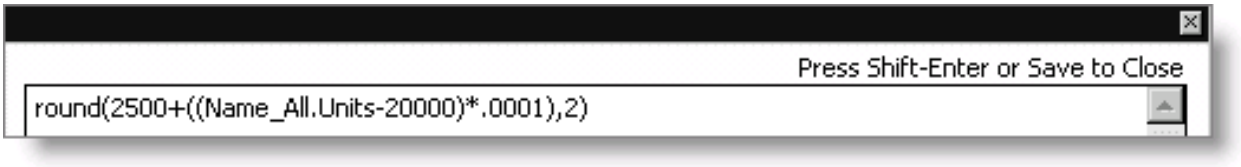
Example 3

In this example, rates are assigned according to the formula that was added to the base amount. According to this formula, a customer will be billed a flat amount of $2,500 until 20,000 units have been billed. After 20,000 units, an additional charge of .0001/unit is billed. The number 2 shown at the end of the formula indicates the amount billed should be rounded to two decimal places.



Special Pricing window with Numeric Table selected

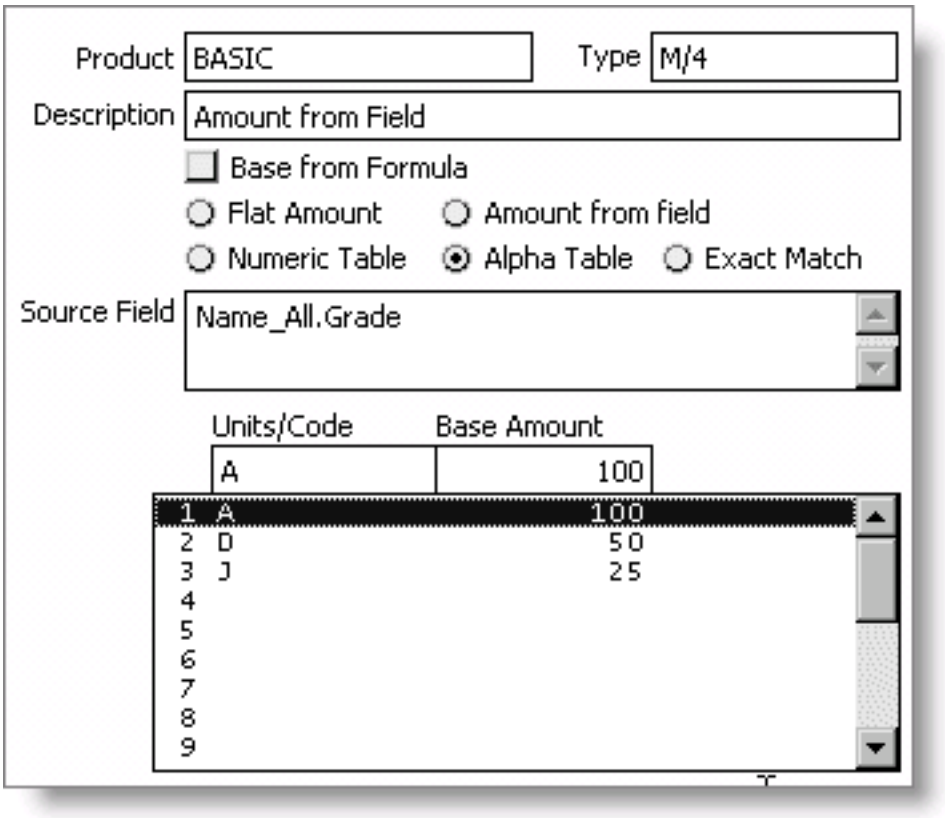
Note: Note: To view the entire formula, press Crtl+Z to expand the formula area.



Expanded Base Amount field showing formula

To define pricing based on an alpha table

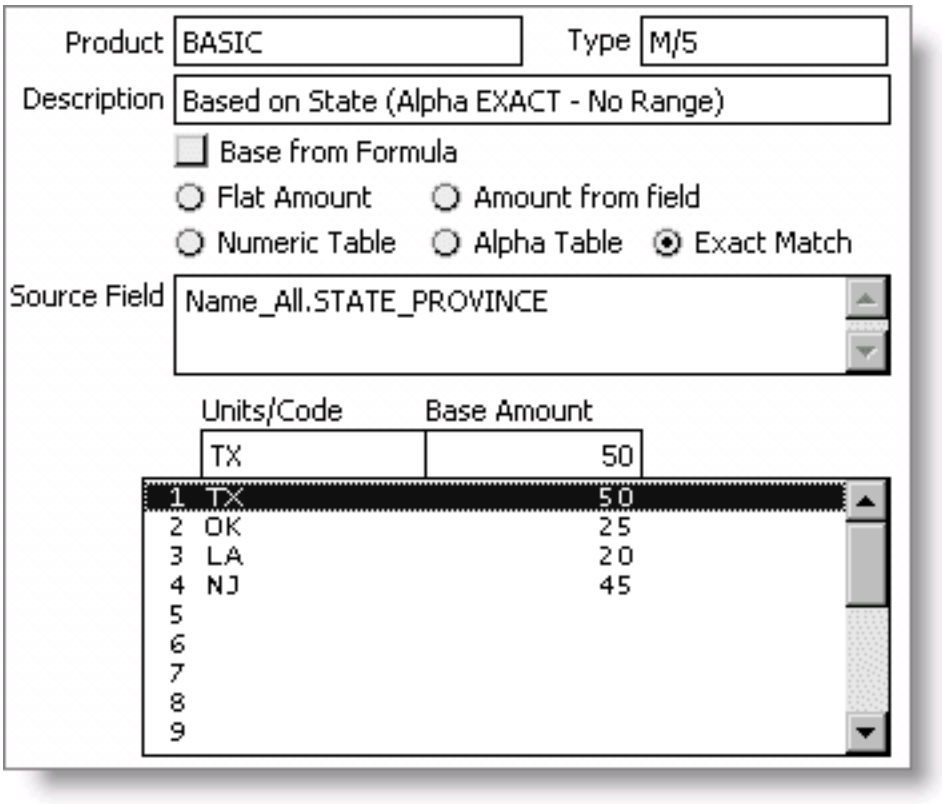
In this example, rates are assigned according to the customer's grade. The grade information is stored in the user-defined Grade field. If the customer's grade is A-C, the billing rate is $100. If the grade is D-I, the billing rate is $50. For grades equal to or greater than J, the billing rate is $25.



Special Pricing window with Alpha Table selected

Define matching based on exact match

In this example, rates are assigned according to the customer's state. The state information is stored in the Name field STATE_PROVINCE. To enter all the state information in the space available (20 lines), it may be more efficient to split the states into categories such as NW, SW, and so forth.



Special Pricing window with Exact Match selected

Additional special pricing examples

In many cases, there may be alternative methods for implementing a special pricing scenario. For example, most table/step special pricing methods could be defined through one or more SQL statements. SQL statements are less limiting (not restricted to 20 table levels) and may make the dues billing run more efficiently.

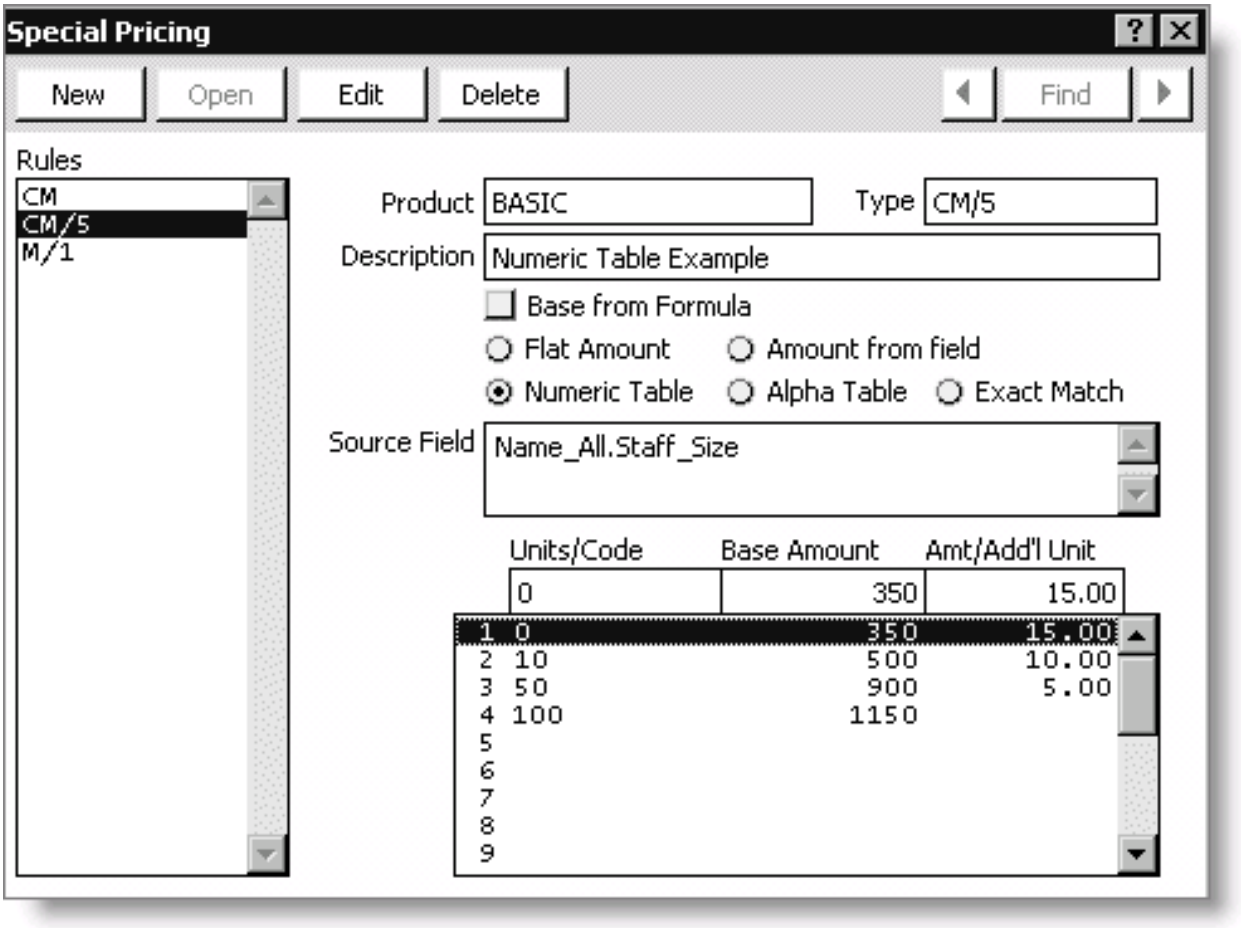
To demonstrate the alternative methods of special pricing implementation, the following examples show the alternative table compared to SQL statements for a simple sliding-scale type billing structure.

Special pricing scenario 1

- Set up dues pricing according to the staff size of an organization.
  For staff sizes from 0-9, the base dues are $350 plus $15 per employee.
- For staff sizes of 10-49, the base rate increases to $500 plus $10 per employee.

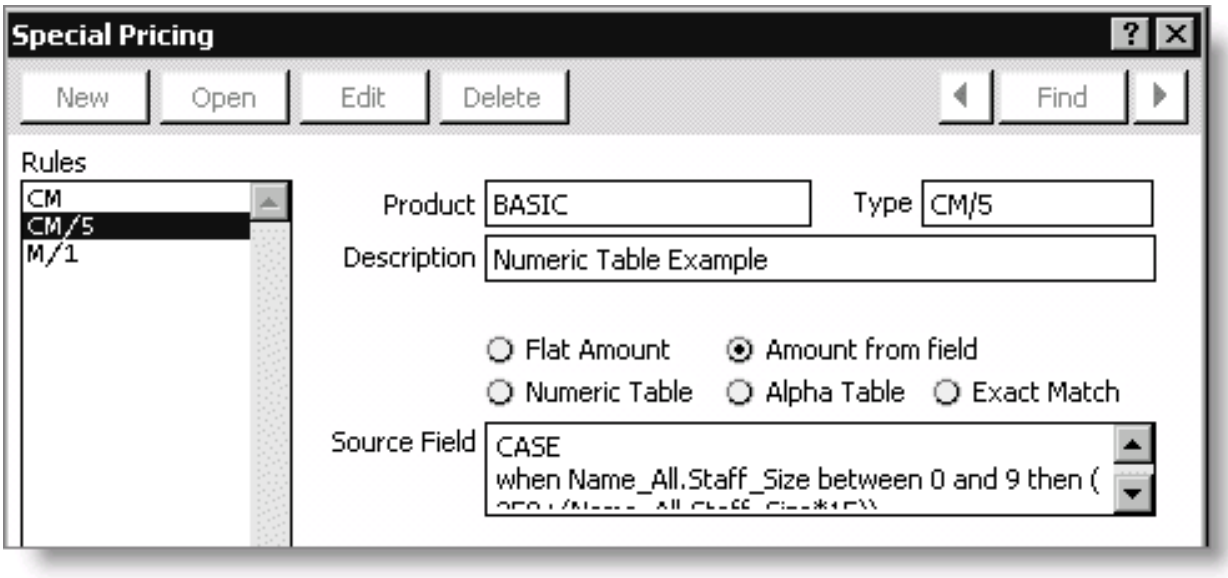
- For staff sizes of 50-99, the base dues are $900 plus $5 per employee.
- The maximum dues charged for an employee count of 100 or more is $1,150.

  For example, an organization with two staff members would be charged $380 [$350 base rate + (2x$15)]. A company with 15 employees would be charged $550 [$500 + (5x$10)].



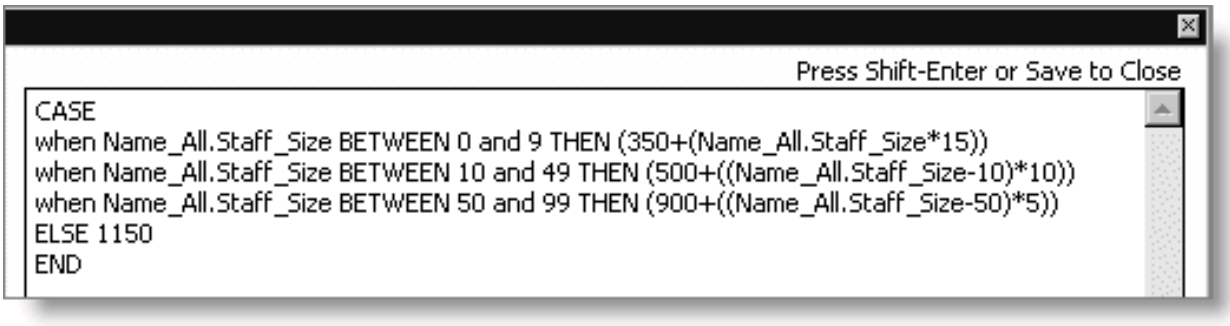
Special Pricing window - Numeric Table example

If your system supports the CASE statement (for example, iMIS for Microsoft SQL running under Microsoft SQL Server version 7 or later), you can implement special pricing with an SQL CASE statement by selecting the Amount from field option.



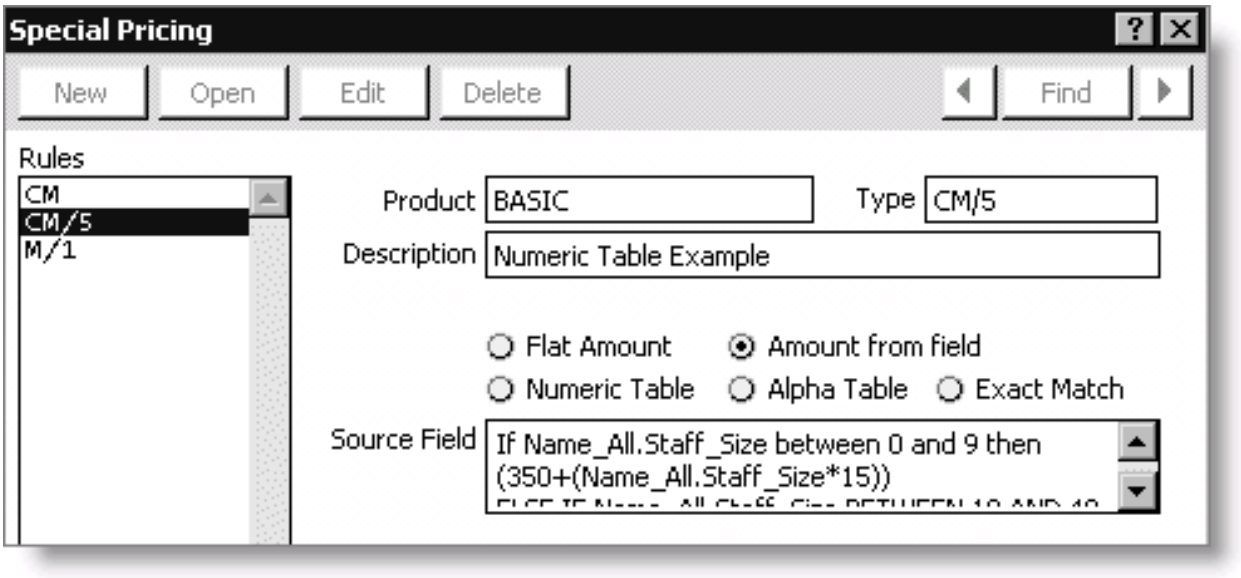
Special Pricing window- SQL CASE Statement example

Note: Note: Press Ctrl+Z to view the entire source field.

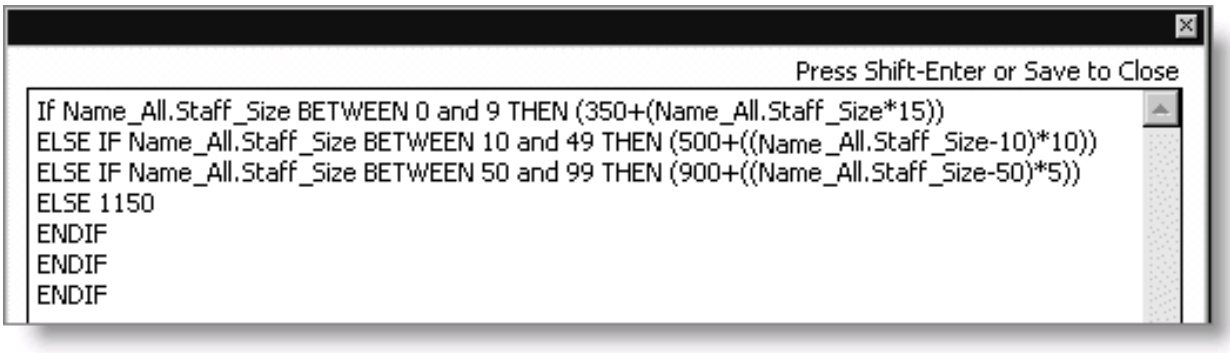


Expanded Source Field showing SQL CASE Statement

If your system supports IF statement logic, you can implement the special pricing with an IF statement by selecting the Amount from field option and entering the IF statement in the Source Field that displays.



Special Pricing window - SQL IF statement example

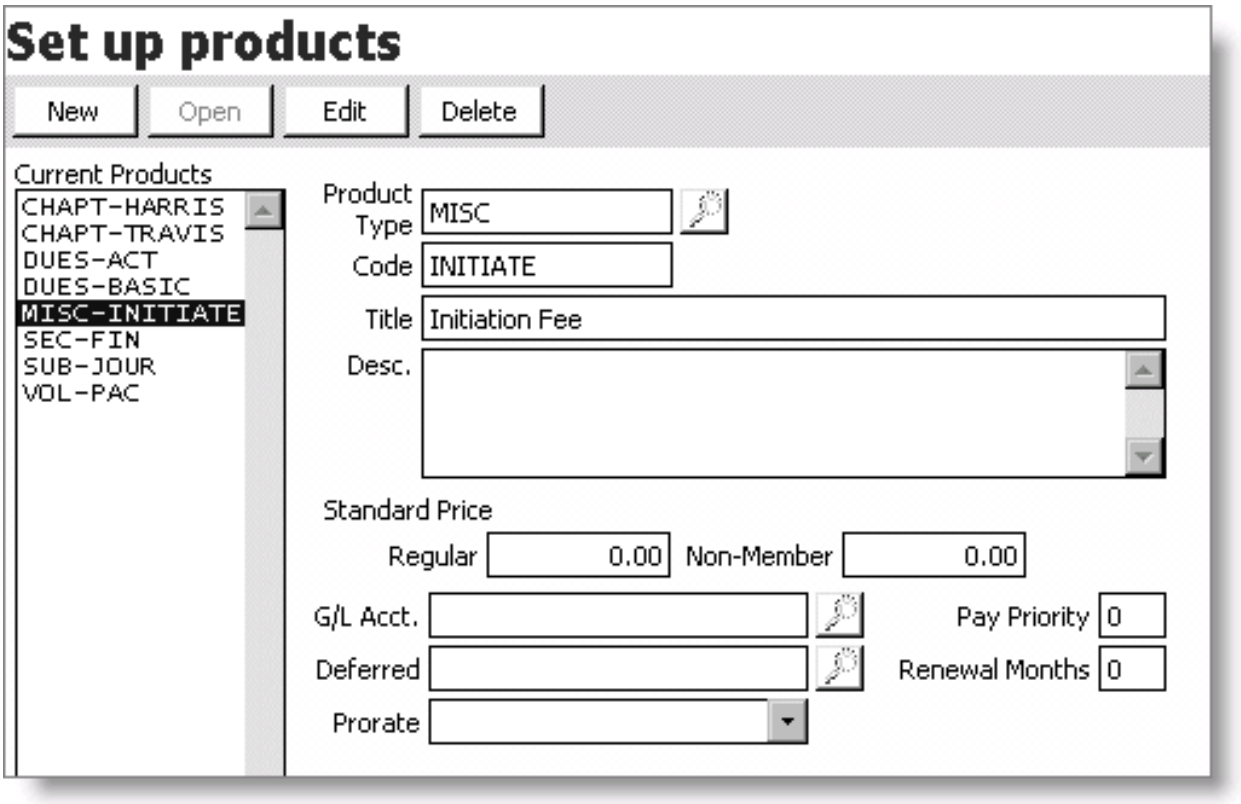


Expanded Source Field showing SQL IF Statement

Special pricing scenario 2

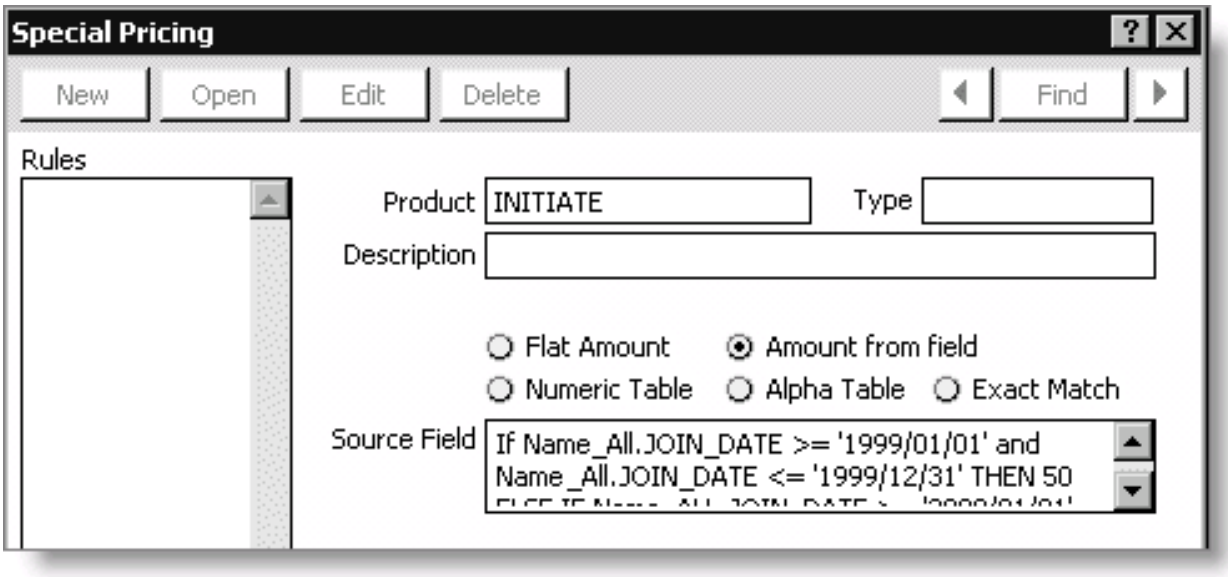
Set up an initiation for all new customers. In this example, special pricing is based on the JOIN_DATE in order to bill the customer only once. In 1999, the initiation fee would be $50. In 2000, the fee would have increased to $55, and then increased again in 2001 to $57.50.

The first step is to set up a MISC product code.



From Billing, select Set up module > Products

On the Special Pricing window, the Amount from field option is selected.



The following formula is entered in Source Field.

Note: Note: The dates will need to be adjusted for the years to which the initiation fees will be applied. The date format is yyyy/mm/dd.

If Name_All.JOIN_DATE >= '1999/01/01' and Name_All.JOIN_DATE <= '1999/12/31' THEN 50

ELSE IF Name_All.JOIN_DATE >= '2000/01/01' and Name_All.JOIN_DATE <= '2000/12/31' THEN 55

ELSE IF Name_All.JOIN_DATE >= '2001/01/01' and Name_All.JOIN_DATE <= '2001/12/31' THEN 57.50

ENDIF

ENDIF

ENDIF

Note: Note: The MISC-INITIATE product code should also be added to the Set up customer types window (from Customers, select Set up module > Customer types) for the BASIC dues product.

Defining prorating rules

MC: Note contributed from consultant Nola Schembri, 5/16/2007.

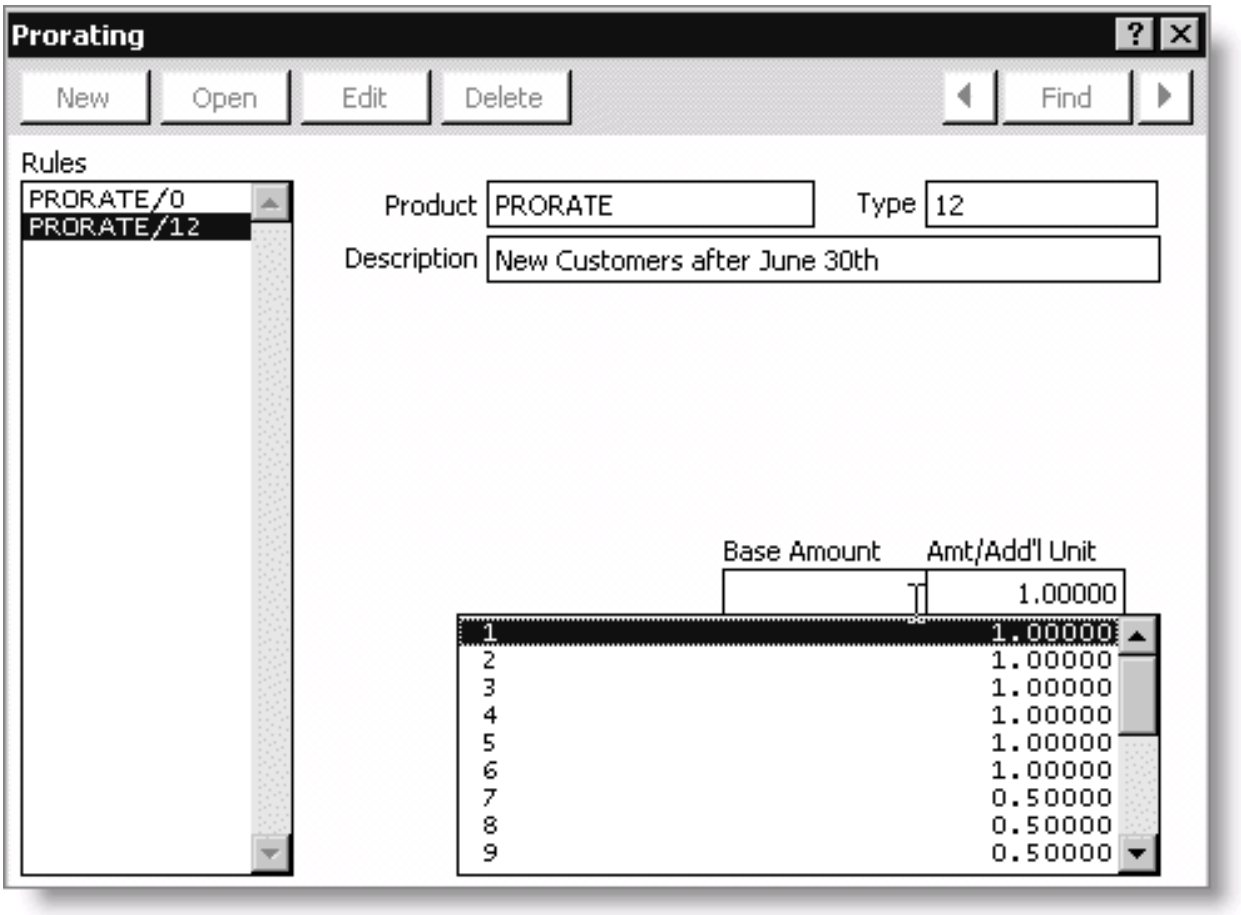
Prorating means allocating or assigning an amount to an activity or product that is proportional to some base (determined by a formula or procedure). Prorating is only applied to organizations that bill on an annual or fixed-term basis, as opposed to an anniversary or rotating term basis.

Note: Note: The number of months used by the prorate rule for an individual is Thru Date to Join Date. Prorate only applies if the Join Date is populated before running the billing. See Begin Date for an annual billing cycle.

The three options available to define prorating rules include the following:

- Do Not Prorate – Same dues regardless of when customer joins.
- Standard Prorating – Prorating for the current year (depends on the billing interval). For example, if a customer joins in month 7 and annual dues are $200, the calculated dues would be 6/12 of the total dues, or $100.
- Special Prorating – User-defined prorating rules, depending upon the needs of the organization. If the Special Prorating option is enabled, proration rules are created on the Prorating window. Prorating rules can be used for unique situations that require more than simple monthly prorating within the first year, such as:
- Quarterly or semi-annual prorating
- Second-year prorating (receive x% off of next year's dues)
- Advancing the membership term to the end of the next year
- Multiple prorating rules

Prorating window



From Billing, select Set up module > Products, and click Prorate Rules

Rules

List of defined prorating rules.

Product

This field is automatically populated with PRORATE. You can edit this value.

Type

Indicates the number of months in the billing period. This number must agree with either the Product Renewal Months, on the Set up products window (see "Set up products window for Billing") or the Standard Billing Interval on the Billing Set up general options window (see "Set up general options window for Billing").

Description

Specifies a detailed description of the prorating rule.

Prorating Table Entries

The entries in the prorating table specify the amount that a customer is charged. For example, if month 1 represents an on time payment, for which a customer is charged a full fee (100%), the Amt/Add'l Unit field will hold a "1". There must be one table entry for each month in the renewal cycle as defined in the Type field.

Base Amount

Specifies refinements (if any) to the prorating rule. The following codes can be entered in this field:

- F (Future Credit) - Postpones the prorating discount to the second billing year.
- B (Bump Date) - Advances the end of the billing term to the end of the next term. The amount charged depends on the multiplier entered in the Amt/Add'll Unit field.

Amt/Add'l Unit

Indicates the percentage of the full price to charge customers.

Future credit and bump date prorating

In addition to changing the price a customer is charged in monthly increments, special prorating rules also offer Future Credit and Bump Date prorating.

Future credit

Future credit prorating applies any time-based discounts to next year's dues and charges full credit for this year's dues. For example, an organization may charge full annual dues no matter when in the year a customer joins, but give a time-based discount for new members joining after the sixth membership month.

Bump date

Bump date prorating charges a full annual fee no matter when in the membership year a customer joins, but after a named cutoff point, advances the paid thru date to the end of the next billing term.

Future credit and bump date examples

	1.0	The customer is charged the full annual rate.
	0.5	The customer is charged 50% of the annual rate.
F	0.5	The customer is charged the full annual rate but will receive a 50% discount on next year's rate.
B	1	The customer is charged the full annual rate, but the paid through date will be set to the end of next year's term, not this year's term.
B	1.5	The customer is charged 1.5 times the annual rate and the paid through date will be set to the end of next year's term, not this year's term.

Note: Note: If you bill once per year, but want to decrease the amount charged a new customer on a quarterly basis, define a 12-month prorating rule and then use identical line entries for each month in a quarter. For example, the line entries for months 1, 2, and 3 would be identical.

To define special prorating

1. From Billing, select Set up module > General options to open the Set up general options window.
2. Click Edit.
3. Select the Annual option under Billing Time.
4. Select the Special Prorating option under Prorating.
5. Click Save.

6. Select Billing > Set up module > Products.
7. Click Prorate Rules to open the Prorating window.
8. Click New.
9. (optional) In the Product field, rename the rule.
10. In the Type field, enter the number of months in the billing period.
11. In the Description field, enter a description of the prorating rule.
12. (optional) Enter the Base Amount to reflect second-year prorating or an extension of the term to the next year or fixed term.
13. Enter a multiplier in the Amt/Add'l Unit field. For example, 50 percent should be entered as .50.

    Note: The number of lines in the table must equal the number of months specified by the rule type.
14. Click Save.

    To define future credit prorate pricing

    The following example shows a normal prorating setup in which the reduction in the rate is postponed until the second term. If a customer joins during months 4-6, the customer will be billed the full amount the first year and 75% the second year.

1. From Billing, select Set up module > Products to open the Set up products window.
2. Click Prorate Rules to open the Prorating window.
3. Click New.
4. In the Type field, enter 12 as the number of months in the billing period.
5. In the Description field, enter New Customers as the description.
6. Enter a multiplier of 1.0 for months 1-3 in the Amt/Add'l Unit field.

7. Enter F in the Base Amount field and a multiplier of .75 for months 4-6 in the Amt/Add'l Unit field.
8. Enter F in the Base Amount field and a multiplier of .50 for months 7-9 in the Amt/Add'l Unit field.
9. Enter F in the Base Amount field and a multiplier of .25 in the Amt/Add'l Unit field for months 10-12.
10. Click Save.

To advance the billing term with Bump Date prorating

In the following example, no prorating occurs until month 7 when a new customer is charged half of the rate. Customers joining in months 11 or 12 pay the full amount and will receive services for a longer term (13- and 14-months respectively).

1. From Billing, select Set up module > Products to open the Set up products window.
2. Click Prorate Rules. The Prorating window opens.
3. Click New.
4. In the Type field, enter 12 as the number of months in the billing period.
5. In the Description field, enter New Customers after June 30th as the description.
6. Enter a multiplier of 1.0 for months 1-6 in the Amt/Add'l Unit field.
7. Enter a multiplier of 0.5 for months 7-10 in the Amt/Add'l Unit field.
8. Enter B in the Base Amount field and a multiplier of 1.0 in the Amt/Add'l Unit field for months 11-12.
9. Click Save.

Setting up list billing

List billing enables you to generate a single renewal notice to a Bill To third party (such as a company) that is responsible for paying the fees for multiple customers. The multiple

customers and their respective line items would all be listed on the single renewal notice mailed to the Bill To ID.

To generate list bills with iMIS, set up a list billing cycle and establish the Bill To ID.

Depending on the nature of the list billing, Bill To ID criteria can be established at one of four possible levels:

- Set up all line items to be billed to the parent company on the Set up customer types window
- Set up all line items of an individual customer to be billed to a specified third party Bill To ID on the Financial tab
- Set up the Bill To ID for specific line items selected on the Dues/Subscription Item Detail window
- Set up the Bill To ID for specific line items on the Bill to Information window

There is no preferred method for list billing. You should determine your specifications on preferred business practices for your organization.

> **Note:** Note: You can process list payments using the Enter and edit payments window in Service Central.

To set Bill To using the Set up customer types window

This is the most automated method. When a company should be billed for the customer dues products of all individuals or branch customers of a particular customer type, select the Bill Company checkbox on the Set up customer types window.

1. From Customers, select Set up module > Customer types to open the Set up customer types window.
2. Create a customer type and select Bill Company. (See Customer types window).
3. Click Save.

To set Bill To using the Financial tab

When all line items for a customer will be billed to a Bill To ID, set the Bill To ID on the individual's Financial tab.

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Financial tab.
4. In the Bill To ID field, enter the ID of the company or individual to be billed for this individual's billings or select the lookup icon on the Bill To ID field to select a value.
5. Click Save.

To set Bill To using the Dues/Subscriptions Item Detail window

If only certain line items for an individual will be billed to a third party (which may not be the same as the linked company ID), identify the third party on the individual's Dues/Subscription Item Detail window. For example, a customer may have bought a journal or subscription through an agency rather than through the customer's company.

1. From Customers, select Manage customers to open the Manage customers window.
2. Find a customer's record.
3. Select the Billing tab.
4. Select the line item that will be billed to a third party.
5. Click New on the Billing tab to open the Dues/Subscription Item Detail window.
6. Click New and Save.

> **Note:** Note: To print a list bill, select a list bill renewal notice for the billing cycle.

Billing run troubleshooting

The following list of possible billing problems and solutions can help you in troubleshooting.

Problem

Some old, expired customers were picked up for billing.

Cause

The customer has a Paid Thru date that has been expired for over a year and has never been re-categorized as suspended or as a non-customer.

Solution

Update the customer's status (manually or in mass) to S for suspended or I for inactive, or manually update the customer type from a customer to a non-customer.

Problem

The number of renewal notices printed is greater than the number of customers billed.

Cause

Some customers were manually billed. Generating or printing individual renewal notices does not set the reminder count flag indicating that the renewal notice has been printed. When Printing Options are run separately from the Billing Options, iMIS prints a notice for customers with outstanding balances in which the reminder count is still set to zero.

Solution

The best way to avoid this situation is to select the Billing Options and Printing Options at the same time. To print the initial notices separately, use the Ad hoc Search option to ensure that only the desired notices are printed (for example, those for a specific Bill Date or Run Date).

If you have already encountered the problem and need to reprint only the desired notices, you may be able to work around this situation by printing the initial notices as Reminder Notices. To do this, select First Reminders, for example, and then enter the original Bill Date or Run Date in the both the Begin and End dates of the reminder date range.

> **Note:** Caution! If you have a special notice-specific title or Billing and Reminder Notice text that prints differently for Reminder Notice, this may not be a viable option.

Problem

Too few customers were billed. For example, the pre-billing report shows 1,000 customers have Paid Thru dates expiring within the month. When billing was generated, only 500 notices were generated.

Cause

In order to bill customers, both the Paid Thru date and the Renewed Thru date must be earlier than the billing Effective Date. If too few customers are billed, the problem typically is caused by a Renewed Thru date that is greater than the Effective Date. The Renewed Thru date is advanced to the projected term Paid Thru or expiration date at billing time, preventing the customer from being rebilled for the same customer term in subsequent billing runs. An incorrect Renewed Thru date may result from two different causes:

- A billing run was started but canceled without restoring a backup, or
- The Paid Thru date was manually overridden to an earlier date without a similar modification being made to the Renewed Thru date.

Solution

The Renewed Thru date can be viewed from the individual customer's Financial tab. If only a few customers were missed due to a problem with the Renewed Thru date, the date can be corrected or blanked out through an Edit change and the missed customers can be billed individually (see "Running individual dues billing") by clicking Create Invoice on the Billing tab. If large numbers of customers were missed, you should make mass corrections through a correction script.

> **Note:** Note: You may want to add the Name.PAID_THRU field to the list of Change Logging fields in order to track manual changes made to the Paid Thru date.

Problem

Too many customers were billed. For example, the pre-billing report shows 500 customers have Paid Thru dates expiring within the month. When billing was generated, 1,000 customers were billed.

Cause

This problem usually occurs only on the first dues billing run after conversion to iMIS because billing data, particularly the Renewed Thru date, has not been properly set up during pre-conversion.

This problem may also occur in late billing runs because the Name_Fin records (where the Renewed Thru date is maintained) were not populated in post-conversion. If the Name_Fin record does not exist for the customer at billing time, the billing procedure will not be able to update the Renewed Thru date. This prevents the customer from being rebilled for the same billing term in a subsequent billing run.

Solution

Restore from backup and properly populate the missing Renewed Thru dates.

If the Name_Fin records are missing from a missed post-conversion step, execute the procedure to generate the missing records. Select Utilities> Reports and Queries> Set up tables report type, and execute “Add missing Name_Fin records.”

Problem

Invalid column name error message. When you attempt to bill, you get an SQL error message, such as:

DuesBill1/103 SQL_CHANNEL1 207 Invalid column name “Assets.”

Cause

The column name “Assets” does not exist in the Name_All view because the user-defined table that contains it is not included in the Name_All view.

Solution

Add the table to the Name_All view.

Problem

Invalid column prefix error message. When you attempt to bill, you get an SQL error message, such as:

DuesBill1/103 SQL_CHANNEL1 107 The column prefix 'Name' does not match with a table name or alias name used in the query.

Cause

You have not used the required Name_All prefix in your special pricing formula. Even when you are referencing a field within the Name table, you must set up and cross-reference the Name_All view for all special pricing methods except flat rates.

Solution

Change the prefix in all special pricing field references to Name_All. Be sure to generate the Name_All view.

Problem

Line items are being billed for strange, negative amounts, such as -999.00 or -900.00.

Cause

There is a problem with the application of a special pricing formula during the billing process. This could be caused by:

- The Name_All view does not contain a record for the customers or subscribers who were billed the negative amounts, or
- There is an SQL syntax error in your special pricing calculation.

Solution

Verify the completeness of the Name_All view. Run the following script for one customer who was billed a negative amount:

select ID from Name_All where ID = '101'

Note: Note: Substitute the correct ID in place of 101.

If blank results are returned, the Name_All view is not complete. Check the test script again after populating missing records. Note that the Name_Fin table must also be properly populated in order for the Name_All view to be complete.

If you suspect there may be missing Name_Fin records due to a missed post-conversion step, select Utilities> Reports and Queries. Select the Table Maintenance report type and execute “Add missing Name_Fin records.”

If the Name_All view appears to be complete, check your special pricing formulas for accuracy and correct as needed.

Problem

Customers not being billed for a Dues billing cycle when the Add Member Type Items option is enabled.

Solution

Isolate the problem to a specific customer type/category that is not being billed. Find an individual who should have been billed that has this customer type/category. Verify that the products are set up in the Set up customer types window that the customer type, and that customer and nonmember pricing is correct. Verify that the Name.PAID_THRU date and the Name_Fin.RENEWED_THRU dates are less than the Effective Date. Check the Bill Date in the Billing tab to determine whether the customer was billed, but was billed an incorrect amount. If the customer was billed but billed incorrectly, then verify whether that a special pricing rule was applied.

Run the following SQL query to see if this customer is included in the Name_ALL view: Select ID from Name_ALL where ID = '####'

If this does not return a record, then this customer does not have a record inserted into either the Name_Fin table or in a user-defined table marked “Use for Dues Pricing.”

Problem

Customers not being billed for a non-dues billing cycles when products are manually entered on the Billing tab.

Solution

The subscription record must have been previously created in the Billing tab. Verify the Bill Date on this window to determine if the customer was billed but billed an incorrect amount. If the customer was billed incorrectly, check to see if a special pricing rule was applied. If the customer was not billed, then verify that the Subscriptions.PAID_THRU and Subscriptions.BILL_THRU dates are less than or equal to the Effective Date entered.

Problem

Delays are experienced when processing payments for products on one invoice.

Solution

To speed up processing, add an additional index to the Subscriptions table consisting of INVOICE_REFERENCE_NUM and INVOICE_LINE_NUM.

Problem

You need to add subscription dates to your Renewal Notices.

Solution

Add Subscriptions.BILL_BEGIN in the Parameters window of the report specification. The date will be printed in mm/dd/yyyy format.

Problem

You have a custom field that contains a year and would like to use it for special pricing.

Solution

You can use the SQL Anywhere DATEPART function in special pricing by adding a Name_Custom.MEMBER_YEAR to the Name_All view. The following calculation would then be used for special pricing:

If Name_All.MEMBER_YEAR >= datepart(year,Today(*))
Then 100

Else 200
Endif

The datepart function takes the year from the current date, Today(*).
The “if” statement compares the current year to the Name_All.MEMBER_YEAR, resulting in customers being charged 100 if the Member_Year is greater than the current year, or 200 if the Member_Year is less than the current year.

Problem

You are able to bill individually, but not mass billing or only bill amounts entered as the standard customer or non-customer amounts because special pricing is not being recognized.

Solution

There is a temporary table that is built when running a mass billing which creates a special pricing table for all dues products whether they are included in the billing cycle or not. This temporary table creates the price if special pricing is used, by converting the BASE 1 filed in the Product_Price table to a money field. To verify that there is only numeric data in this field, query the Product_Price table to see if you received any error messages by using the following SQL query:

Select PRODUCT_CODE, BASE_1, PRICE=convert(money,pp.BASE_1) from Product_Price

Problem

If you create a query in MS Query using more than one table, and then try to merge the date in MS Word, the following error message occurs: Word was unable to open the data source.

Solution

An MS Query limitation restricts queries to one table. Perform your queries using only one table or use MS Access to perform the query. For more information, see MS Support Article 193715.

Expired Members

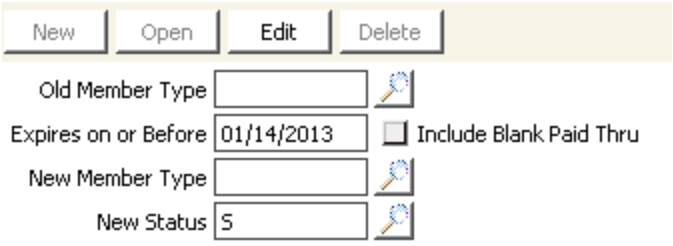
An important maintenance step is dealing with member status and type of those who fail to renew. If member statuses or types aren't changed, they may retain unwarranted access to organizational privileges, and you won't have current records on the overall status of your members. From the Manage expired members window you can process expired memberships throughout your database.

Note that this method makes use of the Paid Thru date in the member's record to perform the status and/or member type conversion. Most users will be set up with cash-based accounting (in Billing system setup), so this utility will work fine. If, however, you are set up for accrual-based accounting, and the Paid Thru dates are updated automatically at each billing, you'll have to convert expired member' statuses by hand, as needed because in some cases accrual updated Paid Thru at payment time.

Managing expired members

To access this conversion utility, select Billing, and select Manage expired members.

Manage expired members window



Admin Console: Home > Membership and Dues > Manage expired members
Desktop: Billing > Manage expired members

Old Member Type

Enter an existing member type that you want to convert or select the lookup icon to select a value.

Expires on or Before

Enter the customer's Paid Thru date.

Include Blank Paid Thru

Check this field if you want the system to find those customers from whom no payment was ever received (resulting in a blank Paid Thru field).

> **Note:** Note: Selecting the Include Blank Paid Thru option may include your newly joined as well as your delinquent customers.

New Member Type

Enter the non-customer type that you want to assign to delinquent or expired customers or select the lookup icon and select a value. You can retain the existing member type designations and simply change their status. To retain the member type, leave the New Member Type field blank.

New Status

(Defaults to S, for Suspended) Enter a status or select the lookup icon to select a value.

To modify a member type or status

> **Note:** Note: Perform the following procedure for a single member type you want to modify. If you have more than one member type to modify, perform the procedure as many times as necessary.

1. Manage expired members window, to open the Manage expired members window, click Edit.
2. Enter the member type you want to modify in the Old Member Type field or click the lookup icon to select a value.
3. Enter the old expiration date to use as the basis of the conversion in the Expires on or Before field. The system finds all of those member types who have a Paid Thru date that matches or precedes the date you enter in this field.

4. (optional) Enable the Include Blank Paid Thru option if you want the system to find those customers from whom no payment was ever received.
5. (optional) Enter the member type you want to assign to delinquent or expired members or select the lookup icon and select a value. You can retain the existing member type designations and simply change their status. To retain the member type, leave the New Member Type field blank.
6. (optional) Enter the New Status or select the lookup icon to select a value. To retain the status, delete the default status of S (Suspended).
7. Click OK.

Date Usage in iMIS

In addition to calculating the billing rate for each product line item, iMIS also calculates a date range to project what a customer's term or subscription will be when the customer pays or renews. Unless manually overridden, the Enter and edit payments window (from Billing, select Enter and edit payments) uses this projected date range to update the new Paid Thru date for each line item when a customer pays a balance in full. When the first cross-referenced customer type item is paid in full, the overall customer Paid Thru date also is updated to agree with that line item's new Paid Thru date.

iMIS uses the following dates:

- Bill Begin - This is the first date of a term through which an individual product line item has been billed, regardless of whether or not payment has been received.
- Billed Thru - This is the ending date of a term through which an individual product line item has been billed, regardless of whether or not payment has been received.
- Paid Thru - This is either the expiration date of a customer's dues or subscription product or the period through which a customer has paid. This date is always the last day of the month.
- Renewed Thru - This is the date through which a customer has been billed for products,

regardless of whether or not the customer has paid. This date determines which customers receive renewal notices.

A number of factors determine the projected product term. After iMIS calculates the begin date, it normally derives the Thru Date to be n months later (minus 1 day), where n represents the billing interval. The following example shows the formula for calculating the Thru Date using an annual and quarterly billing interval.

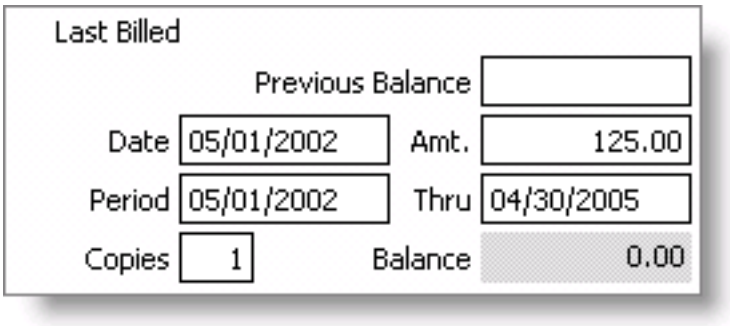
1/01/2003	+	Annual (12)	= 12/31/2003
1/01/2003	+	Quarterly (3)	= 3/31/2003

Viewing the calculated date range

In addition to rates, the projected term is established when the dues billing data is generated either by enabling the Renewals or Rebill option on the Process billing window or by clicking New on the Enter and edit payments window. You can view the dates on the Last Billed section of the Dues/Subscription Item Detail window.

To view the calculated date range

1. From Customers, select Manage customers to open the Manage customers window.
2. Open a customer's record.
3. Select the Billing tab.
4. Double-click a line item to view the Dues/Subscription Item Detail window and the Last Billed section.



Example of the Last Billed section of the Dues/Subscription Item Detail window

The projected term is represented by the Period term begin date and Thru term end date. The Begin Date always falls on the first day of a month and the Thru Date always coincides with the last day of a month.

Calculating dates in billing runs

Calculating the Begin Date for a dues billing run

For a dues billing run, iMIS uses these important factors to determine the Begin Date:

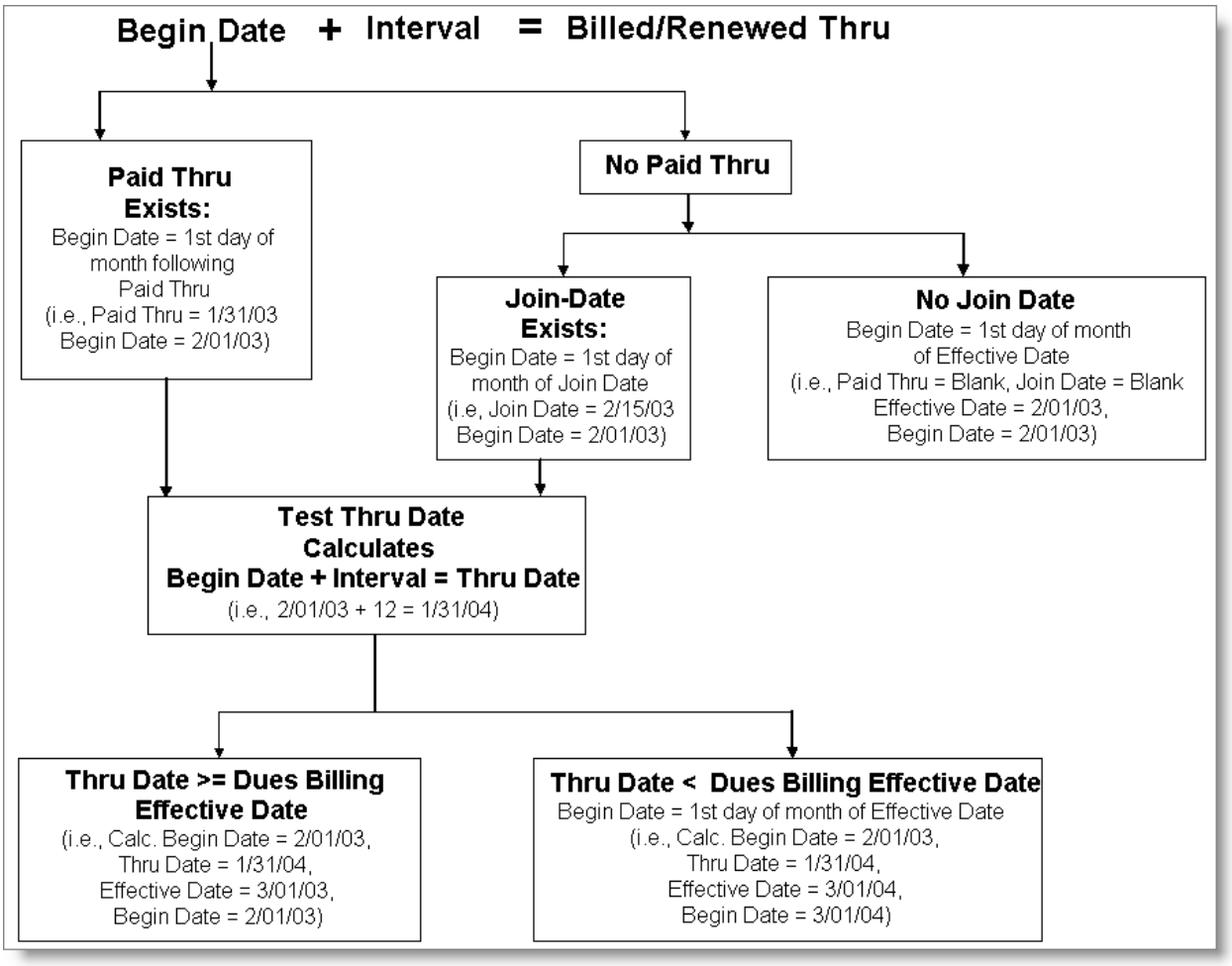
- Whether billing is done on an Anniversary or Annual basis
- The current value of the Paid Thru date
- The Join Date for a new customer
- The Effective Date of the billing run
- The Start Date Control options defined on the Set up general options window

Note: All line items billed on a dues bill have the same calculated Begin Date.

How the Begin Date for an anniversary billing cycle is calculated

Begin Date with no Start Date Control options selected

The following diagram illustrates how the Begin Date is determined for an anniversary dues billing cycle:



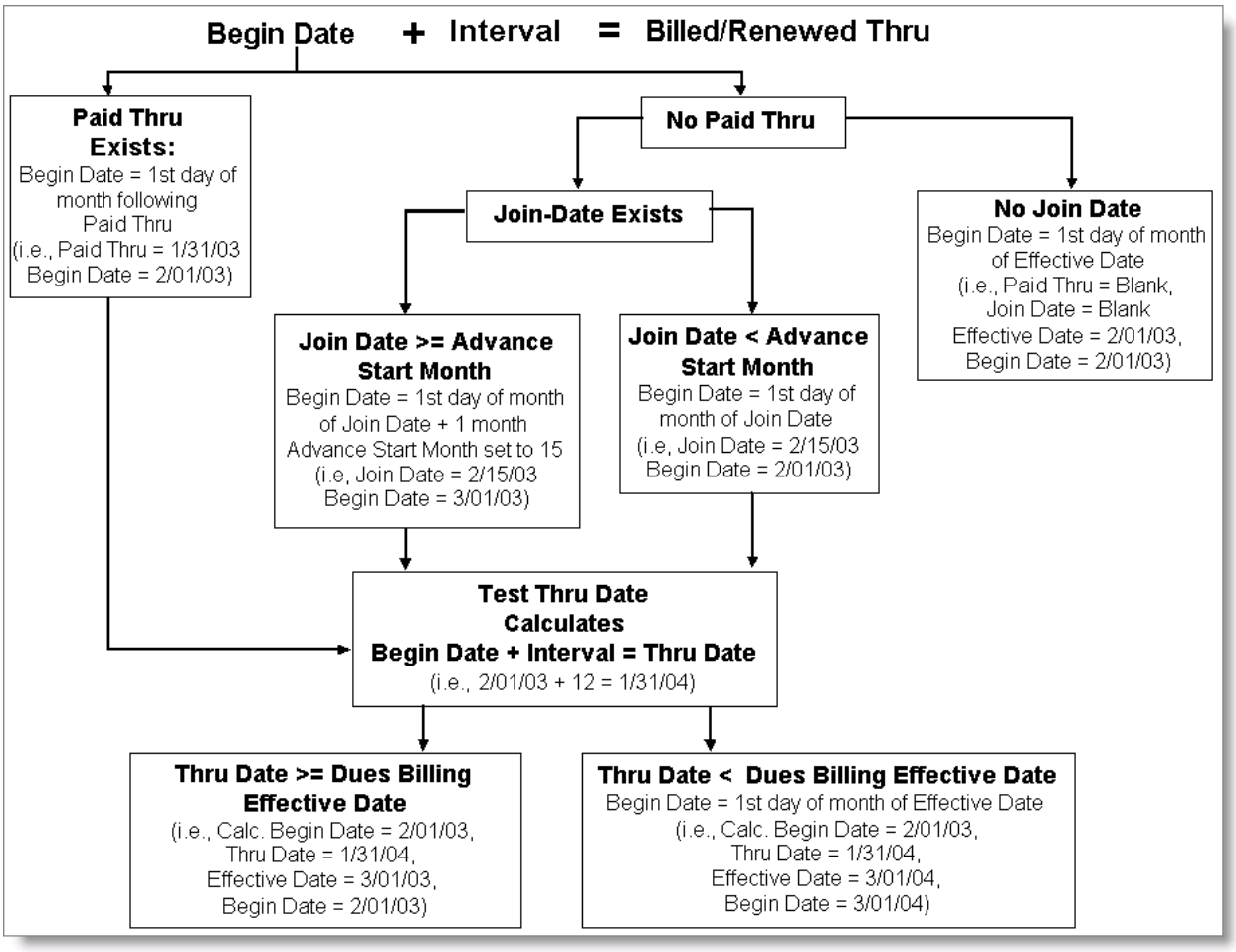
The following table shows examples of the Begin Date calculation using a dues billing Effective Date of 1/01/2004 with a 12-month term interval:

Sally - Renewal	01/01/1996 (NA)	12/31/2003	01/01/2004	Paid Thru
Billy - Did Not Get Billed Yet	12/01/1983 (NA)	11/30/2003	12/01/2003	Paid Thru
John - Hope to Rein-state	1/01/1991 (NA)	12/31/2003	01/01/2004	Effective Date
Mary - New Customer	12/15/2004	Blank	12/01/2004	Join Date

Joyce - New Customer	Blank	Blank	01/01/2004	Effective Date
Dave - Missed the Boat	1/01/1978	Blank	01/01/2004	Effective Date

Begin Date with Start Date Control options selected

The following diagram illustrates how the Begin Date is determined for an anniversary dues billing cycle using the Start Date Control options on the Set up general options window:



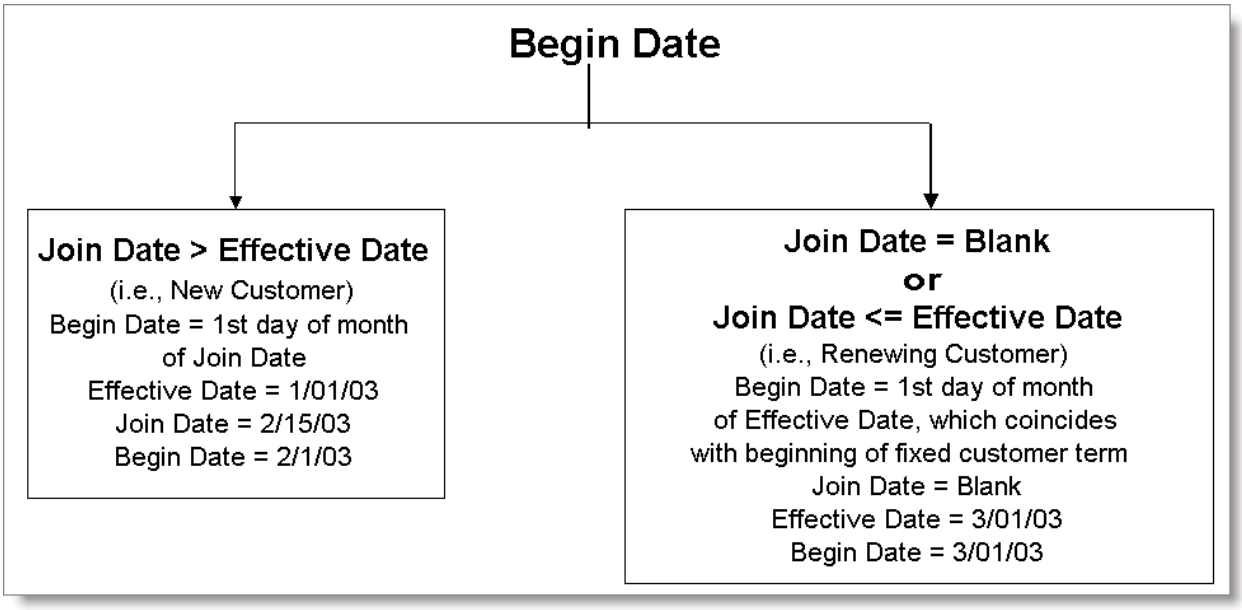
How the Begin Date is determined for an anniversary dues billing cycle.

The following table shows examples of the Begin Date calculation for a 12-month term interval using the Start Date Control options on the Set up general options window:

Mary - New Customer	N/A	04/27/200- 3	25	Yes	Yes	2 months	05/01/2003 - 04/30/2004
Joyce - New Customer	N/A	04/27/200- 3	25	No	No	N/A	04/01/2003 - 03/31/2004
Sally - Renewal	01/01/2002 - 12/31/2002	04/16/200- 3	15	Yes	Yes	3 months	05/01/2003- 04/30/2004
Olga - Old Customer	07/01/2002 - 06/30/2003	08/01/200- 3	15	Yes	Yes	3 months	Term remains the same

Begin Date for an annual billing cycle

The following diagram illustrates how the Begin Date is determined for an annual dues billing cycle.



How the Begin Date is determined for an annual dues billing cycle

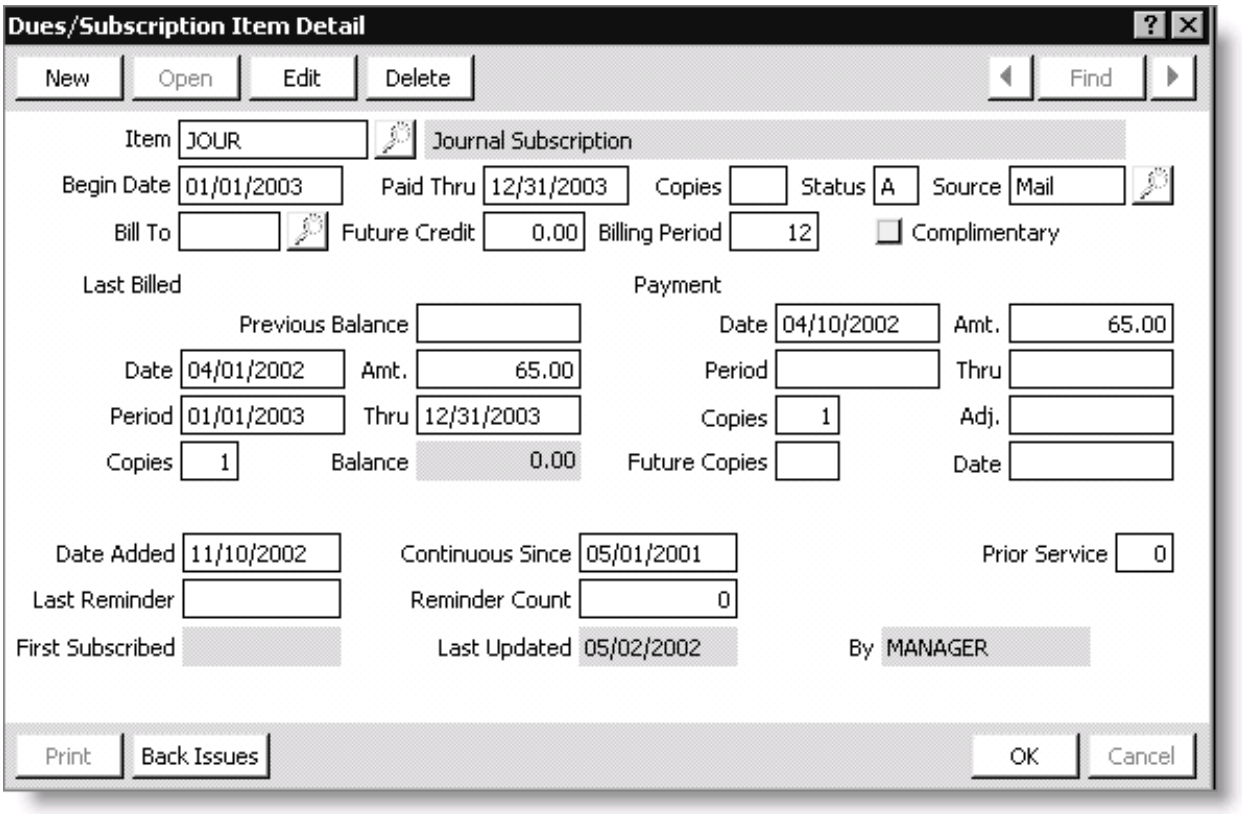
The following table shows examples of the Begin Date calculation using the dues billing Effective Date and fixed annual customer term of 1/01/2003 with a 12-month term interval:

Sally - Renewal	1/01/1996	12/31/2002	1/01/2003	Effective Date
Billy - Paid Thru, Not in Synch	12/01/1983	11/30/2002	1/01/2003	Effective Date
John - Hope to Reinstate	1/01/1991	12/31/2002	1/01/2003	Effective Date
Mary - Mid-term New Customer	7/15/2003	Blank	7/01/2003	Join Date
Joyce - New Customer	Blank	Blank	1/01/2003	Effective Date
Dave - Missed the Boat	1/01/1978	Blank	1/01/2003	Effective Date

Note: Note: If the Paid Thru Date is greater than the Effective Date, the customer is not going to be billed.

Calculating the Begin Date for a non-dues billing run

The same evaluation occurs when determining the Begin Date for a non-dues billing run, except the individual subscription Paid Thru date is used in place of the overall customer Paid Thru date, and the individual subscription Date Added is substituted for the overall customer Join Date. All other processing occurs for a dues billing run (anniversary and annual).

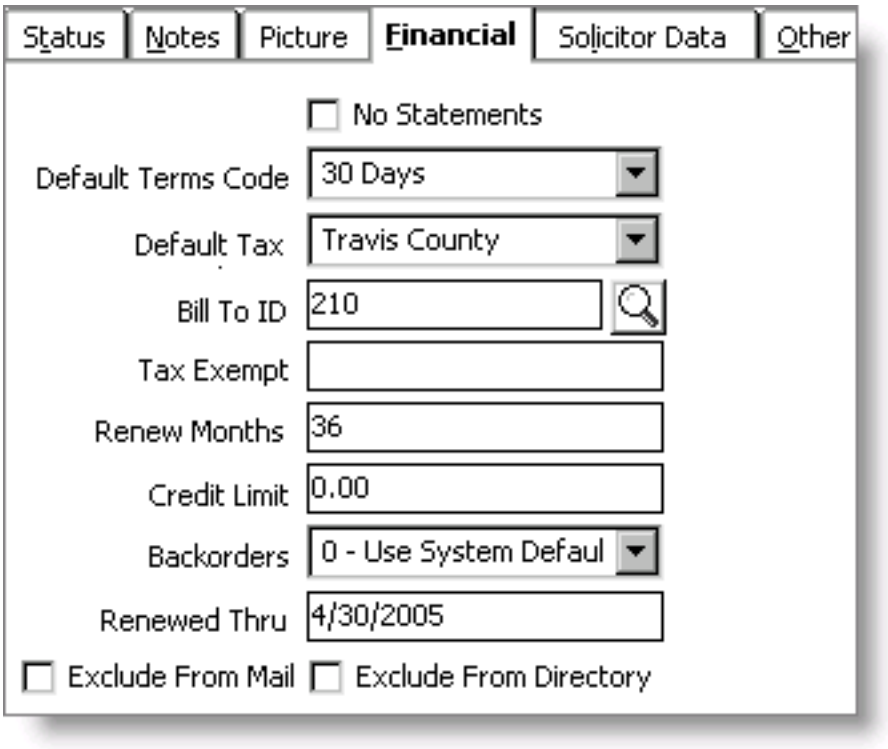


Example of Begin Date calculation for non-dues billing run

Calculating the Billing Interval for a dues billing run

The billing interval for a dues billing run is based upon a specific customer's Renew Months as defined on the Manage customers window's Financial tab (if non-zero) or the default Standard Billing Interval defined on the Set up general options window (from Billing, select Set up module > General options). However, in the case of an annual dues billing cycle, prorating factors may affect the calculated interval.

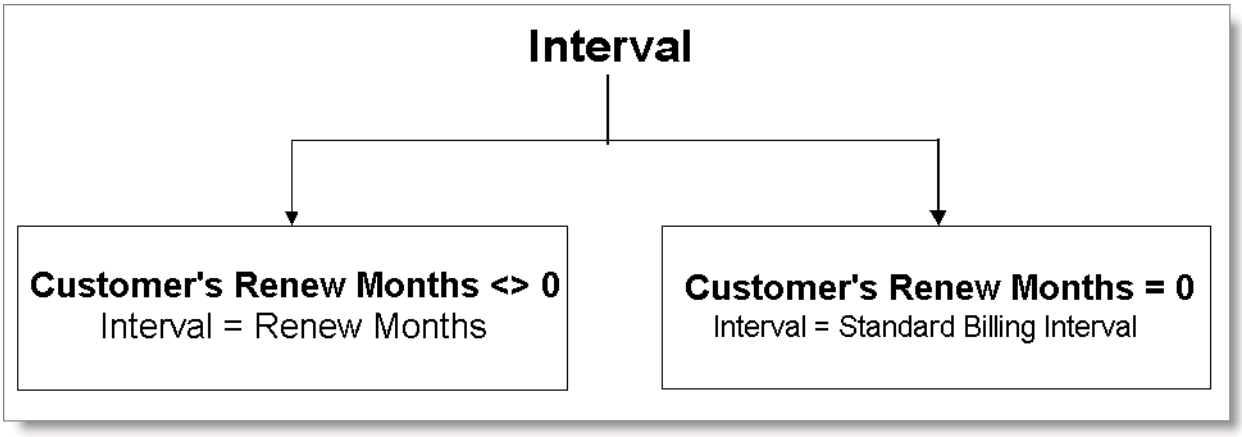
Note: Note: All line items billed on a dues bill have the same interval.



Example of Billing Interval using Renew Months on the Manage customers window Financial tab

Billing interval for anniversary dues billing cycle

The following diagram illustrates how the interval date is determined for an anniversary dues billing cycle.



The following table shows examples of how the billing interval is determined.

Betty - Default	0	12		1/01/2003	12	12/31/2003
Johnny - Quarterly	3	12		1/01/2003	3	3/31/2003
Tommy - Two Year	24	12		1/01/2002	24	12/31/2004

Billing interval for annual dues billing cycle

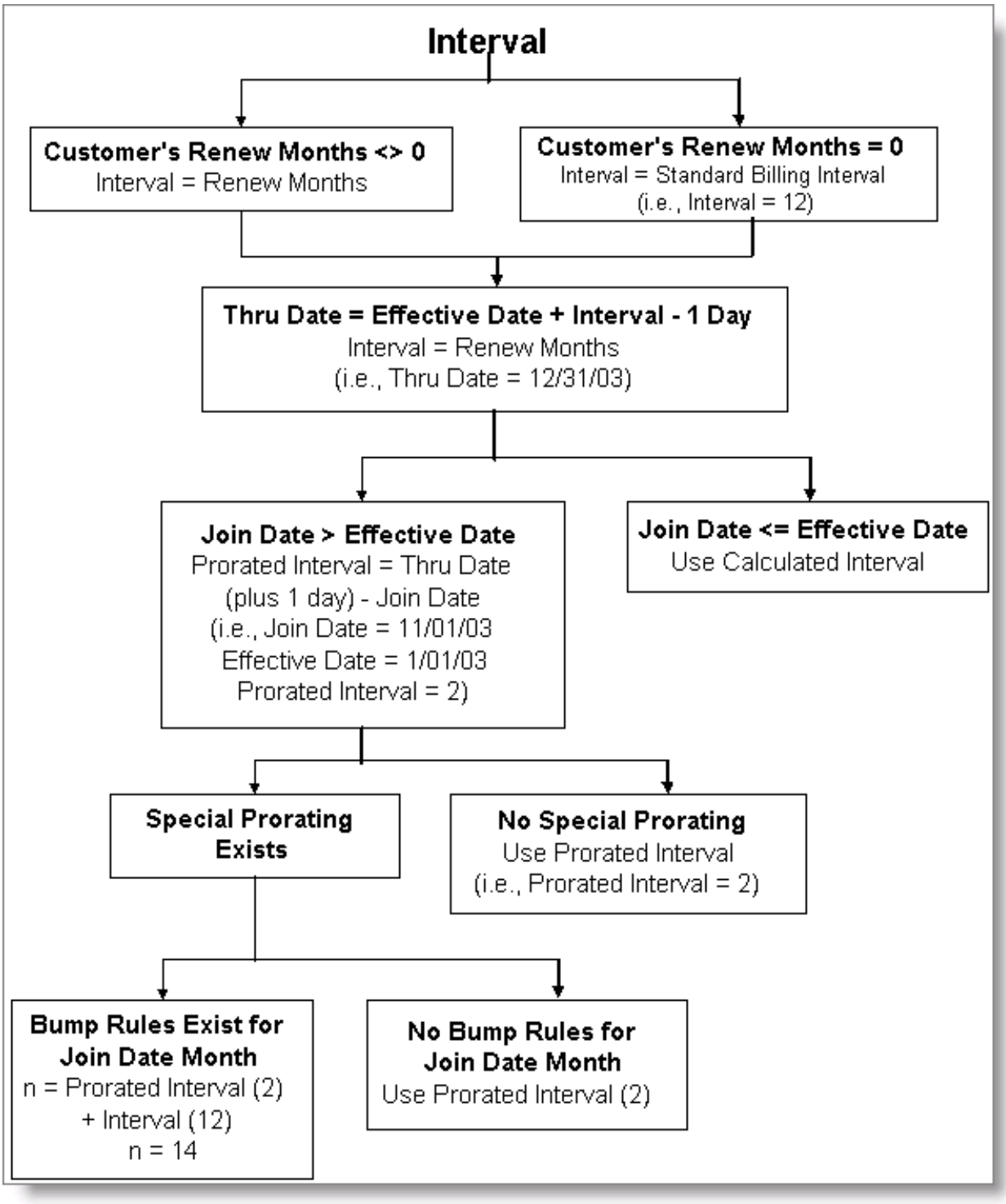
The billing interval calculation for an annual dues billing cycle is slightly different than for the anniversary dues billing cycle. The primary factor used to determine the Thru Date is the Effective Date, to which the interval is added. Although the calculated interval applies to all renewing customers, the interval may be prorated to be shorter (typically) or longer for new customers who join after the fixed customer/subscription term has begun.

> **Note:** Note: For a new customer's interval to be extended, you must set up Special Prorating rules so the “Bump” criteria applies to the customer's join month. See Prorating window.

The following table shows results of the billing interval calculation using a dues billing Effective Date (and fixed annual customer term) of 1/01/2003 with a 12-month Standard Billing Interval.

Betty - Default	0	1/01/1983	N/A	1/01/2003	12	12/31/2003
Johnny - Quarterly	3	1/01/1992	N/A	1/01/2003	3	3/31/2003
Tommy - Two Year	24	1/01/1988	N/A	1/01/2002	24	12/31/2004
Mary - New at Mid Term	0	7/15/2003	No	7/01/2003	6	12/31/2003

Jim - New Quarterly	3	2/01/2003	No	2/01/2003	2	3/31/2003
Sam - Last Minute Joiner	0	11/15/2003	Yes	11/01/2003	14	12/31/2004



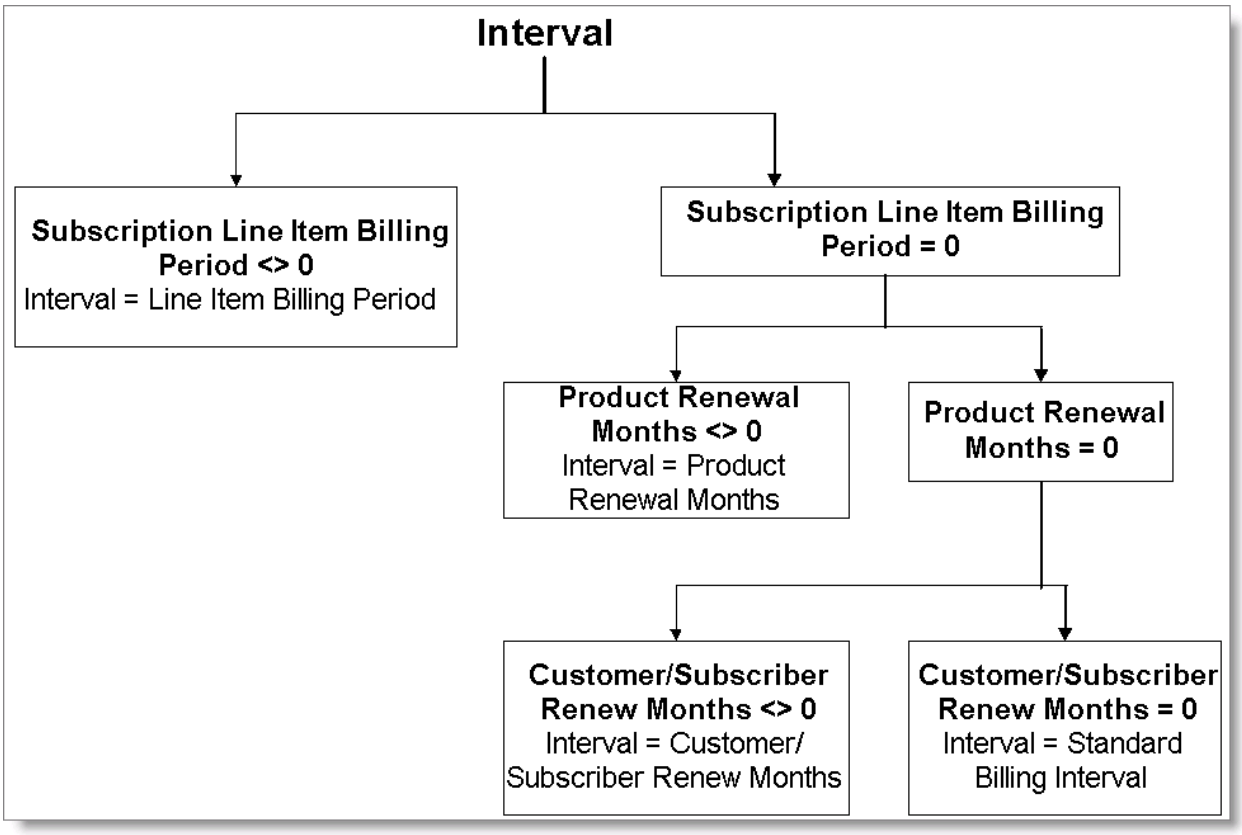
Billing Interval Calculation

Calculating the Billing Interval for a non-dues billing run

The billing interval set at the individual line item level or on the Set up products window takes precedence over the individual subscriber billing interval or the Standard Billing Interval defined on the Set up module window.

Billing interval for anniversary non-dues billing cycle

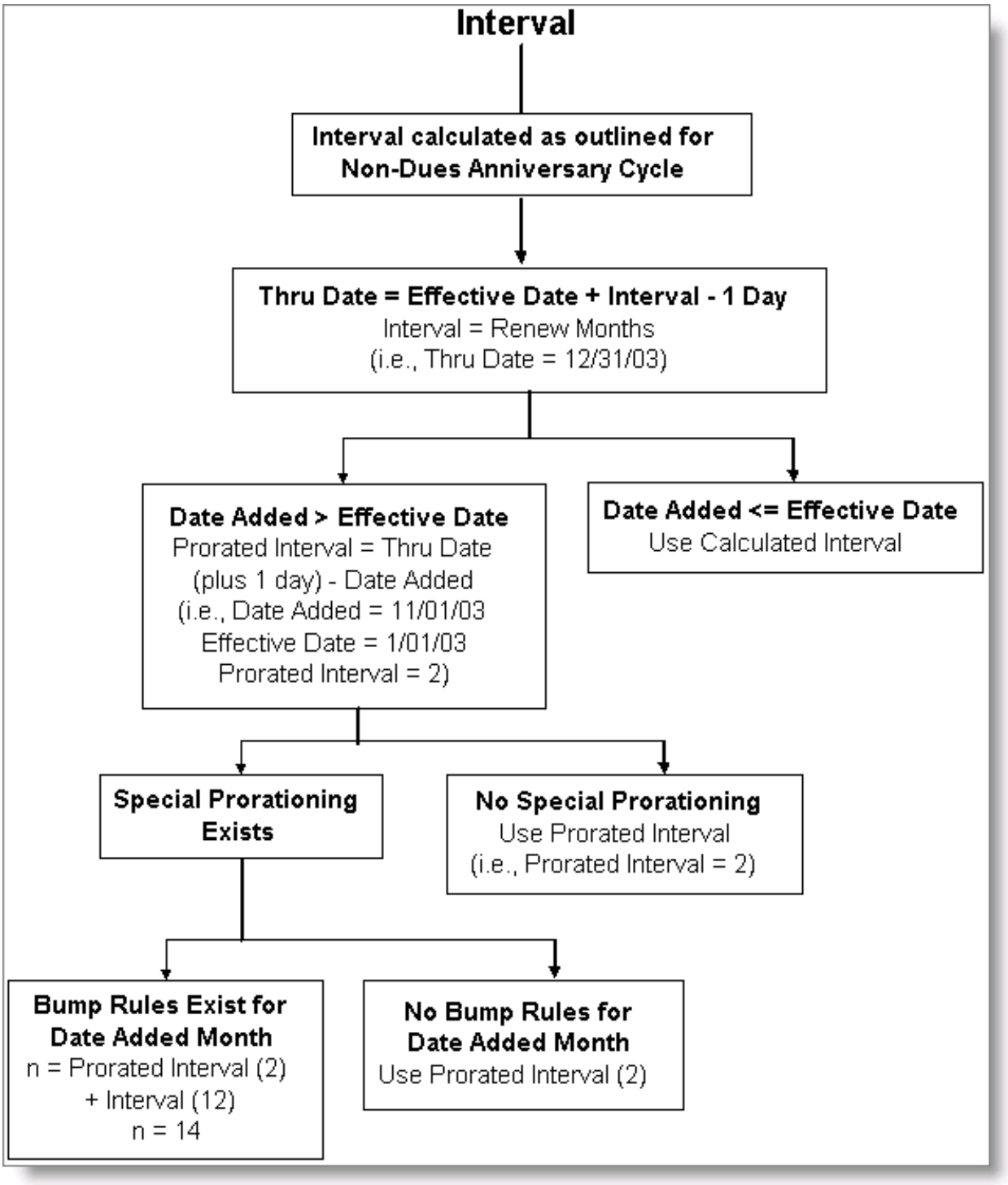
This is how the billing interval for anniversary cycles is determined:



Billing interval for anniversary billing cycle

Billing interval for annual non-dues billing cycle

The non-dues interval is calculated for an annual billing cycle using the non-dues anniversary billing cycle interval and then applying the same prorated or extended-term rules that are used in the dues annual billing cycle, except that it substitutes the line item's Date Added in place of the customer's Join Date.



Billing interval for annual billing cycle

Billing Payment Importer

iMIS Billing Payment Importer provides you with the ability to import financial transactions into iMIS, also referred to as “lockbox processing.” The importer is designed to import and process mass payment data from an external import file, allowing you to avoid entering this data manually, transaction by transaction. This module helps you if your payments are received and recorded by an outside organization, such as a bank (lockbox) or an affiliated organization, if this organization can supply the payment data in a usable electronic form.

This module requires at least two data elements to be resident in your import files: the payment amount and the customer ID (either the primary ID or the Major Key of each customer who has paid). For example, if you will be receiving data from an affiliated organization, such as the national or state organization and the receiving organization does not know the customer ID, be sure to have an organization-wide common identifier (such as a certificate number) in the data. You must maintain this common identifier in the Major Key field.

The benefits of using this interface instead of simply importing the data include the following:

- Provides a single interface for iMIS Billing payment transactions
- Uses the payment records to create dues payment transactions, which debit cash and credit income or deferred income
- Automatically applies each customer payment record amount to that customer's open balances until those balances are closed
- Any residual payment amount creates open credit balances, which you can refund or apply to future sales

The payment data that is imported will only be applied to a line item that already exists on the customer's Billing tab and has an outstanding positive balance. Importing payment data will not create new line items nor apply an amount against a line item that has a zero or negative balance. If the imported payment exceeds the balance, an overpayment will

be applied to the line item. If the line item does not exist, an open AR credit invoice will be created for the payment amount.

To enable the Billing Payment Importer

As with all iMIS modules, you must have this system enabled on the iMIS System Setup level. Refer to your service provider for more details.

To format billing data for import

The transaction format is tab- or comma-delimited input, with various types of records allowed in a single stream. The import file must contain a single batch header record, followed by any number of cash payment records.

> **Note:** Note: You cannot use the Dues Importer for accrual Dues billing cycle. You must use the AR Importer for accrual dues billing. To use the AR Importer, the System field (third field) under the Cash Payment Record should be AR. Make sure to insert the Invoice Number (sixth field) under the Cash Payment Record.

The major transaction formats include the following:

All Records

1	Record Type		Identifies the type of record
2	Batch Number	10 chars, all upper case	

Batch Header

1	Record Type	BH	Always “BH”
2	Batch Number	10 chars, all upper case	

3	Batch Date	Date	Date of batch
4	Batch Description	60 chars	
5	Control Count	Numeric	Optional
6	Control Amount	Monetary	Total of the batch of payments
7	Cash Account Code	10 chars, all upper case	Code assigned through AR/Cash> Set up tables > Cash accounts; indicates the cash account where the funds were deposited

Cash Payment Record

1	Record Type	PAY	Always “PAY”
2	Batch Number	10 chars, all upper case	Optional; if blank, defaults to batch header's batch number
3	System	DUES	
4	Member ID	10 chars, customer ID	Can substitute Major Key, if prefixed with * (asterisk)
5	Date	Date	Optional; if blank, defaults to batch header date
6	Product Code	Character	Optional; payments can be applied to specific Product Codes by including the Product Code in this field
7	Amount	Individual payment amount	Total amount of the check or credit card payment
8	Check/CCType	Check # or credit card type	Optional

9	CCNumber	Credit card #	Optional
10	CCExp	Credit card exp	Optional
11	Name On CC	Name on credit card	Optional
12	CCAuthorize	Credit card authorization code	Optional
13	Name	60 chars for audit trail	Optional but important. Will print on the transaction report to identify the customer/subscriber.
14	Comment	255 chars	Optional but important. Will print on the transaction report and related inquiries to explain the transaction, such as “Dues Payment” or “Subscription Payment."

Example billing import file

In the following import file example, two cash payment records follow the batch header line. Make sure that your Cash Account code exactly matches the setting on the Set up cash accounts window.

BH,DUES030802,3/08/02,Dues Payments for 3/08/02,,195.00,CASH

PAY,DUES030802,DUES,152,3/08/02,,95.00,1234,,,,Marcie Farmhaven,,,Dues Payment

PAY,DUES030801,DUES,111,3/08/02,,100.00,VISA,4610-8904-4005-4568,9/02,,C98084,Richard Harris,Dues Payment

Note: Note: If your import fails, check your import file for stray spaces, missing tabs, and so forth.

To review history before importing billing transactions

Before you introduce third-party transactions into your iMIS data file, view the relevant payment history for items such as dues for a sample customer (one who will be affected by the incoming data).

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Billing tab.
4. Click the History or Current button located at the bottom of the Billing tab. This is where your imported transactions should appear after the import process.

   Note: You can review the outstanding balances by printing the Open Items by Name report.

   To perform the billing import

   > **Note:** Caution! Back up your database. Before performing the import, it is very important that you make a current backup of your iMIS database. If your import is in error, you can restore your database from the backup copy; otherwise, you must manually delete each transaction in the imported batch.

1. From AR/Cash, select Enter and edit transactions> Import transactions to open the Select import file window.
2. Select the tab- or comma-delimited file that you prepared.

   Note: If a message is displayed indicating that the Cash Account code does not exist, check that the name of the Cash Account code in your import file matches the one in your iMIS-system Cash Account Table on the Set up cash accounts window.
3. When complete, open the Manage batches window.
4. To review the results of the import, select the open import batch on the Open Batches window and click Print Selected.

5. (optional) To finalize the transactions, select the open import batch on the Open Batches window and click Post Selected.

   To verify the billing import

   To verify that your transactions have correctly posted to your iMIS data file, view the relevant payment history again for your sample customer:

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Billing tab.
4. Click History and compare the contents of the History view, where the imported transactions should appear. Note whether the Paid Thru date advanced.

   To view open credits from a billing import

   If the payment amount imported was larger than the total outstanding balance for a customer, the amount of the overpayment automatically creates an open credit. To view overpayments by an individual:

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the AR/Cash tab.

Billing

Billing Overview

The iMIS Billing feature enables you to process billing and record- related cash receipts for all categories of customers, whether your processing requirements are simple or sophisticated.

The four main functions of the Billing feature include the following:

- Producing billing documents, including Reminder Notices, Renewal Notices, and reports.
- Recording billing payments.
- Tracking long-term subscriptions and payment histories.
- Customizing your billing and renewal processes to fit the needs of your organization.

The Billing system is designed to manage the billing process for cyclical-type products. Cyclical products typically include dues, magazine and journal subscriptions, as well as other products that cover a set time period before becoming eligible for renewal. Billing manages mass renewal processing to bill a group of customers whose cyclical terms are nearing expiration as well as the individual on-demand billing of customers for either renewal or initial billing purposes. For new customers the billing process can be streamlined to be processed simultaneously with recording the payment for the products in a one-step approach

Billing can accommodate a variety of billing situations and scenarios, including those discussed in the following sections.

Dues billing versus non-dues billing

The billing and renewal processes depend on key dates and other factors that signify when a bill should be generated as well as the term (or date range) for which the product is being billed.

Within iMIS Billing, there are two distinct approaches to billing, Dues billing and Non-Dues billing.

Dues billing

Dues billing uses the overall customer to determine the dates and rules for billing. With this approach, multiple products can be billed at one time (i.e., national as well as regional products, optional section or journal products, and voluntary contributions), but the term for all of the products is synchronized in accordance with the key dates and rules tied to the customer. Likewise, the determination of when to generate the bill is also made at the customer level.

Non-dues billing

Non-Dues billing uses the individual subscription to determine the dates and rules for billing. This type of billing is typically used for non-membership dues cycles, such as those established for independent journal billings. With non-dues billing, you can billed the customer simultaneously for multiple products, but only if the cycle incorporates multiple products and then, only if the dates and rules tied to the multiple products happen to coincide.

iMIS can perform a mixture of Dues billing and Non-Dues billing processes. A customer can be billed for one or more products in the context of a membership “Dues Billing” and be subsequently and independently billed for other cyclical products, such as journal subscriptions or insurance.

A table maintenance setup option determines whether a particular billing should use the customer (Dues Billing) or individual subscription (Non-Dues Billing) to determine when to bill and what period to cover.

Annual versus anniversary billing

iMIS Billing can be processed on either an annual basis in which all renewing customers are billed based upon a fixed term such as a fiscal year, or on an anniversary basis in which the renewal billing is tied to the anniversary of the join date or initial term begin date for the cyclical product. iMIS can perform a mixture of annual and anniversary billing processes. It is entirely possible for a customer to be billed on an annual basis for membership dues and on an anniversary basis for an independently billed subscription, or vice versa.

Cash-based versus accrual-based accounting

Although the rest of iMIS uses accrual-based accounting methods, cash-based accounting is the preferred setup for recording customer billing. Cash-based accounting recognizes income only when payment is received, not when a customer is billed. Cash-based accounting is the preferred method for billing because billing payments are always an optional payment for the customer. Open A/R items are created when the accrual-based accounting method is used. If a customer does not make a payment by the end of the defined grace period, the A/R items must be reversed with adjusting transactions.

iMIS Billing terminology

The following terms are frequently used in the Billing module:

Accrual Accounting

Accounting method that recognizes income when income is earned, regardless of when or whether the payment is received. Accounts Receivable open items are created when bills and invoices are generated.

Anniversary Billing

Used when the membership terms fluctuate; usually corresponds to each customer's Join Month or subscription Begin Month.

Annual Billing

Used when all renewing customers have the same Begin and End dates. The Begin Date could vary for new customers who join later in the year, and their dues can be prorated for a partial term.

Batch

A group of transactions identified by a unique name or number.

Bill Begin

Projected Begin Date for an individual dues or subscription product. Refers to the first date of a term through which the item has been billed, whether or not payment has been received.

Billed Thru

Refers to the projected Paid Thru date (expiration date) for an individual dues or subscription product. It is the term ending date through which the item has been billed, whether or not payment has been received.

Billing Category

Optional subcategories of the customer type which define dues amounts when the customer type is not specific enough for an association's needs.

Billing Cycle

A defined billing run set up to bill a particular group of people for a particular set of products.

Billing Interval

Indicates how frequently customers are billed (The interval can be annual, semi-annual, quarterly, monthly, and so forth.)

Billing Term

The period of time between the beginning and ending dates for the services or products that are being billed.

Cash Accounting

The accounting method that recognizes income when payment is received, regardless of when bills or invoices were generated.

Credit

An amount used for accounting purposes that is represented on the right side of the accounting journal (or T) entries. Liabilities, equity, and income accounts carry credit bal-

ances in the General Ledger, so credit transaction amounts posted to them increase balances, while credits to asset and expense accounts decrease them.

Customer

A person who has met the membership criteria set up by the association.

Customer Type

Categories of membership that define the membership levels and amount charged for membership, or dues and subscriptions.

Debit

A positive amount used for accounting purposes that is represented on the left side of the accounting journal (or T) entries. Assets and expenses carry debit balances, so debit transaction amounts posted to these accounts increase their balances.

Effective Date

The date used to determine which customers will be billed. Normally, a customer or subscriber will be billed if they have met the billing selection criteria, their Paid Thru date is before the Effective Date, and if a renewal has not already been generated.

If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

List Billing

The generation of a single renewal notice to a Bill To third party, such as a company who will be responsible for paying the fees for multiple customers or subscribers.

Paid Thru

Refers to the expiration date of the membership or subscription, or the period through which the customer has paid. It is always the last day of the month.

Prorating

Allocating or assigning an amount to an activity or product that is proportional to some base (determined by a formula or procedure).

Renewal Notice

Refers to the request for renewal or continuation of a membership or subscription beyond the current expiration (Paid Thru) date.

Renewed Thru

Refers to the projected Paid Thru date for an overall membership. It is the term ending date through which the customer has been billed, whether or not payment has been received.

Subscriber

Individual, either customer or non-customer, who has purchased a product of a cyclical nature having a fixed term which can be renewed or repurchased upon term expiration.

Navigation for Billing

To gain access to the Billing task list items, select Billing from the navigation bar and the following task list displays.

Enter and edit payments

Select this task to enter payments received from customers.

Process billing

Select this task to bill customers and generate renewal notices. Use this option to specify which billing cycle to use and to select billing options (renewals).

Process accrual dues

(Displays when the Accrual accounting method is enabled on the Set up general options window.) Select this task to view all mass billing batches and print billing-oriented detail and summary reports for review and posting, and to enter adjustments that reduce or reverse normal open AR items.

Generate reports

Select this task to print customer cards, invoices, tables, and transaction lists.

Manage expired members

Select this task to process customers whose customer term has expired.

Set up module

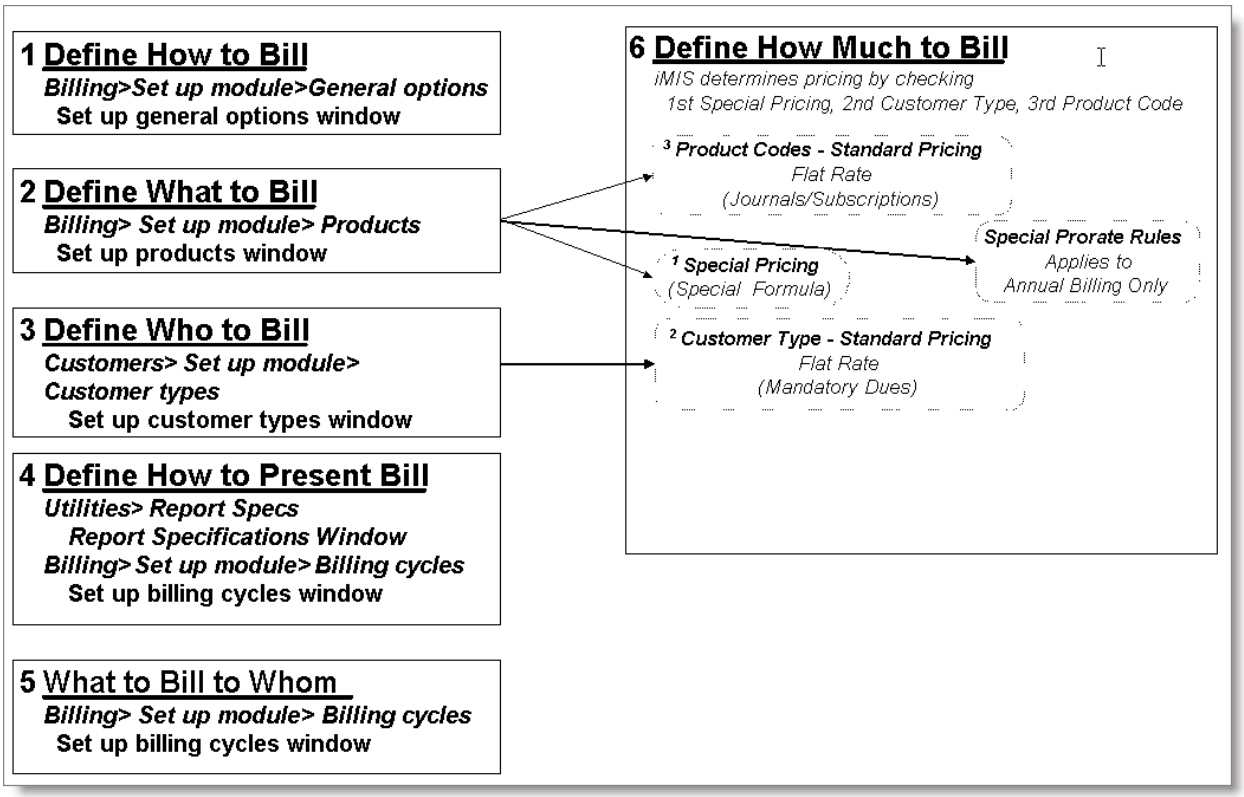
Select this task to set up general billing options, define billing cycles, and create products for billing.

Understanding the billing process

The Billing process includes the following steps:

1. Define who needs to be billed according to customer type and an optional category.
2. Decide for which billing products they are going to be billed and specify how to calculate the charges. In Billing system setup, you define product codes for customer billing.
3. Specify when to generate renewal notices. iMIS calculates renewal notices automatically by monitoring customers' Paid Thru (expiration) dates. Renewal notices can be processed individually or in batches.

The following diagram is an overview of the Billing setup process.



Billing setup process

These are the topics related to these processes:

- How to Bill: Performing Billing for Cash Dues (see "Cash Dues Billing")
- What to Bill: Defining Product Codes
- Who to Bill: Setting up Customer Types
- How to Present the Bill: Customizing the Renewal Notice Formats, Creating Billing Cycles
- What to Bill to Whom: Creating Billing Cycles
- How Much to Bill: Defining Special Pricing, Defining Prorating Rules
- How to Set Up List Billing: Setting up List Billing

Billing product codes

In iMIS Billing, you can categorize your product codes according to the following product-billing types:

- DUES - Represents customer fee items. Products of this type are usually specified for a given customer type (indicated in the Set up customer types window) to enable billing.
- VOL - Represents voluntary items such as donations or PAC (Political Action Committee) contributions. If suggested amounts are billed on an initial renewal notice, open balances for this type of dues product will not appear on the Reminder Notices unless other non-voluntary item(s) with open balances appear as well.
- MISC - Typically used for miscellaneous charges such as initiation fees. If one-time miscellaneous fees of this nature exist, special pricing rules must be defined to dictate the conditions for charging for when and how much to charge for the miscellaneous item. For example, special pricing rules that are based on Join Date.
- SEC - Represents optional additional section organizations, such as professional activity groups. This type should not be entered on the Set up customer types window, because SEC represents only groups that are joined on request. After section items have been subscribed to, the section items appear on Initial and Reminder Notices.
- CHAPT - Products that are defined as CHAPT are automatically created when the Chapter field is populated on the Manage customers window. This designation is used for optional chapter organizations that are available in addition to regular organizations. This type should not be entered on the Set up customer types window because chapter organizations vary from customer to customer.
- SUB - Represents optional billing products, such as journals and magazines that are available in addition to regular memberships. Generally, this type should not be entered on the Set up customer types window because subscription items are ordered only on request (unless they are mandatory and will be billed to all customers). After being subscribed to, SUB items appear on subsequent renewal billings.

Billing cycles

Billing setup enables you to define the billing cycles used to bill a particular group of customers for a particular group of products. The main types of billing cycles include:

- Dues Billing - A billing run used to collect dues for a given set of customers grouped by type, category, or both. This billing run has the Add Member Type Items options enabled.
- Non-Dues Billing - A separate billing run used to collect payments for optional products for customers.

Customer renewal notices

There are three format options for standard Dues Billing and Renewal Notices:

- Plain paper formats that can be customized with an organization's text.
- A variety of preprinted renewal notice forms (displayed in the Authorized iMIS Forms Catalog) are available for purchase. This catalog is a reliable source for quality forms compatible with iMIS, and is available by contacting the form supplier. The supplier's contact information is printed in the catalog.
- Crystal Report options for which both the format and text messages can be customized.

Billing reports

The Generate reports task list item on the Billing task list functions in a manner similar to other iMIS modules. The standard report formats provide a variety of billing cash receipts and other billing-related reports. These reports list unpaid customers and daily and monthly transactions (as they are exported to your General Ledger).

Renewal billing and payment workflow

Whether billing is processed using the cash or accrual accounting method, the initial renewal billing is processed in the same manner. Follow-up reminder notices can also be processed identically thru the Billing system, although optionally, accrual-based open invoices can also appear on Accounts Receivable statements. In addition, the recording of payments varies slightly for cash-based billing and accrual-based open invoices.

Process for Cash Basis

The following describes a typical scenario of the steps involved in the renewal billing and payment process using the cash accounting method:

1. (Recommended) Run a pre-billing report and review the results to verify the correct group will be billed.
2. Make the appropriate selections on the Process billing window to bill the desired group and print the renewal notices.
3. iMIS will update the Billed Thru date so that non-paid customers will not get billed again in subsequent billing runs intended for a different group of customers. It also will create non-accounting or memo only open items (in the Subscriptions file) for each customer and product billed.
4. If corrections are necessary, appropriate set up adjustments can be made and customers can be rebilled on either an individual or mass- billing basis.
5. Payments are recorded on the Enter and edit payments window. Payment totals are automatically applied to open items using appropriate priority ordering, although the line item application can be overridden.

   iMIS updates the Paid Thru or expiration date to the new date, creates the cash-based accounting transactions, and creates billing history (activity) records for each billing product paid.
6. At appropriate age intervals, selections are made on the Process billing window to print reminder notices for those customers who have not paid.
7. After a grace period, delinquent customers (dues product billing only) can be suspended on a mass billing basis on the Manage expired members window so that they will no longer receive services.

   If a suspended customer subsequently pays, they may become reinstated. It is possible to set up the system so that a reinstated customer will have an altered customer term from the one originally billed.

   Process for Accrual Basis

The steps vary slightly for accrual-based products. The following is a typical workflow scenario for billings processed on an accrual basis:

1. (Recommended) Run a pre-billing report and review the results to verify the correct group will be billed.
2. Make the appropriate selections on the Process billing window (from Billing, select Process billing) to generate proposed billing data.

   iMIS will create a batch of unposted transactions that should be reviewed and either finalized or deleted.
3. Print the batch detail and/or summary report and review the results.

- If the results are incorrect, delete the batch, make appropriate setup adjustments, and try again.
- If the results are correct, post the batch.
  iMIS will update the Billed Thru date, and if opted for in system setup, also the Paid Thru date (not recommended). It also will create the accrual accounting entries to recognize income/deferred income, which in turn post to and create a summary invoice for each bill generated.

4. Make the appropriate selections on the Process billing window to generate the Initial Bills or Renewal Invoices.
5. As payments are received, they are recorded to the accrual invoice on the Enter and edit cash receipts window.

   The accrual invoice is reflected as a summary amount on the Enter and edit cash receipts window . If multiple line items were billed in relationship to the invoice, the payment will be automatically applied to the corresponding line items. If a partial payment is entered, the payment will be applied on either a priority or proportional basis.

   iMIS updates the Paid Thru or expiration date to the new date (if the system setup option is enabled), creates the transactions to record cash and reverse Accounts Receivable and creates billing history (activity) records for each billing product paid.

6. If adjustments are required, such as billed line items that need to be reversed (or increased), such adjustments should be made before the payment is made on the Enter and edit credit memos window or the Enter or edit debit memos window so that the payment does not get applied to reversed items or gets applied for the correct amount to otherwise adjusted items.
7. At appropriate age intervals, appropriate selections are made on the Process billing window to print reminder notices for those customers who have not paid. Optionally, the open invoices can simply be printed on the standard Accounts Receivable Statements.
8. After a grace period, reverse all remaining unpaid invoices through the Enter and edit credit memos window and manually change the customer's or subscription product's status to suspended or inactive.

Cash Dues Billing

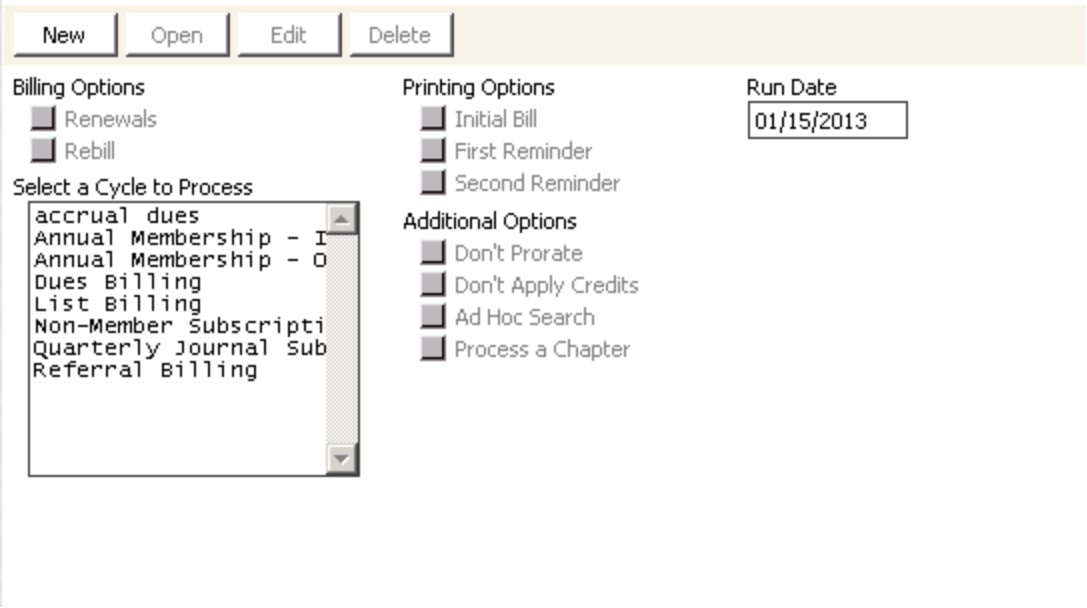
The billing process involves entering payments, updating billing expiration (Paid Thru) dates in each customer's record, creating history (activity) records for each customer and line item paid, and generating cash/income accounting transactions that produce reports and then post to the GL interface.

The billing procedure is designed to be as automatic as possible, minimizing extra steps and user intervention. Within one window, you can generate initial and reminder notices, produce bills for a large group of customers, perform individual and mass billing, and run bills for specific selection criteria such as customer type, Paid Thru date, and Renewed Thru date.

iMIS Billing allows multiple line items for each dues bill-up to ten standard items per customer type and optional subscription, section, and chapter lines. The billing periods can be set up at a system-wide default interval and overridden at the individual customer or product level. Intervals can be controlled to affect the billing amounts and the expiration (Paid Thru) dates.

> **Note:** Caution! Billing affects critical data throughout the database. Never generate Renewal Notices without first creating a backup copy of your iMIS data!

Bill membership dues window



Admin Console: Home > Membership and Dues > Bill membership dues
Desktop: Billing > Process billing

Billing Options

Use the options in this section to specify the type of billing process to run.

Renewals - Select this option to generate new billing data for customers who match the billing cycle parameters. When this option is selected, the Effective Date field displays.

Rebill - Select this option to generate an invoice to correct a billing run generated previously. The Rebill option recalculates the billing data only if it finds a customer who was originally billed within the Begin Rebill Date and End Rebill Date range.

> **Note:** Note: Both the Renewals and Rebill options can be selected to bill other renewal candidates who fit the cycle and Effective Date criteria and who did not get billed earlier (for example, if an earlier bill run was canceled).

Printing Options

Use this section to indicate which notices are to be printed.

Initial Bill - Selecting this option prints an invoice when a customer's Paid Thru date expires before the Effective Date and the customer has not been billed previously for the term currently being billed. Select Initial Bill to print Renewal Notices for those customers whose billing dates are generated through the Billing Options selection.

First Reminder -- When selected, this option displays the 1st Reminder Start and 1st Reminder End date fields. This option prints a first reminder for those customers whose Initial Bill was run between the 1st Reminder Start and 1st Reminder End dates and who are currently not paid.

Second Reminder -- When selected, this option displays the 2nd Reminder Start and 2nd Reminder End date fields. This option prints a second reminder for those customers who were sent first reminders between the 2nd Reminder Start and 2nd Reminder End dates and who are currently not paid.

A reminder will be printed if the following criteria are met:

- The original run date falls within the reminder Start and End date range, inclusive,
- There is still at least one non-voluntary line item open, and
- The Paid Thru date has not been advanced.

Run Date

(Defaults to the current system date) Specifies when the billing run is processed. This date can be overwritten.

Effective Date

Specifies the first date of the new customer term for individuals to be included in the billing cycle. The Effective Date is a very important factor in determining who gets billed.

All customers who meet the other selection criteria and have a Paid Thru date before the Effective Date will be billed if a renewal has not already been generated. For example, if

you enter 9/1/2001 in the Effective Date field, iMIS will bill renewals to individuals who have a Paid Thru date of 8/31/2001 or earlier and have not been billed previously.

For anniversary billing cycles, the Effective Date is calculated based on the Initial Bill Cut Off parameters set on the Billing and Reminder Notices window (from Billing, select Set up module > Billing cycles, select Bills/Reminders).

For annual billing cycles, the Effective Date is set to the first day of the current fiscal year based on the First Month of Fiscal Year field set on the AR/Cash Set up module window (from AR/Cash, select Set up module).

> **Note:** Caution! If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

Select a Cycle to Process

This section contains a list of billing cycles created on the Set up billing cycles window.

Additional Options

Use this section to specify additional billing options.

Don't Prorate - Enable this checkbox to override prorating options set on the Set up general options window (from Billing, select Set up module > General) or the Set up products window (from Billing, select Set up module > Products). This option bills full-term amounts in all cases.

Don't Apply Credits - Enable this checkbox if you do not want to apply any outstanding AVAIL_CREDIT credit amounts to the renewal calculation run.

Ad Hoc Search - Enable this checkbox to generate additional restriction of the billing cycle based on the Name table.

Process a Chapter - Enable this checkbox to allow the selection of a specific chapter for dues product billing run. If a chapter is selected, only those records selected in the billing cycle whose main chapter code matches the selected chapter will be billed.

Begin Rebill Date

Use to indicate the beginning date of a billing run to correct a billing run previously processed.

End Rebill Date

Use to indicate the ending date of a billing run to correct a billing run previously processed.

Reminder Start

Default date is based on the First Reminder Start parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Reminder End

Default date is based on the First Reminder Cut Off parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Reminder Start

Default date is based on the Second Reminder Start parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Reminder End

Default date is based on the Second Reminder Cut Off parameter set on the Billing and Reminder Notices window. This date can be overwritten.

Run button

Used to generate and print invoices to your report destination (select File> Report Destination).

Running mass dues billing

Mass billing enables you to process a billing cycle for all customers who match the parameters defined in the selected billing cycle. The system decides which customers to bill by comparing the Paid Thru dates to the renewal Effective Date. iMIS also decides what and how much to bill based on your settings. You can run a mass billing cycle to print

initial bills, first or second reminders, or run a billing cycle for all print options concurrently.

For example, you enter a Run Date of 9/26/2005 for all print options and the billing reminders that were set as:

- Initial Bill Cut Off = 3
- First Reminder Start = -2 and Cut Off = -1
- Second Reminder Start = -3 and Cut Off = -2

iMIS searches the database for customers who match the billing cycle parameters. An initial billing is generated for all customers who have a Paid Thru date before 12/01/2005 (applies to anniversary only). iMIS runs first reminders for unpaid customers whose initial billing was sent between 7/01/2005 and 8/01/2005 and second reminders for those who were initially billed between 6/01/2005 and 7/01/2005.

> **Note:** Caution! Before initial billing is run, print a test-billing run and verify the results.

To verify billing of new renewals

Initial billing is an important process within iMIS. It generates and updates a great deal of information in the customer (Name) and billing files. To avoid errors caused by incorrect settings and dates, follow these steps for every initial billing run:

1. Run a billing procedure report.

1. From Customers, select Generate reports to open the Generate reports window.
2. Select Rosters from the Report Types list.
3. Select Member Index with Additional User Fields from the Available Reports list.
4. Select Options > Additional Fields.
5. Add Name.PAID_THRU to the first field.

   Example ad hoc search comparison lines:

Name.PAID_THRU <= '12/31/2001'(one day before Effective Date)

Name.MEMBER_TYPE = M,CM (customer types included in billing cycle)

Name.STATUS begins with A (assuming inactive and suspended customers are not included in the billing cycle)

This should agree with the number of renewal notices that the mass billing procedure will generate. If billing on an anniversary basis, narrow down the Name.PAID_THRU date (for example, Name.PAID_THRU >= 12/01/2001 and Name.PAID_THRU <= 12/31/2001). The search criteria leave out one important field, Renewed Thru, which iMIS billing also considers in determining who needs billing. To get an accurate representation of the customers iMIS will bill, run a test on Renewed Thru. To do this, enter an ad hoc selection with a single calculation line. Enter a SQL statement similar to the following example in the Comparison Value Text area:

from Name, Name_Fin where Name_Fin.ID = Name.ID

and Name.PAID_THRU < '1/01/2002'

and Name_Fin.RENEWED_THRU < '1/01/2002'

and Name.MEMBER_TYPE in ('M','CM')

and Name.STATUS like 'A%'

If the results vary from the first report to the second, there may be a problem with the Name_Fin.RENEWED_THRU date. iMIS will assume the customer has already been billed.

2. Back up your iMIS data.
3. Run the billing.

   Note: Print the initial bills when you generate the billing renewal data. Be careful to use the correct Effective Date. You can override the Run Date if needed.
4. Verify the number of customers billed. Check the number of customers billed against your customer report.

5. (optional) Run the Open Items by Name report. The report's Begin Date and End Date should reflect the same Run Date as the renewal-billing run. This report will give you the count of customers billed.
6. Investigate discrepancies between the reports produced (who should be billed versus who was actually billed).

To run initial mass dues billings

> **Note:** Caution! If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

1. From Billing, select Process billing to open the Process billing window.
2. Click New.
3. Select the Renewals Billing Options. The default Effective Date field automatically displays. Select Renewals to process new renewals.
4. Select a billing cycle to process that was previously created in the Set up billing cycles window.
5. Select the Printing Options
6. (optional) Override the Run Date.
7. (optional) Override the Effective Date.
8. (optional) Select the Additional Options.
9. Click Run to process the billing run.

To rebill to correct a mass dues billing

iMIS provides a Rebill feature that enables you to correct a previous mass billing. Rebill a mass run if:

- The pricing table originally used for the renewal bill run was incorrect; or
- The original dues billing did not include a line item.

For example, rebill the sample initial dues bill discussed in To run initial mass dues billings.

> **Note:** Note: A renewal billing can be combined with a rebilling.

1. Correct the reason for the rebill.
2. From Billing, select Process billing to open the Process billing window.
3. Click New.
4. Select Rebill to change or correct a billing run generated previously.
5. Select a billing cycle to process.
6. Select the Printing Options.
7. Enter the original Run Date range in the Begin Rebill Date and End Rebill Date fields.
8. Click Run to process the billing run.

Running individual dues billing

This section explains how to process renewal and rebill billing cycles for an individual (frequently done when a new customer joins an organization). The process for running individual dues billings includes the following:

1. Select the customer for whom to process a renewal or rebill billing cycle
2. (optional) Add line items
3. Create an invoice
4. Process the billing run

To run individual dues renewal billing

1. From Customers, select Manage customers.
2. Find the customer's record.
3. Select the Billing tab.

4. (optional) Add line items. In billing, line items may need to be added if a customer has elected to:

- Join an optional section;
- Join a secondary chapter (other than the main chapter referenced on the Manage customers window); or
- Subscribe to an optional journal (assuming the billing cycle provides for the billing of such optional items).

   Note: In the case of a non-dues billing run, the line item to be billed must exist in order for the item to be billed.

5. Click New on the Billing tab. An empty Dues/Subscription Item Detail window opens.
6. Click New on the Dues/Subscription Item Detail window.
7. Enter the product code in the Item field or select the lookup icon to find an available value. For this example, a newsletter subscription has been added.
8. Click Save. The Dues/Subscription Item Detail window closes and the new subscription item is inserted as a new billing item on the Billing tab.

   Note: When this customer is billed, the new subscription item will be added to the invoice.

9. Click Create Invoice. The Dues Billing Selections window opens.
10. Click New.
11. Select a billing cycle to process.
12. Select Renewals to generate a new billing.
13. Select the Printing Options. In most cases, when generating a new bill you should select Initial Bill when Renewals is selected.
14. (optional) Override the Run Date.
15. (optional) Override the Effective Date.

16. (optional) Select Additional Options.
17. Click Run to process the billing run.

    For annual billing, the Paid Thru date will be the last day of the fiscal year. In the previous example, the customer is billed on an anniversary basis and the journal subscription on an annual basis.

Rebilling to correct an individual dues billing

iMIS provides a rebill feature that allows an additional invoice to be printed to correct the original invoice. Rebill an individual if any of the following apply:

- The pricing table originally used for the renewal bill run was incorrect; or
- Any of the following information on a customer's record has changed: Chapter code, Customer Type, a field that special pricing was based upon, or the customer's Renew Months (for example, billing term change).

  To rebill an individual dues billing

  In the following example, we rebill an individual. The billing cycle selected is based on billing individuals whose customer type is M.

  After you process the billing run, the Dues Billing Selections window closes and the line items that were billed to the individual automatically display on the Billing tab.

  In this example, iMIS determined the dues rate used to bill this individual by checking the rates defined in the following windows in the order shown.

  > **Note:** Note: Special pricing always overrides what is set in the Set up customer types window and Set up products window.

- First - Special Pricing - For Basic Dues, a special price of $50 has been set for customer type M, category 1 (M/1).
- Second - Set up customer types window - Our customer is classified as customer type M. The Set up customer types window contains a rate of $75 for Basic and a rate of $20 for

PAC.

- Third - Product Codes - The standard pricing for Basic was set to zero.

  Based on the rates set in these windows, iMIS will bill $50 for the Basic line item for this individual using the rates set in the Special Pricing window.

  To process and rebill Chapter changes

  Occasionally, a customer's chapter association will change (for example, if the customer moves or if a data entry error was made). To demonstrate this, we will change a customer's chapter affiliation and rebill the customer when the customer has an open dues balance.

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Status tab and select a different Chapter code.
4. Click Save.
5. Select the Billing tab.
6. Double-click the line item for the old chapter to open the Dues/Subscription Item Detail window.
7. Click Delete. A system message is displayed asking you to confirm the deletion.
8. Click Yes to delete the item record.
9. Note the Bill Date displayed on the existing open dues line items.
10. Click Create Invoice to open the Dues Billing Selections window.
11. Click New.
12. Select the billing cycle.
13. Select Rebill.
14. (optional) Select Initial Bill to print the Renewal Notice.

15. Enter the original Bill Date in the Begin Rebill Date and End Rebill Date fields.
16. (optional) Override the Run Date to agree with the original Bill Date so you can retain the bill's original timing for Reminder Notice printing.
17. Click Run.
18. Verify that the dues amount is calculated properly for the new chapter on the Billing tab.

    If you have a zero balance on a chapter dues item, and you change the chapter on the Manage customers window, the zero balance line item will be deleted and replaced with the new chapter item.

    To process and rebill customer type changes

    Occasionally, you may need to change the customer type for a particular customer (for example, if a customer changes types or if there was a data entry error).

1. From Customers, select Manage customers to open the Manage customers window.
2. Change the Member Type.
3. Click Save.
4. Select the Billing tab.
5. (Recommended) If different dues products are linked to the Set up customer types window for the new customer type, use the following steps to delete the dues item(s) that were billed under the old customer type.

   Note: If the customer will continue to receive any non-dues items such as subscriptions or optional items, do not delete these items. Delete only the customer type items that are not included for the new customer type.

1. Double-click the line item to be deleted.
2. Click Delete.

   Note: Subscription or dues items with payments should not be deleted. The best practice is to set the status to I.

6. Select the Financial tab.
7. Delete the Renewed Thru date.
8. Click Save.
9. Take note of the Bill Date displayed for the open dues line item on the Dues Subscription window.
10. Click Create Invoice to open the Dues Billing Selections window.
11. Select the correct billing cycle.
12. Select both the Renewals and Rebill options under the Billing Options area.
13. (optional) Select Initial Bill to print the Renewal Notice.
14. Enter the original Bill Date in the Begin Rebill Date and End Rebill Date fields.
15. (optional) Override the Run Date to the original Bill Date to retain the bill's original timing for Reminder Notice printing.
16. Click Run.
17. Verify that the main dues amount is calculated properly for the new customer type on the Billing tab.

Printing reminder notices

Reminder Notices can be run at the same time you print Renewal Notices, or you can print them separately.

When you print a reminder notice, the following field conditions are evaluated to determine if a reminder notice will print for a customer.

First reminder

Prints an initial reminder notice for customers with outstanding balances when the following conditions exist:

- The Paid Thru field on the Status tab (Name.PAID_THRU) contains a date that is earlier than the date on the Renewed Thru field on the Financial tab (Name.Fin.RENEWED_THRU) located on the Manage customers window (from Customers, select Manage customers).
- The Status field (Name.STATUS) on the Manage customers window is not set to S (Suspended), I (Inactive), or D (Marked for deletion).
- The balance for the Subscriptions record (Subscriptions.BALANCE) is greater than zero.
- Subscriptions.REMINDER_COUNT is equal to 1
- The Bill Date (Subscriptions.BILL_DATE) is between the 1st Reminder Start and 1st Reminder End dates on the Process billing window.

  Second reminder

  Prints a secondary reminder notice for customers with outstanding balances when the following conditions exist:

- The Paid Thru date on the Status tab (Name.PAID_THRU) contains a date that is earlier than the Renewed Thru field on the Financial tab (Name.Find.RENEWED_THRU) located on the Manage customers window.
- The Status field (Name.STATUS) on the Manage customers window is not set to S (Suspended), I (Inactive), or D (Marked for deletion).
- The balance for the Subscriptions record (Subscriptions.BALANCE) is greater than zero.
- Subscriptions.REMINDER_COUNT is equal to 2.
- The Bill Date (Subscriptions.BILL_DATE) is between the 2nd Reminder Start and 2nd Reminder End dates on the Process billing window.

  To print reminder notices

  Note: Note: Do not check either box in the Billing Options area.

1. From Billing, select Process billing to open the Process billing window.

2. Click New.
3. Select the billing cycle to process.
4. Select the Printing Options.
5. (optional) Override the Run Date.
6. (optional) Select Additional Options.
7. Select your report destination.
8. Click Run to print the reminder notices.

Generating mass billing data

For a dues billing run

When the Renewal billing option is selected on a new mass dues billing, the following decisions are made to determine who gets billed and what gets billed.

Who gets billed

Customers who meet the following requirements:

- Meet the customer type and billing category selection requirements of the selected billing cycle.
- Have an Active status that begins with the A, or have an Inactive status that begins with the letter I, or have a Suspended status that begins with the letter S. Inactive and suspended customers will be billed only if the Include options have been selected for the billing cycle.
- Have an overall customer term Paid Thru date before the Effective Date on the Dues Billing Selections window.
- Have an overall customer term Renewed Thru date before the Effective Date on the Dues Billing Selections window.
- If specified, have a main Chapter Code on the Manage customers window that matches the chapter under the Additional Options - Process a Chapter selection on the Dues

Billing Selections window.

- Have data elements that pass the test of the specified Ad Hoc Search under Additional Options on the Dues Billing Selections window (if selected).

  What gets billed

  Line items that meet the following requirements:

- Are cross-referenced on the Set up customer types window.
- Are not cross-referenced on the Set up customer types window, but have an active status and are included, either directly or indirectly (for example, by type), in the billing cycle's list of products.

  Note: For a dues billing run where the Add Member Type Items option has been enabled, the Paid Thru and Billed Thru dates of the individual lines items are ignored.

  Note: If an individual line item has a different Paid Thru date than that of the overall customer but is included in the dues billing cycle, the new billed term forces that line item to be resynchronized to match that of the overall customer term date status.

For a non-dues billing run

While data for customers of non-dues products must match the criteria as outlined in the following “Who Gets Billed” section, only customers who have one or more line items that meet the billing criteria will be billed.

Who gets billed

Customers of non-dues products who meet the following criteria:

- Meet the customer type and billing category selection requirements of the selected billing cycle.
- Have an Active status that begins with the letter A, have an Inactive status that begins with the letter I, or have a Suspended status that begins with the letter S. Inactive and suspended customers will be billed only if the Include options have been selected for the billing cycle.

- Have a main Chapter code on the Manage customers window that matches the chapter (if specified) under Additional Options - Process a Chapter on the Dues Billing Selections window.
- Have data elements that pass the test of the specified Ad Hoc Search under Additional Options on the Dues Billing Selections window (if selected).
- Have at least one billable line item that meets the criteria in the list of items to be billed.

  What gets billed

  Line items that meet the following criteria:

- Already exists in the customer's list of product line items (for example, items displayed on the top half of the Billing tab).
- Are included, either directly or indirectly, in the billing cycle's list of products.
- Have an Active status or, in the case of a section-type product, have an Inactive status.
- Have an individual non-dues product Paid Thru date before the Effective Date on the Dues Billing Selections window.
- Have an individual non-dues product Billed Thru date before the Effective Date on the Dues Billing Selections window.

For a dues rebilling run

When the Rebill billing option is selected on a mass dues rebilling run, the criteria for who gets billed is the same as the requirements for the initial billing run, except that the Renewed Thru date should be in advance of the Effective Date. The original billing date of the main dues product (the product that is listed first on the Set up customer types window) must fall within the specified rebill date range.

Who gets billed

Customers who meet the following criteria:

- Meet the customer type and billing category selection requirements of the selected billing cycle.

- Have an Active status that begins with the letter A, have an Inactive status that begins with the letter I, or have a Suspended status that begins with the letter. Inactive and suspended customers will be billed only if the Include options have been selected for the billing cycle.
- Have an overall customer term Paid Thru date before the Effective Date on the Process billing window.
- Have a main Chapter code on the Manage customers window that matches the chapter (if specified) under Additional Options - Process a Chapter on the Dues Billing Selections window.
- Have data elements that pass the test of the specified Ad Hoc Search under Additional Options on the Process billing window (if selected).
- Have an overall customer term Renewed Thru date in advance of the Effective Date on the Process billing window.
- Have an active line item whose product code matches that of the first cross-referenced item on the associated Set up customer types window and has an original bill date within the Begin Rebill and End Rebill Date range, inclusive.

  What gets billed

  Line items that meet the following criteria:

- Are cross-referenced on the Set up customer types window.
- Are not cross-referenced on the Set up customer types window, but have an active status and are included, either directly or indirectly (for example, by type), in the billing cycle's list of products.

For a non-dues rebilling run

Who gets billed

Customers of non-dues products who meet the following criteria:

- Meet the customer type and billing category selection requirements of the selected billing cycle.
- Have an Active status that begins with the letter A, have an Inactive status that begins with the letter I, or have a Suspended status that begins with the letter S. Inactive and suspended customers will be billed only if the Include options have been selected for the billing cycle.
- Have a main Chapter code on the Manage customers window that matches the chapter (if specified) under Additional Options - Process a Chapter on the Dues Billing Selections window.
- Have data elements that pass the test of the specified Ad Hoc Search under Additional Options of the Dues Billing Selections window (if selected).
- Have at least one rebillable line item that meets the criteria in the following list.

  What gets billed

  Line items that meet the following criteria:

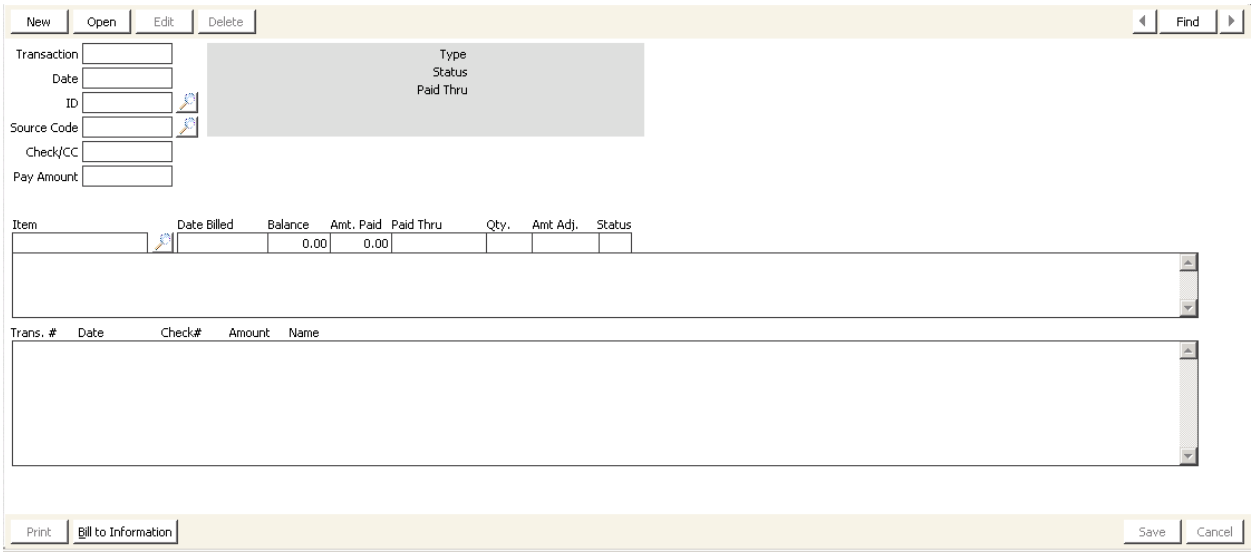
- Exist in the customer's list of product line items (for example, items displayed on the Billing tab).
- Are included, either directly or indirectly, in the billing cycle's list of products.
- Have an Active status or, in the case of a section type product, have an Inactive status.
- Have an individual non-dues product Paid Thru date before the Effective Date on the Dues Billing Selections window.
- Have an individual non-dues product Billed Thru date later than the Effective Date on the Dues Billing Selections window.
- Have an original Run Date within the Begin Rebill Date and End Rebill Date range, inclusive.

Cash Dues Payments

As you enter a payment, iMIS automatically completes the following tasks:

- Updates the product open item (if any)
- Moves the Paid Thru date forward by a preset period (when paid in full)
- Creates the proper activity/history records

Enter and edit payments window



Admin Console: Home > Customer Service > Enter and edit payments
Desktop: Billing > Enter and edit payments

Transaction

When you complete a payment transaction, iMIS assigns a sequential number in this field. This field cannot be changed.

Date

The transaction date defaults to the current system date and can be overwritten. If Batch Control is used, this date defaults to the batch date and cannot be overwritten.

Id

Specifies a customer ID or select the lookup icon to select a value.

Source Code

Specifies a user-defined code, often used for marketing purposes, or select the lookup icon to select a value. Validates from the SOURCE_CODE table and is required if the Force Source Coding option is enabled on the Customer Setup - Basic Options window.

Check/CC

Specifies the payment's check number or credit/debit card abbreviation (for example, VISA, MC, DISC, or AMEX). To enter a credit/debit card payment, the credit/debit card code must be defined on the Set up cash accounts window. When a credit/debit card code is entered, iMIS displays the following additional fields where you can enter specific card information.

- CC # - Enter the credit/debit card number.

  Note: For credit cards only, if you enter the credit card number incorrectly, a message is displayed informing you that the credit card did not pass validation and asking you if you want to override the validation check. Make sure to reenter the card number correctly.

- CSC - (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code (CSC). You can make the CSC a required value for specific credit/debit card cash accounts.
- Exp - Enter the card's expiration date (mm/yy).
- Authorize - Enter any authorization code here.
- Name on CC - Enter the name as it appears on the card.
- Issue # - (Displays only when the associated cash account accepts an issue number) Enter the European debit card's issue number.
- Issue Date - (Displays only when the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).

> **Note:** Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Pay Amount

Specifies the amount paid. The payment amount is applied automatically to each open line item, beginning with the main customer dues.

Total Balance

This field is automatically populated with the outstanding balance for all product items.

Item

Specifies a line item, or click the lookup icon to select a value. To enter a new line item, highlight a new line and enter the new product.

Date Billed

This field is automatically populated with the date the line item was billed.

Balance

This field is automatically populated with the outstanding balance for the line item.

Amt Paid

Displays the payment amount for the line item selected. You can also use this field to manually override amount paid for an individual line item.

Paid Thru

Specifies the date through which payments have been applied for the line item. As full payment is applied to a line item, the Paid Thru date field advances to the end of the bill term or beyond.

Qty

Specifies the number of the line items purchased.

Amt Adj

Specifies the dollar amount to be adjusted from this line item.

Status

(Defaults to current status) Specifies the product's billing status. The status code field relates to whether the subscription line item is active or inactive. This field determines if this product will be billed again, but does not relate to the Amt Adj field.

Updated information list

Displays the Trans #, Date, Check#, Amount, and Name fields.

New Bill From

(Displays when processing bills for new customers) This option works the same way as the Effective Date on the Process billing window. If billing is based on an annual schedule, the New Bill From date must be set to the first day of the first month of the annual term even if the customer has a Join Date subsequent to that date. (For example, if the annual term starts on 01/01/2001 and the customer joined 07/15/2001, the New Bill From date must be 01/01/2001.)

For anniversary billing, the date is set to the first day of the month in which you are processing the billing payment or to the value entered on the Advance Start Month as of field.

Bill New Mem Type Items

(Displays when processing bills for new customers) Enable to automatically select all Dues products that are listed in the Set up customer types window for that customer type.

Bill to Information

Opens the Bill to Information window where you can enter the Bill to ID, as well as the name and address of the entity being billed.

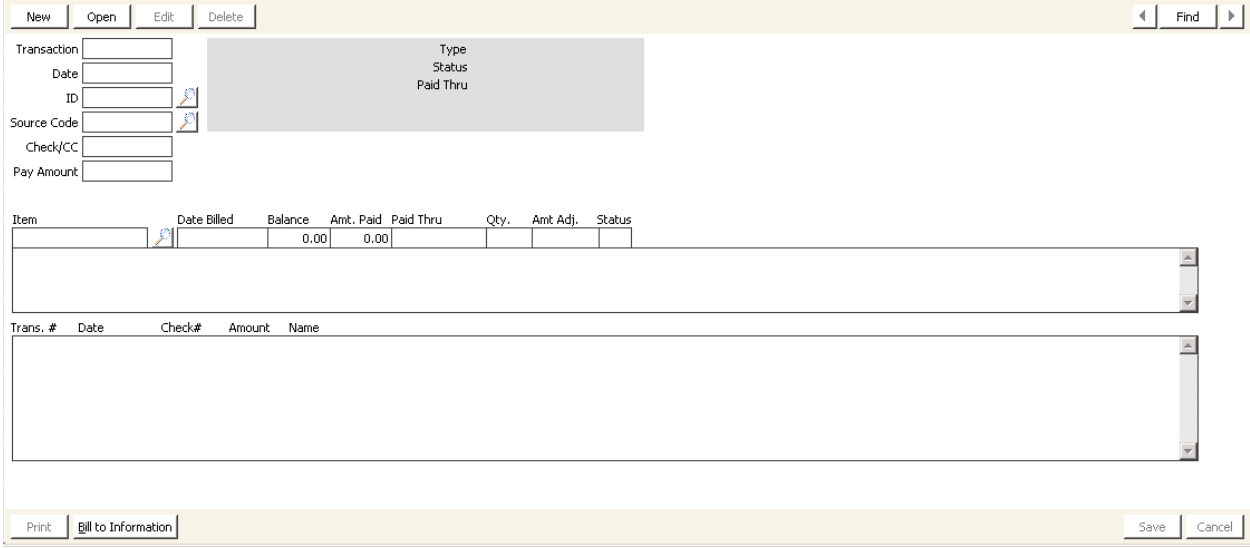
Bill New

Automatically generates and displays billing data for the line item. (Is displayed when the main dues product has never been billed or a new line item is added)

Entering a full payment

You can apply full payments to the open balance line items in product payment priority order.

Enter and edit payments window



Admin Console: Home > Customer Service > Enter and edit payments
Desktop: Billing > Enter and edit payments

To enter a billing payment

1. From Enter and edit payments window, click New.
2. (optional) Override the Transaction Date, if necessary.
3. Enter the customer ID. If you do not know the customer ID, select the lookup icon in the ID field to look up the customer in the database. The window displays any line items associated with the customer ID and the total outstanding balance.
4. Enter the Source Code that prompted this payment and press Tab.

5. Enter the check number or credit/debit card code and press Tab. For credit/debit cards, enter the required card information.
6. Enter the amount of the payment in the Pay Amount field and press Tab.

   The payment amount is applied automatically to each open line item, beginning with the main customer dues product. As full payment is applied to a line item, the Paid Thru date field advances to the end of the bill term or beyond.

   Note: Complimentary or zero dollar items can be denoted by an asterisk (*) on the Enter and edit payments window. The Paid Thru date advancement for complimentary billing items billed through Create Invoice follows the rule established by the billing cycle that is selected on the Process billing window. To update the Paid Thru date for zero dollar items, double-click the line item.
7. Click Save. Verify that the payment information is updated on the Billing tab.

   To apply payment to a different line item

   The Enter and edit payments window automatically applies the lump sum amount paid to the open balance line items in product payment priority order. Occasionally, the payment may need to be applied to line items other than the ones the payment window automatically selects. To apply a dues payment to a different line item, perform the following:

1. From Billing, select Enter and edit payments to open the Enter and edit payments window.
2. Click New.
3. Enter the customer ID and press Tab.
4. Enter the payment information. The payment amount is applied automatically to the open (positive) line items according to the payment priority rankings assigned to each product code (from lowest to highest). In the following example, iMIS applied $20 to the Journal Subscription.
5. Double-click the line item to remove the amount paid (in this example, the Journal Subscription line item). You can manually override the amount applied to a line item by

selecting the line and entering the desired amount in the Amt Paid field.

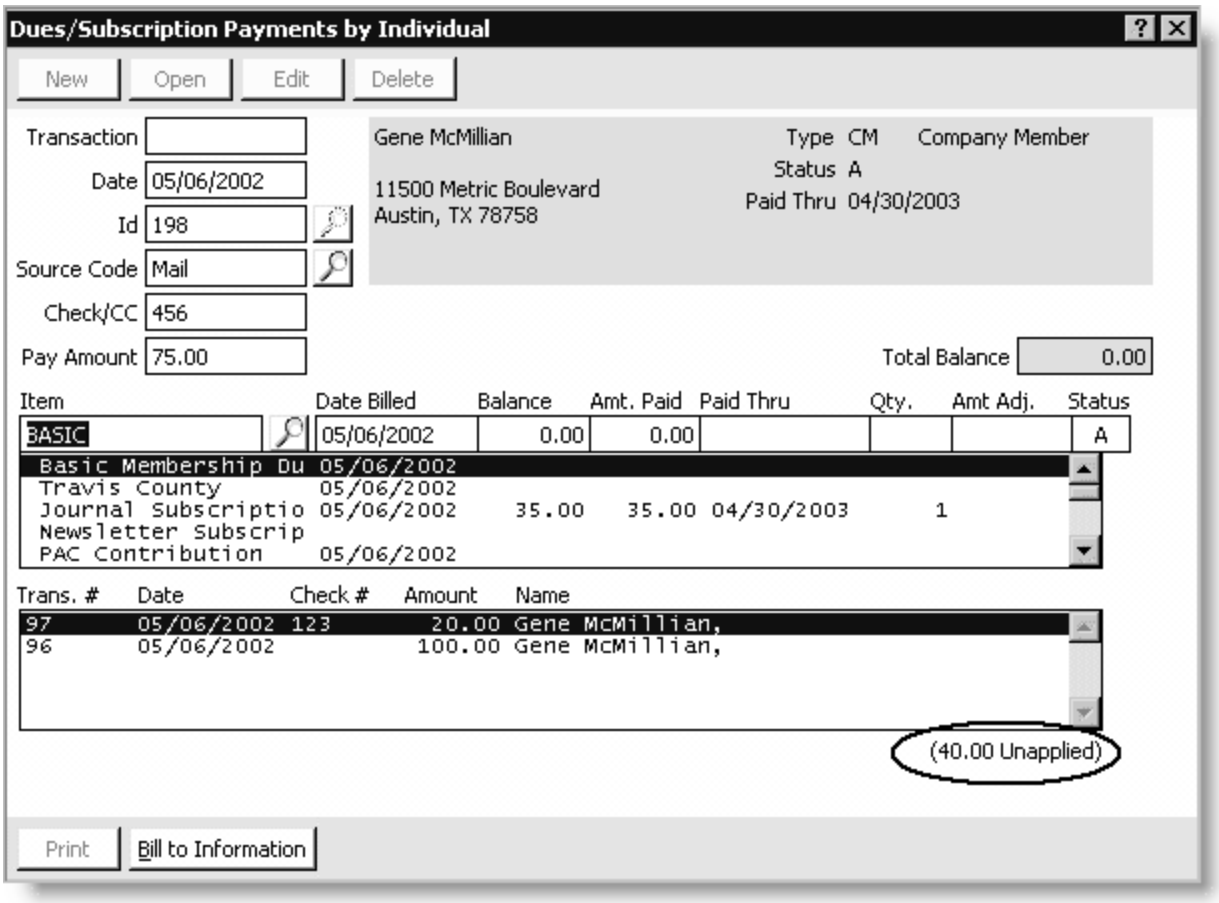
6. Double-click the line item where the payment should be applied (for example, PAC Contribution).
7. Click Save.

Entering an overpayment

Overpayments can be processed in one of three ways:

- Transfer open credit to AR/Cash so you can refund the overpayment or apply the credit to current or future sales items
- Apply overpayment to offset next year's dues by using AVAIL_CREDIT
- Apply overpayment to another product credit by using _CREDIT

If an overpayment for dues is received, process the payment as described in To enter a billing payment. Enter the amount of the actual payment in the Pay Amount field. The amount that is needed to pay the dues items (for example, the remaining balance) will be applied. The overpayment amount (amount not applied) displays in parentheses at the bottom of the window.



Dues/Subscription Payments by Individual window showing overpayment

To transfer open credit to AR/Cash

If you transfer an open credit to AR/Cash, you can refund the over-payment or apply the credit to current or future sales items (such as an order or an event registration).

> **Note:** Note: You cannot create an open AR credit unless the Cash Dues Over-/Under Payments Create AR option is selected on the Set up general options window.

1. From Billing, select Enter and edit payments to open the Enter and edit payments window.
2. Click New.
3. Tab to the ID field and enter the customer ID, or click the lookup icon to select a value.

4. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
5. Enter the check number or credit/debit card code in the Check/CC field, and press Tab. For credit/debit cards, enter the required card information.
6. Enter the amount of the actual payment in the Pay Amount field. The amount needed to pay the billing items (for example, the remaining balance) is applied. The amount of the overpayment (amount not applied) displays in parentheses at the bottom of the window.
7. Click Save. A system message is displayed asking you to confirm the creation of an AR item for the overpayment.
8. Click Yes. This overpayment can be refunded on the Credit Invoices window (from AR/Cash, select Process month-end procedures, and click Credit Invoices), or applied to other open balances such as meeting registrations or orders by using the *TAB feature.

To apply overpayment to offset next year's billing

Overpayments can be applied to a special credit product by using the _CREDIT product code. The _CREDIT product code retains credit balances and prints the billed amounts and credits separately.

1. Set up a credit product. The following steps are required to process credits that print as separate line items on subsequent bills:

1. Insert a product code that ends in _CREDIT on the Set up products window (from Billing, select Set up module > Products). Do not use AVAIL_CREDIT.
2. Select the credit product on the scrolling list on the Set up billing cycles window (from Billing, select Set up module > Billing cycles) so it will print on the renewal notice when an overpayment balance exists for a renewing customer.
3. Enable the Maintain Prev Balance option on the Set up general options window (from Billing, select Set up modules > General)

Note: If your billing cycle sort method is by product rank, assign a large number to the credit product if you want the credit listed at the bottom of the line items.

2. From Billing, select Enter and edit payments to open the Enter and edit payments window.
3. Click New.
4. Tab to the ID field and enter the customer ID, and press Tab.
5. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
6. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
7. Enter the amount of the actual payment in the Pay Amount field. The amount that is needed to pay the dues items (for example, the remaining balance) will be applied. The amount of the overpayment (amount not applied) displays in parentheses at the bottom of the window.
8. Apply the overpayment to the special credit product code. For this example, we have inserted a product code of BILLING_CREDIT.

1. Select the empty space immediately below the last line item displayed.
2. Select the Item field.
3. Enter the product code for the special credit line (for example, BILLING_CREDIT), or select the lookup icon and double-click the DUES_CREDIT product code.
4. Tab to the Amt Paid field and enter the overpayment.
5. Click Save.

   The overpayment credit should appear as a separate, negative line item on the next bill generated for this customer. Credit line items must then be offset against positive line items manually on the Enter and edit payments window. If the overall balance of the bill is positive, this manual offset process can occur when the payment is received and entered.

Entering a partial payment

Underpayments can be processed in one of three ways:

- By leaving underpayment balances in Billing;
- By transferring underpayment balances to AR; or
- By adjusting residual balances.

> **Note:** Note:
>
> If Maintain Prev. Balance was selected on the Set up general options window, you can leave underpayments in Billing or you can adjust the balance.
>
> If the Cash Dues Over/Under Payments Create AR option was selected on the Set up general options window, you can transfer underpayment balances to AR.
>
> If both of these options are selected, the underpayment balances can be transferred to AR, left in Billing, or you can adjust the balance.
>
> To leave underpayment balances in Billing
>
> If a partial payment is received, the unpaid balance appears in the Total Balance field, the Paid Thru date is not advanced, and the residual balance continues to be tracked as an open item in the Billing module. Since the Paid Thru date is not advanced, the remaining balance will print on subsequent Reminder Notices until full payment is received.

> **Note:** Note: The remaining balances that print on Reminder Notices for billings with partial payments do not include VOL products.

1. From Billing, select Enter and edit payments. The Enter and edit payments window opens.
2. Click New.
3. Tab to the ID field and enter the customer ID.
4. Press Tab.
5. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.

6. Enter the amount of the actual payment in the Pay Amount field. iMIS automatically applies the amount paid to the open line items until the amount paid has been fully applied. In the following example, the balance due was $115 and we entered a $50 payment.
7. Click Save.

To transfer underpayment balances to AR

Use the following steps to enter a partial payment, transfer the underpayment balance to AR, and show dues as paid in full.

1. From Billing, select Enter and edit payments. The Enter and edit payments window opens.
2. Click New.
3. Tab to the ID field and enter the customer ID, and press Tab.
4. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
5. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
6. Enter the amount of the actual payment in the Pay Amount field. In the following example, the balance due was $95 and we entered a single payment of $55.
7. Select each line item and enter the full amount due in the Amt Paid field.

   As you override the Amt Paid, the difference between the payment entered and the amount applied displays as over applied at the bottom of the window.
8. Click Save. A message is displayed asking you to confirm the creation of an AR item for the over applied payment.
9. Click Yes.

   The remaining balance transfers to AR/Cash as an open receivable. The balance will appear on the AR statements instead of future Dues Billing Reminder Notices.

To adjust residual balances

In certain cases, you may want to write off or reduce the residual balance left from an underpayment, particularly if the remaining balance is insignificant. You also may want to use the adjustment method to officially record decisions to award a post-billing discount for a line item.

> **Note:** Note: Entering this adjustment makes no credit or debit entries into any accounts, including the write-off account.

1. From Billing, select Enter and edit payments. The Enter and edit payments window opens.
2. Click New.
3. Tab to the ID field and enter the customer ID, and press Tab.
4. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
5. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
6. Enter the amount of the actual payment in the Pay Amount field. In the following example, the balance was $75 and the payment was $60.
7. Select the line item for which the Amt Paid (applied) is less than the balance.
8. Enter the positive difference between the Balance and Amt Paid in the Amt Adj field.
9. Click Save.

   Note: An activity tracking record will be generated even when no payment is applied (for example, when a full complimentary discount is being applied).

Combining billing and payment for a new customer

The Bill New button generates billing data and records payment received with a single window procedure. This option appears when the main Billing product has never been

billed or a new item has been added. This feature is helpful when processing bills for new customers who send payment along with their applications and for new prepaid subscriptions. The Bill New Member Type Items option should not be enabled when billing new independent subscription items.

To process billing for new customers

1. From Customers, select Manage customers to open the Manage customers window.
2. Click New to add information for a new customer. Typically, the normal customer data includes the Member Type, the billing Category (if applicable), and the Join Date. Leave the Paid Through Date blank.
3. Click Save.

   Caution! When you process a billing run for a new customer through the Enter and edit payments window, only the products defined on the Set up customer types window display on the Enter and edit payments window; iMIS ignores the billing cycles and any optional items, such as chapters. If your billing cycle includes Other Billing Instructions options, such as Include all chapters, you need to generate your billing using Create Invoice.
4. Select the Billing tab.
5. Click Payment to open the Dues/Subscription Payments by Individual window.
6. Click New. The Dues/Subscriptions Payments by Individual window is populated with products to be billed to the customer from the Set up customer types window.
7. Enable the Bill New Mem Type Items option (if not already selected).

   Note: The Bill New Mem Type Items options should not be selected when billing for new independent subscription products.
8. Verify that the New Bill From date is accurate. The New Bill From date works the same way as the Effective Date on the Process billing window.

   Note: If billing is done annually, the New Bill From date must be set to the first day of the first month of the annual term, even if the customer has a Join Date after that date. For

example, if the annual term starts on January 1, 2001 and the customer joined July 13, 2001, the New Bill From date must be 01/01/2001. If this is an anniversary term, the New Bill From field is typically set to the first day of the month in which you are processing the dues payment.

9. Click Bill New. The amount due for each product displays automatically in the Balance column on the Dues/Subscription Payments by Individual window.
10. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
11. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
12. Press Tab.
13. Enter the amount of the payment in the Pay Amount field and press Tab.

    The payment amount is automatically posted to each open line item, beginning with the main customer dues. If full payment is received, the Paid Thru date advances to the end of the billed term.

    Note: Complimentary or zero dollar items are denoted by an asterisk (*) on the Enter and edit payments window. The Paid Thru date advancement for complimentary products billed through Bill New follows the default rule established on the Set up general options window (from Billing, select Set up module > General options). To update the Paid Thru date for zero dollar items, double-click the line item.
14. Click Save.

    To process new prepaid subscriptions

    To combine billing and payment entry for a new subscription product, you must enter the new line item, generate the balance, and apply the payment.

1. From Billing, select Enter and edit payments to open the Enter and edit payments window.

2. Click New.
3. Enter in the customer number in the ID field and press Tab.
4. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
5. Select the empty space immediately below the last line item displayed.
6. Select the Item field.
7. Enter the product code of the item being billed and paid, or select the lookup icon and double-click the product code.
8. Repeat this process if multiple items are being billed and paid.

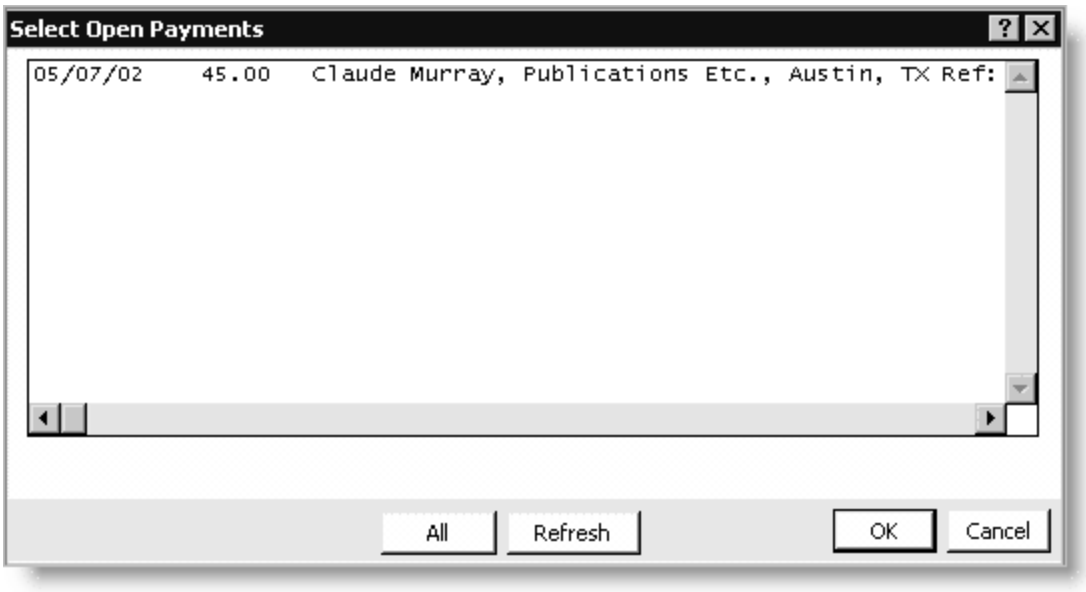
   Note: When a new line item is added, new billing options appear on the bottom of the Enter and edit payments window.
9. Verify that the Bill New Mem Type Items option is not selected.
10. Verify that the New Bill From date is accurate.

    Note: The New Bill From date works the same way as the Effective Date on the Process billing window. The Billing general setup Billing Time setting (annual or anniversary) is used with the New Bill From date to determine the billing term.
11. Click Bill New.
12. Enter the check number or credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information.
13. Enter the amount of the payment in the Pay Amount field. The payment amount is applied automatically to the newly billed line item(s). If full payment is received, the Paid Thru date advances to the end of the billed term.
14. Click Save.

Using open credit balances as payment (*Tab)

The *Tab command sequence, when entered in the Check/CC field on the Dues/Subscription Payments by Individual or Enter and edit payments window, allows the application of open credit balances as payment for additional items through the Select Open Payments window.

The Select Open Payments window displays a list of open credits that can be applied as payment to an individual customer's account.



Select Open Payments window showing all open credits for individual

Use the scroll bar at the bottom of the window to view the batch number, the amount of the credit, company name, city and state, the reference number of the credit transaction, and the system through which it was generated. In addition, the All and Indiv buttons are available on these windows to toggle between the individual customer's available credit and all open credits currently in AR. Open credits may be applied to any other customers' accounts by selecting an item in the “All” view. To return to the individual customer's open payments, select the Indiv option.

To apply an open credit, simply double-click the appropriate line and enter the payment amount you wish to apply. It can be all or part of the amount of the credit. If you attempt to

apply a payment amount that exceeds the amount of the credit, a message is displayed asking you to confirm the creation of an AR item for the overpayment. After the payment is applied, the Trans.INVOICE_REFERENCE_NUMBER will be the same for both the customer whom the credit came from, and the customer to whose account the credit was applied.

To select open credits to apply as payments

1. From Billing, select Enter and edit payments. The Enter and edit payments window opens.
2. Click New.
3. Tab to the ID field and enter the customer's ID or select the lookup icon to select an ID and press Tab.
4. Enter the code for the marketing program or contact type that prompted this payment in the Source Code field.
5. Enter an asterisk (*) in the Check/CC field and press Tab. The Select Open Payments window opens and displays a list of open credits for that individual that can be applied as payments.
6. Select an open credit by double-clicking the payment you wish to apply.
7. (optional) Click All if you wish to select an open credit from another account to apply to this customer's account.
8. Enter the amount in the Pay Amount field and press Tab.
9. Click Save.

Overriding the Paid Thru date

The Paid Thru date will advance to the end of the billed term (normally a year) if a line item is paid in full. The Paid Thru date can be manually overridden.

> **Note:** Caution! If the overwritten Paid Thru date is less than the calculated default Paid Thru date, manually backdate or blank out the related Renewed Thru date (dues payment) or the subscription Billed Thru date (non-dues payment). This step helps the next billing for this customer or subscriber run smoothly.
>
> For example, suppose iMIS projected the Paid Thru date and Renewed Thru date to be 8/31/2001, but the Paid Thru date was changed at payment time to 6/30/2001. The Renewed Thru date, unless manually changed to the new Paid Thru date or blanked out, would prevent the customer from being billed on a renewal run for those customers expiring in June 2001. Instead, the customer would be renewed two months late.

To edit the Renewed Thru date for a customer

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Financial tab.
4. Change the Renewed Thru date.
5. Click Save.

Note: It is not necessary to edit the individual line items' Billed Thru dates for a dues product billing payment.

To edit the Billed Thru date for a subscription payment

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Billing tab.
4. Double-click the line item to be changed to open the Dues/Subscription Item Detail window
5. Click Edit.

6. Change the Thru date in the Last Billed section of the window.
7. Click Save.

   Note: If the customer has elected to change to an alternate term (other than the one billed) at payment time, change the individual's Renew Months (on the Financial tab) or the subscription Billing Period (only on a non-dues bill line item), and rebill before applying the payment. For example, a customer was billed for the default 12-month term, but elected to pay quarterly. You can edit the customer's Renew Months on the Financial tab and then rebill using the procedures outlined in Rebilling to Correct an Individual Dues Billing. The amount, the projected Paid Thru date, and the Renewed Thru date are recalculated appropriately.

Correcting cash billing payments

You cannot make corrections after the transaction has been sent to the general ledger.

To edit a billing payment entry

1. From Billing, select Enter and edit payments to open the Enter and edit payments window.
2. Click Find.
3. Search for the transaction by entering a value in the Transaction (number), Date, or ID field.
4. Click Save.

   Note: You might find multiple transactions if you search by the transaction date or ID. In this case, all possible transactions display in the scrolling list at the bottom of the window. To view the transaction, double-click it.
5. Click Edit.
6. Enter the changes. When the corrections are completed, click Save.

   Note: (optional) If you changed the Paid Thru date to a date earlier than the original posting, the Paid Thru date on the Dues/Subscription Payment by Individual window and the

subscription record will not change automatically. You must change these dates manually.

To delete a cash billing payment entry

1. From Billing, select Enter and edit payments to open the Enter and edit payments window.
2. Click Find.
3. Search for the transaction by entering a value in the Transaction (number), Date, or ID field.
4. You might find multiple transactions if you search by the transaction date or ID. In this case, all possible transactions display in the scrolling list at the bottom of the window. To view the transaction, double-click it.
5. Click Save.
6. Click Delete. A message is displayed asking you to confirm the deletion.
7. Click Yes to delete the transaction or No to cancel the deletion.

Note: (required) If a Paid Thru date exists on the deleted transaction (for example, not a partial payment), you must manually backdate the Paid Thru date.

Reversing and canceling payment transactions

You can reverse a transaction if a bad check was used for payment or if it is too late to delete the transaction (for example, the transaction has been sent to the General Ledger). You can cancel a payment transaction if the membership or subscription must be terminated after payment was received but before the prepaid term has reached normal expiration, or if the payment was made to the wrong record.

To reverse a payment transaction

1. From Billing, select Enter and edit payments to open a blank Enter and edit payments window.

2. Click New.
3. Enter the ID number and press Tab.
4. Enter the check number or the credit/debit card type in the Check/CC field. For credit/debit cards, enter the required card information. In the case of a returned check, it may be useful to prefix the check number with a code such as RET.
5. Enter a negative amount in the Pay Amount field.
6. Select the line item.
7. Enter the negative amount in the Amt Paid field.
8. Click Save.

   Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any income recognized for this product during the GL Interface procedure.

   Although entering a payment reversal restores the open balance, iMIS does not backdate a Paid Thru date automatically after it has been advanced. You must manually reinstate the previous Paid Thru date.

   Note: In the case of a dues payment reversal, edit the Paid Thru date on the Manage customers window if the primary dues product was reversed.
9. Correct the Paid Thru date for each reversed line item:

1. Select the Billing tab.
2. Double-click the line item that was reversed to open the Dues/Subscription Item Detail window.
3. Click Edit.
4. Backdate the Paid Thru date to its correct value (for example, before the reversal period).
5. Click Save.

   To cancel a payment transaction

Canceling a payment transaction is similar to reversing a payment, except that only the income is reversed and it may include a full or partial payment. Because the payment is not also reversed, the cancellation process creates an outstanding credit in Accounts Receivable. This credit can be refunded or applied to other sales transactions at a later time.

> **Note:** Note: To process a cancellation with the following steps, the Cash Dues Over/Under Payments Create AR option must be enabled.

1. From Billing, select Enter and edit payments to open the Enter and edit payments window.
2. Click New.
3. Enter the ID number and press Tab.
4. Leave the Pay Amount field blank.
5. Select the line item to be canceled.
6. Enter the cancellation amount as a negative amount in the Amt Paid field.
7. Click Save. A message is displayed asking you to confirm the creation of the AR item.
8. Click Yes. The unapplied amount displayed at the bottom of the window generates a credit open item.

   Note: If your system is licensed for Deferred Income and the product being reversed is normally deferred, iMIS will automatically adjust the deferred income and any income recognized for this product during the GL Interface procedure.
9. From Customers, select Manage customers to open the Manage customers window.
10. Change the status of the customer or the subscription line item.

    In the case of a customer cancellation:

- Change the customer type to a non-customer type code or change the status to a code beginning with S (suspended) or I (Inactive).

For a non-dues billing-related subscription product:

1. Select the Billing tab.
2. Double-click the line item that was canceled to open the Dues/Subscription Item Detail window.
3. Click Edit.
4. Change the Status to I (inactive).
5. Click Save. The Dues/Subscription Item Detail window closes and the status for the journal displays as I in the Billing tab.

Basic Subscription Products

Managing subscriptions involves setting up subscriptions, including automatic, optional, and complimentary subscriptions to journals and other publications for customers. Optional subscriptions can also be added during the payment process. Subscription management also includes processing subscription cancellations after payment has been made.

Additional features such as generating labels and managing back issues are available in the Advanced Subscription module.

Creating subscription products

The first step in managing subscriptions is to define or create product codes on the Set up products window for each potential subscription-type product that will be billed.

Setting up subscriptions

To set up subscription orders, you have the option of setting up subscriptions, which are automatically billed depending upon the customer type, or optional subscriptions, which are billed during a non-dues product billing run. For example, subscriptions are often added to the BASIC customer type, and are automatically included in the dues billing run for that customer type.

To set up automatic subscriptions for dues billing

1. From Billing, select Set up module > Products to open the Set up products window.
2. Click New.
3. Enter SUB for the Product Type.
4. Enter a product Code (for example, JOUR for a journal subscription). The code entered should not contain any spaces or special characters other than an underscore.
5. Enter the product Title.
6. (optional) Enter a product Description.
7. (optional) Enter the G/L Account.
8. (optional) Enter the Pay Priority.
9. (optional) Enter the Deferred account number.
10. (optional) Select the Prorate rule from the drop-down list.
11. Click Save.
12. From Customers, select Set up module > Customer types to open the Set up customer types window.
13. Select a Customer Type.
14. Click Edit.
15. Tab to a blank Billing Codes field.
16. Enter the Billing Code that was set on the Set up products window.
17. Enable the Comp option if the dues item will be provided at no charge for this customer type; or enter pricing information in the Fixed Amount field.
18. (optional) Enable Bill Company if the parent company is to receive the bill for the customers of this customer type that are linked to it.
19. Click Save.

To set up optional subscriptions for non-dues product billing

1. From Billing, select Set up module > Products to open the Set up products window.
2. Click New.
3. Enter SUB for the Product Type.
4. Enter a product Code. The code entered should not contain any spaces or special characters other than an underscore.
5. Enter a product Title.
6. (optional) Enter a product Description.
7. Enter the Regular pricing.
8. (optional) Enter the Non-Member pricing information.
9. (optional) Enter the G/L Account.
10. (optional) Enter the Pay Priority.
11. (optional) Enter the Deferred account number.
12. (optional) Select the Prorate rule from the drop-down list.
13. (optional) Click Special Pricing to enter the special pricing information.
14. Click Save.

To add optional subscription orders for non-dues product billing

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer requesting the subscription.
3. Select the Billing tab.
4. Click New to open the Dues/Subscription Item Detail window.
5. Enter the subscription code in the Item field or select the lookup icon to select the code.
6. Enter the Date Added.

Note: A non-dues item such as a subscription produce uses the Date Added field to calculate the period for the subscription rather than the Begin Date field.

7. Click Save to return to the Billing tab.

To set up complimentary subscription products

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer requesting the subscription.
3. Select the Billing tab.
4. Click New to open the Dues/Subscription Item Detail window.
5. Click New.
6. Enter the subscription code in the Item field or click the lookup icon to select the code.
7. Select Complimentary.
8. Enter the Date Added.
9. Click Save.

To create non-customer subscriber types

1. From Customers, select Set up module > Customer types.
2. Click New.
3. Enter SUB as the customer type. Do not enable the Is a Member option.
4. Enter a Description (for example, Subscriber Only)
5. Click Save.

Running a non-dues billing cycle for a subscription product

After the product is added to the Billing tab, it can be billed. The Billing Cycle does not add records for a customer; it only bills the records that have previously been added.

> **Note:** Note: Once the product is added to the customer's billing tab, you still need to bill the customer for the product. Refer to the sections Running mass dues billing or Running individual dues billing.

To set up a non-dues subscription billing cycle

1. From Billing, select Set up module > Billing cycles to open the Set up billing cycles window.
2. Click New.
3. Enter the Cycle Name for your subscription billing.
4. Select a form from the Forms drop-down list.
5. Select the Member Types to bill.
6. Select the Categories to bill.
7. Select the SUB item for the subscription in the Products list.
8. Click Save.

To add subscriptions during dues payments

1. From Billing, select Enter and edit payments. The Enter and edit payments window opens.
2. Click New.
3. Enter the ID, or select the lookup icon to select a value.
4. Select the first empty line in the list of billing items.
5. Enter the subscription product code in the Item field.
6. Enter the Amt Paid and Paid Thru Date.
7. Click Save.

Processing subscription cancellations after payment

Cancellations should be processed with the appropriate beginning period and term. The cancellation term usually coincides with the term of the corresponding income transaction, or at least the portion of the term that is being canceled.

In order to process cancellations, the Cash Dues Over/Under Payments Create AR option must be enabled on the Set up general options window.

Verify that the Period (BILL_BEGIN) and Thru (BILL_THRU) dates on the Dues/Subscription Item Detail window match the term of the dues/subscription to be canceled.

If the cancellation corresponds directly to the full term of the subscription most recently paid (cash basis), these Last Billed dates are correct. However, if the cancellation applies a partial refund to an active subscription term, manually adjust the Period to the first month of the cancellation.

Example: Cancel subscription product

Mary: think this is a hands-on that didn't get moved out of the UG/Help.

The following example illustrates a scenario where the customer requests a partial cancellation/refund for a journal subscription at the halfway point (July) of a 12-month subscription that originally ran from January through December.

1. From Customers, select Manage customers to open the Manage customers window.
2. Find a customer's record.
3. Select the Billing tab.

   Note: To open this window with data, you must have performed some type of billing transaction first.
4. Double-click a line item to open the Dues/Subscriptions Item Detail window.
5. Click Edit.

6. If a full cancellation is requested, do not make any changes here. However, if you need to implement a partial cancellation with a refund, change the Period field to the desired date (for example, 7/01/2001) for the beginning of the cancellation.
7. Click Save.
8. Click Payment to open the Dues/Subscription Payments By Individual window.
9. Click New to begin recording the cancellation.

To record the cancellation amount

1. Leave the Check/CC and Pay Amount fields blank unless you are recording a returned check or credit card cancellation.
2. Select the line to be canceled and enter the cancellation amount as negative (-65.00) in the Amt Paid field.
3. Tab to the Amt Adj field, and enter the cancellation amount as positive (65.00) to prevent the subscription line from having a positive balance in the end.
4. Click Save. The (65.00 Unapplied) message displayed at the bottom of the window generates a credit open item. A message appears that prompts you to verify the creation of this open AR item.
5. Click Yes.
6. Change the Paid Thru date for the item to reflect the date of the cancellation.
7. Click Save.
8. On the Dues/Subscription Payments by Individual window, click Save.
9. On the Dues Subscriptions window, select the canceled item and click Edit to open the Dues/Subscription Item Detail window in the edit mode.
10. Change the Paid Thru date to match the abbreviated term, and enter I (for inactive) in the Status field.

Now that the open credit item exists, you can refund the amount on the Credit Invoices window.

Business Object Designer

The Business Object Designer (BOD) is an administrative tool for viewing, editing, and creating iMIS business objects. It provides a graphical user interface to the properties related to business objects.

> **Note:** Important: As of 15.2.10, all Actions and Constraints are now removed from Business Object Designer in order to support optimal performance and scalability. If you added any actions or constraints to your own business objects, be aware that they will no longer run when your business object is used.

Understanding business objects

iMIS ships with an extensive collection of business objects that can be customized and extended. They can also be used as models for new business objects.

What is a business object?

A general definition, from the Object Management Group:

A business object is a representation of a thing active in the business domain, including at least its business name and definition, attributes, behavior, and relationships. A business object may represent, for example, a person, place or concept. The representation may be in a natural language, a modeling language, or a programming language.

An iMIS-specific definition, in terms of the Business Object Designer:

A business object is an iMIS system construct representing the data elements and business rules of a business concept, like a contact. It is implemented using a combination of business rules, a schema definition that describes the data structures of the object's properties, and a database view. Business objects are behind all of the controls within the iMIS database.

The following are the basic elements of an iMIS business object:

- Properties – attributes of the object (typically map to database columns). For example, Contact.LastName
- Branches – used to provide inheritance-like functionality for similar objects, for example, objects similar enough to be represented within a single object definition.

  How is a business object used?

  Business objects are used throughout the iMIS application to model business concepts and rules. They represent database tables, and can add additional logic to operations performed on the database tables. Business objects allow for runtime customization of iMIS behavior without access to source code.

  Business objects are more than just the tables where data is stored. They enable you to present data from within the database in a way that is user friendly and used by queries, windows, and other objects within iMIS.

  How does a business object work?

  After a business object is defined using BOD, its definition is stored and made available to the runtime environment.

  When an instance of a business object is created (instantiated), the business object definition is used to create an in-memory table structure (a .NET DataSet). This structure stores all data related to the instance of the object.

  As the instance of the business object is changed, changes are made to the in-memory structure. Changes are not written to the database until an explicit commit is performed.

Business object physical representation

A business object is composed of many elements:

- one or more database tables
- a schema definition
- a database view

  Database tables

At the lowest level, business objects represent database tables. Business objects can represent one table or multiple tables. BOD builds lists of tables that exist in the database. BOD does not create tables initially.

> **Note:** Note: Tables must be created using SQL Server Enterprise Manager or Query Analyzer.

Schema definition

The schema definition of a business object is stored in the iMIS database. You access the business object using the Document System. The schema definition defines all properties and their types, and is used to create the in-memory runtime representation of the object.

Database view

A database view is created to represent data access for a business object, containing all the necessary tables, columns, and joins. The view is used when running queries against business objects. The naming convention is vBo<BusinessObjectName>. For example, vBoAccessArea is the view associated with the AccessArea business object.

iMIS business object model

A business object is an iMIS system construct representing the data elements and business rules of a business concept like a contact. The business object is implemented using a combination of business rules, a schema definition that describes the data structures of the object's properties, and a database view.

The iMIS business object model sets the framework and foundation for most significant iMIS application objects such as customers, orders, products, inventory, tasks, and so forth. All iMIS business objects share a common construction methodology and standard ways of expressing their properties, attributes, and methods. iMIS business objects are extensible and customizable through the Business Object Designer.

Using the .NET dataset object model

The iMIS business object base classes are based upon the .NET DataSet object model. The .NET DataSet is the main target for data handling as created by the .NET design engineers. Modeling over the .NET DataSet and constituent components has a number of advantages and implications:

- iMIS business objects appear similar to .NET datasets.
- iMIS business objects support automatic binding in the development and runtime environment.
- All objects automatically have an XML representation.
- iMIS business objects utilize the standard DataSet constructs to share and express data and metadata.
- The term metadata is frequently literally defined as data about data. In the context of iMIS business objects, metadata is the structured, persistent data about business object resources, their characteristics, and their behavior.
- All of the properties are exposed to the outside world in the Dataset table/column/row object model.

Base classes for business objects

Business objects are implemented by inheritance from core .NET classes, specific to ADO.NET. This means that the features and power of the base class are available to the business object base classes:

- BusinessContainer – Container of business objects and their instances. Corresponds to a .NET Dataset (System.Data.DataSet class).
- BusinessController – Collection of business object instances and implementer of business logic. Corresponds to a DataTable (System.Data.DataTable class).
- BusinessItem – Contains a single instance of a business object. Corresponds to a DataRow (System.Data.DataRow class).

Benefits of iMIS business objects

This table summarizes the significant gains that business objects bring to the management and protection of both data and business rules:

.NET centric	Auto-binding to runtime controls Can be passed through web services Database persistence and persistence engine ready-made XML-ready .NET standard metadata structures
Automatically implements standardized object and column security for all objects	Keep sensitive data from entire staff or user population.
New types of objects	User-defined tables, survey, application forms, and so forth.
New columns	Extend product, order, referral, opportunities, issue management definitions.
Standard interface for all objects	Can be used directly by query tools, workflow, screen painters, export utilities, mail merge utilities, and so forth.

iMIS business rules

iMIS business rules provide the editable metadata to iMIS business objects. Non-visual classes and visual editors are provided for editing metadata. iMIS business rules provide a technical architectural model for object extensibility as well as a recognizable business concept.

The following types of business rules and metadata are supported:

- Column definitions

Property definitions

- Property type: virtual or persistent
- Data type, length, and so forth
- Captions, default values
- Descriptive dictionary type of information

Working with Business Object Designer

The Business Object Designer (BOD) is an administrator-level tool for viewing, editing, and creating business objects especially for iMIS. It provides a graphical user interface to the properties related to business objects. Do the following to explore Business Object Designer:

Go to RiSE > Business Object Designer:

1. Select a business object in the list, such as Campaign.
2. Click Edit.
3. Explore the Definition, Properties and Database tabs.

Which business objects for which jobs?

Cs* Objects for legacy tables

CS Business Objects (CsContact, CsActivity, and so forth) are objects related to the areas of iMIS you are most familiar with. For example, CsContact is an object that combines data from the Name and Name_Fin tables into a single, simple-to-query object in a location that is easy to find. Cs Business Objects are based on legacy iMIS tables.

Cs Business Objects are used in many instances. For example, if IQA is the only application running in your organization, you will use the CsObjects.

In addition, any tables built through the iMIS Customizer features will appear in the list of business objects as “CsName_” + TableName.

Commonly queried CsObjects include but are not limited to the following:

CsActivity	CsDuesHisotry	CsOrderLines
CsAddress	CsEvent	CsOrders
CsCalls	CsEventHistory	CsPledges
CsCommittee	CsFunction	CsProduct
CsContact	CsGeneralLookupTables	CsRegistration
CsDonations	CsInventory	CsRelationship
CsDonationsDetail	CsMemberType	CsStaffUser
CsDonorData	CsOrderHistory	CsSubscriptions

When to use CsContact versus NetContact

There are two versions of the Contact business object: CsContact and NetContact.

- Organizations that use business objects with IQA only can reliably use CsContact.
- Organizations that are licensed for any component of the Marketing Suite or Process Manager should use NetContact. NetContact is a required object within those modules.

Objects for business rules

Many objects within the list of business objects control how different business rules, most importantly security rules, are managed within the database. These business objects are system objects and should not be modified.

These objects include but are not limited to the following:

AccessArea	Group *	User
AccessItem	Role	UserRole
AccessMain	UniformRegistry	UserToken

Note: * There are many different objects with names beginning with Group.

Objects that support modules

In addition to the objects listed previously, other objects (used specifically by Process Manager, Marketing Suite, or iMIS Web Components) are listed in the Business Object folder. These objects include but are not limited to:

- Process Manager
- OpportunityMember
- OpportunitySales
- OpportunityDonor
- OppMemberContact
- OppSalesContact
- OppDonorContact
- Opportunity
- OpportunityHistory
- OpportunityReport
- OpportunityCompetitor
- OpportunityType
- ActionPlan
- Campaign Management
- Appeal
- AppealParticipation
- AppealProduct
- Campaign
- CampaignParticipation
- CampaignTypeRef

- Solicitation
- SolicitationStatusRef
- SourceCode
- SourceCodeStatusRef
- Package
- PackageItem
- PackageStatusRef
- Supplement
- Segmentation
- SegmentationDef
- SegmentationJob
- SourceList
- ListElement
- RFM Analysis
- RFM Analysis
- Content Management
- Document
- DocumentStorage
- Hierarchy (DocumentHierarchy, NavigationHierarchy, TagHierarchy)
- Perspective
- ContentChangeRequest
- ContentWorkflow
- NavigationPane

- NavigationWorkflow
- PublishMessageLog
- PublishPriority
- PublishRequest
- PublishRequestDetail
- PublishRequestStatus
- PublishServer
- TagRelationship
- TagRelationshipType
- UniformTag
- URLMapping
- UserDefinedField
- WebPartGalleryEntry

Objects built from user-defined tables

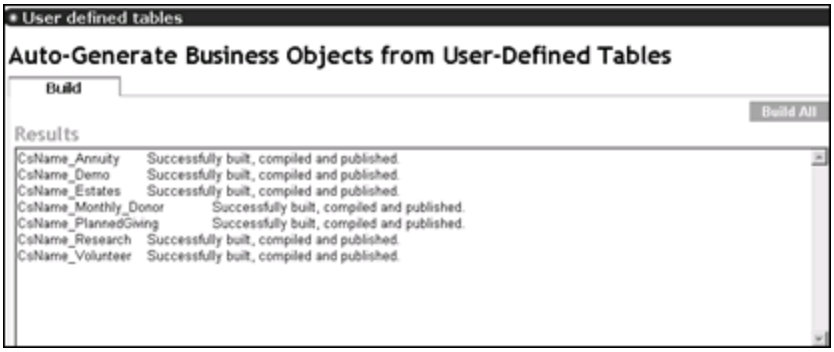
When iMIS is first installed or upgraded, any user-defined tables that are seen within the Customers area of iMIS are automatically built into business objects which can be queried.

Over time, it is often necessary to add new fields to Customers tabs and include those queries in IQA queries. This requires an additional step to complete the field addition after you have finished building the table and tab. Do the following to generate objects from user-defined tables:

Go to RiSE > Utilities > User defined tables:

1. Click Build All.

2. When complete, the User Defined Tables window will list the objects and status of the build of all customer tabs as follows:



> **Note:** Note: When the business objects are built they will be named using the following logic: “CsName_”+ Table Name from Customizer.

Accessing business objects

> **Note:** Note: You must have system-level administrator privileges to perform the tasks discussed in this section. Having administrator privileges for a given module is not sufficient authority to change business objects.

Business objects are central to creating IQA queries, generating reports, and running processes. You can view the list of available business objects by navigating to the Common folder in the Central Object Repository.

Finding underlying table data for business objects

Business objects are user-friendly abstractions and collections of data from the iMIS tables. These abstractions enable you to write powerful queries and reports safely, without needing to be familiar with the iMIS database schema.

In most cases, the business object name and the names of its various properties are suggestive enough to guide experimentation. At times, however, it can be useful to trace the properties of a business object to their underlying table columns. Do the following to trace business object properties to their underlying table data.

Go to RiSE > Business Object Designer:

1. Double-click the business object that you want to examine.
2. (Properties tab) Select the property that you want to trace.
3. (Properties tab > Definition tab) The Database Table and Database Column fields specify the table and column from which the property derives its data.
4. (Database tab) It can also be useful to examine the table joins used in a business object that comprises multiple tables. Examine the Joins field.

   Note: All joins in a business object are inner joins.

Building a new business object

To build a new business object, do the following:

- Build a new SQL table or view, or identify an existing one to use.
- Customize the properties for the new business object.
- Build and publish the new business object.

> **Note:** Note: If no table exists for this business object, open SQL Server and create it, granting appropriate permissions.

Go to RiSE > Business Object Designer:

1. Select New > Design Business Definition.
2. (Definition tab) Enter the business object's information.
3. Click Create Object.
4. Add properties to the business object, saving after you edit each tab:

1. (Database tab) Add the tables that contain the columns you want to use in your business object. In the Available Columns list, select which columns to use.
2. Click Add as Properties or Add All as Properties.

3. Select Save.
4. (Properties tab) Select properties from the list to define the property's characteristics. To create a lookup, select the field you want to edit.
5. (Properties tab > Value tab) Define any lookups you need.
6. Edit these values as needed.
7. Click Save.

5. Build and publish the new business object:

1. Select the object.
2. Click Edit.
3. Click Publish.

> **Note:** Note: If an error occurs when publishing the business object, check the Database tab and ensure that appropriate Joins are defined if more than one table is listed in the Tables list.

Reverting damaged business objects

If you have a damaged business object, you can fix it by reverting to a prior version. Access the version history using the Versions command.

> **Note:** Note: After you revert, you still see the damaged version in the list. No versions are destroyed through this process. Reverting to an earlier version copies the business object. You get a new version that matches the definition of the object version you selected.

Do the following to revert a business object.

Go to RiSE > Business Object Designer:

1. Select the damaged business object.

2. Click Versions to access to all prior versions of the object, if any.
3. Select an earlier version you know to be undamaged.
4. Click Revert.
5. Click OK at the following prompt to publish the selected earlier version:

   Are you sure you want to make this version the current working version?

   The selected version becomes the current Working version.

   Note: The object is not reverted until Published.
6. Click Close.
7. Edit the new working version's properties, if desired:

- To simply revert the object to its prior state, do not make any edits.
- To create a modified version based on a prior state, make appropriate edits.

8. Click Publish to publish the object.

Managing business object properties

Changing property displays

A property's display determines what your users see in iMIS. The property's display value is used by default on windows and outputs, but you can design queries to override these defaults.

Do the following to modify a property display.

Go to RiSE > Business Object Designer:

1. Select an object from the list.
2. Click Edit.
3. (Properties tab) Select the property to be changed.
4. (Properties tab > Display tab) Change the value of Prompt for Field.

5. Click Save, and then Publish. Any messages should state that there are no errors.
6. Click Close.
7. Test your changes. Write a query against the object and select the updated property on the (Display tab).

   Adding value lists to properties

   Adding value lists to properties can make querying and data entry easier for end users. Value lists define the values that can be stored or selected for a property.

   There are three ways of adding value lists to properties:

- Use IQA to query the values from an object within the database, for example, General Look Up tables or CsActivityTypes.
- Use a Finder option to search for records within the database.
- Manually add the codes and expansions to the property within the business object.

  In many ways, using IQA to manage value lists is the most flexible and user-friendly way to manage a lookup. Values can be added to look up tables and to the modules within iMIS. Interfaces can be modified by adding values to a table that otherwise would not be available to users. These interfaces can be accessed by users who do not have the SysAdmin role access in iMIS. Value lists that are managed within the business object can only be managed through the Business Object Designer.

  The Business Object Designer allows for value displays to be built directly within the object itself.

  Do the following to build a value display manually.

  Go to RiSE > Business Object Designer:

1. Select an object from the list.
2. Click Edit.
3. (Properties tab) Select the property that needs values.

4. (Properties tab > Values tab) Select the Value List radio button.
5. Build your value list by entering the Code into the Data Value property column, and the Expanded Description for the Code into the Display Value column.

   Note: Note: The Data Value can match the Display Value as long as the Code Value is no longer than the Data Type allows. Spaces can be used as well.

6. Click Save, and then Publish. Any messages should state that there are no errors.
7. Click Close.
8. Test your changes. Write a query against the object. Select the property on the Filters tab, and confirm that it now includes a Value list.

Defining property values using IQA

Do the following to build a query:

1. Optional: Build the lookup table that you want to use to manage the value in SQL Server.
2. Build the query that will define the lookup table. Be sure that the (Display tab) displays the code value as well as the expanded description.
3. Save the query in the Document System in Common > Queries > Value Lists.

Do the following to select values to display for a property.

Go to RiSE > Business Object Designer:

1. Select an object from the list.
2. Click Edit.
3. (Properties tab) Select the property that needs values.
4. (Properties tab > Values tab) Select the Query Object radio button.
5. Browse for and select the query you saved.
6. Define the Data Value to match the code that exists in the data.

7. Define the Display Value to match the expanded description that describes the Data Value.
8. Click Save, and then Publish. Any messages should state that there are no errors.
9. Test your changes. Write a query against the object. Select the property on the (Filters tab), and confirm that it now includes a Value list.

Defining property values using a finder

The Document System contains queries that are used in different areas of iMIS to search for customer records. These queries are found in the Common > Queries > Search folder.

The finder allows one of those queries to be used as a pop up search option within a prompt much as the Key Contact search operates within Process Manager.

Do the following to attach a query as a Finder to a field.

Go to RiSE > Business Object Designer:

> **Note:** Note: Make sure you have a query you will reference with your search and that the query includes the ID Number and the Full Name or Company Name on the (Display tab). Save this query in a central location, such as Common > Queries > Search.

1. Select an object from the list.
2. Click Edit.
3. (Properties tab) Select the property that needs values.
4. (Properties tab > Values tab) Select the Finder radio button.
5. Browse and select the query you want to attach.
6. Define the Data Value to match the ID that exists in the data.
7. Define the Display Value to match the expanded description that describes the Data Value.
8. Click Save, and then Publish. Any messages should state that there are no errors.

You can use a finder with a business object as the source for the Finder's data, instead of having to build an IQA query to return the records.

Do the following to use a Finder with a referenced object.

Go to RiSE > Business Object Designer:

1. Select an object from the list.
2. Click Edit.
3. (Properties tab) Select the property that needs a finder.
4. (Properties tab > Definition tab) In the References Object field, enter the name of the business object you want to use to populate the Finder.
5. (Properties tab > Display tab) Select Finder as the Display Control.
6. Click Save, and then Publish. Any messages should state that there are no errors.

Adding properties to business objects

You can add new properties to your objects that are based on a table or view in your iMIS database.

Do the following to add a new property to a business object.

Go to RiSE > Business Object Designer:

1. Select an object from the list.
2. Click Edit.
3. (Database tab) Select the property from the Available Columns that you want to add to the object.
4. Click Add as Properties or Add All Properties to move the property from Available Columns to Used Columns.

   Note: Any properties you add to the business object will display at the end of the list of properties displayed in the (Filters) and (Display) tabs in IQA.

5. Click Save, and then Publish. Any messages should state that there are no errors.
6. Test your changes by writing a query against the object. Add the new property on the Display tab.

Business Object Designer field reference

When editing a business object, you work in the Business Object Designer window. The buttons described in this section are available for each tab of the interface.

The Business Object Designer is found under the RiSE menu.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.

Commands

- Save – Saves changes to the Business Object Designer object. Changes will not go live in iMIS until the object has been published. You must save an object before you can publish it.
- Publish – Publishes serialized metadata for the Business Object Designer object for use by BusinessRuleBase. Once the object is published, it is available to IQA and other controls within iMIS.

Business Object Designer Definition tab

The Definition tab includes the name of the object, its status (Active or not), and a field to record a metadata description of the business object's role. In addition, certain objects inherit properties from parent objects. The definition of which object inherits properties can be viewed on the (Definition tab) as well as the join between the parent and child objects.

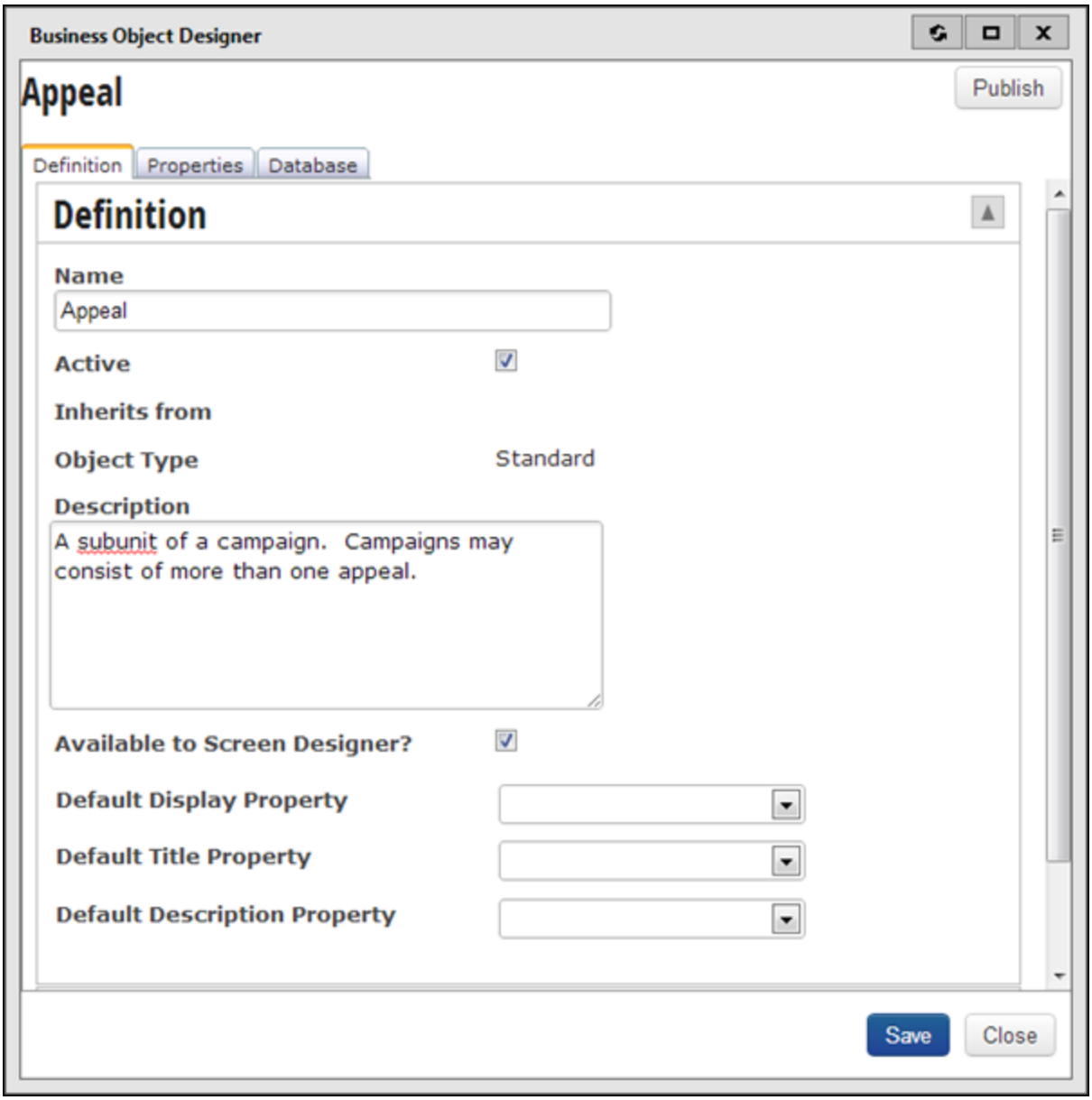
> **Note:** Note: The Object Type defaults to Standard, which is editable. Any object that is not a Standard type is generated outside of Business Object Designer. You

> can use these non-standard objects in your queries and reports, but they are read-only in Business Object Designer to prevent changes to their required structure.

By default, the Business Object Designer (Definition tab) is found under RiSE.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.
- Select the (Definition tab).



Definition

- Name – The name of the Business Object Designer object.

  Caution! Do not use SQL Server-reserved keywords as object names. Examples include ADD, GOTO, JOIN, and WHILE.

- Active – Indicates whether the object is Active (being used). If unchecked, the object is archived.

- Inherits from – If the object inherits from another object, the name of that object is displayed here and a red X is displayed next to the name. The red X enables you to remove the inheritance, making this object standalone. If the object does not inherit from another, a Browse button is displayed. Click the Browse button to find an object in the document browser. Select that as the base object from which the current object will inherit.
- Description – A text description of what the object is meant to do. This appears in the tool tip help and also in the summary in the Document Browser.
- Available to Screen Designer? – Unused.
- Default Display Property – Indicates which property should be returned when the business object is referenced as a foreign-key by another business object.
- Default Title Property – Unused.
- Default Description Property – Unused.

  Branches

  This section displays a tree view of business objects related to the open object. Branched objects inherit properties from the top Root object. Do the following to establish a branch.

  Go to RiSE > Business Object Designer:

1. Select New > Design Business Definition.
2. (Definition tab) Click Browse.
3. Select the root object.
4. Click OK.
5. Click Create Object. Make any required changes to the branched object.
6. Click Save, and then click Close.

> **Note:** Note: If you create a Copy of a Root object, you must recreate any branched objects that you require. Branch relationships are not saved during the copy. You cannot copy branched objects.

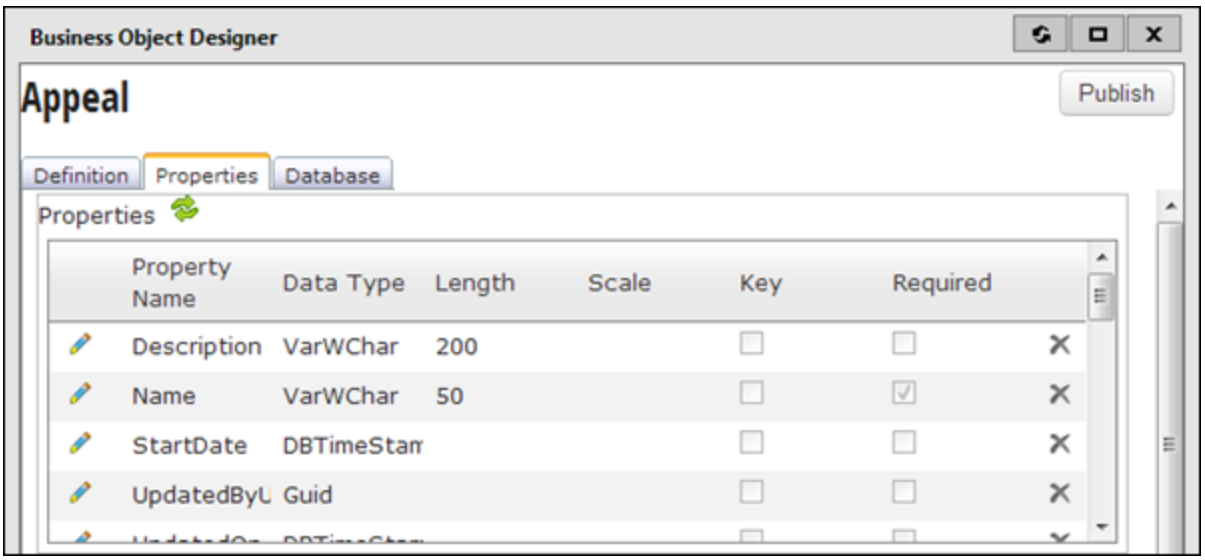
Business Object Designer Properties tab

The Properties tab displays each of the fields within the object and the specific attributes associated with those fields. Properties are defined initially from their SQL tables or views. Properties are attributes of the object (such as Contact.LastName). The Properties section lets you add, remove, and edit property values and their characteristics. The initial property entries that correspond to database columns are typically generated from the Database page.

By default, the Business Object Designer (Properties tab) is found under RiSE.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.
- Select the (Properties tab).



Properties

- Property Name – The name of the property.

  Caution! Do not use SQL Server-reserved keywords as property names.

- Data Type – A drop down list of available data types for the property. The choice here yields the data type of the property on the object and in the database if the property is to be stored in the database. The drop down list is only available when creating a new object.
- Length – This value is only shown if Data Type can have a variable length (for example, VarWChar, Numeric). It is the maximum length of the data allowed in the property. It is the length of the data in the column in the database if the property is to be stored in the database. It is also the maximum length of the data input field for properties that display in the UI and have a maximum length as a parameter (for example, Text Box).
- Scale – This value is only shown if Data Type is Numeric. It is the number of digits to the right of the decimal point.
- Key – If checked, the property is part of the Primary Key of the object, and the property is part of the database table if the property is stored in the database.
- Required – If checked, the property must be set before the object can be saved or used. This column also marks the corresponding database column as NOT NULL if the property is stored in the database
- X – This column deletes the property from the object. This item also removes the column from the database table after a warning if the property is stored in the database.

Business Object Designer Properties tab – Definition sub-tab

This tab stores the physical data definition of the property. Property definitions are initially defined from SQL and can be refreshed from the database at any time.

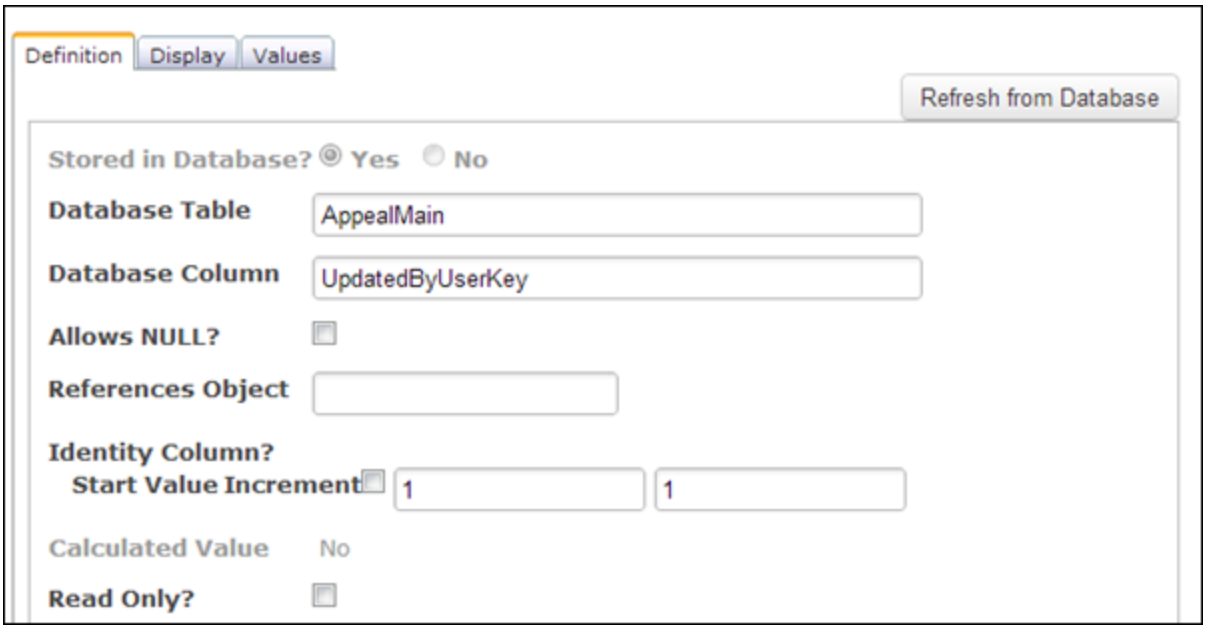
By default, the Business Object Designer Definition sub-tab is found under RiSE.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.

- Select the (Properties tab).

  Caution! Do not use SQL Server-reserved keywords as table or column names.



  Stored in Database?

  This option indicates whether the field is stored in the database. This option is disabled and always set to Yes.

  Database Table

  This drop-down contains any tables used in defining the object, with the default being the table name that matches the object's name, if any.

  Database Column

  This value defaults to PropertyName (from the Property List) if you are creating a new object by adding properties. PropertyName from the Property List defaults to this value if you are reverse-engineering existing tables.

  Allows NULL?

  This option allows a null value to be entered for the property when the property is saved. When this option is cleared, data must be entered for the property before the property can

be saved. This value is inherited from the database, but this value can be manually changed here.

References Object

This field indicates the business object for which this property is a foreign key.

Identity Column?

This option indicates whether the column auto-increments. If enabled, the following values are used:

- Start Value – This is the initial or seed value (integer) of the identity. The default is 1.
- Increment – This is an integer by which the identity is incremented with each new row. The default is 1.

Calculated Value

Unused.

Read Only?

If checked, the property's value cannot be modified. This option is automatically checked if there is an expression for Calculated Value and cannot be changed.

System Property? (Internal Use Only)

Identifies a property as system-defined. When selected, the property can only be modified by an administrator.

Log All Changes?

If checked, any change made to the value stored in this property is logged to the change log.

Query Builder

Enable these options to expose the property for use in queries.

- Available to Query Builder? – Makes the property available for use in IQA whenever the business object is selected as a source.

- Automatically Include in Queries? – Automatically includes the property in an IQA query result set whenever the business object is selected as a source.

  Security

  Unused.

  Description

  A free-form text description for the property. The description is available as a tool tip in the Screen Designer.

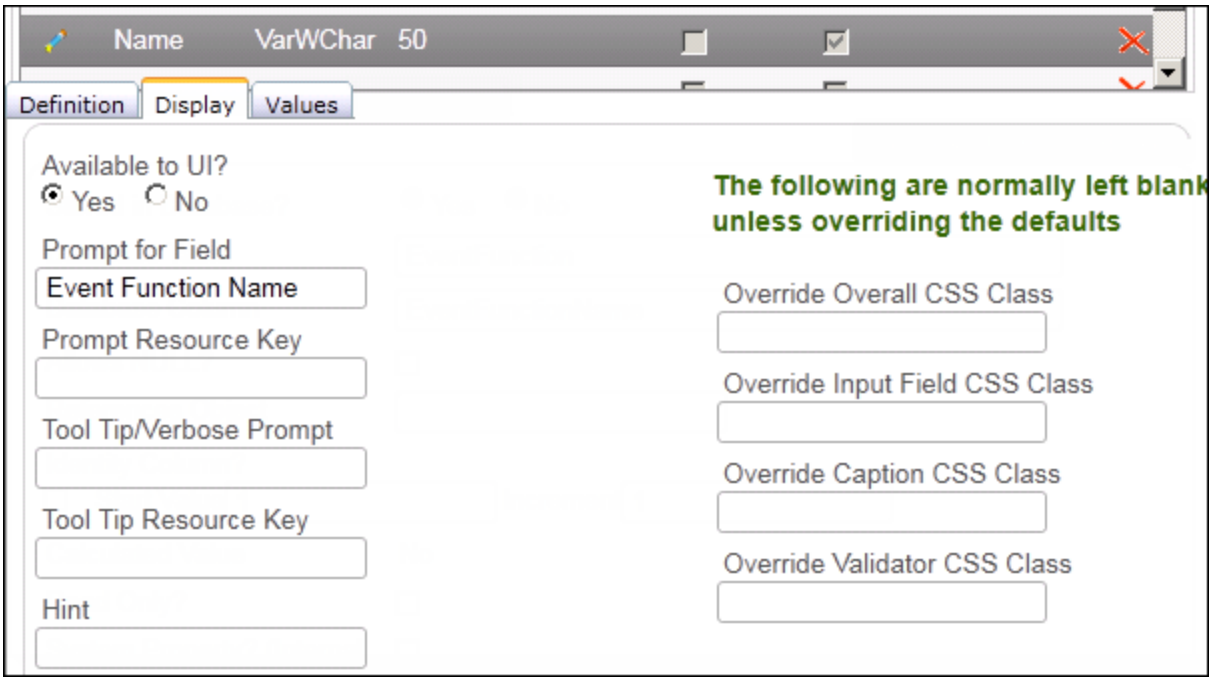
Business Object Designer Properties tab – Display sub-tab

This tab contains data about the caption/prompt for the field, as well as the ability to display or hide a property from IQA. Also, specific properties can be identified as default display values within IQA.

By default, the Business Object Designer Display sub-tab is found under RiSE.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.
- Select the (Properties tab), then select the Display sub-tab.



Available to UI?

This option exposes the property for use across iMIS, such as for queries.

Prompt for Field

This prompt is displayed in front of the data display or data entry control in the screen designer (previously called Caption).

Prompt Resource Key

This field specifies the resource key to use when rendering this property's prompt. Enter resource keys in the form [BaseResourceFileName or ClassName].[ResourceID]. For example, WebResources.FirstName.

Tool Tip/Verbose Prompt

This field specifies the text to be displayed in a tooltip when the user hovers over a UI element that is bound to the selected property.

Tool Tip Resource Key

This field specifies the resource key to use when rendering this property's tool tip. Enter resource keys in the form [BaseResourceFileName or ClassName].[ResourceID]. For example, WebResources.FirstName.

Hint

This field specifies the hint text to be displayed after this property's data entry control.

Hint Resource Key

This field specifies the resource key to use when rendering this property's hint text. Enter resource keys in the form [BaseResourceFileName or ClassName].[ResourceID]. For example, WebResources.FirstName.

Pop-up Help

This field specifies the help text to be displayed in a pop-up window when the user clicks the help button next to the UI element that is bound to the selected property.

Pop-up Help Resource Key

This field specifies the resource key to use when rendering this property's pop-up help text. Enter resource keys in the form [BaseResourceFileName or ClassName].[ResourceID]. For example, WebResources.FirstName.

Keyboard Shortcut

This field specifies a keyboard shortcut to access this property.

Display Control

This drop-down allows the object designer to specify what data entry control should be used for this property in the Screen Designer. The choices available are not limited based on the data type of the property or whether the property references another object. Select an appropriate control for the data type.

Display Width

This field is shown only if Display Control is set to a value that takes Width as a parameter, for example, text box, text area. The width is expressed by number of characters in the column.

Display Height

This field is shown only if Display Control is set to a value that takes Height as a parameter, for example, text area, list box.

Allow multiple selection?

This field allows one or more selections to be made from a list of values in this property's control. When cleared, multiple selection is not allowed.

Use Auto Capitalization?

This field applies iMIS auto capitalization rules to the data entered for this property. When cleared, auto capitalization is not applied.

Display Mask

This field is shown only if Display Control is set to a value that allows for display masks, for example, text box. This field lists the pre-built system display masks such as Phone Number, Credit Card, Money, Percent, and so forth.

Format Regular Expression

This field specifies the regular expression to be used to format the data entered for this property.

Watermark Text

This field specifies the text to be shown as a watermark in the data entry control for this property. When cleared, no watermark text appears.

Watermark Resource Key

This field specifies the resource key to use when rendering this property's watermark text. Enter resource keys in the form [BaseResourceFileName or ClassName].[ResourceID]. For example, WebResources.FirstName.

User Defined Mask

This field is shown only if Display Control is set to a value that allows for display masks, for example, text box). This field allows the object designer to specify a mask using a pre-defined set of formatting symbols. The Help button explains the syntax and provides examples.

Display Orientation

This field is shown only if Display Control is set to a value that takes orientation as a parameter, for example, multiple checkboxes, radio buttons, and so forth. If Horizontal is selected, the choices are displayed from left to right. If Vertical is selected, the choices are displayed from top to bottom.

Display Columns

This field is shown only if Display Control is set to a value that takes Columns as a parameter, for example, multiple checkboxes, radio buttons, and so forth. In conjunction with the Display Orientation field, the number of columns indicates how the set of choices will be displayed on-screen.

Related Property

This field relates this property to another property of the business object.

Show Easy edit?

This option displays the Easy edit button next to this property's data entry control for authorized users. When cleared, the button is not displayed.

Path to Web Service

This field specifies the URL path to a web service that provides data for this property's data entry control.

Web Service Method Name

This field specifies the method name to be called from the web service defined in the Path to Web Service field.

Valid Characters

This field specifies a list of characters that are valid for data entry in this property's data entry control.

Show Password Strength?

This field displays a password strength indicator under this property's data entry control. When cleared, the indicator does not appear.

Starting Path

This field specifies the default path the Document System Browser should start with if this property's data entry control prompts the user to select a path.

Validation Regular Expression

This field specifies the regular expression to be used to validate the data entered for this property.

Validation Message

This field specifies the text to be displayed when the data entry control fails validation.

Validation Message Resource Key

This field specifies the resource key to use when rendering the Validation Message. Enter resource keys in the form [BaseResourceFileName or ClassName].[ResourceID]. For example, WebResources.FirstName.

Validation Range Start/End

This field specifies the start and end range to be used for the range validation in the Number Up/Down control.

Override Overall CSS Class

This field specifies the default CSS class to use when rendering this property's caption/prompt, read-only control, and data entry control.

Override Input Field CSS Class

This field specifies the default CSS class to use when rendering this property's data entry control.

Override Caption CSS Class

This field specifies the default CSS class to use when rendering this property's caption/prompt.

Override Validator CSS Class

This field specifies the default CSS class to use when rendering this property's validation.

Business Object Designer Properties tab – Values sub-tab

This tab allows users to define lookup values for a property in one of two ways:

- Manually built using codes and values within Business Object Designer.
- Built using a reference IQA query.

By default, the Business Object Designer Values sub-tab is found under RiSE.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.
- Select the (Properties tab), and then select the Values sub-tab.

Default Value

This field allows the object's designer to indicate what data, if any, should be pre-selected or pre-filled in the field when creating a new instance of the object (Add/New).

Values Come From

This option indicates the source, if any, for the allowed values for this property. The choices are:

- Freeform data entry – The default, if it is available. This option indicates that users should type in the value, for example, for a text box or text area. This choice is only available if the data entry field allows for freeform entry.
- Finder – If the data entry control for the property is a finder, this value is selected and no other choice is available. If the data entry control for the property is not a finder, this choice is not available.
- Query Object – This option indicates that the list of allowed values derives from an IQA query. This choice is only available if the data entry field allows for list type data entry, for example, drop-down list, list box, combo box, radio buttons, multiple check boxes, and so forth.
- Value List – This option indicates that the list of allowed values comes from the object's designer. This choice is only available if the data entry field allows for list type data entry, for example, drop-down list, list box, combo box, radio buttons, multiple check boxes.

Query

This item is shown only if the Values Come From selection is Finder or Query Object. This item specifies which IQA query to use for the finder or list. If specified, the name of the query object is shown read-only. In either case a Browse button is available to enable you to locate the query to use through the Document Browser. There is no delete or clear button. A Query Object is required for Finder and Query Object types and is not available to other types.

Data Value

This item is shown only if the Values Come From selection is Finder or Query Object. This option indicates which property/field of the Query Object is stored in the Property when you make a selection.

Display Value

This item is shown only if the Values Come From selection is Finder or Query Object. This option indicates which property/field of the Query Object appears on-screen.

Values

This item is shown only if the Values Come From selection is Value List. This item allows the object's designer to enter the allowed values for the field.

- The Data Value fields contain the value to be stored in the property when you select the row.
- The Display Value fields contain the value to be shown to the end user when entering data into this property.
- Select More to append five additional rows for value entries.

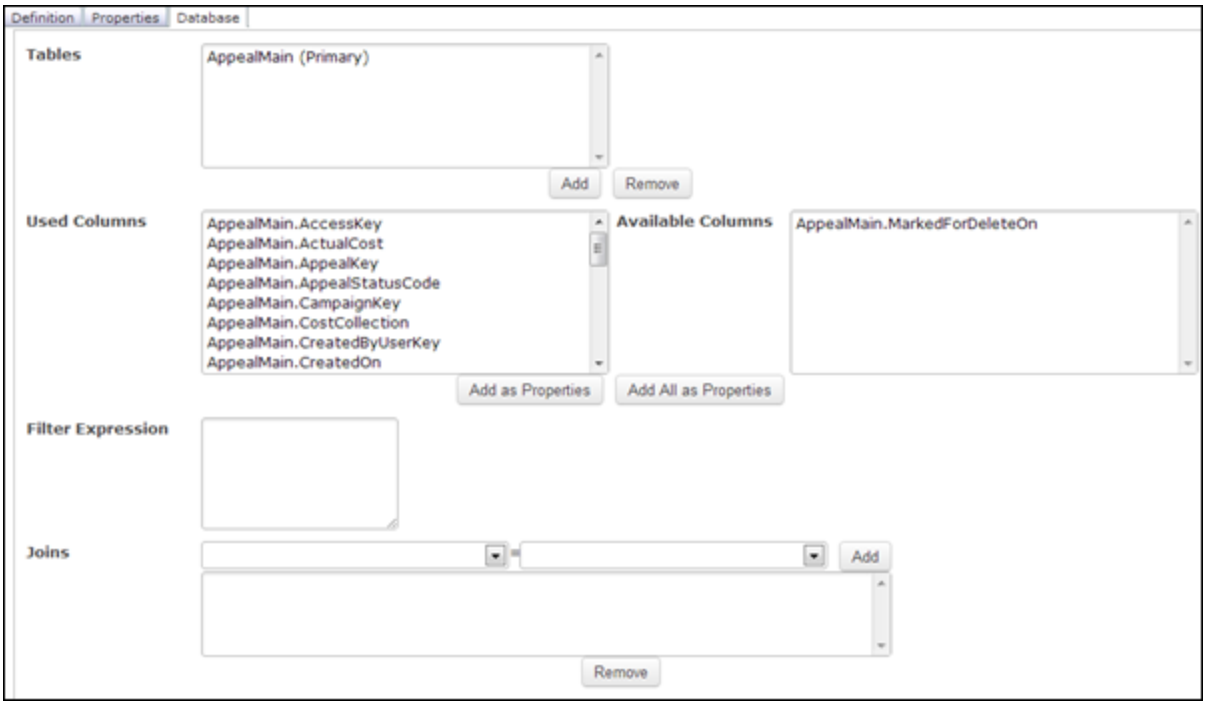
Business Object Designer Database tab

The Database tab defines the connection between physical tables and views within the iMIS database and the properties of the business object. The properties of a business object can comprise single or multiple tables and views. Where multiple tables and views are defined, an appropriate set of inner joins must be defined.

By default, the Business Object Designer (Database tab) is found under RiSE.

Go to RiSE > Business Object Designer:

- To create a new object, select New > Design Business Definition.
- To edit an existing object, click Edit.
- Select the (Database tab).



Tables

This field specifies which tables from the iMIS database are used as the object's data source, similar to the FROM clause of an SQL SELECT statement. To specify the tables in this list, use the Add and Remove buttons. The first table that you add is automatically designated as (Primary), which has no system effect and is meant only to indicate which table was added first to the object.

Used Columns

This field specifies which columns from the tables specified in the Tables field are used as the object's properties, similar to specifying column names in the SELECT clause of a SELECT statement. The columns that you select here are listed on the (Properties tab). To specify the columns in this list, select one or more columns from the Available Columns list, and then click Add as Properties. Press Ctrl or Shift to select multiple columns.

Filter Expression

(Optional) This field specifies a filter expression that further limits the table rows that are acted upon by this business object, similar to the WHERE clause of an SQL SELECT

statement. The filter expression is applied after the result set of any Joins specified for this object. You must omit the WHERE keyword itself. If there is more than one table listed in the Tables field, you must use qualified column names to prevent ambiguity, as shown in the following example using the ACTIVITY_TYPE column from the Activity table:

Activity.ACTIVITY_TYPE='F'

You must specify only a single WHERE clause, because multiple tables listed in the Tables field are joined with an inner join.

Available Columns

This field specifies all of the columns that are available for use as properties for this object. The list comprises all columns from all tables specified in the Tables field, minus the columns that have already been added to the Used Columns list.

Joins

This field is required if more than one table is specified in the Tables field. This field specifies inner joins between the tables specified in the Tables field, which limits the table rows on which this business object acts to the result set created by the joins. The drop-down lists enable you to choose the columns for each join. Click Add to add the join to the list of joins for this object.

Multiple joins between the same two tables are expressed with a Boolean AND operator in the same INNER JOIN clause. Every join between a different pair of tables is expressed as a separate INNER JOIN clause.

For example, assume that you've added Table1, Table2, and Table3 to the Tables field, and you have added all of the Available Columns to the Used Columns field. Add the following three joins to the Joins list:

Table1.Column1 = Table2.Column1

Table1.Column2 = Table2.Column2

Table2.Column3 = Table3.Column3

In this case, an analogous SELECT statement would be:

```
SELECT *
 FROM Table1
 INNER JOIN Table2
   ON Table1.Column1 = Table2Column.1
   AND Table1.Column2 = Table2.Column2
 INNER JOIN Table3
   ON = Table2.Column3 = Table3.Column3
```

Business Object Designer does not support the creation of cross joins, outer joins, or any join type other than an inner join. The joins that you define here are available as default joins when using the object in an Intelligent Query Architect (IQA) query, but IQA also gives the option to create different, custom joins for the tables underlying the business objects used in the query.

Examples of business object customizations

Adding a new business object

ALERT: Needs re-checking since UI changed.

This example creates a business object for the Name_Note table and exercises the business object with a query.

Go to RiSE > Business Object Designer:

1. Select New > Design Business Definition. The New Object window is displayed.
2. Enter CsName_Note as the Name for this example.
3. Click Create Object.
4. (Database tab) Click Add. A window listing all the iMIS database tables appears.

5. Select the Name_Note table and click OK. The Name_Note table is added to the Tables field, and its columns are added to the Available Columns field.
6. In the Available Columns field, select all the columns except Name_Note.TIME_STAMP, which is used for iBO concurrency, and does not apply to this example.
7. Click Add as Properties.
8. Click Save.
9. On the (Properties tab), examine the automatically generated entries on the Description, Type, Display, and Value tabs.
10. (Properties tab > Definition sub-tab) For the following properties, verify the Available to Query Builder and Automatically Include in Queries options are checked:

- ID
- NOTE
- NOTE_NUM
- PURPOSE

11. Click Save and then Close.
12. Click Publish.
13. Click OK and then Close.
14. Open Intelligent Query Architect.

    Create a new query in a working folder.

    Go to RiSE > Intelligent Query Architect:

1. Select the folder Scratch.
2. Select New > Query.
3. Enter a Name for this query.
4. (Define tab > Sources sub-tab) Click Add Source.

5. In the Document Browser, go to $/Common/Business Objects.
6. Select CsName_Note. Click OK to add it to the Query Sources list.
7. (Define tab > Display sub-tab) The four columns in the display set are selected.
8. Click Save As. On the Document Saver window, enter CsName_Note query as the name for this query.
9. Click OK.
10. Click Run to see the sample output.

Do the following to generate extended results:

1. (Define tab > Sources sub-tab) Click Add Source.
2. In the Document Browser, go to $/Common/Business Objects.
3. Select CsName_Note. Click OK to add it to the Query Sources list.
4. Add the Name table to the business object, display FULL_NAME in the query results, and republish.
5. In BOD, Edit the CsName_Note business object. Select Physical, and add the Name table to the Tables list. Add Name_Note.ID=Name.ID to the Joins list, by selecting the columns from the left and right drop-down lists.
6. Select Columns, select Name.FULL_NAME, and add a property for the column.
7. On the (Properties tab), select the Display sub-tab.
8. Add FullName to the Display Set.
9. Select Save, Close, Build, and Publish.
10. In IQA, open the query for this business object.
11. On the (Sources tab), click the Remove icon to remove the existing source.
12. Click Add Source and re-add CsName_Note.

Note: Business object changes aren't automatically reflected in queries that use them.

13. On the (Display tab), change the order to have Id and Full Name first. Use the Refresh button as you go to confirm the order. Save the query.
14. Select Run to see the query results.
15. On the (Summary tab), switch to Advanced mode to see the SQL for the query.

Editing an existing business object

ALERT: Needs re-checking since UI changed.

The following example changes a display property on the Campaign object and shows the change from the application.

Go to Community > Manage marketing campaigns > Define campaigns:

1. Select a campaign. Note the values for Name and Campaign Code. These values come from the business object.

   Go to RiSE > Business Object Designer:

2. Select the Campaign object.
3. Click Edit.
4. (Properties tab) Select the Name property.
5. (Properties tab > Display sub-tab) Change the Prompt for Field entry to the Campaign Name.
6. (Properties tab > Display sub-tab) Change the Description to the Campaign Description.
7. Click Save, and then Close.
8. Click Publish.
9. Click OK, and then Close.

   Go to Community > Manage marketing campaigns > Define campaigns:

10. Select the campaign from Step 1. Note the values for Name and Campaign Code.

Creating business objects for user-defined tables

This example creates, builds, and publishes business objects for all user-defined tables set up in iMIS Customer Management. It edits one of the business objects, changing display set and prompt entries, and tests the new business object in IQA.

1. From Customers, select > Set up module > General and click Additional Windows.

   The Customer Setup window appears.

2. Verify that the Defined Tables list contains the Name_Demo table. This table (included in the demo database) is used in this example.

3. Close the Customer Setup window.

   Go to RiSE > Utilities > User defined tables:

   The Auto-Generate Business Objects from User-Defined Tables window is displayed.

4. Click Build All. Wait for iMIS to generate business objects. The Build Results field will display a log of the business objects that were built, compiled, and published.

5. Verify that CsName_Demo is listed in the Build Results field.

6. Go to RiSE > Business Object Designer.

7. Select the CsName_Demo object.

8. Click Edit. The CsName_Demo object is displayed.

9. (Properties tab) Verify that a Property Name value exists for each column in the Name_Demo table.

10. Add the ID, Spouse, and School_Attended properties to the object's display set. Change the displayed caption for School_Attended property:

1. (Properties tab > Display sub-tab) In the Property Name area, select the row containing the ID property. The values shown in the Display sub-tab change to the defined display set values for the ID property.

2. (Properties tab) > (Definition sub-tab) select the Automatically Include in Queries? check-box.
3. (Definition tab) In the Default Display Property? List, select ID.
4. Repeat steps a through c for the Spouse and School_Attended properties.
5. (Properties tab > Display sub-tab) For the School_Attended property, change the Prompt for Field value from School _Attended to Alma Mater.
11. Click Save and wait a moment for your changes to be saved to the business object.
12. Click Publish. A results window is displayed, listing any messages and errors.
13. Ensure that the business object published without errors. Click Close.

    Note: Rerunning the Build All command in the Auto-Generate Business Objects from User-Defined Tables window will cause your changes to be overwritten and lost. The business objects for user defined tables are recreated by that operation.
14. Go to RiSE > Intelligent Query Architect.
15. Select New > Query.
16. Create a new query named New Query.
17. (Sources tab) Click Add Source.
18. Select CsName_Demo.
19. Click OK.
20. Click Save to save the query.
21. Click Run. The result set for the query is displayed. Notice that the three columns shown in the query result set match the three properties that you defined for the business object's display set.
22. Modify the query to return only those records that contain non-null values for either Alma Mater or Spouse. Creating an OR evaluation like this requires you to define two separate filter sets:

1. Click Define.
2. (Filters tab) Select Advanced in the Mode drop-down list.
3. Select Spouse in the Property drop-down list.
4. Select Not Empty in the Comparison drop-down list.
5. Click the Add Line icon +. The filter is added to the filter set.
6. Click Add Filter. A new filter set is added below the first filter set.
7. Select Or in the drop-down list to the left of the Property column header.
8. Repeat steps c through e in the new filter set to add the Alma Mater property and specify a Not Empty comparison value.

23. Click Save to save the query.
24. Click Run. The result set for the query is displayed. Notice that the result set for the query now contains only those records that contain values for Alma Mater or Spouse.

Certification

Overview: Certification

Welcome to iMIS Certification. This feature provides you with a highly organized and integrated tool for managing your organization's certification programs.

In this section you learn to set up the system options, maintain the tables, and complete all the other requirements for managing a certification program. The exercises in this guide walk you through system setup, table maintenance, component and program management, component and program registration, and reports and inquiries.

This guide covers Certification functionality in the following order:

- Entering and Managing Registrations
- Testing for Completion and Purging Registrations
- Canceling, Closing, and Deleting Programs
- Generating Reports
- System Setup
- Table Maintenance
- Setting Up and Maintaining Components
- Setting Up and Maintaining Programs

Benefits of Certification

The Certification module helps your organization grant credits to customers for activities or achievements. For many organizations, these credits are in the form of CEUs (continuing education units) that customers are required to complete in order to maintain a certain status or designation in their profession or industry. The Certification module gives you great flexibility in the design of these requirements, allowing you to adapt your system to the unique conditions and qualifying factors of your organization's certification program.

The Certification module integrates with several other iMIS modules.

Customer Management

- Uses customer contact files that are maintained in the Customer Management module as student files for certification programs
- Uses the customer records of students registering for components, as well as component providers and component instructors
- Generates activity records when a student enrolls in a program or when the component registration record is purged, if the appropriate option is enabled.

Events

- Generates Certification CEU credits from attendance at event functions
- Creates CEU activity records when an event is closed and when program participants receive appropriate corresponding certification component credits

AR/Cash

- Generates accounting entries when a certification order is entered
- Tracks and records balances owed
- Generates invoices for certification orders

Orders

- Automatically generates orders when a student registers for a component unless you elect to suppress this functionality.
- (You also can elect to suppress the creation of orders that have no cost associated with them or automatically create orders only when there is a cost associated with the component.) View component orders through the Enter and edit orders window.
- Creates CERTIFY activity records when the component order is invoiced

iMIS Certification Terms

Following are terms used frequently in the Certification module:

Category

A category is a group of components similar to university courses grouped by department. You can group component requirements into categories so that completion of some or all of the components meets the category requirement. For example, an initial certification may require 18 hours of education, which can be derived from several different categories, such as Accounting, Economics, Finance, and Electives. The individual courses within the categories are the components.

Component

A component is an individual program requirement, such as a course or fee, whose completion is required for certification. Components can be tracked without a program.

Pass

A student “passes” a component when the requirements of that component are met.

Program

A program is the set of requirements an individual must complete to achieve a specific certification. A program also may have multiple parts, such as a set of initial requirements to obtain certification and another set of requirements to maintain the certification. Programs also may indicate specific dates on which certification must be completed.

Initial Program Requirements

Initial requirements are those requirements a student must complete to receive the initial certification. For example, the individual seeking certification may have to fill out an application, submit a fee, complete a certain number of education hours, and pass an exam to receive the initial certification. These requirements may or may not be used in conjunction with a different set of requirements to maintain certification.

Maintenance Program Requirements

Maintenance requirements are those requirements that a student must complete to maintain the certification after earning the initial certification. Typically, maintenance requirements must be completed over a specific period. For example, a student must complete

nine hours of continuing education during a two-year period in order to maintain certification.

Grace Period

A grace period is the additional time given to students to complete a set of maintenance requirements. For example, if a student does not complete the maintenance requirements for a designation, the student has an additional six-month grace period to complete the requirements to maintain the designation.

Designation

A designation is an acronym awarded to a student to use with his or her name to indicate that the student has completed a certification program and is therefore certified in a specific area.

Completion

A student “completes” a program when the student has completed all the requirements of that program.

Rollover

When a student completes the initial requirements for a program, the student's record rolls over to the maintenance portion of the program. This can be an automatic process or a manual process, depending upon the rollover option you select.

Special Features of iMIS Certification

iMIS Certification offers several features to help you manage your certification program:

- User-defined tables that allow you to specify requirements at the program (Certified Accounting Specialist), category (Accounting courses), and component (Accounting 101) levels. These tables form the basis for determining the student's certification status.
- The ability to maintain multiple certification programs, which can represent discrete programs or levels (such as Beginner through Advanced to track complex certification requirements). You can “clone” program and component definitions to generate related programs or components quickly.

- The ability to generate inquiries and reports to disclose the status of a student's requirements, earned and unearned. You also can produce letters to communicate certification status to students in a program.
- Seven fields (Activity.UF_1 through UF_7) that can be user-defined and mapped to fields in the registration records. These fields allow the data to be preserved in the certification activity records.
- An option for both initial certification and subsequent maintenance requirements for your customers. The Certification module supports three Program Types:
- Standard - An initial certification period only
- Maintenance - An initial certification period followed by an ongoing maintenance portion with its own time and completion requirements
- Rotating - A maintenance portion only
- You can specify additional date requirements with each of these program types.
- For standard certification (includes initial certification only), specify begin and end dates or a completion time frame calculated from the date of enrollment.
- For maintenance portions, specify:
- Automatic enrollment, enrollment based on a set date, or enrollment following the previous period, and
- The length of the maintenance period.

  Using these criteria, iMIS automatically calculates the deadlines for completion. When you use a preset Begin Date for a maintenance period, the deadline is calculated as the Begin Date plus the length of the maintenance portion until the first subsequent date is reached.
- A purge routine lets you purge registration records. With this purge, you can specify which records to purge by Type, based upon several date fields, or by Status. In addition, there is an option to create activity records if you are purging component registrations.
- Activity records are created automatically for program registrations.

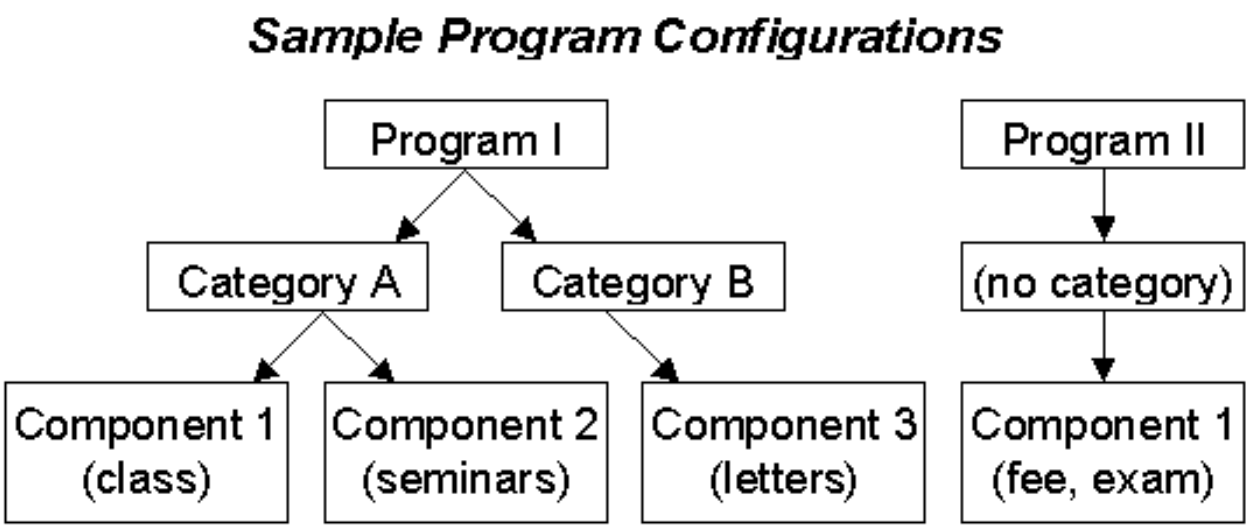
Standard Reports include a Program Completion List, Board Notification Report, Student Transcripts, and Student Notification Letters.

- The Program Completion List checks enrolled students for program completion and reports on those who have completed the program.
- The Board Notification Report and Student Notification Letters mark registration records as “board notified” and “student notified,” respectively, as of the report's run date.
- The Student Transcript allows for reporting on all aspects of the student's enrollment in a program. For example, a specific report on one student in one program, or a comprehensive report of all students/programs.

How Certification Works

The Certification module allows you to create several certification programs, each with a different set of completion criteria. For example, you can set up a simple program requiring customers to attend three of five available seminars over a specified time period, with each seminar defined as a certification component. Attendance at the seminar would be considered credit. You could also create a very complex program with 30 or 40 components and a three-year period for program completion.

An important feature of the Certification module is the ability it gives you to assign components to categories. For example, you can assign certain courses to Category A, others to Category B, and require students in a program to complete 20 hours of courses from Category A and 60 hours of courses from Category B.



Sample Program Configurations

Several standard reports help complete the certification process by informing customers of their progress or by notifying a regulatory board about customers who have successfully completed program requirements.

Navigation for Certification

To access the Certification task list, select Certification from the navigation bar located at the top of the iMIS window.

Register a student

Select this item to open a sub-task list of the following items:

- By program - Select this item to enroll a customer in a program.
- By component - Select this item to register a customer for a component.
- View component list and roster - View a roster of individual components.

Set up programs

Select this item to open the Set up programs window where you can create a new certification program or modify an existing one. You can define the title and description, admission prerequisites, the time restrictions for completion, and the components needed to complete the program.

Set up components

Select this item to open the Set up components window where you can define a component. Components are the reusable building blocks of certification. They define a requirement, such as a class or an exam, as well as the attributes of that requirement, including locations, instructors, and prerequisites.

Generate reports

Select this item to open the Generate reports window where you can generate reports, such as program descriptions, student rosters, and transcripts. Print these reports to screen, printer, file, or fax (by defining your fax device as the printer in Microsoft Windows™). You can modify report characteristics on the Detail Report Specifications window (select Utilities> Report Specs).

Set up tables

Select this item to open a sub-task list of the following items:

- Component categories - Select this item to assign category components.
- Subcomponents - Select this item to create and maintain subcomponents.
- Purge registrations - Select this item to purge registrant types.
- Delete canceled programs - Select this item to delete canceled programs.
- Delete closed programs - Select this item to delete closed programs.

Set up module

Select this item to open the Set up certification module window where you perform the basic system setup requirements to run the Certification module. You can define basic overall attributes of the Certification module, such as screen prompts and automatic deletion of programs or components.

Certification Registrations

You can register students for programs and components in the Certification module and in the Events module. This includes processing certification orders, issuing invoices, and making payments.

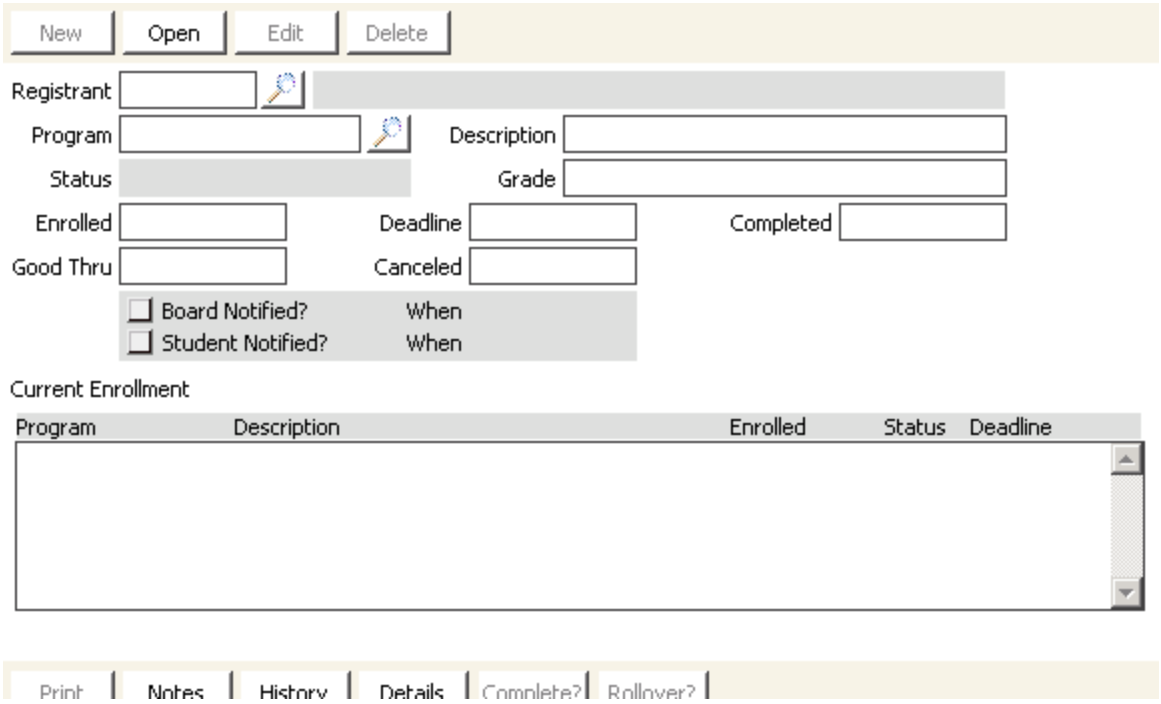
You can test for an individual student's completion of the program after students have completed the requirements for a program or a portion of a program.

Registering a Student for a Program

When a student has expressed interest in earning the certification offered by your organization, the first step is to enroll the student in the certification program. Enroll students in a program using the Register a student by program window.

> **Note:** Note: The student must have a customer record in the iMIS database to register for a program or a component.

Register a student by program window



Admin Console: Home > Certification > Register a student by program

Desktop: Certification > Register a student > By program

Registrant

(required) Specifies the customer ID of the individual registering for the program. You can click the lookup icon to select a value.

Program

(required) Specifies the program code. You can click the lookup icon to select a value.

Description

The system automatically populates the Description field with the program description entered on the Set up programs window.

Status

(read only) Displays the student's status in the selected program. Statuses:

- E - Enrolled
- C - Completed
- X - Canceled

Grade

(optional) Specifies the student's grade for the program.

Enrolled

This is the date the student began the certification program or the maintenance cycle. It defaults to the current system date or the date determined by the Optional Initial Date Calculation field on the Program Dates window. You can override this date.

Deadline

This is the date the student must complete the initial certification or maintenance requirements by the deadline date. This may or may not be required, depending upon the program requirements. It defaults to blank or to the date determined by the values set on the Set up programs window.

Completed

This is the date the student completed the program. The completed date is the date you run the completion test.

Good Thru

This is the date the program registration expires for the initial portion of a program. In the case of the program's maintenance portion, the Good Thru value determines the date that the certification expires if the maintenance requirements are not met. This may or may not be required, depending upon the program. The information in this field defaults to blank or to the date determined by the values set on the Set up programs window.

Canceled

This is the date that the program registration was canceled if the option Delete Program Registration at Cancellation is not selected. This option is shown on the Certification System Options window.

Board Notified? and When

The system automatically enables this field when you run the Board Notification Report.

Student Notified? and When

The system automatically enables this field when you run the Student Notification Letter Report.

Current Enrollment

Lists all program registrations and enrollment statuses for the selected ID. Select a specific program line to display the details on the Register a student by program window.

Notes

Opens the Registration Description window to enter detailed information about the registration, for example, special needs for the registrant or tutor information.

History

Lets you open the Activity window where the registrant's certification activity information is shown. You can edit activity information on the Activity window if you enabled the Allow user Edit option on the Set up activity types window (not recommended).

Details

Opens the Program Requirements window to view detailed information about the program category and component requirements. You can view high-level category or component information, or expand this information to see more detail. You can also register the individual for components or categories through this window.

Complete

Lets you perform a completion test on a single student. iMIS reviews the program's status, determining whether the student has met all the requirements of the program or the maintenance cycle. After you click the button, a message is displayed indicating whether the requirements have been met.

If a student has met all program requirements, the program registration is assigned a status of Complete and the Completion date is populated with the current system date. If the program is a maintenance program and you selected the Automatically Enter First and/or a Subsequent Maintenance Portion(s) option, a new program registration record is created for the student's first or next maintenance cycle.

Rollover

Lets you manually rollover a registrant to the maintenance portion of the program if you did not select the Automatically Enter First and/or Subsequent Maintenance Portion(s) maintenance option on the Program Dates window. This creates a new program registration record for the student's first or next maintenance cycle.

To enroll a student in a program

To enroll a student in a program or a component, the student must have a customer record in the iMIS database.

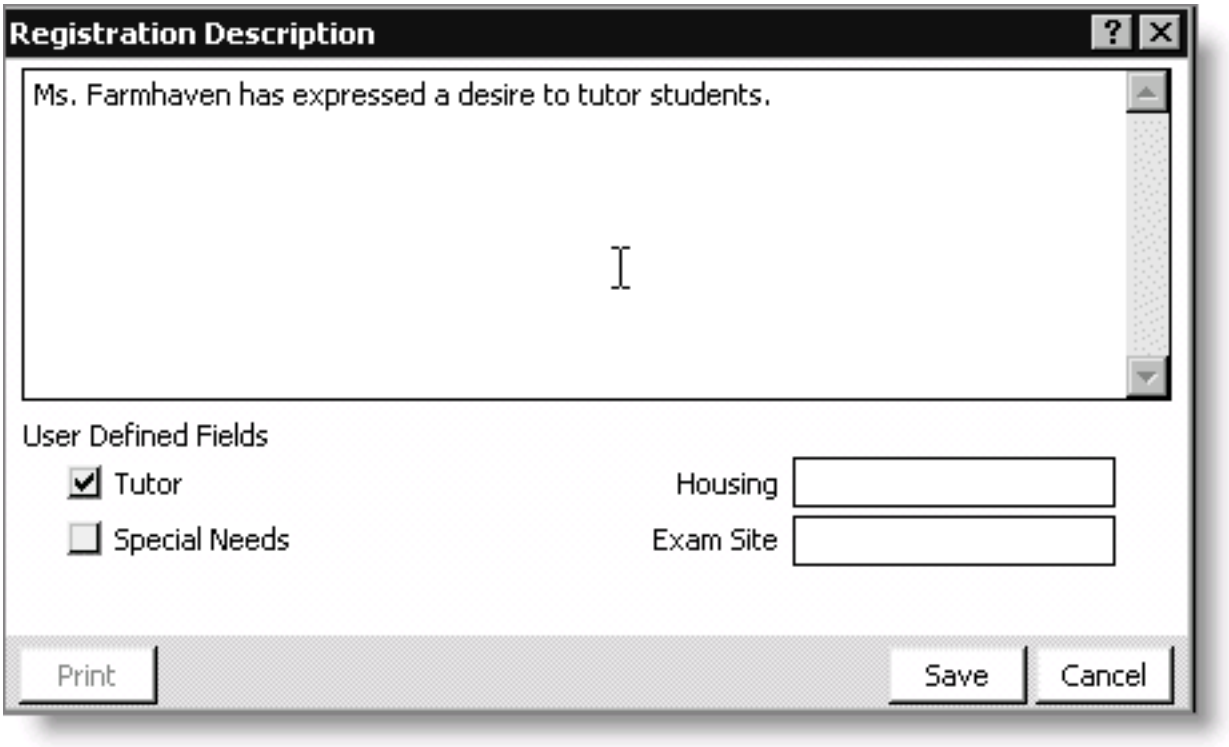
1. From Register a student by program or Register a student by component window, click New.
2. Enter the customer ID of the student registering for the program in the Registrant field.
3. Press Tab.
4. Enter the program code in the Program field, or click the lookup icon to select a program. The Description, Status, Enrolled, Deadline, and Good Thru fields automatically fill with the program data.
5. Click Save.

   Note: To Register a student by component choose Register a student by component from

Adding Program Notes

You can maintain additional data about a specific registration record by entering notes on the Registration Description window.

Registration Description window



From Certification, select Register a student> By program, find a registrant, select a program, and click Notes

This window provides a large text area for entering incidental information about the program registration. The user-defined prompts you created in the Set up module window display in this window.

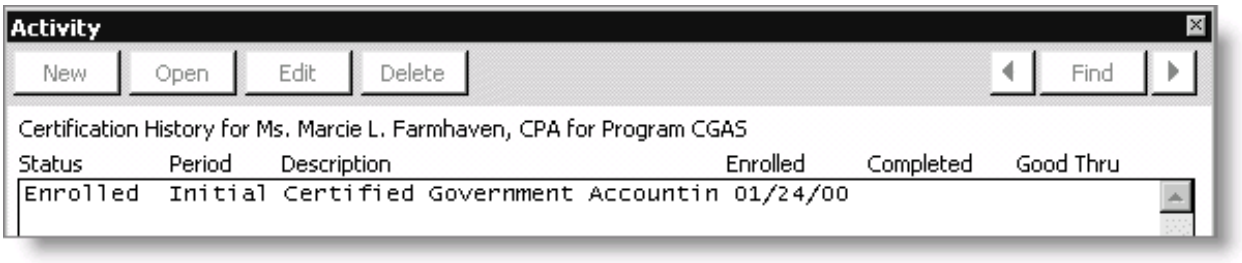
To add registration notes

1. From Certification, select Register a student> By program to open the Register a student by program window.
2. Click Open and enter a customer ID in the Registrant field.
3. Click Save. The registration record is shown.
4. Select the program registration.
5. Click Edit.
6. Click Notes to open the Registration Description window.
7. Update the window as needed.
8. Click Save to return to the Register a student by program window.
9. Click Save.

Viewing Certification Activity Records

View and edit a registrant's certification activity (history) records on the Activity window. You also can view these activities through the Manage customers window in the Customer Management module. Certification activity records are created when an individual registers for a program or when component registration records are purged.

Activity window



From Certification, select Register a student> By program> find a registrant, select a program, and click History

To view a registrant's certification activity

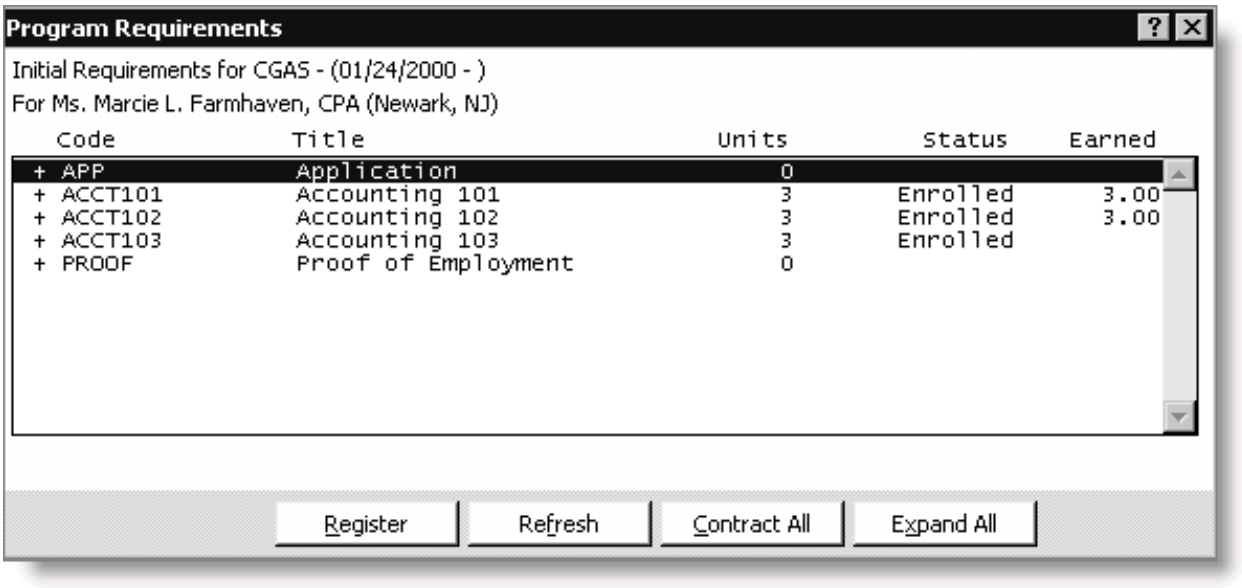
1. From Certification, select Register a student> By program to open the Register a student by program window.
2. Click New.
3. Enter a Registrant, or click the lookup icon to select an ID.
4. Enter a program, or click the lookup icon to select a program.
5. Click Save.
6. Click History. The Activity window opens, allowing you to view the student's registration record.
7. Double-click an activity to open the Activity Detail window.

Viewing Student Program Details

View a student's progress in a program through the Program Requirements window. This window displays program requirements (categories/components), student status for categories/components (enrolled or completed), and the number of units earned.

Only high-level information is displayed on the window when it is first opened - categories and components not assigned to a category. However, if you click Expand All at the bottom of the window, you can see the individual components attached to each category requirement.

Program Requirements window



From Certification, select Register a student> By program, find a registrant, select a program, and click Details

Code

An abbreviation for the category or component required for the selected program

Title

Title of the category or component required for the selected program

Units

The number of units required for completing the category or component

Status

The status of the category or component as it relates to the selected program

Earned

The number of units earned for the category or component

Register

Opens the Register a student by component window to enter or edit registration information for the selected component.

Refresh

Refreshes the information that is shown on the Program Requirements window.

Contract All

Lets you contract the information for each of the categories or components.

Expand All

Expands the information for each of the categories or components.

Using the Register a student by program window

You can process component registrations directly from the Register a student by program window. Use this window to register students for components if they are registering for components along with the program. For example, a student may send the application fee and proof of employment along with a program registration. This saves you the step of going from the Register a student by program window to the Register a student by component window to register the student for a component.

To register for a component using Register a student by program

1. From Certification, select Register a student> By program to open the Register a student by program window.
2. Click New.
3. Enter the Registrant, or click the lookup icon to select the ID of the individual registering for the component.
4. Enter the code for the program in the Program field, or click the lookup icon to select a program. The Description automatically is shown.
5. Click Save.

6. Click Details to open the Program Requirements window. A list of categories and components is shown.
7. Select a category and double-click on it, or click Expand All to display all components for all categories.
8. Select a component and click Register. The Certification Component Registration window opens. If the component is marked Tie to Program, the system automatically populates the Program field. If the component is not marked Tie to Program, the Program field is blank. If you enter a Program Code, the component behaves as if it marked Tie to Program.

   Note: If you attached a subcomponent to the component, the Select Appropriate Subcomponents window opens when you register the student for the component.
9. Tab through the Component field to display the Description:

   Note: Components created with Skip Enrollment enabled will be automatically completed.
10. Click Save to register the individual and return to the Program Requirements window.
11. Continue to register for each component.

    Note: Components with a fee will automatically prompt you to create an order.

    After all components are registered, the student is registered for the program as well as the components.

    To view program details

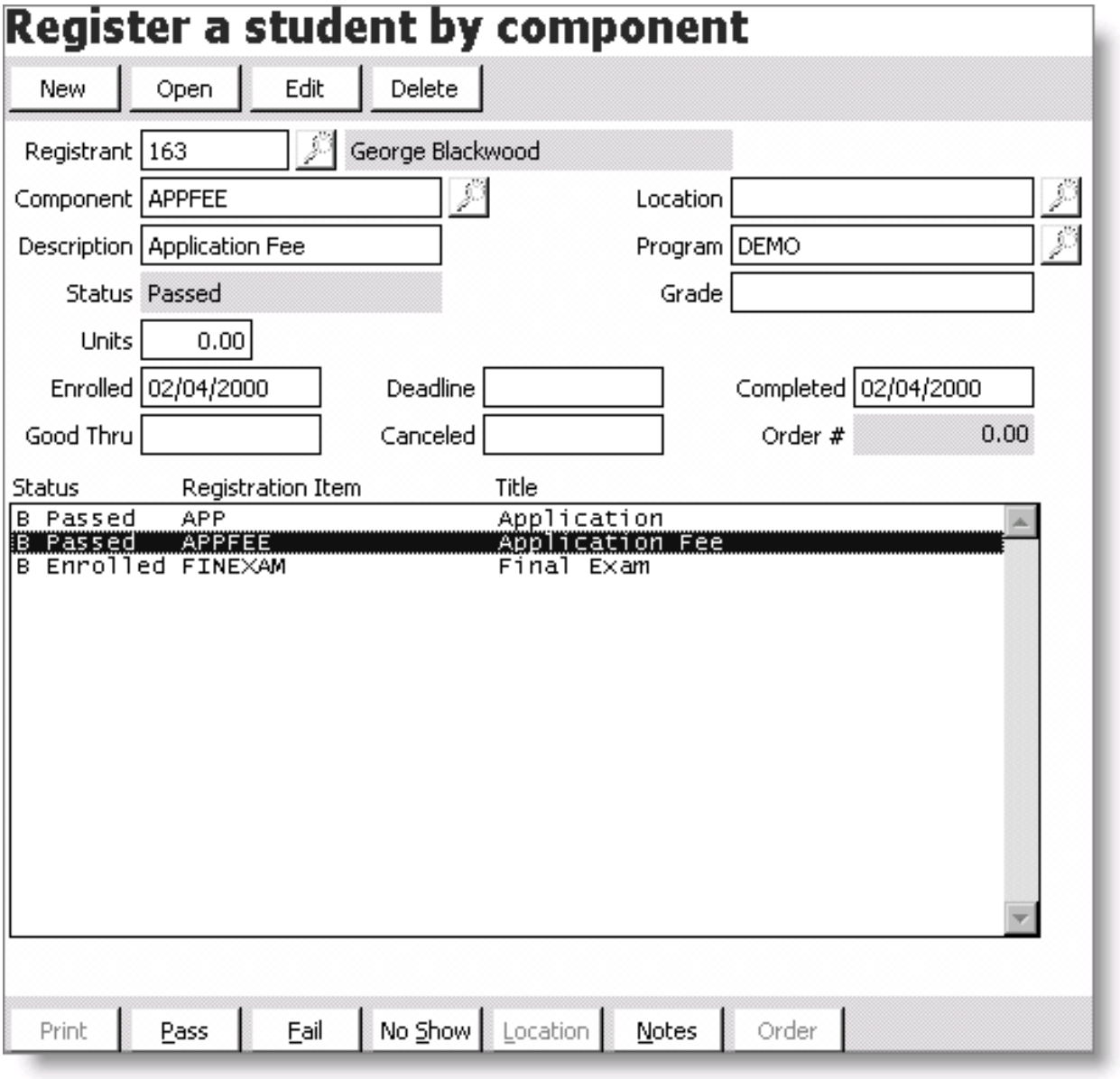
1. From Certification, select Register a student> By program to open the Register a student by program window.
2. Click Open.
3. Enter a Registrant, or click the lookup icon to select an ID.
4. Select the program you want to view.
5. Click Details to open the Program Requirements window.

6. Click Expand All to view all expanded categories.
7. Double-click the category line item to view only one expanded category.

   Note: If you have enabled the Suppress Non-completion Program Details option on the Certification System Options window, iMIS displays only minor details. If you have sub-components attached to a component, the subcomponents display.

Using the Register a student by component window

Although you can access the Register a student by component window through the Register a student by program window, you also can access the window directly from the Certification menu (from Certification, select Register a student> By component).



From Certification, select Register a student> By component, find a registrant

Registrant

Specifies the ID of the student you are registering for the component. To register a student for a component, the student must have a record in the customer database.

Component

Specifies the code of the component for which you are registering the student.

Location

(optional) Use this field to identify the Location code for this occurrence of the component. This value is specified when the component is defined. You can click the lookup icon on the field to select a value.

Description

The system automatically populates this field with the description associated with the component code entered on the Set up components window

Program

(optional) Specifies the program code for the program associated with this component. You can click the lookup icon on the field to select a value.

> **Note:** Note: You must enter a Program Code if you want the component to “tie to” a program.

Registration Type

The Registration Type is shown immediately to the left of the Status on the display window. Registration types include the following:

- B - Specifies that the registration is for a component that is tied to a program
- C - Indicates that the registration is for a component that is not tied to a program

Status

(read only) The Status field displays the student's status for the selected component. Status types include the following:

- E - Enrolled
- P - Passed
- F - Failed
- N - No Show
- X - Canceled

Grade

(optional) Specifies the grade that the student receives for the course (component) after completing it. You enter the grade manually.

Units

The Units field automatically fills with the number of units the student earns for completing the component. You can override this number, if necessary.

Enrolled

Defaults to the system date when a component registration is processed. You can override this if necessary.

Deadline

The Deadline is the date by which the student must complete the component requirements. You enter this manually, if it is required.

Completed

Displays the date when the student completed the component. It is filled with the system date when the component moves to a Passed status.

Good Thru

Displays the date that the component registration expires. You enter this manually, if it is required.

Canceled

Displays the date that the component registration was canceled. This field is not used if you enable the Delete Component Registrations at Cancellation option on the Certification System Options window.

Order#

Displays the certification order number.

To register for a component using Register a student by component

You can register individuals for components with or without registering them for a program.

1. From Certification, select Register a student> By component to open the Register a student by component window.
2. Click New.
3. Enter a Registrant, or click the lookup icon to select an ID.
4. Enter a Component, or click the lookup icon to open the Component Find window where you can select a component from the list of components.
5. Press Tab. The Description field automatically fills with the description that was entered on the Set up components window.
6. Press Tab and enter the Location, or click the lookup icon to select a value.
7. Press Tab and enter the Program code, or click the lookup icon to select a value.
8. Click Save.
9. Repeat steps to register the student for all the program components.

To cancel a component registration

1. From Certification, select Register a student> By component to open the Register a student by component window.
2. Click Open.
3. Enter the Registrant, or click the lookup icon to select a customer ID.
4. Select the component you want to cancel.
5. Click Delete. A message is displayed asking you to confirm the deletion.
6. Click Yes.

Depending upon your system settings, iMIS marks the component with an X for canceled or deletes the record. In either case, you must reverse the accounting transaction manually.

Assigning Pass, Fail, and No Show to a Registration

You can revise the status of a component after you complete the initial registration. For example, a student can enroll in an exam, but until the student actually takes the exam and passes or fails, you cannot record the status information. In addition, if the student does not show up to take the exam, you cannot record the no-show status until after the exam occurs.

The Pass, Fail, and No Show buttons at the bottom of the Register a student by component window allow you to revise the status of a component after the original registration is completed.

After you click Pass for a component, Passed is shown on the window. This indicates that the student has met all of the requirements for this component.

> **Note:** Note: Click the Pass, Fail, or No Show buttons only for components that do not have the Skip Enrollment option enabled.

To assign a pass, fail, or no show status to a registration record

1. Enter a component registration on the Register a student by component window.

   Note: Be sure that you did not enable the Skip Enrollment option for this component.
2. Select the line item and click Pass.
3. Complete edits to the component registration. For example, enter a Grade.
4. Click Save to update the record. The status of the line item changes to Passed.

Entering a Component Order

You can process certification orders if a component registration has a price associated with it. You can process payments, issue invoices, and ship materials for a certification

program. This section explains how to process a component registration that requires order processing.

To process a component order, you must have selected the appropriate option on the Certification System Options window:

- If you selected Suppress Creation of all Certification Orders, the Create an Order window does not display for any component registrations.
- If you selected Suppress Creation of $0 Order Only, the Create an Order window opens for component registrations that have a price associated with them.
- If you did not select either option, the Create an Order window opens for every component registration.

To enter a component order

1. From Certification, select Register a student> By component to open the Register a student by component window.
2. Click New.
3. Enter the ID of the individual registering in the Registrant field, or click the lookup icon to select an ID.
4. Enter the code of the component for which you are registering the student in the Component field, or click the lookup icon to select a component.
5. Tab to the Program field and enter the name of the program for which you are registering the student, or click the lookup icon to select a program.
6. Click Save. The Create an Order window opens because there is a fee associated with this component.
7. Click Save. A message is displayed informing you the order was created.
8. Click OK to return to the Register a student by component window. The Order # field displays the order number for the registration.

To enter and make a payment on a component order

1. From Certification, select Register a student> By component to open the Register a student by component window.
2. Enter a component order.
3. Click Payment on the Create an Order window. The Order Payment window opens.
4. In the Check/CC field, enter a check number or credit/debit card code and enter the required card information.
5. Enter the amount of the payment in the Payment Amount field.
6. Click OK on the Order Payment window.
7. Click Save on the Create an Order window. A message is displayed informing you the order was created.
8. Click OK. The system populates the Order field with the order number.

Note: Do not click Cancel on the Create an Order window unless you do not want to process the order. You must cancel the component registration and re-register in order to generate an order.

To print invoices for certification orders

1. From Certification, select Generate reports to open the Generate reports window.
2. Select Orders from the Report Types list.
3. Select Print New Invoices from the list of Available Reports.
4. Click Run.

Entering a Payment

Payments for certification components can be made after the order has been entered and before the order is invoiced in either the Orders or AR/Cash module.

The Enter and edit cash receipts window in the AR/Cash module enables you to enter a payment for an order after it has been invoiced.

When you select the Payments tab on the Enter and edit orders window in the Orders module, you can enter a payment after the order has been added, but before the order is invoiced.

To make a payment on an invoiced order

If you do not process a payment with a component registration, the order must be invoiced before a payment can be applied through AR/Cash. Payments entered in this manner update the order total payments and balance. From AR Cash, select Enter and edit transactions> Cash receipts to find the order and enter a payment.

After an order has been invoiced, it no longer can be edited. You must make payments on already-invoiced orders on the Enter and edit cash receipts window.

1. From AR/Cash, select Enter and edit transactions> Cash receipts to open the Enter and edit cash receipts window.
2. Click New.
3. Tab to Invoice Number and enter the invoice number for the order. The system automatically populates the ID field.
4. Enter a check number or credit/debit card code in the Check/CC field, enter the required card information, and press Tab.

   Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.
5. Enter a Payment Amount and press Tab.
6. Double-click on the line item for the certification order.
7. Click Save to save the payment.

   Note: You must print the invoice before you can apply the payment through the AR/Cash module.

Viewing and Editing Certification Orders in AR/Cash and Orders Modules

If a component registration order exists, you can view or edit it on the Enter and edit orders window in the AR/Cash (simple order entry) or Orders (full order entry) module. However, you cannot edit an order after it has been invoiced.

To view and edit an order through AR/Cash

1. From AR/Cash, select Enter and edit orders to open the Enter and edit orders window.
2. Click Open.
3. Enter the Order number for the certification order, or click the lookup icon to select an order.
4. Click OK.
5. To edit the order, click Edit and place your cursor in the field to edit. Because the product code is not set up in the Product Codes table, tabbing through this field will display the Product Find window.
6. Click Save to update the order.

To view an order through Orders module

1. From Certification, select Register a student> By component to open the Register a student by component window.
2. Click Open.
3. Enter the Registrant and press Tab.
4. Select a line item.
5. Click Order. The registrant's order information is displayed in the Orders Portfolio.

To edit an order through Orders module

1. From Orders, select Enter and edit orders to open the Enter and edit orders window.

2. Click Open.
3. Enter the Order number for the certification order, or click the lookup icon to select an order.
4. Click Edit and place your cursor in the field to edit. Because the product code is not set up in the Product Codes table, tabbing through this field will display the Product Find window.
5. Click Save to update the order.

Processing Component Registrations using Events

The Certification module integrates with the Events module by allowing you to tie the continuing education units (CEUs) awarded in your events to certification components. After you update attendance for the event function and close the event, iMIS creates certification component records for the linked events.

The first step in this process is to create a link between the component courses and an event. For example, a student earns CEUs by attending an event function. To process component registrations through the Events module, you must do the following:

1. Create an event function for one of the program components.
2. Create links between components and event functions.
3. Process an event function registration.
4. Update attendance.
5. Close the event. Students do not get CEU credits until after the event is closed.

To link a CEU component with an event function

1. From Events, select Define an event to open the Define an event window. This window displays a list of the events that have been defined.
2. Double-click the appropriate event. The Define an event window (detailed) opens.
3. Click More and select CEU to display the Event Function Definition - CEU window.

4. Click Edit.
5. Enter the component code in the CEU Type field or click the lookup icon to display the Select a Value window to select from a list of all components.
6. Enter the number of units of credit for this component in the Hours/Points field.
7. Click Save.

To update attendance in Events

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit next to the list of functions to open the Event Function Detail window.
4. Click Cancel.
5. Click More, and select CEU to open the Event Function Definition - CEU window.
6. Click Update Attendance to open the Function Attendance window.
7. Mark the registrants as attended. You have two options:

- Click Mark All Attended to select all the registrants, click Yes, and then double-click the registrants who did not attend the function to mark them as absent.
- Double-click each registrant individually to mark them as attended.

8. If you make mistakes or lose track of your changes, return all individuals to the unmarked status:

- Click Mark All Absent.
- Click Yes.
- Start over with the attendance marking.

To close the event and generate CEU activity records

After you update attendance, close the event. By closing the event, you create certification component registrations for each of the registrants who attended a function that you linked to Certification. These registrations are marked Passed.

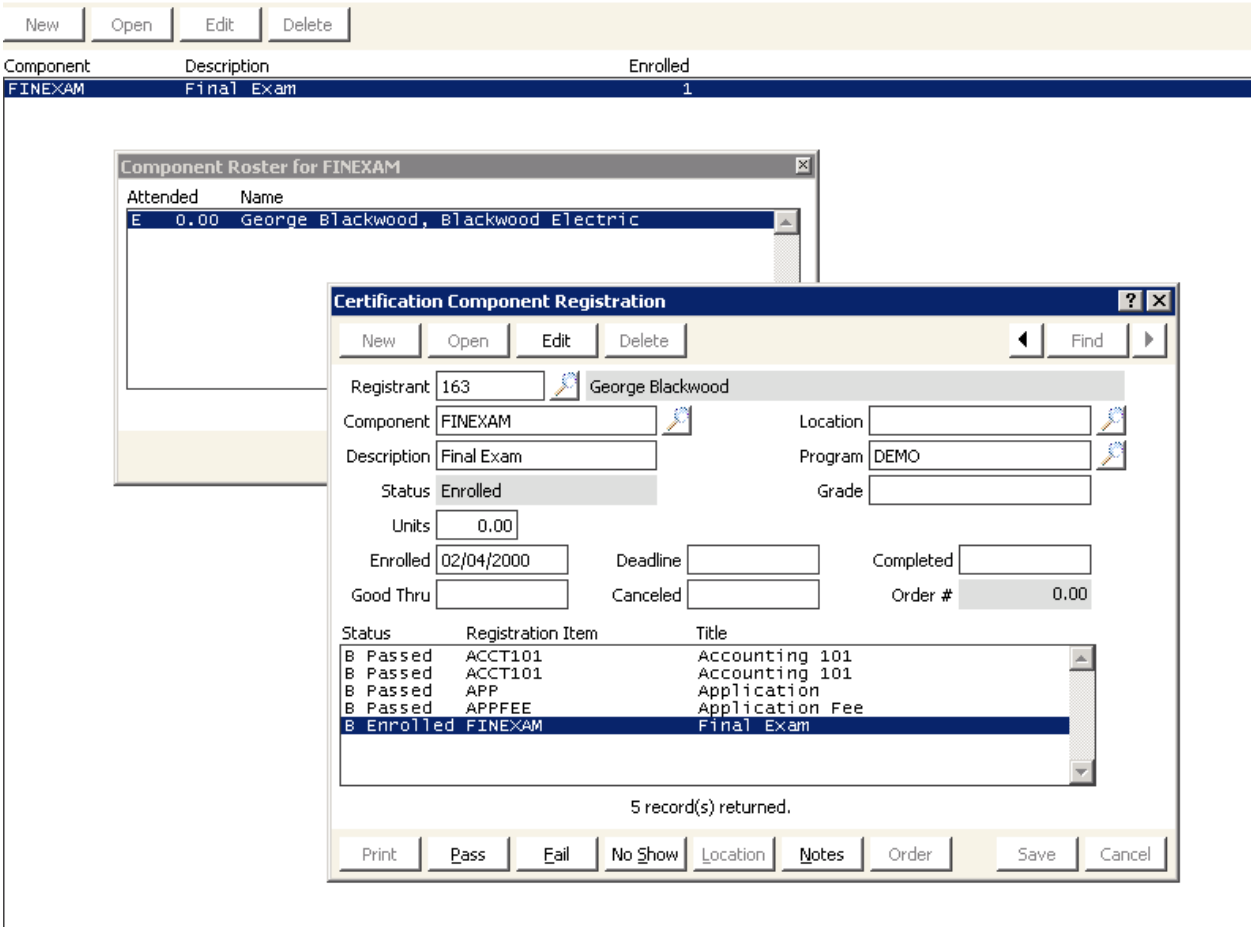
1. From Events, select Define an event to open the Define an event window.
2. Double-click the event.
3. Click More and select Close Current Meeting from the list of options.

   A message informs you that the meeting has registrants and asks if you want to close the meeting and create Activity Records.
4. Click Yes. A message is displayed asking you confirm that you want to close the event.
5. Click Yes. Another message is displayed informing you that closing the current event will remove all event details and create history.
6. Click Yes. The event is closed. iMIS generates MEETING activity records for each of the event registrants as well as CEU activities for those registrants with a CEU function.

To view component registrations

1. From Certification, select Register a student> By component to open the Register a student by component window.
2. Click Open.
3. Enter a customer ID in the Registrant field. The record is displayed.
4. Select a component in the display area of the window. Information about that component is displayed in the top half of the window.

View rosters by component window



Admin Console: Home > Certification > View rosters by component

Desktop: Certification > Register a student > View Component List and Roster

> **Note:** Note: Event functions and CEU components must be linked manually.

To view CEU activity records after closing an event

After you close an event, you can view the CEU activity records on the Activity window.

1. From View rosters by component window, click Find and enter a customer ID in the Equals field. The customer record is displayed.
2. Select the Activities-All tab.
3. Double-click the CEU activity to open the Activity Detail window.

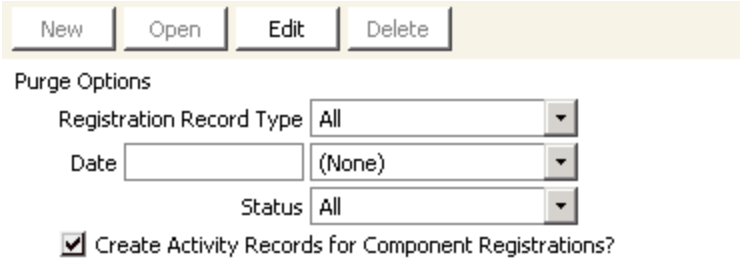
Purging Certification Registration Records

iMIS creates component activity records when you purge registrations. You may purge component or program registrations as needed to delete old records or to create activity records. You can select records three ways:

- By type
- By specific dates stored in the certification record
- By status

Select the options from the drop-down list attached to each field.

Purge registration window



Admin Console: Home > Certification > Purge registration
Desktop: Certification > Set up tables > Purge registrations

Registration Record Type

Use this drop-down list of options to specify the type of registration record you want to purge:

- All - Specifies that all registration records are purged by the procedure
- Component - Specifies that only component registrations are purged by the procedure
- Program - Specifies that only program registrations are purged by the procedure

Date

(optional) Use the Date field to enter a date stored in the Certification system. The Date field works with the drop-down menu to its right - you must select an option from the drop-down list.

Status

Use this drop-down list to select the status of the records you want to purge:

- All - All records of the type selected
- Completed - Only the completed records for the type selected
- Canceled - Only the canceled records for the type selected
- Failed - Only the records of individuals who failed the component
- No Show - Only the no show records for the type selected

Create Activity Records for Component Registrations

This option allows you to create CERTIFICAT activity records for any component registration that you are purging. For example, if you select the Component type and the All status, you will purge all component registrations and generate activity records for them all. This option overrides the option's setting on the Certification System Options window.

To purge certification records

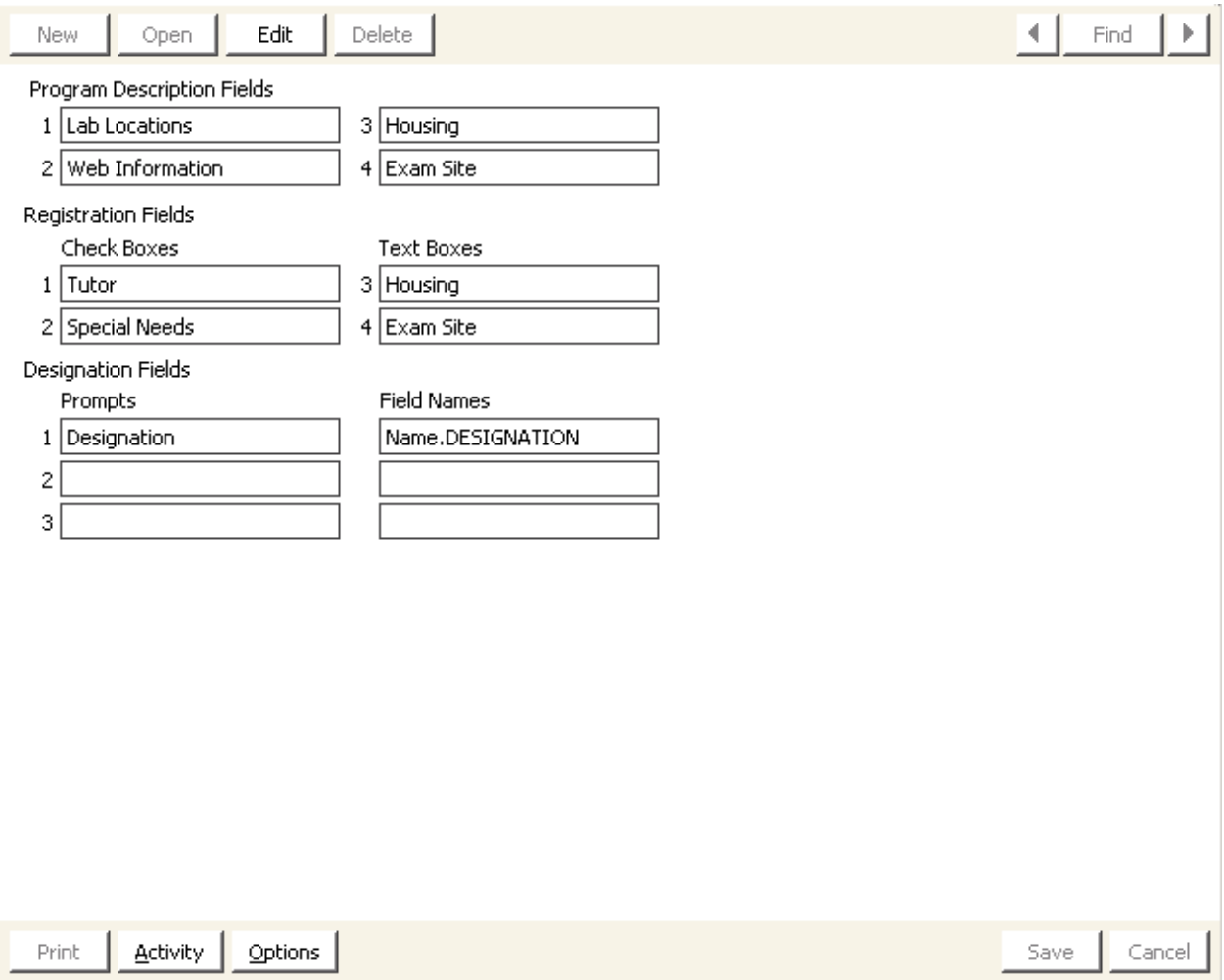
1. From Purge registration window, click Edit.
2. Select a Registration Record Type.
3. Enter a Date, if applicable.
4. Select an option from the Status drop-down menu.
5. Select the Create Activity Records for Component Registrations checkbox, if applicable.
6. Click Save. A message is displayed asking you to confirm the purging of the registration records.

7. Click Yes. Another message is displayed informing you of the number of rows that will be purged and asking you confirm the process.
8. Click Yes.

System Setup: Certification

iMIS gives you a significant amount of flexibility to design certification programs. Several setup windows assist you in tailoring the system to your organization's needs.

Configure certification options window



Admin Console: Configure > Certification > Configure certification options

Desktop: Certification > Set up module

Activity

Opens the Certification Activity Setup window where you can map additional user-specified fields to certification activity records, and specify up to seven additional certification-related data fields (three character fields, two numeric fields, and two date fields) to add to the certification-generated activity fields

Options

Opens the Certification Systems Options window where you can set the global Certification module system options.

Program Description Fields

In this area of the window, activate up to four user-defined, program-related fields. Assign purposes and labels to any of these fields according to your needs. If you define a user prompt in one of the Program Description Fields, the field is shown on the Program Description window.

Registration Fields

In this area of the window, activate up to four user-defined, registration-related fields. You can create two checkboxes and two text fields. If you define a user prompt in one of the Registration Fields, the field is shown on the Registration Description window.

Designation Fields

In this area of the window, activate up to three fields to display on the Register a student by program window and on the Register a student by component window. These fields will be used to define the specific designations to be awarded for program completion.

In addition, you can specify the field to be updated in the customer's record when the program is complete, for example, Name.DESIGNATION. After the completion test is performed and the program is marked complete, iMIS automatically inserts or appends the new designation in the customer's record.

> **Note:** Note: If a field is set as a user-defined field on a table that is not Always Create, and does not have a record for the registered member, the designation is not updated when the program is closed.

Setting up User-Defined Fields

To set up user-defined fields

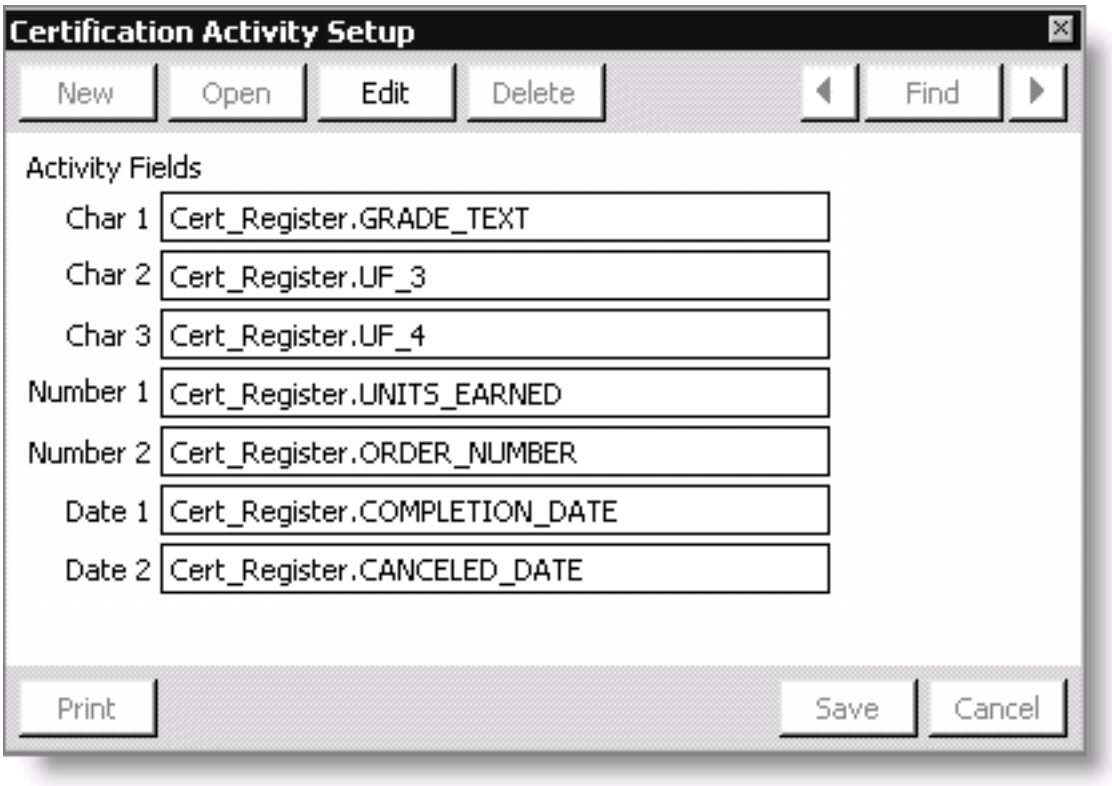
1. From Configure certification options window, click Edit.
2. (optional) Enter the fields to display on the Program Description window in the Program Description Fields section.
3. (optional) Enter the fields to display on the Registration Description window in the Registration Fields section. This can be additional information you want to retain about registrants.
4. (optional) Enter the designation prompts and the applicable field names in the Designation Fields section.
5. Click Save.

Defining Activity Fields

You can map additional user-specified fields to certification activity records, and specify up to seven additional certification-related data fields (three character fields, two numeric fields, and two date fields) to add to the certification-generated activity fields:

- Program activity records are generated when an individual initially registers for a certification program, or when the individual is enrolled in subsequent maintenance periods for that program.
- Component activity records are created at the time the component registration records are purged if this option is specified during system setup.

Certification Activity Setup window



From Certification, select Set up module, and click Activity

To define Activity fields

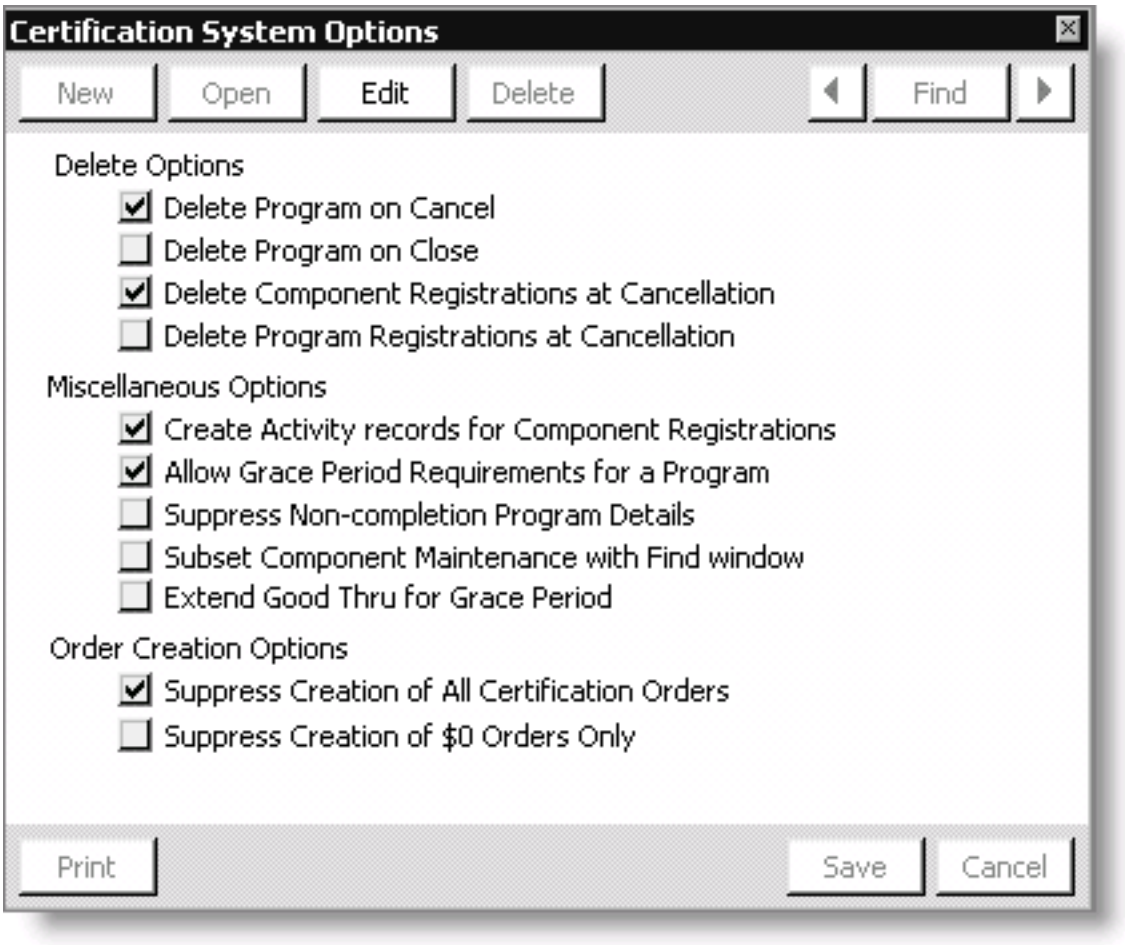
1. From Certification, select Set up module to open the Set up certification module window.
2. Click Activity to open the Certification Activity Setup window.
3. Click Edit.
4. Enter the activity information you want to maintain in the Activity Fields.
5. Click Save.
6. Restart iMIS.

Defining Certification Options

After setting up user-defined fields and activity fields for tracking additional certification activities, you must define the global options for the Certification module on the Set up

certification module window.

Certification System Options window



From Certification, select Set up module, and click Options

Delete Options

- Delete Program on Cancel - If you select this checkbox and cancel a certification program, the program is no longer available on the Set up programs window. If you clear this checkbox and cancel a program, the program will be available on the Set up programs list and have a status of X for canceled.
- Delete Program on Close - If you are processing registrations for certification programs that will be closed eventually, this checkbox determines whether iMIS should maintain the summary detail when you close the program or completely delete all program

records. If you select this checkbox and cancel a program, the program is no longer available on the Set up programs window. If you clear this checkbox, the program will be available on the Set up programs list and have a status of C for closed.

- Delete Component Registrations at Cancellation - This checkbox determines how iMIS handles canceled certification component registrations. If this checkbox is selected, the component registration record is deleted when an individual cancels a component registration. If this checkbox is cleared, the component registration record remains and is assigned a status of X for canceled.
- Delete Program Registrations at Cancellation - This system checkbox determines how iMIS handles canceled certification program registrations. If this checkbox is selected, the program registration record is deleted when an individual cancels from a program. If this checkbox is cleared, the program registration record remains and is assigned a status of X for canceled.

  Note: If you close a program, the program is assigned a status of C. In addition, if you enable the Delete Program on Close checkbox on the Certification System Options window, the program setup is purged and the program no longer is available to be cloned from the Set up programs window. However, program and component registration records are retained until they are purged manually.

  If you cancel a program, the program is assigned a status of X. In addition, if you enable the Delete Program on Cancel checkbox on the Certification System Options window, the program setup is purged and the program no longer is available to be cloned from the Set up programs window. However, program and component registration records are retained until they are purged manually.

  Miscellaneous Options

- Create Activity records for Component Registrations - If this checkbox is selected, activity records for component registrations are created when registration records are purged. If it is cleared, the activity is not created.
- Allow Grace Period Requirements for a Program - This checkbox allows you to add a grace period requirement for students who do not meet the maintenance requirements of

a program. For example, if participants must complete the program requirements within three years, but they do not fulfill the requirements during that time, they may be able to get a deadline extension for an additional fee. The extension is a Grace Period and the fee is a Grace Period requirement.

- Suppress Non-completion Program Details - If you select this checkbox, details about a program are suppressed on the Program Requirements window of a registration. You can view only the high-level requirements and cannot expand the detail. This window displays the program's category and component requirements, indicating in which category or component the student is enrolled, or which ones the student has completed. This has no effect on the Program Requirements window under Program Maintenance.
- Subset Component Maintenance with Find window - Activates the Component Find window each time you open the Set up components window.This allows you to look up components for maintenance or registration by Component ID, Title, Category, Location, or by an Ad hoc Search.
- Extend Good Thru for Grace Period - This checkbox works hand-in-hand with the Allow Grace Period Requirements for a Program checkbox. When a student is allowed to extend the deadline into a grace period, the Good Thru date remains unless you select this checkbox. If you do, the Good Thru date is extended, along with the Deadline Date.

  Order Creation Options

- Suppress Creation of All Certification Orders - To handle accounting transactions created by fees processed as part of a certification program, iMIS uses order processing to create orders and to capture these payments. This checkbox turns off all order creation for component registrations.
- Suppress Creation of $0 Orders Only - Similar to the Suppress Creation of all Certification Orders, this checkbox turns off order creation for component registrations that do not have a cost associated with them.activity type will not be created.

  To define Certification options

1. From Certification, select Set up module, and click Options to open the Certification System Options window.
2. Click Edit.
3. Select the appropriate Delete Options.
4. Select the appropriate Miscellaneous Options.
5. Select the appropriate Order Creation Options.
6. Click Save.

To enable Subset Component Maintenance with Find window option

1. From Certification, select Set up module to open the Set up certification module window.
2. Click Options. The Certification System Options window opens.
3. Click Edit.
4. Select the Subset Component Maintenance with Find window option.
5. Click Save.

Creating Certification Activity Types

There are three activity types tracked by the Certification module:

- CERTIFICAT - The CERTIFICAT activity record is created when an individual enrolls in a program, or when you purge component registrations if you enabled the Create Activity records for Component Registrations option on the Certification System Options window. The CERTIFICAT activity record also is created for the speaker and/or provider of a component when the first registrant for that location passes the component.
- CERTIFY - The CERTIFY activity records are created only for components and only when certification orders are invoiced.
- CEU (used with the Events module) - The CEU activity record is generated when an event is closed that contained a function that had CEUs activated, and the attendance was updated.

To create an activity type for Certification

1. Select Customers, select Set up module> Activity types to open the Set up activity types window.
2. Click New.
3. Enter the activity type code in the Type field.
4. Enter a brief description of the activity type in the Description field.
5. Enter additional information about the activity type in the appropriate fields.
6. Click Save.

Certification Table Maintenance

There are two tables to maintain for iMIS Certification:

- Component Categories Table
- Subcomponent Maintenance

Certification Set up tables submenu

Component categories

Select this item to open the Set up component categories window to enter and edit program categories.

Subcomponents

Select this item to open the Set up subcomponents window to enter and edit subcomponents.

Purge registrations

Select this item to open the Purge registrations window to select all registrations, some registrations, or one registration to purge.

Delete canceled programs

Select this item to delete all canceled programs.

Delete closed programs

Select this item to delete all closed programs.

Defining Component Categories

In order to group components by categories, first you must define the categories. Components are grouped by category in much the same way a university department lists courses. For example, a student may be required to complete six hours of a particular category, such as Accounting, Economics, or Electives to complete a program. Within that category are a group of courses the student can choose from to complete the required number of category hours, such as Beginning, Intermediate, and Advanced Accounting.

> **Note:** Note: A component may belong to one and only one category.

Use the Set up component categories window to set the default information for component categories.

To create a component or combo category

1. From Certification, select Set up tables > Component categories to open the Set up component categories window.
2. Click New.
3. Enter a Code for the category.
4. Enter a brief Description of the category.
5. Enter the number of Units Required for completion of the category.
6. Select the Make this a combo category option, if this is a combo category.

- Select the available categories that are part of the combo category.

  Note: Make sure that all of the categories included in the combo category are selected before you save the combo category information.

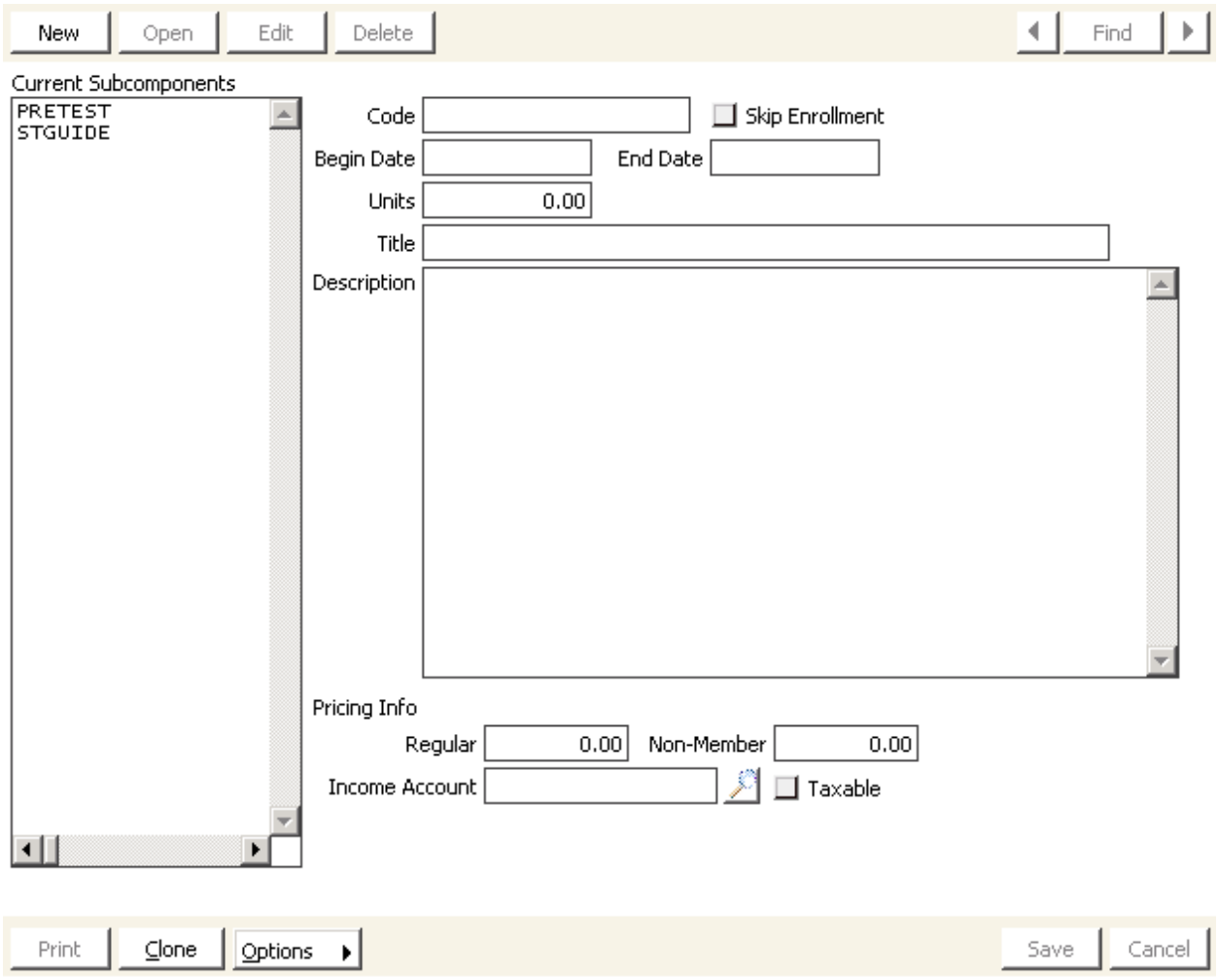
7. Click Save.

Creating Subcomponents

Just as some categories require components for completion, components can require subcomponents for completion. Subcomponents are the smallest grouping of certification requirements. For example, before you can get credit for completing a course, you may have to successfully complete a post-test or a study guide.

Subcomponents are defined on the Set up subcomponents window.

Set up subcomponents window



Admin Console: Configure > Certification > Set up tables > Set up subcomponents

Desktop: Certification > Set up tables > Subcomponents

Current Subcomponents

List of current subcomponents

Code

(required) Specifies the primary abbreviation or identification code to represent this subcomponent.

Skip Enrollment

Select this option to specify subcomponents that do not require the student's attendance, such as fees or an application. If you enable this option, the subcomponent's status is set immediately to Passed when the student registers for the subcomponent.

Begin Date, End Date

(optional) Use these fields to specify the begin and end date for a subcomponent. For example, a two-day study session beginning on Monday would have Monday's date in the Begin Date field and Tuesday's date in the End Date field.

Units

(optional) Specifies the number of units a customer receives for completing the subcomponent.

Title

Specifies a short descriptive title for this subcomponent, which is displayed on the Program Details window and the Student Transcription report.

Description

(optional) Specifies a lengthy note, description, or comment related to the subcomponent. You can enlarge this scrolling text field by pressing Ctrl+Z.

Pricing Info

In the Pricing Info area of the window, specify the cost of a subcomponent for members and non-members, and a G/L account number. When you register a student for a subcomponent with fees, an order is created. The transaction flows down to the iMIS G/L interface.

Regular

Specifies the default unit price (or member price) to be applied automatically when a student enrolls in the subcomponent. You can override this default price when you enter a subcomponent.

Non-Member

Specifies the non-member price. This price applies automatically when anyone with non-member status enrolls in the subcomponent. This option allows you to avoid most of the manual price overrides.

Income Account

Use this field to identify the General Ledger income account to credit when sales entries are made for this component. You can click the lookup icon to select an income account.

> **Note:** Note: You do not have to establish G/L accounts if you are not using the iMIS Financial (G/L) interface. If you leave this field blank, iMIS records this entry in the account you designated in the AR/Cash Default Accounts window.

Taxable

The Taxable checkbox is selected by default, indicating that the subcomponent is subject to sales tax. Click the checkbox to clear it, reversing the automatic taxation for the component.

Taxable (Canadian)

> **Note:** Note: Canadian taxation options are not applicable to the Certification module.

Print

Generates and prints a Component Description report for the selected subcomponent.

Clone

Opens the Component Code window to clone the selected subcomponent.

Options

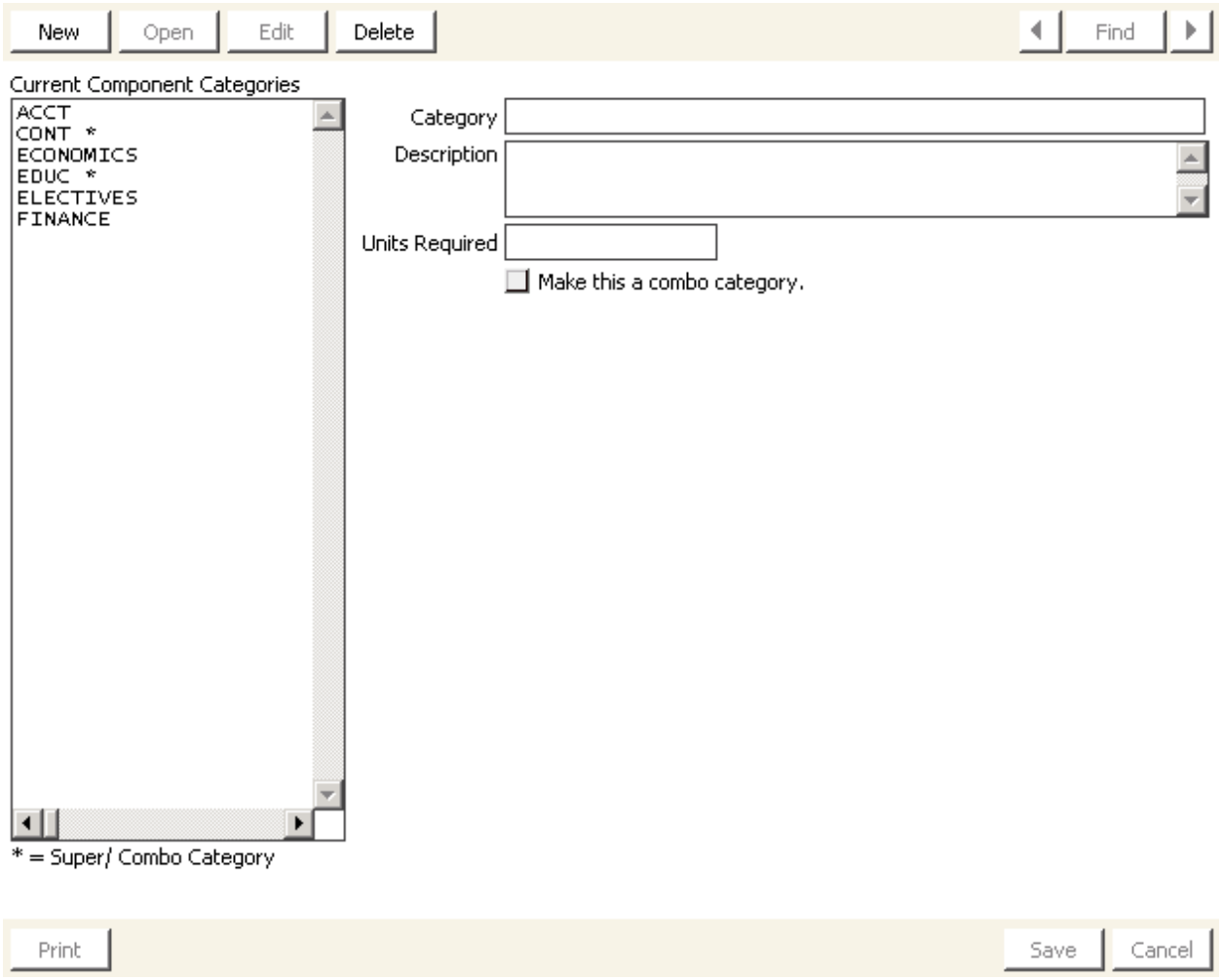
Opens a drop-down list of subcomponent-specific options:

- Address - Select this option to open the Component Address window to enter an address for the selected subcomponent.
- Prerequisites - Select this option to open the Component Prerequisites window to enter prerequisites for the selected subcomponent.
- Instructors - Select this option to open the Component Instructors window to enter the names of instructors who teach the subcomponent.
- Statistics - Select this option to open the Component Statistics window where you can view the number of students registered for the selected subcomponent, the number who have passed, and the number who have failed.

To create a subcomponent

1. From Set up subcomponents window, click New.
2. Enter the subcomponent Code.
3. Enter the Begin Date and the End Date for this subcomponent, if applicable.
4. Enter the number of Units.
5. Enter the title of the subcomponent in the Title field.
6. (optional) Enter a description of the subcomponent in the Description field.
7. (optional) Enter pricing information associated with the subcomponent in the Regular and Non-Member fields.
8. (optional) Enter the income account associated with the subcomponent in the Income Account field.
9. Click Save.

Set up component categories window



Admin Console: Configure > Certification > Set up tables > Set up component categories

Desktop: Certification > Set up tables > Component categories

Current Component Categories

Lists the current categories

Category

Specifies the category code.

Description

Specifies a brief description of the category.

Units Required

Specifies the total component units required to satisfy the category, for example, nine units from components worth three units each. You must enter a value in this field.

> **Note:** Note: If you do not populate the Units Required field, iMIS considers the category complete upon the first occurrence of a registration for a component within that category.

Make this a combo category

Select this option to specify that this is a combo category. A combo category includes a combination of two or more categories.When you select this option, an additional field is shown so you can add the other categories associated with the combo category.

Combo category field

Lists available categories for the selected combo category. This field is shown when you select the Make this a combo category option.

Print

Lets you generate and print a Category Description report for the selected Component Category.

To clone a subcomponent

1. From Set up subcomponents window, select a subcomponent from the Current Subcomponents list.
2. Click Clone. The Component Clone window opens.
3. Enter the new code for the selected subcomponent.
4. Click Save.

Certification Components

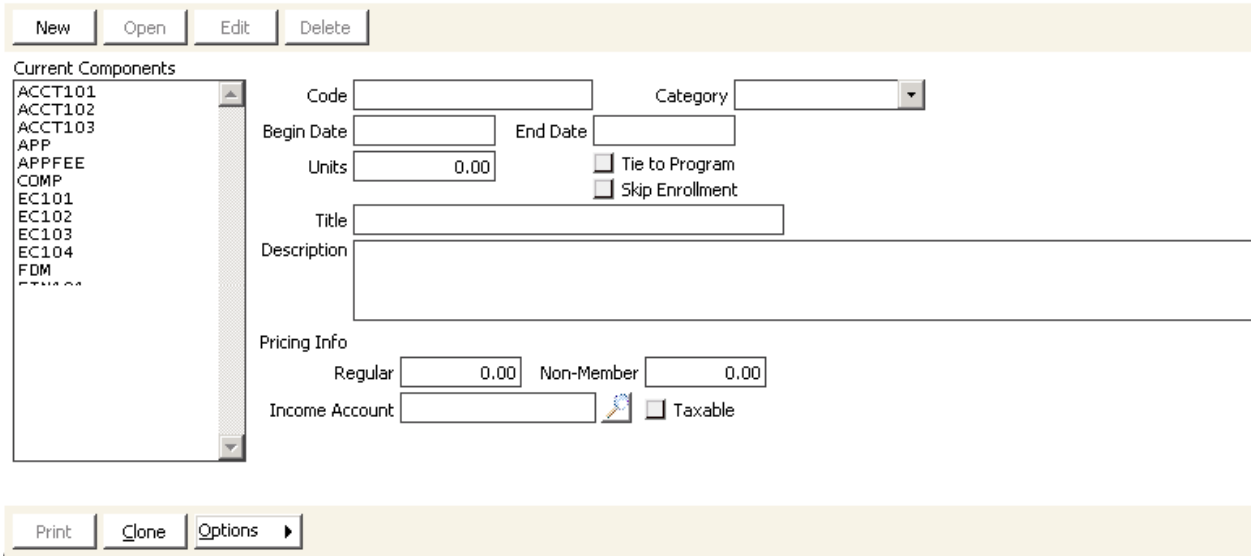
The first step in creating a certification program is to define the components required for program completion. You can clone or copy components and use them in other programs.

A component is anything that is required of a student to complete a certification program. Usually, this is an event, such as a class, seminar, or exam; however, components can be other types of requirements, such as enrollment or application fees, applications, resumes, or letters of recommendation.

In the exercises throughout this section, you will create components for the CMAS program. These components include the courses described in the previous section, fees, application forms, and other components.

Components are defined on the Set up components window. In this window, specify components and component information, such as categories, dates, and accounting information.

Set up components window



Admin Console: Home > Certification > Set up components
Desktop: Certification > Set up components

Current Components

A list of current components is displayed in this area of the window.

Code

(required) Specifies the primary abbreviation or identification code to represent this component.

Category

(optional) Specifies the component categories assigned to this item. These categories refer to those defined on the Set up component categories window.

> **Note:** Note: If you do not define categories before you create components, you can edit the components later, after you have created categories.

Begin Date, End Date

(optional) Use Begin Date and End Date fields to record the start and stop times for a component. For example, a class beginning on Monday would have Monday's date in the Begin Date field and a class ending on Friday would have Friday's date in the End Date field.

Units

(optional) Specifies the number of units a customer receives for completing the component

Tie to Program

(optional) Select this option to tie a component to a specific program. Because components are reusable, if a component called Class 1 is part of Program A and a part of Program B, the student's completion counts toward both programs.

Tie to Program works as a link between requirements that cannot be transferred, such as fees and specific program definitions. A component marked with Tie to Program is linked to a specific program when a student registers for the component; however, the component requirement must be satisfied again for each program that requires it.

For example, if you have a General Fee component that is required for all programs and you enabled Tie to Program when you created it, the component is tied to a program every time a student registers for that program. If the student registers for another program requiring the same fee, the student again must pay the fee because it also is linked to the second program.

The following are scenarios you should consider when registering students for components marked Tie to Program:

- If you register a student for a component through a specific program, iMIS automatically ties the component to that program regardless of whether the component is marked Tie to Program. If you do not want it tied to that program, delete the program ID on the Program field on the Register a student by component window.
- If you register a student for a component directly through the Register a student by component window, the only way you can tie it to a program is if you enter the program ID in the Program field.
- If a student completes a component through the Events module, the Program field is not populated. You must edit the component registration and enter the program ID manually to tie the component to a program.

Skip Enrollment

Select this option to specify components that do not require the student's attendance, such as program fees, applications, and resumes.

Title

Specifies a short descriptive title for the component, which displays on the Program Details window and on the Student Transcript report.

Description

(optional) Specifies a lengthy note, description, or comment associated with the component. You can enlarge this scrolling text field by pressing Ctrl+Z.

Pricing Info

In the Pricing Info area, specify pricing information (such as the cost of a component for members and non-members) and a G/L account number. When you register a student for a component with fees, an order is created. The transaction flows down to the iMIS G/L interface.

Regular - Use the Regular field to specify the default unit price (or member price) to apply automatically when a student enrolls in the component. When you enter a component, you can override this default price.

Non-Member - Use the Non-Member field to specify the price for non-members. This price is applied automatically when anyone with non-member status enrolls in the component. This option allows you to avoid most of the manual price overrides.

Income Account

This field identifies the General Ledger income account to credit when sales entries are made for this component. You can click the lookup icon to select an income account.

> **Note:** Note: You do not have to establish G/L accounts if you are not using the iMIS Financial (G/L) interface. If you leave this field blank, iMIS records this entry in the account you designated in the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts).

Taxable

The Taxable checkbox is enabled by default, indicating that the component is subject to sales tax. Select the checkbox to clear it, which reverses the automatic taxability for the component.

Taxable (Canadian)

> **Note:** (Canadian taxation enabled) Canadian Taxation options are not applicable to the Certification module.

Print

Lets you generate and print a Component Description report for the selected component.

Clone

Lets you clone or copy the selected component. The Component Clone window opens where you can enter the name for the new component.

Options

Opens a drop-down list of component-specific options. You can access six sub-windows from the Set up components window. These windows collect and display details about components, such as address, enrollment statistics, location, and instructors.

- Subcomponents - Opens the Subcomponent List window, which displays the sub-components associated with the selected component.
- Address - Opens the Component Address window to enter an address for the specified component. If the component is a class, this may be the ballroom number for a convention hall; if the component is a fee, it may be the address where the fee is sent.
- Prerequisites - Opens the Component Prerequisites window to view the prerequisites associated with the selected component.
- Instructors - Opens the Component Instructors window to enter the names of instructors for a component course.
- Locations - Opens the Locations window to add the location, date, and time for a particular component, as well as speaker and provider information. Speakers and providers must have name records in the iMIS database.
- Statistics - Opens the Component Statistics window to display selected course information, including the number of students who enrolled in the component and the number who have passed or failed the component.

To create a component

1. From Set up components window, click New.
2. Enter the component Code.
3. Select a category from the Category drop-down menu, if applicable.

4. Enter the Begin Date and End Date for this component, if applicable.
5. Enter the number of Units.
6. Enable the Tie to Program option if this component is tied to a specific program.
7. (optional) Enable the Skip Enrollment option.
8. Enter a Title.
9. (optional) Disable the Taxable option.
10. Click Save.

To attach subcomponents to a component

Components can be comprised of smaller groupings called subcomponents. For example, a course may have requirements for completion, such as a tutorial, study guide, or a proficiency test. You must complete all subcomponents before you can complete the component.

1. From Set up components window, select a component from the list of Current Components.
2. Click Options and select Subcomponents from the list. The Subcomponent List window opens.
3. Click Insert. The Child Components window opens and a list of available subcomponents is shown.
4. Select the appropriate subcomponent(s) to attach the subcomponent to the selected component.
5. Click OK to return to the Subcomponent List window. The current subcomponents for the selected component display on the window.
6. Click Save to return to the Set up components window.

To make a subcomponent required

1. From Set up components window, select a component from the list of Current Components.
2. Click Options and select Subcomponents from the list. The Subcomponent List window opens.
3. Double-click the appropriate subcomponent. The subcomponent displays in the Subcomponent List window with a Y in the Required column.
4. To remove the Y and make the subcomponent not required, double-click the subcomponent again.
5. Click Save.

To enter component address information

1. From Set up components window, select a component from the list of Current Components.
2. Click Edit.
3. Click Options and select Address from the list. The Component Address window opens.
4. Enter the address for the selected component in the address fields.
5. Click Save on the Component Address window.
6. Click Save on the Set up components window.

To define component prerequisites

A component may have specific prerequisites that the student must complete before enrolling in the component. For example, before a student can take Advanced Accounting, the student must have successfully completed Beginning and Intermediate Accounting. Define component prerequisites on the Component Prerequisites window.

The large text field in this window holds information about requirements that a student must meet before being allowed to register for a component. The data you enter in this field is not validated before enrolling a student in a component, so make sure to check the component prerequisites before enrolling the student.

1. From Set up components window, select a component from the list of Current Components.
2. Click Edit.
3. Click Options and select Prerequisites. The Component Prerequisites window opens.
4. Enter the prerequisite information.
5. Click Save on the Component Prerequisites window.
6. Click Save on the Set up components window.

To enter component instructor information

The Component Instructors window contains a text field for recording the name of the person teaching the course and the instructor's credentials or other pertinent information.

1. From Set up components window, select a component from the list of Current Components.
2. Click Edit.
3. Click Options and select Instructors. The Component Instructors window opens.
4. Enter the instructor information.
5. Click Save on the Component Instructors window.
6. Click Save on the Set up components window.

To create multiple locations for a component

With the Certification module, a single component can have multiple locations or occurrences. In addition, you can maintain unique speaker and sponsor/provider information for each occurrence of the component.

For example, if the course (component) MACCT101 is sponsored by vendors at various locations across the country, create one component record for MACCT101 and create multiple location records for each class offering.

The unique location is assigned at the time the component registration is processed. A CERTIFICAT activity record is created upon the first occurrence of a component registration for the Speaker and the Provider assigned to the location.

1. From Set up components window, select a component from the Current Components list.
2. Click Options and select Locations. The Locations (name of component) window opens.
3. Create a location.

- Click New.
- Enter the name of the location of the course in the Instance Name field.
- Enter the date (day, month, and year) the course begins in the Begin Date field.
- Enter the time that the component begins in the Begin Time field. The default is AM.
- Enter the date (day, month, and year) the course ends in the End Date field.
- Enter the time that the component ends in the End Time field.
- Enter the ID of the speaker in the Speaker field, or click the lookup icon to select an ID.
- Enter the ID of the provider in the Provider field, or click the lookup icon to select an ID. The address and telephone fields fill automatically with the individual's address information.
- Click Notes to open the Location Notes window.
- Enter the information to be maintained for the component location.
- On the Locations Notes window, click OK. The Locations Notes window closes.
- On the Locations window, click Save.
- Repeat for all of the locations that you need to add for this component.

4. Close the Locations window.

To view component statistics

View the status of the selected component through the Component Statistics window. The status information includes the number of students enrolled in the component if the component is not marked Skip Enrollment, as well as the number of students with the status of P for passed or F for failed.

1. From Set up components window, select a component from the Current Components list.
2. Click Options and select Statistics from the list of options. The Component Statistics window opens.

   Detailed information about individuals who are enrolled in, or who have completed the program is displayed in the window.

- The number in the Currently Enrolled field is the number of students enrolled in the selected component.
- The number in the Total Passed field indicates the number of individuals who have passed this component.
- The number in the Total Failed field indicates the number of individuals who have failed this component.

3. Click OK to close the window.

   To locate a component using the Component Find window

   Enabling the Subset Component Maintenance with Find window option on the Certification System Options window activates a lookup window that is displayed each time you open the Set up components window.

   This window allows you to locate a component by reviewing only a subset of the list. You can view components by ID, Title, Category, Location, or Ad hoc. This is helpful if you have many components because this option allows you to view a few components at a time.

1. From Set up components window, select Category under Search Types.
2. Click Open.
3. Enter the component categories code in the search box, for example ACCT.

4. Click OK to view the list. A list of components is shown.

Certification Programs

Creating a Program

Programs are created in the Set up programs window. Programs can be very simple with only a few of components or very complex with several components and component categories.

Certification programs can be created in the following windows: Current Certification Programs, Certification Program Types, Set up programs, and Program Items.

Creating a program involves the following four steps:

1. Define your program.
2. Define the initial requirements of the program.
3. Define the maintenance requirements of the program.
4. Define the grace period requirements of the program.

Set up programs window - Program list

The Set up programs window serves two purposes:

- Provides a summary of all defined programs.
- Transfers you to a second Set up programs window when you select the program and click Edit, when you double-click the selected program, or when you click New to add a new program.

Admin Console: Home > Certification > Set up programs
Desktop: Certification > Set up programs

Sort Options

The Set up programs window summarizes the information for each program currently defined in the system. This includes the program Code, Status, Title, and Date Established. If you decide to retain definition data on closed or canceled programs, this list can be quite long. The following are sort options to change the order of the list to make viewing it easier:

- Date - (Default) Lists the programs chronologically by start date
- Code - Lists the programs alphabetically by program code. If you assign similar codes to similar programs (for example, PROG94 and PROG95), they are grouped together.
- Title - Lists the programs alphabetically by program title
- Status - Lists the programs by the status of the program. The status types are:
- A - Available
- C - Closed
- X - Canceled

Joint

Opens the Joint Programs window to join two certification programs.

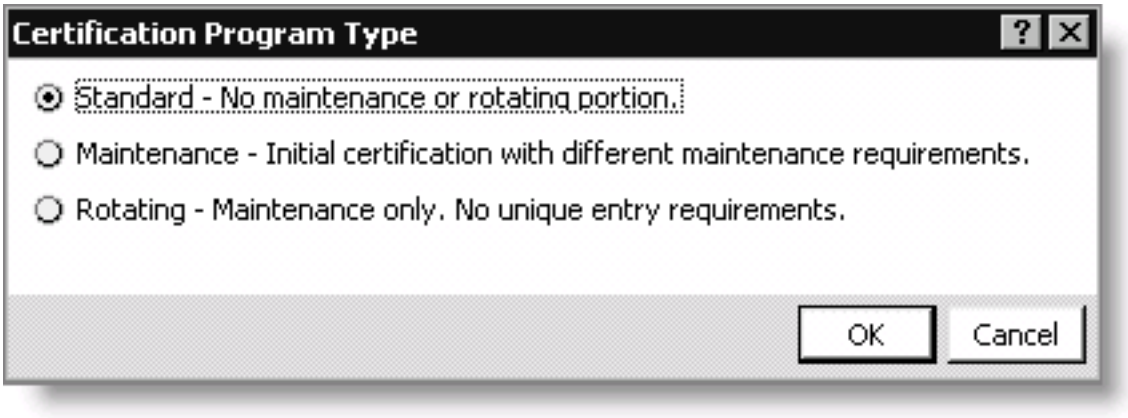
Clone

Copies the program currently selected. This feature requires that you enter a new title. Use this option to generate a new program based on the contents and requirements of the program you have selected. Modify the information as appropriate for your new program.

Register

Opens the Register a student by program window for the program currently selected (selected) on the list. This is a useful option if you just edited a program definition and you want to start entering registrations.

Certification Program Type window



From Certification, select Set up programs, and click New

Before you create a new program, define the program type. The Certification module supports three types of programs:

- Standard - A standard program has no maintenance or rotating period; the student is required to complete only an initial set of requirements to become certified.
- Maintenance - A maintenance program has an initial set of requirements for certification and a separate set of requirements to maintain the certification. The maintenance portion

of the program begins only when the student completes all the initial program requirements. This can be automatic if the appropriate option is enabled. To manually enroll the student in the maintenance program, click Rollover on the Register a student by program window when the student has completed the initial requirements.

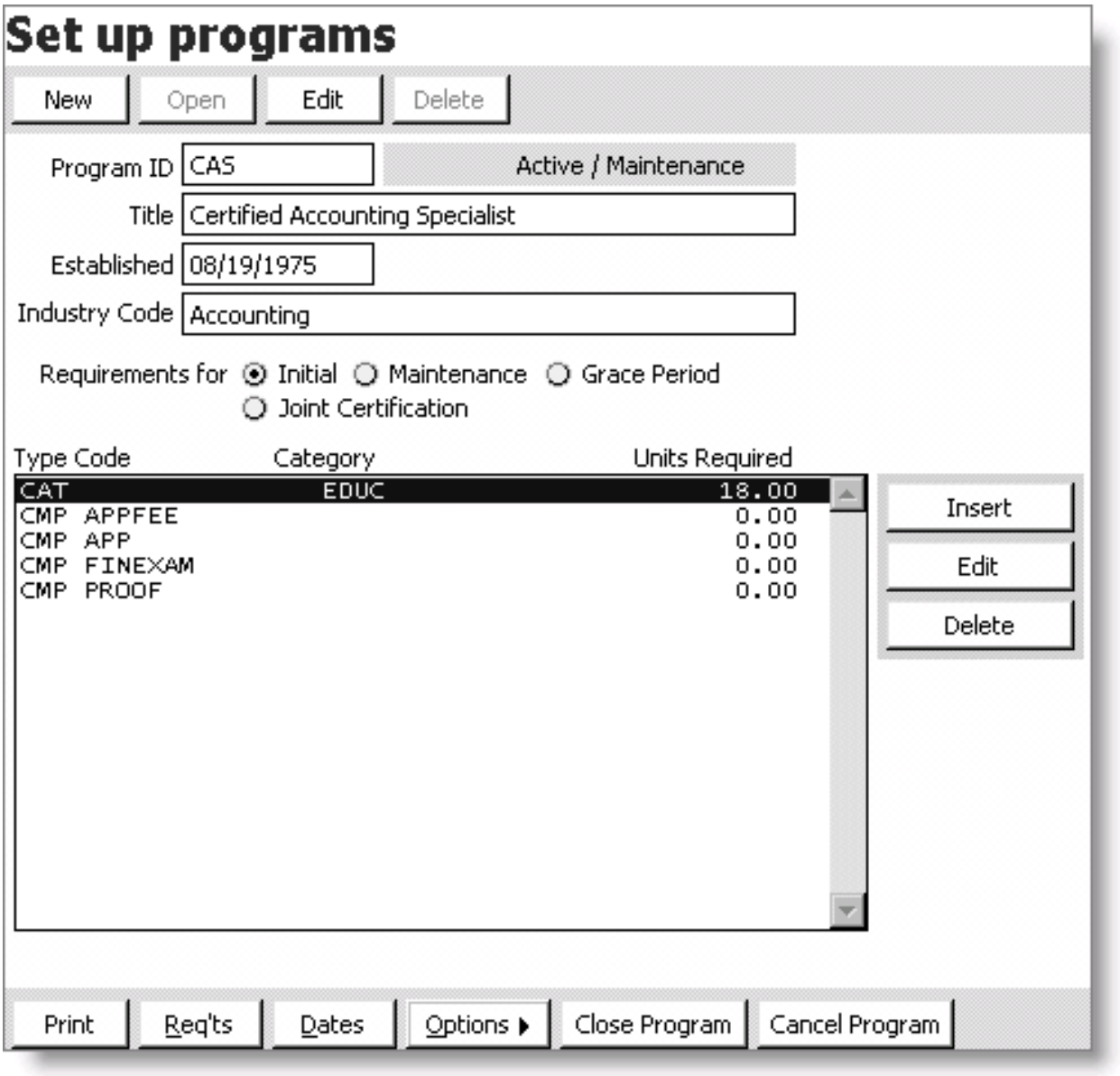
- Rotating - A rotating program does not have a set of initial requirements, but requires a student to complete a set of requirements repeatedly over a specific period to be certified.

> **Note:** Note: You must select one of these options before you go to the Set up programs window and define the program. After you have identified the program type and entered program information on the Set up programs window, you cannot go back and edit the program type.

Set up programs window - Program definition

The top half of the window records the primary information about the program. The bottom half defines the category and component requirements that make up the program and includes buttons allowing access to secondary detail windows.

Set up programs window



Admin Console: Home > Certification > Set up programs

Desktop: Certification > Set up programs

Program ID

Specifies the short name of the program.

Title

Specifies the longer description of the program.

Established

(optional) Specifies the date the program was established.

Industry Code

(optional) Specifies the Standard Industry Code (SIC) for the program.

Requirements for:

- Initial - Enable to display information about the initial program certification requirements.
- Maintenance - Enable to display information about the program's maintenance requirements.

> **Note:** Note: You can display the maintenance information only if you initially defined this program as a maintenance program.

- Grace Period - Enable to display information about the program's grace period.

> **Note:** Note: Enable the Grace Period option only if you enabled the grace period option on the Certification System Options window.

- Joint Certification - Enable to display information about joint certification between this program and another program. This option works only if you defined this program as a joint certification program.

Component and Category List Types

Lists all components and categories for the selected program.

Req'ts

Opens the Program Requirements window.

Dates

Opens the Program Dates window.

Options

Opens an options menu for further program definition.

Close Program

Closes the program.

Cancel Program

Cancels the program.

To create a certification program

1. From Set up programs window, click New. The Certification Program Type window opens.
2. Select a program type.
3. Click OK. The Set up programs - program definition window opens.
4. Enter the code for the program in the Program ID field.
5. Enter the Title of the program.
6. (optional) Enter the date that the program was Established.
7. (optional) Enter the Industry Code for the program.
8. Click OK.

Note: The order in which you add components and categories to a Save is the order that they are displayed on the Set up programs window. This cannot be changed.

To create the initial requirements for a program

The next step in creating a program is to define the initial requirements.

1. From Set up programs window, double-click a program to open the Set up programs - program definition window.
2. Select the Initial option in the Requirements for section.
3. Click Insert on the window. The Program Items window opens. A list of categories is displayed in the window.

Note: When you first open the window, the default setting is to display a list of categories.

4. Select a category from the list, if applicable. To insert multiple items, hold down the Ctrl key as you select each item.
5. Click OK to return to the Set up programs window.
6. Click Insert on the window to re-open the Program Items window. This time, enable the Component option. A list of components is shown.
7. Select a component from the list. To insert multiple items, hold down the Ctrl key as you select each item.
8. Select the component(s) required for the initial phase of the program.
9. Click OK to return to the Set up programs window.

To create the maintenance requirements for a program

1. Select Maintenance in the Requirements for area of the Set up programs window.
2. Click Insert. The Program Items window opens. A list of categories displays in the window.
3. Select a category from the list if applicable. To insert multiple items, hold down the Ctrl key as you select each item.
4. Click OK to return to the Set up programs window.
5. Click Insert on the window to open the Program Items window again. This time, enable the Component option. A list of components is shown.
6. Select a component from the list. To insert multiple items, hold down the Ctrl key as you select each item.
7. Click OK to return to the Set up programs window.

To create grace period requirements for a program

1. Select the Grace Period option in the Requirements for area of the Set up programs window.

2. Click Insert. The Program Items window opens. A list of categories displays in the window.
3. Select a category from the list if applicable. To insert multiple items, hold down the Ctrl key as you select each item.
4. Click OK to return to the Set up programs window.
5. Click Insert on the window to open the Program Items window again. This time, enable the Component option. A list of components is shown.
6. Select a component from the list. To insert multiple items, hold down the Ctrl key as you select each item.
7. Click OK to return to the Set up programs window.

To edit a program requirement

There may be times when you will need to edit program requirements, for example, if the organization changes existing requirements or adds new ones.

1. From Set up programs window, double-click a program to open the Set up programs program detail window.
2. Select a category or component from the list of program items and click Edit. The Program Details window opens.
3. Enter the new units and click OK.

To delete a program requirement

You also can remove a program item on the Set up programs window.

1. From Set up programs window, double-click a program to open the Set up programs - Program definition window.
2. Select a category or component from the list of program items and click Delete.

- If a message is displayed informing you that there are registration records tied to the Program/Component combination, and that you must cancel the registration records. Click

Yes to cancel the registrations.

A message is displayed asking you confirm the deletion.

3. Click Yes to delete the component.

Specifying Joint Program Requirements

In addition to Initial, Maintenance, and Grace Period requirements, you can create joint certification programs to accommodate a unique set of requirements for students who are enrolled in multiple programs. For example, a student who is enrolled in both Program A and Program B may have different requirements to complete certification than a student who is enrolled in only one of the programs. These requirements are specified under the Joint Certification portion of the program.

When you create the programs in the Set up programs window, specify programs as joint programs. When you run a completion test from the Register a student by program window or from the Generate reports window, iMIS determines that the programs are joint programs. If the student is enrolled in both programs, the program completion is tested based upon the requirements defined in the joint requirement portion of the program.

To join two programs

1. From Set up programs window, click Joint to open the Joint Programs window.
2. Select a program under Available Programs, right-click, and drag the program into the Joined Programs area of the window.
3. Select another program from the list of Available Programs, right-click, and drag the program into the Joined Programs area of the window. A message is displayed asking if you want to join the two programs.
4. Click Yes. The Joint Programs window opens. A new program displays in the Joined Programs area of the window.
5. Click OK.

To specify joined program components for the first joined program

After you join two programs, identify the components shared between the programs.

1. From Set up programs window, select the first joined program from the list of current programs.
2. Click Edit. The Set up programs window opens.
3. Enable the Joint Certification option.
4. Click Insert. The Program Items window opens. A list of categories display.
5. Select a category.
6. Enable the Component option and double-click in the display area of the window. A list of components display.
7. Select a component from the list of components.
8. Click OK. The Set up programs window opens with the joint certification information.

To specify joined program components for the second joined program

1. From Set up programs window, select the second joined program from the list of current programs.
2. Click Edit. The Set up programs window opens.
3. Enable the Joint Certification option.
4. Click Insert. The Program Items window opens. A list of categories is shown.
5. Select a category if applicable.
6. Enable the Component option and double-click in the display area of the window. A list of components is shown.
7. Select a component from the list of components.
8. Click OK. The Set up programs window opens with the joint certification information.
9. Click OK. Repeat steps for each category and/or component.

To view a detailed list of program requirements by program type

Now that you have created several different types of program requirements, you can view them individually through the Program Requirements window. For example, you can view requirements for the initial, maintenance, grace period, and joint portions of a program.

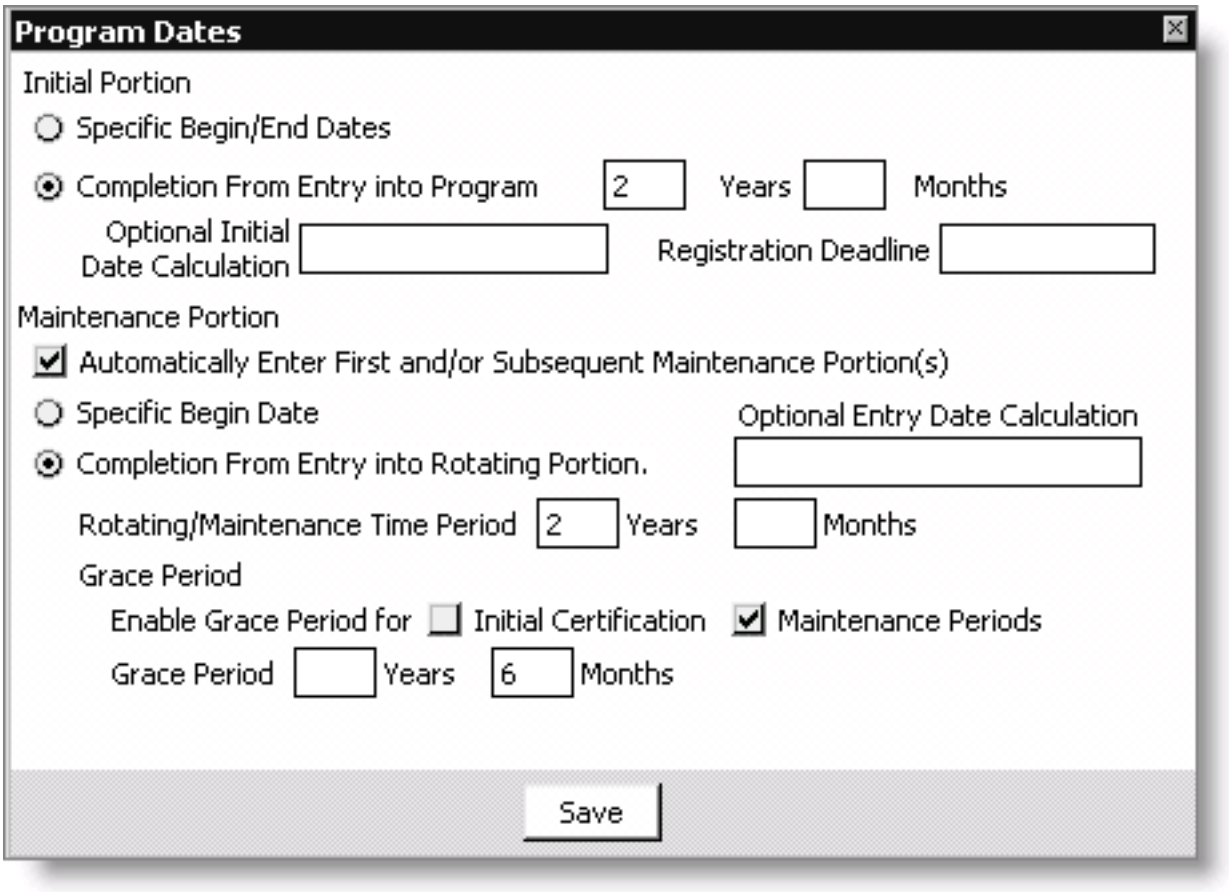
1. From Set up programs window, select a program and double-click on it. The Set up programs - Program definition window opens.
2. From Requirements for, select a viewing option.
3. Click Req'ts to open the Program Requirements window.

   The window displays a high-level view of the requirements of the joint portion of the program.
4. Click Expand All to see an expanded view of all initial program requirements, or double-click an individual requirement to view its components.

Setting Program Dates

An important part of the certification program setup is establishing time frame requirements that may apply to the initial, maintenance, or grace period portions of a certification program. Set the program-specific dates in the Program Dates window.

Program Dates window



From Certification, select Set up programs, double-click a program, and click Dates

Initial Portion

The options within this area of the window relate only to the initial portion of the program.

- Specific Begin/End Dates - This option allows you to specify program begin and end dates. For example, if you have a program that will be available for only one calendar year, select this option and set the begin date to 01/01/2000 and the end date to 12/31/2000.
- Completion From Entry into Program - Select this option if you have a certification program with a defined deadline for completing the requirements. For example, if a student must complete a set of courses and exams within a two-year period.

Optional Initial Date Calculation

- Enter an optional calculation to determine the enrollment date. For example, if all customers are enrolled automatically when they join the organization, enter Name.JOIN_DATE into the Optional Initial Date Calculation field.

  Registration Deadline

  This is an information-only field for storing the deadline date for enrollment in the program.

  Maintenance Portion

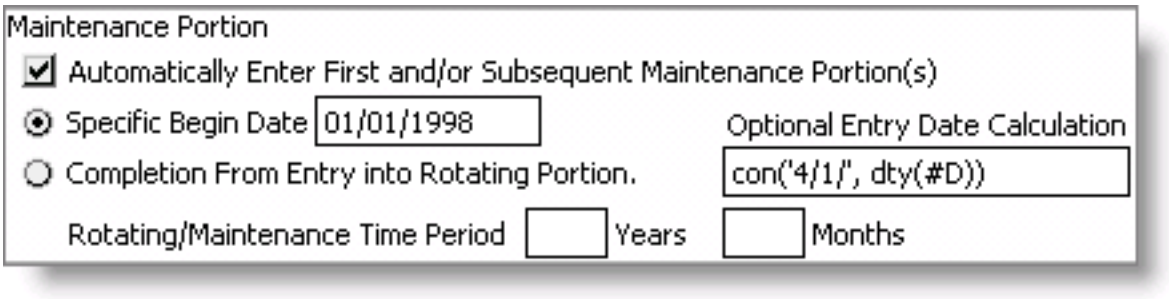
  The options within this area of the window relate only to the maintenance portion of the program.

  Automatically Enter First and/or Subsequent Maintenance Portion(s) - If you enable this option, program maintenance registration records are created automatically when the program completion test is performed.

  > **Note:** Note: If the program has a maintenance portion, enroll the student for the maintenance portion when the student completes the initial requirements.

  When the completion test is run from the Generate reports window or the individual's Set up programs window, and it is determined that the student has completed the requirements for the initial or current maintenance cycle, a new registration record is created for the first maintenance cycle or for the subsequent maintenance cycle.

- Specific Begin Date - Use this option to set a specific begin date for a maintenance cycle. For example, if the program maintenance cycle runs from January 1 to December 31, set the begin date to January 1 of the following year regardless of when the initial portion of the program was completed.



- Completion from Entry into Rotating Portion - Select this option if your program is a rotating or maintenance type and the student is required to complete the same set of program requirements over a defined period of time to maintain certification. For example, enable this option if students are required to pay a fee and to complete 20 hours of continuing education hours every two years. In this case, set the Rotating/Maintenance Time Period to two years.

  Optional Entry Date Calculation

  Use this option to calculate the begin date of the current and subsequent maintenance cycles.

  For example, use the following Omnis calculation example to set all entry dates in the maintenance cycle to April 1 of the current year:

  con('4/1/', dty(#D))

  Enable Grace Period for

  Grace periods carry their own unique sets of requirements, such as fees or additional forms. The ability to use the Grace Period feature is activated on the Certification System Options window.

  When the completion test is run after the deadline, and the appropriate portion is passed and the requirements are not met, iMIS extends the deadline date based upon the time determined in grace period dates. Also, any additional components that are specific to the grace period are added to the program.

- Initial Certification - This checkbox grants students an extension of time to complete the initial certification portion of a program.

- Maintenance Periods - This checkbox grants students an extension of time to complete the maintenance portion of a program.

  Grace Period

- Years - Specifies the number of years for the grace period.
- Months - Specifies the number of months for the grace period.

  To set program date requirements

1. From Certification, select Set up programs to open the Set up programs window.
2. Double-click a program to open the Set up programs window.
3. Click Edit.
4. Click Dates to open the Program Dates window.
5. Select the Completion From Entry into Program option.
6. Enter the number of years required to complete the program in the Years field.
7. Select the Automatically Enter First and/or Subsequent Maintenance Portions option.
8. Select the Completion From Entry into Rotating Portion option.
9. Enter the number of years of the maintenance period for the selected program in the Rotating/Maintenance Time Period Years field.
10. (optional) Select the Enable Grace Period for Maintenance Periods option.
11. Enter the number of months for the Grace Period.
12. Click Save on the Program Dates window.
13. Click Save on the Set up programs window.

Setting Additional Program Options

The Certification module allows you to add detailed information about each program. From the Options drop-down menu on the Set up programs window, you can access additional selections to provide more information about a program.

Program Options menu

Description

Select this menu item to open the Program Description window where you can enter detailed information about the program. The Program Description user-defined fields added on the Set up certification module window display in the window.

Coordinators

Select this menu item to open the Program Coordinators window to record the names of the contacts responsible for the administration of the program.

Notes

Select this menu item to open the Program Notes window. This window contains a large free-form text area to add incidental program information and user-defined fields created on the Set up certification module window.

Prereq's

Select this menu item to open the Program Prerequisites window where you specify program prerequisites.

Roster

Select this menu item to display a list of students registered for the selected program by Enrolled, Passed or Failed status types.

To enter program descriptions

1. From Certification, select Set up programs to open the Set up programs window.
2. Double-click a program. The Set up programs - Program definition window opens.
3. Click Edit.
4. Click Options and select Description from the drop-down list. The Program Description window opens.
5. Enter additional program information in the note area of the window.

6. (optional) Enter the appropriate information in the User Defined Fields
7. Click OK to save the information and return to the Set up programs window.
8. Click Save.

Note: Use the Program Description window for inquiries about additional program information.

To enter coordinator information

1. From Certification, select Set up programs to open the Set up programs window.
2. Double-click a program to open the Set up programs window.
3. Click Edit at the top of the Set up programs window.
4. Click Options and select Coordinators from the drop-down list. The Program Coordinators window opens.
5. Enter the coordinator information.
6. Click OK.
7. Click Save.

To enter program notes

The Program Notes window provides you with a large text area to enter incidental information about the program. The Designation fields you specify on the Set up certification module window display in this window.

1. From Certification, select Set up programs. The Set up programs window opens.
2. Double-click a program to open a second Set up programs window.
3. Click Edit.
4. Click Options and select Notes. The Program Notes window opens.
5. Enter informational notes to be maintained for the program.

6. Enter the acronym for the designation in the user-defined field. This is the user-defined field created on the Set up certification module window.
7. Click OK to save the information and return to the Set up programs window.
8. Click Save.

To enter program prerequisites

In the Program Prerequisites window, enter the requirements a student must meet to enroll in this program. This field is not validated before you enroll a student in a program; therefore, make sure to check the prerequisites before enrolling the student.

1. From Certification, select Set up programs to open the Set up programs window.
2. Double-click a program to open a second Set up programs window.
3. Click Edit.
4. Click Options and select Prereq's from the drop-down list. The Program Prerequisites window opens.
5. Enter the program prerequisite information in the large note area of the window.
6. Click OK to return to the Set up programs window.
7. Click Save.

To view a program roster

After you register a student for a program or any of its components, you can view a program roster. A list of students currently enrolled in a program and a list of students who have already passed or failed the certification program display on the Program Roster window.

1. From Certification, select Set up programs to open the Set up programs window.
2. Double-click a program to open a second Set up programs window.
3. Click Options and select Roster. The Program Roster window displays a list of students

registered for the selected program.

4. Click OK to return to the Set up programs window.

Testing for Completion of a Program

To move a student past the enrolled status at the program level, you must mark the student as having completed the program requirements. To do this, you must either test for completion by opening the student's record in the Register a student by program window, or run the Program Completion List report.

When you run either of these processes, all of the program requirements are tested for completion. If the student has met all of the requirements, the program assigns a status of Complete and the system date is inserted into the Program Completion Date field.

If the student registered for a program that you designated as a Joint program and you specified Joint Certification requirements on the Set up programs window, iMIS tests for completion based on the Joint program requirements.

If you have a program with a subsequent Maintenance Period or, if the student has completed a current Maintenance Period, a new maintenance program registration record is created with a status of Enrolled if you have selected the setup option Automatically Enter First and/or Subsequent Maintenance Portion(s) on the Program Dates window (from Certification, select Set up programs, double-click a program, and click Dates). Otherwise, you can manually move the student into the subsequent maintenance portion of the program by clicking Rollover on the Register a student by program window.

To test for an individual's completion of a program

1. From Certification, select Register a student> By program to open the Register a student by program window.
2. Click Open and enter the customer ID in the Registrant field.
3. Select the program and click Complete. A system message is displayed indicating whether the registrant has or has not completed the program.
4. Click Save.

To test for completion using the Program Completion List Report

Running the Program Completion List report automatically tests for completion for all students registered in a program, or all students registered in all active programs.

1. From Certification, select Generate reports to open the Generate reports window.
2. Select Completion from the Report Type list, and select the Program Completion List report.
3. Click Run to open the Certification Selections window.
4. Select one of the following search options:

- Select Single Program and enter a program code, or click the lookup icon to select a program,
- Select All Active Programs; or
- Select Ad Hoc Search and enter search parameters on the Select Search Instructions window.

5. Click OK to run the report.

Canceling, Closing, and Deleting Programs

To close or cancel a program

When you close a program, a status of C is shown beside the program until you delete it. When you cancel a program, a status of X is shown beside the program until you delete it.

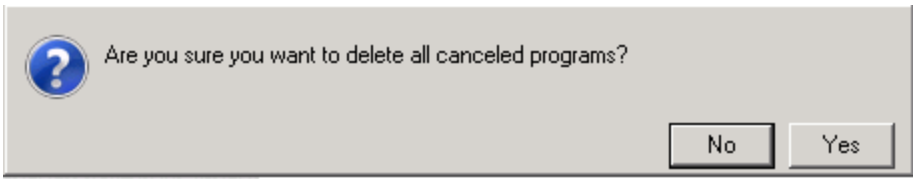
> **Note:** Note: If you enable the Delete Program on Cancel option or the Delete Program on Close option on the Certification System Options window, the program setup is deleted when you cancel or close the program. This means that you will no longer see it on the Set up programs window.

1. From Certification, select Set up programs to open the Set up programs window.

2. Double-click the program you want to close. The Set up programs - Program definition window opens.
3. Close or cancel the program.

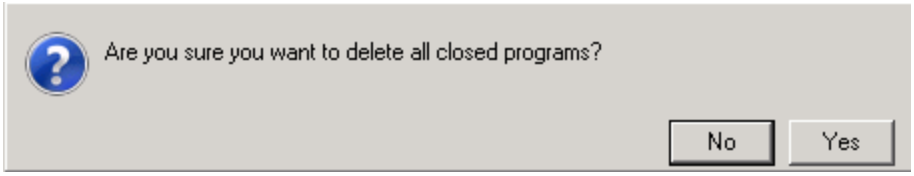
- Click Close Program. A message is displayed asking you to verify that you want to close the program. Click Yes to close the program. A C is displayed next to the name of the program you closed.
- Click Cancel Program. A message is displayed asking you to verify that you want to cancel the program. Click Yes to cancel the program. An X is displayed next to the name of the program you closed

Delete canceled programs window



Admin Console: Home > Delete canceled programs
Desktop: Certification > Set up tables > Delete canceled programs

Delete closed programs window



Admin Console: Home > Delete closed programs
Desktop: Certification > Set up tables > Delete closed programs

To delete a closed or canceled program

1. From Delete closed programs, a message asks you to confirm the deletion.
2. Click Yes.

Commerce

From your Staff site, Commerce offers a quick-view, up-to-date look at key product revenue for your organization.

- Product revenue last year
- Product sales by member type this year
- Sales by product category this year
- Number of orders this year
- Product revenue this year
- Top-selling products
- All products

Adding and Editing Products

The Item Creator iPart lets you build new product offerings and edit existing ones. From the iPart, you can define product details including the Item Class, Item Code, Name, Pricing information, tax configuration, whether or not the product has inventory, and the GL account. You can edit products in the iPart that were created within the Administrative Console, and vice-versa.

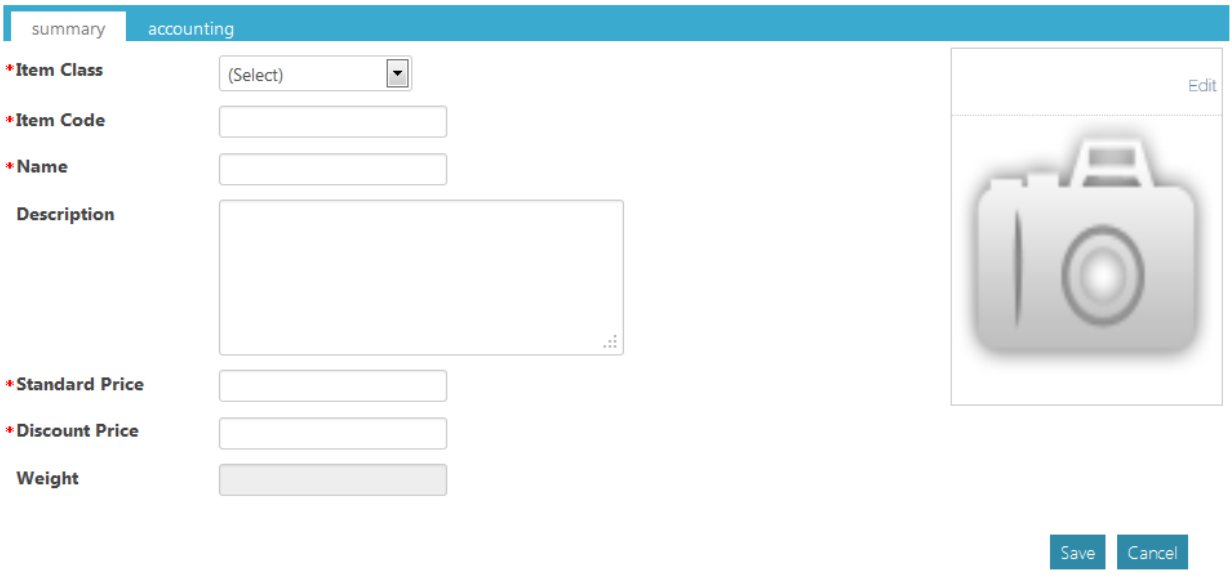
Note: You can create a collection of items, known as a kit, from the Administrative Console. This allows you to create complex offerings with quantity requirements.

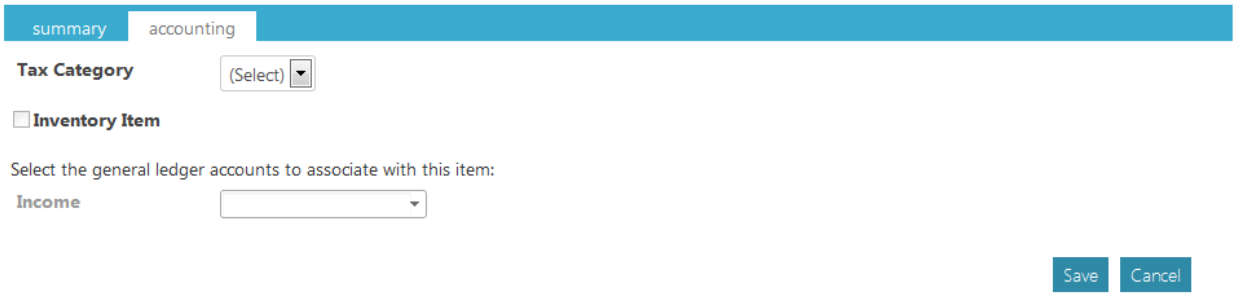
Defining or editing Commerce Items

The Item Creator iPart has two modes: Add or Edit

- Add mode: Enter the Summary and Accounting information for the product, then Save to create the new product.
- Edit mode: When you pass a product's Item Code to the iPart using the iProductCode URL parameter, the iPart displays in edit mode.

1. From Products, click on an item to edit or click Add to define a new item.





Note: If an item is already in your cart, you might need to remove it from the cart before editing it.

2. Select the Item Class.

   Note: The Item Class dropdown displays the product categories defined in the Administrative Console.

3. Enter the Item Code.
4. Enter the Name and Description of the item.
5. Enter the Standard Price (Non-Member) and Discounted Price (Member).
6. (optional) Click Edit and select the picture to display for this item..
7. Select the Accounting tab to review the default settings and make any required changes for the item.

- The Tax Category specifies the taxation rules to be applied.
- Enable or disable the Inventory Item checkbox to indicate whether the item has inventory.
- You can override the default General Ledger accounts from the Income dropdown list. Enter the desired amount name or code, and then select the account from a filtered list.

8. Click Save.

   The item detail page displays as it will appear to users. In addition, the item will display in the list of commerce items. The user can click the item name to view details.

Note: Product Kits and products with a negative standard price or discount can only be edited through the Administrative Console. An option to edit these products will not be visible on the Web.

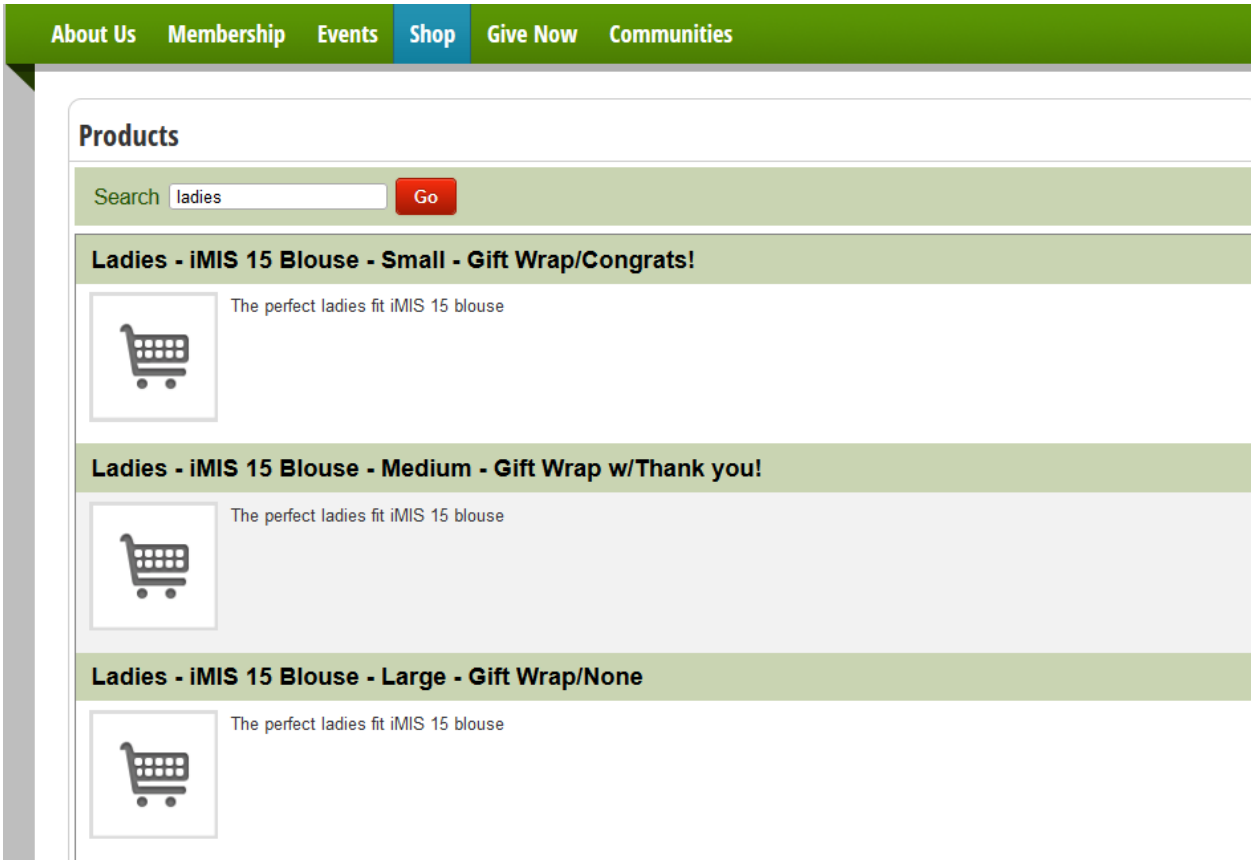
Making a purchase

For yourself or on behalf of another contact, you can browse and search for specific Products and view your Cart, or the Cart of another contact.

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

Searching for a product

From Shop, you can search for a product in the iMIS system.



Tips

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

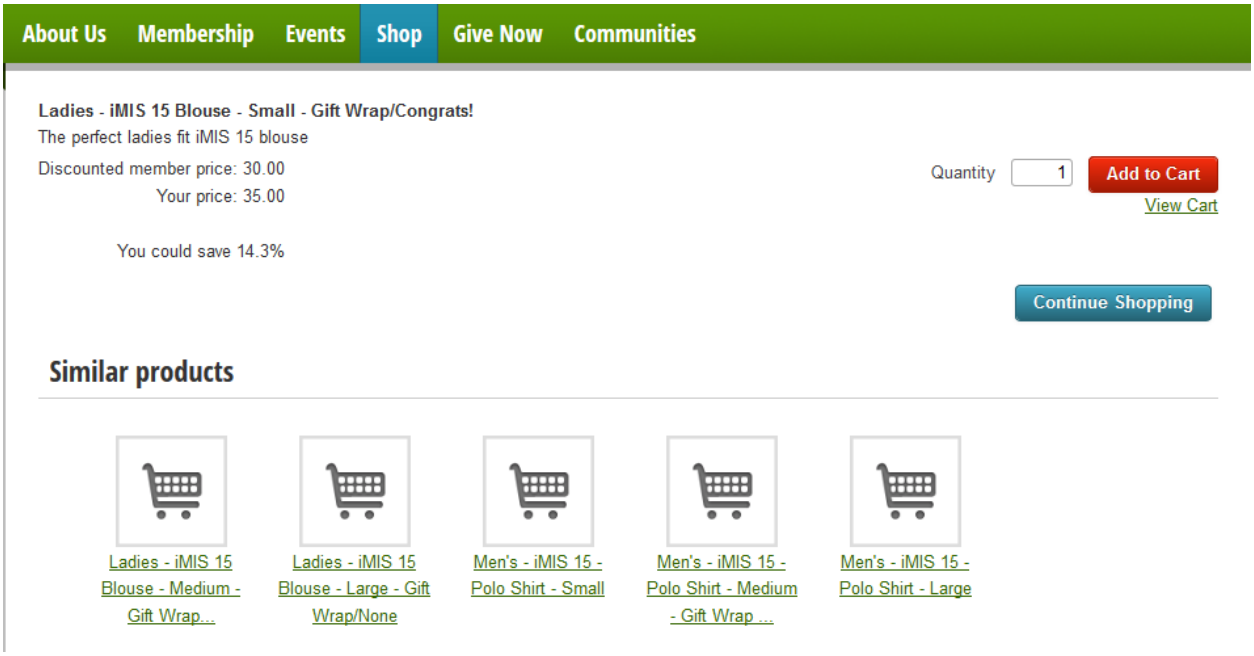
  No search results?

- Search terms must be three or more characters long.
- In some cases, searched terms may exist outside of your 300-character product description. To improve search results, simply enter additional terms.

  Using the Cart

  From the Store tab, you can view, add, and remove products.

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



4. When you are finished selecting products, Checkout. iMIS will guide you through the rest of the purchasing process.

5. From the Cart page, you can adjust the quantity of or remove products from the cart.

- From the Ship To section, you can select a Shipping To and Shipping Method. You may choose another address if desired.
- From the Payment Details section, enter your payment details.

  Note: You may select a billing address that is different form your shipping address.

6. Submit Order.

Billing for membership dues

You can use your site to collect membership dues from both members and prospects:

- For existing members who need to renew, just bill as usual:
- Run the billing cycle to generate the invoices.
- (accrual dues) Post the resulting batch.
- When viewing their profile on your site, members are prompted to renew (as long as the invoice remains unpaid).
- If they opt to renew, the billing item moves to their cart, for payment.
- For site guests who want to join your organization, set up a special Join Now dues product to show up on a Join Now page, as described below.
- When guests check out with a Join Now product in the cart, subscription records synchronized to the same membership term dates are created and the customer type changes to the customer type selected in the billing cycle. If customers choose to make a payment instead of using Bill Me, the paid thru status of the subscriptions will not be updated until the batch of payment transactions posts.

  Note: Join Now functionality is currently implemented for cash-based accounting only. Using Join Now with an accrual dues system will still work, but iMIS will treat the dues as cash. Future renewal billings will be treated as accrual dues. Also, Join Now does not currently support Chapter joins.

  To set up a "Join Now" billing cycle

In Admin Console, check your dues item pricing and create a special billing cycle called Join Now:

1. Verify the pricing for your dues items.

   Tip: Product pricing follows this order: Is there a price on the Special Pricing window? If not, is there a price on the Customer Types window (or is the Comp option enabled)? If not, use the price on the Products window.

- On the Customer setup window for Customer Types, verify the Dues Billing options for your primary membership type (which you will use for Join Now).
- On the Billing setup window, verify that you have one product code for each dues or subscription involved in your membership options.
- On the Billing setup window, define any special pricing for your membership fees, if needed.

2. On the Billing setup window, create a new cycle beginning with "Join Now" (with a space). Multiple Join Now billing cycles can be created by including an additional description in the cycle name, such as Join Now Student.
3. For Member Types, select one member type. The contact will be converted to this Member Type when they join using this billing cycle.

- For Products, select whichever options you want to offer.
- For Other Billing Instructions, be sure to enable the option for Add Member Type Items as well as those for others, as needed.

4. On the Customer setup window, edit your DUES Description to be how you want it to appear to the public (such as “Membership Fees”).

   To set up a "Join Now" page

   On your members' site, create a Join Now page:

1. Create a JoinNow content record and add it to your site navigation.

2. On the content record, add a General Product Display iPart. You will need a separate instance of this iPart for every Join Now product you want to use on your site.
3. Configure the iPart so that Default product to display is JOIN_NOW (with uppercase and underscore). If you have added anything else to the cycle you will need to add it to the product name here as well (for example, JOIN_NOW_STUDENT).
4. Publish the content record, and view it for any changes you may want to make to options and default selections.

   Tip: If you set up Special Pricing for membership fees, be sure to view your "Join Now" page using test users for each special pricing scenario to ensure that the fees appear as you intend.

Configuring order confirmation emails

You can customize the confirmations for iPart-based commerce by modifying its HTML template: OrderConfirmationEmailTemplate.htm. To modify this template, locate the template file in your iMIS directory:

...\NET\iparts\Commerce\OrderConfirmationDisplay\

Note: This confirmation template is not related to the Public view.

You can use these properties in your template:

General Order Information

- [OrderNumber]
- [OrderDate]
- [PurchaseOrder]
- [PaymentType]
- [NameOnCard]
- [ShipTo]
- [ShipMethod]

Line Item Data

- [ItemTotal]
- [Shipping]
- [Handling]
- [TaxAmountsLabel]
- [TaxAmounts]
- [TaxTotal]
- [GrandTotal]
- [InvTotal]
- [TransTotal]

Example customization

Here are some typical customizations you might want to make to your confirmation email:

1. Logo: After the <body> tag, insert the <img> tag that sizes and positions your logo appropriately.

   <img src="http://www.advsol.com/AM/Images/New_Design/logos/imis_15_logo.gif">

2. Message: After the final </table> tag, add a message:

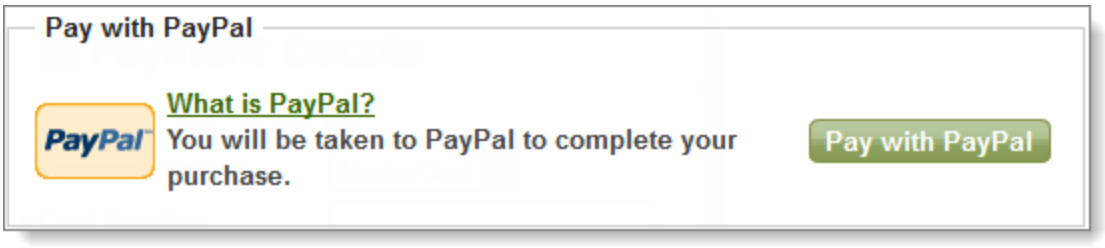
   Thanks for your Order and being a great customer! Please contact customer support for any problems at (888) 555.4354.

   Don't miss the largest gathering of iMIS Community. The NiUG Asia-Pacific Discovery Conference 26-28 October, Launceston, Tasmania. Details at www.niugap.org.

   You can take this a step further by modifying the template to strengthen your brand and messaging in the receipt for your organization. You can even use it to promote upcoming events if you are willing to change the template often.

Enabling PayPal Express

You can set up Express Checkout with PayPal to integrate with your iPart-based sites. This payment option is a convenience for your members, customers, registrants, and donors, which means more revenue for your organization.



The Pay with PayPal block appears in the Payment Creator iPart if you set up a cash account as a PayPal service.

If you are designing your own checkout pages, be sure that the Payment Creator and Submit Order Button iParts are on same page.

Creating promotion codes

You can create promotions (discount codes) that apply to the entire order, within any date restrictions that you define. Currently, a discount that applies to the entire order can only be a percentage discount. This discount applies to every order line in the cart, without type-specific exclusions.

You can also create promotions (discount codes) that apply only to specific products or product categories, and these discounts can be either percentages or fixed amounts.

To create a promotion, you need access to the Promotion Creator iPart, which enables you to create and manage promotion codes that give a percentage discount.

Applying promotions

The Promotion Manager iPart lets you make use of the discounts that you define using the Promotion Creator. It lets shoppers enter a promotion code to apply to their entire order. When the code is valid, the order lines update to the new reduced amounts. The iPart hides itself if no promotions have been defined or if the cart is empty.

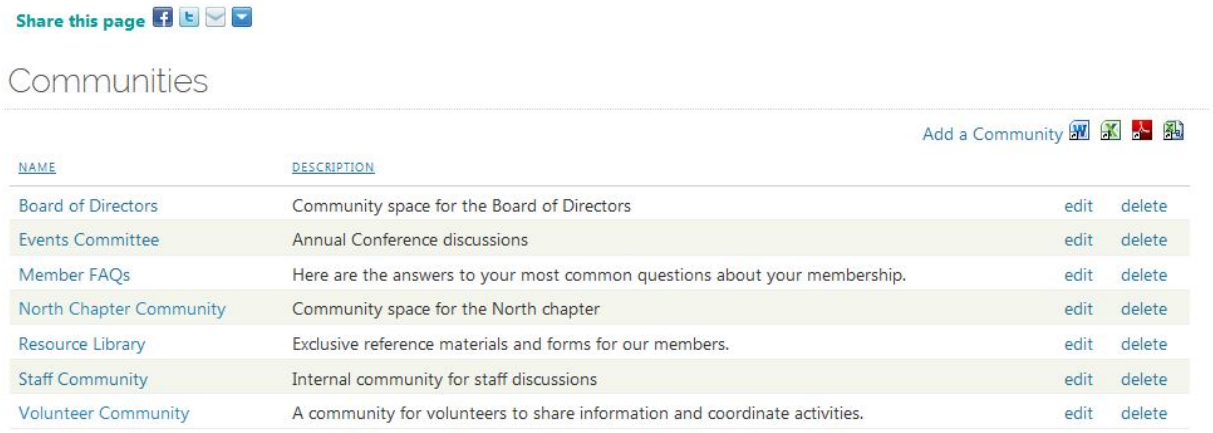
Communities

Communities Essentials

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

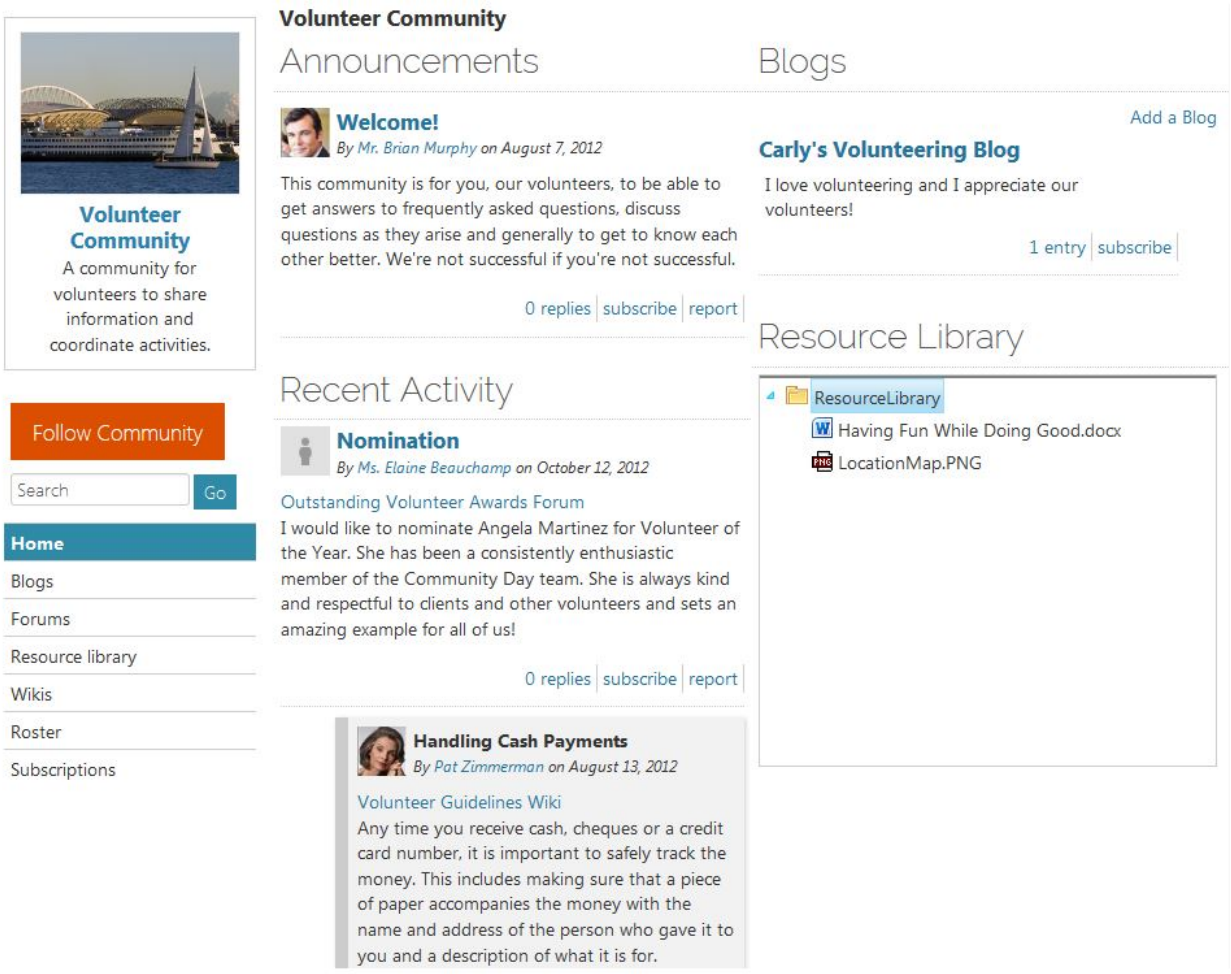
Quick facts: Communities

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



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

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



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

Communities features

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

- individuals or groups can start a blog
- linked, dated archive to previous blog entries
- subscribe for email notifications for one or all blogs
- Wikis
- supports collaborative authoring of wiki articles
- articles can have multiple authors, with online identity provided by iMIS
- subscribe for email notifications for any new or changed articles
- Community management
- each community has its own security settings
- same look and feel as the rest of your iMIS website
- subscribe to Recent Activity for updates on any and all content changes
- many choices in subscription granularity: community-level, all discussion forums/wikis/blogs, individual discussion forums/wikis/blogs, individual posts within discussion forums/wikis/blogs
- customizable email notifications
- Resource Libraries
- add documents, videos, audio files, and image files
- maximum file size is adjustable
- folders aid organization and security control
- define security permissions for the resource library the same as for the community

What are communities?

An online community lets a group collaborate on projects, share knowledge, communicate and connect with others, and stay in touch using email subscriptions.

Communities have configurable layout pages that help you manage the shared content and also manage the group that defines the community.

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

Announcements

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

Discussion Forums

Discussion forums let community members post and reply to discussions. Discussion forums contain topics, and subsequent entries on a topic are called posts. When a community member subscribes to a discussion forum, they receive an email every time that a post is added or when someone replies to a topic with a post.

Blogs

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

Wikis

Wikis are grouped collaborative web pages that enable quick editing of the pages by allowing community members to add or edit articles to the community website. Wikis allow anyone to add and edit articles, but you cannot view revision history or the original

author or subsequent edits of an article, so these are similar to a wiki. Wikis contain articles. You cannot comment on a wiki article, but you can edit one, if permissions allow. Subscribing to a wiki means that every time an article is added or edited, you receive an email message indicating what has changed.

Resource Library

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

Recent Activity

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

Subscribers

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

Using a community

Here are the basics you need to start using Communities:

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

To set your preferences

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

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

   Tip: If the subscription list is too long for you to easily find items, click the header labels to sort the columns (each click toggles between ascending/descending order).
3. Use the unsubscribe link to leave any communities or content areas (discussion forums, blogs, etc.) that you do not want to follow.

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

   To subscribe to a new community

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

   To create a post

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

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

To report inappropriate content

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

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

   The Report Inappropriate Content window appears.

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

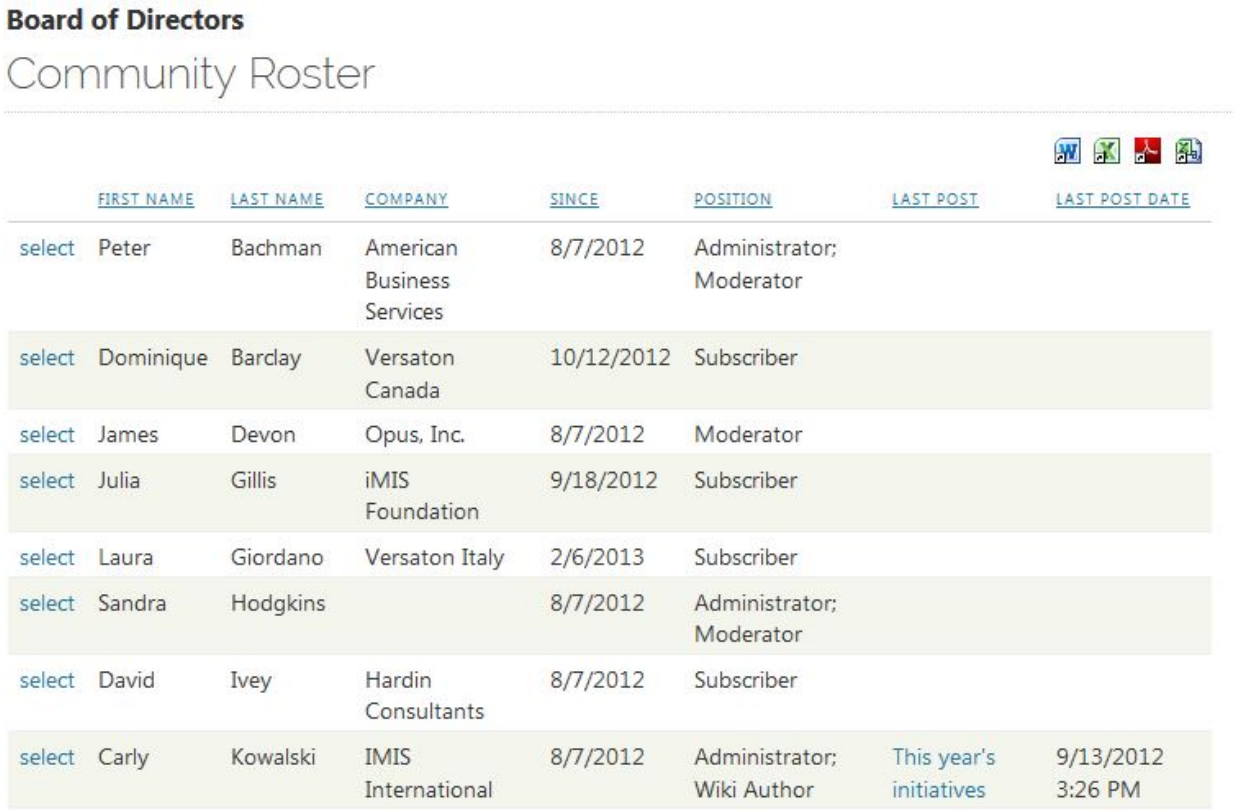
   All of your community administrators receive the email about the inappropriate content, which improves how quickly the team can respond to the problem.

   To view community subscribers

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

1. Click Communities and open a community from the Community List.
2. Click the Roster link in the left navigation to view the expanded list of community members.

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



Board of Directors

Community Roster

	FIRST NAME	LAST NAME	COMPANY	SINCE	POSITION	LAST POST	LAST POST DATE
select	Peter	Bachman	American Business Services	8/7/2012	Administrator; Moderator		
select	Dominique	Barclay	Versaton Canada	10/12/2012	Subscriber		
select	James	Devon	Opus, Inc.	8/7/2012	Moderator		
select	Julia	Gillis	iMIS Foundation	9/18/2012	Subscriber		
select	Laura	Giordano	Versaton Italy	2/6/2013	Subscriber		
select	Sandra	Hodgkins		8/7/2012	Administrator; Moderator		
select	David	Ivey	Hardin Consultants	8/7/2012	Subscriber		
select	Carly	Kowalski	IMIS International	8/7/2012	Administrator; Wiki Author	This year's initiatives	9/13/2012 3:26 PM

Creating your blog

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

To define a blog

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

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

5. Click OK.

Moderating a discussion forum

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

To verify your moderator status

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

To view discussion forum subscribers

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

1. Open the discussion forum you're interested in by clicking on its title.
2. Locate the Subscribers box under the Recent Posts (usually at right).
3. Seeing the subscribers to a discussion forum in real time gives you valuable management information, but you can do more with those subscriber lists. Use the export commands (Word, Excel, Acrobat PDF, CSV data) as needed to capture the subscriber information for other uses:

- Snapshot the subscriber information over time, for activity analysis by community administrators
- Timestamp the export files, for easy management and future reference

- Share your archives of subscriber data, to help you hand off duties to the new volunteer discussion forum moderator
- Export the subscriber data for quick mail merges, badge printing, or other service tasks by Public users

To approve discussion forum postings

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

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

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

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

5. When you find a posting needing approval, open it and scan the body of the posting for inappropriate content (according to your community's policies).

6. Select either approve or decline as appropriate.
7. While you're logged in, open any additional discussion forums you moderate.

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

Creating a wiki

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

Moderating wikis without restricted authoring

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

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

To create a wiki

1. Open the community where you want to create a wiki by clicking the community name in the community list.
2. Click Add a wiki.

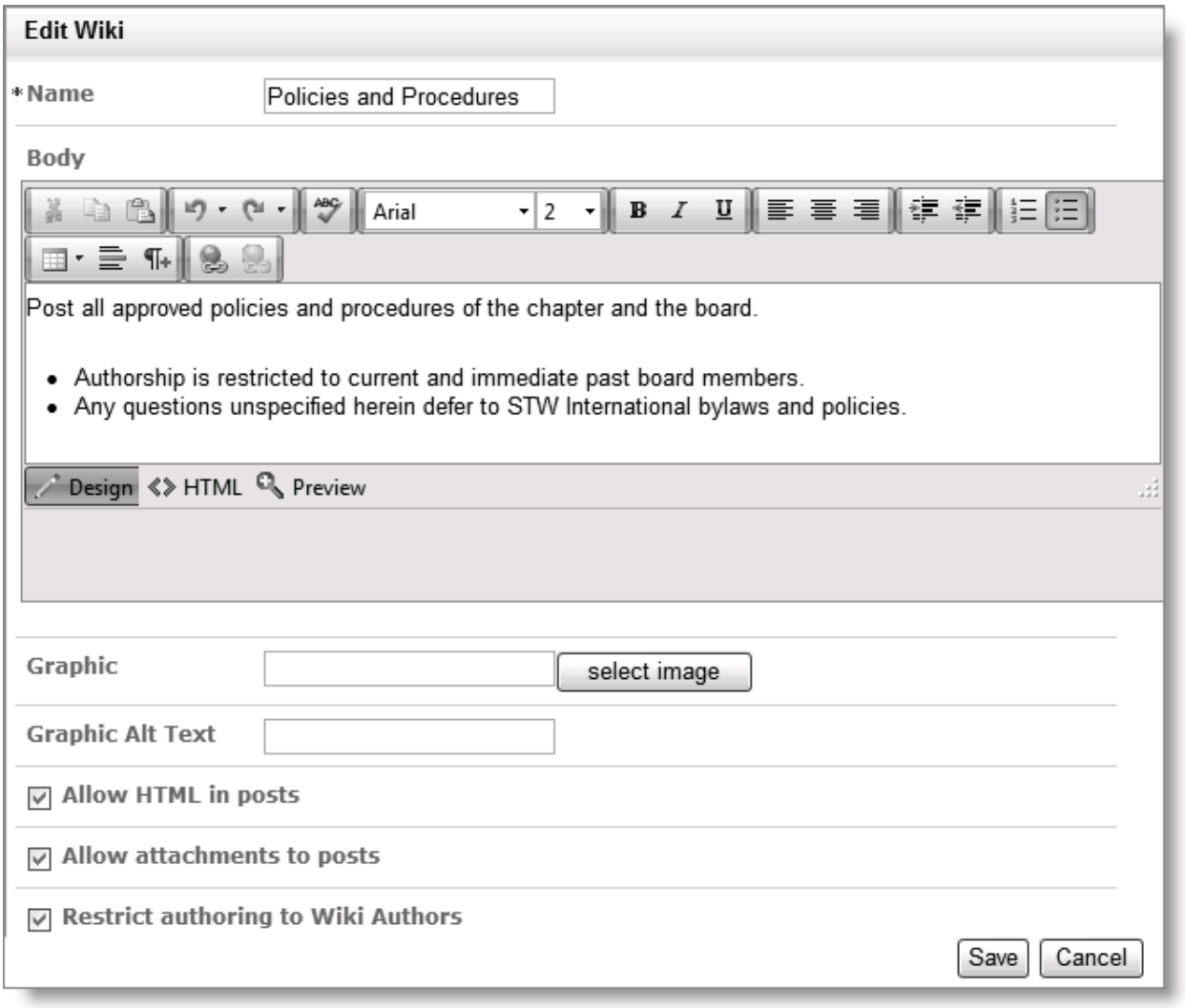
   If you do not see this link, you may need to be made a Wiki Author by your community administrator.
3. Define the wiki.

If you enable Restrict authoring to Wiki Authors but are not yourself a Wiki Author, you won't be able to edit the wiki.

4. Click OK.
5. Click Subscribe if you want to receive email notifications of all changes to the wiki.

Edit Wiki window

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



Select community link > Add a wiki

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

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

  Caution! If you use the HTML editor's built-in Image Editor to modify an image that has a transparent background, the transparent background will be replaced by solid black pixels. If you need to edit images that have a transparent background, you should save a copy of the image to your local computer and use your preferred image editing program to modify it. Then upload the new version to iMIS again, overwriting the old version if desired. The easiest way to save a copy of the image to your local computer is to right-click the image shown the Preview area of the Image Editor, and choose Save Picture As.
- Graphic - Specifies the graphic that displays in the upper left hand corner when the wiki is displayed.
- Graphic Alt Text - Specifies the alternative text that appears when the chosen graphic cannot be displayed or when you hover your mouse over the graphic.
- Allow HTML in posts - Select this checkbox to enable the HTML editor so that wiki articles can have HTML in each. If this checkbox is cleared, you enter plain text when creating articles. When you enter a URL, iMIS automatically creates a link within the wiki article, even if this selection is cleared.
- Allow attachments to posts - Select this checkbox to enable a poster to attach files separately to a wiki article, such as a PDF document or an image.

Communities Administration

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

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

Creating a community

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

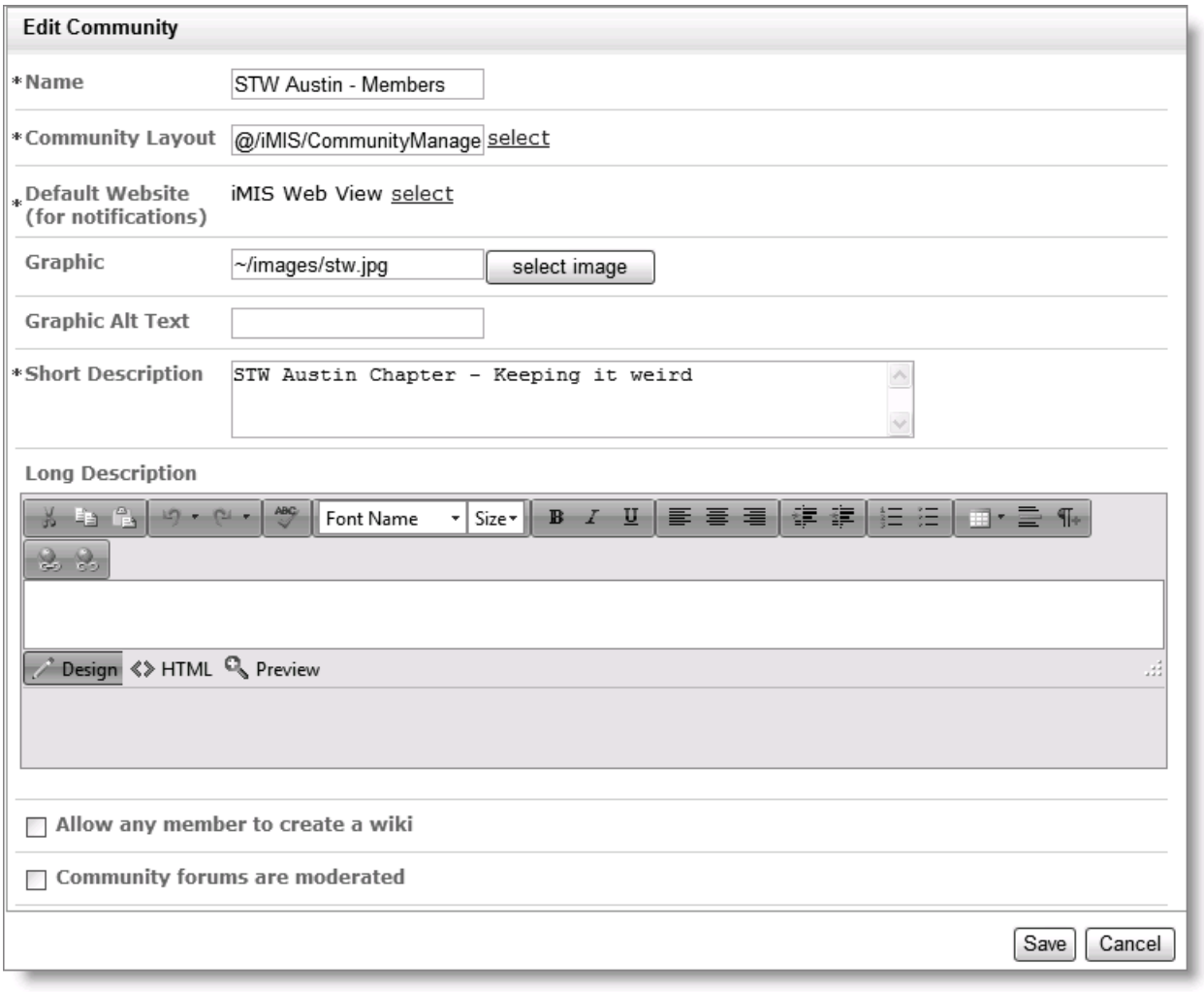
When you finish defining and populating the main structures of the community (such as its discussion forums and wikis), you are ready to change the security settings to allow members to see and use the community you created.

To start a community

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

Edit Community window

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



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

- Name - Specifies the name of the community which is displayed on the web and in email messages sent to subscribers.
- Community Layout - Specifies the content record for the community which uses a selected layout.
- Default Website - Specifies the website as defined in Content Management > Site designer > Manage websites. The website must be published (not in a Working status). This setting indicates the website users will see when clicking a link included in a

subscription notification or in a "report this post" message, so it should be a website that is accessible to all subscribers of the community. Also, do not select the iMIS Desktop View as the default website.

- Graphic - Specifies the image file displayed when readers view the Community on the web.
- Graphic Alt Text - Specifies the alternative text that appears when the image cannot be displayed or when you hover your mouse over the graphic.
- Short Description - Specifies a short description of the community and its purpose in one or two sentences. No HTML coding or CSS styling is enabled in the short description.
- Long Description - Specifies a longer description of the community and allows HTML coding or CSS styling. This description appears in the side bar on the Community main page. If you find some features of the HTML editor confusing, you can download user documentation for the editor.

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

  Caution! If you use the HTML editor's built-in Image Editor to modify an image that has a transparent background, the transparent background will be replaced by solid black pixels. If you need to edit images that have a transparent background, you should save a copy of the image to your local computer and use your preferred image editing program to modify it. Then upload the new version to iMIS again, overwriting the old version if desired. The easiest way to save a copy of the image to your local computer is to right-click the image shown the Preview area of the Image Editor, and choose Save Picture As.
- Allow any member to create a wiki - (disabled by default) Permits all authenticated users to create wikis, regardless of their community role.
- Community discussion forums are moderated - (disabled by default) Forces every discussion forum on the community to be subject to moderation, which means that posts cannot publish until a moderator or administrator approves them.

Enabling discussion forum moderation

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

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

Best practices: Controlling discussion forum postings

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

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

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

To enable discussion forum moderation

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

> **Note:** Note: Discussion forum moderation is community-wide: either all discussion forums are moderated, or none are.

1. Log on as an administrator.
2. From the Community List, click edit for the community whose discussion forums need moderation.
3. Scroll to the bottom and enable Community forums are moderated.
4. Select Save.
5. Open the community and go to Security.
6. Open the Community Moderators tab and add members to the moderation role, to help manage the additional work of discussion forum post pre-screening.

Creating announcements

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

To create an announcement

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

Managing resource libraries

To upload resource library files (Administrator)

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

   Tips

   The following information can be helpful when managing document libraries.

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

  Troubleshooting

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

Defining community membership and subscriptions

While all contacts (Full, Casual, and Public users) are members of your community (unless it was restricted), they do not receive content updates until they are subscribers. To get your community moving quickly, you can bulk-subscribe members to receive

community content by selecting their iMIS contact records and adding them to the community Roster.

To grant member-level access to a Community

1. Logon to the as a user who is a member of at least one Master Admin Content Authority Group or a member of the SysAdmin security role.
2. Click the link to the community.

   The community page displays.
3. Click the Security link in the left-hand navigation area.

   The Community Security window displays.
4. Click Show next to Access Settings.
5. Under Make this available to, select a Query from the drop-down list.
6. Click Filter.
7. Click Add to add the member to the community.

To grant administrator-level access to a Community

1. Log on as a user who is a member of at least one Master Admin Content Authority Group or a member of the SysAdmin security role.
2. Click the link to the community.

   The community page displays.
3. Click the Security link in the left-hand navigation area.

   The Community Security window displays.
4. Under Community Administrators > Select New Group Members, select a Query from the drop-down list.
5. Enter any necessary additional information, and then click Filter.
6. Click Add to add a person as a community administrator.

To add Administrators to a community (Administrator)

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

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

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

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

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

   The Community Roster appears.

2. Click Add.

   A Finder/Lister window appears.

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

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

Tips for adding multiple contacts

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

Creating a discussion forum

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

To create a discussion forum

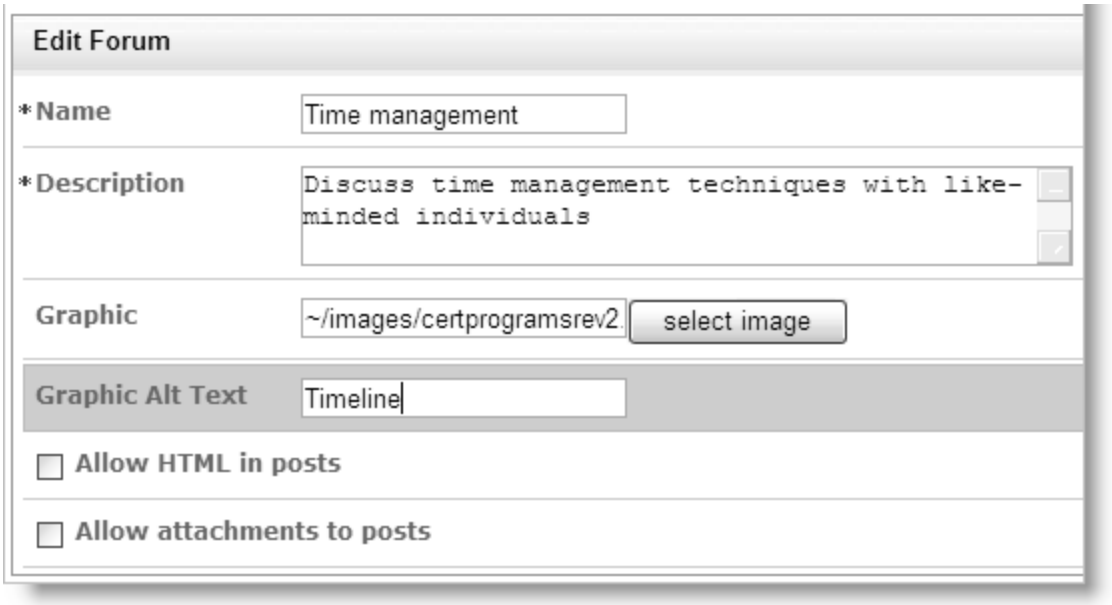
1. Log on as Community Administrator and open Communities.
2. From the Community List, select the name of the community to open it.
3. Under the Forums header, click Add a Forum.

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

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

Edit Forum window

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



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

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

even if this selection is cleared.

- Allow attachments to posts - Select this checkbox to enable a poster to attach files separately to a discussion forum topic, such as a PDF document or an image.

Adding moderators and wiki authors

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

To add moderators and wiki authors

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

To restrict a wiki to wiki authors

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

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

To enable discussion forum moderation

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

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

  See Enabling forum moderation for best practices.

Removing inappropriate posts

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

To remove an inappropriate post or comment

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

   If you cannot see the delete link, make sure that you are logged on as a moderator.
5. Confirm by clicking OK on the resulting dialog box.
6. If you deleted a post erroneously, contact an iMIS SysAdmin have it restored.

   To restore a post (SysAdmin)

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

1. Logged in as a SysAdmin, go to Tools > Document System.

2. Click the Recycle Bin, and then select the post you want to restore.
3. Click Versions.
4. Select the post version that you want to restore.

   Note: If you see an error, the reported post might have just been deleted by another administrator.
5. Click Revert.
6. Confirm by clicking OK.

Deleting a discussion forum, blog, or wiki

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

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

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

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

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

Communities Implementation

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

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

Getting started: community management

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

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

Who depends on this?

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

What must be done before you can start?

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

Putting it all together

Community management comprises two general workflows:

- The process of defining communities entails the following actions, which must be performed in the order shown:

1. Define a community. By default, a Community contains iParts that enable addition of forums, blogs, wikis, announcements, and items in a resource library.
2. Define the layout of the community's parts.
3. Define notifications for the community.
4. Manage the community roster and subscriptions.
5. (optional) Manage limitations and definitions for file attachments.

- The process of community maintenance entails the following actions, performed as needed:
- Manage security.
- Moderate conversations.
- Troubleshoot communities.

  Types of user privileges

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

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

Understanding community permissions

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

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

Forums				
Create or delete a forum	x			
Edit forum	x			
Edit forum topic	x	x		
Create or delete forum topic	x	x		x
Edit a forum topic	x	x		
Reply to a forum topic		x		x
Edit a reply	x	x		
Delete a reply	x	x		
Blogs				
Create blog	x	x		x
Delete blog	x	x		x
Edit blog	x	x		x
Create or delete blog entry	x	x		
Edit blog entry	x	x		
Comment on a blog entry	x	x		x
Edit or delete a comment	x	You must be an Admin to edit/delete comments on your entry.		
Wikis				

Create or delete wiki	x		
Edit wiki	x	x	x
Create wiki article	x	x	x
Delete wiki article	x	x	
Edit wiki article	x	x	x

Hiding and showing the Communities tab

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

To hide/show Communities

1. Select Tools > Site designer > Manage sitemaps, and select your sitemap from the drop list.
2. Click the Communities navigation item, scroll to Access Settings, enable Apply changes to all descendants, and select a new security set.

- Administrators Full Control lets you hide the tab while you implement Communities on the site.
- Authenticated Users Full Control lets you hide the tab until after members log in.
- Everyone Full Control lets the general public see the tab without logging in.

3. Save your work and Preview your changes.
4. Repeat this process for any other sites for which you want to change Communities visibility.
5. Publish when ready.

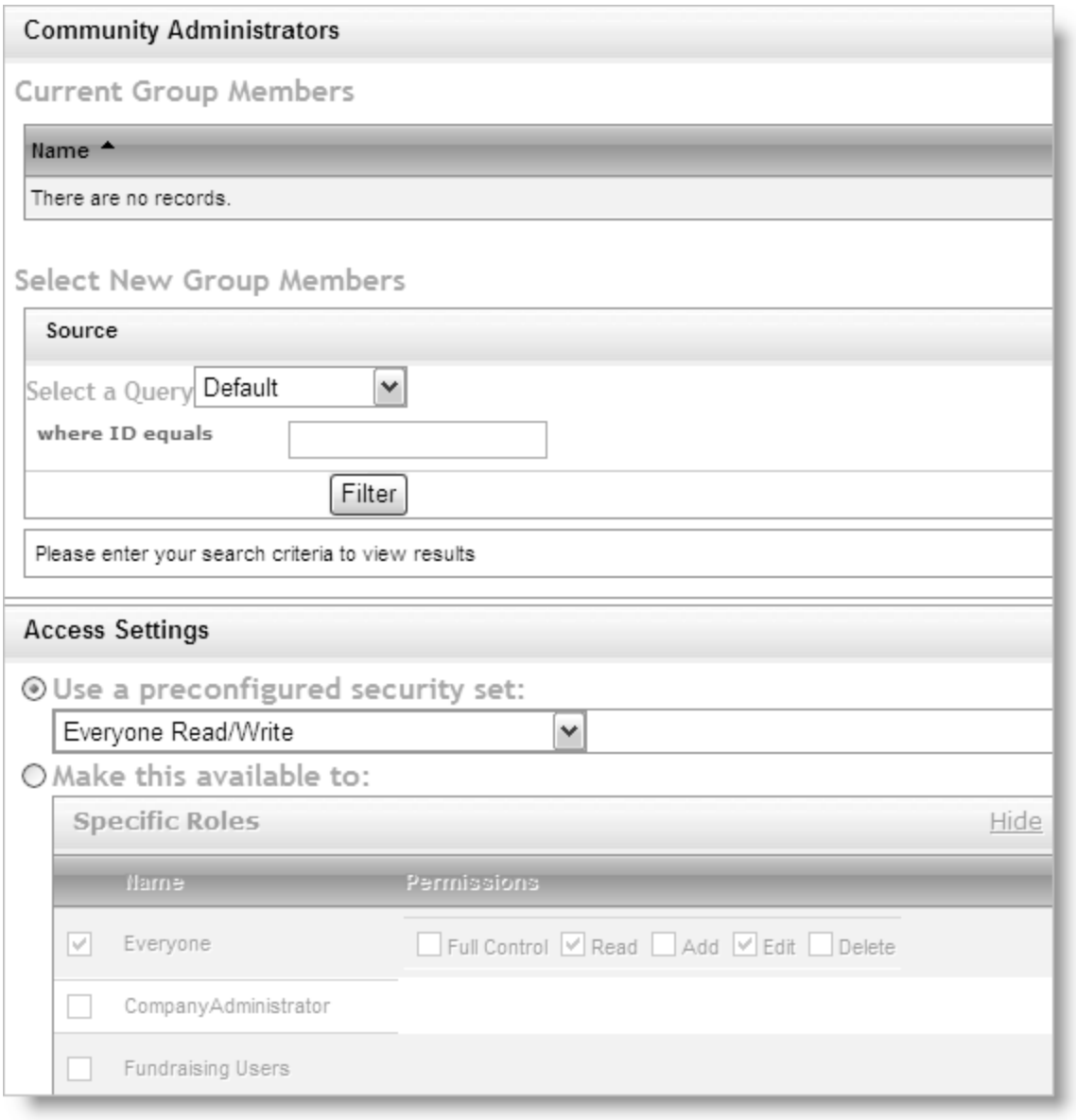
Tip:

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

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

Community Security window

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



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

Community Administrators

This area specifies selection of community administrators.

- Current Group Members - Lists the community administrators who have been added to the list. This list does not specifically display iMIS SysAdmin even though people with SysAdmin privileges appear on the community roster as Administrators.

- Select New Group Members - Specifies the search criteria for adding new community administrators.

  Access Settings

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

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

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

Defining email notifications

To define the email notification address

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

   <mailSettings>

   <smtp deliveryMethod="network" from="myorg@myorg.com">

   <network host="smtp-server.myorg.local" port="25" defaultCredentials="true"/>

   </smtp>

   </mailSettings>

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

To define the email notification message

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

   Note: Text inside of square brackets [ ] indicates a variable that changes with each message that is sent.
3. Click Save.
4. On the appserver, restart the ASIWorkflow15 service.
5. Restart IIS on the server (if your public website is installed on a separate web server) when you have made any modifications to the community notification email templates.

To configure email notifications with the Public view URL

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

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

   By default, the URL Name of this Website is populated with the same name.
5. Enter the URL of your public-facing website in the URL(s) pointing to the IIS website root field.

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

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

Tips

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

Managing attachments and uploads

To configure the allowable file types

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

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

2. Edit this line to add or remove file types in the value attributes.

   <add key="Communities.AllowedUploadFileTypes" value-
   e="DOC,PDF,TXT,HTM,HTML,GIF,JPG,PNG,RTF,ZIP,XML" />

3. Refer to the list of the allowable file types that are specified in the web.config file entry.
4. Save the web.config file.
5. Repeat this process for each iMIS appserver that hosts communities where you want to change the allowable file types.

AVI	Audio Visual Interleave
BMP	Microsoft device independent bitmap
DOC	Microsoft Word Document
EML	Outlook Express Electronic Mail
FLV	Flash Video File
GIF	GIF Image
HTM	HTML Page
HTML	HTML Page
JPE	JPEG Image
JPEG	JPEG Image
JPG	JPEG Image
MOV	QuickTime Movie
MP3	MP3 Audio
MPG	MPEG Movie
PDF	Adobe PDF File
PNG	PNG Image
PPT	Microsoft PowerPoint Presentation

RA	Real Audio File
RAM	Real Audio File
RPT	Crystal Report Template
RST	SSRS Template
RTF	RTF (Rich Text Format) File
TIF	TIFF Image
TIFF	TIFF Image
TXT	Text File
WAV	WAV Audio File
WMV	Windows Media File
WPD	Word Perfect Document
WRI	Windows Write Document
XLS	Microsoft Excel Workbook
XML	XML File
ZIP	Zip File

To increase maximum upload file size

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

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

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

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

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

3. Save the web.config file.
4. Repeat this process for each iMIS appserver that hosts communities where you want greater file sizes for attachments.

Tips

The following information can be helpful when managing file types.

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

Troubleshooting

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

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

Communities Design

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

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

Community display

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

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

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

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

Community layouts

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

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

Content records and iParts

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

An iPart is a web widget in the ASP.NET environment. As with any web widget, you choose from different types of iParts to insert in the various iPart zones in the content

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

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

To see the Communities Content Gallery, you need a COMMUNITIES license.

Defining the display of a community

To upload a graphic or image for the community

1. Log on as a user who is a member of at least one Master Admin CAG or a member of the SysAdmin security role.
2. There are two methods for opening a Community for editing:

- Choose Communities > Community List. Add a community or edit an existing community in the list.
- On the Community page, click Edit in the left-hand navigation area.

The Edit Community window appears.

3. Next to Graphic, click Select image.
4. Either browse existing files in the Document System or upload a file, then click Insert.

To choose a community layout

1. Log on as a user who is a member of at least one Master Admin CAG or a member of the SysAdmin security role.
2. There are two methods for opening a Community for editing:

- Choose Communities > Community List. Add a community or edit an existing community in the list.
- On the Community page, click Edit in the left-hand navigation area.

  The Edit Community window appears.

3. Next to Community Layout, click select.

   The Document System opens to the CommunityLayouts folder.

4. Select from one of three community layouts, or create your own content record with Community iParts, place it in the folder, and select it.

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

5. Click Save to save the community with the new layout.
6. To view the community with the new layout, click the link to the community.

   To reposition an iPart on a community

1. Go to the community page.

2. Enable the Surf-to-Edit feature: click the Surf-to-Edit (STE) icon at top right.
3. Click the Content Record icon that represents the Communities content record, typically in the upper right hand corner of the record.

   The Content Record window opens.
4. Click the blue bar of the iPart and drag it to another location in the content record.

   An insertion bar indicates where you are inserting the iPart.
5. Release the mouse button to "drop" the iPart.

   The iPart relocates to the place where the insertion bar displays.
6. If you want to remove an iPart completely, click the downward-facing triangle at the far right of the iPart's title bar, then choose Remove.
7. Save the content record.
8. Publish the content record.

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

   To style the Communities tab

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

   Tips

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

  Troubleshooting

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

Community iParts

Content Gallery Communities folder

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

Tips

- To see the Communities gallery, you need a COMMUNITIES license.
- To create a link to a content record, use a ContentReference iPart from the Content Gallery.
- Announcement Configuration – The edit screen for the Announcements forum.
- Announcements – Displays the list of announcements for a given community.
- Attachment List – The rendered list of attachments for a given item.
- Attachment Manager – Allows controlling the list of attachments for a given item.
- Blog Archive – A list of blog archive links by month and year.
- Blog Archive Entries – A list of blog entries belonging to a particular archive set.
- Blog Configuration – The edit screen for blogs.
- Blog Home – The "home view" of an individual blog. By default, this 2-column view includes recent activity and archives to the right.

- Blog List – A list of blogs for a given community.
- Blog List Item – A single blog in a blog listing.
- Comment Configuration – The edit screen for comments.
- Comment List – A list of comments for a given item.
- Comment List Item – A single comment in a comment listing.
- Community Breadcrumb – Displays the path to the current object as a breadcrumb.
- Community Configuration – The edit screen for a Community.
- Community Description – Displays the full description for a Community.
- Community List – The list of all available Communities.
- Community Recent Activity – Displays recent activity of all types for the entire community, such as new replies on forum topics, new blog entries, and new wiki articles.
- Community Roster – Displays the list of all members (subscribers and administrators) of a community.
- Community Sidebar Helper – Helper control that inserts the Community Summary into the template's sidebar.
- Community Summary – Displays the item's linked name, image, description, and relevant links.
- Entry Configuration – The edit screen for blog entries.
- Entry Home – The "home view" of an individual blog entry. By default, this 1-column view includes the complete comment thread for the entry.
- Entry List – A list of entries for a given blog.
- Entry List Item – A single entry in an entry listing.
- Forum Configuration – The edit screen for a forum.

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

Or, enter a path to a web user control

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

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

Including a Community iPart on a web page

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

- In the Definition section of a content record, click add content, then select the Content Gallery and add one of the listed iParts to the content record. (Alternatively, for an existing iPart, click the down triangle at the far right of the iPart's title bar, then choose Configure.)
- When using the Surf-to-Edit (STE), click the STE icon that relates to various iParts in the content records used in the content areas of the page. You must be logged on to the website and have Content Editor permissions in at least one content authority group (CAG).

6. Click add content.
7. Select an iPart in the Communities folder, such as Blog List.
8. Enter a name for the new content.

9. Under Community Item Key, enter the iUniformKey you copied from the URL as specified below.
10. Save the content record.
11. Publish the content record.

To locate the Community Item Key

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

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

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

iMIS

Configuration Console

Your Administrative Console includes a Configure tab, which presents quick access to the tools that your staff need most frequently in order to configure aspects of your web-sites:

Membership	Events	Fundraising
Configure membership options	Configure event options	Configure Fundraising options
Set up customer types	Set up registrant classes	Set up sender codes
Set up activity types	Set up event resources	Set up interest codes
Update area codes		Set up memorial/tribute codes
Set up country names		Set up tables
Set up country address lay-outs		
Set up state/province codes		
Set up lookup/validation tables		
Set up chapters		
Set up committee codes		
Set up committee positions		
Set up relationship types		

Billing	Commerce	Certification
Configure billing options	Configure commerce options	Configure Certification options
Set up billing cycles	Set up warehouses	Set up component categories
Set up billing products	Set up order types	Set up subcomponents
	Set up product categories	

Set up tax codes
Set up freight by weight
Set up freight by total value
Set up freight by total quant-
ity
Set up shipping zones

Configure Console

Your Administrative Console includes Configure, which offers quick access to tools your configuration staff need most frequently for configuring aspects of your websites.

Depending on your license keys, some areas might not be listed in your Administrative Configure. The license keys needed for each area are:

- Membership (MEMBERSHIP)
- Events (MEETING or WMEET)
- Fundraising (FUNDR or FUNDRAISING)
- Billing (DUES or EDUES)
- Commerce (W_ORDERS or ORDER)
- Certification (CERT or CERTIFICATION)

Membership

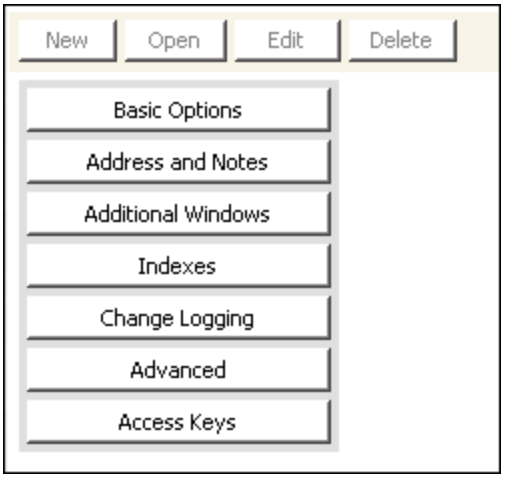
Configure membership options

Note: Several configuration options on the Configure membership options window are documented within the iMIS Desktop. Links in this section might display iMIS Desktop documentation. This saves you time and effort when configuring membership options.

Customer Management is usable out-of-the-box but is designed to be customized to your specific organization's structure and operation. For this reason, you must work with your System Administrator to set up and configure it to meet the needs of your organization. This area outlines the steps required in setting up iMIS for maintaining your customer data according to organizational requirements for:

- Basic customer options.
- Customer addresses and notes.
- Lookup information for searching with the Find window.

- Fields in the Change Log.
- Advanced customer options.



Admin Console: Configure > Membership
Desktop: Customers > Set up module > General

Basic Options

Opens the Customer Setup - Basic Options window.

Address and Notes

Opens the Customer Setup - Address and Notes window.

Additional Windows

Opens the Customer Setup - Additional Windows window.

Indexes

Opens the Customer Setup - Indexes window.

Change Logging

Opens the Customer Setup - Change Logging window.

Advanced

Opens the Customer Setup - Advanced window.

Access Keys

Opens the Customer Setup - Access Keys window.

Print

Used to generate and send a system settings report to your report destination.

Set up customer types

The Customer types window defines the categories to which you assign each customer record. These types designate the broad classification of customer categories. Assign a different type to each major customer class (Individual Member, Associate Member, Student Member, Hotel, etc.) and at least one type to the Nonmember category.

When you define a type through the table, be sure to indicate whether the type represents a customer and whether the type defines a company/entity or an individual. This helps iMIS differentiate between the different records.

To define customer types

1. From Customer types window, click New.
2. Enter a meaningful, unique code to represent a specific grouping in the Type field.
3. In the Description field, enter the descriptive, full name of the customer group that corresponds to the code you assigned in the Type field.
4. (optional) If the customer type you are defining represents a company or entity other than an individual, enable the Is a Company option.
5. (optional) If the customer type you are defining represents a member rather than a nonmember category, enable the Is a Member option.
6. Click Save.
7. Exit iMIS.

To add billing codes to customer types

1. From Customer types window, click New.

2. Enter a meaningful, unique code to represent a specific grouping in the Type field.
3. In the Description field, enter the descriptive, full name of the customer group that corresponds to the code you assigned in the Type field.
4. (optional) If the customer type you are defining represents a company or entity other than an individual, enable the Is a Company option.
5. (optional) If the customer type you are defining represents a member rather than a non-member category, enable the Is a Member option.
6. (optional) Enter the Billing Codes that were set on the Set up products window (go to Configure > Billing > Set up billing products). These entries dictate the dues products that will be automatically billed for each customer type. Only link dues products that should be billed to all customers within the type. Do not enter add-on products that are optional or that vary from customer to customer.

   Caution! Unless all line items for the type are complimentary or are to be billed zero dollars, do not insert a product in the first line that will have a zero price amount, such as a complimentary product. When a product line item is billed and a zero amount has been set, the Paid Thru date will automatically advance.

1. Enable the Comp option if the dues product will be provided at no charge (complimentary) for this customer type.
2. Enter a Fixed Amount if a fixed rate applies to all or most customers of this type.
3. Enable the Bill Company option if the parent company is to receive the bill for customers of this customer type that are linked to it.

7. Click Save.
8. Exit iMIS.

   To use wildcard product codes to update PAID_THRU date

   A special wildcard option enables you to control the overall customer term Paid Thru date when there is not a single main dues product (the product that is listed first on the Customer types window) to be billed for the customer type. In order to use the wildcard

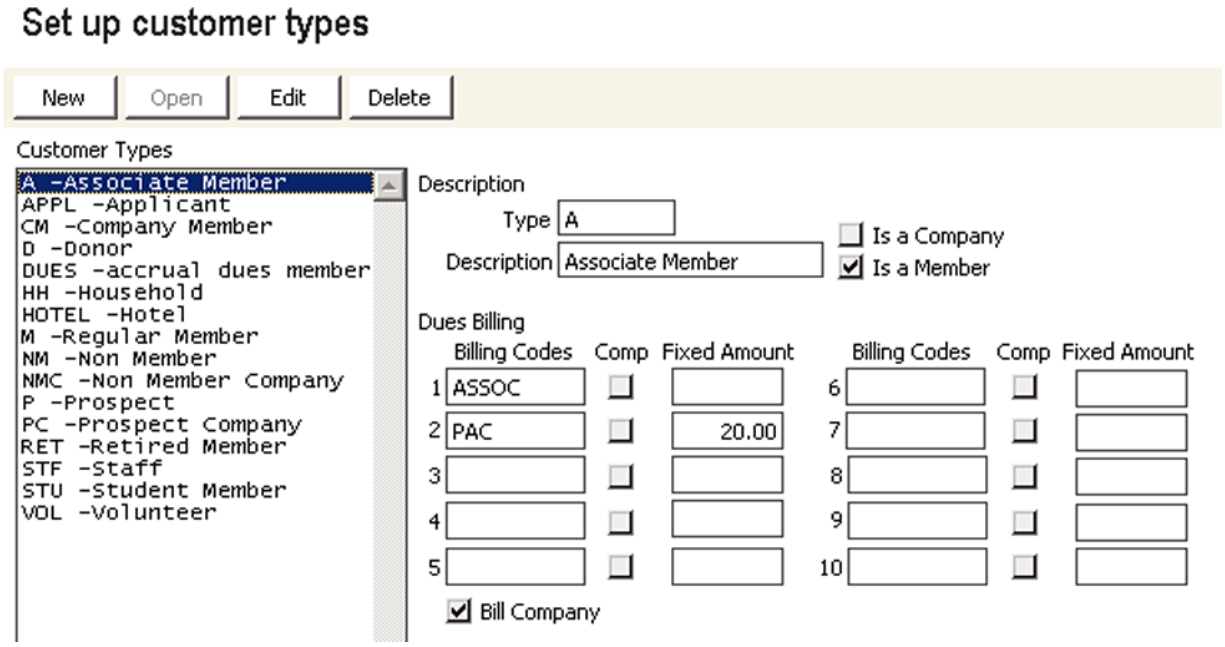
feature, all potential products, which may be used to control the customer term Paid Thru date, must be established with the same initial string of characters in their product codes. A partial product code string followed by % designates a wildcard in the first product code slot on the customer types table. This option allows different products to be the main dues product for one customer type. This feature enables ties to use dues product billing and to control the customer Paid Thru date even when there is not a consistent dues product billed to all customers.

Example

An organization bills only chapter dues products and the chapter codes vary from customer to customer. In this case, CHAPT% would be entered in the first Billing Codes field on the Customer types window because all chapter product codes automatically begin with CHAPT (for example, CHAPT-HARRIS, CHAPT-TRAVIS). Payment of the first product whose code begins with the wildcard string will update the overall customer term or name PAID_THRU date. An example of a wildcard used on the Set up customer types is shown in the following picture with the corresponding product code defined on the Set up products window. In this case, only chapter dues products are billed. Customers can join from a group of chapters. In this example, the wildcard option is used for all chapters that begin with CHAPT.

Note: The customer's overall Paid Thru date will be advanced the first time a payment is fully applied to a line item whose product code begins with CHAPT.

Set up customer types window



Customer Types

Lists the codes and descriptions for the defined customer types.

Type

Specifies a unique code to represent a specific grouping (Max. characters 5). This code corresponds to the Type field in the Manage customers window.

Description

Specifies the descriptive, full name of the customer or nonmember group that corresponds to the abbreviated type code you assigned. This description displays in the drop-down list on the Manage customers window. If the Description field does not contain a value, the value in the Type field is used.

Is a Company

Enable to indicate that the customer type you are defining represents companies or other entities rather than individuals. By enabling this option, iMIS will be able to maintain rela-

tionships between companies and individuals for the purpose of maintaining current company rosters and other related lists.

Is a Member

Enable to indicate that the group represents a customer category rather than a non-member. By enabling this option, iMIS can distinguish between members and non-members regardless of how many types or categories you maintain. This provision lets you produce quick lists, reports, and counts by members or nonmembers.

Billing Codes

Use these fields to enter up to 10 product codes for each customer type. These entries dictate the dues products that automatically will be billed for each customer type. Only link dues products that should be billed to all members within the type. Do not enter add-on products that are optional or vary from member to member.

All codes entered here display on dues bills for this customer type unless the line item bills at zero dollars and the renewal notice option to suppress the printing of zero balance line items is active.

The first product cross-referenced is the key product because it controls the advancing of the overall membership paid thru date. For best results, enter the primary dues product code in the first Billing Codes field.

Note: Unless all line items for the type are complimentary or are to be billed zero dollars, do not insert a product in the first line that will have a zero price amount such as a complimentary product. When a product line item is billed and a zero amount has been set, the paid thru date will automatically advance.

Comp

Enable if the dues item will be provided at no charge for this customer type.

Fixed Amount

Specifies a fixed rate that applies to all or most customers of this type.

Bill Company

Enable if the parent company is to receive the bill for customers of this customer type that are linked to it; for example, if a List Bill requirement exists.

Print

Used to generate and send a customer type table report to your report destination.

Set up activity types

To create an activity type

1. From Set up activity types window, click New.
2. Enter the activity category or code in the Type field.
3. Enter a Description of the activity type.
4. Enter additional prompts, if needed.
5. Click Save to update the activity type.

To edit an activity type

1. From Set up activity types window, select an activity from the Product Types column.
2. Select the activity to open it in the Set up activity types window.
3. Click Edit.
4. Make any necessary edits.

   Note: The Type field cannot be edited.
5. Click Save to update the record.

To delete an activity type

1. From Set up activity types window, select an activity from the Product Types column.
2. Select the activity to open it in the Set up activity types window.
3. Click Delete. A system message prompts you to verify the deletion of the selected record.
4. Click Yes.

To create the LETTER activity type

1. Create a new activity type using the following settings:

- Type: LETTER
- Prompts for Description, Note, and Source.
- Additional prompts, if needed.

  Note: The prompts entered in the Activity types window dictate which fields are enabled and visible in the Activity Detail and Activity Importer windows.

2. Click Save to update the activity type.

To display activity records in customer profiles

You can configure an activity type to be displayed in customer profiles. If a customer does not have an activity record for a particular activity type, then that activity type will not be displayed in the customer's profile. Activity records are grouped according to type, and you can specify the order in which the activity types display.

1. From Set up activity types window, select an activity type from the Product Types list.
2. Click Edit.
3. Enter a Profile Position to display the activity type and related activity records. You have several options:

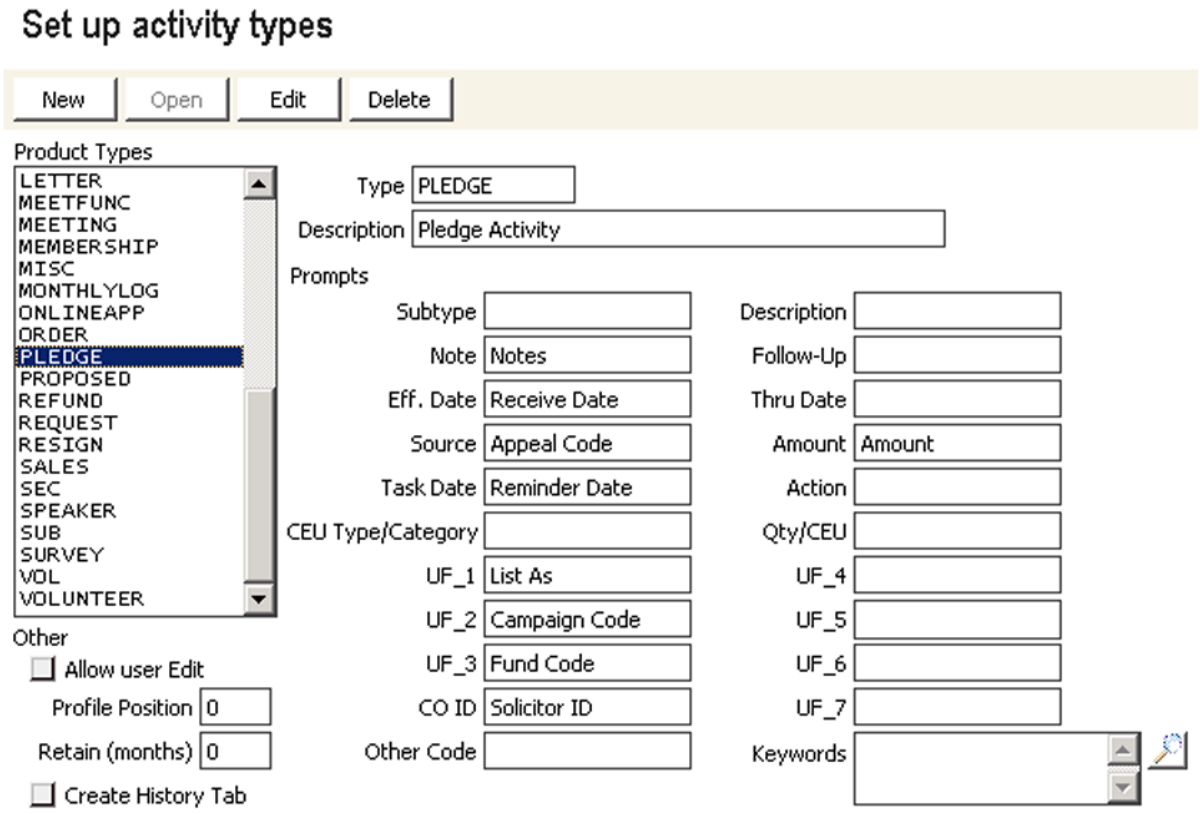
- To not display an activity type and its related activity records, enter a Profile Position of zero. The default Profile Position is zero.
- To display an activity type and its related activity records in the customer's profile, assign a number greater than zero to the Profile Position to display the activity type. For example, enter a 1 for the Email activity type.
- To sort the order in which the activity types display, enter numbers in succeeding order for each activity type. An activity type with a Profile Position of 1 will display ahead of an activity type with a Profile Position of 2, and an activity type with a Profile Position of 2 will display ahead of an activity type with a Profile Position of 3.

For example, if you want the customer's Call Log activity records to display first in the customer's profile and the customer's Award activity records to display second, enter a 1 for the Call activity's Profile Position and a 2 for the Award activity's Profile Position.

- To order the activity types alphabetically, assign the same Profile Position to each activity type. For example, enter a 1 for each activity type's Profile Position.

4. Click Save.

Setup activity types window



Product Types

Lists all of the defined activity types.

Type

Specifies an activity type prompt.

Description

Specifies a description prompt for the activity type.

Subtype

Specifies a subtype prompt.

Description

Specifies a description prompt for the subtype.

Note

Specifies a note prompt.

Follow-Up

Specifies a follow-up prompt.

Eff. Date

Specifies an effective date prompt.

Thru Date

Specifies a thru date prompt.

Source

Specifies a source prompt.

Amount

Specifies an amount prompt.

Task Date

Specifies a task date prompt.

Action

Specifies an action prompt.

CEU Type/Category

Specifies a CEU type prompt.

Qty/CEU

Specifies a CEU quantity prompt.

UF1 - UF3

Use these fields to enter prompts for the values entered in the Char 1 - Char 3 fields on the Event System Preferences window.

UF4 - UF5

Use these fields to enter prompts for the values entered in the Number 1 - Number 2 fields on the Event System Preferences window.

UF6 - UF7

Use these fields to enter prompts for the values entered in the Date 1 - Date 3 fields on the Event System Preferences window.

CO ID

Specifies the company ID prompt.

Other Code

Specifies another code prompt.

Keywords

Specifies keywords (use the lookup icon to open the Select ACCESS_KEYWORDS value(s) window and search for defined keywords.

Allow user Edit

Enable to allow users to edit activity records.

Profile Position

Specifies the profile position.

Retain (months)

Specifies the number of months the activity record will be retained.

Update area codes

The Update area codes procedure automates the mass changes that are required when a new area code has been added in an area containing many of your existing member/contact records.

To update area codes

To initiate the mass change of area codes:

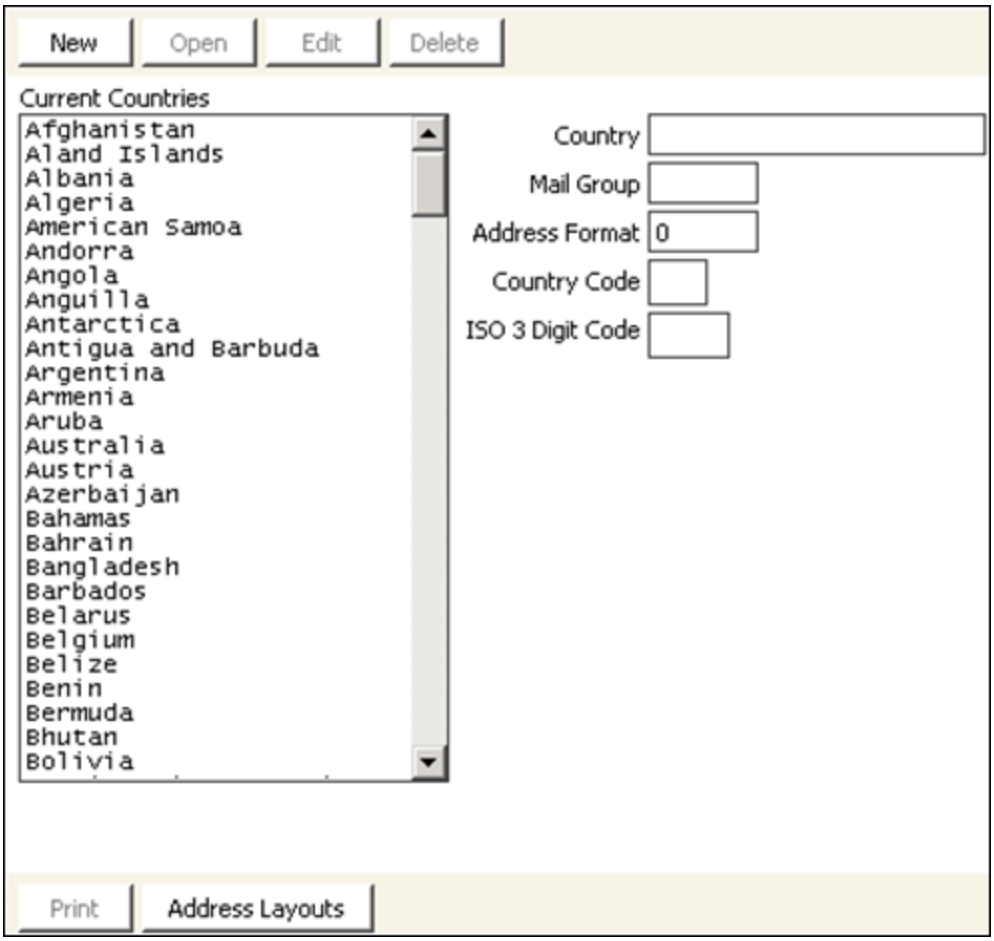
1. From Configure > Membership > Update area codes, click New.
2. Enter the Old Area Code.
3. Enter the New Area Code.
4. In Exchanges Affected, enter the 3-digit telephone exchanges of the affected telephone numbers; separate by commas and without spaces.
5. Click OK.

iMIS will look for a match in the Old Area Code and one of the Exchanges Affected listed in all telephone numbers for business, fax, and home in the profile tab in Membership.

Set up country names

The Set up country names window is used to add country records to the Country_Names table. The records entered in the Country_Names table then are linked with the

appropriate address formats that are stored in the Country_Addr_Layouts table.



Admin Console: Configure > Membership > Set up tables > Set up country names
Desktop: Customers > Set up tables > Country names

Current Countries

Lists the current countries.

Country

(required) Enter the country name in this field (Country_Names.COUNTRY).

Mail Group

This field is reserved for future use (Country_Names.MAIL_GROUP).

Note: The Mail Group field is used in the Advanced Subscriptions module for reporting purposes. You do not need to enter anything in the Mail Group field if you do not intend to separate by mail group in the Advanced Subscriptions module.

Address Format

Displays the Address Format assigned to the country (Country_Names.ADDRESS_FORMAT).

Country Code

Designates the two letter code that stands for this country.

ISO 3 Digit Code

Designates the ISO 3 digit code that stands for this country.

Address Layouts

Opens the Country Address Layouts window to view the address format that is assigned to the country.

The Country table is a combination validation/expansion table for the Country field used for customer addresses. You need to specify values, either abbreviations for expansion and/or for full country names, for all the countries in which your customers may maintain a residence, a mailing address, or a billing address.

Set up country address layouts

iMIS ships with the following address formats predefined for specific countries. For example, format 12 is applied to Bulgaria, format 13 is applied to Japan, and format 14 is applied to Korea. We recommend that you review these formats to be sure that they fit your business needs. If necessary, you can modify the formats, for example, change the format that applies to a country. For countries that have not had address formats applied to them, you will need to format address layouts and apply them to the countries.

0	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]CITY[C][S]STATE_PROVINCE[S][S]ZIP[N][U]COUNTRY

3	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]CITY[N][U]ZIP[N][U]COUNTRY
4	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[N][U]COUNTRY
5	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[N]STATE_PROVINCE[N][U]COUNTRY
6	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[S]STATE_PROVINCE[N][U]COUNTRY
7	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]CITY[S][U]ZIP[N][U]COUNTRY
8	CITY[N]ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] ZIP[N]STATE_PROVINCE[N][U]COUNTRY
9	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] CITY[N]ZIP[S][U]COUNTRY
10	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] ZIP[S]CITY[N]STATE_PROVINCE[S]COUNTRY
11	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[N][U]COUNTRY
12	COUNTRY[N]STATE_PROVINCE[N]ZIP[S]CITY[N] ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N]
13	COUNTRY[N]ZIP[S]STATE_PROVINCE[S]CITY[N] ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N]
14	COUNTRY[N]ZIP[N]STATE_PROVINCE[S]CITY[S] ADDRESS_1[S]ADDRESS_2[N]ADDRESS_3[N]

To enter an address format

1. From Set up country address layouts window, click New. The Format field automatically populates with the next succeeding format code. For example, if the last format code created was 15, then format code 16 will be entered automatically in the Format field.

2. Enter a Description for the country address format.
3. Arrange the component fields in the area located below the Address Fields field to suit the desired address layout. For example, if you want the country name to display on the first line in the address layout, press Enter before ADDRESS_1[N] to move it to the second line, highlight COUNTRY and press Ctrl+X, then press Ctrl+V.
4. Enter the formatting codes in the Address Layouts field to format the address.
5. Click Save.

To apply an address format to a country

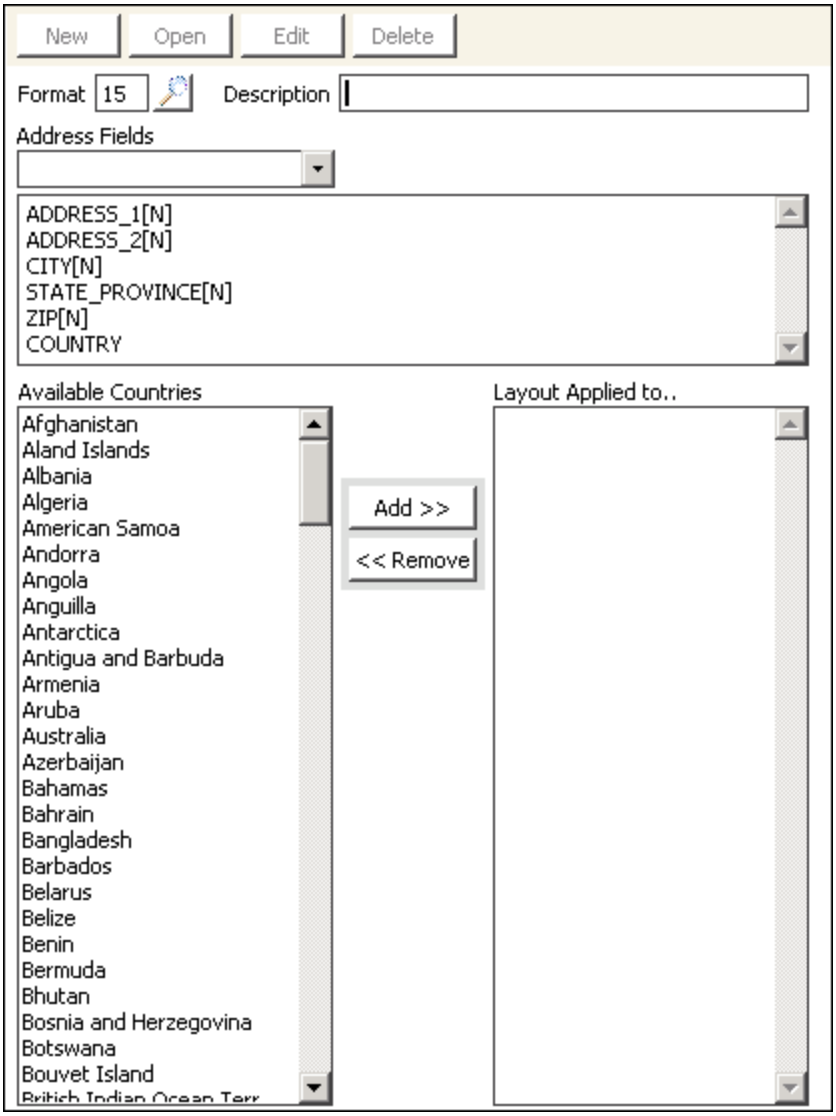
Make sure the country that you want to apply an address format to has been added to the Country_Names table.

1. From Country address layouts window, click Find.
2. Click the lookup icon in the Format field to choose the format code for the address format that you want to modify.
3. Click OK. The address format assigned to that code opens in the window. The countries for which no address formatting has been applied display in the Available Countries drop-down list.
4. Click Edit.
5. Select the country (or countries) from the Available Countries list for which you want to apply address formatting.
6. Click Add to move the selected country from the Available Countries list to the Layout Applied to list.
7. Click Save to apply the address format to the country.
8. (optional) Select Test Layout to verify that the formatted address layout produces the desired result.

The Set up country address layouts window is used to enter format codes, to modify existing format codes, to format address layouts, and to apply formatted addresses to specific

countries defined in the Country_Names table. This address format information is stored in the Country_Addr_Layouts table.

Set up country address layouts window



Admin Console: Configure > Membership > Set up tables > Set up country address layouts

Desktop: Customers > Set up tables > Country address layouts

Format

This field contains an address format code that will be auto-assigned to an address format (Country_Addr_Layouts.ADDRESS_FORMAT).

Description

Specifies a description for the address format (Country_Addr_Layouts.DESCRIPTION).

Address Fields

Use this drop-down list to select the fields that you want to use in the address format.

Use the area located below the Address Fields field to format the address layout (Country_Addr_Layouts.ADDRESS_LAYOUT). The formatted address layout combines the component fields of the address with four formatting codes:

- [U] – Uppercase. Enter [U] before a component field to make the data in the field all uppercase. For example, [U]CITY would generate all capital letters for a city such as NEW YORK or LONDON.
- [N] – New line. Enter [N] after a component field to insert a carriage return. For example, ADDRESS_1[N] would generate a carriage return and place the next component field on a different line in the address.
- [S] – Space. Enter [S] after a component field to insert a space between component fields. For example, [U]STATE_PROVINCES[S][U]ZIP would display as TEXAS 75208 when generated in an address.
- [C] – Comma. Enter [C] after a component field to insert a comma between component fields. For example, CITY[C][S][U]STATE[S][U]ZIP would display as Dallas, TEXAS 75208 when generated in an address.

Available Countries

Lists the countries that have not had address formats applied to them.

Note: Countries must be entered on the Country names window before they will be available for address formatting.

Add

Used to move selected countries from the Available Countries list to the Format Applied to list. This action is part of the process of applying an address format to a country.

Remove

Used to move selected countries from the Format Applied to list to the Available Countries list. This action is part of the process of removing an address format from a country.

Layout Applied to

Lists the countries for which address formatting has been applied.

Test Layout

Opens the Address Layout Tester window that is used to verify that an address is formatted correctly.

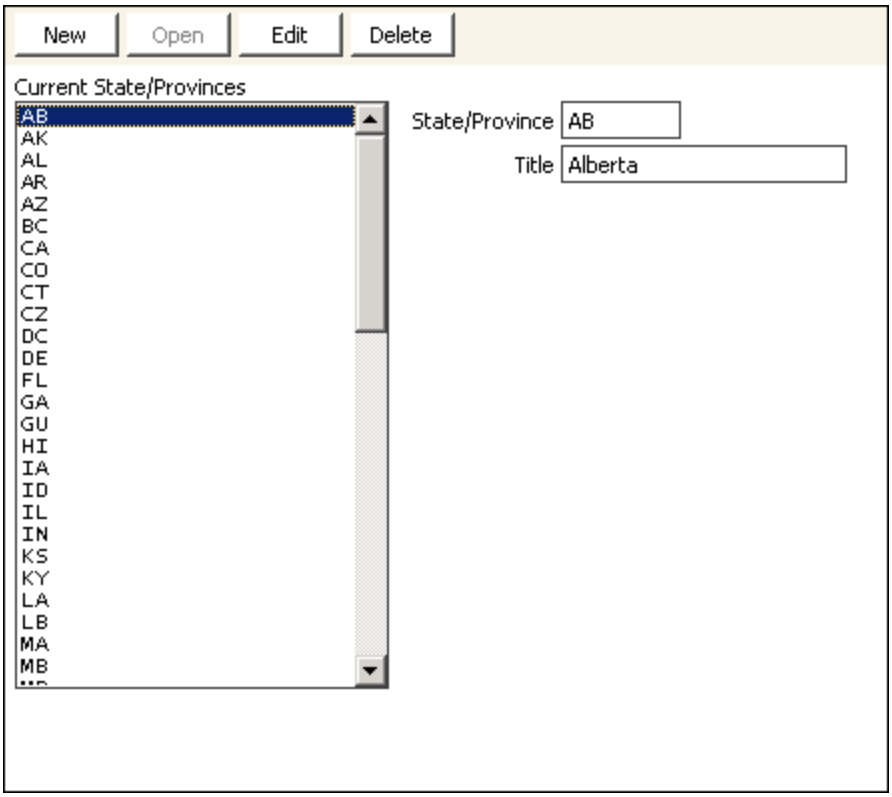
Set up state/province codes

The State_Code table is a combination validation/expansion table for the St/Prov field used for customer addresses. This table is preloaded with all 50 two-character state abbreviations and full name descriptions. It also contains valid codes for the District of Columbia, other related U.S. regions, and Canadian provinces. You can add any entries you need.

To define state/province codes

1. From Set up state/province codes window, click New.
2. Enter the code for the state/province you want to add to your validation/expansion table in the State/Province field.
3. Enter the full name of the state/province in the Title field.
4. Click Save.

Set up state/province codes window



Admin Console: Configure > Membership > Set up tables > Set up state/province codes
Desktop: Customers > Set up tables > State/province codes

Current State/Provinces

This field contains a list of defined state/province codes.

State/Province

Enter the state/province code in this field.

Title

Enter the full name of the state/province in this field.

Set up lookup/validation tables

iMIS enables you to create and add to validation and expansion tables for many fields of the iMIS interface. iMIS comes with built in links between many of its standard fields, and

you can create validation tables for any of your user-defined demographic or list-string fields.

Guidelines for populating tables

When working with lookup/validation and expansion tables, keep the following guidelines in mind:

- Do not use special characters in the Code or Expansion fields when creating general look-up/validation tables.
- The Code field on the Set up lookup/validation tables window can hold up to 60 characters. However, the general lookup/validation tables used for various fields in iMIS have varying field length requirements. Before adding Code values to a general look-up/validation table, you should determine the maximum length of the field to which the general lookup/validation code is connected. If you add a Code that is longer than the field length requirement for the field to which it connects, the data will be truncated, or in the case of certain tables, the value will not be shown as an available option.
- If the length of the Code field for the following general lookup/validation tables is greater than the defined field length, the value will not display in the drop-down as an available option:
- CATEGORY
- MAIL_CODE
- MEMBER_STATUS
- SIC_CODE
- STATUS

Note: Refer to the latest Alpha Table Layouts for field lengths.

- The value that is displayed in a drop down list or in a select window is determined in the following way:
- If a Description is defined, the Description is displayed.

- If no Description is defined, but an Expansion is defined, the Expansion is displayed.
- If neither a Description nor an Expansion are defined, the Code is displayed.
- The value that is saved after a user selects a value from a drop down list or select window is determined as follows:
- If the value in the general lookup/validation table has an Expansion value, the Expansion value is saved.
- If the value in the general lookup/validation table does not have an Expansion value, the Code value is saved.
- The Description value from the general lookup/validation table is never saved as the result of a selection from a drop down list.

  The value that is saved is the value that is displayed in the window that calls the drop down list or select window.

  The following are exceptions to the values that will display in a drop-down list:
- The SIC field on the Other tab will always display the Code field values defined in the SIC_CODE general lookup/validation table.

  Tables that provide validation

  The table validation feature enables you to assure that everyone within your organization uses the same codes to designate the same thing by either checking entered values against a list of approved values (validation) or by providing a fixed list of values from which users must choose (lookup).

  For example, the STATE_CODES table comes preloaded with state and regional two-character abbreviations, and iMIS rejects entries in the St/Prov field that fail to match those in the table. While you are entering or editing a field linked to a table, you can view a selection window of the available table values through the lookup feature.

  Tables that provide expansion

Expansion tables provide input replacement for specified fields. With this keystroke-saving technique, the user enters an abbreviation for a field, and the table look-up replaces it with the associated replacement text. This feature is useful for fields that commonly contain the same text. For example, the Prefix field can expand abbreviations in data entry according to the PREFIX table: entering m expands to Mr., entering p in the Title field expands to President, entering vp expands to Vice President.

List string fields will only validate against a table if and when a general table is linked to the field. With a few fields, iMIS uses the table for expansion only (in which case the table associates abbreviations and expanded text) but does not restrict the text that users can enter. For example, the TITLE table expands vp to Vice President but it will not keep you from entering a new title that is not in the table, such as Sales Representative.

Tables that expand and validate

Some fields are set to use a table for both expansion and validation. For example, the PREFIX table provides abbreviated entries and restricts the text to one of the field values (or blank). When using combination tables, be sure to enter both the valid abbreviations and the full field values as codes so that both types of text entries will be accepted (validated).

When setting up tables on the Set up general lookup/validation window to provide lookup choices and validation during data entry for coded fields such as Prefix, you should enter values for Expansion or Description that are different from the specified Code to prevent duplicate values from displaying in your drop-down lists. For example, if you enter Dr. as the Code and Dr as the Expansion, you will have a duplicate in your list.

Note: Leave the Expansion values blank for lookup/validation tables that you create unless you are sure that you need expansion. Entering expansion values when they are not necessary may cause problems with some lookup/validation fields in the iMIS interface.

Note: Most lookup and validation fields limit input to values defined in their associated tables. Be sure to define all of the codes that your users will need when you set up look-up/validation tables.

To create a general lookup/validation table

When creating general lookup/validation tables, keep the tables as small as possible to optimize system performance on lookups.

The values or selections defined in a general lookup/validation table display in a drop-down list.

Note: In order for Prefix and Suffix data to show up in the Web view and Public view, the Expansion field must be populated. Otherwise, prefix and suffix information only displays in the iMIS Desktop view.

1. From the Set up lookup/validation tables window, select (New Table) from the list. A window opens and prompts you for the new table name.
2. Enter the exact table name in the window.
3. Click Save to insert the new table into the table list.
4. Populate the new table:

1. Click New.
2. Enter a value in the Code field.
3. If you are creating an expansion table, enter a value in the Expansion field.

   Caution! When creating a general lookup/validation table, leave the Expansion field blank. Entering a value in the Expansion field of a lookup validation table can prevent iMIS fields tied to the table from working properly and may prevent iMIS from saving the correct data from fields populated by the table.
4. Enter a Description. The value entered in this field is displayed in lookup windows and drop down lists.
5. Click Save.
6. Repeat until you have entered all of the lookup/validation values.

   To import files into a general lookup/validation table

iMIS allows you to import tab delimited files into a general lookup/validation table. The import process requires that the file be tab delimited and contain a Code, Expansion, and Description.

1. From the Set up lookup/validation tables window, select (New Table) from the list. A window opens and prompts you for the name of the new table.
2. Enter the name of the new table in the window that displays.
3. Click Save.
4. Select Import to display the Importing Tab Delimited Tables window.
5. Click Continue to display the Select import file window.
6. Navigate to your import file, and click Open.
7. When the import is complete, a dialog box will prompt you to select an additional file.

- Click No to end the import process.
- Click Yes to import another tab delimited file.

8. When complete, the Set up lookup/validation window is displayed.

To delete a general lookup/validation table

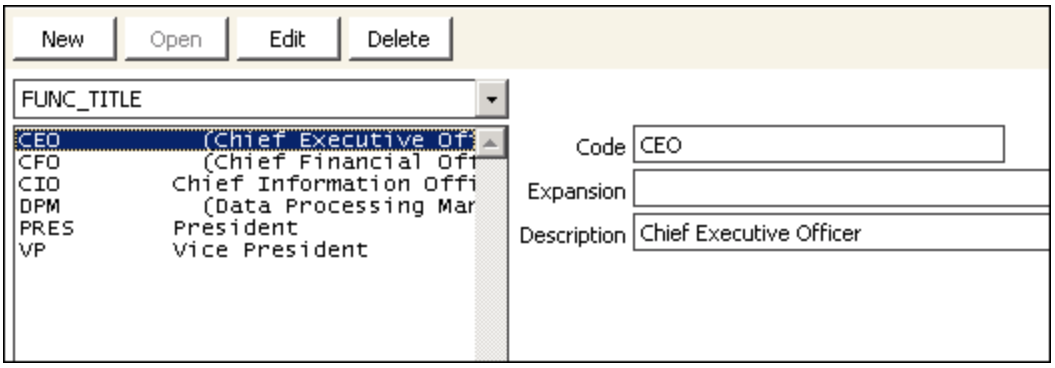
Note: A general lookup/validation table is automatically deleted when no codes exist for the table. Follow the steps outlined below to delete each code you have defined for the table you wish to delete.

1. From the Set up lookup/validation tables window, select the table to be deleted from the table name list. The table's code, expansion, and description values are displayed in their respective fields.
2. Delete all of the codes from the table:

1. Select a Code to delete.
2. Click Delete. A system message prompts you to verify the deletion of the selected record.

3. Click Yes.
4. Repeat until you have deleted all codes from the table.

Set up lookup/validation tables window



New

This field creates a new value for the currently selected table.

To create a new table, scroll to the bottom of the table list and select New Table.

Tables

Displays a drop-down list of the lookup/validation tables established for your system. When you select a table, the code and description you have defined for the table display in the window below the drop-down list.

Code

Specifies the codes (up to 60 characters) for the lookup/validation tables you are defining for your system.

Expansion

Specifies the Expansion value that will be substituted for its Code.

Description

Specifies the description of the code you are defining for your system.

Print

Used to generate and send a general lookup/validation table report to your report destination.

Import

Used to import tab-delimited files into a general lookup/validation table.

Set up chapters

Setting up Chapter Management consists of the following:

- Setting field prompts
- Defining chapter codes

Once setup is complete, you can enter the chapter enrollments for anyone maintained in your customer database.

To use the chapter-tracking feature, your administrator must specify a Chapter Prompt field on the Customer Setup - Basic Options window.

If needed your administrator can also establish a hierarchical structure of up to three levels for your chapters by specifying group prompts on the Customer Setup - Basic Options window. For example, if your chapters are grouped by region, the proper region for the chapter can be designated. This will let you group customers by region on reports, searches, and so forth. With this added capability, you can produce detail or summary reports by region with the information sorted by region overall, and by chapter under that.

To set chapter prompts

1. Go to Configure > Membership > Configure Membership Options.
2. Click Basic Options to open the Customer Setup - Basic Options window.
3. Click Edit.
4. Enter a Chapter Prompt for tracking customers who belong to a particular chapter.
5. (optional) Enter a prompt in the Group 1 Prompt, Group 2 Prompt, and Group 3 Prompt fields. The prompts you define display between the Name and Short Note/Address fields

on the Chapters window (go to Configure > Membership > Set up tables > Set up chapters). These groups allow you to specify and maintain hierarchies among your chapters, which facilitates targeted mailings and reporting. Examples of groupings include countries or regions, states, and counties and cities.

6. Click Save.

Defining chapter codes

With the Chapter Codes table, you can easily track chapter members through iMIS. To maintain chapter designations, you only have to set up a table of chapters and enter a chapter code for relevant customers in your file. The chapter table entry can be as simple as a chapter code and a chapter name, but you can add additional information such as an address or a note.

To define a chapter code

1. From Set up chapters window, click New.
2. Enter an abbreviation for the chapter in the Code field.
3. Enter the full name of the chapter in the Name field.
4. (optional) Enter a code in the three fields between the Name and Short Note/Address fields.
5. (optional) Enter a note or address for the chapter in the Short Note/Address field.
6. (optional) Enter a note for the chapter in the Notes field.
7. Click Save.

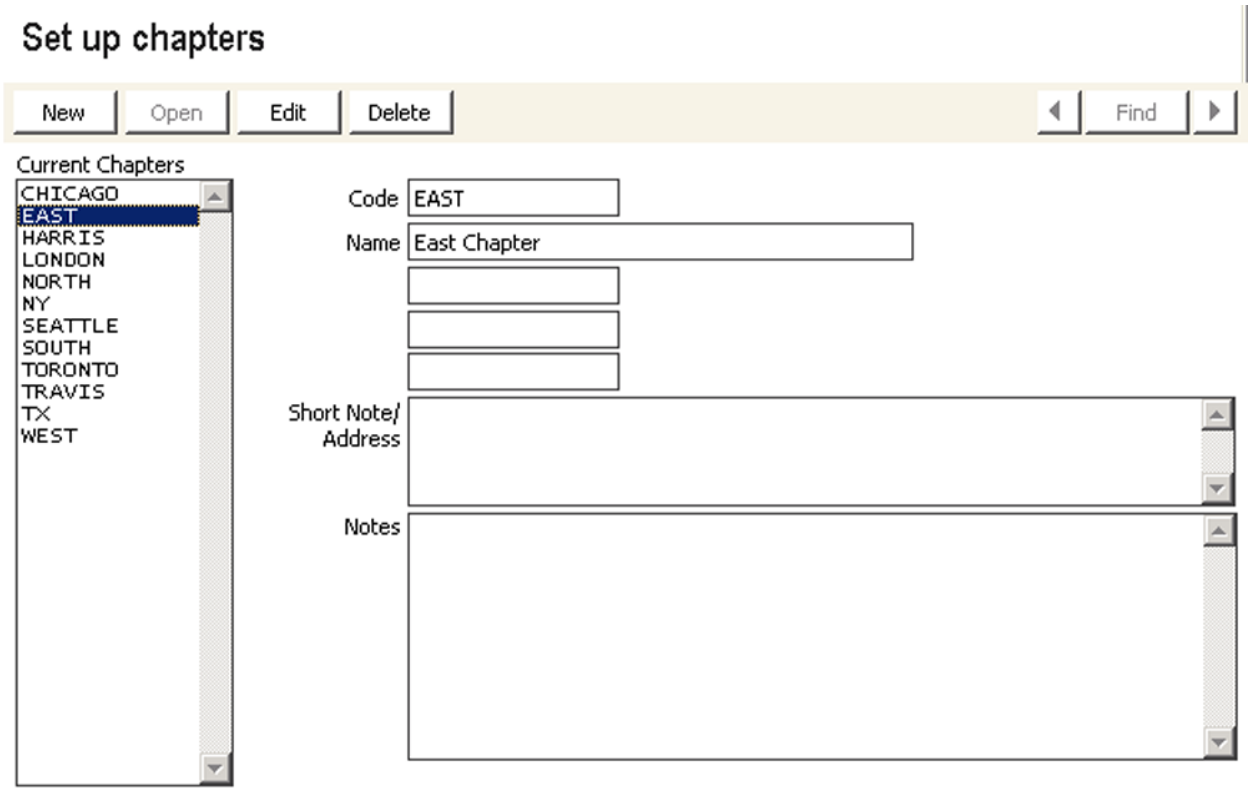
To modify a chapter code

1. From Set up chapters window, select the Chapter code you wish to modify.
2. Click Edit.
3. Edit the fields you wish to change.
4. Click Save.

To delete a chapter code

1. From Set up chapters window, select the chapter code you wish to delete.
2. Click Delete.

Set up chapters window



Admin Console: Configure > Management > Set up tables > Set up chapters
Desktop: Customers > Set up tables > Chapters

Current Chapters

Lists the codes assigned to each chapter.

Code

(required) Use this field to assign a unique code to each chapter. This field holds a maximum of 15 characters.

Name

Use this field to assign a name to each chapter.

Chapter prompts

Specify codes for three groups that correspond to the chapter hierarchy. You define the labels that display for these fields on the Customer Setup - Basic Options window

- Use the first field to enter a code for the highest level grouping of your chapter hierarchy (if applicable). For example, if you have a chapter organizational structure containing several sub-groupings, the Region code could represent the highest level.
- Use the second field to enter a code for the second-highest level grouping of your chapter hierarchy (if applicable).
- Use the third field to enter a code for the third-highest level grouping of your chapter hierarchy (if applicable).

Short Note/Address

Specifies miscellaneous notes about a chapter, as well as an address for the chapter.

Print

Prints information stored in the Chapter Description table.

Set up committee codes

To define committee codes

For each committee in your customer system, you must define an alphabetic committee code and a title for the committee that you are setting up in the Committee Codes table. Define committee codes and assign committees to groups after defining the committee groups.

1. From Set up committee codes window, click New to create a new committee code, or select an existing committee code from the Current Committees list and do the following:

- Click Edit to modify the committee code.
- Click Delete to remove the committee code.

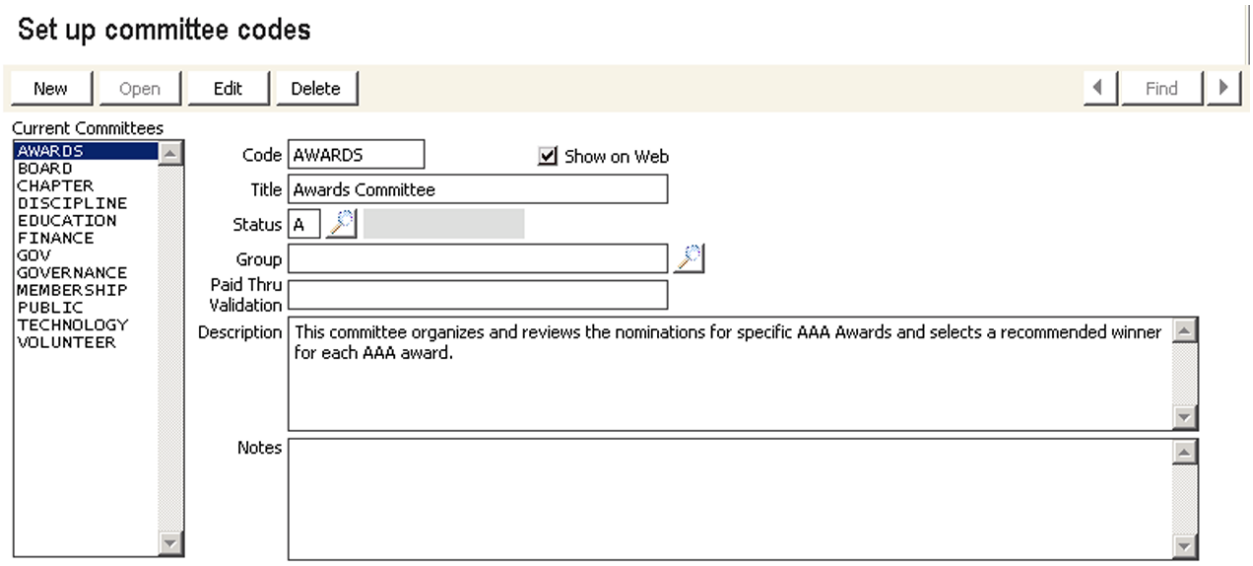
2. Specify the committee code information.
3. Click Save.

To change a committee status

1. From Set up committee codes window, select the committee from the Current Committees list whose status you want to change.
2. Click Edit.
3. Enter I for Inactive in the Status field.
4. Click Save. A warning message box displays.

   Note: When you change a committee to inactive, iMIS searches the Activity table for any committee members with a Thru date greater than today. If any are found, iMIS will notify you and ask if you want those Thru dates automatically changed to yesterday's date. If you answer yes, iMIS will set those activities' Thru dates back to the previous day's date.
5. Click Yes.
6. Click Save on the Committee codes window.

Set up committee codes window



Admin Console: Configure > Membership > Set up tables > Set up committee codes
Desktop: Customers > Setup tables > Committee codes

Current Committees

Lists the codes assigned to each committee.

Code

Specifies a unique code for each member. The maximum length is 15 characters.

Show on Web

Enables all committees and committee members associated with this committee code to be listed on the Committees page of the Public view components site. Clear this check-box to prevent the associated committees and committee members from being listed.

Title

Specifies a descriptive name for the committee. The maximum length is 60 characters.

Status

Use this field to identify the status of the committee as A for active or I for inactive. If you wish to discharge a committee, set its status to I for inactive. Click the lookup icon to select an available value.

Note: To use the search feature, the COMMITTEE_STS general lookup/validation table must be set up.

Group

Use to collectively group related committees together. Click the lookup icon and select an available value.

Note: To use the search feature, the COMMITTEE_GROUP general lookup/validation table must be set up.

Paid Thru Validation

Specifies a validation code that links a committee to a dues-product code for a given chapter or area. This field is used to verify that a potential committee member has purchased the required chapter or area dues-product. Click Edit to see a drop-down list of available chapters.

Description

Describes the purpose of the committee. This description is displayed in the committee roster and is available for printing on other reports. The maximum length is 255 characters.

Notes

Stores miscellaneous notes that are printed on reports and directories. The maximum length is 32,000 characters.

Print

Prints information stored in the Committee Codes tables.

Set up committee positions

To define committee positions

After setting up the Committee Codes table, you must set up the Committee Positions table before you can enter committee appointments. In the Set up committee positions window, you assign a code, a description, and a rank (order indicator) for each position that might be held within any committee.

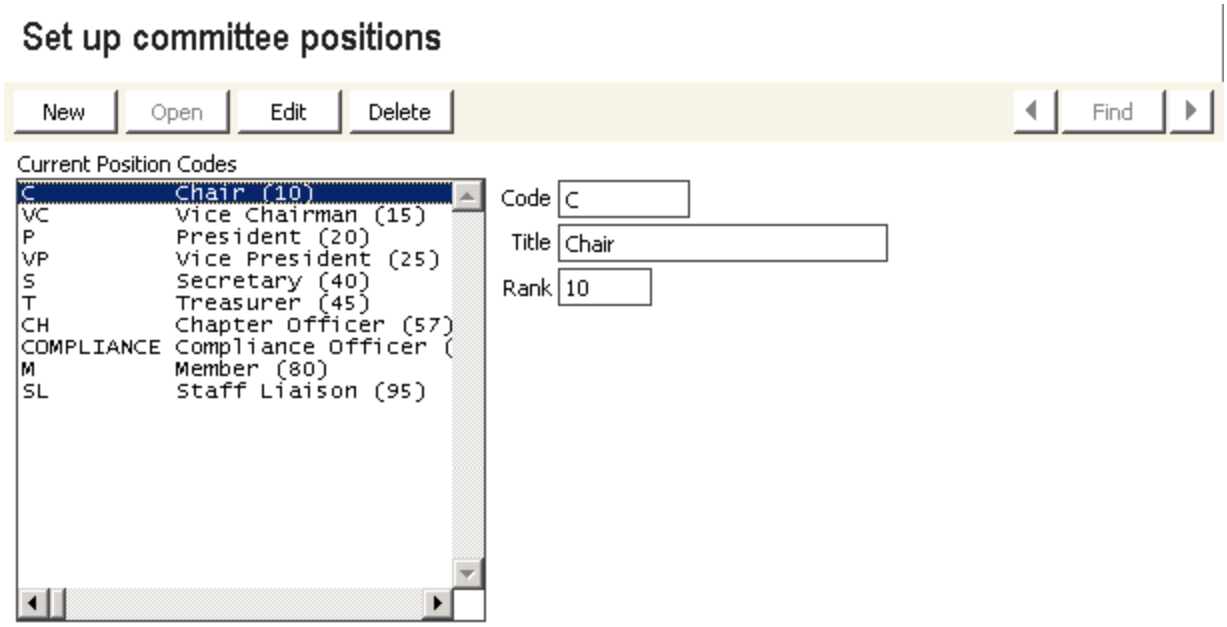
1. From Set up committee positions window, click New.
2. Enter a code in the Code field that represents the position you are defining.
3. Enter the descriptive name for the committee position in the Title field.
4. (optional) Enter a unique number that represents the order of importance in the Rank field.
5. Click Save.

To set committee options and membership duration

By default, iMIS sets the membership duration (the date represented in the Thru field in the Manage committees window) to 12. For example, when you type a date in the From field, the Thru date will default to 12 months from that date.

1. Go to Configure > Membership > Configure Membership Options and click Advanced to open the Customer Setup - Advanced window.
2. Click Edit.
3. Set up the options and customer duration for your committees.
4. (optional) Enter labels in the Minutes 1, 2, 3, and 4 Prompts for options that activate in the Minutes window. The option(s) activate in the Minutes window only when a label is entered in a Minutes Prompt field in the Customer Setup - Advanced window.
5. (optional) Enter the number of months in the Default Duration (months) field that you want iMIS to use when calculating the default Thru date in the Manage committees window. To indicate that the committee appointment does not expire, leave this field blank or set it to 0.
6. (optional) Enable the Use Co ID Hierarchy option to link a committee to the ID of a company record. A sub-set of customers associated with the company branch of the committee is created.
7. Click Save.

Set up committee positions window



Admin Console: Configure > Membership > Set up tables > Set up committee positions
Desktop: Customers > Set up tables > Committee positions

Current Position Codes

Displays the various positions that can be held within any committee.

Code

Specifies a code that represents each position that can be held within any committee. Create codes to represent all committee appointees, even those who do not hold officer-level positions. Characters entered in this field are capitalized automatically.

Title

Specifies the descriptive name for the committee position.

Rank

Specifies a unique number that corresponds to the order in which you want committee members who hold this position to display on committee rosters and other related reports. For example, enter 1 for the Chair (to display first on the roster), enter 2 for the next most

important position, and so on. Assign the highest number to the lowest position such as a regular committee member.

You can reassign these ranks at any point, but in order to more easily add new positions in the future, you may wish to skip numbers between ranks. For example, if Chair is ranked as a 1, enter a 3 for the second most important position. If you do not enter a rank, iMIS sorts the members in alphabetic order.

Print

Used to print information stored in the Committee Position tables.

Set up relationship types

Use the Set up relationship types window to add, edit, and delete relationship types.

Configuring Relationships

In order to use the Relationships module, you must set up a GROUP_CODE general look-up/validation table.

To add a new relationship type

1. In the Set up relationship types window, click New.
2. In the Code field, enter a value that you want to use to represent the relationship.
3. In the Description field, enter information that describes the relationship. The description displays on the Relationship Detail window for this code.
4. (optional) If desired, enter the code for the relationship you want linked to your new relationship type in the Reciprocal Code field.

   Note: If you leave the Reciprocal Code field blank for relationship type, two contacts connected with that relationship type will be displayed with that same type.
5. (optional) Enable the Use Title option if you want to display the Title and Functional Title fields in the Relationship Detail window.

6. (optional) Enable the Use Dates option if you want to display fields for beginning (From) and ending (Thru) dates of the relationship in the Relationship Detail window.
7. Click Save.

To edit a relationship type

You can change the Description, Reciprocal Code, and the Use Title or Use Dates options for any of the standard relationship types that are shipped with iMIS, and you can edit any customized relationship types that you created.

1. In the Set up relationship types window, select a code from the list of relationship types.
2. Click Edit.
3. Enter the new information.
4. Click Save to save the changes, or click Cancel to cancel your changes.

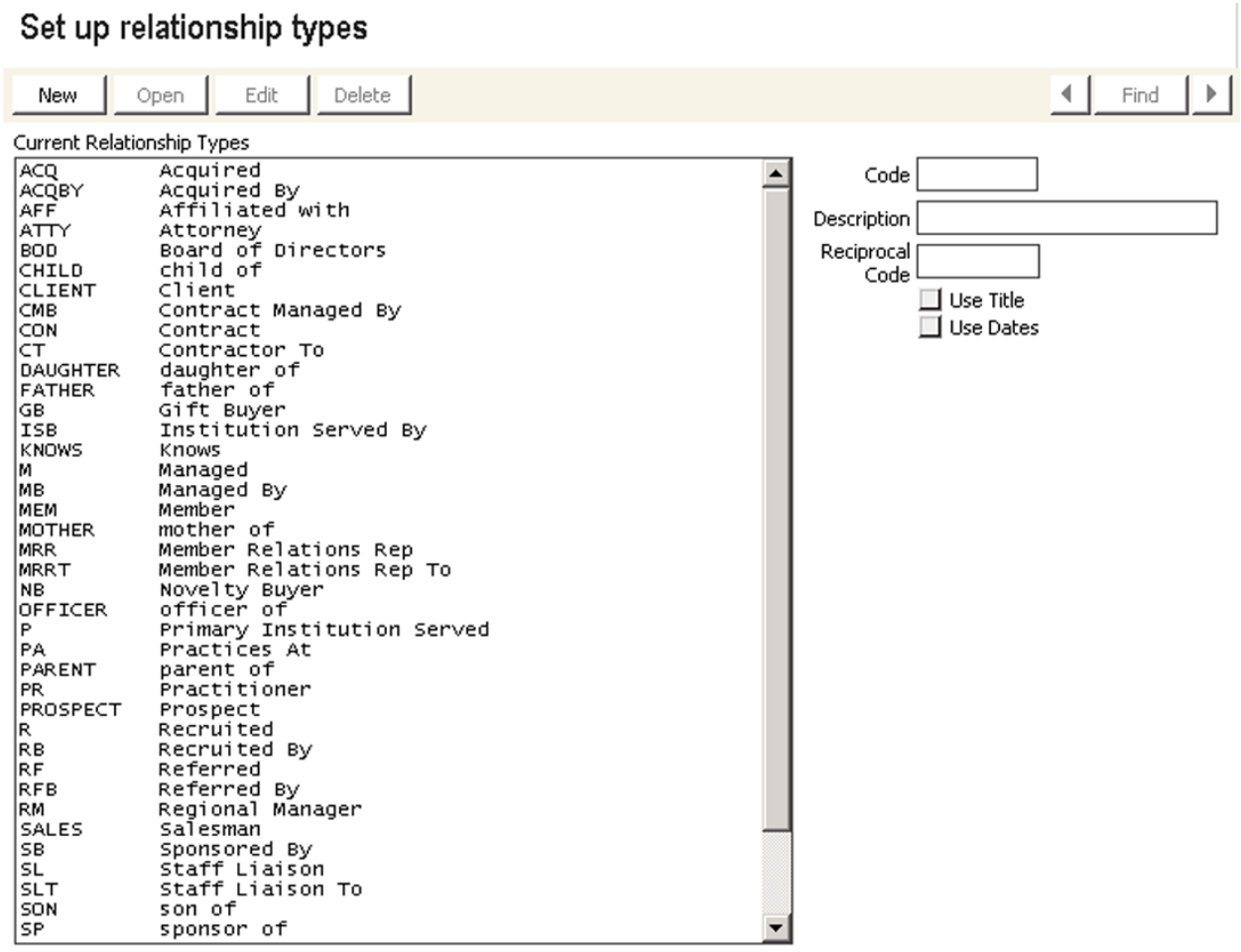
To delete a relationship type

1. In the Set up relationship types window, select a code from the list of relationship types.
2. Click Delete. A message displays asking you to confirm the deletion:

- Click Yes to remove the type.
- Click No to cancel the deletion.

Note: Before deleting a relationship type, check to be sure that your system does not have any relationships set up that use that relationship type.

Set up relationship types window



Admin Console: Configure > Membership > Set up tables > Set up relationship types

Desktop: Manage customers > Set up tables > Relationship types

Code

Specifies a code that you want to represent the relationship.

Description

Use this field to describe the relationship code. Code descriptions display next to their corresponding code on the Relationship Detail window when you select the lookup icons for the Relationship and Reciprocal fields.

Reciprocal Code

(optional) Enter the code (existing or yet to be defined) for the relationship you want to link to this code to in order to create paired relationship records (for example, you can make MOTHER the reciprocal code for the relationship type DAUGHTER).

Use Title

(optional) Enable if you want the Title and Functional Title fields to display in the Relationship Detail window.

Use Dates

(optional) Enable if you want to display fields for the beginning (From) and ending (Thru) dates of the relationship in the Relationship Detail window. Use this option for time-bound activities such as appointments.

Events

Configure event options

You must perform basic system setup activities before you can begin using the Events module. System setup information is entered on the Configure event options window.

The Configure event options window contains options grouped into three areas: Event Description Fields, Registration Fields, and the Exhibition - Years Exhibited Field. By entering user-defined information in these fields, you customize the information that appears on the Event Description window and the Register a customer window's Other tab.

Information you define in the Event Description Fields appears as labels on the Event Description window. For example, you may want to have fields that specify the location of the event, who the event contact is, or other pertinent event information. These fields will not appear on the Event Description window unless they are given labels on the Configure event options window.

Information added in the Registration Fields appears as fields on the Register a customer window's Other tab. This is helpful if you want to track information about registrants, such

as first-time attendee status, the registrant has special room needs, or other information that might be helpful for analysis and future planning.

To add user-defined Event Description Fields

1. From the Configure event options window, click Edit.
2. Enter the field names in the Event Description Fields that you want to display on the Event Description window. The user-defined fields entered on the Configure event options window display as data entry fields on the Event Description window.
3. Click Save.

To add user-defined event Registration Fields

1. From the Configure event options window, click Edit.
2. Enter the field names in the Registration Fields that you want to display on the Register a customer window's Other tab. The user-defined fields entered on the Configure event options window display as data entry fields on the Other tab.
3. Click Save.

To add field names to the Exhibition - Years Exhibited Field

1. From the Configure event options window, click Edit.
2. Enter the field name in the Exhibition - Years Exhibited Field that will store the calculated number of years exhibited.
3. Click Save.

Configure event options window

Event Description Fields

These user-defined description fields display on the Event Description window.

Registration Fields

These user-defined registration fields display on the Register a customer window's Other tab.

Exhibition - Years Exhibited Field

This custom field stores the number of years exhibited. You must be licensed for Exhibition in order to use this field.

Preferences

Opens the Event System Preferences window where you can enable several options.

To delete an event definition on close

1. From Event System Preferences window, click Edit.

2. Enable the Delete Event Definition on Close option.
3. Click Save.

To copy customer type codes to registrant class codes

1. From Event System Preferences window, click Edit.
2. Enable the Copy Membership Type to Registrant Class option.
3. Click Save.

Note: You must have the same information on both the Set up registration classes and Set up customer types windows for the customer types to display in the Event Function Definition - Fees window.

To enable Duplicate Registration/Registrant checking

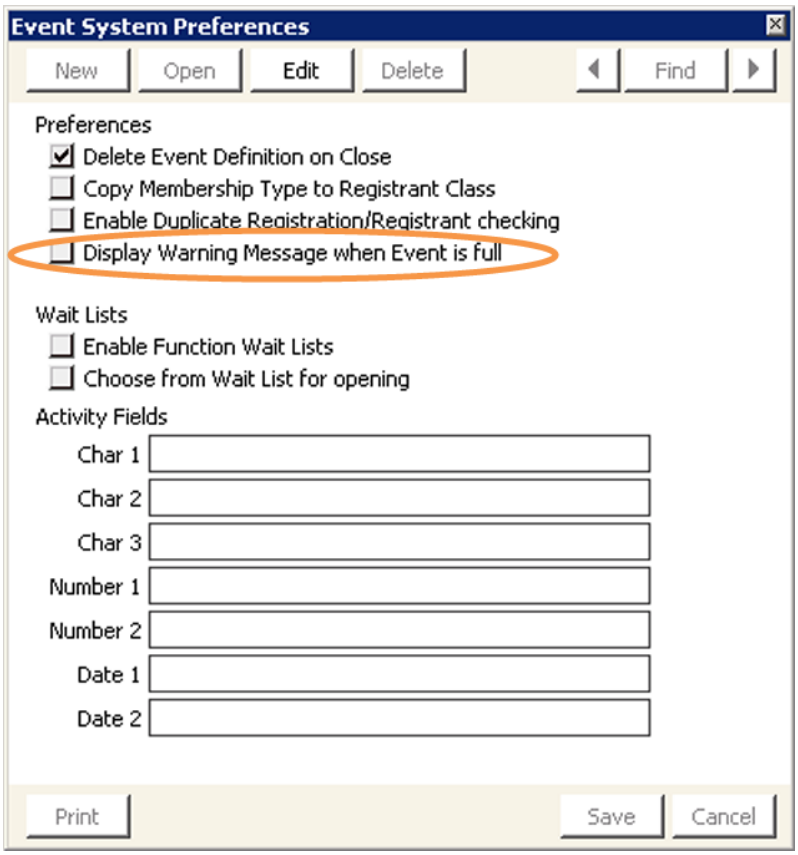
The Enable Duplicate Registration/Registrant checking option on the Event System Preferences window turns on duplicate checking for registrants. It might be useful if you routinely register customers who do not have records in the customer database. When this option is enabled and a suspected duplicate registrant is entered, a message appears on the Register a customer window stating that the customer is already registered for the event.

1. From Event System Preferences window, click Edit.
2. Enable the Enable Duplicate Registration/Registrant checking option.
3. Click Save.

To display a warning message when an event is full

1. From Event System Preferences window, click Edit.
2. Enable the Display Warning Message when Event is full option.
3. Click Save.

Event System Preferences window



Preferences

Delete Event Definition on Close – Enabling this option has significant implications. If enabled, all event definition records and function definition records are deleted when you close the event.

If you do not enable this option, you can retain the event definition and summary records, which may be important to you when cloning events. The event remains listed on the Define an event window with a status of C for closed.

Copy Membership Type to Registrant Class – iMIS can copy the customer type code directly to the registrant class code if you need to assign fees or group registrants at the customer type level. All non-represented types map to the basic Member (M) or Non Member (NM) classes. You can directly override any system-assigned class on the Event Registration window. If you want to use customer types to define your registrant classes, you can copy the existing customer types from the Set up customer types window to the Set up registration classes window. For example, if you have a student type (customer type =

STU) that you need to assign different product fees to, enter the same customer type code on the Set up registration classes window. You can select the customer types that you want to use only by entering matching codes for those types.

Enable Duplicate Registration/Registrant checking – This option compares registrants without customer IDs to the customer database. When this option is enabled and iMIS finds a customer with the same first and last name as the registrant, a warning message displays informing you that the person may already exist in the database.

Display Warning Message when Event is full – This option enables a warning message when the maximum event registration limit has been reached. This option is not related to the Wait Lists options.

Create Separate Invoices for Events Adjustments – (option only available for organizations whose Taxation Method is set to VAT) To comply with regulations related to VAT invoicing, enable this option so that new invoices are generated for financial adjustments made to event registrations. Once the original invoice is printed, then the line items, quantities, and amounts in that document will not change. With this option, every adjustment generates a new invoice document (credit note or positive adjustment), which uses the date of the adjustment, lists any credits or debits, and references the original invoice. These invoices can be viewed and printed from Events > Register a customer > Account Info tab.

Note: Enabling this option affects new event registrations only; existing registrations retain their consolidated, single invoice.

Wait Lists

Enable Function Wait Lists – This option enables the wait list for all event functions that have an entry in the Maximum field.

Choose from Wait List for opening – When this option is enabled, you can select from the wait list which registrant you want to register for a function when it becomes available.

Activity Fields

These seven mapped fields can be defined to capture and store order information in the registrant's activity records.

Advanced

Opens the Events Advanced Features window.

To create a stored procedure

1. Go to Utilities > SQL Query to open the SQLQuery window.
2. Click New.
3. Enter the SQL command in the SQL Command Text field. For example, the following SQL command will create a stored procedure to generate unique, consistent event codes that include the year and event number count:

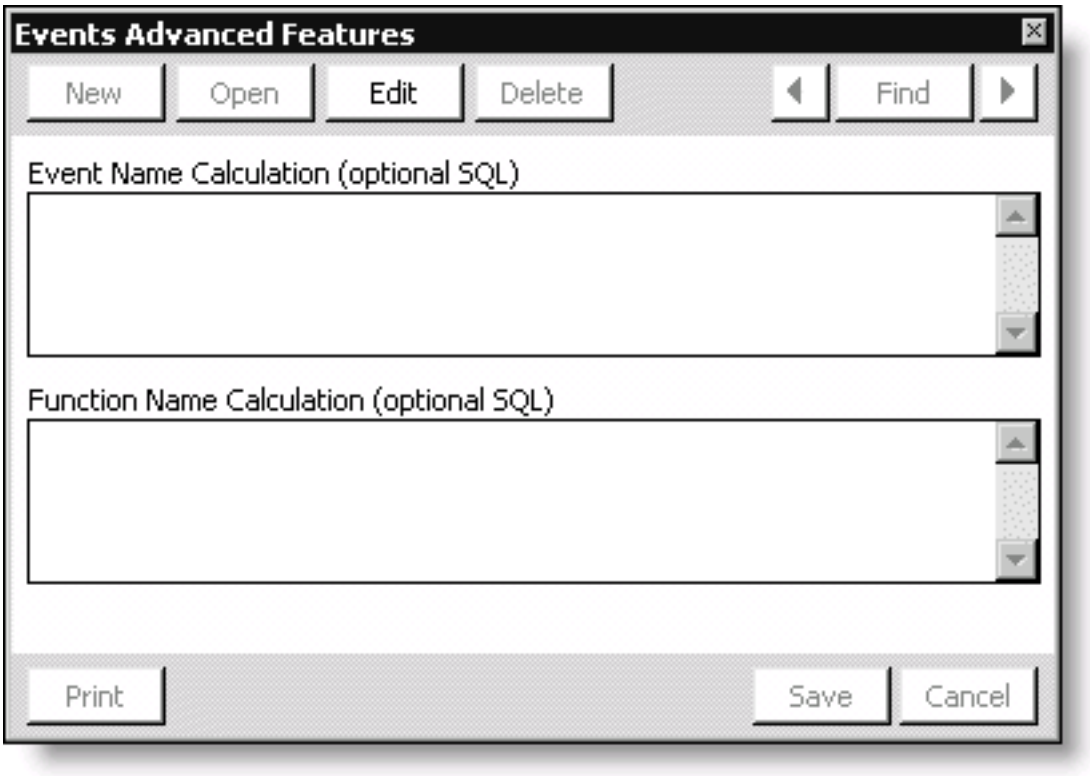
```
CREATE PROCEDURE Meeting_Calc @MeetingCounterName varchar (30) AS

Declare @MeetingCounter int, @Count int
select @Count=Count(*) from Counter
where COUNTER_NAME=@MeetingCounterName
if @Count=0
begin
insert into Counter (COUNTER_NAME,LAST_VALUE)
values (@MeetingCounterName,1)
select @MeetingCounter=1
end
else
begin
update Counter set LAST_VALUE=LAST_VALUE+1
where COUNTER_NAME=@MeetingCounterName
select @MeetingCounter=LAST_VALUE from Counter
where COUNTER_NAME=@MeetingCounterName
end
select convert(varchar,datepart(yy,getdate()))+convert(varchar,@MeetingCounter)
```

4. Click Execute.

To set up event and function name calculations

1. From Events Advanced Features window, click Edit.
2. Enter the SQL string that executes the stored procedure in the Event Name Calculation field or the Function Name Calculation field. For example, enter Meeting_Calc 'MeetingCounterName' in the Event Name Calculation field.
3. Click Save.

Events Advanced Features window



Event Name Calculation (optional SQL)

Specifies the name of the SQL string used to store the procedure that automatically assigns event codes.

Function Name Calculation (optional SQL)

Specifies the name of the SQL string used to store the procedure that automatically assigns function codes.

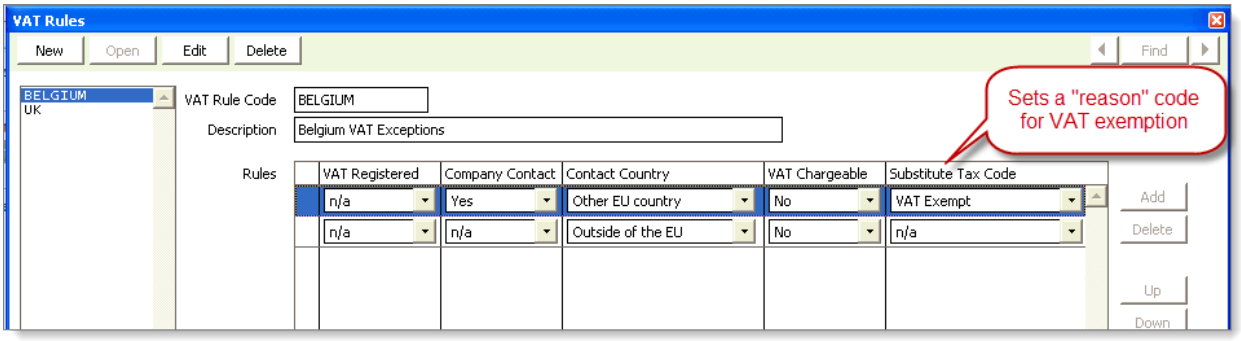
VAT Rules

(if licensed and enabled at the organization level) Opens the VAT Rules window, for optionally defining rule sets for “place of supply” requirements.

To define a set of VAT Rules

1. In the VAT Rules window, select New.
2. Create a VAT Rule Code.
3. Add a Description (optional) to explain the rule set and to display in the drop-down list during Event definition.
4. Change the n/a (not applicable) defaults to Yes and No as needed to define the test for evaluating the taxability. The n/a values behave as “either Yes or No” in the evaluation.
5. Click Add to activate rows for any additional rules you need. Note that Delete removes only the row that is currently highlighted.
6. Use Up and Down to arrange the rules in the order you want them to evaluate, from the top.
7. Select Save, then close the window.

VAT Rules window



- VAT Registered – whether the registrant has a VAT Registration number entered.

Required: Include both Name_Fin.VAT_REG_NUMBER and Name_Fin.USE_VAT_TAXATION in the User Defined Company Flow Down list.

- Company Contact – a registrant whose own record or whose parent record has a member type that is defined as a Company Record in the Member_Types table.
- Contact Country – refers to the country specified in the registrant's address (regardless of parent record) as determined using the VAT country codes you defined.
- Same as place of supplier – the registrant is in the same VAT country as the event's entity.
- Other EU country – the registrant is in a different EU country from the event's entity.
- Outside of the EU – the registrant is outside of the EU.
- VAT Chargeable – The Yes option exists for rare cases in which you need to insert a Yes rule to ensure a correct VAT charging situation isn't overridden by a more general No rule below it.
- Substitute Tax Code – This optional field is available only when VAT Chargeable is No. It lets you select one of your zero-rated VAT tax codes as the "reason" for why the situation is not taxable. Examples: the contact is VAT Exempt, is registered in a different EU country, or is outside of the EU altogether. These codes allow you to report and document tax exemptions as required.

Set up registrant classes

The Set up registrant classes window lets you manage the categories for customers that you plan to register for an event.

You should create categories for all groups for which you need to do the following:

- Charge different fees
- Track
- Print badges
- Report on separately

A set of registrant classes can include member, non-member, exhibitor, speaker, staff, student, and volunteer. When you set up your categories, include all of the classes that you will need for tracking and differentiating the registrants attending the largest events that you will process through iMIS.

At its basic level, iMIS Events will categorize each event registrant into either the member (M) or non-member (NM) class because most organizations commonly assign registration fees at those levels. This determination is made based upon the registrant's customer type and whether or not the registrant's record is on file in the database.

Note: A non-member class will be assigned if the customer's status is set to suspended, inactive, or deleted (begins with S, I, or D).

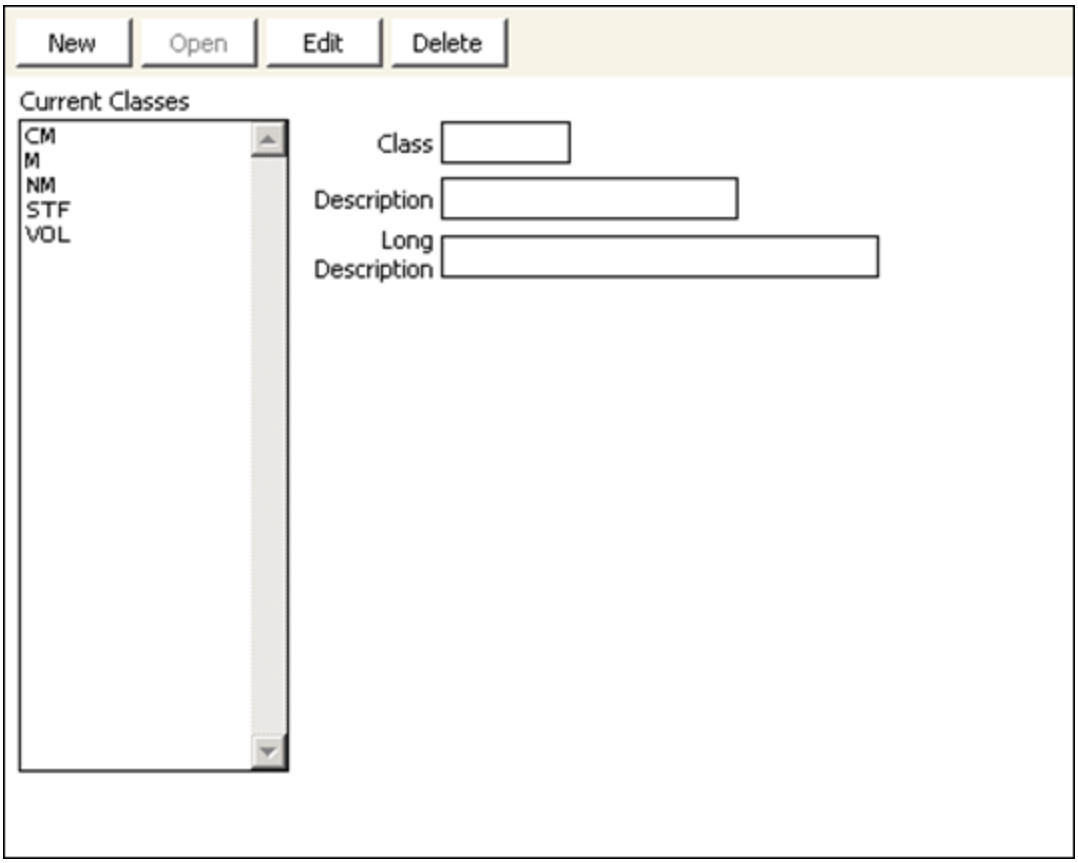
These are three possible scenarios for defining event classes:

- Let the registrant class default to the M = Member or NM = Non-member type in the Member Type table. Using this scenario, all registrants are either members or non-members based upon their customer record.
- Map customer types to registrant classes. Using this scenario, you may or may not want to map all customer types. For example, you may want to map only M = Member, NM = Non-member, and CM = Company Member.
- Define your own registrant classes without using customer types. Using this scenario, you must override the M = Member and/or NM = Non-member status during the event registration process by entering the appropriate registrant class.

To define event registration classes

1. From Set up registrant classes window, click New.
2. Enter the Class, Description, and Long Description.
3. Click Save.

Set up registrant classes window



Admin Console: Configure > Events > Set up tables > Set up registrant classes
Desktop: Events > Set up tables > Registration classes

Current Classes

Lists all of the defined registrant classes.

Class

Specifies an abbreviation or alphanumeric code that represents a specific class or category of registrants.

Description

Specifies a description of the registrant class. The description entered displays in the Event Function Definition - Fees window.

Long Description

(optional) Specifies a detailed description of the registrant class.

Set up event resources

The Set up event resources window enables you to define all of the potential room/-function resource groups and items.

Standard resources define the elements you need in preparing the physical setting for an event function:

- Facilities
- Tools
- Refreshments
- Furniture
- Supplies

On the Set up event resources window, you can outline major planning resource groups and detail items (indented from the group heading). After you establish the groups and detail items, including assigning codes, descriptions, and the order in which they appear on the planning report, those resource groups and items are available when you activate any room setup/planning sheet.

Keep in mind that you can define any number of resource groups and detail items so you can cover the anticipated needs of any particular event or function. Extra resources will not clutter your planning reports; while you may have defined many resource areas on the window, only the ones that you need and activate for a particular event function appear on its planning report.

The Set up event resources window has three purposes and enables you to do the fol-lowing:

- Define a full range of event planning resources (both groups and detail items) to accom-modate and plan for any size and type of event

- Establish a print/display order for resource groups and items on the planning report (and related windows)
- Dictate the type of information that you can enter for a resource item when you define a plan, such as quantity, time, and notes

  iMIS Events includes a sample set of resource entries. You are free to use and build on this skeleton sample or discard it. You can add, delete, and edit resource table records as needed.

  When you define a resource group (such as Audio-Visual), you name, describe, and set the order in which each group should appear on reports and windows. Similarly, if a resource group has multiple detail items such as projectors and microphones, assign a ranking for these items as well.

  Depending on the resources you select for a function, iMIS may prompt you for a quantity (of the resource needed) or a time (for which the resource is needed), or require you to verify that the resource applies. A large text area may appear for you to enter notes in the resource area. When you define a resource group or item, you also can specify which kinds of information it will accept.

  Sometimes a group may not have any detail items. Conversely, planning data may use only detail-level items (such as Audio-Visual: Microphone). In this case, the group entry provides a heading for its detail items included in the plan. When a group has no detail items, you enter planning information directly at the group level (as with Floor Plan and Notes above).

  The Set up event resources window enables you to define the options that appear in the function/room setup and planning facility. If your license includes iMIS Speaker Evaluation, this window also lets you define the event/speaker evaluation areas you want to track.

  The Room Setup facility provides planning reports and inquiry tools to help you organize the setup requirements for any function. Within iMIS Events, the room setup categories and items that you can specify for any function are referred to as resources. You determine the type of resource groups and items to have available for a planning facility. Overall

resource groups include Audio-Visual (A/V) Equipment and Food and Beverage; items within the A/V group include microphones and overhead projectors.

When you plan your available resource groups and items, list all of the items that you may want to include for complex events in a planning sheet that you can give to hotel or other setup personnel.

To define event resource groups

1. From Set up event resources window, click New.
2. Enter a resource Type (press Ctrl+L to select a value).
3. Enter a Group code, for example, A/V.
4. Enter a Title for the group, for example, Audio Visual Requirements.
5. Enter the Group Sort Order, for example, 10.
6. (optional) Enable the Text option under Field 2 Usage.
7. Click Save.

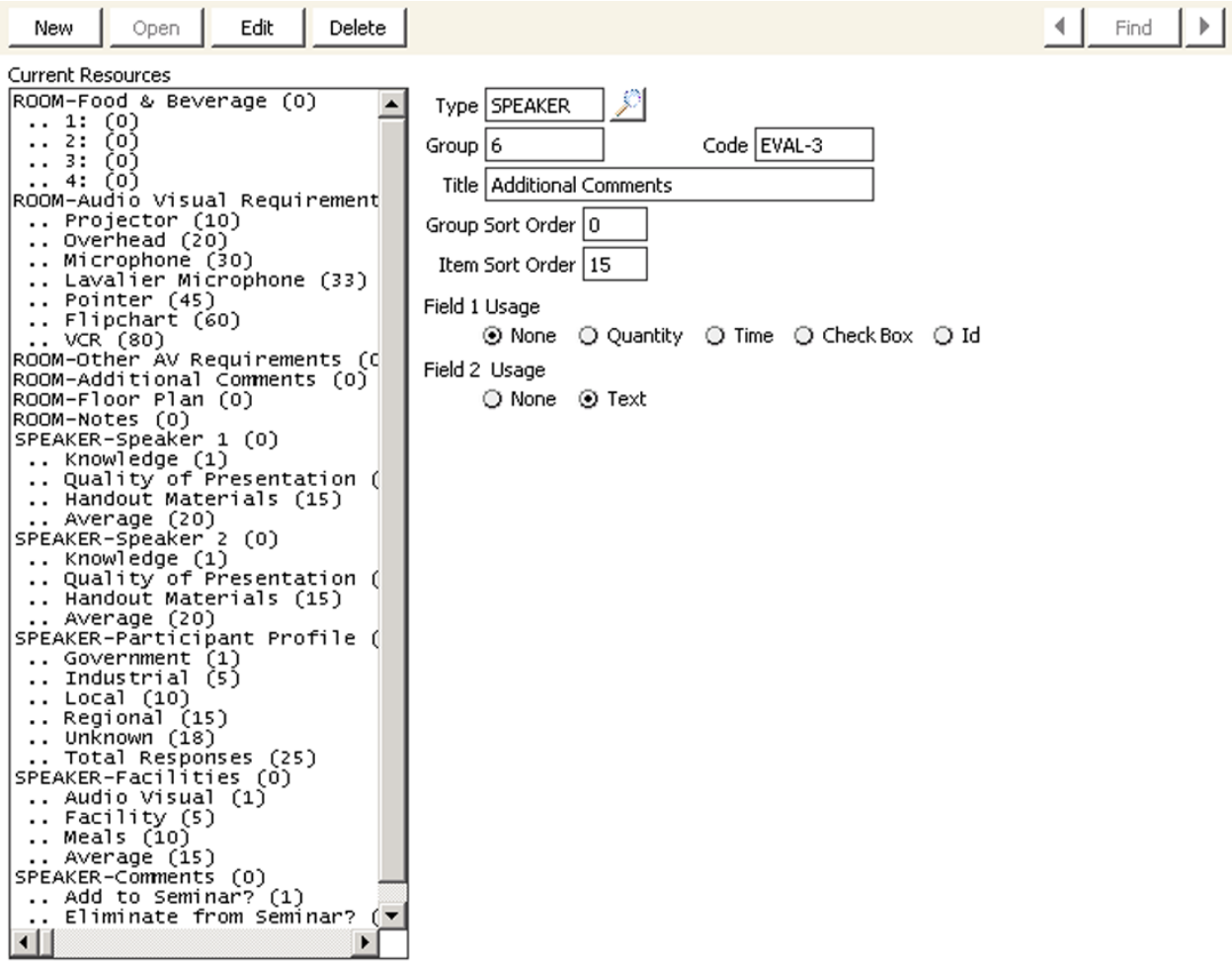
To define resources for a group

After defining an event resource group, you will need to define the resources for the group.

1. From Set up event resources window, click New.
2. Enter a resource Type (press Ctrl+L to select a value).
3. Enter the Group code established in the above procedure, for example, A/V.
4. Enter a resource Code for the group.
5. Enter a Title for the resource code.
6. Enter the Group Sort Order defined in the above procedure.
7. Enter an Item Sort Order.
8. (optional) Enable a Field 1 Usage option.

9. (optional) Enable the Text option under Field 2 Usage.
10. Click Save.

Set up event resources window



Admin Console: Configure > Events > Set up tables > Set up event resources

Desktop: Events > Set up tables > Event resources

Current Resources

Lists the defined current resources and their detail items. Resource groups, such as ROOM-Audio Visual Requirements and Room-Other AV Requirements, sort according to the order you define. Detailed group items, such as Projector, Overhead, and Microphone, are indented and sorted under their respective groups.

Type

Specifies the event resource type. The type defaults to ROOM for the Room Setup event resource. Standard Ctrl+L lookup is available, and the codes listed in the lookup window are hard coded in iMIS.

Group

Specifies a subgroup if you want the event resource divided into groups. For example, F&B and A/V are subgroups of ROOM.

Code

Specifies a unique code for a specific resource or item in a group. For example, PROJ and OVER are items in the A/V group.

Title

Specifies a description of the resource group or code, depending on which you are currently defining. For example, the title for A/V is Audio Visual Requirements; the title for PROJ is Projector. This title appears on planning reports.

Group Sort Order

Specifies the sort order of the resources on lists and reports. Enter a number indicating the sequence of this group in relation to other groups.

Item Sort Order

Specifies the sort order of the resources on lists and reports. Enter a number indicating the sequence of this item in relation to other items in the same group.

Field 1 Usage

Select one of these options for each type/group/code combination. Data is entered on the Event Function Definition - Plan window during the setup of the event:

- None (default) – When defining a group, enable this default option when the following options are not required.

- Quantity – Enable when you need to enter a quantity for a specific item, such as 2 microphones.
- Time – Enable to enter a specific time the item is required. For example, coffee will be needed at 7:00 am.
- Check Box – Enable if a specific item is required (the resource does not require quantity or time indications).
- Id – Enable when the Type is SPEAKER to link the speaker's customer record to ratings data. The ratings data will be transferred to an activity record at the close of the event.

  Field 2 Usage

  Select one of these options for each type/group/code combination. Data is entered on the Event Planning Definition - Plan window during the setup of the event:

- None (default) – Enable when text is not required.
- Text – Enable to enter text notes or comments for groups or specific items.

Fundraising

Configure fundraising options

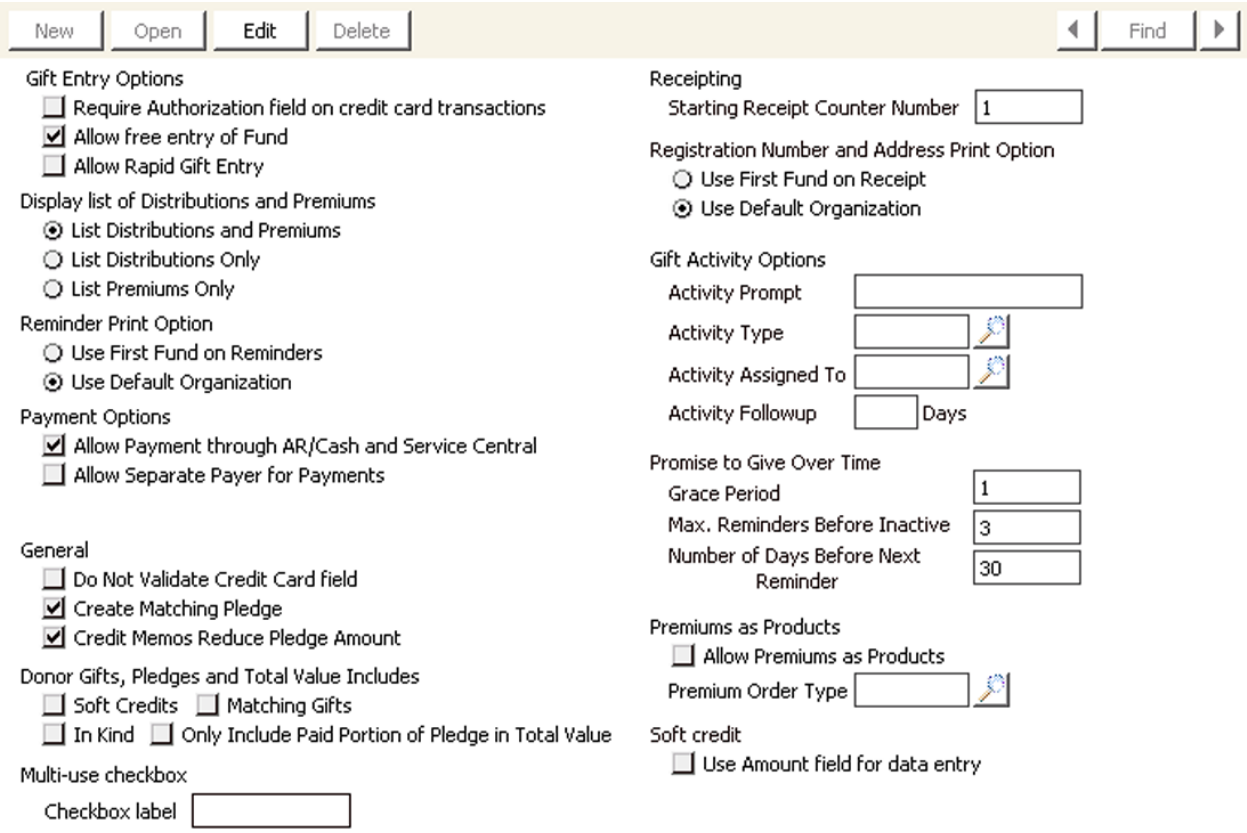
To define default Fundraising options

1. From Configure fundraising options window, click Edit.
2. Select one or more of the Gift Entry Options checkboxes.
3. Select one of the Display list of Distributions and Premiums options.
4. Select one Reminder Print Option.
5. (optional) Select one or more of the Payment Options checkboxes.

   Note: If you checked the Allow Separate Payer for Payments box, fill in the Payer Label field.

6. (optional) Select one or more of the General checkboxes.
7. (optional) Select one or more of the Donor Gifts, Pledges and Total Value Includes check-boxes.
8. (optional) Enter the Starting Receipt Counter Number.
9. Select one of the Registration Number and Address Print Options.
10. (optional) Enter Gift Activity Options.
11. (optional) Enter Promise to Give Over Time options.
12. (optional) Configure Premiums as Products options.
13. Click Save.

Configure fundraising options window



Admin Console: Configure > Fundraising > Configure fundraising options

Desktop: Fundraising > Set up module

Gift Entry Options

You may check any of the following boxes:

- Require Authorization field on credit card transactions – Enable to make the Authorization field a required field on every credit card transaction entered in the Enter and edit gifts window or the Process payments window.
- Allow free entry of Fund – Enable to freely match distributions and funds at gift entry. This allows you to determine on a case-by-case basis how the gift should be distributed. If you do not enable this option, you must define all valid combinations of funds and distributions. Users can still overwrite the Campaign and Appeal fields even if the Allow free entry of Fund option is not enabled.
- Allow Rapid Gift Entry – Enable to give users the ability to enter Date Received, Gift Type, Gift Amount, Distribution, Appeal, Campaign, and Fund once on the Enter and edit gifts window and have these fields automatically entered in additional records. When this option is checked, the buttons Enable Rapid Gift Entry and Disable Rapid Gift Entry are available to users.

  Note: The Single Gift and Single Pledge gift types are the only gift types supported for rapid gift entry. If the gift type is Installment, an error message displays when you click Enable Rapid Gift Entry.

- Date Received
- Gift Type
- Gift Amount
- Distribution
- Appeal
- Campaign
- Fund
- Installment gifts
- Acknowledgements
- Split gifts
- Memorials/TributesNotes
- Matching plans
- Inserting or editing soft credits (you can enter an existing soft credit ID, but you cannot create a new soft credit ID or edit an existing soft credit ID)

Display list of Distributions and Premiums

You must choose one of the following options:

- List Distributions and Premiums – Enable to display distributions and premiums in the Enter and edit gifts window (from Fundraising, select Enter and edit gifts).
- List Distributions Only – Enable to display only distributions in the Enter and edit gifts window.
- List Premiums Only – Enable to display only premiums in the Enter and edit gifts window.

Reminder Print Option

You must choose one of the following options:

- Use First Fund on Reminders – Enable to print the name of the first defined fund in the title of all reminders and reports. If there is only one fund, the name of this fund prints on reminders and reports.
- Use Default Organization – Enable to print the name of the default organization in the title of all reminders and reports.

Payment Options

You may check any of the following boxes:

- Allow Payment through AR/Cash and Service Central
- Enabled

  Allows fundraising payments through both the Service Central Enter and edit payments window and the AR/Cash Enter and edit cash receipts window. This is helpful if you receive payments for multiple products and some of those products are not related to fundraising.
- Disabled

  Prevents viewing Fundraising invoices on:
- Service Central Process customer requests window
- Service Central Enter and edit payments window
- AR/Cash Enter and edit cash receipts window (go to Accounting > Transactions > Enter and edit cash receipts)

  Note: If disabled, staff can only make fundraising payments through the Fundraising Process payments window.
- Allow Separate Payer for Payments – Enable to allow a separate payer for payments made in the Process payments window. If this option is enabled, you can specify a different payer ID for a pledge made by another individual.
- Payer Label – Enter the label that will be displayed for the separate payer field on the Process payments window. If you leave this field blank, the default label is Payer. Displays only if the Allow Separate Payer for Payments option is enabled.

  General

  You may check any of the following boxes:
- Do Not Validate Credit Card field – Enable to disable the credit card format validation feature when entering gifts in the Enter and edit gifts window and when making payments in the Process payments window or the AR/Cash Enter and edit cash receipts window.

Note: When setting up the Fundraising module for Credit Card Authorization, we recommend disabling the Do Not Validate Credit Card field option on the Fundraising Set up module window. If the Do Not Validate Credit Card field option is enabled, the credit card number will not be formatted automatically when it is entered on the Fundraising Enter and edit gifts window. If the Deferred Authorization option is enabled on the AR/Credit Card Authorization window, transactions made on the Enter and edit gifts window with unformatted credit card numbers will not display in credit card searches and will not print on the Deferred Credit Card Pre-Authorization report.

- Create Matching Pledge – Enable to record matching gifts as pledges rather than requests.
- Credit Memos Reduce Pledge Amount – Enable if you want credit memos to reduce a pledge amount. For example, if you pledge $100 and you write off $25 of the pledge, iMIS will recalculate the pledge as $75 and display $75 in the Fundraising History window if the Credit Memos Reduce Pledge Amount option is enabled. However, if this option is disabled and you pledge $100 and write off $25 of the pledge, iMIS will display the pledge amount as $100 with a $25 credit in the Fundraising History window.

Donor Gifts, Pledges and Total Value Includes

You may check any of the following boxes:

- Soft Credits – Include donation amounts not made by the contact, but made because of the contact.
- Matching Gifts – Include matching gift amounts provided by someone other than the donor.
- In Kind – Include the value of non-cash contributions
- Only Include Paid Portion of Pledge in Total Value – Include the amount actually received from pledges, not the total amount promised.

Multi-use checkbox

You can create a User Defined field to flag a gift record. Use the multi-use Checkbox label field to label the generic checkbox on the Enter and edit gifts window (go to Home > Fundraising > Enter and edit gifts). This field will appear on the Enter and edit gifts window only if you have entered a label for the Checkbox label field.

Receipting

Starting Receipt Counter Number – (optional) Enter the next receipt number to be automatically generated. The default for the initial counter number is 1. After you generate receipts, the counter increases the number incrementally by 1 for each printed receipt. You can manually change the counter value to a higher number, but not to a lower number. Automatically generated receipt numbers are not duplicated.

Registration Number and Address Print Option

You must choose one of the following options:

- Use First Fund on Receipt – Enable to print the name of the first fund the donor contributed to when donating to multiple funds on the receipt header.
- Use Default Organization – Enable to print the name and address of the default fundraising organization on all receipt headers. When this option is enabled, receipts aggregate by donor ID, even if the payments are to funds with different registration numbers.

Gift Activity Options

The fields in this area are used to specify a user-specified activity that can be created when a gift or pledge is entered or edited.

- Activity Prompt – Enter the prompt for the activity checkbox on the Enter and edit gifts window.
- Activity Type – Enter the activity type for the activity that is created when the activity checkbox is enabled on the Overview tab on the Enter and edit gifts window, or select the lookup icon and select the activity type from the drop-down list.
- Activity Assigned To – Enter the iMIS user who will be assigned the activity, or select the lookup icon and select the iMIS user from the drop-down list.

- Activity Followup – Enter the time (in days) between the gift or pledge entry and the follow-up action.

  Promise to Give Over Time

- Grace Period – Enter the number of days beyond the end date that requests with a status other than Active continue to display in the Manage requests window. The default grace period is 1 day.
- Max. Reminders Before Inactive – Enter the number of reminders before the request status is changed to Inactive. The default value is 3.
- Number of Days Before Next Reminder – Enter the minimum number of days between the printing of reminder notices for a request. The default value is 30 days.

  Premiums as Products

- Allow Premiums as Products – When checked, products can be used as premiums. You can set up stock, non-stock, and kit products so that they can be used as premiums for gifts and pledges with the added benefit of inventory control.

  Note: You must have the Full Order Entry module, and all products that are to be used as premiums must be set up for use as premiums on the Orders Manage products window.

- Premium Order Type – Designates the order type for products used as premiums.

  Soft credit

  Select the Use Amount field for data entry option if you want iMIS to automatically calculate the amount as a percentage of the entire donation.

Set up sender codes

Sender codes enable you to assign a signature line to requests, acknowledgements, and other correspondence that iMIS generates.

For example, different letters can be signed by the head of your organization, a committee chairperson, or a customer support representative.

You must define one sender code for each different signature line that you wish to include in correspondence. When a new gift is entered, the sender code can be assigned by clicking Acknowledge on the Enter and edit gifts window.

To create sender codes

1. From the Set up sender codes window, click New.
2. Enter the Sender Code.
3. Enter the Sender Description, which specifies the exact name and title to be used for the sender code. You can include a carriage return in the Sender Description.
4. Click Save.

Set up interest codes

Interest codes indicate specific areas that an organization or fund supports (for example, education, health, or literacy). These codes can be assigned to your organization, to funds, and to company matching plans. Specifying interest codes is optional, but if an interest code is specified in a company matching plan, matching donations can only be made to funds that have that same code.

For example, if the ED interest code is specified for the matching plan, but the GEN fund only has the CHILD code, you cannot enter a matching donation to the GEN fund.

To enter interest codes

1. From the Set up interest codes window, click New.
2. Enter the Interest Code.
3. Enter a brief Interest Description for the interest code.
4. Click Save.

Set up memorial/tribute codes

Provides memorial/tribute codes to identify the type of memorial gift or pledge (for example, In Memory of, In Tribute to, and In Honor of).

Memorial/tribute codes help you track memorial and tribute donations and help to generate correspondence related to these donations. Memorial/tribute codes designate how a donation is dedicated. For example, the code MEMOR could stand for In memory of, the code HONOR could stand for In honor of. When a memorial/tribute donation is made, the iMIS user who records the donation chooses from pre-defined memorial/tribute codes.

To enter memorial/tribute codes

1. From the Set up memorial/tribute codes window, click New.
2. Enter the Memorial/Tribute Code.
3. Enter the Description of the memorial or tribute. This description is printed or included on the letters sent to the Notify ID and to the donor.
4. Click Save.

Set up funds

Funds are the entities within your organization that serve as asset accounts for your fundraising activities. Frequently, for legal and accounting reasons, an organization must maintain separate accounting records for each fund.

In iMIS, a fund is an organization. Gifts and pledges are directed to a fund (for example, a capital fund, a fixed asset fund, or a general unrestricted fund).

Information that is entered in the Set up funds window is displayed in the Organization Names window. Entities that have the Is Fund option enabled in the Organization Names window are also displayed in the Set up funds window.

Note: If you add a fund, restart iMIS to enable access to the new fund information.

Caution! Do not delete funds after you have completed fundraising transactions. Deleting funds affects the completed transactions. If you delete a fund, you must manually delete the fund from the appeals, campaigns, distributions, and donor levels associated with the fund.

To define a fund

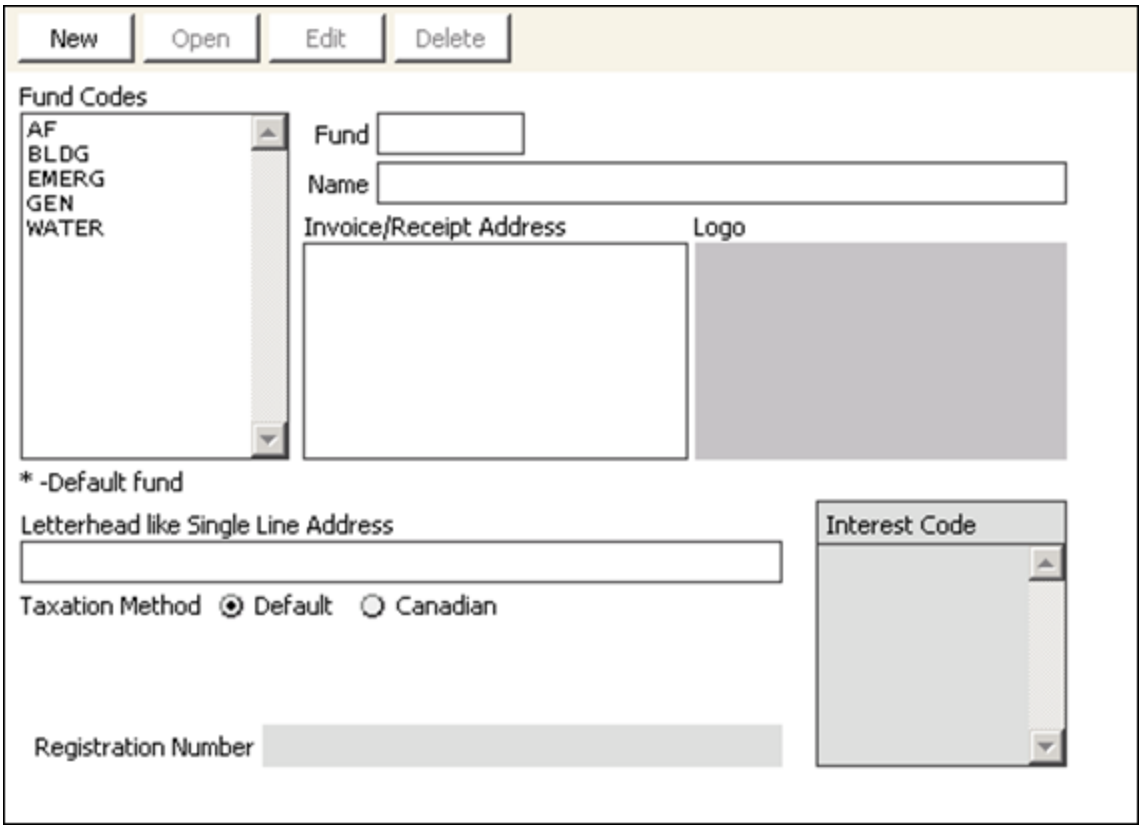
1. From Set up funds window, click New.
2. Enter the Fund code.
3. Enter the Name of the fund.
4. (optional) Enter the fund's Invoice/Receipt Address.
5. (optional) Paste the fund's Logo if available.
6. (optional) Enter the Letterhead like Single Line Address if applicable.
7. Select the appropriate Taxation Method option.
8. (Canadian taxation only) Enter the Tax Authority.
9. (Canadian taxation only) Enter the GST/HST Remittance #.
10. (optional) Add any interest codes to be associated with the selected fund in the Interest Code field, or press Ctrl+L to select interest codes.
11. Click Save.
12. Restart iMIS.

Note: If you defined a fund as the default organization in the Organization Names window, the fund will have an asterisk next to it in the Org Codes scrolling list indicating that it is the default fund (and the default organization).

To designate your organization as a fund

1. Go to File > System Setup to open the System Setup window.
2. Click Organization Names to open the Organization Names window.
3. Select an item from the Org Codes list.
4. Click Edit.
5. Check the Is Fund checkbox.
6. Enter the Registration Number associated with the organization if applicable.
7. Click Save.

Set up funds window



Admin Console: Configure > Fundraising > Set up tables > Set up funds
Desktop: Fundraising > Set up tables > Funds

Fund Codes

Lists all currently defined fund codes.

Fund

Designates the currently selected or the new fund code.

Name

Designates the full name of the organization or fund.

Invoice/Receipt Address

Designates the mailing address of the fund.

Logo

Designates the fund's logo that will be used on reports that include the logo.

Letterhead like Single Line Address

Designates the fund's letterhead if it is a single line address line.

Interest Code

(optional) Enter the interest codes associated with the fund.

Taxation Method

Designates the taxation method used for this organization/fund. Choose one of the following options:

- Default – Uses the default taxation method defined in system setup.
- Canadian – Uses the Canadian taxation method. This method requires the following additional fields:
- Tax Authority – The Canadian tax authority.
- GST/HST Remittance # – The GST/HST Remittance number.

Note: Canadian taxation requires additional configuration.

Registration Number

(optional) Designates the registration number associated with the fund. The registration number is used with the Fundraising receipting function.

Set up campaigns

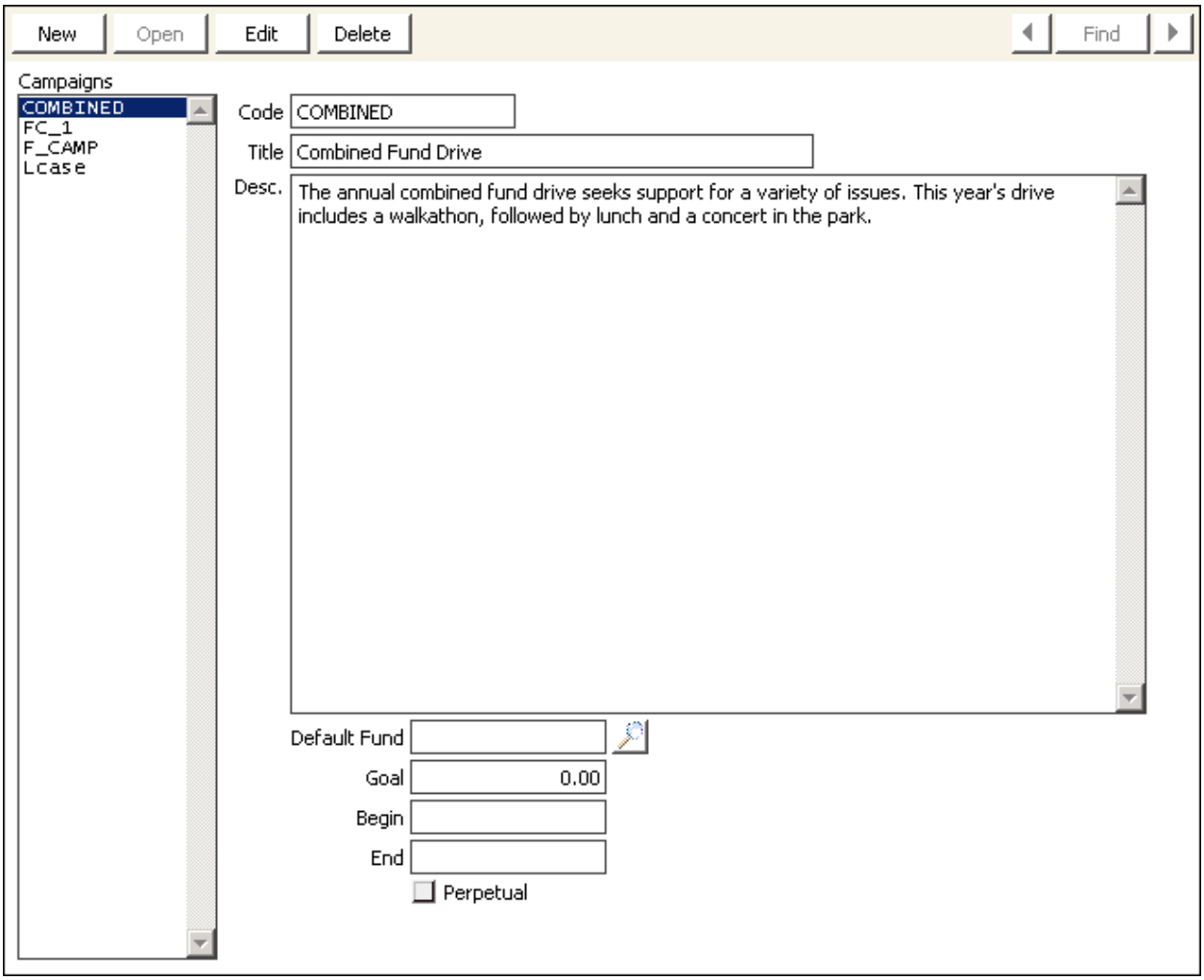
A campaign is a series of activities designed to generate money for a specific goal or objective. You may have a capital campaign with a goal of $1 million for a new building, or a scholarship campaign with a goal of $50,000 for a new scholarship. Campaigns are not required by iMIS, and not all organizations use them. However, campaigns are useful for generating and tracking money that is targeted for a specific goal.

To define a campaign

1. From Set up campaigns window, click New.

2. Enter a descriptive alphanumeric Code to identify the campaign.
3. Enter the full Title of the campaign.
4. (optional) Enter a detailed description of the campaign in the Desc. field.
5. (optional) Enter the Default Fund code for the campaign, or click the lookup icon to select a fund code.
6. (optional) Enter the financial Goal for the campaign.
7. Optional) Enter the starting date for the campaign in the Begin field.
8. (optional) Enter the predetermined End date for the campaign, or enable the Perpetual option if the campaign is ongoing.
9. Click Save.

Set up campaigns window



Admin Console: Configure > Fundraising > Set up tables > Set up campaigns
Desktop: Fundraising > Set up tables > Campaigns

Campaigns

Lists all currently defined campaigns.

Code

Designates the campaign code of the currently selected or new campaign.

Title

Designates the title of the campaign.

Desc.

Describes the campaign.

Default Fund

Designates the default fund for the campaign.

Goal

Designates the campaign's financial goal.

Begin

Designates the campaign's starting date.

End

Designates the campaign's ending date.

Perpetual

When checked, indicates the campaign does not have an end date.

Set up appeals

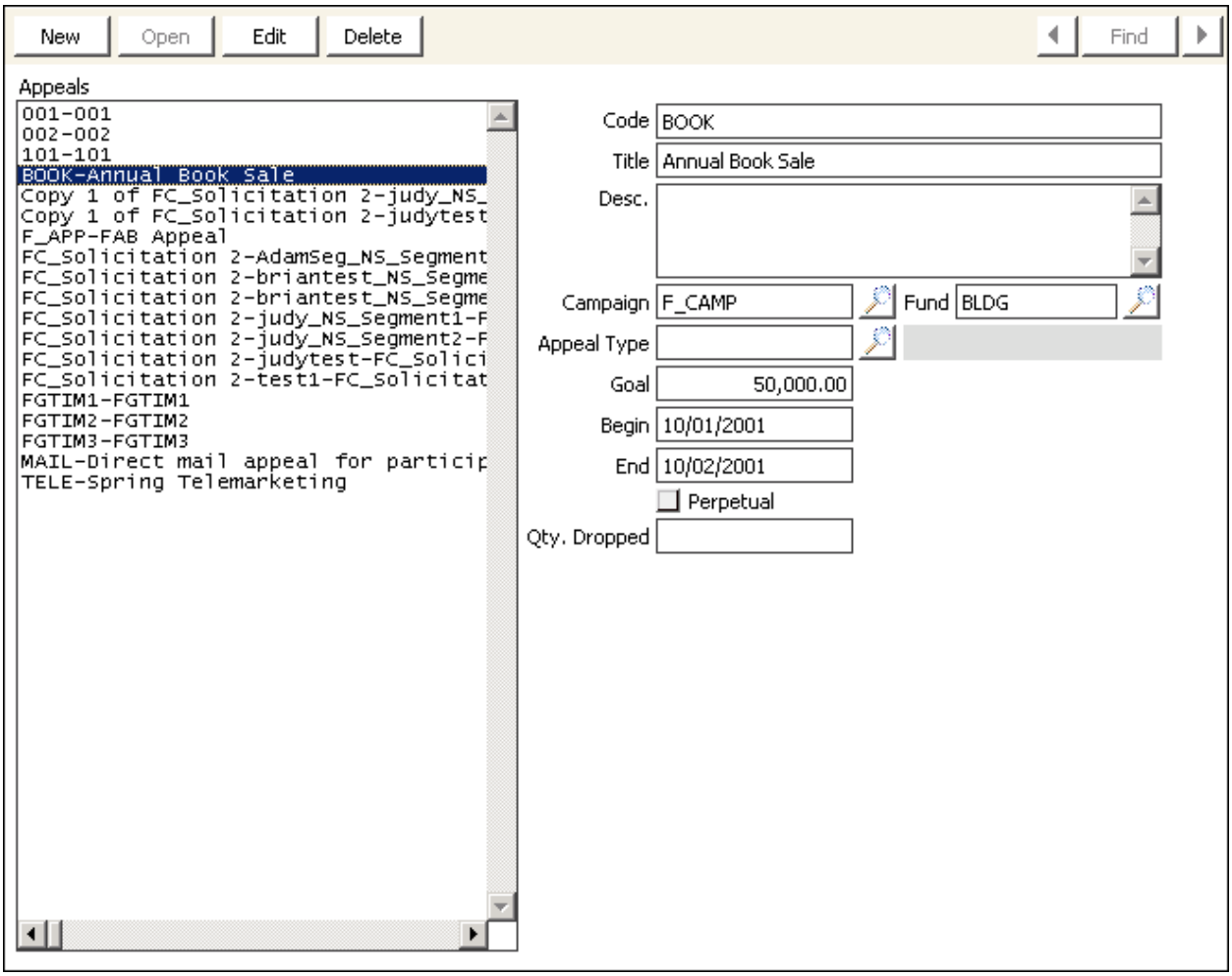
An appeal is a short-term activity, such as a mass mailing, a telephone solicitation, or a fax blitz, that may be connected to a particular campaign or fund. Appeals are not required in Fundraising. You can define any number of appeals, depending upon your organization's needs.

To define an appeal

1. From Set up appeals window, click New.
2. Enter a unique alphanumeric Code for the appeal.
3. (optional) Enter a descriptive Title for the appeal.
4. (optional) Enter a detailed Description of the appeal. This description displays only in the Set up appeals window.

5. (optional) Enter the Campaign to which this appeal belongs, or click the lookup icon and select a campaign.
6. (optional) Enter the Fund to which this appeal belongs, or click the lookup icon and select a fund.
7. (optional) Enter the Appeal Type, or click the lookup icon and select an appeal type.
8. (optional) Enter the Goal for the appeal.
9. (optional) Enter the date that the appeal starts in the Begin field.
10. (optional) Enter the date that the appeal ends in the End field, or enable the Perpetual option if the appeal is ongoing.
11. (optional) Enter the quantity dropped for the appeal in the Qty Dropped field.
12. (optional) Click Premiums to apply a premium to the appeal.
13. Click Save.

Set up appeals window



Admin Console: Configure > Fundraising > Set up tables > Set up appeals

Desktop: Fundraising > Set up tables > Appeals

Appeals

Lists all currently defined appeals.

Code

Enter an alphanumeric code for the selected appeal.

Title

(optional) Enter the full title of the appeal.

Desc.

(optional) Enter a detailed description of the appeal.

Campaign

(optional) Enter the campaign associated with the appeal.

Fund

(optional) Enter the fund associated with the appeal.

Appeal Type

(optional) Enter the type of appeal. Appeal types are defined in the APPEAL_TYPE lookup table (from Customers, select Set up tables > General lookup/validation, and select APPEAL_TYPE).

Goal

(optional) Enter the appeal's financial goal. When you enter a monetary value, iMIS automatically formats the value with the appropriate commas. For example, if you enter 1000000 (one million) in the Goal field, iMIS automatically formats the value as “1,000,000.00” when you tab out of the field.

Begin

(optional) Enter the appeal's begin date.

End

(optional) Enter the appeal's end date.

Perpetual

(optional) Enable to specify that the appeal is ongoing.

Note: You cannot enable the Perpetual option if the appeal is associated with a campaign that has a specific end date. You may have to update the information in the Set up appeals window more frequently than in the Set up funds window (from Fundraising, select Set up tables > Funds) or the Set up campaigns window (from Fundraising, select Set up tables > Campaigns) if you conduct several appeals during the year.

Qty Dropped

Enter the quantity dropped for the appeal. This allows you to gauge the response rate to an appeal.

Premiums

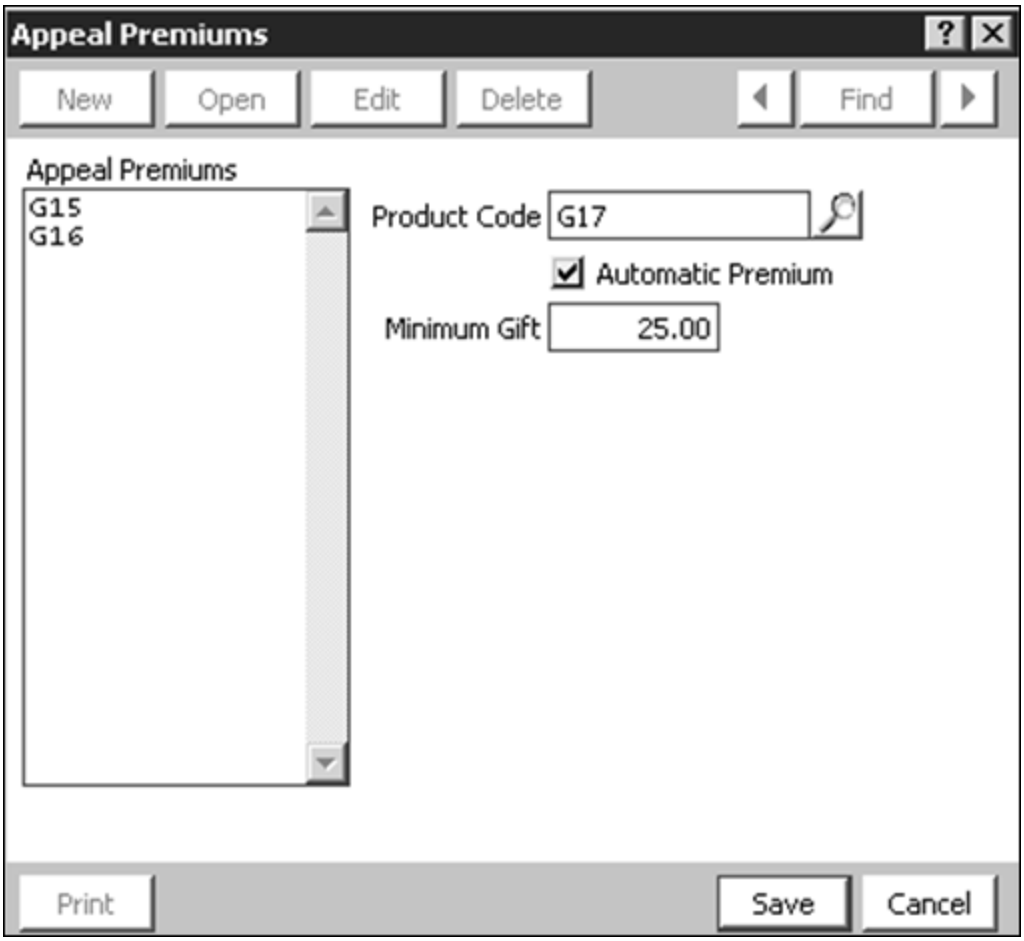
Click this button to open the Appeal Premiums window and apply a premium against the appeal.

Appeal Premiums window

You can apply a premium against an appeal code to establish rules about which premium is given for a specific gift amount. For example, a gift of $10 will provide a key chain, a gift of $ 25 will provide a mug. Appeal premiums are created and assigned to products on the Appeal Premiums window.

1. Select Set up appeals.
2. Highlight an appeal.
3. Click Premiums.

   Note: To display the Premiums button in the Appeals window, you must enable the setup option to Allow Premiums as Products (Configure > Fundraising > Configure fundraising options).



Appeal Premiums

The product selected for the premium.

Product Code

The product associated with the Appeal premium. The Premium option must be enabled on the Manage Products window for the product to appear in this list (Home > Commerce > Enter and edit products).

Automatic Premium

Controls options on the Enter and edit gifts window.

- If enabled, the premium will automatically attach.
- If disabled, the Show all premiums option is available and you can attach a general item from inventory.

  Minimum Gift

  Sets the minimum amount required to apply the premium.

Set up distributions and premiums

Before you enter gifts and pledges, you must define the distributions or premiums that are to be credited with the contributions. Distributions allow you to predefine combinations of funds, campaigns, and appeals. When a gift is received, it is usually distributed among a fund, a campaign, and an appeal. A distribution does not have to include a campaign or an appeal, but it must include a fund. If you use a general ledger system, the distribution also determines the general ledger income account to be credited.

A premium is a complimentary gift, such as a coffee mug or T-shirt that is given to a contributor who makes a donation. A premium is a distribution with a fair market value. A premium also has a gift value. For example, the fair market value for a coffee mug may be only $4, but the donor may be required to donate at least the gift value of $25 to receive the coffee mug.

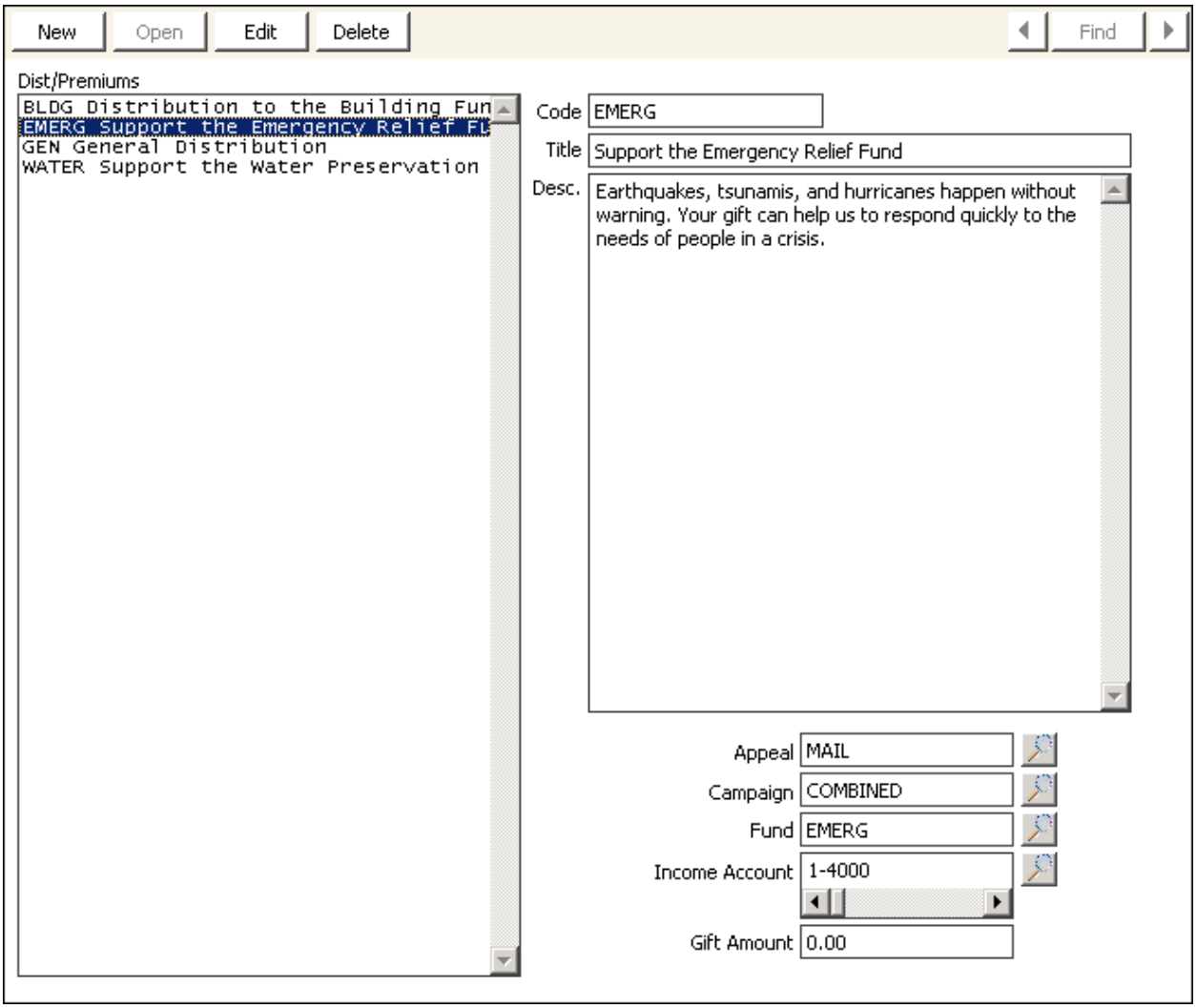
Distributions and premiums are defined in the Set up distributions and premiums window.

To define a distribution or premium

1. From Set up distributions and premiums window, click New.
2. Enter a unique alphanumeric Code (five characters maximum) for the distribution or premium.
3. (optional) Enter the Title of the distribution or premium.
4. (optional) Enter the description of the distribution in the Desc. field.
5. (optional) Enter the Appeal associated with the distribution or premium, or click the lookup icon and select an appeal.

6. (optional) Enter the Campaign associated with the distribution or premium, or click the lookup icon and select a campaign.
7. Enter the Fund to be identified with the distribution or premium, or click the lookup icon and select a fund.
8. (optional) Enter the general ledger Income Account to be credited with contributions recorded with the distribution or premium, or click the lookup icon and select an account.
9. (Premiums only) Enter the usual amount of the gift or pledge in the Gift Amount field. This is the amount the contributor must donate in order to qualify for the premium.
10. (Premium only) Enter the fair market value of the contribution in the Fair Market Value field.
11. Click Save.

Set up distributions and premiums window



Admin Console: Configure > Fundraising > Set up tables > Set up distributions and premiums

Desktop: Fundraising > Set up tables > Distributions and premiums

Dist/Premiums

Lists currently defined distributions and premiums.

Code

Designates an alphanumeric code for the selected distribution or premium.

Title

Designates a descriptive title for the distribution or premium.

Desc.

Specifies a detailed description of the distribution or premium.

Appeal

Specifies the appeal associated with the distribution or premium.

Campaign

Specifies the campaign associated with the distribution or premium.

Fund

Specifies the fund associated with the distribution or premium.

Income Account

Specifies the general ledger income account to be credited with contributions recorded with the distribution.

Gift Amount

(Used only for premiums) Specifies the usual amount of the gift or pledge associated with the premium. This is the amount of money the donor must contribute to receive the premium.

Fair Market Value

(Used only for premiums) Specifies the fair market value of the premium. For example, if the premium is a coffee mug that sells for $4, but a donor receives the mug for a $20 gift, $4 is the fair market value.

Set up donor clubs

Many fundraising organizations establish donor clubs to recognize various levels of giving by donors. For example, for contributions of $10,000 or more, the organization may designate a donor as a “friend,” and for $20,000 or more, a donor may be designated as a

"benefactor." Not all organizations use donor clubs, but if your organization does, iMIS makes it easy to record and track donations and donor clubs.

iMIS automatically determines whether a donor club is attained with each gift entry. If you define a donor club at $20 for a single gift, and a contributor donates $20 or more, the contributor automatically attains the donor club.

When generating a Donor Club Detail report, the highest donor club achieved by an individual within the same criteria as defined in the Set up donor clubs window supersedes any lower donor club (if Superseded was entered in one of the user-defined fields on the Set up activity types window (from Customers, select Set up module> Activity types) when setting up the DONORCLUB activity type).

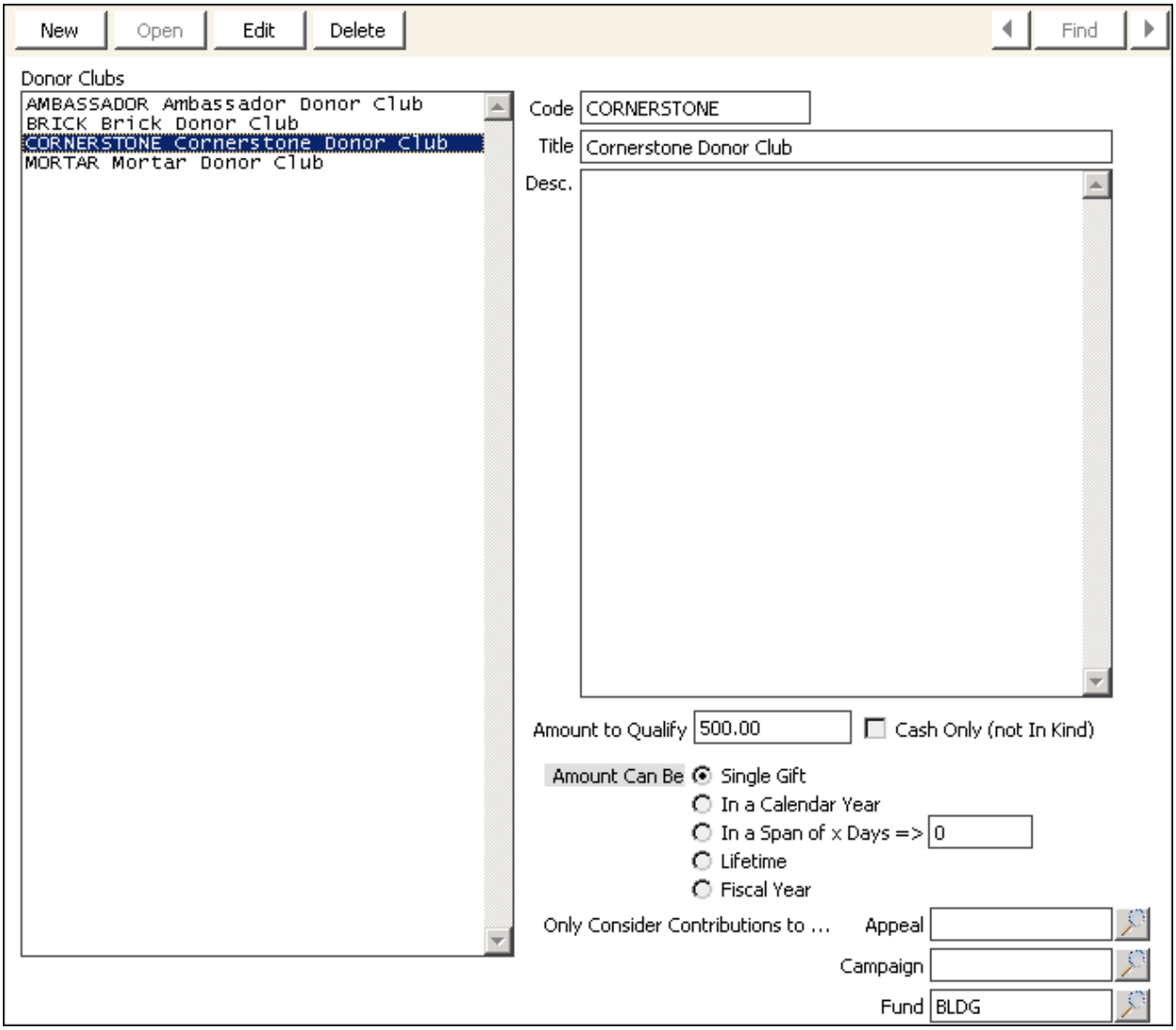
However, such a donor club does not supersede a donor club that was achieved under different parameters. For example, an individual makes a $1,000 cash contribution, which qualifies the donor for the Diamond Donor Club. The Diamond Donor Club requires a cash-only contribution of at least $1,000. The donor also qualifies for the Silver and Gold Donor Clubs, which require cash-only contributions of $100 or $500, respectively. The Diamond Donor Club supersedes the Silver and Gold, and only the Diamond Donor Club prints on the Donor Club Detail report. However, the contributor also qualifies for the Patron Donor Club, which requires a $500 gift, but does not require cash-only contributions. Both the Diamond and Patron Donor Clubs print on the Donor Club Detail report.

To define donor clubs

1. From Set up donor clubs window, click New.
2. Enter a unique alphanumeric Code (five characters maximum) for the donor club.
3. (optional) Enter the Title of the donor club. This title will print on thank you letters to donor club members.
4. (optional) Enter a short description of the donor club in the Desc. field.
5. Enter the amount needed to qualify for this particular donor club in the Amount to Qualify field.

6. (optional) Enable the Cash Only option for the donor club to be achieved only with cash gifts and not pledges or in-kind gifts.
7. Select a receipt period option for the gift or pledge in the Amount Can Be field.
8. (optional) In the Only Consider Contributions to area, enter the appropriate code or combination of codes if the donor club can only be achieved with a contribution to a specific appeal, campaign, or fund.
9. Click Save.

Set up donor clubs window



Admin Console: Configure > Fundraising > Set up tables > Set up donor clubs
Desktop: Fundraising > Set up tables > Donor clubs

Donor Clubs

Displays all currently defined donor clubs.

Code

Designates an alphanumeric code for the current donor club.

Title

Designates a title for the donor club.

Desc.

Specifies a description of the donor club.

Amount to Qualify

Specifies the monetary value of donation needed to qualify for the donor club.

Cash Only (not In Kind)

Check this box to limit qualifying gifts to cash. When this box is cleared, pledges and or in-kind gifts are also eligible.

Amount Can Be

Designates whether the total of multiple gifts is used to qualify for donor club membership, and if so, what time span is used to calculate total giving.

- Single Gift – Specifies that only single gifts can qualify donor club membership.
- In a Calendar Year – Specifies that the sum of a donor's contributions made during a calendar year is the amount used to determine donor club membership.
- In a Span of x Days=> – Specifies that the sum of a donor's contributions made during the last X days is the amount used to determine donor club membership.

- Lifetime – Specifies that the sum of all contributions a donor has ever made is the amount used to determine donor club membership.
- Fiscal Year – Specifies that the sum of a donor's contributions made during the fiscal year, as defined in the AR/Cash module, is the amount used to determine donor club membership.

  Only Consider Contributions to

  Specifies if donations must be associated with a particular fundraising effort in order to qualify for donor club membership. If all items are left blank, all otherwise qualified donations are eligible. If one or more of the following items is specified, only donations that are associated with all of the specified codes are considered when determining donor club membership.
- Appeal – Specifies an appeal code with which qualifying donations must be associated.
- Campaign – Specifies a campaign code with which qualifying donations must be associated.
- Fund – Specifies a fund code with which qualifying donations must be associated.

Billing

Configure billing options

To set up general billing options

1. From Configure billing options window, click Edit.
2. Enter the Standard Billing Interval in months.
3. Select an Accounting Method. If Accrual is selected, additional options display in the Paid Thru Date Update section and the AR Payment Application section displays. You must make selections in these areas.
4. Select a Billing Time.
5. Select an appropriate Prorating option.

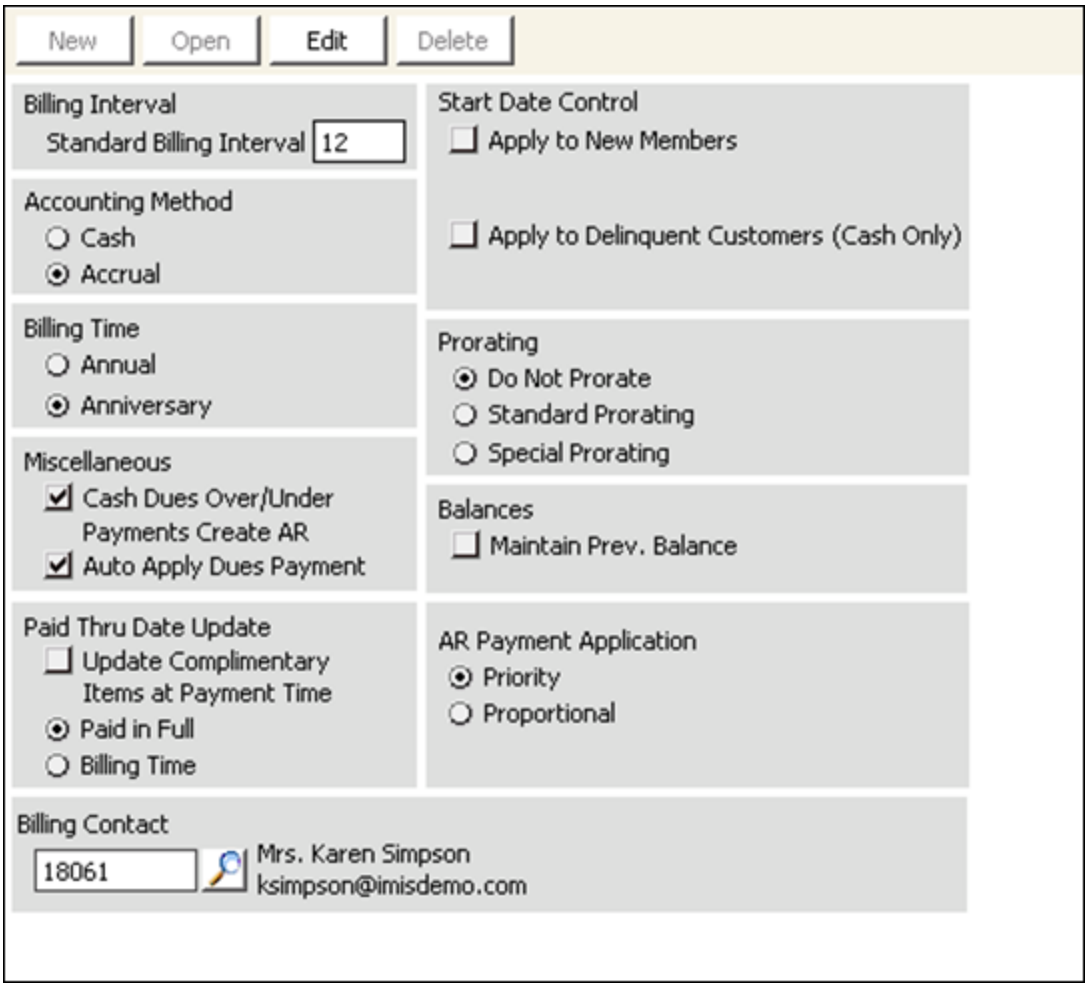
Note: Prorating applies only when you want to bill on an annual or fixed-term basis, as opposed to an anniversary or rotating term basis. If billing is done for all products (for example, all fees and product billings) on an anniversary basis, you must enable the Do Not Prorate option.

6. (optional) Enable the Update Complimentary Items at Payment Time option if you want to advance the Paid Thru date of complimentary products at payment time instead of at billing time.
7. (optional) Select the Start Date Control options to advance the Bill Begin day by one month and create a new billing term.
8. Enable or disable the Cash Dues Over/Under Payments Create AR option.
9. Enable or disable the Maintain Prev. Balance option.
10. Click Save.

    Caution! If Annual is chosen as the Billing Time, be sure to open the AR/Cash Set up module window (go to Accounting > Options > Configure accounting options) and enter the calendar month (numeric) that represents either your fixed-term or fiscal year in the First month of fiscal year (number) field.

    Caution! If Special Prorating is selected, define the product codes as discussed previously and then see Defining Prorating Rules to establish the special prorating table rules.

Configure billing options window



Admin Console: Configure > Billing > Configure billing options
Desktop: Billing > Set up module > General options

Billing Interval

Standard Billing Interval – The billing interval controls the frequency with which you will normally generate bills. You can override the billing interval at the individual customer level, at the product level, or at the individual subscription level. Choose the billing interval as a number of months from 1(monthly), 2(bimonthly), 3(quarterly), 6 (semi-annual), 12 (yearly), or 24 (every 2 years).

Note: The number entered in the Standard Billing Interval field affects billing rates. Unless the billing interval is overridden at the product level, the dollar amounts entered for the products should be in accordance with the Standard Billing Interval.

Start Date Control

Note: If there are no Start Date Control options implemented, the New Bill From field on the Dues/Subscription Payments window defaults to the first day of the current month.

Determines whether the Bill Begin date should be advanced by one month. Start Date Control can be used to advance the start date of newly billed items or to specify a grace period for delinquent customer products. If implemented, the Bill Begin date will be controlled according to the following options:

- Apply to New Members – This option enables you to automatically advance the subscription begin date for new customers according to the parameter set in the Advance Start Month as of field.
- Advance Start Month as of – (Displays once you enable the Apply to New Members or Apply to Delinquent Customers option.) This option is a user-defined parameter used with the Apply to New Members option to allow you to set a specific day of the month on which to advance the begin date for new customers. Valid entries range from 0-28. If the value is 0 or 1, the Bill Begin date will always advance to the beginning of the next month.

  For example, if the Advance Start Month as of field is set to 15 and the Apply to New Members option is enabled, all new customers joining on August 15 will have their billing Begin Date set to 09/01.
- Apply to Delinquent Customers – (Applies to Cash basis and Anniversary items only.) This option allows for the calculation of a new billing term when payment is posted to an existing billing record after the Bill Begin date. The new term begin date is determined by the value of the Advance Start Month as of field. If the value is 0 or 1, the new term will always advance to the beginning of the next month.
- Grace Period in Months – (Applies to Cash basis and Anniversary items only and displays

only when the Apply to Delinquent Customers option is enabled.) This option refers to the grace period that is allowed for payment after the Bill Begin date.

For example, the Advance Start Month as of field is set to 15, the Apply to Delinquent Member option is enabled, and the Grace Period in Months is set to 3. A customer with a Paid Thru date of 12/31/2001 is billed for a renewal term of 01/01/2002 to 12/31/2002. The customer does not pay until 04/15/2002. The payment transaction date of 04/15/2002 exceeds the Bill Begin date of 01/01/02, and it also exceeds the three-month grace period from the Bill Begin date of 01/01/2002. Therefore, a new product term will be calculated by comparing the payment transaction date to the value of the Advance Start Month as of field. In this example, the payment transaction date of 15 is equal to the value set in the Advance Start Month as of field, and the new term will be calculated as 05/01/2002 to 04/30/2003.

Accounting Method

- Cash – Enable this accounting method to set up the billing system to recognize income when payment (cash) is received regardless of when bills or invoices were generated. The cash method is preferred for the Billing module.
- Accrual – Enable this accounting method to recognize income by creating open accounts receivable items when bills and invoices are generated.

  Note: After you change the accounting method, you must restart iMIS Desktop and ensure that your iMIS Administrator stops and restarts all websites that contain your iMIS 15 applications in order to see the changes in the left navigation area.

  If restarting the websites is problematic, you can wait for the cache to refresh (default is 15 minutes wait time, designated by the refresh cache interval), and then your changes appear.

  Billing Time

  The billing time is a method selected to control the start and end time of a customer or product term.

- Annual – Fixed annual customer term. All customers have the same billing term. The customer term may coincide with the calendar year (January-December) or fiscal year (begin in any month). Annual fees are commonly prorated for new customers. Different prorating rules apply depending on when a customer joins. For example, if new customers join in July and you renew annually on the calendar year, you might want to prorate their fees by 50 percent.

  Note: If you select Annual as the billing time, you will need to set up the first month of the fixed term or fiscal year on the AR/Cash Set up module window (go to Accounting > Options > Configure accounting options). Enter the calendar month (numeric) that represents either your fixed term or fiscal year in the First Month of Fiscal Year (Number) field. The value in the First month of the fiscal year (number) field auto-populates the Effective Date. If this field does not have a value greater than zero, then the Effective Date must be manually entered on the Process billing window (go to Home > Membership and Dues > Bill membership dues).

- Anniversary – Individual renewal date that fluctuates based on each customer's Join Date. For example, if a customer joins on July 1, his or her term would be from July 1-June 30 of the following year. If you select an anniversary billing time, terms will initially default to a year (or other specified billing interval) from the Join Date, if it exists, or the Effective Date you specified during billing.

  Prorating

  Prorating applies only to organizations that bill on an annual or fixed-term basis, as opposed to an anniversary or rotating-term basis.

- Do Not Prorate – Enable to specify that fees are the same regardless of when a customer joins the organization.

- Standard Prorating – Enable to specify a global setting that prorates all products for the current year (depends on the billing interval). The following example relates to a billing interval of 12. If a customer joins during a term, iMIS reduces the initial fees based on a standard 12-month calculation. For example, if a customer joins in month 7 and the annual fees are $200, the calculated fees would be 6/12 of the total fees, or $100.

- Special Prorating – Enable to specify user-defined prorating rules according to the needs of your organization. This rule is a per product setting and must be defined and assigned to individual products. Specify prorating rules on the Prorating window (go to Configure > Billing > Set up billing products, and click Prorate Rules).

  Miscellaneous

  Cash Dues Over/Under Payments Create AR – When you enable this option, over-payments are tracked in the AR/Cash system to allow the credit to appear on the Credit Invoices window (go to Accounting > Processes > Process month-end procedures, and click Credit Invoices). Underpayments are also tracked in AR by considering the item fully paid and maintaining an outstanding balance. Overpayment or underpayment to AR creates an open credit or debit item for that customer. For example, if the customer paid $150 and had been billed $100, a payment of $150 can be entered but only $100 applied. iMIS would create an open credit of $50 for that customer in AR. A full payment of line items advances the Paid Thru date on those items. Credit (overpayments) and outstanding debit (underpayments) balances are maintained by the AR system. In Billing, the item will be treated as fully paid.

  Auto Apply Dues Payment – This option is enabled by default. When you disable this option, dues payments are not applied automatically.

  Balances

  Maintain Prev. Balance – If this option is enabled, iMIS maintains the previous balances on customers who have made a partial payment or no payment. Previous balances are usually maintained in conjunction with a low Standard Billing Interval. For example, if annual fees were $100 and the customer paid only $80, iMIS would retain a balance of $20. When the customer is billed next year, iMIS would add the previous balance of $20 to the customer's total balance.

  Note: The Maintain Prev. Balance option applies only to cash-based dues. For accrual-based fees, previous fee balances can be viewed in the individual's AR window because accrual fees billings create invoice records. The PREVIOUS_BALANCE field in the Subscriptions table will not be populated for an accrual fees billing even if the Maintain Prev.

Balance option has been checked.

Note: The Maintain Prev. Balance option must be enabled for a _CREDIT (user-defined credit) to display on a Renewal Notice.

Note: This option does not apply to voluntary contributions (VOL).

Paid Thru Date Update

The options set in this section set the preference for when the Paid Thru date information is to be updated. The Paid Thru date for the cash accounting method is updated with payment in full.

- Update Complimentary Items at Payment Time – Enable to specify that the Paid Thru date for complimentary items (no charge products) be updated at payment time instead of billing time.
- Paid in Full – (This option displays when the Accrual accounting method is enabled.) Enable to specify that the Paid Thru date be updated when full payment of the associated line item is received.
- Billing Time – (This option displays when the Accrual accounting method is enabled.) Enable to specify that the Paid Thru date will be updated when the initial accrual fees billing is performed.

  AR Payment Application

  (This option displays when the Accrual accounting method is enabled.) Enable to sets the preference for distribution of partial payments across multiple-fee line items on the Enter and edit cash receipts window (go to Accounting > Transactions > Enter and edit cash receipts). This option allows the choice of whether a partial payment will be applied based on priority established at the product code level or evenly distributed across each fee-based product billed.
- Priority – (default) Enable to apply payments to each open line item in payment priority order until all open line items are paid. If no pay Priority has been set for the products defined on the Set up products window (go to Accounting > Options > Set up products),

partial payment will be applied to products in alphabetical order.

- Proportional – Enable to apply payments across all the open line items in direct proportion to each line's amount.

  Billing Contact

  Enter the iMIS ID for the person who would like to receive an email message each time someone makes a Billing-related purchase. The email messages is similar to the one the Event Contact receives for an Event purchase.

Set up billing cycles

The final step for Billing setup is to define the necessary billing cycles. The steps for defining billing cycles include the following:

1. Create a new cycle name/edit a current cycle.
2. Select whom to bill.
3. Select what to bill.
4. Define how to present the bill.
5. Select how and when to bill.

   A billing cycle is another name for a billing run. Define a billing cycle to bill a particular group of people for a particular set of products. Two general groups of billing cycles can be set up:

   Customers dues billing

   A billing run used to collect dues for a given set of customers sorted by type, category, or both.

- The Add Member Type Items option on the Set up billing cycles window must be checked. Selecting this checkbox indicates the billing cycle is a dues product billing.
- The overall customer Paid Thru dates and Renewed Thru dates are used to determine who should be billed.

- The customer Join Date month is used to determine the customer term beginning date (anniversary date) for new customers.
- This billing run will automatically bill all items cross-referenced on the Set up customer types to all customers who are selected for billing. Do not select the same dues products that are listed on the Set up customer types window from the scrolling product list on the Set up billing cycles window.
- This billing run will bill only non-customer type products selected on the cycle if an active subscription record already exists for the customer. For example, Include all sections, Include all chapters, and any items selected on the scrolling product list.
- All line items will bill uniformly for the same customer term (for example, beginning date and number of months) based on the value in the Renewal Months field on the Financial tab on the Manage customers window if non-zero, the value in the Renewal Months field on the Set up products window, or the overall system setup Standard Billing Interval setting.
- Can bill for all chapters and/or all sections.

  Non-dues billing

  A separate billing run used to collect payments for optional subscriptions for customers or non-customers.
- The Add Member Type Items option on the Set up billing cycles window must not be enabled (checked).
- Evaluates individual subscription line items' Paid Thru and Billed Thru dates in determining whom/what to bill.
- The Subscription Date Added is used to determine the subscription term beginning date for new subscribers.
- This billing run will bill only items chosen on the cycle if an active subscription record already exists for the subscriber. For example, Include all sections, Include all chapters, and any items selected on the scrolling product list.

- Each item's term (number of months) will be calculated independently based on the first nonzero setting of the individual's subscription Billing Period, the product Renewal Months, the subscriber Renew Months (Financial tab), and the overall system setup Standard Billing Interval.

To create a new billing cycle

1. From Set up billing cycles window, click New.
2. Enter the name of the billing cycle in the Cycle Name field.
3. Select whom to bill:

1. Select the customer types to bill from the Member Types column.
2. Select the Categories to include for this billing cycle.

4. Enable the Other Billing Instructions options, if any.
5. Select the Products to be included in the bill. If you enable the Add Member Type Items option, do not select any customer type-referenced products from the scrolling list.
6. Define how to present the bill:

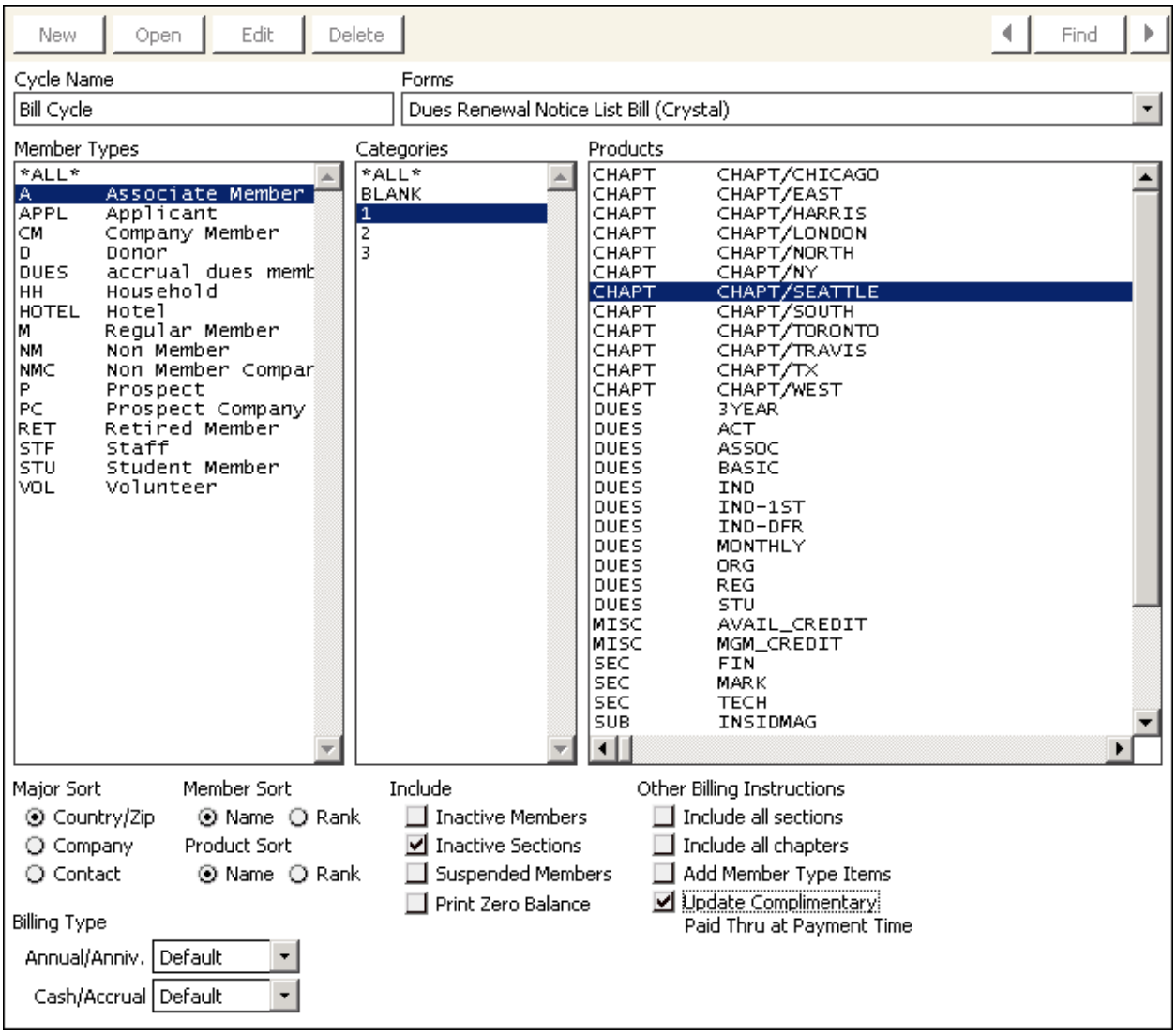
1. Select the renewal notice format for this billing cycle from the Forms list.
2. Select the Major Sort option to be used to sort the order in which the bills are printed.
3. Select the Member Sort option to be used to order the individuals (Ship to) on the list bill.
4. Select the Product Sort option to be used to order the line items on the dues bill.
5. Enable the appropriate Include options, if any, that also need to be billed.

7. In the Annual/Anniv. list, select when the billing cycle should be billed: Annual, Anniversary, or retain the default setting. iMIS defaults to the setting specified on the Set up general options window.
8. In the Cash/Accrual list, select the Cash or Accrual accounting method, or retain the default setting. iMIS defaults to the setting specified on the Set up general options win-

dow.

9. Click Save.

Set up billing cycles window



Admin Console: Configure > Billing > Set up billing cycles

Desktop: Billing > Set up module > Billing cycles

Cycle Name

Indicates the designated name for the group of records from which renewal notices will be generated. This name displays on the Process billing window with a list of available cycles.

Forms

Drop-down list of renewal notice formats

Member Types

A list of available customer types available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (selects range) while you select your selections. To bill all customer types, select *ALL* at the top of the scrolling list. For example, for a subscription cycle where the subscription can be purchased by any customer, select *ALL*.

Categories

A list of categories available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (sequential range) while you select your selections. To bill all categories of customers or subscribers, select *ALL* at the top of the scrolling list. If BLANK is selected, only customers or subscribers with a blank or empty category will be selected.

Products

A list of products available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (sequential range) while selecting other selections. Products selected in this list will be billed only if an active subscription line item already exists for the customer.

For dues product billing, only select products that are optional add-on items to the mandatory or regular dues products. The Add Member Type Items option must enabled. If the Add Member Type Items option is enabled, all products listed on the Set up customer types window for the customer types selected will be billed automatically during this billing cycle. These customer type-referenced products should not be selected on the scrolling list.

Shortcut – To select all chapters (CHAPT) and sections (SEC), enable the Include all sections and Include all chapters options located in the Other Billing Instructions section.

Major Sort

This option specifies the order in which the bills are sorted for printing. The choices include Country/Zip (postal code), Company (company sort), and Contact (individual's last name, first name).

Member Sort

This is used only for list bills (where the dues and/or subscription products for several individuals or branches are itemized on a single bill and sent to a single parent company or a third party). It establishes the order in which the individuals (Ship to) are listed on the list bill. You can sort by Name (last, first) or Rank (under development for a future release).

Product Sort

This option controls the order of the line items on the dues bill. Select Name (to sort alphabetically by product code) or Rank (to sort by the payment priority shown on the Set up products window).

Include

Specific options that are included in the billing cycle, when enabled.

- Inactive Members – Enable to bill customers whose status begins with I (inactive).
- Inactive Sections – Enable to force the billing of SEC-type subscription in which the subscription's status begins with I (inactive).
- Suspended Members – Enable to bill customers whose status begins with S (suspended).
- Print Zero Balance – Enable to print bills with zero balances. For example, if you enable this option, iMIS will generate a bill for a customer who receives a complimentary (zero dollar amount) membership. Not enabling this option causes iMIS to bypass all zero balance bills during the printing process.

Note: This option applies only to bills with a total balance of zero. To suppress the printing of individual zero balance line items when the grand total is nonzero, see the SUPPRESS_ZERO_ITEMS print options.

Other Billing Instructions

Include all sections – Bills all active subscription records of the product type SEC for the customer types selected. If multiple sections exist, all sections will be included.

Include all chapters – Bills active subscription records of the type CHAPT for the customer types selected. If multiple chapters exist, all chapters will be included.

Add Member Type Items – Use for dues billing. This option bills customers for all product codes defined on the Set up customer types window. If this option is enabled, select only those items in the Products list not covered on the Set up customer types window or by the options Include All Sections and Include All Chapters.

Note: When Add Member Type Items is selected, new subscription records will be created only for items included on the Set up customer types window. All other products selected for the dues billing cycle will be billed only if an existing active subscription record already exists for that customer. The Add Member Type Items option must be enabled for dues billing and should not be enabled for non-dues product billing.

Update Complimentary Paid Thru at Payment Time – When enabled, allows the Paid Thru date for complimentary items (no charge products) for this billing cycle to be updated at payment time instead of billing time. During dues billing, iMIS first checks the billing cycle, then the Set up general options window, to determine how to handle complimentary item Paid Thru dates.

Billing Type

Annual/Anniv. – List used to select when the billing cycle should be billed: Annual, Anniversary, or retain the default setting. iMIS defaults to the setting specified on the Set up general options window. You may want to change the setting if you bill dues products annually and subscriptions by anniversary.

Cash/Accrual – List used to s select the Cash or Accrual accounting method, or retain the default setting. iMIS defaults to the setting specified on the Set up general options window. You can select Cash or Accrual if the default accounting method on the Set up general options window is set to Accrual. If you try to set the billing cycle accounting method to Accrual when the dues product accounting method system default is Cash, iMIS displays a message informing you that the accounting method system setup must be changed to Accrual.

Bills/Reminders

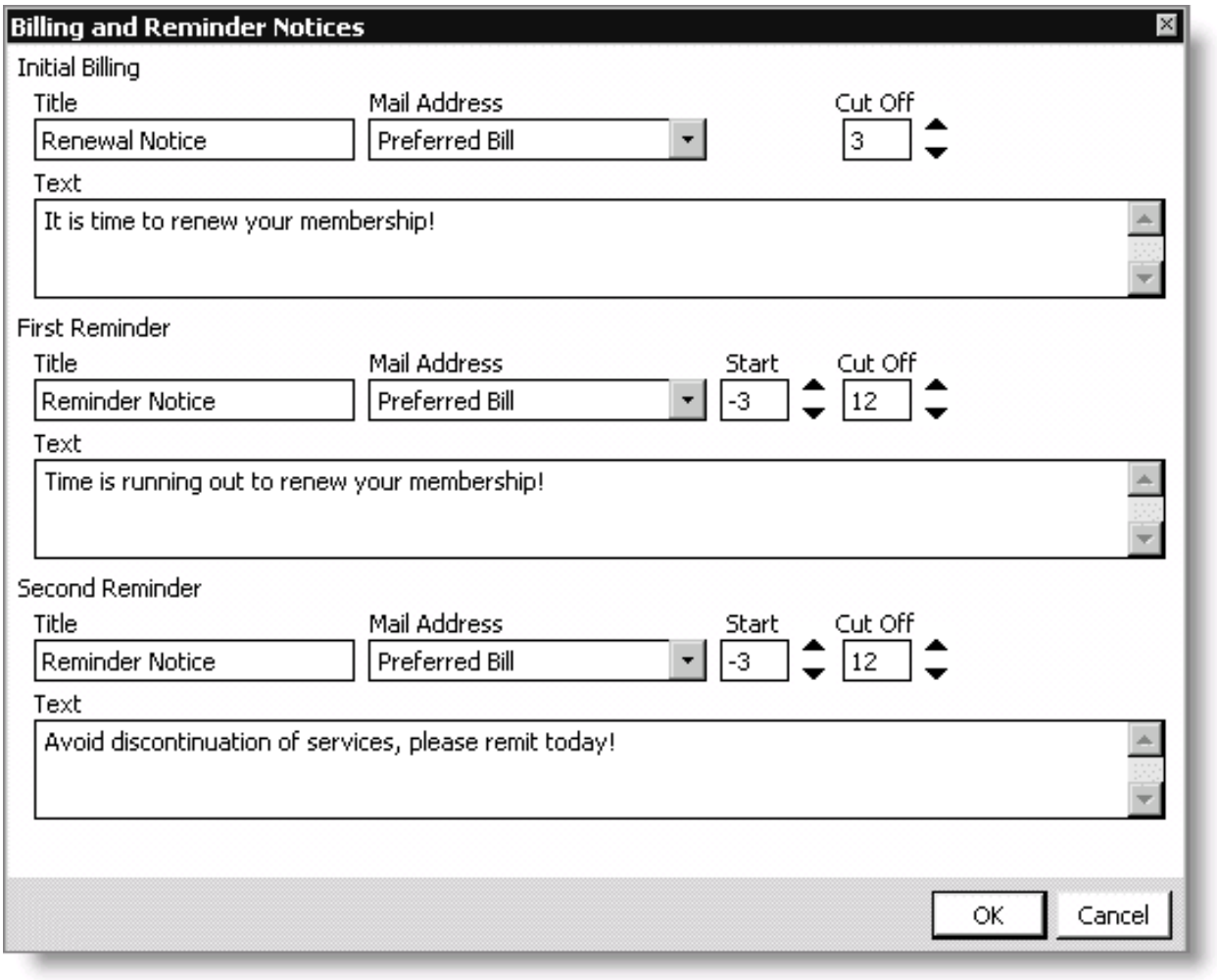
Opens the Billing and Reminder Notices window where you can specify when iMIS should send first and second reminder notices to the customers included in the billing run.

On the Billing and Reminder Notices window, you can enter a title to display at the top of the Billing and Reminder Notice, add overlay text, select a different mail address, and set the default initial and reminder date parameters for each Reminder Notice.

To set the billing and Reminder Notices

1. From Billing and Reminder Notices window, enter the Title information.
2. Select the Mail Address.
3. Enter the customized Text to be added to the billing notice.
4. Select the Initial Billing Cut Off month.
5. Select the First and Second Reminder Start and Cut Off months.
6. Click Save.

Billing and Reminder Notices window



Initial Billing, First Reminder, and Second Reminder

Title – Specifies the title to appear on the renewal or reminder notice. For example, Initial Billing, First Reminder, and Second Reminder. You can specify a title for the following renewal notice formats only: Dues Renewal Notice with Reminder Text, Dues Renewal Notice List Bill, and Dues Renewal Notice - No Remittance Stub

Mail Address – Drop-down list for selecting an address option. Options include Preferred Mail, Preferred Bill, or one of the three address purposes defined on the Customer Setup - Address and Notes window (go to Configure > Membership> Configure membership options, and click Address and Notes).

Text – Customized text to be added to the billing notice. Up to 255 alphanumeric characters can be entered. For most renewal notice formats, the text entered overlays or

prints on the preset renewal notice elements. Therefore, press Enter to shift text down the page far enough to avoid the preset report elements on the form. Full overlay text for all renewal notice formats can be set on the Detail Report Parameters window (go to Utilities> Report Specs, and click Parameters).

Examples of notice-specific text:

- Initial Billing – It is time to renew your membership!
- First Reminder – Time is running out to renew your membership!
- Second Reminder – Avoid a discontinuation of services, please remit today!

Note: This feature is available on the following renewal notice formats only: Dues Renewal Notice with Reminder Text, Dues Renewal Notice List Bill, Dues Renewal Notice - No Remittance Stub, Std. Form ASI-018 DBL Column List Bill, Std. Form ASI-019 Dbl Column List Bill, Std. Form ASI-020-Full Page List Bill, and Std. Form ASI-021-Full Page List Bill.

Initial Billing – Cut Off

Use this option to set the default number of months for calculating the billing Effective Date for anniversary billing cycles. For example, if you typically send out your initial billing three months before the renewal or Paid Thru date expires, set the first Cut Off field to 3 on the Initial Billing. If your current run date is 7/25/2001, iMIS will set the default Effective Date to 10/01/2001 for the initial billing, and will bill all customers whose Paid Thru date expires before that date and who have not been billed previously.

On an annual cycle, the Effective Date should always coincide with the first day of the fixed term. iMIS will calculate the Effective Date based upon the First Month of Fiscal Year set on the AR Cash
Set up module window. The default always assumes the billing applies to the current fiscal or fixed year. Override the year when you run next year's renewal cycle in advance.

Note: The default Effective Date can be overridden as needed at dues product billing time. If you want to override the Effective Date, make the change after selecting a billing

cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

First and Second Reminder Start and Cut Off

Use this option to set the Start and Cut Off parameters used to calculate a date range for selecting outstanding billings. The date range, which should include the outstanding bill's original date or Run Date, is determined by subtracting the number of months set in the Start and Cut Off month field from the run date.

For example, if first reminders are typically sent one month after the Initial Billing, specify -2 for the Start field and -1 for the corresponding Cut Off field. In the following example, the current run date is 7/25/2001. iMIS will set a default begin and end date range and print First Reminder renewal notices for those customers whose initial billing was run between 5/01/2001 and 6/01/2001 inclusive and who are currently not paid.

If you want to remind your customers more than twice, set up an additional billing cycle for printing Reminder Notices 3, 4, and so forth to make processing your additional Reminder Notices easier. When you use the Third, Fourth, and Fifth Reminder Notices from a second billing cycle, iMIS will automatically calculate the reminder start and end dates based on the Start Month set up on the Billing and Reminder Notices window. After the initial bill is printed, the Subscriptions.REMINDER_COUNT field changes from 0 to 1. After the first Reminder Notices is printed, it changes to 2 and will stay at 2 even after you run a 3rd, 4th, or 5th Reminder Notice.

Set up billing products

The Set up billing products window is used to define or create product codes for products that will be billed or for which your organization collects money. The Set up billing products window defines product line items, default pricing, and entity and General Ledger account information.

Only products with defined product codes can be billed. One product code should be created for each potential dues or subscription-type product or service that will be billed. Unless General Ledger account numbers vary by Customer type, a single, primary membership dues product can be established.

Note: To determine a price for a given product, iMIS first looks to see if a price is set on the Special Pricing window. If no price is set on the Special Pricing window, iMIS then checks the Set up customer types window. If no price is set or the Comp option is not enabled on the Set up customer types window, iMIS then looks on the Set up billing products window.

To define a new product code

1. From Set up billing products window, click New.
2. Enter a Product Type.
3. Enter a Code that identifies the product.
4. Enter a descriptive Title for the billing product. This title will display on the customer's bill and on other windows.
5. (optional) Enter a detailed description in the Desc. field.
6. (optional) Set the Standard Price information. As a rule of thumb, if the product will be cross-referenced to a customer type through the Set up customer types window, do not enter an amount in the Standard Price area.

1. Enter the default standard customer pricing, if any, in the Regular field.
2. Enter the default non-customer pricing, if any, in the Non-Member field. Even if the same rate for customers applies to non-customers, enter the rate again in the Non-Member price field.
7. Enter the G/L Acct. number. (Required for iMIS G/L interface users)
8. (optional) Enter the Deferred account number. This field is available only when iMIS is licensed for the Deferred Income module.
9. (optional) Select the appropriate prorating rule.

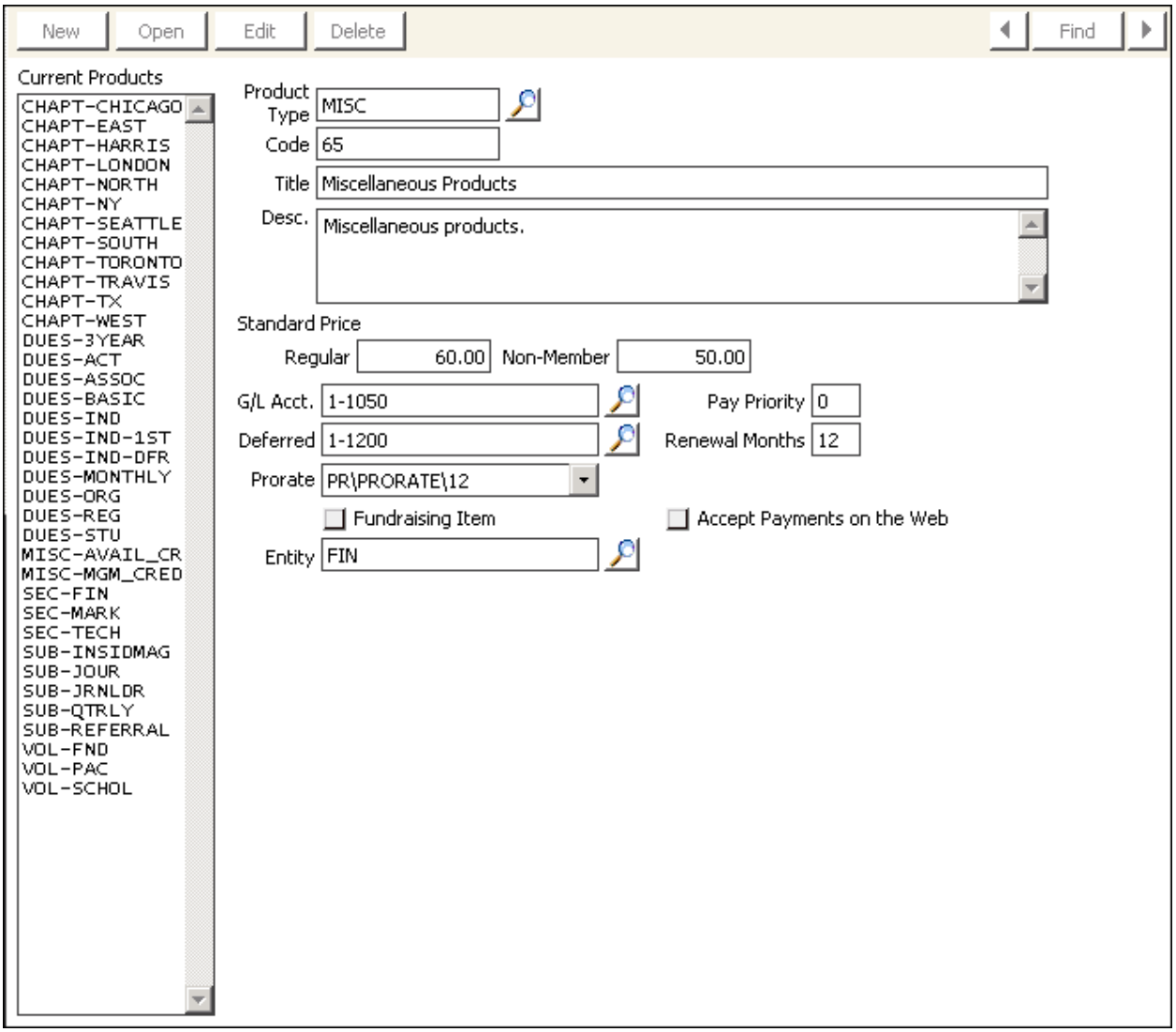
   Caution! Do not select a prorating rule if the Do Not Prorate option or the Standard Prorating option is selected on the Configure billing options window.

10. (optional) Select the Fundraising Item checkbox if the product is a fundraising product. When the Fundraising Item checkbox is selected, the Fair Market Value, Appeal, and Campaign fields are activated, and the Entity field is changed to the Fund field.
11. (optional) Choose the financial Entity or Fund.
12. (optional) For fundraising products, enter fundraising information (Appeal, Campaign, and Fair Market Value).
13. (optional) Enter the Pay Priority.
14. Enter the Renewal Months if you want to override the Standard Billing Interval set on the Set up general options window.
15. Click Save.

    Note: Chapter product codes are usually added on the Chapters window (go to Configure > Membership > Set up tables > Set up chapters). Pricing for CHAPT type products can be set on the Set up products window.

    Note: If a product code will be linked to a customer types, the pricing for the product code should be set in the Dues Billing section on the Set up customer types window or on the Special Pricing window. Do not set the pricing for a mandatory product item on the Set up products window.

Set up billing products window



Admin Console: Configure > Billing > Set up billing products

Desktop: Billing > Set up module > Products

Current Products

List of defined products.

Product Type

The product type is a system-maintained code that allows iMIS Billing to manage the relationships among files and other modules that are affected by billing.

- CHAPT – Separate dues for chapter or local groups – Use this code for separate chapter membership dues. Chapter products are created automatically when you insert entries on the Chapters window (go to Configure > Membership > Set up chapters) or when you populate the Chapter field on the Status tab in the Manage customers window. To allow chapter billing, a dollar amount must be assigned to the chapter product, either at the product level or at the special pricing level. If CHAPT is entered in the Product Type field, CHAPT is automatically populated in the Code field and a chapter can be entered in the Chapter field, which displays next to the Code field.
- DUES – Regular membership dues – Use this code for all normal membership dues items. This code normally is used for standard non-optional dues line items that are cross-referenced on the Set up customer types window.
- MISC – Reserved for miscellaneous charges. Normally, special pricing rules dictate the conditions for charging for a miscellaneous item.
  For example, special pricing rules that are based on the Join Date.
- SEC – Sections and specialty groups – Use this code for optional add-on section memberships such as professional specialty groups. Generally, this type would not be put on the Set up customer types window because SEC normally represents groups that are joined only by request. After a customer has subscribed to this product type, iMIS enables you to automatically bill for initial billing and renewals through cycle definition rules.
- SUB – Magazine/journal subscriptions – Use this code for optional subscriptions such as journals and magazines. This product type would not be put on the Set up customer types window because SUB items are optional. After a customer has subscribed to this product type, iMIS enables you to automatically bill for initial billing and renewals through cycle definition rules.
- VOL – Voluntary contributions – Use this code for non-mandatory contributions such as PACs or foundations. VOL typically will be cross-referenced on the Set up customer types window. However, open items of this product type will not appear on Reminder Notices unless non-voluntary items within the same cycle still have open balances.

  Label Preference

Displays when Use Product Label Preferences is enabled on the Customer Setup - Address and Notes window.

Code

Specifies a key word that identifies the Product. The code entered should not contain any spaces or special characters other than an underscore (_), and should contain no more than 15 alphanumeric characters. This code is used in the Billing Codes field on the Set up customer types window. Select the lookup icon to search field values.

Note: Product codes that end in _Credit can bill and retain negative or credit balances. For example, the code AVAIL_CREDIT can be used to apply overpayments to offset next year's dues.

Title

Enter a descriptive title of the Product Type in this field. When a billing item is referenced on data entry screens and Renewals Notices, the title will appear next to, or in place of, the billing code.

Desc.

(optional) Enter a detailed description of the product in this field.

Standard Price

Enter the default price for customers and non-customers. Unless the billing interval is overridden in the Renewal Months field, the dollar amounts entered for the products should be in agreement with the Standard Billing Interval set on the Set up general options window. For example, the rate for a product is $120 per year. Enter the flat rate of $120 when the Standard Billing Interval is 12 (every 12 months or annual), $10 when the interval is 1 (once per month), and $240 when the interval is 24 (every 24 months or 2 years).

Different rates for customers and non-customers can be entered.

- Regular – Default standard customer pricing. An entry in the Set up customer types window will override the Standard Price, and an entry in Special Pricing will override both

customer-type pricing and Standard Price.

- Non-Member – Default non-customer pricing if there is no entry in Special Pricing or in the Set up customer types window.

  Note: A dollar amount specified on the Set up customer types window will override the Standard Price for that particular customer type. Special pricing rules will override fee amounts defined on either the Set up customer types window or in the Standard Price section.

  G/L Acct

  Enter the general ledger account that will be credited when the payment is received or when the income is recognized. Select the lookup icon to search for values.

  Pay Priority

  Enter the order in which payments are applied to multiple billing product lines. This can be used to sort the line items during a product billing or on Renewal Notices. A lower number has a higher priority than a larger number. For example, a product with priority 1 will appear on the payment and renewal list before a product with a priority of 2.

  Deferred

  Enter the deferred income balance sheet account that should receive the credited amount. This option is available only when the system is licensed for the add-on Deferred Income module. A deferred income account should be entered if your system is licensed for the Deferred Income module and the income for this product type should be deferred and recognized during the customer or product term. Select the lookup icon to search for values.

  Renewal Months

  (optional) Indicates the number of months that the dues product type will be renewed for when payment is received. This number will override the Standard Billing Interval set on the Set up general options window if the product is being billed on a non-dues cycle. The

product's Standard Billing Interval will be used only for pricing determination on the dues billing cycle.

For example, an individual purchases a journal subscription as of 9/1/2001. The journal is set as a product with a rate of $45 for both customers and non-customers, with Renewal Months set at 60 months (five years). On a non-dues billing cycle, the journal line item will be billed for $45 with a Paid Thru date of 8/31/2006.

Prorate

Use this drop-down list to identify the Special Proration table for this specific product. These rules were defined through the Special Pricing window (see Defining Prorating Rules). This feature allows reduced rates for new customers who join after the annual customer term.

Caution! Do not select a prorating rule if the Do Not Prorate or the Standard Prorating option is selected on the Set up general options window (see Configure billing options).

Fundraising Item

When selected, designates a fundraising product. Checking this box activates the Appeal, Campaign, and Fair Market Value fields and changes the Entity field to the Fund field.

Accept Payments on the Web

(optional) Enable this option if you want line items billed for this product using the Cash accounting method to appear in the Public view under Contacts > Contact Management > Billing.

Entity/Fund

(optional) Specifies the financial entity to which income from this product is assigned. When the product is a standard product, the field is labeled Entity and the lookup list contains all org codes defined on the system. When the product is a fundraising product, the field is named Fund and the lookup list contains only those org codes that are defined as funds.

Appeal

(Fundraising products only) Specifies the Fundraising appeal (if any) to which this product is tied.

Campaign

(Fundraising products only) Specifies the Fun Raising campaign (if any) to which this product is tied.

Fair Market Value

The fair market value, for tax purposes, of a fundraising product.

Subscription Info

(Displays only if you have the Advanced Subscription module installed and the product code is SUB). Opens the Publication Information window where you can enter Zone Table and Postal Sort information.

Special Prices

Opens the Special Pricing window where you can define pricing rules for products.

To define special pricing

1. Go to Accounting > Options > Set up tables > Set up products.
2. Select a value from the Current Products list to which special pricing will apply (for example, DUES-BASIC).
3. Click Special Prices to open the Special Pricing window. The product code selected from the Set up products window automatically displays in the Product field on the Special Pricing window.
4. Click New. The Base Amount field displays.

   Note: To modify an existing rule, select the rule and click Edit.
5. Define a special pricing rule by entering the Type, Description, and Base Amount. Other options may also be selected such as Flat Amount, Exact Match, and so forth.

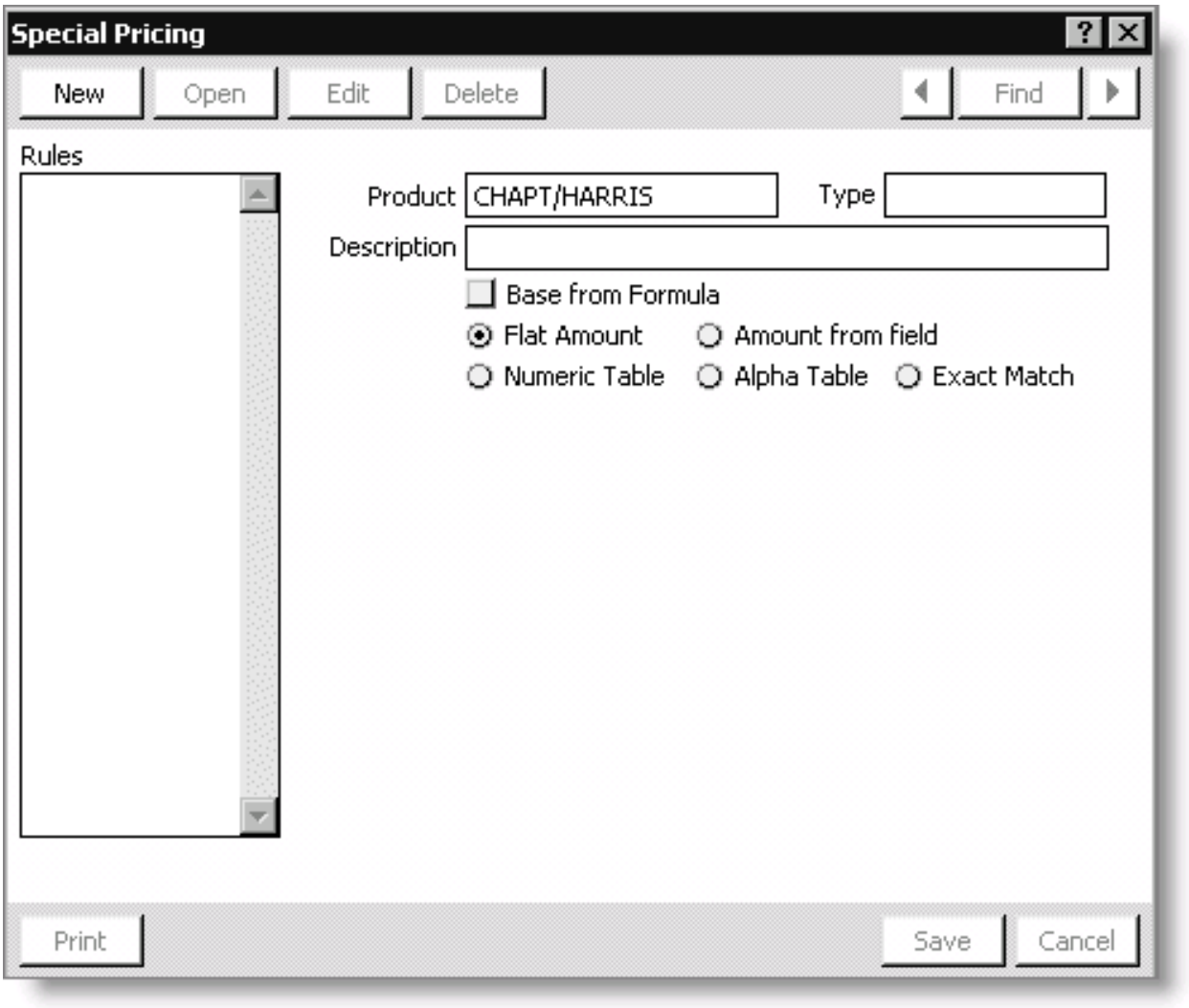
Note: Some pricing rules require a basic understanding of SQL and user-defined fields. See a SQL manual for information about entering SQL commands.

6. Click Save.

To create a new billing category

1. Go to Configure > Membership > Configure membership options.
2. Click Basic Options to open the Customers Setup - Basic Options window.
3. Click Edit.
4. Enable the Use Bill Categories option.
5. Click Save.
6. Go to Configure > Membership > Set up tables > Set up lookup/validation tables.
7. Select CATEGORY from the tables list.
8. Click New.
9. Enter the billing Code. The Code field must be 5 characters or less; otherwise, it will not display in the Category drop-down list under Customers.
10. Enter a Description that will help identify the billing code.
11. Click Save.

Special Pricing window



Rules

A list of defined special pricing rules.

Product

Displays the product type that was selected on the Set up products window.

Type

Specifies the customer type or the customer type/optional category combination (customer type and category codes are separated by a forward (/) slash.)

To define special prices for a predefined category, open the Set up general look-up/validation window to check for the correct category.

Description

Enter a detailed description of the billing rule for the specified customer type. This field is for reference only and is not displayed on any bill or report.

Base from Formula

Enable when a formula is to be added to the base amount. This option is available only when the Numeric Table, Alpha Table, or Exact Match option is enabled.

Flat Amount

Use this setting for assigning customer type fees that vary by billing category or rates for non-customer type products whose fees vary by customer type. If you select this option, enter a Base Amount value.

Amount from field

Use this setting to reference an exact rate or to enter a formula that calculates a rate based upon a field. If you select this option, enter
a user-defined field in the Source Field. For example, Name_All.ACTIVITY_FEE, or an SQL calculation that references such fields.

Numeric Table

Use this setting to vary rates according to numeric values. You can establish sliding rates based on income/volume, or rates based on length of certification. This option supports a maximum of 20 rows and prompts you to enter numeric values (units/code) and rates (base amount) that serve as starting levels for applying pricing guidelines. An optional additional per-unit charge can be entered in the Amt/Add'l Unit field.

Alpha Table

This field prompts you to complete a table of alphanumeric values. Like the Numeric Table option, this option looks for a range rather than an exact match. Use this setting to create sliding rates based on values matched to alphanumeric or character fields.

Exact Match

Use this field to restrict a character field to an exact match. Enter a setting to create exact rates based on values exactly matched to character fields.

Source Field

Specifies a user-defined field that references the value entered in the Amount from field field. This option is available only when the Amount from field, Numeric Table, Alpha Table, or Exact Match option is enabled.

Units/Code

Specifies the numeric values that serve as starting levels for applying pricing guidelines. This option is available only when the Numeric Table, Alpha Table, or Exact Match option is enabled.

Base Amount

Specifies a rate that serve as a starting level for applying pricing guidelines. This option is available only when the Flat Amount, Numeric Table, Alpha Table, or Exact Match option is enabled.

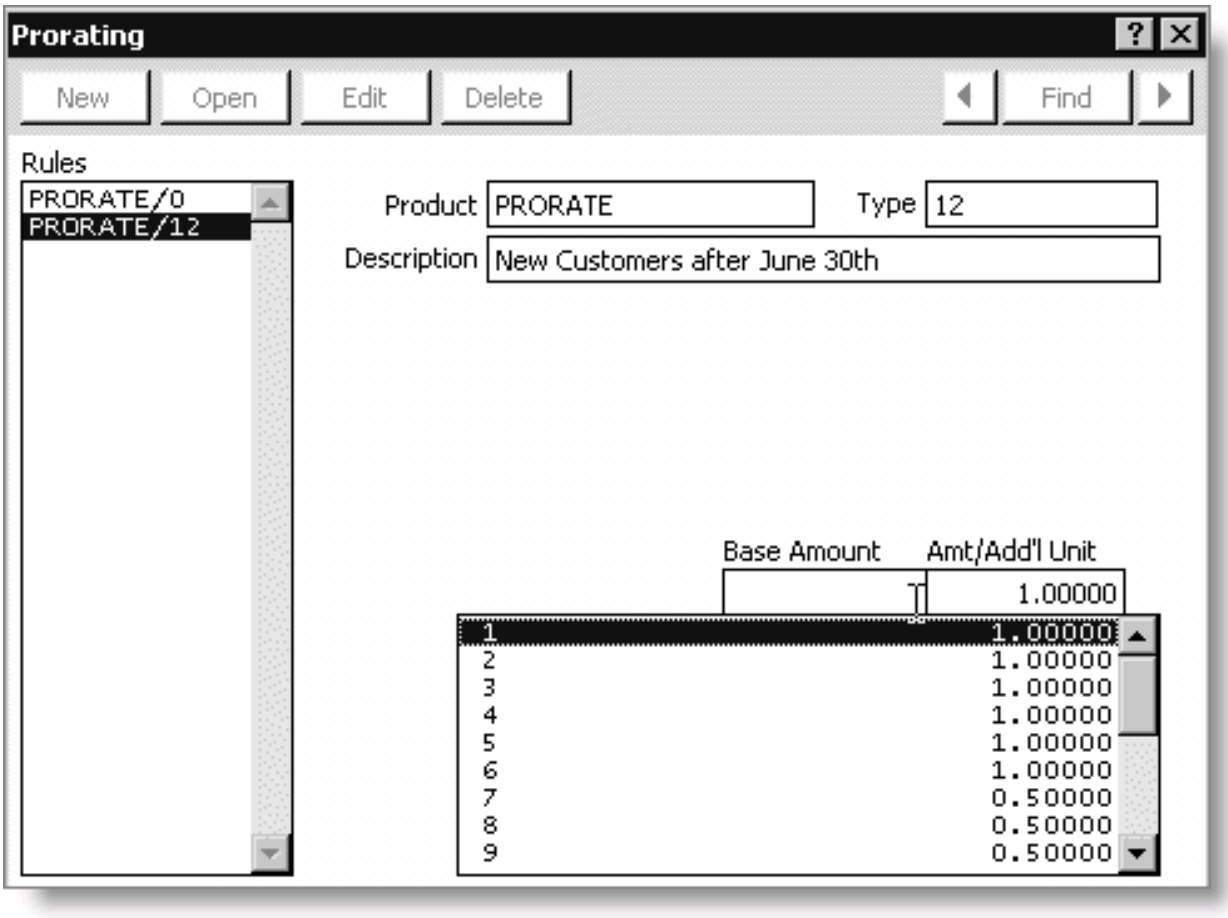
Amt/Add'l Unit

Specifies an optional additional per-unit charge. This option is available only when the Numeric Table option is enabled.

Prorate Rules

Opens the Prorating window where you can specify an amount to an activity or product that is proportional to some base.

Prorating window



Rules

List of defined prorating rules.

Product

This field is automatically populated with PRORATE. You can edit this value.

Type

Indicates the number of months in the billing period. This number must agree with either the Product Renewal Months, on the Set up products window or the Standard Billing Interval on the Billing Set up general options window .

Description

Specifies a detailed description of the prorating rule.

Prorating Table Entries

The entries in the prorating table specify the amount that a customer is charged. For example, if month 1 represents an on time payment, for which a customer is charged a full fee (100%), the Amt/Add'l Unit field will contain a 1. There must be one table entry for each month in the renewal cycle as defined in the Type field.

Base Amount

Specifies refinements (if any) to the prorating rule. The following codes can be entered in this field:

- F (Future Credit) - Postpones the prorating discount to the second billing year.
- B (Bump Date) - Advances the end of the billing term to the end of the next term. The amount charged depends on the multiplier entered in the Amt/Add'll Unit field.

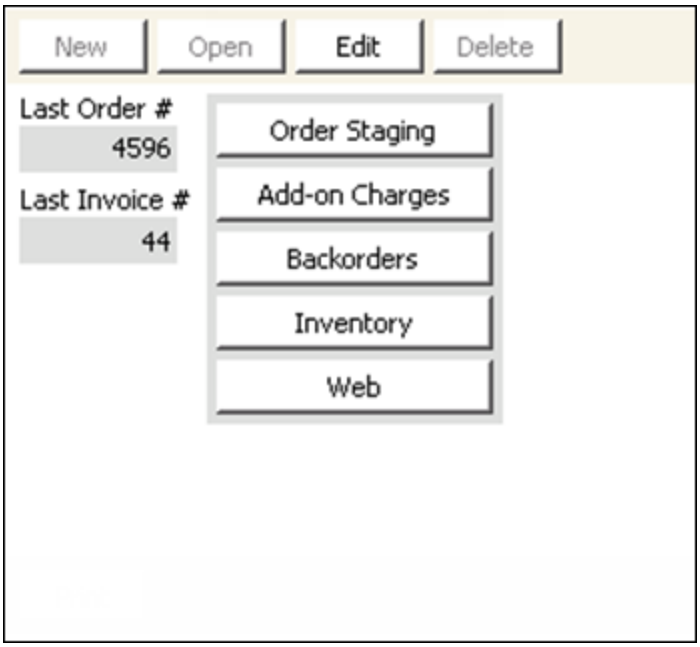
Amt/Add'l Unit

Indicates the percentage of the full price to charge customers.

Commerce

Configure commerce options

The iMIS Orders feature has its own system setup used for setting the defaults and parameters needed for managing and processing order transactions and product inventory. You set up your Orders module through the Configure commerce options window.



Admin Console: Configure > Commerce > Configure commerce options
Desktop: Orders > Set up module

Last Order #

(read only) Displays the order number of the last order entered.

Last Invoice #

(read only) Displays the invoice number of the last order invoiced.

Note: Several configuration options on the Configure commerce options window are documented within the iMIS Desktop. The following links will display iMIS Desktop documentation. This saves you time and effort when configuring commerce options.

Order Staging

The Order Status Defaults window button opens the Order Status Defaults window used for defining the defaults for the system-defined order type categories.

Add-on Charges

The Add-on Charges window button opens the Add-on Charges window used for enabling sales tax for freight and handling charges, for selecting a default shipping method, and for defining freight, handling, and restocking charges.

Backorders

The Backorder Processing window button opens the Backorder Processing window used for enabling and defining Automatic Backorder Processing.

Inventory

The Inventory System Setup window button opens the Inventory System Setup window used for defining default inventory options and default accounts.

Web

The Web Order Options window button opens the Web Order Options window used for defining options for sales transactions over the Web.

Set up warehouses

To define inventory parameters for multiple warehouses on the Warehouses window, the warehouses first must be defined on the Set up warehouses window (from Orders, select Set up warehouses). If the warehouses are not defined on the Set up warehouses window, you will not be able to define inventory parameters for them.

The Set up warehouses window is accessed from the Set up warehouses task-list item. The Set up warehouses item displays under the Orders task list only if the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (go to Configure > Commerce > Configure commerce options). Warehouse locations and descriptions defined on the Set up warehouses window are stored in the Product_Location table.

To define a warehouse

1. From Set up warehouses window, click New.
2. Enter a warehouse Code.
3. Enter a Description for the warehouse.

4. Click Save.

To edit a warehouse description

1. From Set up warehouses window, select a warehouse code from the list of Warehouses.
2. Click Edit.
3. Edit the warehouse's Description.
4. Click Save.

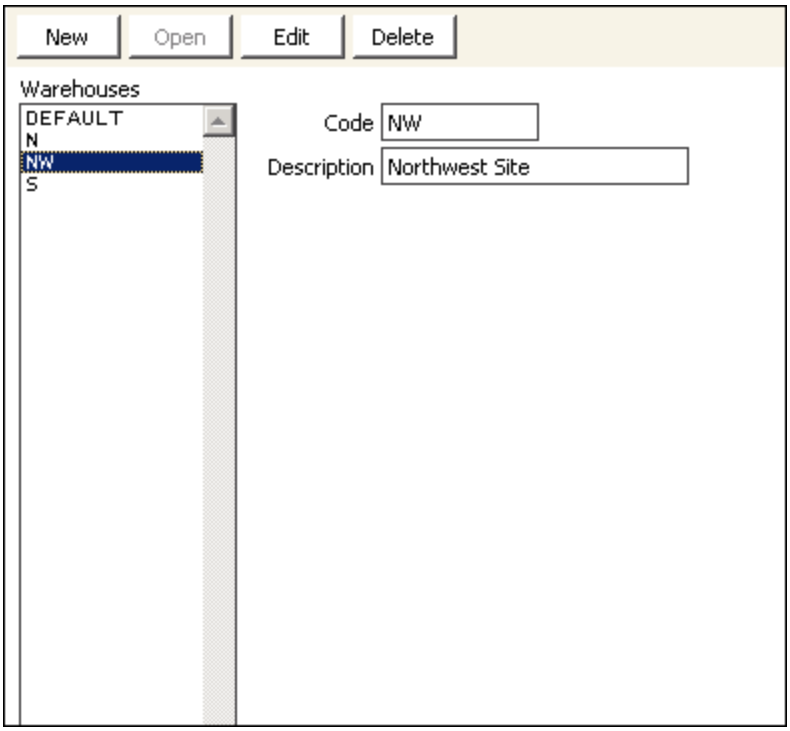
To delete a warehouse

You can delete a warehouse from the Set up warehouses window only if the following conditions are true:

- The warehouse is not the Default warehouse for any product.
- No orders are open for products stored in the warehouse.
- The warehouse is empty of all inventory.

1. From Set up warehouses window, select the warehouse you want to delete from the list of Warehouses.
2. Click Delete.

Set up warehouses window



Admin Console: Configure > Commerce > Set up warehouses
Desktop: Orders > Set up warehouses

Warehouses

Lists all defined warehouse codes.

Code

(required) Enter a warehouse code or location. The Code field is disabled during Edit mode.

Description

Enter a warehouse description.

Set up order types

Order types determine the processing stages for orders, and you must define your order types before you can enter and process orders. Each time you enter a product order, you

must select a defined order type. Order types that have been assigned orders cannot be deleted.

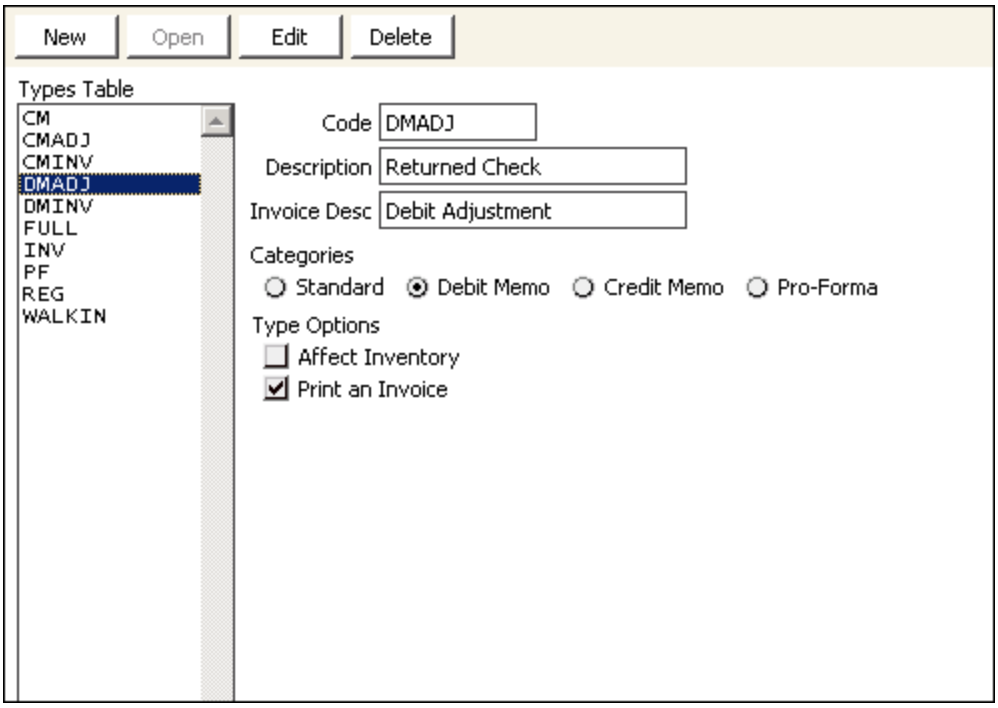
Order types fall into one of four system-defined order type categories: Standard, Debit Memo, Credit Memo, or Pro-Forma. You can define an unlimited number of order types for each order type category.

The category selected for an order type determines the available Type Options, or order processing stages, for the order type. Of the available Type Options, you select which are required, and you determine if an order type affects inventory. Order types are defined on the Set up order types window.

To define order types

1. From Set up order types window, click New.
2. Enter a Code for the order type.
3. Enter a Description for the order type.
4. Enter a description of the invoice in the Invoice Desc field.
5. Select a category for the order type from the list of Categories.
6. Enable the applicable Type Options.
7. Click Save.

Set up order types window



Admin Console: Configure > Commerce > Set up tables > Set up order types

Desktop: Orders > Set up tables > Order types

Types Table

This list displays the defined order types.

Code

Enter the code for an order type.

Description

Enter a description of the order type.

Invoice Desc

Enter a description of the invoice generated for the order type. The description entered in the Invoice Desc field prints on invoices.

Categories

Order types are classified according to one of the following four system-defined categories. You must enable one of the categories for each order type you define. The category selected determines which Type Options display when defining an order type.

- Standard – Enable to classify an order type as a standard order.
- Debit Memo – Enable to classify an order type as a debit memo order.
- Credit Memo – Enable to classify an order type as a credit memo order.
- Pro-Forma – Enable to classify an order type as a pro forma order. Create pro forma order types only after defining standard order types. This allows you to specify a valid standard order type in the Convert to Order Type field on the Order Status Defaults window (go to Configure > Commerce > Configure commerce options and click Order Staging) for converting pro-forma orders to standard orders.

Type Options

These options allow you to define the order processing stages for an order type. An order type's category determines the Type Options that display on the Set up order types window:

- Affect Inventory – Enable if you want the order type to affect product inventory. For example, a standard order would reduce a product's physical inventory, and a credit memo order would increase a product's physical inventory if the Affect Inventory option were enabled.
- Print an Invoice – Enable if you want the order type to generate a printed invoice for invoiced orders.
- Pick List – (Displays for standard orders only) Enable to process the order type through the Print pick list order processing stage. A Pick List will print for the order type.
- Shipping Paper – (Displays for standard orders only) Enable to process the order type through the Print shipping papers order processing stage. Shipping papers (Packing Slips) will print for the order type.

- Print a Quote – (Displays for pro forma orders only) Enable to process the order type through the Print quotes order processing stage. An order Quotation will print for the order type.
- Convert to Order Type – (Displays for pro forma orders only) Enter the default order type for converted pro forma orders.

Set up product categories

Product categories allow you to classify your products, and you must define your product categories before defining your individual products. Each time you define a product, you must assign it to one of your product categories.

Product categories are used to assign default accounts and to enable category options for groups of products.

To define product categories

1. From the Set up product categories window, click New.
2. Enter a code for the product category in the Category field.
3. Enter a Description of the product category.
4. Enable the applicable Category Options.
5. Enter the User Defined Field Captions that will display and generate text boxes on the Product Detail window.
6. Enter any applicable Default Accounts.
7. Click Save.

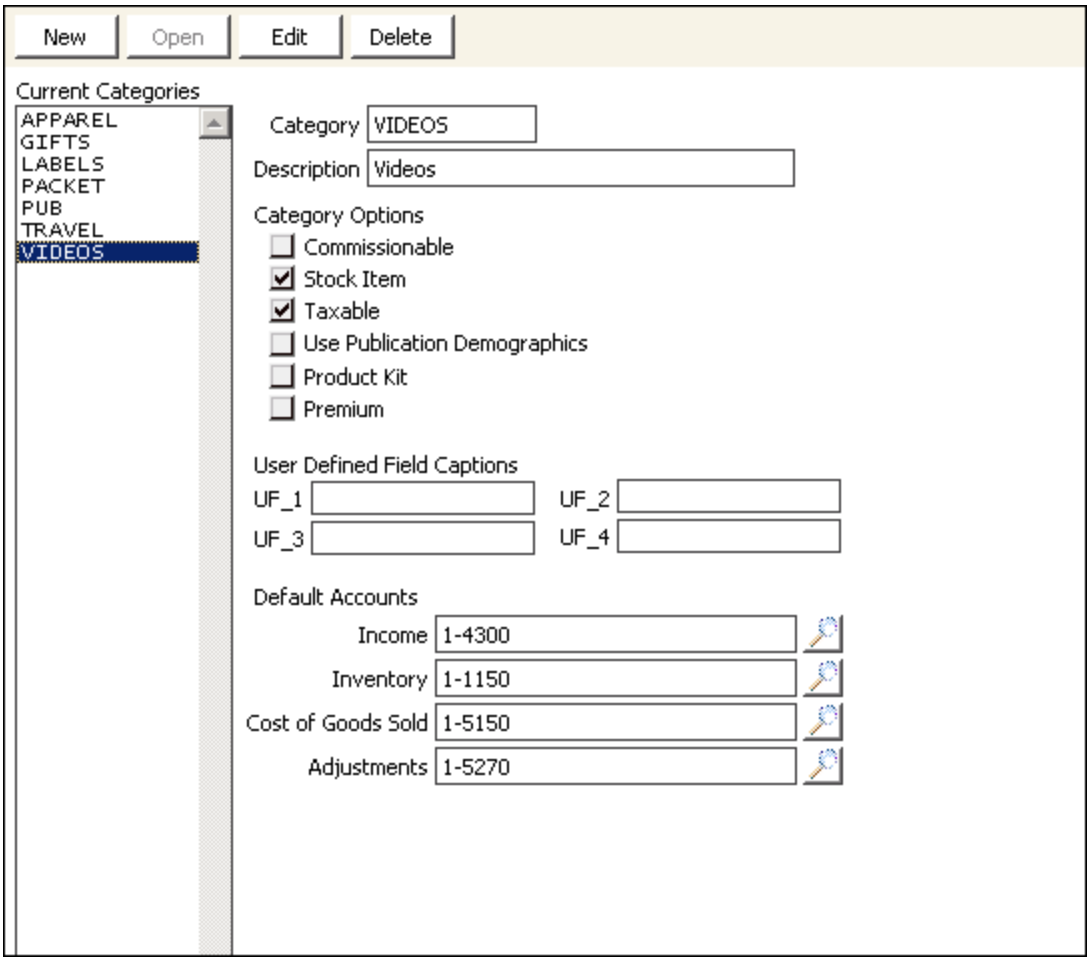
To define product categories for kits

If you are licensed for product kitting, iMIS Orders allows you to sell product kits. A kit consists of multiple products sold as a single unit for a single price.

If you plan to sell product kits, you can define product categories that set default options on the Manage products window, such as Commissionable, Taxable, and Product Kit. After defining your product kit categories, you can define your product kits:

1. From the Set up product categories window, click New.
2. Enter a code for the product category in the Category field.
3. Enter a Description of the product category.
4. Enable the applicable Category Options.
5. Enable the Product Kit option.
6. Enter any applicable Default Accounts.
7. Click Save.

Set up product categories window



Admin Console: Configure > Commerce > Set up tables > Set up product categories

Desktop: Orders > Set up tables > Product categories

Current Categories

This list displays the defined product categories.

Category

Enter a code for the product category.

Description

Enter a description of the product category.

Category Options

Enable the options that you want enabled by default when defining new products on the Manage products window (go to Home > Commerce > Enter and edit products). You can override all settings at the product level.

- Commissionable – Enable if you want the sale of a product within a category to generate a commission. The Comm % field displays when you enable the Commissionable option.
- Comm % – (Displays only when the Commissionable option is enabled) Enter the default commission rate generated by the sale of a product in this category. For example, a 5.00 % commission rate would generate a $5.00 commission on a $100.00 sale. Make sure to enter the rate as a percentage and not as a decimal.
- Stock Item – Enable to indicate that products within this category have physical inventory. You can track inventory only for items stocked in inventory.
- Taxable – Enable to indicate that the product category is taxable.
- Use Publication Demographics – Enable to define publication demographic information for a category's products. If the option is enabled, the Publication button displays and enables on the Manage products window for products belonging to that category. Clicking the Publication button on the Manage products window opens the Publication Demographics window used for defining demographic information for publications.
- Product Kit – Enable to indicate that the product category consists of product kits.

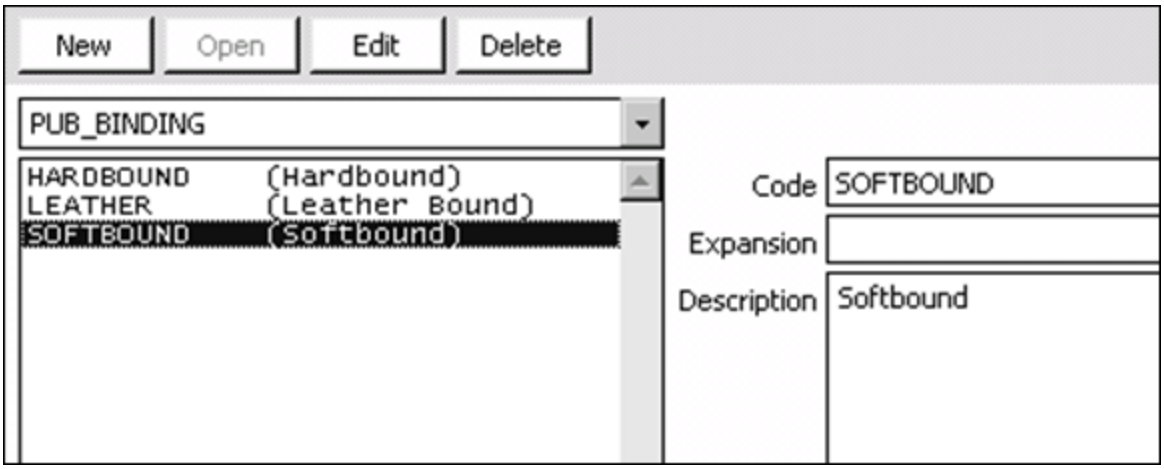
User Defined Field Captions

(optional) Enter captions in the UF_1, UF_2, UF_3, and UF_4 fields that will display on the Product Detail window. Each caption that you define generates a text box on the Product Detail window for products belonging to that category. You can define the same or different captions for any product category.

When entering or editing an order, some products may require additional order information before an order can be shipped. The user-defined fields on the Product Detail window allow you to record this additional information.

You also have the ability to define general lookup/validation tables for each of the user-defined fields, and any predefined data can be accessed by selecting each field's Find icon on the Product Detail window. Regardless of whether general lookup/validation tables have been set up, you always have the ability to enter any necessary order information.

General lookup/validation tables are set up for product category user-defined fields by combining the product category codes and field labels defined on the Set up product categories window. When setting up a table for a user-defined field, the product category code and field label must be separated by an underscore. For example, if the product category code is PUB and the field label is Binding, the general lookup/validation table for the user-defined field would be PUB_BINDING as displayed in the following example:



Example of a general lookup/validation table set up for a user-defined field

Default Accounts

These accounts allow you to define the default accounts for products within this category. You can override the accounts at the product level on the Accounting window and at the warehouse level on the Warehouses window if Multi-Warehouses is enabled.

When defining product-level accounts, the most specific accounting information takes precedence. For example, iMIS first looks for warehouse level accounts. iMIS then looks for product level accounts. If you have not defined product-level accounts, iMIS uses the default product category accounts. If you have not defined default product category

accounts, iMIS uses the accounts defined on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

- Income – Enter a product category's default income account number.
- Inventory – Enter a product category's default inventory account number.
- Cost of Goods Sold – Enter a product category's default cost of goods sold account number.
- Adjustments – Enter a product category's default adjustments account number.

Web Options

Opens the Web Options window for the selected product category. The Web Options window is used for enabling products either for sale or for viewing on the Web.

You can enable product categories to be viewed or sold on the web using the Web Options window. Individual products can also be enabled for the web.

To enable a product category for the Public view

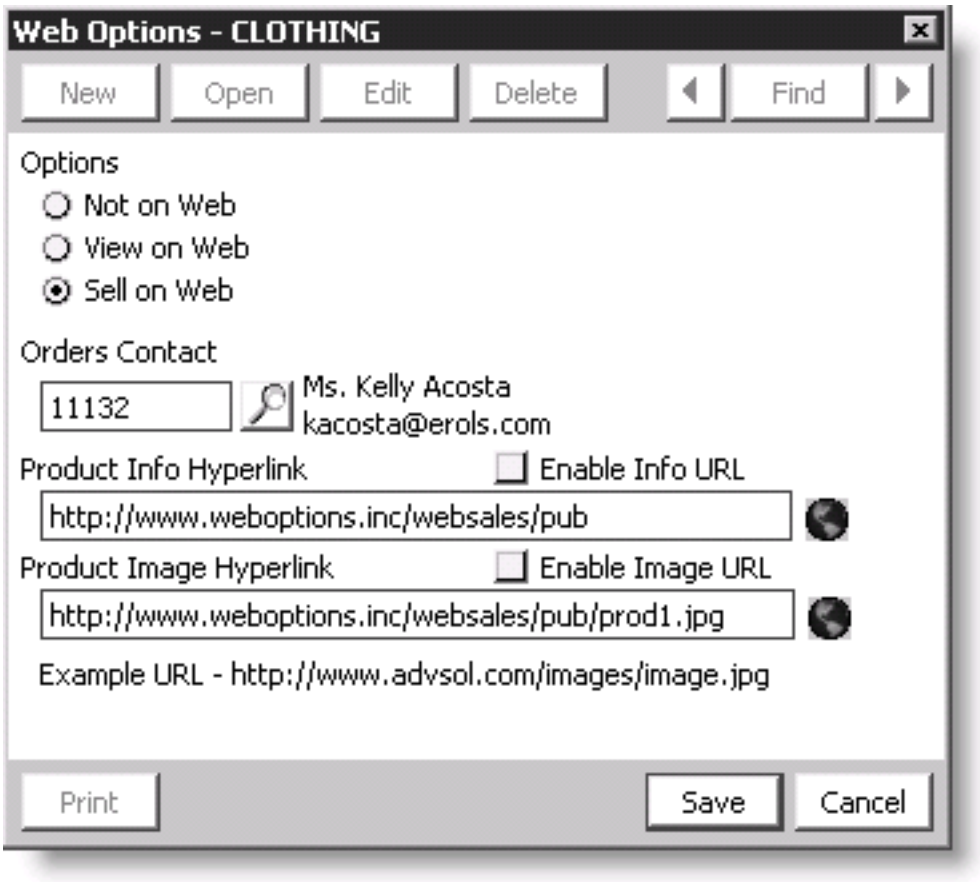
1. Go to Configure > Commerce > Set up tables > Set up product categories.
2. Select a product category from the list of Current Categories.
3. Click Edit.
4. Click Web Options to open the Web Options window.
5. Enable the product for the Web:

- Enable the View on Web option if you want the product category to be viewed, but not sold, on the Web.
- Enable the Sell on Web option if you want the product category to be viewed and sold on the Web.

6. Enter the Product Info Hyperlink.
7. Select the Enable Info URL option.
8. Enter the Product Image Hyperlink.

9. Select the Enable Image URL option.
10. Click Save.

    Web Options window for product categories



    Options

    The viewing option selected at the product category level overrides the viewing option selected at the product level for web products.

- Not on Web – Prevents the category from being viewed or sold on the Web.
- View on Web – Allows the category to be viewed, but not sold, on the Web.
- Sell on Web – Allows the category to be viewed and sold on the Web.

    Orders Contact

    Specifies the contact to notify when purchases from this category are made.

Note: You can specify a contact to notify about web purchases in the E-mail address to notify when a product is sold field on the Organization Configuration window (System Setup > Set up web components > Organization Configuration).

Product Info Hyperlink

Enter a URL to information about the product category. Click the web icon to view the product category's information on the web.

Enable Info URL

Enable to enable the hyperlink to the product category's information.

Product Image Hyperlink

Enter a URL to an image representing the product category. Click the web icon to view the product category image on the web.

Enable Image URL

Enable to enable the hyperlink to the product category's image.

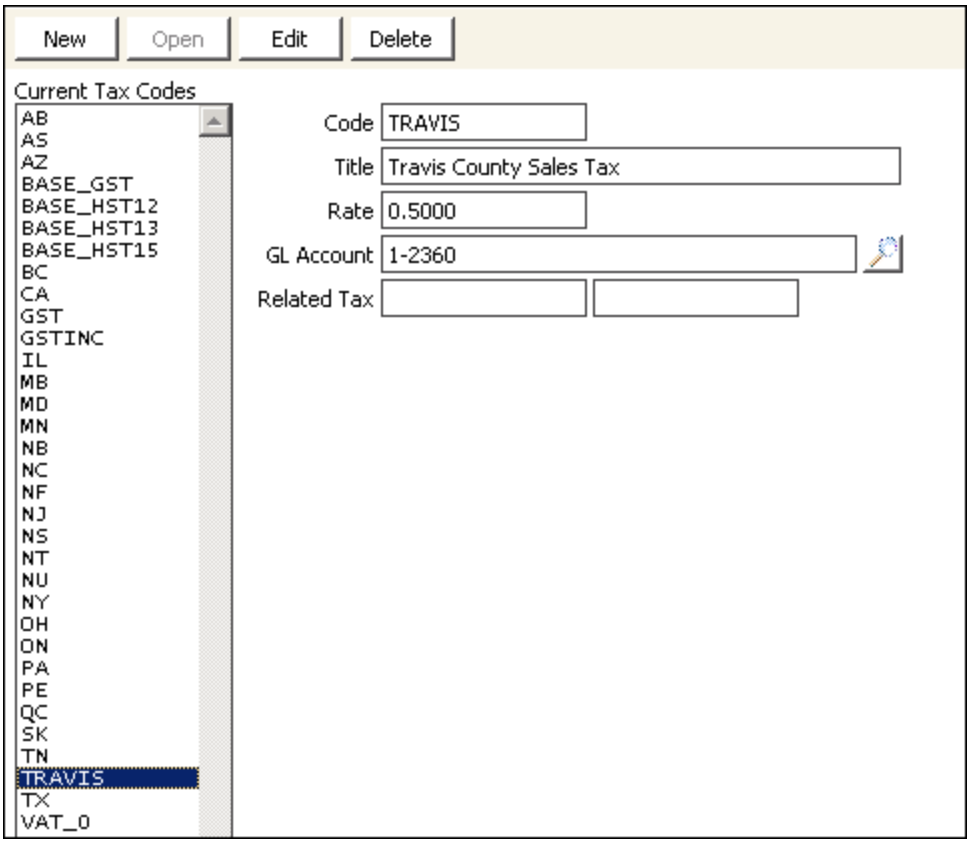
Set up tax codes

You must define the appropriate tax codes before you can enter orders with applicable sales taxes. The Tax Codes window is used for defining tax codes.

To define tax codes

1. From Set up tax codes window, click New.
2. Enter a Code for the tax.
3. Enter a Title for the tax code.
4. Enter the percentage Rate you are assigning to the tax code.
5. (optional) Enter the GL Account number.
6. (optional) Enter any applicable Related Tax.
7. Click Save.

Set up tax codes window



Admin Console: Configure > Commerce > Set up tables > Set up tax codes
Desktop: Orders > Set up tables > Tax codes

Current Tax Codes

Lists defined tax codes.

Code

Enter a code for the tax.

When defining state or province tax codes, use the standard two-character postal abbreviation for the state or province. This allows the Tax Auth field on the Enter and edit orders window to default to the customer's state tax code.

Title

Enter a title for the tax code.

Rate

Enter the percentage rate assigned to the tax code. Make sure to enter the rate as a percentage and not as a decimal. For example, enter 6.0 and not .06 for a tax rate of 6%.

GL Account

Enter the general ledger account number assigned to the tax code, or use the lookup icon to select a value.

If you leave the G/L Account field blank, iMIS records the value entered in the Sales Tax field on the AR/Cash Default Accounts window (go to Accounting > Options > Configure accounting options, and click Default Accounts).

Related Tax

These two fields allow you to enter multiple tax codes. Enter the codes for any other taxes you want to relate to the tax defined in the Code field.

Set up freight by weight

When calculating freight charges by weight, an order's shipping method, shipping postal code, and weight are factors in calculating freight charges.

Before an order's freight charges can be calculated by weight automatically, you must perform the following actions:

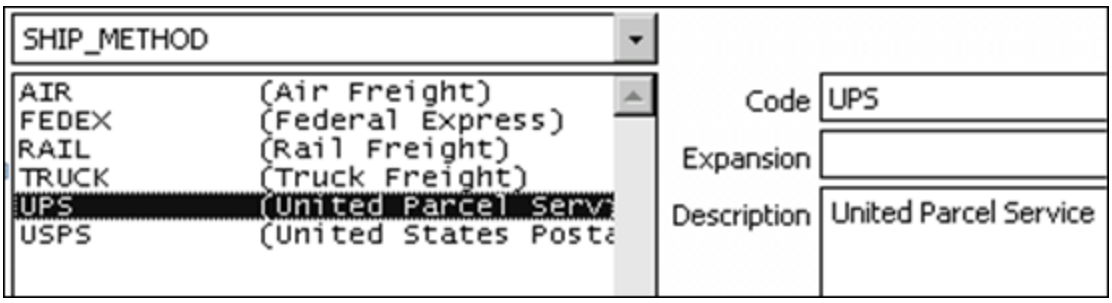
- Define shipping methods
- Define shipping zones
- Define weight tables
- Enable the Automatic Calculation of Freight Charge option
- Enable the Freight by Weight option

Note: The only shipping calculation supported in the iMIS Public View is Freight by Weight.

Defining shipping methods

You can define shipping methods for any form of transport or for any specific carrier that you use to ship your orders. Examples of shipping methods include Truck Freight, Air Freight, and Rail Freight as well as conventional carriers such as UPS, FEDEX, and USPS.

To define shipping methods, you first must create the SHIP_METHOD general look-up/validation table (go to Configure > Membership > Set up tables > Set up look-up/validation tables). After creating the SHIP_METHOD table, you can create shipping zone and freight tables.



Example of the SHIP_METHOD general lookup/validation table

Defining weight tables

After defining your shipping zone tables, you can define weight tables on the Set up freight by weight window for your user-defined shipping zones. Weight tables allow you to calculate shipping rates for individual shipping methods, and rates are calculated according to an order's shipping weight and shipping zone. When defining rates, high value determines the weight break for each rate.

After defining your weight tables, make sure you enable the Automatic Calculation of Freight Charge and Freight by Weight options on the Add-on Charges window (go to Configure > Commerce > Configure commerce options, and click Add-on Charges). When you enable these options, freight charges are automatically calculated by order weight when you enter an order.

Remember that you always can override automatic freight charges on the Order Details tab of the Enter and edit orders window if necessary.

To define weight tables

1. From Set up freight by weight window:

- Click New to create a new weight table.
- Select an existing Shipping Method and click Edit to modify the table.
- Select an existing Shipping Method and click Delete to remove the table.

2. Specify the weight table information:

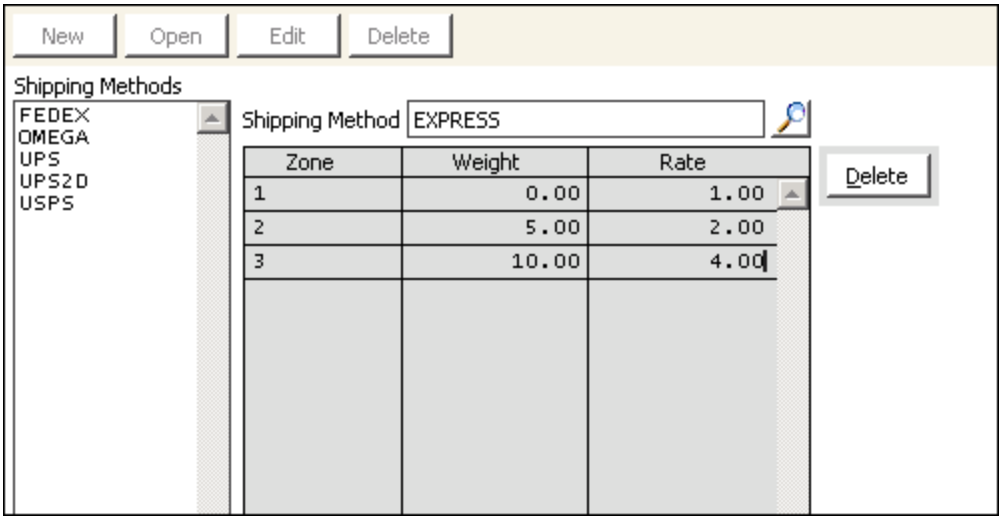
- To create new rows in the table for zone-weight-rate sets, position your cursor in the Rate cell of the last row in the table and press Tab.
- To delete rows from the table, position your cursor in the Rate cell of the row to be deleted and click Delete at the right of the table.

  Be sure to define at least one entry for every zone designator that is used in the various shipping zone tables that use this shipping method. (These designators are used in the Default Zone and Table fields of the Zones window.)

  For example, assume you have defined a UPS zone table and a UPS-USA zone table, and you have used zone designators A, 1, 2, and 3 in those two UPS-based zone tables. In this example, you would define weight-rate sets for those four zone designators.

3. Click Save.

Set up freight by weight window



Admin Console: Configure > Commerce > Set up tables > Set up freight by weight
Desktop: Orders > Setup tables > Freight by Weight

Shipping Methods

Displays the shipping methods for which you have defined weight tables.

Shipping Method

Enter the shipping method for which you are defining a weight table. Select the Find icon to look up a shipping method.

Shipping methods are defined on the SHIP_METHOD general lookup/validation table (go to Configure > Membership > Set up tables > Set up lookup/validation tables).

Zone

Enter the designation for a shipping zone. The zone designation follows the postal code as defined in the Default Zone field and the Table list on the Set up shipping zones window (go to Configure > Commerce > Set up tables > Set up shipping zones).

Weight

Enter the weight break for a shipping zone, which is the maximum weight.

For example, in the previous image of the Set up freight by weight window, any weight greater than 1.00 and less than or equal to 1.50 will be charged $2.50 for Zone 1. Any weight greater than 1.50 and less than or equal to 2.00 will be charged $2.75 for Zone 1.

Rate

Enter the freight rate for orders of the defined weight that are shipping to the specified zone.

Set up freight by total value

When calculating freight charges by total value, iMIS uses an order's total pre-tax value excluding handling and restocking charges. To calculate freight charges by total order value, you must define freight rates for ranges of order values. Value ranges are defined on the Set up freight by total value window.

Before freight charges by total order value can be automatically calculated, you must perform the following actions:

- Set up value range tables
- Enable the Automatic Calculation of Freight Charge option
- Enable the Freight by Total Value Ordered option

To define a single value range

1. Enter the low value in the Total Value Range field. Low values must be greater than $0.00. $0.00 cannot be the beginning range.
2. Enter the Rate for the order value range.
3. Enter the low value of the succeeding range in the Total Value Range field.

For example, define rates for the following three order value ranges:

- Orders with a value greater than $0.00 and less than $10.00 will cost $2.50 to ship.
- Orders valued between $10.00 and less than $25.00 will cost $5.00 to ship.
- Orders valued above $25.00 will cost $7.50 to ship.

To set up value ranges for required rates

1. Define the first value range:

- Enter 0.01 in the Total Value Range field for the first range's low value.
- Enter 2.50 for the Rate of the first range.
- Press Tab.

2. Define the second value range:

- Enter 10.00 in the Total Value Range field for the second range's low value. By entering 10 for the second range's low value, the first range's high value will equal 9.99 when the entire table is completed and saved.

- Enter 5.00 for the Rate of the second range.
- Press Tab.

3. Define the third value range:

- Enter 25.00 in the Total Value Range field for the third range's low value. By entering 25.00 for the third range's low value, the second range's high value will equal 24.99 when the entire table is completed and saved.
- Enter 7.50 for the Rate of the third range.

4. Click Save. The Total Value Range field will calculate and display the low and high values for each range.

To define a value range

1. From Set up freight by total value window, click Edit.
2. Enter the first range's low value in the Total Value Range field. Low values must be greater than $0.00. $0.00 cannot be the beginning range.
3. Enter a Rate for the first value range, and press Tab.
4. Enter a value in the Total Value Range field. The value entered determines the following:

- The high value of the preceding range.
- The low value of the current range you are defining.

5. (optional) Repeat this process for each additional value range you are defining.
6. Click Save.

To add a value range

When adding value ranges, you can add additional, expanded ranges as well as ranges that fall between other ranges.

1. From Set up freight by total value window, click Edit.

2. Place your cursor on the Rate of the last value range, and press Tab to display a new line (0.00).
3. Define the new range:

- Enter the new range's low value in the Total Value Range field.
- Enter a Rate for the new range.

4. Click Save. When you save the new range, it will be inserted in the table, and the high value will be calculated.

To edit or delete a value range

1. From Set up freight by total value window, click Edit.
2. Select the total value range you want to edit. You only can edit the low value of a range and the Rate. To delete a total value range:

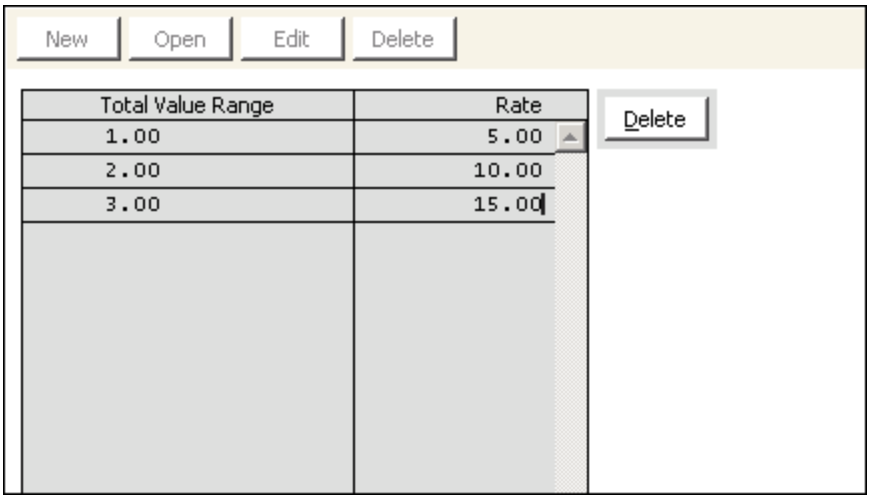
- Select the row of the range you want to delete.
- Click the Delete button to the right of the table.

3. Click Save. The ranges are recalculated.

Calculating order values that fall outside defined ranges

If an order's pre-tax value exceeds the highest defined value range, the order's freight charges will be calculated at the rate defined for the highest value range. If an order's pre-tax value is below the lowest defined value range, no freight charges will be calculated, and no freight will be charged.

Set up freight by total value window



Admin Console: Configure > Commerce > Set up tables > Set up freight by total value
Desktop: Orders > Set up tables > Freight by total value

Total Value Range

Enter the low value of a range. Each range's high value is determined by each succeeding range's low value; a range's high value equals the low value of the succeeding range minus .01.

Rate

Enter a freight rate for a value range.

Defining value ranges

Freight rates can be defined for any range of order values, and no limit exists to the number of value ranges and rates that can be defined. When defining a rate's value range, only the low value of the range is entered in the Total Value Range field. The high value of the range is not entered. It is calculated upon completing and saving the table.

When defining a value range's low value, the low value must be greater than $0.00, such as $0.01; $0.00 cannot be the beginning range. In addition, if your beginning range's lowest value is $5.00 for example, then freight will not be calculated for any orders valued less than $5.00.

Each range's high value is determined by each succeeding range's low value; a range's high value equals the low value of the succeeding range minus .01.

Set up freight by total quantity

When calculating freight charges by quantity, the total product quantity ordered determines an order's freight charges. To calculate freight rates by order quantity, you must define rates for ranges of product quantities. Quantity ranges are defined on the Set up freight by total quantity window.

Before freight charges can be automatically calculated by order quantity, you must perform the following actions:

- Set up quantity range tables
- Enable the Automatic Calculation of Freight Charge option
- Enable the Freight by Total Quantity Ordered option

To define a quantity range

1. From Set up freight by total quantity window, click Edit.
2. Enter the first range's minimum quantity in the Total Quantity Range field. Minimum quantities must be greater than 0.00 (0.00 cannot be the beginning range).
3. Enter a Rate for the first quantity range, and press Tab.
4. Enter a quantity in the Total Quantity Range field. The quantity entered determines the following:
   - The maximum quantity of the preceding range
   - The minimum quantity of the current range you are defining
5. (optional) Repeat this process for each additional quantity range you are defining.
6. Click Save.

To add a quantity range

When adding quantity ranges, you can add additional, expanded ranges as well as ranges that fall between other ranges.

1. From Set up freight by total quantity window, click Edit.
2. Place your cursor on the Rate of the last quantity range, and press Tab to display a new line (0.00).
3. Define the new range:

- Enter the new range's low value in the Total Quantity Range field.
- Enter a Rate for the new range.

4. Click Save. The new range is inserted in the table, and the high value is calculated.

To edit or delete a quantity range

1. From Set up freight by total quantity window, click Edit.
2. Select the total quantity range you want to edit. You only can edit the low value of a range and the Rate. To delete a total quantity range:

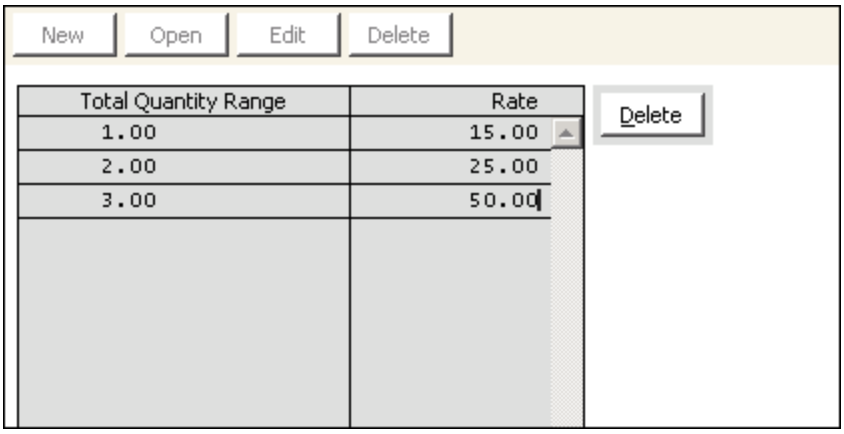
- Select the row of the range you want to delete.
- Click the Delete button to the right of the table.

3. Click Save. The ranges are recalculated.

Calculating freight charges that fall outside defined ranges

If an order's product quantity exceeds the maximum defined quantity, the order's freight charges will be calculated at the rate defined for the maximum quantity. If an order's product quantity is less than the minimum defined quantity, no freight charges will be calculated, and no freight will be charged.

Set up freight by total quantity window



Admin Console: Configure > Commerce > Set up tables > Set up freight by total quantity
Desktop: Orders > Set up tables > Freight by total quantity

Total Quantity Range

Enter the minimum quantity of a range. Each range's maximum quantity is determined by each succeeding range's minimum quantity. A range's maximum quantity equals the minimum quantity of the succeeding range minus .01.

Rate

Enter a freight rate for a quantity range.

Defining quantity ranges

Freight rates can be defined for any range of product quantities, and no limit exists to the number of quantity ranges and rates that can be defined. When defining a rate's quantity range, only the minimum quantity of the range is entered in the Total Quantity Range field. The maximum quantity of the range is not entered; it is calculated upon completing and saving the table.

When defining a quantity range's minimum quantity, the minimum quantity must be greater than 0.00, such as 0.01 (0.00 cannot be the beginning range). In addition, if your beginning range's minimum quantity is 5.00 for example, then freight will not be calculated for any orders for quantities of less than 5.00.

Each range's maximum quantity is determined by each succeeding range's minimum quantity; a range's maximum quantity equals the minimum quantity of the succeeding range minus .01

The Total Quantity Range field will populate with the maximum quantity for each range.

Set up shipping zones

After creating the SHIP_METHOD general lookup/validation table and defining your shipping methods, you can set up your shipping zone tables. Zone tables are based upon shipping method, country (if applicable), and zip or postal codes. You can set up zone tables both for multiple shipping methods and for countries that use these shipping methods.

To define a default zone table for a shipping method, do not designate a country for a shipping method when setting up shipping zones. Orders that do not list a country will use the default zone table for a given shipping method.

Shipping zones are defined according to postal code. Depending on your organization's needs, you can define single postal codes as shipping zones or divide groups of postal codes into shipping zones.

Shipping zones use the first three characters of a postal code, and the table format for defining zones is XXX,Z where XXX represents the first three characters of a postal code, and Z represents the zone designation defined by the user. You also can enter a postal code in the format XXX-XXX,Z where XXX represents the first three characters of the beginning postal code, XXX represents the first three characters of the ending postal code, and Z represents the zone designation. These zone designations are used when setting up weight tables on the Set up freight by weight window.

For example, if you define a shipping zone for a single postal code, such as 75208, you would enter 752 followed by a comma. You then would enter either a numeric or alphabetic value for the zone designation, such as a 1. The shipping zone would display as 752,1. A shipping zone defined for a group of postal codes could be entered as 900-999,2.

As long as you follow the correct table format, you can define as many zone codes as necessary. You must define shipping zone tables before defining freight tables.

To define shipping zone tables

1. From Set up shipping zones window:

- Click New to create a new zone table.
- Select an existing Zone Table and click Edit to modify the table.
- Select an existing Zone Table and click Delete to remove the table.

2. Specify the shipping zone information.
3. Click Save.

Verifying shipping zones for orders

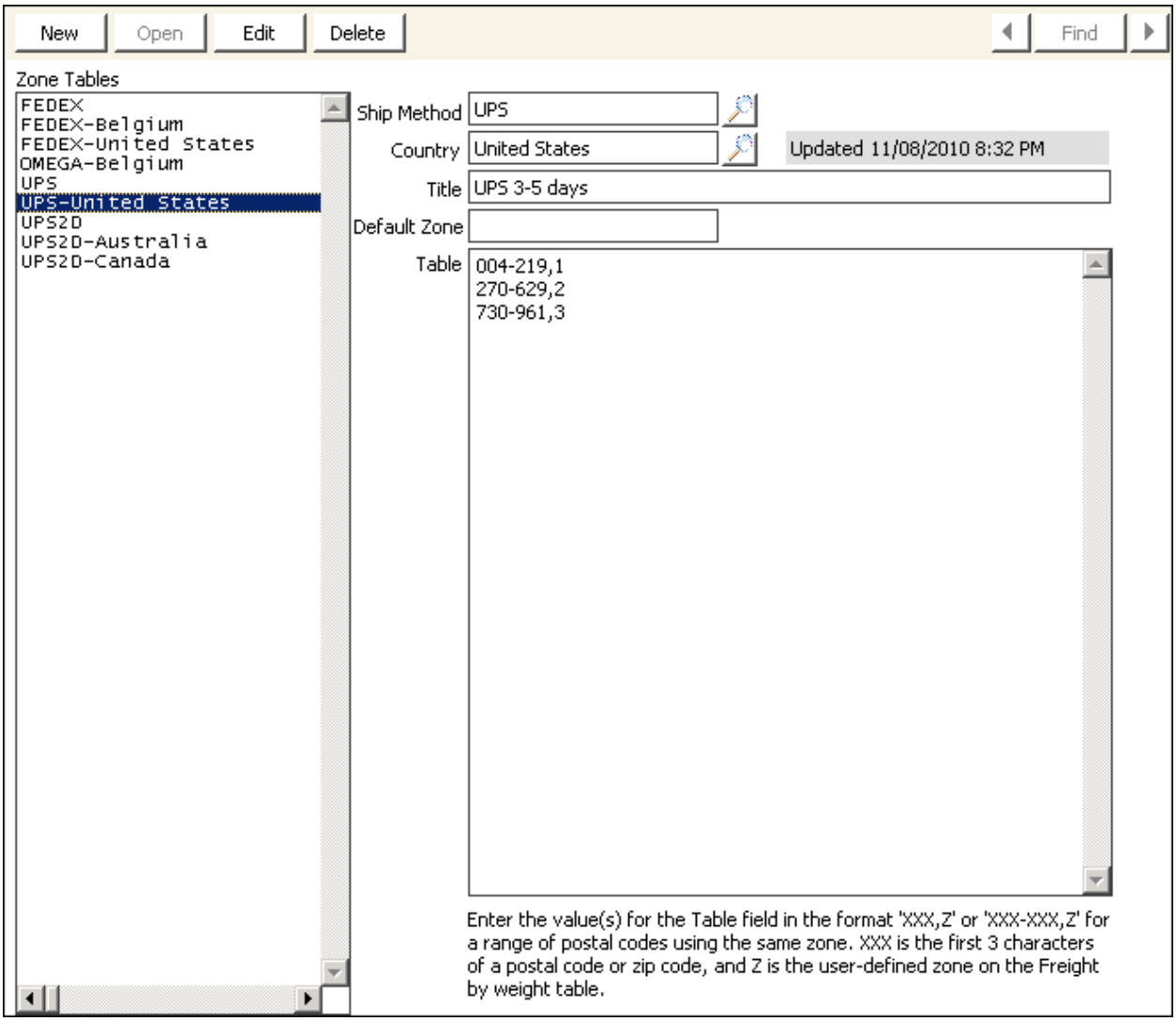
When entering orders, the following rules determine which zone table is used:

- A country is defined for the Ship to address – The zone table used is the one for which the Ship Method and Country combination matches an order's Ship to address Country and Shipping Method.
- A country is not defined for the Ship to address – The zone table used is the one for which the Ship Method matches an order's Shipping Method. The zone table has a blank Country field.

After the correct zone table has been determined, the following rules determine whether the Default Zone defined in that zone table is used:

- The Ship to address:
- Does not specify a postal code, or
- Specifies a postal code that does not match any of the entries in the Table list for the zone table.
- The Ship to address of an order specifies a postal code, but the Table list for the zone table does not contain any entries.

Set up shipping zones window



Admin Console: Configure > Commerce > Set up tables > Set up shipping zones
Desktop: Orders > Set up tables > Zones

Zone Tables

Lists the defined shipping zone tables. Zone table names are concatenations of the Ship Method and Country fields.

Ship Method

Specifies the shipping method for the selected zone table. Select the lookup icon to look up a shipping method. Shipping methods are defined on the SHIP_METHOD general

lookup/validation table (go to Configure > Membership > Set up tables > Set up look-up/validation tables).

Country

(optional) Specifies the country for the selected zone table. Select the lookup icon to look up a country. Countries are defined on the Set up country names window (go to Configure > Membership > Set up tables > Set up country names).

If you are updating an existing zone table and the Country field is not populated, you can enter a country for the zone table. However, once the Country field is populated and saved, it no longer can be edited.

To define a default zone table for a shipping method, leave the Country field blank. Default zone tables are used for orders that do not list a country.

Updated

(read only) Displays the last date and time that the selected zone table was modified.

Title

Specifies a descriptive title for the selected zone table.

Default Zone

(optional) Specifies the default shipping zone designation for the selected zone table, which must have a matching value in the Zone field of the Set up freight by weight window.

This default zone is used only when an order's Ship to address specifies a country for which a zone table exists and when any of the following conditions exists:

- The Ship to address:
- Does not specify a postal code.
- Specifies a postal code that does not match any of the entries in the Table list for the zone table.

- The Ship to address of an order specifies a postal code, but the Table list for the zone table does not contain any entries.

  For example, if a UPS zone table and a UPS-USA zone table both exist, the UPS zone table is used if an order does not specify a country name in the Ship to address. However, if USA is specified in the order's Ship to address, the UPS-USA zone table is used instead. If the Ship to address in this second case does not specify a postal code, or it specifies a postal code that isn't listed in the UPS-USA zone table, then the specified Default Zone designation would be used to determine the appropriate freight charges by looking for a matching value from Zone field of the Set up freight by weight window.

  Table

  Specifies the shipping zones for the table. The table format for defining zones is XXX,Z or XXX-XXX,Z where XXX is the first three characters of a postal code, and Z is a shipping zone designation specified in the Zone field of the Freight by weight table.

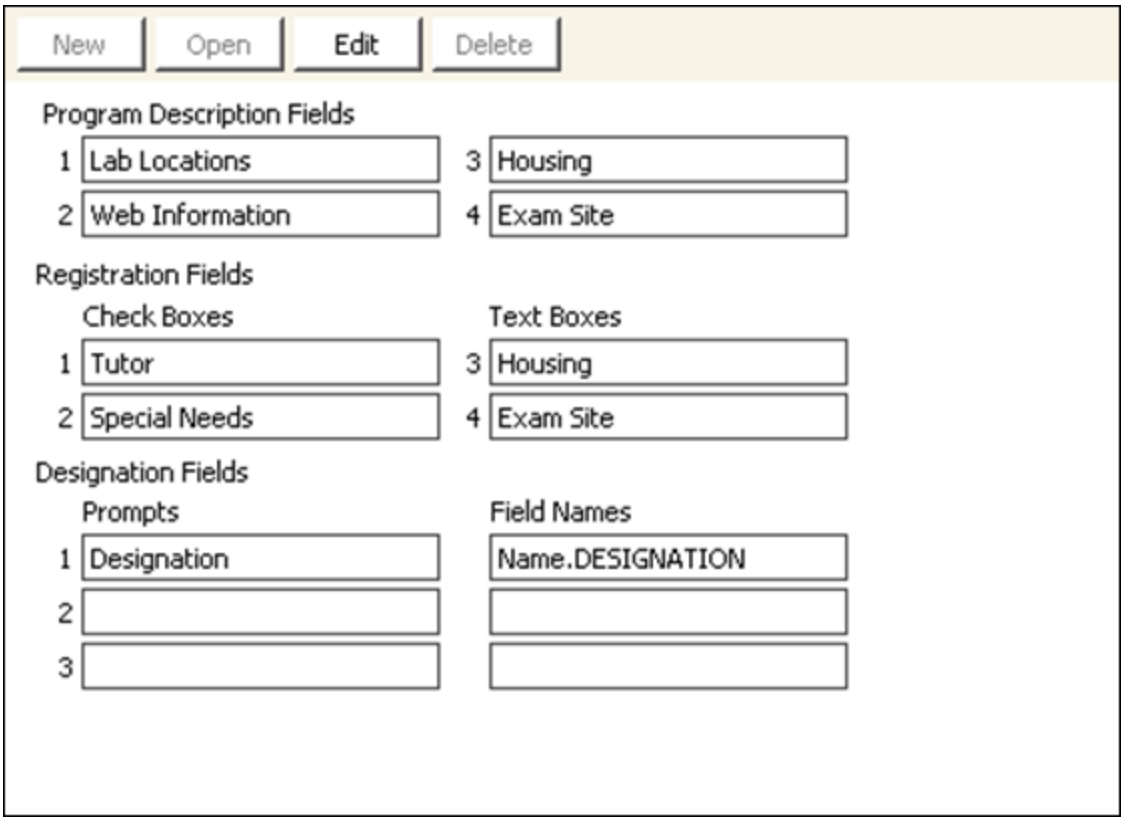
  Table format

  (read only) Displays the correct format for defining shipping zones in the Table list.

Certification

Configure certification options

iMIS gives you a significant amount of flexibility to design certification programs. Several setup windows assist you in tailoring the system to your organization's needs.



Admin Console: Configure > Certification > Configure certification options
Desktop: Certification > Set up module

Program Description Fields

In this area of the window, activate up to four user-defined, program-related fields. Assign purposes and labels to any of these fields according to your needs. If you define a user prompt in one of the Program Description Fields, the field is shown on the Program Description window.

Registration Fields

In this area of the window, activate up to four user-defined, registration-related fields. You can create two checkboxes and two text fields. If you define a user prompt in one of the Registration Fields, the field is shown on the Registration Description window.

Designation Fields

In this area of the window, activate up to three fields to display on the Register a student by program window and on the Register a student by component window. These fields will be used to define the specific designations to be awarded for program completion.

In addition, you can specify the field to be updated in the customer's record when the program is complete, for example, Name.DESIGNATION. After the completion test is performed and the program is marked complete, iMIS automatically inserts or appends the new designation in the customer's record.

Note: If a field is set as a user-defined field on a table that is not Always Create, and does not have a record for the registered member, the designation is not updated when the program is closed.

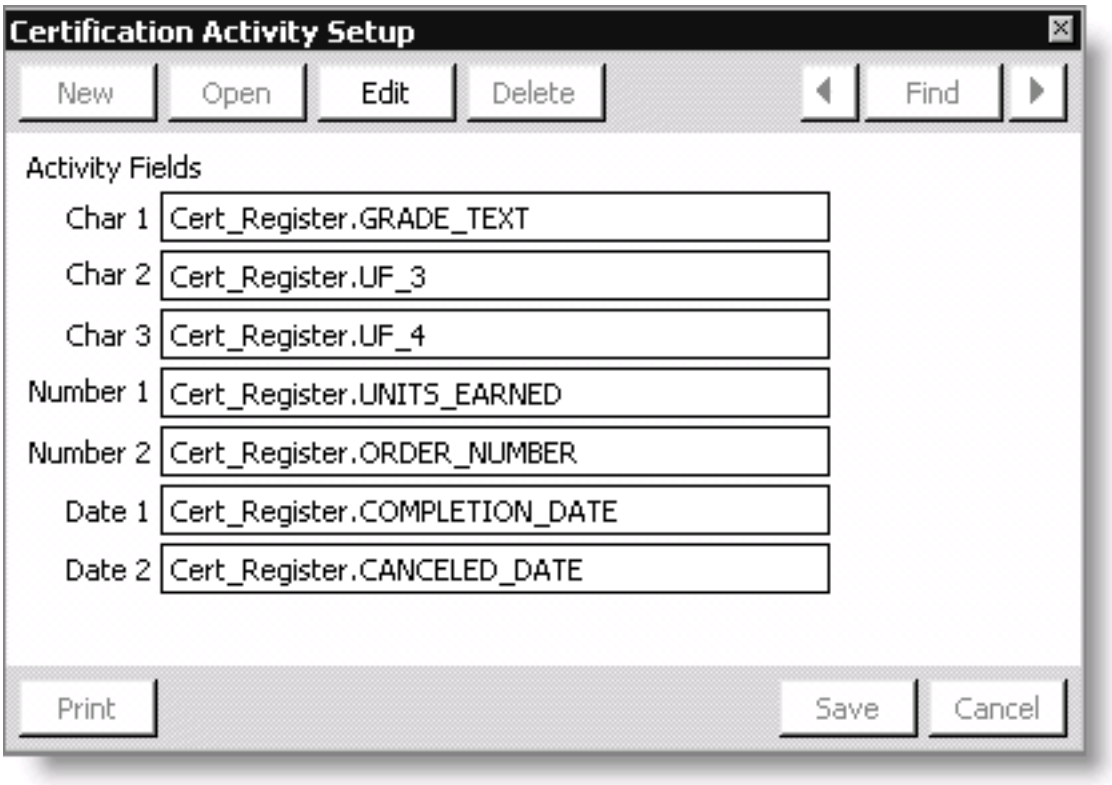
Activity

Opens the Certification Activity Setup window where you can map additional user-specified fields to certification activity records, and specify up to seven additional certification-related data fields (three character fields, two numeric fields, and two date fields) to add to the certification-generated activity fields.

To define Activity fields

1. From the Certification Activity Setup window, click Edit.
2. Enter the activity information you want to maintain in the Activity Fields.
3. Click Save.
4. Restart iMIS.

Certification Activity Setup window



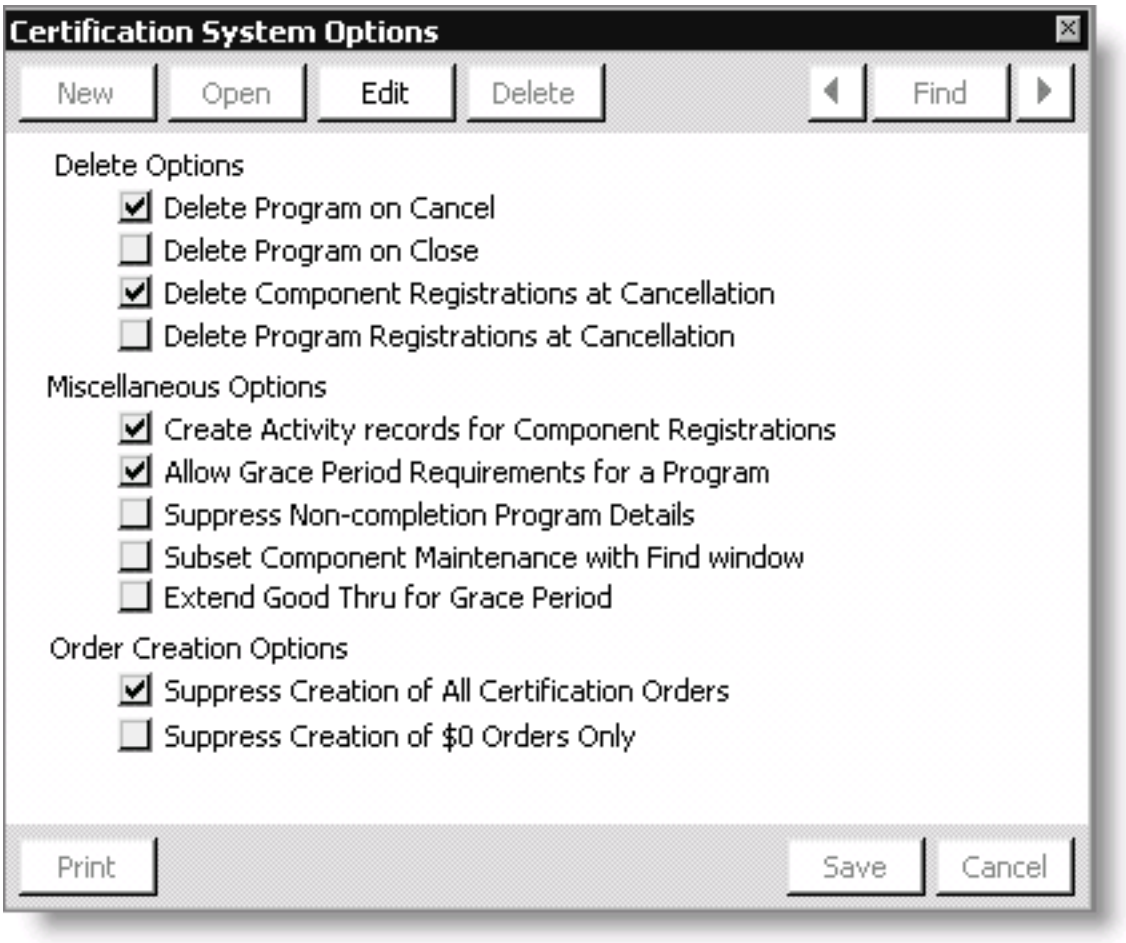
Options

Opens the Certification Systems Options window where you can set the global Certification module system options.

To define Certification options

1. From Certification System Options window, click Edit.
2. Select the appropriate Delete Options.
3. Select the appropriate Miscellaneous Options.
4. Select the appropriate Order Creation Options.
5. Click Save.

Certification System Options window



Delete Options

- Delete Program on Cancel – If you select this checkbox and cancel a certification program, the program is no longer available on the Set up programs window. If you clear this checkbox and cancel a program, the program will be available on the Set up programs list and have a status of X for canceled.
- Delete Program on Close – If you are processing registrations for certification programs that will be closed eventually, this checkbox determines whether iMIS should maintain the summary detail when you close the program or completely delete all program records. If you select this checkbox and cancel a program, the program is no longer available on the Set up programs window. If you clear this checkbox, the program will be available on the Set up programs list and have a status of C for closed.

- Delete Component Registrations at Cancellation – This checkbox determines how iMIS handles canceled certification component registrations. If this checkbox is selected, the component registration record is deleted when an individual cancels a component registration. If this checkbox is cleared, the component registration record remains and is assigned a status of X for canceled.
- Delete Program Registrations at Cancellation – This system checkbox determines how iMIS handles canceled certification program registrations. If this checkbox is selected, the program registration record is deleted when an individual cancels from a program. If this checkbox is cleared, the program registration record remains and is assigned a status of X for canceled.

  Note: If you close a program, the program is assigned a status of C. In addition, if you enable the Delete Program on Close checkbox on the Certification System Options window, the program setup is purged and the program no longer is available to be cloned from the Set up programs window. However, program and component registration records are retained until they are purged manually.

  If you cancel a program, the program is assigned a status of X. In addition, if you enable the Delete Program on Cancel checkbox on the Certification System Options window, the program setup is purged and the program no longer is available to be cloned from the Set up programs window. However, program and component registration records are retained until they are purged manually.

  Miscellaneous Options

- Create Activity records for Component Registrations – If this checkbox is selected, activity records for component registrations are created when registration records are purged. See Purging Certification Registration Records. If it is cleared, the activity is not created.
- Allow Grace Period Requirements for a Program – This checkbox allows you to add a grace period requirement for students who do not meet the maintenance requirements of a program. For example, if participants must complete the program requirements within three years, but they do not fulfill the requirements during that time, they may be able to get a deadline extension for an additional fee. The extension is a Grace Period and the

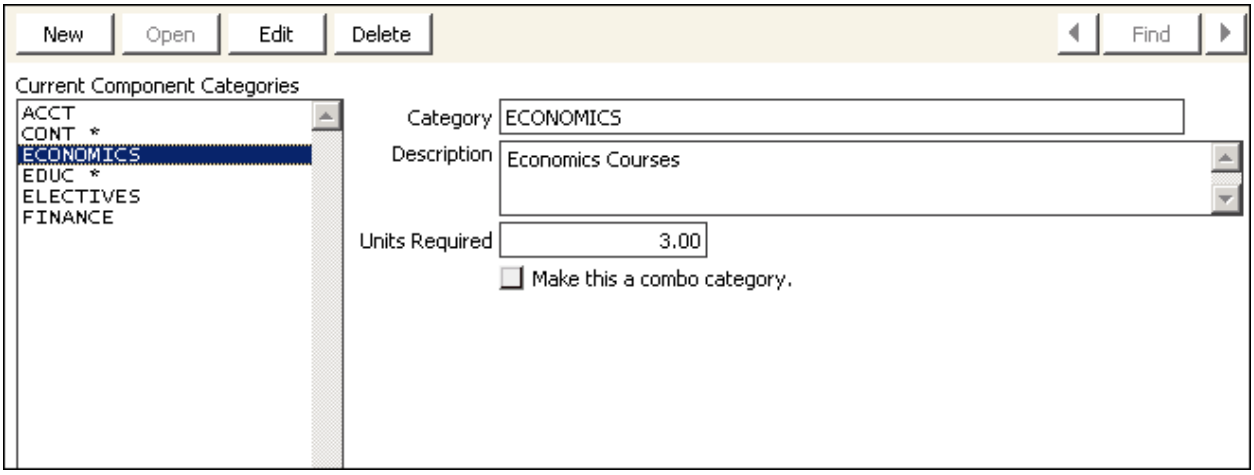
fee is a Grace Period requirement. For detailed instructions, see To create grace period requirements for a program.

- Suppress Non-completion Program Details – If you select this checkbox, details about a program are suppressed on the Program Requirements window of a registration. You can view only the high-level requirements and cannot expand the detail. This window displays the program's category and component requirements, indicating in which category or component the student is enrolled, or which ones the student has completed. This has no effect on the Program Requirements window under Program Maintenance.
- Subset Component Maintenance with Find window – Activates the Component Find window each time you open the Set up components window. This allows you to look up components for maintenance or registration by Component ID, Title, Category, Location, or by an Ad hoc Search.
- Extend Good Thru for Grace Period – This checkbox works hand-in-hand with the Allow Grace Period Requirements for a Program checkbox. When a student is allowed to extend the deadline into a grace period, the Good Thru date remains unless you select this checkbox. If you do, the Good Thru date is extended, along with the Deadline Date.

Order Creation Options

- Suppress Creation of All Certification Orders – To handle accounting transactions created by fees processed as part of a certification program, iMIS uses order processing to create orders and to capture these payments. This checkbox turns off all order creation for component registrations.
- Suppress Creation of Orders with zero amount – Similar to the Suppress Creation of All Certification Orders, this checkbox turns off order creation for component registrations that do not have a cost associated with them.

Set up component categories



Admin Console: Configure > Certification > Set up tables > Set up component categories
Desktop: Certification > Set up tables > Component categories

Current Component Categories

Lists the current categories.

Category

Specifies the category code.

Description

Specifies a brief description of the category.

Units Required

Specifies the total component units required to satisfy the category, for example, nine units from components worth three units each. You must enter a value in this field.

Note: If you do not populate the Units Required field, iMIS considers the category complete upon the first occurrence of a registration for a component within that category.

Make this a combo category

Select this option to specify that this is a combo category. A combo category includes a combination of two or more categories.When you select this option, an additional field is shown so you can add the other categories associated with the combo category.

Combo category field

Lists available categories for the selected combo category. This field is shown when you select the Make this a combo category option.

Print

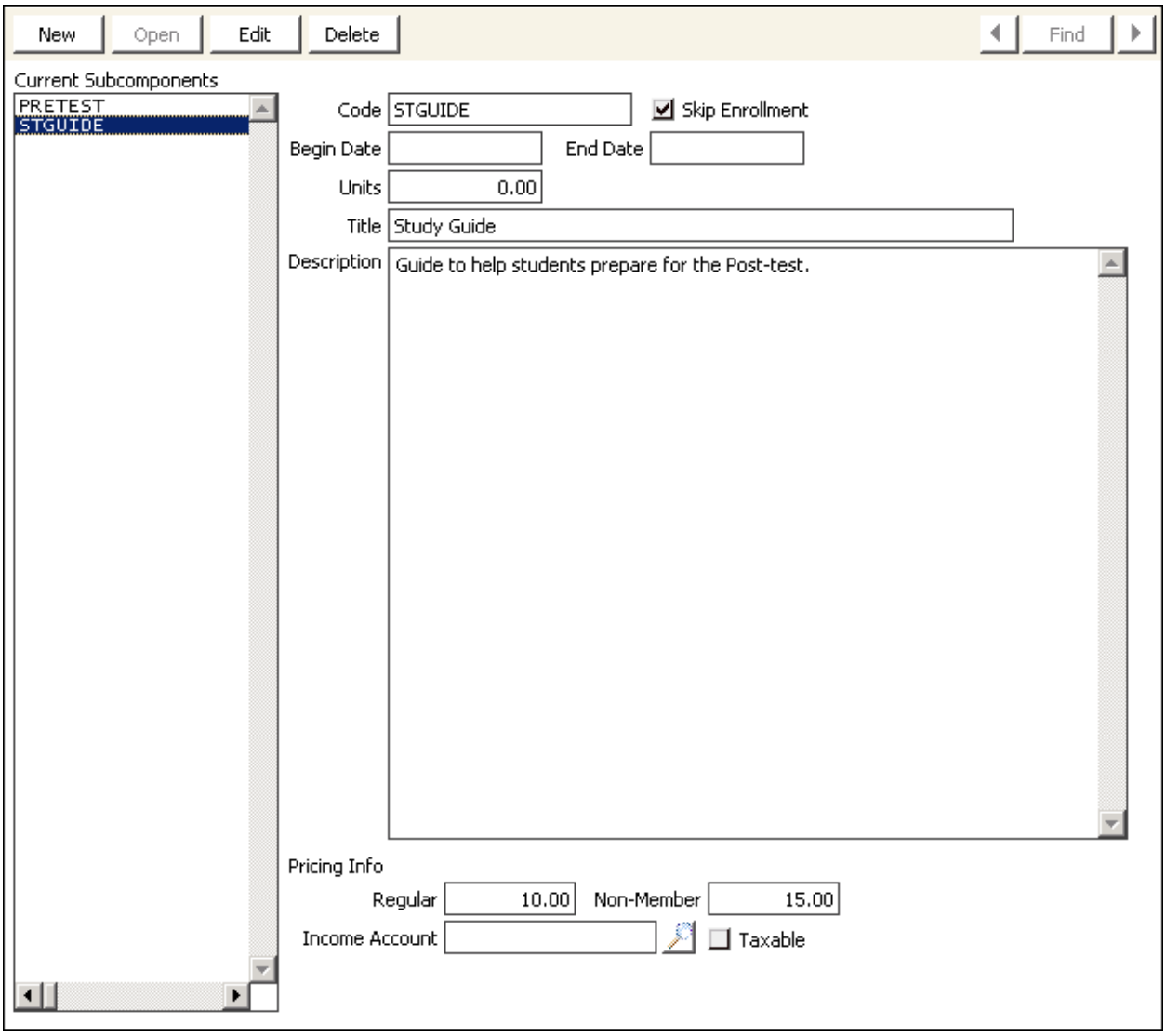
Lets you generate and print a Category Description report for the selected Component Category.

Set up subcomponents

To create a subcomponent

1. From Set up subcomponents window, click New.
2. Enter the subcomponent Code.
3. Enter the Begin Date and the End Date for this subcomponent, if applicable.
4. Enter the number of Units.
5. Enter the title of the subcomponent in the Title field.
6. (optional) Enter a description of the subcomponent in the Description field.
7. (optional) Enter pricing information associated with the subcomponent in the Regular and Non-Member fields.
8. (optional) Enter the income account associated with the subcomponent in the Income Account field.
9. Click Save.

Set up subcomponents window



Admin Console: Configure > Certification > Set up tables > Set up subcomponents
Desktop: Certification > Set up tables > Subcomponents

Current Subcomponents

List of current subcomponents.

Code

(required) Specifies the primary abbreviation or identification code to represent this sub-component.

Skip Enrollment

Select this option to specify subcomponents that do not require the student's attendance, such as fees or an application. If you enable this option, the subcomponent's status is set immediately to Passed when the student registers for the subcomponent.

Begin Date, End Date

(optional) Use these fields to specify the begin and end date for a subcomponent. For example, a two-day study session beginning on Monday would have Monday's date in the Begin Date field and Tuesday's date in the End Date field.

Units

(optional) Specifies the number of units a customer receives for completing the subcomponent.

Title

Specifies a short descriptive title for this subcomponent, which is displayed on the Program Details window and the Student Transcription report.

Description

(optional) Specifies a lengthy note, description, or comment related to the subcomponent. You can enlarge this scrolling text field by pressing Ctrl+Z.

Pricing Info

In the Pricing Info area of the window, specify the cost of a subcomponent for members and non-members, and a G/L account number. When you register a student for a subcomponent with fees, an order is created. The transaction flows down to the iMIS G/L interface.

Regular

Specifies the default unit price (or member price) to be applied automatically when a student enrolls in the subcomponent. You can override this default price when you enter a subcomponent.

Non-Member

Specifies the non-member price. This price applies automatically when anyone with non-member status enrolls in the subcomponent. This option allows you to avoid most of the manual price overrides.

Income Account

Use this field to identify the General Ledger income account to credit when sales entries are made for this component. You can click the lookup icon to select an income account.

Note: You do not have to establish G/L accounts if you are not using the iMIS Financial (G/L) interface. If you leave this field blank, iMIS records this entry in the account you designated in the AR/Cash Default Accounts window.

Taxable

The Taxable checkbox is selected by default, indicating that the subcomponent is subject to sales tax. Click the checkbox to clear it, reversing the automatic taxation for the component.

Taxable (Canadian)

Note: Canadian taxation options are not applicable to the Certification module.

Print

Generates and prints a Component Description report for the selected subcomponent.

Clone

Opens the Component Code window to clone the selected subcomponent.

Options

Opens a drop-down list of subcomponent-specific options:

- Address – Select this option to open the Component Address window to enter an address for the selected subcomponent.

- Prerequisites – Select this option to open the Component Prerequisites window to enter prerequisites for the selected subcomponent.
- Instructors – Select this option to open the Component Instructors window to enter the names of instructors who teach the subcomponent.
- Statistics – Select this option to open the Component Statistics window where you can view the number of students registered for the selected subcomponent, the number who have passed, and the number who have failed.

Contacts

Finding contacts

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

Finding records in Contacts

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

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

The process for changing records always begins with Find.

To change contact records

1. Search for the contact in the Contacts tab.

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

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

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

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

3. Save the record.

   Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (Utilities > Reports and Queries > Table Maintenance > Run

UpdateFullName script). This script can be run by a system administrator from any iMIS Desktop.

To search for contacts by ID

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

To find a contact in the Directory tab

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

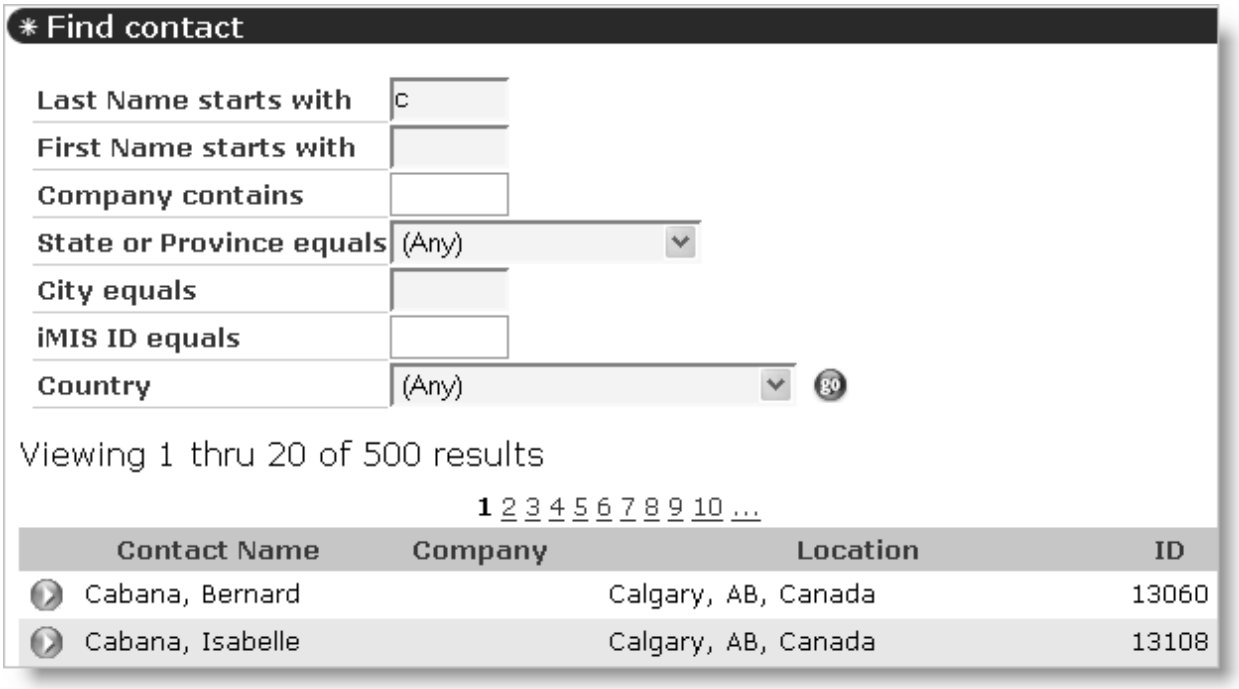
1. Select the Directory tab.
2. Enter search criteria for the contact in the Last Name starts with field or the other fields.

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

   The contact list displays below the search criteria.

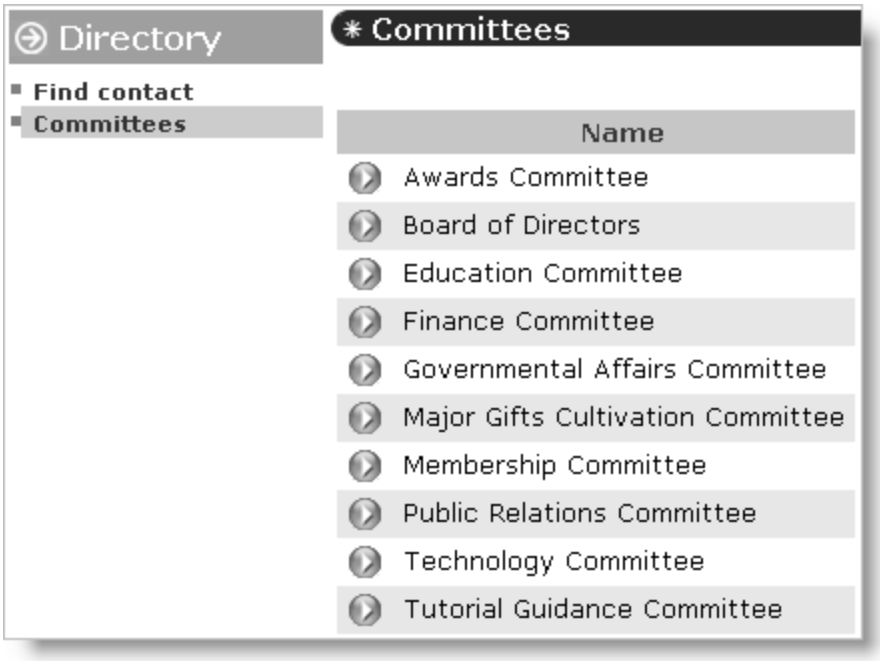
   Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (Utilities > Reports and Queries > Table Maintenance > Run UpdateFullName script). This script can be run by a sysadmin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

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



To find committee members in Directory

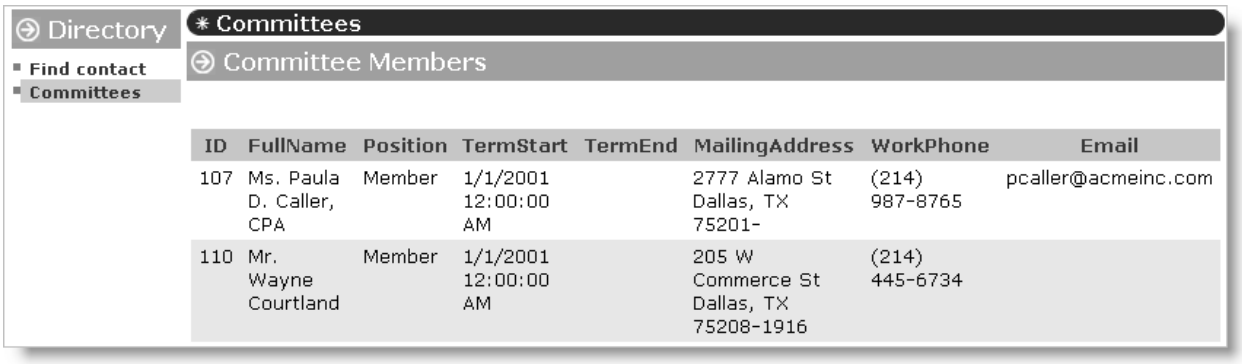
1. On your site, select Directory > Committees for a list of all of the committees.



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

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

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



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

Configuring contact creation and search options

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

To configure the new account experience

1. Several configuration options are available. This procedure lists some of the recent additions as well as typical configuration settings.
2. Go to System Setup > Set up customer web components > Create account search.

- Select User must select his or her company before creating an account to allow customers to search for company records.

- If you want to allow searches only among certain types of members, enter the codes for those member types in Search only among members of this type.

3. Go to System Setup > Set up web components > Organization configuration.

- Enter an email address in the E-mail address to notify when an account is updated field.
- Enter an email address for the Email From (CreateAccountEmailFrom) field to designate a particular email address to send the logon information to new accounts.

4. More configuration options are available and you can continue tailoring as you see fit.

   Tips

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

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

Creating an account

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

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

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

To create an account in Contacts

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

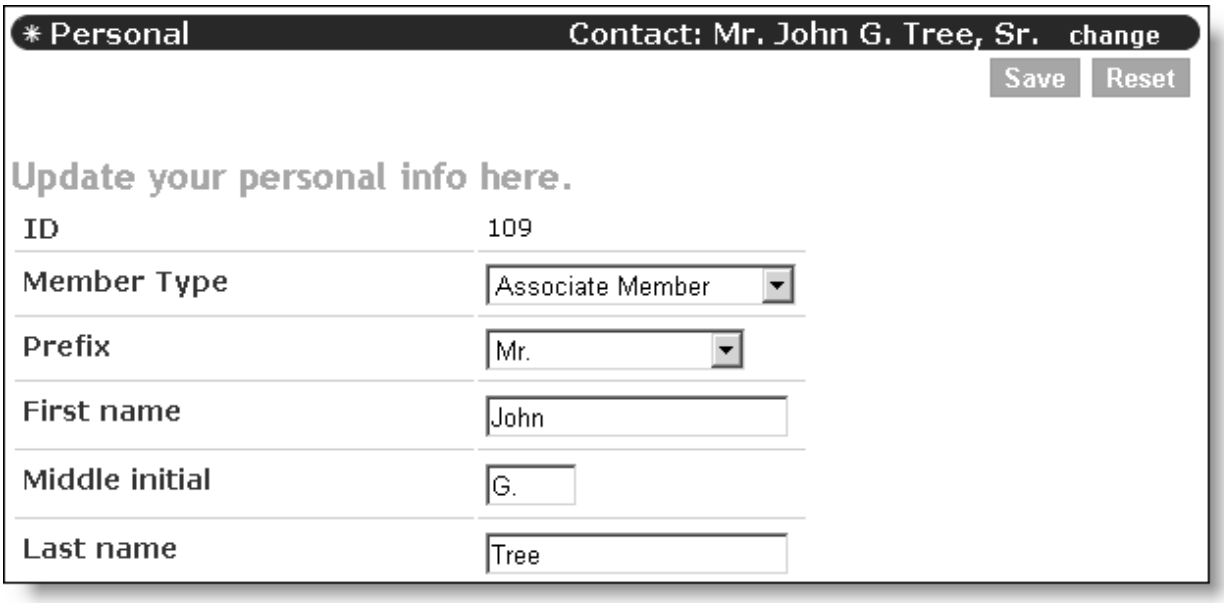
1. Log on to your site and click Contacts > Create account.
2. Enter all required information to look for an existing account.
3. Click Next.
4. Enter the account details or search for your organization name, depending on your iMIS configuration.

   Note: Your iMIS Administrator can select User must select his or her company before creating an account in the System Setup > Set up customer web components > Create account search page in order to require contacts to search for their organization before creating an account.
5. Click Next.
6. (optional) If iMIS finds a pre-existing account, you can verify or add additional contact information on the next page.
7. Click Save to save the contact record.

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

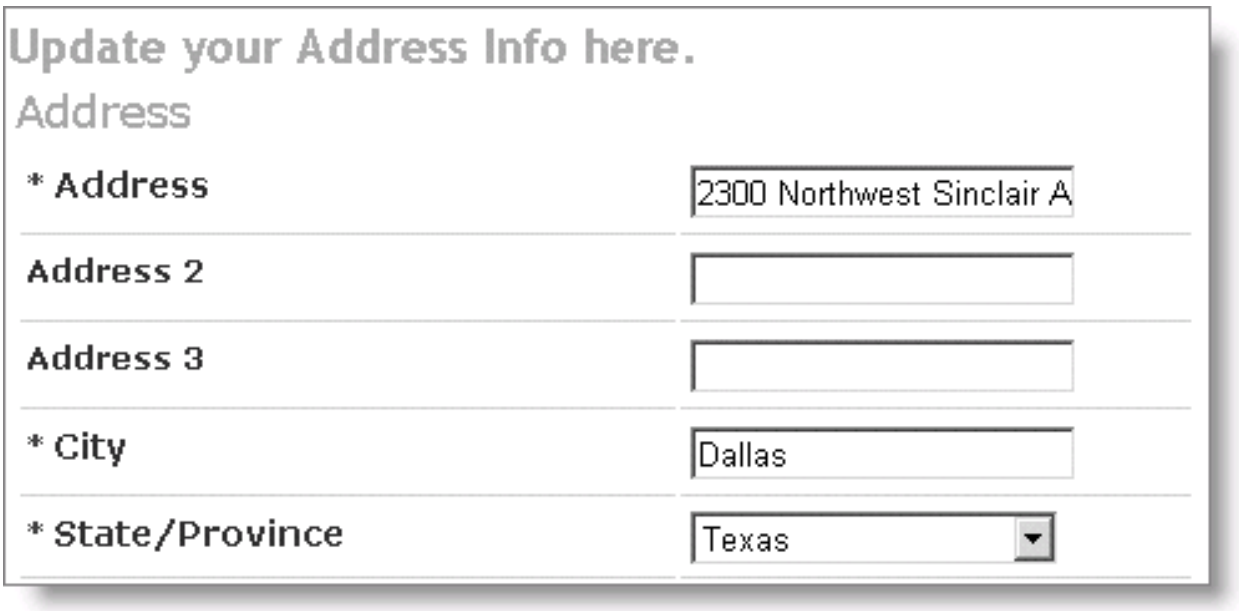
Personal information in Contacts

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



Address information in Contacts

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



Logon & password information in Contacts

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

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

Managing contacts

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

Note: The name of the current contact record appears under the tabs. If you do not see the contact name on the Contact management pages, you need to run the rebuild UpdateFullName script (Utilities > Reports and Queries > Table Maintenance > Run

UpdateFullName script). This script can be run by a system administrator from any iMIS Desktop.

To edit records in Contacts

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

   Note: An iMIS system administrator can modify query results to display by default using the Default query in /ContactManagement/DefaultSystem/Queries/FindContacts.
3. Click Filter.
4. Enter different or broader criteria if you do not see the contact in the search results.

   Tip: If you see fewer results than you expect, you may have a case-sensitive database; try different cases in your search (such as "Au" instead of "au").
5. When you are satisfied with the search results, select the contact from the list.
6. Once you have selected the contact, update their information as needed, clicking the links on the left to update different types of information.
7. Click Save when you are done.
8. You search for and view another contact record by clicking change to the right of the contact name.

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

   To manage company rosters

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

   Before you begin

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

To manage company rosters in the web-based views

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

To change reasons for removing a contact record from a roster

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

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

Tips

The following information may be helpful when managing company rosters:

- By default, customers who create a user account through your public website are not associated with a company, even if they type in the name of their company when registering.

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

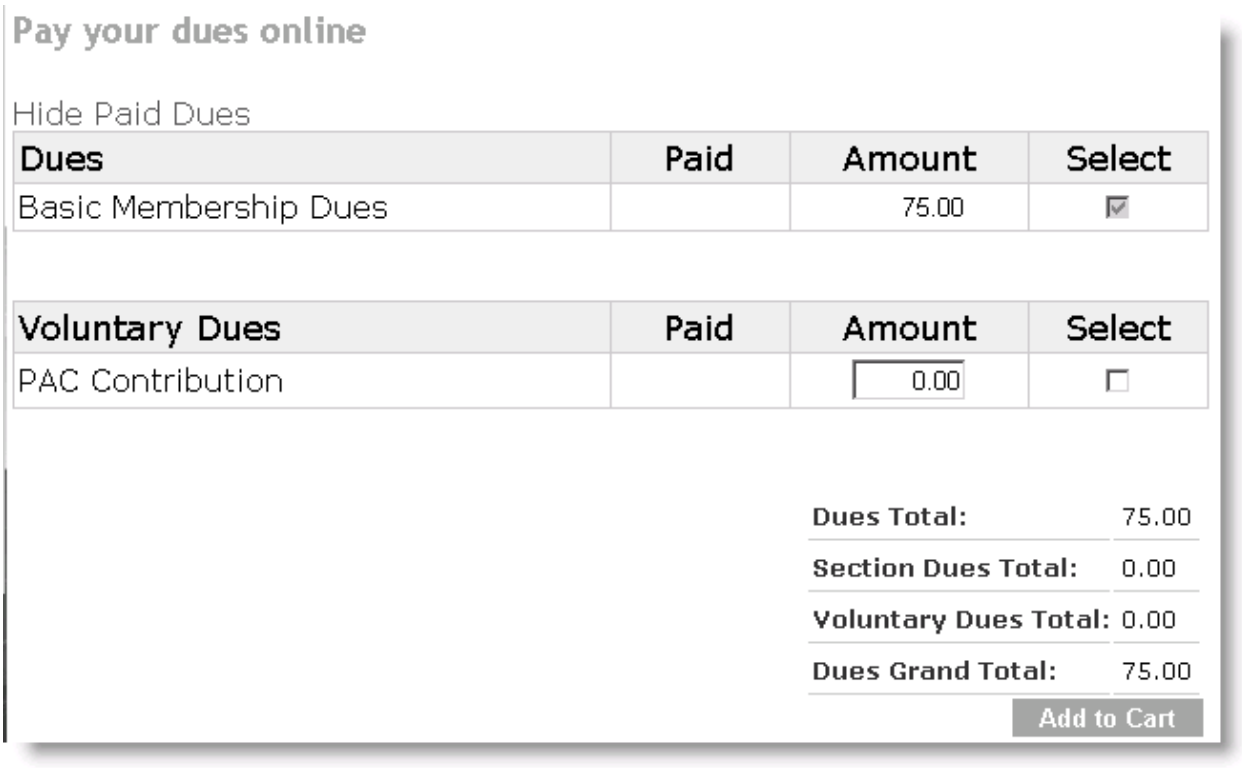
  Note: Your iMIS database may organize its members or customers by libraries or hospitals or another institution or affiliation using the Institute Type field in the Customer Setup - Basic Options window from Customers > Set up module > General > Basic Options. While this document refers to the default term "Company" your iMIS configuration may use another term based on Institute Type.
- When you delete a contact from a company roster, iMIS asks for a reason for deleting. There are six default selections but these can be edited or added to as described above.

Contacts Billing

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

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

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

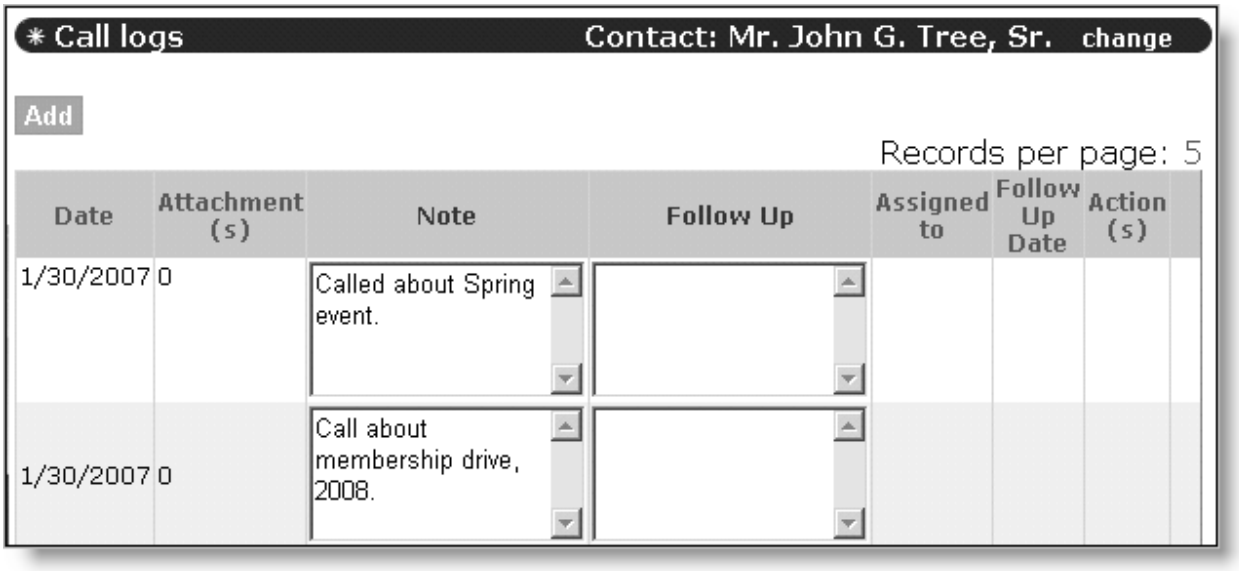


Contacts Activities

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

Contacts Call logs

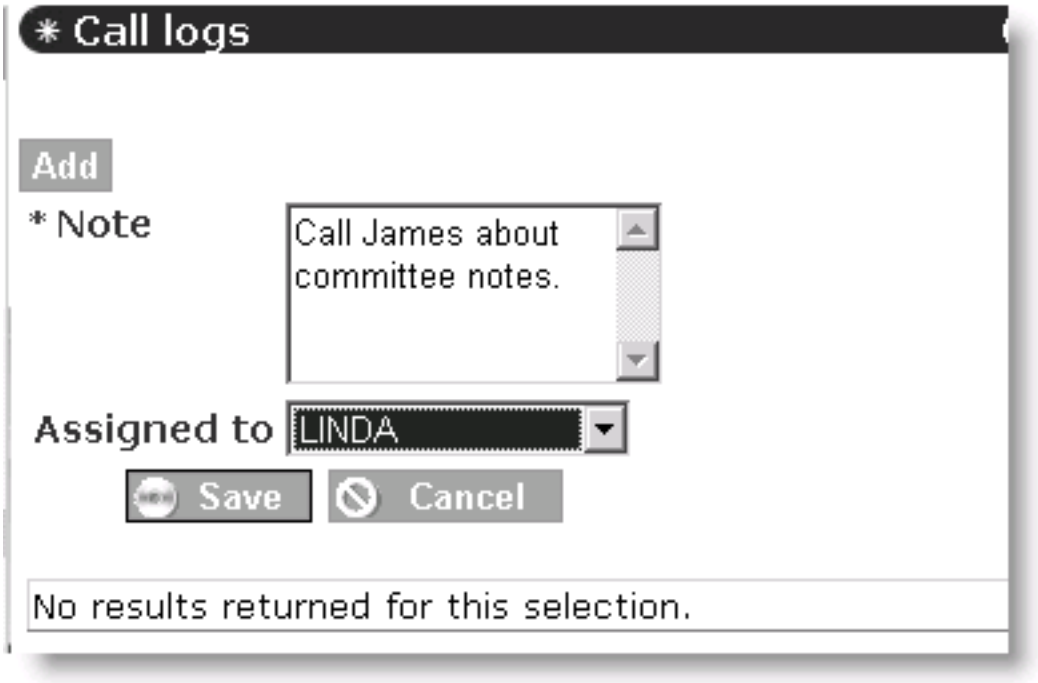
On the Call logs page of the Contacts tab, you can view and add a call activity for a contact.



Contacts > Contact Management > Call logs

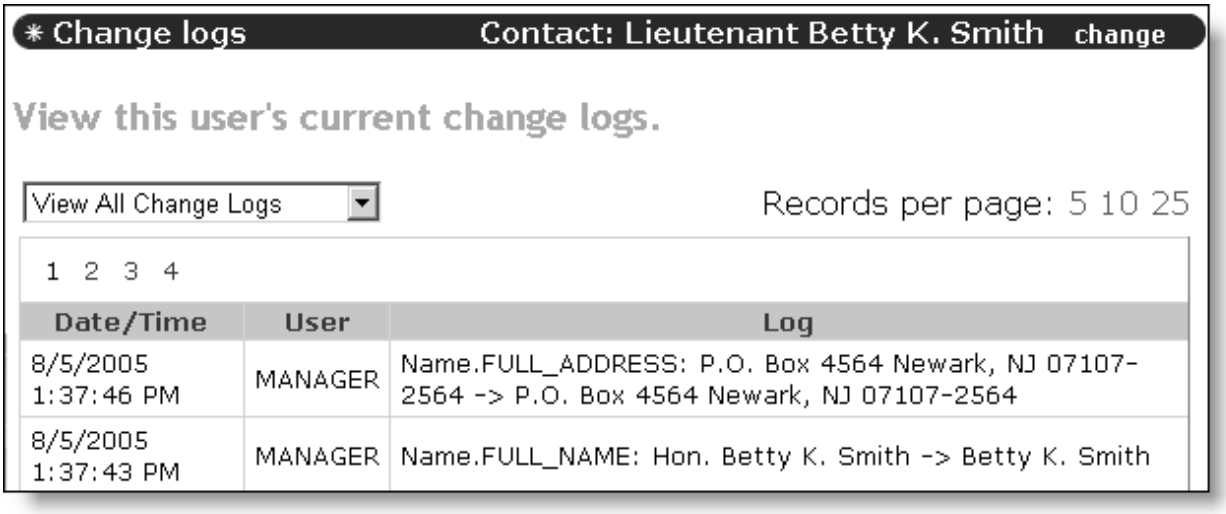
To add an activity

1. To add an activity, select the record.
2. Click Add to record a new call activity.



Contacts Change logs

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



Contacts > Contact management > Change logs

Contacts Orders

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

1. From the Orders option on the Contacts tab, you can view a contact's orders.
2. Choose the View Order by option on the drop-down list.
3. From the list of orders, click View Details.
4. When you view the details, you may chose to Resend the Order Confirmation.

Contacts Fundraising

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

Contacts > Contact management > Fundraising

User defined fields

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

Contacts > Contact management > User defined fields

Configuring settings for roster management

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

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

To configure settings for roster management

1. Log in as an administrator.
2. Go to System Setup > Set up customer web components > Roster Management Configuration.
3. Configure the following options:

- Select Roster management enabled in iMIS Web Components.
- To allow the Company Administrator to add new accounts to their company roster from your site, select New accounts can be created from roster management.
- If you want to change from the default value of 15, you can modify the value in the Number of members to show at once field.

4. Go to System Setup > Set up customer web components > Personal information configuration.

- In the Member Type Choices field, enter the codes for the member types that may be selected when creating new accounts or editing accounts within the Public view.

5. Determine which designated members may be Company Administrators who can manage the roster list.
6. Assign these users to the Company Administrator role by going to System Setup > Security Administration > Users and assigning the role.

Tips

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

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

Content Management Implementation

Getting started: iMIS content management implementation

iMIS content management implementation is the process of installing iMIS content management, configuring the global infrastructure for your iMIS content management environment, and performing the initial implementation of iMIS sites so that they can be subsequently managed and populated by day-to-day iMIS content management users. iMIS content management implementation comprises the following activities:

- Installing and configuring iMIS content management on each web server that is used for hosting iMIS sites.
- Implementing iMIS sites, including the optional migration of legacy content (such as e-Content Manager 5.x sites) into the iMIS content management environment.

  Note: iMIS content management implementation involves technical decisions and possibly ASP.NET coding that should be performed by staff or consultants who are familiar with server administration and ASP.NET development techniques.

  Who depends on this?

  Your iMIS content management implementation tasks must be completed before the people who perform site management can define the appearance and navigation structure of iMIS sites, and can define the infrastructure for the web content authoring environment.

  What must be done before you can start?

  You cannot perform iMIS content management implementation tasks until after you have planned the specifics of your iMIS content management implementation with the assist-

ance of the various people who design, manage, and author content for your organization's sites.

Putting it all together

iMIS content management implementation comprises two general workflows:

- Installation and configuration entails the following actions:

1. Installing iMIS content management on web servers.
2. Defining publishing servers for each installed instance of iMIS content management, to control publishing to the iMIS sites hosted by that instance.
3. Scheduling content authoring workflow updates on your production application server to enable iMIS to process content expiration notices and the removal of expired content.
4. Granting security access to iMIS content management features.
5. Defining global iMIS content management properties.
6. (optional) Viewing publishing server error logs to troubleshoot publishing issues.

- Website implementation entails the following actions:

1. Defining iMIS sites.
2. (optional) Adjusting the site keep-alive service.
3. (optional) Integrating hand-built master pages and themes with iMIS content management to enable your custom web design to be used when defining iMIS sites.
4. (optional) Defining custom iParts as content types to expand the selection of iParts available to the people who perform web content authoring.
5. (optional) Defining navigation areas and breadcrumb areas for use in your master pages.
6. (optional) Extending the default search behavior to match your web design guidelines.

7. (optional) Extending the default content and index renderers to modify how content records and iParts are rendered for browser display and indexed by the search engine.

   The functionality of each tool is the same in all places.

   More

- Developer articles on iMISCommunity
- Microsoft Developer Network

iMIS content management installation and configuration

Configuration involves installing iMIS content management on web servers and enabling support for iMIS content management both in iMIS and in Internet Information Services (IIS) on every server that you use for hosting iMIS sites.

Required tasks

You must perform these configuration tasks before you use iMIS content management for production work. All three tasks are performed in iMIS:

1. Scheduling content authoring workflow updates
2. Granting security access to iMIS content management features
3. Defining global iMIS content management properties

   You must install iMIS content management on one or more external web servers if you want to avoid using your iMIS application server to host public-facing sites. If you are creating only intranet sites for use inside your local network, you can use your production iMIS application server for this purpose. There is no need to install iMIS content management on any servers in this case, because your iMIS application server already contains everything needed to host iMIS sites.

If you do install iMIS content management on one or more web servers, you must also perform Defining publishing servers to connect iMIS to the publishing service on each web server.

When you install iMIS content management on a 64-bit configuration, you must define the publishing server to use the required Program Files (x86) path.

Installing iMIS content management on web servers

To install iMIS content management on web servers

Note: Do not perform this procedure on your production iMIS application server if you installed it using the Complete option of the iMIS Installer, because the supporting code for iMIS content management is already installed. Only perform this procedure on standalone web servers that are used for hosting iMIS sites.

Note: The term web server refers to any server that hosts iMIS sites, whether it is inside your network firewall (for private intranet sites) or outside your network firewall (for public-facing sites).

Run the iMIS installer on each web server and use the Custom installation option to install only the iMIS content management component. This installs only the code needed to support iMIS sites and enable them to interact securely with your iMIS database. It also installs the publishing service used for publishing new content to the iMIS sites on this web server, defines a corresponding publishing server in the iMIS database, and it sets up a dedicated IIS application in the IIS Default Web Site, to use for hosting iMIS sites.

During the installation, be aware of the following important considerations:

- Be sure to configure your networks and servers to run efficiently. See Best Practices for additional information.
- You are given an opportunity to change the default name WCM for the IIS application that will host your iMIS sites. You would do this if you prefer that the URLs to each of your iMIS sites contain a different application segment other than /wcm/, for example, http://www.myorg.org/usa/mywebsite/ instead of the default http://www.myorg.org/wcm/mywebsite/. Whether you rename the application or leave it at the default

value, you must communicate the URL that resolves to this new application to the people who define your iMIS sites, because they must specify this URL in the URL(s) pointing to the IIS website root when defining sites.

- The standard installation of iMIS content management is designed to enable the installed IIS application to host multiple iMIS sites with a minimum of required hard drive space. If you prefer to simplify the URLs for your iMIS sites by using one IIS application per iMIS site or even by using one IIS website per iMIS site, you can do so only after you have completed the standard installation of iMIS content management. The process requires some manual steps described below in the Tips section, and requires roughly 1.6GB of additional disk space per each additional IIS application or IIS website.
- When prompted to specify a Publishing Server Code, you must specify a new value that is unique among all your iMIS application servers and iMIS content management web servers. Do not accept the default value of A because this was probably already used when your iMIS application server was installed.
- When prompted to specify an Indexing Catalog Name, you can safely leave it at the default value unless you use Microsoft Index Server for other IIS applications on the server, and you want to combine the search data from several IIS applications into a single catalog. In this case, you would specify the name of that central Index Server catalog.

  Note: On iMIS application servers that were installed with the Complete option, or that were Custom-installed with both the iMIS content management component and the iMIS application component, the iMIS application hosts the staff views of iMIS and all of your iMIS sites, which means that the URLs to the iMIS sites hosted on your iMIS application server all contain an /imis/ segment, for example, http://www.myorg.org/imis/mywebsite. The Tips section below describes some methods you can use to manually create one or more IIS applications or even IIS websites specifically for hosting your iMIS sites so that their URLs do not contain an /imis/ segment.

  Troubleshooting

- The web server must have a supported version of Internet Information Services (IIS), and you must have prepared the web server as described in Preparing all servers and work-stations.
- You must have administrative access to IIS and the entire file system on both the web server and on your iMIS application server, because in some scenarios you might need to manually copy some files that are located on your iMIS application server.

  Tips

  The following information can be helpful when installing iMIS content management on web servers.

  Where should you host iMIS sites?

  If you installed your production iMIS application server using the Complete installation option, the application server has all the components needed to host iMIS sites. It is safe to use your iMIS application server to host private intranet sites for your organization. However, it is not recommended to use your iMIS application server for hosting your pub-lic-facing sites because doing so would expose the iMIS application to web clients out-side your network firewall, which can pose security risks. Typically, you should instead host your public-facing iMIS websites on external web servers that are located outside your network firewall, and you should install only the iMIS code needed for iMIS websites to run on those external web servers.

  Note: For iMIS release 15.2.1 through 15.2.10, a full install of iMIS is required.

  If your organization has a broad geographical presence, you might choose to use multiple external web servers in different geographic locations to provide load-balancing and improve geographic latency, as well as to provide different content for each geographic region.

  Controlling which servers actually host a site

  The definition of an iMIS site, its sitemap and navigation items, and its content records exist in the iMIS database, and the site's graphics and files for download all exist in the file system of your production iMIS application server. The publishing mechanism of iMIS

content management renders all this source content into the various files that IIS needs to host the site, and then places these files on each server that you specify should actually host the site.

You control which servers in your environment actually host the site through the URL(s) pointing to the IIS website root field in the site's definition. Each URL listed in this field must resolve to an IIS application or IIS website on a server where you have installed iMIS content management.

For example, if you want to host a site on both your production iMIS application server and an external webserver, the two URLs you would enter in this field would look like the following: http://myimisappserver/imis/, http://www.myorg.org/wcm/. If the defined URL Name of this Website is mysite, then entering http://myimisappserver/imis/mysite in a web browser would view the site as hosted by your production iMIS application server, and entering http://www.myorg.org/wcm/mysite in a web browser would view the same site as hosted by your external web server.

To ensure that content for the site is rendered and copied to each server that hosts the site, the two halves of the publishing mechanism for each server must be correctly defined with a unique Publish Server Code. This is automatically configured by the iMIS installer if you specified a unique code for each server during installation, but because the iMIS installer defaults to a value of A for this code, you can inadvertently end up with duplicate Publish Server Codes in your production environment.

Assuming that the publishing mechanism is correctly defined for each of the servers that are hosting the site, all that's left in our example scenario is to specify the A and B codes (or the value All) that correspond to these publishing servers in the Publish on Servers field. This field is found in the definition of each content folder that contains the content records whose rendered output we want to have available to the site on each server. When you publish a content record, it is this field in the parent content folder that determines which publishing services should process the new content record and place its rendered output in the file system on their server. This enables the site's navigation items to find the rendered versions of their corresponding content records in the local file system of each server.

Manually creating additional IIS applications for your iMIS sites

Caution! The techniques described in this section can give you more control over the URLs that point to your iMIS sites, but this requires increased disk space requirements and increased maintenance overhead. These techniques involve manually creating additional copies of the Net folder that contains all the iMIS code that supports iMIS sites (roughly 1.6 GB of disk space required per copy). These additional copies cannot be detected by the iMIS Installer for software upgrades. Therefore, after every iMIS upgrade that you install, you must manually copy all files that were changed by the upgrade from the originally installed Net folder (and in all of its sub-folders) into the additional instances of the Net folder.

Note: If you use the techniques in this section to create additional IIS applications for hosting your iMIS sites, be sure to communicate the corresponding new URLs to those who define your iMIS sites, because they must specify these URLs in the URL(s) pointing to the IIS website root when defining sites.

In the preceding section, the iMIS Installer created a single IIS application for hosting all of your iMIS sites on the web server. You can alternatively use more than one IIS application for hosting your iMIS sites. To understand the potential benefits of doing this, let's examine how the URLs for your iMIS sites look when you use only one application to host all of them.

Assume that your organization's domain name is www.myorg.org, and that when you used the iMIS installer to install the iMIS content management component on a web server, you used the default name of iMIS content management for the IIS application that will host your iMIS sites. You next defined two iMIS sites: one whose URL name of this website is USA, and the other whose URL Name of this website is EUROPE. For both of these sites, you specified http://www.myorg.org/wcm/ as their URL(s) pointing to the IIS website root. Finally, since both sites are hosted by the same IIS application, you specified the USA site to be the default site for this IIS application by selecting the Make this website the default checkbox.

In this scenario, the URLs that would resolve to each site are:

- http://www.myorg.org/wcm/ - the USA site
- http://www.myorg.org/wcm/usa/ - the USA site
- http://www.myorg.org/wcm/europe/ - the EUROPE site

  Note: Regarding the first http://www.myorg.org/wcm/ URL in this scenario, the moment that you navigate away from the home page, the URLs will start showing the full URL, including the segment for the IIS application name, for subsequent pages: http://www.myorg.org/wcm/usa/[theRestOfTheURL].

  You might decide that this dynamic URL rewriting behavior for several iMIS sites that are hosted by the same IIS application results in URLs that are too long or otherwise confusing to remember. In this case, you could simplify the URLs for your sites by manually creating a separate IIS application for each iMIS site. This removes the need to specify the extra URL segment that identifies the URL Name of this website.

  The following process describes how to set up one such additional application. You must repeat this process for each application you add to the IIS Default Web Site:

1. On the application server or web server where you are creating the additional IIS application, you must first create a new copy of the Net folder that contains all the ASP.NET code used by iMIS.

   It doesn't matter where you put this copy of the Net folder, but your changes can be predictable to other administrators if you put each copy in a folder at the same level as your iMIS folder. So for example, you could create a new folder in C:\Program Files\ASI called WCM Sites, and then copy the entire Net folder (located by default in C:\Program Files\ASI\iMIS) into the WCM Sites folder, resulting in C:\Program Files\ASI\WCM Sites\Net. You still have your original C:\Program Files\ASI\iMIS\Net folder as well. This file path to the new copy of the Net folder is what you must specify as the Physical Path to the new IIS application in the next step.
2. In IIS on this server, add the new application directly beneath the Default Web Site, specifying an Alias that makes sense in the context of a root URL that points to your organization's sites.

The Physical path must be the full path to the copy of the Net folder that you created in the previous step. The corresponding path credentials must be set to connect as the application user (pass-through authentication). If you are using IIS7 and later, you must also select the iMISApp AppPool to ensure that you are using the Integrated pipeline mode and sharing the same application pool as the other iMIS-related applications on the server.

3. In IIS on this server, the 404 redirect for the new application incorrectly points to the 404.aspx file in the root of the physical path for the application that was originally installed by the iMIS Installer (the original Net folder). For example, if you installed the full iMIS application as part of a Complete iMIS installation, the path for the 404 redirect specifies /iMIS/404.aspx (where iMIS represents the application name in IIS). You must replace this application name segment with the new application name, so that IIS will look in the physical path for your new application for the custom 404.aspx file.

   In IIS, open the Error Pages settings for the new website and edit the 404 entry to Execute a URL on this site, with the URL specified as /[applicationName]/404.aspx. For example, if you named this new application with the alias USA, then this URL would be specified as /usa/404.aspx.

4. On this server, open a command prompt window and run the following command to create a new instance of the publishing service to control publishing of content to this new physical path for the IIS application:

   %WINDIR%\Microsoft.NET\Framework\v4.0.30319\InstallUtil.exe /ServiceName=[AsiPublishing15Secondary][file path to copied Net\bin folder]\PublishService.exe

- The path to the InstallUtil.exe utility provided with the ASP.NET framework assumes that you have installed the framework in the default location.
- The [AsiPublishing15Secondary] string should be replaced by the specific name that you want to give to each additional instance of the publishing service.
- The [file path to copied Net\bin folder] string should be the absolute path to the bin folder in the new copy of the Net folder that you created in Step 1. For example, C:\Program File\ASI\WCM Sites\Net\bin.

5. Manually modify the Publish Server Code of this new instance of the publishing service to be unique among all publishing services in your environment, as described in Defining publishing servers. When you define a new publishing server, the Frequency and Publishing Speed values default to zero. You should set them to Frequency=10 and Publishing Speed=100.
6. Modify the configuration file for this new instance of the publishing service to listen on a different port than the one used by the default instance:

- In the new copy of the Net folder that you created in step 1, edit the file ..\bin\PublishService.exe.config.
- Locate the following element and change the port value to some unused port number in your environment:

  <channel ref="tpc" port="15151">

7. Modify the search configuration file for this new application to communicate with the same port number that you specified for the new instance of the publishing service.

- In the new copy of the Net folder that you created in Step 1, edit the file SearchRemoting.config.
- Locate the following element and change the port segment of the url value to the same port number that you specified in Step 6.

  <client url="tcp://localhost:15151">

8. In the Maintenance section of iMIS content management, define a new publishing server to control the publishing service, as described in Defining publishing servers.

   Assume that you have used this process to create two additional IIS applications: one with the alias USA, and the other with the alias EUROPE. Your two sites still have the same URL names as in the previous scenario (still USA and EUROPE), but the URL names won't matter because they are used only to differentiate among multiple sites when they share the same IIS site root. What's different in this scenario is that the USA site specifies http://www.myorg.org/USA/ as its URL(s) pointing to the IIS website root,

and the EUROPE site specifies http://www.myorg.org/EUROPE/ as its URL(s) pointing to the IIS website root.

In this scenario, the URLs that resolve to each site would be:

- http://www.myorg.org/usa/ - the USA site
- http://www.myorg.org/europe/ - the EUROPE site

The following two URLs would also work but they are longer and contain redundancy, so there's no need to communicate these to your members or the general public. The last segment, which specifies the URL name of this website, is not needed by iMIS content management to determine which site to display.

- http://www.myorg.org/usa/usa - the USA site
- http://www.myorg.org/europe/europe - the EUROPE site

Caution! If the structure of your added IIS applications results in a situation where you have one IIS application that hosts iMIS sites nested inside of another IIS application that also hosts iMIS sites, you must remove some elements from their respective web.config files in all but the top-most application in this nested hierarchy. Remove the <system.webserver> element. If its parent <location> element is subsequently empty (contains no other elements), then remove the <location> element as well.

Hosting sites as an IIS website instead of as an IIS application

Caution! The techniques described in this section can give you more control over the URLs that point to your iMIS sites, but this requires increased disk space requirements and increased maintenance overhead. These techniques involve manually creating additional copies of the Net folder that contains all the iMIS code that supports iMIS sites (roughly 1.6 GB of disk space required per copy). These additional copies cannot be detected by the iMIS Installer for software upgrades. Therefore, after every iMIS upgrade that you install, you must manually copy all files that were changed by the upgrade from the originally installed Net folder (and in all of its sub-folders) into the additional instances of the Net folder.

Note: If you use the techniques in this section to create additional IIS websites for hosting your iMIS sites, be sure to communicate the corresponding new URLs to those who define your iMIS sites, because they must specify these URLs in the URL(s) pointing to the IIS website root when defining sites.

If you prefer to host an iMIS site at the level of an IIS website instead of at the level of an IIS application, it is possible to do this by using a process that is very similar to that described in the preceding section. This technique enables you to create an even shorter URL for an iMIS site, such as http://www.myorgusa.org/ instead of http://www.my-org.org/usa/.

You must repeat this process for each IIS website you create:

1. Create a new copy of the Net folder that contains all the ASP.NET code used by iMIS on the application server or web server where you are creating the additional IIS website.

   It does not matter where you put this copy of the Net folder, but your changes can be predictable to other administrators if you put each copy in a folder at the same level as your iMIS folder. So for example, you could create a new folder in C:\Program Files\ASI called WCM Sites, and then copy the entire Net folder (located by default in C:\Program Files\ASI\iMIS) into the WCM Sites folder, resulting in C:\Program Files\ASI\WCM Sites\Net. And you still have your original C:\Program Files\ASI\iMIS\Net folder as well. This file path to the new copy of the Net folder is what you must specify as the Physical Path to the new IIS website in the next step.

2. Add the new website In IIS on this server, specifying the Physical path as the full path to the copy of the Net folder that you created in the previous step.

   The corresponding path credentials must be set to connect as the application user (pass-through authentication). If you are using IIS7 and later, you must also select the iMISApp AppPool to ensure that you are using the Integrated pipeline mode and sharing the same application pool as the other iMIS-related applications on the server.

3. In IIS on this server, the 404 redirect for the new website incorrectly points to the 404.aspx file in the root of the physical path for the application that was originally installed by the iMIS Installer (the original Net folder). For example, if you installed the full iMIS

application as part of a Complete iMIS installation, the path for the 404 redirect specifies /iMIS/404.aspx (where iMIS represents the application name in IIS). You must remove this application name segment from the path so that IIS will look in the physical path for your new website for the custom 404.aspx file. In IIS, open the Error Pages settings for the new website and edit the 404 entry to Execute a URL on this site, with the URL specified as /404.aspx.

4. On this server, open a command prompt window and run the following command to create a new instance of the publishing service to control publishing of content to this new physical path for the IIS website:

   %WINDIR%\Microsoft.NET\Framework\v4.0.30319\InstallUtil.exe /ServiceName=[AsiPublishing15Secondary][file path to copied Net\bin folder]\PublishService.exe

   - The path to the InstallUtil.exe utility provided with the ASP.NET framework assumes that you have installed the framework in the default location.
   - The [AsiPublishing15Secondary] string should be replaced by the specific name that you want to give to each additional instance of the publishing service.
   - The [file path to copied Net\bin folder] string should be the absolute path to the bin folder in the new copy of the Net folder that you created in Step 1. For example, C:\Program File\ASI\WCM Sites\Net\bin.

5. Manually modify the Publish Server Code of this new instance of the publishing service to be unique among all publishing services in your environment, as described in Defining publishing servers.

6. Modify the configuration file for this new instance of the publishing service to listen on a different port than the one used by the default instance.

   - In the new copy of the Net folder that you created in Step 1, edit the file ..\bin\PublishService.exe.config.
   - Locate the following element and change the port value to some unused port number in your environment.

     <channel ref="tpc" port="15151">

7. Modify the search configuration file for this new IIS website to communicate with the same port number that you specified for the new instance of the publishing service.

- In the new copy of the Net folder that you created in step 1, edit the file SearchRemoting.config.
- Locate the following element and change the port segment of the url value to the same port number that you specified in Step 6.

  <client url="tcp://localhost:15151">

  Go to RiSE > Maintenance > Publishing servers:

8. Define a new publishing server to control the publishing service, as described in Defining publishing servers.

   Caution! If the structure of your added IIS websites results in a situation where you have one IIS application that hosts iMIS sites or iMIS applications nested inside of an IIS website that also hosts iMIS sites, you must remove some elements from their respective web.config files in all but the top-most IIS website in this nested hierarchy. For example, this situation could occur if you configure the IIS Default Web Site on your production iMIS application server to host some intranet iMIS sites, because the iMIS application is one of the applications located in the IIS Default Web Site. Remove the <system.webserver> element. If its parent <location> element is subsequently empty (contains no other elements), then remove the <location> element as well.

   Dynamic URL rewriting

   The scenarios described in the preceding two sections illustrate the way that iMIS content management performs dynamic URL rewriting.

   To choose which files to serve up to a requesting web browser, the iMIS content management code located in the physical path of the IIS application or IIS website matches the requested URL to the URL(s) pointing to the IIS website root property of the various iMIS sites in the system. If there is only one iMIS site defined in the system that uses this requested URL, then the iMIS content management code serves up the home page for that iMIS site to the requesting browser.

However, if the iMIS content management code determines that there are multiple iMIS sites that share the same requested URL in their URL(s) pointing to the IIS website root property, it then parses the following URL segment and matches this value to the URL name of this Website property of the various iMIS sites in the system to determine which site's home page to serve up to the requesting browser.

Defining publishing servers

To define publishing servers

Go to RiSE > Maintenance > Publishing servers:

Select an existing publishing server to change its properties, or you can add or delete a publishing server.

To verify/change a publishing service code

Do the following to verify or change the Publishing Server Code assigned to an installed publishing service:

1. Open the PublishService.exe.config file in a text editor on the appserver or external web server. Default location is C:\Program Files\ASI\iMIS\Net\bin
2. In the <SystemParams> declaration, verify or change the value of the PublishServerCode key. The value must be a single uppercase letter from A to Z, and must be unique among all publishing services used by a given instance (database) of iMIS.

To manually define additional publishing servers

The iMIS installer automatically defines a corresponding publishing server for the default instance of the publishing service installed by iMIS. However, in some iMIS content management installation scenarios, you must manually install one or more additional instances of the publishing service at a command line.

1. Manually create a single corresponding publishing server for every publishing service that you have manually installed.
2. When you add a new publishing server, review the Publish on Servers property for all existing content folders to specify whether the rendered files from content records in

those folders should be made available to the iMIS sites that are associated with these manually-created publishing servers.

To define sets of publishing service codes

When you install iMIS content management on a web server (or install an additional publishing service for each manually created IIS application or IIS website), you are prompted to specify a Publishing Server Code to uniquely identify the publishing service that is created during installation (it always defaults to the value A). When you define a publishing server in the iMIS content management environment to control the behavior of a specific publishing service, you use this code to link the publishing service to its corresponding publishing server.

The Publishing Server Code must be unique among all publishing services used by a given instance of iMIS. For example, your production iMIS server might use the code A to identify its instance of the publishing service, and you might also have three other external web servers located in different geographic locations whose Publishing Server Codes might be B, C, and D, respectively.

Tip: You can duplicate codes across test and production instances, since they're still unique within their specific databases.

Caution! The publishing server associated with the base iMIS installation must always be defined as the only Default (the one PublishServerRef row set with the IsDefault flag). Unless this one instance is set as the default, the Multi-Instance Utility will not work as expected.

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must already have installed iMIS content management on one or more web servers and noted the Publish Server Code that you specified to use for the iMIS publishing service that was installed during that process.

  Note: You must associate no more than one publishing server with each publishing service. If your environment has more than one IIS application or IIS website that is hosting

iMIS sites on a given server, you must install one publishing service for each such IIS application and IIS website, and you must define a single corresponding publishing server for each publishing service. See Installing iMIS content management on web servers.

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

Scheduling content authoring workflow updates

To schedule content authoring workflow updates

Caution! You must perform this task to enable content authoring workflow to function properly.

Some workflow-related actions are initiated directly by users, such as approving a publishing request in your Content Designer Task List. However, the workflow actions related to managing expired content, such as sending expiration notices or removing content that has expired are managed by a program called ContentWorkflow.exe, which must be manually added to the Windows Task Scheduler on your production iMIS application server.

The Task Scheduler is slightly different on each version of Windows, so adapt the following steps as needed:

1. Create a Basic task in the Task Scheduler Library folder.
2. Create a daily Trigger for the task, so that expired content is checked for once per day.
3. For the Action, select to Start a Program and specify ContentWorkflow.exe, which is located by default in C:\Program Files\ASI\iMIS\Net\bin\. Do not specify any optional arguments or a start-in folder.

4. Find the new task that you created in the Task Scheduler Library folder and modify the following properties:

- On the General tab, select the option that enables the task to be run regardless of whether you are logged on or not.
- On the Settings tab:
- Select the option that enables the task to be run as soon as possible after a scheduled start is missed, and also:
- Select the option that stops the task if it runs longer than a certain duration and specify a value, such as 2 hours.

  Troubleshooting

- You must have administrative access to the Windows Task Scheduler and the entire file system on your iMIS application server.
- Your user account on the iMIS application server must have Log on as batch job rights.

Granting security access to iMIS content management features

Accessing major features

The following guidelines help define who can access major features in iMIS:

- Full users who are members of at least one CAG can access Site Designer, the Content Designer tool, and the Tagging and Reports features in iMIS content management.
- Full users who are members of at least one Master Admin CAG can access the Maintenance features in iMIS content management.
- SysAdmin users must belong to at least one CAG, with the appropriate CAG permissions, to participate in web content authoring workflow.

  Note: To access Surf-to-Edit, users must be logged on and must be a member of at least one content authority group (CAG).

  Accessing the maintenance features of iMIS content management

  Go to RiSE > Maintenance:

Only members of the SysAdmin role and members of a MasterAdmin CAG can use the maintenance features of iMIS content management.

Accessing the content record commands

A Full user needs both the listed CAG permissions and Document System permissions to use the listed Document System toolbar commands when working with content records.

Note: Casual and Public users can also work with content records through Surf-to-Edit, but their access is very limited compared to Full users. At the least, they must be a member of a CAG, which grants them the ability to request changes for a content record when in Surf-to-Edit mode. They can edit a content record when in Surf-to-Edit mode only if they have been granted Content Editor permissions in at least one CAG and they have been granted Edit Document System permissions on the content record that they want to edit.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	Content Approver	Edit AND Delete
Organize > Copy	Content Editor	none
Organize > Paste	Content Editor	Add (on parent content folder)
Organize > Select All	none	none
Organize > Delete (request only)	Content Editor and NOT Content Approver	Edit
Organize > Delete	Content Approver	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	Content Approver	Delete
New > Website Content	Content Editor	Add (on parent content folder)
New > Website Content	Folder Creator	Add

Folder		
Edit	Content Editor	Edit
Import	Content Editor	Add (on parent content folder)
Export	member of a CAG	none
Versions	Content Editor	Edit
Run	none	none
Submit	Content Editor and NOT Content Approver	Edit
Publish	Content Approver	none
Preview	none	Read
Search	none	none

Accessing the content layout commands

A Full user needs both the listed CAG permissions and Document System permissions to use the listed Document System toolbar commands when working with content layouts. Casual and Public users cannot work with content layouts.

Note: The Add Document System permissions listed in the following table must be set on the parent folder for content layouts. All other listed Document System permissions must be set on the objects within that parent folder by setting the same permissions on the parent folder and selecting the Apply changes to all descendants checkbox. The easy way around all this is to ensure that the people working with content layouts are all members of the SysAdmin role. The ContentLayouts parent folder must be accessed through the Document System, then go to ContentManagement > DefaultSystem.

Note: Access the Recycle Bin through the Document System.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	Layout Editor	Edit AND Delete (on parent folder)
Organize > Copy	Layout Editor	none

Organize > Paste	Layout Editor	Add (on parent folder)
Organize > Select All	none	none
Organize > Delete	Layout Editor	Delete (on parent folder)
Organize > Properties	none	none
Organize > Empty the Recycle Bin	Layout Editor	Delete (on parent folder)
New > Content Layout Definition	Layout Editor	Add (on parent folder)
Edit	Layout Editor	Edit (on parent folder)
Import	Layout Editor	Add (on parent folder)
Export	member of a CAG	none
Versions	Layout Editor	Add (on parent folder)
Search	none	none

Accessing content type commands

A Full user must be either a member of the SysAdmin role or a member of at least one Master Admin CAG to enable use of the listed Document System toolbar commands when working with content types. Casual and Public users cannot work with content types.

Note: The parent folder for content types must be accessed through the Document System, then go to ContentManagement > DefaultSystem.

Note: Access the Recycle Bin through the Document System.

Accessing sitemap (navigation item) commands

A Full user needs both the listed CAG permissions and Document System permissions to enable use of the listed Document System toolbar commands when working with navigation items. Casual and Public users cannot work with navigation items.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	Navigation Creator	Edit AND Delete

Organize > Copy	Navigation Creator	none
Organize > Paste	Navigation Creator	Add (on parent navigation item)
Organize > Delete	Navigation Creator	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	none	Delete
New > Website Navigation Item	Navigation Creator	Add (on parent navigation item)
Edit	Navigation Creator OR Navigation Editor	Edit
Import	Navigation Creator	Add
Export	member of a CAG	none
Versions	Navigation Creator or Navigation Editor	Edit
Run	none	Read
Publish	Navigation Creator or Navigation Editor	none
Preview	none	Read
Search	none	none

To grant access to tagged list format commands

A Full user needs both the listed CAG permissions and Document System permissions to enable use of the listed Document System toolbar commands when working with tagged list formats. Casual and Public users cannot work with tagged list formats.

Note: The Add Document System permissions listed in the following table must be set on the parent folder for tagged list formats. All other listed Document System permissions must be set on the objects within that parent folder by setting the same permissions on the parent folder and selecting the Apply changes to all descendants checkbox. (The easy way around all this is to ensure that the people working with tagged list formats are

all members of the SysAdmin role.) The TaggedListFormats parent folder must be accessed through the Document System, then go to ContentManagement > DefaultSystem.

Note: Access the Recycle Bin through the Document System.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	none	Edit AND Delete
Organize > Copy	none	Read
Organize > Paste	none	Add (on parent folder)
Organize > Select All	none	none
Organize > Delete	none	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	none	Delete
New > Tagged List Format	none	Add (on parent folder)
Edit	none	Edit
Import	none	Add (on parent folder)
Export	none	Read
Preview	none	Read
Publish	none	Edit
Search	none	none

To grant access to site commands

A Full user needs both the listed CAG permissions and Document System permissions to enable use of the listed Document System toolbar commands when working with iMIS sites.

Note: You can grant Casual and Public users permissions to work with content records, but they can access content records through Surf-to-Edit only.

Toolbar command	CAG permissions	Document System permissions

Organize > Refresh	none	none
Organize > Cut	none	Edit AND Delete
Organize > Copy	none	Read
Organize > Paste	none	Add (on parent folder)
Organize > Delete	none	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	none	Delete
New > Folder	none	Add (on parent folder)
New > Website	none	Add (on parent folder)
Edit	none	Edit
Import	none	Add (on parent folder)
Export	none	Read
Versions	none	Edit
Run	none	Read
Publish	none	Edit
Preview	none	Read
Search	none	none

Troubleshooting

- You must be a member of the SysAdmin role, and you must have authorization level 1 or greater in Sys Mgmt.
- Remember: You can grant Casual and Public users permissions to work with content records, but they can access content records through Surf-to-Edit only.

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

Defining global iMIS content management properties

Go to RiSE > Set up content management:

Review the following setup pages, modifying the default values as desired:

- Quick setup
- Site designer configuration
- Content designer configuration
- Search configuration
- Workflow configuration

Note: In the Workflow configuration window, be sure to change the default values of the ND.ExpirationEmailFromAddr and CM.ExpirationEmailFromAddr fields to the email address of a person in your organization.

Troubleshooting

- You must be a member of the iMIS SysAdmin security role.

Viewing publishing server error logs

Go to RiSE > Maintenance > Publishing servers:

Click error log for the publishing server you want to review. You can sort the log by any column. If you delete entries, they are permanently removed from the corresponding log file on the server host where the corresponding publishing service is installed (C:\Program Files\ASI\iMIS\Net\bin\PublishingService.log).

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).

Note: Membership in the SysAdmin security role effectively grants the full set of Document System permissions and the full set of CAG permissions (you are effectively a member of a MasterAdmin CAG as well). However, to participate in web content authoring

workflow, even members of the SysAdmin role must be an explicitly-listed member of at least one CAG.

Site implementation

Site implementation is the process of performing the initial creation and tailoring of iMIS sites so that they can be subsequently managed and populated by day-to-day iMIS content management users.

Defining iMIS sites

Go to RiSE > Site Designer > Manage websites:

Do one of the following:

- Select New > Website to create a new iMIS site.
- Click Edit to change an existing site.
- Select Organize > Delete to delete a site.

Define the site's Properties, Look and Feel, Navigation Areas, and Access Settings.

When specifying the URL(s) pointing to the IIS website root, you must use the URLs communicated to you by the person who installed iMIS content management on your organization's web servers. This list of URLs defines the specific servers that should host this site.

After saving the site definition, the site is in a Working state. Ensure that the site is selected, and then from the toolbar click Publish to promote the changes to all associated servers that host this site. When presented with publishing options, you must select the Publish children as well checkbox to ensure that the site's corresponding sitemap and content folder are published as well. Both the sitemap and the content folder have the same name as the site.

If the corresponding sitemap and content folder are empty, you must define at least one navigation item in the site's sitemap and a corresponding content record in the site's content folder before you can preview the site with a web browser, because at this point the

site is effectively empty. You must also designate at least one of these initial navigation items as the default web page and Home link for this site, by selecting the This navigation item is the Home link for the sitemap checkbox in the Options section of the navigation item's definition.

Note: If you attempt to preview the site before creating a navigation item (and corresponding content record) to be the default web page for the site, IIS will display an error message because the master page is expecting a default web page but none exists yet.

To copy theme files to other server hosts

If your site is being hosted by multiple servers (you specified more than one URL in the URL(s) pointing to the IIS website root field), you must manually copy these template files to the other servers that are hosting the site.

Copy the following files from their location relative to the root of the physical path associated with the iMIS application on the iMIS application server to which you were connected (through the staff view of iMIS) when you created the new site. On all the other iMIS content management web servers, place these copied files in the same location relative to the root of the physical path of the IIS applications and IIS websites that host the iMIS site on each server:

- ~\Templates\Masterpages\[websiteName].master
- ~\[websiteName]\Default.aspx
- ~\App_Themes\[websiteName] (the entire folder)

Troubleshooting

- You must be a member of at least one content authority group (CAG).
- On every web server that you plan to use for hosting iMIS sites, you must have performed all the steps described in Installing iMIS content management on web servers, and you must know the URL that points to the IIS application or IIS website that you created during that procedure for hosting your iMIS sites.

- If you plan to host an iMIS site on multiple servers, you must have administrative access to the file systems on each server.
- Modifications to your master pages might be required if iParts appear to overflow the boundaries of iPart zones. In general, this requires modifying the template's master page and accompanying CSS files to make the Home page and interior page layouts larger than their default size.

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

  Where to go from here?

  When you have created a brand new iMIS site, the system automatically creates a corresponding sitemap and a content folder that is already configured so that its children content records are included in searches that are performed on the site. The content folder is also configured by default to publish its children content records to all publishing servers defined in the system, which means that the publishing service for every IIS application and IIS website that hosts iMIS sites will render .aspx files for every published content record in the folder and place them in the Local Publish Path as specified in each publishing server's definition.

  This default configuration of the site's corresponding content folder makes it easy to build the site content by creating content records only in that particular content folder, and then creating corresponding navigation items for each of those content records.

  While this approach is simple, it doesn't take advantage of the flexibility and sophistication that iMIS content management content folders and publishing servers can provide. Here are some ideas for creating more sophisticated web content authoring and publishing configurations:

- You can use any combination of content folders and their content records to populate a site. This enables you to reuse a single content record in multiple sites. To do this, you

must make the following changes to every content folder that you want to use for a particular site's content (see Defining content folders):

- Specify the site in the Include content in Searches for these additional Sites field to ensure that searches performed on the site will find the content records in the content folder.
- Ensure that the Publish on Servers field resolves to a set of publishing servers that will publish the content records in the content folder to all of the IIS applications and IIS websites that host the iMIS site.
- Enable workflow for content authoring on one or more of the content folders used for the site's content to create a structured web content authoring environment. See Enabling workflow for content authoring.

Modifying the site navigation areas

Another aspect of a site's look and feel is the configuration of the navigation areas that are supported by the site's master page. In the Navigation Areas section of a site's definition, you can choose exactly which of the supported navigation areas are made available for use in the site's navigation items. You can also change the behavior of the available navigation areas by modifying their definition (but this affects all sites that use those navigation areas so care must be taken).

Additionally, you can define entirely new navigation areas and make them available for use in the site's navigation items if you also add supporting code for them in the site's master page.

The Auxiliary navigation area has two other additional controls following it, which visually appear to be part of the Auxiliary navigation area but are actually independent. If you modify the master page to relocate the Auxiliary navigation area, the following two controls will remain in their original location in the page layout:

- Authentication control - this is where the Log On or Log Off link appears.
- Surf-to-Edit control - this is where the icon that toggles Surf-to-Edit mode appears for

users who are logged on to the site and have the required permissions to use Surf-to-Edit.

Integrating hand-built master pages and themes with iMIS content management

To integrate hand-built themes with iMIS sites

In conformance with standard ASP.NET conventions, each theme must be placed in a uniquely named folder inside the ~\App_Themes folder in the physical path for each IIS application and IIS website used for hosting iMIS sites. This ensures that the theme name will be selectable when defining an iMIS site. The name you use for the folder is the name that users will see when choosing a theme for the iMIS site.

To ensure that all iMIS functionality is styled correctly, the best approach for developing new themes is to start with a Copying a site theme, instead of trying to develop a new theme entirely from scratch.

To integrate hand-built master pages with iMIS sites

Each master page must be placed in the ~\Templates\MasterPages folder in the physical path for each IIS application and IIS website used for hosting iMIS sites.

When developing a new master page, you must ensure that certain required ASP.NET classes are inherited and that certain required elements are used. There are also many optional elements that you might want to use. These classes and elements are described in the following sections.

Caution! Include non-required elements in your master page even if they are not required, and use a visible="false" attribute in each element that you do not want to display.

Note: To see examples of how these elements should be used in a hand-built master page, examine one of the Sample Site's master pages, such as Forrest.master, or Planets.master.

Required classes

- All master pages must inherit the Asi.Web.UI.MasterPageBase class, located in the Asi.Web assembly. This class provides base functionality for integration with iMIS. For example:

  <%@ Master Language="C#" Inherits="Asi.Web.UI.MasterPageBase" %>

- If you intend to use content areas and a different page layout for your Home page versus every other page on the site, then you should not directly inherit the Asi.Web.UI.MasterPageBase class, but instead inherit the Asi.Web.UI.TemplateGalleryMasterPageBase class (which in turn inherits the Asi.Web.UI.MasterPageBase class). For example:

  <%@ Master Language="C#" Inherits="Asi.Web.UI.TemplateGalleryMasterPageBase" %>

  Required elements in all master pages

  The following elements are required on every master page regardless of which base class the master page inherits:

- The head element must contain a child asp:ContentPlaceHolder element with an id attribute of TemplateHead. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateHead">

- The body element must contain a single child form element with an id attribute of TemplateForm. The runat attribute for this element must be server. This form element must be the only child of the body element and all DIV-based layouts must be contained within this form element. For example:

  <form runat="server" id="TemplateForm" method="post"></form>

- The asp:panel element with id="ContentPanel", which comprises the Main Content Area of an interior page, must contain the following elements:

- An asp:ContentPlaceHolder element with an id attribute of TemplateUserMessages. This displays non-fatal error and warning messages on pages. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateUserMessages">

- An asp:ContentPlaceHolder element with an id attribute of TemplateBody. This is where the rendered output of a content record is typically displayed. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateBody">

- The asp:Panel element with id="ButtonPanel", which conditionally displays the buttons at the bottom of the Main Content Area of an interior page (Save, Cancel, and so forth), must contain an asp:ContentPlaceHolder element with an id attribute of TemplateButtonBar. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateButtonBar">

- The asp:Panel element with id="SubNavPanel", which comprises the default Secondary navigation area of page, must contain an asp:ContentPlaceHolder element with an id attribute of SideBarPlaceHolder. This is used to display additional context-sensitive navigation information, such as clustered page navigation. For example:

  <asp:ContentPlaceHolder runat="server" id="SideBarPlaceHolder">

  Additional required elements in master pages that inherit the TemplateGalleryMasterPageBase class

  If the master page is inheriting the Asi.Web.UI.TemplateGalleryMasterPageBase class, then to provide support for a Home page that uses a different page layout from all the interior pages of the site you must also include the following elements:

- The DIV that is the immediate child of the form element must contain an asp:Panel element with id="HomePageContent". This asp:Panel element must in turn contain an asp:ContentPlaceHolder element with an id attribute of HomePageBody. This set of elements provides support for a Home Page that uses a different layout from the interior pages. For example:

  <asp:Panel ID="HomePageContent" runat="server">

  <asp:ContentPlaceHolder ID="HomePageBody" runat="server" />

  </asp:Panel>

- The script element should include the following code:

```
<script language="C#" runat="server">
override protected void EnsureContentAreas()
{
  HomepageContentAreas = new Sys-
tem.Collections.Generic.List<ContentTemplateArea>(
    new ContentTemplateArea[]
    {
      HomepageContentArea1,
      HomepageContentArea2,
      HomepageContentArea3,
      // List all homepage content areas here
    });
  InteriorContentAreas = new System.Collections.Generic.List<ContentTemplateArea>(
    new ContentTemplateArea[]
    {
      ContentArea1,
      ContentArea2,
      ContentArea3,
      // List all non-homepage content areas here
    });
}
override protected SiteMapNode GetStartingNode()
{
```

```
  return Secondary.GetStartingNode();
}
override protected SiteMapNode GetCurrentNode()
{
  return Secondary.GetCurrentNode();
}
// Remove this if you omit the login/logout control.
protected void LoginStatus1_OnLoggedOut(object sender, EventArgs e)
{
  Asi.Web.Security.RevokeAppContext(HttpContext.Current);
  if (Page is Asi.Web.UI.DisplayPageBase && ((Asi.We-
b.UI.DisplayPageBase)Page).iMISWebsite != null)
    Response.Redirect(((Asi.Web.UI.DisplayPageBase)Page).iMISWebsite.WebsiteLink,
true);
  else
    Response.Redirect(System.Web.Security.FormsAuthentication.DefaultUrl, true);
}
</script>
```

To add content areas

If your master page is replacing a default Sample Site master page, you must provide controls to display the content designated for content areas in the template's Home and interior pages. You do this by adding the following element to the master page wherever you want the content area to appear:

<asiweb:ContentTemplateArea id="ContentArea1" TemplateAreaName="ContentArea1" runat="server" />

The id attribute is not used by iMIS, so it can be any value. The TemplateAreaName attribute indicates which content record to display in this content area. The value you specify must match the name of a content record located in the site's special ContentAreas content folder (@/[WebsiteName]/ContentAreas by default, in the Content Designer content folder hierarchy).

To enable home page content layouts in master pages

If you want to use content layouts in your template master page, you must enable a property. You do this by adding the following markup to the content areas for the master page:

1. Find this control markup in the page:

   <asiweb:ContentTemplateArea

2. Add the following property setter to that control:

   HonorContentRecordLayout="true"

3. Repeat for each content area that you want to honor the layout. The resulting line should appear:

   <asiweb:ContentTemplateArea id="HomepageContentArea2" templateareaname="HomepageContentArea2" HonorContentRecordLayout="true" runat="server" />

To add the top bar controls

The top bar controls comprise the Sign In / Sign Out link and the icon that toggles Surf-to-Edit mode on and off. You can place these controls anywhere on the page.

- The control for the Sign In / Sign Out link must be defined with the following asp:LoginStatus element:

  <asp:LoginStatus ID="LoginStatus1" runat="server" LoginText="Log On" LogoutText="Log Off"

AccessKey="l" OnLoggedOut="LoginStatus1_OnLoggedOut" CssClass="LoginStyles" />

- The control for the icon that toggles Surf-to-Edit mode must be defined with the following asp:ContentPlaceHolder element:

  <asp:ContentPlaceHolder ID="AuxiliaryNavigationSupplementalContent" runat="server">

  </asp:ContentPlaceHolder>

  To add a browser session keep-alive control

  The browser session keep-alive control forces a user's session and logon credentials to remain active as long as they keep the browser open, which prevents them from being required to re-authenticate to IIS if they do not use the site for an extended period of time. This control is defined with a pair of elements:

  <asp:Label ID="KeepAliveTarget" runat="server" Text=" " />

  <asiweb:KeepAliveExtender ID="KeepAliveControl" runat="server" TargetControlID="KeepAliveTarget" />

  These elements might be located in the same DIV that contains the Auxiliary navigation area, but there is nothing that requires these elements to be located there.

  To add a basic search control

  Define a DIV element to be used as a container for the search form control. This DIV element must contain the following asiweb:SimpleSearchField element:

  <asiweb:SimpleSearchField ID="SearchField" runat="server" AdvancedLinkVisible="false"

  ButtonCssClass="SearchButton" InputCssClass="Watermarked" />

  More about the AdvancedLinkVisible attribute:

- (recommended) Leave this attribute set to false. The preferred method for creating advanced search forms is to create a single AdvancedSearch iPart in a content record

that is the target of a navigation item with Navigation Link Text such as Advanced Search.

- If you set this attribute to true and add a SearchTargetUrl attribute (for example, SearchTargetUrl="~/MyAdvancedSearch.aspx"), the basic search control in your site will include an Advanced Search link, which will display the target .aspx page. This technique lets you use a hand-built advanced search page for the site.

  Tip: You can also modify the basic search control by adding additional attributes not shown in the preceding code sample.

  To add the page task controls

  The page task controls comprise a set of three icons that enable the user to display a printable version of the page, display a text-only version of the page, or to email the page's URL to a friend. These are typically located at the bottom left of each page in the Sample Sites.

  Define a DIV element to be used as a container for the page task controls. This DIV element must contain the following asp:Panel element:

  <asp:Panel ID="PageTasksPanel" runat="server" CssClass="PageTasksPanel NotPrinted">

  <asp:ContentPlaceHolder ID="TemplatePageTasks" runat="server">

  </asp:ContentPlaceHolder>

  </asp:Panel>

  Troubleshooting

- You must have developed your hand-built master pages and themes in accordance with ASP.NET best practices and requirements.
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.

- The root of all file paths used in the following sections is denoted by ~, and corresponds to the root of the physical path for each IIS application or IIS website used for hosting iMIS sites. For example, in a Complete installation of iMIS where the iMIS application is used for hosting iMIS sites, the default physical path is C:\Program Files\ASI\iMIS\Net, so the Net folder is the root (~).

Defining custom iParts as content types

To define iParts

You define an iPart by defining its supporting content type. When you save the definition of the content type, the new iPart appears in the Content Gallery for use by all people who perform web content authoring. You can also transport and deploy your iPart using the Package Installer.

Go to RiSE > Maintenance > Content Types:

Do one of the following:

- Select New > Content Type to create a new content type.
- Select a content type and then click Edit to change an existing content type.
- Select a content type and then select Organize > Delete to delete a content type.

Note: When specifying paths to controls, be sure to use root-relative URLs with forward slashes (/) for the segment delimiters. Example: ~/CustomControls/myControl.ascx

If you want to use a custom control without adding it to content types, then skip the previous steps and go straight to editing or creating your content record:

Go to RiSE > Content Designer > Manage content:

1. Do one of the following:

- Select New > Website Content.
- Select a content record and then click Edit.

2. Click add content and use the Or, enter a path to a web user control field within the Content Gallery.

   This allows implementers to add enhancements to iMIS or your iMIS sites in an ad hoc manner. This field applies only to one-time use iParts. For multiple-use iParts, you must define the content type.

   To add a single-use control, use the Or, enter a path to a web user control field to add a custom iPart in an ad hoc manner. You must place the iPart control (the .ascx file) somewhere in the virtual directory structure beneath the iMIS application in IIS and then specify the relative path to the control in this field. For example, entering ~/TestWebUserControl.ascx would add the TestWebUserControl found in C:\Program Files\ASI\iMIS\net\ on the iMIS application server.

   Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- You must be familiar with ASP.NET development concepts and techniques, especially those related to creating user controls and data contracts, and creating and compiling classes.
- Ensure that the custom user controls that are used for both your simple and complex iParts are placed in the same relative folder beneath the root (~) of the physical path for all IIS applications and IIS websites that host your iMIS sites. Make note of the relative URL to this folder (such as ~/CustomControls), because you must specify this value when defining iParts.
- If you are defining complex iParts, you must also ensure that the class libraries containing the custom classes that are used for the corresponding content type are placed in the bin folder beneath the root of the physical path for all IIS applications and IIS websites that host your iMIS sites. Make note of the relative URL to this folder (such as ~/bin), because you must specify this value when defining complex iParts.

Copying a new class library to the bin folder will cause each server's worker process to be recycled, so you should generally perform this task during scheduled maintenance or other downtime.

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

Simple versus complex iParts

Simple iParts have no custom configuration and are linked to only a single ASP.NET user control. iMIS content management displays a basic editor when users select a simple iPart from the Content gallery. You cannot customize how simple iParts are rendered or published, but you can expose properties of the user control in this basic editor by using the Personalizable and WebBrowsable attributes (and optionally, the WebDisplayName and WebDescription attributes too) in the code for the user control. For example:

```
[Personalizable(PersonalizationScope.User)]

[WebBrowsable()]

[WebDisplayName("Document System Path")]

[WebDescription("The full Document System path (e.g., starting with $/) to

   the query or folder of queries to use to find the desired information.

   Used to find information by Query.")]

public string DocumentPath

{

  get

  {

    ...
```

```
  }
  set
  {
    ...
  }
}
```

Complex iParts can be controlled in how they are configured, rendered, and published. All of the default iParts in the iMIS content management environment are complex iParts.

Defining navigation areas and breadcrumb areas

Caution! The four default navigation areas provided with iMIS content management (Primary, Secondary, Auxiliary, and Footer) are used by iMIS. If you delete these navigation areas or modify their properties, you might adversely affect the normal functioning of iMIS. If you need a different navigation behavior for an iMIS site, always create new navigation areas for the site, and then modify the site's master page to use the new navigation areas.

To specify which navigation areas to use in a site

Do the following to specify the navigation areas to use in a site.

Go to RiSE > Site Designer > Manage websites:

1. Select a website.
2. Click Edit.
3. (Navigation Areas tab) Select the checkboxes for each navigation area that you want to be available for use by navigation items that you define in the sitemap for this site.
4. Click Save.

If you clear any checkboxes that were previously selected in this section, all navigation items that are currently defined to be displayed in that navigation area will still appear in

that navigation area in rendered site pages. This happens because the master page for the site still contains a framework for the navigation area, and currently published navigation items still contain the properties that make them be displayed in the navigation area that you no longer want to be available for use in this site. The navigation area will not completely disappear from your rendered site until you edit and save every existing navigation item in the site's sitemap.

To delete navigation areas from the entire system

Caution! You must not delete or change the properties of the four default navigation areas provided with iMIS content management: Primary, Secondary, Auxiliary, and Footer. These navigation areas are also used by iMIS. If you want to remove one of these default navigation areas from a site, it is safer to do so by removing the corresponding control from the site's master page.

You should avoid deleting a navigation area unless you are very sure of the ramifications, because doing so will remove the navigation area from the entire system, which affects all iMIS sites in the system.

Do the following to delete navigation areas in a site.

Go to RiSE > Site Designer > Manage websites:

1. Select any website in the list as they all share the same list of available navigation areas.
2. Click Edit.
3. (Navigation Areas tab) Click the Create or Edit Navigation Panes icon ( ).
4. Click delete next to the navigation item that you want to delete from the system.

   When you delete a navigation area, all navigation items that are currently defined to be displayed in that navigation area will still appear in that navigation area in rendered site pages, because the master page for the site still contains a framework for the navigation area, and published navigation items still contain the properties that make them be displayed in the deleted navigation area. The navigation area will not completely disappear

from all of your rendered sites until you edit and save every navigation item in the system that currently uses that navigation area.

To edit the properties of existing navigation areas

Caution! You must not delete or change the properties of the four default navigation areas provided with iMIS content management: Primary, Secondary, Auxiliary, and Footer. These navigation areas are also used by iMIS. If you want to change the behavior of one of these default navigation areas, it is safer to do so by creating an entirely new navigation area with the desired properties and then modifying the controls on the site's master page to use these new replacement navigation areas.

The properties of a navigation area are applied equally across all sites that use the navigation area. You must consider this effect when changing the properties of a navigation area.

Do the following to edit the properties of an existing navigation area.

Go to RiSE > Site Designer > Manage websites:

1. Select any website in the list as they all share the same list of available navigation areas.
2. Click Edit.
3. (Navigation Areas tab) Click the Create or Edit Navigation Panes icon (✏).
4. Click select next to the navigation item that you want to delete from the system.

To add new navigation areas to the system and to master pages

Because the properties of a navigation area are applied equally across all sites that use the navigation area, the way that you make a certain navigation area behave differently from site to site is by creating new navigation areas that are each used in the same general area of each site's master page, but that have different properties from each other. This process requires you to first add the new navigation item to the system, and then to modify the desired section of each site's master page to use the appropriate navigation area.

For example, you might want the Primary navigation area in two different sites to behave differently from each other. You would create a new navigation area named something like Primary2, making its properties slightly different from the Primary navigation area. No change would be needed to the master pages for sites that use the Primary navigation area. But the sites that you specify to instead use Primary2 would need to have their master pages edited to use the Primary2 navigation area in the section where they were previously coded to use the Primary navigation area.

Do the following to add new navigation areas to the system and to the master pages.

Go to RiSE > Site Designer > Manage websites:

1. Select any website in the list as they all share the same list of available navigation areas.
2. Click Edit.
3. (Navigation Areas tab) Click the Create or Edit Navigation Panes icon (✏).
4. Click add near the top of the window.
5. Define the properties of the new navigation area and click Save.
6. Click select next to the newly-created navigation area.
7. Note the displayed Navigation Pane Code and Name.

In the master page for sites that will use this new navigation area, you can either modify existing navigation-handling controls to use the new navigation area, or you can add entirely new navigation-handling controls to the already existing set in the master page.

- To modify an existing navigation-handling control, replace the value of the control's ID attribute with the Name that you recorded in Step 7, and replace the value of the control's NavigationPaneCode attribute with the Navigation Pane Code that you recorded in Step 7. The default navigation-handling controls in the master page are:
- For the Primary navigation area – <asi:PageNav>
- For the Secondary navigation area – <asi:PageSubNav>
- For the Auxiliary navigation area – <asiweb:NavigationList> (ID="Auxiliary")

- For the Footer navigation area – <asiweb:NavigationList> (ID="Foot")
- To add a new navigation-handling control, copy either the Auxiliary or Footer control and paste it into an appropriate section of the master page. Then replace the value of the control's ID attribute with the Name that you recorded in Step 7, and replace the value of the control's NavigationPaneCode attribute with the Navigation Pane Code that you recorded in Step 7.

  To add a breadcrumb area to master pages

  To add a breadcrumb-handling control to a hand-built master page, copy the following code from any ASI-developed master page (all ASI-developed master pages contain a breadcrumb area) into an appropriate DIV of the master page.

  Note: The administrative views do not support breadcrumb-handling controls.

  Note: The default ASP.NET breadcrumb control is not recommended for the iMIS content management environment. The following compatible breadcrumb control should be used in the default ASP.NET breadcrumb's place, which enables the navigation item's Title and its corresponding Breadcrumb Name that is displayed in the breadcrumb area to be different from each other.

```
<asp:Panel ID="TaskPanel" runat="server">
  <asp:Label ID="TaskDescription" runat="server" Visible="false"></asp:Label>
  <asiweb:SiteMapPath ID="BreadCrumb" runat="server" SiteMapPro-
vider="AsiSiteMapProvider">
    <NodeTemplate>
      <asp:HyperLink ID="NodeLink" runat="server" NavigateUrl='<%# Eval("Url") %>'
        Text='<%# Eval("NavigationHierarchy.Navigation.BreadCrumbName") %>'
        CssClass="BreadCrumbLink">
      </asp:HyperLink>
    </NodeTemplate>
```

```
    <CurrentNodeTemplate>
      <asp:Label ID="CurrentNodeLabel"
        runat="server"
        Text='<%# Eval("NavigationHierarchy.Navigation.BreadCrumbName") %>'>
      </asp:Label>
    </CurrentNodeTemplate>
  </asiweb:SiteMapPath>
</asp:Panel>
```

Troubleshooting

- You must be a member of at least one content authority group (CAG).
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- If you are planning to add an entirely new navigation area to your system (instead of reusing one of your currently defined navigation areas), ensure that you have not already exceeded the system limit of 30 uniquely defined navigation areas. Four default navigation areas (Primary, Secondary, Auxiliary, and Footer) are predefined in iMIS.
- You must be familiar with ASP.NET development techniques and the design and construction of ASP.NET master pages.

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

  Tips

  The following information can be helpful when defining navigation areas and breadcrumb areas.

How the automated contents of navigation areas are determined

A combination of user-defined settings in Site Designer and the choice of three possible ASI-developed controls used in a site's master page determine what is displayed in each navigation area defined in the master page.

When you define navigation items in Site Designer, there are three properties you specify that relate to the hierarchy of the site's sitemap:

- Static Display Levels
- Dynamic Display Levels
- Starting Level

To understand the interplay of these three properties, see the Navigation Areas section of Fields: websites. In short, these properties are only defaults that are subsequently over-ridden to varying degrees by the type of control you use in the master page to render the navigation areas.

In the master pages:

- Primary navigation (if present) is rendered either by the asi:PageNav control (for older templates) or the asi:PageNavR control (for newer templates), which renders a larger set of horizontal, single-level, tab-style links above the main content area.
- Secondary navigation (if present) is rendered by the asi:PageSubNav control, which renders a vertical set of expandable, multi-level links at the left or right side of the main content area.
- Auxiliary and Footer navigation (if present) are both rendered by the asi-web:NavigationList control, which renders a compact set of horizontal links, for place-ment near the top and bottom of the entire browser window.

In your own hand-built master pages, you can use any of these three controls to render any of the navigation areas used in the site. Which control you should use depends on the results you want to achieve, because each control overrides the default display level properties defined in each navigation area in different ways:

- asi:PageNav and asi:PageNavR ignore the Starting Level and the Static Display Levels defined in the associated navigation area. It is hard-coded to start the first level of the sitemap hierarchy below the sitemap root (~), and then to display the number of additional sitemap levels defined in the Dynamic Display Levels of the associated navigation area.

  For example, the default Primary navigation area is defined with a value of 0 for its Dynamic Display Levels. As a result, the Primary navigation area displays only the first level of the sitemap hierarchy below the sitemap root.

- asi:PageSubNav ignores the Starting Level and the Dynamic Display Levels defined in the associated navigation area. This control is hard-coded to start at the second level of the sitemap hierarchy below the sitemap root (~), and then to display the number of additional sitemap levels defined in the Static Display Levels of the associated navigation item.

  For example, the default Secondary navigation area is defined with a value of 4 for its Static Display Levels. As a result, the Secondary navigation area displays the second, third, fourth, and fifth levels of the sitemap hierarchy below the sitemap root. The default rendering behavior is to collapse all but the first of these four levels unless a descendant navigation item in the specified range is flagged to be expanded by default (with the This navigation item is expanded by default checkbox in the Options section).

  You can change the starting level of the sitemap hierarchy displayed by this control by changing the value of the StartingNodeOffset attribute. The offset that you specify in this attribute must be the sitemap hierarchy level minus 1. So, StartingNodeOffset="1" makes the control start at the second level of the sitemap hierarchy, but in the 1504 template, StartingNodeOffset="0" makes the control start at the first level.

- asiweb:NavigationList ignores the Starting Level, Static Display Levels, and Dynamic Display Levels. It is hard-coded to display only those navigation items that are flagged to be always shown in a navigation area that is rendered by this control (with the Show in the following navigation areas checkboxes in the Options section).

For example, the default Auxiliary and Footer navigation areas are rendered by this control. Only those navigation items in which Auxiliary or Footer checkboxes (or both) are selected beneath Show in the following navigation areas actually appear in the rendered output of this control.

The special primary footer

Master pages might insert a special primary footer that is not actually controlled by the Footer navigation area defined in iMIS content management. This can cause some unexpected results when you designate navigation items for use in the Footer navigation area, because the navigation items that you designate appear only in the bottom row of footer links.

What appears to be a single set of footer links spanning two rows actually comprises two separate sets that are rendered by two different controls:

- The top row of footer links is created by an asiweb:NavigationList control that is hard-coded with attributes to duplicate the content of only the first level of links shown in the Primary navigation area.
- The bottom row of footer links is created by an asiweb:NavigationList control that is associated with the Footer navigation area defined in the system.

You can duplicate this "primary footer" technique in your own hand-built master pages by pasting the following two elements directly above the one that renders the Footer navigation area:

```
<asp:SiteMapDataSource ID="SiteMapDataSource1" runat="server" />

<asiweb:NavigationList ID="PrimaryFoot" runat="server" NavigationPaneCode="1"
  UseGenericMenu="true" StartFromRootNode="true" SelectDefaultNode="false"
  SiteMapDataSourceID="SiteMapDataSource1" />
```

Extending the default search behavior

To replace the default search engine

Microsoft Index Server is the default search engine for iMIS sites. iMIS content management interacts with Microsoft Index Server by using the ASP.NET 2.0 provider model, so the default search provider (ImisSearchProvider) can be replaced with a custom search provider that is designed to use another search engine.

Refer to iMIS Community to learn techniques for replacing the default ImisSearchProvider provider with a custom search provider. You must be familiar with ASP.NET development concepts and techniques and you must be familiar with the ASP.NET 2.0 provider model.

If you replace the default search engine, you probably must also write corresponding index renderers to replace the default index renderers used by the iMIS rendering engine.

To add ranking values to search results

Search results from the basic search control and from the advanced search pages that you create by using AdvancedSearch iParts are listed in descending order based on the ranking score given by Microsoft Index Server to each result. However, the default behavior for search results does not display the actual score for each item.

You can make the ranking score visible for each search result by adding the following key to the <SystemParams> declaration of the web.config file in the root of the physical path for your IIS applications and IIS websites that host your iMIS sites.

<add key="Search.DisplayRankValueInResults" value="true"/>

To tailor the basic search control

The basic search control that appears on most site pages can be configured to display different styles of prompt text and to display the specific prompt text that you prefer. To modify the default settings, edit the master page for an iMIS site and locate the following element:

<asiweb:SimpleSearchField ID="SearchField" runat="server" AdvancedLinkVisible="false"

ButtonCssClass="SearchButton" InputCssClass="Watermarked" />

Add the following three attributes to this element declaration to modify the prompt style and prompt text:

- PromptType
- PromptType="None" – Prompt text for the search control is not displayed.
- PromptType="Label" – Prompt text appears as a label near the search control, positioned above, or beneath, or to the left, or to the right of the search control as specified by the PromptPosition attribute.
- PromptType="Watermark" – Prompt text appears as watermark text inside the search control itself.
- PromptPosition (optional if PromptType="Label": if you omit this attribute, the default value is "Left")
- PromptPosition="Bottom"
- PromptPosition="Left"
- PromptPosition="Right"
- PromptPosition="Top"
- PromptText (optional if PromptType="Label" or "Watermark": if you omit this attribute, the default value is "Search")
- PromptText="[any string]"

Troubleshooting

- You must have administrative access to Internet Information Services (IIS) and the entire file system on all servers that you use for hosting iMIS sites.

Extending the default content and index renderers

To extend the default content and index renderers

The iMIS content management rendering engine provides an extensible method for applying several rendering steps when a content record is published. Several default content

renderers control how the ASI-provided iParts are visually rendered in supported web browsers. Several default index renderers control how each content type is indexed for use by the default search engine.

The rendering steps applied to a complex iPart are controlled by the IContentType class that is defined in the content type that supports the iPart. You can replace the default rendering steps by creating a custom IContentType class and specifying that class in the content type that supports a specific iPart.

The custom IContentType class must inherit the base IContentType class provided with iMIS content management (Asi.Business.ContentManagement.ContentType.ContentTypeBase). You then override one or more of the following methods that are defined in the base class to achieve the content and index rendering results that you desire:

- To change the content rendering steps, override the RenderForPublish or RenderForDisplay methods (or both).
- To change the index rendering steps, override the RenderForSearch method.

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- You must be familiar with ASP.NET development concepts and techniques, especially those related to creating user controls and data contracts, and creating and compiling classes.

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

Tip: ContentFile types that are indexed for search

The files that you specify for the download link in a ContentFile iPart can be indexed by Microsoft Index Server if you have a corresponding iFilter installed on every server that is hosting your iMIS sites.

Adjusting the site keep-alive service

The site keep-alive service is initiated at regular intervals by the publishing service associated with an iMIS site. The keep-alive service automatically pre-loads all your iMIS sites in IIS if IIS is restarted for any reason. Without this keep-alive service, the first browser to request a URL from any of the iMIS sites after an IIS restart would experience a long initial load time.

You can adjust the default settings of the site keep-alive service by editing the following keys in the <appSettings> element in the configuration file PublishService.exe.config, which is located in the bin folder beneath the root of the physical path for the IIS application or IIS website that hosts iMIS sites:

- The value of the following key should be true to enable the keep-alive pings from the publishing service, or set to false to disable the keep-alive pings.

  <add key="EnableSiteService" value="true" />

- The value of the following key should be the interval, in minutes, at which you want the keep-alive control to be pinged by the publishing service:

  <add key="PingInterval" value="15"/>

- The value of the following key should be empty if the keep-alive processing for this publishing service should affect only the IIS application or IIS website for which this publishing service was originally installed.

  <add key="AdditionalUrls" value=""/>

  However, you might prefer to consolidate the keep-alive processing for all of your iMIS sites (and even the various views of iMIS) onto one specific publishing service in your production environment to centralize your keep-alive configuration and logging. To do this, you would instead specify a comma-delimited list of the absolute URLs that resolve to the

IIS applications and IIS websites that host the iMIS sites that you want to be pinged by this publishing service. For example, the following value would ping the following additional IIS applications as well as the one for which this publishing service was installed: the iMIS application on your production iMIS server, and an iMIS site on an external web server.

<add key="AdditionalUrls" value="http://server1/iMIS,http://server3/WCMsite1"/>

Troubleshooting

- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.

Continuum Console

Your Administrative Console includes Continuum, offering quick access to tools that staff need most frequently for producing a wide range of reports.

Depending on your license keys, some areas might not be listed in your Administrative Continuum. The license keys needed for each area are:

- Membership Reports (MEMBERSHIP or DUES or EDUES or CERT or CERTIFICATION or REFERRAL)
- Events and Order Reports (MEETINGS or WMEET or W_ORDERS or ORDER or CASH)
- Fundraising Reports (FUNDR or FUNDRAISING)
- Commerce and Customer Service (CASH or SERVCEN)

Note: The current reporting tool in iMIS is Microsoft SQL Server Reporting Services (SSRS). You can access Microsoft SQL Server Reporting Services reports and queries through the RiSE tool on the Staff or Member web sites. However, you can use Continuum from the Administrative Console to access older Omnis and Crystal reports.

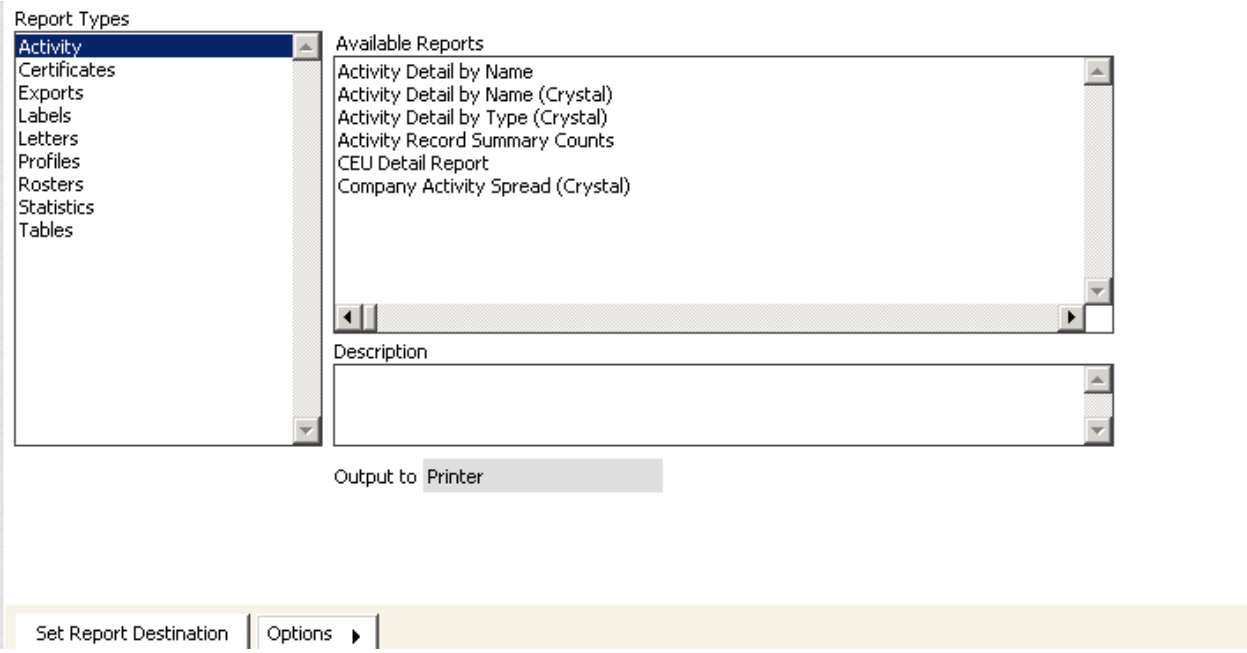
Note: In order to access Continuum, Staff users must be assigned to the Reporting Users group. To assign users to groups, go to System Admin > Users; in the User Information section, click add group, select the Reporting option, and click OK.

Membership Reports

When you select Membership Reports, the standard iMIS report window displays. The window offers you a variety of printed output, including Rosters, Statistics, and Activity reports. The window is identical to that of every iMIS module. It gives you access to many categories of reports and options, from which you select specific formats and output. It also lets you choose the printer with Set Report Destination or other output device, and you can often vary the sort order and control the inclusion of providers and records, as well as other report-related items.

Contact Reports

Contact reports window



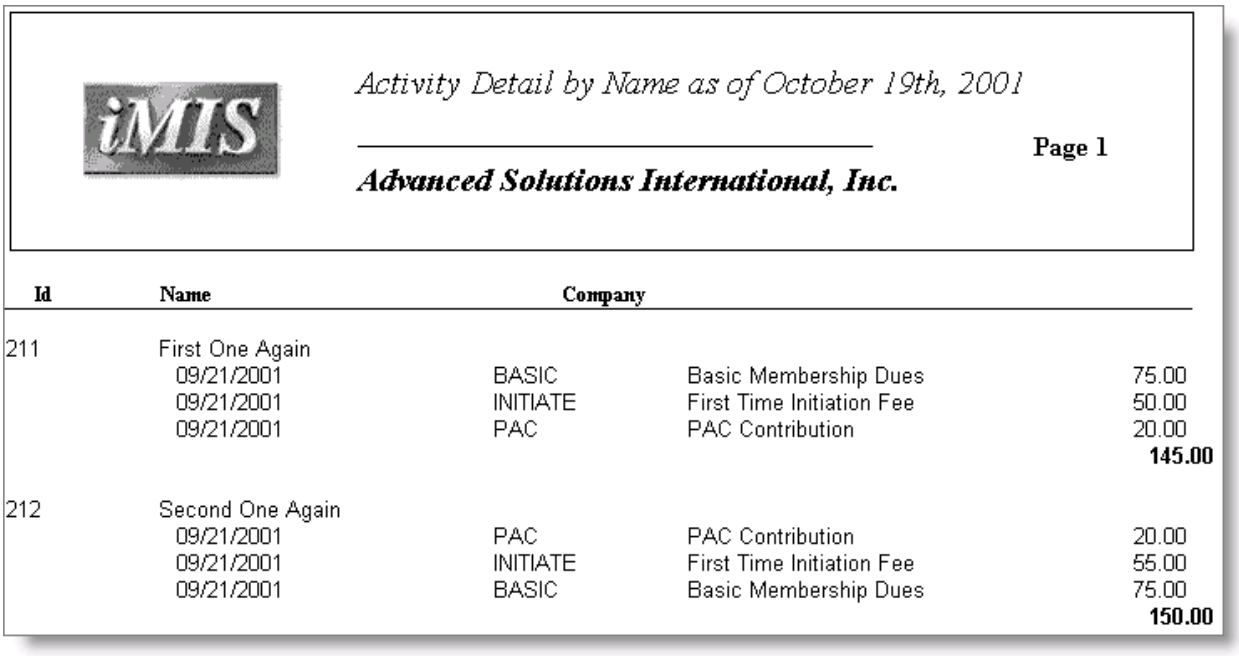
Admin Console: Continuum > Membership Reports > Contact reports

Desktop: Customers > Generate reports

Sample Contact Reports

Activity Detail report

The Activity Detail reports can provide information by name or by type. The Activity Detail by Name report lists activities by individual with dates and totals. The Activity Detail by Type report lists activities by type and product with totals.



Activity Detail by Name as of October 19th, 2001

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Advanced Solutions International, Inc.

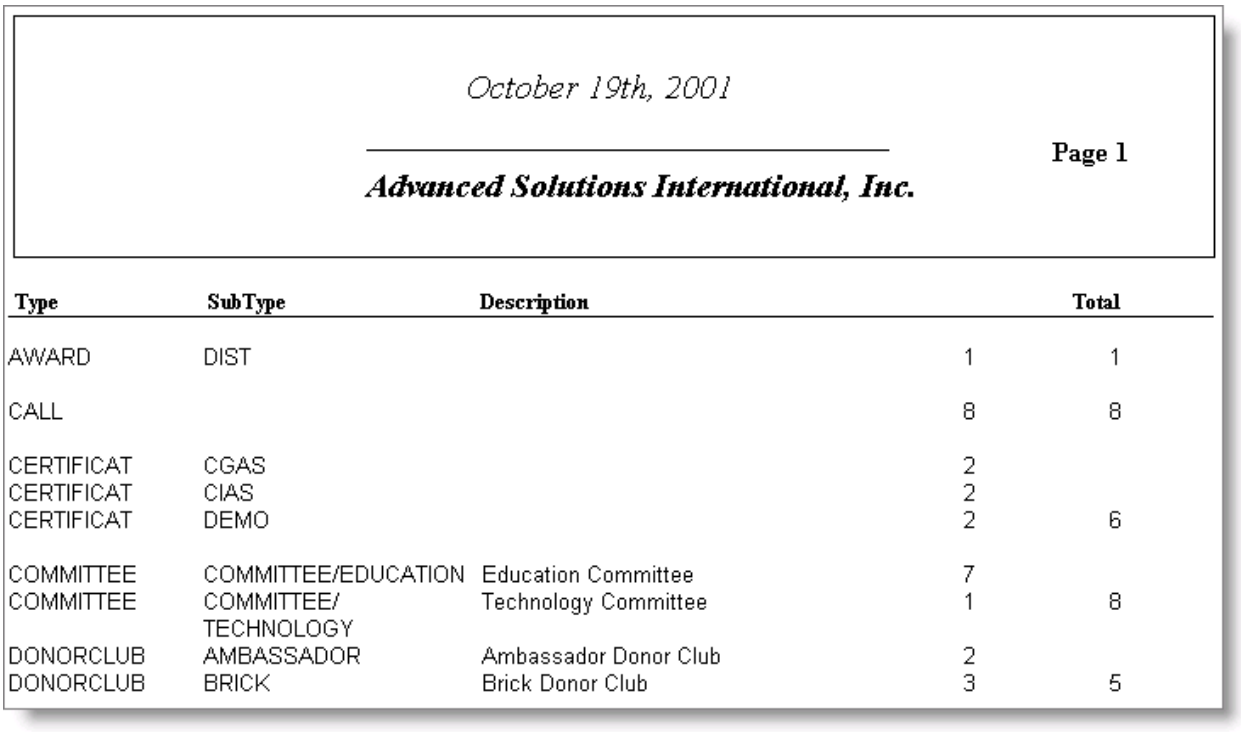
Id	Name	Company		
211	First One Again			
	09/21/2001	BASIC	Basic Membership Dues	75.00
	09/21/2001	INITIATE	First Time Initiation Fee	50.00
	09/21/2001	PAC	PAC Contribution	20.00
				145.00
212	Second One Again			
	09/21/2001	PAC	PAC Contribution	20.00
	09/21/2001	INITIATE	First Time Initiation Fee	55.00
	09/21/2001	BASIC	Basic Membership Dues	75.00
				150.00

Admin Console: Continuum > Membership Reports > Contact reports > Activity

Desktop: Customers > Generate reports > Activity > Activity Detail by Name

Activity Record Summary Counts report

The Activity Record Summary Counts report lists the total number of activity records by activity type and subtype (product).



October 19th, 2001

Page 1

Advanced Solutions International, Inc.

Type	SubType	Description		Total
AWARD	DIST		1	1
CALL			8	8
CERTIFICAT	CGAS		2	
CERTIFICAT	CIAS		2	
CERTIFICAT	DEMO		2	6
COMMITTEE	COMMITTEE/EDUCATION	Education Committee	7	
COMMITTEE	COMMITTEE/ TECHNOLOGY	Technology Committee	1	8
DONORCLUB	AMBASSADOR	Ambassador Donor Club	2	
DONORCLUB	BRICK	Brick Donor Club	3	5

Admin Console: Continuum > Membership Reports > Contact reports > Active Record Summary Counts

Desktop: Customers > Generate reports > Activity > Activity Record Summary Counts

Certificate of Appreciation report

The Certificate of Appreciation report provides a formatted certificate of appreciation for a member or donor.

Admin Console: Continuum > Membership Reports > Certification reports

Desktop: Customers > Generate reports > Certificates > Certificate of Appreciation

Certificate of Membership report

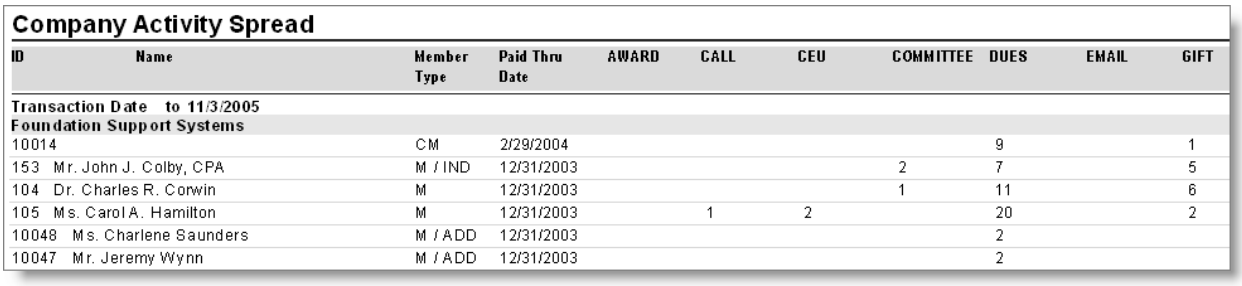
The Certificate of Membership report prints a formatted membership certificate which includes the presentation date and member since information for a member.

Admin Console: Continuum > Membership Reports > Contact reports > Certificates > Certificate of Membership

Desktop: Customers, select Generate reports > Certificates > Certificate of Membership

Company Activity Spread report

The Company Activity Spread report provides a summary of up to seven selected activities for a company and its associated contacts, along with the member type and paid thru date of the associated contacts/members/customers.



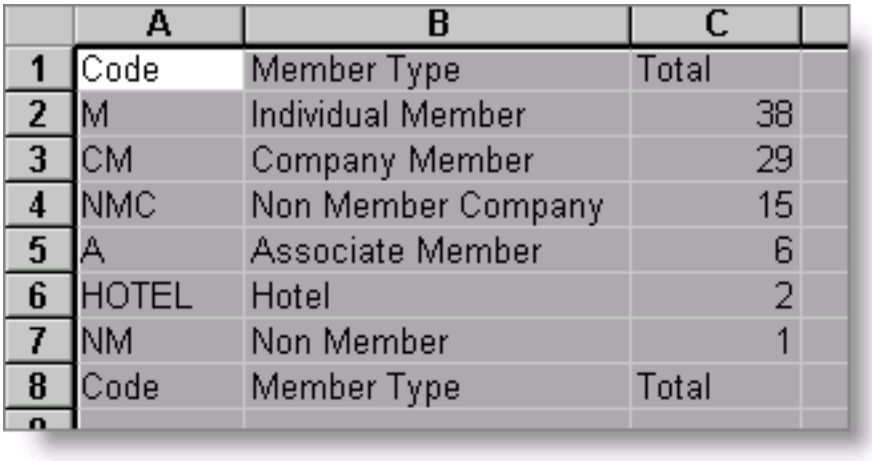
Company Activity Spread

ID	Name	Member Type	Paid Thru Date	AWARD	CALL	CEU	COMMITTEE	DUES	EMAIL	GIFT
Transaction Date to 11/3/2005										
Foundation Support Systems										
10014		CM	2/29/2004					9		1
153	Mr. John J. Colby, CPA	M / IND	12/31/2003				2	7		5
104	Dr. Charles R. Corwin	M	12/31/2003				1	11		6
105	Ms. Carol A. Hamilton	M	12/31/2003		1	2		20		2
10048	Ms. Charlene Saunders	M / ADD	12/31/2003					2		
10047	Mr. Jeremy Wynn	M / ADD	12/31/2003					2		

Admin Console: Continuum > Membership Reports > Contact reports > Activity

Desktop: Customers > Generate Reports > Activity

Count by Member Type spreadsheet report



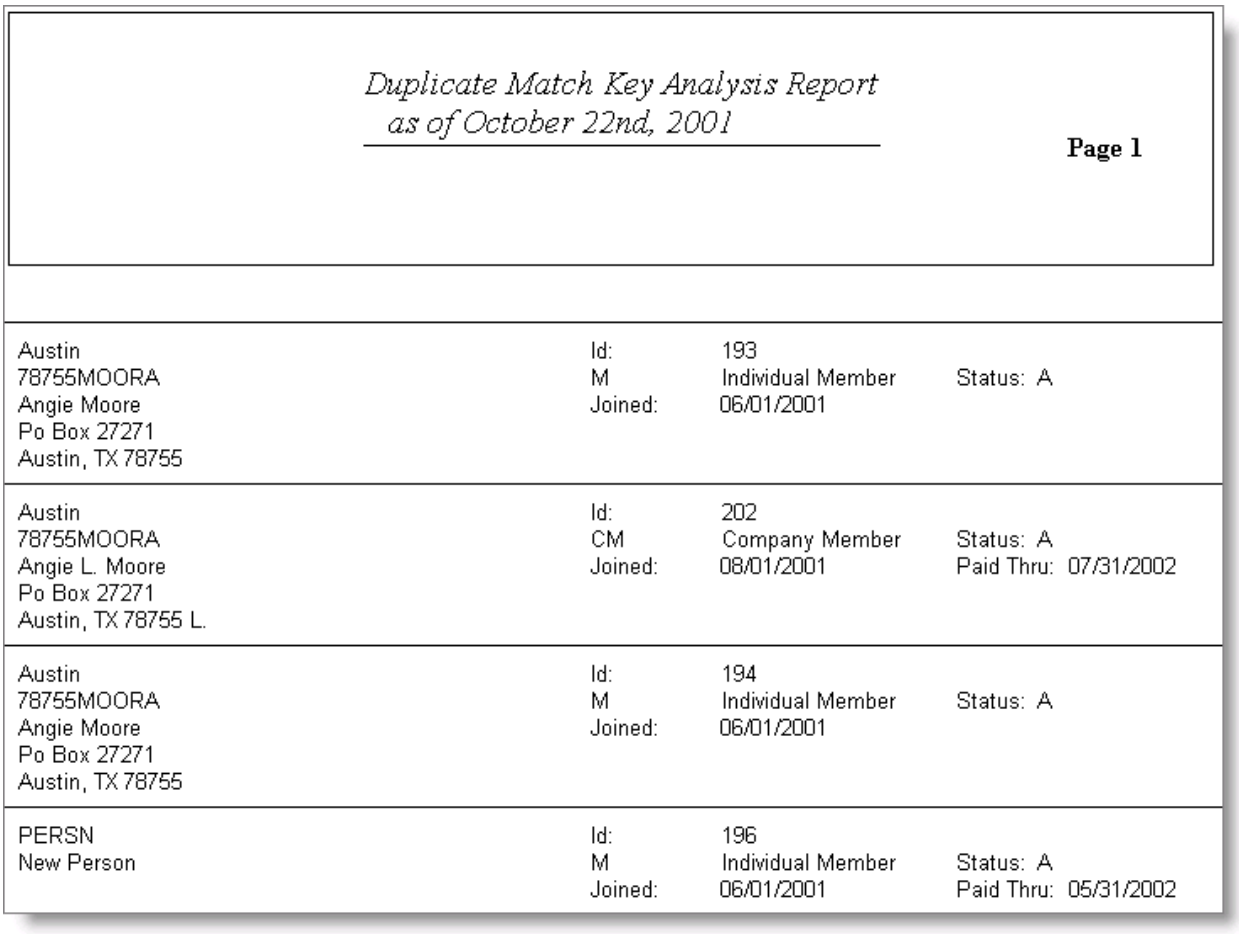
	A	B	C
1	Code	Member Type	Total
2	M	Individual Member	38
3	CM	Company Member	29
4	NMC	Non Member Company	15
5	A	Associate Member	6
6	HOTEL	Hotel	2
7	NM	Non Member	1
8	Code	Member Type	Total

Admin Console: Continuum > Membership Reports > Contact reports > Statistics

Desktop: Customers > Generate Reports > Statistics

Duplicate Match Key Analysis report

This statistical report prints a listing of records with the same duplicate match key.



Duplicate Match Key Analysis Report
as of October 22nd, 2001

Page 1

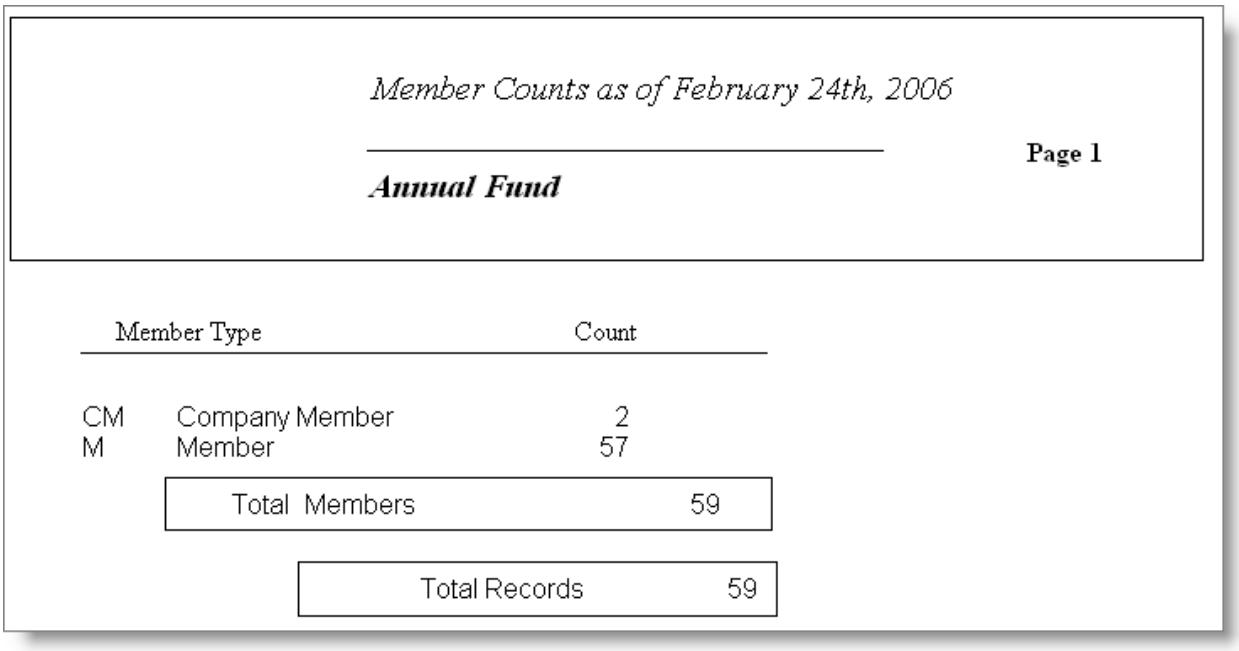
Austin 78755MOORA Angie Moore Po Box 27271 Austin, TX 78755	Id: M Joined:	193 Individual Member 06/01/2001	Status: A
Austin 78755MOORA Angie L. Moore Po Box 27271 Austin, TX 78755 L.	Id: CM Joined:	202 Company Member 08/01/2001	Status: A Paid Thru: 07/31/2002
Austin 78755MOORA Angie Moore Po Box 27271 Austin, TX 78755	Id: M Joined:	194 Individual Member 06/01/2001	Status: A
PERSN New Person	Id: M Joined:	196 Individual Member 06/01/2001	Status: A Paid Thru: 05/31/2002

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Duplicate Match Key Analysis Report

Desktop: Customers > Generate reports > Statistics > Duplicate Match Key Analysis Report

Member/Contact Counts report

The Member Counts reports lists customer counts by Join Year or by Customer type. The report can be filtered by member/contact type, and by member status.



Member Counts as of February 24th, 2006

Page 1

Annual Fund

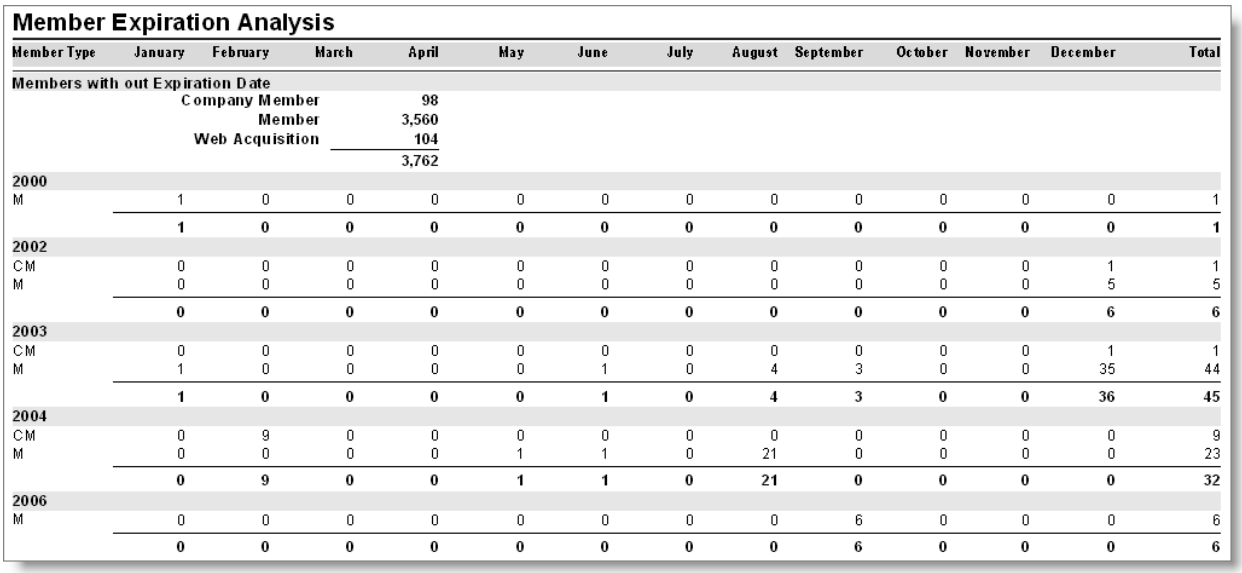
Member Type		Count
CM	Company Member	2
M	Member	57
	Total Members	59
	Total Records	59

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Member/Contact Counts

Desktop: Customers > Generate reports > Statistics > a Member/Contact Counts report

Member Expiration Analysis report

The Member Expiration Analysis report shows the number of expirations by year, by membership type, and by month.



Member Expiration Analysis

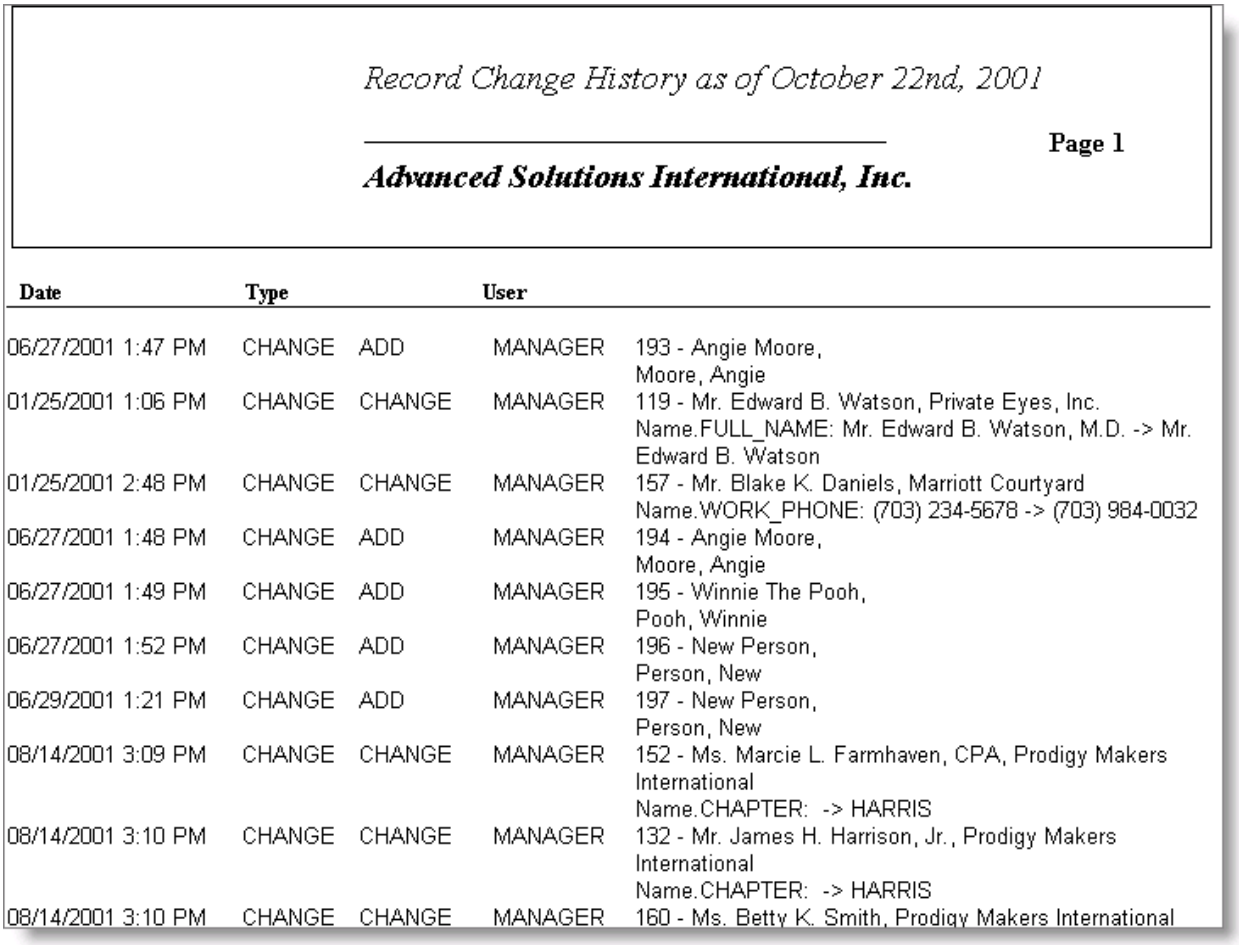
Member Type	January	February	March	April	May	June	July	August	September	October	November	December	Total
Members with out Expiration Date													
Company Member				98									
Member				3,560									
Web Acquisition				104									
				3,762									
2000													
M	1	0	0	0	0	0	0	0	0	0	0	0	1
	1	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**1**
2002													
CM	0	0	0	0	0	0	0	0	0	0	0	1	1
M	0	0	0	0	0	0	0	0	0	0	0	5	5
	0	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**6**	**6**
2003													
CM	0	0	0	0	0	0	0	0	0	0	0	1	1
M	1	0	0	0	0	1	0	4	3	0	0	35	44
	1	**0**	**0**	**0**	**0**	**1**	**0**	**4**	**3**	**0**	**0**	**36**	**45**
2004													
CM	0	9	0	0	0	0	0	0	0	0	0	0	9
M	0	0	0	0	1	1	0	21	0	0	0	0	23
	0	**9**	**0**	**0**	**1**	**1**	**0**	**21**	**0**	**0**	**0**	**0**	**32**
2006													
M	0	0	0	0	0	0	0	0	6	0	0	0	6
	0	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**6**	**0**	**0**	**0**	**6**

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Member Expiration Analysis (Crystal)

Desktop: Customers > Generate reports > Statistics > Member Expiration Analysis (Crystal)

Record Change History report

This report prints the field change history for a given range of dates.



Record Change History as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

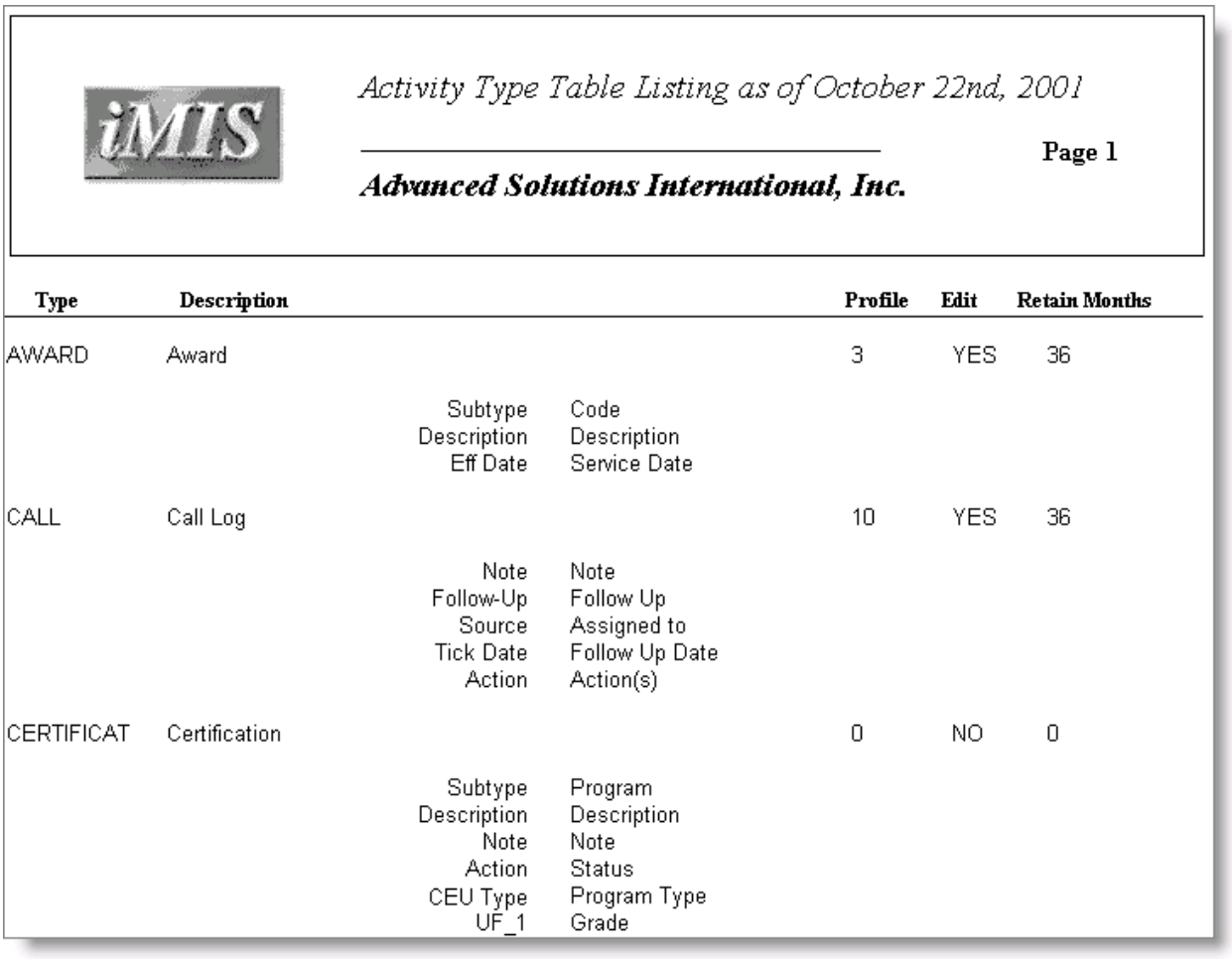
Date	Type		User	
06/27/2001 1:47 PM	CHANGE	ADD	MANAGER	193 - Angie Moore, Moore, Angie
01/25/2001 1:06 PM	CHANGE	CHANGE	MANAGER	119 - Mr. Edward B. Watson, Private Eyes, Inc. Name.FULL_NAME: Mr. Edward B. Watson, M.D. -> Mr. Edward B. Watson
01/25/2001 2:48 PM	CHANGE	CHANGE	MANAGER	157 - Mr. Blake K. Daniels, Marriott Courtyard Name.WORK_PHONE: (703) 234-5678 -> (703) 984-0032
06/27/2001 1:48 PM	CHANGE	ADD	MANAGER	194 - Angie Moore, Moore, Angie
06/27/2001 1:49 PM	CHANGE	ADD	MANAGER	195 - Winnie The Pooh, Pooh, Winnie
06/27/2001 1:52 PM	CHANGE	ADD	MANAGER	196 - New Person, Person, New
06/29/2001 1:21 PM	CHANGE	ADD	MANAGER	197 - New Person, Person, New
08/14/2001 3:09 PM	CHANGE	CHANGE	MANAGER	152 - Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International Name.CHAPTER: -> HARRIS
08/14/2001 3:10 PM	CHANGE	CHANGE	MANAGER	132 - Mr. James H. Harrison, Jr., Prodigy Makers International Name.CHAPTER: -> HARRIS
08/14/2001 3:10 PM	CHANGE	CHANGE	MANAGER	160 - Ms. Betty K. Smith, Prodigy Makers International

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Record/Change History

Desktop: Customers > Generate reports > Statistics > Record Change History

Table Listings report

This report includes a listing of Activity Tables by Chapter name, Committee code, Committee position, and the General/Validation/Expansion table.



Activity Type Table Listing as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Type	Description			Profile	Edit	Retain Months
AWARD	Award			3	YES	36
		Subtype	Code			
		Description	Description			
		Eff Date	Service Date			
CALL	Call Log			10	YES	36
		Note	Note			
		Follow-Up	Follow Up			
		Source	Assigned to			
		Tick Date	Follow Up Date			
		Action	Action(s)			
CERTIFICAT	Certification			0	NO	0
		Subtype	Program			
		Description	Description			
		Note	Note			
		Action	Status			
		CEU Type	Program Type			
		UF_1	Grade			

Admin Console: Continuum > Membership Reports > Contact reports > Tables > Activity Type Table Listing

Desktop: Customers > Generate reports > Tables > Table Listing Report

Hands-on exercise: Clone a report

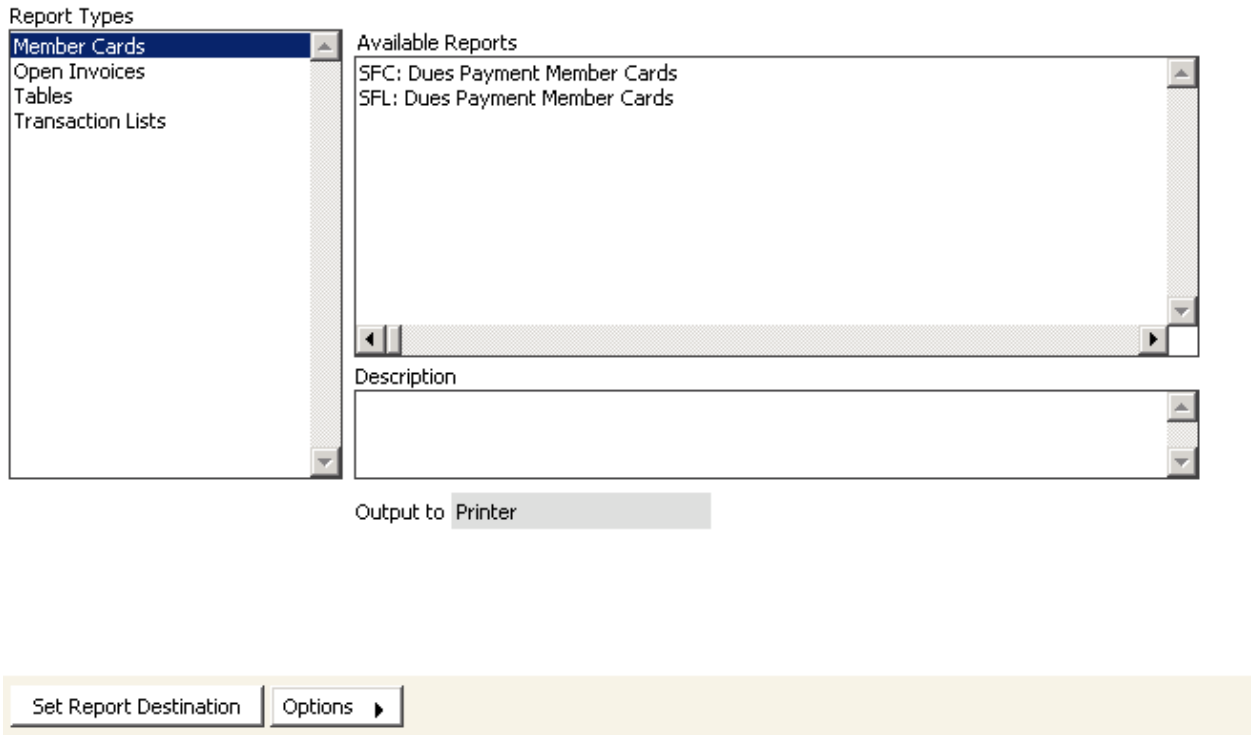
In this exercise, you will create a new report by cloning it from an existing report.

1. Select Utilities > Report Specs to open the Report Specifications window.
2. Select the MEMBERSHIP - Activity - Activity Detail by Name report from the drop-down list.
3. Click Clone.
4. Change the name of the Title to Activity Detail by Name - New.

5. Click Save on the Report Specifications window to display the report you created with the other Standard Reports on the Reports menu.

Billing Reports

Billing reports window



Admin Console: Continuum > Membership Reports > Billing reports

Desktop: Billing > Generate reports

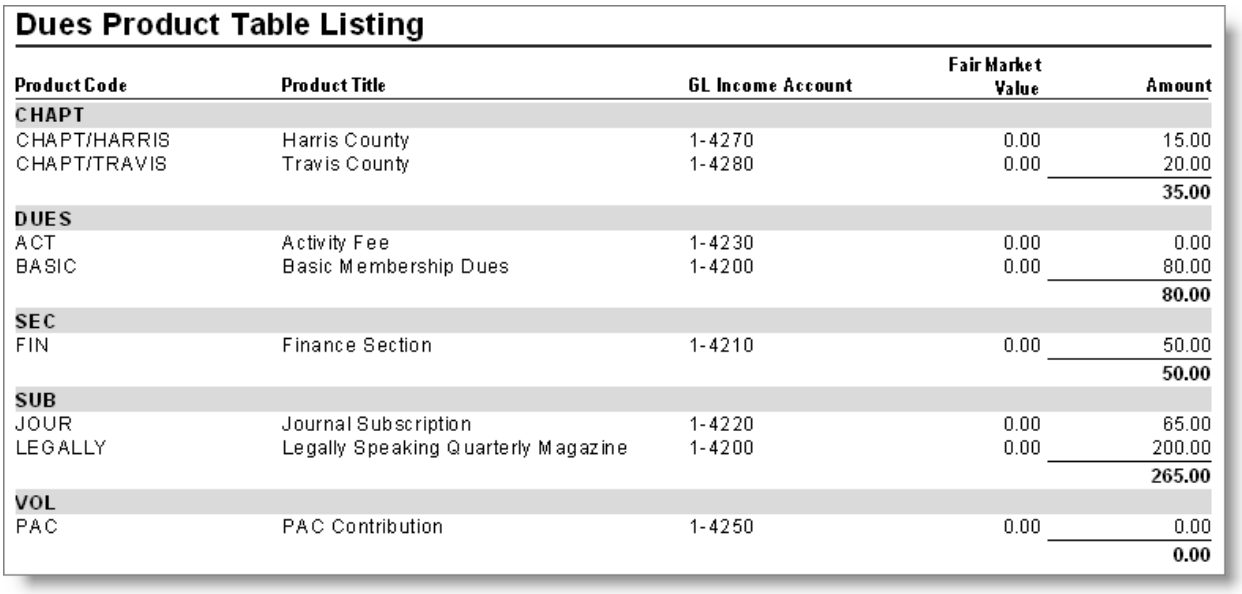
Sample Billing Reports

Dues Product Table Listing report (Crystal)

The Dues Product Table Listing lists all of the records in the Product table whose Product Types are used for dues billing.

Note: This report includes the following Product Types: DUES, CHAPT, SEC, SUB, VOL, MISC.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Dues Product Table Listing

Product Code	Product Title	GL Income Account	Fair Market Value	Amount
CHAPT				
CHAPT/HARRIS	Harris County	1-4270	0.00	15.00
CHAPT/TRAVIS	Travis County	1-4280	0.00	20.00
				35.00
DUES				
ACT	Activity Fee	1-4230	0.00	0.00
BASIC	Basic Membership Dues	1-4200	0.00	80.00
				80.00
SEC				
FIN	Finance Section	1-4210	0.00	50.00
				50.00
SUB				
JOUR	Journal Subscription	1-4220	0.00	65.00
LEGALLY	Legally Speaking Quarterly Magazine	1-4200	0.00	200.00
				265.00
VOL				
PAC	PAC Contribution	1-4250	0.00	0.00
				0.00

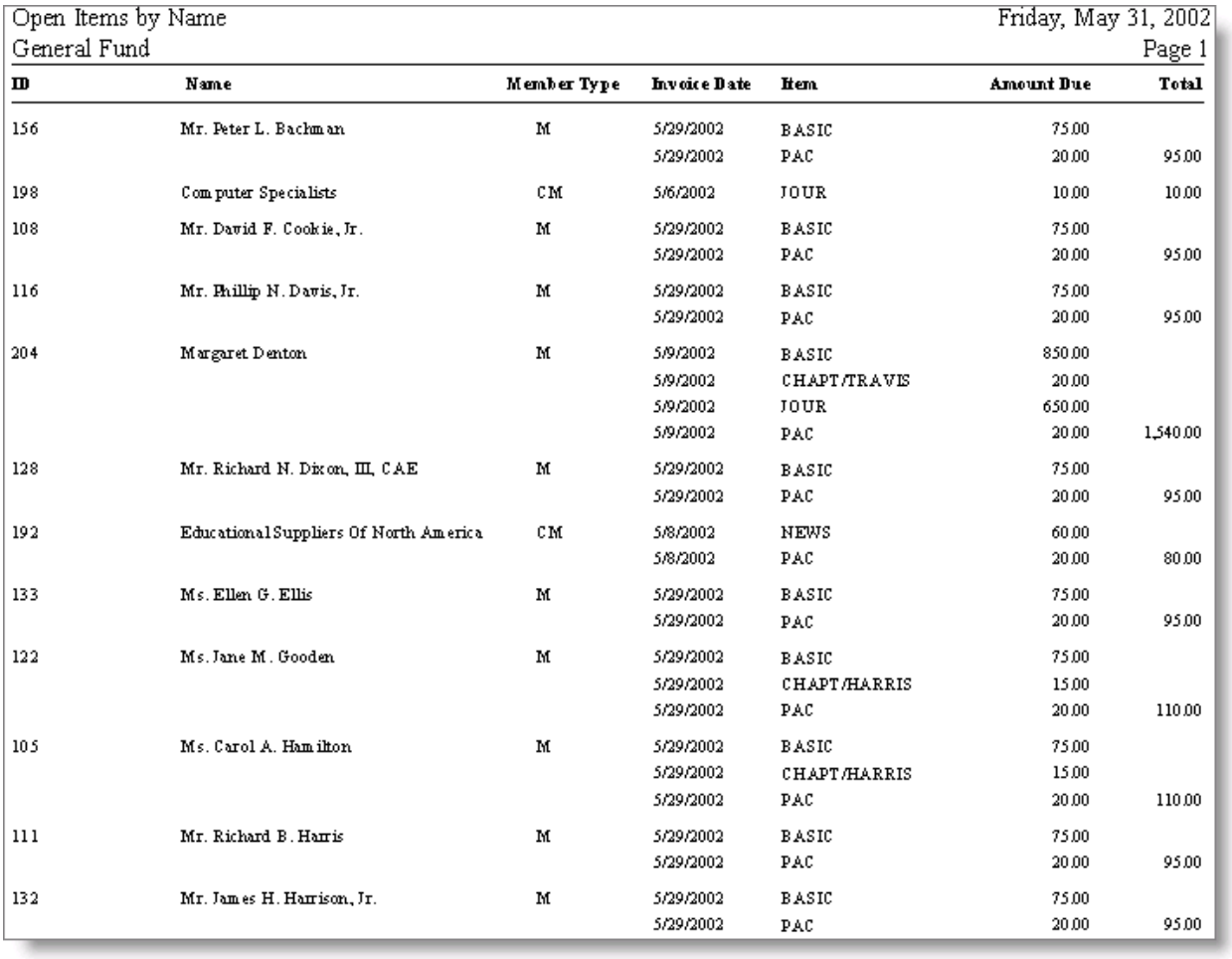
Admin Console: Continuum > Membership Reports > Billing reports > Tables

Desktop: Billing > Generate Reports > Tables

Open Invoices by Name report

The Open Items by Name report lists open line-item amounts (by customer or subscriber) that have been billed through the system and have not been paid.

Fundraising Dues items are flagged (**) and the report includes the footer "** = Voluntary Donation".



Open Items by Name — Friday, May 31, 2002
General Fund — Page 1

ID	Name	Member Type	Invoice Date	Item	Amount Due	Total
156	Mr. Peter L. Backman	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
198	Computer Specialists	CM	5/6/2002	JOUR	10.00	10.00
108	Mr. David F. Cookie, Jr.	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
116	Mr. Phillip N. Davis, Jr.	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
204	Margaret Denton	M	5/9/2002	BASIC	850.00	
			5/9/2002	CHAPT/TRAVIS	20.00	
			5/9/2002	JOUR	650.00	
			5/9/2002	PAC	20.00	1,540.00
128	Mr. Richard N. Dixon, III, CAE	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
192	Educational Suppliers Of North America	CM	5/8/2002	NEWS	60.00	
			5/8/2002	PAC	20.00	80.00
133	Ms. Ellen G. Ellis	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
122	Ms. Jane M. Gooden	M	5/29/2002	BASIC	75.00	
			5/29/2002	CHAPT/HARRIS	15.00	
			5/29/2002	PAC	20.00	110.00
105	Ms. Carol A. Hamilton	M	5/29/2002	BASIC	75.00	
			5/29/2002	CHAPT/HARRIS	15.00	
			5/29/2002	PAC	20.00	110.00
111	Mr. Richard B. Harris	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
132	Mr. James H. Harrison, Jr.	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00

Admin Console: Continuum > Membership Reports > Billing reports > Open Invoices > Open Invoices by Name

Desktop: Billing > Generate reports > Open Invoices > Open Items by Name

Open Items by Product report

The Open Items by Product report lists open billing amounts (sorted by product) that have been billed through the system and have not been paid. By default, the report lists all items that are open when the report is run. You can use ad hoc selection criteria to reduce the number of items selected. (Click Options and select Search Format before clicking Run.)

Fundraising Dues items are flagged (**) and the report includes the footer "** = Voluntary Donation".

Open Items by Product — Friday, May 31, 2002
General Fund — Page 1

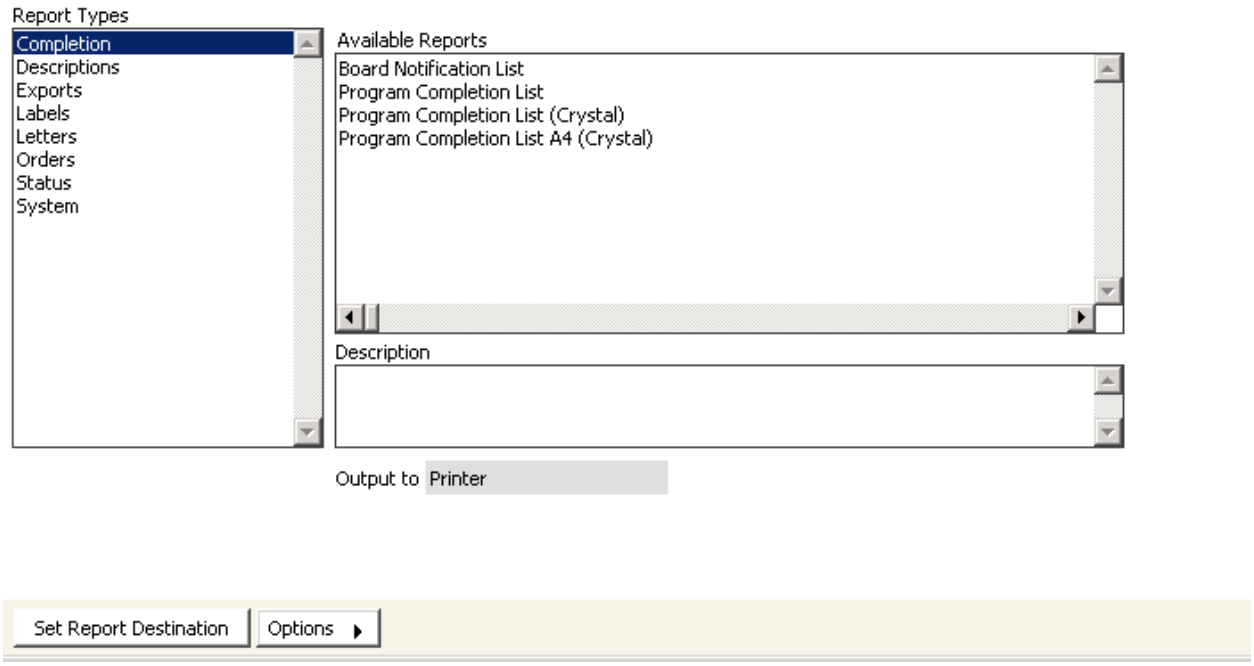
Item/Description	Name	Member Type	Invoice Date	Amount Due
BASIC	Basic Membership Dues			
137	Academy of Child Professors	CM	11/23/1999	100.00
156	Mr. Peter L. Bachman	M	5/29/2002	75.00
180	Brown & Brown	CM	11/23/1999	750.00
107	Ms. Paula D. Caller, CPA	CPA	11/23/1999	100.00
189	Cardio Systems	CM	11/23/1999	1,100.00
183	Computer Specialists	CM	11/23/1999	850.00
185	Cook Graphics	CM	11/23/1999	900.00
108	Mr. David F. Cookie, Jr.	M	5/29/2002	75.00
168	Critical Care Systems	CM	11/23/1999	300.00
116	Mr. Phillip N. Davis, Jr.	M	5/29/2002	75.00
204	Margaret Denton	M	5/9/2002	850.00
128	Mr. Richard N. Dixon, III, CAE	M	5/29/2002	75.00
133	Ms. Ellen G. Ellis	M	5/29/2002	75.00
104	Foundation Support Systems	CM	11/23/1999	400.00
122	Ms. Jane M. Gooden	M	5/29/2002	75.00
105	Ms. Carol A. Hamilton	M	5/29/2002	75.00
111	Mr. Richard B. Harris	M	5/29/2002	75.00
132	Mr. James H. Harrison, Jr.	M	5/29/2002	75.00
166	International Medico	CM	5/8/2002	100.00
129	Mr. Murray K. Jackson	M	5/29/2002	75.00
179	Lambs Industries	CM	11/23/1999	700.00
154	Mr. James W. Main, Jr., CPA	M	5/29/2002	75.00
207	Mary Matthews	M	5/29/2002	75.00
131	Mr. Larry L. Miller	M	5/29/2002	75.00
140	Ms. Louree U. Miller	M	5/29/2002	75.00
188	Morris Health	CM	11/23/1999	1,000.00
136	Ms. Margaret K. Nelson	M	5/29/2002	75.00
167	Omaha Medical Supplies	CM	11/23/1999	200.00
194	Christopher Panella	M	4/26/2002	75.00
114	Pecan Street, Inc.	CM	11/23/1999	450.00
199	Janet Prosser	M	5/7/2002	75.00
127	Publications Etc.	CM	11/23/1999	600.00
170	Quality Products	CM	11/23/1999	500.00

Admin Console: Continuum > Membership Reports > Billing reports > Open Invoices > Open invoices by Product

Desktop: Billing > Generate reports > Open Invoices > Open Items by Product (Crystal)

Certification Reports

Certification reports window



Admin Console: Continuum > Membership Reports > Certification reports

Desktop: Certification > Generate reports

There are several Certification reports. Some are necessary for updating student records, such as the Board Notification List report or the Program Completion List report (which also tests for program completion).

You will run all certification reports from the Certification reports window.

Generating Completion Reports

Completion reports update program information for students who have completed a certification program. For example, when you run the Board Notification List report, which contains a list of students who have completed the requirements for the selected program, student records are updated as well as fields on the Register a student by program window.

To generate a completion report

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Completion.
3. From Available Reports, select a report.
4. Click Set Report Destination and select an output option.
5. Click Run. The Certification Selections window opens.
6. Select a search option:

- Single Program – Enter a program code, or click the lookup icon to select a program. Processes a report for the single program.
- All Active Programs – Processes a report for all active programs
- Adhoc Search – Create the search criteria to use to process the report.

7. Click OK to run the report.

To view program status after the completion report is run

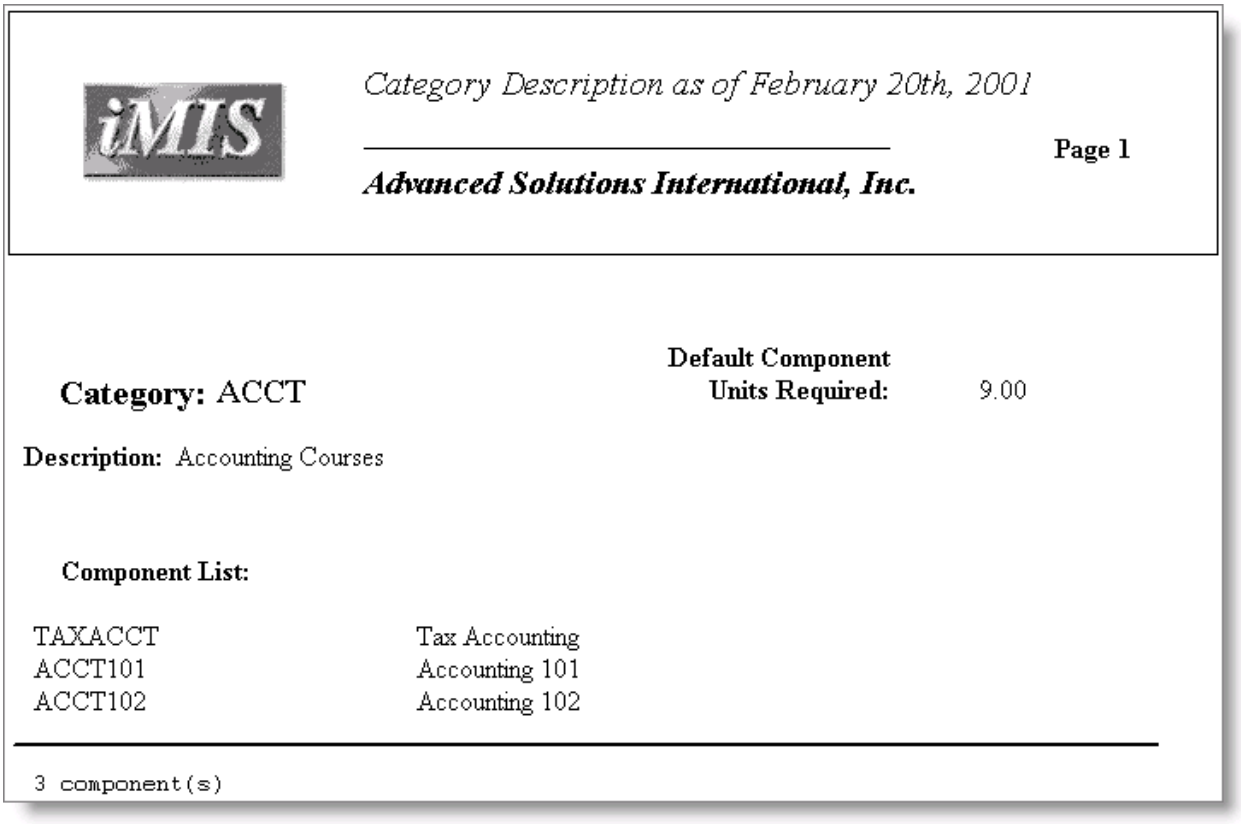
1. From Certification, select Register a student > By program to open the Register a student by program window.
2. Click Open.
3. Enter an ID in the Registrant field.
4. Press Tab. The student's record is displayed. The Board Notified? field is checked and the When? field contains today's date.

Generating Description Reports

Description reports allow you to view the details of a specific category or component, as well as lists of categories or components. For example, the Category Description report displays all the components that make up the category and the number of units required to complete the category. In addition, you can generate reports listing all available certification categories, components, and programs.

To generate a description detail report

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Descriptions.
3. From Available Reports, select the Category Description report .
4. Click Run. The Certification Selections window opens.
5. Enable the appropriate Certification Items options.
6. Click OK to generate the Category Description report.



Category Description as of February 20th, 2001

Page 1

Advanced Solutions International, Inc.

Default Component
Units Required: 9.00

Category: ACCT

Description: Accounting Courses

Component List:

TAXACCT	Tax Accounting
ACCT101	Accounting 101
ACCT102	Accounting 102

3 component(s)

Sample Description Detail report

Generating Export Reports

You can run special export reports for generating form letters in your word processing software, for example, a letter from the executive director or president to students when they earn their certification. The Certification module exports files to both Microsoft Word and WordPerfect.

To generate an export file

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Exports.
3. From Available Reports, select Export Name and Address to Microsoft Word.
4. Click Run to open the Certification Selections window.
5. Enable the appropriate Certification Items option.
6. Select the appropriate Print Options.
7. Enable the appropriate Address option.
8. Click OK to open the Set print file name window.
9. Enter a file name and click Save.
10. Open a blank document in Microsoft Word.
11. Select Tools > Mail Merge. The Mail Merge Helper window opens.
12. Click Create > Form Letters under the Main document area. A message asks you to choose either Active Window or New Main Document.
13. Click Active Window.
14. Click Get Data > Open Data Source under the Data source section, and browse to the file you saved. A message alerts you that Word found no merge fields in your main document and displays an Edit Main Document button.
15. Click Edit Main Document and enter the appropriate merge fields in the document.
16. Click OK to save the document.
17. Merge the information and print the form letter.

Generating Certification Letter Reports

With the Certification module, you can generate letters to specific students.

To generate letter reports

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Letters.
3. From Available Reports, select Student Notification Letters.
4. Click Run to open the Certification Selections window.
5. Enable the appropriate Certification Items options.
6. Enter an ID in the Student ID field.
7. Enable the Notify Student option.
8. Click OK to generate the Student Notification Letter report.

Generating Status Reports

With the Certification module, you can generate several reports that allow you to view the status of program components, as well as the status of students enrolled in either one or multiple programs.

To run the Component Registration List report

With the Certification module, you can see how many people are registered for any component and generate a list of their names.

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Status.
3. From Available Reports, select a report.
4. Click Run. The Certification Selections window displays.
5. Enable the appropriate Single Component and enter the component code in the data entry field.
6. Click OK.

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Registration List

Component Registration List As Of: February 20th, 2001

ACCT101 - Accounting 101

The University Of Texas
1991 Red River
Austin, TX 78701
U.S.

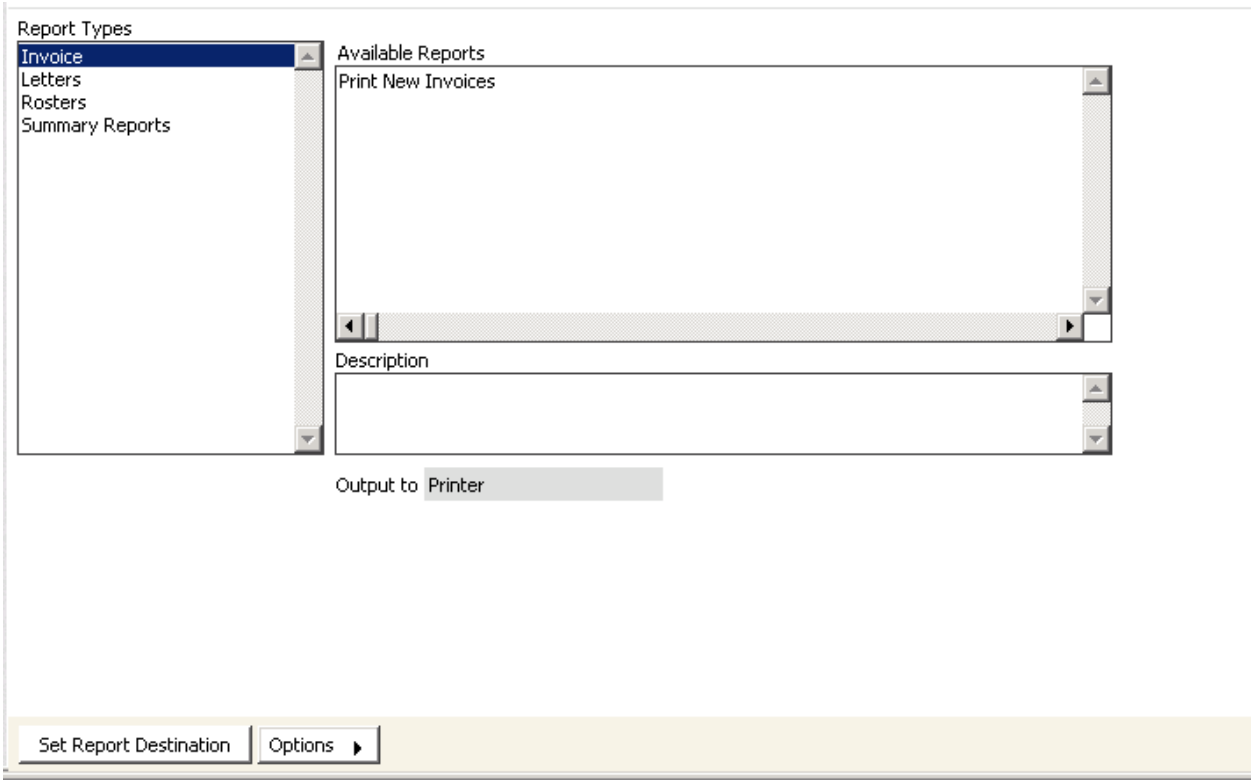
Student		Enrolled Date
107	Ms. Paula D. Caller, CPA, Acme, Inc., Newark, NJ	01/24/00
152	Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International, Newark, NJ	01/24/00
152	Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International, Newark, NJ	01/24/00
107	Ms. Paula D. Caller, CPA, Acme, Inc., Newark, NJ	01/24/00

Total Number of Registrants For: ACCT101 4

Sample Component Registration List report

Referral Reports

Referral reports window



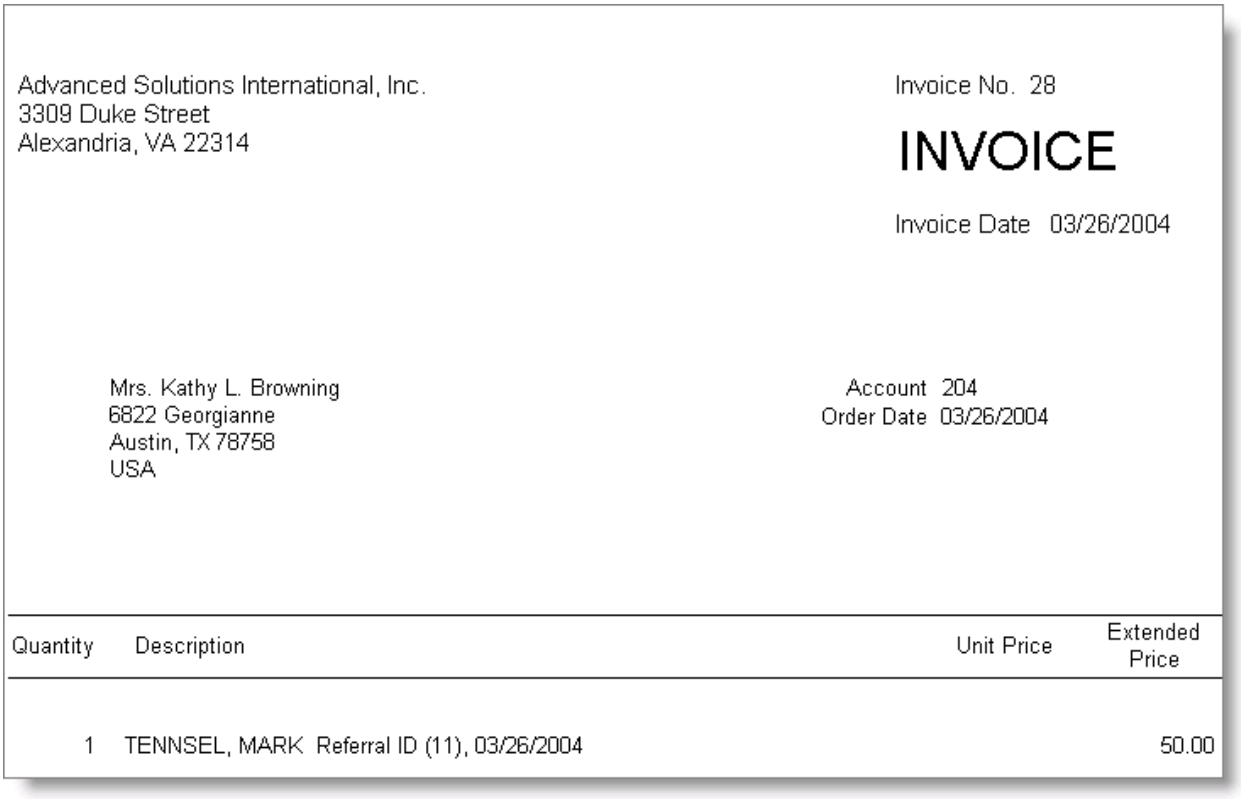
Admin Console: Continuum > Membership Reports > Referral reports

Desktop: Referrals > Generate reports

Sample Referral reports

Print Invoice report

The Print Invoice report prints an invoice listing additional referral fees charged to clients.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Invoice No. 28

INVOICE

Invoice Date 03/26/2004

Mrs. Kathy L. Browning
6822 Georgianne
Austin, TX 78758
USA

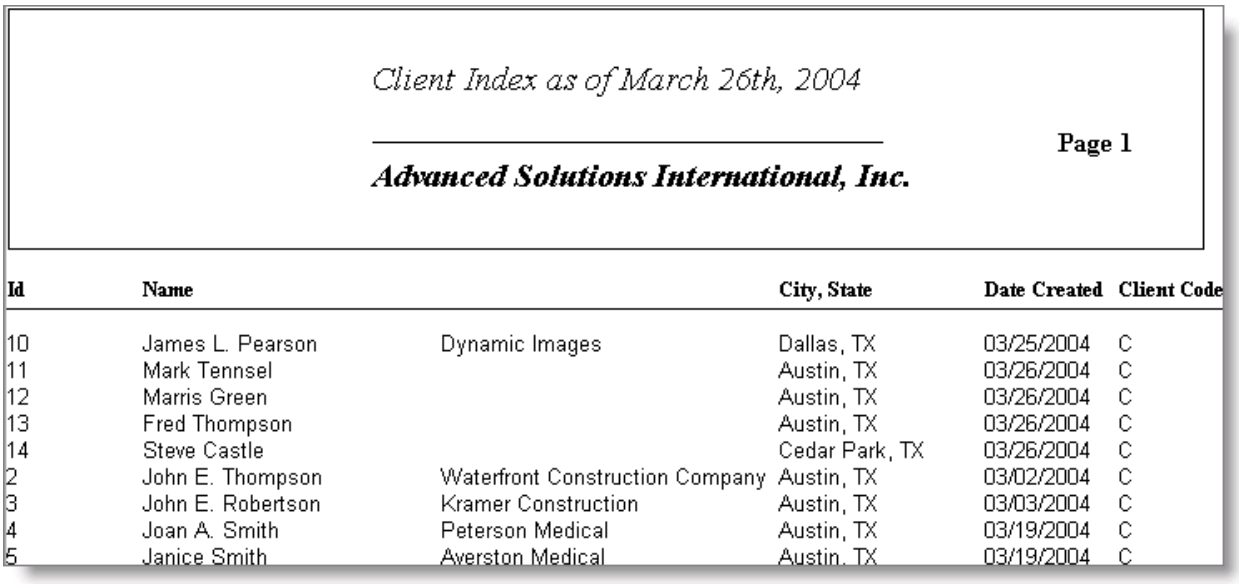
Account 204
Order Date 03/26/2004

Quantity	Description	Unit Price	Extended Price
1	TENNSEL, MARK Referral ID (11), 03/26/2004		50.00

Print Invoice report

Roster Reports

Roster reports are available to allow you to print a list of providers or clients.



Client Index as of March 26th, 2004

Page 1

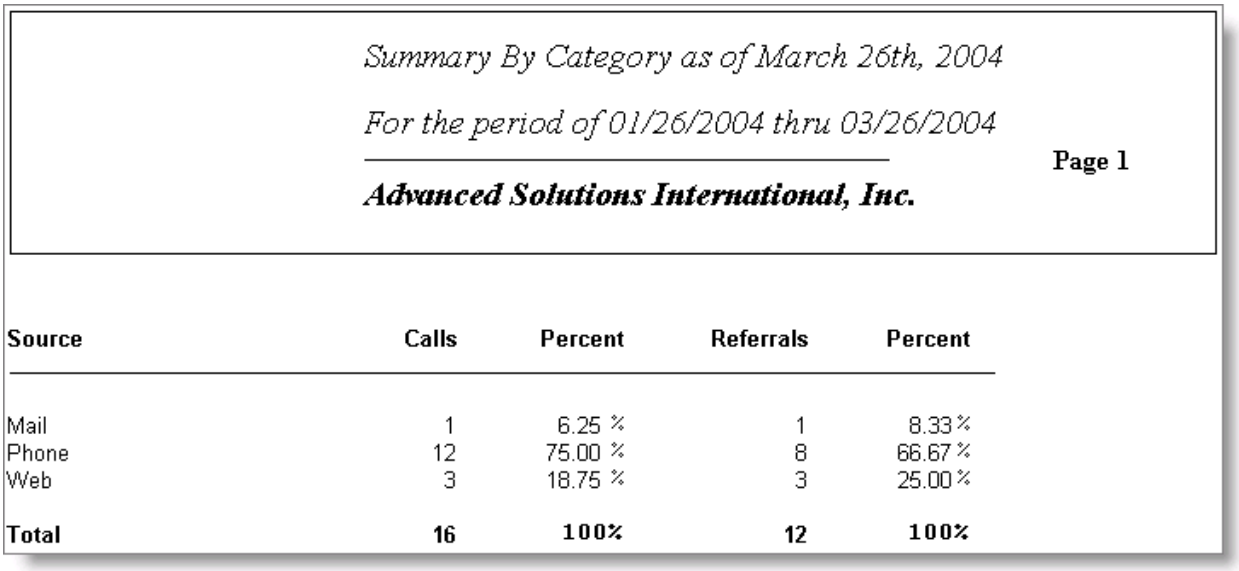
Advanced Solutions International, Inc.

Id	Name		City, State	Date Created	Client Code
10	James L. Pearson	Dynamic Images	Dallas, TX	03/25/2004	C
11	Mark Tennsel		Austin, TX	03/26/2004	C
12	Marris Green		Austin, TX	03/26/2004	C
13	Fred Thompson		Austin, TX	03/26/2004	C
14	Steve Castle		Cedar Park, TX	03/26/2004	C
2	John E. Thompson	Waterfront Construction Company	Austin, TX	03/02/2004	C
3	John E. Robertson	Kramer Construction	Austin, TX	03/03/2004	C
4	Joan A. Smith	Peterson Medical	Austin, TX	03/19/2004	C
5	Janice Smith	Averston Medical	Austin, TX	03/19/2004	C

Client Index report

Summary Reports

Several summary reports are available, including a report that allows you to summarize referrals by Source, Status, Reason or Type.



Summary By Category as of March 26th, 2004

For the period of 01/26/2004 thru 03/26/2004

Page 1

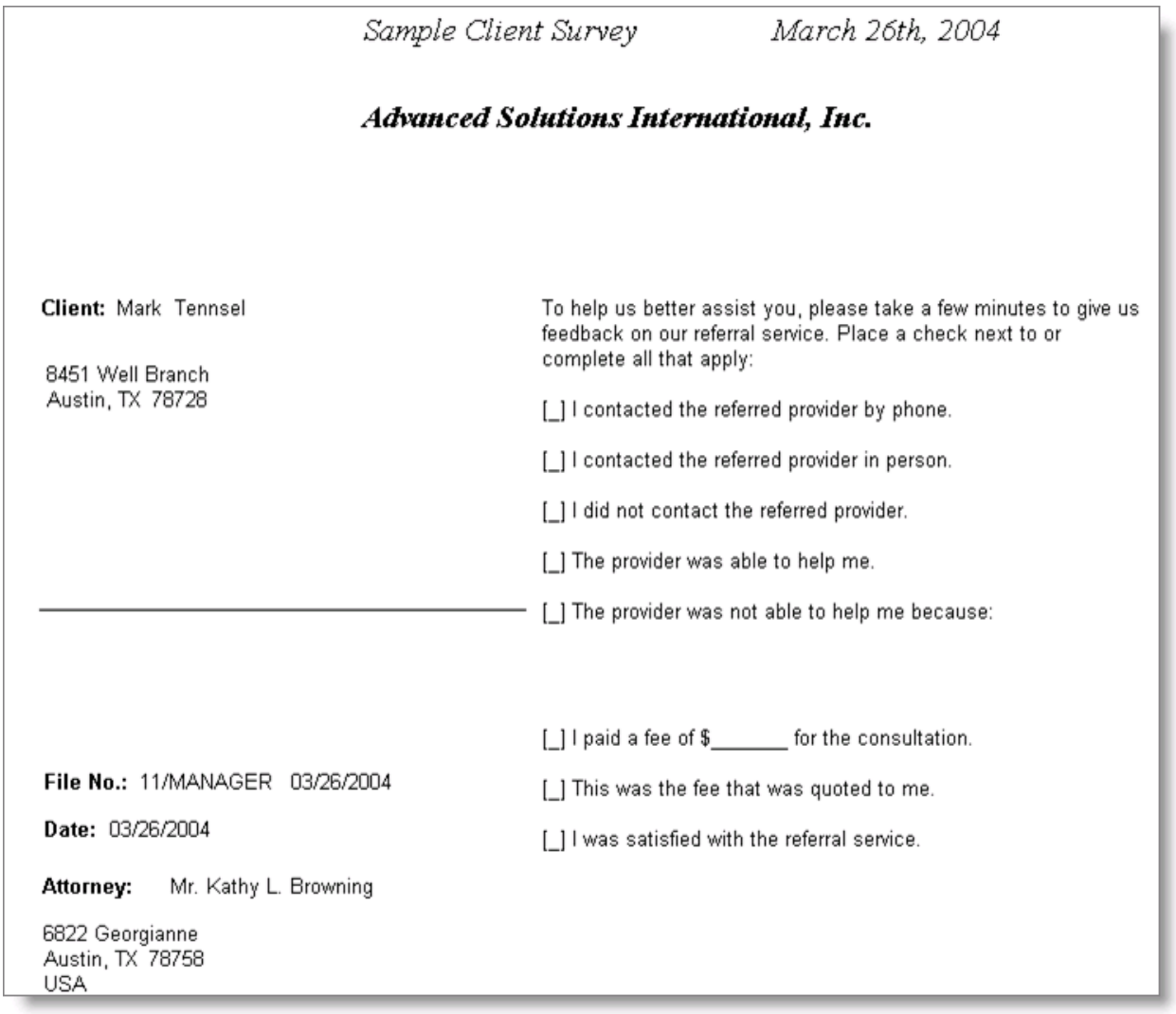
Advanced Solutions International, Inc.

Source	Calls	Percent	Referrals	Percent
Mail	1	6.25 %	1	8.33 %
Phone	12	75.00 %	8	66.67 %
Web	3	18.75 %	3	25.00 %
Total	**16**	**100%**	**12**	**100%**

Summary By Category report

Survey Reports

Client and provider survey reports are available to allow you to obtain and track feedback associated with the referral.



Sample Client Survey *March 26th, 2004*

Advanced Solutions International, Inc.

Client: Mark Tennsel

8451 Well Branch
Austin, TX 78728

To help us better assist you, please take a few minutes to give us feedback on our referral service. Place a check next to or complete all that apply:

[_] I contacted the referred provider by phone.

[_] I contacted the referred provider in person.

[_] I did not contact the referred provider.

[_] The provider was able to help me.

[_] The provider was not able to help me because:

[_] I paid a fee of $_____ for the consultation.

[_] This was the fee that was quoted to me.

[_] I was satisfied with the referral service.

File No.: 11/MANAGER 03/26/2004

Date: 03/26/2004

Attorney: Mr. Kathy L. Browning

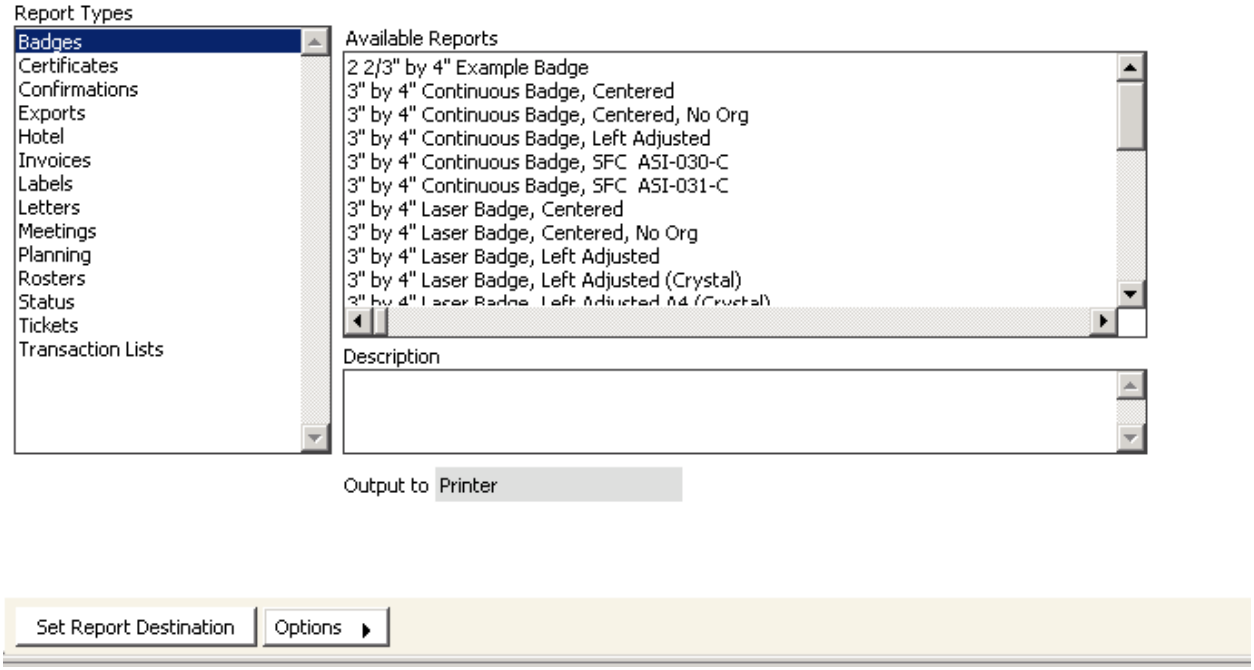
6822 Georgianne
Austin, TX 78758
USA

Client Survey report

Events and Orders Reports

Event Reports

Event reports window



Admin Console: Continuum > Events and Orders Reports > Event reports

Desktop: Events > Generate reports

Events-Specific Report Options

The report options Print_Guest and Print_Additional_Badges enable you to include Event badge holders other than conference registrants in several Events reports. The check-boxes for these options, Guest and Additional Badges, are included under the Print Options area of the Event Selections window.

Note: Badge holder information is entered on the Event Registration > Badge Information window.

Print_Guest affects Events badge holders whose BADGE_TYPE is GUEST.

Note: The GUEST type must be defined in the BADGE_TYPE General Lookup/Validation table for the report option to work correctly.

Print_Additional_Badges affects Events badge holders whose BADGE_TYPE is any type other than PRIMARY.

The following reports accommodate the use of Print_Guest and Print_Additional_Badges:

- Formal Meeting Roster, Alpha by Name (Crystal) – the report format groups and sorts by the primary registrant's last name, with associated badge holders, sorted by their last names, directly following the primary registrant.
- Formal Meeting Roster, by Company (Crystal) – the report format groups and sorts primary registrants by their company names, with associated badge holders, sorted by their last names, directly following the primary registrant. Company names are not listed for non-primary badge holders.
- Preregistration List (Crystal) – the report format groups and sorts by Meeting Title, Order Number, Primary Registrant, and associated badge holders.

The following reports offer the Print_Guest and Print_Additional_Badges options but have not been specially formatted to use them:

- Formal Meeting Roster, by Company/Institute (Crystal) – no change to report format
- Preregistration List
- Export Registrants to Microsoft Word
- All Labels by Zip
- All Badges reports except Combination Badge and Ticket reports

Note: Combination Badge and Ticket reports automatically print a badge for the Registrant and a badge for the next badge holder listed in that registrant's Badges tab. This feature cannot be turned off.

Modifying invoice reports for zero balance and payment details

The following reports, when the search condition is modified in the report specification, can print invoices for registrants with a zero balance:

- MeetingInvoicesOE4
- MeetingInvoicesOE4_VAT
- MeetingInvoicesOE1
- MeetingInvoicesOE1_VAT

These changes are intended only for customized and cloned reports. The standard reports will not differ from their previous versions. You can clone any of the above reports or customized versions of these reports and manually modify the relevant report specification to achieve the intended results.

To modify an invoice to print zero-balance invoices

1. Clone the desired Meeting Invoices report.
2. Click Parameters to display the Detail Report Parameters window.
3. In the Search field, remove the Orders.BALANCE <> 0 criteria.
4. Click Save. You can now run the cloned report.

The Multi Payments option enables you to print payment details for event registrations. The description field for each payment indicates the type of payment (check or credit card name) and the check number or credit card name (the credit card number is masked).

To print payment lines from Events > Generate reports, enable the Multi Payments option. If you want to print payment details on invoices generated from the Register a customer window, you must modify the invoice's report specification.

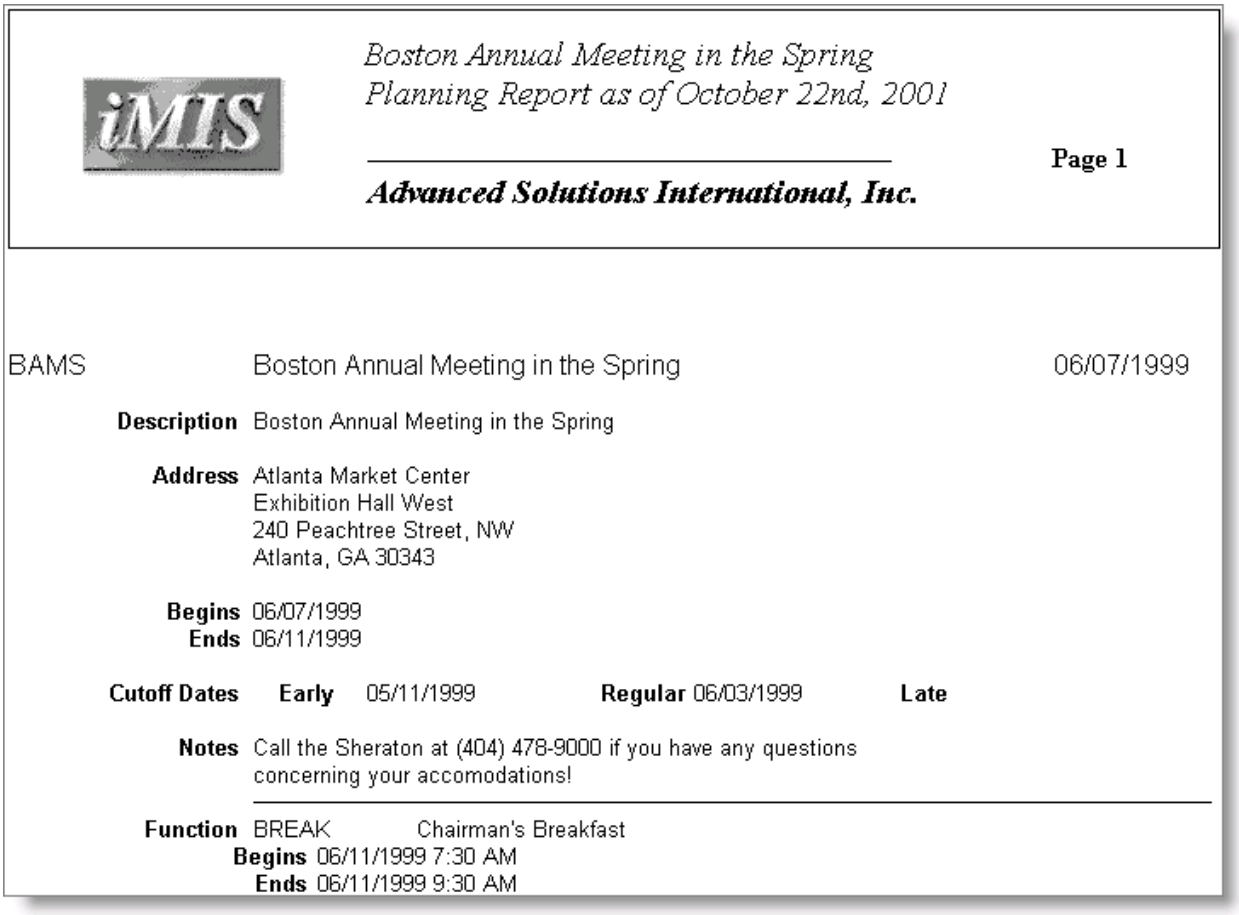
To modify an invoice to print payment details

1. Clone the desired Meeting Invoices report.
2. Click Parameters to display the Detail Report Parameters window.
3. Click Edit.
4. Change NO_MULTI_PAYMENTS to PRINT_MULTI_PAYMENTS in the Options field.
5. Click Save.

Sample Events Reports

Activity Planning report

The Activity Planning report lists total event definition, including event/function names and descriptions.



Boston Annual Meeting in the Spring
Planning Report as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

BAMS Boston Annual Meeting in the Spring 06/07/1999

Description Boston Annual Meeting in the Spring

Address Atlanta Market Center
Exhibition Hall West
240 Peachtree Street, NW
Atlanta, GA 30343

Begins 06/07/1999
Ends 06/11/1999

Cutoff Dates **Early** 05/11/1999 **Regular** 06/03/1999 **Late**

Notes Call the Sheraton at (404) 478-9000 if you have any questions concerning your accomodations!

Function BREAK Chairman's Breakfast
Begins 06/11/1999 7:30 AM
Ends 06/11/1999 9:30 AM

Admin Console: Continuum > Events and Orders Reports >Event Reports > Planning > Planning Report

Desktop: Events > Generate reports > Planning > Planning Report

Badges report

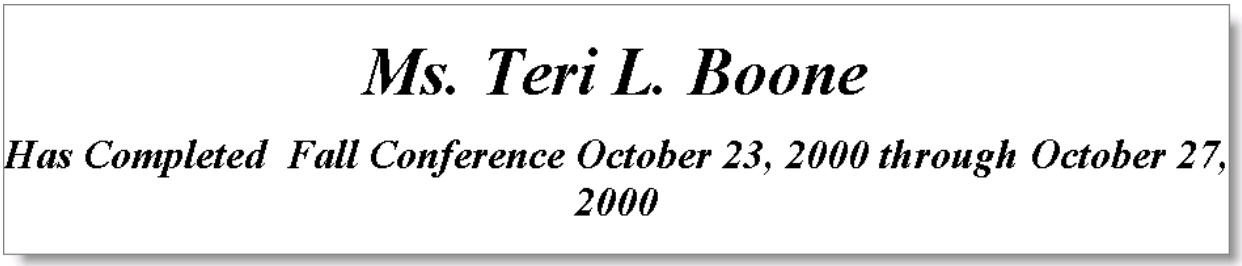
There are several different formats available for printing badges.

Admin Console: Continuum > Events and Orders Reports > Event Reports > Badges

Desktop: Events > Generate reports > Badges

CEU Certificates report

The CEU Certificates report prints a Function/Meeting Certificate (Form ASI-038).

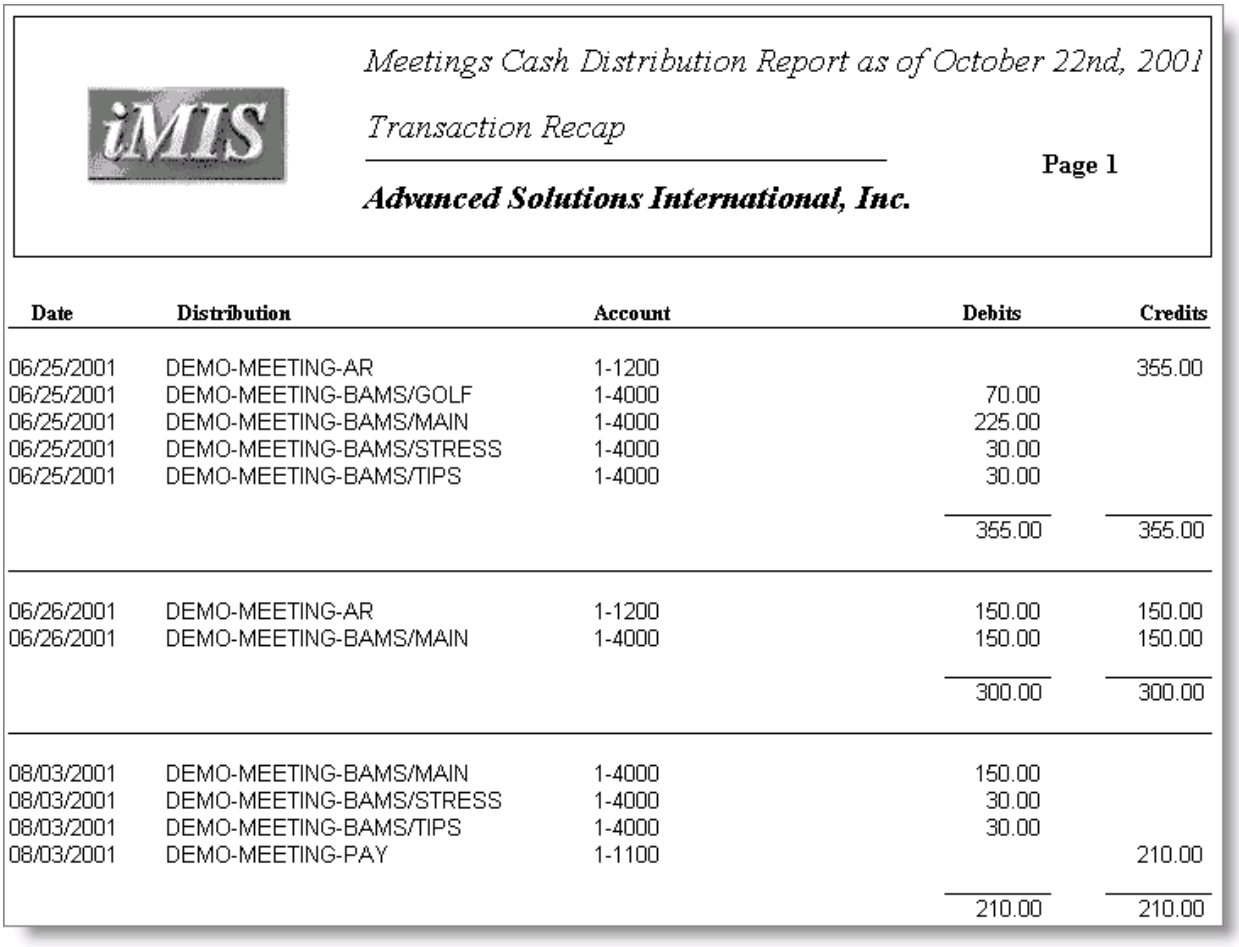


Admin Console: Continuum > Events and Orders Reports > Certificates > Function/Meeting Certificate SFL

Desktop: Events > Generate reports > Certificates > Function/Meeting Certificate SF

Meetings Cash Distribution report

The Meetings Cash Distribution report is a monthly transaction detail report, sorted by income account.



Meetings Cash Distribution Report as of October 22nd, 2001

Transaction Recap

Page 1

Advanced Solutions International, Inc.

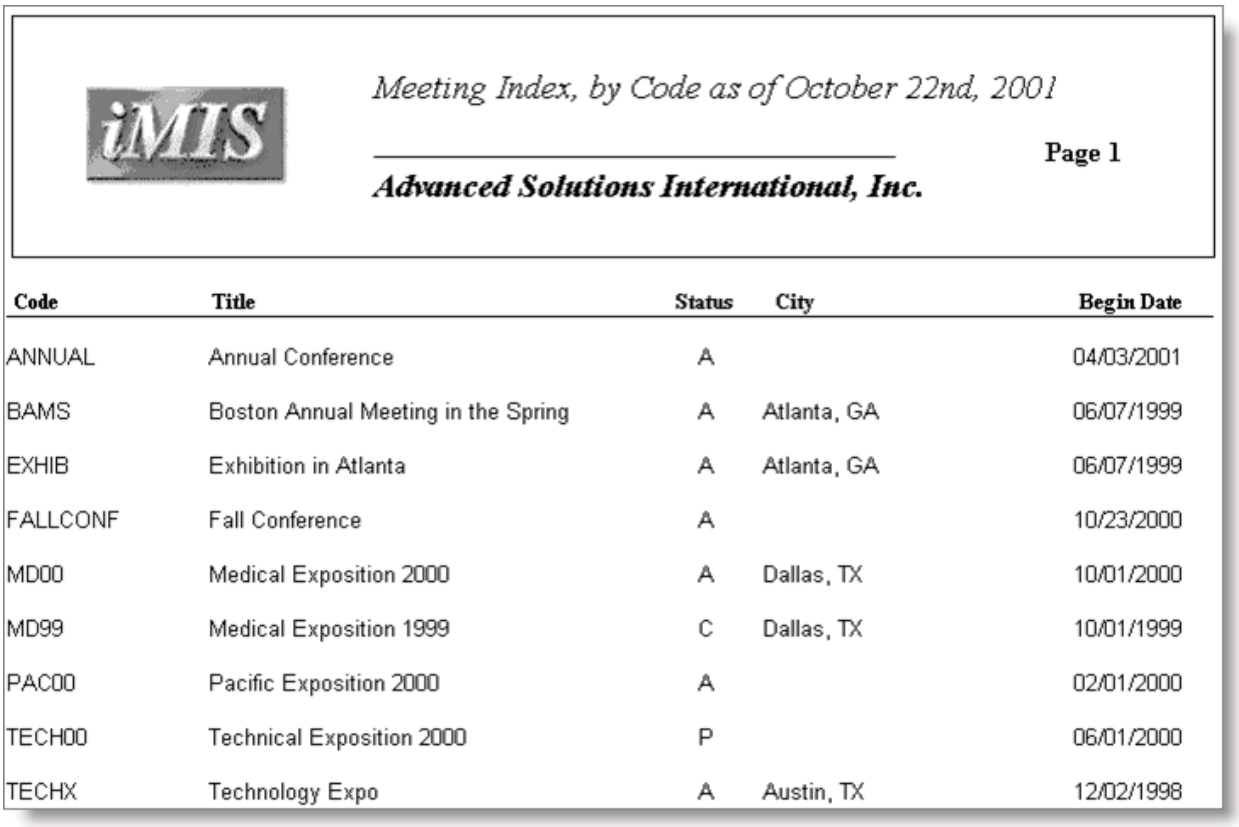
Date	Distribution	Account	Debits	Credits
06/25/2001	DEMO-MEETING-AR	1-1200		355.00
06/25/2001	DEMO-MEETING-BAMS/GOLF	1-4000	70.00	
06/25/2001	DEMO-MEETING-BAMS/MAIN	1-4000	225.00	
06/25/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
06/25/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
			355.00	355.00
06/26/2001	DEMO-MEETING-AR	1-1200	150.00	150.00
06/26/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	150.00
			300.00	300.00
08/03/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	
08/03/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
08/03/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
08/03/2001	DEMO-MEETING-PAY	1-1100		210.00
			210.00	210.00

Admin Console: Continuum > Events and Order Reports > Event reports > Transaction Lists > Meeting Cash Distribution Report

Desktop: Events > Generate reports > Transaction Lists > Meetings Cash Distribution Report

Meeting Index report

The Meeting Index report prints a list of all events. This index can be by code, date, status, or title.



Meeting Index, by Code as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Code	Title	Status	City	Begin Date
ANNUAL	Annual Conference	A		04/03/2001
BAMS	Boston Annual Meeting in the Spring	A	Atlanta, GA	06/07/1999
EXHIB	Exhibition in Atlanta	A	Atlanta, GA	06/07/1999
FALLCONF	Fall Conference	A		10/23/2000
MD00	Medical Exposition 2000	A	Dallas, TX	10/01/2000
MD99	Medical Exposition 1999	C	Dallas, TX	10/01/1999
PAC00	Pacific Exposition 2000	A		02/01/2000
TECH00	Technical Exposition 2000	P		06/01/2000
TECHX	Technology Expo	A	Austin, TX	12/02/1998

Admin Console: Continuum > Events and Orders Reports > Event Reports > Meetings > Meeting Index, by Code

Desktop: Events > Generate reports > Meetings > Meeting Index, By Code

Meetings Receipt Transactions report

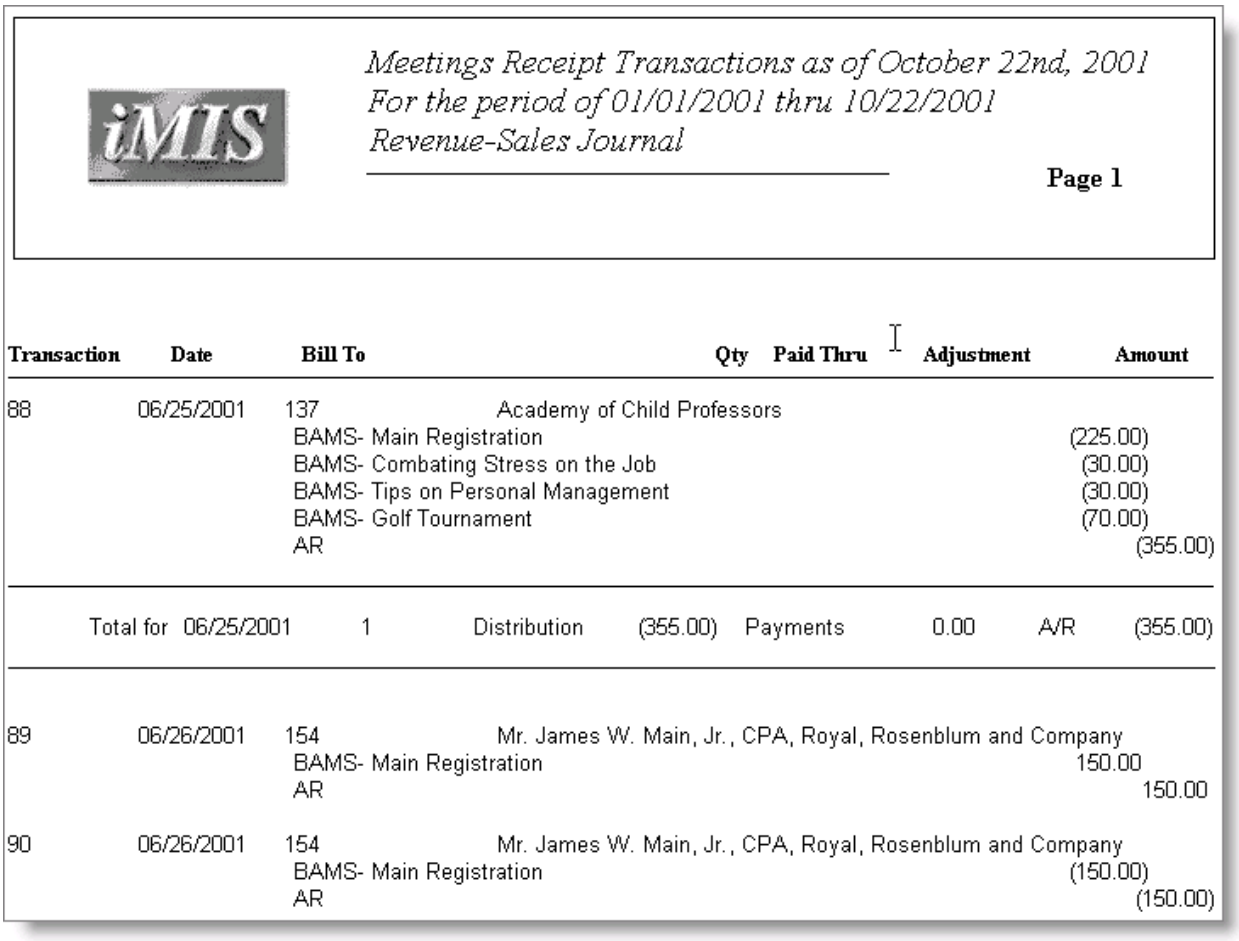
The Meetings Receipt Transactions report lists the total meeting definition, including event and function names, descriptions, and standard resources.

Meetings Receipt Transactions as of October 22nd, 2001

Transaction Recap

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
06/25/2001	DEMO-MEETING-AR	1-1200		355.00
06/25/2001	DEMO-MEETING-BAMS/GOLF	1-4000	70.00	
06/25/2001	DEMO-MEETING-BAMS/MAIN	1-4000	225.00	
06/25/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
06/25/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
			355.00	355.00
06/26/2001	DEMO-MEETING-AR	1-1200	150.00	150.00
06/26/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	150.00
			300.00	300.00
08/03/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	
08/03/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
08/03/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
08/03/2001	DEMO-MEETING-PAY	1-1100		210.00
			210.00	210.00



Meetings Receipt Transactions as of October 22nd, 2001
For the period of 01/01/2001 thru 10/22/2001
Revenue-Sales Journal

Page 1

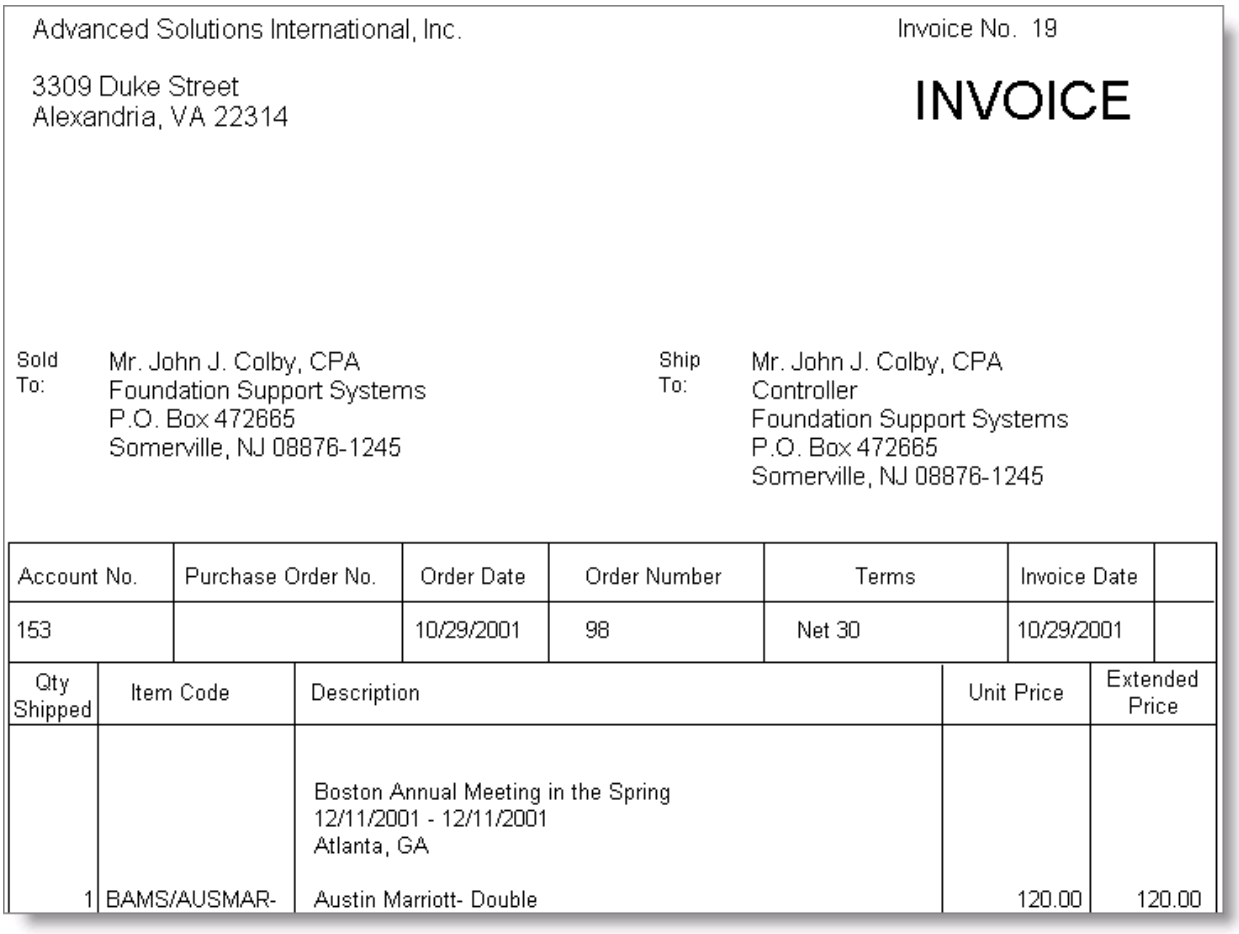
Transaction	Date	Bill To	Qty	Paid Thru	Adjustment	Amount
88	06/25/2001	137 Academy of Child Professors				
		BAMS- Main Registration				(225.00)
		BAMS- Combating Stress on the Job				(30.00)
		BAMS- Tips on Personal Management				(30.00)
		BAMS- Golf Tournament				(70.00)
		AR				(355.00)
	Total for 06/25/2001	1 Distribution	(355.00)	Payments	0.00	A/R (355.00)
89	06/26/2001	154 Mr. James W. Main, Jr., CPA, Royal, Rosenblum and Company				
		BAMS- Main Registration				150.00
		AR				150.00
90	06/26/2001	154 Mr. James W. Main, Jr., CPA, Royal, Rosenblum and Company				
		BAMS- Main Registration				(150.00)
		AR				(150.00)

Admin Console: Continuum > Events and Orders Reports > Event reports > Transaction Lists > Meetings Receipt Transactions

Desktop: Events > Generate reports > Transaction Lists > Meetings Receipt Transactions

Meeting Registration Invoice report

The Print Invoices report (MeetingInvoicesOE1.rpt) and Print New Invoices report (MeetingInvoicesOE4.rpt) allow the printing of the correct entity on the invoices by entering PRINT_MULTI_ENTITY in the Print options field on the Report Parameters window. It also includes a legend for cancelled and wait-listed functions.



Advanced Solutions International, Inc.

3309 Duke Street
Alexandria, VA 22314

Invoice No. 19

INVOICE

Sold To: Mr. John J. Colby, CPA
Foundation Support Systems
P.O. Box 472665
Somerville, NJ 08876-1245

Ship To: Mr. John J. Colby, CPA
Controller
Foundation Support Systems
P.O. Box 472665
Somerville, NJ 08876-1245

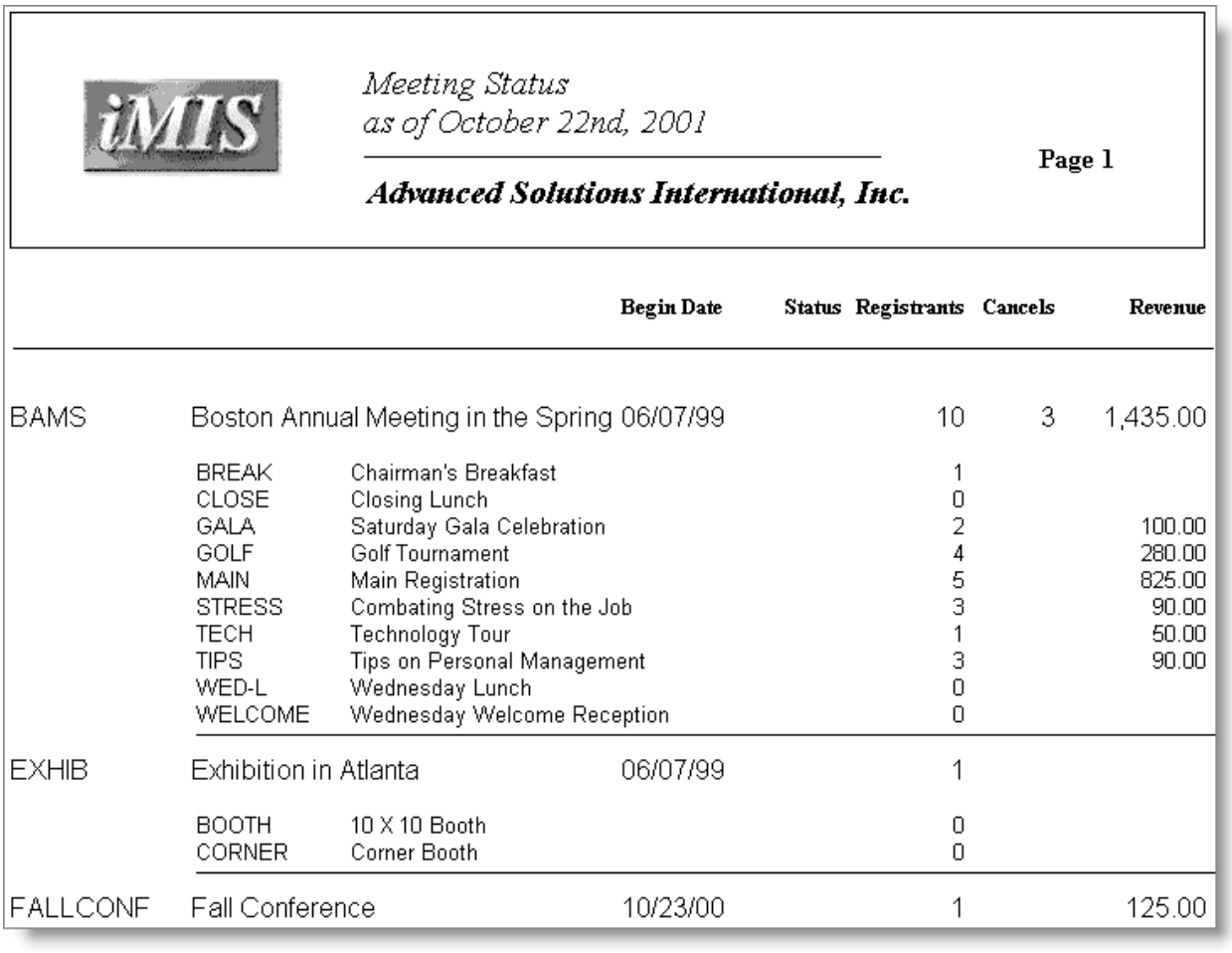
Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	
153		10/29/2001	98	Net 30	10/29/2001	

Qty Shipped	Item Code	Description	Unit Price	Extended Price
		Boston Annual Meeting in the Spring 12/11/2001 - 12/11/2001 Atlanta, GA		
1	BAMS/AUSMAR-	Austin Marriott- Double	120.00	120.00

Individual event invoices also can be run from Events Portfolio (from Events, select Register a customer, find an event registration, click Print, select the Invoice report option, and click Print).

Meeting Status report

The Meeting Status report prints the status of all events and functions.



Meeting Status
as of October 22nd, 2001

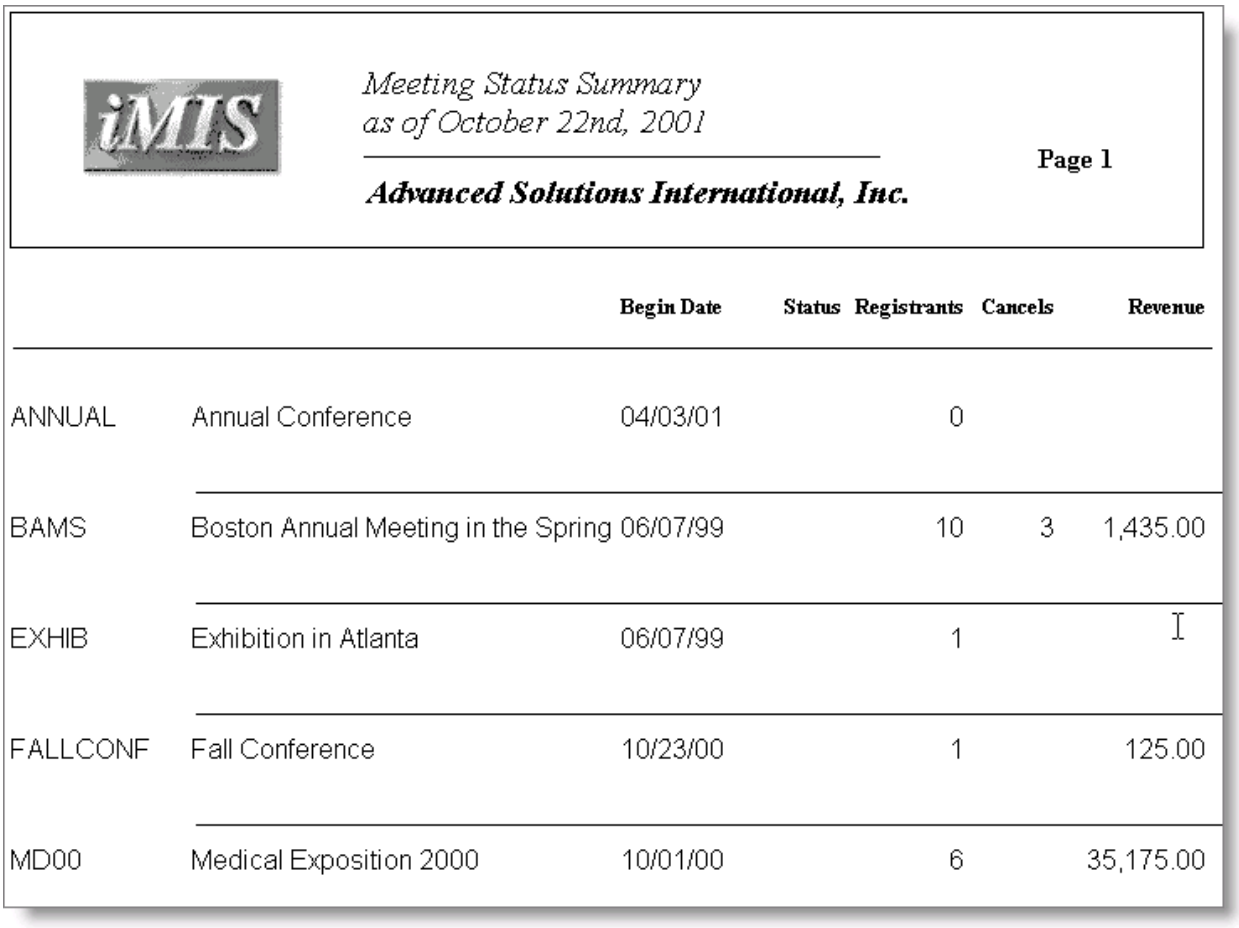
Page 1

Advanced Solutions International, Inc.

			Begin Date	Status	Registrants	Cancels	Revenue
BAMS	Boston Annual Meeting in the Spring		06/07/99		10	3	1,435.00
	BREAK	Chairman's Breakfast			1		
	CLOSE	Closing Lunch			0		
	GALA	Saturday Gala Celebration			2		100.00
	GOLF	Golf Tournament			4		280.00
	MAIN	Main Registration			5		825.00
	STRESS	Combating Stress on the Job			3		90.00
	TECH	Technology Tour			1		50.00
	TIPS	Tips on Personal Management			3		90.00
	WED-L	Wednesday Lunch			0		
	WELCOME	Wednesday Welcome Reception			0		
EXHIB	Exhibition in Atlanta		06/07/99		1		
	BOOTH	10 X 10 Booth			0		
	CORNER	Corner Booth			0		
FALLCONF	Fall Conference		10/23/00		1		125.00

Meeting Status Summary report

The Meeting Status Summary report prints a summary of all events.



Meeting Status Summary
as of October 22nd, 2001

Advanced Solutions International, Inc.

Page 1

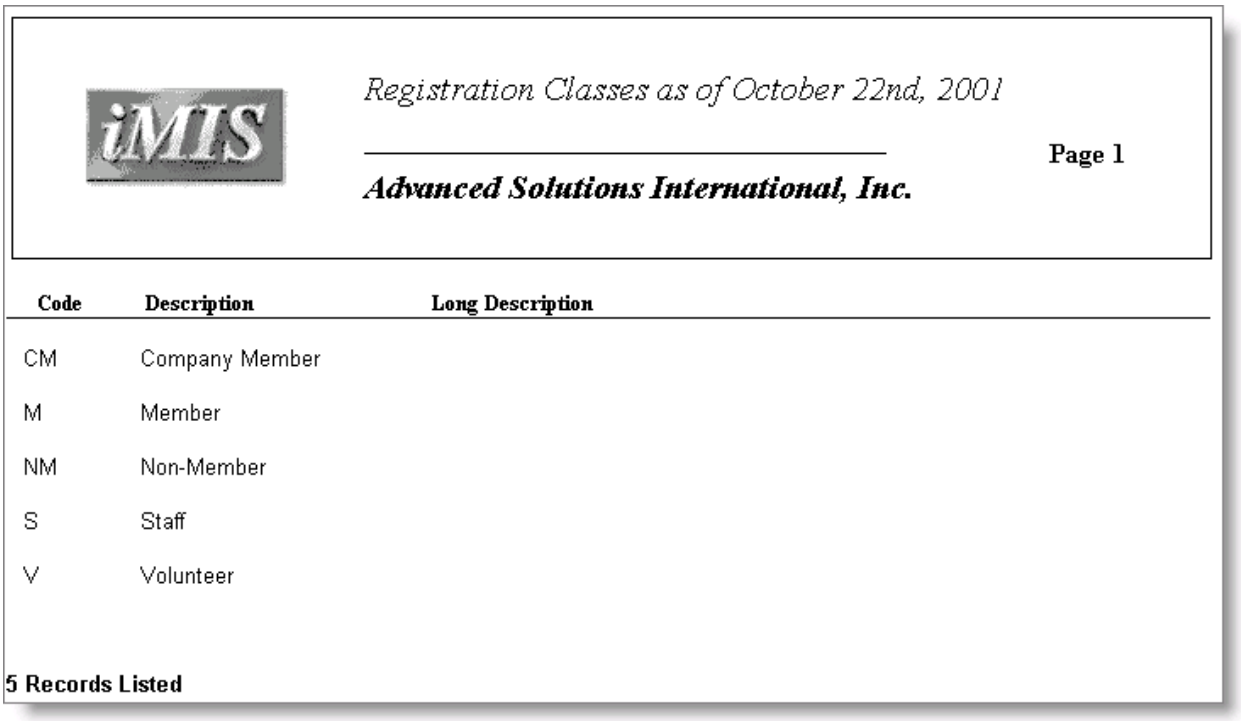
		Begin Date	Status	Registrants	Cancels	Revenue
ANNUAL	Annual Conference	04/03/01		0		
BAMS	Boston Annual Meeting in the Spring	06/07/99		10	3	1,435.00
EXHIB	Exhibition in Atlanta	06/07/99		1		
FALLCONF	Fall Conference	10/23/00		1		125.00
MD00	Medical Exposition 2000	10/01/00		6		35,175.00

Admin Console: Continuum > Events and Orders Reports > Event reports > Status > Meeting Status Summary

Desktop: Events > Generate reports > Status > Meeting Status Summary

Registration Class report

The Registration Class report displays a list of the available registration classes.



Registration Classes as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Code	Description	Long Description
CM	Company Member	
M	Member	
NM	Non-Member	
S	Staff	
V	Volunteer	

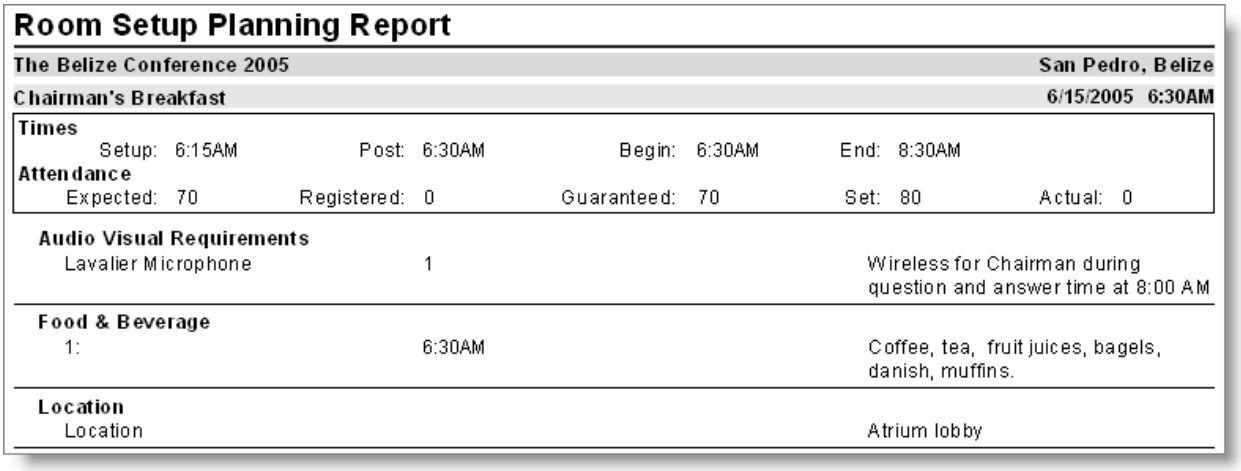
5 Records Listed

Admin Console: Continuum > Events and Orders Reports > Event reports > Planning > Registration Classes

Desktop: Events > Generate reports > Planning > Registration Classes

Room Setup Planning Report

The Room Setup Planning report provides the details of Event function plans. It can be run for all of the functions for a single event, for a specific function across different events, or for all functions of all events.



Room Setup Planning Report

The Belize Conference 2005 — **San Pedro, Belize**

Chairman's Breakfast — **6/15/2005 6:30AM**

Times
Setup: 6:15AM Post: 6:30AM Begin: 6:30AM End: 8:30AM

Attendance
Expected: 70 Registered: 0 Guaranteed: 70 Set: 80 Actual: 0

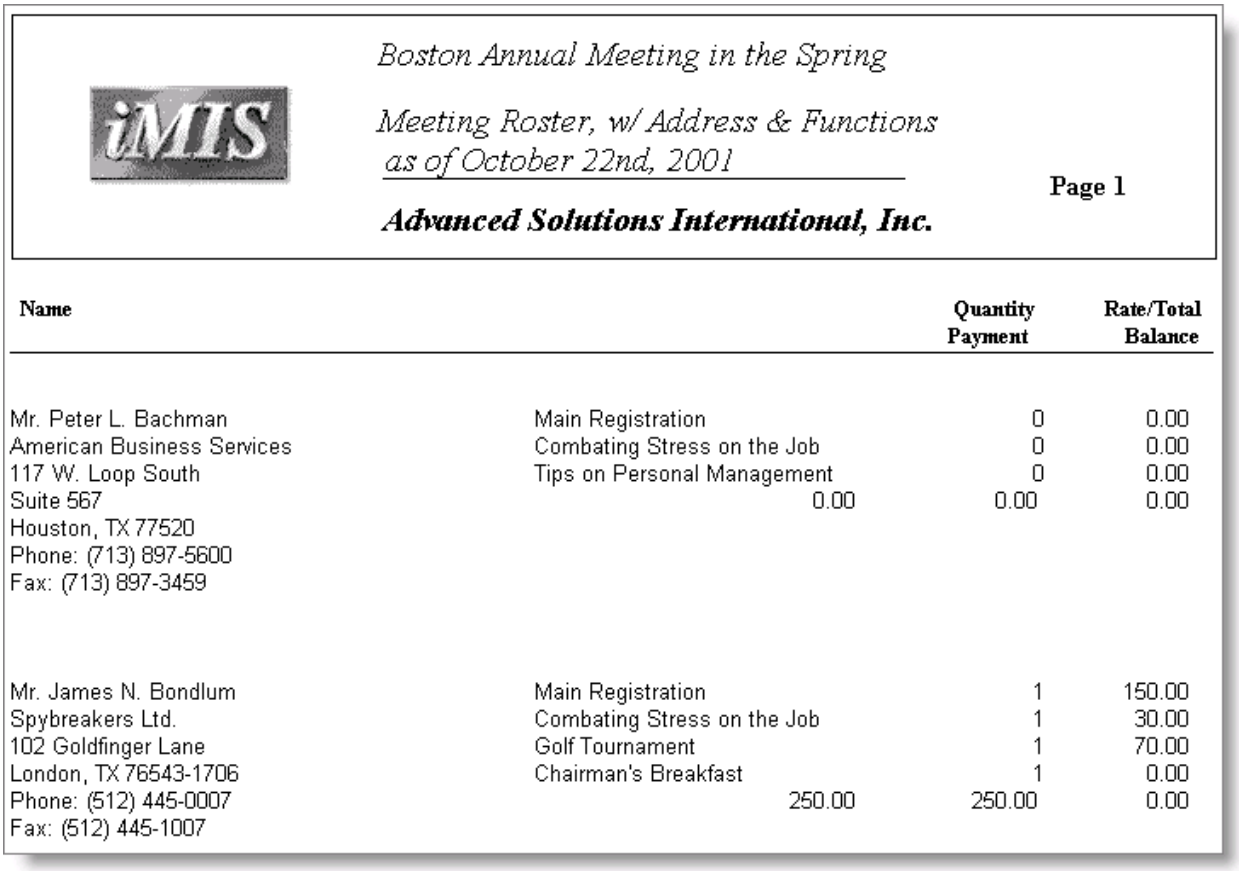
Audio Visual Requirements		
Lavalier Microphone	1	Wireless for Chairman during question and answer time at 8:00 AM
Food & Beverage		
1:	6:30AM	Coffee, tea, fruit juices, bagels, danish, muffins.
Location		
Location		Atrium lobby

Admin Console: Continuum > Events and Orders Reports > Event reports > Planning > Room Setup Planning Report

Desktop: Events > Generate reports > Planning > Room Setup Planning Report

Rosters and Directories report

The available rosters include function rosters, pre-registration lists, membership rosters, and directories.



Boston Annual Meeting in the Spring

Meeting Roster, w/ Address & Functions
as of October 22nd, 2001

Advanced Solutions International, Inc.

Page 1

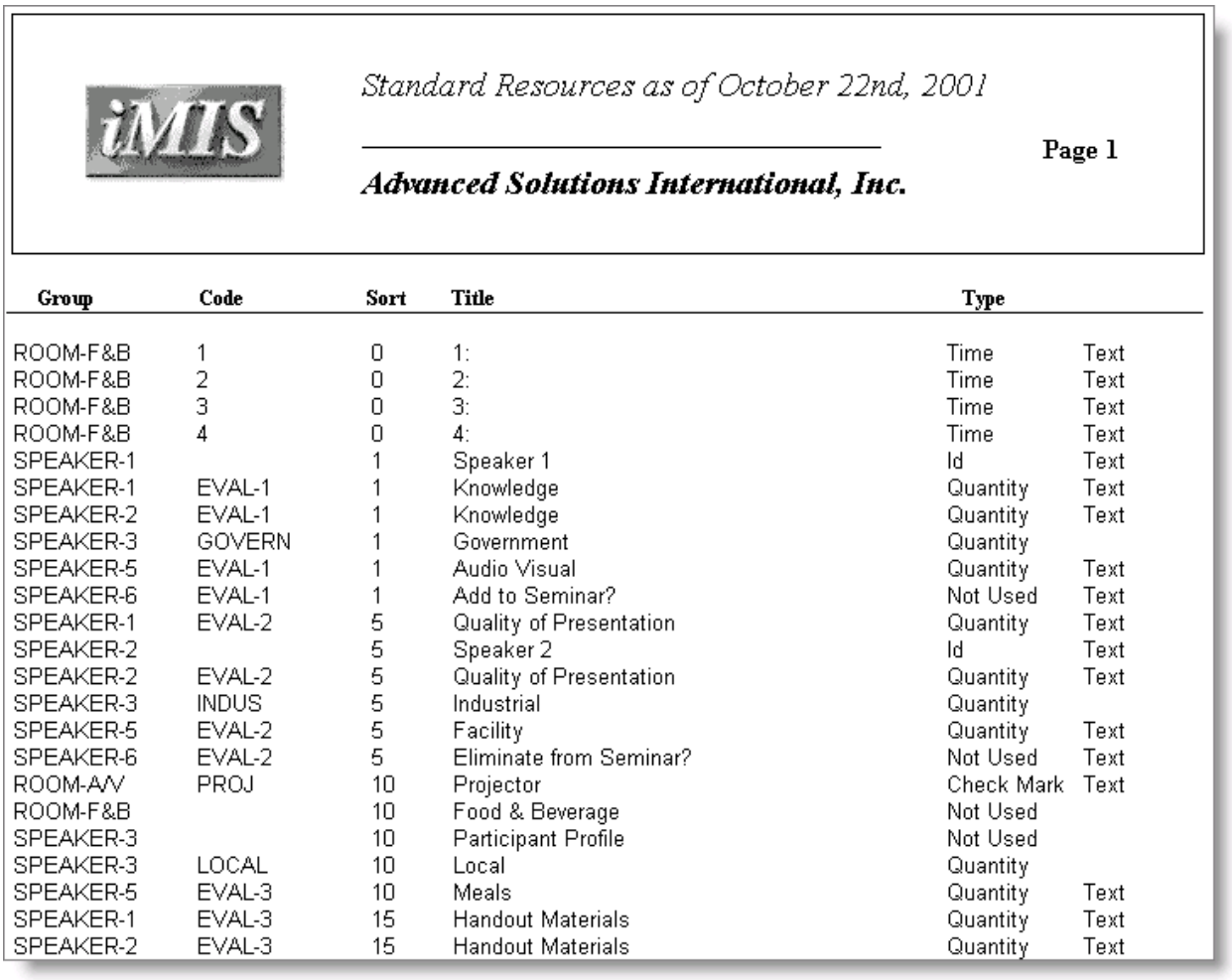
Name		Quantity Payment	Rate/Total Balance
Mr. Peter L. Bachman American Business Services 117 W. Loop South Suite 567 Houston, TX 77520 Phone: (713) 897-5600 Fax: (713) 897-3459	Main Registration	0	0.00
	Combating Stress on the Job	0	0.00
	Tips on Personal Management	0	0.00
	0.00	0.00	0.00
Mr. James N. Bondlum Spybreakers Ltd. 102 Goldfinger Lane London, TX 76543-1706 Phone: (512) 445-0007 Fax: (512) 445-1007	Main Registration	1	150.00
	Combating Stress on the Job	1	30.00
	Golf Tournament	1	70.00
	Chairman's Breakfast	1	0.00
	250.00	250.00	0.00

Admin Console: Continuum > Events and Orders Reports > Event reports > Rosters

Desktop: Events > Generate reports > Rosters

Standard Resources report

The Standard Resources report provides a description of all the standard resources.



Standard Resources as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

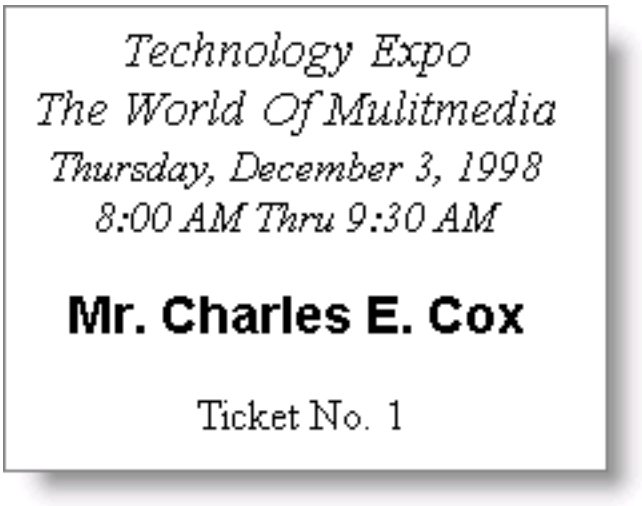
Group	Code	Sort	Title	Type	
ROOM-F&B	1	0	1:	Time	Text
ROOM-F&B	2	0	2:	Time	Text
ROOM-F&B	3	0	3:	Time	Text
ROOM-F&B	4	0	4:	Time	Text
SPEAKER-1		1	Speaker 1	Id	Text
SPEAKER-1	EVAL-1	1	Knowledge	Quantity	Text
SPEAKER-2	EVAL-1	1	Knowledge	Quantity	Text
SPEAKER-3	GOVERN	1	Government	Quantity	
SPEAKER-5	EVAL-1	1	Audio Visual	Quantity	Text
SPEAKER-6	EVAL-1	1	Add to Seminar?	Not Used	Text
SPEAKER-1	EVAL-2	5	Quality of Presentation	Quantity	Text
SPEAKER-2		5	Speaker 2	Id	Text
SPEAKER-2	EVAL-2	5	Quality of Presentation	Quantity	Text
SPEAKER-3	INDUS	5	Industrial	Quantity	
SPEAKER-5	EVAL-2	5	Facility	Quantity	Text
SPEAKER-6	EVAL-2	5	Eliminate from Seminar?	Not Used	Text
ROOM-A/V	PROJ	10	Projector	Check Mark	Text
ROOM-F&B		10	Food & Beverage	Not Used	
SPEAKER-3		10	Participant Profile	Not Used	
SPEAKER-3	LOCAL	10	Local	Quantity	
SPEAKER-5	EVAL-3	10	Meals	Quantity	Text
SPEAKER-1	EVAL-3	15	Handout Materials	Quantity	Text
SPEAKER-2	EVAL-3	15	Handout Materials	Quantity	Text

Admin Console: Continuum > Events and Orders Reports > Event reports > Planning > Standard Resources

Desktop: Events > Generate reports > Planning > Standard Resources

Tickets report

This report prints tickets for ticketed events for output on a laser printer.



Admin Console: Continuum > Events and Orders Reports > Event reports > Tickets > Tickets (demonstration style) Desktop: Events > Generate reports > Tickets > Tickets (demonstration style)

Room Setup report

Admin Console: Home > Events > Define an event, double-click an event, double-click an event function, click More> Plan, and click Print

Desktop: Events, select Define an event, double-click an event, double-click an event function, click More> Plan, and click Print

Speaker Evaluation report

You can use several meeting reports to organize the requirements and evaluations before and after the event takes place. This report generates a current snapshot of the function's speaker data.

Room Setup Report as of October 26th, 2001

Page 1

Advanced Solutions International, Inc.

Meeting: *Boston Annual Meeting in the Spring* — *Atlanta, GA*

Function: *Combating Stress on the Job* — *12/11/2001 2:00 PM* *December 11th, 2001*

Times
Set-Up Post Begin 2:00 PM End 4:00 PM

Attendance
Expect 0 Registered 4 Guarantee 0 Set 0 Actual 0

Speaker 2
153 Mr. John J. Colby, CPA

Audio Visual
Audio Visual - 10.0000 Mr. John J. Colby, CPA

Admin Console: Home > Events > Define an event, double-click an event, double-click an event function, click More> Speakers, and click Print
Desktop: Events, select Define an event, double-click an event, double-click an event function, click More> Speakers, and click Print

While the event is open, use the Room Setup report to view function-level speaker data (evaluation criteria, scores, and comments recorded).

Using Hotel Room Reports

The three hotel room reports together provide a comprehensive packet to give to hotel personnel. They itemize the room assignments, the room sharing requested, and the changes that occurred throughout the event registration. These reports are:

- Hotel Room Bookings/Availability
- Hotel Room Change Roster
- Hotel Room Roster

The Hotel Room Roster has an option for including phone numbers, which adds the telephone number of the person with whom to confirm the reservation.

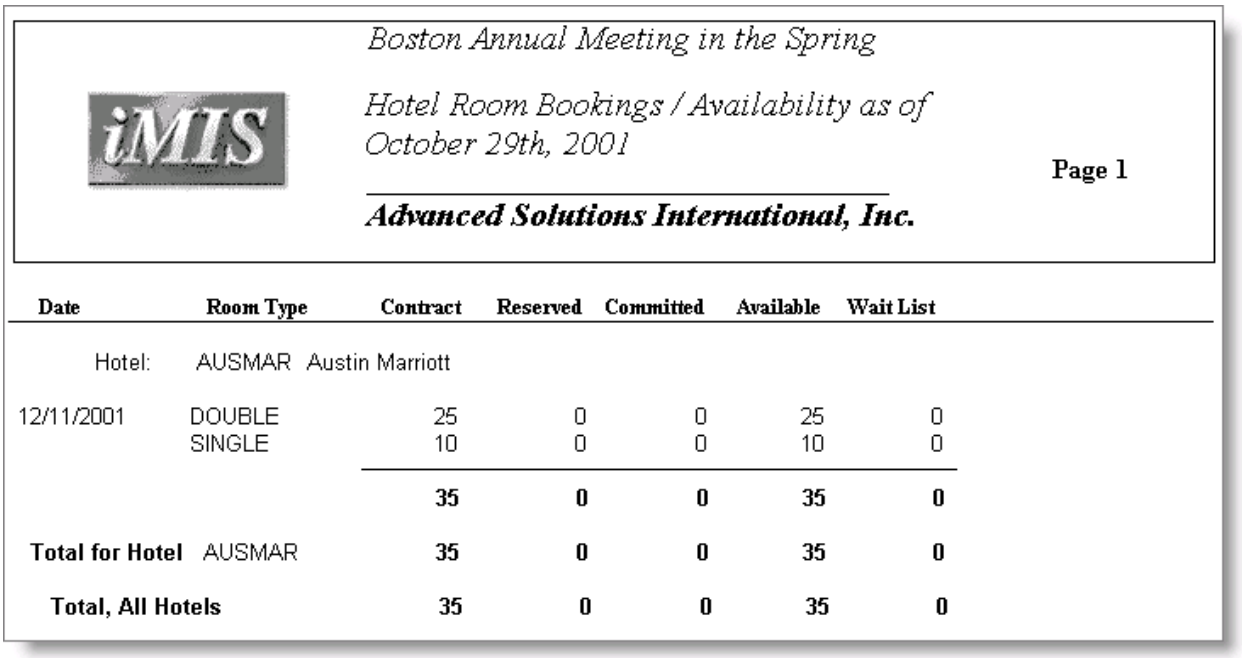
To report on sharing of multiple rooms

If a primary room holder registers multiple rooms and then shares these rooms, each room appears as a separate event function with the appropriate pricing, and all people sharing with the primary room holder appear under both functions in the report.

Therefore, individuals can appear twice in the Hotel Room Roster report and be shown as sharing both of these functions. The primary room holder is responsible for allocating those rooms within hotel regulations.

Hotel Room Bookings/Availability report

This report shows the number of rooms contracted for the event, and the number of rooms that are currently shown as reserved, committed, available, or on a wait list.



Boston Annual Meeting in the Spring

Hotel Room Bookings / Availability as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

Date	Room Type	Contract	Reserved	Committed	Available	Wait List
Hotel:	AUSMAR Austin Marriott					
12/11/2001	DOUBLE	25	0	0	25	0
	SINGLE	10	0	0	10	0
		35	**0**	**0**	**35**	**0**
Total for Hotel	AUSMAR	**35**	**0**	**0**	**35**	**0**
Total, All Hotels		**35**	**0**	**0**	**35**	**0**

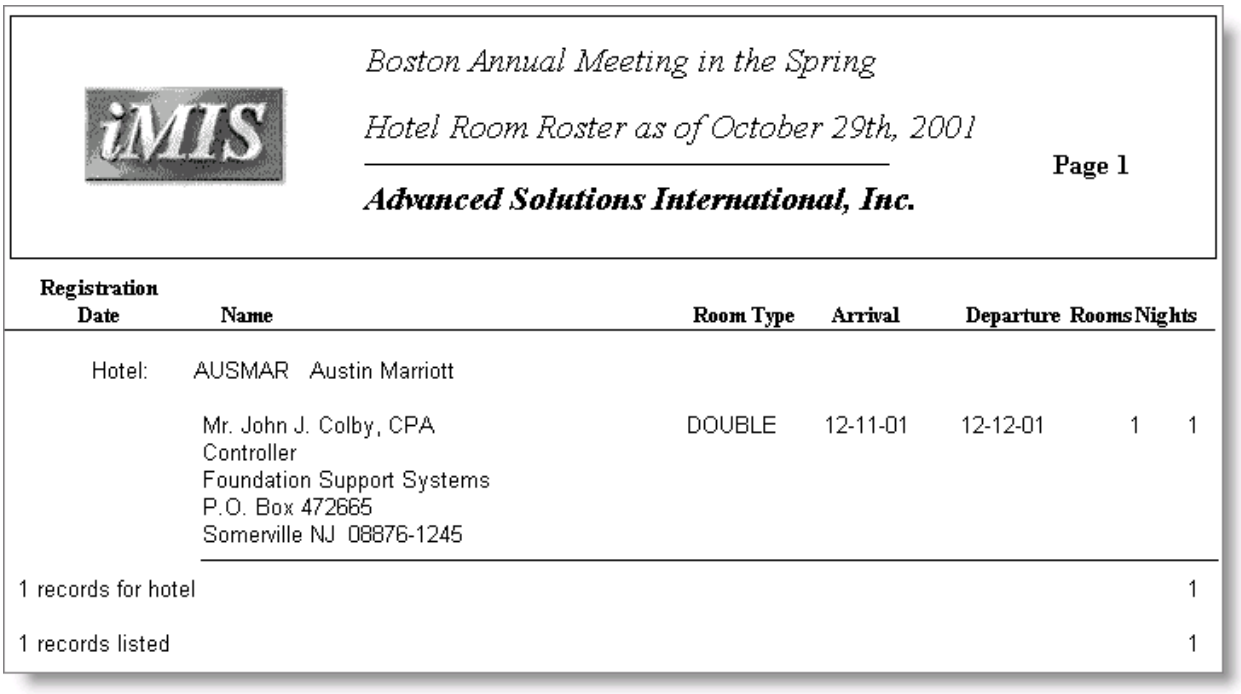
Admin Console: Continuum > Events and Orders Reports > Event reports > Hotel > Hotel Room Bookings / Availability

Desktop: Events > Generate reports > Hotel > Hotel Room Bookings/Availability

Hotel Room Roster report

If you have entered Arrival and Departure dates for all individuals, you can generate the Hotel Room Roster report to get a complete breakdown of who is sharing a room at any one time. Notice that the arrival and departure dates are mandatory only if registering for a room.

iMIS does not warn or control how many people share a room because every hotel has its own rules and capabilities to accommodate this. Instead, generate a Hotel Room Roster report, which allows a hotel auditor to see who is sharing a room and when. As the report indicates, pricing is not split between sharing registrants; billing for the room goes to the primary registrant.



Boston Annual Meeting in the Spring

Hotel Room Roster as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

Registration Date	Name	Room Type	Arrival	Departure	Rooms	Nights
Hotel:	AUSMAR Austin Marriott					
	Mr. John J. Colby, CPA Controller Foundation Support Systems P.O. Box 472665 Somerville NJ 08876-1245	DOUBLE	12-11-01	12-12-01	1	1
1 records for hotel						1
1 records listed						1

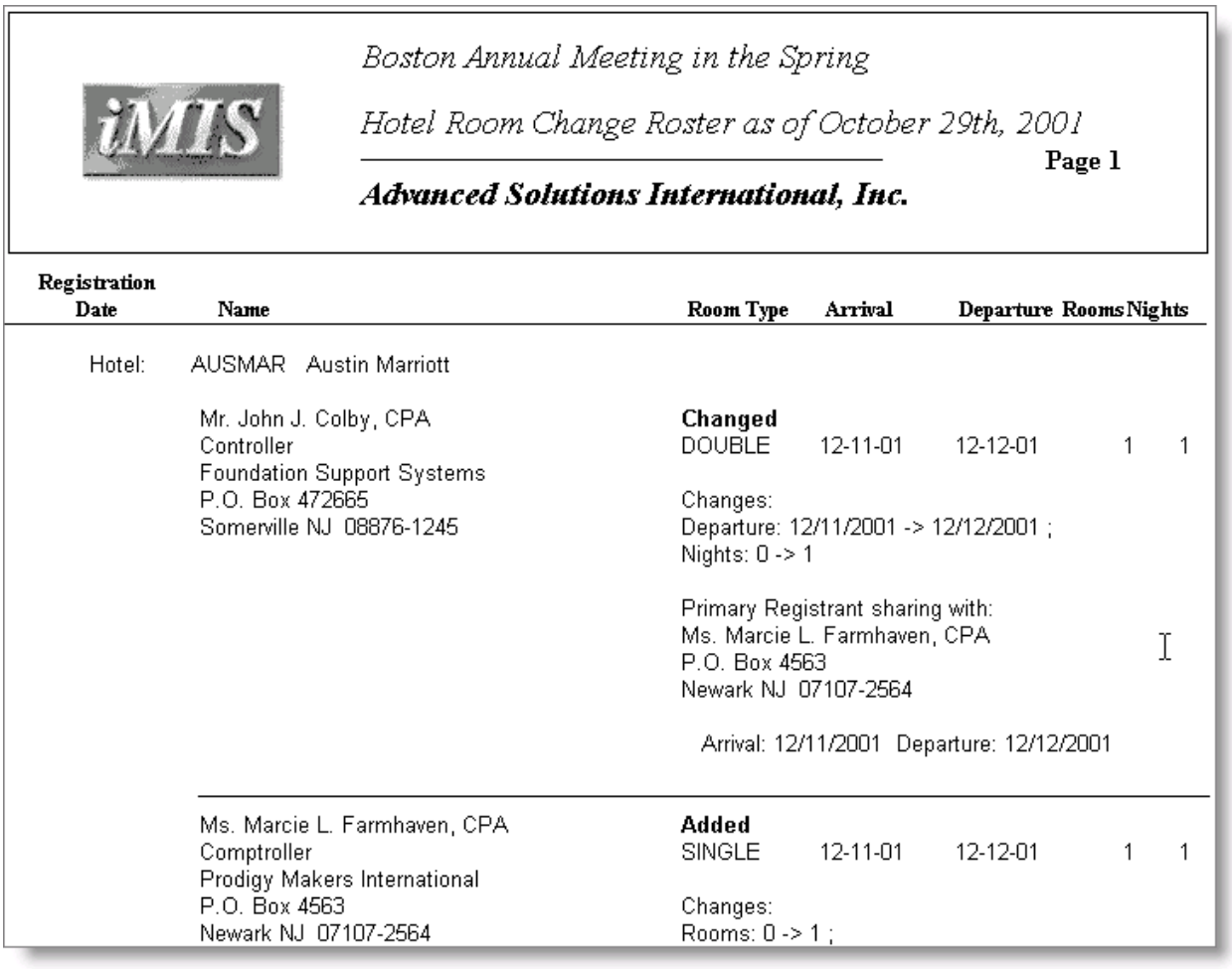
Admin Console: Continuum > Events and Orders Reports > Event reports > Hotel Room Roster

Desktop: Events > Generate reports > Hotel > Hotel Room Roster

Hotel Room Change Roster report

The Hotel Room Change Roster report records housing cancellations. This report sorts registrations by their Added, Changed, or Dropped status.

If a couple is in the Dropped section, you also see them in the Added section, because they had to register for a room to be able to cancel that room. They will also be listed in the Changed section if they had a change before they dropped.



Boston Annual Meeting in the Spring

Hotel Room Change Roster as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

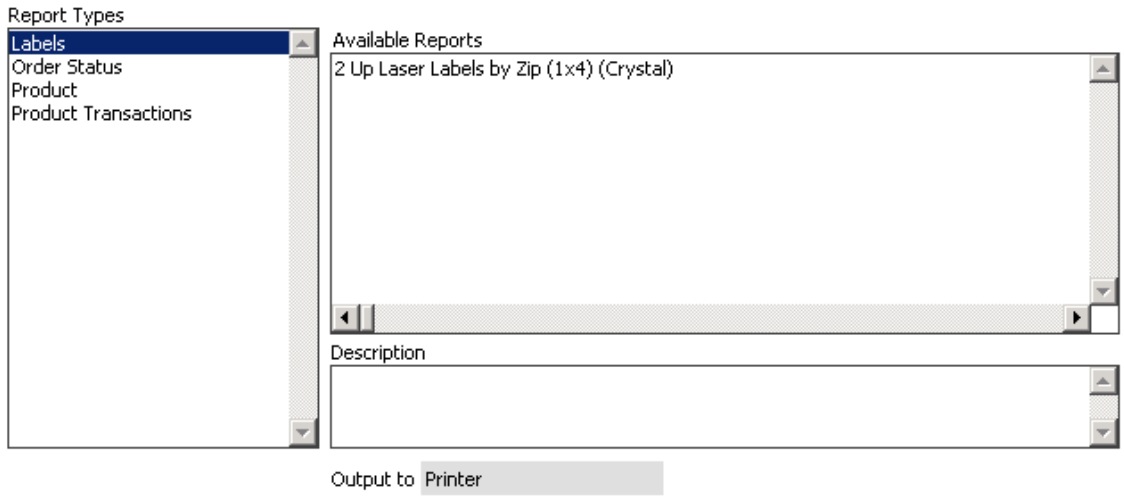
Registration Date	Name	Room Type	Arrival	Departure	Rooms	Nights
Hotel:	AUSMAR Austin Marriott					
	Mr. John J. Colby, CPA Controller Foundation Support Systems P.O. Box 472665 Somerville NJ 08876-1245	**Changed** DOUBLE	12-11-01	12-12-01	1	1
		Changes: Departure: 12/11/2001 -> 12/12/2001 ; Nights: 0 -> 1				
		Primary Registrant sharing with: Ms. Marcie L. Farmhaven, CPA P.O. Box 4563 Newark NJ 07107-2564				
		Arrival: 12/11/2001 Departure: 12/12/2001				
	Ms. Marcie L. Farmhaven, CPA Comptroller Prodigy Makers International P.O. Box 4563 Newark NJ 07107-2564	**Added** SINGLE	12-11-01	12-12-01	1	1
		Changes: Rooms: 0 -> 1 ;				

Admin Console: Continuum > Events and Orders Reports > Event reports > Hotel > Hotel Room Change Roster

Desktop: Events > Generate reports > Hotel > Hotel Room Change Roster

Order Processing Reports

Order processing reports window



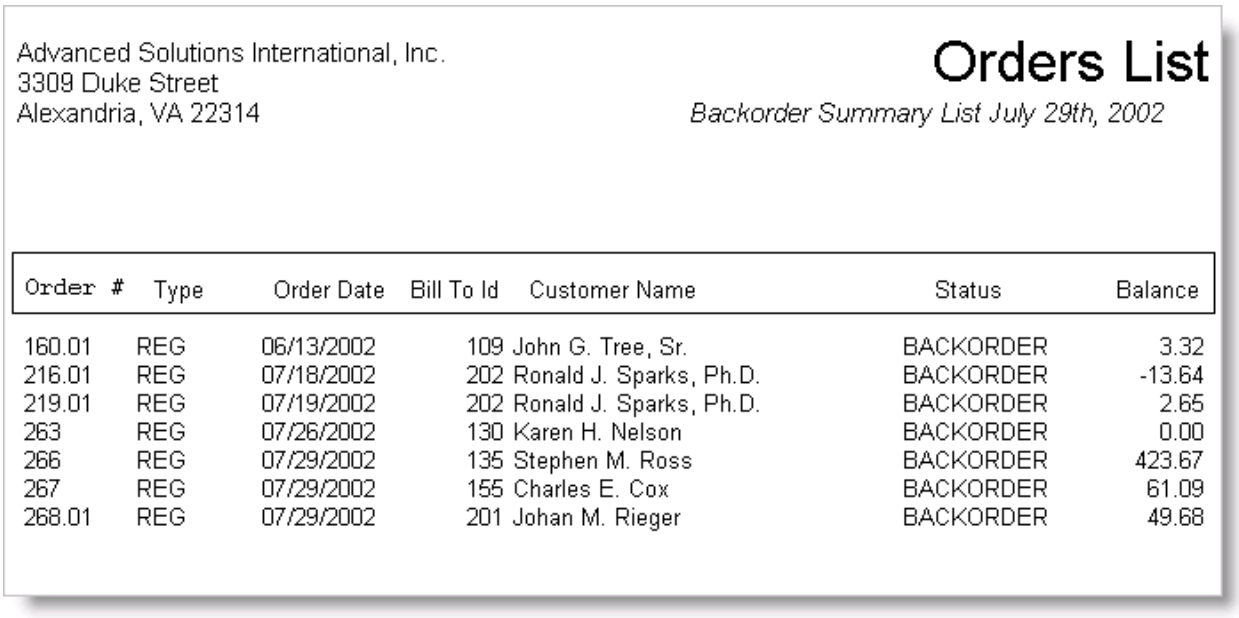
Admin Console: Continuum > Events and Orders Reports > Order processing reports

Desktop: Orders > Generate reports

Sample Order reports

Backorder report

The Backorder Summary List report lists all of the orders with a status of BACKORDER.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Orders List

Backorder Summary List July 29th, 2002

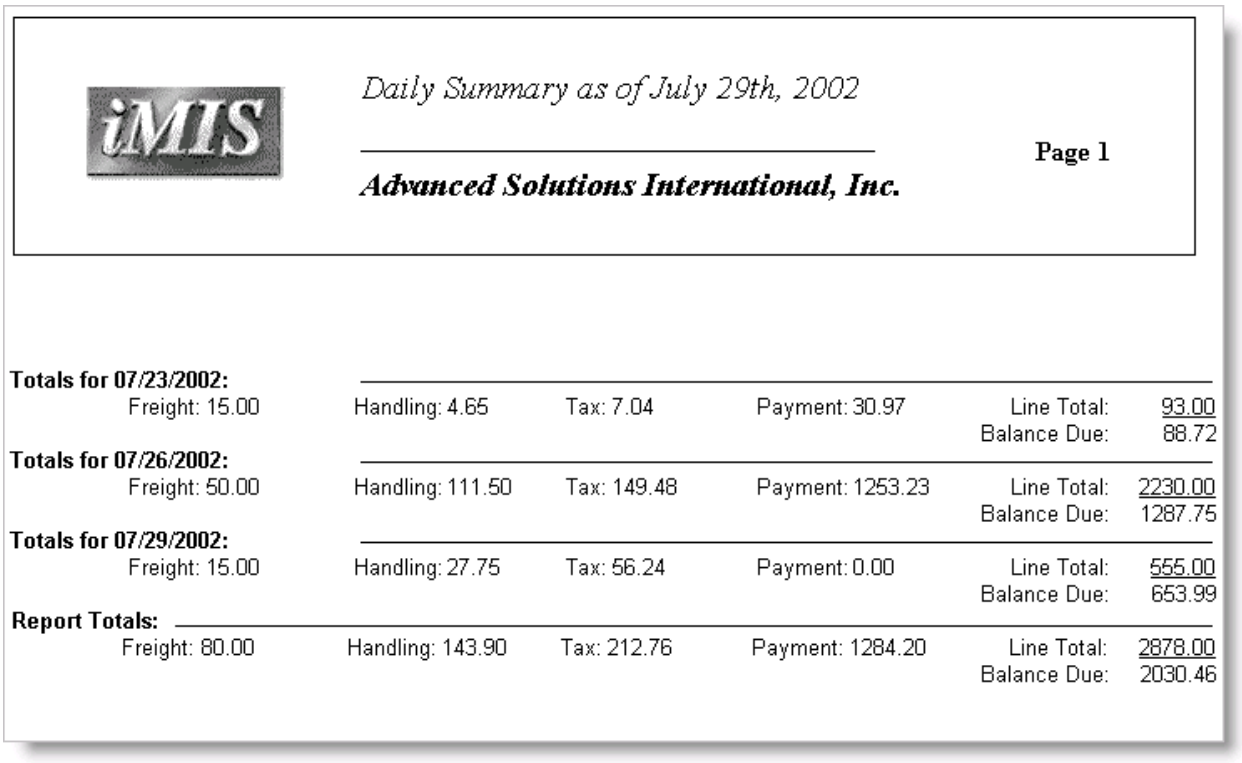
Order #	Type	Order Date	Bill To Id	Customer Name	Status	Balance
160.01	REG	06/13/2002	109	John G. Tree, Sr.	BACKORDER	3.32
216.01	REG	07/18/2002	202	Ronald J. Sparks, Ph.D.	BACKORDER	-13.64
219.01	REG	07/19/2002	202	Ronald J. Sparks, Ph.D.	BACKORDER	2.65
263	REG	07/26/2002	130	Karen H. Nelson	BACKORDER	0.00
266	REG	07/29/2002	135	Stephen M. Ross	BACKORDER	423.67
267	REG	07/29/2002	155	Charles E. Cox	BACKORDER	61.09
268.01	REG	07/29/2002	201	Johan M. Rieger	BACKORDER	49.68

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Backorder Summary List

Desktop: Orders > Generate reports > Order Status> Backorder Summary List > and click Run

Daily Summary report

The Daily Summary report lists a daily summary of all order activities. You can print a report for either a single date or a series of dates.



Daily Summary as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

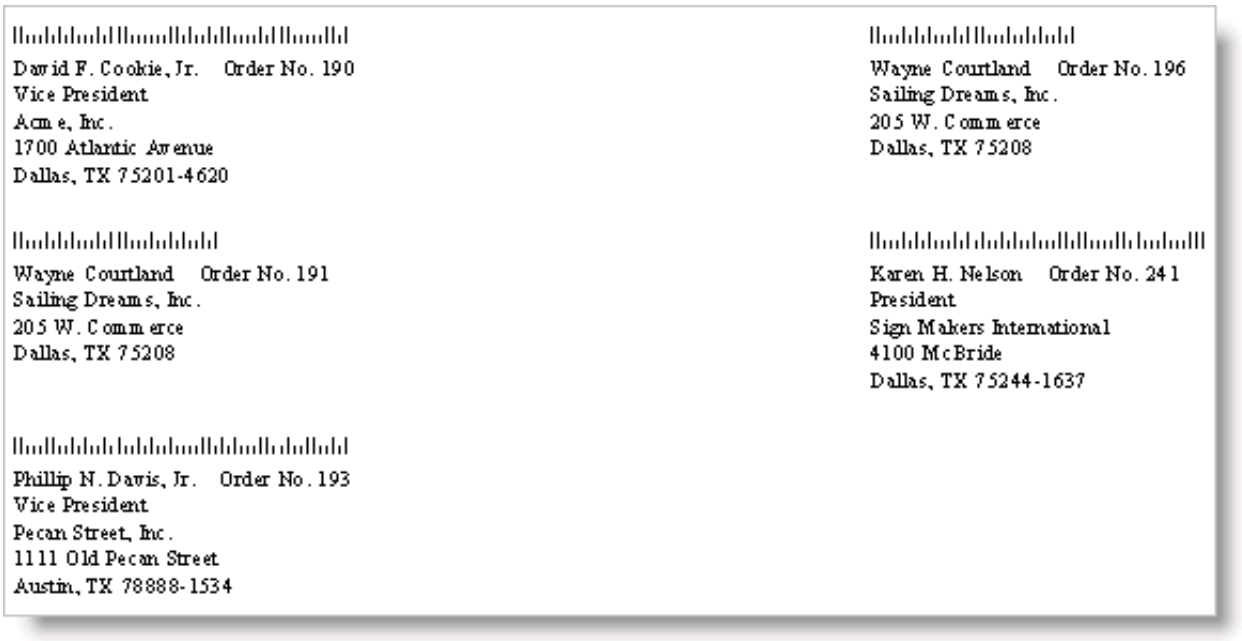
Totals for 07/23/2002:					
Freight: 15.00	Handling: 4.65	Tax: 7.04	Payment: 30.97	Line Total:	93.00
				Balance Due:	88.72
Totals for 07/26/2002:					
Freight: 50.00	Handling: 111.50	Tax: 149.48	Payment: 1253.23	Line Total:	2230.00
				Balance Due:	1287.75
Totals for 07/29/2002:					
Freight: 15.00	Handling: 27.75	Tax: 56.24	Payment: 0.00	Line Total:	555.00
				Balance Due:	653.99
Report Totals:					
Freight: 80.00	Handling: 143.90	Tax: 212.76	Payment: 1284.20	Line Total:	2878.00
				Balance Due:	2030.46

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Daily Summary

Desktop: Orders > Generate reports > Order Status > Daily Summary, click Run, select the date range, and click OK

Label report

The Label report prints shipping labels for orders with an order status of SHIPMENT.

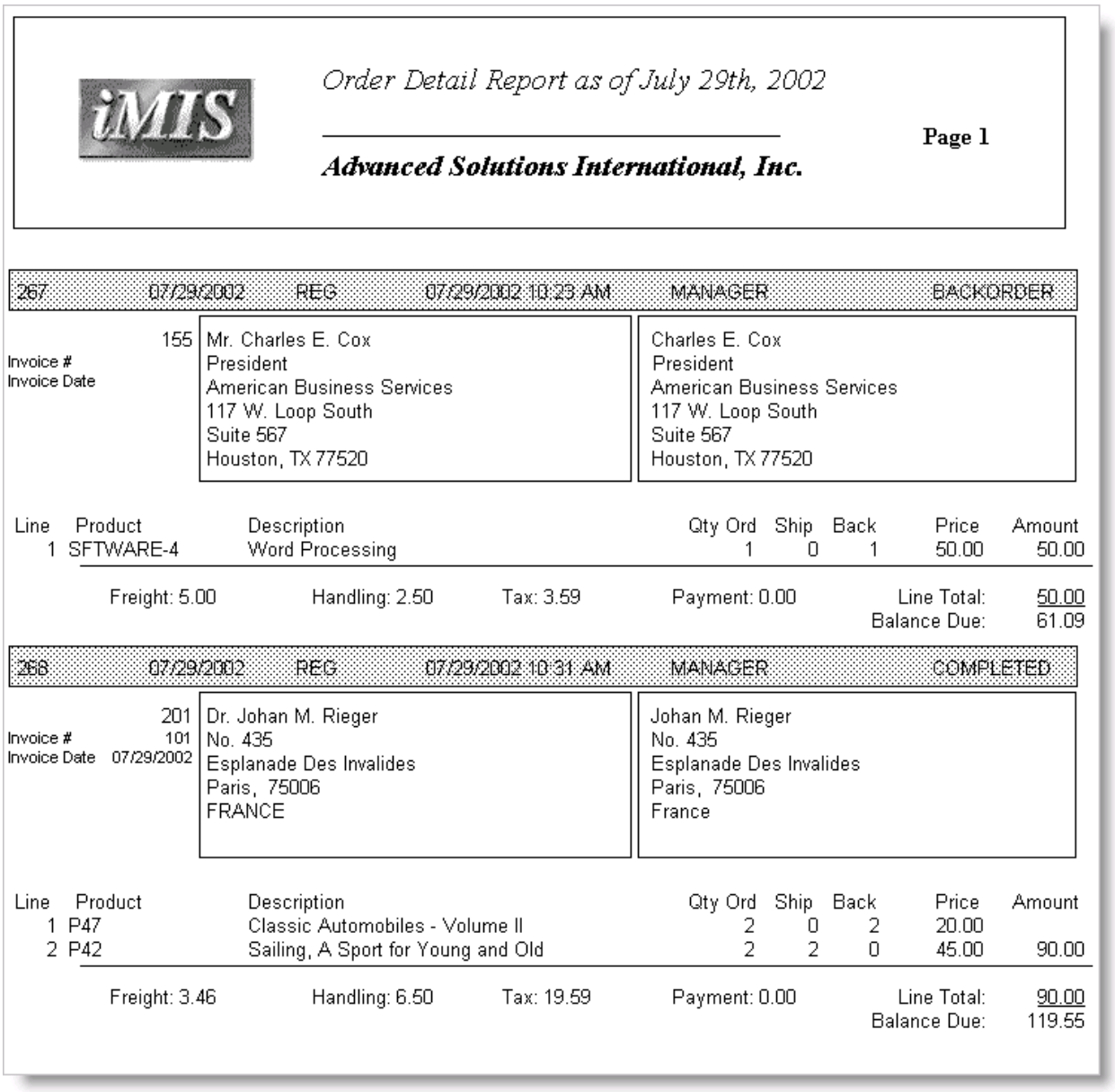


Admin Console: Continuum > Events and Orders Reports > Order processing reports > Labels

Desktop: Orders > Generate reports > Labels, select the available label report, and click Run

Order Detail report

The Order Detail report lists all of the orders for a selected date range. If you want to generate a select group of orders, reports can be generated according to status, status and type, order batch, and orders on hold.



Order Detail Report as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

267 07/29/2002 REG 07/29/2002 10:23 AM MANAGER BACKORDER

155
Invoice #
Invoice Date

Mr. Charles E. Cox
President
American Business Services
117 W. Loop South
Suite 567
Houston, TX 77520

Charles E. Cox
President
American Business Services
117 W. Loop South
Suite 567
Houston, TX 77520

Line	Product	Description	Qty Ord	Ship	Back	Price	Amount
1	SFTWARE-4	Word Processing	1	0	1	50.00	50.00

Freight: 5.00 Handling: 2.50 Tax: 3.59 Payment: 0.00 Line Total: 50.00
Balance Due: 61.09

268 07/29/2002 REG 07/29/2002 10:31 AM MANAGER COMPLETED

201
Invoice # 101
Invoice Date 07/29/2002

Dr. Johan M. Rieger
No. 435
Esplanade Des Invalides
Paris, 75006
FRANCE

Johan M. Rieger
No. 435
Esplanade Des Invalides
Paris, 75006
France

Line	Product	Description	Qty Ord	Ship	Back	Price	Amount
1	P47	Classic Automobiles - Volume II	2	0	2	20.00	
2	P42	Sailing, A Sport for Young and Old	2	2	0	45.00	90.00

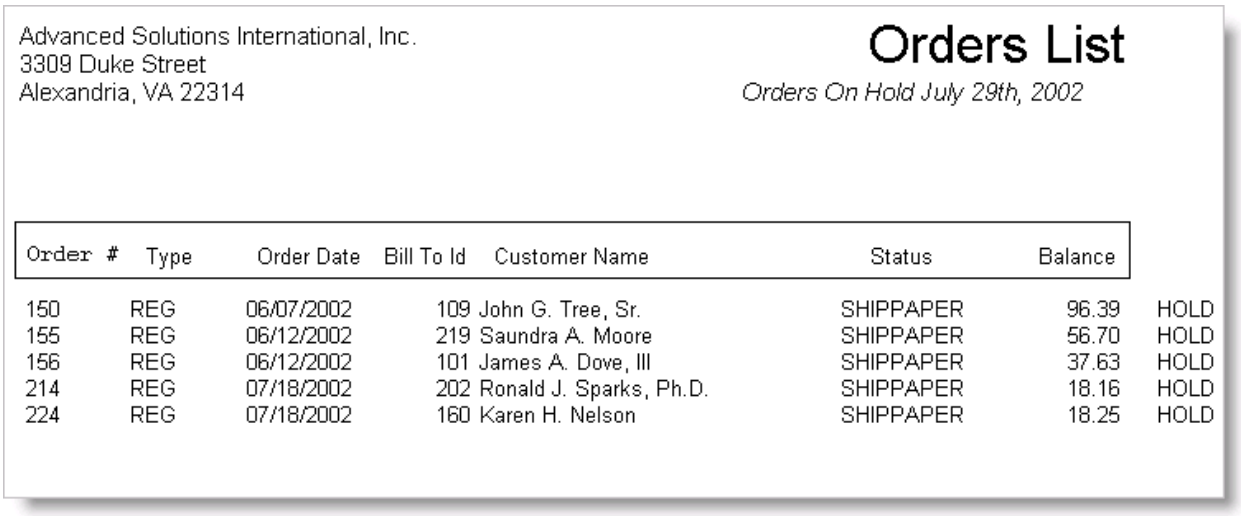
Freight: 3.46 Handling: 6.50 Tax: 19.59 Payment: 0.00 Line Total: 90.00
Balance Due: 119.55

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Order Detail Report

Desktop: Orders > Generate reports > Order Status > Order Detail Report, click Run, click, select the date range, and click OK

Orders On Hold report

The Orders On Hold report lists all of the orders that are on hold.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Orders List

Orders On Hold July 29th, 2002

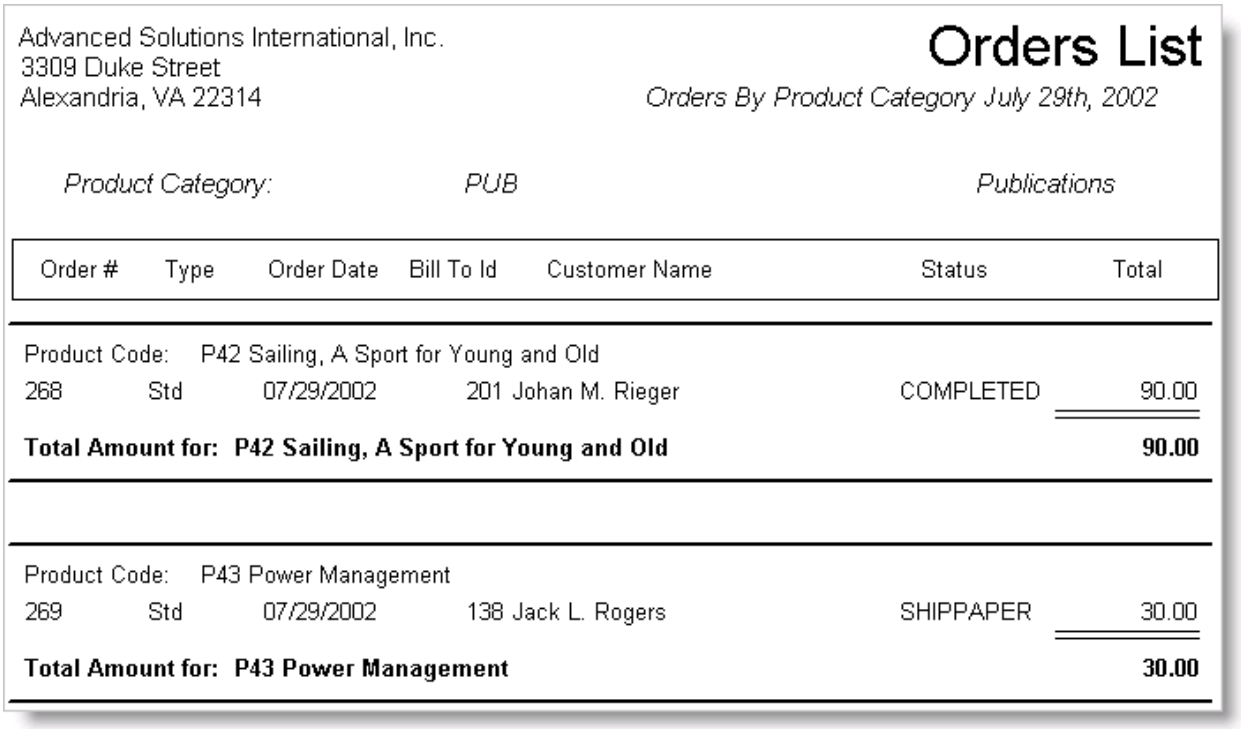
Order #	Type	Order Date	Bill To Id	Customer Name	Status	Balance	
150	REG	06/07/2002	109	John G. Tree, Sr.	SHIPPAPER	96.39	HOLD
155	REG	06/12/2002	219	Saundra A. Moore	SHIPPAPER	56.70	HOLD
156	REG	06/12/2002	101	James A. Dove, III	SHIPPAPER	37.63	HOLD
214	REG	07/18/2002	202	Ronald J. Sparks, Ph.D.	SHIPPAPER	18.16	HOLD
224	REG	07/18/2002	160	Karen H. Nelson	SHIPPAPER	18.25	HOLD

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Orders On Hold

Desktop: Orders > Generate reports > Order Status > Orders on Hold, and click Run

Orders by Product Category report

The Orders by Product Category report lists all orders within a specified date range for a specified product category.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Orders List

Orders By Product Category July 29th, 2002

Product Category: *PUB* *Publications*

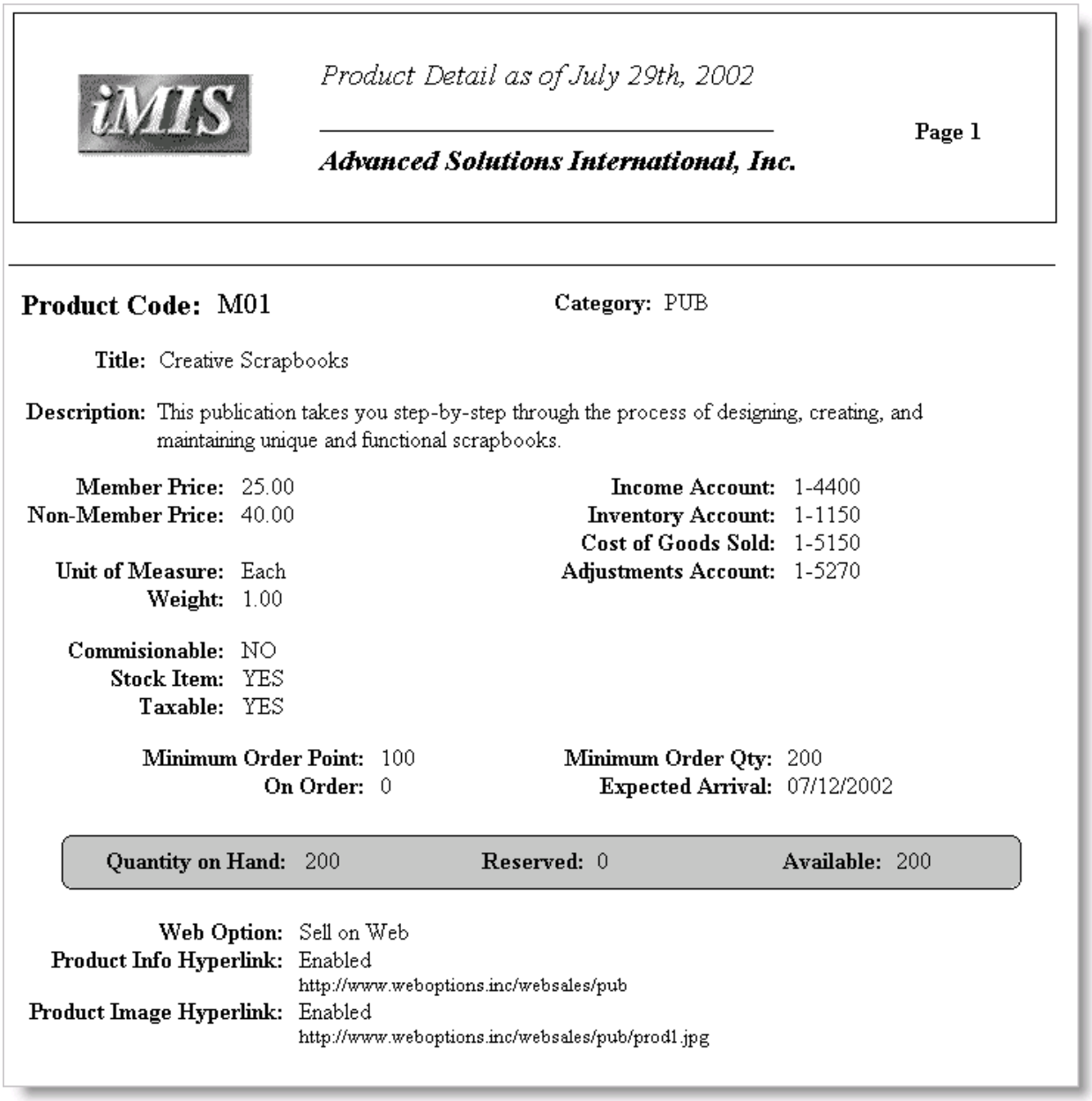
Order #	Type	Order Date	Bill To Id	Customer Name	Status	Total
Product Code: P42 Sailing, A Sport for Young and Old						
268	Std	07/29/2002	201	Johan M. Rieger	COMPLETED	90.00
Total Amount for: P42 Sailing, A Sport for Young and Old						**90.00**
Product Code: P43 Power Management						
269	Std	07/29/2002	138	Jack L. Rogers	SHIPPAPER	30.00
Total Amount for: P43 Power Management						**30.00**

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Orders by Product Category

Desktop: Orders > Generate reports > Product > Orders by Product Category, click Run, select a date range and product category, and click OK

Product Detail report

The Product Detail report lists the details you have defined for each of your products.



Product Detail as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Product Code: M01 **Category:** PUB

Title: Creative Scrapbooks

Description: This publication takes you step-by-step through the process of designing, creating, and maintaining unique and functional scrapbooks.

Member Price: 25.00
Non-Member Price: 40.00

Unit of Measure: Each
Weight: 1.00

Commisionable: NO
Stock Item: YES
Taxable: YES

Income Account: 1-4400
Inventory Account: 1-1150
Cost of Goods Sold: 1-5150
Adjustments Account: 1-5270

Minimum Order Point: 100
On Order: 0

Minimum Order Qty: 200
Expected Arrival: 07/12/2002

Quantity on Hand: 200 **Reserved:** 0 **Available:** 200

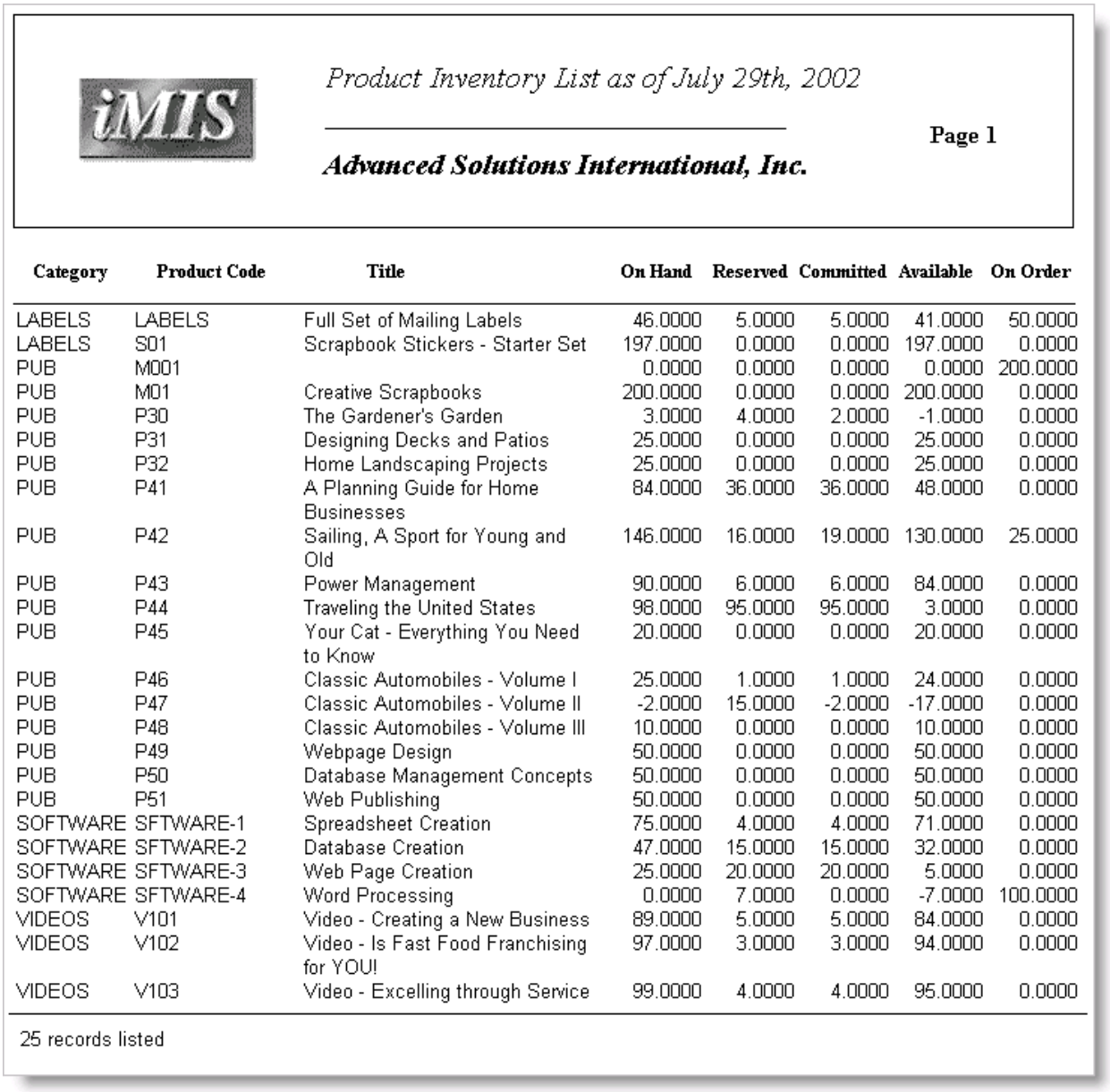
Web Option: Sell on Web
Product Info Hyperlink: Enabled
http://www.weboptions.inc/websales/pub
Product Image Hyperlink: Enabled
http://www.weboptions.inc/websales/pub/prod1.jpg

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Detail

Desktop: Orders > Generate reports > Product > Product Detail, and click Run

Product Inventory List report

The Product Inventory List report lists all of your products and each product's inventory levels. You can generate a list for products that are on hand or for all of the products that your organization offers for sale. You also have the option of sorting the products by either product category or product code.



Product Inventory List as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Category	Product Code	Title	On Hand	Reserved	Committed	Available	On Order
LABELS	LABELS	Full Set of Mailing Labels	46.0000	5.0000	5.0000	41.0000	50.0000
LABELS	S01	Scrapbook Stickers - Starter Set	197.0000	0.0000	0.0000	197.0000	0.0000
PUB	M001		0.0000	0.0000	0.0000	0.0000	200.0000
PUB	M01	Creative Scrapbooks	200.0000	0.0000	0.0000	200.0000	0.0000
PUB	P30	The Gardener's Garden	3.0000	4.0000	2.0000	-1.0000	0.0000
PUB	P31	Designing Decks and Patios	25.0000	0.0000	0.0000	25.0000	0.0000
PUB	P32	Home Landscaping Projects	25.0000	0.0000	0.0000	25.0000	0.0000
PUB	P41	A Planning Guide for Home Businesses	84.0000	36.0000	36.0000	48.0000	0.0000
PUB	P42	Sailing, A Sport for Young and Old	146.0000	16.0000	19.0000	130.0000	25.0000
PUB	P43	Power Management	90.0000	6.0000	6.0000	84.0000	0.0000
PUB	P44	Traveling the United States	98.0000	95.0000	95.0000	3.0000	0.0000
PUB	P45	Your Cat - Everything You Need to Know	20.0000	0.0000	0.0000	20.0000	0.0000
PUB	P46	Classic Automobiles - Volume I	25.0000	1.0000	1.0000	24.0000	0.0000
PUB	P47	Classic Automobiles - Volume II	-2.0000	15.0000	-2.0000	-17.0000	0.0000
PUB	P48	Classic Automobiles - Volume III	10.0000	0.0000	0.0000	10.0000	0.0000
PUB	P49	Webpage Design	50.0000	0.0000	0.0000	50.0000	0.0000
PUB	P50	Database Management Concepts	50.0000	0.0000	0.0000	50.0000	0.0000
PUB	P51	Web Publishing	50.0000	0.0000	0.0000	50.0000	0.0000
SOFTWARE	SFTWARE-1	Spreadsheet Creation	75.0000	4.0000	4.0000	71.0000	0.0000
SOFTWARE	SFTWARE-2	Database Creation	47.0000	15.0000	15.0000	32.0000	0.0000
SOFTWARE	SFTWARE-3	Web Page Creation	25.0000	20.0000	20.0000	5.0000	0.0000
SOFTWARE	SFTWARE-4	Word Processing	0.0000	7.0000	0.0000	-7.0000	100.0000
VIDEOS	V101	Video - Creating a New Business	89.0000	5.0000	5.0000	84.0000	0.0000
VIDEOS	V102	Video - Is Fast Food Franchising for YOU!	97.0000	3.0000	3.0000	94.0000	0.0000
VIDEOS	V103	Video - Excelling through Service	99.0000	4.0000	4.0000	95.0000	0.0000

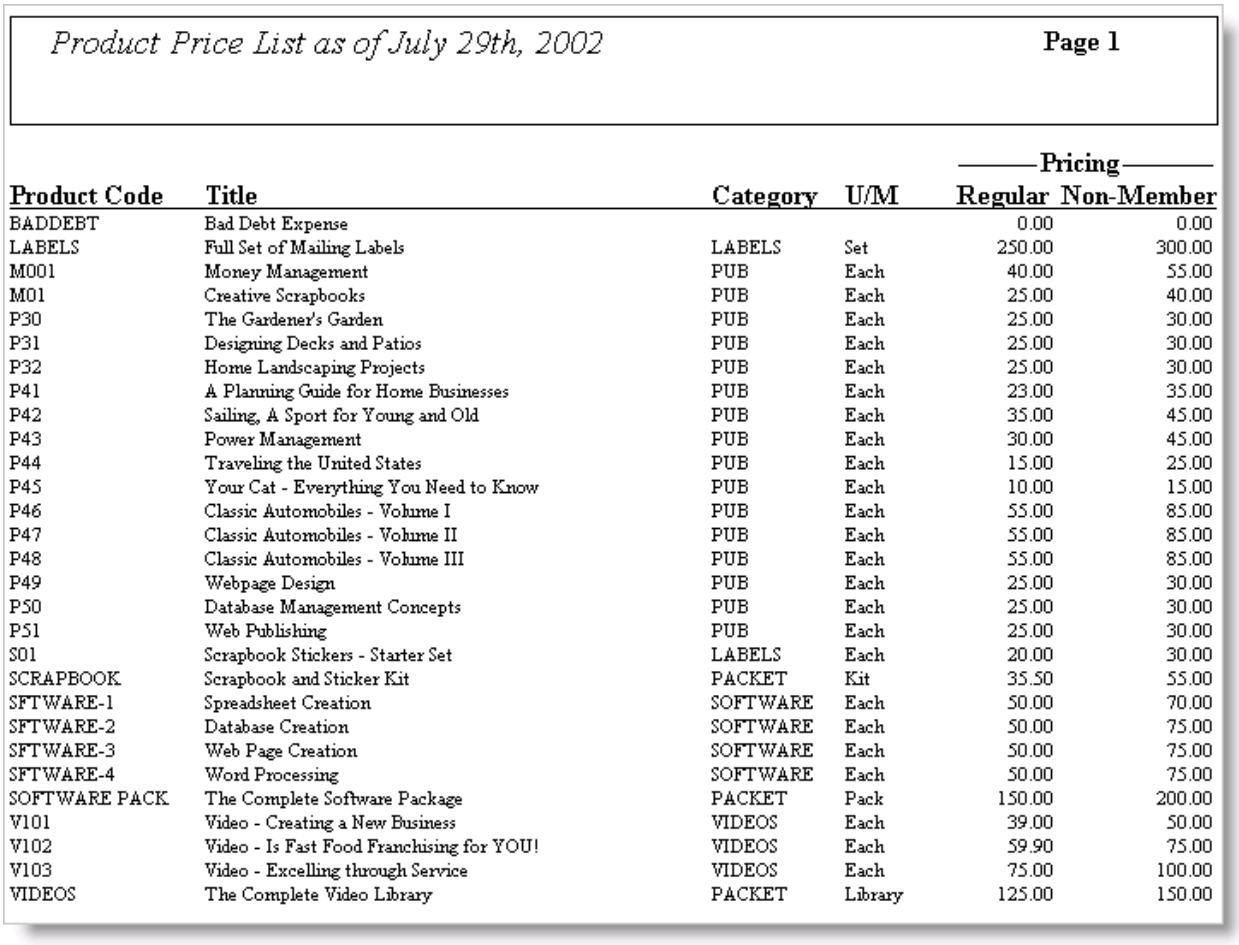
25 records listed

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Inventory List

Desktop: Orders > Generate reports > Product > Product Inventory List, click Run, select which product to include and how to sort the products, and click OK

Product Price List report

The Product Price List report lists the prices for all of your products.



Product Price List as of July 29th, 2002 **Page 1**

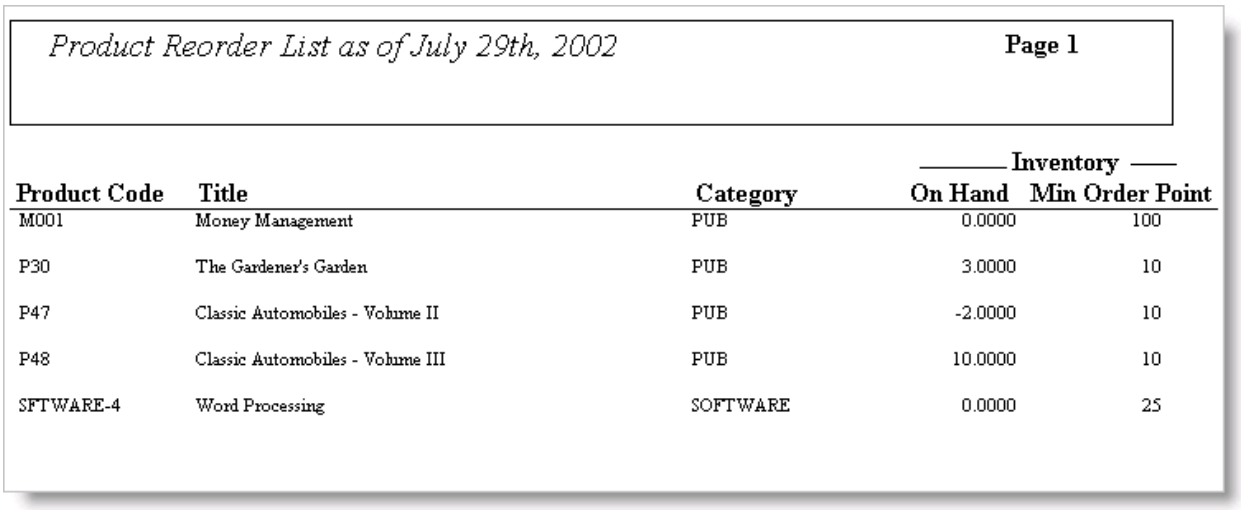
				Pricing	
Product Code	**Title**	**Category**	**U/M**	**Regular**	**Non-Member**
BADDEBT	Bad Debt Expense			0.00	0.00
LABELS	Full Set of Mailing Labels	LABELS	Set	250.00	300.00
M001	Money Management	PUB	Each	40.00	55.00
M01	Creative Scrapbooks	PUB	Each	25.00	40.00
P30	The Gardener's Garden	PUB	Each	25.00	30.00
P31	Designing Decks and Patios	PUB	Each	25.00	30.00
P32	Home Landscaping Projects	PUB	Each	25.00	30.00
P41	A Planning Guide for Home Businesses	PUB	Each	23.00	35.00
P42	Sailing, A Sport for Young and Old	PUB	Each	35.00	45.00
P43	Power Management	PUB	Each	30.00	45.00
P44	Traveling the United States	PUB	Each	15.00	25.00
P45	Your Cat - Everything You Need to Know	PUB	Each	10.00	15.00
P46	Classic Automobiles - Volume I	PUB	Each	55.00	85.00
P47	Classic Automobiles - Volume II	PUB	Each	55.00	85.00
P48	Classic Automobiles - Volume III	PUB	Each	55.00	85.00
P49	Webpage Design	PUB	Each	25.00	30.00
P50	Database Management Concepts	PUB	Each	25.00	30.00
P51	Web Publishing	PUB	Each	25.00	30.00
S01	Scrapbook Stickers - Starter Set	LABELS	Each	20.00	30.00
SCRAPBOOK	Scrapbook and Sticker Kit	PACKET	Kit	35.50	55.00
SFTWARE-1	Spreadsheet Creation	SOFTWARE	Each	50.00	70.00
SFTWARE-2	Database Creation	SOFTWARE	Each	50.00	75.00
SFTWARE-3	Web Page Creation	SOFTWARE	Each	50.00	75.00
SFTWARE-4	Word Processing	SOFTWARE	Each	50.00	75.00
SOFTWARE PACK	The Complete Software Package	PACKET	Pack	150.00	200.00
V101	Video - Creating a New Business	VIDEOS	Each	39.00	50.00
V102	Video - Is Fast Food Franchising for YOU!	VIDEOS	Each	59.90	75.00
V103	Video - Excelling through Service	VIDEOS	Each	75.00	100.00
VIDEOS	The Complete Video Library	PACKET	Library	125.00	150.00

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Price List

Desktop: Orders, select Generate reports > Product > Product Price List, and click Run

Product Reorder List report

The Product Reorder List report lists your products that are at or below the reorder point defined for each product.



Product Reorder List as of July 29th, 2002 **Page 1**

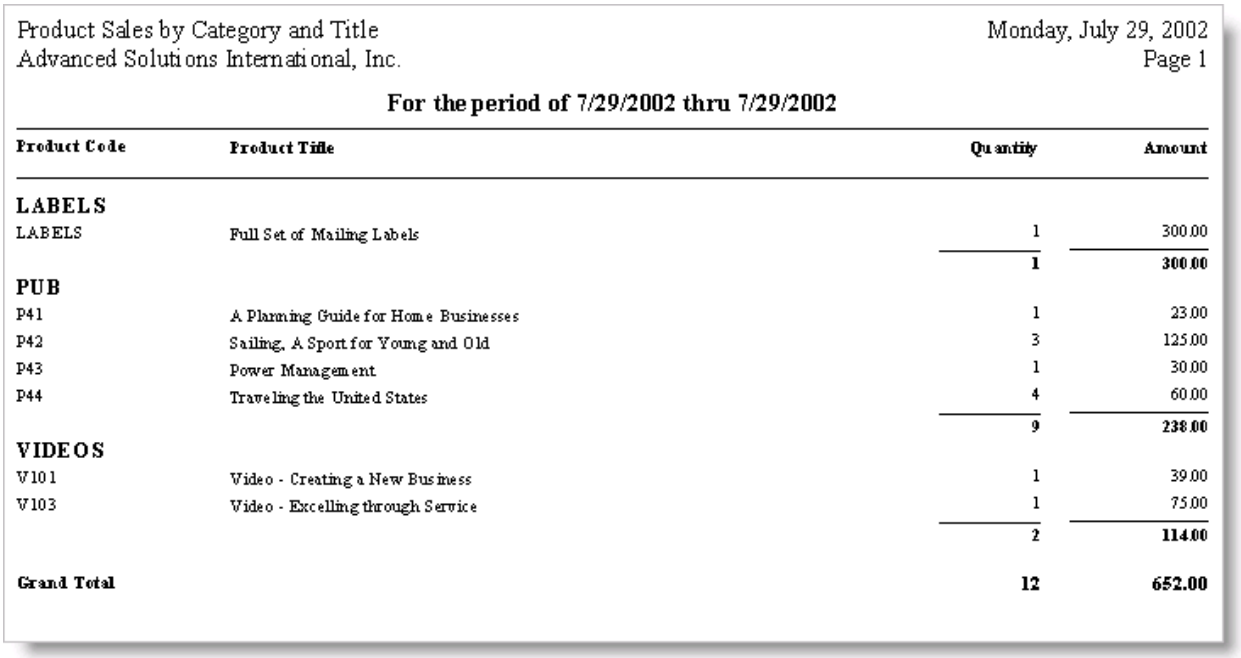
Product Code	Title	Category	Inventory On Hand	Inventory Min Order Point
M001	Money Management	PUB	0.0000	100
P30	The Gardener's Garden	PUB	3.0000	10
P47	Classic Automobiles - Volume II	PUB	-2.0000	10
P48	Classic Automobiles - Volume III	PUB	10.0000	10
SFTWARE-4	Word Processing	SOFTWARE	0.0000	25

Admin Console: Continuum > Events and Orders Report > Order processing reports > Product > Product Reorder List

Desktop: Orders > Generate reports > Product > Product Reorder List, and click Run

Product Sales by Category and Title report

The Product Sales by Category and Title report generates a list of product sales transactions for the date range selected. This report includes only the orders invoiced on the selected date.



Product Sales by Category and Title
Advanced Solutions International, Inc.

Monday, July 29, 2002
Page 1

For the period of 7/29/2002 thru 7/29/2002

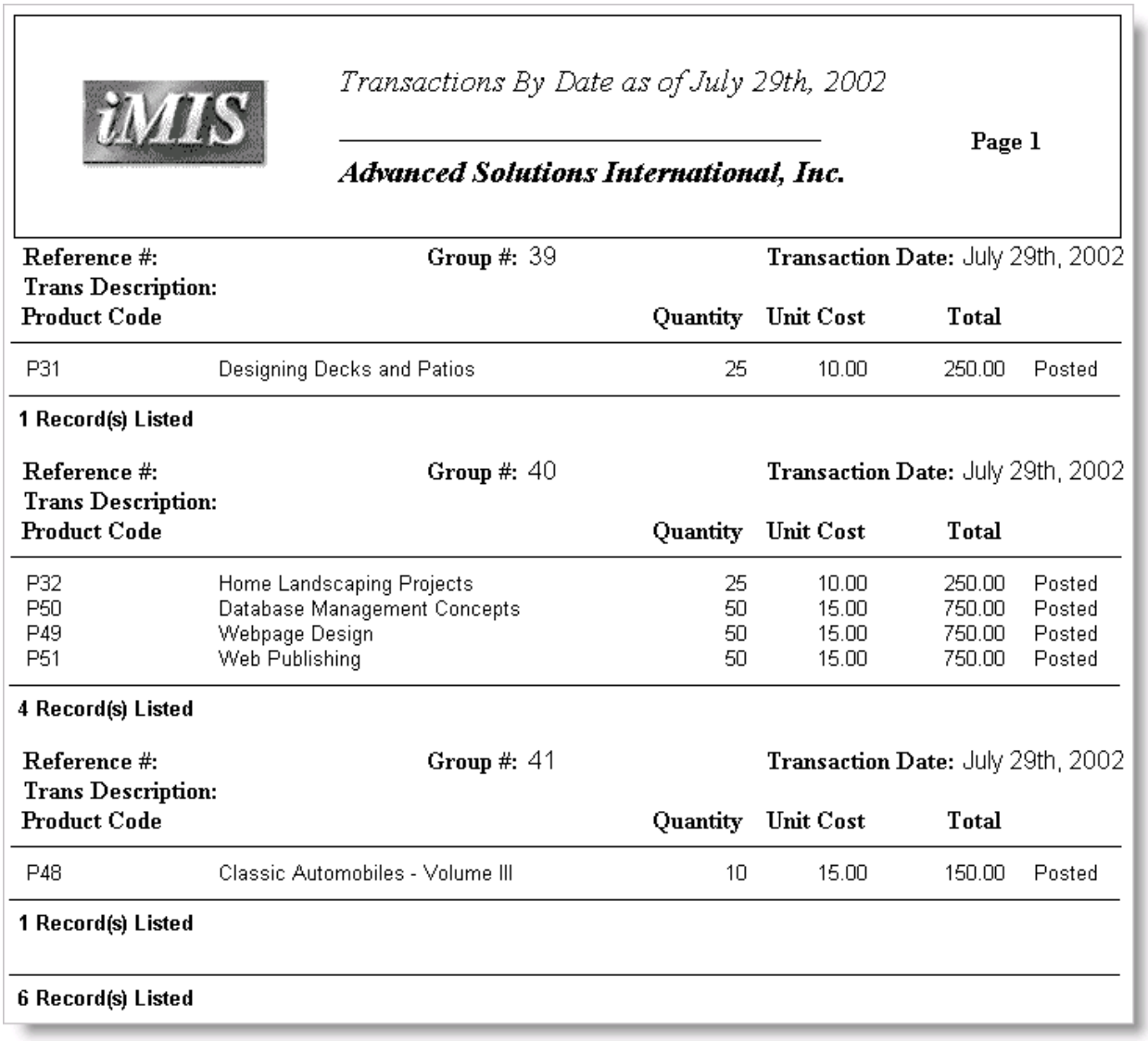
Product Code	Product Title	Quantity	Amount
LABELS			
LABELS	Full Set of Mailing Labels	1	300.00
		1	**300.00**
PUB			
P41	A Planning Guide for Home Businesses	1	23.00
P42	Sailing, A Sport for Young and Old	3	125.00
P43	Power Management	1	30.00
P44	Traveling the United States	4	60.00
		9	**238.00**
VIDEOS			
V101	Video - Creating a New Business	1	39.00
V103	Video - Excelling through Service	1	75.00
		2	**114.00**
Grand Total		**12**	**652.00**

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Sales by Category and Title

Desktop: Orders > Generate reports> Product > Product Sales by Category and Title, click Run, select the date range, and click OK

Transactions by Date report

The Transactions by Date report lists all of the posted product inventory transactions for the selected date range.



Transactions By Date as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Reference #: **Group #:** 39 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total	
P31	Designing Decks and Patios	25	10.00	250.00	Posted

1 Record(s) Listed

Reference #: **Group #:** 40 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total	
P32	Home Landscaping Projects	25	10.00	250.00	Posted
P50	Database Management Concepts	50	15.00	750.00	Posted
P49	Webpage Design	50	15.00	750.00	Posted
P51	Web Publishing	50	15.00	750.00	Posted

4 Record(s) Listed

Reference #: **Group #:** 41 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total	
P48	Classic Automobiles - Volume III	10	15.00	150.00	Posted

1 Record(s) Listed

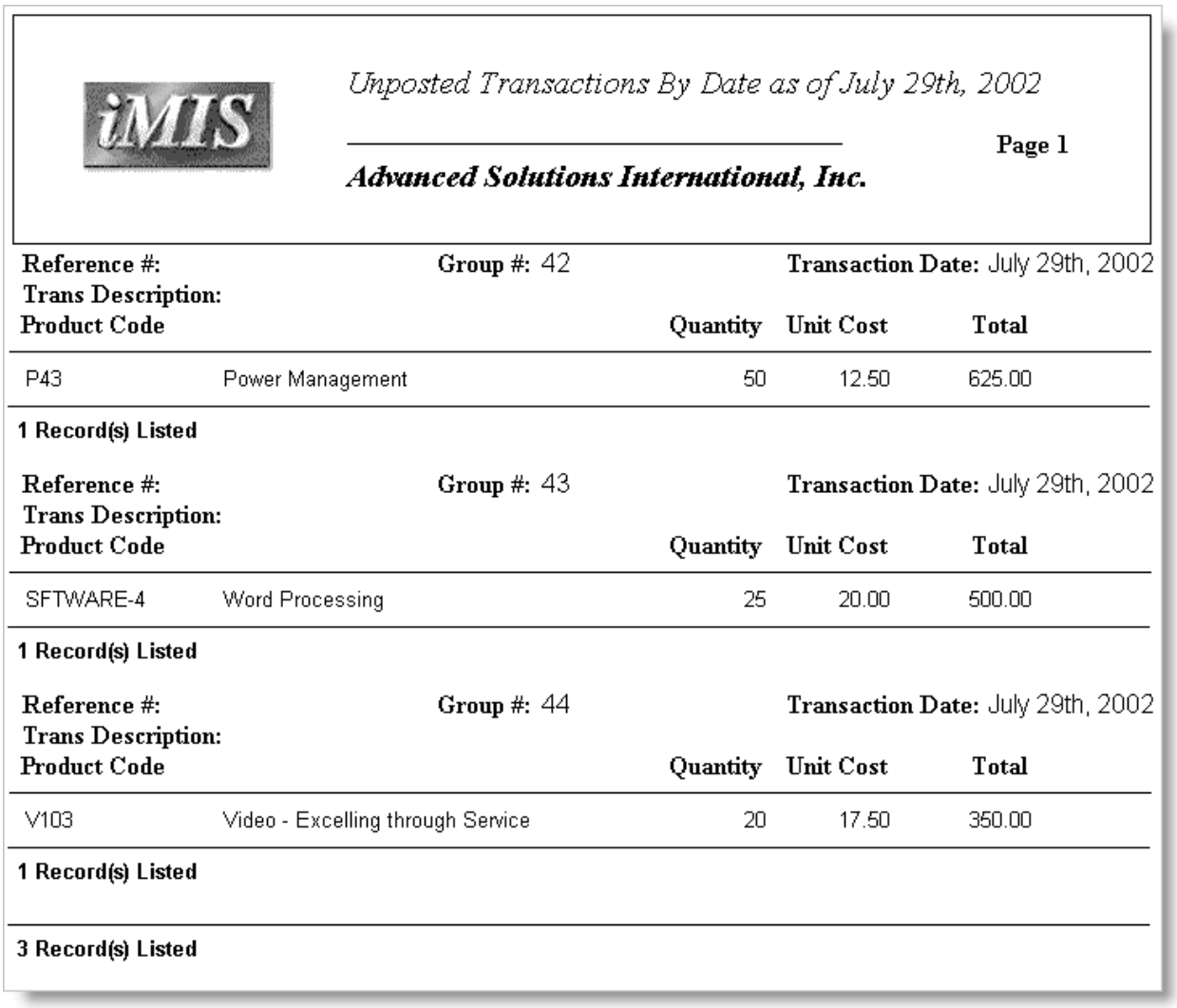
6 Record(s) Listed

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product Transactions > Transactions By Date

Desktop: Orders > Generate reports > Product Transactions > Transactions by Date, click Run, select the date range, and click OK

Unposted Transactions by Date report

The Unposted Transactions by Date report lists all of the non-posted product inventory transactions for the selected date range.



Unposted Transactions By Date as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Reference #: **Group #:** 42 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total
P43	Power Management	50	12.50	625.00

1 Record(s) Listed

Reference #: **Group #:** 43 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total
SFTWARE-4	Word Processing	25	20.00	500.00

1 Record(s) Listed

Reference #: **Group #:** 44 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total
V103	Video - Excelling through Service	20	17.50	350.00

1 Record(s) Listed

3 Record(s) Listed

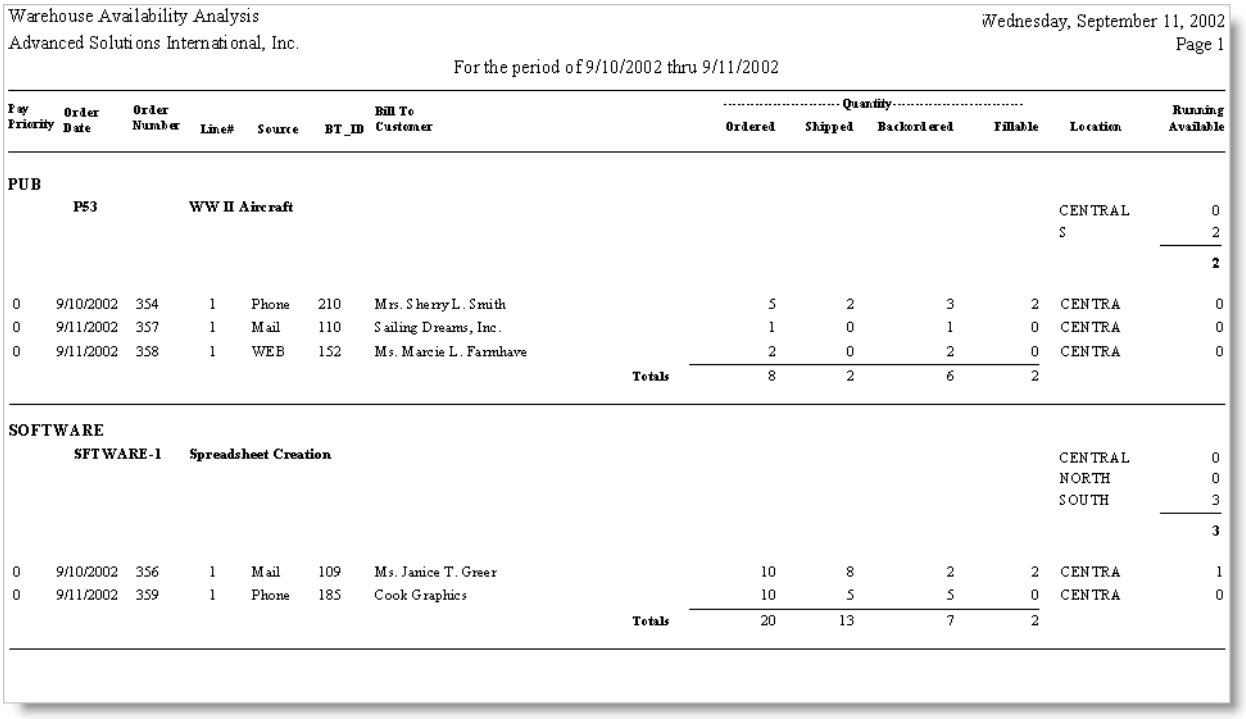
Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product Transactions > Unposted Transactions By Date

Desktop: Orders > Generate reports > Product Transactions > Unposted Transactions by Date, click Run, select the date range, and click OK

Warehouse Availability Analysis report

The Warehouse Availability Analysis report generates a list of order line items for back-ordered products. Separated by products on backorder, each line item lists specific order information including order number, order date, order priority, and product quantity. The product quantity information lists the number of products Ordered, Shipped, Backordered, and Fillable. If you are using multiple warehouses, the report also lists a product's availability at each warehouse.

If a product's default warehouse does not have sufficient inventory in stock, you can run the report to view a product's availability at other warehouses. If another warehouse has available inventory, you can edit an order to ship a product from a warehouse with sufficient inventory.



Warehouse Availability Analysis — Wednesday, September 11, 2002
Advanced Solutions International, Inc. — Page 1
For the period of 9/10/2002 thru 9/11/2002

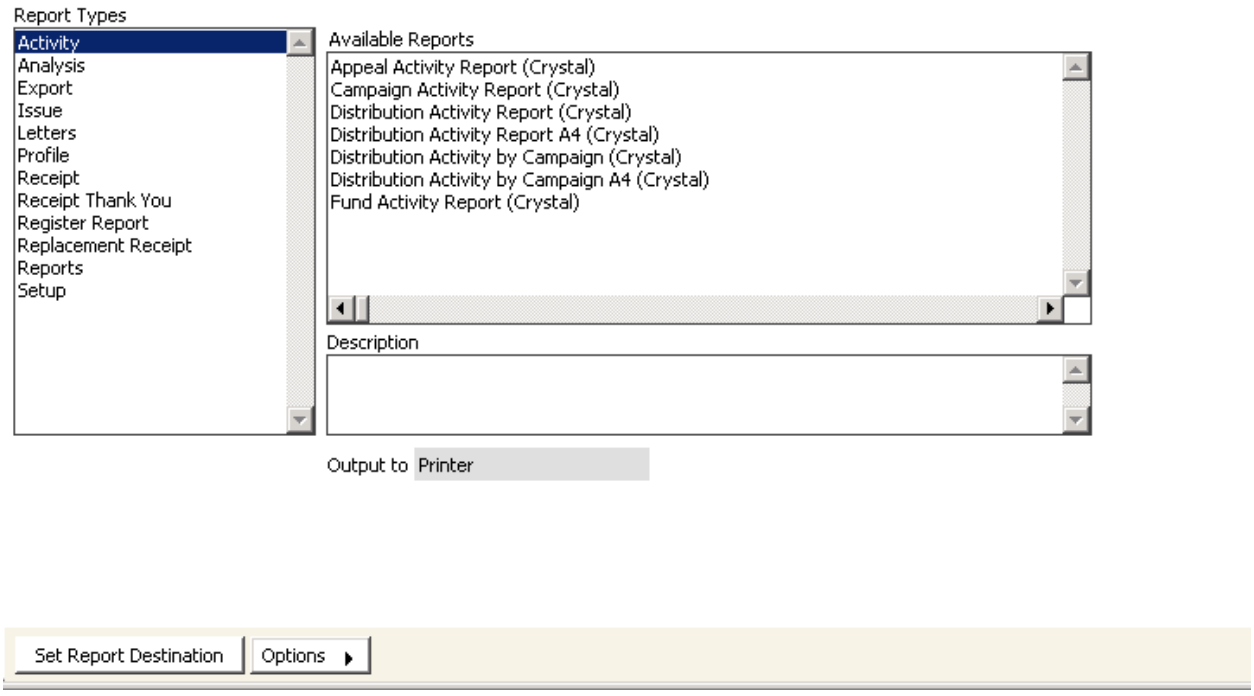
Pay Priority	Order Date	Order Number	Line#	Source	BT_ID	Bill To Customer		Quantity Ordered	Shipped	Backordered	Fillable	Location	Running Available
PUB													
	P53		**WW II Aircraft**									CENTRAL	0
												S	2
													2
0	9/10/2002	354	1	Phone	210	Mrs. Sherry L. Smith		5	2	3	2	CENTRA	0
0	9/11/2002	357	1	Mail	110	Sailing Dreams, Inc.		1	0	1	0	CENTRA	0
0	9/11/2002	358	1	WEB	152	Ms. Marcie L. Farmhave		2	0	2	0	CENTRA	0
							Totals	8	2	6	2		
SOFTWARE													
	SFTWARE-1		**Spreadsheet Creation**									CENTRAL	0
												NORTH	0
												SOUTH	3
													3
0	9/10/2002	356	1	Mail	109	Ms. Janice T. Greer		10	8	2	2	CENTRA	1
0	9/11/2002	359	1	Phone	185	Cook Graphics		10	5	5	0	CENTRA	0
							Totals	20	13	7	2		

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Warehouse Availability Analysis
Desktop: Orders > Generate reports > Product > Warehouse Availability Analysis, click Run, select the date range, and click OK

Fundraising Reports

Fundraising Reports

Fundraising reports window



Admin Console: Continuum > Fundraising reports
Desktop: Fundraising > Generate reports

Report Types

The reports and outputs available through the iMIS Customer Management, Events, and Fundraising modules are generated from information gathered during customer entry, registration entry, gift entry, order entry, and planning processes. The following standard reports are available:

- Activity – Generates a list of activities for individuals.
- Badges – Prints groups of badges using a variety of formats for both continuous-fed and laser printers. (Events only)

- Certificates – Formats and produces continuing education, appreciation, and customer certificates at the event, function, or committee level. (Customer Management and Events)
- Confirmations – Prints confirmation letters or postcards for event registrations. Each printing run consists of the new registrants entered since the last printing run. (Events only)
- Export – Exports a variety of field and file data.
- Hotel – Prints hotel booking/availability, rosters, and transfer information. (Events only)
- Invoices – Prints invoices for event registrations and orders. (Events and Orders only)
- Issue – Prints reminders for donors who have made pledges or who have committed to new gifts on a certain date. (Fundraising only)
- Labels – Prints groups of labels using a variety of sizes and layouts. (Customer Management and Events)
- Letters – Selects letter formats for printing mass mailings for event registrations and other customer activities. (Customer Management, Events, and Fundraising)
- Meetings – Generates event reports from a group of indexes that list the events and related functions. (Events only)
- Order Status – Generates a variety of detailed summary reports on open orders.
- Planning – Generates room setup and general planning reports. (Events only)
- Product – Prints product and product inventory reports.
- Product Transactions – Generates reports on both posted and unposted product inventory transactions.
- Profiles – Prints customer profile information.
- Receipt – Prints receipts. (Fundraising only)
- Receipt Thank You – Prints thank you letters. (Fundraising only)

- Register Report – Prints detailed and summarized reports of receipts printed. (Fundraising only)
- Replacement Receipt – Prints replacement receipts. (Fundraising only)
- Reports – Prints detailed and summarized reports and analyses. (Fundraising only)
- Rosters – Generates a variety of detailed rosters that list registrants or committee members for events or functions.
- Statistics – Generates statistical analysis of data including event registrations and customer participation. (Customer Management only)
- Status – Prints summary reports that recap registration and cancellation counts and fees. (Events only)
- Tickets – Prints personalized tickets for functions. Each printing consists of new registrants entered since the last printing run. (Events only)
- Transaction Lists – Generates accounting audit trail details and recaps reports that list activities based on the transactions generated through AR/Cash, Billing, and Events.

Generating Letters from the Fundraising Overview Tab

To streamline fundraising processes, you can generate thank-you letters directly from the Overview tab of Fundraising, while the donor's record is open.

To generate a Fundraising letter

To generate a letter, the donor record opened must display a valid gift transaction. To access this feature, you must have Word Integration installed on the iMIS system.

1. From Fundraising > Enter and edit gifts, open the gift record for the contact for whom you are generating a letter.

   Note: To generate a letter, the record opened must display a valid gift transaction.

2. Click Letter at the bottom. The Fundraising Standard Letters window opens.
3. Choose the letter you want you use from the Fundraising Standard Letters window.

Note: If you are creating a new letter or editing an existing letter, see To create a new letter or To edit an existing letter.

4. Click Merge.
5. Choose one or both of the following options: Create Activity Records with Merge and/or Create EMAIL Activities Records with Merge.
6. Click Continue.
7. A dialog box prompts: The System has X Activities to insert. Do you wish to write these activities? Click Yes or No. Microsoft Word opens and displays the Template.
8. To create the merged output, select Merge to New Document from the Word toolbar.
9. To print the letter, select File > Print.
10. Select File > Save As to save the letter to a folder on your computer.

To create a new letter

1. Click New. The New Standard Letter window opens.
2. Complete the Report Title and Report File fields.
3. Click OK. Microsoft Word opens.
4. Create the letter by selecting merge fields and entering text.
5. When you finish, click the Save icon or select File> Save.
6. To save the letter to another location outside of iMIS, select File> Save As and save a copy in another location.
7. Close Microsoft Word.

To edit an existing letter

1. Select the title of the letter you wish to edit and click OK.
2. Once the letter opens in Microsoft Word, edit it.
3. When you finish, select File> Save.

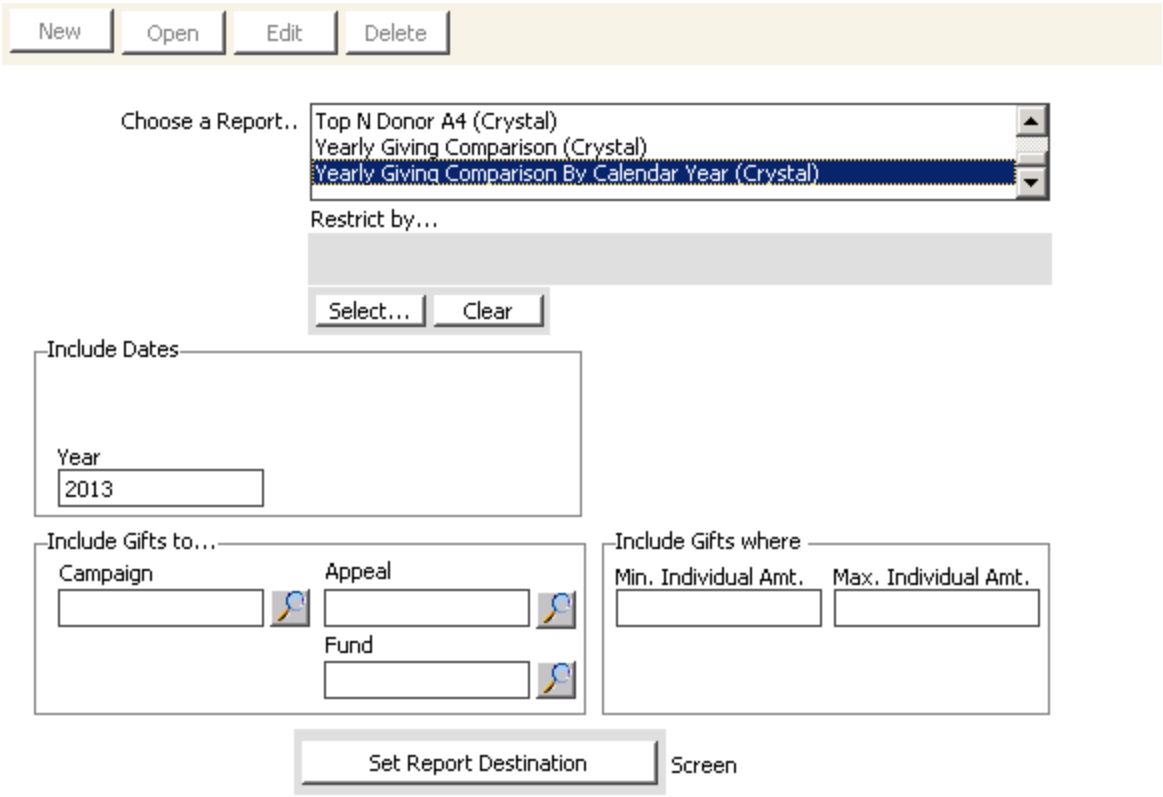
4. If you also want to save the letter to another location outside of iMIS, you can select File> Save As and save a copy in another location.
5. Close Microsoft Word.

Executive Reports in Fundraising

The Generate executive reports window is an abbreviated version of the Fundraising Generate reports window. The Generate executive reports window allows you to generate several of the detail and summary reports that are available in the Fundraising Generate reports window. The Generate executive reports window is just that – a window designed to allow the fundraising executive to view or print detail or summary reports of gifts, pledges, and donor clubs, and to view or print comparisons between current and previous time periods – all without having to go to the Generate reports window.

The Generate executive reports window has some limitations. You cannot rename reports in the Generate executive reports window, nor can you export, issue, or run letters reports as you can in the Generate reports window.

Executive reports window



Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate executive reports

Choose a Report

This area contains a scrolling list of all reports available from the Generate executive reports window. For each available report displayed in this area, you can select either a detail or summary report by enabling either the Detail or Summary option.

- Pledge – Select this report to generate either a detail or summary report of all pledges entered. Subtotal the report by sorting on any of the options in the Sort & Summarize by area of the window except Donor Club and Meeting. The report lists the amounts pledged and paid as well as balances remaining. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date.

- Giving – Select this report to generate either a detail or summary report of all gifts and pledge/installment payments. Subtotal the report by sorting on any of the options in the Sort & Summarize by area of the window except Donor Club and Meeting. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date.
- Prev/Curr Period – Select this report to generate a detail or summary list of gifts given per user-selected sort, comparing these amounts between two defined time periods. These reports show the difference in amounts and the percentage of change, with single gifts and pledges broken down by fund. To run the Prev/Curr Period report, you must enter values in the Comparison to Previous Period From and Thru date fields.
- Donor Club – The Donor Club Detail (lndscape) report allows you to generate a list of all individuals who have attained a donor club, subtotaled by individual donor clubs with a total of all donor clubs achieved. The report displays the date the donor club was achieved and the Solicitor, Donor, List As, Fund, Campaign, and Appeal associated with each donor club. Subtotal the report by sorting on any of the options in the Sort and Summarize by area except Meeting and Donor Club. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date. The solicitor is determined by the solicitor specified in the Solicitor field on the Donor Data tab on the Manage customers window (from Customers, select Manage customers, open a customer record, and select the Donor Data tab) rather than the solicitor specified in the Solicitor field on the Enter and edit gifts window (from Fundraising, select Enter and edit gifts).
- The Donor Club Summary report lists only the fund, campaign, and appeal codes for each specified donor club. The solicitor is determined by the solicitor specified in the Solicitor field on the Donor Data tab on the Manage customers window rather than the solicitor specified in the Solicitor field on the Enter and edit gifts window. Selecting the Summary option allows you to generate a list of all donor clubs achieved. Subtotal the report by sorting on any of the options in the Sort & Summarize by area of the window except Meeting and Donor Club. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date.

Sort & Summarize by

Select from the following options to sort and summarize your report:

- Date – Subtotal your report by sorting by date or date range. The date cannot be selected for Prev/Curr Period reports.
- Fund – Subtotal your report by sorting on Fund. This sorting option is available for all applicable reports.
- Campaign – Subtotal your report by sorting on Campaign. This sorting option is available for all applicable reports.
- Appeal – Subtotal your report by sorting on Appeal. This sorting option is available for all applicable reports.
- Member Number – Subtotal your report by sorting on the donor's customer ID. This sorting option is available for all applicable reports.
- Solicitor – Subtotal your report by sorting on solicitor. This sorting option is available for all applicable reports. In all reports except for the Donor Club reports, the solicitor entered in the Solicitor field on the Enter and edit gifts window restricts each report. The Donor Club reports search on the solicitor entered in the Solicitor field on the Donor Data tab on the Manage customers window.
- Donor Club – Subtotal your report by sorting on donor club. This sorting option works only for Donor Club Detail and Donor Club Summary reports.
- Meeting – Subtotals report by sorting on events. This sorting option is available only for Donor Club reports.

Restrict by

There are several options in this area of the window for restricting report output.

Member – Enter the customer ID for the report, or click the lookup icon to select an ID.

Select – (optional) Lets you open the Member/Contact Selections window to select customer type options for setting your report parameters. All is the default. You can select from one of the following options:

- All (all customer types)
- Members
- Non Members
- Specific Types
- All (all company and individual customers)
- Company Only
- Individual Only

Note: If you select the Specific Types field, a blank field displays where you can enter one or more customer types (to enter multiple customer types, enter a comma (but no space) between customer types).

Clear – Lets you clear the values entered on the Member/Contact Selections window.

Solicitor

(optional) Enter the customer ID of the solicitor associated with the report, or click the lookup icon to select an ID.

Gifts To

Enter an Appeal, Campaign, and Fund for your report in these fields. You can click the lookup icon to select an appeal, campaign, or fund code. For all reports except Donor Club reports, the Appeal, Campaign, and Fund are determined by the information that was entered in the Appeal, Campaign, and Fund fields on the Enter and edit gifts window (from Fundraising, select Enter and edit gifts).

Date

Enter the beginning date for the reporting period. The system searches on the actual transaction date for all reports except for Prev/Curr Period reports.

Thru

Enter the report ending date.

Comparison to Previous Period

The following fields and options are used in conjunction with the Prev/Curr Period reports:

- From – Enter the beginning date of the previous comparison period.
- Thru – Enter the ending date of the previous comparison period.
- All – Enable to print all records for the specified time period. This is the default value.
- Lapsed – Enable to print a record with subtotals that have previous amounts and zero current period amounts.
- Decreased by – Enable to print records with a specified subtotal where the percentage change is equal to (=) or less than (<) the percentage specified in the Percent field.
- New – Enable to print only records with subtotals in the current period and zero amounts in previous time periods.
- Increased by – Enable to print only records with a specified subtotal where the percentage change is equal to (=) or greater than (>) the percentage specified in the Percent field.
- Percent – Enter the percentage for a Decreased by or Increased by comparison.

Detail

Enable to specify a detail report.

Summary

Enable to specify a summary report.

Set Report Destination

Opens the Set report destination window to set the report output destination. The initial default output device is Printer. You can change the default output device and save this setting (select File> Report Destination, select the desired default output device, and click Save) so that the desired default output device is selected each time you start iMIS.

Note: Set the report destination to Screen to avoid the unnecessary printing of reports.

Note: To print the report, from the Report Destination window select the Printer option rather than printing the report from the screen. The printed reports will not align exactly as they appear on the screen if you print them from the screen; printing from the Printer option will prevent this problem.

To generate reports in the Generate executive reports window

1. From Executive reports, click New.
2. From Choose a Report, select a report.
3. Select the search options for the report. The options available vary based on the report selected.
4. Click Run.

To upgrade a cloned Fundraising Profile Crystal report

If you cloned a Fundraising Profile Crystal report for use in a previous iMIS release, make sure you add the date range parameters to the cloned report description, or the report will not print from the Fundraising History window or any location in iMIS. (The standard Fundraising Profile Crystal report specification file is updated automatically when you upgrade to iMIS 10.5. You need to manually update this type of report specification file only if you created a clone and saved it with a customized name or location.)

To add date range parameters manually to a cloned Fundraising Profile Crystal report specification file, use the following steps.

1. Select Utilities > Report Specs.
2. In the Report Specifications window, select the cloned Fundraising Profile Crystal report from the list, then click Parameters.

3. In the Detail Report Parameters window, click Edit, then click Crystal Params.
4. In the Crystal Parameters window, add the new parameters:

- BeginDate

  Select Insert. In Parameter Name, enter BeginDate. In Variable Name (or String), enter RV.BeginDate.

- EndDate

  Select Insert. In Parameter Name, enter EndDate. In Variable Name (or String), enter RV.EndDate.

5. Click OK in the Crystal Parameters window.
6. Click Save in the Detail Report Parameters window.
7. Close the Detail Report Parameters and the Report Specifications windows.

Fundraising Receipts

Receipt Reports

The Fundraising module offers several receipting reports. All of these reports are Crystal reports, which can be customized.

Receipt (Conforms to the Canadian tax publication IT-110R3 Interpretation Bulletin for Gifts and Official Donation Receipts)	Sample Auto Receipt	Generates a receipt that includes the following fields: Registration Number, Receipt Number, Issued Date, Amount, and Original Receipt Number
Receipt Thank You	Sample Thank You	Sample receipting thank you letter that includes receipt amount and breakdown of gifts received
Register Report	Sample Register Report 1	Sample register report that includes a detail report of receipts printed

Register Report	Sample Register Report 2	Sample register report that includes a summary of receipts printed
Replacement Receipt (Conforms to the Canadian tax publication IT-110R3 Interpretation Bulletin for Gifts and Official Donation Receipts)	Duplicate Receipt	Generates a duplicate receipt that includes the following fields: Registration Number, Receipt Number, Issued Date, Amount, and Original Receipt Number

Assigning Receipting Intervals to Customer Records

One of the benefits of the Fundraising receipting function is the ability to assign receipting intervals to donors. For example, if you set the receipting interval to annual, the donor receives one receipt per year.

Other donors may have a monthly donation schedule and receive a receipt every 30 days. By enabling a receipting interval option, the donor's receipts are filtered out from the rest of the auto-generated receipts until the desired receipting interval has passed.

The Last Receipt Date field on the Donor Data tab of the Manage customers window is updated when a receipt is issued. The last date that a receipt was printed for the donor is displayed on the Donor Data tab.

Receipts are printed when the interval preference is greater than or equal to the difference between the current receipts issued date (system date) and the donor's Last Receipt Date. For example, a donor's receipt interval is set to Monthly and the donor makes a new gift (with payment) within 30 days after their last receipt was printed. If an auto-receipt run is initiated on the 31st day after the last receipt was printed, a receipt prints for the gift. However, a receipt does not print if a receipt run is initiated within 30 days after the donor's last receipt was printed.

Receipting intervals for customers are selected in the customer's Donor Data tab on the Manage customers window. See Adding Fundraising Information to a Customer Record.

Generating Receipts

Gift receipts are not generated until you run the auto-receipting batch query report. You can also generate receipts if batch control is not enabled. You cannot edit a gift after a receipt has been issued for the gift because an accounting record has been generated. With the Fundraising module, you can print receipts, thank you letters, and register reports in one linear process or you can print each separately.

Note: If you use multiple entities, batch control should be enabled.

Printing receipts uses the same batch logic that is used in AR/Cash and Billing. A batch is used to select and group receipts. It also can be used as part of the selection criteria for other receipting reports. You can select an AR/Cash batch that has been used to record payments, or you can use a receipt batch created for receipting purposes only.

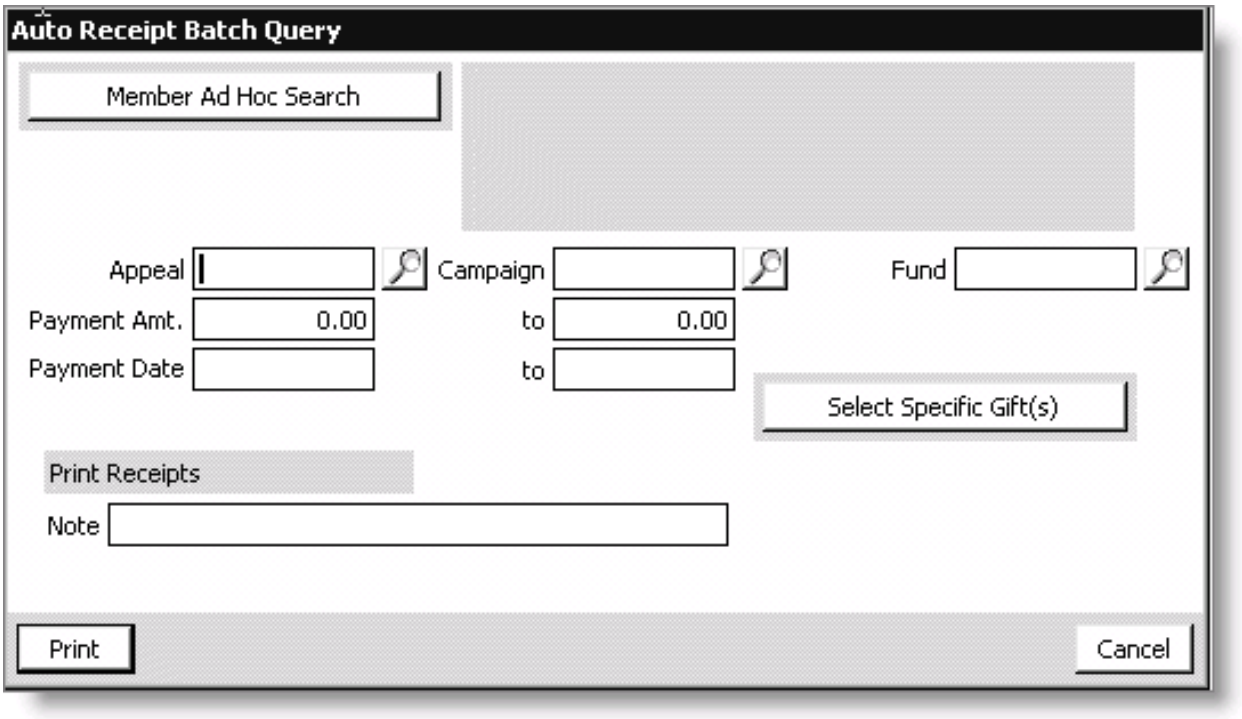
Note: If you use a mixed batch (one that contains receipts and payments) and post the batch, you cannot open the batch to print thank you letters or register reports unless you change the batch's status to open. However, you can enter the closed batch name or number as selection criteria for thank you letters, register reports, or replacement receipts.

Auto Receipt Selection Criteria

You can select from several methods for printing receipts:

- Set a Receipting Interval at the donor level.
- Use selection criteria from the Auto Receipt Batch Query window.
- Conduct an ad hoc search from the Select Search Instructions window.
- Use selection criteria from the Select Specific Gift(s) window.
- You can generate receipts from the Auto Receipt Batch Query window.

Auto Receipt Batch Query window



Admin Console: Continuum > Fundraising reports > Receipt > Sample Auto Receipt (Crystal)
Desktop: Fundraising > Generate reports > Receipt from the Report Types list > Sample Auto Receipt (Crystal)

Member Ad Hoc Search

(optional) Enables you to display the Select Search Instructions window for options to conduct an ad hoc search.

Appeal

(optional) Enter the appeal to be included in the search criteria for the auto receipt report.

Campaign

(optional) Enter the campaign to be included in the search criteria for the auto receipt report.

Fund

(optional) Enter the fund to be included in the search criteria for the auto receipt report.

Payment Amt

(optional) Enter the minimum payment amount for the payment amount range criteria for issuing the receipts.

to

(optional) Enter the maximum payment amount for the payment amount range criteria for issuing the receipts.

Payment Date

(optional) Enter the beginning payment date range criteria for issuing the receipts.

to

(optional) Enter the ending payment date range criteria for issuing the receipts.

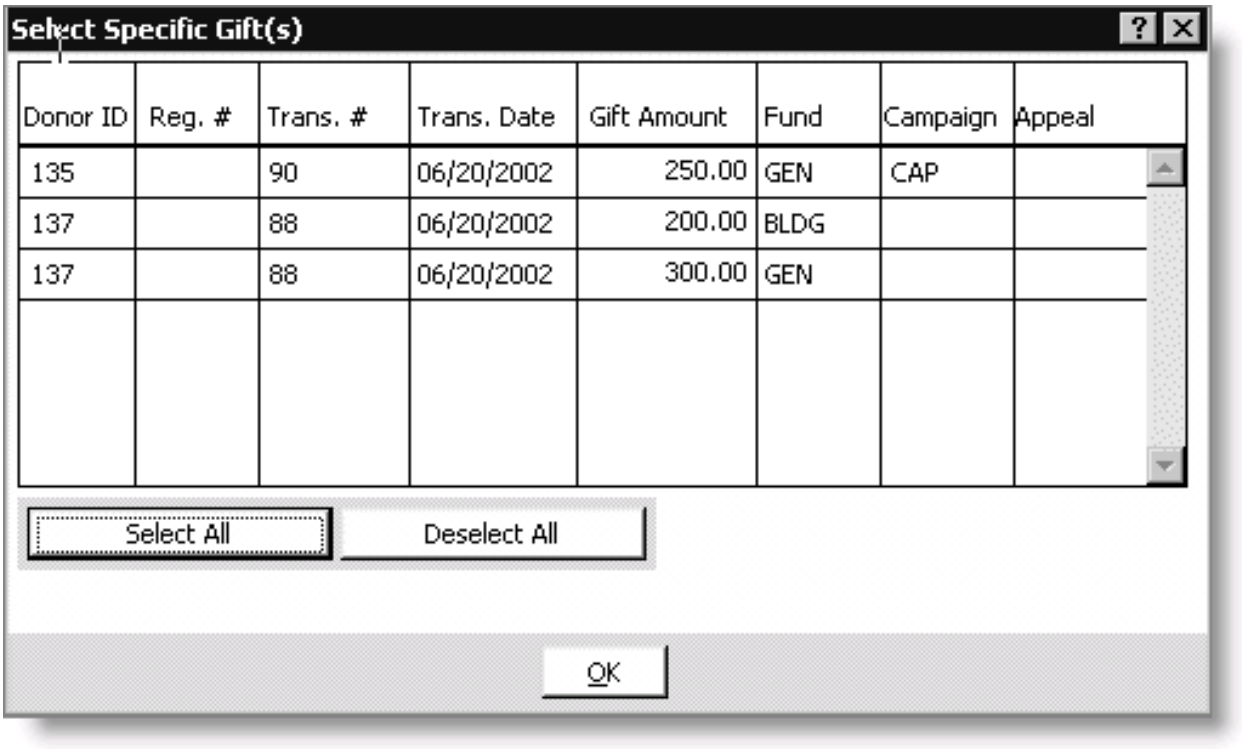
Select Specific Gift(s)

(required) Enables you to display the Select Specific Gift(s) window to select from a list of gifts. You cannot print receipts unless you click this button and select at least one gift in the Select Specific Gift(s) window.

Note

Enter additional information to be printed on the receipt.

Select Specific Gift(s) window



Use the Select Specific Gift(s) window to select specific gifts for donation receipts after the search criteria have been entered on the Auto Receipt Batch Query window. You may also use the Select Specific Gift(s) window as the sole selection of gifts for donation receipts.

Donor ID

Displays the customer ID number of the donor associated with the gift.

Reg #

Displays the registration number of the fund or organization associated with the gift.

Trans #

Displays the transaction number associated with the gift.

Trans Date

Displays the date of the transaction associated with the gift.

Gift Amount

Displays the amount of the gift.

Fund

Displays the fund associated with the gift.

Campaign

Displays the campaign associated with the gift.

Appeal

Displays the appeal associated with the gift.

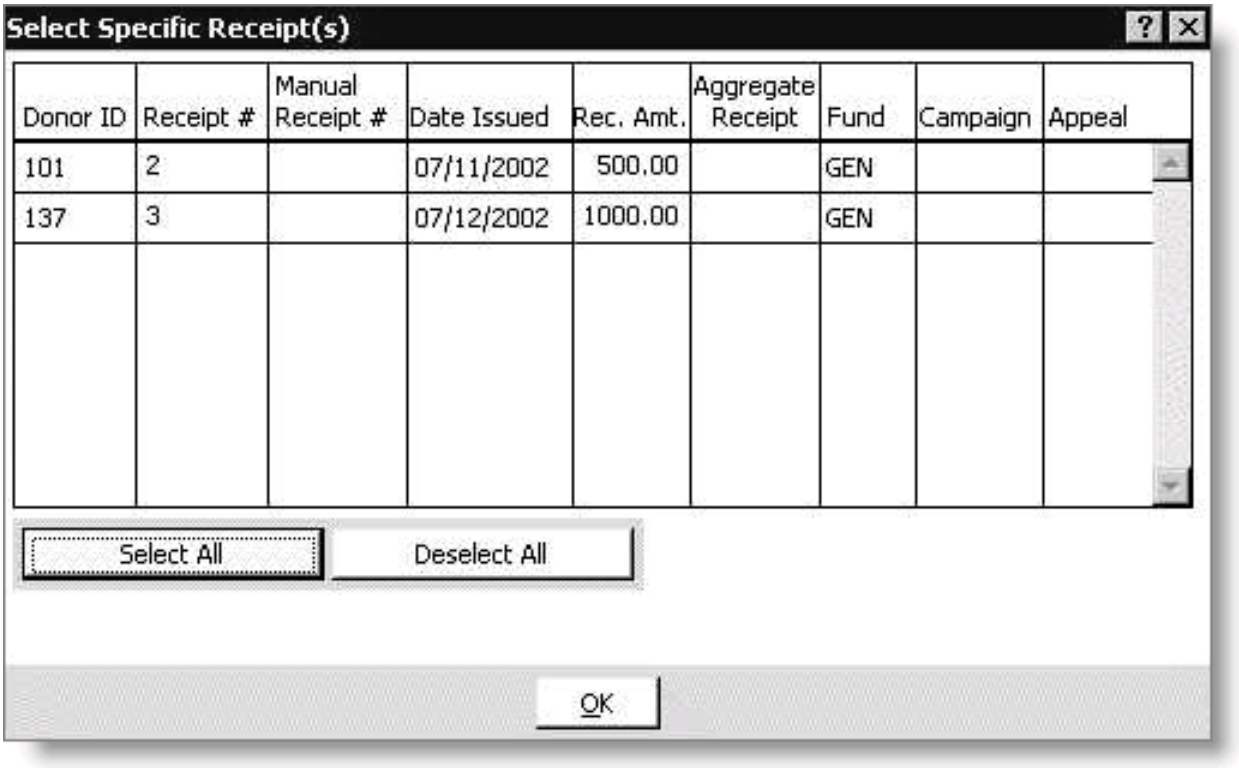
Select All

Enables you to select all the gifts in the window.

Deselect All

Enables you to deselect all selected gifts in the window.

Select Specific Receipt(s) window



Admin Console: Continuum > Fundraising Reports > Receipt Thank You > Sample Thank You (Crystal)
Desktop: Generate reports > Receipt Thank You from the Report Types list > Sample Thank You (Crystal)

Use the Select Specific Receipts(s) window to select specific receipts for thank you receipts after the search criteria have been entered on the Auto Receipt Batch Query window. You may also use the Select Specific Receipts(s) window as the sole selection of receipts for thank you receipts.

Donor ID

Displays the customer ID number of the donor associated with the receipt.

Receipt #

Displays the automatically generated receipt number.

Manual Receipt #

Displays the manual receipt number.

Date Issued

Displays the date the receipt was issued.

Rec Amt

Displays the receipt amount.

Aggregate Receipt

Displays Yes if the receipt is an aggregate receipt.

Fund

Displays the fund associated with the receipt.

Campaign

Displays the campaign associated with the receipt.

Appeal

Displays the appeal associated with the receipt.

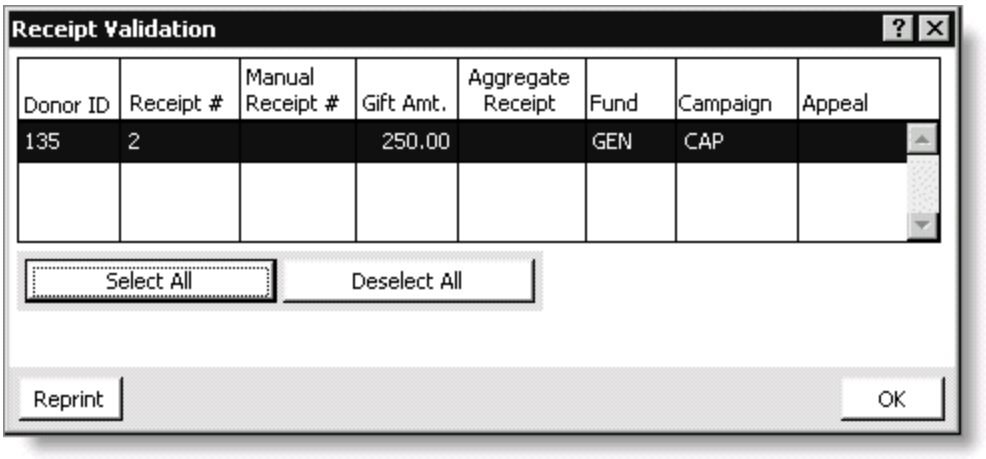
Select All

Enables you to select all the gifts in the window.

Deselect All

Enables you to deselect all selected gifts in the window.

Receipt Validation window



Admin Console: Continuum > Fundraising Reports > Receipt > Sample Auto Receipt (Crystal)
Desktop: Fundraising > Generate reports > Receipt > Sample Auto Receipt (Crystal)

After you print receipts, you can either validate or reprint the receipts. All receipt numbers in the current batch that have been printed are listed in the Receipt Validation window.

Donor ID

Lists donors by ID number.

Receipt #

Lists receipt numbers for recently printed receipts.

Manual Receipt #

Lists manual receipt numbers for recently issued receipts.

Gift Amt

Lists gift amounts for the recently issued receipts.

Aggregate Receipt

Displays Yes if the receipt is an aggregate receipt.

Fund

Displays the fund associated with the printed receipt(s).

Campaign

Displays the campaign associated with the printed receipt(s).

Appeal

Displays the appeal associated with the printed receipt(s).

Select All

Enables you to select all the receipts in the window.

Deselect All

Enables you to deselect all the receipts in the window.

Reprint

Enables you to reprint all selected receipts in the window.

Note: When you click the OK button, you are prompted to print a thank you letter report and a register report. Before you click OK, verify that the receipts printed correctly. After you click OK, the receipts cannot be reprinted. However, the original receipts can be canceled and you can issue replacement receipts with new receipt numbers.

To generate auto receipts

When issuing receipts, you are prompted to issue thank you letters and register reports during the process. You can issue these additional reports at this time or to postpone printing them.

1. From Fundraising, select Generate reports to display the Generate reports window.

2. Select Receipt from the list of Report Types.
3. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Auto Receipt Batch Query window opens.
6. Enter the search parameters for finding the receipts.
7. Click Select Specific Gift(s). The Select Specific Gift(s) window opens.

- If you did not enter specific search criteria in the Auto Receipt Batch Query window and only clicked Select Specific Receipt(s), a confirmation message is shown before the list of receipts is built. Click Yes to proceed.

  The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a thank you receipt was printed or not.

8. Select the gifts for which to generate receipts, or click Select All to select all of the gifts.
9. Click OK to return to the Auto Batch Receipt Query window.
10. (optional) Add a note of up to 30 characters in the Note field. This information is printed on all receipts generated in this batch.
11. Click Print.
12. Click OK to print the receipts.
13. (optional) To reprint the receipt, click Reprint.
14. Click OK after you have checked the receipts and verified that they have printed correctly. A message asks if you want to print the thank you letter now.

    To print the thank you letter:

- Click Yes.
- Click OK.

- The Fundraising Reports window opens.
- Select the Sample Thank You (Crystal) report.
- Click OK.

  A message asks if you want to print the Register Report.

15. To print the Register Report, click Yes.
16. Click OK. The Fundraising Reports window opens.
17. Select the Register Report to print and click OK.

    To print a thank you letter after auto receipting

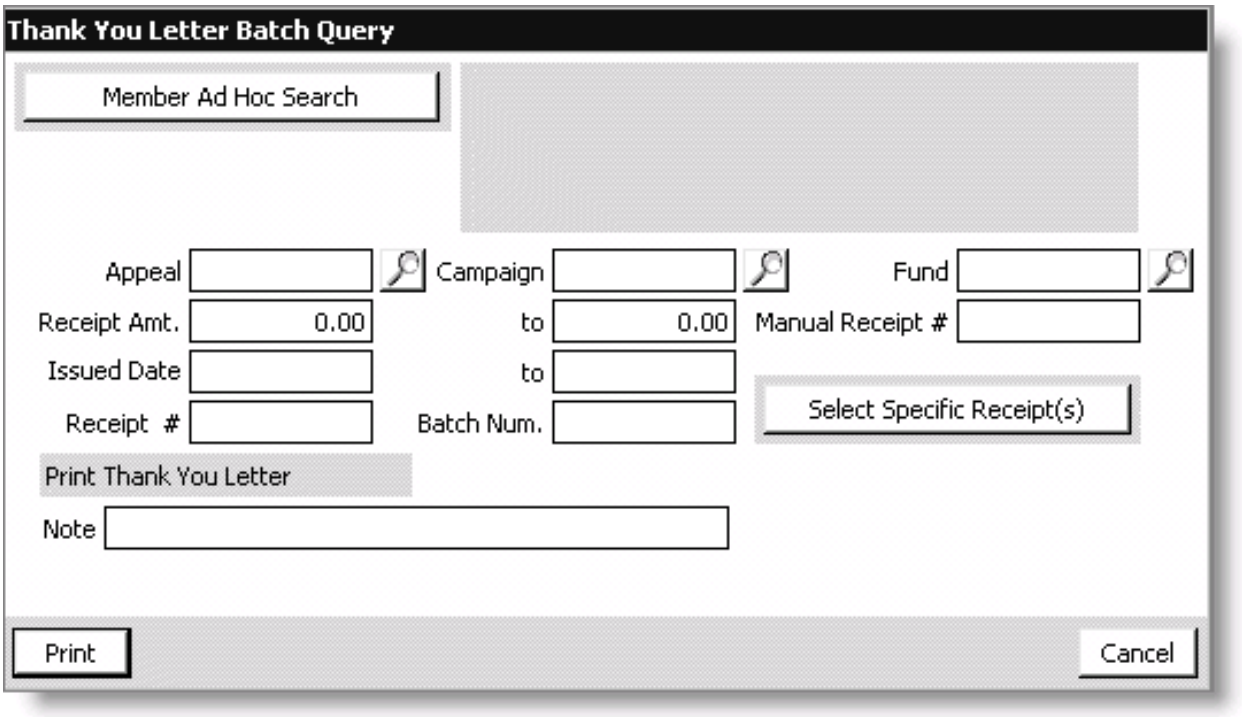
1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt Thank You from the list of Report Types.
3. Select Sample Thank You (Crystal) from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Thank You Letter Batch Query window opens.
6. Enter the search parameters.
7. Click Select Specific Receipt(s).

   - If you did not enter specific search criteria in the Thank You Letter Batch Query window and only clicked Select Specific Receipt(s), a confirmation message is displayed before the list of receipts is built. Click Yes to proceed. The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a thank you receipt was printed or not.

8. Select the receipts to be generated, or click Select All to select all of the receipts.
9. Click OK to return to the Thank You Letter Batch Query window.
10. (optional) Add a note of up to 30 characters in the Note field. This information displays on

all receipts generated in this batch.

11. Click Print to generate the report and close the Thank You Letter Batch Query window.



Thank You Letter Batch Query window

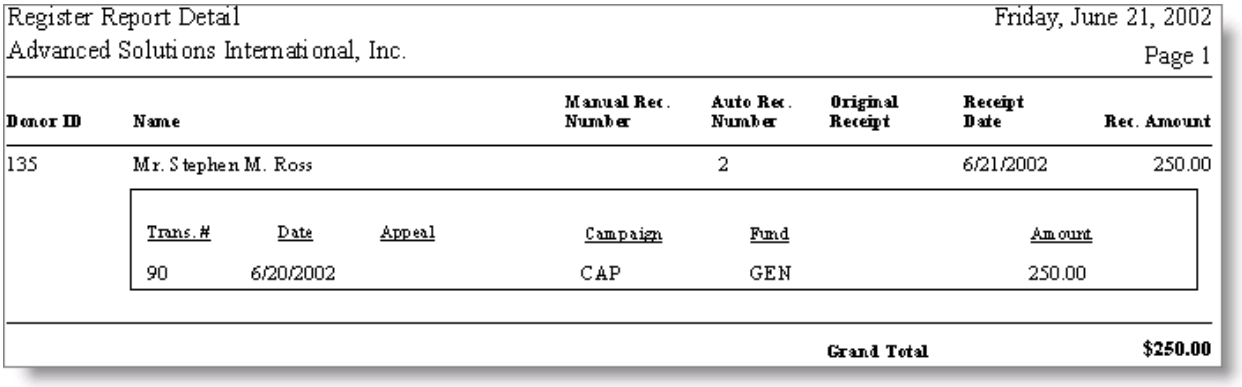
To print a Register Report after auto receipting

1. From Fundraising, select Generate reports to open the Generate reports window.
2. Select Register Report from the list of Report Types.
3. Select one of the register reports from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Batch Receipt Query window opens.
6. Enter the search parameters.
7. Click Select Specific Receipt(s).

- If you did not enter specific search criteria in the Batch Receipt Query window and only selected Select Specific Receipt(s), a confirmation message displays before the list of

receipts is built. Click Yes to proceed. The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a register report was printed or not.

8. Select the receipts to be generated, or click Select All to select all of the receipts.
9. Click OK to return to the Batch Receipt Query window.
10. (optional) Add a note of up to 30 characters in the Note field. This information displays on all receipts generated in this batch.
11. Click Print to generate the report and close the Batch Receipt Query window.



Register Report Detail — Friday, June 21, 2002
Advanced Solutions International, Inc. — Page 1

Donor ID	Name	Manual Rec. Number	Auto Rec. Number	Original Receipt	Receipt Date	Rec. Amount
135	Mr. Stephen M. Ross		2		6/21/2002	250.00

Trans.#	Date	Appeal	Campaign	Fund	Amount
90	6/20/2002		CAP	GEN	250.00

Grand Total $250.00

Sample Register Report

Generating Receipts Using Special Search Criteria

You can conduct specific searches using a wide range of options when generating donation receipts and receipt reports. For example, you can narrow your search to a specific appeal, campaign, or fund, or you can specify a date or amount range. In addition, you can conduct ad hoc searches on the Name table, the Name_FR table, or both.

To generate receipts using a date and amount range

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt from the list of Report Types.
3. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
4. Click Run. The Auto Receipt Batch Query window opens.

5. Enter the Campaign.
6. Enter the Fund.
7. Enter an amount range in the Payment Amt and to fields.
8. Enter a date range in the Payment Date and to fields.
9. Click Select Specific Gift(s) and select records for which receipts will be issued.
10. Click OK to return to the Auto Receipt Batch Query window.
11. Click Print to run the report.

To generate receipts using an ad hoc search

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt from the list of Report Types.
3. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
4. Click Run. The Auto Receipt Batch Query window opens.
5. Click Member Ad Hoc Search. The Select Search Instructions window opens.
6. Click New. The Search Instructions window opens.
7. Enter the name of the search in the Search Name field.
8. Select a Mode.
9. Select a Comparison File from the drop-down list.
10. Select a Comparison Field from the drop-down list.
11. Select a comparison operator from the list of comparison options.
12. Enter the desired value in the Comparison Value data entry area.
13. Click Save to save the search instructions and return to the Select Search Instructions window.

14. Click OK to return to the Auto Receipt Batch Query window. The search parameters display to the right of the Member Ad Hoc Search button.
15. Click Select Specific Gift(s). The Select Specific Gift(s) window opens.
16. Select the receipt to be generated, or click Select All to select all of the receipts.
17. Click OK.
18. Click Print to generate the report.

Generating Replacement Receipts

You can generate replacement receipts with the receipting function. Replacement receipts are issued to replace previously issued receipts. To provide an audit trail, the original receipt number is canceled and a new replacement receipt number is issued. Only receipts that have not been canceled can be selected to print replacements. When the receipt is selected, the original receipt number is canceled and the next available auto-generated receipt number is assigned.

Note: When printing replacement receipts, if you do not enter information in the Note field on the Replacement Receipt Batch Query window, the receipt prints the note from the original receipt. For example, if the original note was January 99 receipts and a replacement receipt is issued in July, the note on the receipt will still read January 99 receipts if you do not enter a new note in the Note field. If a new entry is made in the Note field, this entry overrides the original note text.

To generate replacement receipts

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Replacement Receipt from the list of Report Types.
3. Select Sample Replacement Receipt (Crystal) from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Replacement Receipt Batch Query window opens. This window is similar to the Auto Receipt Batch Query window in that it also allows you to specify search

criteria to generate receipts.

6. (optional) Enter the search criteria.
7. Click Select Specific Receipt(s) to display the Select Specific Receipts window.

- If you did not enter selection criteria on the Replacement Receipt Batch Query window and only clicked Select Specific Receipt(s), a confirmation message displays before the list of receipts is built. Click Yes to proceed. The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a register report was printed or not.

8. Select the receipts for which to generate replacements, or click Select All to select all of the receipts.
9. Click OK to return to the Replacement Receipt Batch Query window.
10. Click Print to generate the replacement receipts. You are prompted to change the printer settings if necessary.

- To change the printer selection, select the destination from File> Report Destination.

11. Click OK.

- A message is printed on the receipt indicating that it is a replacement receipt. The original receipt number is also printed on the receipt. The Receipt Validation window opens after the receipt prints.

12. Click OK. A message displays asking if you want to print a thank you letter for this receipt.
13. Click Yes to print the letter, or No to skip printing the letter. After you print the thank you letter or click No, a second message displays asking if you want to print a register report for this receipt.
14. Click Yes to print the register report, or No to skip printing the register report.

Generating Aggregate Receipts

The receipting feature allows you to generate aggregate receipts. An aggregate receipt can be a single receipt for multiple payments or for one payment split among multiple

funds.

An aggregate receipt prints under the following conditions:

- A donor made multiple payments to one fund (one registration number)
- A donor made one payment distributed to multiple funds that meet the specified selection criteria, but the funds have the same registration number
- A donor made a payment to a fund that does not have a registration number (receipts for payments to funds without registration numbers are aggregate receipts by default)

To generate an aggregate receipt

1. From Fundraising, select Enter and edit gifts to display the Overview tab on the Enter and edit gifts window.
2. Enter a gift. See To enter a single gift or single pledge for information on entering a single gift.
3. Click New and enter a second gift using the same donor ID, but to a different fund, and click Save.
4. From Fundraising, select Generate reports to display the Generate reports window.
5. Select Receipt from the list of Report Types.
6. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
7. Click Run to display the Auto Receipt Batch Query window.
8. Click Select Specific Gift(s) to display the Select Specific Gifts window. Select the two gifts you just entered.
9. Click OK to return to the Auto Receipt Batch Query window.
10. Click Print.
11. Click OK when the system prompts you to change printers.

- In this example, a single receipt was issued for both gifts. The gift amount of $500 displays in the Gift Amt. field in the Receipt Validation window. This is the total of the two

gifts. Yes displays in the Receipt Validation window to indicate that this is an aggregate receipt. Because this is an aggregate receipt, only one receipt number displays.

12. Click OK. A message displays asking if you want to print a thank you letter for this receipt.
13. Click Yes to print the letter, or No to skip printing the letter. After you print the thank you letter or click No, a second message displays asking if you want to print a register report for this receipt.
14. Click Yes to print the register report, or No to skip printing the register report.

Manual Receipting

Although the Fundraising module provides a robust auto-receipting feature, you can use the user-generated manual receipting function when necessary. Because manual receipting and auto receipting are mutually exclusive, if you enter a manual receipt for a gift, a receipt is not auto-generated for the gift. Manual receipts are never printed; they are stored with the gift. Manual receipt numbers cannot be entered for single pledges or installment pledges. If you select a Gift Type of Single Pledge or Installment, the Receipt Number field and the Do not Print Receipt option are disabled on the Enter and edit gifts window.

To issue manual receipts

1. From Fundraising, select Enter and edit gifts to display the Overview tab on the Enter and edit gifts window.
2. Enter a gift.
3. Enter a manual receipt number in the Receipt Number field.
4. Click Save.

Note: When you enter a receipt number, the Do not Print Receipt option is automatically selected and cannot be cleared. You cannot edit a gift associated with a manual receipt after the gift has been saved.

Sample Fundraising Reports

Fundraising reports are used to generate detail and summary reports on many aspects of fundraising.

Donor Club Summary as of July 23rd, 2002

Page 1

Sorted by Date

Advanced Solutions International, Inc.

Date	Donor Clubs Awarded	Donor Clubs	Donor Club Title
08/29/2000	1	BRICK	Brick Donor Club
07/15/2002	2	AMBASSADOR	Ambassador Donor Club
Total Donor Clubs Awarded	3	Awards listed	

Admin Console: Continuum > Fundraising reports > Reports, select report from Available Reports

Desktop: Fundraising > Generate reports > Reports, select a report from the Available Reports

Appeal Activity Report (Crystal)

The Appeal Activity Report is a detailed listing of all of the Donation (Gifts and Pledges) Activities, listed by Appeal for a given period of time. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity

Desktop: Fundraising > Generate Reports > Activity

Notes

- Donations include Gifts and Pledges, including unpaid pledges.
- The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.
- In this report, Donations include Fundraising, Events, and Dues donations.

- Split donations will be displayed on two or more shaded lines.
- If the donor is a company, company name is displayed. If the donor is a person, Full Name is displayed.

Appeal Activity Report

Donor Id	Donor Name	Member Type	Donation Date	Campaign	Fund	Type	Net Donation	Payments	Balance
000021									
10145	Bill Bretschneider	D	10/29/2003	AC03	AF	G	2,500.00	5,000.00	-2,500.00
10108	Al Ferrari	D	10/29/2003	AC03	AF	G	5,500.00	11,000.00	-5,500.00
10087	Bill Edwards	D	10/29/2003	AC03	AF	G	9,000.00	18,000.00	-9,000.00
							17,000.00	**34,000.00**	**-17,000.00**

Appeal Activity Report

101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	AC01	AF	G	200.00	800.00	-600.00
101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	AC01	CAP	G	300.00	1,200.00	-900.00

Split donations are shown on consecutive shaded lines

Appeal Performance Analysis (Crystal)

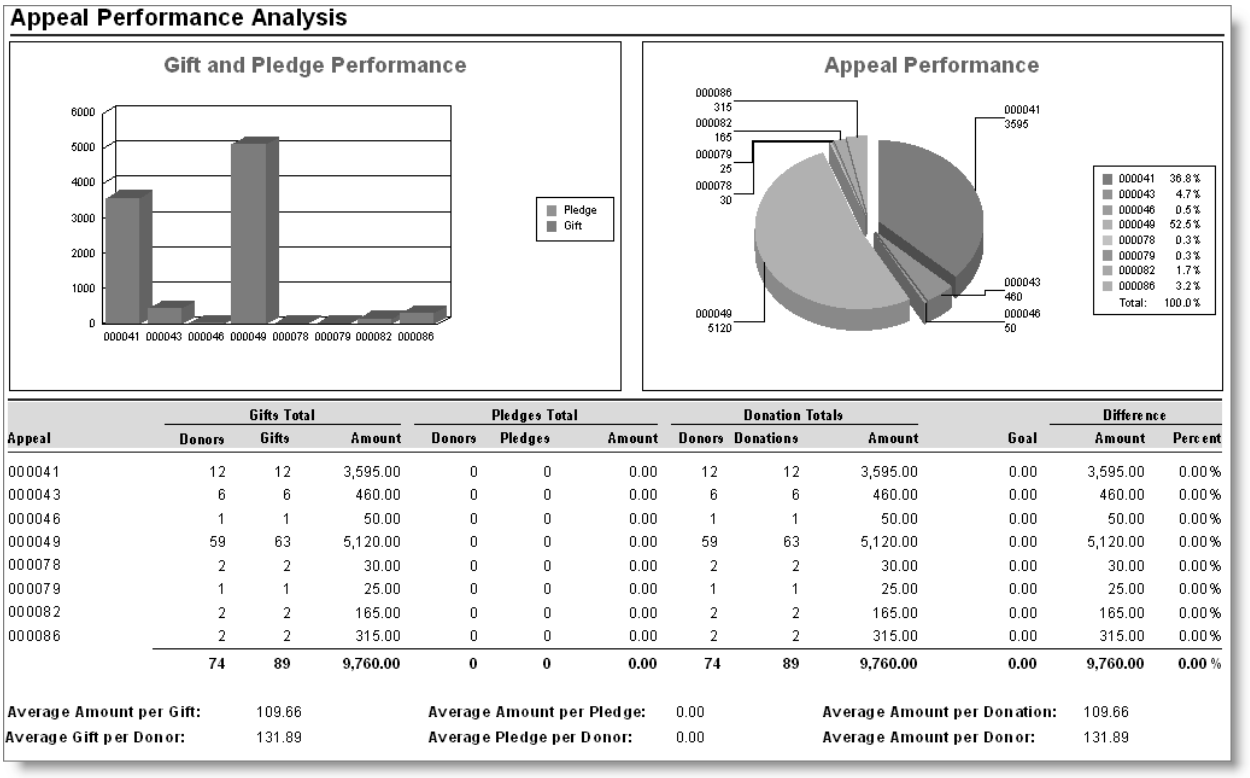
The Appeal Performance Analysis is a comprehensive summary of appeal results and statistics. The report provides a snapshot of each appeal. It lists the total number and total amount of gifts, pledges, and donations; the number of donors; the appeal goal and the amount and percentage difference between the goal and the actual proceeds. Run this report from:

Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Analysis or Fundraising > Executive Window

Note: In this report, Donations include Fundraising, Events, and Dues donations.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Appeal	Gifts Total Donors	Gifts	Amount	Pledges Total Donors	Pledges	Amount	Donation Totals Donors	Donations	Amount	Goal	Difference Amount	Percent
000041	12	12	3,595.00	0	0	0.00	12	12	3,595.00	0.00	3,595.00	0.00%
000043	6	6	460.00	0	0	0.00	6	6	460.00	0.00	460.00	0.00%
000046	1	1	50.00	0	0	0.00	1	1	50.00	0.00	50.00	0.00%
000049	59	63	5,120.00	0	0	0.00	59	63	5,120.00	0.00	5,120.00	0.00%
000078	2	2	30.00	0	0	0.00	2	2	30.00	0.00	30.00	0.00%
000079	1	1	25.00	0	0	0.00	1	1	25.00	0.00	25.00	0.00%
000082	2	2	165.00	0	0	0.00	2	2	165.00	0.00	165.00	0.00%
000086	2	2	315.00	0	0	0.00	2	2	315.00	0.00	315.00	0.00%
	74	**89**	**9,760.00**	**0**	**0**	**0.00**	**74**	**89**	**9,760.00**	**0.00**	**9,760.00**	**0.00%**

Average Amount per Gift:	109.66	**Average Amount per Pledge:**	0.00	**Average Amount per Donation:**	109.66
Average Gift per Donor:	131.89	**Average Pledge per Donor:**	0.00	**Average Amount per Donor:**	131.89

Appeal Performance Analysis report

Appeal Expense report

You can enter these search criteria when printing an Appeal Expense report (Fundraising > Generate reports > Reports > Appeal Expense):

- Appeal code
- Campaign code
- Fund code
- Date range
- Amount range

The system searches for the expense items with exact match on Appeal, Campaign, or Fund if any of these fields are populated.

Date searches

Date searches work with these conditions:

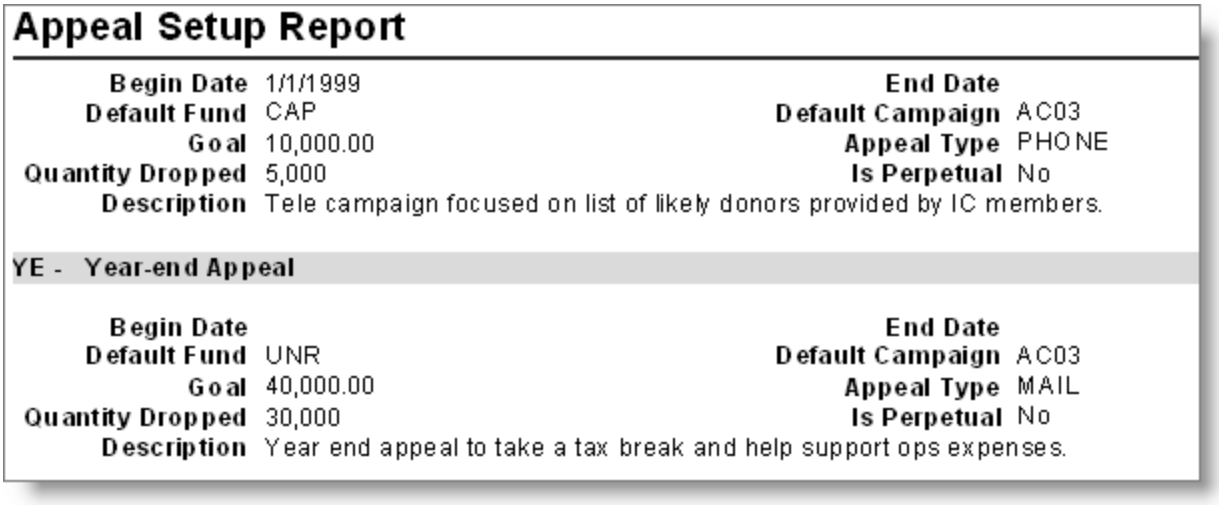
- If only the minimum date is populated, the system searches for any expense items that are equal to or greater than the minimum date.
- If only maximum date is populated, the system searches for any expense items that are equal to or less than the maximum date.
- If both minimum and maximum date are populated, the system finds the expense items that are greater than or equal to minimum date but less than or equal to maximum date.

The rules applied to the amount range are the same as for the date range.

Appeal Setup Report (Crystal)

The Appeal Setup Report lists each Fundraising Appeal and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup
Desktop: Fundraising > Generate Reports > Setup



Appeal Setup Report

Begin Date	1/1/1999	**End Date**	
Default Fund	CAP	**Default Campaign**	AC03
Goal	10,000.00	**Appeal Type**	PHONE
Quantity Dropped	5,000	**Is Perpetual**	No
Description	Tele campaign focused on list of likely donors provided by IC members.		

YE - Year-end Appeal

Begin Date		**End Date**	
Default Fund	UNR	**Default Campaign**	AC03
Goal	40,000.00	**Appeal Type**	MAIL
Quantity Dropped	30,000	**Is Perpetual**	No
Description	Year end appeal to take a tax break and help support ops expenses.		

Appeal Setup Report

Campaign Activity Report (Crystal)

The Campaign Activity Report is a detailed listing of all of the Donation (Gifts and Pledges) Activities listed by Campaign for a given period of time. The report lists campaign, donor, appeal, and payment related information. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity
Desktop: Fundraising > Generate Reports > Activity

Note: In this report, Donations include Fundraising, Events, and Dues donations.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Donations include Gifts and Pledges, including unpaid pledges.

Split donations will be displayed on two or more shaded lines.

Campaign Activity Report

Donor Id	Donor Name	Member Type	Donation Date	Appeal	Fund	Type	Net Donation	Payments	Balance
FALL (Cont...)									
132	Mr. James H. Harrison, Jr., Ph.D.	M	10/17/2002	CAPDM	CAP	G	200.00	0.00	200.00
131	Mr. Larry L. Miller	M	10/17/2002	CAPDM	CAP	G	200.00	0.00	200.00
130	Ms. Karen H. Nelson	M	10/17/2002	CAPDM	CAP	G	200.00	0.00	200.00
129	Mr. Murray K. Jackson	M	10/17/2002	CAPDM	CAP	G	50.00	0.00	50.00
128	Mr. Richard N. Dixon, III, CAE	M	10/17/2002	CAPDM	CAP	G	50.00	0.00	50.00
							1,000.00	**0.00**	**1,000.00**
FALL00									
166	Mr. Douglas Cooper	M	10/12/2000	DM1	SCH	G	7,700.00	0.00	7,700.00
104	Dr. Charles R. Corwin	M	10/12/2000	DM1	SCH	G	500.00	0.00	500.00
110	Mr. Wayne Courtland	M	10/12/2000	DM1	SCH	G	275.00	0.00	275.00
10185	American Business Services	CM	10/12/2000	DM1	SCH	G	500.00	0.00	500.00
10186	Omaha Medical Services	CM	10/12/2000	DM1	SCH	G	2,280.00	0.00	2,280.00
							11,255.00	**0.00**	**11,255.00**

Campaign Activity Report

101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	YE	AF	G	200.00	800.00	-600.00
101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	YE	CAP	G	300.00	1,200.00	-900.00

Split donations are displayed on consecutive shaded lines

Campaign Setup Report (Crystal)

The Campaign Setup Report lists each Fundraising Campaign and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup

Desktop: Fundraising > Generate Reports > Setup

Campaign Setup Report

ED - Campaign for Education & Scholarships

Begin Date 1/1/2000 **End Date**

Default Fund EF **Is Perpetual** Yes

Goal 100,000.00

Description Campaign to maintain and expand the scholarship and education fund.

Campaign Setup Report

Distribution Activity by Campaign (Crystal)

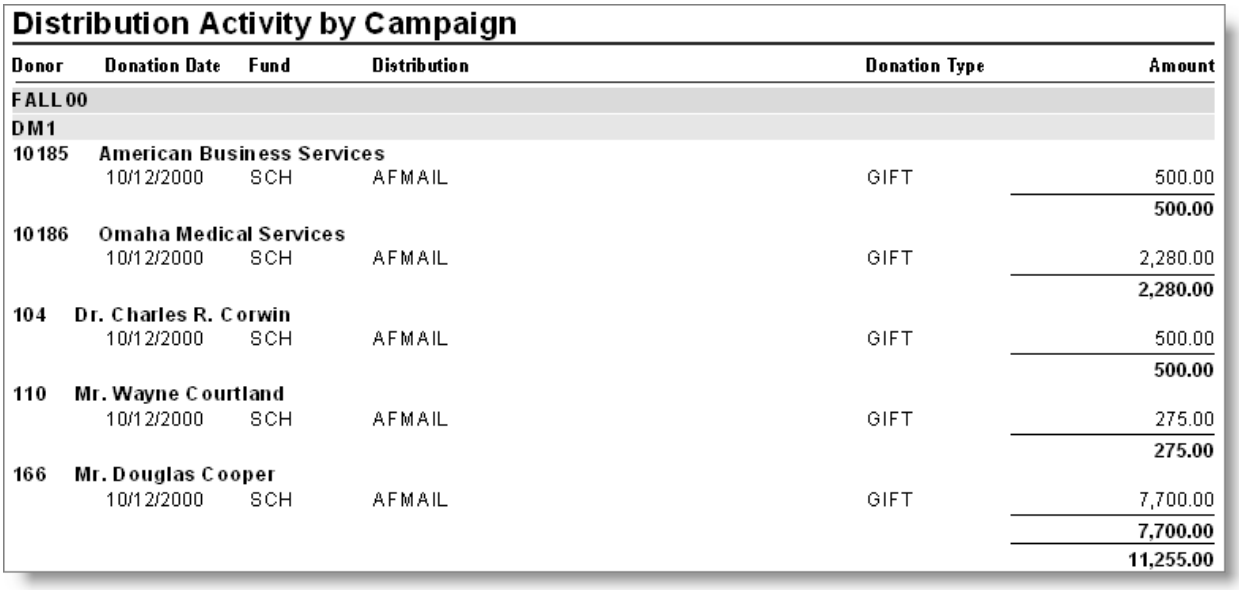
The Distribution Activity by Campaign report lists all Donation (Gift and Pledge) Activities grouped by Campaign, Appeal, Donor ID, Transaction, and Distribution.

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity
Desktop: Fundraising > Generate Reports > Activity

Note: This report includes Donations from Fundraising only. Events and Subscriptions donations are not included in this report.

Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Distribution Activity by Campaign

Donor	Donation Date	Fund	Distribution	Donation Type	Amount
FALL00					
DM1					
10185	American Business Services				
	10/12/2000	SCH	AFMAIL	GIFT	500.00
					500.00
10186	Omaha Medical Services				
	10/12/2000	SCH	AFMAIL	GIFT	2,280.00
					2,280.00
104	Dr. Charles R. Corwin				
	10/12/2000	SCH	AFMAIL	GIFT	500.00
					500.00
110	Mr. Wayne Courtland				
	10/12/2000	SCH	AFMAIL	GIFT	275.00
					275.00
166	Mr. Douglas Cooper				
	10/12/2000	SCH	AFMAIL	GIFT	7,700.00
					7,700.00
					11,255.00

Distribution Activity by Campaign

Distribution Activity Report (Crystal)

The Distribution Activity Report lists all Donation (Gift and Pledge) Activities grouped by Distribution, Donor ID, and Original Transaction. Run this report from:

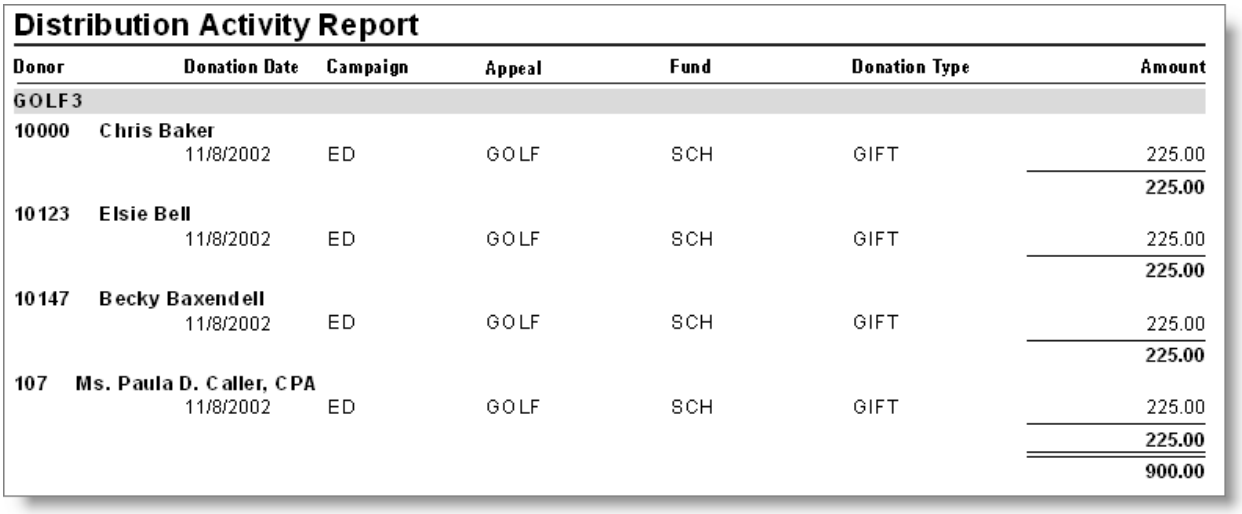
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity
Desktop: Fundraising > Generate Reports > Activity

Note:

This report includes Donations from Fundraising only. Events and Subscriptions donations are not included in this report.

Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Distribution Activity Report

Donor	Donation Date	Campaign	Appeal	Fund	Donation Type	Amount
GOLF3						
10000 Chris Baker						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
10123 Elsie Bell						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
10147 Becky Baxendell						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
107 Ms. Paula D. Caller, CPA						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
						900.00

Distribution Activity Report

Distribution Performance Analysis (Crystal)

The Distribution Performance Analysis report provides a summary of the sources for each distribution category. The report aggregates the number and amount of gifts, pledges, and donations; the number of donors; and the percentage each distribution category makes up of the sum of all distribution donations. Run this report from:

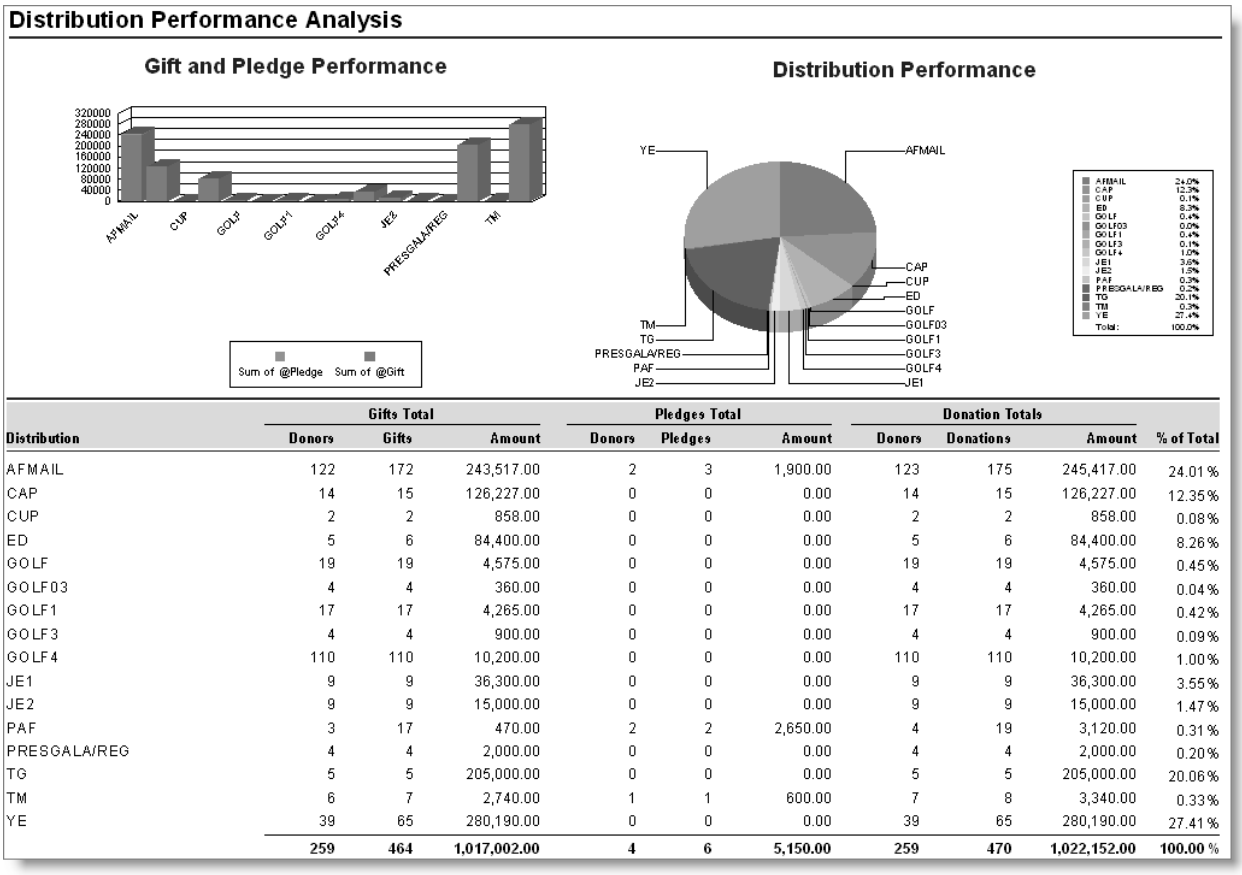
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Desktop: Fundraising > Generate Reports > Analysis

Note:

This report includes Donations from Fundraising only. Events and Subscriptions donations are not included in this report.

Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Distribution	Gifts Total			Pledges Total			Donation Totals			% of Total
	Donors	Gifts	Amount	Donors	Pledges	Amount	Donors	Donations	Amount	
AFMAIL	122	172	243,517.00	2	3	1,900.00	123	175	245,417.00	24.01 %
CAP	14	15	126,227.00	0	0	0.00	14	15	126,227.00	12.35 %
CUP	2	2	858.00	0	0	0.00	2	2	858.00	0.08 %
ED	5	6	84,400.00	0	0	0.00	5	6	84,400.00	8.26 %
GOLF	19	19	4,575.00	0	0	0.00	19	19	4,575.00	0.45 %
GOLF03	4	4	360.00	0	0	0.00	4	4	360.00	0.04 %
GOLF1	17	17	4,265.00	0	0	0.00	17	17	4,265.00	0.42 %
GOLF3	4	4	900.00	0	0	0.00	4	4	900.00	0.09 %
GOLF4	110	110	10,200.00	0	0	0.00	110	110	10,200.00	1.00 %
JE1	9	9	36,300.00	0	0	0.00	9	9	36,300.00	3.55 %
JE2	9	9	15,000.00	0	0	0.00	9	9	15,000.00	1.47 %
PAF	3	17	470.00	2	2	2,650.00	4	19	3,120.00	0.31 %
PRESGALA/REG	4	4	2,000.00	0	0	0.00	4	4	2,000.00	0.20 %
TG	5	5	205,000.00	0	0	0.00	5	5	205,000.00	20.06 %
TM	6	7	2,740.00	1	1	600.00	7	8	3,340.00	0.33 %
YE	39	65	280,190.00	0	0	0.00	39	65	280,190.00	27.41 %
	259	**464**	**1,017,002.00**	**4**	**6**	**5,150.00**	**259**	**470**	**1,022,152.00**	**100.00 %**

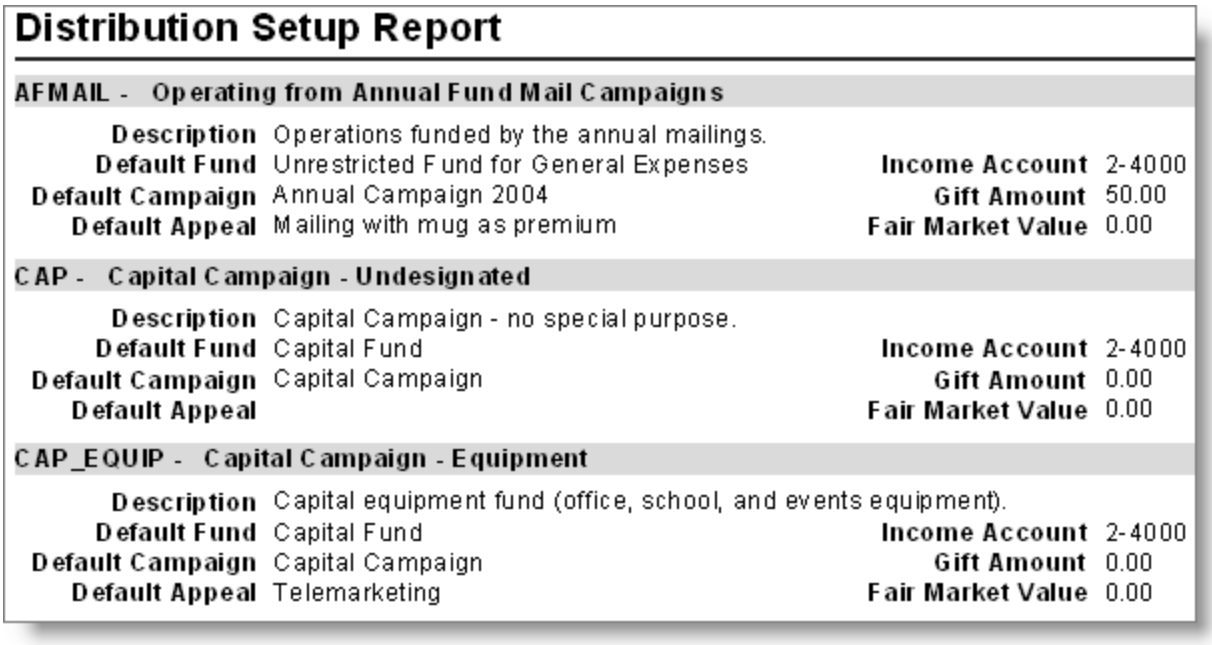
Distribution Performance Analysis

Distribution Setup Report (Crystal)

The Distribution Setup Report lists each Fundraising Distribution and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup

Desktop: Fundraising > Generate Reports > Setup



Distribution Setup Report

AFMAIL - Operating from Annual Fund Mail Campaigns

Description	Operations funded by the annual mailings.		
Default Fund	Unrestricted Fund for General Expenses	**Income Account**	2-4000
Default Campaign	Annual Campaign 2004	**Gift Amount**	50.00
Default Appeal	Mailing with mug as premium	**Fair Market Value**	0.00

CAP - Capital Campaign - Undesignated

Description	Capital Campaign - no special purpose.		
Default Fund	Capital Fund	**Income Account**	2-4000
Default Campaign	Capital Campaign	**Gift Amount**	0.00
Default Appeal		**Fair Market Value**	0.00

CAP_EQUIP - Capital Campaign - Equipment

Description	Capital equipment fund (office, school, and events equipment).		
Default Fund	Capital Fund	**Income Account**	2-4000
Default Campaign	Capital Campaign	**Gift Amount**	0.00
Default Appeal	Telemarketing	**Fair Market Value**	0.00

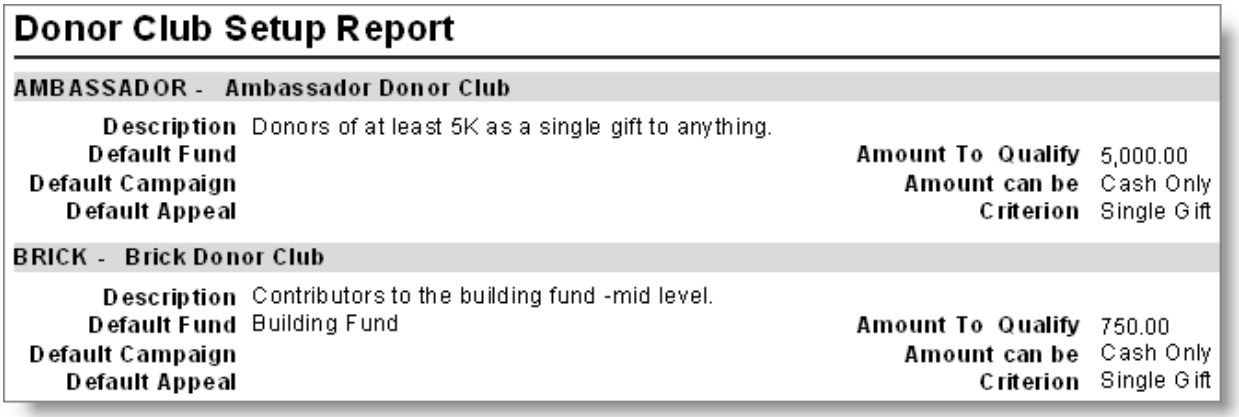
Distribution Setup Report

Donor Club Setup Report (Crystal)

The Donor Club Setup Report lists each Fundraising Donor Club and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup

Desktop: Fundraising > Generate Reports > Setup



Donor Club Setup Report

AMBASSADOR - Ambassador Donor Club

Description	Donors of at least 5K as a single gift to anything.		
Default Fund		**Amount To Qualify**	5,000.00
Default Campaign		**Amount can be**	Cash Only
Default Appeal		**Criterion**	Single Gift

BRICK - Brick Donor Club

Description	Contributors to the building fund -mid level.		
Default Fund	Building Fund	**Amount To Qualify**	750.00
Default Campaign		**Amount can be**	Cash Only
Default Appeal		**Criterion**	Single Gift

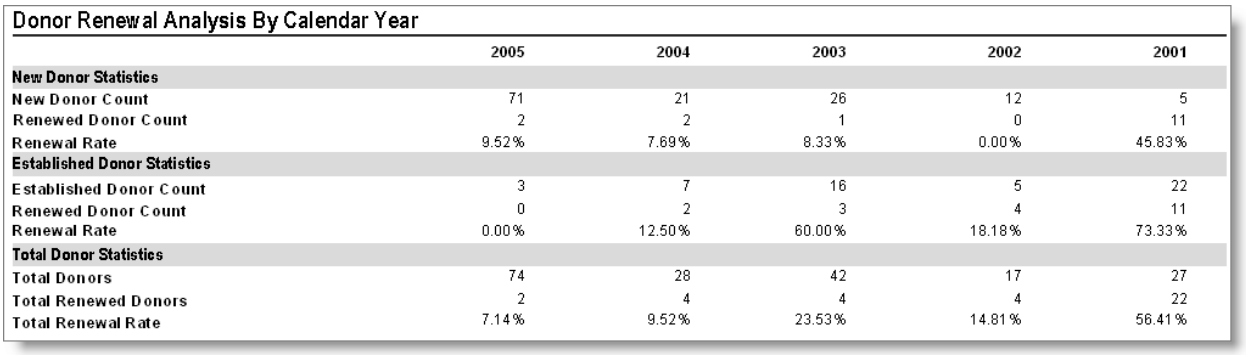
Donor Club Setup Report

Donor Renewal Analysis by Calendar Year report

The Donor Renewal Analysis by Calendar Year report shows the number of new and established donors, and their renewal rates. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Desktop: Fundraising > Analysis

Note: To view this report for a fiscal year, run the Donor Renewal Analysis report.



Donor Renewal Analysis By Calendar Year

	2005	2004	2003	2002	2001
New Donor Statistics					
New Donor Count	71	21	26	12	5
Renewed Donor Count	2	2	1	0	11
Renewal Rate	9.52%	7.69%	8.33%	0.00%	45.83%
Established Donor Statistics					
Established Donor Count	3	7	16	5	22
Renewed Donor Count	0	2	3	4	11
Renewal Rate	0.00%	12.50%	60.00%	18.18%	73.33%
Total Donor Statistics					
Total Donors	74	28	42	17	27
Total Renewed Donors	2	4	4	4	22
Total Renewal Rate	7.14%	9.52%	23.53%	14.81%	56.41%

Donor Renewal Analysis by Calendar Year

Fund Activity Report (Crystal)

The Fund Activity Report lists all Donation (Gifts and Pledges) Activities related to each Fund within a given period of time.

Note: This is a transaction-based report.

Run this report from:

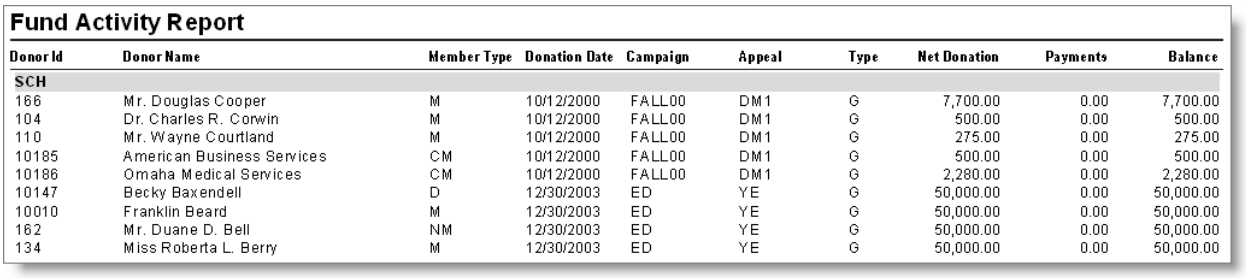
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Activity, Fundraising > Executive Window

Note:

In this report, Donations include Fundraising, Events, and Dues donations.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Donations include Gifts and Pledges, including unpaid pledges.



Fund Activity Report

Donor Id	Donor Name	Member Type	Donation Date	Campaign	Appeal	Type	Net Donation	Payments	Balance
SCH									
166	Mr. Douglas Cooper	M	10/12/2000	FALL00	DM1	G	7,700.00	0.00	7,700.00
104	Dr. Charles R. Corwin	M	10/12/2000	FALL00	DM1	G	500.00	0.00	500.00
110	Mr. Wayne Courtland	M	10/12/2000	FALL00	DM1	G	275.00	0.00	275.00
10185	American Business Services	CM	10/12/2000	FALL00	DM1	G	500.00	0.00	500.00
10186	Omaha Medical Services	CM	10/12/2000	FALL00	DM1	G	2,280.00	0.00	2,280.00
10147	Becky Baxendell	D	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00
10010	Franklin Beard	M	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00
162	Mr. Duane D. Bell	NM	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00
134	Miss Roberta L. Berry	M	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00

Fund Activity Report

Fund Performance Analysis report (Crystal)

The Fund Performance Analysis report summarizes the Gift, Pledge, and Donation totals for each fund. The report also shows averages for Gifts, Pledges, and Donations by transaction and by donor. Run this report from:

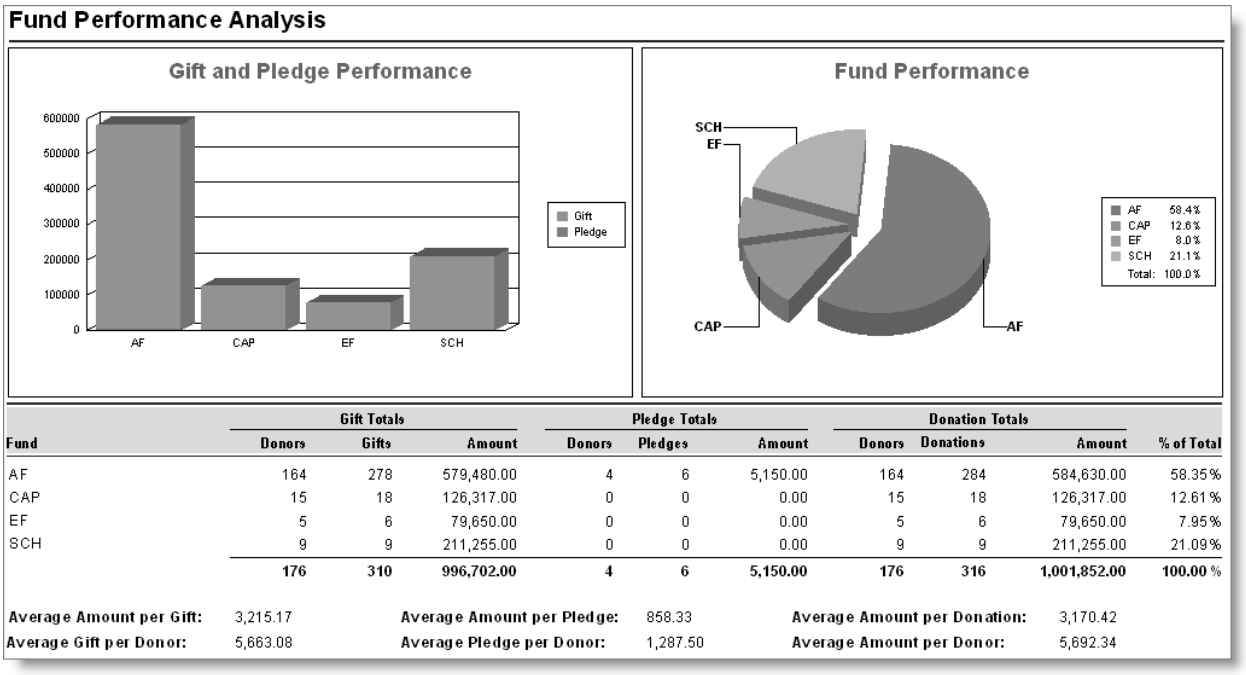
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Desktop: Fundraising > Generate Reports > Analysis

Note:

In this report, Donations include Fundraising, Events, and Dues donations.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Donations include Gifts and Pledges, including unpaid pledges.



Fund Performance Analysis

Gift and Pledge Performance

Fund Performance

Fund	Gift Totals Donors	Gifts	Amount	Pledge Totals Donors	Pledges	Amount	Donation Totals Donors	Donations	Amount	% of Total
AF	164	278	579,480.00	4	6	5,150.00	164	284	584,630.00	58.35%
CAP	15	18	126,317.00	0	0	0.00	15	18	126,317.00	12.61%
EF	5	6	79,650.00	0	0	0.00	5	6	79,650.00	7.95%
SCH	9	9	211,255.00	0	0	0.00	9	9	211,255.00	21.09%
	176	**310**	**996,702.00**	**4**	**6**	**5,150.00**	**176**	**316**	**1,001,852.00**	**100.00%**

Average Amount per Gift:	3,215.17	**Average Amount per Pledge:**	858.33	**Average Amount per Donation:**	3,170.42
Average Gift per Donor:	5,663.08	**Average Pledge per Donor:**	1,287.50	**Average Amount per Donor:**	5,692.34

Fund Performance Analysis

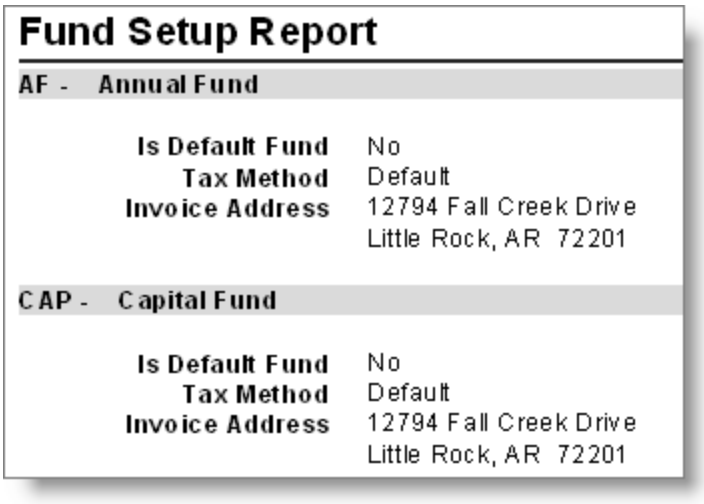
Fund Setup Report (Crystal)

The Fund Setup Report lists each Fundraising Fund and its current configuration in iMIS.

Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup

Desktop: Fundraising > Generate Reports > Setup



Fund Setup Report

AF - Annual Fund

Is Default Fund	No
Tax Method	Default
Invoice Address	12794 Fall Creek Drive Little Rock, AR 72201

CAP - Capital Fund

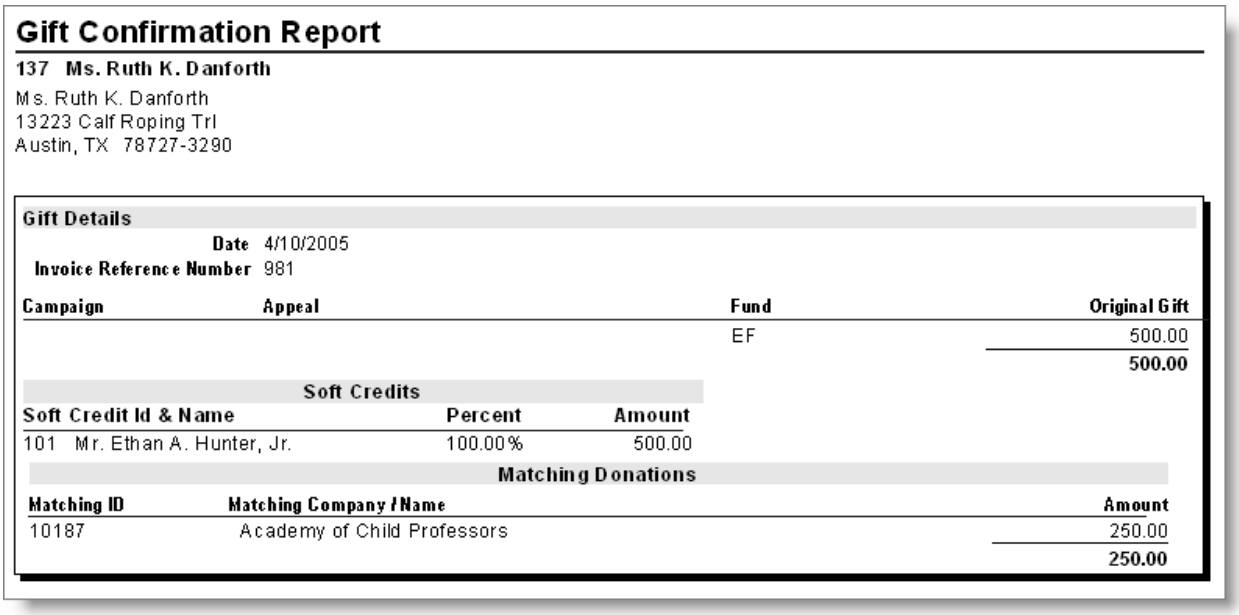
Is Default Fund	No
Tax Method	Default
Invoice Address	12794 Fall Creek Drive Little Rock, AR 72201

Fund Setup Report

Gift Confirmation Report (Crystal)

The Gift Confirmation Report provides details about a donor's gifts including soft credits and matching gifts if there are any. Gifts are listed singly, grouped by donor.

Run this report from: Fundraising > Generate Reports > Reports, Fundraising > Executive Window



Gift Confirmation Report

137 Ms. Ruth K. Danforth

Ms. Ruth K. Danforth
13223 Calf Roping Trl
Austin, TX 78727-3290

Gift Details

Date 4/10/2005
Invoice Reference Number 981

Campaign	Appeal	Fund	Original Gift
		EF	500.00
			500.00

Soft Credits

Soft Credit Id & Name	Percent	Amount
101 Mr. Ethan A. Hunter, Jr.	100.00%	500.00

Matching Donations

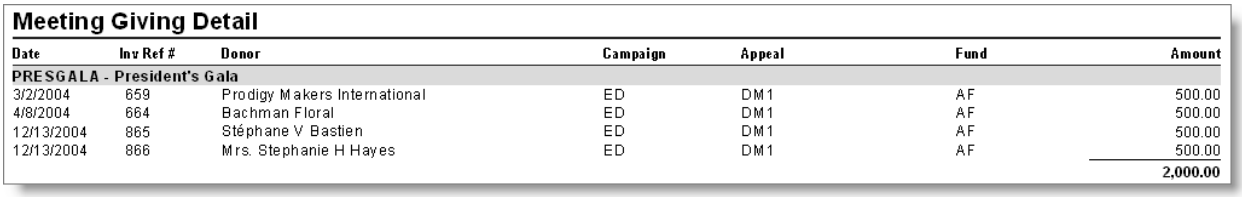
Matching ID	Matching Company / Name	Amount
10187	Academy of Child Professors	250.00
		250.00

Gift Confirmation Report

Meeting Giving Detail (Crystal)

The Meeting Giving Detail report provides information, grouped by event, about the Fundraising donations made in association with events. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Desktop: Fundraising > Generate Reports > Reports



Meeting Giving Detail

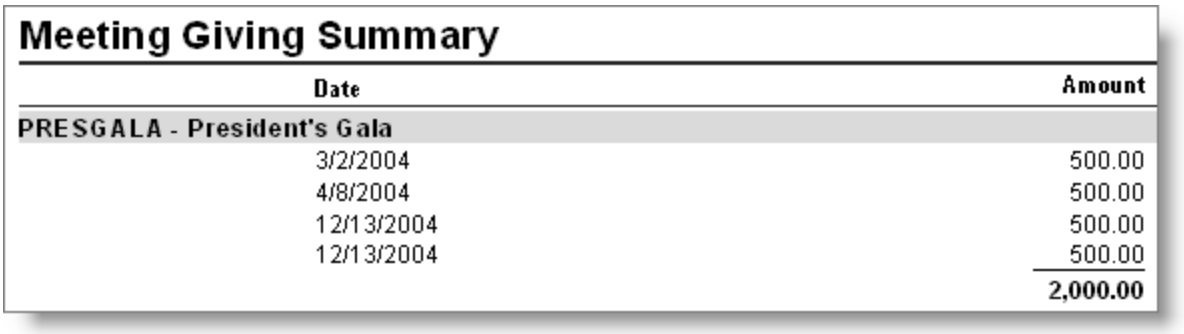
Date	Inv Ref #	Donor	Campaign	Appeal	Fund	Amount
PRESGALA - President's Gala						
3/2/2004	659	Prodigy Makers International	ED	DM1	AF	500.00
4/8/2004	664	Bachman Floral	ED	DM1	AF	500.00
12/13/2004	865	Stéphane V Bastien	ED	DM1	AF	500.00
12/13/2004	866	Mrs. Stephanie H Hayes	ED	DM1	AF	500.00
						2,000.00

Meeting Giving Detail

Meeting Giving Summary (Crystal)

The Meeting Giving Summary report provides the amounts and totals of donations given in association with specific events.

Run this report from: Fundraising > Generate Reports > Reports, Fundraising > Executive Window



Meeting Giving Summary

Date	Amount
PRESGALA - President's Gala	
3/2/2004	500.00
4/8/2004	500.00
12/13/2004	500.00
12/13/2004	500.00
	2,000.00

Meeting Giving Summary

Monthly Donations Summary by Fiscal Period Report (Crystal)

The Monthly Donations Summary by Fiscal Period Report lists all Gifts, Pledges, and Total Donations for each Fiscal month in a Fiscal year. Run this report from:

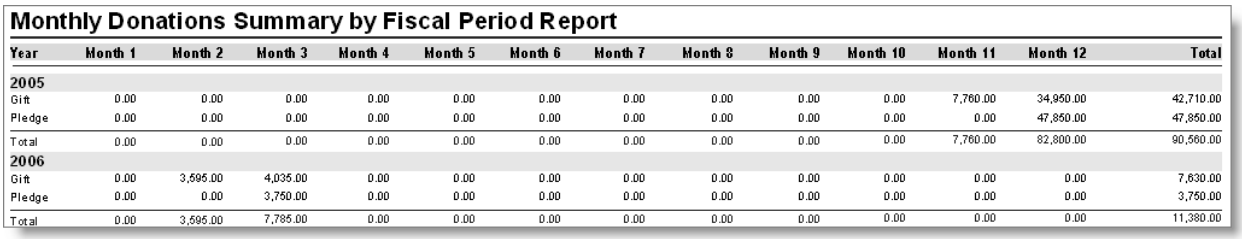
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Desktop: Fundraising > Generate Reports > Reports

Note:

In this report, Donations include Fundraising, Events, and Dues donations.

Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Monthly Donations Summary by Fiscal Period Report

Year	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Total
2005													
Gift	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,760.00	34,950.00	42,710.00
Pledge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47,850.00	47,850.00
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,760.00	82,800.00	90,560.00
2006													
Gift	0.00	3,595.00	4,035.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,630.00
Pledge	0.00	0.00	3,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,750.00
Total	0.00	3,595.00	7,785.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11,380.00

Monthly Donations Summary by Fiscal Period Report

Monthly Donations Summary Report (Crystal)

The Monthly Donations Summary Report lists all Gifts, Pledges, and total donation amounts for each month in the calendar year. Run this report from:

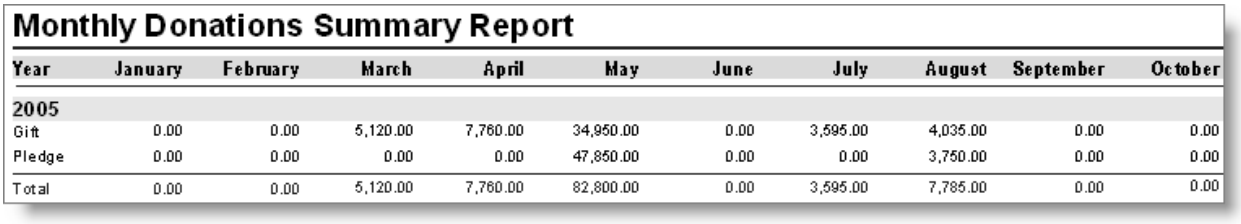
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note:

In this report, Donations include Fundraising, Events, and Dues donations.

Donations include Gifts and Pledges, including unpaid pledges.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.



Monthly Donations Summary Report

Year	January	February	March	April	May	June	July	August	September	October
2005										
Gift	0.00	0.00	5,120.00	7,760.00	34,950.00	0.00	3,595.00	4,035.00	0.00	0.00
Pledge	0.00	0.00	0.00	0.00	47,850.00	0.00	0.00	3,750.00	0.00	0.00
Total	0.00	0.00	5,120.00	7,760.00	82,800.00	0.00	3,595.00	7,785.00	0.00	0.00

Monthly Donations Summary Report

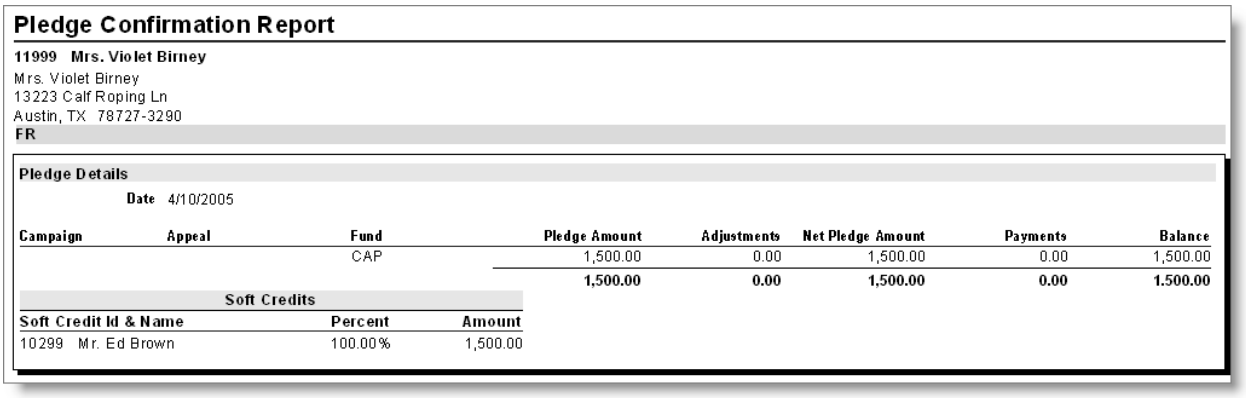
Pledge Confirmation Report (Crystal)

The Pledge Confirmation Report provides details about a donor's pledges, including soft credits if there are any. Pledges are listed singly, grouped by donor. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note:

This report includes Donations from Fundraising and Events only. Subscriptions donations are not included in this report.



Pledge Confirmation Report

11999 Mrs. Violet Birney
Mrs. Violet Birney
13223 Calf Roping Ln
Austin, TX 78727-3290
FR

Pledge Details

Date 4/10/2005

Campaign	Appeal	Fund	Pledge Amount	Adjustments	Net Pledge Amount	Payments	Balance
		CAP	1,500.00	0.00	1,500.00	0.00	1,500.00
			1,500.00	**0.00**	**1,500.00**	**0.00**	**1.500.00**

Soft Credits

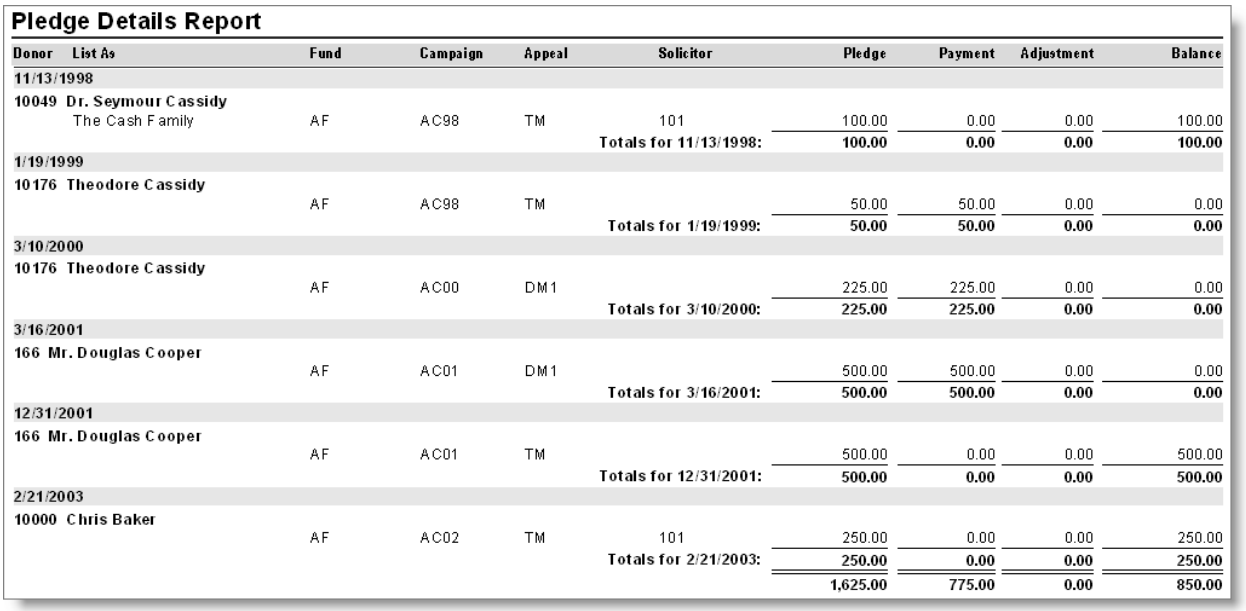
Soft Credit Id & Name	Percent	Amount
10299 Mr. Ed Brown	100.00%	1,500.00

Pledge Confirmation Report

Pledge Details Report

The Pledge Details Report shows detailed information about pledges. It can be filtered by time period, Campaign, Appeal, or Fund. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Desktop: Fundraising > Reports



Pledge Details Report

Donor List As	Fund	Campaign	Appeal	Solicitor	Pledge	Payment	Adjustment	Balance
11/13/1998								
10049 Dr. Seymour Cassidy								
The Cash Family	AF	AC98	TM	101	100.00	0.00	0.00	100.00
				Totals for 11/13/1998:	**100.00**	**0.00**	**0.00**	**100.00**
1/19/1999								
10176 Theodore Cassidy								
	AF	AC98	TM		50.00	50.00	0.00	0.00
				Totals for 1/19/1999:	**50.00**	**50.00**	**0.00**	**0.00**
3/10/2000								
10176 Theodore Cassidy								
	AF	AC00	DM1		225.00	225.00	0.00	0.00
				Totals for 3/10/2000:	**225.00**	**225.00**	**0.00**	**0.00**
3/16/2001								
166 Mr. Douglas Cooper								
	AF	AC01	DM1		500.00	500.00	0.00	0.00
				Totals for 3/16/2001:	**500.00**	**500.00**	**0.00**	**0.00**
12/31/2001								
166 Mr. Douglas Cooper								
	AF	AC01	TM		500.00	0.00	0.00	500.00
				Totals for 12/31/2001:	**500.00**	**0.00**	**0.00**	**500.00**
2/21/2003								
10000 Chris Baker								
	AF	AC02	TM	101	250.00	0.00	0.00	250.00
				Totals for 2/21/2003:	**250.00**	**0.00**	**0.00**	**250.00**
					1,625.00	**775.00**	**0.00**	**850.00**

Pledge Details Report

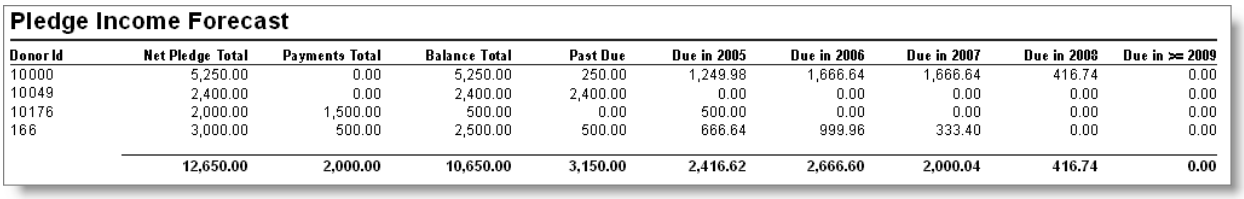
Pledge Income Forecast (Crystal)

The Pledge Income Forecast report provides a summary of all pledges, payments on them, remaining balances, past due balances and expected pledge payments for the

current year (CY) and for the current year plus 1, 2, 3, and 4 years and beyond (CY+1, CY+2, CY+3, CY+4 and beyond).

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Analysis, Fundraising > Executive Window

Note: This report displays pledges with balances only. It does not display pledges that are paid in full.



Pledge Income Forecast

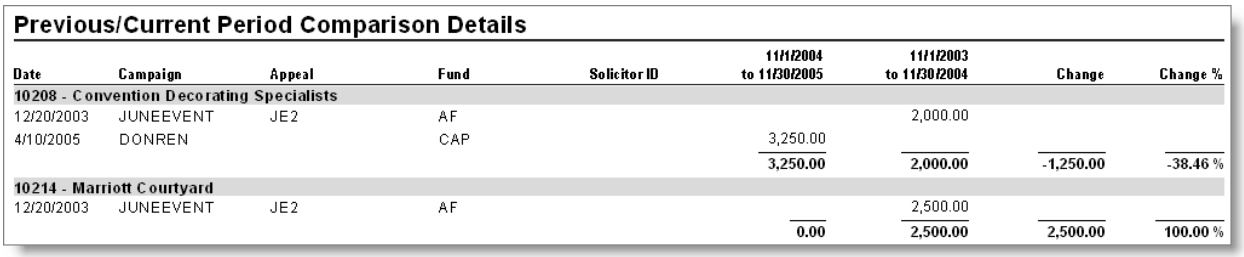
Donor Id	Net Pledge Total	Payments Total	Balance Total	Past Due	Due in 2005	Due in 2006	Due in 2007	Due in 2008	Due in >= 2009
10000	5,250.00	0.00	5,250.00	250.00	1,249.98	1,666.64	1,666.64	416.74	0.00
10049	2,400.00	0.00	2,400.00	2,400.00	0.00	0.00	0.00	0.00	0.00
10176	2,000.00	1,500.00	500.00	0.00	500.00	0.00	0.00	0.00	0.00
166	3,000.00	500.00	2,500.00	500.00	666.64	999.96	333.40	0.00	0.00
	12,650.00	**2,000.00**	**10,650.00**	**3,150.00**	**2,416.62**	**2,666.60**	**2,000.04**	**416.74**	**0.00**

Pledge Income Forecast

Previous/Current Period Comparison Details report

The Previous/Current Period Comparison Details report compares donors' giving between two different time periods. The report can be filtered by Campaign, Appeal, and Fund and can be run for one or for all donors. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window



Previous/Current Period Comparison Details

Date	Campaign	Appeal	Fund	Solicitor ID	11/1/2004 to 11/30/2005	11/1/2003 to 11/30/2004	Change	Change %
10208 - Convention Decorating Specialists								
12/20/2003	JUNEEVENT	JE2	AF			2,000.00		
4/10/2005	DONREN		CAP		3,250.00			
					3,250.00	**2,000.00**	**-1,250.00**	**-38.46 %**
10214 - Marriott Courtyard								
12/20/2003	JUNEEVENT	JE2	AF			2,500.00		
					0.00	**2,500.00**	**2,500.00**	**100.00 %**

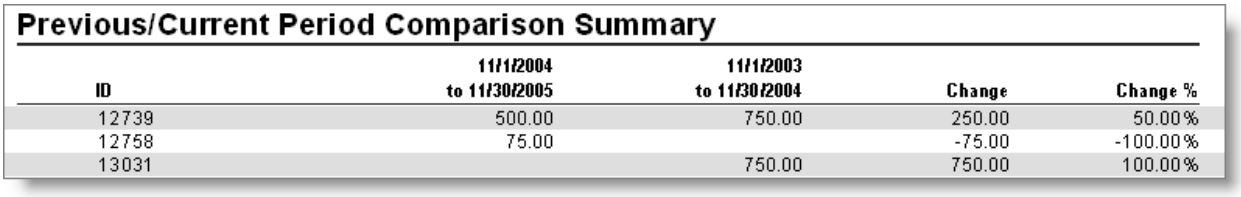
Previous/Current Period Comparison Details

Previous/Current Period Comparison Summary report

The Previous/Current Period Comparison Summary report compares donation amounts by ID between two different periods. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: The report can be filtered by Campaign, Fund, and Appeal, but this information is not listed on the report.



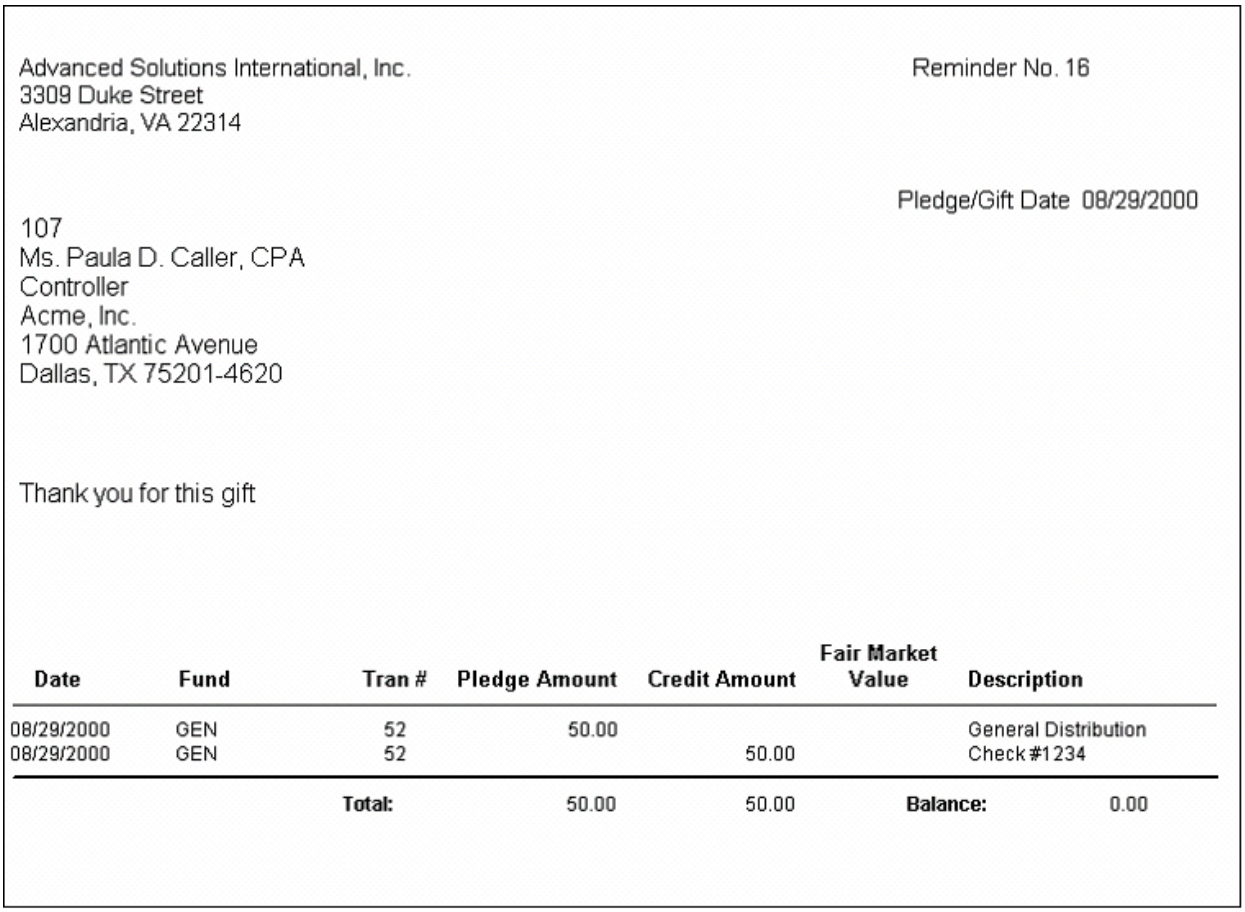
Previous/Current Period Comparison Summary

ID	11/1/2004 to 11/30/2005	11/1/2003 to 11/30/2004	Change	Change %
12739	500.00	750.00	250.00	50.00%
12758	75.00		-75.00	-100.00%
13031		750.00	750.00	100.00%

Previous/Current Period Comparison Summary

Reminder report

Reminder reports are used to issue reminders for gifts received and installments due within a given time period. There are several reminder reports available.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Reminder No. 16

Pledge/Gift Date 08/29/2000

107
Ms. Paula D. Caller, CPA
Controller
Acme, Inc.
1700 Atlantic Avenue
Dallas, TX 75201-4620

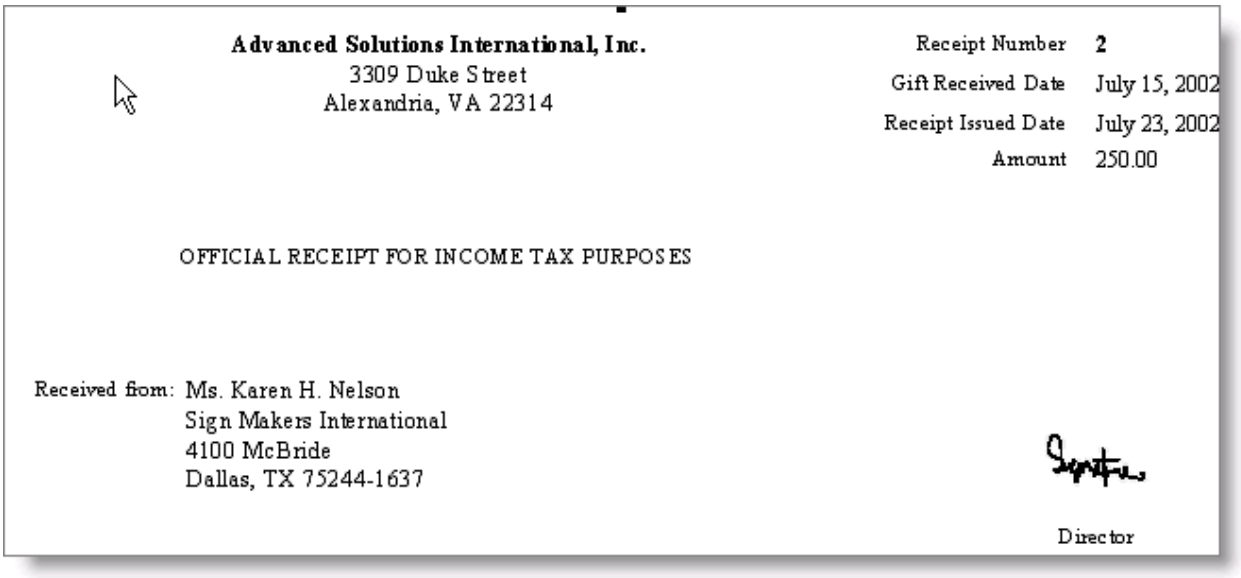
Thank you for this gift

Date	Fund	Tran #	Pledge Amount	Credit Amount	Fair Market Value	Description
08/29/2000	GEN	52	50.00			General Distribution
08/29/2000	GEN	52		50.00		Check #1234
		Total:	50.00	50.00	**Balance:**	0.00

Reminder report

Receipt report

Receipt reports are used to issue receipts for gifts and pledge installments.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Receipt Number 2
Gift Received Date July 15, 2002
Receipt Issued Date July 23, 2002
Amount 250.00

OFFICIAL RECEIPT FOR INCOME TAX PURPOSES

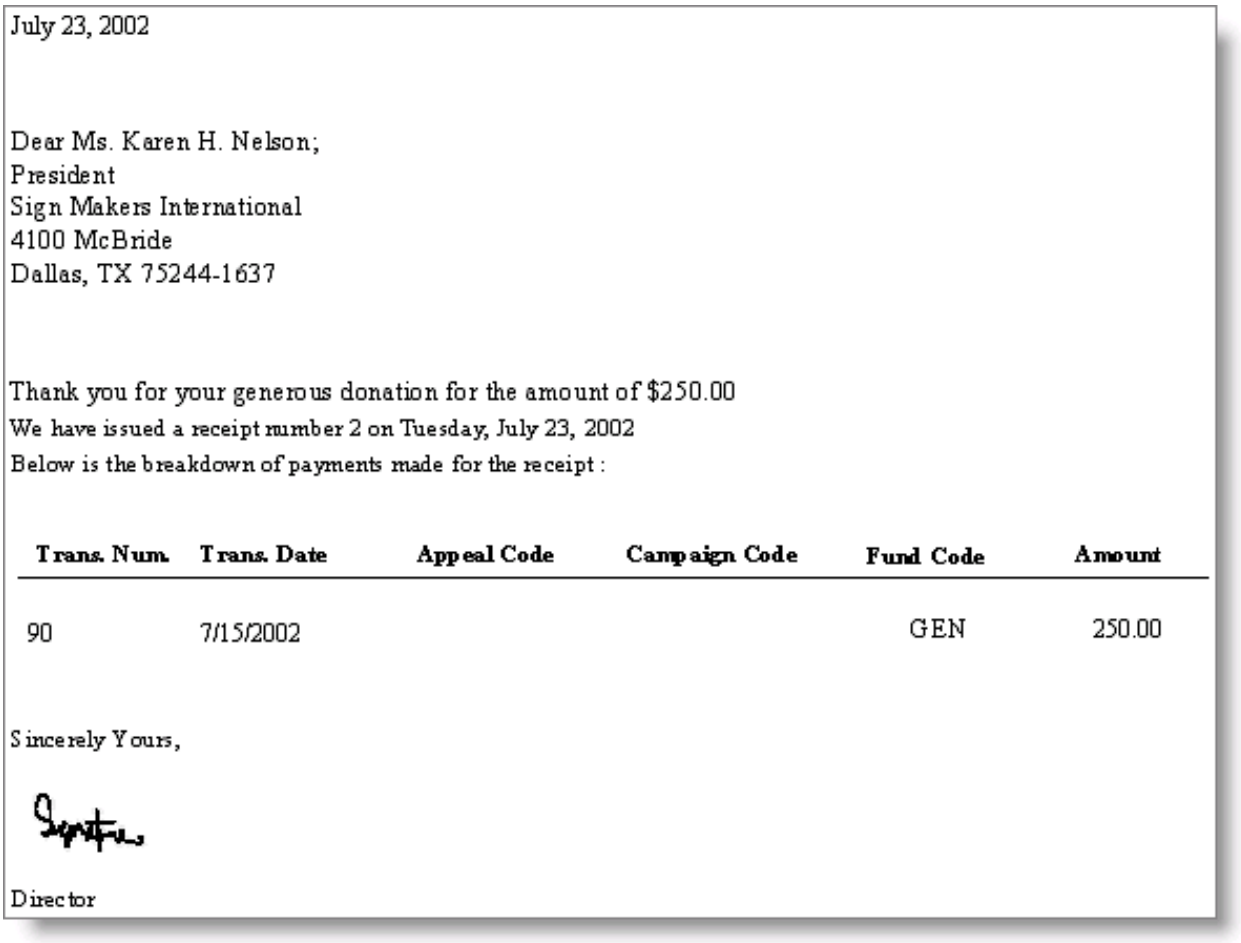
Received from: Ms. Karen H. Nelson
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

Director

Receipt report

Receipt Thank You report

Receipt Thank You reports are used to create thank you letters that include the receipt amount and the breakdown of gifts received.



July 23, 2002

Dear Ms. Karen H. Nelson;
President
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

Thank you for your generous donation for the amount of $250.00
We have issued a receipt number 2 on Tuesday, July 23, 2002
Below is the breakdown of payments made for the receipt :

Trans. Num.	Trans. Date	Appeal Code	Campaign Code	Fund Code	Amount
90	7/15/2002			GEN	250.00

Sincerely Yours,

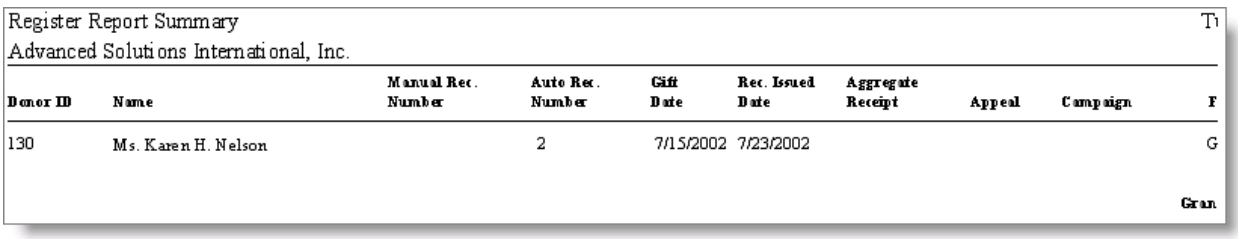
Director

Admin Console: Continuum > Fundraising reports > Receipt Thank You > Sample Thank You (Crystal)

Desktop: Fundraising > Generate reports > Receipt Thank You > Sample Thank You (Crystal)

Register report

Register Reports are used to print a report of receipts in detail or summary format.



Register Report Summary
Advanced Solutions International, Inc.

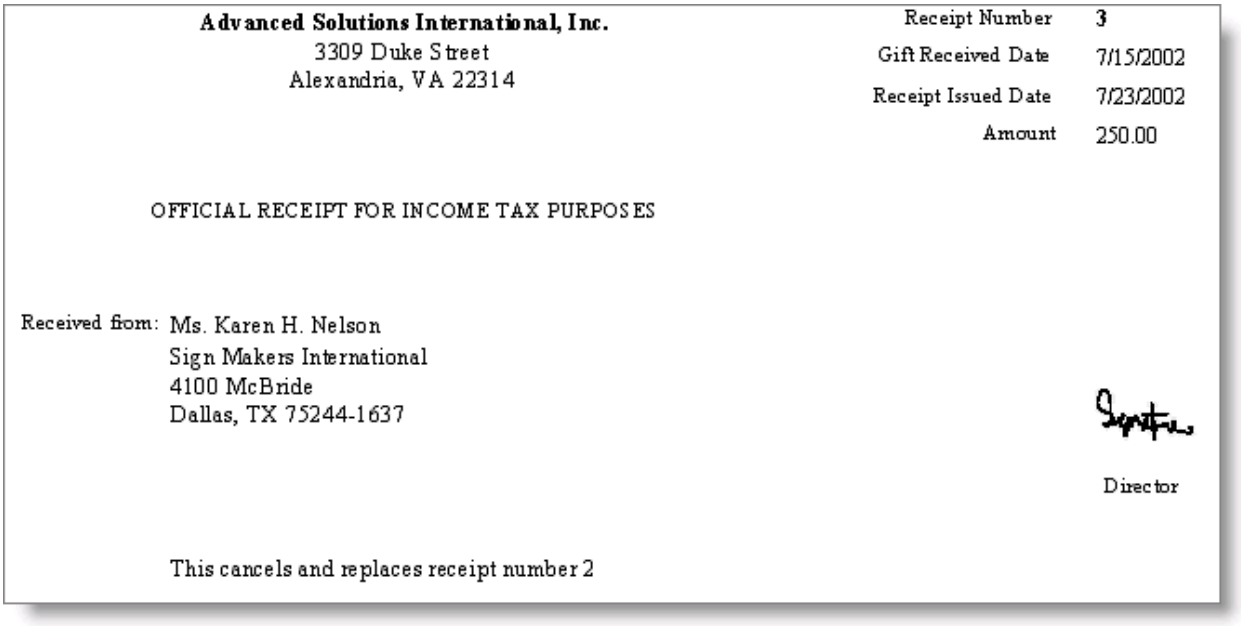
Donor ID	Name	Manual Rec. Number	Auto Rec. Number	Gift Date	Rec. Issued Date	Aggregate Receipt	Appeal	Campaign	F
130	Ms. Karen H. Nelson		2	7/15/2002	7/23/2002				G

Gran

Admin Console: Continuum > Fundraising reports > Reports, select a report from Available Reports
Desktop: Fundraising > Generate reports > Register Report > Report Types > Available Reports

Replacement Receipt report

Replacement Receipt reports are used to generate replacement receipts.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Receipt Number 3
Gift Received Date 7/15/2002
Receipt Issued Date 7/23/2002
Amount 250.00

OFFICIAL RECEIPT FOR INCOME TAX PURPOSES

Received from: Ms. Karen H. Nelson
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

Director

This cancels and replaces receipt number 2

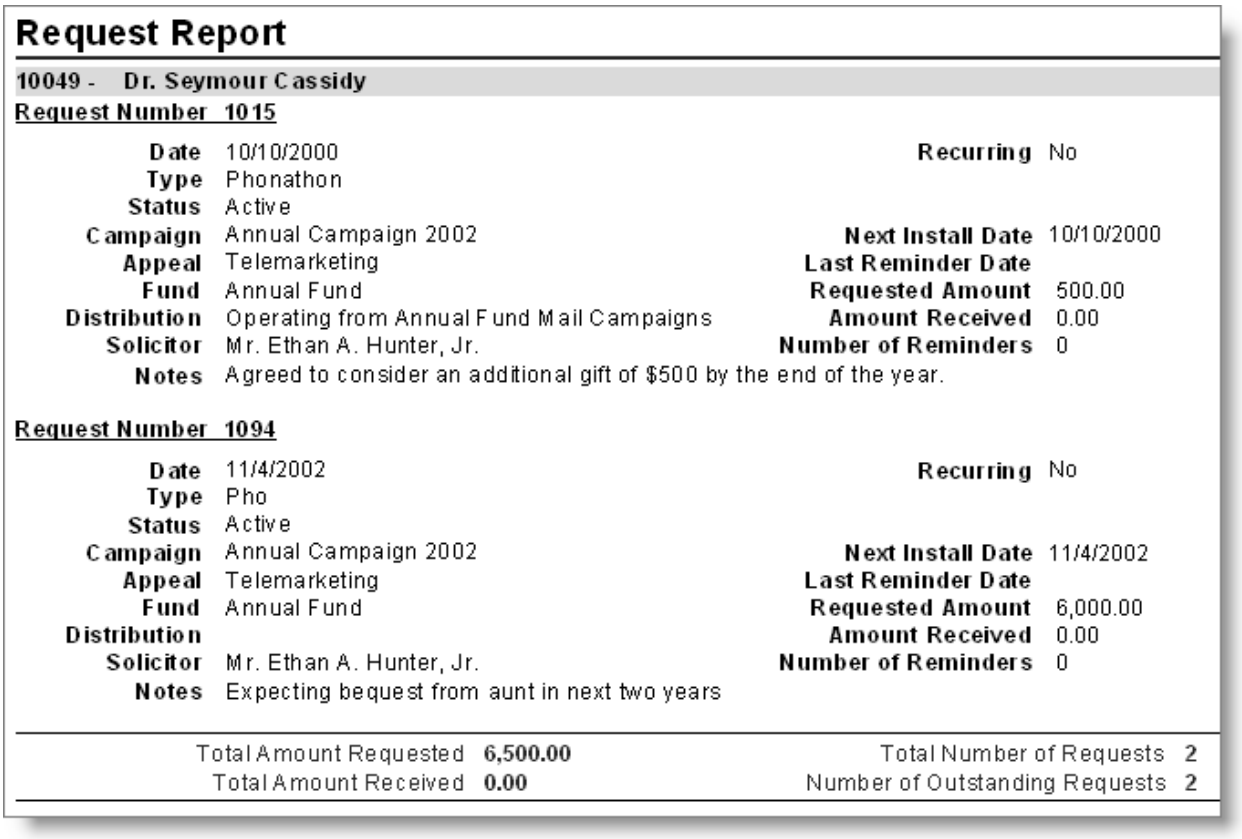
Admin Console: Continuum > Fundraising reports > Replacement Receipt
Desktop: Fundraising > Generate reports > Replacement Receipt from the Report Types scrolling list, select a report from the Available Reports scrolling list

Request Report (Crystal)

The Request Report lists the details of requests made to each donor, and the total amount of donations that resulted from those requests. The report can be run for one or for all donors, and can be filtered by ID, Campaign, Appeal, Fund, and Date Range based on Request Date. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Donations include Gifts and Pledges, including unpaid pledges.



Request Report

10049 - Dr. Seymour Cassidy

Request Number 1015

Date	10/10/2000	**Recurring**	No
Type	Phonathon		
Status	Active		
Campaign	Annual Campaign 2002	**Next Install Date**	10/10/2000
Appeal	Telemarketing	**Last Reminder Date**	
Fund	Annual Fund	**Requested Amount**	500.00
Distribution	Operating from Annual Fund Mail Campaigns	**Amount Received**	0.00
Solicitor	Mr. Ethan A. Hunter, Jr.	**Number of Reminders**	0
Notes	Agreed to consider an additional gift of $500 by the end of the year.		

Request Number 1094

Date	11/4/2002	**Recurring**	No
Type	Pho		
Status	Active		
Campaign	Annual Campaign 2002	**Next Install Date**	11/4/2002
Appeal	Telemarketing	**Last Reminder Date**	
Fund	Annual Fund	**Requested Amount**	6,000.00
Distribution		**Amount Received**	0.00
Solicitor	Mr. Ethan A. Hunter, Jr.	**Number of Reminders**	0
Notes	Expecting bequest from aunt in next two years		

Total Amount Requested	**6,500.00**	Total Number of Requests	**2**
Total Amount Received	**0.00**	Number of Outstanding Requests	**2**

Request Report

Soft Credit Report (Crystal)

The Soft Credit Report is a transaction-based report that lists all gifts and pledges that have soft credits. The report is grouped by campaign, original transaction, and donor ID.

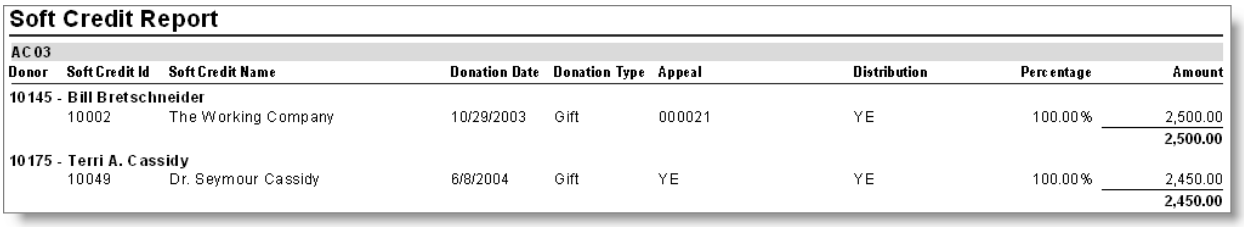
Note: If a donor made multiple contributions to one or more campaigns, the Donor Name may be repeated in the report.

Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Donations include Gifts and Pledges, including unpaid pledges.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.



Soft Credit Report

AC03

Donor	Soft Credit Id	Soft Credit Name	Donation Date	Donation Type	Appeal	Distribution	Percentage	Amount
10145 - Bill Bretschneider								
	10002	The Working Company	10/29/2003	Gift	000021	YE	100.00%	2,500.00
								2,500.00
10175 - Terri A. Cassidy								
	10049	Dr. Seymour Cassidy	6/8/2004	Gift	YE	YE	100.00%	2,450.00
								2,450.00

Soft Credit Report

Solicitor Performance Analysis (Crystal)

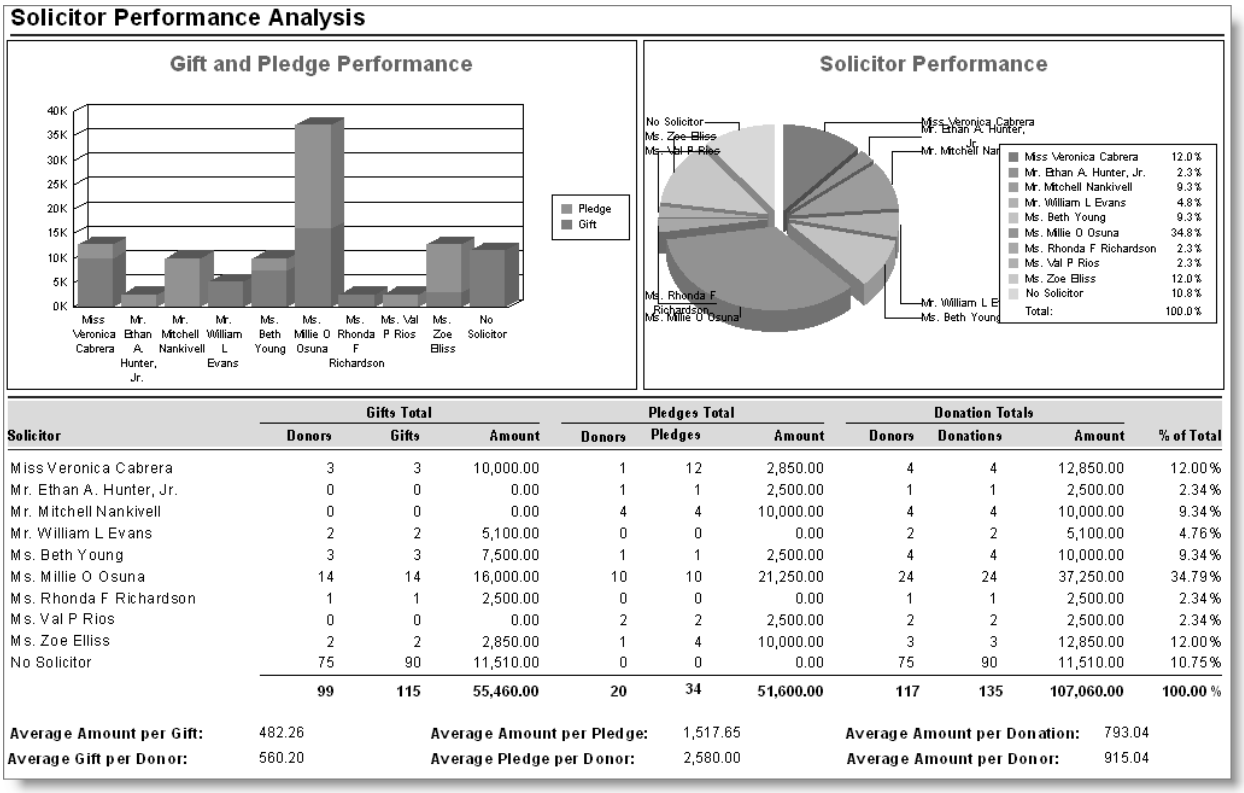
The Solicitor Performance Analysis report summarizes the number of donors and the number and amount of Gifts, Pledges, and Donations credited to each solicitor and also provides the percentage of total donations for which each solicitor is responsible. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Analysis, Fundraising > Executive Window

Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Donations include Gifts and Pledges, including unpaid pledges.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Solicitor	Gifts Total Donors	Gifts	Amount	Pledges Total Donors	Pledges	Amount	Donation Totals Donors	Donations	Amount	% of Total
Miss Veronica Cabrera	3	3	10,000.00	1	12	2,850.00	4	4	12,850.00	12.00%
Mr. Ethan A. Hunter, Jr.	0	0	0.00	1	1	2,500.00	1	1	2,500.00	2.34%
Mr. Mitchell Nankivell	0	0	0.00	4	4	10,000.00	4	4	10,000.00	9.34%
Mr. William L Evans	2	2	5,100.00	0	0	0.00	2	2	5,100.00	4.76%
Ms. Beth Young	3	3	7,500.00	1	1	2,500.00	4	4	10,000.00	9.34%
Ms. Millie O Osuna	14	14	16,000.00	10	10	21,250.00	24	24	37,250.00	34.79%
Ms. Rhonda F Richardson	1	1	2,500.00	0	0	0.00	1	1	2,500.00	2.34%
Ms. Val P Rios	0	0	0.00	2	2	2,500.00	2	2	2,500.00	2.34%
Ms. Zoe Elliss	2	2	2,850.00	1	4	10,000.00	3	3	12,850.00	12.00%
No Solicitor	75	90	11,510.00	0	0	0.00	75	90	11,510.00	10.75%
	99	**115**	**55,460.00**	**20**	**34**	**51,600.00**	**117**	**135**	**107,060.00**	**100.00 %**

Average Amount per Gift:	482.26	**Average Amount per Pledge:**	1,517.65	**Average Amount per Donation:**	793.04
Average Gift per Donor:	560.20	**Average Pledge per Donor:**	2,580.00	**Average Amount per Donor:**	915.04

Solicitor Performance Analysis

Solicitor Profile (Crystal)

The Solicitor Profile report shows solicitor performance summaries by Gift and Pledge, by Campaign, by Fiscal Year, and by Distribution and also lists donation information for Donors associated with the solicitor. The report can be run for one solicitor or for all solicitors.

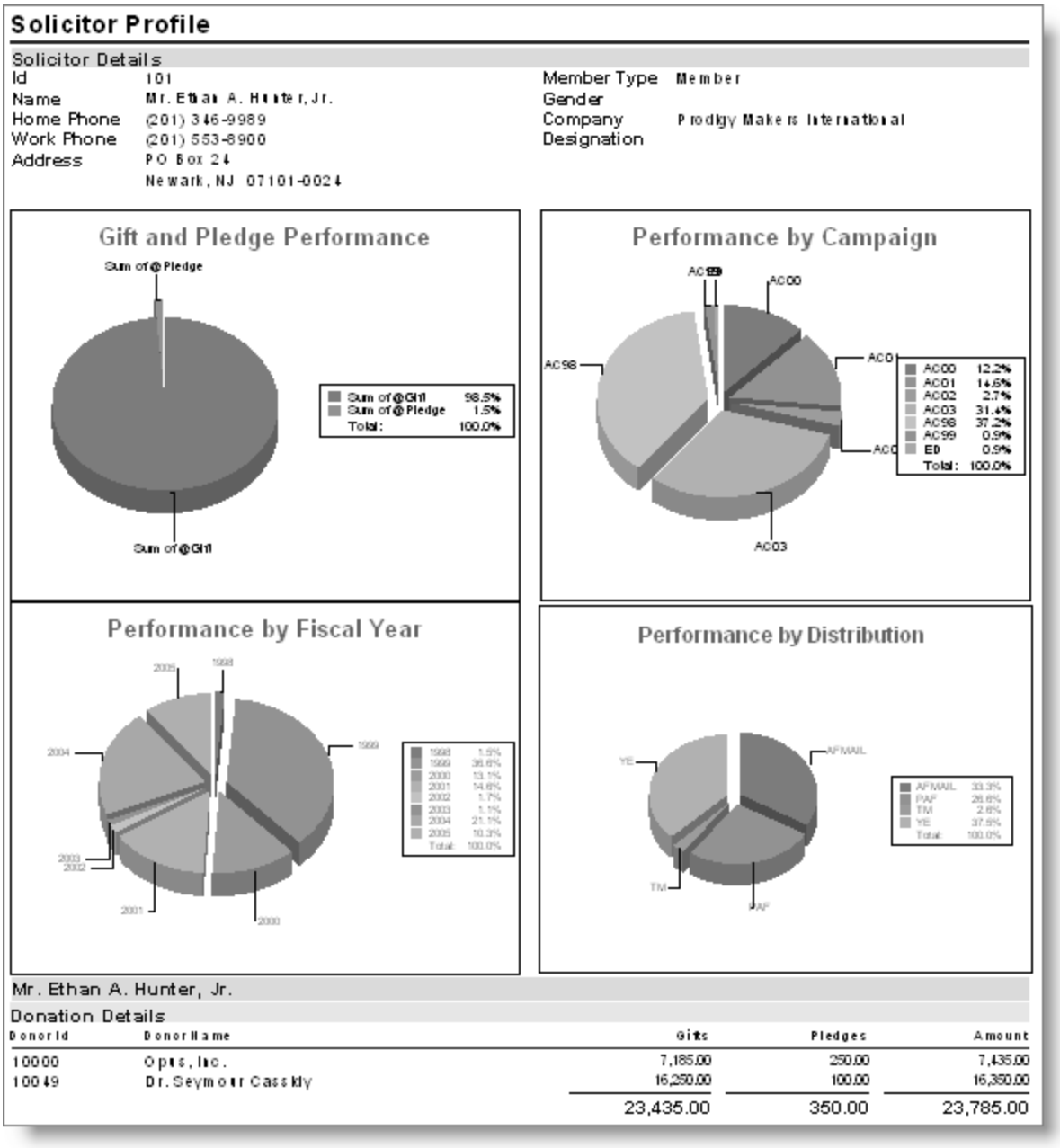
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: In this report, Donations include Fundraising, Events, and Dues donations.

Donations include Gifts and Pledges, including unpaid pledges.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Solicitor Profile

SYBUNT Report (Crystal)

The SYBUNT (some year but unfortunately not this year) report lists past collected funds (either gifts or payments) for all Donors who have contributed in two or more calendar years before the current year but who have not contributed this year or last year.

Note: To see which donors have donated last year but not this year, run the LYBUNT report.

Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

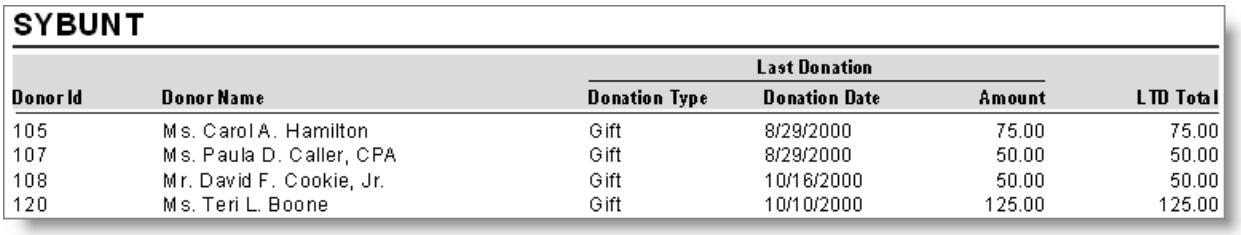
Note:

In this report, Donations include Fundraising, Events, and Dues donations.

This report includes Gifts and Pledge Payments. It does not include pledge income that has not been collected.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

This report includes Gifts and Pledge Payments. It does not include pledge income that has not been collected.



SYBUNT

		Last Donation			
Donor Id	Donor Name	Donation Type	Donation Date	Amount	LTD Total
105	Ms. Carol A. Hamilton	Gift	8/29/2000	75.00	75.00
107	Ms. Paula D. Caller, CPA	Gift	8/29/2000	50.00	50.00
108	Mr. David F. Cookie, Jr.	Gift	10/16/2000	50.00	50.00
120	Ms. Teri L. Boone	Gift	10/10/2000	125.00	125.00

Some Year but Unfortunately Not This Year (SYBUNT)

Yearly Giving Comparison by Calendar Year report

The Yearly Giving Comparison by Calendar Year report compares and summarizes the number and amounts of gifts and pledges from new and established donors for a specified year and the preceding four years. Run this report from:

Admin Console: Continuum > Fundraising Reports > Analysis
Desktop: Fundraising > Analysis

Note: To view fiscal year data, run the Yearly Giving Comparison report.

Yearly Giving Comparison By Calendar Year

	5 Year Totals	2005	2004	2003	2002	2001
New Donor Statistics						
Gift Count	152	85	21	27	14	5
Pledge Count	0	0	0	0	0	0
Gift Amount	437,629.00	9,500.00	27,100.00	109,475.00	214,450.00	77,104.00
Pledge Amount	0.00	0.00	0.00	0.00	0.00	0.00
Average Amount	2,879.14	111.76	1,290.48	4,054.63	15,317.86	15,420.80
Percent of Total	51.14%	97.34%	74.61%	22.02%	98.12%	82.07%
Established Donor Statistics						
Gift Count	81	4	17	20	7	33
Pledge Count	3	0	0	1	0	2
Gift Amount	416,908.00	260.00	9,220.00	387,463.00	4,120.00	15,845.00
Pledge Amount	1,250.00	0.00	0.00	250.00	0.00	1,000.00
Average Amount	4,978.07	65.00	542.35	18,462.52	588.57	481.29
Percent of Total	48.86%	2.66%	25.39%	77.98%	1.88%	17.93%
Total Donor Statistics						
Gift Count	233	89	38	47	21	38
Pledge Count	3	0	0	1	0	2
Gift Amount	854,537.00	9,760.00	36,320.00	496,938.00	218,570.00	92,949.00
Pledge Amount	1,250.00	0.00	0.00	250.00	0.00	1,000.00
Average Amount	3,626.22	109.66	955.79	10,358.08	10,408.10	2,348.73
Percent of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Yearly Giving Comparison by Calendar Year

Reporting performance for large Fundraising data sets

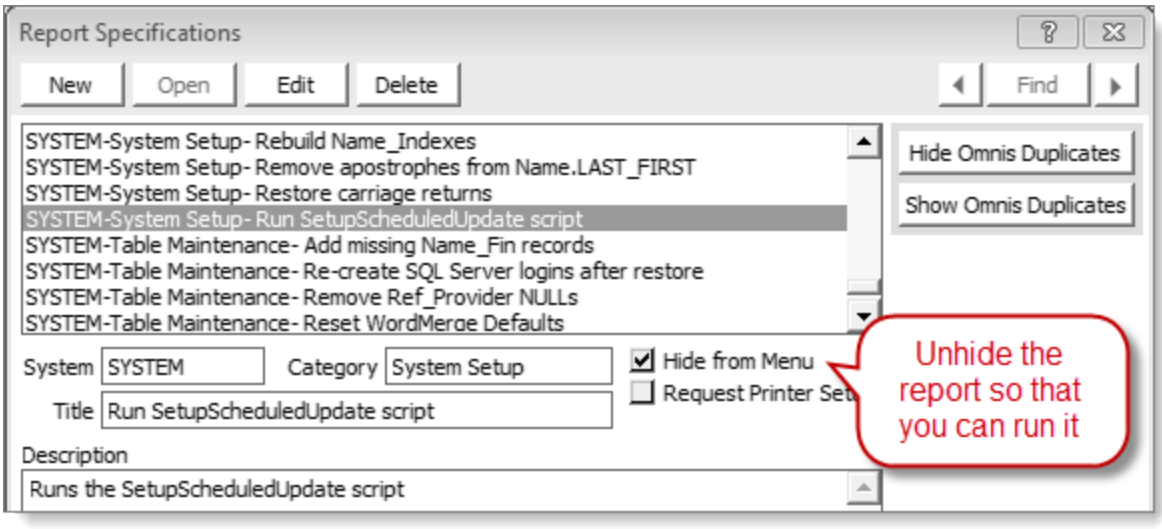
If you have a large amount of Fundraising data, you can enhance the performance of your Fundraising reports by periodically updating the Fundraising report summary tables. These tables act as a cache of pre-calculated data, so that when a report runs, only the data collected since the last time you updated the summary files must be combined, filtered, and calculated.

Note: Do not use these tables to create customizations. Instead, use the views that support Fundraising. These views are optimized each time you run the update procedure.

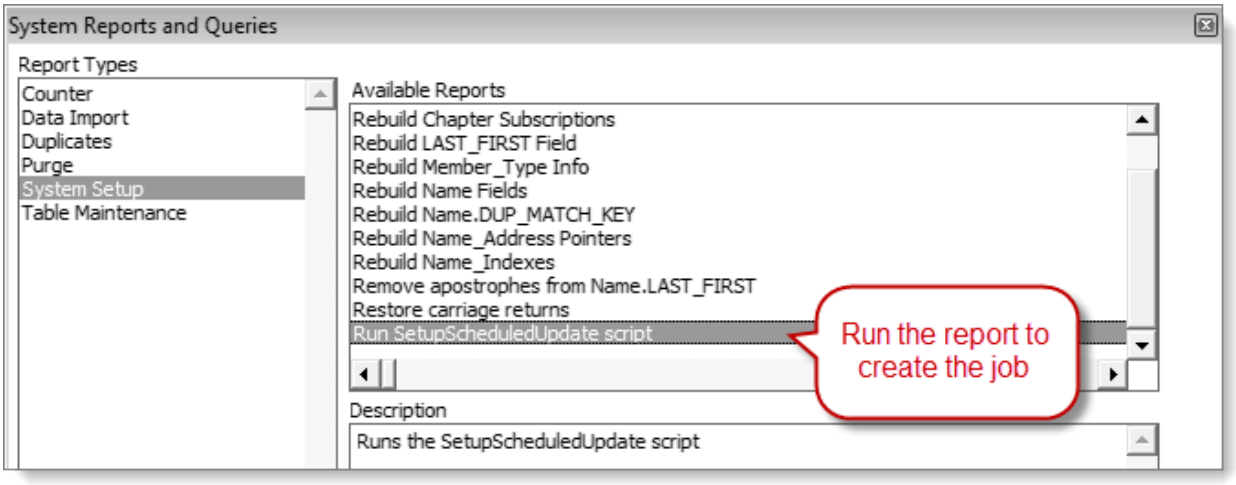
To create the job that updates FR report data

To create the job that updates these fundraising tables, unhide and then run a special report within Desktop. Once the job exists, you can run the update manually as needed.

1. From the Desktop menu, select Utilities > Report Specs.
1. Select the item titled SYSTEM-System Setup-Run SetupScheduledUpdate script.
2. Select Edit, uncheck Hide from Menu, and Save.



3. To run the script, select Utilities > Reports and Queries.
4. From Report Types, select System Setup.
5. From Available Reports, select Run SetupScheduledUpdate script.
6. Click Run.



To automate the job that updates FR report data

In SQL Server Agent, configure the update job to run automatically.

1. Enable the job titled ASI Update Fundraising Views.
2. As needed, change the job's scheduled run time, which defaults to 2:00 AM daily.

Tip: Avoid running updates during hours when iMIS usage is heavy to avoid affecting performance.

3. After you enable the ASI Update Fundraising Views job, configure SQL Server Agent to start whenever the operating system restarts.

Hands-on exercise: Generate reports

1. From Fundraising, select Generate reports to open the Generate reports window.
2. Export a report in Microsoft Word for all gifts made during August 2009:

- Report Types: Export
- Available Reports: All Gifts to Microsoft Word

1. Click Run to display the Select Date Range window.
2. Enter 08/01/2009 in the Begin Date field.
3. Enter 08/31/2009 in the End Date field.
4. Click OK to display the Set print file name window.
5. Browse to the desired folder for the file.
6. Enter August 2009 in the File name: field.
7. Click Save.

3. Issue a reminder for installments due during August 2009:

- Report Types: Issue
- Available Reports: Reminder for Installments Due

1. Click Run to display the Select Date Range window.
2. Enter 08/01/2009 in the Begin Date field.
3. Enter 08/31/2009 in the End Date field.

4. Click OK. The Set report destination window opens.
5. Select Screen and click OK.

4. Generate a summary of all gifts made during August 2009, sorted by campaign:

- Report Types: Reports
- Available Reports: Giving Summary

1. Click Run to display the Reports window.
2. Enter ANNUAL in the Campaign field.
3. Enter 08/01/2009 in the Date field.
4. Enter 08/31/2009 in the Thru field.
5. Click Run.

5. Generate a detailed list of all pledges made to the General (GEN) fund from August 1, 2009 through November 1, 2009, sorted by customer ID:

- Report Types: Reports
- Available Reports: Pledge Summary

1. Click Run to display the Reports window.
2. Select Member Number from the Sort & Summarize by scrolling list.
3. Delete ANNUAL from the Campaign field (if still displayed from the last report run).
4. Enter GEN in the Fund field.
5. Enter 08/01/2009 in the Date field.
6. Enter 11/01/2009 in the Thru field.
7. Click Run.

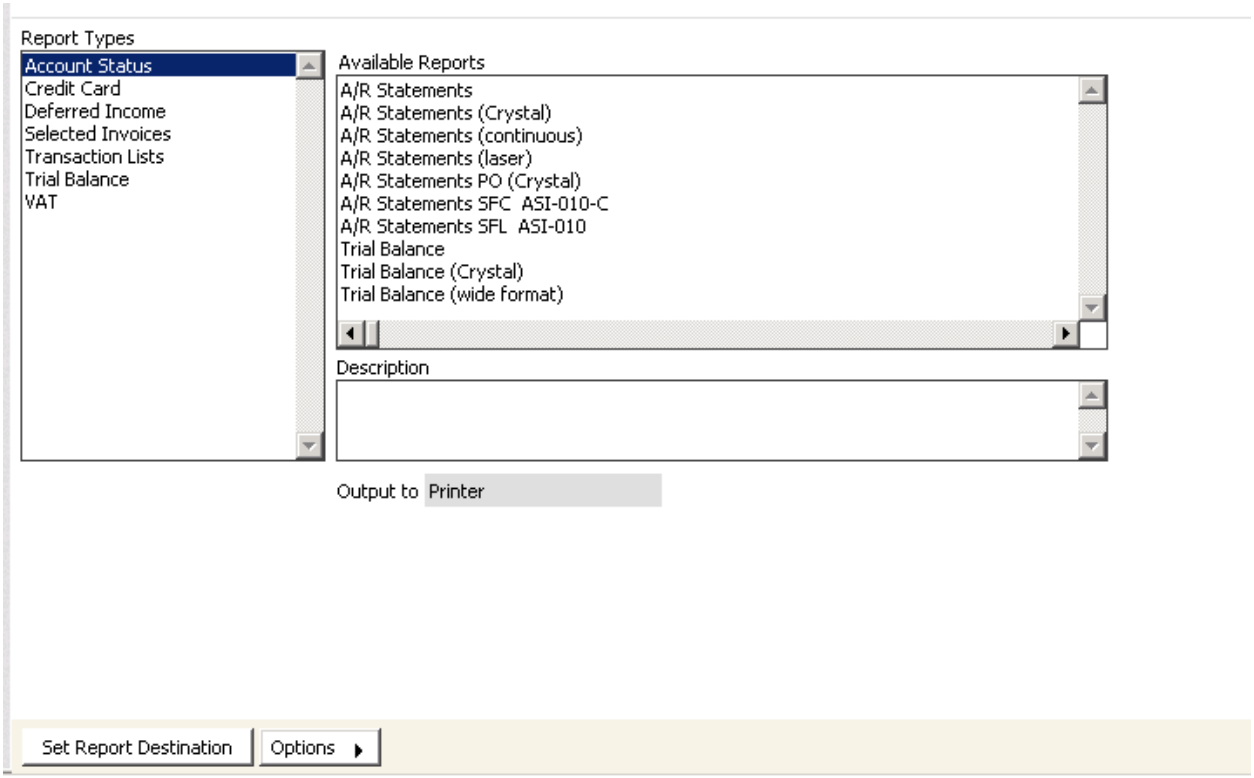
Hands-on exercise: Generate reports from the Generate executive reports window

1. From Fundraising, select Generate executive reports to open the Generate executive reports window.
2. Click New.
3. Select Pledge from the Choose a Report.. scrolling list.
4. In the Comparison to Previous Period area, enter 08/01/2009 in the From field and 11/01/2009 in the Thru field.
5. Click Run.

Commerce and Customer Service Reports

Accounting Reports

Accounting reports window



Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports
Desktop: AR/Cash > Generate reports

The following reports are the most frequently used in Accounting, and are often used on a daily basis:

- On-screen account inquires
- Accounting Transaction reports
- Accounting Transaction journal
- Accounting Statements reports
- Trial Balance reports
- Deferred Income reports
- Selected Invoices reports
- Credit/Debit Card Authorization reports

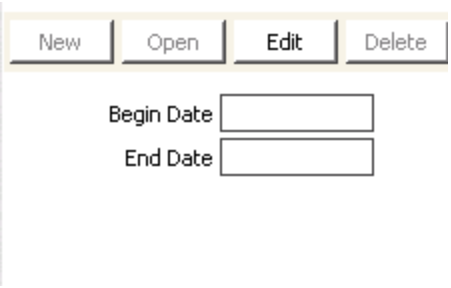
To view on-screen account inquiries

Perhaps the most important inquiry tool you will use is located in the customer's record. For example, if a customer asks for instant information on the status of an account item, you can immediately open screens that show overall and detailed data on open items.

1. From Accounting reports, find a customer's record.
2. The name and address data for the selected customer displays on the Manage customers window.
3. Select the AR/Cash tab.
4. Double-click on a line item to display the transaction details on the Transaction Ledger window.
5. Click OK.

6. Click Print Trial Balance on the AR/Cash tab. The system automatically generates a Trial Balance report for the specified customer ID.

Print transaction journal window



Admin Console: Accounting > Processes > Print transaction journal
Desktop: AR/Cash > Print Transaction Journal

The Print Transaction Journal window includes the following fields:

Begin Date

Enter the beginning date for the AR transactions to be printed.

End Date

Enter the ending date for the AR transactions to be printed.

Print button

Click to print the AR transactions for the specified date range.

After specifying a date range and clicking Print, the Transaction Recap, Debit Memo Journal, Revenue-Sales Journal, and Payments Journal reports are printed.

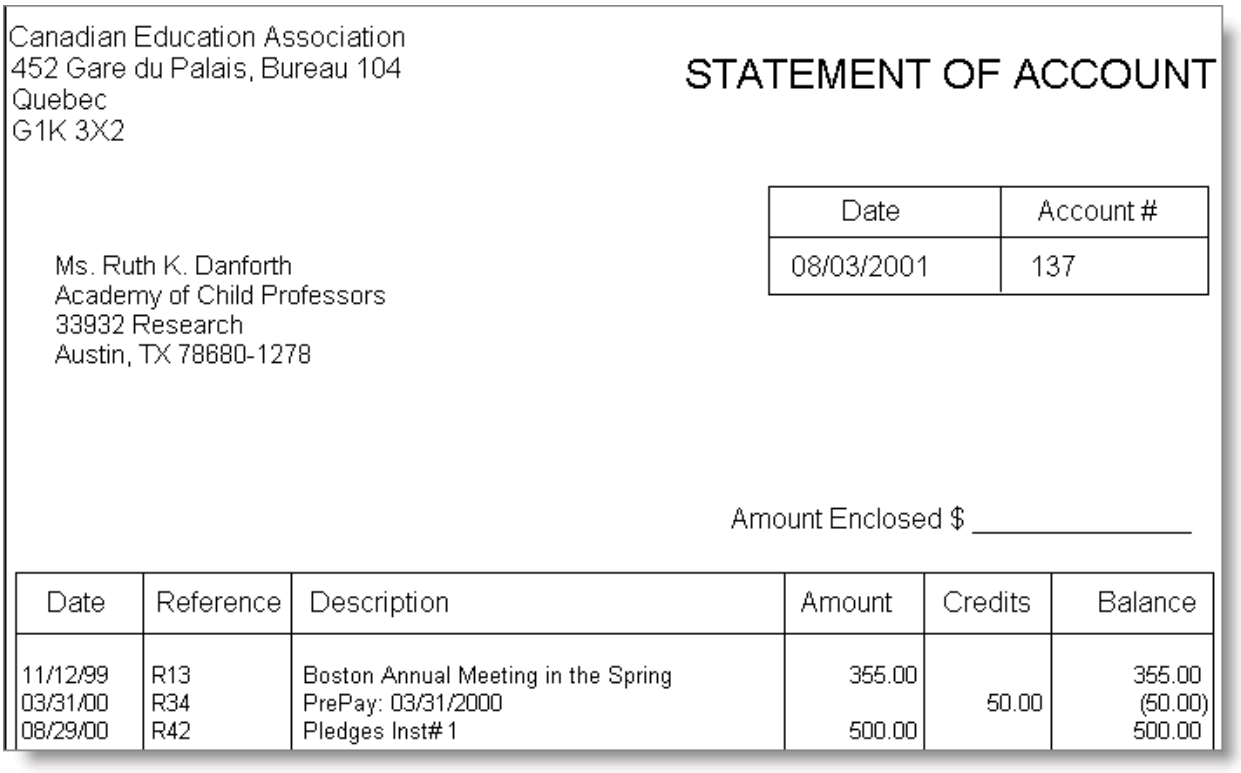
Sample Accounting Reports

Account Status - AR Statements report

The AR Statements report produces a Statement of Account for any customer that has an outstanding balance. The search features on the A/R Statements dialog window determine the range of information printed on the report.

The statements print on plain paper designed for laser printers. The statements list all open items in the body and provide an aged summary at the bottom of the report.

Depending on the age of an open account, you have the option of a pre-configured message at the bottom of the report that lines up with text entered on the AR/Cash Set up module window (from AR/Cash, select Set up module). The AR Statements reports are primarily used for sending reminders out to customers who are overdue in paying one or more invoices.



Canadian Education Association
452 Gare du Palais, Bureau 104
Quebec
G1K 3X2

STATEMENT OF ACCOUNT

Date	Account #
08/03/2001	137

Ms. Ruth K. Danforth
Academy of Child Professors
33932 Research
Austin, TX 78680-1278

Amount Enclosed $ _____

Date	Reference	Description	Amount	Credits	Balance
11/12/99	R13	Boston Annual Meeting in the Spring	355.00		355.00
03/31/00	R34	PrePay: 03/31/2000		50.00	(50.00)
08/29/00	R42	Pledges Inst# 1	500.00		500.00

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > A/R Statements (Crystal)

Desktop: AR/Cash > Generate reports > Account Status > A/R Statements (Crystal)

Account Status - Selected Invoices report

Invoice reports are frequently used to verify the accuracy of a billing run and to see which customers or subscribers have not paid.

The invoice printing process prints the invoice and generates the related accounting transactions to record the sales. Because orders cannot be modified after they are invoiced, the printing process represents the final step in the order processing cycle.

Selected Invoices
as of May 31st, 2002

Page 1

Advanced Solutions International, Inc.

Date / Id	Invoice/Ref	System/Type / Company/Name	Description / Member Type	Charges	Credits	Balance
09/21/1999 166	R28	EXPO International Medico	Medical Exposition 2000 CM	4,050.00	1,012.50	3,037.50
09/21/1999 101	R29	EXPO Prodigy Makers International	Medical Exposition 2000 CM	4,050.00	1,012.50	3,037.50
09/21/1999 180	R30	EXPO Brown & Brown	Medical Exposition 2000 CM	4,025.00	1,006.25	3,018.75
11/12/1999 156	R10	MEETING Mr. Peter L. Bachman, American Business Services	Boston Annual Meeting in the Spring M	210.00	210.00	0.00
11/12/1999 121	R11	MEETING Spybreakers Ltd.	Boston Annual Meeting in the Spring CM	250.00	250.00	0.00
11/12/1999 155	R12	MEETING American Business Services	Technology Expo CM	170.00	170.00	0.00

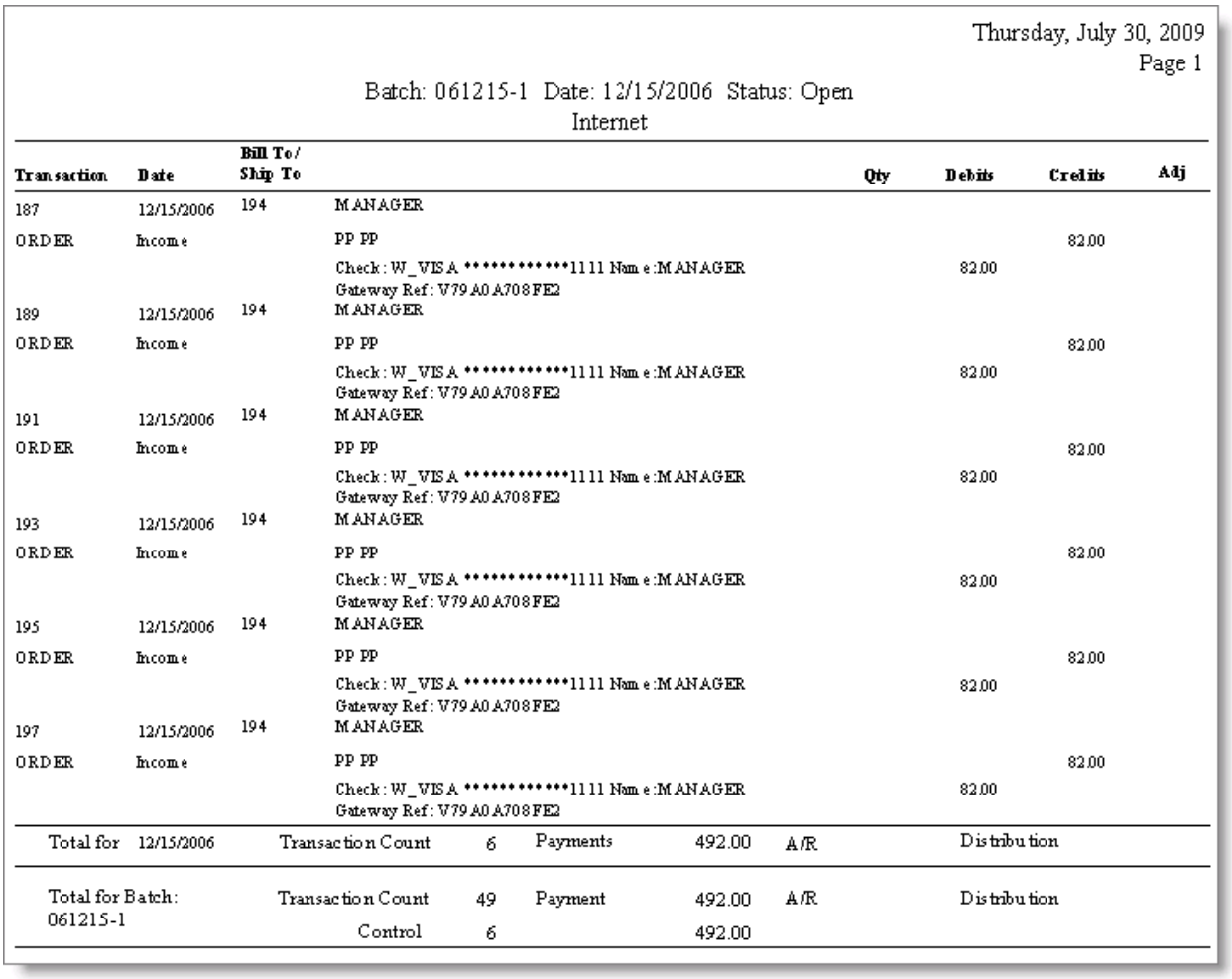
Admin Console: Continuum > Commerce and Customer Service Reports > Accounting Reports > Selected Invoices
Desktop: AR/Cash > Generate reports > Selected Invoices

BatchControlPrint - Batch Report

The Batch report shows a list of all European debit card transactions for the selected date range. Run this report from:

Admin Console: Accounting > Processes > Manage batches: select a batch and Print
Desktop: AR/Cash > Manage Batches: select a batch and Print

Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Thursday, July 30, 2009
Page 1

Batch: 061215-1 Date: 12/15/2006 Status: Open
Internet

Transaction	Date	Bill To/ Ship To		Qty	Debits	Credits	Adj
187	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
189	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
191	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
193	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
195	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
197	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		

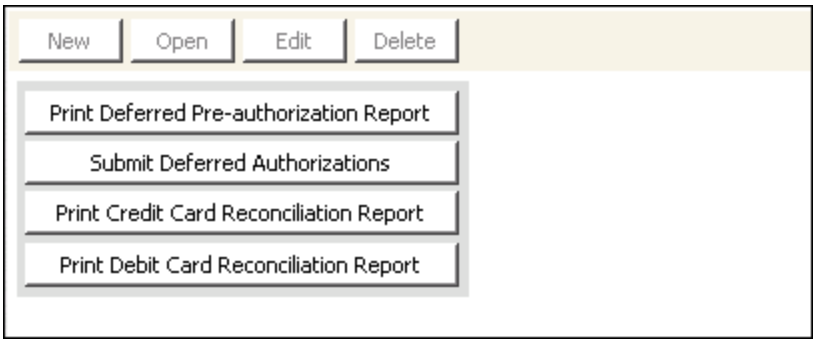
Total for	12/15/2006	Transaction Count	6	Payments	492.00	A/R	Distribution
Total for Batch: 061215-1		Transaction Count	49	Payment	492.00	A/R	Distribution
		Control	6		492.00		

Batch Report

Credit card reports

Credit card authorization window

Note: If you have not set up credit card cash accounts in the AR/Cash module, the Credit card reporting menu item is disabled.



The following report options display on the Credit card authorization window:

- Print Deferred Pre-authorization Report – Prints a report of deferred credit/debit card transactions. The report parameters include Date Range and Org Code.
- Submit Deferred Authorizations – Sends transactions flagged for deferred authorization. All flagged transactions are submitted immediately. This applies only to deferred credit/debit card authorizations.
- Print Credit Card Reconciliation Report – Prints a credit card reconciliation report.
- Print Debit Card Reconciliation Report – Prints a European debit card reconciliation report.

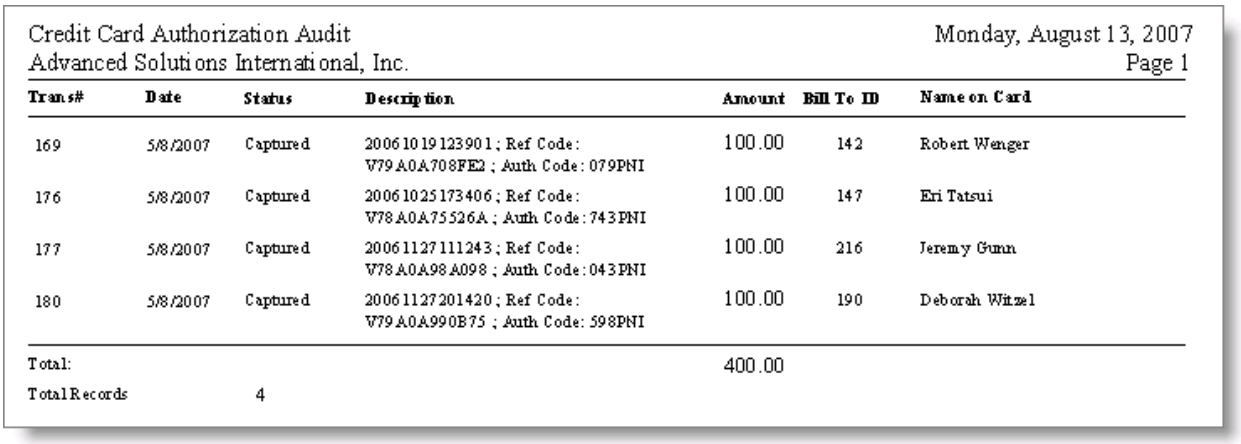
  Note: If you have not set up European debit card cash accounts in the AR/Cash module, the Print Debit Card Reconciliation Report button is not available.

Credit Card Authorization Audit report

This report prints a list of all credit card transactions that were authorized within the given date range and/or Org Code. You can use this report to compare with the results of queries you receive from your gateway provider. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > Credit Card > Credit Card Authorization Audit (Crystal)
Desktop: AR > Generate Reports > Credit Card > Credit Card Authorization Audit (Crystal)

Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Credit Card Authorization Audit
Advanced Solutions International, Inc.

Monday, August 13, 2007
Page 1

Trans#	Date	Status	Description	Amount	Bill To ID	Name on Card
169	5/8/2007	Captured	20061019123901; Ref Code: V79A0A708FE2; Auth Code: 079PNI	100.00	142	Robert Wenger
176	5/8/2007	Captured	20061025173406; Ref Code: V78A0A75526A; Auth Code: 743PNI	100.00	147	Eri Tatsui
177	5/8/2007	Captured	20061127111243; Ref Code: V78A0A98A098; Auth Code: 043PNI	100.00	216	Jeremy Gunn
180	5/8/2007	Captured	20061127201420; Ref Code: V79A0A990B75; Auth Code: 598PNI	100.00	190	Deborah Witzel
Total:				400.00		
Total Records		4				

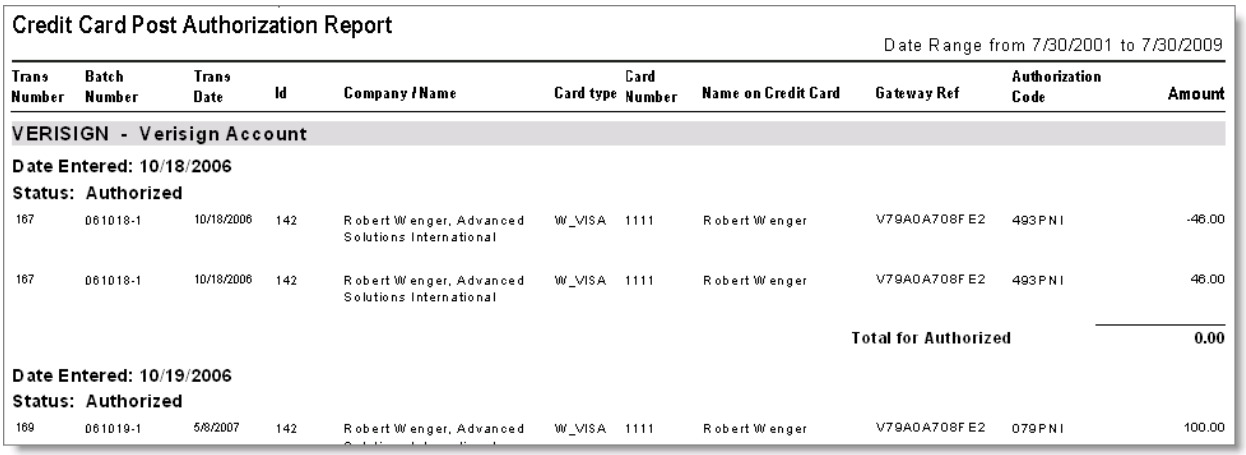
Credit Card Authorization Audit report

Credit Card - Credit Card Post Authorization report

The Credit Card Post Authorization report shows a list of all credit card transactions for the selected date range. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting Reports > Credit Card > Credit Card Post Authorization Report (Crystal)
Desktop: AR/Cash > Generate Reports > Credit Card

Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Credit Card Post Authorization Report

Date Range from 7/30/2001 to 7/30/2009

Trans Number	Batch Number	Trans Date	Id	Company / Name	Card type	Card Number	Name on Credit Card	Gateway Ref	Authorization Code	Amount
VERISIGN - Verisign Account										
Date Entered: 10/18/2006										
Status: Authorized										
167	061018-1	10/18/2006	142	Robert Wenger, Advanced Solutions International	W_VISA	1111	Robert Wenger	V79A0A708FE2	493PNI	-46.00
167	061018-1	10/18/2006	142	Robert Wenger, Advanced Solutions International	W_VISA	1111	Robert Wenger	V79A0A708FE2	493PNI	46.00
								Total for Authorized		0.00
Date Entered: 10/19/2006										
Status: Authorized										
169	061019-1	5/8/2007	142	Robert Wenger, Advanced	W_VISA	1111	Robert Wenger	V79A0A708FE2	079PNI	100.00

Credit Card Post Authorization Report

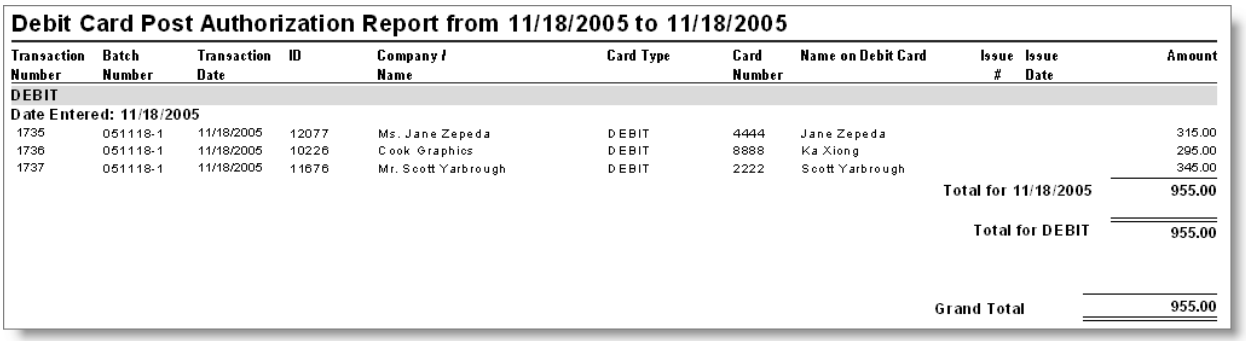
Credit Card - Debit Card Post Authorization report

The Debit Card Post Authorization report shows a list of all European debit card transactions for the selected date range. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > Credit Card > Debit Card Post Authorization Report (Crystal)

Desktop: AR/Cash > Generate Reports > Credit Card

Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Debit Card Post Authorization Report from 11/18/2005 to 11/18/2005

Transaction Number	Batch Number	Transaction Date	ID	Company / Name	Card Type	Card Number	Name on Debit Card	Issue #	Issue Date	Amount
DEBIT										
Date Entered: 11/18/2005										
1735	051118-1	11/18/2005	12077	Ms. Jane Zepeda	DEBIT	4444	Jane Zepeda			315.00
1736	051118-1	11/18/2005	10226	Cook Graphics	DEBIT	8888	Ka Xiong			295.00
1737	051118-1	11/18/2005	11676	Mr. Scott Yarbrough	DEBIT	2222	Scott Yarbrough			345.00
									Total for 11/18/2005	955.00
									Total for DEBIT	955.00
									Grand Total	955.00

Debit Card Post Authorization Report

Debit Reconciliation - Debit Card Reconciliation report

The Debit Card Reconciliation report shows a list of all European debit card transactions for the selected time frame, sorted by batch and transaction number. Run this report from:

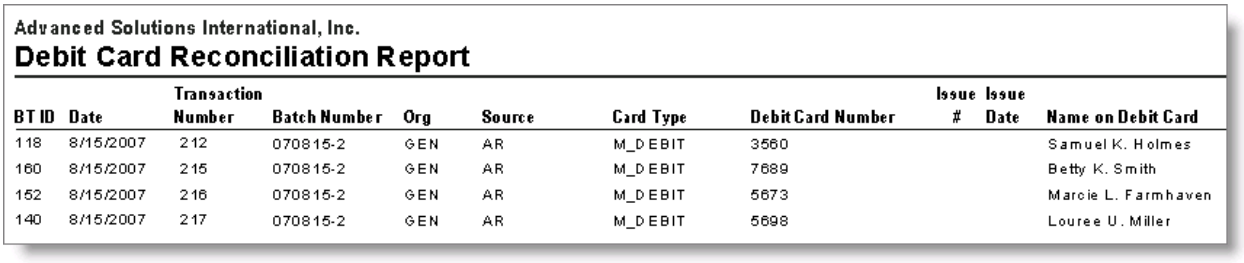
Admin Console: Continuum > Commerce and Customer Service Reports > Credit card reports > Print Debit Card Reconciliation Report

Desktop: AR/Cash > Credit Card Reporting > Credit Card Reports > Print Debit Card Reconciliation Report

Troubleshooting

- The Print Debit Card Reconciliation Report button is only available if you have defined a credit card authorization gateway and a cash account for debit cards.
- To return results, you need to select a batch with at least one debit card transaction. Otherwise, the report is empty.

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Advanced Solutions International, Inc.

Debit Card Reconciliation Report

BT ID	Date	Transaction Number	Batch Number	Org	Source	Card Type	Debit Card Number	Issue #	Issue Date	Name on Debit Card
118	8/15/2007	212	070815-2	GEN	AR	M_DEBIT	3560			Samuel K. Holmes
160	8/15/2007	215	070815-2	GEN	AR	M_DEBIT	7689			Betty K. Smith
152	8/15/2007	216	070815-2	GEN	AR	M_DEBIT	5673			Marcie L. Farmhaven
140	8/15/2007	217	070815-2	GEN	AR	M_DEBIT	5698			Louree U. Miller

Debit Card Reconciliation report

Deferred income reports

Several summary and detail level reports let you review the status of deferred income. Go to AR/Cash > Generate reports > Deferred Income:

- Deferred Income Analysis/Spread
- Deferred Income Audit Trail (Crystal)

- Deferred Income Detail (Crystal)
- Deferred Income Matrix Summary (Crystal)

  Provides a projection of how the current balances in deferred income will be recognized in each future period. This is an important management report.

  Deferred Income Audit Trail (Crystal)

  Provides a report on the income that was recognized, as well as the deferred income balance that remains at the end of the reporting period. This report is designed to run for a specific monthly period (any month for which the GL interface has already been run). The report is designed as an audit trail report to simulate the income that was recognized, as well as the deferred income balances that remain at the end of the reporting period.

  Note: This report is generated using the specified End Date. Only transactions equal to or less than the report's End Date are included. It is important to always enter the last day of the month.

  This report is based on deferred income transactions for which the deferral/recognition timeframe is still in effect as of the beginning of the month being reported on (residual income is yet to be recognized either during the report month and/or in a future month).

  This report simulates the process that iMIS uses to generate the deferral to income transfer entries with one exception. It depicts the income recognition at the individual detail transaction level, as opposed to the matrix summary level that iMIS uses to generate the actual entries. As a result, the reported income amounts will most likely be different from the actual amounts by small rounding differences. Nonetheless, the report should give a close approximation of the actual transfer amounts per month as well as the residual balance at the end.

  This report is structured as follows:

- The report is based on all transactions dated on or before the reporting end date that have been posted to the deferred income matrix.

- The transactions are grouped, sorted, and subtotaled by the four key deferral matrix elements (deferral account, income account, begin date, and term).
- For identification and cross reference, the Trans #, Trans Date, Bill To ID, Bill To Name, and Product code are listed.
- The transaction amount is listed and subtotaled at the matrix summary level. This subtotal should agree with the original amount on the Deferred Income Matrix Summary report as of the end date of the report (the sign is shown as positive instead of the normal credit balance for easier use of the report).
- For each detail line, the monthly transfer column will show the portion of the income that should have been transferred during the reporting month. In most cases, if the begin date is equal to or less than the reporting period, this will be the transaction amount divided by the term, with appropriate rounding. In some cases, the amount may be more if the transaction date falls within the reporting date and the deferral begin date was within an earlier period. In this case, iMIS works in a catch-up mode on income that needs to be recognized by the reporting date. If the reporting period is the last period within the deferral term, the amount may be smaller or larger to account for any cumulative rounding differential. The transfer amount is summarized at the matrix level and is also subtotaled for each income account. The actual transfer amount can be compared to the total income from transfer for the reporting period.

  Note: If the actual transfer amount differs substantially from the report amount, this may be due to timing issues where the income for certain transactions was not recognized because a future month's GL interface was processed before the affected transactions were processed through an interface cycle.
- The Months Remaining in the deferral term beyond the reporting month is shown for each transaction.
- The deferred income Amount Remaining is shown at the individual transaction level, matrix summary level, and the Total amount by the deferred GL account. It can be compared to the GL balance and/or the Deferred Income Matrix Summary report as of the end of the

reporting month. Again, due to the detail basis of the report, this balance will only be an approximation, which may be off by a rounding difference.

Deferred Income Detail (Crystal)

Provides a report of transactions to be posted to deferred income. Transactions are sorted by deferred income account, regular income account, beginning date, and term. This report should be printed prior to running the GL interface procedure. Verify the accuracy of the data and make modifications as needed before running the GL interface.

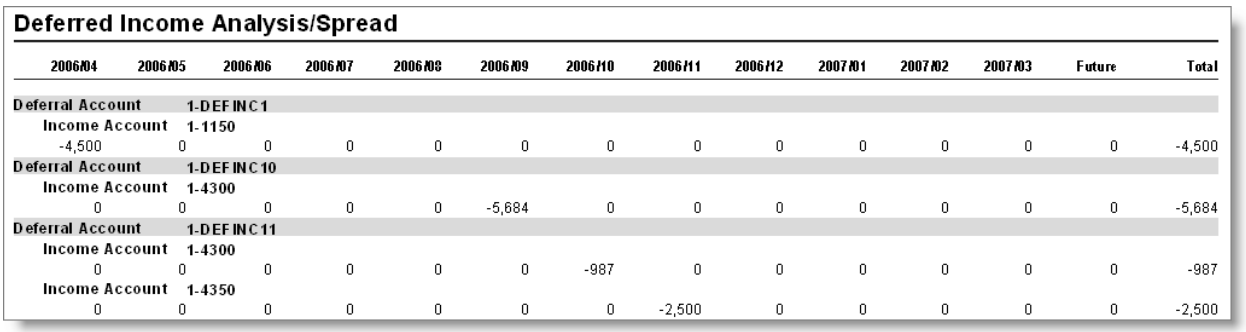
Deferred Income Matrix Summary (Crystal)

Provides a current status of the deferred income matrix table and shows the totals that were originally posted to deferred income, how much has been recognized to date, and the amount that remains to be recognized in future months. This report should be printed after each GL interface. The remaining amounts should tie to the deferred income balances in the General Ledger. Save this report and use it as a backup for deferred income transfer entries.

Deferred Income - Deferred Income Analysis/Spread report (Crystal)

The Deferred Income Analysis/Spread report (Crystal) provides a projection, sorted by deferral account, of how the current balances in deferred income will be recognized over the next twelve months. It also summarizes all amounts projected beyond one year in the Future column, and shows the total of all deferred amounts in the Total column.

Note: The total deferred amount equals Original Amount - Amount Transferred - Amount already realized.



Deferred Income Analysis/Spread

2006/04	2006/05	2006/06	2006/07	2006/08	2006/09	2006/10	2006/11	2006/12	2007/01	2007/02	2007/03	Future	Total
Deferral Account	**1-DEFINC1**												
Income Account	**1-1150**												
-4,500	0	0	0	0	0	0	0	0	0	0	0	0	-4,500
Deferral Account	**1-DEFINC10**												
Income Account	**1-4300**												
0	0	0	0	0	-5,684	0	0	0	0	0	0	0	-5,684
Deferral Account	**1-DEFINC11**												
Income Account	**1-4300**												
0	0	0	0	0	0	-987	0	0	0	0	0	0	-987
Income Account	**1-4350**												
0	0	0	0	0	0	0	-2,500	0	0	0	0	0	-2,500

Deferred Income Analysis/Spread

The report is sorted by the deferral account, and then by the income account. The report ends with the grand totals of each column's entries. Run this report from:

Admin Console: Accounting > Commerce and Customer Service Reports > Accounting reports > Deferred Income
Desktop: AR/Cash > Generate reports > Deferred income

Deferred Income Analysis/Spread

2006/04	2006/05	2006/06	2006/07	2006/08	2006/09	2006/10	2006/11	2006/12	2007/01	2007/02	2007/03	Future	Total
Income Account 1-NONTXFUNC													
0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferral Account 1-TXBLFUNC_DEF													
Income Account 1-TXBL_FUNC													
0	0	0	0	0	0	0	0	0	0	0	0	0	0
Grand totals:													
-10,700	-20,200	-2,300	-6,987	-5,823	-5,684	-987	-2,500	-3,300	0	0	0	0	-58,481

Deferred Income Analysis/Spread totals

MenuTransJournal - AR/Cash Transactions report

The AR/Cash Transactions report runs the following reports:

- Credit Memo Journal – This report groups together adjusting transactions that typically reduce or reverse income, such as credit memo transactions entered in AR/Cash, Billing (from adjusting accrual dues invoices), Fundraising, and Order Entry (from invoicing Credit Memo type orders).
- Debit Memo Journal – This report groups together adjusting transactions that typically increase income, such as debit memo/adjustment transactions entered in AR/Cash, Billing (from adjusting accrual dues invoices), Fundraising, and Order Entry (from invoicing debit memo type orders).
- Payments Journal – This report focuses primarily on cash receipt transactions, such as those entered in the (AR/Cash) Enter and edit cash receipts, (Billing) Enter and edit payments, (Fundraising) Process payments, and (Service Central) Enter and edit payments windows.
- Refund Journal – This reported provides information on transactions generated as a result of refunds issued from AR/Cash (from AR/Cash, select Process month-end procedures, click Credit Invoices, select one or more credit invoices, and click Issue Refunds).

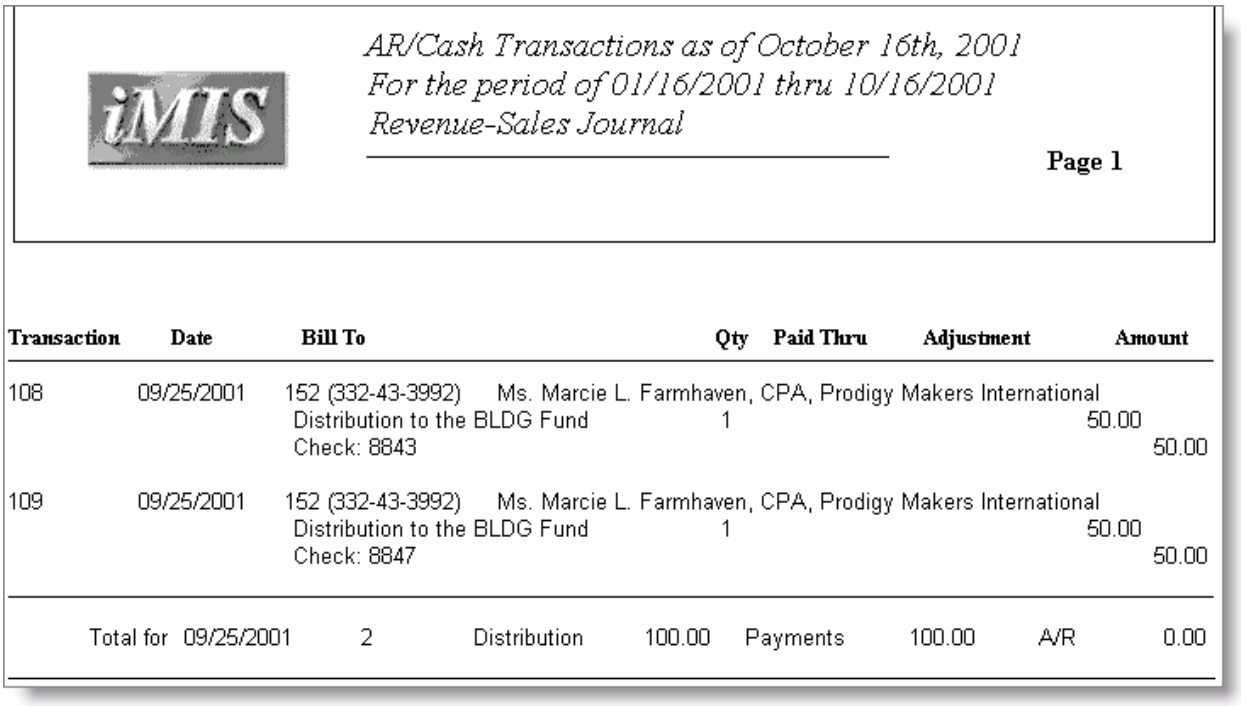
- Revenue-Sales Journal – This report provides a detailed audit trail of all AR/Cash transactions entered through AR/Cash.
- Transaction Recap – This report provides an accounting summary showing the net effect of the transactions.

  These documents do not include transactions generated through other modules, such as Events.

  Note: If you have batch control enabled (from AR/Cash, select Set up module, and click Batch Control) print your transaction journal from the Manage batches window (from AR/Cash, select Manage batches). You can also select batch-specific printing options on the Manage batches window.

  The detail journal separates transactions by type. Transactions entered on the Enter and edit sales transactions window (from AR/Cash, select Enter and edit transactions> Sales transactions) print with summary totals followed by a page break before printing transactions entered on the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions> Cash receipts).

  Note: Remember to select the output destination (printer, screen, file, and so on) before you generate this journal.



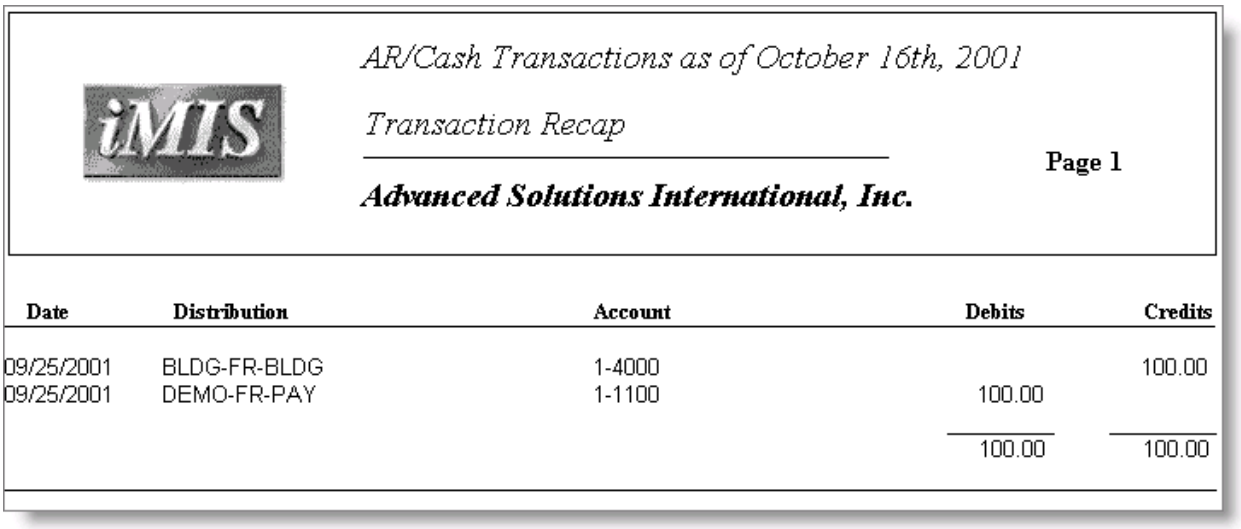
AR/Cash Transactions as of October 16th, 2001
For the period of 01/16/2001 thru 10/16/2001
Revenue-Sales Journal

Page 1

Transaction	Date	Bill To	Qty	Paid Thru	Adjustment	Amount
108	09/25/2001	152 (332-43-3992) Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International				
		Distribution to the BLDG Fund	1			50.00
		Check: 8843				50.00
109	09/25/2001	152 (332-43-3992) Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International				
		Distribution to the BLDG Fund	1			50.00
		Check: 8847				50.00

Total for 09/25/2001	2	Distribution	100.00	Payments	100.00	A/R	0.00

The Transaction Journal - Revenue Sales-Journal



AR/Cash Transactions as of October 16th, 2001

Transaction Recap

Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
09/25/2001	BLDG-FR-BLDG	1-4000		100.00
09/25/2001	DEMO-FR-PAY	1-1100	100.00	
			100.00	100.00

The Transaction Journal - Transaction Recap

Note: The AR Cash Transactions (Crystal) report prints as two different pages on the same report. Use the scroll feature on the Print window to view Transaction Recap.

Reconciliation - Credit Card Reconciliation report

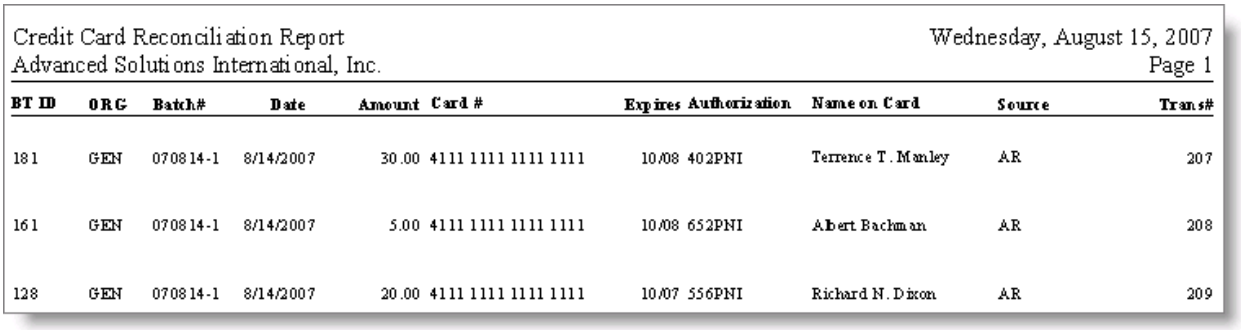
The Credit Card Reconciliation report shows a list of all credit card transactions for the selected batch, sorted by BT ID and Org code. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Credit card reports > Print Credit Card Reconciliation Report
Desktop: AR/Cash > Credit Card Reporting > Credit Card Reports > Print Credit Card Reconciliation Report.

Troubleshooting

- The Print Credit Card Reconciliation Report button is only available if you have defined a credit card authorization gateway and a cash account for credit cards.
- To return results, you need to select a batch with at least one credit card transaction. Otherwise, the report is empty.

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



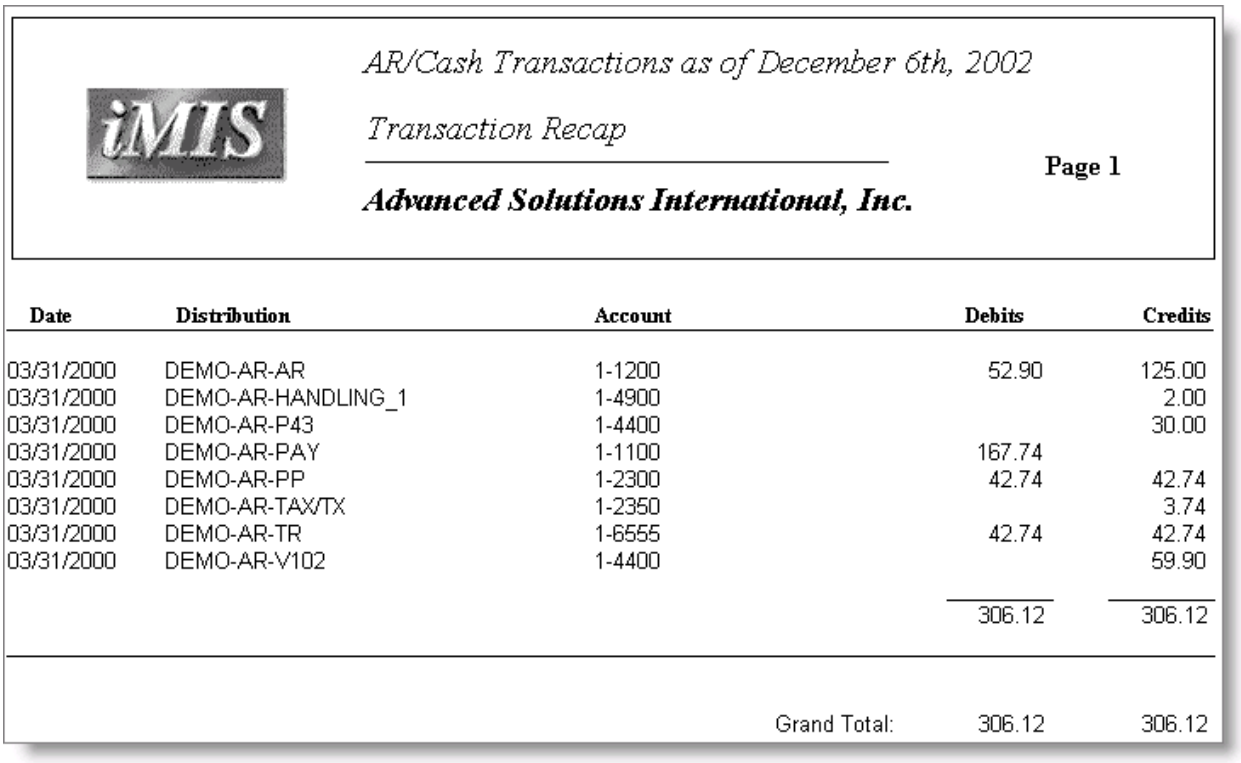
Credit Card Reconciliation Report
Advanced Solutions International, Inc.
Wednesday, August 15, 2007
Page 1

BT ID	ORG	Batch#	Date	Amount	Card #	Expires	Authorization	Name on Card	Source	Trans#
181	GEN	070814-1	8/14/2007	30.00	4111 1111 1111 1111	10/08	402PNI	Terrence T. Manley	AR	207
161	GEN	070814-1	8/14/2007	5.00	4111 1111 1111 1111	10/08	652PNI	Albert Bachman	AR	208
128	GEN	070814-1	8/14/2007	20.00	4111 1111 1111 1111	10/07	556PNI	Richard N. Dixon	AR	209

Credit Card Reconciliation Report

Transaction Journal report

The AR/Cash task list includes the Print Transaction Journal task list item, which allows you to specify a date range and print all AR transactions.



AR/Cash Transactions as of December 6th, 2002

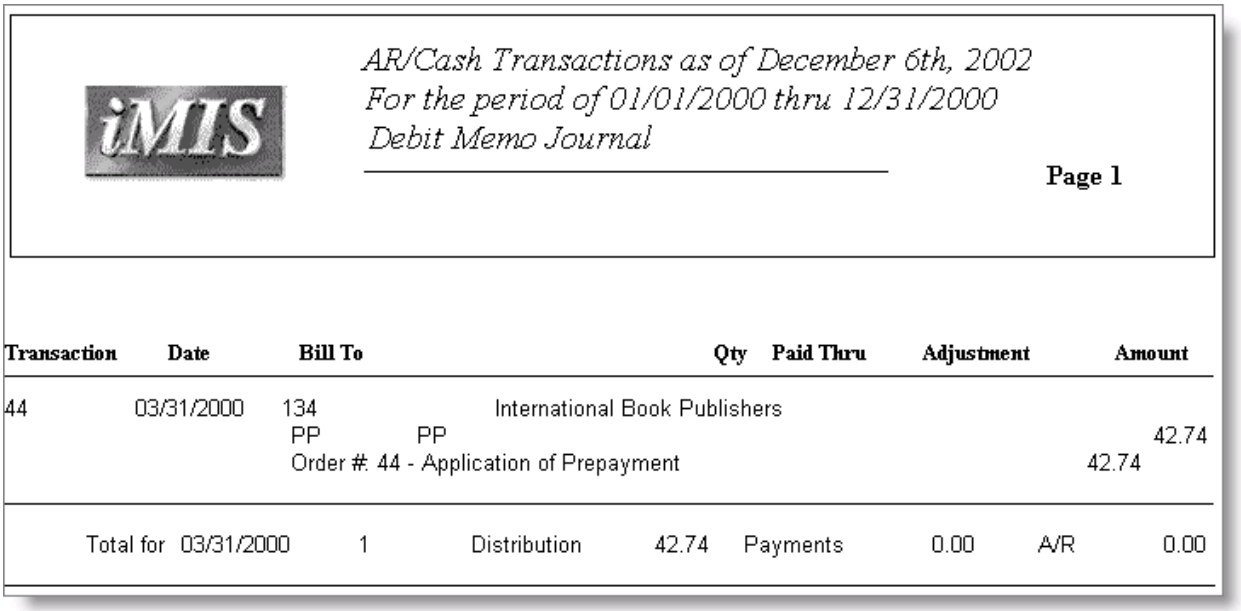
Transaction Recap

Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
03/31/2000	DEMO-AR-AR	1-1200	52.90	125.00
03/31/2000	DEMO-AR-HANDLING_1	1-4900		2.00
03/31/2000	DEMO-AR-P43	1-4400		30.00
03/31/2000	DEMO-AR-PAY	1-1100	167.74	
03/31/2000	DEMO-AR-PP	1-2300	42.74	42.74
03/31/2000	DEMO-AR-TAX/TX	1-2350		3.74
03/31/2000	DEMO-AR-TR	1-6555	42.74	42.74
03/31/2000	DEMO-AR-V102	1-4400		59.90
			306.12	306.12
		Grand Total:	306.12	306.12

Transaction Recap report

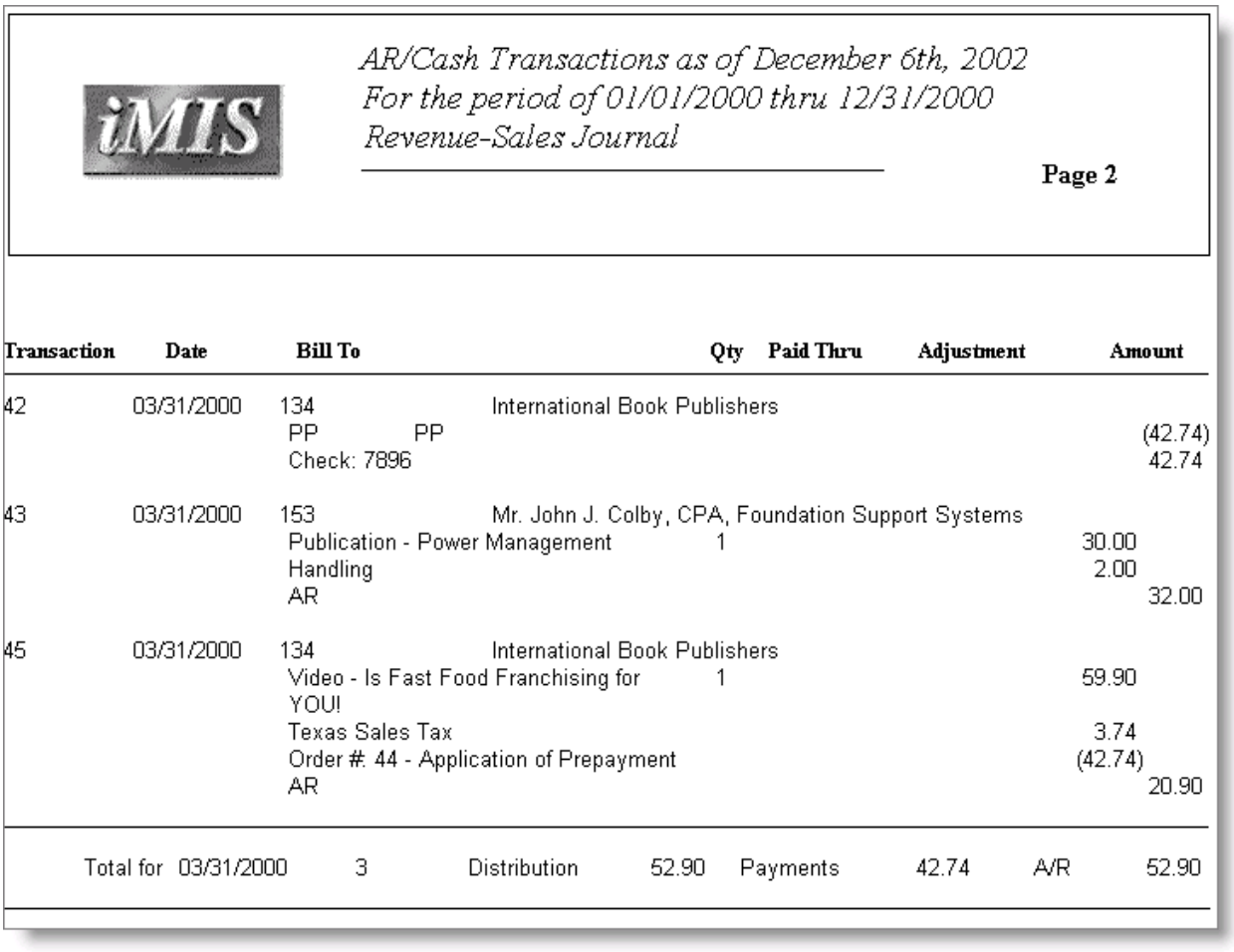


AR/Cash Transactions as of December 6th, 2002
For the period of 01/01/2000 thru 12/31/2000
Debit Memo Journal

Page 1

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment	Amount
44	03/31/2000	134	International Book Publishers				
		PP	PP				42.74
		Order #: 44 - Application of Prepayment				42.74	
Total for 03/31/2000		1	Distribution	42.74	Payments	0.00	A/R 0.00

Debit Memo Journal report



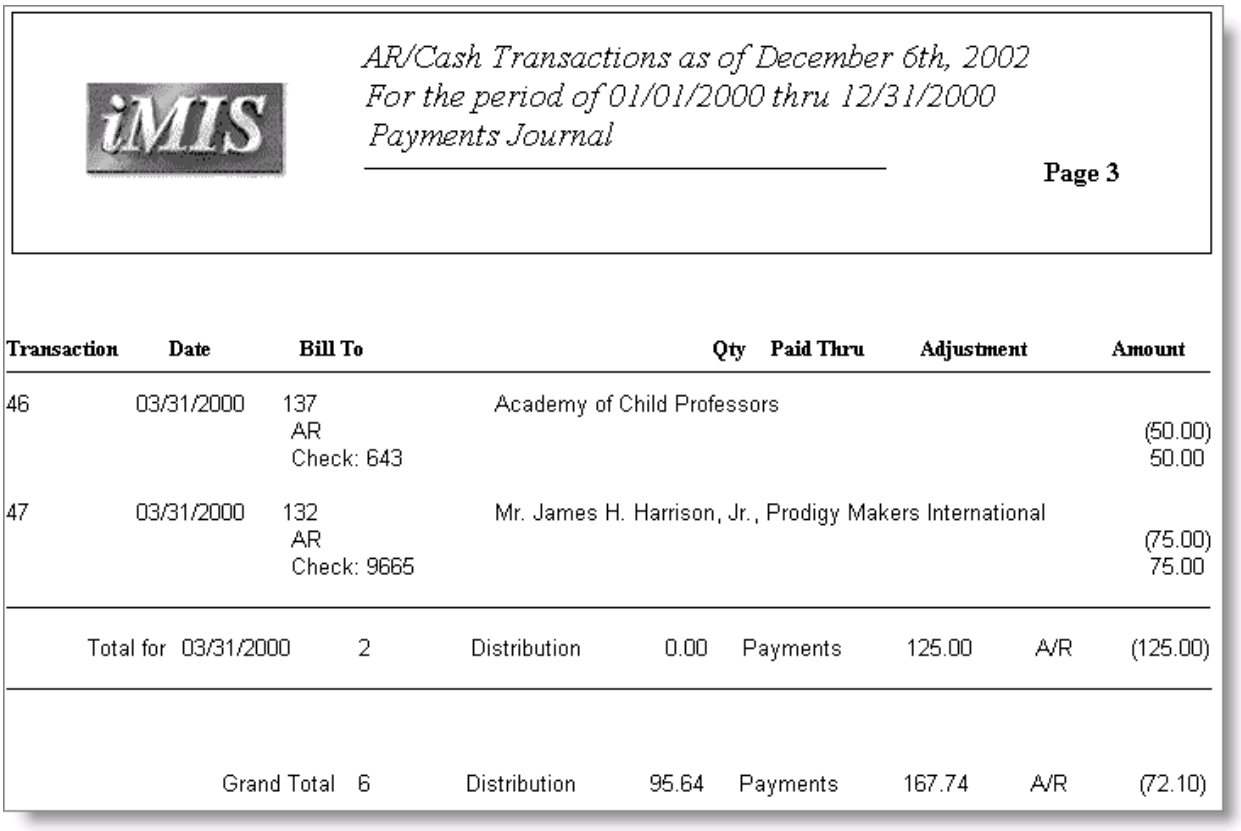
AR/Cash Transactions as of December 6th, 2002
For the period of 01/01/2000 thru 12/31/2000
Revenue-Sales Journal

Page 2

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment	Amount
42	03/31/2000	134	International Book Publishers				
		PP PP					(42.74)
		Check: 7896					42.74
43	03/31/2000	153	Mr. John J. Colby, CPA, Foundation Support Systems				
		Publication - Power Management		1		30.00	
		Handling				2.00	
		AR					32.00
45	03/31/2000	134	International Book Publishers				
		Video - Is Fast Food Franchising for YOU!		1		59.90	
		Texas Sales Tax				3.74	
		Order #: 44 - Application of Prepayment				(42.74)	
		AR					20.90

Total for	03/31/2000	3	Distribution	52.90	Payments	42.74	A/R	52.90

Revenue-Sales Journal report



AR/Cash Transactions as of December 6th, 2002
For the period of 01/01/2000 thru 12/31/2000
Payments Journal

Page 3

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment		Amount
46	03/31/2000	137	Academy of Child Professors					
		AR						(50.00)
		Check: 643						50.00
47	03/31/2000	132	Mr. James H. Harrison, Jr., Prodigy Makers International					
		AR						(75.00)
		Check: 9665						75.00
Total for	03/31/2000	2	Distribution	0.00	Payments	125.00	A/R	(125.00)
Grand Total		6	Distribution	95.64	Payments	167.74	A/R	(72.10)

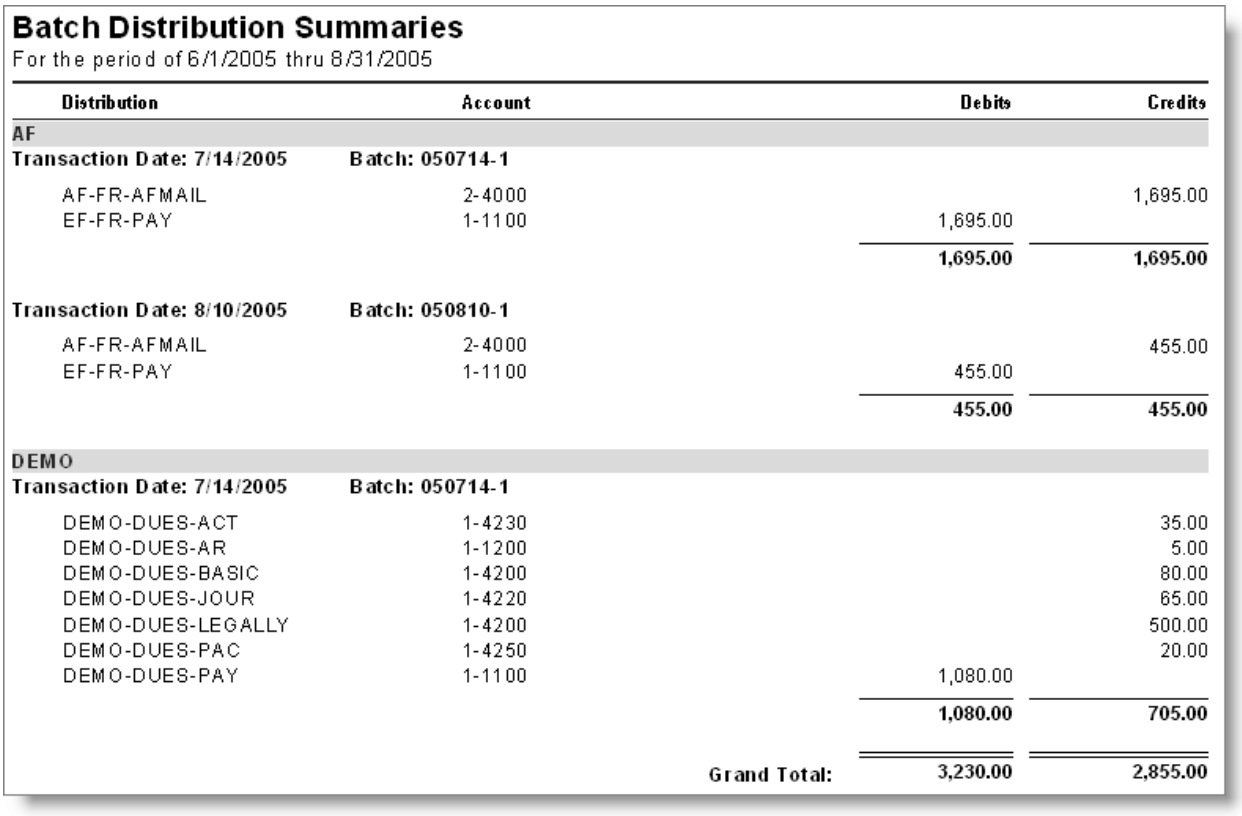
Payments Journal report

Transactions Lists - Batch Distribution Summaries report

The Batch Distribution Summaries report shows the totals for distributions and account numbers within batches, grouped by Entity. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting Reports > Transaction Lists

Desktop: AR/Cash > Generate Reports > Transaction Lists



Batch Distribution Summaries
For the period of 6/1/2005 thru 8/31/2005

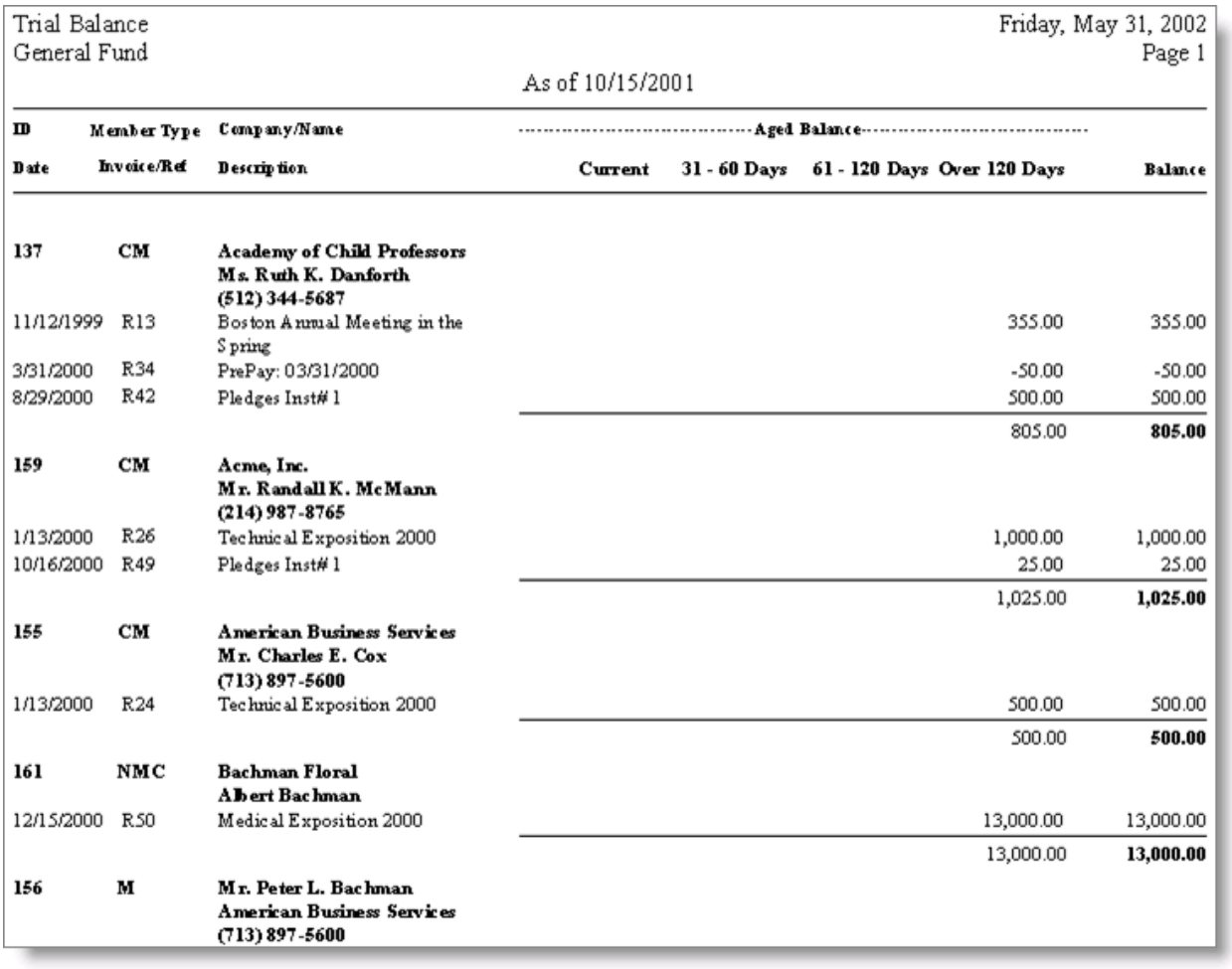
Distribution	Account	Debits	Credits
AF			
Transaction Date: 7/14/2005	**Batch: 050714-1**		
AF-FR-AFMAIL	2-4000		1,695.00
EF-FR-PAY	1-1100	1,695.00	
		1,695.00	**1,695.00**
Transaction Date: 8/10/2005	**Batch: 050810-1**		
AF-FR-AFMAIL	2-4000		455.00
EF-FR-PAY	1-1100	455.00	
		455.00	**455.00**
DEMO			
Transaction Date: 7/14/2005	**Batch: 050714-1**		
DEMO-DUES-ACT	1-4230		35.00
DEMO-DUES-AR	1-1200		5.00
DEMO-DUES-BASIC	1-4200		80.00
DEMO-DUES-JOUR	1-4220		65.00
DEMO-DUES-LEGALLY	1-4200		500.00
DEMO-DUES-PAC	1-4250		20.00
DEMO-DUES-PAY	1-1100	1,080.00	
		1,080.00	**705.00**
	Grand Total:	**3,230.00**	**2,855.00**

Batch Distribution Summaries report

Trial Balance - Trial Balance report

The Trial Balance report lists customer accounts with an open balance, and provides contact name, company name, telephone number, a line for each open item, a summary aging for each account, and a total.

The Trial Balance report is used as a collection report to locate and call overdue customers and is also a month-end accounting report used to balance the iMIS AR subsidiary ledger against the general ledger AR control account.



Trial Balance
General Fund

Friday, May 31, 2002
Page 1

As of 10/15/2001

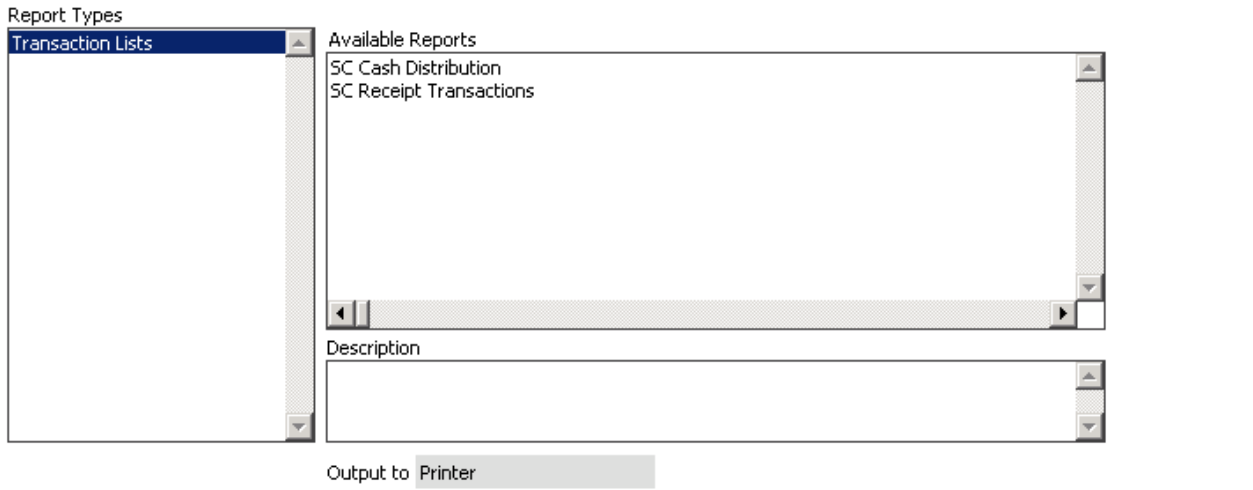
ID / Date	Member Type / Invoice/Ref	Company/Name / Description	Aged Balance: Current	31 - 60 Days	61 - 120 Days	Over 120 Days	Balance
137	**CM**	**Academy of Child Professors** **Ms. Ruth K. Danforth** **(512) 344-5687**					
11/12/1999	R13	Boston Annual Meeting in the Spring				355.00	355.00
3/31/2000	R34	PrePay: 03/31/2000				-50.00	-50.00
8/29/2000	R42	Pledges Inst# 1				500.00	500.00
						805.00	**805.00**
159	**CM**	**Acme, Inc.** **Mr. Randall K. McMann** **(214) 987-8765**					
1/13/2000	R26	Technical Exposition 2000				1,000.00	1,000.00
10/16/2000	R49	Pledges Inst# 1				25.00	25.00
						1,025.00	**1,025.00**
155	**CM**	**American Business Services** **Mr. Charles E. Cox** **(713) 897-5600**					
1/13/2000	R24	Technical Exposition 2000				500.00	500.00
						500.00	**500.00**
161	**NMC**	**Bachman Floral** **Albert Bachman**					
12/15/2000	R50	Medical Exposition 2000				13,000.00	13,000.00
						13,000.00	**13,000.00**
156	**M**	**Mr. Peter L. Bachman** **American Business Services** **(713) 897-5600**					

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > Trial Balance

Desktop: AR/Cash > Account Status > Trial Balance (Crystal)

Reports for Customer Service

Customer service reports window



Admin Console: Continuum > Commerce and Customer Service Reports > Customer service reports
Desktop: Service Central > Generate reports

You can generate two reports through Customer service reports by utilizing Service Central: SC Cash Distribution and SC Receipt.

Transaction. The SC Cash Distribution report is a monthly transaction detail report, sorted by income and account number. The SC Receipt Transaction report is a daily receipts detail report showing all payment details, including a recap by income account.

Printing Service Central Reports

You can print Service Central reports in the same manner as other iMIS modules.

To print Service Central reports

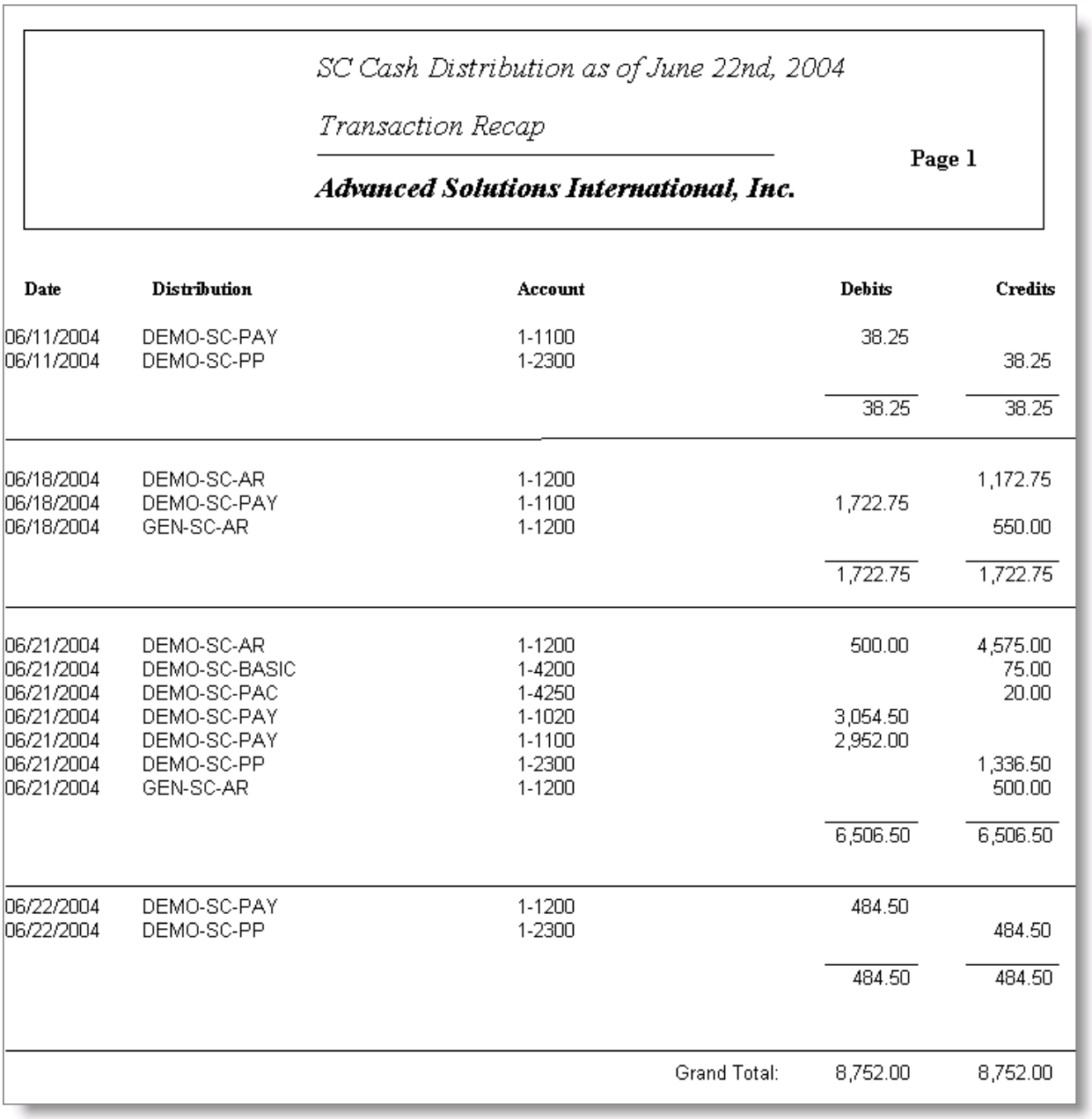
1. From Customer service reports, select a report.

2. Click the Set Report Destination button and select where you want the view the output.
3. Click Run. The Date Range window opens.
4. Enter a Begin Date and End Date for the report.

   Note: Enter a date range that is not greater than 30 days. If you enter a date range that exceeds 30 days.
5. Click OK to run the report.

Sample Service Central Reports

SC Cash Distribution - Transaction Recap report



SC Cash Distribution as of June 22nd, 2004

Transaction Recap

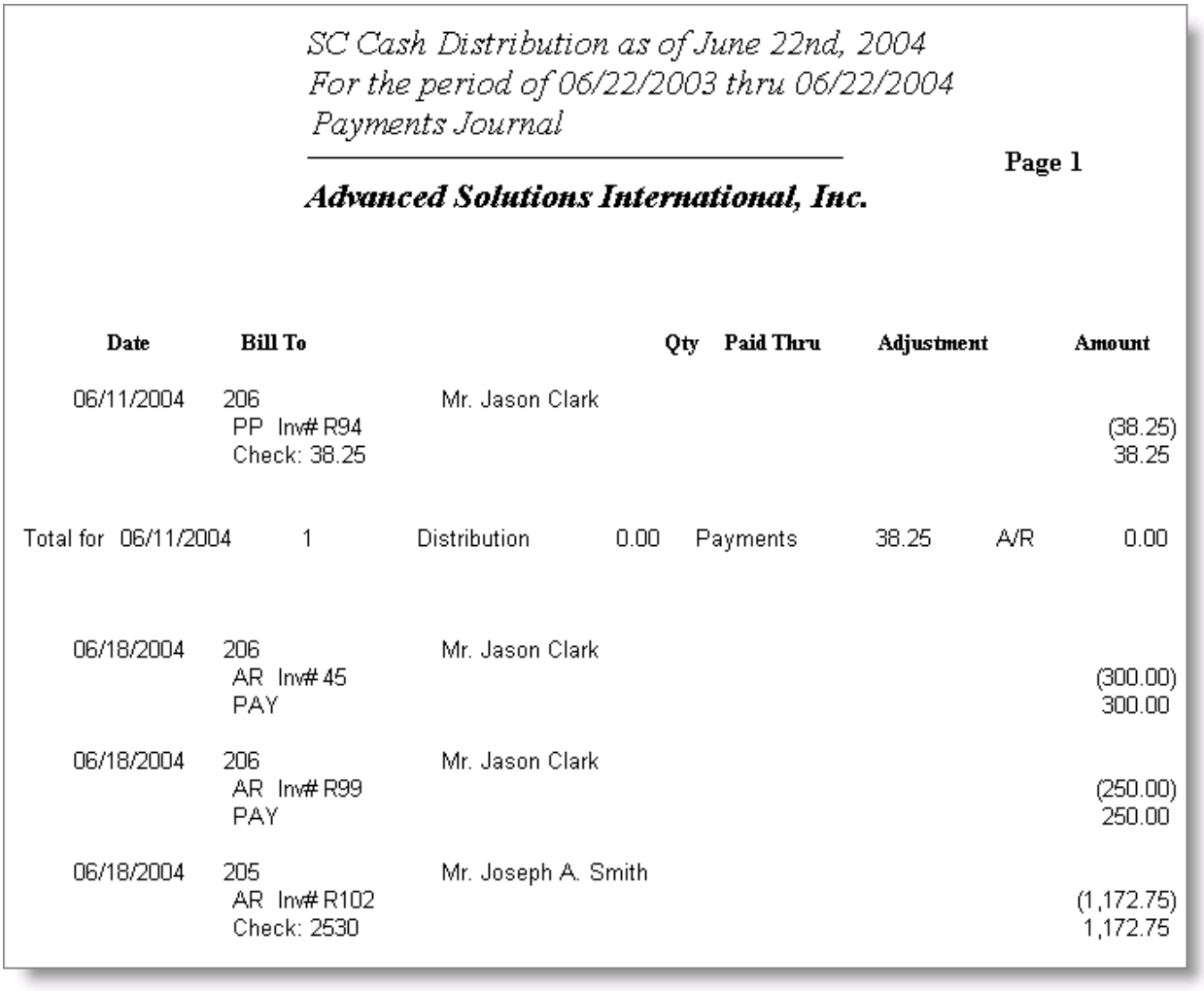
Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
06/11/2004	DEMO-SC-PAY	1-1100	38.25	
06/11/2004	DEMO-SC-PP	1-2300		38.25
			38.25	38.25
06/18/2004	DEMO-SC-AR	1-1200		1,172.75
06/18/2004	DEMO-SC-PAY	1-1100	1,722.75	
06/18/2004	GEN-SC-AR	1-1200		550.00
			1,722.75	1,722.75
06/21/2004	DEMO-SC-AR	1-1200	500.00	4,575.00
06/21/2004	DEMO-SC-BASIC	1-4200		75.00
06/21/2004	DEMO-SC-PAC	1-4250		20.00
06/21/2004	DEMO-SC-PAY	1-1020	3,054.50	
06/21/2004	DEMO-SC-PAY	1-1100	2,952.00	
06/21/2004	DEMO-SC-PP	1-2300		1,336.50
06/21/2004	GEN-SC-AR	1-1200		500.00
			6,506.50	6,506.50
06/22/2004	DEMO-SC-PAY	1-1200	484.50	
06/22/2004	DEMO-SC-PP	1-2300		484.50
			484.50	484.50
		Grand Total:	8,752.00	8,752.00

SC Cash Distribution - Transaction Recap

SC Cash Distribution - Payments Journal report



SC Cash Distribution as of June 22nd, 2004
For the period of 06/22/2003 thru 06/22/2004
Payments Journal

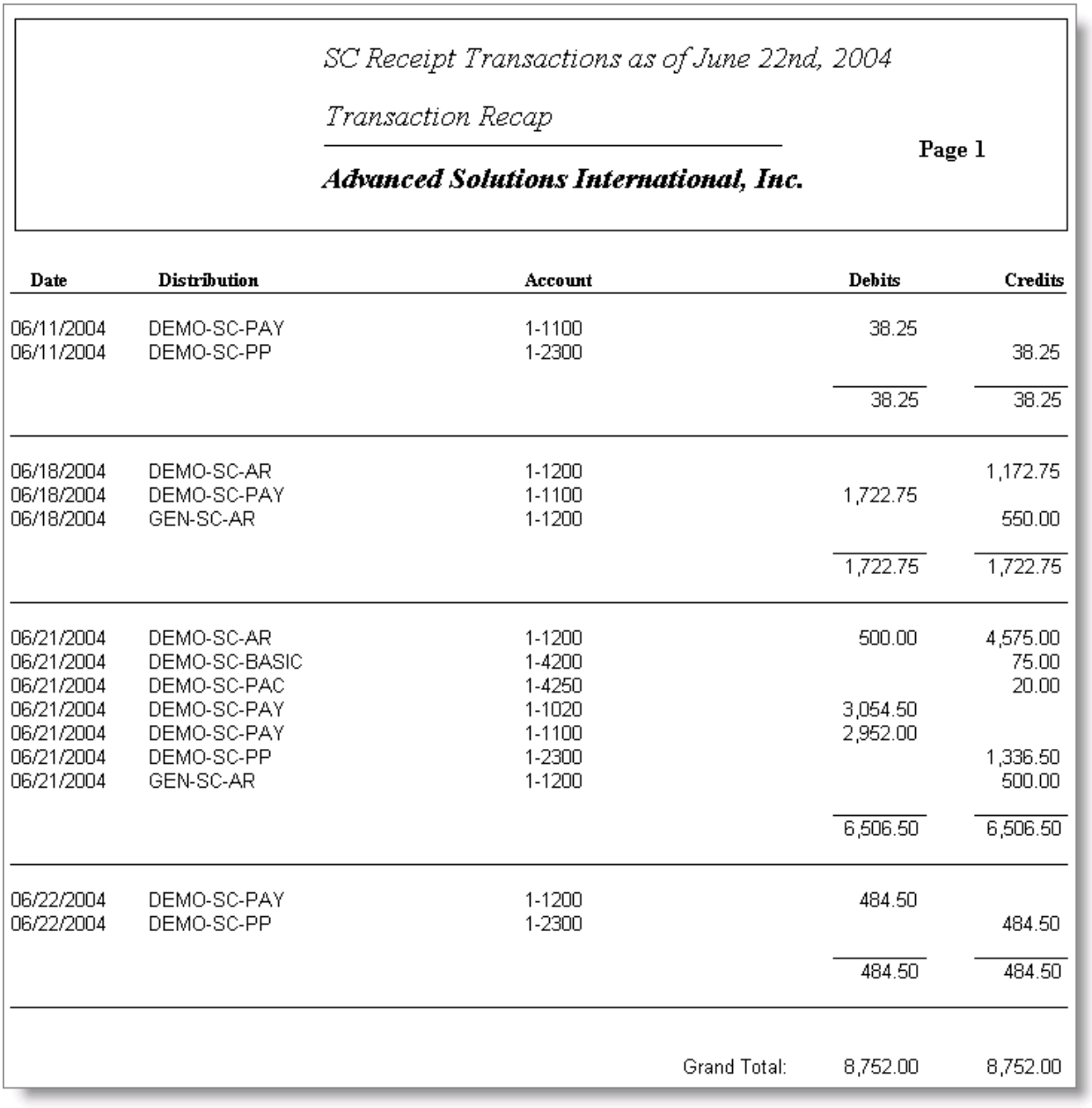
Page 1

Advanced Solutions International, Inc.

Date	Bill To		Qty	Paid Thru	Adjustment		Amount
06/11/2004	206	Mr. Jason Clark					
	PP Inv# R94						(38.25)
	Check: 38.25						38.25
Total for 06/11/2004	1	Distribution	0.00	Payments	38.25	A/R	0.00
06/18/2004	206	Mr. Jason Clark					
	AR Inv# 45						(300.00)
	PAY						300.00
06/18/2004	206	Mr. Jason Clark					
	AR Inv# R99						(250.00)
	PAY						250.00
06/18/2004	205	Mr. Joseph A. Smith					
	AR Inv# R102						(1,172.75)
	Check: 2530						1,172.75

SC Cash Distribution - Payment Journal

SC Receipt Transactions - Transaction Recap report



SC Receipt Transactions as of June 22nd, 2004

Transaction Recap

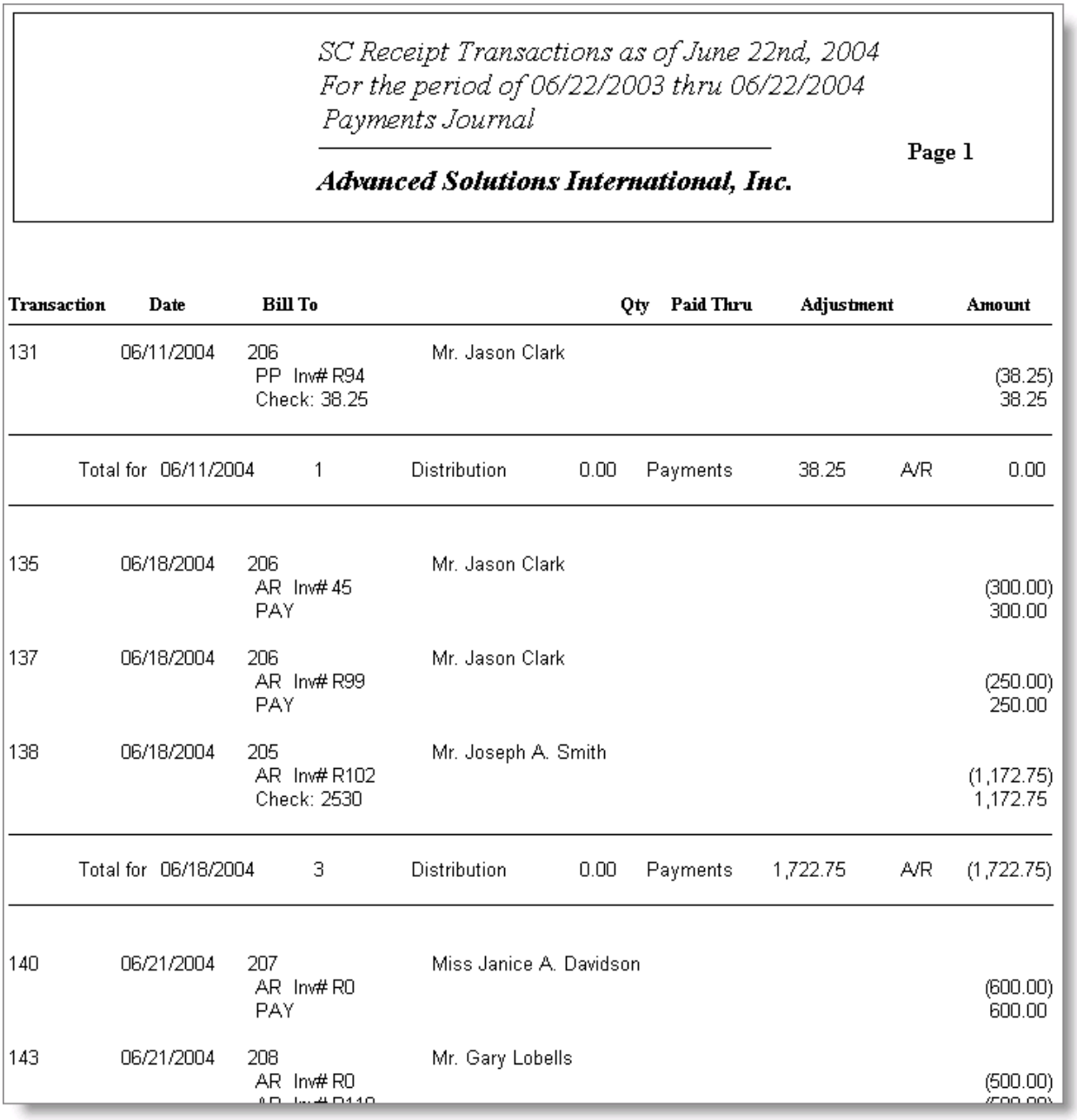
Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
06/11/2004	DEMO-SC-PAY	1-1100	38.25	
06/11/2004	DEMO-SC-PP	1-2300		38.25
			38.25	38.25
06/18/2004	DEMO-SC-AR	1-1200		1,172.75
06/18/2004	DEMO-SC-PAY	1-1100	1,722.75	
06/18/2004	GEN-SC-AR	1-1200		550.00
			1,722.75	1,722.75
06/21/2004	DEMO-SC-AR	1-1200	500.00	4,575.00
06/21/2004	DEMO-SC-BASIC	1-4200		75.00
06/21/2004	DEMO-SC-PAC	1-4250		20.00
06/21/2004	DEMO-SC-PAY	1-1020	3,054.50	
06/21/2004	DEMO-SC-PAY	1-1100	2,952.00	
06/21/2004	DEMO-SC-PP	1-2300		1,336.50
06/21/2004	GEN-SC-AR	1-1200		500.00
			6,506.50	6,506.50
06/22/2004	DEMO-SC-PAY	1-1200	484.50	
06/22/2004	DEMO-SC-PP	1-2300		484.50
			484.50	484.50
		Grand Total:	8,752.00	8,752.00

SC Receipt Transactions - Transaction Recap

SC Receipt Transactions - Payments Journal report



SC Receipt Transactions as of June 22nd, 2004
For the period of 06/22/2003 thru 06/22/2004
Payments Journal

Page 1

Advanced Solutions International, Inc.

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment		Amount
131	06/11/2004	206	Mr. Jason Clark					
		PP Inv# R94						(38.25)
		Check: 38.25						38.25
	Total for 06/11/2004	1	Distribution	0.00	Payments	38.25	A/R	0.00
135	06/18/2004	206	Mr. Jason Clark					
		AR Inv# 45						(300.00)
		PAY						300.00
137	06/18/2004	206	Mr. Jason Clark					
		AR Inv# R99						(250.00)
		PAY						250.00
138	06/18/2004	205	Mr. Joseph A. Smith					
		AR Inv# R102						(1,172.75)
		Check: 2530						1,172.75
	Total for 06/18/2004	3	Distribution	0.00	Payments	1,722.75	A/R	(1,722.75)
140	06/21/2004	207	Miss Janice A. Davidson					
		AR Inv# R0						(600.00)
		PAY						600.00
143	06/21/2004	208	Mr. Gary Lobells					
		AR Inv# R0						(500.00)

Receipt Transaction - Payments Journal

Transaction Summary by Batch

The Transaction Summary by Batch report shows all service (charge) and payment transactions for the current batch. This report is available only if Batch Control is enabled.

Run this report from Service Central > Generate Reports > Transaction by Batch > Transaction Summary by Batch.

Transaction Summary by Date

The Transaction Summary by Date report shows all service (charge) and payment transactions for the current day. This report is available only if Batch Control is not enabled.

Run this report from Service Central > Generate Reports > Transaction by Batch > Transaction Summary by Batch.

Continuum Reporting

Document System

The Document System is the web-based document management system for your entire iMIS system, providing unified management, versioning, and security of your organizational content assets. It lets you view and maintain the full range of definition objects for iMIS:

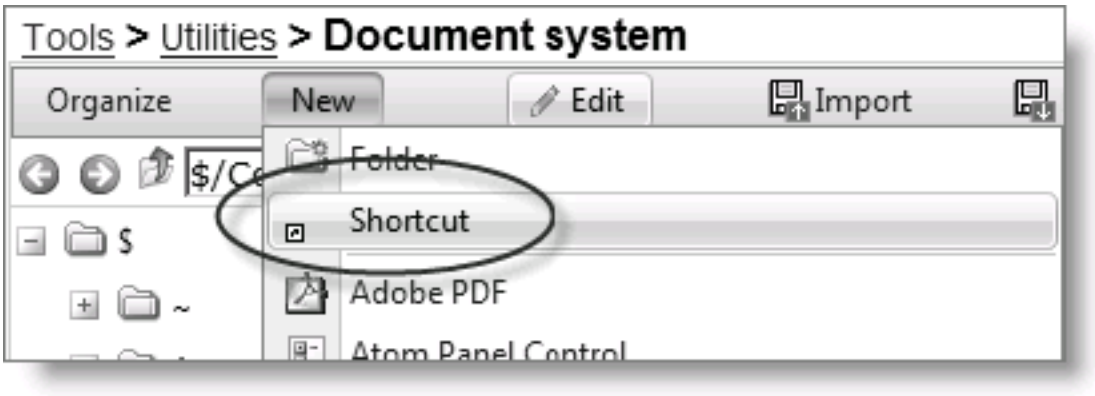
- Business objects, used by Business Object Designer (BOD)
- Queries, used by Intelligent Query Architect (IQA)
- Workflow definitions
- Reports
- HTML files and Microsoft Word files, used for mail merge output

Filtered views

When you use Tools > Document System, you see every type of object (document), but when you see the Document Browser throughout the rest of iMIS, the view is filtered to show you only what you need for that situation. For example, when working with IQA, the Document Browser only shows you queries. In the same way, toolbar commands such as New are filtered so that, when you are working in Business Object Designer, you can create only business objects.

Shortcuts

In the Document System, you can move and copy objects and folders to other folders. Beyond this, you can also create a virtual link (alias) in one folder that points to another object or folder, which keeps you from duplicating objects or folders that you want to share in different contexts.



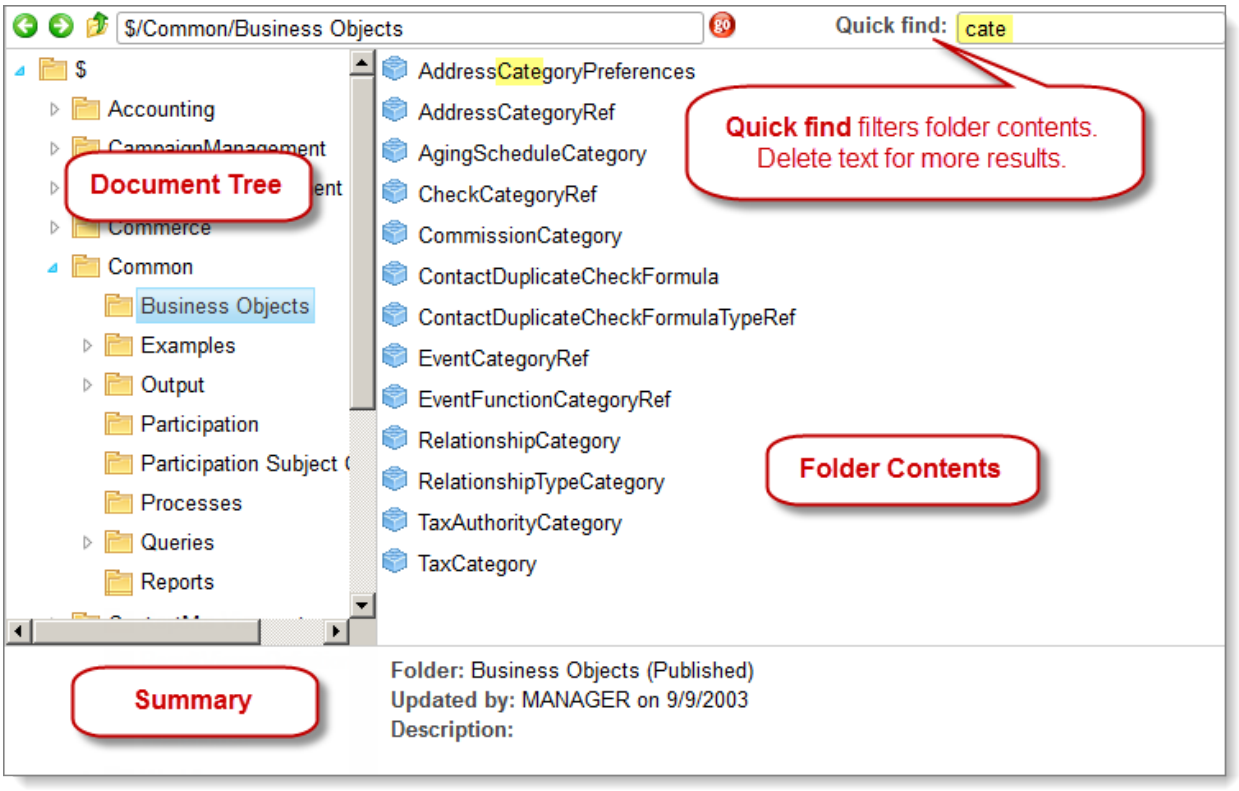
Security access

iMIS users that belong to the SysAdmin security role can see and maintain all definition objects that exist in the Document System. Users who do not belong to the SysAdmin role see a more limited set of definition objects that is determined by the security privileges that are set on each object or on each folder that contains objects.

For example, you can limit the visibility of an entire folder and its definition objects to a specific user-defined security role such as Fundraising Users. Alternatively, you could define that same folder to be visible to Everyone, but limit a few definition objects in that folder to be visible only to Fundraising Users.

Document Browser

Selecting Tools > Document System opens the Document System, which has a toolbar at the top and the three-pane Document Browser below it:



The Document Browser also appears throughout iMIS for locating relevant objects, which it does by filtering the view so that you only see folders and objects that are appropriate for your current task. The Document Browser always appears with these three panes:

1. Document tree (left pane): displays all folders that are relevant to the context in which the Document System is displayed.
2. Folder contents (right pane): displays the contents of the folder that is selected in the document tree area. Folder contents can comprise definition objects, subfolders, or links to items that are located in a different folder.

   Tip: The Quick find box dynamically filters the folder contents, to help you to find items quickly when there are large numbers in the folder. Delete text to see more results. In Desktop, press F12 to apply the filtering.
3. Summary (bottom pane): summarizes the basic properties of the item that is selected in the folder contents area. To show or hide the summary area, select Organize > Display Summary.

Managing document folders

The document tree area of the Document System lists the folders available in the current view of the Document System. The folders that are visible depend on the roles and groups assigned to your user record as well as by what feature of iMIS you are using. The full extent of the folders available in the Document System can be seen only by SysAdmins.

Multiple hierarchies, different roots

There are several Document System hierarchies, each used for different areas of iMIS:

- $/ – Business Object Designer (BOD) has its own hierarchy of business objects. The root is represented by a $ character.
- @/ – Content folders and content records exist in their own hierarchy. The root is represented by a @ character.
- ~/ – Sitemaps each exist as their own hierarchy. The roots are represented by ~ characters.
- $/– All other definition objects exist in the main Document System hierarchy, portions of which are also exposed in other features of iMIS. The root is represented by a $ character.

Tasks that you can perform

- Click an item to select it for use with a toolbar command and to display a read-only summary of its basic properties in the summary area.
- Double-click a folder to open the folder and display its contents.

Toolbar behavior when folders are selected

When a folder in the document tree area is selected, the toolbar commands behave as follows:

- Organize > Refresh refreshes the document tree.
- Organize > Cut, Organize > Copy, and Organize > Paste enable you to copy or move entire folders, including all of their descendants. The cut or copied folder and all of its descendants are placed inside the folder that is selected when you use the Organize > Paste command.
- Organize > Select All selects all contents within the selected folder.
- Organize > Delete moves the selected folder and all of its descendants to the Recycle Bin.
- Organize > Properties shows a read-only summary of the selected folder's basic properties.
- Organize > Display Summary shows or hides the summary panel for the object selected.
- New displays a drop-down list from which you can choose a new folder or definition object type to create in the selected folder. When you select an object type, a properties window appears in which you can define the object. The object types shown in the drop-down list are determined by the properties of the selected folder, which you can examine by using the Edit toolbar command.
- Edit opens a window that enables you to edit the definition of the selected folder.
- Import imports an external XML file (created by the Export command on a different iMIS database) into objects in the Document System. (You cannot use Export and Import to make copies of objects within the same iMIS database.)

  The Upload button reads the XML file contents and displays a list of the definition objects that were exported to the XML file. You can select which of the objects to import, and whether to overwrite objects with the same database GUID in the destination folder or to create new copies of the objects. You can also opt to import the objects to the folder from which they were originally exported, or to override that default destination with the selected folder.

For versioned document types, if a newer version of the object exists in the Document System, then the newer version is not overwritten during the import. Instead, the imported object is added as an archived version of the object. To replace the newer version of the object with the imported object, select Versions from the toolbar, choose the correct version, and click Revert.

- Export exports all selected folders and definition objects into a single XML file, which can later be used to import those objects into the same folder or a different folder in a different iMIS database. (You cannot use Export and Import to make copies of objects within the same iMIS database. To make copies, use Organize > Copy and Organize > Paste.)
- Versions displays a list of the existing versions of the folder, from which you can:
- Export a specific version to an XML file.
- Purge a specific version from the version list, removing all traces of that version from the system.
- Copy a specific version to a new folder with a different name.
- Create an new version based on any existing version by selecting the version, clicking Revert (which creates a new working version), and then publish the working version. If you make no changes to the working version you are effectively reverting to the state of the selected version, although technically it becomes a more recent version in the list of versions.
- Run cannot be used in this context. You must use this command from the folder contents area.
- Publish transforms all working versions of the descendant definition objects in the selected folder into published versions of those objects. Only the most recent published version (of a versionable object) is actively used by the system. You must select the Publish children as well? checkbox when publishing a folder.

To manage folders and objects in the Recycle Bin

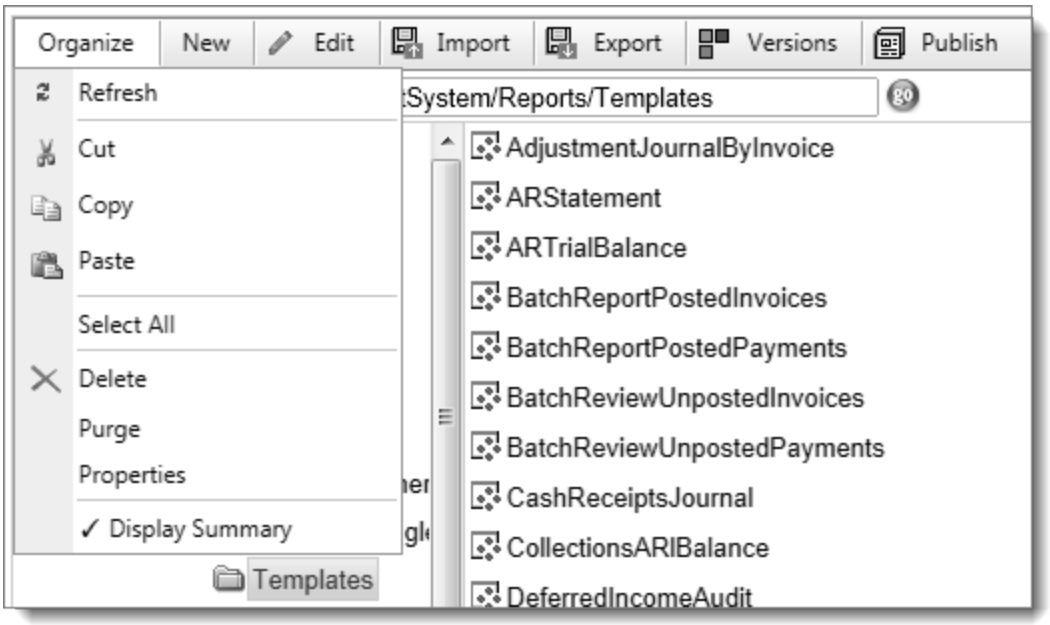
Folders and definition objects that have been deleted are moved to the Recycle Bin at the bottom of the Document System hierarchy.

- To permanently delete individual folders and definition objects that you do not think you'll ever need again, select an object listed in the recycle bin and from the toolbar choose Organize > Purge. To permanently delete the entire contents of the recycle bin, select the Recycle Bin itself and from the toolbar choose Organize > Empty the Recycle Bin.
- To restore a deleted definition object, select it and from the toolbar choose Versions. In the version history that appears, click the Recycled version at the top of the list and click Revert. The definition object is moved to its original parent folder in the hierarchy, and its status changes to Working. You must then re-publish the definition object to make it active again.

  Note: If the definition object's original parent folder no longer exists, the restored object is placed in the root folder of the Document System hierarchy. You must move it out of the root into another folder before you'll be able to publish the object.

Managing folder contents

The folder contents area of the Document System lists the definition objects, subfolders, and links that are stored in the folder selected in the document tree area.



Example of the folder contents area of the Document System

Tasks that you can perform

- Click an item to select it for use with a toolbar command and to display a read-only summary of its basic properties in the summary area.
- Select multiple items for use with a toolbar command or right-click command by holding down Shift or Ctrl while clicking each item. The last object you select is the one whose properties are displayed in the summary area.
- Double-click a definition object to perform one of the following actions (depends on the type of object):
- Open a properties window that enables you to edit the definition of the object.
- Open the Document Utility.
- Double-click a folder to open the folder and display its contents.

Toolbar behavior when items are selected

When an item in the folder contents area is selected, the toolbar commands behave as follows:

- Organize > Refresh refreshes the document tree.
- Organize > Cut, Organize > Copy, and Organize > Paste enable you to copy or move the selected definition objects. The cut or copied objects are placed inside the folder that is selected when you use the Organize > Paste command.
- Organize > Select All selects all contents within the folder.
- Organize > Delete moves the selected objects to the Recycle Bin.
- Organize > Properties shows a read-only summary of the selected object's basic properties.
- Organize > Display Summary shows or hides the summary panel for the object selected.

- New displays a drop-down list from which you can choose a new folder or definition object type to create. When you select an object type, a properties window appears in which you can define the object. The object types shown in the drop-down list are determined by the properties of the folder in which you are working. You can examine these folder properties by selecting the folder in the document tree area, then choosing the Edit toolbar command.
- Edit opens a window that enables you to edit the definition of the selected folder, object, or of the object to which a selected link points.
- Import imports an external XML file (created by the Export command on a different iMIS database) into objects in the Document System. (You cannot use Export and Import to make copies of objects within the same iMIS database.)

  The Upload button reads the XML file contents and displays a list of the definition objects that were exported to the XML file. You can select which of the objects to import, and whether to overwrite objects with the same database GUID in the destination folder or to create new copies of the objects. You can also opt to import the objects to the folder from which they were originally exported, or to override that default destination with the current folder.
- Export exports all selected folders and definition objects into a single XML file, which you can use later to import those objects into the same folder or a different folder in a different iMIS database. (You cannot use Export and Import to make copies of objects within the same iMIS database; to make copies, use Organize > Copy and Organize > Paste.)
- Versions displays a list of the existing versions of a versionable object, from which you can:
- Export a specific version to an XML file.
- Purge a specific version from the version list, removing all traces of that version from the system.
- Copy a specific version to a new definition object with a different name.

- Create a new version based on any existing version by selecting the version, clicking Revert (which creates a new working version), and then publish the working version. If you make no changes to the working version, you are effectively reverting to the state of the selected version, although technically it becomes a more recent version in the list of versions.
- Run executes a selected query, report, or other object types that are designed to be run. If the selected object is a .PDF, .DOC, or .XLS file, this command opens the file in its assigned editor.
- Preview displays a fully rendered view of the selected navigation item, content record, or other CM object types that are designed to be previewed.
- Publish transforms a working version of an object into a published version. Only the most recent published version (of a versionable object) is used actively by the system.

Virtual linking among folders

Many Document System folders in iMIS contain a default virtual link to the Common > Shared Documents folder, which is the central location for definition objects that are available without restriction to all staff users. These virtual links enable users who are given only limited access to the Document System functionality to easily navigate back to the top of the Shared Documents sub-tree.

Caution! These default virtual links to the Shared Documents folder can be deleted by any user that belongs to the SysAdmin role.

There are also some hard-coded virtual links within the Document System, which exposes specific folders in various locations throughout the iMIS interface.

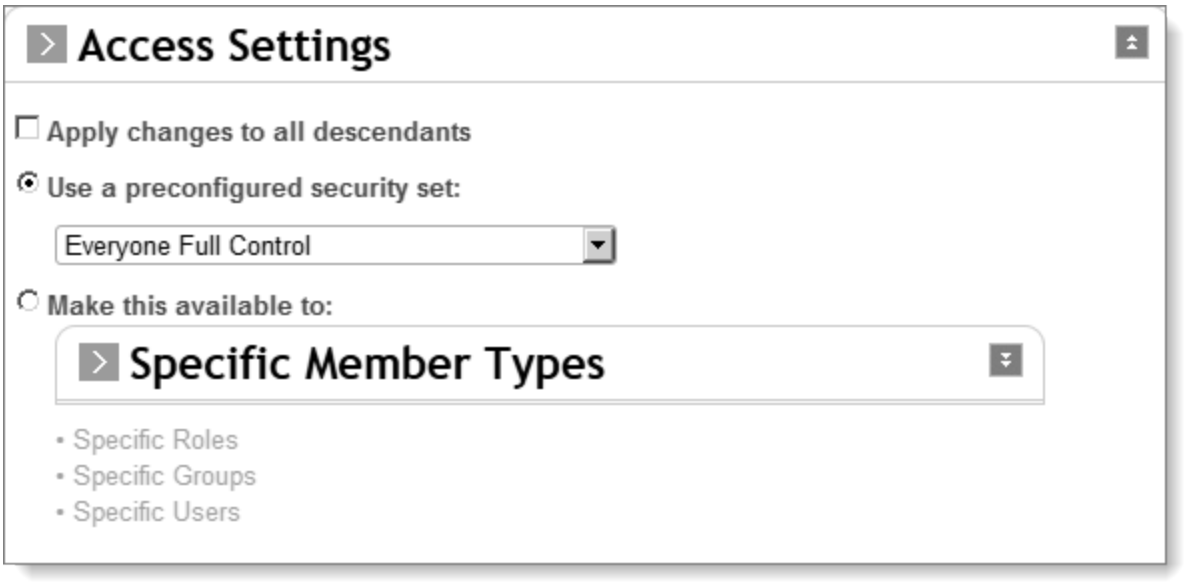
CampaignManagement > DefaultSystem > Reports View	Marketing > Campaign Management > Generate Reports
Common > Output	Marketing > View Output
Common > Shared Docu-	Marketing > Campaign Management > select a source

ments	code > Source Lists tab > from Select Type drop-down list, choose Query
	Marketing > Segmentation > select a segment job > Definition tab > in Universe field click Shortcut to queries
	Marketing > Segmentation > select a segment job > Segments tab > select a segment > in Population field click Shortcut to queries
	Tools > Document system > New Object > Project Process Outputs > Definition tab > in Query field click ...
Common > Shared Documents > Processes	Marketing > Inserts > select an insert > Definition tab > in Output Process field click Browse for Process Engine
	Process Mgr > Set up module > Action Plans tab > select an action plan > select an email notification > in Process Name field click ...
Common > Shared Documents > ReportsView	Home page (Desktop view) > Generate Reports
ContactManagement > DefaultSystem > Queries > Advanced > Contact	Home page (Desktop view) > Advanced Queries > Contacts
	Customers > Advanced Queries > Contacts
ContactManagement > DefaultSystem > Queries > Advanced > Prospect	Home page (Desktop view) > Advanced Queries > Prospects
	Customers > Advanced Queries > Prospects
EventManagement > DefaultSystem > Queries > Advanced > Event	Home page (Desktop view) > Advanced Queries > Events
	Events > Advanced Queries
OpportunityManagement > DefaultSystem > ReportsView	Process Mgr > Generate Reports

OrderManagement > DefaultSystem > Queries > Advanced > Order	Home page (Desktop view) > Advanced Queries > Orders > Advanced Queries
RFMAnalysis > DefaultSystem > ReportsView	Marketing > RFM Analytics > Generate Reports
RFMAnalysis > DefaultSystem > Process Engines	Marketing > RFM Analytics
RFMAnalysis > DefaultSystem > Process Engines > User Queries	Marketing > RFM Analytics > edit an RFM definition object > Definition tab > in Population Query or Transaction Query fields click Shortcut to queries
SegmentManagement > DefaultSystem > ReportsView	Marketing > Segmentation > Generate Reports

Using Access Settings

Access Settings give you a consistent way to apply security (grant permissions) to folders and objects throughout iMIS: entire websites, individual navigation items, content records, queries, business objects, and the wide array of objects that you can define, import, and store in the Document System.



Access Settings are immensely flexible: they let you tie an object's permissions to iMIS security roles, security groups, specific users, member types, or your organization's staff (licensed iMIS users).

Tip: You can meet most of your needs using the preconfigured security sets that ship with iMIS, so become familiar with those.

- Apply changes to all descendants – (Document System folder objects) Changes to this section, when saved, flow automatically to all descendant definition objects. When cleared, changes to this section apply only to the current definition object.
- Use a preconfigured security set - Specifies a preconfigured security configuration to use for this definition object, which is the default and preferred way to set permissions for definition objects. You can see the specific permissions that make up the security set in the Make this available to area.

  Tip: If a preconfigured security set is close to what you need, select it and then select Make this available to, so that the permissions granted by the security set are copied for you to work from.
- Make this available to - Lists the roles, groups, users, member types, or authorization levels that may define or view rendered output from this object. If none of the pre-

configured security configurations meets your needs, you can set custom permissions here.

The SysAdmin, Content Administrator, and Everyone roles are default system-defined security roles that are assigned to every definition object. The SysAdmin role is assigned in the definition of an iMIS user record, but the Content Administrator role is automatically assigned to every iMIS user who is a member of a content authority group (CAG) that is designated as a Master Admin CAG.

The permissions that can be assigned to each entry in the list are:

- Full Control - Enables all of the following permissions.
- Read - Enables users to see this object both in definition windows and as rendered output in websites, but they cannot change the object's definition.
- Add - Enables users to create new objects, or to paste or import an object into the Document System.
- Edit - Enables users to edit this object's definition, but not to delete the object.
- Delete - Enables users to delete this object.
- Select - Enables users to assign a tag to content folders and content records.

Custom security groups (use sparingly)

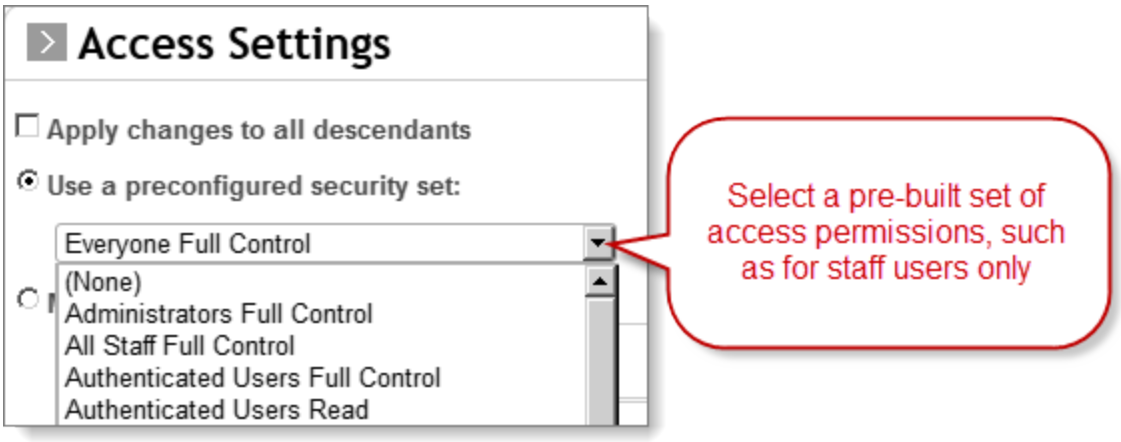
You can add/remove specific Roles, Groups, and Users and assign them each a specific set of permissions. Making this type of change to the security for an object results in a new unique AccessKey for the specified Access List permissions.

You can create a custom security group by tweaking a predefined group or building your own from scratch (using the Make available to radio button). While a custom security group offers great flexibility, it jeopardizes performance, because it adds several rows per object. If the security tables get too large (given that they are joined on every query), your system can slow significantly.

Caution! To minimize performance impacts, avoid using custom security groups where their effect multiplies: folders, Navigation items, and all children the same (unless you are using shared security, or it is mission-critical).

Preconfigured security sets

Throughout iMIS, whenever you configure Access Settings, you see a drop-down list of available security settings that you can apply to individual folders and objects. These security sets offer you easier control and faster iMIS performance than defining custom ones.



These are the key security sets you should use, from most permissive to least:

- Everyone * – no restrictions, including the public (if they can access this level/context).
- Authenticated Users * – restricts access to users who are signed in (both staff and public members).
- * Staff * – restricts access to users by licensing: Full Staff Full Control limits to Full users, Casual Staff Full Control limits to Casual users, and All Staff Full Control limits to Full and Casual users.
- Administrators * – restricts access to users with the SysAdmin role.

Tip: If you do not have the feature named in the security set (such as Certification), do not use the set.

iMIS ships with these pre-built security sets to cut down on the customization you need, for objects that should be neither unsecured (Share) nor locked for you alone (Private). Each security set contains a predefined Access List and permissions (Full Control, Read, Add, Delete, Edit) that are constant for all objects that use it. A Select permission is also available for tagged objects.

When you choose a set, the Current Access List below it updates to show the settings it includes. Look at those details to decide if the selected security set has the permissions you need.

Feature-specific default security

Most feature-specific security sets have three levels (Admin, Manager, User), each of which allows access for any level above it. For example, "Certification Users" grants access for Managers and Admins as well. Note that you can define your own access settings based on User-level security: Roles and Groups.

For example, applying Segmentation Job Default Access security means that

- users in the "SegAdmin" group get control privileges
- users in the "SegMgr" group get Read+Add+Edit+Delete privileges
- users in the "SegUser" group get Read-only privileges
- users in the "SysAdmin" role get control privileges

Setting access for folders and objects

iMIS SysAdmins have Full Control access to all folders and objects in the Document System, so they can also define security privileges for every folder and object.

Caution

- New folders have unrestricted access: When a new folder is created, the Everyone role is granted Full Control by default.

- Folder permissions are not the same as per-object permissions: you can set Control/Read/Add/Edit/Delete privileges individually for most definition object types in the Security page of its properties window, independent of the folder.
- IQA folders are special: Certain folders within the Document System are exposed through the IQA task list item in Customers, Events, Billing, Fundraising, and Orders. These folders and all sub-folders that they contain behave differently when viewed from the IQA task list item:
- You can create only queries in these folders even if the folder is defined to allow any type of definition object. Only members of the SysAdmin role who edit these folders from Tools > Document System can create the other types of allowable objects.
- If any user modifies the folder definition to disallow the creation of Query objects, the folder and all of its contents become invisible from within an IQA task list item. Only members of the SysAdmin role who are viewing the entire Document System via Tools > Document System are subsequently able to see the folder.

To define security access for a folder

1. In the Document System, select a folder and click the Edit toolbar command.
2. In the Only allow certain types of objects in the folder? area, specify the objects to be allowed in the folder.

   Multi-select object types from the list by holding Shift or Ctrl while clicking items in the list.
3. For the Access Settings, select Private or else select Use a preconfigured security set and select a set from the list, if any apply.
4. If you need custom access settings, enable Make this available to and complete the panel.

- For Specific Roles, select the checkbox for each system-defined role that should have access to the folder. For each role, you can click the Edit icon next to the role name to define the specific privileges for that role.

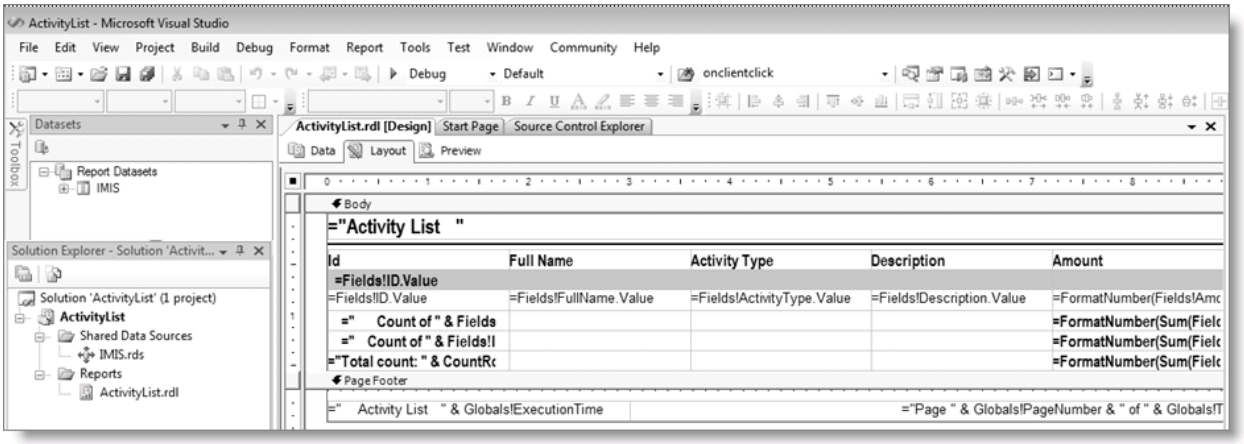
- For Specific Groups and Specific Users areas, add the groups and users that should have access to this folder, and click the Edit icon next to each entry to define the specific privileges for that entry.

5. At the bottom of the folder security definition window, click Save to commit the changes.

Quick facts: SSRS reports

iMIS natively supports SQL Server Reporting Services (SSRS) for both static and dynamic reporting capability with SQL Server databases. Reporting Services includes everything you need to create, distribute, and manage reports.

Important: iMIS supports Crystal Reports, but all new iMIS reports use SSRS.



What do I need to license or buy?

Nothing! iMIS installs the SSRS Report Viewer control for ASP.NET applications that comes with Microsoft Visual Studio. iMIS uses the Report Viewer control, which offers a document map, jump-to-page, zoom, and search. iMIS enables the control's built-in report navigation (pagination), parent report support, and export functionality, including Excel (XLS) and PDF formats.

- Microsoft freely distributes the Report Viewer control
- You can edit the XML-based report format in any text editor

- Visual report designers, Report Builder and Business Intelligence Development Studio, are free for download

  How do I run reports in iMIS?

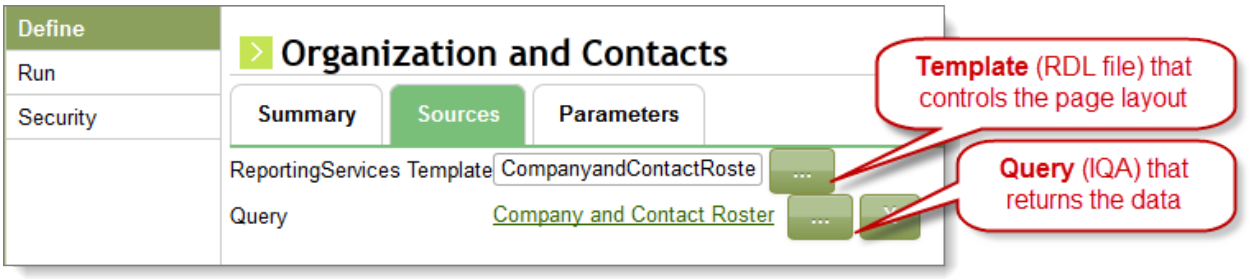
- Generate a default SSRS report on the fly using the Report command in IQA.
- Browse to a content record that has an SSRS Report iPart configured on it.
- Open a navigation item that lists all of the reports in a given folder, and select one.
- Run SSRS reports directly from the Document System.

  Where to find samples: In the Document System, go to $\Samples\ReportingServices to access example SSRS reports (each of which has a query, a template, and a run-time report).

Creating SSRS reports

To use SSRS reports natively in iMIS, you work with three associated objects:

1. Query – provides the data needed for the report.
2. Template (Reporting Services Template, the .RDL file) – provides the formatting to display the results, such as a matrix or pie chart. IQA uses a default template that you can generate from any query, either to save in the Document System or to export as an RDL, for editing and reimport.
3. Report (the runtime report, an iMIS output process) – binds the query and the template, sets the name, parameters, and security, and makes the report usable from an iPart or list of reports.



You can generate a default table-based SSRS report just by using the Report command in IQA. These you can export so that you can craft production-quality page layouts or add charting and graphing.

Can't I just use IQA?

Yes, take advantage of queries and special iParts to filter and present iMIS data to your users. See Displaying query results in iParts for the growing number of query-based iParts available.

But some situations require the full power of Reporting Services. You might, for example, need

- a different type of chart or graph than is available
- to change the chart from listing counts to showing percentages
- to add special header/footer and page layout for production quality
- to output the records in list format, one per page

How hard is adding a report?

Faster than you can brew a cup of tea, you can publish a new report in iMIS. Suppose that you need a new report, and you want this report added to your site, for easy access. Without using report editors at all, you can achieve this in a few steps:

1. Create and save your query.
2. Click Report to generate the default report.

   Tip: If you want to adjust any layout defaults, you can do so in SystemConfig table settings.
3. Click Save Report Definition to iMIS. Select the name and location you want and click Save, which creates the template and report file, already bound to your query.
4. Add access to your new report by adding an SSRS Report iPart (Utility folder) to an appropriate content record. Enable Excel and PDF exporting as needed.

   Tip: Most reports display best on content records that use single-column layouts.

What is the easiest way to change a report?

Suppose that you already added a default report to your site, but you now need to add a pie chart. The essential process is this:

1. Download the RDL template: edit the query, click Report, click Save Report Definition to Workstation, and Save it.
2. Edit it in your report writer.

- Tutorial: Adding a Pie Chart to a Report
- How to: Display Data Point Labels Outside a Pie Chart

3. Upload it to iMIS as a new template: in the Document Browser, select New > Reporting Services Template, and browse to your RDL file.
4. Update the report runtime to use it: edit the report file, and browse to your new template.

Using iMIS to generate SSRS reports

You can take advantage of the dynamic reporting feature of IQA to generate many of the reports you need, without using any report editors:

1. In the Document System, browse to your query and choose Edit.
2. Click Report to generate a report that is dynamically formatted using the settings you control through SystemConfig parameters.
3. Under Options, select Save Report Definition to iMIS.
4. Browse to the save location you specified and edit the outputs as needed:

- Reporting Services Template: , which exports as [QueryName].rdl
- Reporting Services Report: , which exports as [Query Name] and binds template to query

  For example, you might edit the report's Parameters tab to hide the report's parameters at run-time or to preset values (such as to make this report display Texas locations only).

5. Create a content record with an SSRS iPart to display your new report:

- In Content Designer > Manage content, open an appropriate folder to house your new report.
- From the toolbar, select New > Website content.
- For add new content, open the Utility folder and select the SSRS Report iPart.
- Configure the iPart to point to the report ( ) you just created.

6. Deploy the content into the site through a new navigation item, tagging, or other method.

Creating reports in SQL Server tools

1. Install the free report writing tool that works with your version of SQL Server:

- Microsoft SQL Server 2008 R2 Report Builder 3.0
- Microsoft SQL Server 2005 Express Edition Toolkit, which installs SQL Server Business Intelligence Development Studio (BIDS)

2. Reuse or copy reports created in other editions. When you publish a report created in an earlier version of Reporting Services, it upgrades to the newer format.
3. Create reports using any Reporting Service features: drill-through reports, sub-reports, and parameterized reports that include charts, tables, matrices, and lists.
4. Publish to a report server. To make a published report available to users, use Report Manager to create role assignments that grant access to it.

Adding custom SSRS reports and subreports

If you have designed your own RDL source files, you can upload them into iMIS templates, create reports (which link templates to queries), and display those reports with SSRS iParts.

Note: In Reporting Services, subreports are stored as separate RDL files that the main report references. Therefore, you need to upload them into iMIS separately.

To add an SSRS report to iMIS

1. Import your template (RDL) into iMIS as a Reporting Services Template:

- In the Document System, open the \Reports\Templates folder for the target module.
- From the toolbar, select New > Reporting Services Template.
- Browse to the source RDL file on your file system.

2. Create a report that will bind a query to this template as a Reporting Services Report:

- In the Document System, open the \Reports folder for the target module.
- From the toolbar, select New > Reporting Services Report. This object is a process engine.
- On the Sources tab, specify which Reporting Services Template and IQA query to use.
- On the Parameters tab, choose whether to show the report's parameters at run-time and whether to preset their values (such as to make this report display Texas locations only).

3. Create a content record with an SSRS iPart to display your new report:

- In Content Designer > Manage content, open an appropriate folder to house your new report.
- From the toolbar, select New > Website content.
- For add new content, open the Utility folder and select the SSRS Report iPart.
- Configure the iPart to point to the report ( ) you just created.

4. Deploy the new content into the site through a navigation item, tagging, or other method.

To add SSRS subreports to iMIS

Creating a report that has subreports is the same process, except that you also import the subreport RDL files into the same folder as the main (parent) RDL file.

1. Import your template (RDL) into iMIS as a Reporting Services Template:
2. In the same folder, also create templates for each subreport RDL used by the main report. iMIS can run the subreports specified in the main report only if they are in the same folder.

3. Create a report that will bind a query to this template as a Reporting Services Report:
4. Create a content record with an SSRS iPart to display the main report:
5. Deploy the content into the site through a new navigation item, tagging, or other method.

Direct URL calls to run one-off reports

Content Management also supports direct calls to its reports from your web page code, so that you can create one-off reports you may need. This sample code for a Print Detail button on the Batch details page shows the process:

1. Call a content item (@/iMIS/Accounting/BatchDetailReport).
2. Pass it a parameter (Batch Number) as a URL parameter.

```
protected void PrintDetailClick(object sender, EventArgs e)
{
   Guid documentKey = DocumentSystem.DocumentKeyByPath("@/iMIS/Accounting/BatchDetailReport");

   Document d = DocumentController.Document(documentKey);

   Business.ContentManagement.Content content = Business.ContentManagement.Content.GetFromDocument(d);

   string url = string.Format(CultureInfo.InvariantCulture, "{0}?&Batch Number={1}", content.GetNavigateUrl(), Batch.BatchNumber);

   Response.Redirect(url);
}
```

Customizing SSRS reports

Changing the default layout for SSRS reports

Your iMIS database stores configuration parameters that control the layout and design of reports generated through Reporting Service (SSRS). These parameters in the SystemConfig table control the look and feel of SSRS reports being created system-wide.

For example, if you have international customers, a helpful change might be to configure the reports for A4 format (21.0 x 29.7 cm).

Tip: Like Word templates, these configuration settings control new reports only; layout changes do not propagate to existing reports. Therefore, test and perfect your settings before creating new SSRS reports, to minimize rework later.

To change SSRS layout parameters

3. Use your favorite SQL query tool to access the SystemConfig table in iMIS.
4. Change the values as needed.

   Tip: For valid color names and samples, search the web for aspnet named colors.
5. Restart IIS (or reboot the server) to clear the cache and apply the changes.

SSRS layout parameters

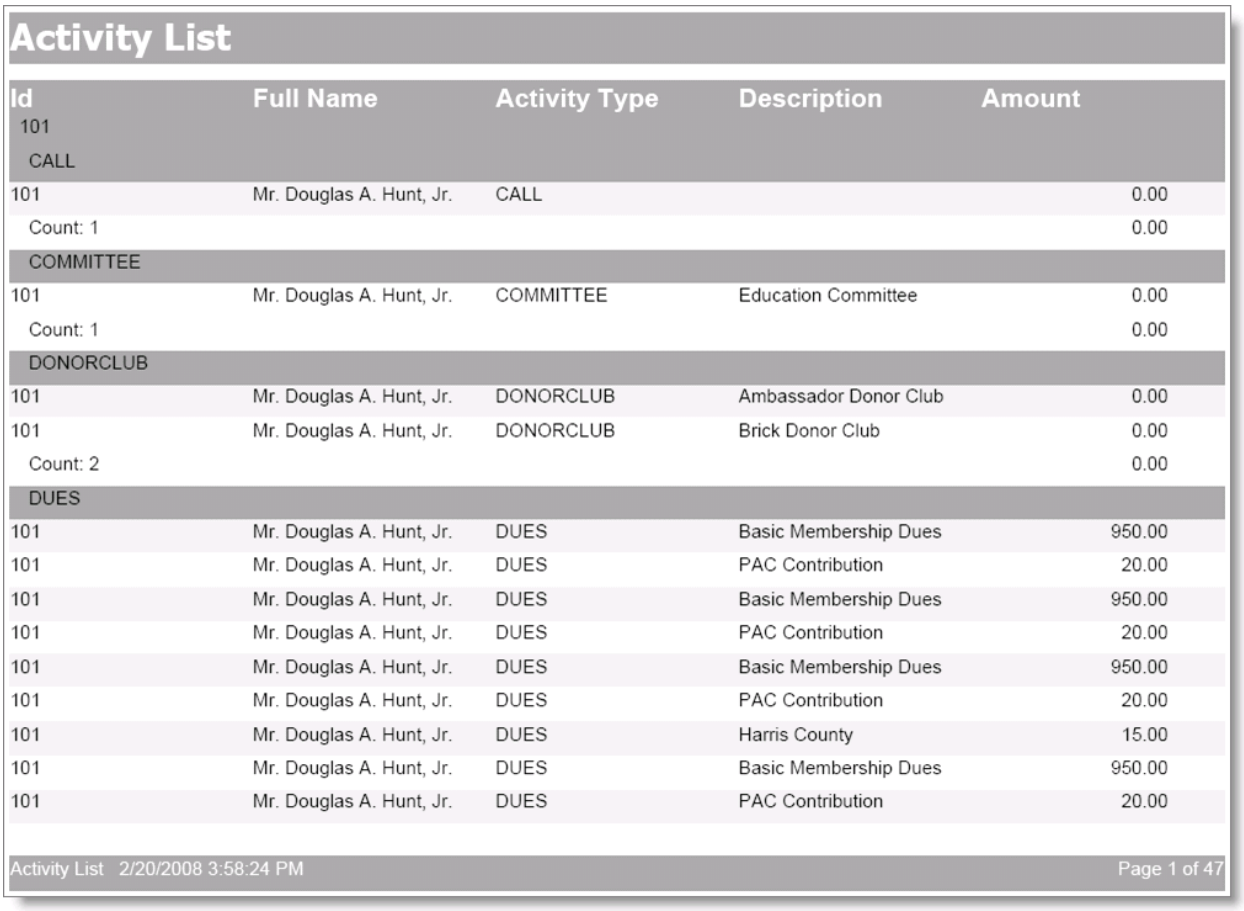
You can generate the table below using this query:

```
select ParameterName, ParameterValue, Description
from SystemConfig where ParameterName like 'SSRS%'
order by ParameterName
```

.BodyReportItemsHeight	0.2	Body report items height (units only, no UOM) used when generating SSRS reports
.BottomMargin	0.5	Bottom margin (units only, no UOM)

		used when generating SSRS reports
.DetailFont	Arial	Detail font for generated SSRS reports
.EnableGreenBar	false	Turns on alternating background color in rows of generated SSRS reports
.FieldHeaderBackgroundColor	White	Named color used when generating SSRS reports
.FieldHeaderForegroundColor	Black	Named color used when generating SSRS reports
.FooterHeight	0.3	Footer height (units only, no UOM) used when generating SSRS reports
.GreenBarBackgroundColor	LightSteelBlue	Named background color used when EnableGreenBar is true for generated SSRS reports
.GroupHeaderBackgroundColor	LightSteelBlue	Named color used when generating SSRS reports
.GroupHeaderForegroundColor	Black	Named color used when generating SSRS reports
.HeaderFont	Arial Narrow	Header font for generated SSRS reports
.HeaderHeight	0.25	Header height (units only, no UOM) used when generating SSRS reports
.LandscapeTotalWidth	11	Total page width (units only, no UOM) for landscape orientation paper used when generating SSRS reports
.Language	en-US	Default language used when generating SSRS reports
.LeftMargin	0.5	Left margin (units only, no UOM) used when generating SSRS reports
.PageFooterBackgroundColor	White	Named color used when generating

		SSRS reports
.PageFooterForegroundColor	Black	Named color used when generating SSRS reports
.PageHeaderBackgroundColor	White	Named color used when generating SSRS reports
.PageHeaderForegroundColor	Black	Named color used when generating SSRS reports
.PortraitTotalWidth	8.5	Total page width (units only, no UOM) for portrait orientation paper used when generating SSRS reports
.RightMargin	0.5	Right margin (units only, no UOM) used when generating SSRS reports
.SeparatorLineColor	DarkBlue	Color of the separator line for generated SSRS reports
.TableCellWidth	1.8	Width for table cells (units only, no UOM) used when generating SSRS reports
.TopMargin	0.5	Top margin (units only, no UOM) used when generating SSRS reports
.UnitOfMeasure	in	Unit of measure used when generating SSRS reports



Activity List

Id	Full Name	Activity Type	Description	Amount
101				
CALL				
101	Mr. Douglas A. Hunt, Jr.	CALL		0.00
Count: 1				0.00
COMMITTEE				
101	Mr. Douglas A. Hunt, Jr.	COMMITTEE	Education Committee	0.00
Count: 1				0.00
DONORCLUB				
101	Mr. Douglas A. Hunt, Jr.	DONORCLUB	Ambassador Donor Club	0.00
101	Mr. Douglas A. Hunt, Jr.	DONORCLUB	Brick Donor Club	0.00
Count: 2				0.00
DUES				
101	Mr. Douglas A. Hunt, Jr.	DUES	Basic Membership Dues	950.00
101	Mr. Douglas A. Hunt, Jr.	DUES	PAC Contribution	20.00
101	Mr. Douglas A. Hunt, Jr.	DUES	Basic Membership Dues	950.00
101	Mr. Douglas A. Hunt, Jr.	DUES	PAC Contribution	20.00
101	Mr. Douglas A. Hunt, Jr.	DUES	Basic Membership Dues	950.00
101	Mr. Douglas A. Hunt, Jr.	DUES	PAC Contribution	20.00
101	Mr. Douglas A. Hunt, Jr.	DUES	Harris County	15.00
101	Mr. Douglas A. Hunt, Jr.	DUES	Basic Membership Dues	950.00
101	Mr. Douglas A. Hunt, Jr.	DUES	PAC Contribution	20.00

Activity List 2/20/2008 3:58:24 PM Page 1 of 47

Example of an Activity List report using the EnableGreenBar feature to highlight alternating lines.

Getting report layouts from iMIS

The SSRS template file format is Report Definition Language, which uses an .RDL extension. These are much like Crystal .RPT files, but they are defined in XML. Because they are XML, you can edit .RDL files in any text editor; however, you need free tools available for your version of SQL Server to design the report visually and to preview your report layouts with data.

To generate RDL files from IQA

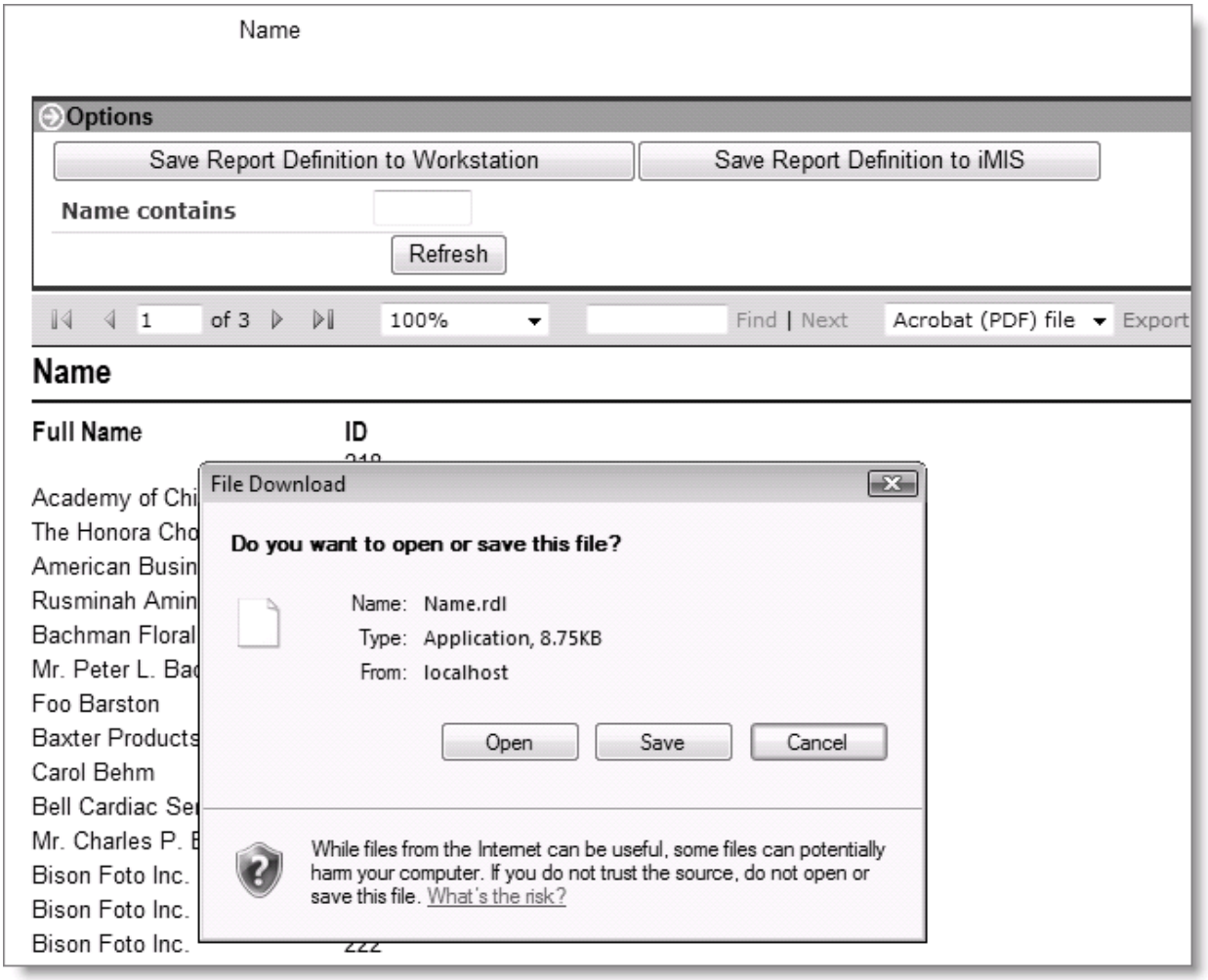
1. From the query definition, click Report.

   iMIS generates the report in memory; nothing is saved to database or disk yet.

2. If the query results need adjustment, click Define, make your changes, and click Report.
3. When the results are good, save the report to a permanent format:

- Save Report Definition to iMIS copies the report to the Document System, for future availability in iMIS.
- Save Report Definition to Workstation copies the report to your file system, for editing outside of iMIS:

  When prompted, choose Open to launch the file in the application is associated with the .RDL extension, or choose Save to copy the file to the locally.



To retrieve an .RDL from the Document System

1. Locate the .RDL template within the Document System.

Tip: Be sure you're selecting the template, not the output process!

2. Select the Run icon.
3. When prompted, select Open.

   Tip: You can choose Save rather than Open, but be aware that BIDS will copy the file into its project location when you add it to a project, regardless. However, be sure to re-import your edited version, not the original!

4. Edit the file, and save it to your file system.
5. Import the edited file into the Document System, either as an updated version or as a new template.

Setting up SQL Server tools to edit iMIS reports

You can customize Reporting Services reports using free SQL Server tools:

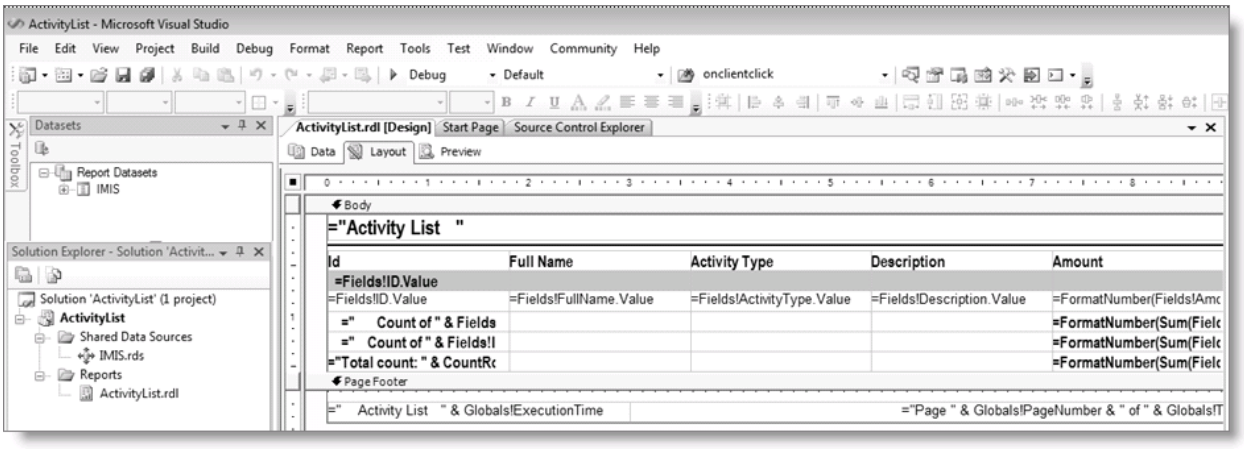
- Microsoft SQL Server 2008 R2 Report Builder 3.0
- SQL Server Business Intelligence Development Studio (BIDS) installs with the SQL Server 2005 Express Edition Toolkit.

To prepare your environment

1. Uninstall any beta or Community Technology Preview (CTP) versions of SQL Server Management Studio Express.
2. Verify you have administrative rights and ample free space on the machine where you will be working with reports: 600 MB for the toolkit.
3. Install Microsoft .NET Framework 4.0.
4. Install your version of Microsoft SQL Server Express Edition.
5. Install your report tool using the links above.

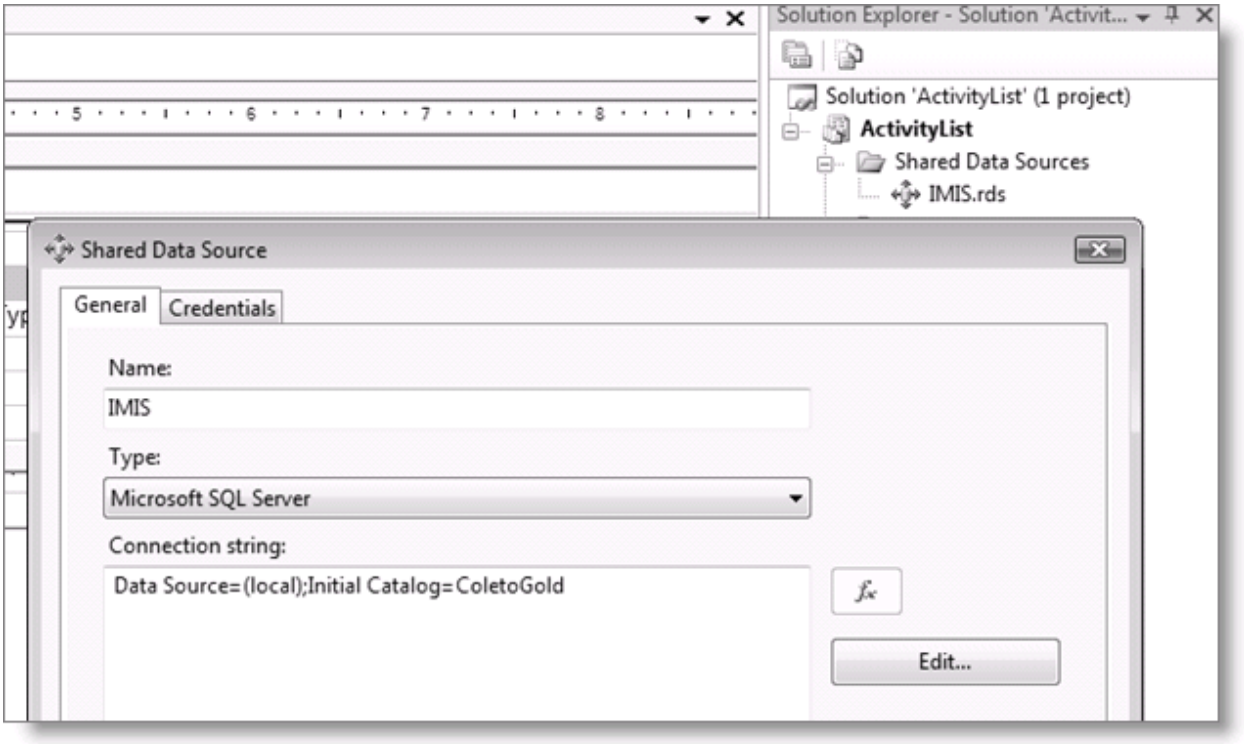
To work with an .RDL in BIDS

1. Create a new Report Server project (File > New > Project > Report Server Project).



2. For the project, create a new Shared Data Source.

- Name it IMIS.
- Use Edit... to specify your server and database.
- Select the Credentials tab to specify your SQL Server login.

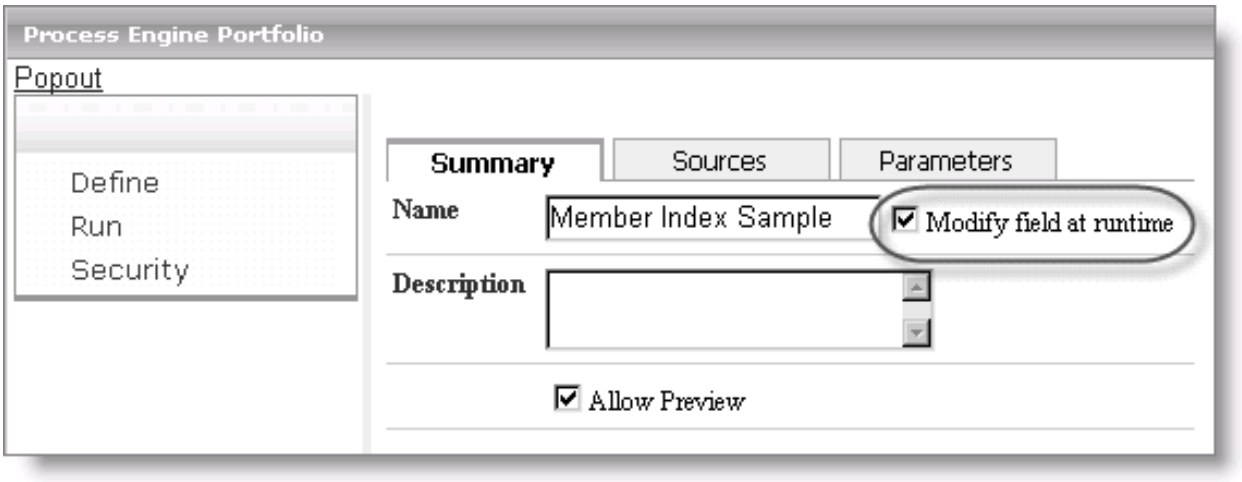


3. In the Solution Explorer, right-click Reports, Add / Existing Item, and browse to the .RDL file downloaded from IQA.

4. Edit the report definition, and select Save.
5. Import the report back into the Document System, or use it in a separate SQL Server Reporting Services server environment, as needed.

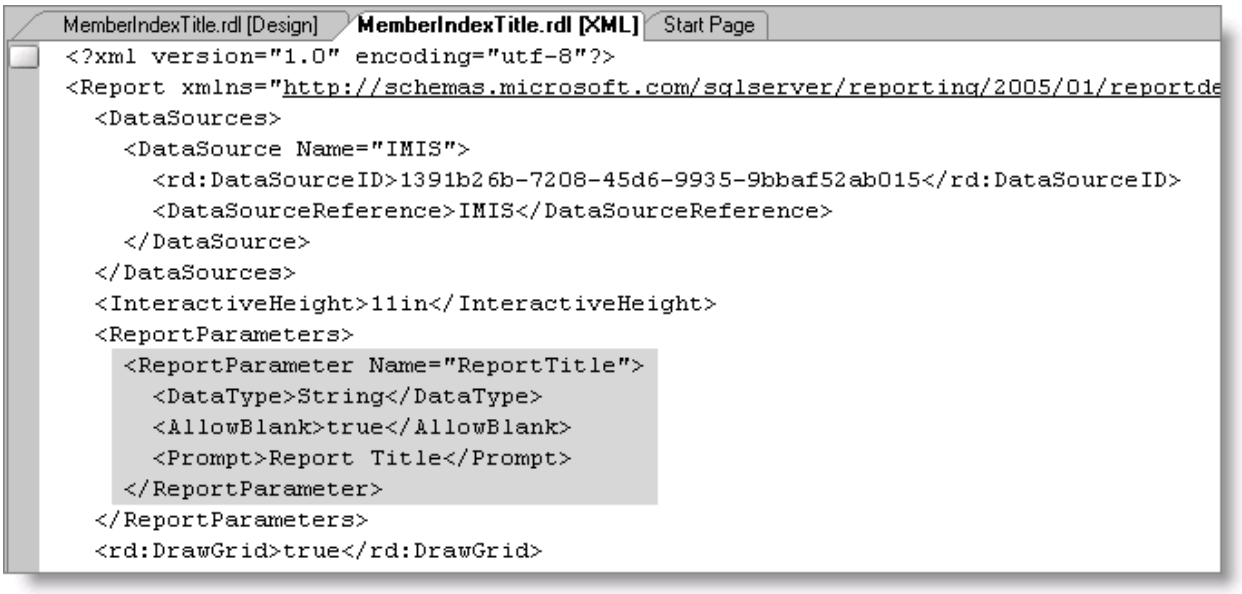
Making report titles editable at runtime

IQA adds a parameter to its SRSS reports to let users modify the report title at run-time, so that the title that displays on the report is changed just for that run. To prevent users from changing report titles at run-time, you just disable the Modify field at runtime check-box on the reports you save.



The availability of the Modify field at runtime option is controlled by report parameters in the .RDL.

If you create any RDL files outside of iMIS, you can give them this functionality by adding the ReportTitle parameter on the XML tab:



The "ReportTitle" parameter controls how users can affect the report's title, if at all.

Code for the ReportTitle parameter

<ReportParameters>

<ReportParameter Name="ReportTitle">

<DataType>String</DataType>

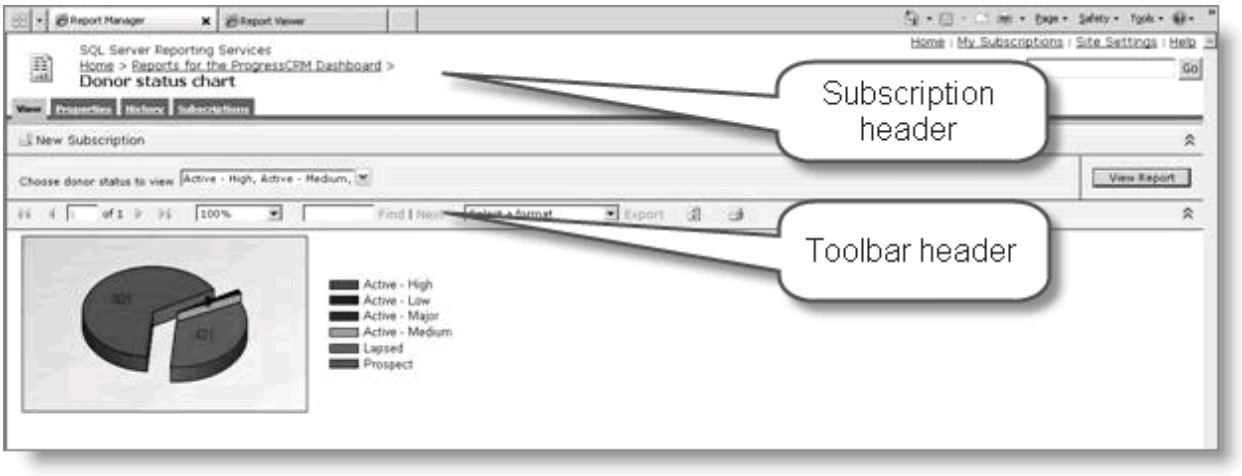
<AllowBlank>true</AllowBlank>

<Prompt>Report Title</Prompt>

</ReportParameter></ReportParameters>

Customizing headers in SSRS reports

By default, Reporting Services reports output with two headers. When these headers are not useful or take up too much space in the page design, you can control it by changing the URL through which the report is run.



SSRS reports include two headers, Subscription and Toolbar.

To suppress the Subscription header

When you publish a report, Report Manager generates a URL that includes the Subscription header:

http://-
loc-
alhost/Re-
ports/Pages/Re-
port.as-
px?ItemPath=%2fReports+for+the+ProgressCRM+Dashboard%2fDonor+status+chart

To run the report without the Subscription header, call a different command, formed like this:

http://-
loc-
alhost/re-
portserver-
?%2fRe-
ports+-
for+the+ProgressCRM+Dashboard%2fDonor+status+chart&rs:Command=Render

To suppress the Toolbar header

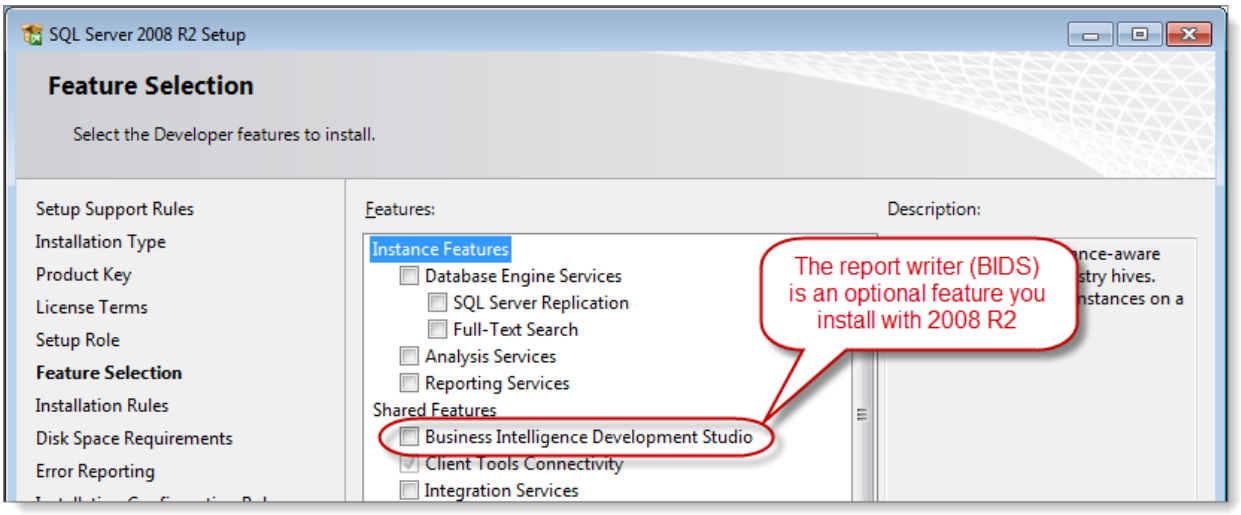
To run the report with the Toolbar header, which includes parameter and export options, add &rc:Toolbar=false to the end:

http://-
loc-
alhost/re-
portserver-
?%2fRe-
ports+-
for+the+Pro-
gressCRM+Dashboard%2fDonor+status+chart&rs:Command=Render&rc:Toolbar=false

Tutorial: Customizing a report template

This demonstration walks you through the entire process of creating a reporting project, getting a report template from iMIS, editing it to add a pie chart, and getting the template back into iMIS.

1. If needed, install the Business Intelligence Development Studio (BIDS) feature.



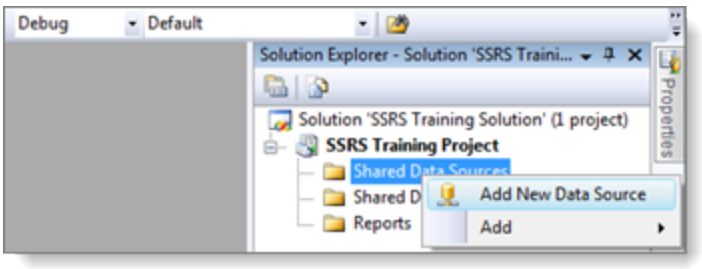
2. Open your report writer and create a new solution.

- Open BIDS: go to All Programs > Microsoft SQL Server 2008 R2 > SQL Server Business Intelligence Development Studio.

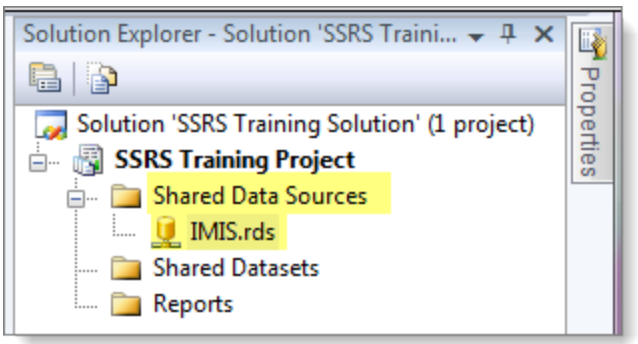
- Select File > New > Project.
- Select Report Server Project.
- (Project name) Name: SSRS Training Project
- (Default location) Location: C:\...\Visual Studio 2008\Projects
- Solution Name: SSRS Training Solution
- Click OK.

3. Add Shared Data Source called iMIS.

- Right-click the Shared Data Sources folder inside the SSRS Training Project within the Solution Explorer and select Add New Data Source.



- Name the Data Source IMIS so that it will work with the RDL that you will export from iMIS.
- Click Edit and add the connection information for your local database.
- Select Test Connection to verify that it works.
- Note the new connection within the Shared Data Sources folder.

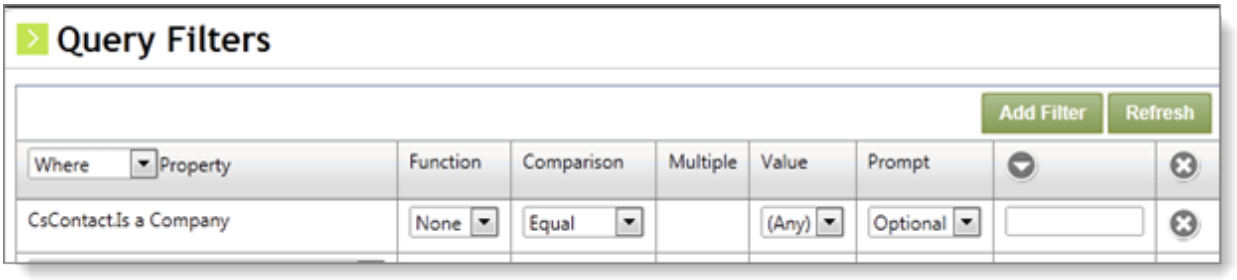


4. Create a data source and default report template (RDL) using IQA.

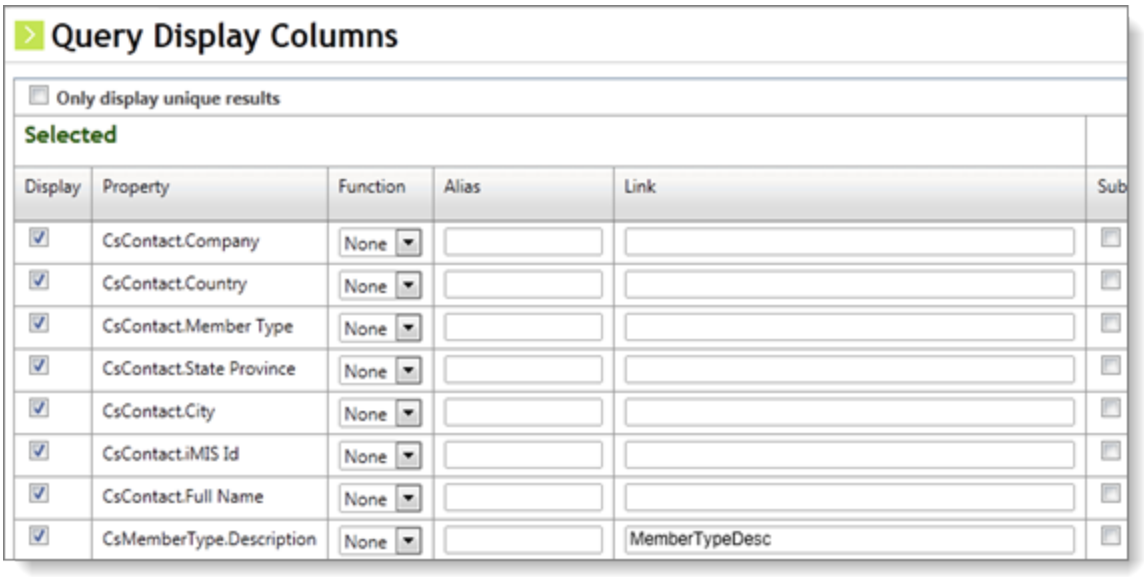
- Select Manage > Intelligent Query Architect.
- Browse to $/Samples/ReportingServices.
- Create a new IQA that grabs the data you need for your report.

  Sources: CsContact and CsMemberType business objects

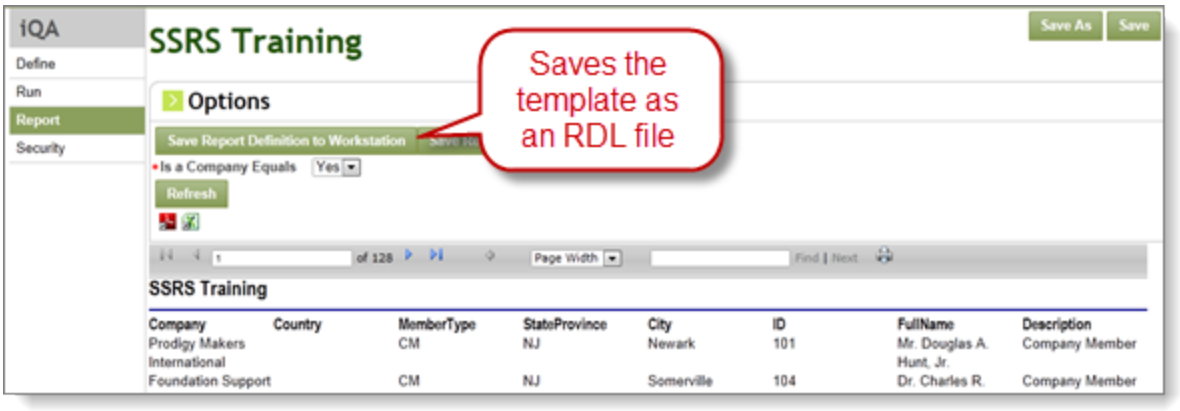
  Filters: CsContact.Is a Company



  Display: Defaults & CsMemberType.Description



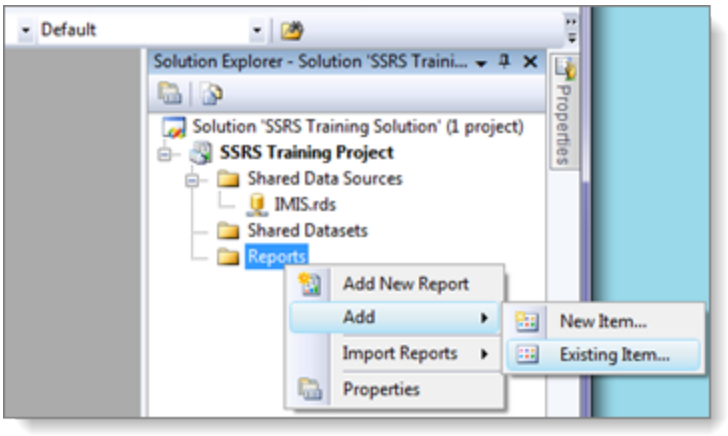
- Go to the Report tab and click Save Report Definition to Workstation to export the default RDL file to your workstation.



- Save the RDL to your project folder.

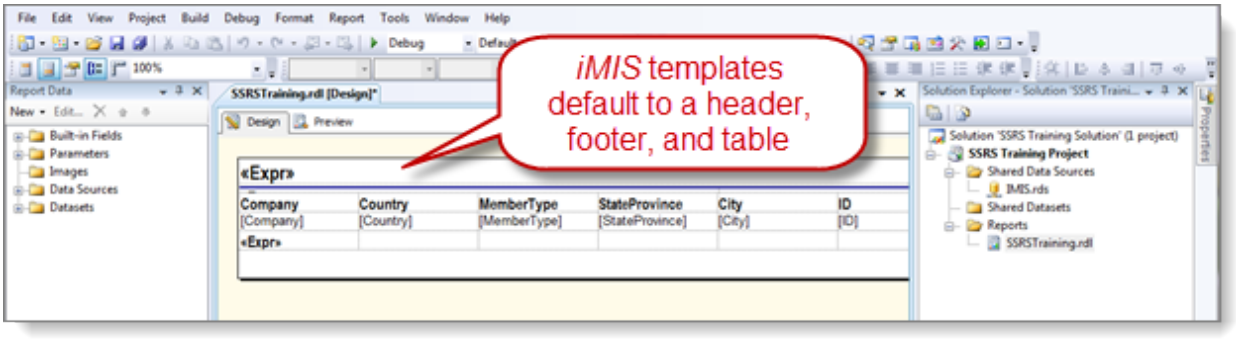
5. Add the exported template to your reporting project.

- Go back to BIDS and add the RDL to the Reports folder within the SSRS Training Project.
- Right-click Reports and select Add, Existing Item.



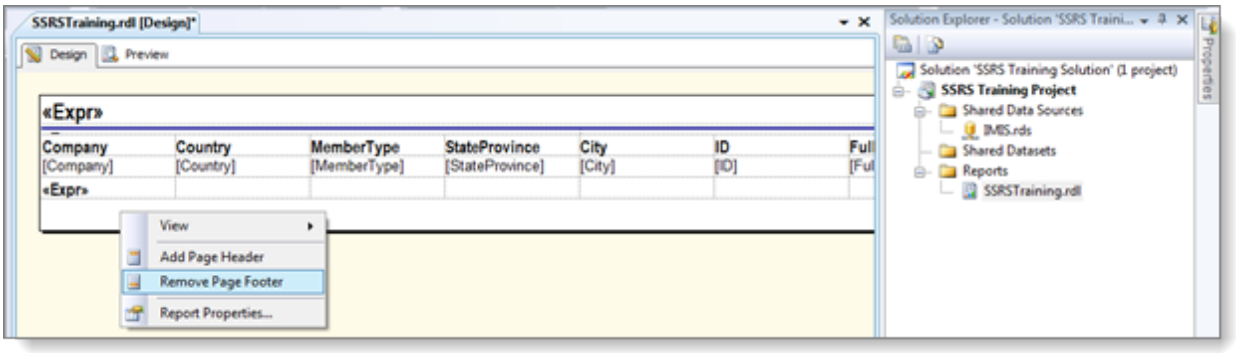
- Find the RDL you exported from IQA (note that name defaults to the name of the query).
- Double-click on the name of the report to open it for editing. You'll see the default template that IQA uses for all IQA report definitions which includes a header, a table to dis-

play the results set, and a footer.

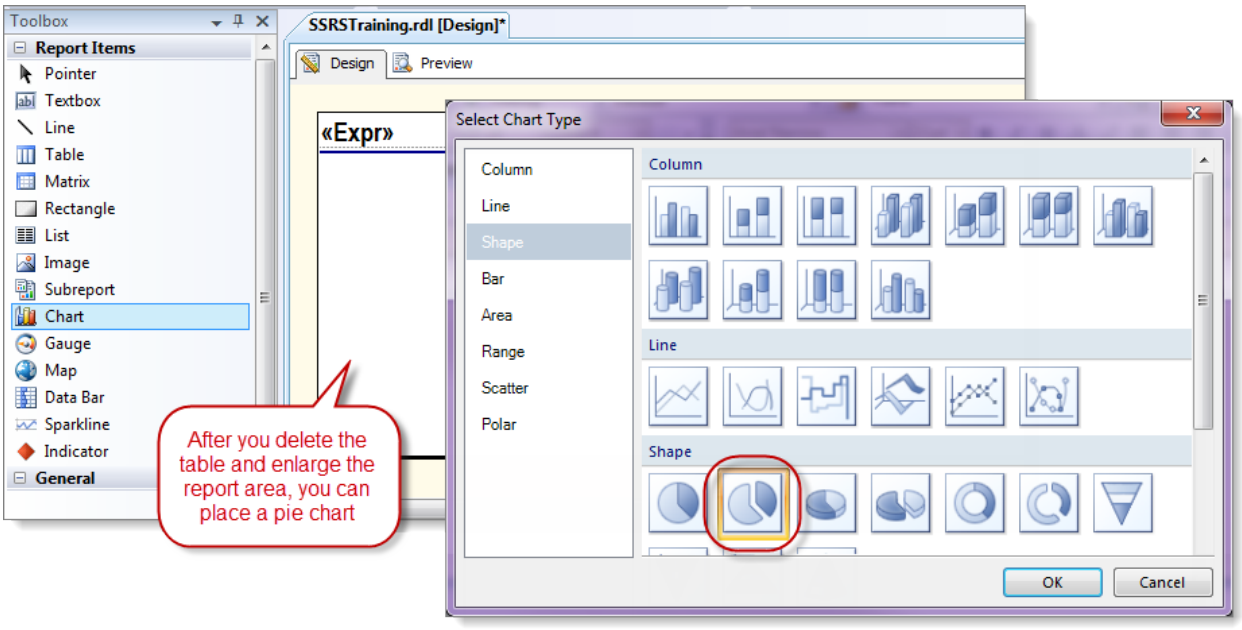


6. Change the report template into a pie chart that shows the percentage of members within a given member type.

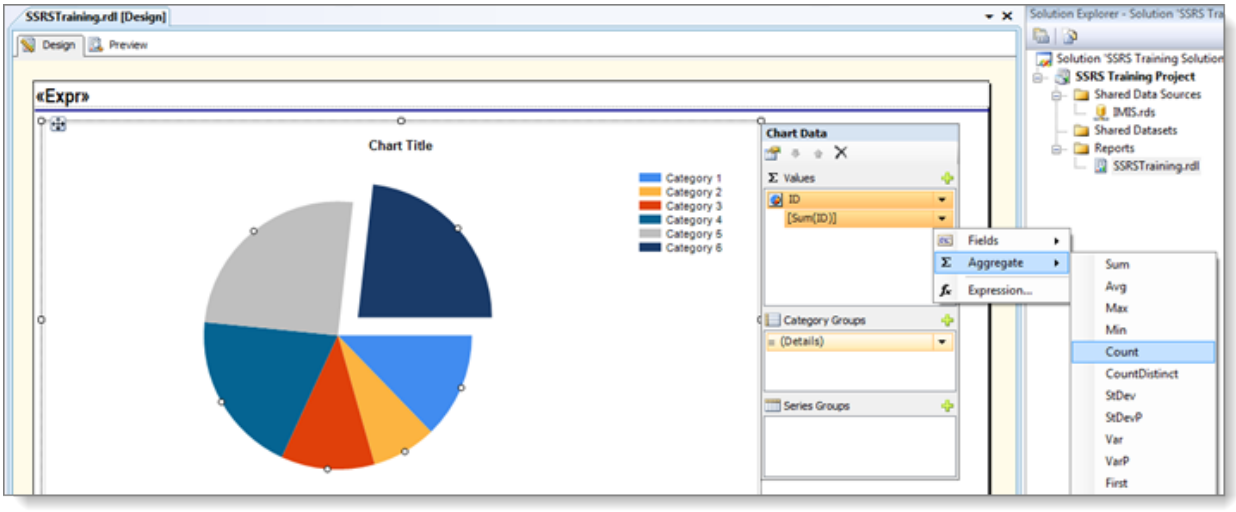
- Right-click on the footer and select Remove Page Footer.



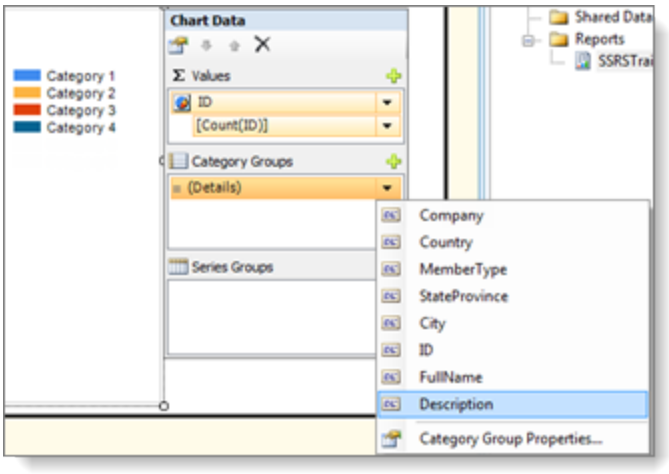
- Select the table, click the top left corner, and press the Delete button on your keyboard.
- Drag the bottom of the report to give yourself more room to add the chart.
- From the toolbox, drag and drop the Chart report item onto the body of the report.
- The Select Chart Type window opens.
- Select the exploded pie chart and click OK and expand the pie chart to fill in the area as needed.



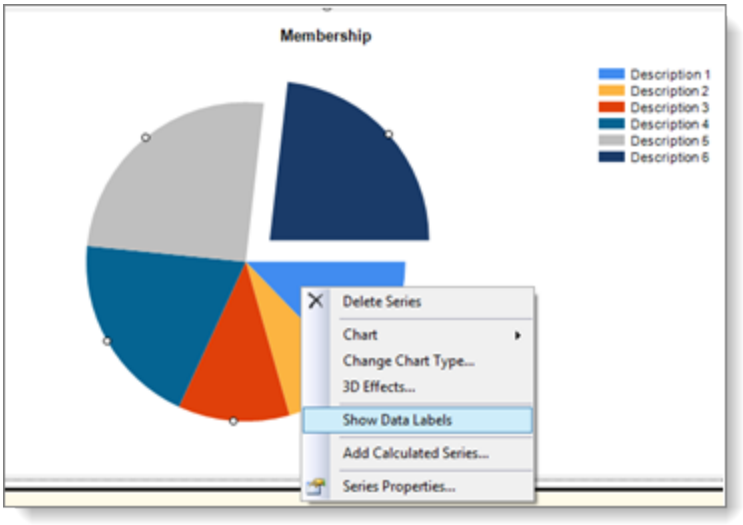
- Right-click on the chart itself to show its properties, which open in the Chart Data pane to the right of the chart.
- In the Value section, select ID.
- Change the Aggregate type from Sum to Count.



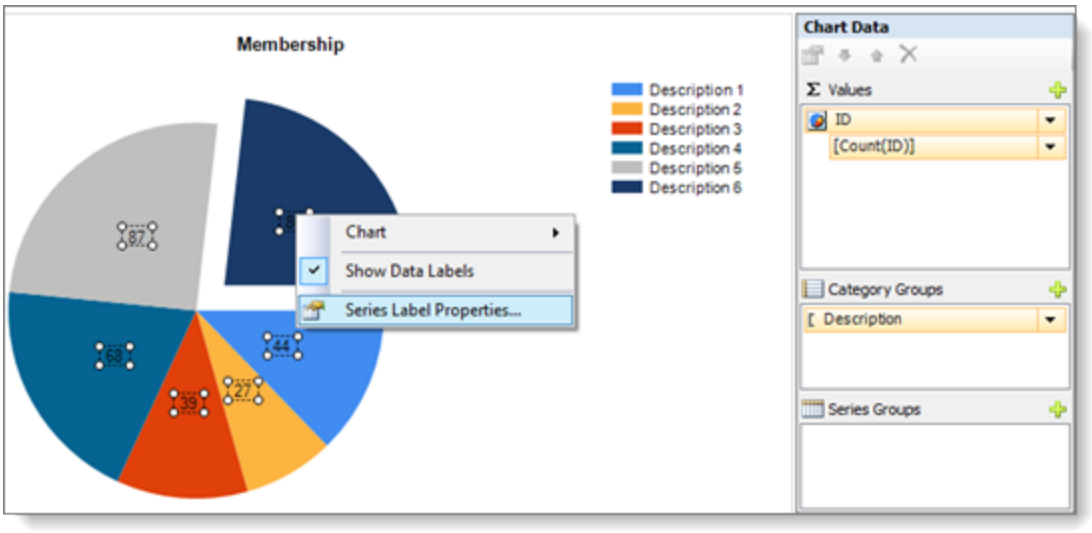
- In the Category Groups section, select Description (which is the Member Type Description).



- Change the title of the report by clicking the area that says Chart Title and typing.
- Add labels that show the counts-per-member type by right-clicking on the chart and selecting Show Data Labels.



- Click Preview to see the new report (there is a default parameter for the report title – click the View Report button on the top right to preview the report).
- Change the chart to show percentages instead of counts.
- Right-click on any of the labels in Design mode.
- Select Series Label Properties.



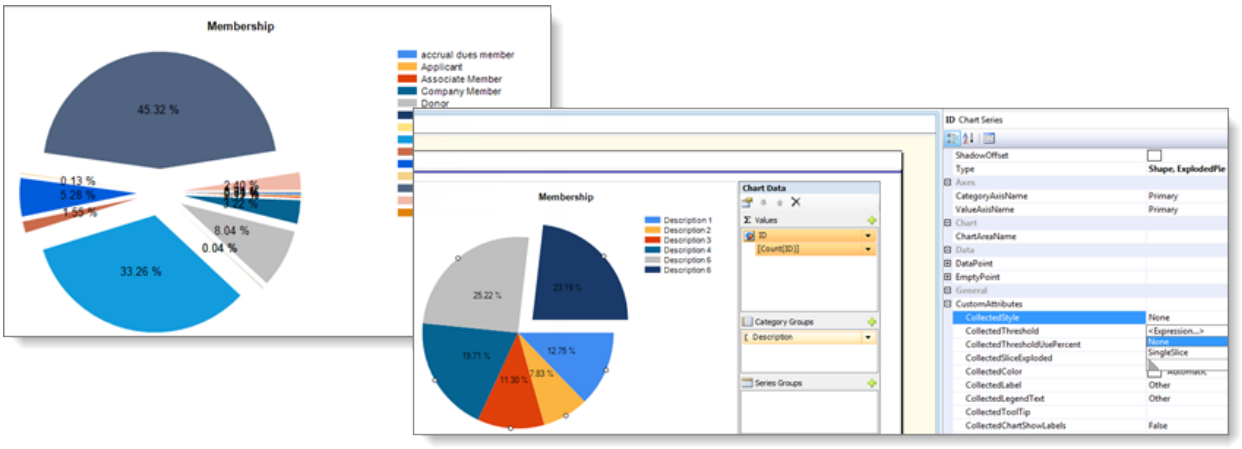
- Add #PERCENT to the Label data field so that the labels show the percent instead of the count.
- When prompted, This property will not have effect unless UseValueAsLabel is set to False. Do you want to set the UseValueAsLabel to False?, click Yes.
- Click OK.

7. Combine all member types that have less than 5% into one pie slice called Other.

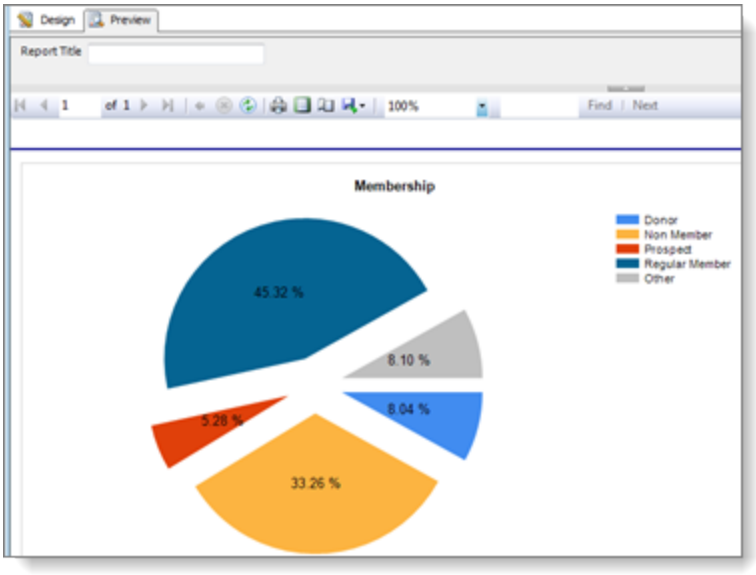
- Go back to the Design view by clicking the Design tab.
- If you do not see the chart properties, select View > Properties Window.
- Click a pie slice to select the chart area (you will see the Chart Data pane at right).
- On the Properties menu to combine all of the less than 5% member types:
- Find the General sub menu, double-click the CustomAttributes section, and find and set two properties:

  CollectedStyle = SingleSlice

  CollectedThreshhold = 5

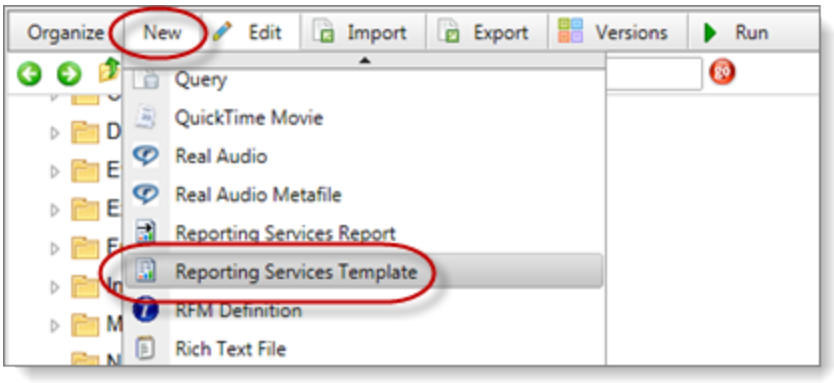


8. Preview, adjust as needed, and Save.

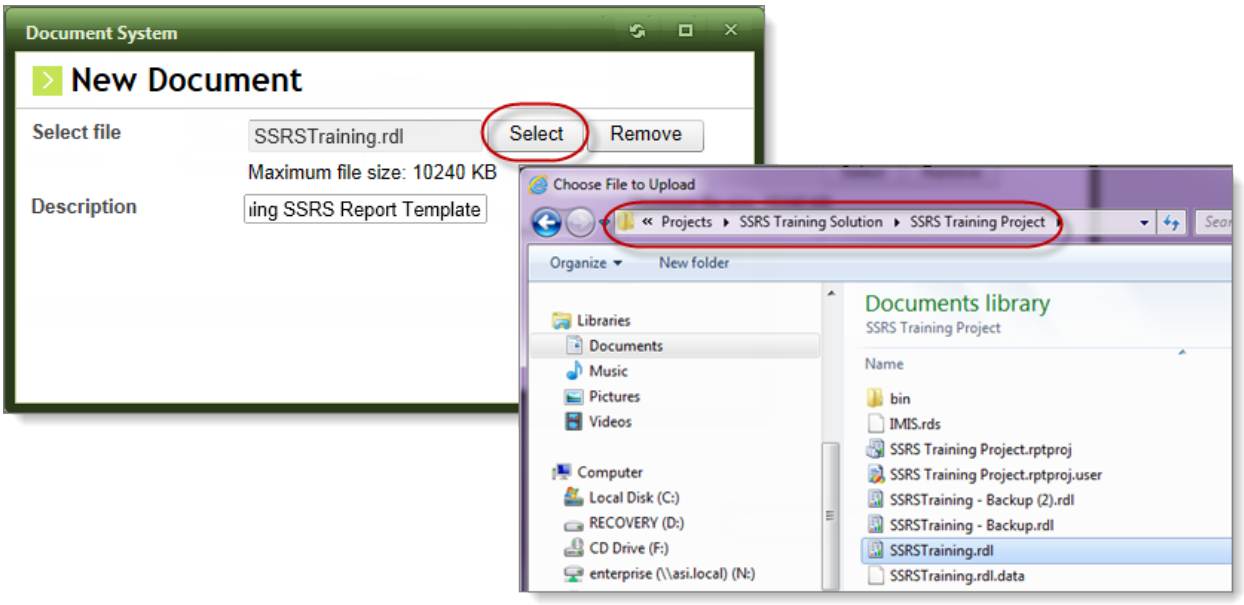


9. Add your template to your report in iMIS.

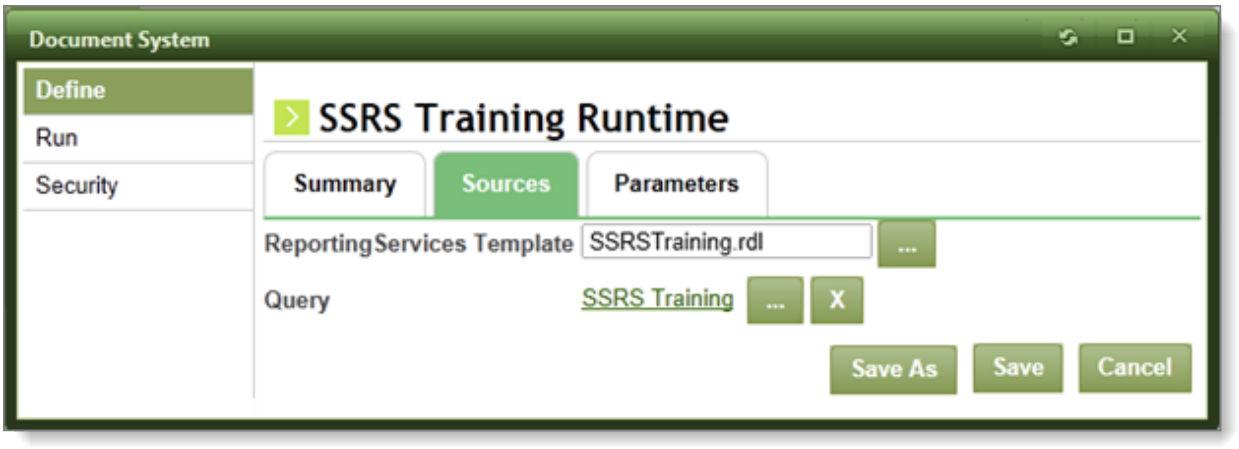
- On your Member site, open the Document System: select Manage > Document System.
- Browse to the location of the original template : $/Samples/ReportingServices.
- Bring your template into iMIS as a new object: select New > Reporting Services Template.



- Upload your RDL file: Click Select and browse to the file that you turned into a chart template: ..\Visual Studio 2008\Projects\SSRS Training Solution\SSRS Training Project.

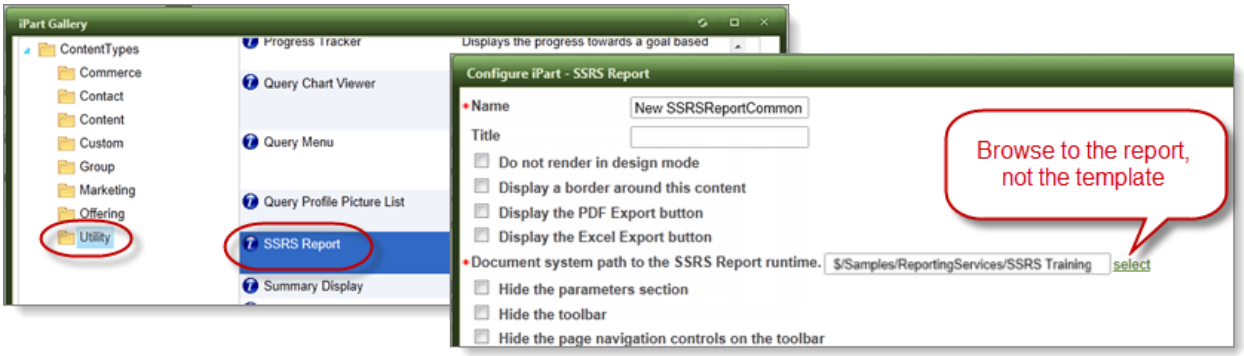


- Create a report runtime to use your template with your query: select New > Reporting Services Report.
- On the Sources tab, use the browse buttons to select your template and your query.

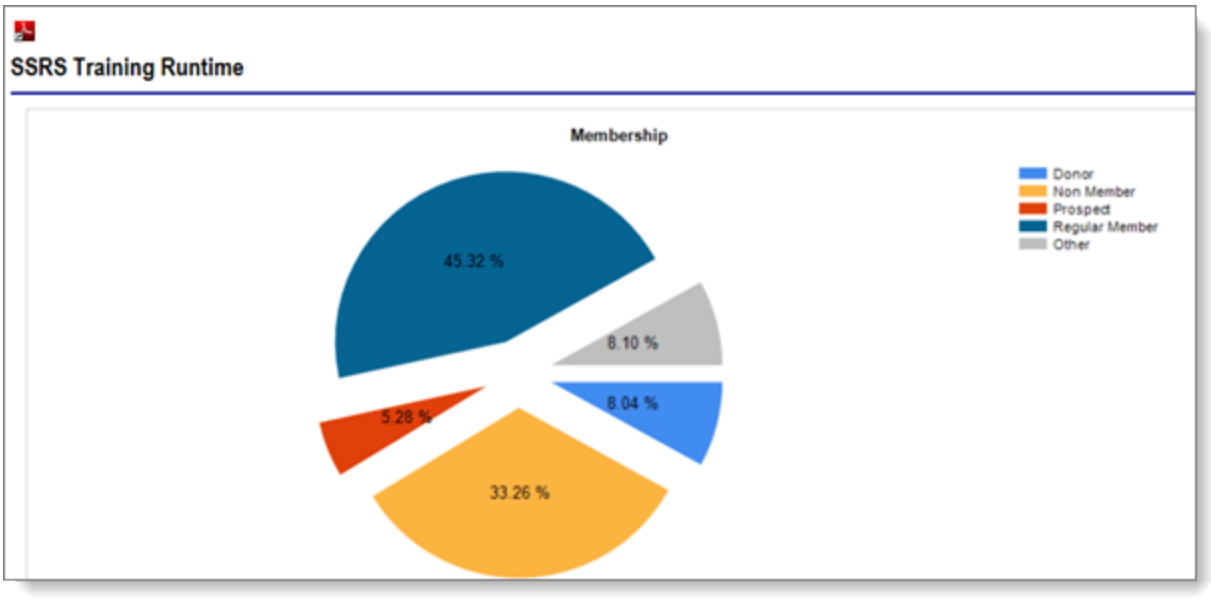


- Click Run to preview the report.
- When you Save the new report, verify the folder to which you are saving: $/Samples/ReportingServices.

10. Publish your report using the SSRS Report iPart.
    - Edit a new or existing content record.
    - Select add content and select the SSRS Report, in the Utility gallery.



- Select Hide the toolbar, since pagination isn't needed.
- Save & Publish, and view your report.


SSRS Training Runtime
Membership
Donor
Non Member
Prospect
Regular Member
Other
45.32 %
8.10 %
8.04 %
5.28 %
33.26 %

Creating content with iParts

iParts are the foundation of your iMIS sites that you build with RiSE. This section helps you to understand and master the critical iParts that present attractive and dynamic content to your users.

What are iParts?

An iPart is an iMIS-specific web part that represents a building block of features that you can place on a content record with other building blocks to create new pages of features. Multiple iParts can be combined and displayed in a content record as you prefer.

Default iParts appear throughout iMIS. You can modify them for your needs and you can reuse iParts throughout the system. For example, an iPart displaying a roster for a Membership Group can follow the same user behavior patterns as an iPart for a roster in Events.

Where can I find and use iParts?

To create a new web page containing one or more iParts

1. From RiSE > Content designer > Manage content, create a content record.
2. Click add content and select the desired iPart from the Content Gallery.
3. Enter the applicable information and select the desired options.
4. Click OK.
5. Click Preview to see how the content will be displayed to users.
6. Click Save and then Publish.
7. From RiSE > Site designer > Manage sitemaps, create new website navigation.

   Note: If no owner is specified for the content block, the default organization displays as the owner.
8. Click Publish.

To add an iPart to an existing webpage

All iMIS sample sites come pre-filled

1. From RiSE > Content Designer > Manage Content, select the site you'd like to add the iPart to.
2. Select the Content area in which you would like to place the new iPart.

   For example, if you would like to add a new iPart to the home page, select Home from the content area list.
3. Click Edit.
4. Determine where you would like to place your new iPart, and click add content.
5. The Content Gallery window will pop up. Navigate to the folder that contains your desired iPart.
6. Select the desired iPart and click OK.
7. Configure the iPart by entering applicable information and select the desired options.
8. Click OK.
9. Click Preview to see how the content will be displayed to users.
10. Click Save and then Publish.

To set up a user content area

User content areas are created by using iParts which can be configured to allow a user to post content on the web. Examples of this user-generated content include forums, message boards, or blogs.

1. From RiSE > Content designer > Manage content, create a content record.
2. Select the Content Block iPart from the Content Gallery.
3. Enter the applicable information and select the desired options. See the help file for details.
4. Click OK.

5. Add additional content to page, if desired.
6. Click Save.
7. Click Publish.
8. From RiSE > Site designer > Manage sitemaps, create a navigation.
9. Click Publish. The page displays as configured with an area dedicated to user content entry directly on the page.

Configuring iParts

iPart configuration allows you to:

- Define how the iPart will behave
- Control how much access you want end users to have
- Hide configuration details from end users; two instances of the same iPart with different configurations can appear as two different controls to the end user
- Examples:
- Allow users to edit on a staff-facing site, but display the data in read-only mode on a public-facing site
- Use multiple instances of an iPart on one page to access different sets of data

Run-time versus design-time

iParts have two different views:

- Design-time view: What you see in a content record when you add an iPart and configure it.
- Run-time view: What your end-user sees when viewing the iPart within your website. This may differ from what you see in the Design-time view, because some iParts have a different behavior after you publish the content.

Specifying commit sequence

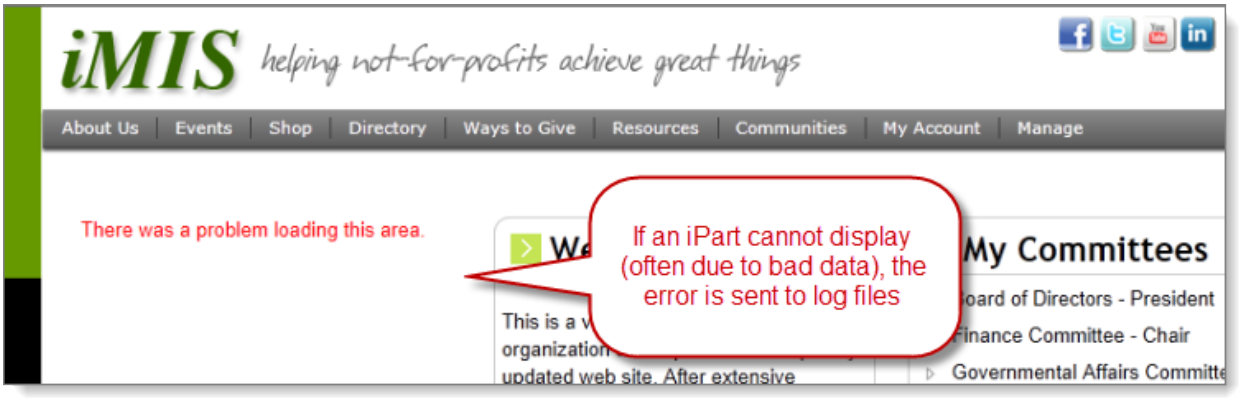
If you place more than one iPart on a page, you might need to specify the order in which actions occur on that page. The commit sequence function allows you to explicitly define the execution order of multiple iParts in a content record.

You can define a commit sequence value for the processing order of each iPart relative to the other iParts in the same content record. The commit sequence value must be zero or greater. iParts with a value of zero (the default) are processed after any other iParts with a non-zero commit sequence value that are in the same content record.

Setting a commit sequence is only required in a few scenarios and is noted in an iPart's configuration help if needed.

Troubleshooting iPart errors

Occasionally, an iPart may fail. However, it will fail gracefully in place, without disabling the whole page. Typically, a "problem loading" error results from some kind of bad data. By default, iMIS hides the error details:



The settings controlling this error logging reside in the <log4net> section of your site's web.config file. The default settings enable error logging in the Windows Event log and comprehensive logging in the ASI log file, which captures both errors and warnings. This log file, Asi.WebRoot.log, is in the folder above your website root.

Contact your hosting administrator if you need access to information in these logs.

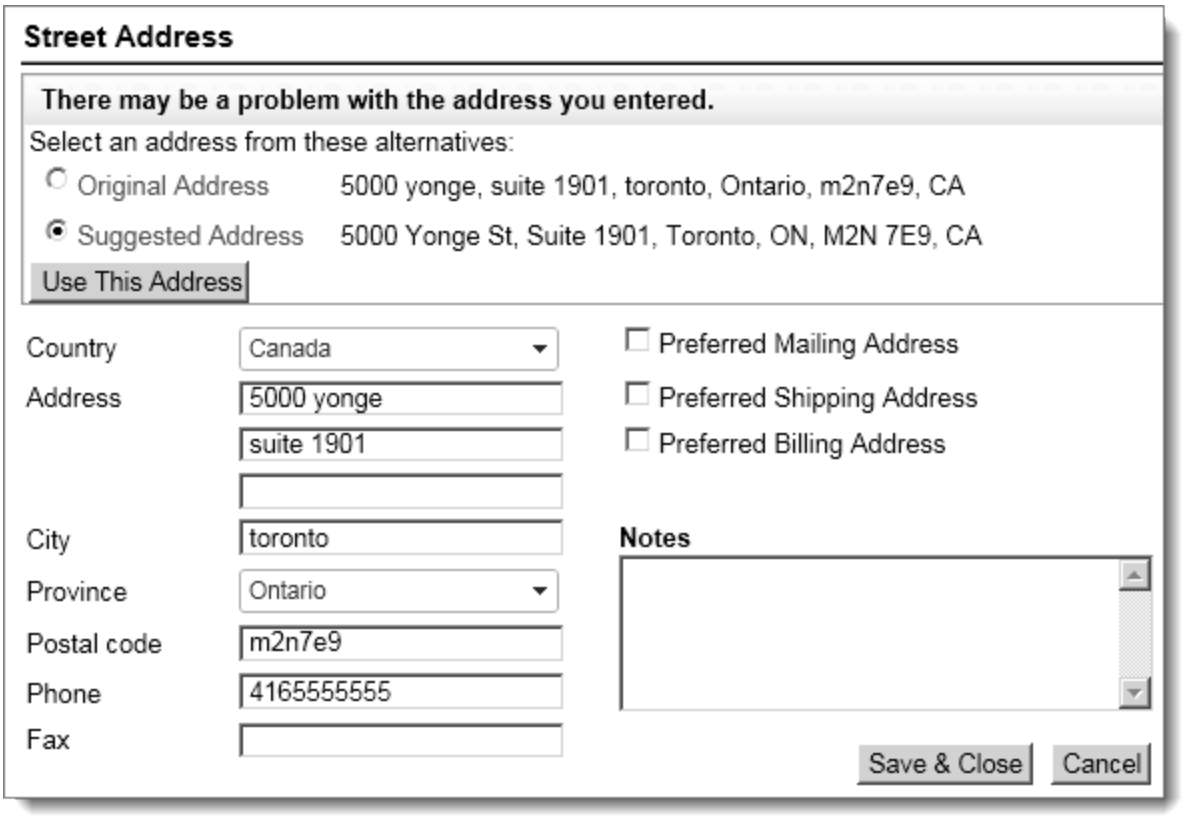
Security for iParts

Most security is defined at the content record level within iMIS. You can choose that different iParts display for different users. For example, an unauthorized user might see the description of a Special Interest Group, but a signed-in member might see the roster for the group and a staff person might have the privilege to add, edit, or delete the group.

Address verification for iParts

iMIS SOA can perform real-time address verification using web services hosted by ASI. There are several benefits to this:

- Running this verification through the ASI web service frees you from having to install and maintain these data files locally.
- Offloading verification to this service keeps it from adding to the processing load of your page.
- The services of different address providers can co-exist, making it possible to verify addresses across multiple countries.
- The service can support future verification of collections of addresses as well as single ones.
- Postal addresses entered in the Contact Account Creator and Contact Address Editor iParts automatically upload to this service that verifies and standardizes the address. Users can then either accept the suggested address or keep the original as it was entered.



The countries supported by this service are subject to change. Contact your AiSP to obtain an up-to-date list.

Passing URL Parameters

Many iParts allow you to change the content they display based on the value of a URL parameter. This gives you the freedom to create a single content record. This record can be reused and the display can be changed based on a value sent in a link to the page. For example, instead of creating a new content record for every event, you can reuse a single content record that displays different event information based on the EventKey value in the URL.

Parameter values are passed to iParts from a several types of sources:

- Search result links
- IQA query links
- Navigation items

- Relative links
- Absolute links

For any iPart that allows URL parameters to be passed, see the configuration help file for detailed instructions.

Tip: If multiple values are sent to a page for a single URL parameter, the first parameter value wins. For example, if the URL pointing to the Event Display iPart is http://my-org/Events/Event_Display.aspx?EventKey=SPR12&EventKey=FALL12, only the SPR12 event displays.

Note: URL parameters set by navigation items cannot be manually overridden in the URL. A user cannot change the parameter value in the URL to display different content.

iPart Examples

iParts can be used in a variety of ways, and in many different combinations to meet your organization's needs. This section contains examples of commonly used iParts and provides guidance in maximizing their benefits.

Displaying query results in iParts

The iParts described in this section use IQA queries to drive the data displayed to users. Each iPart provides a unique way to display the data.

Query Chart Viewer iPart

The Query Chart Viewer displays query results in a chart, which can be set to a range of sizes, skins, and chart types.

Designing queries for Query Chart Viewer

The Query Chart Viewer can render any existing query, but you will get the best results by following these guidelines on how to design queries specifically for use with this iPart:

- Queries: The queries you create for the iPart should be structured so that the results are appropriate for charting. For example, if you want the chart to display the total sales per salesperson, then the source query should be written using the Sum function in IQA.

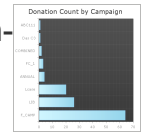
- Query Display Columns: Each property you select on the Display tab in IQA is available in the iPart's configuration page as a Data column display option. Note, however, that you can only select two properties to be displayed in the iPart.
- Aliases: In your source query, enter an Alias for the Display properties you plan to show in the iPart. Relying on the default labels may not be sufficient, especially when your query uses multiple joined sources or custom SQL expressions. If the query does not display as you expect, using an Alias often resolves the issue.
- Sorting: You can sort the query results displayed in your chart in ascending or descending order. To sort your results, edit your source query and, from the Sorting tab, add the property to be sorted.
- Labels: The labels on your chart's x-axis may overlap if there are too many data points or if the labels are too long. You may be able to improve the display through a few methods. In the iPart, you can expand the width of the chart or change the label angle. In the query, you can try to reduce the number of data points.
- Dates: For dates to display correctly, you must cast them as float data types with an offset of 2. You can do this in IQA from the Custom SQL Expression section of the (Display tab). For example, if you want to display the OrderDate property in your chart, add the following expression: CAST(OrderDate AS FLOAT) + 2. Then, when you select this property from the Data column list in your iPart, set the Data column format to a date format.
- Integers: If integers display incorrectly in your chart, cast the column to a data type of INT in the Custom SQL Expression section of IQA's Display tab. For example: CAST (OrderCount AS INT).

Chart Types

You can display the following types of charts in the Query Chart Viewer iPart.

Chart Type	Example
Area - Displays data in an area filled with color to illustrate trends. For example, create an area chart that shows a member's giving history over time. Note: You can only display one area of data in the iMIS Area chart.	

Bar - Horizontal - Displays sets of data with horizontal rectangular bars for comparison. For example, create a horizontal bar chart that shows the number of donations received by each of your fundraising campaigns.



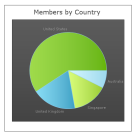
Bar - Vertical - Displays sets of data with vertical rectangular bars for comparison. For example, create a vertical bar chart that shows the distribution of your members across states.

Bubble - Displays data as a series of bubbles. For example, create a bubble chart to show the total number of function registrations for an upcoming conference.

Note: You cannot assign a size value to the bubbles in the iMIS Bubble chart.

Line - Displays data as a series of data points connected by a line to illustrate trends. For example, create a line chart that shows a member's giving history over time.

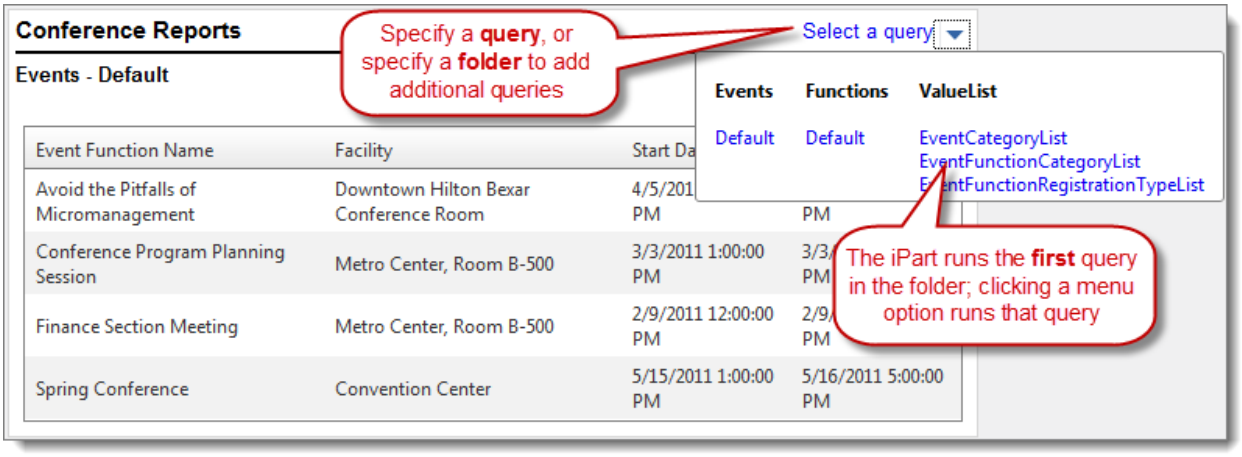
Pie - Displays data in a circular chart divided into sections to illustrate proportion. For example, create a pie chart that shows the proportions of your members by country.



Query Menu iPart

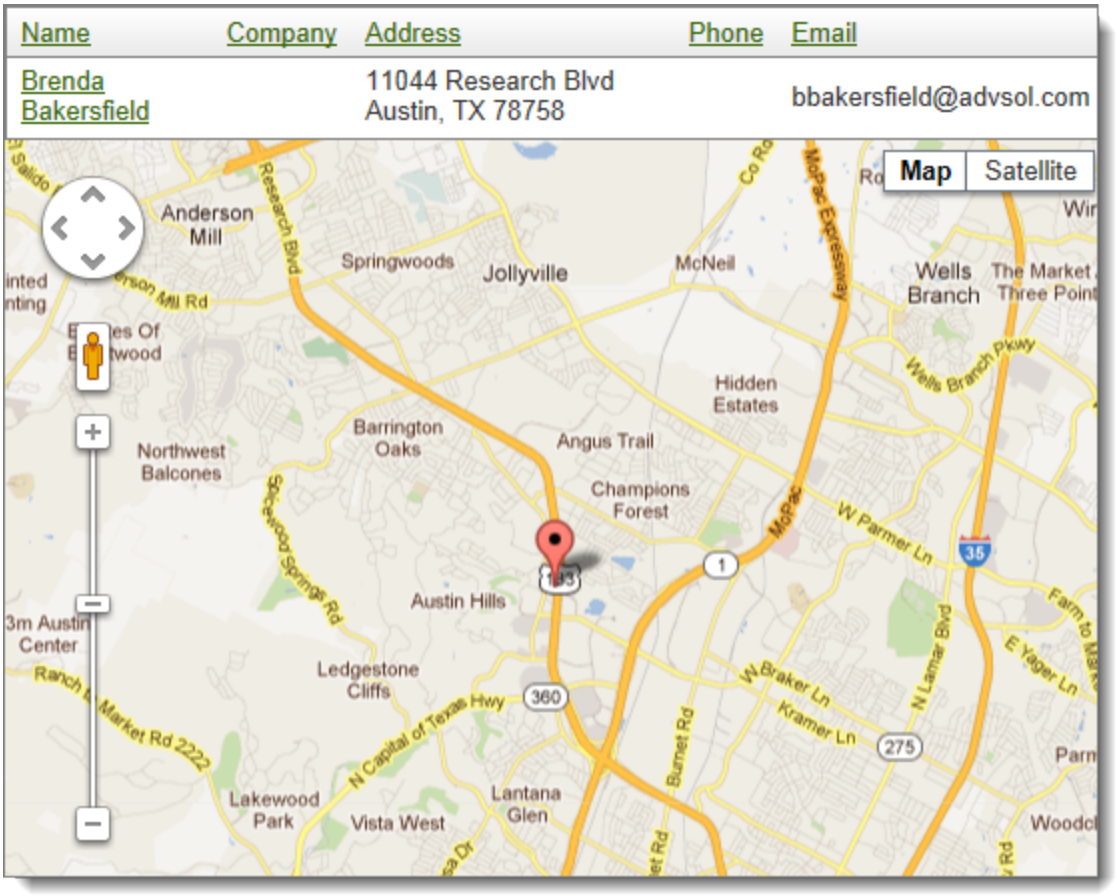
The Query Menu iPart lets you merge query results into your site for tremendous utility. You can set the iPart to display a query, set with whatever title, parameters, columns, labels, and sorting you need, and you can enable exports, which adds icons for sending the data to Word, Excel, PDF, and CSV.

You can also organize helpful queries into a folder and point the iPart to that folder. When the page loads, the iPart displays the first query at the top of that folder, and it presents a drop-down menu of additional queries available, organizing them by subfolders, if any. When the user clicks on a query from the menu, the iPart immediately runs that query and displays the results.



If the query selected contains an address property, you can configure the iPart to automatically map the query results when an address is available. Only one address property per query can be mapped. When this option is enabled, the iPart looks for the following

address properties in this order and maps the first one it finds: FullAddress, Address, FullAddressText, AddressText, Address Text, and Full Address Text.



Related Items iPart

With the Related Items iPart, you can display a list of profile or product pictures based on the results of an IQA query. For example, you can write a query to display the profile pictures of everyone who has registered for an event, made a donation, or ordered a particular product, or to display products in the same category. You can configure the list to display horizontally or vertically, to display a name for the item, and to choose the size of the image. You also have the option to make the profile picture a live link that opens a URL of your choosing, such as the member profile page.

Guidelines for working with the Related Items iPart

- The pictures displayed in the iPart are based on iMIS product or contact IDs. When creating the query for this iPart in IQA, you must select a property that returns an iMIS product or contact ID on the (Display tab). Give this property an Alias of key_Id (the Alias is case sensitive).
- To define the image to display for each record, include a column in your query that specifies the image file name for that record. Give this property an Alias of Image.
- To display a name for each record, include a column in your query for the name of the item or contact. Give this property an Alias of Name.
- When you add Display columns to the query in IQA, they become available within the iPart as Filter columns to filter on.
- You can dynamically filter the query results displayed in the iPart based on the value of another iPart's URL parameter. For example, you can set up your donation page to display the profile pictures of people that have donated to a particular cause (called a distribution in iMIS). The Donation Creator iPart uses the URL parameter itemid to determine which distribution the donation should go towards. If you add your iPart to the same content record as the Donation Creator, then you can set up the Related Items iPart to look at the value of itemid to determine which profile pictures to display. You just have to make sure that your query includes the CsActivity.Product Code property, so that you can select it as a Filter column on the iPart's configuration page. Once selected, enter itemid for the Filter on URL parameter, so that the iPart knows to filter the results based on that URL parameter's value.

  Example: Display other products in the same category

  In this example, the Related Items iPart is set up to display clickable images for other products in the same category as a particular product. This example uses content installed for the sample Member site.

  Go to Content Designer > Manage Content:

1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > RelatedItems. Select RelatedProducts.
4. Filter Options dropdown, select ProductCategory. ProductClassKey.
5. Filter on URL parameter, type in Category.Class.
6. For the Items link to (URL or shortcut), type in ItemDetail?iProductCode={key_Id}&Category={ProductCategory}.ItemDetail?iProductID={key_Id}&Class={ProductClassKey}. This uses the ItemDetail shortcut to link each item in the list to the product page. The particular item's product ID and category are specified in URL parameters so that the correct product and related products are displayed in the resulting product page.
7. Click Save & Publish to complete the content record.

Example: Display other users who have purchased a product

In this example, the Related Items iPart is set up to display clickable profile pictures of other users who have bought a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

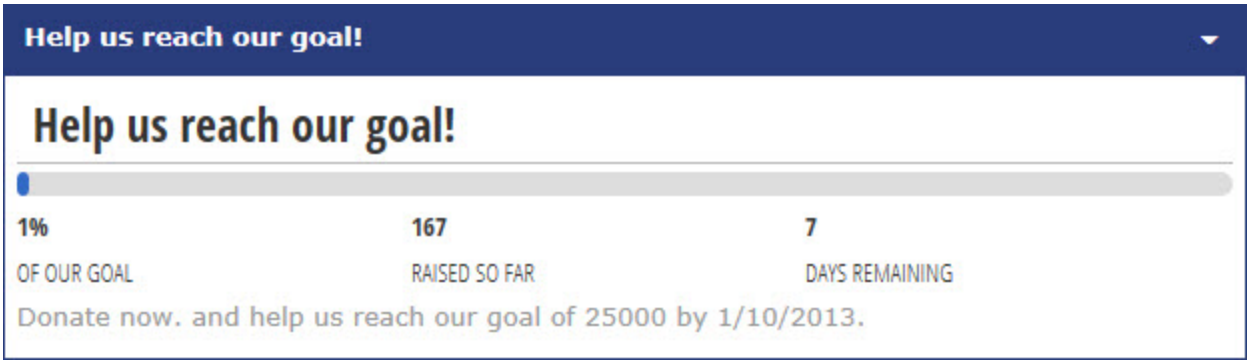
1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Content Types > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > QueryProfilePictureList. Select Orders.
4. Filter column dropdown, select ProductCode.
5. Filter on URL parameter, type in iProductCode. iProductID.
6. For the Items link to (URL or shortcut), type in MBR/Party.aspx. This redirector web page looks for an ID in the URL parameter and then checks the ID's party type and the user's permissions to determine which content record to display. The user's ID is appended to any URL specified in this field.
7. Click Save & Publish to complete the content record.

Progress Tracker iPart

With the Progress Tracker iPart, you can visually display progress towards a goal based on the results of an IQA query. For example, connect this iPart to a fundraising query, so that your members can easily track the progress of a fundraising effort towards a specific goal. Or connect it to an events query, so that you can see at a glance how many people have registered for an event.



To set up the Progress Tracker

1. Create a query for the Progress Tracker.

   Note: For sample queries that will work with this iPart, see $/Samples/ProgressTracker/ in IQA.

The Progress Tracker uses three pieces of information supplied by an IQA query: a goal amount, the sum total of what you are tracking, and the end date (which is optional). When you build your query for this iPart, it must contain specific aliases. In IQA, create a new query and choose the business object you want to query on. Make sure you are in Advanced Mode, then from the Display tab, choose properties to assign the following aliases to:

- Goal_Amount: Indicates which property is the goal amount. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST(25000 AS INT) as a property to set the goal amount to 25,000.
- Sum_Total: Indicates which property is the amount to be summed. The percentage displayed in the Progress Tracker is based on this amount compared to the goal. It can be a monetary amount or any other number, such as the number of event registrations.

  Tip: From the Function dropdown list for this property, select Sum, so that only one row is sent to the iPart. This is not required, but it will improve performance.
- End_Date: Indicates which property specifies the end date. This alias is only required if you want to display an end date in the iPart. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST('2012-12-25' AS DATE) as a property to set the end date to 25 December, 2012.

2. Add the iPart to a content record and configure it.

   Go to RiSE > Content designer > Manage content:

1. Do one of the following:

- Select a Content Folder and click Edit.
- Select New > Website Content.

2. Click add content.
3. Go to ContentTypes > Utility.
4. Select Progress Tracker.
5. Click OK.

6. Enter the iPart CSS class to style the Progress Tracker. Two styles have been pre-defined that you can use in the iPart: ProgressTracker and ProgressTracker2. You can edit these classes to change the look and feel, or you can create your own style for the Progress Tracker.
7. Select a Source query.
8. (optional) Select a data column by which you want to filter. You can use this feature to dynamically update your Progress Tracker, based on the value passed to it in the URL. If you choose to filter on a data column, then also enter the name of the URL parameter, which the iPart uses to identify the value to filter on. For example, to limit the results of an event query to a specific event, you can select the EventCode property and give the URL parameter a name such as EventCode. The progress displayed will then reflect only the event code which is included in the URL as EventCode=[EventCodeValue].
9. (optional) Enter any messages you want to appear in the iPart. The variables below can be used in the descriptions. For example, "Help us reach our goal of {0} new members by {2}!"
   - {0} displays the goal total
   - {1} displays the current sum total or count
   - {2} displays the end date in a long format
   - {3} displays the end date in a short format
10. Select the Caption Options. In addition to the progress bar, you can also display the values as text. If any of the Caption Options are unavailable after selecting a query, this indicates that the required aliases have not been defined in the query.
11. Select the Progress bar location. The bar can be displayed above or below the captions.

    Note: You can also use this iPart to display only a countdown (days remaining to a certain date). In configuration, only select the caption option Display days remaining, then for the Progress bar location, select (None).
12. Click OK.

SSRS Report iPart

The SSRS Report iPart lets you display the results of any IQA query on any page where you place it. The SSRS iPart uses the version 10.0 ReportViewer, which supports IE8 natively and, in IE8, adds a Print button on its toolbar. You can add the SSRS iPart to any content page using CM: open the Utility folder and choose the content type SSRS Report.

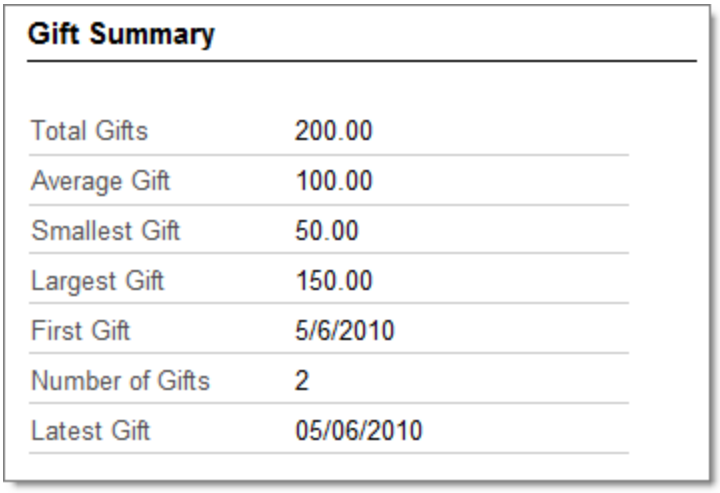
The iPart lets you customize whether to display the export buttons for PDF and Excel versions of the report. You can change the default design (layout, colors, fonts) of your reports by editing the SSRS parameters in the SystemConfig table.

How it works: The process engine specified by the iPart loads a report template (.RDL file) from the document system and creates a report data source (a DataTable) based on an IQA query's SQL source; the report viewer then combines the template and query to generate the report's output. When you configure the iPart, you specify the Document system path to the SSRS Report runtime, which must be a link to an SSRS Process Engine. Click the select link next to the textbox, then browse to your reports (such as $/Samples/ReportingServices), and pick one of the runtime entries.

Tip: Identify a process engine (run-time report) by the arrow on its icon!

Summary Display iPart

The Summary Display iPart displays a single row of query results in a form view.



Gift Summary

Total Gifts	200.00
Average Gift	100.00
Smallest Gift	50.00
Largest Gift	150.00
First Gift	5/6/2010
Number of Gifts	2
Latest Gift	05/06/2010

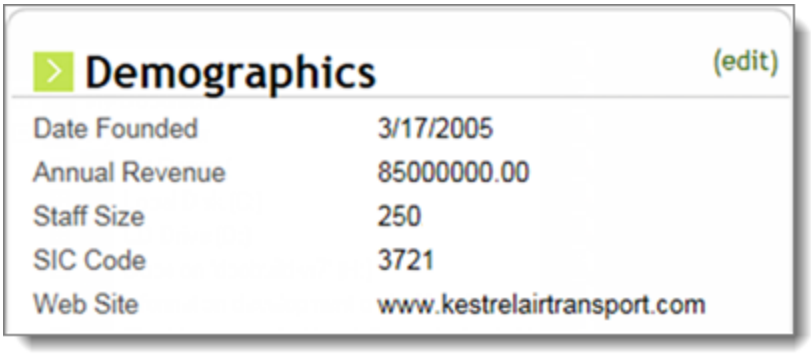
Guidelines for queries displayed in the Summary Display iPart

When creating a query that you want to display in the Summary Display iPart, keep the following guidelines in mind:

- This iPart only displays a single row of query results.
- If you connect the iPart to a query that returns more than one row of results, only the first row is displayed.
- Tip: You can dynamically filter your query results by the currently logged in user, a selected contact, or a date. See Adding dynamic filters to queries for more information.

Panels and custom data

Panels are custom displays of iMIS data that you are able to name, build, arrange in grids, and add to your site. Using panels, your users can browse, edit, add, and delete their data, as you specify:



Panels display within Panel iParts, which allows your users view and edit custom data on the broadest range of browser and platform types that iMIS supports. You can manage your custom data directly and conveniently from the web pages where you place these iParts:

- Panel Editor (which creates panels and shows one panel) --
- Panel Collection Editor (which combines existing panels into tabbed displays)

You can configure the iParts to let your users add and edit that data directly from their browser page. You can import your existing user-defined tables (from iMIS Customizer) directly from the Panel Editor iPart configuration. In addition, your Activity table data is

automatically available as a source, so that you can use and extend that data. Panel sources can include existing user-defined tables (defined in the UD_Table table) and user-defined sources (listed in the ObjectMetaData table).

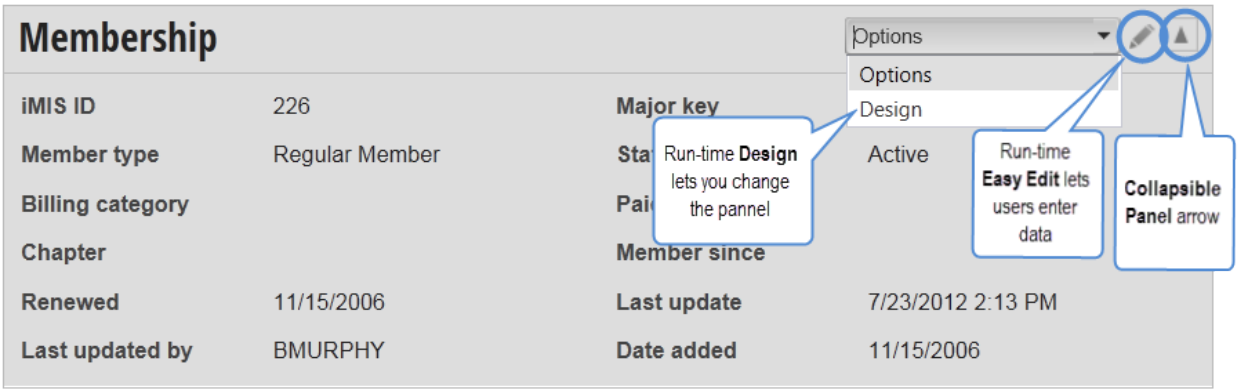
Tip: Panels are shared: when you update one panel, it updates within every iPart that uses it.

Creating custom panels of data

In a few clicks from your browser, you can have a new panel that displays the data you want, labeled and made editable as you need.

1. Enable Easy Edit by clicking on the button at the top right hand corner of the screen.
2. Once Easy Edit has been enabled, you will find and click the icon at the bottom left corner; this is the Content Designer.
3. From the Content Designer, click add content > ContentTypes > Content > Panel Editor
4. Select (New Panel) from the Panel drop-down menu.
5. Drag in and arrange your desired data, then Save & Publish.

   Once you have placed a panel iPart into a content record and published it, you can then edit the panel directly: As a system administrator, you see a run-time Design command, which lets you make quick changes to the panel, changes that save and publish for you automatically. For extensive panel work, such as to change the type of data it shows, use Easy Edit to access all of the content design features.



Best practices for panel layout

Here are key layout features to help you design the best use of screen real estate on the page:

- Multiple columns: Click + or – icons next to the panel layout to add/remove columns in your panel. For best display results, place multi-column panels into single-column content records.
- Hide in Summary View: Check this box on certain properties to trim the initial display of the iPart to the read-only information that is most useful. Only when users open the full window for viewing or adding/editing (as you configured it) do they see the additional information.
- Read-only: Check this box to provide information in read-only form while still allowing users to edit other information on the panel.

  Tip: To prevent editing of all of the properties, simply disable Allow users to edit on the iPart Configuration, rather than in the Panel definition.
- Collapsible panel: In order to maximize utility and minimize scrolling on the page, users are able to click on the arrow to expand and collapse iParts.

  Tip: Be sure to add an optional Title to any iPart that you make collapsible, so that title bar text guides your users as to what information they will access by clicking Show.

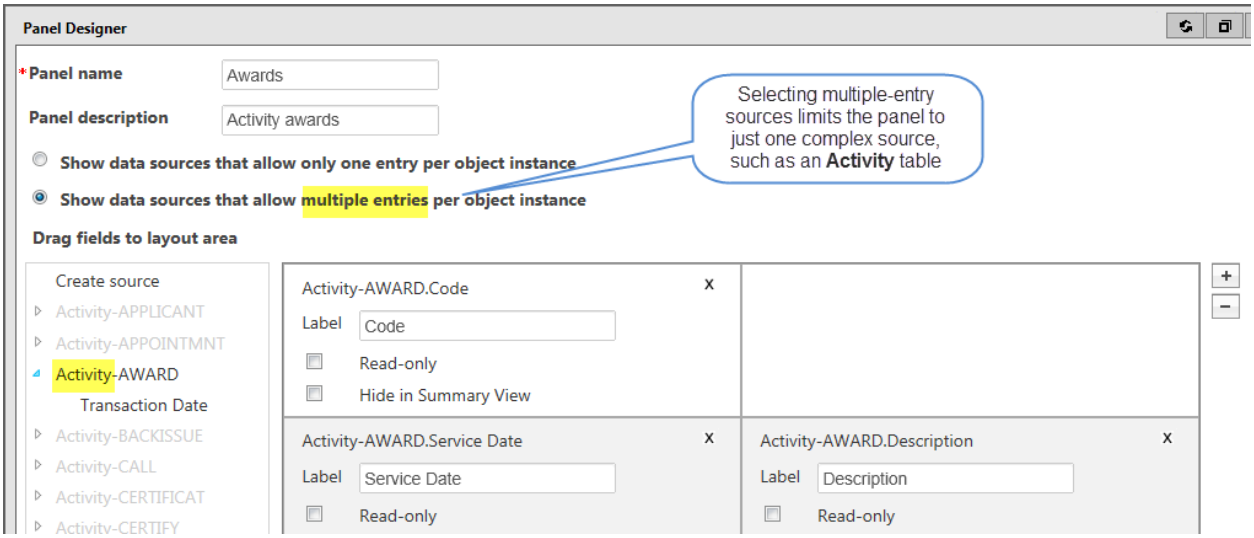
  Panels for Activity data

  Most organizations need to show activity information on their websites. All of the Activity data in your iMIS database appears as complex (multi-entry) sources when you use Panels.

  Suppose you created new award types in the general lookup table called AWARDS and want to add them to a page for dynamic editing. In a few clicks, you can have exactly that:

1. Enable surf-to-edit.
2. Click add content.
3. Go to ContentTypes > Panel Editor.

4. Click OK.
5. In the Panel list, select (New panel).
6. Select Show data sources that allow multiple entries per object instance.
7. Drag in your new data sources.
8. Click Save & Close.
9. Select Allow users to edit.
10. Click OK.
11. Click Save & Publish.



All of your Activity data appears as available sources when you select multiple entries for the type of data source.

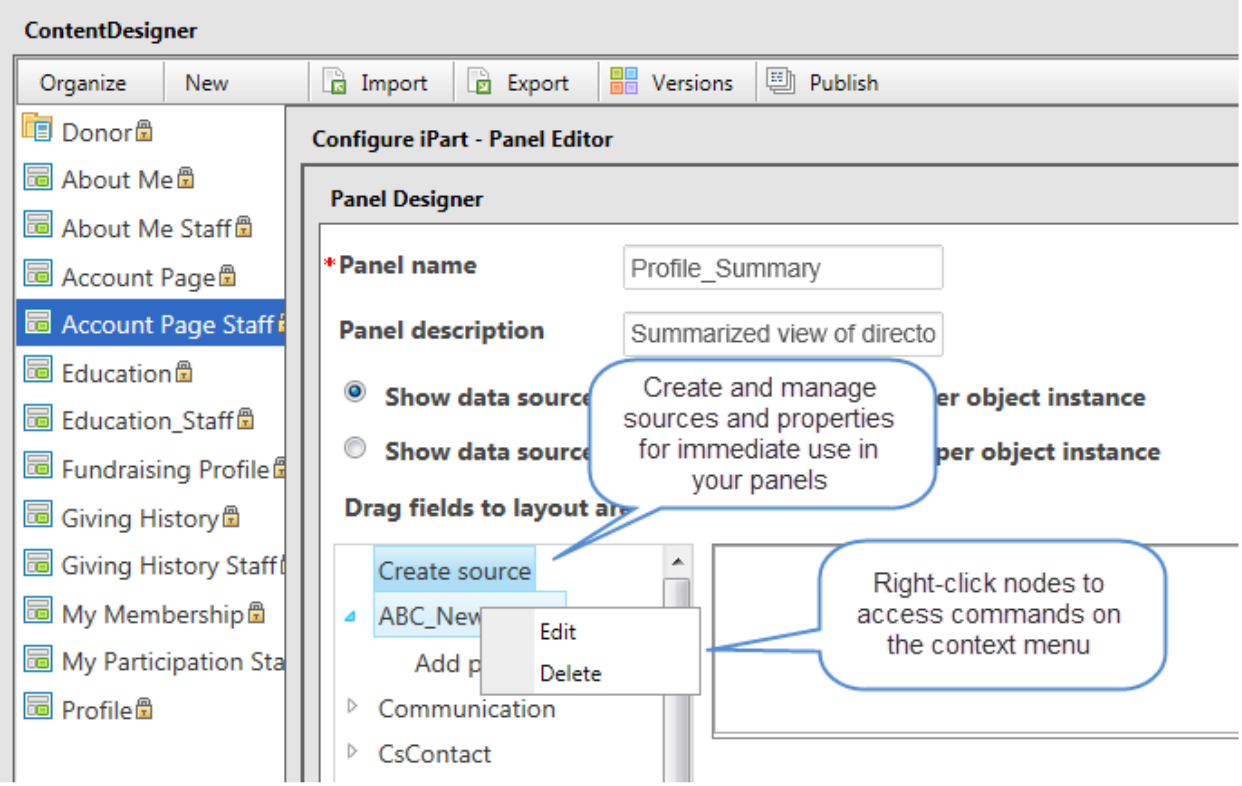
Tip: If you want to combine data from different sources, be sure to show simple sources (the first radio button option). Only one complex table can display in a panel, so the others are grayed out as long as any one of them has properties placed in the panel.

Defining your own data with Panel Designer

With the Panel Designer, you can not only craft reusable panels that combine fields from many tables, but you can also define new data structures (business objects and

properties) to manage information for your organization. Without special tools or knowledge of the iMIS schema, you can add data sources on the fly, right from your browser. When you save the panel, you have saved your newly created data sources as iMIS business objects.

Tip: You can see your new data source show up as a business object in Business Object Designer, but it will be read-only: continue to edit and manage these special sources in Panel Designer itself.



Access the Panel Designer by editing or creating a panel in a Panel Editor iPart.

To create a new panel source and properties

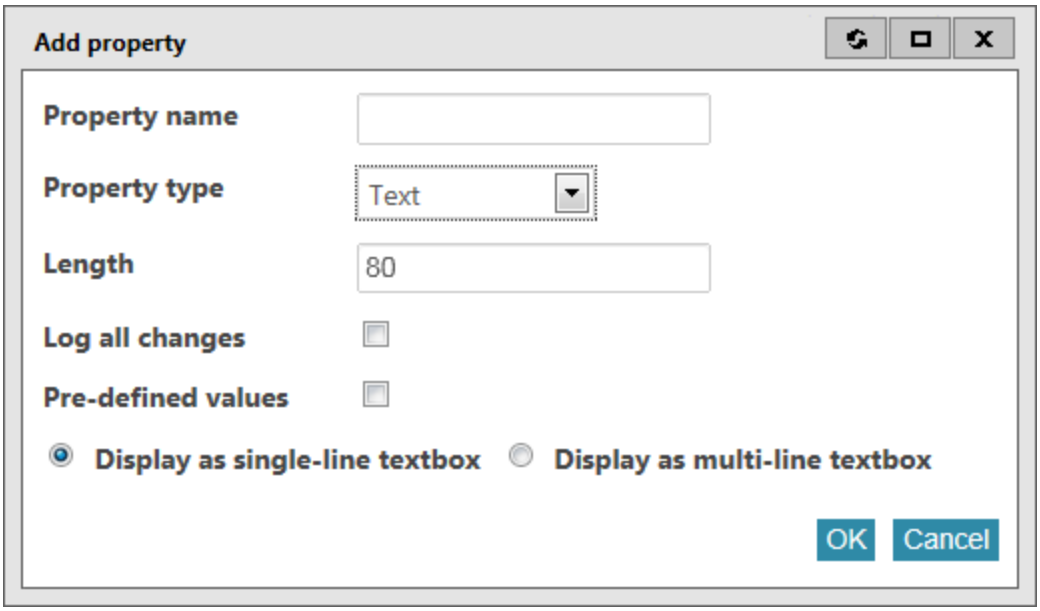
To create your own data source with properties, you work within Panel Designer. Each new source you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

1. Select New > Website Content.
2. Click add content.
3. Go to ContentTypes > Content.
4. Select Panel Editor.
5. Click OK.
6. From the Panel drop-down list, select (New panel).
7. At the top of the source tree, select Create Source.
8. Choose a Name for each new Source that meets these criteria and click OK:

- Starts with a letter
- Contains only letters, numbers, and underscores
- Is unique across iMIS, not matching any existing iMIS data or SQL Reserved Words

  Tip: Use an organizational prefix (such as ABC_*) so that your sources are unique, sort together in the tree view, and are easy to identify as ones that you created.

9. Select Add Property for the new source added.



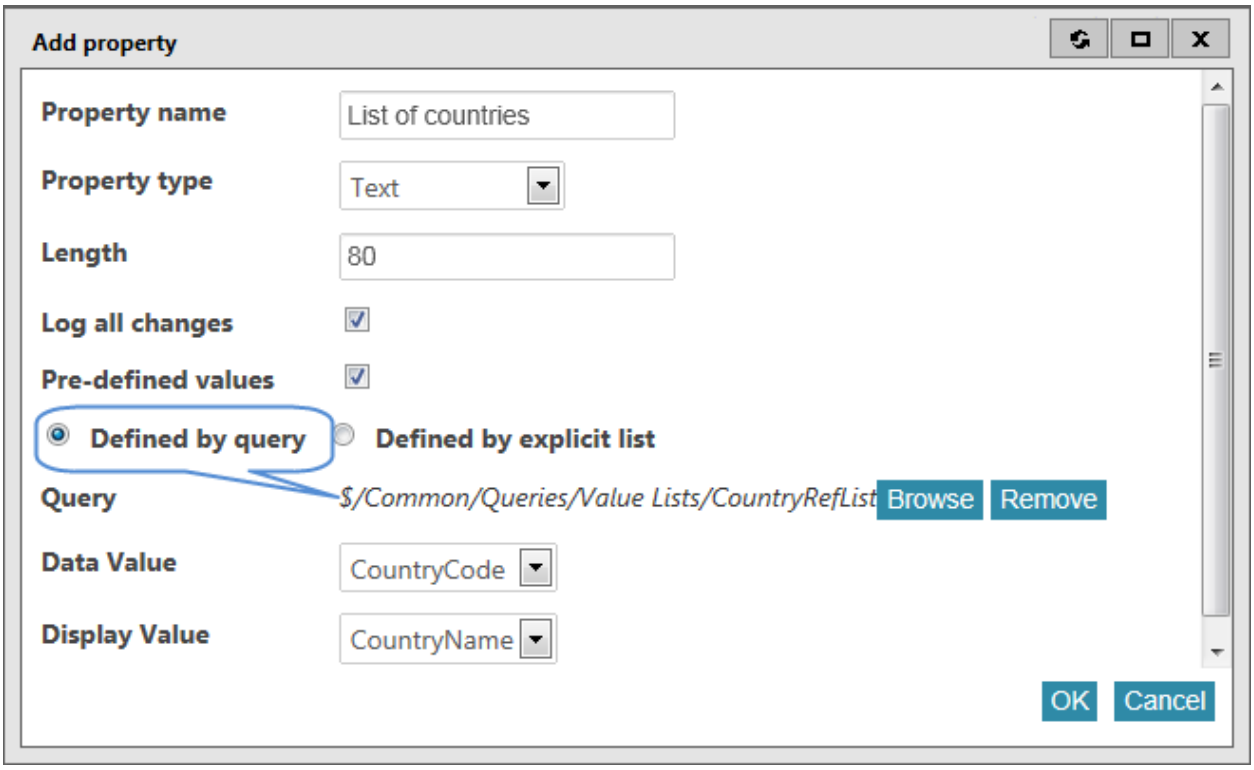
10. Enter a Property Name.
    - Starts with a letter
    - Contains only letters, numbers, and underscores
    - Is unique within its Source
11. Choose a property type that best fits your purpose, within these valid ranges:
    - Currency: 19 total digits (precision), with 4 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Date, Date and Time, Time: January 1st, 1753, through December 31st, 9999
    - Decimal: 28 total digits (precision), with 12 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Email: Creates a mailto link, which launches the user's default mail application when selected.
    - Integer: -2,147,483,648 to 2,147,483,647 (±2 billion)
    - Text: By default, the Text Property type allows:
    - Free-form entry up to 400 characters (defaults to 80). You can select to display the text-box as a single line or multi-line textbox.
    - Pre-defined values from a query or explicit list that display as a drop-down list at runtime:
    - Query – For example, you may want to use a query that returns a list of countries.
    - Explicit List – For example, you can add a list of colors the user can select as their favor-ite.
    - URL: Creates a live hyperlink, which launches a new instance of the browser to open the link when selected.
    - Yes/No: Boolean

12. Enable the Log all changes if you want to track any data change made to the property you are adding.

    Hint: Add the Change History Display iPart to a content record if you want to display data changes made in the Name and Name_Fin tables as well business objects.

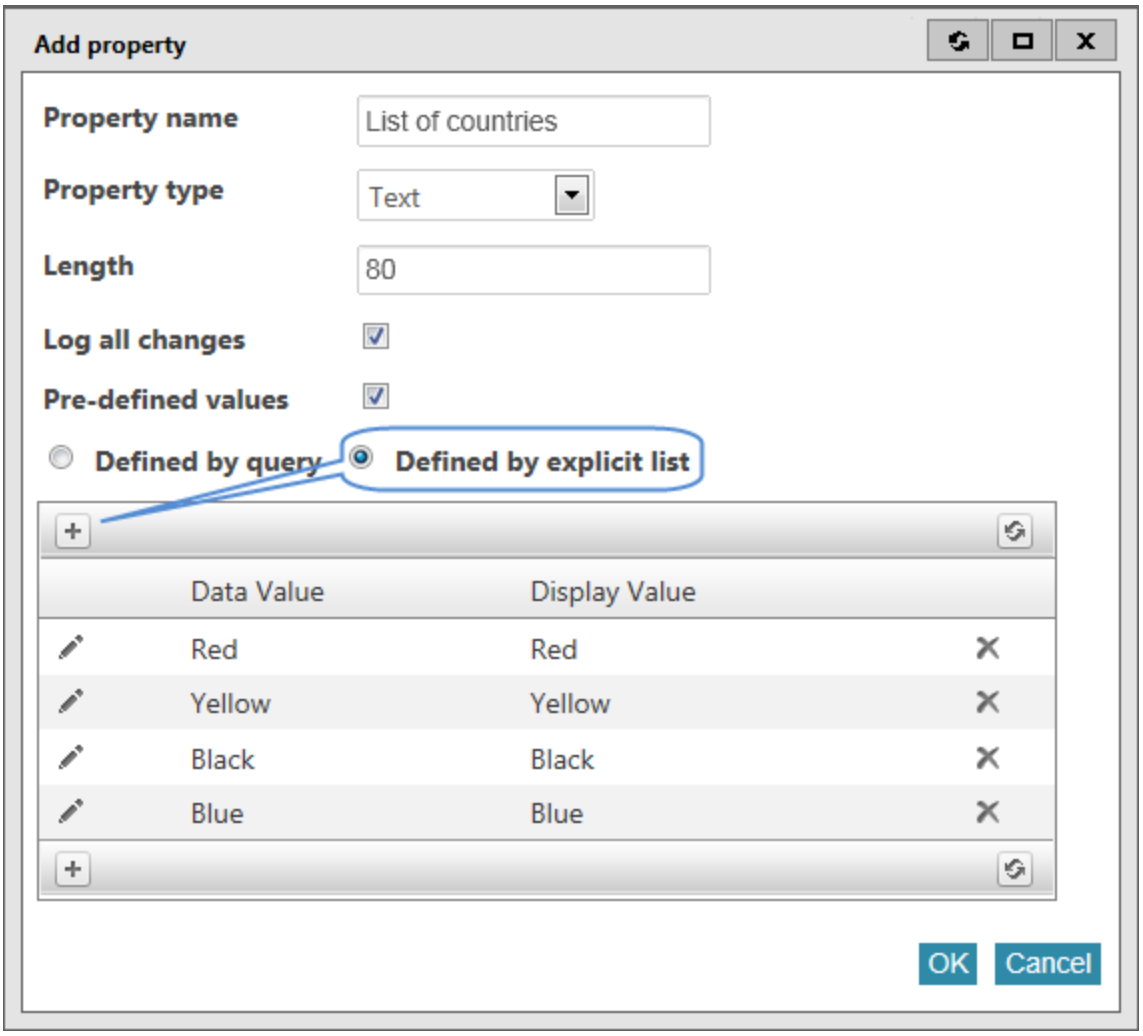
13. (Text Property type only) The Pre-defined values option allows you to present a list from which the user can select.

- The Query option provides validation-type properties based on the query results. For example, instead of typing out a list of countries, you could select a query that displays country values.
- Enable the Pre-defined values checkbox and select the Defined by query option.
- Click Browse, select a query, and click OK.
- Two additional fields display, Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel. For example, the country code may not be as clear as the country name.
- Select the fields from the drop-down list in the Data Value and Display Value fields.
- Click OK.



- The Explicit List option allows you to create a list to display on the panel. For example, you may want a user to select their favorite color.
- Enable the Pre-defined values checkbox and select the Defined by explicit option. A table grid displays.
- Click + to add a data row. The data row contains two icons: Insert and Cancel, and two fields: Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel.
- Enter the appropriate values in the Data Value and Display Value fields.
- Click the checkmark located to the left of the data row.
- Click + to add additional data rows.

- Click OK.



14. Drag the field(s) to the layout area.
15. Save the panel to save the source and properties. Once you save a property, you cannot rename it. Note that the sources will alphabetize properly on reopening.

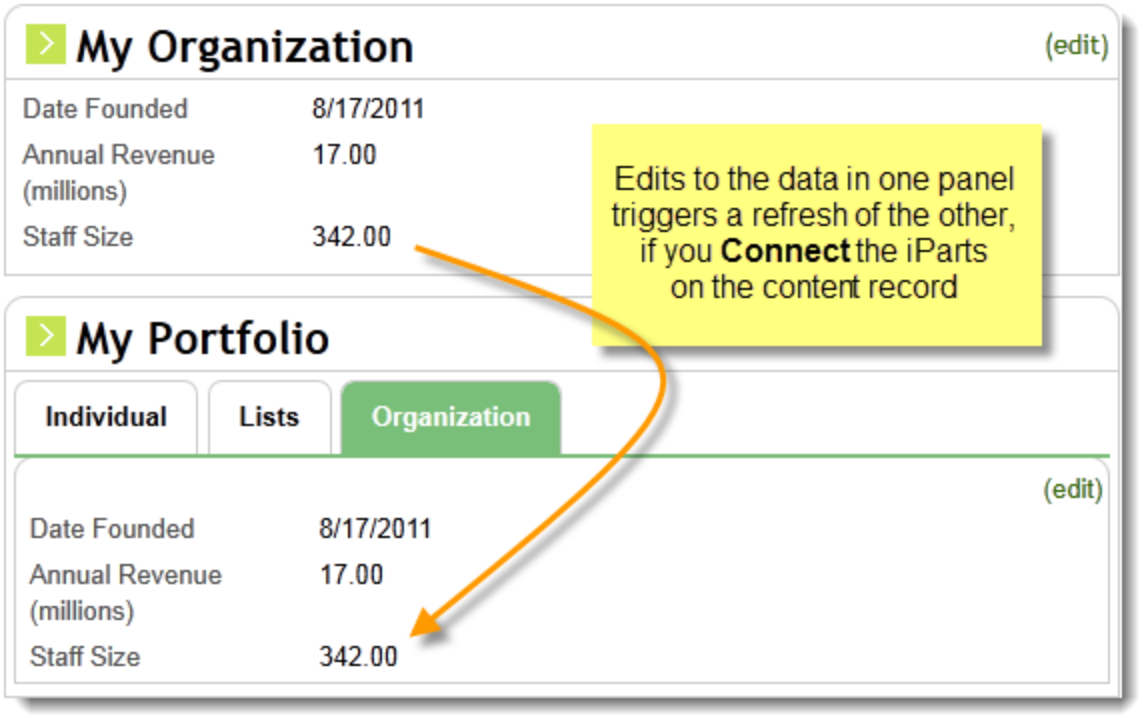
    Each new property you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object property is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

    Tip: Do not save until you create all of the properties. This way, you can view them as a set of properties and improve your naming convention before it is finalized.

16. Save and close the Panel Designer window.
17. Save & Publish the content record.

Connecting iParts to refresh panels

When you combine panel-displaying iParts on the same content record, data might appear out of sync after the user edits it, if both panels display the same property. You can solve this refresh problem through the iPart's Connect feature, which you enable separately from Configure.



Note: Check an iPart's Configuration Help topic to find out if it supports any connection options. An iPart has no connection support (neither consumer nor provider) unless its author added it.

To connect panels for dynamic updating

1. Edit a content record and add two user-editable iParts that display panels (Panel Editor, Panel Collection Editor).
2. Set up the first connection:

- From the first iPart's title-bar menu, select Connect.

  The Connect box that opens shows you any current connections and lets you disconnect them.

- Select Create a new connection.

  The Connect box that pops up prompts you to create one of four connection types.

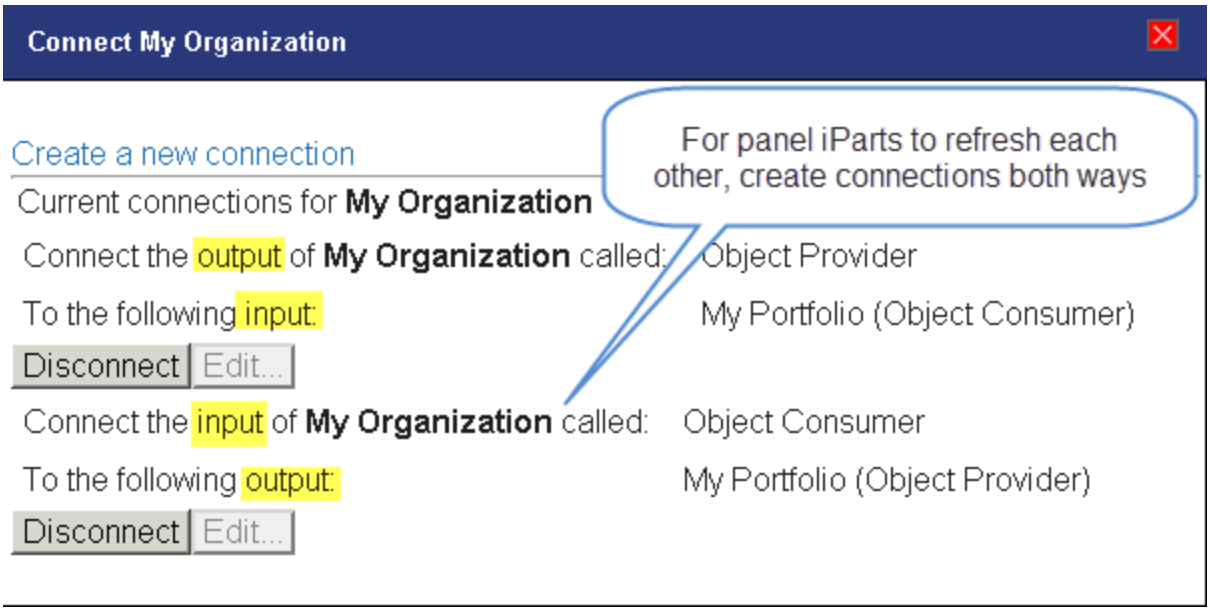
  Tip: Do not be misled by the language of connection. The Consumer is the actor that triggers a refresh on another iPart, and the Provider provides a pointer to itself to the Consumer.

- From the Object Consumer drop list, select the panel iPart you want to refresh.
- Select Connect.

3. Set up the second connection:

- From the second iPart's title-bar menu, select Connect, and select Create a new connection.
- From the Object Consumer drop list, select the first iPart.
- Select Connect.

  You should see a pair of connections, for mutual refreshing.



4. Save and Publish the content record.

Adding existing business objects to panels

Panel Designer lets you create new data sources on the fly, access any user-defined tables, and make full use of the Activity table. It can also display your existing business objects, if they meet these requirements and configuration settings:

Referencing existing business objects

Panel Designer can display existing business objects that have a ContactKey or ID property. When ContactKey or ID is the primary key, Panel Designer treats it as a single-instance table; otherwise, it assumes it to be multi-instance.

Panel Designer cannot display your business objects until you add them to the ObjectMetaData table. While attached to the iMIS database in SQL Server Management Studio, run this SQL statement:

INSERT INTO [dbo].[ObjectMetaData] (ObjectName, RelatedToEntity, IsUserDefined, IsMultiInstance)

VALUES ('MyObject', 'Party', 0, 0)

- Replace MyObject with the name of the business object, table, or view that is related to Party.
- Change the last value to 1 if it is multi-instance.

Settings for Business Object Designer (BOD)

1. In Business Object Designer, edit your object and open the BOD (Properties tab) > (Display tab).
2. To make a property available to your panels, enable its Available to UI? option.

   Tip: To see your BOD changes immediately, restart IIS.
3. To enable multiple selection for a property, select Check box(es) under Display Control so that you can enable the Allow multiple selection? option.
4. To enable HTML editing, select HTML Editor under Display Control. Be sure to use the property in a single-column panel to provide the control adequate width.

   Troubleshooting

   If you get an error when creating a new data instance at runtime (either single- or multi-instance), check that your business object does not have a 'Read-only' constraint set on the ContactKey or ID property's Definition tab.

Connecting picture iParts to Facebook

You can set up the Contact Mini Profile and Contact Profile Picture iParts to prompt people to use their Facebook profile picture in iMIS, instead of uploading a picture. To use this feature, you must do the following:

- Contact your Hosting Administrator to enable Enable the Facebook feature in the web.config file
- Create a Facebook app so that your website can connect to Facebook
- Enable the iPart configuration option to Prompt for Facebook connection

When enabled, signed in users are prompted to connect to Facebook when they edit their profile picture and wherever their profile picture is displayed.

To create your Facebook application and use it in iMIS

1. Contact your Hosting Administrator to request that they do the following: Edit your web-site's web.config file, located by default in C:\Program Files\ASI\imis\net. Find the EnableFacebookApi property, and change the value to true.
2. Create your Facebook application.

- Log in to the Facebook Developers site.
- Click +Create New App.
- Enter an appropriate App Display Name and App Namespace for your organization. Only the App Display Name will be visible to users.
- Click Continue and complete your App creation.
- On the Basic info page for your App, enter the Site URL for your iMIS application.
- Take note of the App ID Facebook has created for you.

3. Contact your Hosting Administrator to request that they do the following: Add your Face-book App information to the required iMIS JavaScript.

- Edit your iMIS Facebook.js file using a text editor. By default it is located in C:\Program Files\ASI\imis\Net\AsiCommon\Scripts\SocialMedia.
- Find the appId value and update it with the ID issued to you by Facebook.

To load the Facebook API

1. Edit your website's master page. By default it is located in C:\Program Files\ASI\im-is\Net\App_Themes.
2. Add the following html within the <body></body> tags of your master page:

To enable the Facebook connection in iParts

Configure each instance of the Contact Mini Profile and Contact Profile Picture iParts used in your website to enable the options Allow picture change and removal and Prompt for Facebook connection.

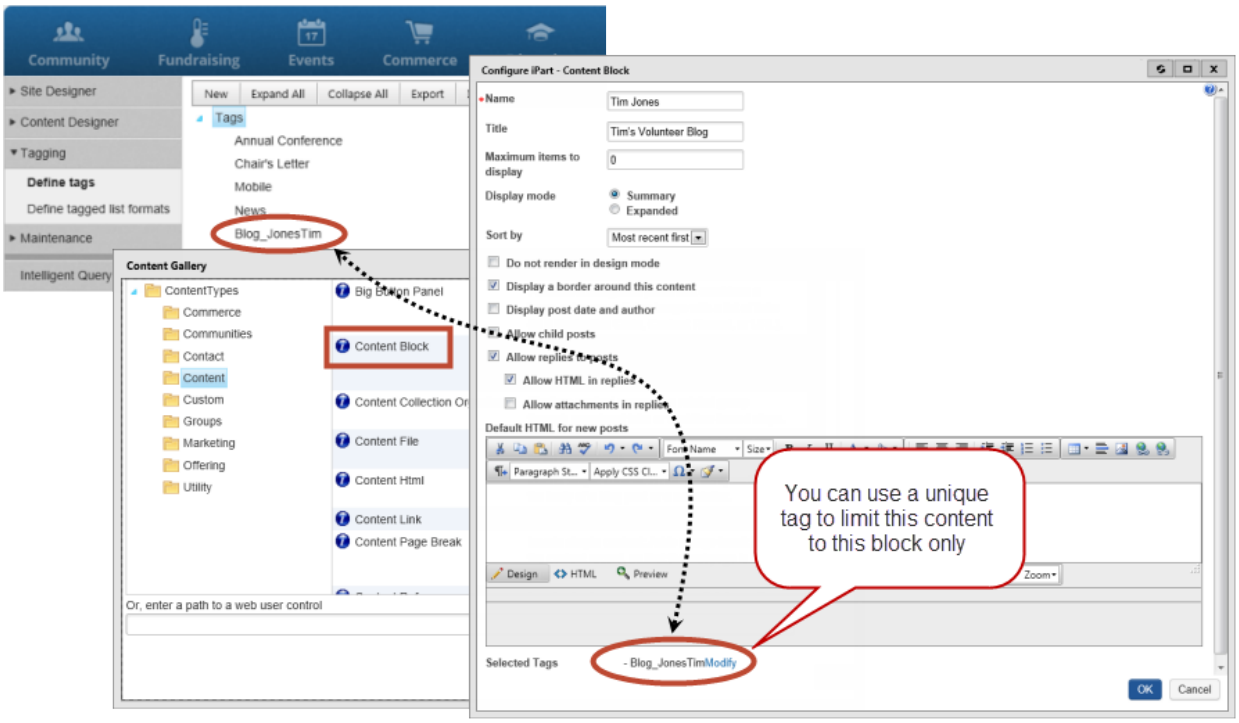
Note: When the Facebook feature is disabled in the web.config file, the Facebook options do not appear in the Contact Mini Profile or Contact Profile Picture iParts.

Using the Content Block iPart

With the Content Block iPart, you can empower authorized users to create and edit content directly on a page, without using Surf-to-Edit or accessing Tools. Through iPart configuration, you can allow users to insert HTML content, add attachments, create child pages, and submit replies. At its simplest, a content block can be HTML that is read-only unless the user has permissions to see the edit command. At its most complex, a block can act as a message board with multiple posts, child posts, and replies. You can limit the number of posts to a set number, or you can leave it at the default (zero), which lets it grow indefinitely.

Tagging to filter content

To control what content appears in a Content Block, you create tags specific to ContentBlock Items and apply those tags to specific instances of the iPart. For example, if you want to create a new blog for Tim Jones, you could create a ContentBlock tag such as blog-JonesT, place a new Content Block iPart on a content record, and configure the iPart to display the tag blog-JonesT. Now the content that Tim authors in this blog will be unique to his+ blog, if you do not apply this tag anywhere else:



Content created with anything other than a Content Block iPart will not be displayed, even if it has the same tag. For example, a content record containing HTML tagged with News will not show up in a Content Block that is also using the News tag.

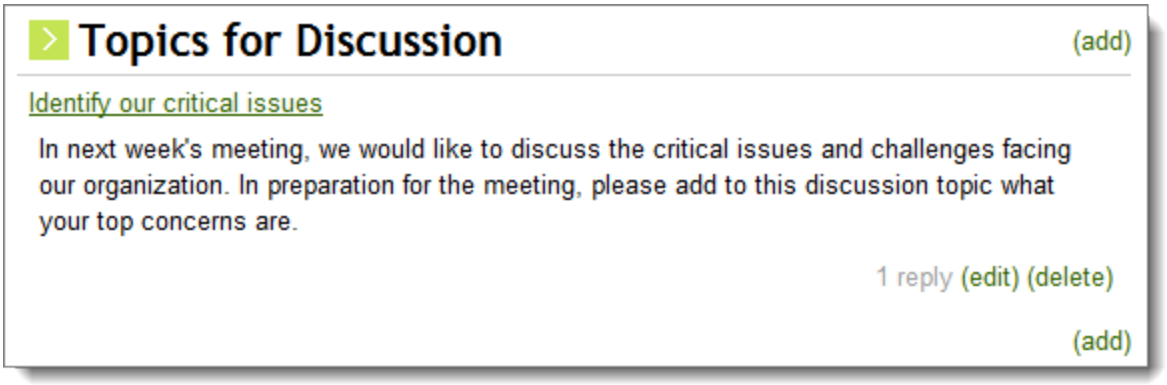
Best practice: Plan for and create the tags you want to use before configuring your Content Block iParts. Content can seem to disappear if you change the tags assigned to a content block already in use, because it no longer matches the tag set currently configured.

Creating a message board

Only users with the Content Editor permission may create posts and children, but any authenticated users can reply to a post and edit or delete their own replies. Any authenticated user may create posts and children, reply to a post and edit or delete their own replies.

To use the Content Block as a message board with multiple posts, child posts, and replies, make use of the following configuration options:

- Maximum items to display - Choose the maximum number of posts that will be displayed; 0 indicates an unlimited number of posts.
- Display mode - Expanded display mode will display replies and child posts in-line, while Summary mode only shows replies and child posts when the post is opened.
- Allow child posts - Allow Content Editors to add a child post to existing content. Allow any authenticated user to add a child post to existing content.
- Allow replies to posts - Allow authenticated users to reply to posts; you may indicate whether to allow HTML and/or attachments in the replies.



Content Block iPart set up as a discussion board

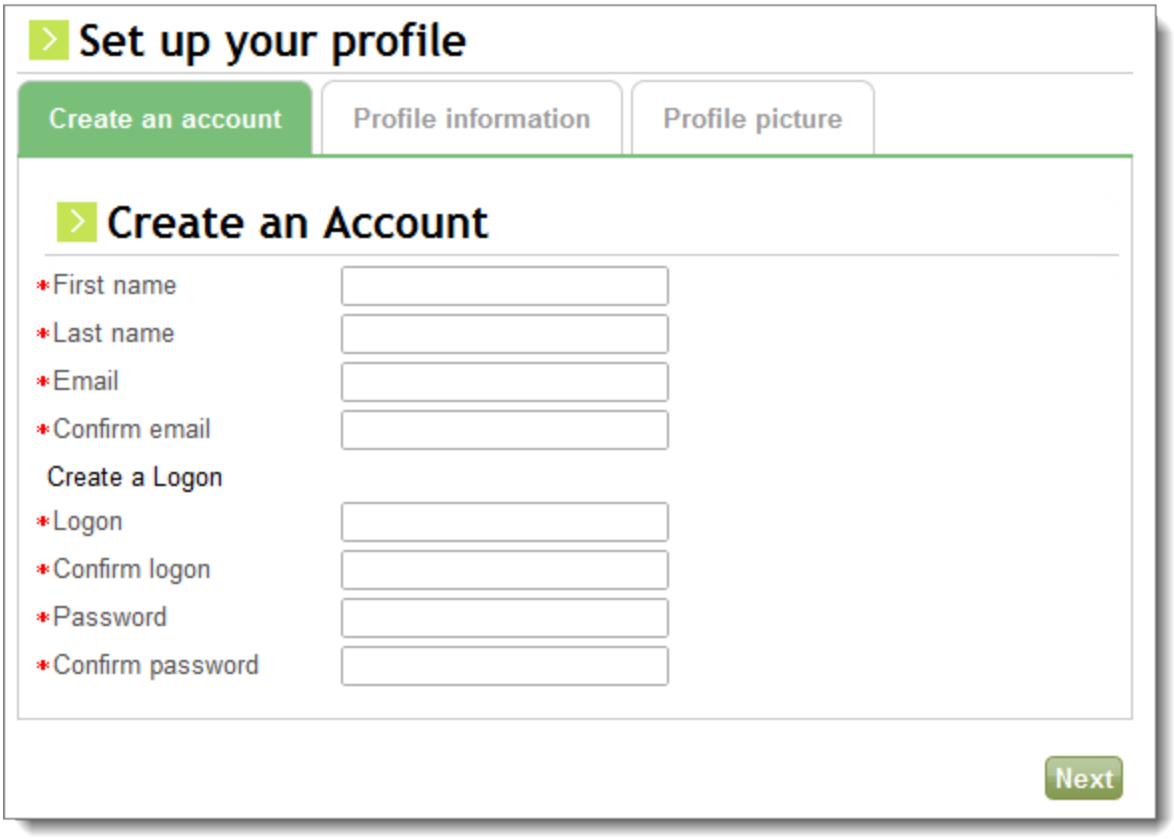
Using the Content Collection Organizer

Use the Content Collection Organizer to create a collection of pages and assign names to the tabs or headers for each page. In the simplest example, those pages are displayed,

the user can access tabs in any order desired, and information is saved independently on each page. The following screenshot shows an example with tabs across the top, configured to display different content pages.

Using the Content Collection Organizer as a Wizard

You can configure the Content Collection Organizer to function as a wizard, which will guide the user through multiple steps. When enabled, Next and Previous buttons display, allowing users to navigate between the steps, as shown below. The user can navigate to any previous tab, but forward only to the next tab in the workflow sequence. The user can also navigate with the browser's Forward and Back buttons, but the data does not commit until the user clicks Next.



Each page in the workflow is validated when the user clicks the Next button. Each iPart's page.Validate method is processed in the order the iParts appear on the page. The order of calls is:

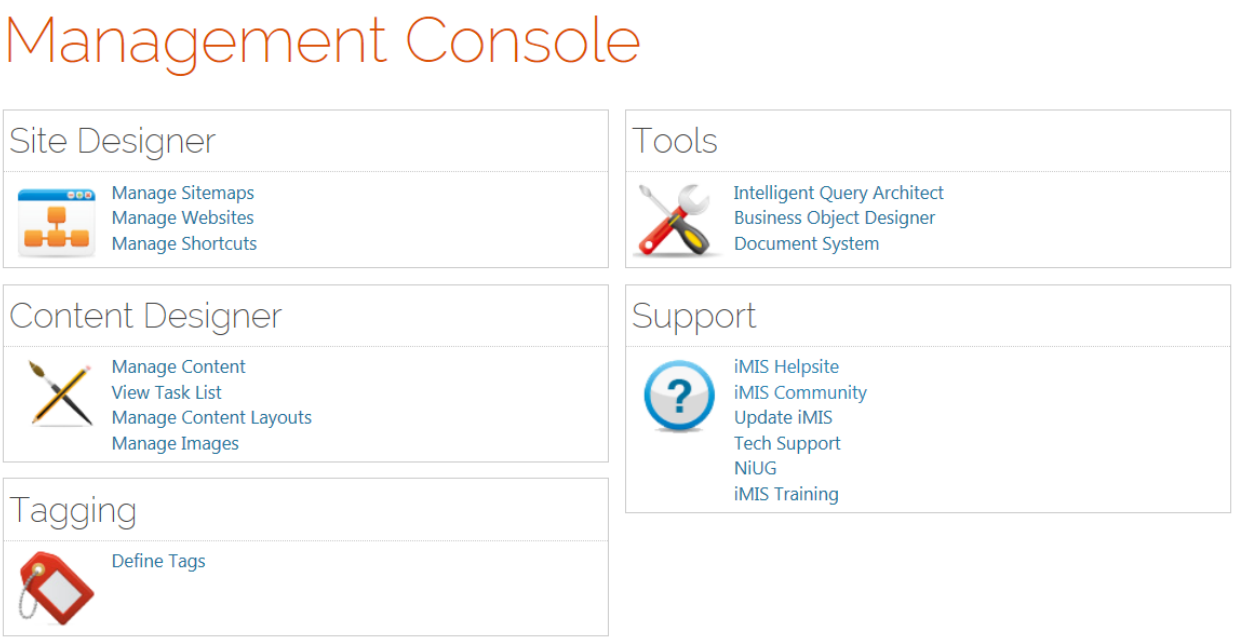
- Validation
- If Validation passes, then PreCommit
- If PreCommit passes, then Commit

If any of the calls fail (the data on a page is incomplete or incorrect), then an error message displays and the user cannot move to the next step until it is corrected.

Using the Big Button Panel iPart

With the Big Button Panel iPart, you can display a navigation panel that combines a larger, category-defining image with a list of links, as shown in the screenshot below. You

can also use this iPart to create links that make it easy for staff to perform routine tasks for contacts such as running reports, registering for events, and ordering on their behalf.



Example: Working On Behalf Of contacts and running reports using the Big Button Panel

In this example, we will set up the Big Button Panel on the account page, so that staff can select a contact from the Directory, then quickly run a report, register for an event, make a donation, or order a product for that contact.

1. Edit the account page that displays after a staff user selects a contact from your directory. In the Member site, it is the Account Page Staff content record.
2. Add the Big Button Panel (add content > ContentTypes > Content > Big Button Panel) iPart to the content record and configure it with the following settings:

- Mode: Actions
- Add an action link to run a report:
- Link Text: Print Info
- Link Target: Enter a link to a page that contains the SSRS Report iPart that displays a report such as $/Samples/ReportingServices/MemberProfileQuery_Report.

Note: The SSRS Report iPart must be configured to Hide the parameters section and to enable the option to Inspect query string for parameters. Do not enable the option to Inspect Session for parameters. For more information about SSRS reports, see Creating SSRS reports.

- URL Parameter: ContactKey=@SelectedUser
- Add an action link for event registrations:
- Link Text: Register for an event

  Note: Customize this text for the event you want to register the contact for. For example, Register for the Spring Conference.
- Link Target: Enter a link to the event page
- URL Parameter: EventKey=XYZ (replace XYZ with an event code) EventKey=XYZ (replace XYZ with an event key)
- Use On Behalf Of: Enable
- Add an action link for donations:
- Link Text: Make a donation
- Link Target: Enter a link to your donation page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable
- Add an action link for the shop:
- Link Text: Purchase a product
- Link Target: Enter a link to your Shop page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable

3. Save and Publish the account page.

Using the Group List Editor iPart

The Group List Editor provides a flexible tool for you to display and manage lists of groups, sub-groups, relationships, and/or memberships. You can configure it to serve several different purposes.

Display an organization's roster

A common use for the Group List Editor is to display a list of contacts that belong to an organization.

For example, add the iPart to an organization's profile page, so that the iPart displays memberships for the selected organization. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the roster
- Clicking on a contact opens their profile page: Enable to link contact names directly to their profile page
- Provide option to view and edit membership details: If you want users to have easy access to both the account pages and the Group Member Detail window, also enable this option. Users can click an icon to switch between these options.
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups owned by the parent ID and their members
- Choose the group types to include: Organization
- Automatically create a group if one does not exist: Enable if you have allowed editing (this allows the creation of new rosters)
- Group owner type: Party
- Group type to auto-create: Company
- Choose the group types to include: Ensure that Company is selected

Display a contact's memberships

Another common use for the Group List Editor is to display a list of a contact's memberships in groups such as committees and chapters.

For example, add the iPart to a contact's profile page, so that the iPart displays memberships for the selected contact. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the contact's memberships
- Clicking on a contact opens their profile page: Not applicable
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups that the parent ID is a member of
- Choose the group types to include: Select the group types you want to display, such as Chapters and/or Sections

Relationships in the Group List Editor

You can easily create a link between two contacts using the Group List Editor iPart. The relationships you define show up on the record of both contacts, and you can specify roles for one or both of the contacts. For example, if you edit Jean Smith's record to indicate that she knows Russell Smith, then that relationship will also appear in Russell Smith's record. Alternately, if you edit Jean's record to indicate that Russell is her child, you can also specify that her role is the parent of Russell. Then Russell's record will reflect that Jean is his parent.

There is no limit to the number of relationships you can create or the types of relationships you can create. We have provided a few relationship types out-of-the-box, but you can add additional ones if needed.

Only users with System Administrator or Staff privileges can create relationships between contacts, but any user can view a list of relationships.

Note: To use this relationship feature, you must have the RELATION license.

The following sections walk you through how to create relationship types and how to set up the Group List Editor to display relationships.

Creating relationship types groups and roles

Edit the Customer setup table for Relationship types, adding the relationships that you want to have available in the Group List Editor. For each relationship type you add, you can also define a Reciprocal relationship, which the Group List Editor automatically populates as a set (such as for Parent and Child).

To display and edit relationships in the Group List Editor, you must define a Relationship Group and Roles (relationship types) associated with that group. A sample relationship group type named Connections has been provided. You can create your own group type from Setup > Groups > Types. If you create your own group type, the only requirement is that you select the Relationship Group checkbox, so that the Group List Editor can properly display relationships.

To create Roles used in relationship groups

1. Decide which relationships you want to be able to define for users. For example, Parent-Child, Husband-Wife, etc.
2. Create Roles for each relationship type.

- From Setup > Groups > Roles, click add.
- Enter the Name of the Role and a Description of the role.
- Select the Active checkbox.
- (optional) Select a default Reciprocal Role for this role. For example, if you are creating a Parent role, you may consider selecting Child as the default Reciprocal Role, so that it is automatically selected when someone defines a Parent relationship. If the Reciprocal Role you want to add is not in the list, create it first, then add it to this role.
- Save and repeat for each relationship role you want to define.

3. Edit your relationships group (for example, the group Connections) to add the roles you have defined.

To set up the Group List Editor to display relationships

1. Add the Group List Editor iPart to a content record on which you want to display a list of a contact's relationships. For example, add it to an account page. The iPart displays a list of relationships for the currently selected contact. The selected contact is determined by either a contact ID passed to the page via a URL parameter (from the Directory, for example), the contact selected in the On Behalf Of control, or the currently signed in user.

   Note: For help adding iParts, please see Creating Custom Panels of Data.

2. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit relationships
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Both of the above
- Automatically create a group if one does not exist: Enable
- Group owner type: Party Choose the group types to include: Select Relationships
- Group type to auto-create: Select a relationship group, like Connections
- Choose the group types to include: Ensure that Connections is already selected.

  Note: Only the relationship group type selected to auto-create may be edited. For this reason, if Allow editing is selected, we recommend including only the one relationship group type in this instance of the iPart.

3. Save and Publish the content record.

Using the Content HTML iPart

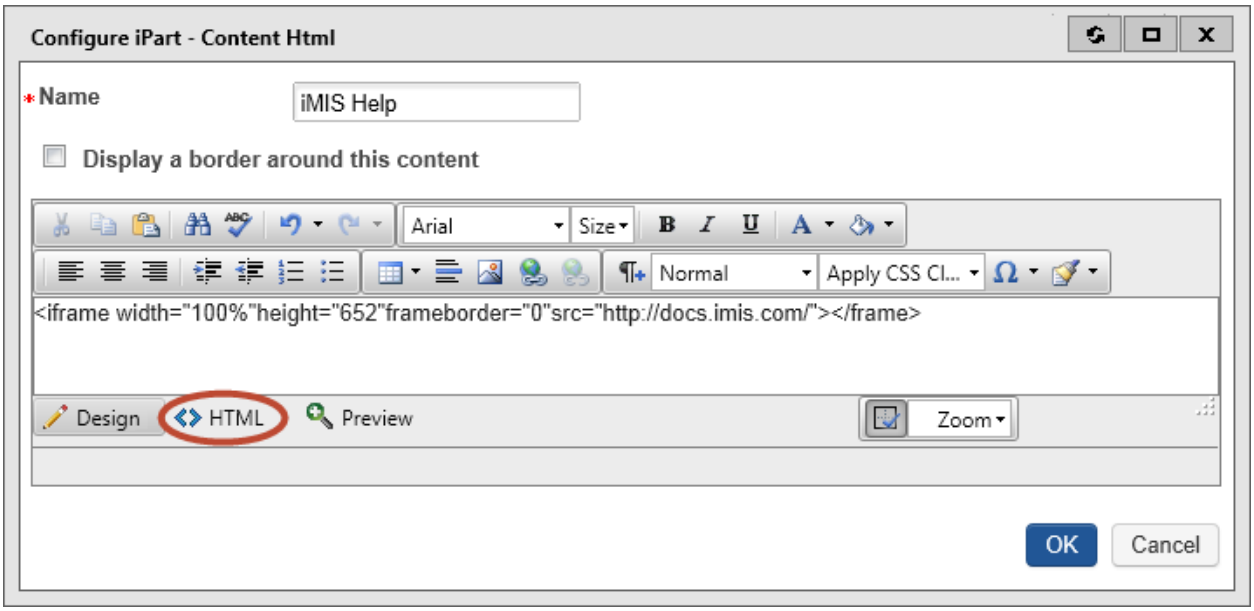
Using the Content HTML iPart, you can add simple content to your website, anywhere you want. In addition to the WYSIWYG functionality, you can switch to HTML mode to insert JavaScript to embed other sites, display web widgets, and use variables to create relative paths.

Embedding external sites

To embed any external page into an iMIS site, you can use an <iframe> like this:

1. Go to Content designer, Manage content and create a new content record.
2. Select add content and place a single Content Html iPart on it (from the ContentTypes folder).
3. Show the source by clicking the <> HTML tab and type in an iframe tag, such as this:

   <iframe width="100%" height="652" frameborder="0" src-c="http://docs.imis.com/"></iframe>
4. Go to Tools > Site designer > Manage sitemaps and create a new navigation item that points to the new content record.
5. If appropriate, restrict the navigation item's Access Settings, such as to Authenticated User Full Control.



Displaying web widgets

You can install and display JavaScript-based web widgets (plugins, gadgets) in your WCM-generated websites using the Content HTML iPart. A web widget is a small pro-

gram that your users can execute within a web page and that can provide a wide range of functionality.

For example, Google Gadgets offers thousands of free web widgets including mini applications, games, news feeds, maps, and a wide range of other types of content. Many other websites also provide free widgets that can access data from their site. For example, Twitter provides widgets that let you display Twitter updates on your website. LinkedIn provides plugins that display information such as company profiles, member profiles, and links to share on LinkedIn. You just have to search the web to see what you can find that meets your needs.

Warning: Only embed widgets from authors whom you trust. Malicious code may damage your computer or violate your privacy.

To add a JavaScript-based web widget to a webpage

Go to Content Management > Content designer > Manage content:

1. Create a new content record or edit an existing one.
2. Click add content to find and select the Content Html iPart.

   The Configure iPart window opens.
3. Click < > HTML to switch to HTML mode.
4. Copy the JavaScript embed code for the widget you want to add and paste it into the HTML area.
5. Click OK, then Save and Publish your content record.

   The widget is displayed when that content record is rendered on a webpage.

Creating relative paths using variables

The Content HTML iPart does not support the use of the ~/ (tilde slash) shortcut, often used to automatically build the correct paths when a control is rendered in different domains. However, several variables are available in this iPart that allow you to enter

paths for links and resources that are automatically resolved to various folders in your website. The variable names are case-sensitive.

Note: Images do not render in Design mode because the variable is not transformed until the content record is published.

- [Website] – Resolves to the root of the website and contains the website name. Example: [Website]Home.aspx.
- [~] and [Root] - Both variables resolve to the root of the website. Example: [~]Home.aspx resolves to http://mydomain/Home.aspx.
- [Theme] - Resolves to the website's theme folder. Example: [Theme]images/image.png. This variable can be used to access theme resources such as images and CSS.
- [iMIS] - Resolves to the iMIS directory of the website. Example: [iMIS]ContactManagement/CreateAccount.aspx
- [Common] - Resolves to the AsiCommon directory of the website. Example: [Common]Controls/Shared/FormsAuthentication/Login.aspx

On Behalf Of: Customer service mode

Your iPart-based site is not just for self-service: On Behalf Of gives your staff a customer service mode, to complete website commerce on behalf of your customers. When requests for event registrations, product orders, and even membership renewal payments come in by phone, fax, or email, On Behalf Of lets you conduct a secure session during which you can add items to a customer's cart and complete the transaction for them, all without signing out of your own session.

Separate carts, for privacy

To avoid confusion and to protect your customers' privacy as to which items they may have added to their own carts, On Behalf Of sessions create and save carts that are completely separate from those your customers see. For added security, items yet to be purchased are saved in these carts, but not any cardholder information that may have been entered.

For example, if you added a registration to a member's cart but do not submit it, then she will not see the registration in her cart the next time she signs in; however, when you return to registering her on her behalf, you see her cart restored to the state it was in when you left it. Once you complete a purchase on her behalf, both she and you can see the order through her account page.

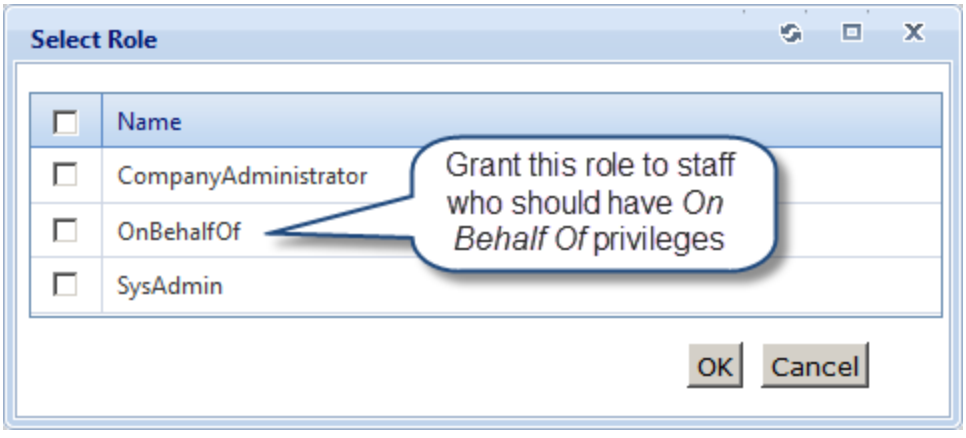
Tip: You can use the audit trails to track which logged-in user performed each action that affected an On Behalf Of transaction.

Who can act On Behalf Of?

To protect the security of contact data, users must be added to the security role SysAdmin or OnBehalfOf to perform actions on behalf of another contact (individual or organization). It is easy to give a staff member On Behalf Of privileges.

Go to System Setup > Security administration > Users:

Find and select a user, and in User Information click add role.



Changing and ending On Behalf Of

When you act on behalf of someone else, all of your commerce-related actions pertain to the target contact until you end the session in one of these ways:

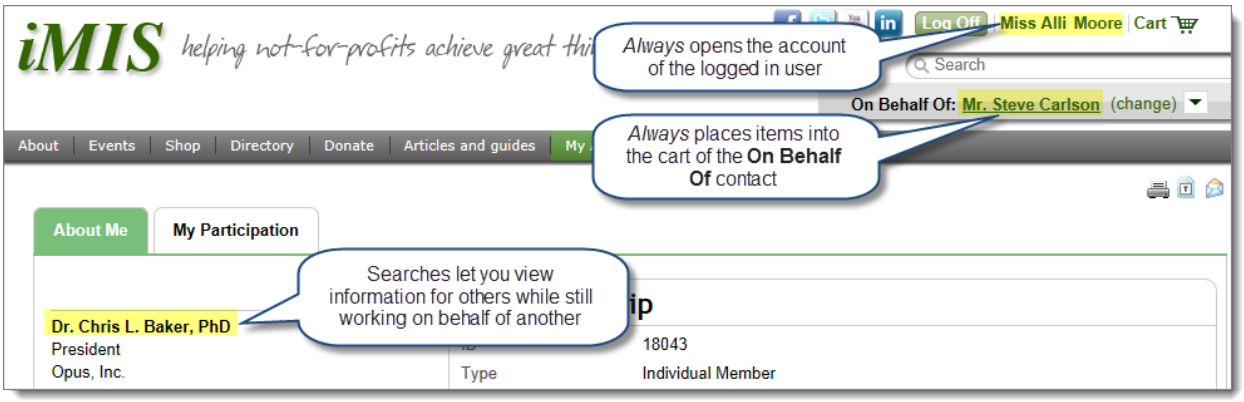
- Select a new target contact: click (change) next to the target contact.
- Clear the selected contact: click the down arrow next to the target contact and select Clear.
- Close the browser.
- Sign out of iMIS.

Whose contact information do iParts show?

Acting on behalf of another contact controls the current cart, but it does not keep you from getting to information for other contacts. An iPart determines whose cart and information to show and update based on this logic:

- If the link's URL specifies an ID (such as for search results), it shows information for that contact.
- If not, it shows information for your On Behalf Of contact, if appropriate. (For example, the Query Menu iPart runs queries regardless of the target contact.)
- Without On Behalf Of, it shows information for you, the logged-in user.
- If no one is signed in, it shows limited information.

For example, you could be working on behalf of one contact when you need to use the Directory to look up an address for another. You can drill down on information from those searches with no effect on your on-behalf-of contact: the iParts pass the queried contact's ID on the URL to show you the information you need. Only when you take actions that add items to the cart is On Behalf Of enforced.



Tip: What never changes is the contact name link in the top navigation: it always shows information for you (the logged-in user).

Creating dynamic content with iParts

iParts are the foundation of your iMIS sites that you build with RiSE. This section helps you to understand and master iParts that present attractive and dynamic content to your users.

What are iParts?

An iPart is an iMIS-specific web part that represents a building block of features that you can place on a content record with other building blocks to create new pages of features. Multiple iParts can be combined and displayed in a content record as you prefer.

Default iParts appear throughout iMIS. You can modify them for your needs and you can reuse iParts throughout the system. For example, an iPart displaying a roster for a Membership Group can follow the same user behavior patterns as an iPart for a roster in Events.

Where can I find and use iParts?

To create a new web page containing one or more iParts

Go to RiSE > Content designer > Manage content:

1. Create a content record.
2. Click add content and select the desired iPart from the Content Gallery.
3. Enter the applicable information and select the desired options.
4. Click OK.
5. Click Preview to see how the content will be displayed to users.
6. Click Save and then Publish.
7. From RiSE > Site designer > Manage sitemaps, create new website navigation.

Note: If no owner is specified for the content block, the default organization displays as the owner.

8. Click Publish.

To add an iPart to an existing webpage

All iMIS sample sites come pre-filled:

Go to RiSE > Content designer > Manage content:

1. Select the site you'd like to add the iPart to.
2. Select the Content area in which you would like to place the new iPart.

   For example, if you would like to add a new iPart to the home page, select Home from the content area list.
3. Click Edit.
4. Determine where you would like to place your new iPart, and click add content.
5. The Content Gallery window will pop up. Navigate to the folder that contains your desired iPart.
6. Select the desired iPart and click OK.
7. Configure the iPart by entering applicable information and select the desired options.
8. Click OK.
9. Click Preview to see how the content will be displayed to users.
10. Click Save and then Publish.

To set up a user content area

User content areas are created by using iParts which can be configured to allow a user to post content on the web. Examples of this user-generated content include forums, message boards, or blogs.

Go to RiSE > Content designer > Manage content:

1. Create a content record.
2. Select the Content Block iPart from the Content Gallery.
3. Enter the applicable information and select the desired options. See the help file for details.
4. Click OK.
5. Add additional content to page, if desired.
6. Click Save.
7. Click Publish.

   Go to RiSE > Site designer > Manage sitemaps:

8. Create a navigation.
9. Click Publish. The page displays as configured with an area dedicated to user content entry directly on the page.

Configuring iParts

iPart configuration allows you to:

- Define how the iPart will behave
- Control how much access you want end users to have
- Hide configuration details from end users; two instances of the same iPart with different configurations can appear as two different controls to the end user
- Examples:
- Allow users to edit on a staff-facing site, but display the data in read-only mode on a public-facing site
- Use multiple instances of an iPart on one page to access different sets of data

  Run-time versus design-time

  iParts have two different views:

- Design-time view: What you see in a content record when you add an iPart and configure it.
- Run-time view: What your end-user sees when viewing the iPart within your website. This may differ from what you see in the Design-time view, because some iParts have a different behavior after you publish the content.

Specifying commit sequence

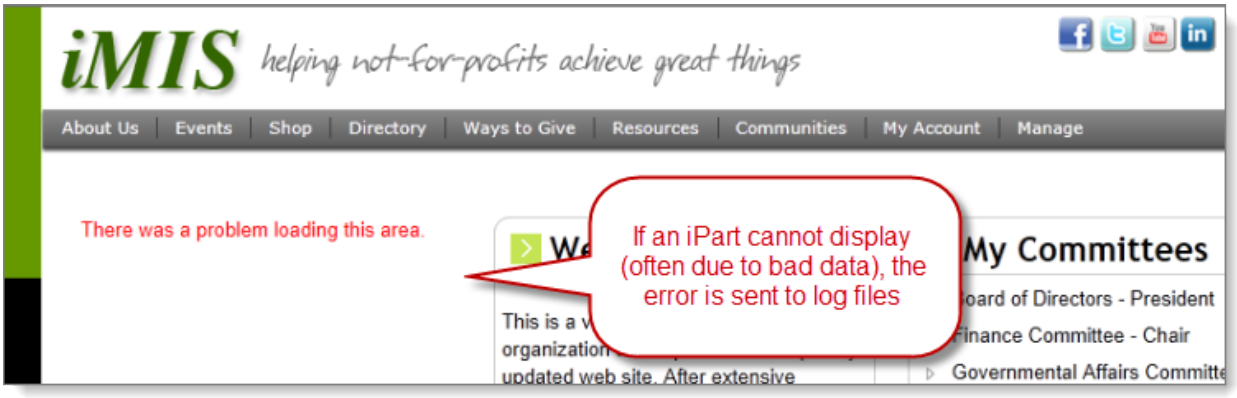
If you place more than one iPart on a page, you might need to specify the order in which actions occur on that page. The commit sequence function allows you to explicitly define the execution order of multiple iParts in a content record.

You can define a commit sequence value for the processing order of each iPart relative to the other iParts in the same content record. The commit sequence value must be zero or greater. iParts with a value of zero (the default) are processed after any other iParts with a non-zero commit sequence value that are in the same content record.

Setting a commit sequence is only required in a few scenarios and is noted in an iPart's configuration help if needed.

Troubleshooting iPart errors

Occasionally, an iPart may fail. However, it will fail gracefully in place, without disabling the whole page. Typically, a "problem loading" error results from some kind of bad data. By default, iMIS hides the error details:



The settings controlling this error logging reside in the <log4net> section of your site's web.config file. The default settings enable error logging in the Windows Event log and comprehensive logging in the ASI log file, which captures both errors and warnings. This log file, Asi.WebRoot.log, is in the folder above your website root.

Contact your hosting administrator if you need access to information in these logs.

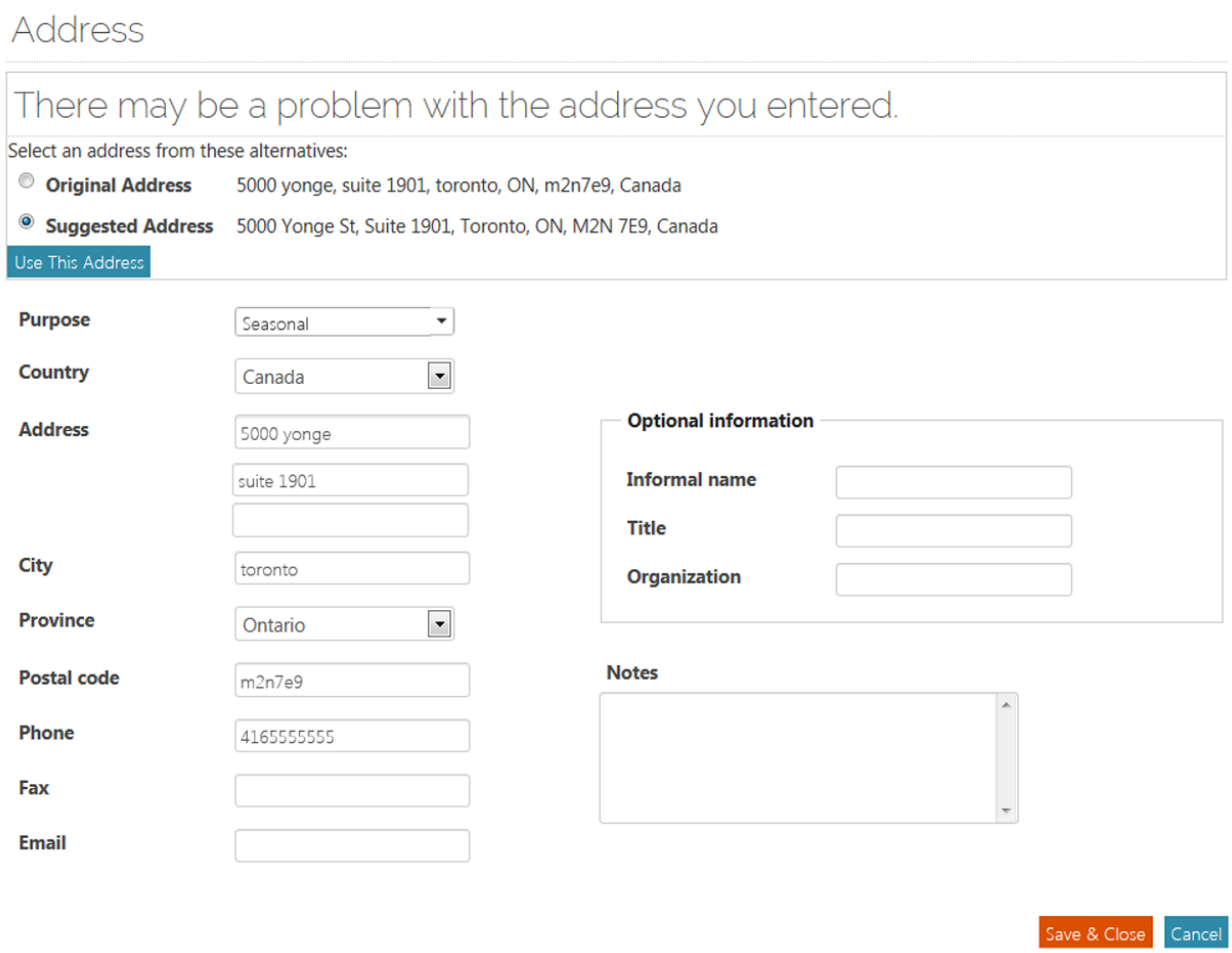
Security for iParts

Most security is defined at the content record level within iMIS. You can choose that different iParts display for different users. For example, an unauthorized user might see the description of a Special Interest Group, but a signed-in member might see the roster for the group and a staff person might have the privilege to add, edit, or delete the group.

Address verification for iParts

iMIS SOA can perform real-time address verification using web services hosted by ASI. There are several benefits to this:

- Running this verification through the ASI web service frees you from having to install and maintain these data files locally.
- Offloading verification to this service keeps it from adding to the processing load of your page.
- The services of different address providers can co-exist, making it possible to verify addresses across multiple countries.
- The service can support future verification of collections of addresses as well as single ones.
- Postal addresses entered in the Contact Account Creator and Contact Address Editor iParts automatically upload to this service that verifies and standardizes the address. Users can then either accept the suggested address or keep the original as it was entered.



The countries supported by this service are subject to change. Contact your AiSP to obtain an up-to-date list.

Passing URL Parameters

Many iParts allow you to change the content they display based on the value of a URL parameter. This gives you the freedom to create a single content record. This record can be reused and the display can be changed based on a value sent in a link to the page. For example, instead of creating a new content record for every event, you can reuse a single content record that displays different event information based on the EventKey value in the URL.

Parameter values are passed to iParts from a several types of sources:

- Search result links
- IQA query links
- Navigation items
- Relative links
- Absolute links

For any iPart that allows URL parameters to be passed, see the configuration help file for detailed instructions.

Tip: If multiple values are sent to a page for a single URL parameter, the first parameter value wins. For example, if the URL pointing to the Event Display iPart is http://my-org/Events/Event_Display.aspx?EventKey=SPR12&EventKey=FALL12, only the SPR12 event displays.

Note: URL parameters set by navigation items cannot be manually overridden in the URL. A user cannot change the parameter value in the URL to display different content.

iPart Examples

iParts can be used in a variety of ways, and in many different combinations to meet your organization's needs. This section contains examples of commonly used iParts and provides guidance in maximizing their benefits.

Displaying query results in iParts

The iParts described in this section use IQA queries to drive the data displayed to users. Each iPart provides a unique way to display the data.

Query Chart Viewer iPart

The Query Chart Viewer displays query results in a chart, which can be set to a range of sizes, skins, and chart types.

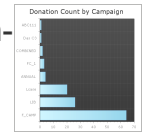
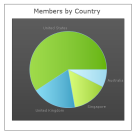
Designing queries for Query Chart Viewer

The Query Chart Viewer can render any existing query, but you will get the best results by following these guidelines on how to design queries specifically for use with this iPart:

- Queries: The queries you create for the iPart should be structured so that the results are appropriate for charting. For example, if you want the chart to display the total sales per salesperson, then the source query should be written using the Sum function in IQA.
- Query Display Columns: Each property you select on the Display tab in IQA is available in the iPart's configuration page as a Data column display option. Note, however, that you can only select two properties to be displayed in the iPart.
- Aliases: In your source query, enter an Alias for the Display properties you plan to show in the iPart. Relying on the default labels may not be sufficient, especially when your query uses multiple joined sources or custom SQL expressions. If the query does not display as you expect, using an Alias often resolves the issue.
- Sorting: You can sort the query results displayed in your chart in ascending or descending order. To sort your results, edit your source query and, from the Sorting tab, add the property to be sorted.
- Labels: The labels on your chart's x-axis may overlap if there are too many data points or if the labels are too long. You may be able to improve the display through a few methods. In the iPart, you can expand the width of the chart or change the label angle. In the query, you can try to reduce the number of data points.
- Dates: For dates to display correctly, you must cast them as float data types with an offset of 2. You can do this in IQA from the Custom SQL Expression section of the (Display tab). For example, if you want to display the OrderDate property in your chart, add the following expression: CAST(OrderDate AS FLOAT) + 2. Then, when you select this property from the Data column list in your iPart, set the Data column format to a date format.
- Integers: If integers display incorrectly in your chart, cast the column to a data type of INT in the Custom SQL Expression section of IQA's Display tab. For example: CAST (OrderCount AS INT).

Chart Types

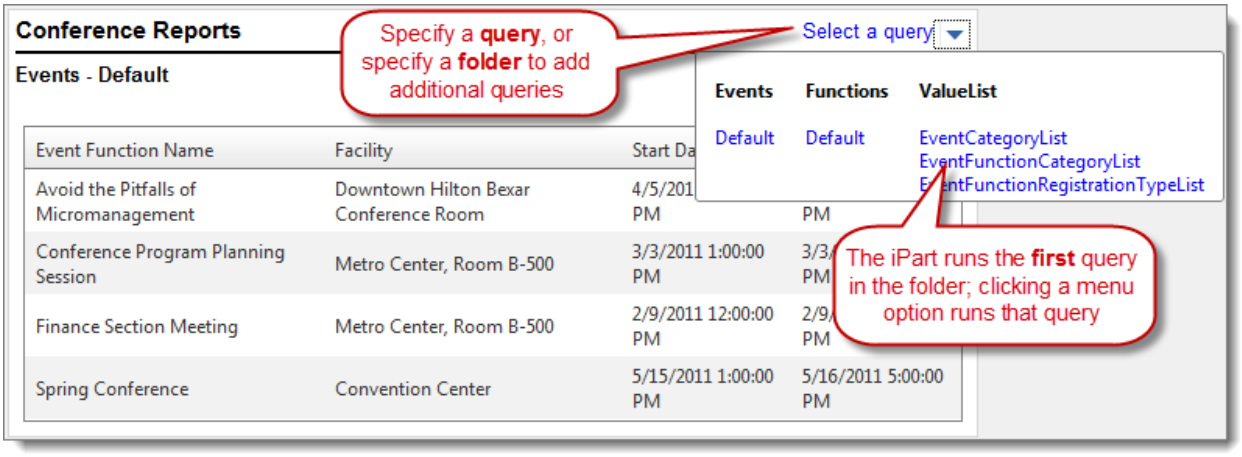
You can display the following types of charts in the Query Chart Viewer iPart.

Chart Type	Example
Area – Displays data in an area filled with color to illustrate trends. For example, create an area chart that shows a member's giving history over time. Note: You can only display one area of data in the iMIS Area chart.	
Bar - Horizontal – Displays sets of data with horizontal rectangular bars for comparison. For example, create a horizontal bar chart that shows the number of donations received by each of your fundraising campaigns.	
Bar - Vertical – Displays sets of data with vertical rectangular bars for comparison. For example, create a vertical bar chart that shows the distribution of your members across states.	
Bubble – Displays data as a series of bubbles. For example, create a bubble chart to show the total number of function registrations for an upcoming conference. Note: You cannot assign a size value to the bubbles in the iMIS Bubble chart.	
Line – Displays data as a series of data points connected by a line to illustrate trends. For example, create a line chart that shows a member's giving history over time.	
Pie – Displays data in a circular chart divided into sections to illustrate proportion. For example, create a pie chart that shows the proportions of your members by country.	

Query Menu iPart

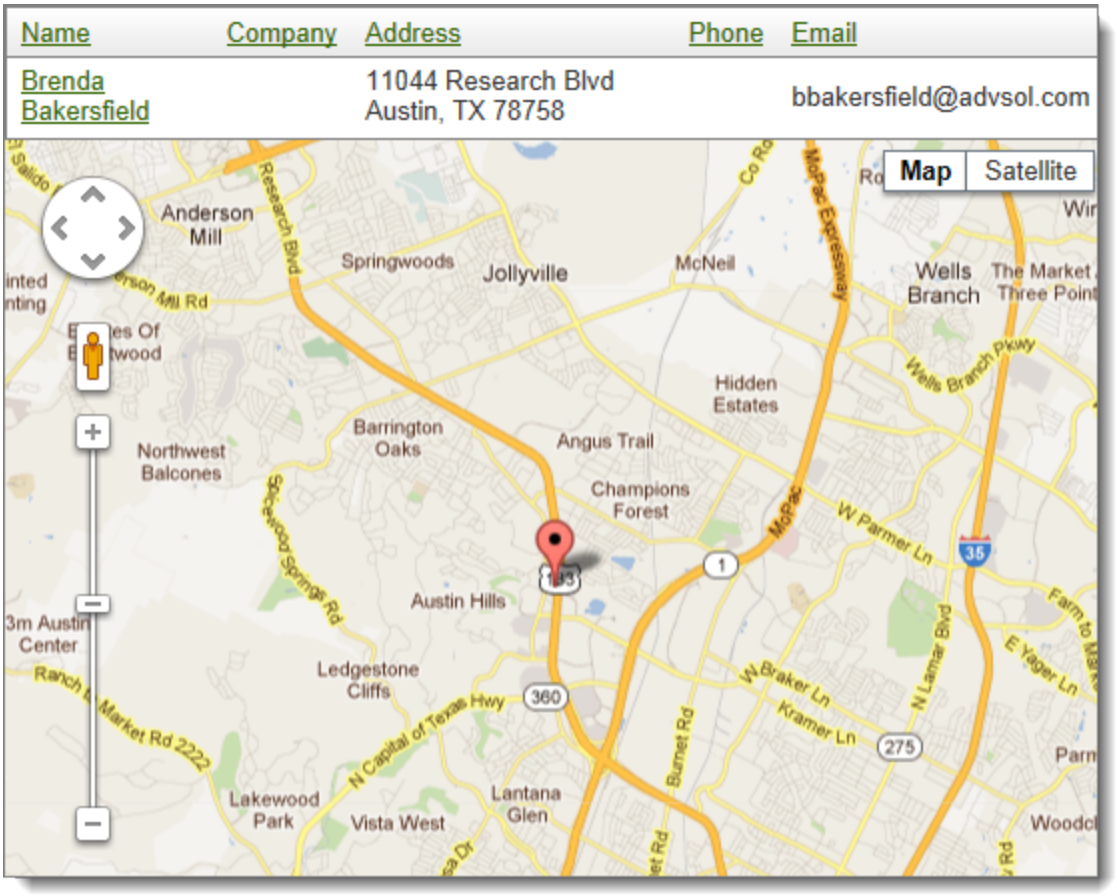
The Query Menu iPart lets you merge query results into your site for tremendous utility. You can set the iPart to display a query, set with whatever title, parameters, columns, labels, and sorting you need, and you can enable exports, which adds icons for sending the data to Word, Excel, PDF, and CSV.

You can also organize helpful queries into a folder and point the iPart to that folder. When the page loads, the iPart displays the first query at the top of that folder, and it presents a drop-down menu of additional queries available, organizing them by subfolders, if any. When the user clicks on a query from the menu, the iPart immediately runs that query and displays the results.



If the query selected contains an address property, you can configure the iPart to automatically map the query results when an address is available. Only one address property per query can be mapped. When this option is enabled, the iPart looks for the following

address properties in this order and maps the first one it finds: FullAddress, Address, FullAddressText, AddressText, Address Text, and Full Address Text.



Related Items iPart

With the Related Items iPart, you can display a list of profile or product pictures based on the results of an IQA query. For example, you can write a query to display the profile pictures of everyone who has registered for an event, made a donation, or ordered a particular product, or to display products in the same category. You can configure the list to display horizontally or vertically, to display a name for the item, and to choose the size of the image. You also have the option to make the profile picture a live link that opens a URL of your choosing, such as the member profile page.

Guidelines for working with the Related Items iPart

- The pictures displayed in the iPart are based on iMIS product or contact IDs. When creating the query for this iPart in IQA, you must select a property that returns an iMIS product or contact ID on the (Display tab). Give this property an Alias of key_Id (the Alias is case sensitive).
- To define the image to display for each record, include a column in your query that specifies the image file name for that record. Give this property an Alias of Image.
- To display a name for each record, include a column in your query for the name of the item or contact. Give this property an Alias of Name.
- When you add Display columns to the query in IQA, they become available within the iPart as Filter columns to filter on.
- You can dynamically filter the query results displayed in the iPart based on the value of another iPart's URL parameter. For example, you can set up your donation page to display the profile pictures of people that have donated to a particular cause (called a distribution in iMIS). The Donation Creator iPart uses the URL parameter itemid to determine which distribution the donation should go towards. If you add your iPart to the same content record as the Donation Creator, then you can set up the Related Items iPart to look at the value of itemid to determine which profile pictures to display. You just have to make sure that your query includes the CsActivity.Product Code property, so that you can select it as a Filter column on the iPart's configuration page. Once selected, enter itemid for the Filter on URL parameter, so that the iPart knows to filter the results based on that URL parameter's value.

  Example: Display other products in the same category

  In this example, the Related Items iPart is set up to display clickable images for other products in the same category as a particular product. This example uses content installed for the sample Member site.

  Go to Content Designer > Manage Content:

1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > RelatedItems. Select RelatedProducts.
4. Filter Options dropdown, select ProductCategory. ProductClassKey.
5. Filter on URL parameter, type in Category.Class.
6. For the Items link to (URL or shortcut), type in ItemDetail?iProductCode={key_Id}&Category={ProductCategory}.ItemDetail?iProductID={key_Id}&Class={ProductClassKey}. This uses the ItemDetail shortcut to link each item in the list to the product page. The particular item's product ID and category are specified in URL parameters so that the correct product and related products are displayed in the resulting product page.
7. Click Save & Publish to complete the content record.

Example: Display other users who have purchased a product

In this example, the Related Items iPart is set up to display clickable profile pictures of other users who have bought a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Content Types > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > QueryProfilePictureList. Select Orders.
4. Filter column dropdown, select ProductCode.
5. Filter on URL parameter, type in iProductCode. iProductID.
6. For the Items link to (URL or shortcut), type in MBR/Party.aspx. This redirector web page looks for an ID in the URL parameter and then checks the ID's party type and the user's permissions to determine which content record to display. The user's ID is appended to any URL specified in this field.
7. Click Save & Publish to complete the content record.

Progress Tracker iPart

With the Progress Tracker iPart, you can visually display progress towards a goal based on the results of an IQA query. For example, connect this iPart to a fundraising query, so that your members can easily track the progress of a fundraising effort towards a specific goal. Or connect it to an events query, so that you can see at a glance how many people have registered for an event.

To set up the Progress Tracker

1. Create a query for the Progress Tracker.

   Note: For sample queries that will work with this iPart, see $/Samples/ProgressTracker/ in IQA.

The Progress Tracker uses three pieces of information supplied by an IQA query: a goal amount, the sum total of what you are tracking, and the end date (which is optional). When you build your query for this iPart, it must contain specific aliases. In IQA, create a new query and choose the business object you want to query on. Make sure you are in Advanced Mode, then from the Display tab, choose properties to assign the following aliases to:

- Goal_Amount: Indicates which property is the goal amount. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST(25000 AS INT) as a property to set the goal amount to 25,000.
- Sum_Total: Indicates which property is the amount to be summed. The percentage displayed in the Progress Tracker is based on this amount compared to the goal. It can be a monetary amount or any other number, such as the number of event registrations.

  Tip: From the Function dropdown list for this property, select Sum, so that only one row is sent to the iPart. This is not required, but it will improve performance.
- End_Date: Indicates which property specifies the end date. This alias is only required if you want to display an end date in the iPart. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST('2012-12-25' AS DATE) as a property to set the end date to 25 December, 2012.

2. Add the iPart to a content record and configure it.

   Go to RiSE > Content designer > Manage content:

1. Do one of the following:

- Select a Content Folder and click Edit.
- Select New > Website Content.

2. Click add content.
3. Go to ContentTypes > Utility.
4. Select Progress Tracker.
5. Click OK.

6. Enter the iPart CSS class to style the Progress Tracker. Two styles have been pre-defined that you can use in the iPart: ProgressTracker and ProgressTracker2. You can edit these classes to change the look and feel, or you can create your own style for the Progress Tracker.
7. Select a Source query.
8. (optional) Select a data column by which you want to filter. You can use this feature to dynamically update your Progress Tracker, based on the value passed to it in the URL. If you choose to filter on a data column, then also enter the name of the URL parameter, which the iPart uses to identify the value to filter on. For example, to limit the results of an event query to a specific event, you can select the EventCode property and give the URL parameter a name such as EventCode. The progress displayed will then reflect only the event code which is included in the URL as EventCode=[EventCodeValue].
9. (optional) Enter any messages you want to appear in the iPart. The variables below can be used in the descriptions. For example, "Help us reach our goal of {0} new members by {2}!"
   - {0} displays the goal total
   - {1} displays the current sum total or count
   - {2} displays the end date in a long format
   - {3} displays the end date in a short format
10. Select the Caption Options. In addition to the progress bar, you can also display the values as text. If any of the Caption Options are unavailable after selecting a query, this indicates that the required aliases have not been defined in the query.
11. Select the Progress bar location. The bar can be displayed above or below the captions.

    Note: You can also use this iPart to display only a countdown (days remaining to a certain date). In configuration, only select the caption option Display days remaining, then for the Progress bar location, select (None).
12. Click OK.

SSRS Report iPart

The SSRS Report iPart lets you display the results of any IQA query on any page where you place it. The SSRS iPart uses the version 10.0 ReportViewer, which supports IE8 natively and, in IE8, adds a Print button on its toolbar. You can add the SSRS iPart to any content page using CM: open the Utility folder and choose the content type SSRS Report.

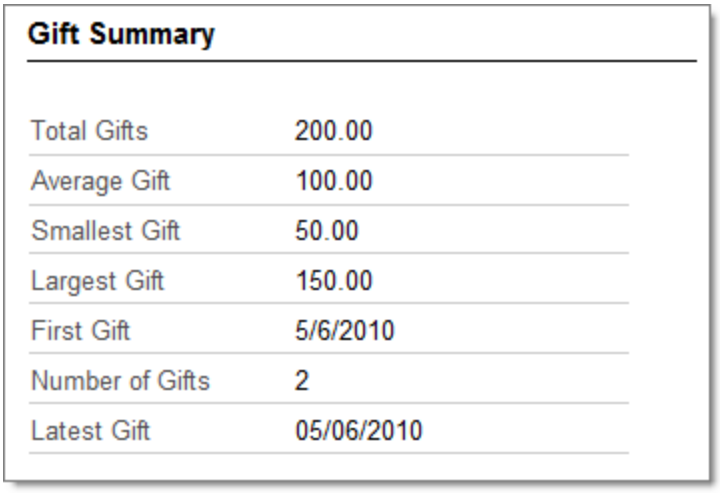
The iPart lets you customize whether to display the export buttons for PDF and Excel versions of the report. You can change the default design (layout, colors, fonts) of your reports by editing the SSRS parameters in the SystemConfig table.

How it works: The process engine specified by the iPart loads a report template (.RDL file) from the document system and creates a report data source (a DataTable) based on an IQA query's SQL source; the report viewer then combines the template and query to generate the report's output. When you configure the iPart, you specify the Document system path to the SSRS Report runtime, which must be a link to an SSRS Process Engine. Click the select link next to the textbox, then browse to your reports (such as $/Samples/ReportingServices), and pick one of the runtime entries.

Tip: Identify a process engine (run-time report) by the arrow on its icon!

Summary Display iPart

The Summary Display iPart displays a single row of query results in a form view.



Gift Summary

Total Gifts	200.00
Average Gift	100.00
Smallest Gift	50.00
Largest Gift	150.00
First Gift	5/6/2010
Number of Gifts	2
Latest Gift	05/06/2010

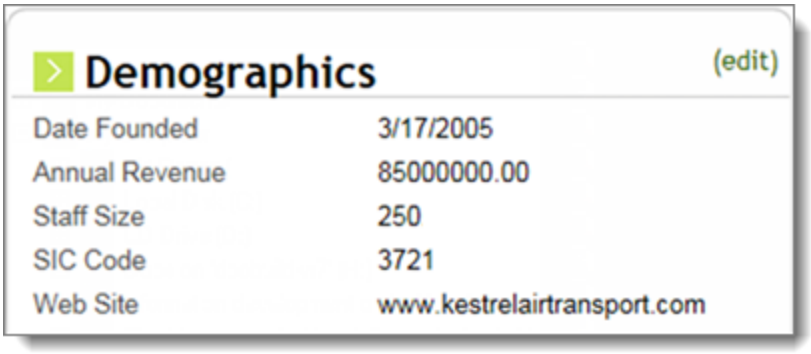
Guidelines for queries displayed in the Summary Display iPart

When creating a query that you want to display in the Summary Display iPart, keep the following guidelines in mind:

- This iPart only displays a single row of query results.
- If you connect the iPart to a query that returns more than one row of results, only the first row is displayed.
- Tip: You can dynamically filter your query results by the currently logged in user, a selected contact, or a date. See Adding dynamic filters to queries for more information.

Panels and custom data

Panels are custom displays of iMIS data that you are able to name, build, arrange in grids, and add to your site. Using panels, your users can browse, edit, add, and delete their data, as you specify:



Panels display within Panel iParts, which allows your users view and edit custom data on the broadest range of browser and platform types that iMIS supports. You can manage your custom data directly and conveniently from the web pages where you place these iParts:

- Panel Editor (which creates panels and shows one panel) --
- Panel Collection Editor (which combines existing panels into tabbed displays)

You can configure the iParts to let your users add and edit that data directly from their browser page. You can import your existing user-defined tables (from iMIS Customizer) directly from the Panel Editor iPart configuration. In addition, your Activity table data is

automatically available as a source, so that you can use and extend that data. Panel sources can include existing user-defined tables (defined in the UD_Table table) and user-defined sources (listed in the ObjectMetaData table).

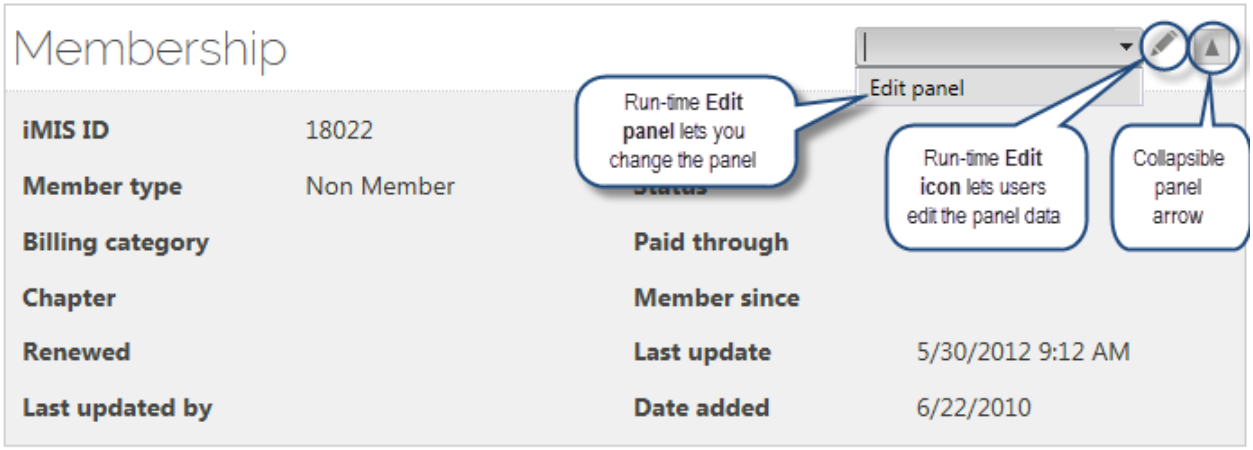
Tip: Panels are shared: when you update one panel, it updates within every iPart that uses it.

Creating custom panels of data

In a few clicks from your browser, you can have a new panel that displays the data you want, labeled and made editable as you need.

1. Enable Easy Edit by clicking on the button at the top right hand corner of the screen.
2. Once Easy Edit has been enabled, you will find and click the icon at the bottom left corner; this is the Content Designer.
3. From the Content Designer, click add content > ContentTypes > Content > Panel Editor
4. Select (New Panel) from the Panel drop-down menu.
5. Drag in and arrange your desired data, then Save & Publish.

   Once you have placed a panel iPart into a content record and published it, you can then edit the panel directly: As a system administrator, you see a run-time Edit panel command, which lets you make quick changes to the panel, changes that save and publish for you automatically. For extensive panel work, such as to change the type of data it shows, use Easy Edit to access all of the content design features.



Best practices for panel layout

Here are key layout features to help you design the best use of screen real estate on the page:

- Multiple columns: Click + or – icons next to the panel layout to add/remove columns in your panel. For best display results, place multi-column panels into single-column content records.
- Hide in Summary View: Check this box on certain properties to trim the initial display of the iPart to the read-only information that is most useful. Only when users open the full window for viewing or adding/editing (as you configured it) do they see the additional information.
- Read-only: Check this box to provide information in read-only form while still allowing users to edit other information on the panel.

  Tip: To prevent editing of all of the properties, simply disable Allow users to edit on the iPart Configuration, rather than in the Panel definition.
- Collapsible panel: In order to maximize utility and minimize scrolling on the page, users are able to click on the arrow to expand and collapse iParts.

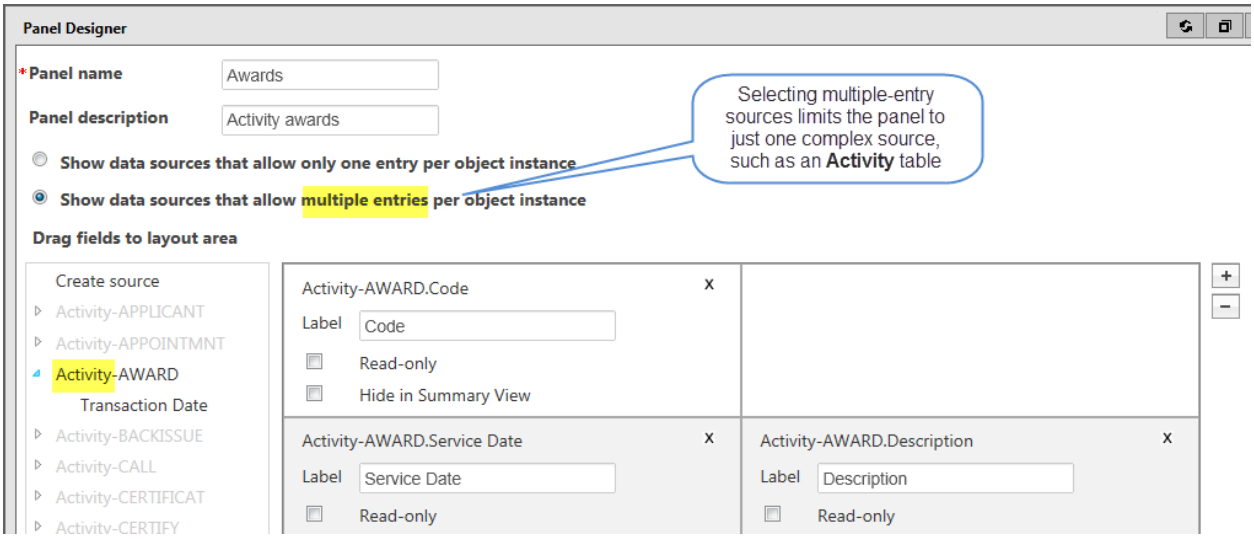
  Tip: Be sure to add an optional Title to any iPart that you make collapsible, so that title bar text guides your users as to what information they will access by clicking Show.

Panels for Activity data

Most organizations need to show activity information on their websites. All of the Activity data in your iMIS database appears as complex (multi-entry) sources when you use Panels.

Suppose you created new award types in the general lookup table called AWARDS and want to add them to a page for dynamic editing. In a few clicks, you can have exactly that:

1. Enable Easy edit.
2. Click add content.
3. Go to ContentTypes > Panel Editor.
4. Click OK.
5. In the Panel list, select (New panel).
6. Select Show data sources that allow multiple entries per object instance.
7. Drag in your new data sources.
8. Click Save & Close.
9. Select Allow users to edit.
10. Click OK.
11. Click Save & Publish.



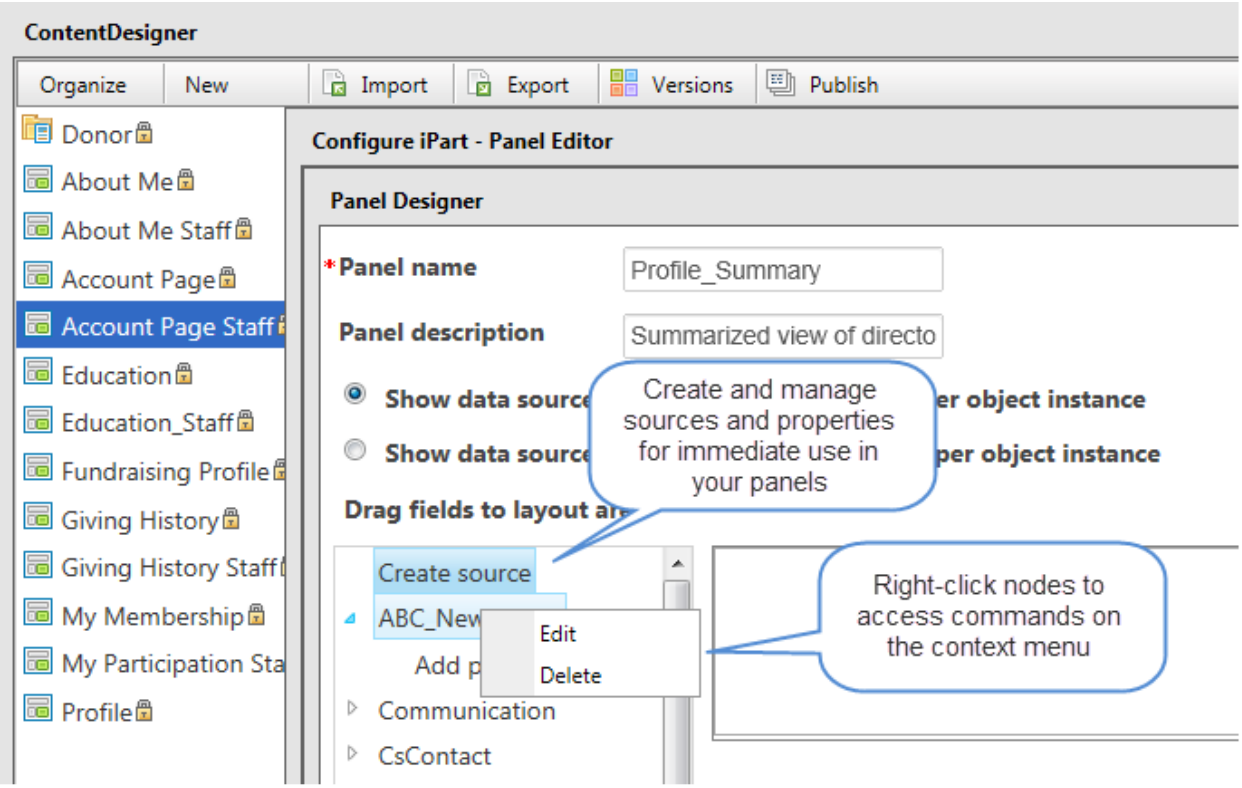
All of your Activity data appears as available sources when you select multiple entries for the type of data source.

Tip: If you want to combine data from different sources, be sure to show simple sources (the first radio button option). Only one complex table can display in a panel, so the others are grayed out as long as any one of them has properties placed in the panel.

Defining your own data with Panel Designer

With the Panel Designer, you can not only craft reusable panels that combine fields from many tables, but you can also define new data structures (business objects and properties) to manage information for your organization. Without special tools or knowledge of the iMIS schema, you can add data sources on the fly, right from your browser. When you save the panel, you have saved your newly created data sources as iMIS business objects.

Tip: You can see your new data source show up as a business object in Business Object Designer, but it will be read-only: continue to edit and manage these special sources in Panel Designer itself.



Access the Panel Designer by editing or creating a panel in a Panel Editor iPart.

To create a new panel source and properties

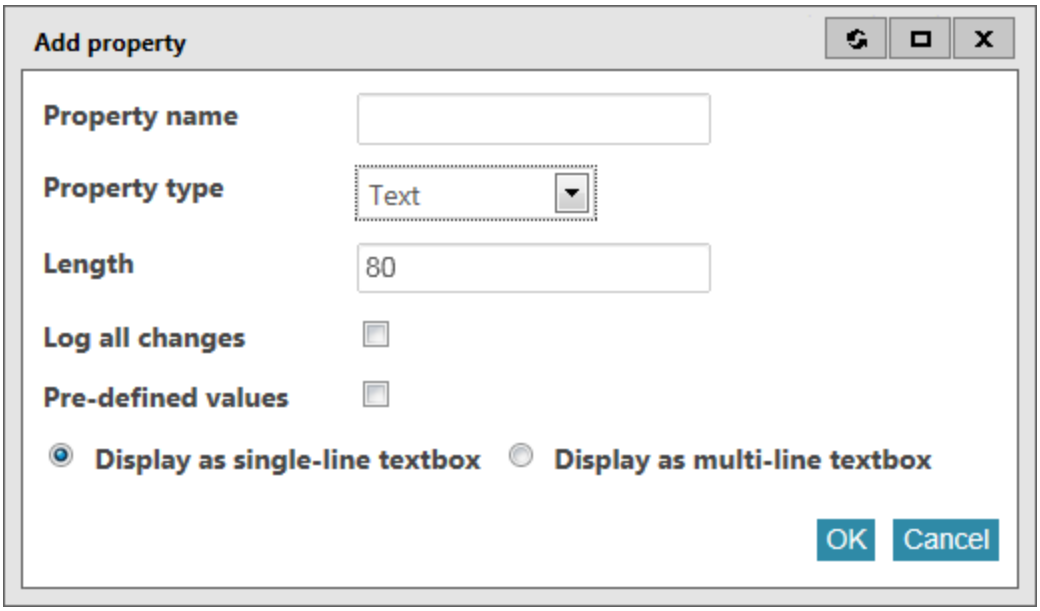
To create your own data source with properties, you work within Panel Designer. Each new source you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

1. Select New > Website Content.
2. Click add content.
3. Go to ContentTypes > Content.
4. Select Panel Editor.
5. Click OK.
6. From the Panel drop-down list, select (New panel).
7. At the top of the source tree, select Create Source.
8. Choose a Name for each new Source that meets these criteria and click OK:

- Starts with a letter
- Contains only letters, numbers, and underscores
- Is unique across iMIS, not matching any existing iMIS data or SQL Reserved Words

  Tip: Use an organizational prefix (such as ABC_*) so that your sources are unique, sort together in the tree view, and are easy to identify as ones that you created.

9. Select Add Property for the new source added.



10. Enter a Property Name.
    - Starts with a letter
    - Contains only letters, numbers, and underscores
    - Is unique within its Source
11. Choose a property type that best fits your purpose, within these valid ranges:
    - Currency: 19 total digits (precision), with 4 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Date, Date and Time, Time: January 1st, 1753, through December 31st, 9999
    - Decimal: 28 total digits (precision), with 12 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Email: Creates a mailto link, which launches the user's default mail application when selected.
    - Integer: -2,147,483,648 to 2,147,483,647 (±2 billion)
    - Text: By default, the Text Property type allows:

- Free-form entry up to 400 characters (defaults to 80). You can select to display the text-box as a single line or multi-line textbox.
- Pre-defined values from a query or explicit list that display as a drop-down list at runtime:
- Query – For example, you may want to use a query that returns a list of countries.
- Explicit List – For example, you can add a list of colors the user can select as their favor-ite.
- URL: Creates a live hyperlink, which launches a new instance of the browser to open the link when selected.
- Yes/No: Boolean

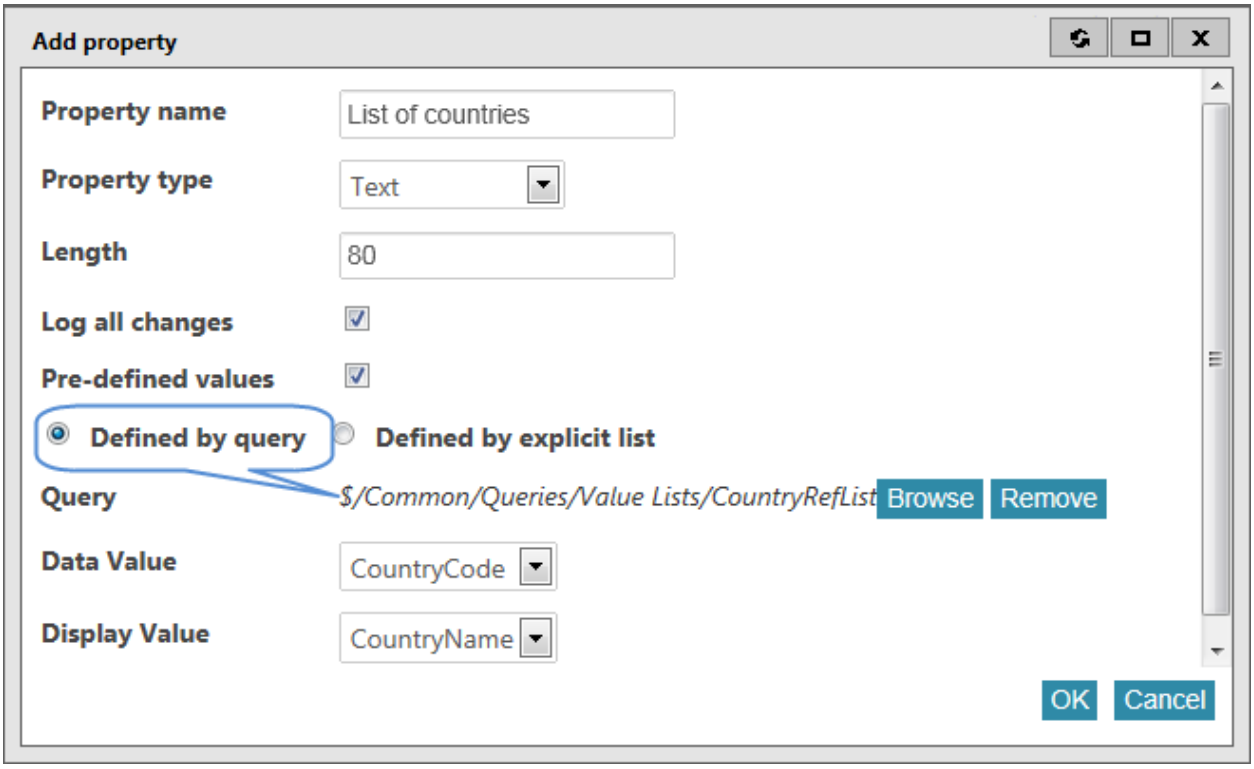
12. Enable the Log all changes if you want to track any data change made to the property you are adding.

    Hint: Add the Change History Display iPart to a content record if you want to display data changes made in the Name and Name_Fin tables as well business objects.

13. (Text Property type only) The Pre-defined values option allows you to present a list from which the user can select.

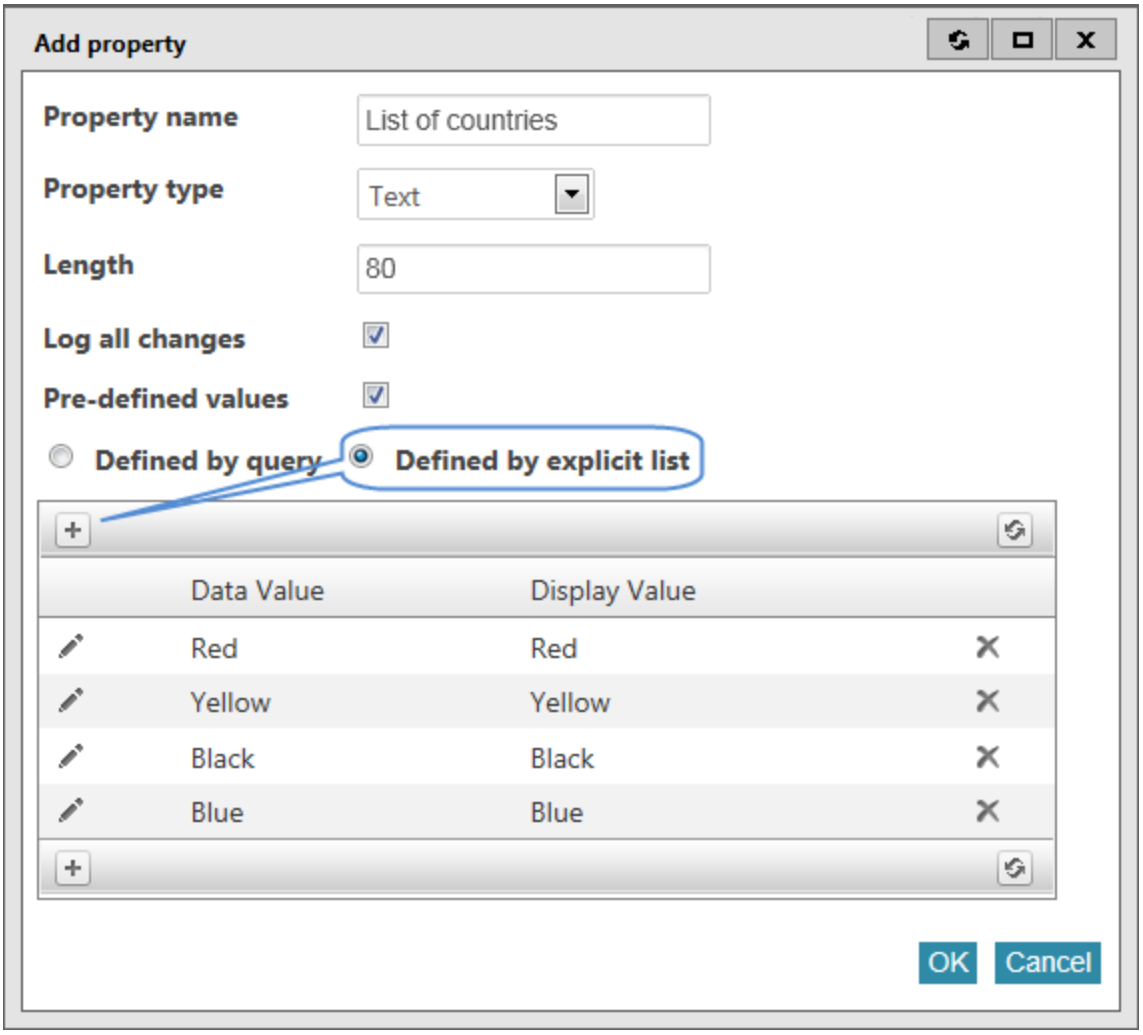
    - The Query option provides validation-type properties based on the query results. For example, instead of typing out a list of countries, you could select a query that displays country values.
    - Enable the Pre-defined values checkbox and select the Defined by query option.
    - Click Browse, select a query, and click OK.
    - Two additional fields display, Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel. For example, the country code may not be as clear as the country name.

- Select the fields from the drop-down list in the Data Value and Display Value fields.
- Click OK.



- The Explicit List option allows you to create a list to display on the panel. For example, you may want a user to select their favorite color.
- Enable the Pre-defined values checkbox and select the Defined by explicit option. A table grid displays.
- Click + to add a data row. The data row contains two icons: Insert and Cancel, and two fields: Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel.
- Enter the appropriate values in the Data Value and Display Value fields.
- Click the checkmark located to the left of the data row.

- Click + to add additional data rows.
- Click OK.



14. Drag the field(s) to the layout area.
15. Save the panel to save the source and properties. Once you save a property, you cannot rename it. Note that the sources will alphabetize properly on reopening.

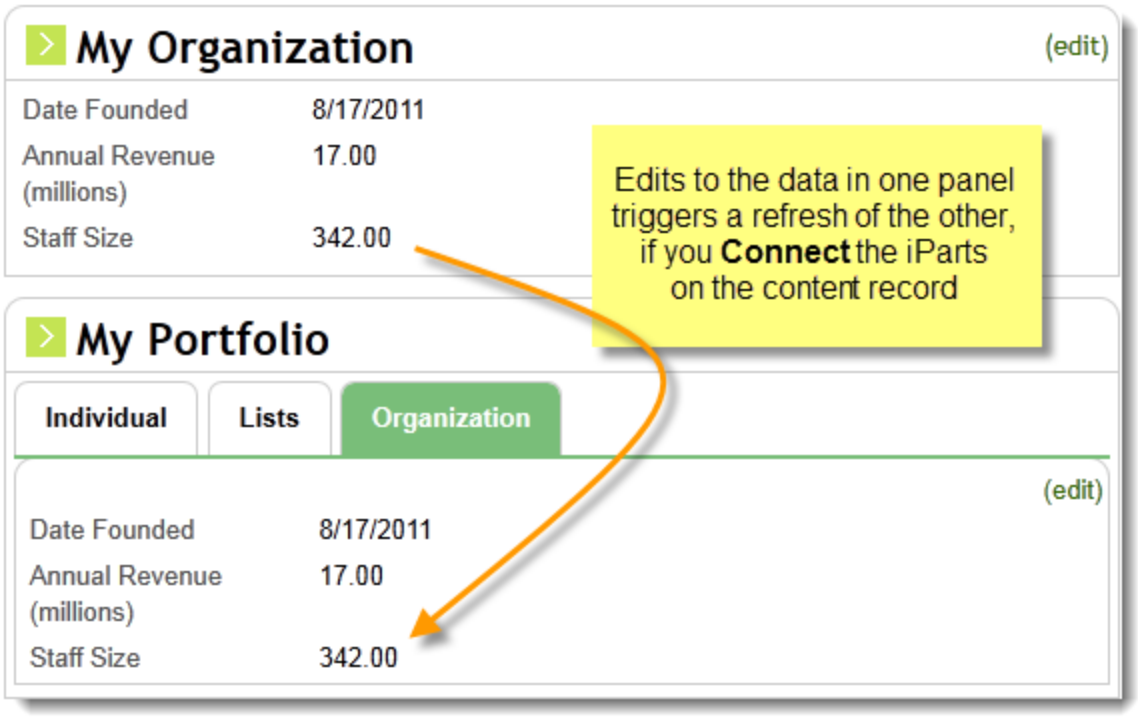
    Each new property you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object property is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

Tip: Do not save until you create all of the properties. This way, you can view them as a set of properties and improve your naming convention before it is finalized.

16. Save and close the Panel Designer window.
17. Save & Publish the content record.

Connecting iParts to refresh panels

When you combine panel-displaying iParts on the same content record, data might appear out of sync after the user edits it, if both panels display the same property. You can solve this refresh problem through the iPart's Connect feature, which you enable separately from Configure.



Note: Check an iPart's Configuration Help topic to find out if it supports any connection options. An iPart has no connection support (neither consumer nor provider) unless its author added it.

To connect panels for dynamic updating

1. Edit a content record and add two user-editable iParts that display panels (Panel Editor, Panel Collection Editor).
2. Set up the first connection:

- From the first iPart's title-bar menu, select Connect.

  The Connect box that opens shows you any current connections and lets you disconnect them.

- Select Create a new connection.

  The Connect box that pops up prompts you to create one of four connection types.

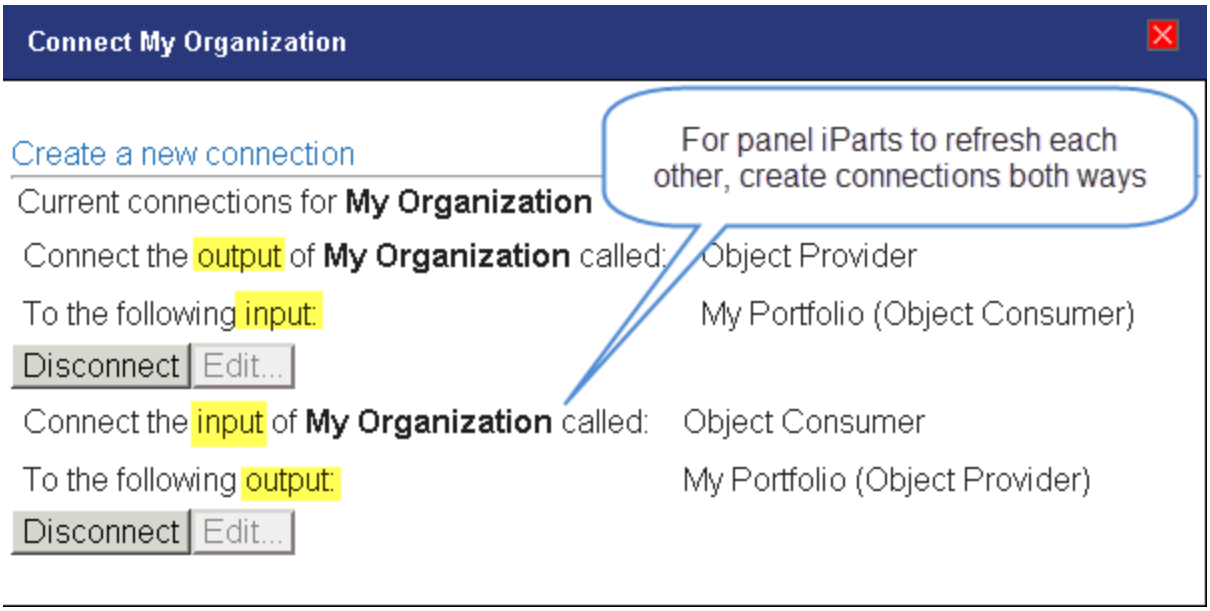
  Tip: Do not be misled by the language of connection. The Consumer is the actor that triggers a refresh on another iPart, and the Provider provides a pointer to itself to the Consumer.

- From the Object Consumer drop list, select the panel iPart you want to refresh.
- Select Connect.

3. Set up the second connection:

- From the second iPart's title-bar menu, select Connect, and select Create a new connection.
- From the Object Consumer drop list, select the first iPart.
- Select Connect.

  You should see a pair of connections, for mutual refreshing.



4. Save and Publish the content record.

Adding existing business objects to panels

Panel Designer lets you create new data sources on the fly, access any user-defined tables, and make full use of the Activity table. It can also display your existing business objects, if they meet these requirements and configuration settings:

Referencing existing business objects

Panel Designer can display existing business objects that have a ContactKey or ID property. When ContactKey or ID is the primary key, Panel Designer treats it as a single-instance table; otherwise, it assumes it to be multi-instance.

Panel Designer cannot display your business objects until you add them to the ObjectMetaData table. While attached to the iMIS database in SQL Server Management Studio, run this SQL statement:

INSERT INTO [dbo].[ObjectMetaData] (ObjectName, RelatedToEntity, IsUserDefined, IsMultiInstance)

VALUES ('MyObject', 'Party', 0, 0)

- Replace MyObject with the name of the business object, table, or view that is related to Party.
- Change the last value to 1 if it is multi-instance.

Settings for Business Object Designer (BOD)

1. In Business Object Designer, edit your object and open the BOD (Properties tab) > (Display tab).
2. To make a property available to your panels, enable its Available to UI? option.

   Tip: To see your BOD changes immediately, restart IIS.
3. To enable multiple selection for a property, select Check box(es) under Display Control so that you can enable the Allow multiple selection? option.
4. To enable HTML editing, select HTML Editor under Display Control. Be sure to use the property in a single-column panel to provide the control adequate width.

   Troubleshooting

   If you get an error when creating a new data instance at runtime (either single- or multi-instance), check that your business object does not have a 'Read-only' constraint set on the ContactKey or ID property's Definition tab.

Connecting picture iParts to Facebook

You can set up the Contact Mini Profile and Contact Profile Picture iParts to prompt people to use their Facebook profile picture in iMIS, instead of uploading a picture. To use this feature, you must do the following:

- Contact your Hosting Administrator to enable Enable the Facebook feature in the web.config file
- Create a Facebook app so that your website can connect to Facebook
- Enable the iPart configuration option to Prompt for Facebook connection

When enabled, signed in users are prompted to connect to Facebook when they edit their profile picture and wherever their profile picture is displayed.

To create your Facebook application and use it in iMIS

1. Contact your Hosting Administrator to request that they do the following: Edit your web-site's web.config file, located by default in C:\Program Files\ASI\imis\net. Find the EnableFacebookApi property, and change the value to true.
2. Create your Facebook application.

- Log in to the Facebook Developers site.
- Click +Create New App.
- Enter an appropriate App Display Name and App Namespace for your organization. Only the App Display Name will be visible to users.
- Click Continue and complete your App creation.
- On the Basic info page for your App, enter the Site URL for your iMIS application.
- Take note of the App ID Facebook has created for you.

3. Contact your Hosting Administrator to request that they do the following: Add your Face-book App information to the required iMIS JavaScript.

- Edit your iMIS Facebook.js file using a text editor. By default it is located in C:\Program Files\ASI\imis\Net\AsiCommon\Scripts\SocialMedia.
- Find the appId value and update it with the ID issued to you by Facebook.

To load the Facebook API

1. Edit your website's master page. By default it is located in C:\Program Files\ASI\im-is\Net\App_Themes.
2. Add the following html within the <body></body> tags of your master page:

To enable the Facebook connection in iParts

Configure each instance of the Contact Mini Profile and Contact Profile Picture iParts used in your website to enable the options Allow picture change and removal and Prompt for Facebook connection.

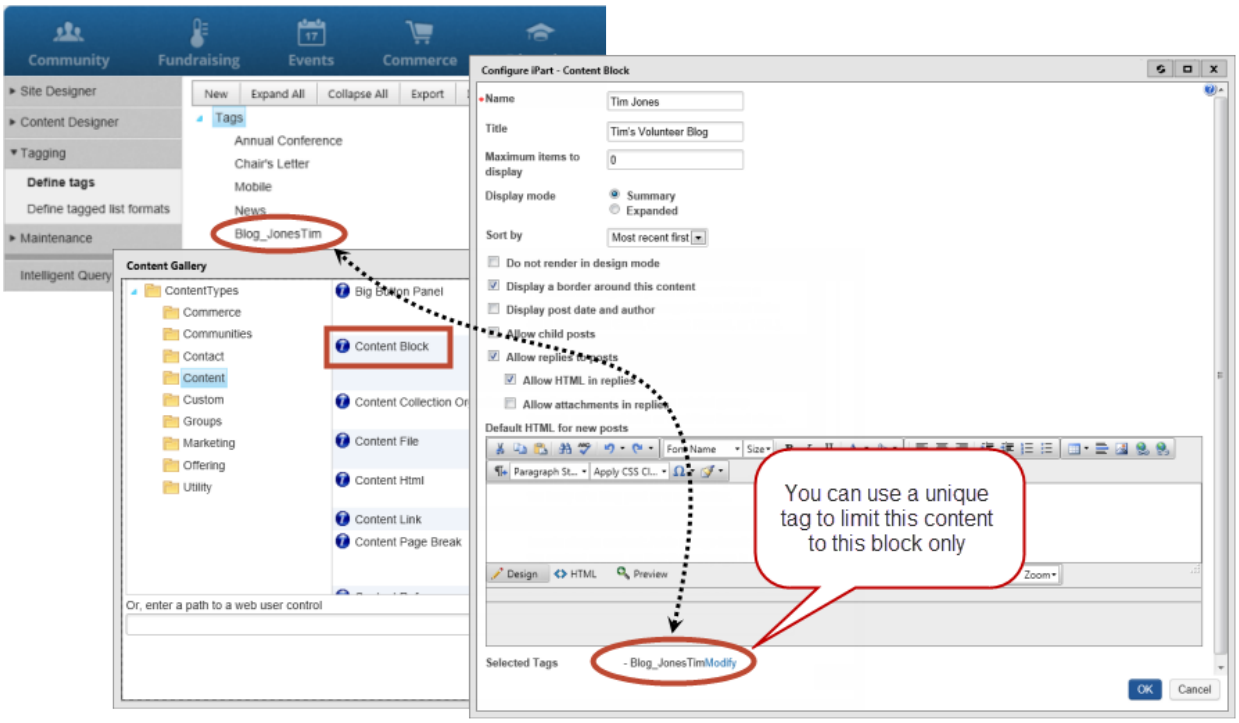
Note: When the Facebook feature is disabled in the web.config file, the Facebook options do not appear in the Contact Mini Profile or Contact Profile Picture iParts.

Using the Content Block iPart

With the Content Block iPart, you can empower authorized users to create and edit content directly on a page, without using Easy edit or accessing Tools. Through iPart configuration, you can allow users to insert HTML content, add attachments, create child pages, and submit replies. At its simplest, a content block can be HTML that is read-only unless the user has permissions to see the edit command. At its most complex, a block can act as a message board with multiple posts, child posts, and replies. You can limit the number of posts to a set number, or you can leave it at the default (zero), which lets it grow indefinitely.

Tagging to filter content

To control what content appears in a Content Block, you create tags specific to ContentBlock Items and apply those tags to specific instances of the iPart. For example, if you want to create a new blog for Tim Jones, you could create a ContentBlock tag such as blog-JonesT, place a new Content Block iPart on a content record, and configure the iPart to display the tag blog-JonesT. Now the content that Tim authors in this blog will be unique to his+ blog, if you do not apply this tag anywhere else:



Content created with anything other than a Content Block iPart will not be displayed, even if it has the same tag. For example, a content record containing HTML tagged with News will not show up in a Content Block that is also using the News tag.

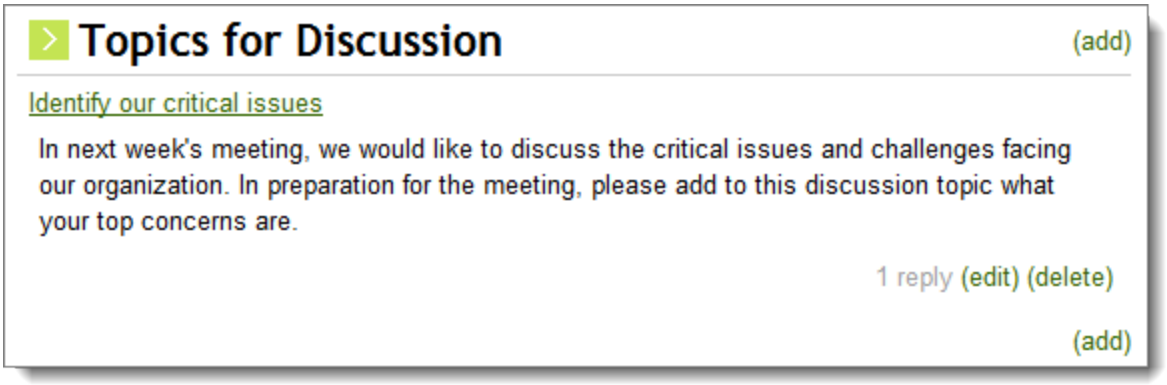
Best practice: Plan for and create the tags you want to use before configuring your Content Block iParts. Content can seem to disappear if you change the tags assigned to a content block already in use, because it no longer matches the tag set currently configured.

Creating a message board

Only users with the Content Editor permission may create posts and children, but any authenticated users can reply to a post and edit or delete their own replies. Any authenticated user may create posts and children, reply to a post and edit or delete their own replies.

To use the Content Block as a message board with multiple posts, child posts, and replies, make use of the following configuration options:

- Maximum items to display – Choose the maximum number of posts that will be displayed; 0 indicates an unlimited number of posts.
- Display mode – Expanded display mode will display replies and child posts in-line, while Summary mode only shows replies and child posts when the post is opened.
- Allow child posts – Allow Content Editors to add a child post to existing content. Allow any authenticated user to add a child post to existing content.
- Allow replies to posts – Allow authenticated users to reply to posts; you may indicate whether to allow HTML and/or attachments in the replies.



Content Block iPart set up as a discussion board

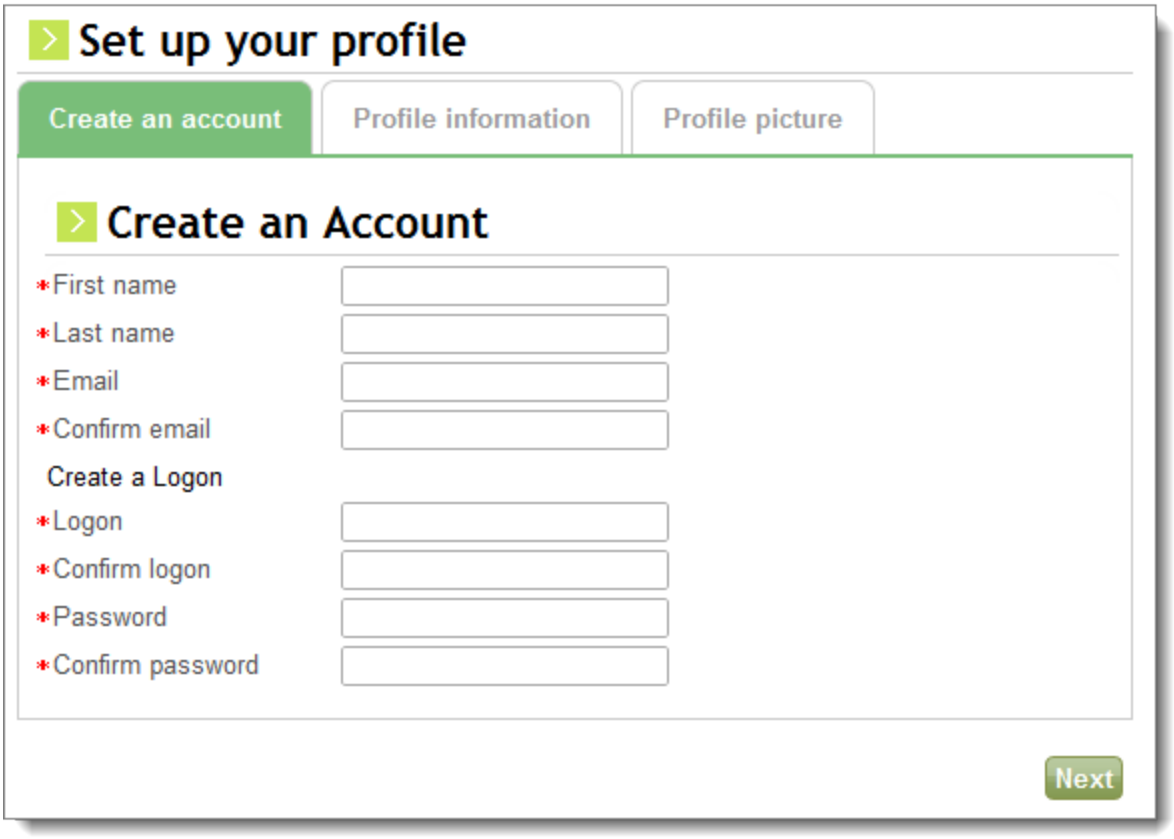
Using the Content Collection Organizer

Use the Content Collection Organizer to create a collection of pages and assign names to the tabs or headers for each page. In the simplest example, those pages are displayed,

the user can access tabs in any order desired, and information is saved independently on each page. The following screenshot shows an example with tabs across the top, configured to display different content pages.

Using the Content Collection Organizer as a Wizard

You can configure the Content Collection Organizer to function as a wizard, which will guide the user through multiple steps. When enabled, Next and Previous buttons display, allowing users to navigate between the steps, as shown below. The user can navigate to any previous tab, but forward only to the next tab in the workflow sequence. The user can also navigate with the browser's Forward and Back buttons, but the data does not commit until the user clicks Next.



Each page in the workflow is validated when the user clicks the Next button. Each iPart's page.Validate method is processed in the order the iParts appear on the page. The order of calls is:

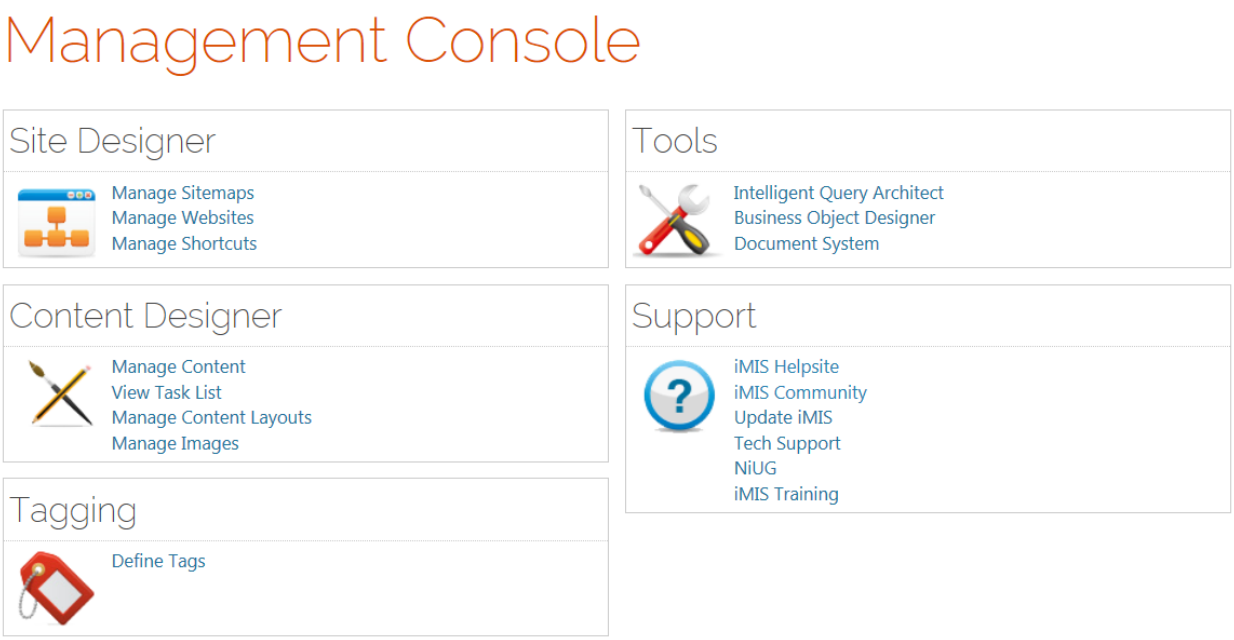
- Validation
- If Validation passes, then PreCommit
- If PreCommit passes, then Commit

If any of the calls fail (the data on a page is incomplete or incorrect), then an error message displays and the user cannot move to the next step until it is corrected.

Using the Big Button Panel iPart

With the Big Button Panel iPart, you can display a navigation panel that combines a larger, category-defining image with a list of links, as shown in the screenshot below. You

can also use this iPart to create links that make it easy for staff to perform routine tasks for contacts such as running reports, registering for events, and ordering on their behalf.



Example: Working On Behalf Of contacts and running reports using the Big Button Panel

In this example, we will set up the Big Button Panel on the account page, so that staff can select a contact from the Directory, then quickly run a report, register for an event, make a donation, or order a product for that contact.

1. Edit the account page that displays after a staff user selects a contact from your directory. In the Member site, it is the Account Page Staff content record.
2. Add the Big Button Panel (add content > ContentTypes > Content > Big Button Panel) iPart to the content record and configure it with the following settings:

- Mode: Actions
- Add an action link to run a report:
- Link Text: Print Info
- Link Target: Enter a link to a page that contains the SSRS Report iPart that displays a report such as $/Samples/ReportingServices/MemberProfileQuery_Report.

Note: The SSRS Report iPart must be configured to Hide the parameters section and to enable the option to Inspect query string for parameters. Do not enable the option to Inspect Session for parameters. For more information about SSRS reports, see Creating SSRS reports.

- URL Parameter: ContactKey=@SelectedUser
- Add an action link for event registrations:
- Link Text: Register for an event

  Note: Customize this text for the event you want to register the contact for. For example, Register for the Spring Conference.
- Link Target: Enter a link to the event page
- URL Parameter: EventKey=XYZ (replace XYZ with an event code) EventKey=XYZ (replace XYZ with an event key)
- Use On Behalf Of: Enable
- Add an action link for donations:
- Link Text: Make a donation
- Link Target: Enter a link to your donation page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable
- Add an action link for the shop:
- Link Text: Purchase a product
- Link Target: Enter a link to your Shop page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable

3. Save and Publish the account page.

Using the Group List Editor iPart

The Group List Editor provides a flexible tool for you to display and manage lists of groups, sub-groups, relationships, and/or memberships. You can configure it to serve several different purposes.

Display an organization's roster

A common use for the Group List Editor is to display a list of contacts that belong to an organization.

For example, add the iPart to an organization's profile page, so that the iPart displays memberships for the selected organization. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the roster
- Clicking on a contact opens their profile page: Enable to link contact names directly to their profile page
- Provide option to view and edit membership details: If you want users to have easy access to both the account pages and the Group Member Detail window, also enable this option. Users can click an icon to switch between these options.
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups owned by the parent ID and their members
- Choose the group types to include: Organization
- Automatically create a group if one does not exist: Enable if you have allowed editing (this allows the creation of new rosters)
- Group owner type: Party
- Group type to auto-create: Company
- Choose the group types to include: Ensure that Company is selected

Display a contact's memberships

Another common use for the Group List Editor is to display a list of a contact's memberships in groups such as committees and chapters.

For example, add the iPart to a contact's profile page, so that the iPart displays memberships for the selected contact. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the contact's memberships
- Clicking on a contact opens their profile page: Not applicable
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups that the parent ID is a member of
- Choose the group types to include: Select the group types you want to display, such as Chapters and/or Sections

Relationships in the Group List Editor

You can easily create a link between two contacts using the Group List Editor iPart. The relationships you define show up on the record of both contacts, and you can specify roles for one or both of the contacts. For example, if you edit Jean Smith's record to indicate that she knows Russell Smith, then that relationship will also appear in Russell Smith's record. Alternately, if you edit Jean's record to indicate that Russell is her child, you can also specify that her role is the parent of Russell. Then Russell's record will reflect that Jean is his parent.

There is no limit to the number of relationships you can create or the types of relationships you can create. We have provided a few relationship types out-of-the-box, but you can add additional ones if needed.

Only users with System Administrator or Staff privileges can create relationships between contacts, but any user can view a list of relationships.

Note: To use this relationship feature, you must have the RELATION license.

The following sections walk you through how to create relationship types and how to set up the Group List Editor to display relationships.

Creating relationship types groups and roles

Edit the Customer setup table for Relationship types, adding the relationships that you want to have available in the Group List Editor. For each relationship type you add, you can also define a Reciprocal relationship, which the Group List Editor automatically populates as a set (such as for Parent and Child).

To display and edit relationships in the Group List Editor, you must define a Relationship Group and Roles (relationship types) associated with that group. A sample relationship group type named Connections has been provided. You can create your own group type from Setup > Groups > Types. If you create your own group type, the only requirement is that you select the Relationship Group checkbox, so that the Group List Editor can properly display relationships.

To create Roles used in relationship groups

1. Decide which relationships you want to be able to define for users. For example, Parent-Child, Husband-Wife, etc.
2. Create Roles for each relationship type.

- From Setup > Groups > Roles, click add.
- Enter the Name of the Role and a Description of the role.
- Select the Active checkbox.
- (optional) Select a default Reciprocal Role for this role. For example, if you are creating a Parent role, you may consider selecting Child as the default Reciprocal Role, so that it is automatically selected when someone defines a Parent relationship. If the Reciprocal Role you want to add is not in the list, create it first, then add it to this role.
- Save and repeat for each relationship role you want to define.

3. Edit your relationships group (for example, the group Connections) to add the roles you have defined.

To set up the Group List Editor to display relationships

1. Add the Group List Editor iPart to a content record on which you want to display a list of a contact's relationships. For example, add it to an account page. The iPart displays a list of relationships for the currently selected contact. The selected contact is determined by either a contact ID passed to the page via a URL parameter (from the Directory, for example), the contact selected in the On Behalf Of control, or the currently signed in user.
2. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit relationships
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Both of the above
- Automatically create a group if one does not exist: Enable
- Group owner type: Party Choose the group types to include: Select Relationships
- Group type to auto-create: Select a relationship group, like Connections
- Choose the group types to include: Ensure that Connections is already selected.

  Note: Only the relationship group type selected to auto-create may be edited. For this reason, if Allow editing is selected, we recommend including only the one relationship group type in this instance of the iPart.

3. Save and Publish the content record.

Using the Content HTML iPart

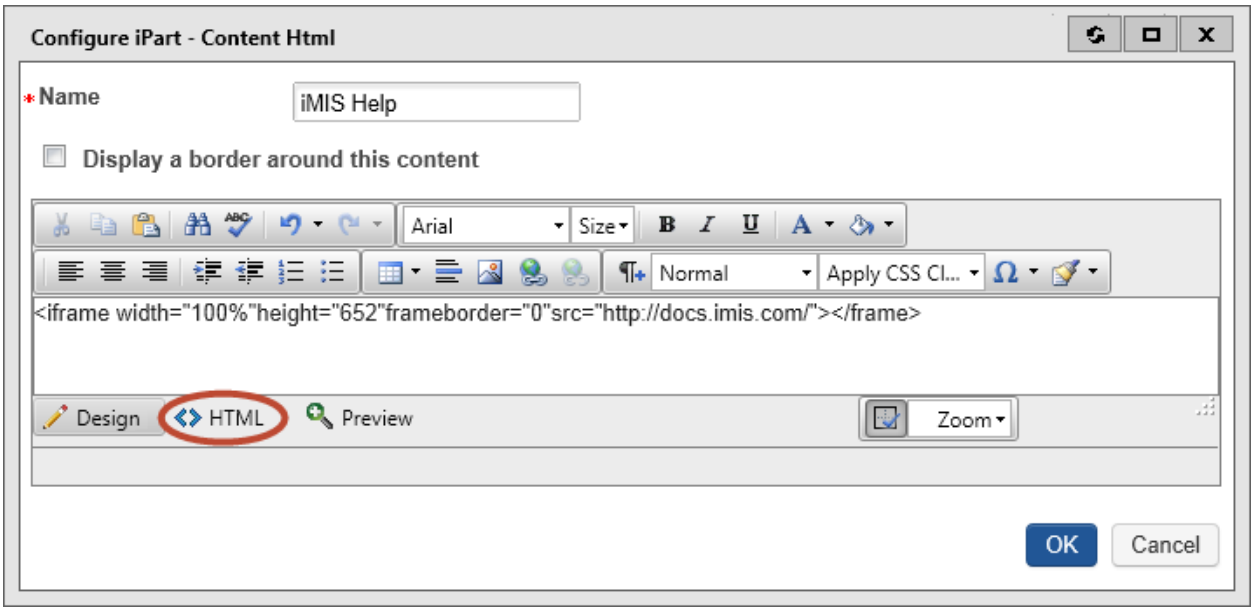
Using the Content HTML iPart, you can add simple content to your website, anywhere you want. In addition to the WYSIWYG functionality, you can switch to HTML mode to insert JavaScript to embed other sites, display web widgets, and use variables to create relative paths.

Embedding external sites

To embed any external page into an iMIS site, you can use an <iframe> like this:

1. Go to Content designer, Manage content and create a new content record.
2. Select add content and place a single Content Html iPart on it (from the ContentTypes folder).
3. Show the source by clicking the <> HTML tab and type in an iframe tag, such as this:

   <iframe width="100%" height="652" frameborder="0" src-c="http://docs.imis.com/"></iframe>
4. Go to Tools > Site designer > Manage sitemaps and create a new navigation item that points to the new content record.
5. If appropriate, restrict the navigation item's Access Settings, such as to Authenticated User Full Control.



Displaying web widgets

You can install and display JavaScript-based web widgets (plugins, gadgets) in your WCM-generated websites using the Content HTML iPart. A web widget is a small program that your users can execute within a web page and that can provide a wide range of functionality.

For example, Google Gadgets offers thousands of free web widgets including mini applications, games, news feeds, maps, and a wide range of other types of content. Many other websites also provide free widgets that can access data from their site. For example, Twitter provides widgets that let you display Twitter updates on your website. LinkedIn provides plugins that display information such as company profiles, member profiles, and links to share on LinkedIn. You just have to search the web to see what you can find that meets your needs.

Warning: Only embed widgets from authors whom you trust. Malicious code may damage your computer or violate your privacy.

To add a JavaScript-based web widget to a webpage

Go to Content Management > Content designer > Manage content:

1. Create a new content record or edit an existing one.
2. Click add content to find and select the Content Html iPart. The Configure iPart window opens.
3. Click < > HTML to switch to HTML mode.
4. Copy the JavaScript embed code for the widget you want to add and paste it into the HTML area.
5. Click OK, then Save and Publish your content record. The widget is displayed when that content record is rendered on a webpage.

Creating relative paths using variables

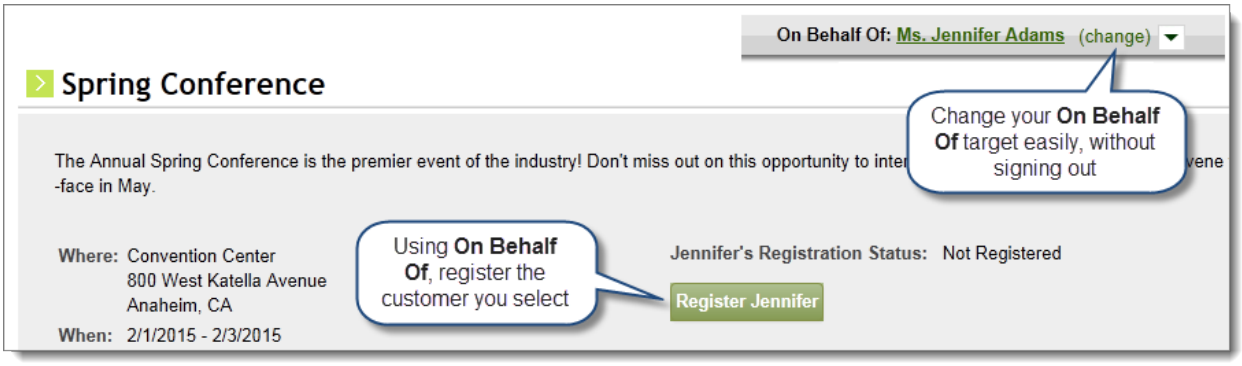
The Content HTML iPart does not support the use of the ~/ (tilde slash) shortcut, often used to automatically build the correct paths when a control is rendered in different domains. However, several variables are available in this iPart that allow you to enter paths for links and resources that are automatically resolved to various folders in your website. The variable names are case-sensitive.

Note: Images do not render in Design mode because the variable is not transformed until the content record is published.

- [Website] – Resolves to the root of the website and contains the website name. Example: [Website]Home.aspx.
- [~] and [Root] – Both variables resolve to the root of the website. Example: [~]Home.aspx resolves to http://mydomain/Home.aspx.
- [Theme] – Resolves to the website's theme folder. Example: [Theme]images/image.png. This variable can be used to access theme resources such as images and CSS.
- [iMIS] – Resolves to the iMIS directory of the website. Example: [iMIS]ContactManagement/CreateAccount.aspx
- [Common] – Resolves to the AsiCommon directory of the website. Example: [Common]Controls/Shared/FormsAuthentication/Login.aspx

On Behalf Of: Customer service mode

Your iPart-based site is not just for self-service: On Behalf Of gives your staff a customer service mode, to complete website commerce on behalf of your customers. When requests for event registrations, product orders, and even membership renewal payments come in by phone, fax, or email, On Behalf Of lets you conduct a secure session during which you can add items to a customer's cart and complete the transaction for them, all without signing out of your own session.



Separate carts, for privacy

To avoid confusion and to protect your customers' privacy as to which items they may have added to their own carts, On Behalf Of sessions create and save carts that are

completely separate from those your customers see. For added security, items yet to be purchased are saved in these carts, but not any cardholder information that may have been entered.

For example, if you added a registration to a member's cart but do not submit it, then she will not see the registration in her cart the next time she signs in; however, when you return to registering her on her behalf, you see her cart restored to the state it was in when you left it. Once you complete a purchase on her behalf, both she and you can see the order through her account page.

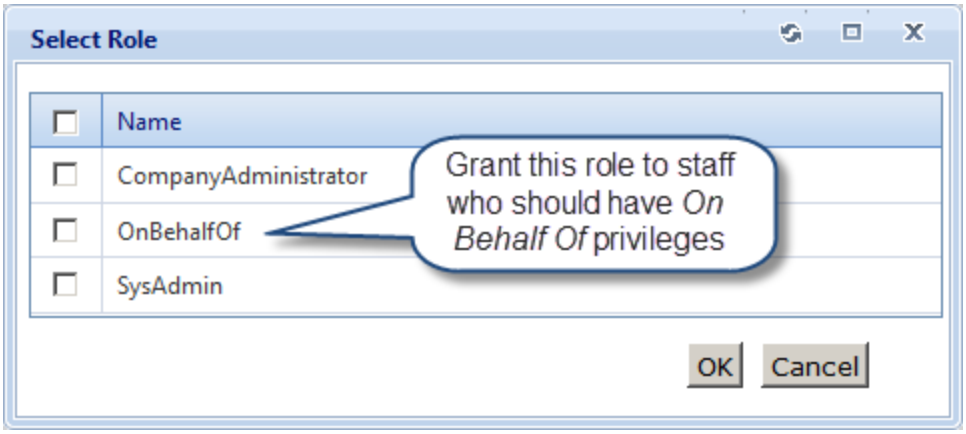
Tip: You can use the audit trails to track which logged-in user performed each action that affected an On Behalf Of transaction.

Who can act On Behalf Of?

To protect the security of contact data, users must be added to the security role SysAdmin or OnBehalfOf to perform actions on behalf of another contact (individual or organization). It is easy to give a staff member On Behalf Of privileges.

Go to System Setup > Security administration > Users:

Find and select a user, and in User Information click add role.



Changing and ending On Behalf Of

When you act on behalf of someone else, all of your commerce-related actions pertain to the target contact until you end the session in one of these ways:

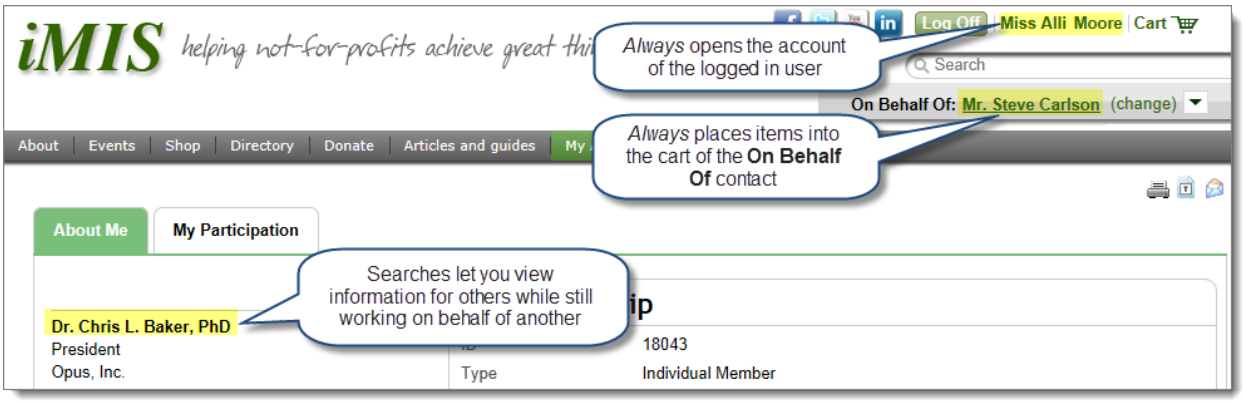
- Select a new target contact: click (change) next to the target contact.
- Clear the selected contact: click the down arrow next to the target contact and select Clear.
- Close the browser.
- Sign out of iMIS.

Whose contact information do iParts show?

Acting on behalf of another contact controls the current cart, but it does not keep you from getting to information for other contacts. An iPart determines whose cart and information to show and update based on this logic:

- If the link's URL specifies an ID (such as for search results), it shows information for that contact.
- If not, it shows information for your On Behalf Of contact, if appropriate. For example, the Query Menu iPart runs queries regardless of the target contact.
- Without On Behalf Of, it shows information for you, the logged-in user.
- If no one is signed in, it shows limited information.

For example, you could be working on behalf of one contact when you need to use the Directory to look up an address for another. You can drill down on information from those searches with no effect on your on-behalf-of contact: the iParts pass the queried contact's ID on the URL to show you the information you need. Only when you take actions that add items to the cart is On Behalf Of enforced.



Tip: What never changes is the contact name link in the top navigation: it always shows information for you (the logged-in user).

Creating websites

Creating a website is simple with iMIS! You can simply make a copy of one of the sample sites installed with iMIS and select a look and feel template and theme that is the best match for the look that you want for your new site.

Creating a site

To create a public-facing website that makes full use of iParts and SOA, it is easiest to copy an existing sample site, such as Member, and change it to meet your needs.

When you copy a website, iMIS duplicates the site navigation and content records for the new site.

Go to RiSE > Site Designer > Manage websites:

1. Select a website from the list of websites and review the following fields before you proceed:

- (Properties tab) Make sure the folder selected for the Website-specific parent content folder field contains the content unique to this website. Only the content in this site-specific folder will be copied. Any content shared with another website should be placed in a separate, shared folder.
- (Look and Feel tab) The Folder containing template content is normally a sub-folder of the parent folder. If the template content (footer area, header logo, and so forth) is stored in a different folder, select that folder instead.

2. Copy a website:

1. Select Organize > Copy.
2. Select the folder where you want to paste the new website.
3. Select Organize > Paste.
4. Enter the Name of the new website, for example, MemberCopy. Do not use special characters or punctuation.

Note: During the copy process, Content Codes are cleared from content records because this code must be unique for each content record. A warning message displays a list of the content records where the Content Code was cleared. See the log files for details.

3. Copy an out-of-the-box Master Page and Theme to be unique to your new website.

   Note: The themes change and develop with every iMIS update. To avoid losing your changes, be sure to work from a copy of the theme. Creating a copy of a theme also ensures that you do not compromise your ability to fall back to a working original. Follow these steps to copy a theme, which is far easier than creating one from scratch.

1. Select your new website.
2. (Look and Feel tab) Select the master page and theme that you want for your new site.
3. Locate the theme folder (such as \Aspen), which defaults to C:\Program Files\ASI\iMIS\Net\App_Themes.
4. Copy, paste, and rename \Aspen to your new site name (\ABC).
5. Locate the master page (such as Forest.master), which defaults to C:\Program Files\ASI\iMIS\Net\Templates\MasterPages
6. Copy, paste, and rename Forest.master to your new site name (MemberCopy.master).
4. Edit your site to use your new theme files.

- Select Site Designer > Manage Websites and highlight your site (ABC).
- Edit the site Look and Feel to point to your new theme files:
- MasterPage/Template: select ABC
- Theme: select ABC
- Select Save.

5. Click the expand icon in the Status area, and enable the Is this website active option.
6. Publish the website. Select the website and click Publish.
7. Publish the new website's content:

Go to RiSE > Content Designer > Manage content:

Note: When creating a copy of a sample website, the copied website's content will not be included in search results until the content has been published and the Default Website (for search) has been selected for the copied website's content folder.

1. Select the copied website's content folder.
2. Click Edit.
3. For the Default Website (for search) field, click select.
4. Select the website for which you want searches to always include the content records within this content folder.
5. Click Save and then close the window.
6. Publish the website's content folders. Select the content folder of the copied website.
7. Select Publish. As each folder and content record publishes, the status will change from Publish Pending to Published.
8. If the website is hosted on a separate web server, publish the Core Content folder. See Installing WCM on web servers for more information on hosting a site on a separate web server.

Go to Content Designer > Manage content:

1. Select the Core Content folder.
2. Select Publish menu and choose the Publish All Items option. As each folder and content record publishes, the status will change from PublishPending to Published.

8. After all content folders are published, log off and close the browser.

Note: If the website you copied contains URL shortcuts, be sure to review those shortcuts in your new website to determine if you need to create fresh shortcuts. For example, when you select the iMIS logo in the Member site, the page redirects to the shared Member Home content record. When you make a copy of the Member site and you select the iMIS logo from the new site, you will be redirected to the same shared Member Home

content record. To resolve this, create a fresh shortcut that will point to your new Member Home.

Deleting a website

A website administrator can delete a website and the content records associated with the website. However, you should proceed with caution, as a deleted website cannot be retrieved. Ensure the website is not a production site.

Go to RiSE > Site Designer > Manage websites:

1. Select the website you want to delete (such as MemberCopy).
2. Select Organize > Delete. A warning message is displayed.
3. Click OK. A results window is displayed.
4. Click Close.
5. Select Recycle Bin.
6. Select Organize > Empty the Recycle Bin. A warning message is displayed.
7. Click OK. A results window is displayed.
8. Click Close.

Go to RiSE > Content Designer > Manage content:

9. Select the content folder of the copied website.
10. Select Organize > Delete. A warning message is displayed.
11. Click OK. A results window is displayed.
12. Click Close.
13. Select Recycle Bin.
14. Select Organize > Empty the Recycle Bin. A warning message is displayed.
15. Click OK. A results window is displayed.
16. Click Close.

Implementing a mobile site

The Member Mobile sample site is optimal for mobile devices like smart phones and tablets, featuring accessible content and a sitemap for members needing information on the go. The master page Sapling places key information at the top of the screen and works with the Aspen Mobile and Austin Mobile themes; featured styles are sized appropriately for smaller screens.

If you want to provide a mobile site for your members, we recommend that you start with a copy of the Member Mobile sample site, and then apply your changes. When you make a copy of the site, iMIS creates a copy of the website, content, and sitemap.

Note: Before the following required steps, you must complete your copy of the mobile site.

To implement a mobile site, do the following:

Go to RiSE > Site Designer > Manage sitemaps:

1. Choose your copy of the Member Mobile site.
2. Edit the Full Site navigation item to add your main site's URL to the Content or URL to Link to.
3. Go to RiSE > Content Designer > Manage content, then select the content folder created for your copy of the mobile site.
4. From the ContentAreas folder, edit the following content records:

- Social Networking Images: Configure the Social Networking instance of the Content Html iPart, and from the <>HTML tab, update the href's to link to your social media accounts or remove any links you do not want to appear.
- Header Logo: Configure the Header Logo Span instance of the Content Html iPart and update the logo to your organization's logo.
- Footer Copyright: Configure the Footer Copyright instance of the Content Html iPart, and update the content and link for your organization.

Tips and reminders

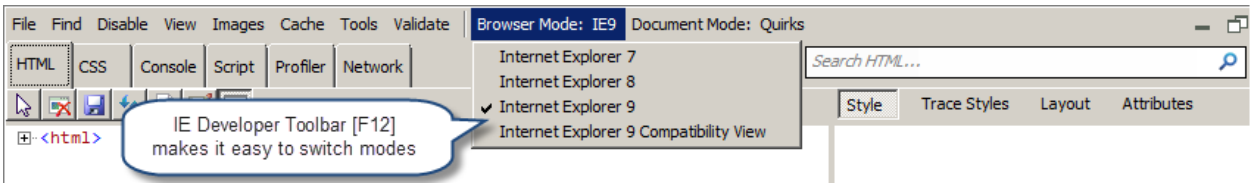
- Trim content – For easier reading on small screens, and to decrease page load time, keep content simple.
- Automatic redirect – Consider adding some JavaScript to redirect users automatically to the mobile site when they try to access your full site on mobile devices.
- Add favicon – Update the favicon used for your mobile site, apple-touch-icon, located by default in C:\Program Files\ASI\iMIS\Net.
- Easy edit limits – When you access the mobile site, Easy edit is only available when you access the website from a browser with a width larger than 700 pixels.

Modifying site themes

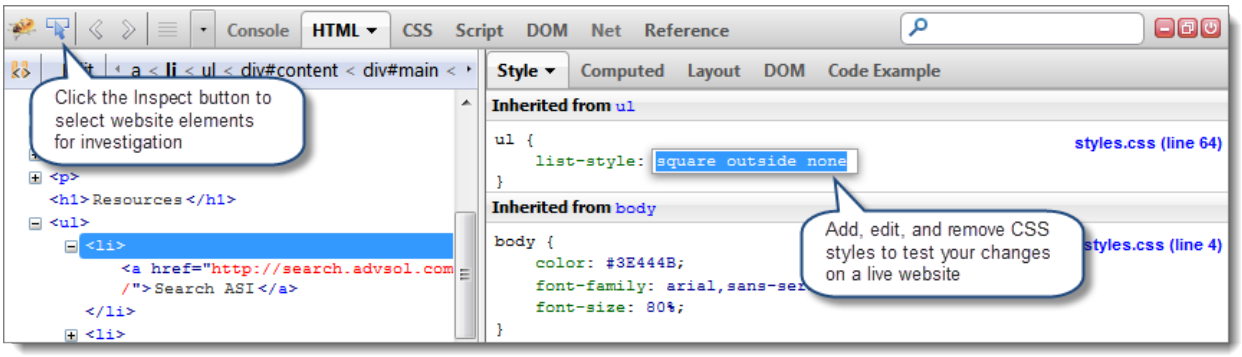
Several themes have been created for the sample sites. You can modify these themes to help identify and personalize your organization's website.

Best practices for theme development

- Caution: Never change the core style sheets 00-Reset.css and 10-UltraWave.css. All derivative themes inherit from these files, and any changes you make to them are lost on upgrade. Instead, override the base styles in your 99-[theme].css.
- Before modifying a theme, find the best one: apply all of the themes to the default Member site in turn, and decide which theme is closest to the final look and layout that you want.
- Always work from your copy of the theme, so that you can begin again.
- Make changes only to websites that you create. When a sample site is updated with each release, the iMIS Upgrader overwrites any changes you made to it.
- Take advantage of browser-based developer tools to test and troubleshoot changes before committing them to your style sheets:
- Internet Explorer and Chrome: Press F12 to toggle the Developer Toolbar.



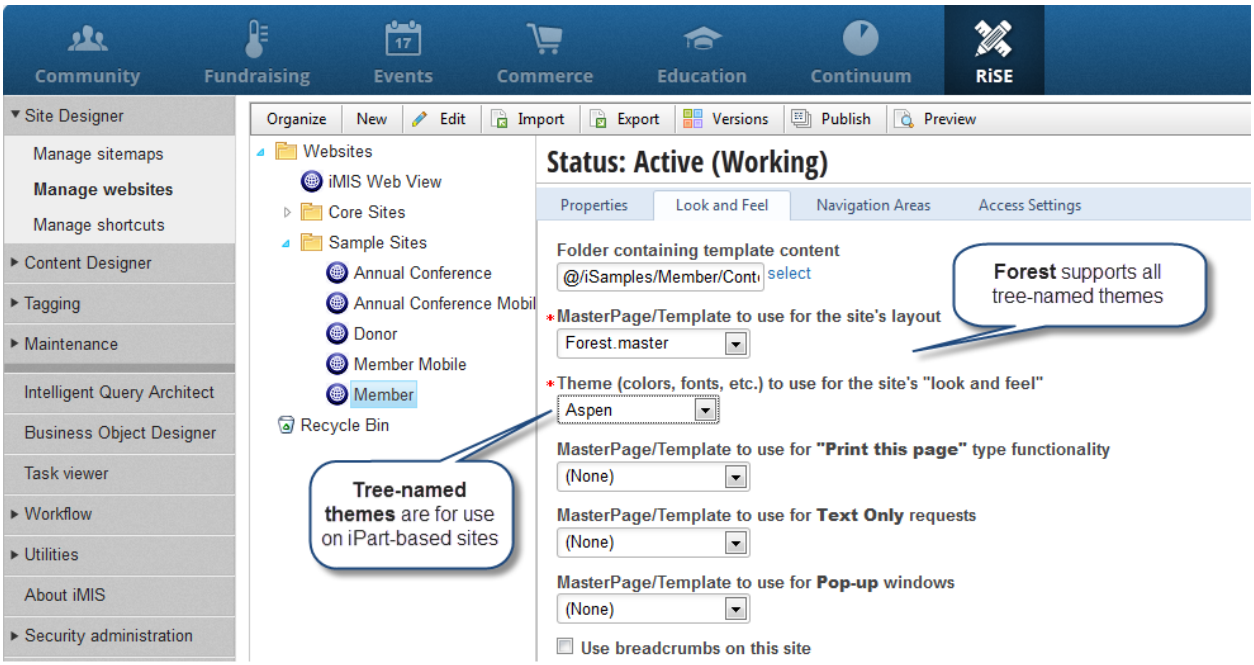
- FireFox: Install the Firebug add-on to see a wealth of information about the structure of the website and the styles it is using. Turn on the element inspector and click a piece of content to see the styling that it is implementing:



Sample themes and master pages

You can change the look and feel of the sample sites by selecting different combinations of a Master Page and its matching Theme. If you want to modify a particular design for your website, make sure you create a copy of the master page and theme before making any changes.

Note: iMIS themes give you a head start on developing your website. To provide you an idea of how things could look, we have used numerous pictures, illustrations, and images that we purchased under a limited license for ASI's use. The icons can be used on your website, but if you reuse any of the other images, you will need to buy a license. We acquire the majority of our images from iStockPhoto and most are available in the range of $15-$50; much less than the cost and labor of creating them on your own. If you have any questions, please contact us.



Example: Selecting a theme created for the Forest master page

Important: If possible, avoid customization to master pages. If you do need to make changes, make the changes in a copy of the master page. Any customizations performed to the out-of-the-box master pages will be overwritten after an upgrade.

The following designs are available out-of-the-box for iMIS sample sites.

City.master

The set of city-named themes support RiSE sites and can be used interchangeably with the City master page.

Available theme:

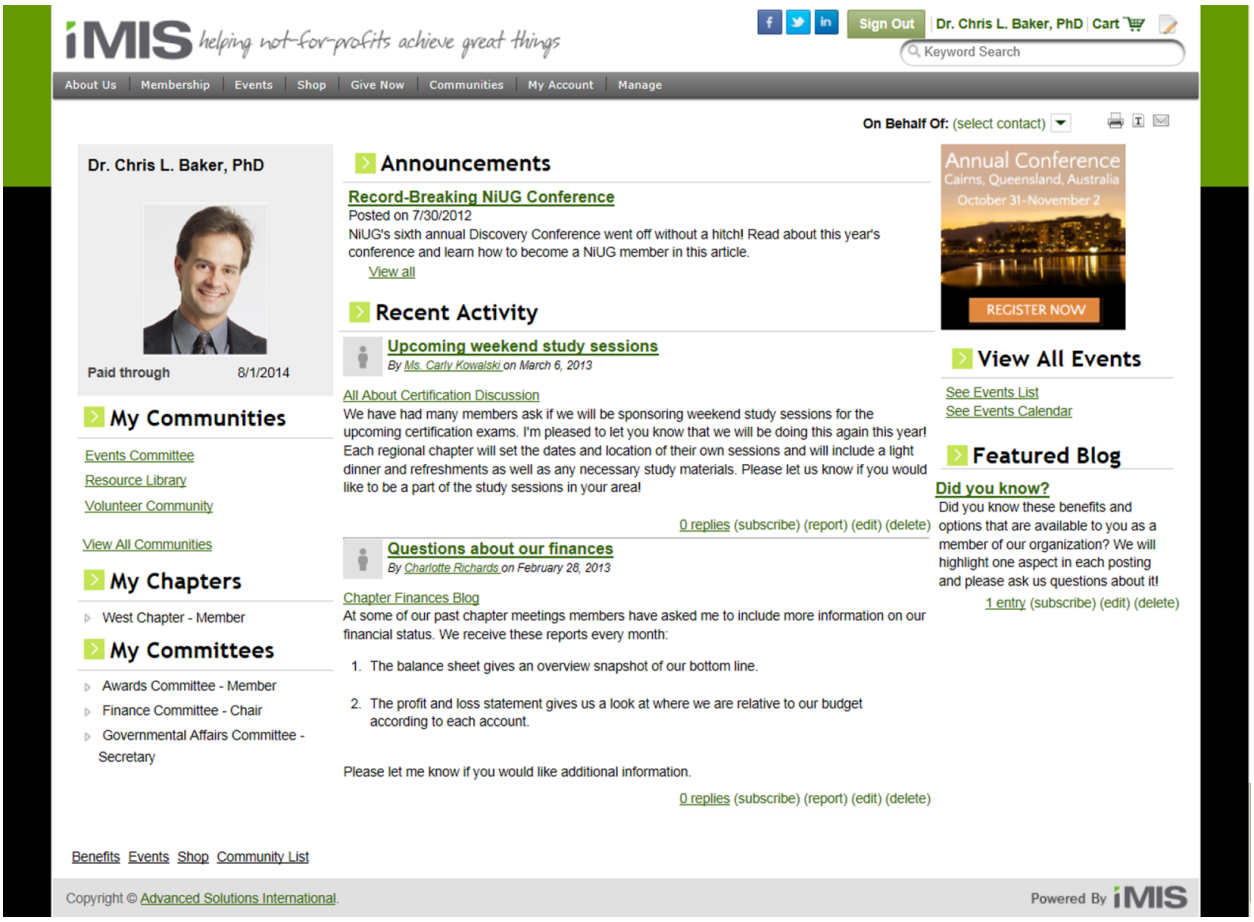
Austin

Forest.master

The set of tree-named themes support RiSE sites and can be used interchangeably with the Forest master page.

Available themes:

Aspen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Events
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Give Now
Communities
My Account
Manage
On Behalf Of: (select contact)
Dr. Chris L. Baker, PhD
Paid through 8/1/2014
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Events Committee
Resource Library
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By Charlotte Richards on February 28, 2013
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At some of our past chapter meetings members have asked me to include more information on our financial status. We receive these reports every month:
1. The balance sheet gives an overview snapshot of our bottom line.
2. The profit and loss statement gives us a look at where we are relative to our budget according to each account.
Please let me know if you would like additional information.
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Did you know these benefits and options that are available to you as a member of our organization? We will highlight one aspect in each posting and please ask us questions about it!
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My Committees
Awards Committee - Member
Finance Committee - Chair
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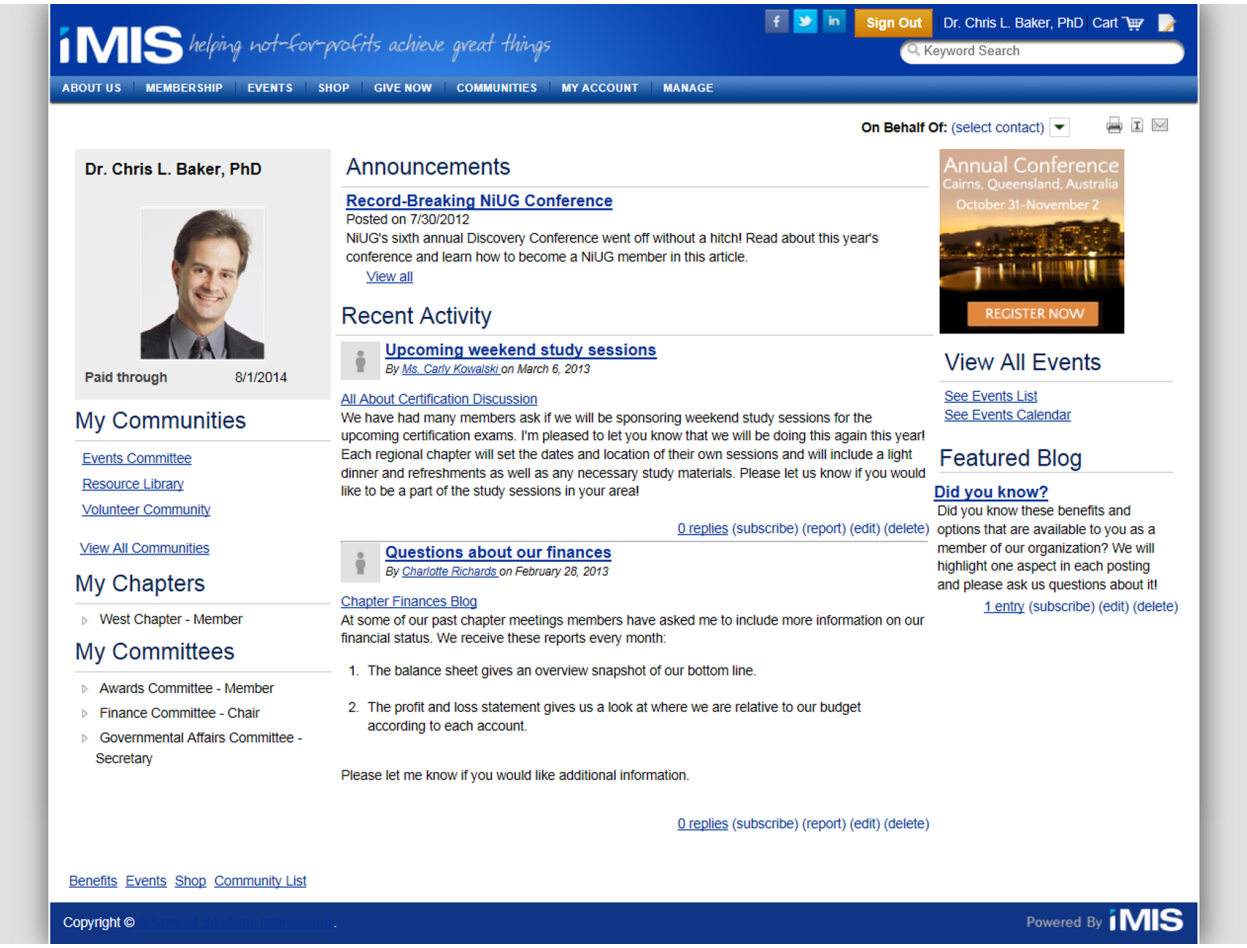
Birch

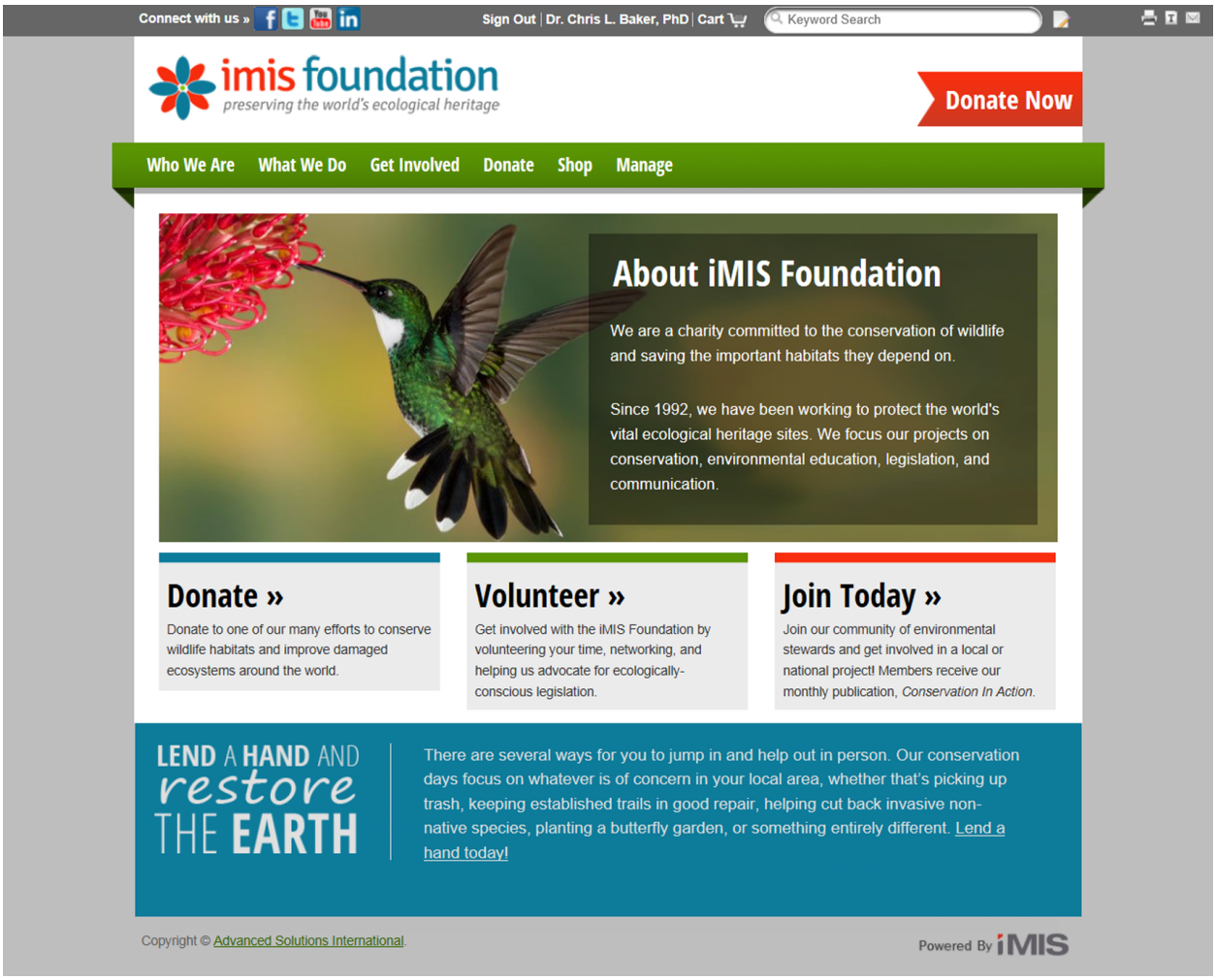


Planets.master

The set of planet-named themes support RiSE sites and can be used interchangeably with the Planets master page.

Available themes:

Mercury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Since 1992, we have been working to protect the world's vital ecological heritage sites. We focus our projects on conservation, environmental education, legislation, and communication.
Donate »
Donate to one of our many efforts to conserve wildlife habitats and improve damaged ecosystems around the world.
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Get involved with the iMIS Foundation by volunteering your time, networking, and helping us advocate for ecologically-conscious legislation.
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Join our community of environmental stewards and get involved in a local or national project! Members receive our monthly publication, Conservation In Action.
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There are several ways for you to jump in and help out in person. Our conservation days focus on whatever is of concern in your local area, whether that's picking up trash, keeping established trails in good repair, helping cut back invasive non-native species, planting a butterfly garden, or something entirely different. Lend a hand today!
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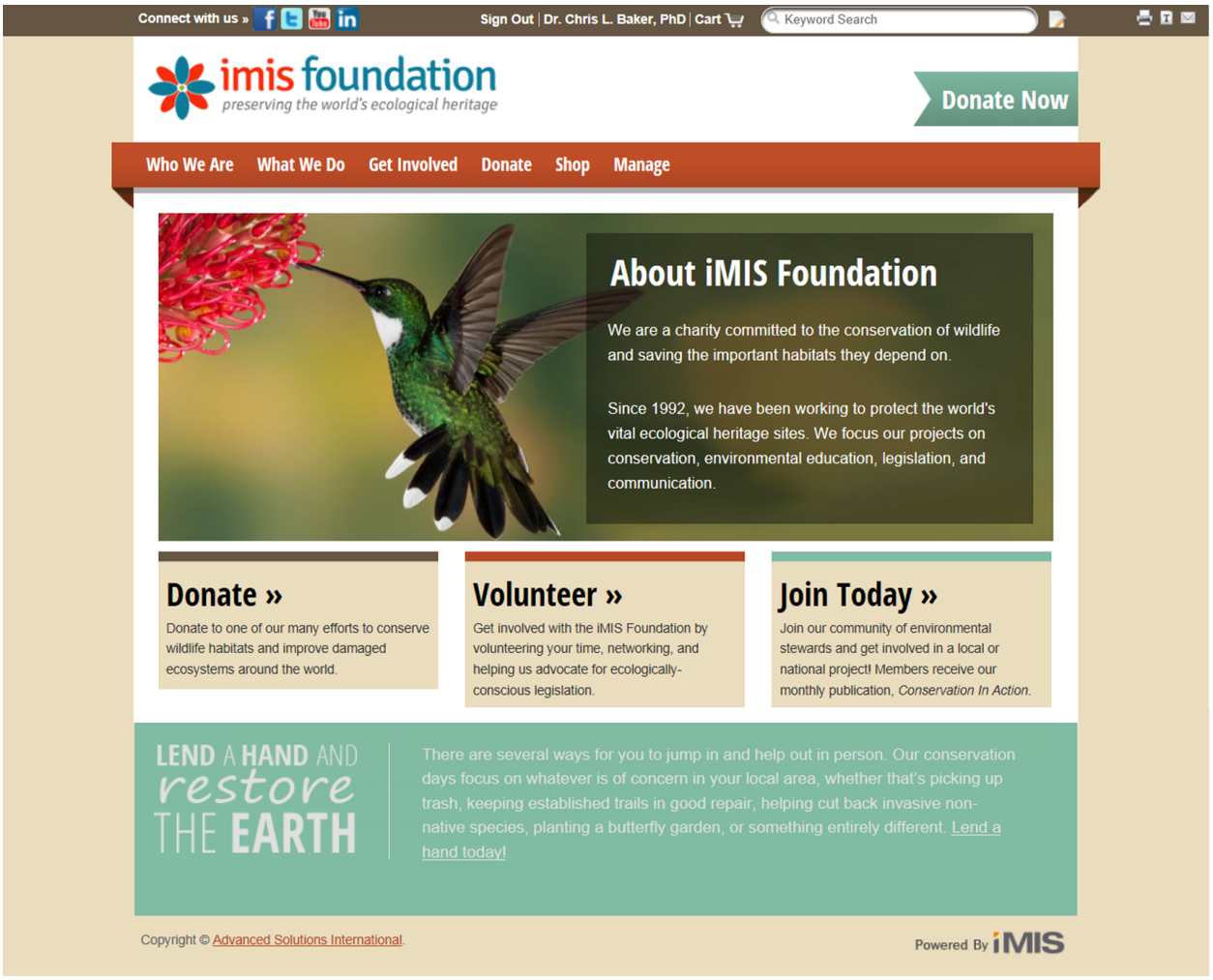
Venus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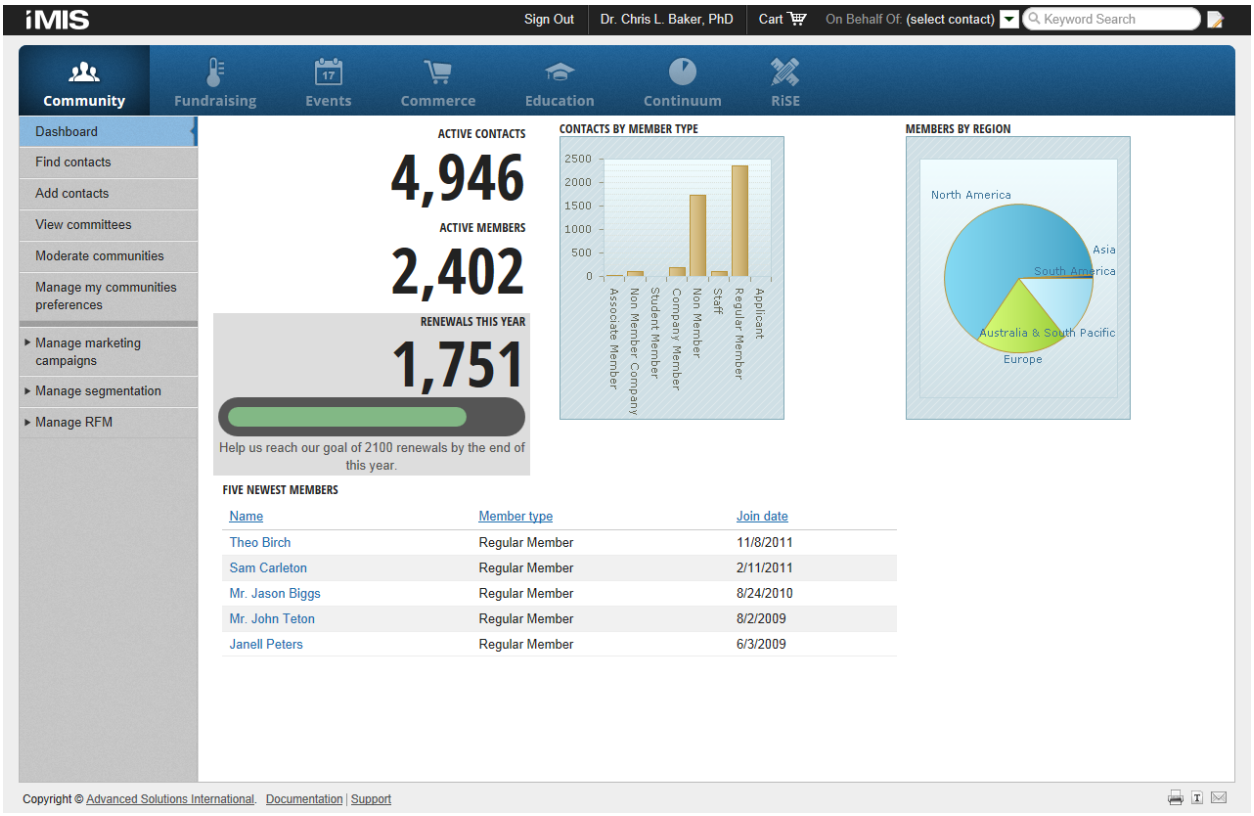
Mars

Mountains.master

The Mountains master page was created specifically for staff functionality. It should not be used with member-facing websites.

Available theme:

Everest



Sapling.master

The Sapling master page was created for mobile devices.

Available themes:

Aspen_Mobile

Upcoming Spring Conference

Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.

Austin_Mobile

AT&T
1:19 PM
iMIS
Cart
Annual Conference
The Annual Conference is fast-approaching. Don't miss out – register today!
October 30 - November 1
Cairns, Australia
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UltraWave and Universal Design

The Sample site themes and master pages build upon a new underlying template called UltraWave. UltraWave incorporates structure and styling for Universal Design. Universal Design seeks to make web content "barrier-free," making sites accessible to all challenged users. Challenged users include not only the millions of physically or cognitively impaired, but also seniors, non-native speakers, and those in other countries and cultures (localization).

Universal Design has benefits beyond helping websites meet the myriad of web accessibility standards: it also aids in breaking technology and human barriers. Universal Design is the foundation for transforming pages and content into outputs and displays your members may need, including print presentation, net book usage, and even cell phone applications.

Important: UltraWave themes support RiSE sites, which are an alternative to Public view. They do not support existing Public views.

Features of the template include:

- Developed toward W3C standards to help meet accessibility requirements
- Fluid-width template dynamically reflows content to fit your user's browser window
- Clean, minimal design uses neutral shades and layout
- Offers a streamlined set of stylesheets and skins
- Easily customized with logos, fonts, and colors
- Designed to be easily rebranded by your organization

Copying a website theme

Themes control the layout, font, and colors of your iMIS sites. The sample sites come with a set of special themes, designed for RiSE sites.

Creating a copy of a theme also ensures that you do not compromise your ability to fall back to an original that works. Follow these steps to copy a theme, which is far easier than creating one from scratch.

Note: The themes change and develop with every iMIS update. To avoid losing your changes, be sure to work from a copy of the theme, as outlined below.

1. Copy an out-of-the-box theme and master page to be unique to your new site.

- Locate the theme folder (such as \Aspen), which defaults to C:\Program Files\ASI\iMIS\Net\App_Themes.
- Copy, paste, and rename \Aspen to your new site name (\ABC).
- Locate the master page (such as Forest.master), which defaults to C:\Program Files\ASI\iMIS\Net\Templates\MasterPages.
- Copy, paste, and rename Forest.master to your new site name (ABC.master).

Go to RiSE > Site Designer > Manage websites:

2. Edit your site to use your new theme files.

- Highlight your site (ABC).
- Edit the Site Look and Feel to point to your new theme files:
- MasterPage/Template: select ABC
- Theme: select ABC
- Select Save and Publish.

3. Edit your theme files as needed to tailor the design.

Changing theme headers

The first elements to change on your website are the highly visible elements that public visitors see and use in the header: logo, social networking links, welcome banner, and the favicon.

Logo

The header logo is contained in a content record: @\[theme]\ContentAreas\Header Logo. To add your own logo, edit this content record, remove the contents in the HTML iPart, and replace with your own logo.

Note: Alternatively, you can change the logo in the CSS. The logo is set in 99-[theme].css by the selector #masterHeaderImage. Change the background image and the dimensions to match your own logo.

Social networking links

The links to the social networking sites in the top (auxiliary) navigation are also defined in a content record: @\[theme]\ContentAreas\Social Networking Images.

To change the links to navigate to your own social networking pages, edit the content record and change the links on the icons.

In the HTML editor, replace the href on each <a> tag with the appropriate URL. For example:

Favicon

The favicon is the little icon that displays next to the website in your bookmarks and on the browser tab in modern browsers. Changing it to your organizations' icon is simple: create an icon sized either 32x32 or 64x64 pixels and name it Favicon.ico. Then overwrite the original file:

C:\Program Files\ASI\iMIS\Net\Favicon.ico

Update the copyright statement

The copyright statement is contained in a content record within your copied site's ContentAreas folder: Footer Copyright. Edit the Footer Copyright instance of the Content Html iPart on that page to update the copyright.

Changing theme colors

The next step in customizing your theme is to change to colors that support your branding & style. You will make these changes in both CSS and in images.

CSS colors

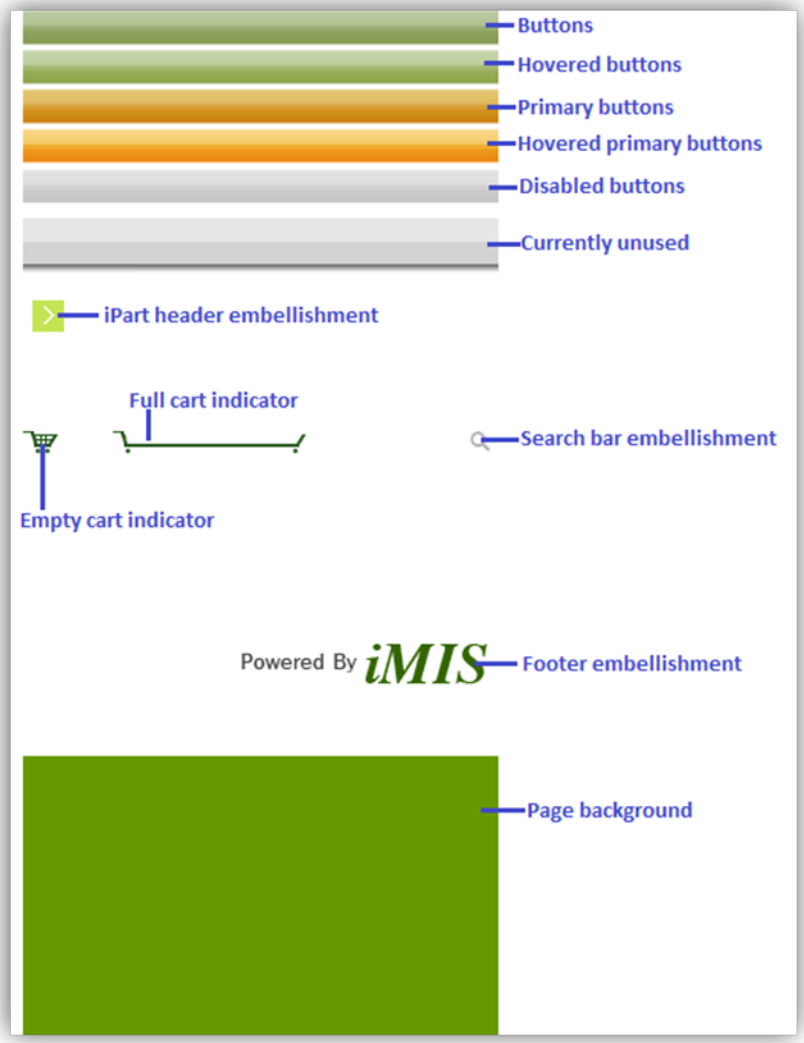
All theme-specific color and styling is located in 99-[theme].css. To find all color references that you might want to change, search the CSS file for these strings:

- color
- border
- background

We also recommend using your browser development tools to help you identify which styles you need to update for your color changes.

Sprite colors

A few of the theme's use sprites to control some of the site colors. A sprite is a single image that combines several commonly used images into one file. CSS then defines which part of the image displays for various purposes. Because your server only has to load a single image instead of several, using sprites reduces load time for your website. To improve performance, the new sample sites use sprites when possible. The image below shows a sprite used in the theme Aspen, and labels where each image is used:



You can either edit the sprite we have provided (which is easier), or create your own.

- When editing the provided sprite, keep all elements in their original pixel coordinates, so that you do not have to edit the related CSS.
- The .png version of the sprite is located in images/[theme]_sprite.png. You can edit this image in your favorite image editor, but we do not recommend editing in MS Paint, as you will lose the background transparency.
- Your theme's \Resource folder also includes a .psd source file of each sprite. You can edit the .psd with Photoshop or GIMP, a free image editor that can edit and save images in .psd and web-safe formats.

- If you edit the .psd, save your new image as a .png, and place it in the images folder of your theme.

  For greater design control, you also have the option of creating your own sprite. If you choose that option, you may also need to update your theme CSS for the new coordinates of the sprite. To help you with this process, we recommend the following resources:

- CSS Sprites: What They Are, Why They're Cool, and How To Use Them
- Sprite Cow calculates the pixel positions of the various images inside your sprite.
- CSS Sprite Generator lets you upload a zip file of images and get back a sprite file with the corresponding CSS.

Changing theme home pages

The Member site uses a pair of home pages: one that appears to guests (unauthenticated view) and another that appears to those who have signed in (authenticated view). You can change one or both of them, or drop one entirely and have one home page appear to all.

Do the following to change the unauthenticated home page:

Go to RiSE > Content Designer > Manage content:

Note: To have your own home page behave like the default one (switch to the authenticated home page when the user signs in), you need to add the code-bearing HTML iPart that does so.

1. Create a new content record for your unauthenticated home page.
2. Copy the AuthScript code to your new home page:

- Edit the unauthenticated home page content record @\iSamples\Member\Home.
- Locate the HTML iPart named AuthScript.
- Select Move To and select your unauthenticated home page.

- Now edit your unauthenticated home page and move the AuthScript iPart to the top of the content record.
- Save and Publish your home page.

3. Make your site's home page link to your new home page.

- Go to Site Designer > Manage sitemaps.
- Select your website.
- Edit the default navigation item (flagged with ★) and select your new home page for Content or URL to Link to.
- Save and Publish your sitemap.

Do the following to change the authenticated page:

Go to RiSE > Content Designer > Manage content:

Note: To have your own authenticated home page appear as soon as the user signs in, you need to edit the code-bearing HTML iPart that calls it.

1. Edit your unauthenticated home page content record.
2. Locate the HTML iPart named AuthScript.
3. Select Configure and switch the editor's view from Design to HTML, to view the code.
4. Edit the path to be the published path of your new authenticated home page:

path = "~/Mbr/Home/[theme]/MemberHome.aspx";

Do the following to use only one home page.

You can drop to a single home page either by:

- Removing the script that opens the authenticated home page:
- Go to Content Designer > Manage content and Edit the unauthenticated home page @\[site]\Home and delete the HTML iPart named AuthScript.
- Substituting your own page entirely:

- Go to Site Designer > Manage sitemaps and set your desired content record to be the default home page of your website.

Changing Telerik skins

Several iParts throughout the product use Rad Controls developed by Telerik. These controls require a few steps to style, and Telerik resources can help you get started:

- Telerik Control Guide – an overview of Telerik controls, including available skins.
- Telerik Visual Style Builder – generates CSS and some images for skinning Telerik controls.

Every [theme].skin file lists all of the Telerik skins that it uses to style controls. If a control does not explicitly define a theme, then it uses the Default Telerik skin.

Rad Window control

This control is the pop-up window that we see in many iParts. Its skin is set by two lines in Aspen.skin:

<asiweb:Window runat="server" Skin="Forest" />

<asiweb:WindowManager runat="server" Skin="Forest" />

Forest is a skin designed by Telerik and is available on most Telerik controls, along with a handful of other Skins. You can preview available Telerik skins for this control.

Tip: Telerik skins are easy to switch out and virtually maintenance-free. However, they are difficult to customize, so avoid this route unless you can use the skins as-is.

Rad Tab Strip

This control is used by the Content Collection Organizer (CCO) iPart, the Contact Address Editor iPart, and most other places where you see a tab strip. This line defines the skin:

<telerik:RadTabStrip runat="server" Skin="Aspen" EnableEmbeddedSkins="false" />

The definition for this look and feel is near the bottom of the 99-[theme].css, under the heading RadTools Styles.

Rad Menu control

This control displays the primary navigation area. There is wrapper for this control called PageNavR, so this line defines the skin:

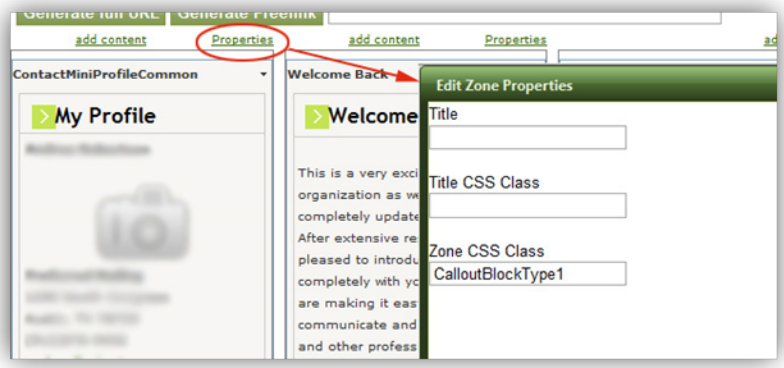
<asi:PageNavR runat="server" Skin="Aspen" EnableEmbeddedSkins="false" … />

The styling for the Rad Menu is located in Menu.[theme].css, and the image sprite is under [theme]\Menu\rmSprite.png. The easiest way to customize this control is to use Telerik's Visual Style Builder. (Tip: This tool works best in Internet Explorer.)

Changing zone properties

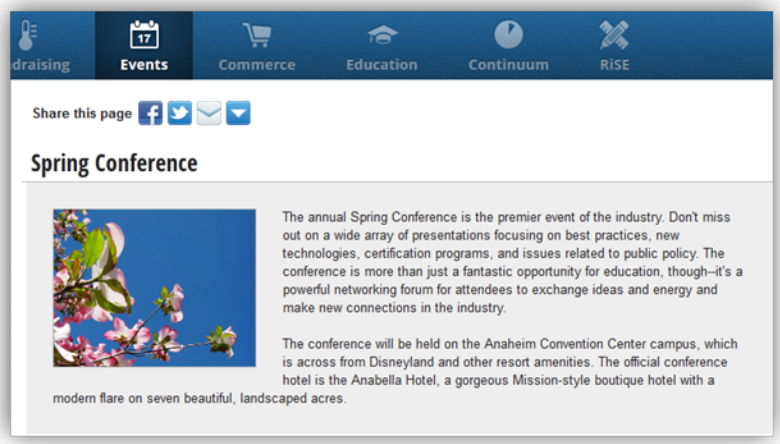
Zone properties make it easy to apply unique styling to specific iParts, for emphasis and contrast.

To apply a style to an iPart's zone property, edit the content record, click Properties, and enter the name of the class in Zone CSS Class:

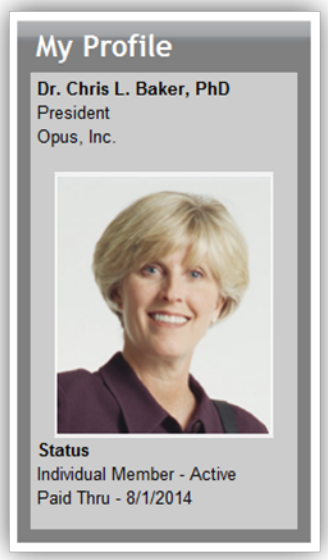


You can add more if needed, but all tree-name themes contain the following three zone style classes:

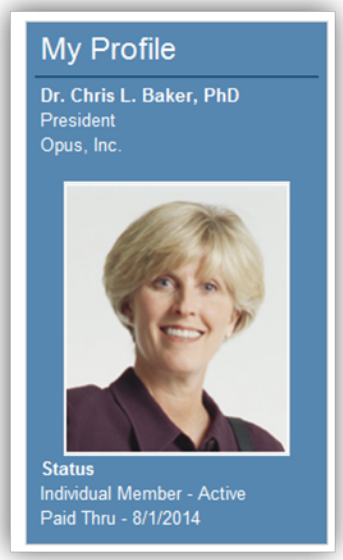
- TitleBarNoBorder – simply removes the bottom border from iPart headers
- CCOGrayBg – applies a gray background to content appearing in CCO tabs



- CalloutBlockType1 – accentuates an iPart whose border is enabled



Aspen:



Birch:

Creating a new theme

Instead of editing a copy of Aspen or Birch, you can also start from scratch when designing your own theme. However, you must include the 00-Reset.css and10-UltraWave.css in your new theme. To do so, begin your new style sheet with these lines:

```
/*##########################################*/
/*     Import UltraWave StyleSheets      */
/*##########################################*/
```

@import url("../UltraWave/00-Reset.css");

@import url("../UltraWave/10-UltraWave.css");

Resources for CSS

- w3schools.com – a great resource for CSS and HTML information and examples.
- CSS3 Generator – a tool to help generate CSS for rounded corners, box shadows, background gradients, and opacity. (Note: CSS3 is not fully supported in all browsers.)

Designing site navigation

Displaying left navigation

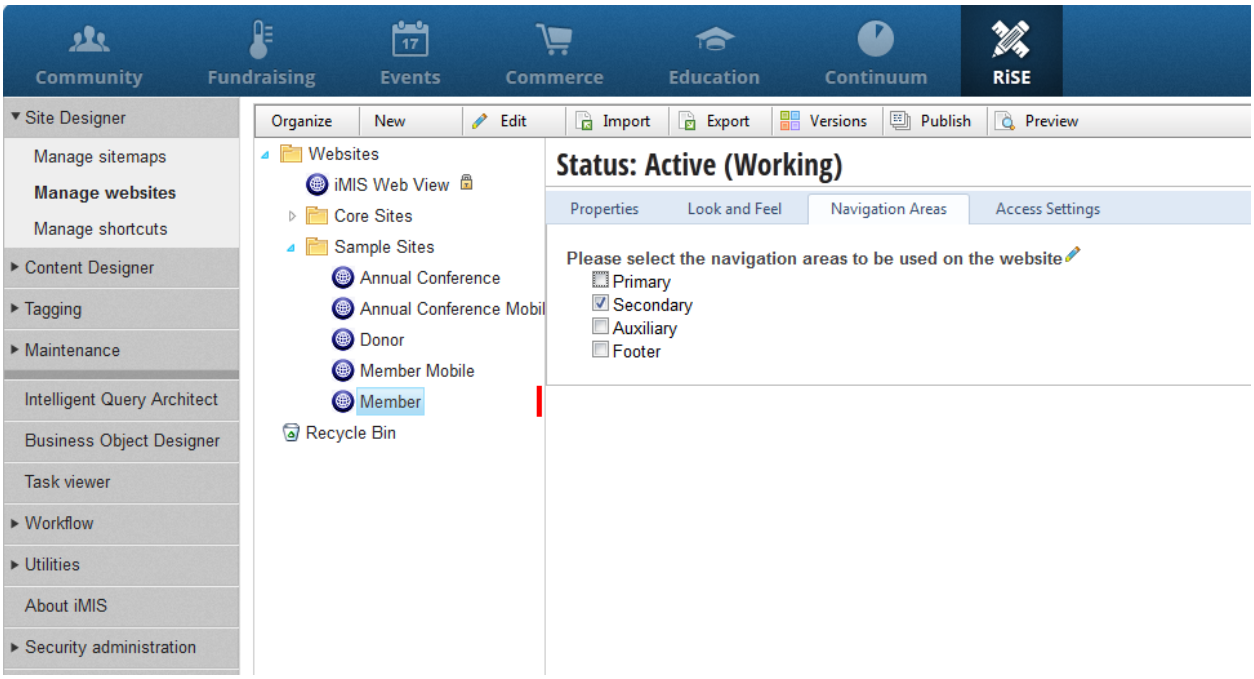
You can display website left navigation in a hierarchical format with a few changes to your theme's master page and skin file.

Do the following to implement left navigation:

Go to RiSE > Site Designer > Manage websites:

1. Define how many levels of navigation to display.

- Select the website.
- Select the Navigation Areas tab and select the Secondary navigation area.
- Save and publish your changes.



2. Edit the website theme's master page.

- Using your preferred text editor, find and open the website theme's master page. Master pages, by default, are located in C:\Program Files\ASI\iMIS\Net\Templates\MasterPages.
- Register the control by adding the following line to the top of the master page, just below the other registered controls:

  <%@ Register TagPrefix="asi" TagName="SubNavigation" Src-c="~/AsiCommon/Controls/Navigation/SubNavigation.ascx" %>
- Add the following scripts to the <script language="C#" runat="server"> section:

  protected override SiteMapNode GetStartingNode()

  {

  return Secondary.GetStartingNode();

  }

  protected override SiteMapNode GetCurrentNode()

  {

```
    return Secondary.GetCurrentNode();
}
```

- Find the masterSideBarPanel div. It should look like this:

```
<div id="masterSideBarPanel" class="yui-b">
    <asp:ContentPlaceHolder ID="SideBarPlaceHolder" runat="server">
      </asp:ContentPlaceHolder>
</div>
```

- Update the masterSideBarPanel div so that it contains the following:

```
<div id="masterSideBarPanel" class="yui-b">


     <asp:Panel ID="SubNavPanel" runat="server" >
         <asp:ContentPlaceHolder ID="PageSubNavigationPlaceHolder" runat="server">
         <asp:Panel id="SubNavHead" runat="server" class="SubNavigationHead">
         <asp:Literal ID="SubNavPanelTitle" runat="server" />
         </asp:Panel>
         <asp:Panel id="SubNavBody" runat="server" class="SubNavigationBody">
         <asi:SubNavigation id="Secondary" runat="server" NavigationPaneCode="2"
           StartingNodeOffset="1" StartFromCurrentNode="true"
           StartingNodeOffsetAutoSet="true" SelectDefaultNode="false" />
          </asp:Panel>
          </asp:ContentPlaceHolder>
        <asp:ContentPlaceHolder ID="SideBarPlaceHolder" runat="server" />
    </asp:Panel>
```

```
</div>
```

- Find the masterWrapper div, and add the yui-t2 class to it:

```
<div id="masterWrapper" class="yui-t2">
```

- To improve JavaScript performance for websites using hierarchical sub-navigation, find the following script:

```
<script type="text/javascript">
    // if there is something in the side bar this converts the layout to 2 columns
    if ($('masterSideBarPanel').children.length != 0) {
      $('masterWrapper').setAttribute("class", "yui-t2 HasSubNav");
    }
</script>
```

- Update that script to the following:

```
<script type="text/javascript">
    // if there is something in the side bar this converts the layout to 2 columns
    if ($('masterSideBarPanel').children.length === 0) {
      $('masterWrapper').removeAttribute("class");
    }
</script>
```

3. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.

- Register the control by adding the following line to the top of the skin file, just below the other registered controls:

  <%@ Register TagPrefix="asi" TagName="SubNavigation" Src-c="~/AsiCommon/Controls/Navigation/SubNavigation.ascx" %>

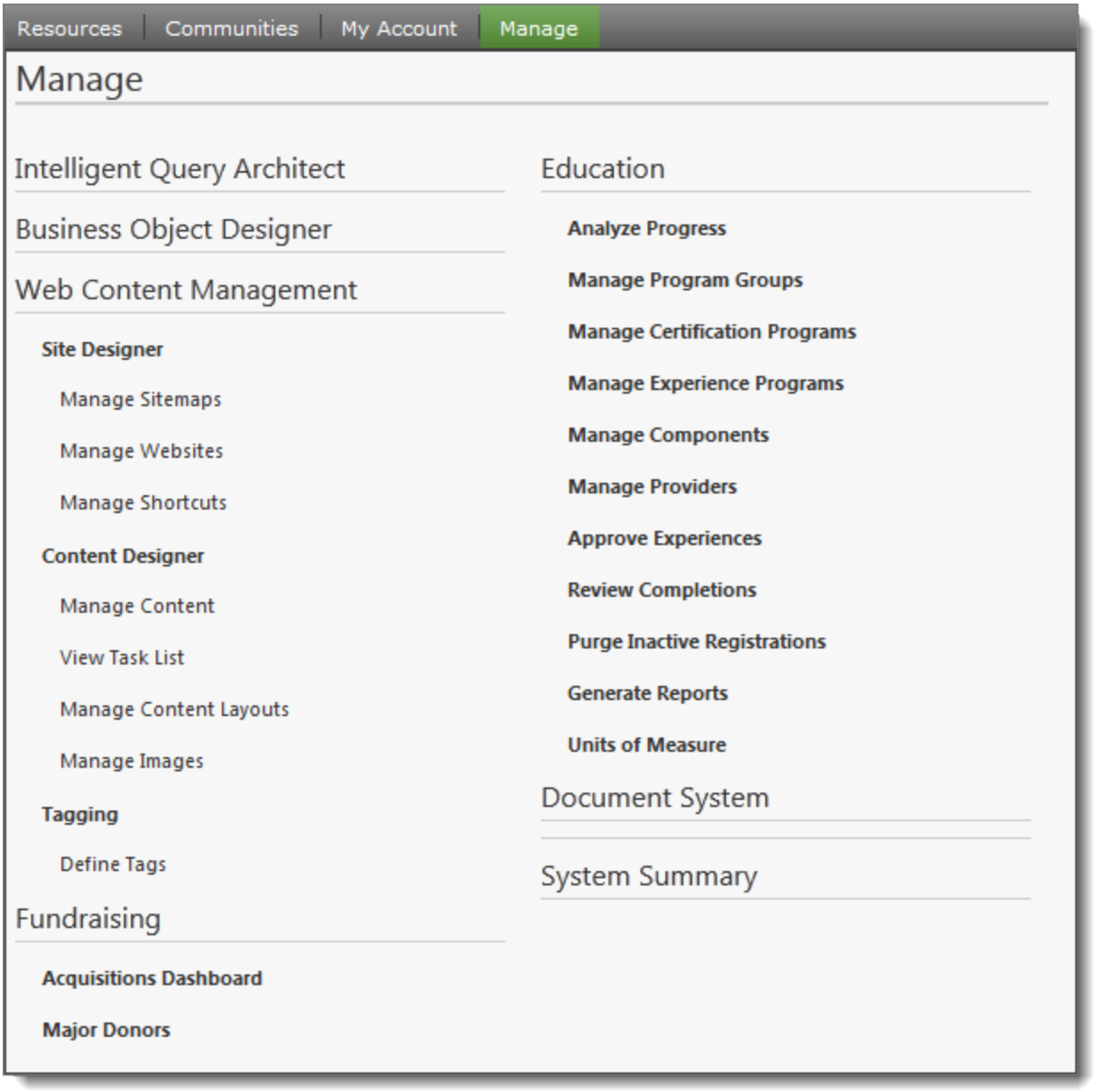
- Just below the section registering controls, add the following line:

  <asi:SubNavigation runat="server" Skin="Aspen" EnableEmbeddedSkins="false" SingleExpandPath="true" ShowLineImages="false" />

- (optional) If you are familiar with skin controls, you can configure how the SubNavigation control behaves using the following properties:
- string NavTreeSkinId – A unique ID for the skin if needed. The default is RadTreeView.
- bool SingleExpandPath – Gets or sets a value indicating if only the current branch of the tree is expanded. The SingleExpandPath property, when set to True, automatically collapses nodes that are not on the path of the currently expanded node. Use the SingleExpandPath property when you need to conserve screen space and make navigating nodes easier.
- public bool ShowLineImages – Gets or sets a value indicating if the tree node line images display or not.
- string Width – Gets or sets width of the control. Specify in pixels (px) or percentage (%) e.g. 500px, 90%.
- bool EnableEmbeddedSkins – Gets or sets a value indicating if the built in skins should be used on the navigation tree.
- int MaxDataBindDepth – Gets or sets the maximum number of levels to bind to the navigation tree.
- bool WrapNodeText – Gets or sets the option to wrap text if it is wider than the trees allowed width.
- bool ExpandAllNodes – Gets or sets the option to expand all of the nodes when the navigation tree renders.

Displaying mega drop-downs

You can display mega drop-downs from your primary navigation with a few changes to your theme's skin file and menu CSS. Mega drop-downs display navigation items within large panels, grouped by level, which reduces scrolling and improves the usability of site navigation.



To implement mega drop-downs

1. Ensure that all navigation items in the sitemap have a value for Content or URL to Link to. Otherwise, the navigation hierarchy may not render properly.
2. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the pageNavR control and update it to add the following property:

  EnableMegaDropDownMenu="true"

- (optional) If you are familiar with skin controls, you can configure how the mega drop-down behaves by altering the following properties:
- EnableMegaDropDownMenu – Enables the mega drop down.
- MegaDropDownMenuShowStartingNode – Displays the parent navigation node as the first item in the mega drop down. Enter true or false.
- MegaDropDownMenuLevelSettingLevel – Defines the navigation level at which the number of columns set for MegaDropDownMenuRepeatColumns starts to take effect. For example, if you set MegaDropDownMenuRepeatColumns="3" and set MegaDropDownMenuLevelSettingLevel="2", then the mega dropdown displays three columns for the second and higher navigation levels, and the first level only has one column.
- MegaDropDownMenuRepeatColumns – Defines the number of columns used to display the navigation.
- MegaDropDownTooltipLocation – This option only applies to tooltips defined for top level navigation items in the primary navigation. When defined, it specifies the location of the tooltip text if a tooltip is defined for that navigation item. Enter either Menu (displays the tooltip directly beneath the top level navigation item) or Append (displays to the right of the navigation text within the dropdown). If you do not define this property, navigation tooltips are not displayed in the dropdown.

3. Edit the theme's menu CSS to tailor the display of the mega drop-down for the theme's look and feel.

- Using your preferred text editor, find and open the website theme's menu CSS file (for example Menu.Aspen.css). Menu CSS files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the MegaDropDownMenu Styling section and edit the styles as needed:

```
/* ############################ */
/*  MegaDropDownMenu Styling  */
/* ############################ */

.RadMenu .rmGroup .MegaDropDownMenuOuter .rmText {
   padding: 0;
   margin: 0;
   width: 600px !important;
}

div.MegaDropDownMenu
{
   background-color: #f8f7f7;
   padding-left: 5px !important;
   padding-right: 5px !important;
}

.MegaDropDownMenuToolTip
```

```
{
   padding: 5px;
}
```

Using image sprites for navigation items

A sprite is a collection of images combined into a single image. Using CSS, you can shift the image around to display only parts of it. The advantage of using sprites is that they reduce the number of server requests to load images (only one is loaded), leading to improved performance.

One way to use sprites in iMIS is for rollover effects on navigation items.

To implement image sprites for navigation items

1. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the pageNavR control and update it to add the following property:

  EnableImageSprites="true"

  When enabled, a new class named rmLeftImage is added to root level links in PageNavR.

2. Create the sprite file.

- Using an image editor like Adobe Photoshop, or a free alternative like GIMP, create your sprite by adding the images you want to a single image, like the following:

- Save the sprite to the website theme's image folder.

3. Edit the theme's 99-[theme].css file to define the classes to control the sprite.

- Use a tool like SpriteCow to determine the position values of the images in the sprite.
- Using your preferred text editor, find and open the website theme's 99-[theme].css file, located by default in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Add styles for the sprite. For example:

```
.RadMenu a.rmRootLink.CartLink .rmLeftImage
{
   Background-image: url(images/cartsprite.png);
   Background-repeat: no-repeat;
   Background-position: -1px -1px;
   Width: 48px;
   Height: 36px;
}
.RadMenu a.rmRootLink.CartLink:hover .rmLeftImage, .RadMenu a.rmRootLink.CartLink.rmExapnded .rmLeftImage, .RadMenu a.rmRootLink.CartLink.rmFocused .rmLeftImage
{
   Background-position: -1px -39px;
}
```

The first group of selectors sets the resting position for the image sprite. The second group of selectors defines the hover state and shifts the image when the link is rolled over.

Go to RiSE > Site Designer > Mange websites:

4. Apply the sprite class to the appropriate navigation items.

- Edit the navigation item for which you want to apply the sprite hover effect (for example, the Shop).
- For the CSS Class property, enter the sprite class (for example, CartLink).
- Save and Publish the navigation items.

Styling your website's primary navigation

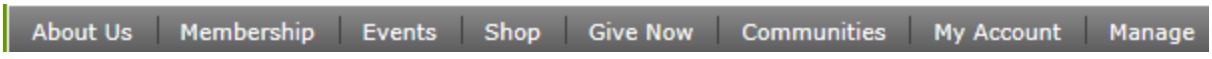
If you customize your website with a new look and feel, you will want to restyle the primary navigation to match the rest of the site. To customize the look of the navigation, you must be using iMIS 15.2 or later along with an UltraWave-derivative theme such as Aspen, Austin, or Birch. In iMIS, the primary navigation bar is built with Telerik RadControls; providing powerful tools for creating dynamic menu systems.

You can change your navigation menu's style by:

- Choosing an out-of-the-box skin provided by Telerik
- Customizing the font or color of an existing Telerik skin using Telerik's Visual Style Builder
- Styling your menu with CSS instead of using the Telerik tools

What is PageNavR?

PageNavR is a control that iMIS uses to display a website's primary navigation. The navigation bar automatically populates with each top-level navigation item, and each sub-item displays in a drop-down list that can expand to multiple levels. PageNavR wraps around a Telerik RadMenu control, so all PageNavR styles are controlled by Telerik's base styles.



What is a .skin file?

Skin files allow you to override default control behaviors in a theme-dependent way. If you set a property for a control in one theme's skin file, it will not affect how the control displays in other theme's skin files.

Take a look at this section of the Aspen.skin file in App_Themes/Aspen:

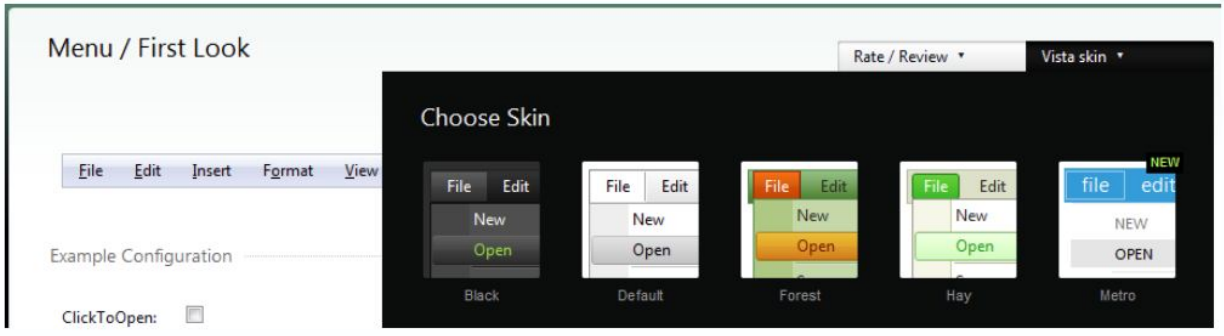
<asi:PageNavR runat="server" Skin="Aspen" EnableEmbeddedSkins="false" EnableRootItemScroll="false" Flow="Horizontal" DefaultGroupSettings_Flow-w="Vertical" DefaultGroupSettings_OffsetX="0" Width="100%"/>

These are just a few of the PageNavR properties available for the control in the skin file. The two properties which affect the navigation bar's style are "Skin" and "EnableEmbeddedSkins."

The "EnableEmbeddedSkins" property determines whether Telerik embedded skins should be loaded as the default. If you are creating your own custom skin, you MUST set this property to "false."

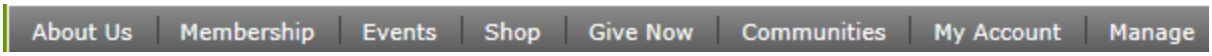
To style the navigation using a skin provided by Telerik

1. Choose an existing Telerik skin to style the navigation menu at [Telerik RadMenu Demo: First Look](#).



2. Change the "Skin" property of the PageNavR control in the theme's skin file to the name of the skin you selected.

3. Change the “ EnableEmbeddedSkins=" property of the PageNavR control to “true." The navigation bar’s styling will change to that of the Telerik skin you selected.

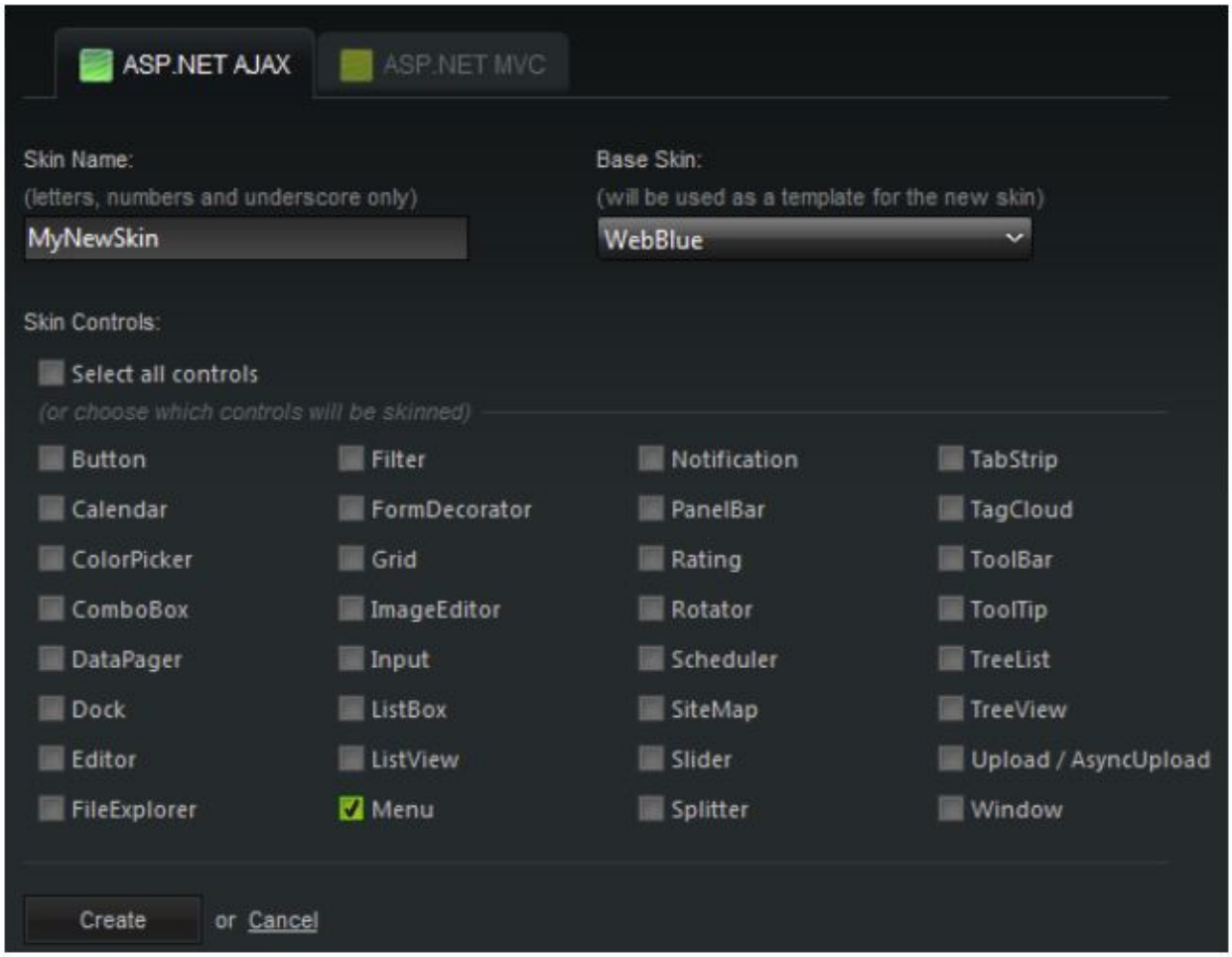


For more information, see MSDN's guide to ASP.NET Themes and Skins.

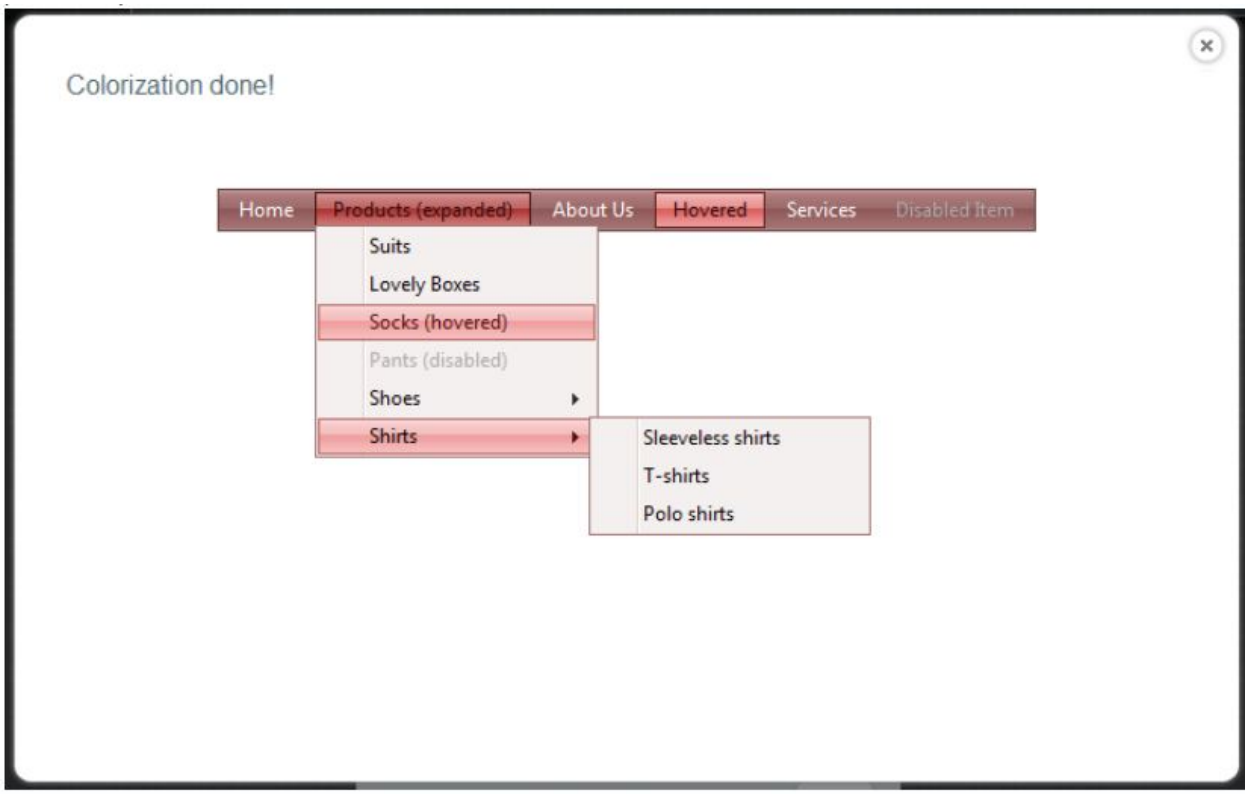
To style the navigation by customizing an existing Telerik skin using Visual Style Builder

If you want to customize the colors or font for a particular Telerik skin, you can use Telerik's Visual Style Builder:

1. Open the Telerik Visual Style Builder and select New Skin. (Note: The Visual Style Builder is in beta. For best results, use Internet Explorer as it is not fully functional in any other browser.)
2. Name your new skin, select your base skin, and check the Menu checkbox.
3. Click Create. Visual Style Builder will open on the Colorize tab.



4. Select your preferred color for the menu. You can fine-tune the hue and saturation of the color on the Shift colors tab in the color window that is open.
5. Click Save to see a preview of your new skin. If you are satisfied with the outcome, you can now download the generated images and CSS and skip to step 9.

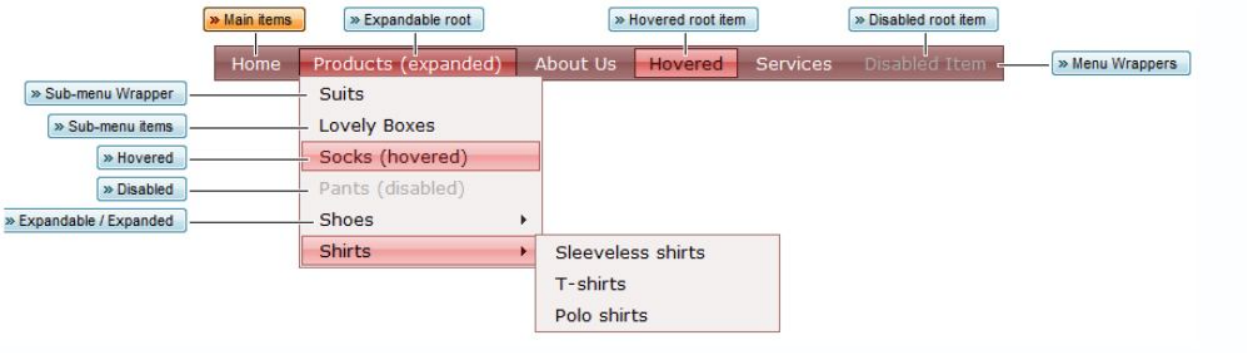


6. For additional customizing, click the Fine-tune tab of the Style Builder itself in the top left.

   Tip: The fine-tune functionality can be unpredictable. Save frequently so that if you don't like the way a change turns out, you can click "load last save" to undo it.

7. Begin with any universal changes you would like to make, such as changing the font on the navigation nodes. Click the Main items bubble to make changes to the font on the main navigation node.

   Each time you make a change the example dynamically responds. Each of the blue bubbles opens a different set of configuration options.



8. When you are finished, click Save and then Download to get the necessary code and images.
9. Copy the unzipped files to your theme's folder. Open the .skin file and set “EnableEmbed-dedSkins” to “false” and “Skin” to the name of your new skin.

   For more information and a video tutorial, see Telerik's Visual Style Builder Overview.

   To style the navigation using CSS

   If you do not like the Telerik provided skins, you can create, with the aid of your browser’s developer tool, your own image-free styling using CSS. If you choose to work by hand, you may find it helpful to start with a working skin, and adjusting to suit your needs.

1. Rename all of the base-level selectors in your working skin file to RadMenu_[Your theme name] .
2. Use your browser’s developer tools to help you figure out how to modify the CSS to get the desired result.
3. In your theme's skin file set “EnableEmbeddedSkins” to "false" and “Skin” to the name of your skin.

   Helpful Links

   Here are some links that may be helpful to you while theming your website:

- w3schools.com: CSS Tutorial
- Creating a unique homepage with CSS and Javascript – includes a very helpful video if you're unfamiliar with browser developer tools
- ASP.NET Themes and Skins
- Telerik RadControl Demos - RadMenu
- Telerik Visual Style Builder
- Telerik Visual Style Builder Overview

Controlling sitemap behavior

This section explains sitemap behavior, including:

content records, iParts, and shortcuts used for searching.

- How to modify the [OverrideLinkText] and [CartItemCount] dynamic navigation items
- Profile pages linked from the Member site's Directory, which uses an ASPX web page to redirect users to a navigation item based on a set of criteria

How search works with navigation

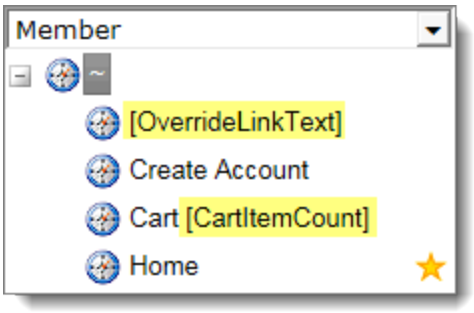
Three elements make search work in the sample sites:

- The search content records: The sample sites use search content records that are dynamically populated with an initial search result set based on a URL parameter value. These content records contain the Common Search iPart and are located within @/iCore folders.
- The pages that display the initial search results: The Shop and Events navigation items are linked to the Search content records. These navigation items have a unique value for the InitialArea URL parameter, which defines the result set generated when the pages are first displayed (i.e. products or events).
- The page displayed when a user clicks a result: The page displayed when a user clicks a search result link are based on the shortcuts defined from Site Designer > Manage shortcuts. The following shortcuts display search result links in the sample sites:

- ItemDetail –The ItemDetail shortcut displays the Item_Detail content record, which uses the Product Display iPart to display the item selected.
- GiftDetail – The GiftDetail shortcut displays the Gift_Detail content record, which uses the Donation Creator iPart to display donation pages selected from search results.
- EventDetail – The EventDetail shortcut displays the Event_Display content record, which uses the Event Display and Event Program Display iParts to display event pages selected from search results.

Modifying dynamic nav items

The default sitemaps include variables that dynamically generate the text displayed for two navigation items. [OverrideLinkText] displays the Full Name of the logged in user by default. [CartItemCount] displays the number of items a user has added to the Cart.



If you want to add new navigation items that use these variables, or if you want to modify the existing ones, keep the following guidelines in mind:

- Navigation areas and master pages – The variables only work in the Auxiliary and Footer navigation areas of websites using one of the Sample Site master pages (or copies of these files) or 1700.master. To specify a navigation area, edit a navigation item and in the Options section, select Auxiliary, Footer, or both from the Show in the following navigation areas options.
- [OverrideLinkText] – You can use this variable on its own or with other text. For example, if you only enter the variable, then only the logged in user's name is displayeds as a link. However, if you enter [OverrideLinkText]'s Profile, and Bob Smith logs in, then Bob Smith's Profile is displayed as a link.

- [CartItemCount] – You can use this variable on its own or with other text, but we recommend that you only use it with other text. Otherwise, when no items are in the cart, nothing is displayed for this navigation item.

  To change the data displayed for [OverrideLinkText]

  The variable [OverrideLinkText] can display any property of the NetContact business object. You can change the property displayed by editing the ContactDetail property in your copy of one of the Sample Site themes, or in 1700.master.

  For example, instead of displaying the Full Name of the logged in user, you may want to display only their First Name. To make this change, edit the ContactDetail property to replace all instances of FullName with FirstName. The result should look like this:

```
public string ContactDetail
  {
    get
    {
      if (ViewState["ContactDetail"] != null)
        return (string)ViewState["ContactDetail"];
      _contact = Asi.Business.Contact.ContactController.Contact(Asi.AppContext.CurrentIdentity.UserKey,
                                                  Asi.AppContext.CurrentContext.
                                                    StatefulBusinessContainer);
      return _contact.FirstName != "GUEST" ? _contact.FirstName : String.Empty;
    }
    set { ViewState["ContactDetail"] = value; }
  }
```

Account and profile pages in the Directory

When users select a result after searching the Member site's Directory, or when they navigate to the account pages, the content record that displays depends on the user's permissions. The rules that determine where a user is redirected are defined in the Party.aspx file, located by default in C:\Program Files\ASI\iMIS\Net.

You can modify the information displayed on the account and profile pages by editing the content records described below from Content Designer > Manage content.

Note: In the Member Mobile site, only simple profile pages are shown for member and organization accounts to restrict the amount of information displayed on small screens.

Page description	Users directed to the page	Content record: @/iCore/Contacts/*	Shortcut
Detailed page for staff to manage member accounts	System Administrators Staff with an authorization level of 1 or higher in Customers	ContactLayouts/Account_Page_Staff	FullAccount
Detailed page for member to manage own account	Contacts selecting their own record	ContactLayouts/AccountPage	MyAccount
Detailed Organization account page	System Administrators Staff Organizations selecting their own record	OrganizationLayouts/Account_Page	OrganizationAccount

Simple (non-editable) Contact profile page	Users who do not have permission to edit the account	ContactLayouts/Profile	Profile
Simple (non-editable) Organization profile page	Users who do not have permission to edit the account	OrganizationLayouts/Organization_Profile	Organization

Tracking your site with Google Analytics

Google Analytics tracks and collects important data on how visitors interact with a website. Google Analytics provides reports on the data collected allowing you to assess whether your website is meeting its goals. This tracking is accomplished by adding a Google Analytics script to the website. A new parameter was added to the Manage websites window if you want to use Google Analytics to track data on an iMIS website.

Do the following to track your site with Google analytics:

1. Create a Google Analytics account: google.com/analytics
   - Configure the account.
   - Google Analytics will provide the code for you to paste in the Manage websites window.
2. Add the script to your iMIS website.

   Go to RiSE > Site Designer > Manage websites:
   - Select the website to which you want to add a Google Analytics script.
   - (Properties tab) Expand the Advanced section and paste the entire script, including the tags, in the Google Analytics script field.
   - Click Save.
   - Publish the website.
3. Visit your Google Analytics account to review the data collected.

Synchronizing content on multiple servers

If you have more than one server hosting the same website, take steps to synchronize all servers that host the website. The following are issues to address:

- Theme files: If you modify the website's CSS or master page, or if you apply a different theme, copy the changed files to all other servers.
- Uploaded images: Copy your folder for uploaded images to all other servers, either by direct FTP or by file copy.

  Tip: This is not necessary for ContentFile iPart attached files, which are automatically copied to remote servers when published.
- Hard-coded image paths: If you use different virtual directories on any of your servers, you need to put a variable in any hard-coded image paths to make them publish correctly on all servers. When including images in a Content Html iPart, modify the default Image URL and replace the server name and virtual directory with [Root]. For example, if the Image URL is .../iMIS/images/mypic.jpg, change it to [Root]/images/mypic.jpg.

  Note: When you edit the Content Html iPart, the image appears as a missing-image red X, but it displays correctly when published.
- Navigation area properties: If you modify navigation area properties (using the Easy edit link in the Navigation Areas section of the Website Edit screen) you might need to reset the server's worker process to get it to pick up the changes.
- Publishing servers: When publishing content, iMIS will not consider the content successfully published until all relevant publishing servers have finished publishing it without error. That means that if one of the publishing services corresponding to any of the publishing servers listed in RiSE > Maintenance > Publishing servers is stopped or otherwise inactive, content records will remain in the PublishPending state until the publishing service is started or the entry in Publishing servers is removed and the content is republished.

Improving performance for remote servers

The Easy edit feature of your iMIS content management website might be sluggish on some of your external web servers due to latency in communicating with the iMIS database. For example, it is common for your public-facing web servers to be hosted at a different data center than your iMIS database. You can improve performance by setting up a mirror of the website on your iMIS application server, then directing your frequent Easy edit users to the appserver's URL for the website instead of using the public URL.

Note: If your Easy edit users are working at computers that are outside your organization's firewall, they will need VPN access (or access through a terminal server, for example) to connect to the appserver-hosted version of the website.

Changes to the website's content records and navigation items that are made on any server that hosts the website are automatically picked up by every other server when you publish the changes. However, images that are uploaded during Easy edit sessions must be manually copied to all other servers. Additionally, changes that your web admins make to the site's CSS, master page, and other aspects of the site's template on one server must also be manually copied to all other servers.

Improving Easy edit performance

The following procedure assumes that you already have an external iMIS content management website on which your Easy edit users are experiencing slow performance. You will be changing the website's definition to also host the website on your application server, then advising your Easy edit users to use the new appserver-hosted website for their Easy edit sessions:

1. Modify the website's definition to specify that it be hosted by your iMIS application server as well:

   Go to RiSE > Site Designer > Manage websites:

1. Select the website you want to modify.
2. Click Edit.

3. In the URL(s) pointing to the IIS website root field, enter a comma-delimited list of URLs that point to the root of the iMIS application on your iMIS appserver and to the root of the iMIS content management application that you installed on each external web server. For example, if you already had two external web servers defined for this website, the list should look similar to the following when you have added the URL that points to your iMIS appserver: http://www.my-
   pub-
   lic-
   domain1.or-
   g/wcm/,http://www.mypublicdomain2.org/wcm/,http://www.myiMISappserver.com/iMIS/
4. If using SSL, add the secure addresses to the Secure URL(s) pointing to the IIS website root field in the same order as above.

   Important: Restart IIS whenever you change the Secure URL(s) pointing to the IIS website root setting. Note that localhost is not a valid Secure URL.
5. Click Save to save your changes.
6. Click Cancel.
7. From the toolbar, click Publish.
8. Select Publish children as well? to publish all of the website's navigation items to the new instance of this website on the iMIS application server.
9. Click OK. Note that the website's content records will not be visible on this new instance until a later step. It may take up to 15 minutes for the public and internal sites to reflect the updated navigation.
10. Click Close.
2. Modify the definition of all content folders used by this website to also publish their content records to the new instance of this website on the iMIS application server. This will usually be only the website's root content folder (the one with the same name as the website itself), but your organization might also have some additional content folders that are

used for content shared among several different websites. For each of these content folders, do the following:

1. Go to RiSE > Content Designer > Manage content.
2. Select the content folder you want to configure.
3. Click Edit.
4. From the Publish on Servers dropdown list:

- If the current value is Inherit, do not change the value.
- If the value is Custom, then leave all currently selected checkboxes and also select the checkbox for the publishing server code used by your iMIS application server.

5. Click Save to save your changes.
6. Click Cancel.
7. From the toolbar, select Publish.
8. Select Publish All Items to include all of the folder's content records.
9. Click OK.
10. Click Close. Repeat the steps for each content folder used by the website.

3. Make sure the website's template files exist on the public iMIS content management server, the appserver, and the internal iMIS content management server, if applicable. If the files are missing from any of the servers, manually copy the files to the corresponding locations.
4. Visit your public iMIS content management website and the appserver's website to verify that your changes are successful.
5. Advise your frequent Easy edit users to visit the URL for the iMIS appserver-hosted instance of the website and avoid using the public-facing URLs.

Complying with the EU's Electronic Privacy Directive

To comply with the EU Directive on Privacy and Electronic Communications, iMIS has added support for your organization to display a pop-up notification informing visitors that cookies are used on your site. This popup also includes a link to a longer sample privacy policy we have provided. You can find more information about this law on the ICO website.

Setting up cookie notifications requires that you edit your master page, review (and modify as needed) the privacy policy provided, and add a JavaScript file to iMIS.

To display cookie notification popups

1. Edit the master page of your website (by default located in C:\Program Files\ASI\iMIS\Net\Templates\MasterPages) to add the following items:

- Just under the , add the following divs:

Note: You can edit this content to change the look and feel of the popup to match the design of your site.

```
<div id="EUCookieMessage" style="display: none;">

        <div id="EUCookiewarningBack" style='z-index:999; position:absolute; width:100%;height:100%;background: rgb(0, 0, 0) transparent;background: rgba(0, 0, 0, 0.6);filter:progid:DXImageTransform.Microsoft.gradient(startColorstr=#99000000, endColorstr=#99000000);-ms-filter: \"progid:DXImageTransform.Microsoft.gradient (startColorstr=#99000000, endColorstr=#99000000)\"'>

        <div id="EUCookiewarning" style-='margin:19%;padding:10px;width:62%;height:20%;background:white;color:black'>

        <span id="EUCookiewarningtext"></span>

        <a href="#" class="close-notify">Continue</a>
```

```
</div>
</div>
</div>
```

- At the bottom of the master page, just before the line <!-- Facebook API is loaded into here -->, add the following JavaScript reference:

```
<script type="text/javascript" src="AsiCommon/Scripts/EUCookieWarning.js"></script>
```

2. Review the sample privacy policy provided as a content record in iSamples/Member/Privacy_Policy, and update as needed for your organization.
3. Create a JavaScript file named EUCookieWarning.js containing the code below, and add it to the Scripts folder (by default located in C:\Program Files\ASI\iMIS\Net\AsiCommon\Scripts).

   Note: The displayNotification function in this file contains the content of the popup notification displayed to users the first time they visit a page in your website. Be sure to update the privacy policy link in this message to point to the content record you want to display for this purpose. You can also edit the rest of the content for the needs of your organization.

```
function getCookie(c_name)
{
var i,x,y,ARRcookies=document.cookie.split(";");
for (i=0;i<ARRcookies.length;i++)
 {
 x=ARRcookies[i].substr(0,ARRcookies[i].indexOf("="));
 y=ARRcookies[i].substr(ARRcookies[i].indexOf("=")+1);
```

```
  x=x.replace(/^\s+|\s+$/g,"");
  if (x==c_name)
    {
    return unescape(y);
    }
  }
}

function displayNotification()
{
if (typeof jQuery('#EUCookieMessage' != 'undefined'))
{
      jQuery('#EUCookieMessage').fadeIn("slow");
      if (typeof jQuery('##EUCookiewarning #EUCookiewarningtext' != 'undefined'))
      {
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("In order for this site to work correctly we need to store a small file - called a cookie - on your computer.<br/>");
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("We use cookies to store information to make your visit to this site richer and to personalize information according<br/>");
```

```
        jQuery("#EUCookiewarning #EUCookiewarningtext").append("to your interests. See our <a href=\"iSamples/Member/Privacy_Policy.aspx\" target=\"_blank\">privacy policy</a> for more information on what cookies are, how we use them<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("and how to change your preferences.<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("By continuing to use this site you are consenting to our use of cookies.<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");

    }

    var closeBtn = jQuery('#EUCookieMessage a.close-notify');

    closeBtn.click(function() {

    setCookie("IMISEUCookieConfirm",null,3650);

    jQuery('#EUCookieMessage').fadeOut("slow");

    return false;

        });

    }

}


function setCookie(c_name,value,exdays)

{

var exdate=new Date();

exdate.setDate(exdate.getDate() + exdays);

var c_value=escape(value) + ((exdays==null) ? "" : "; expires="+exdate.toUTCString());
```

```
document.cookie=c_name + "=" + c_value;
}

function checkCookie()
{
var cookieName="IMISEUCookieConfirm";
var cookieChk=getCookie(cookieName);
if ( typeof cookieChk === "undefined")
 {
 displayNotification();
 }
}

checkCookie();
```

Website concepts

The terms described in this section explain the basic concepts of iMIS content management.

Concept: master pages and themes

The look and feel of an iMIS content management website comprises the general page layout, colors, graphics, and fonts used for all rendered pages in the website. This look and feel is defined by the design's master page and theme. Master pages and themes are basic elements of ASP.NET websites, and detailed information about developing and customizing master pages and themes can be found in Microsoft developer resources for ASP.NET development such as the Microsoft Developer Network.

- If you want to customize one of the out-of-the-box themes, we recommend that you start with a copy, so that your changes are preserved when you upgrade.
- If you prefer to use your own hand-built master pages and themes, you must first place them in the appropriate MasterPages and App_Themes folders beneath the IIS website root that you plan to associate with this iMIS content management website. This ensures that the master pages and themes are available for selection when defining the properties of the website. You must also ensure that the master pages meet all requirements for compatibility with iMIS content management.

  The master page is an ASP.NET file that specifies the general page layout of all pages in the website. Do not confuse this with the content layout used for the main content area of each page. The master page defines everything that appears on a rendered page, and where they appear, except for two things:

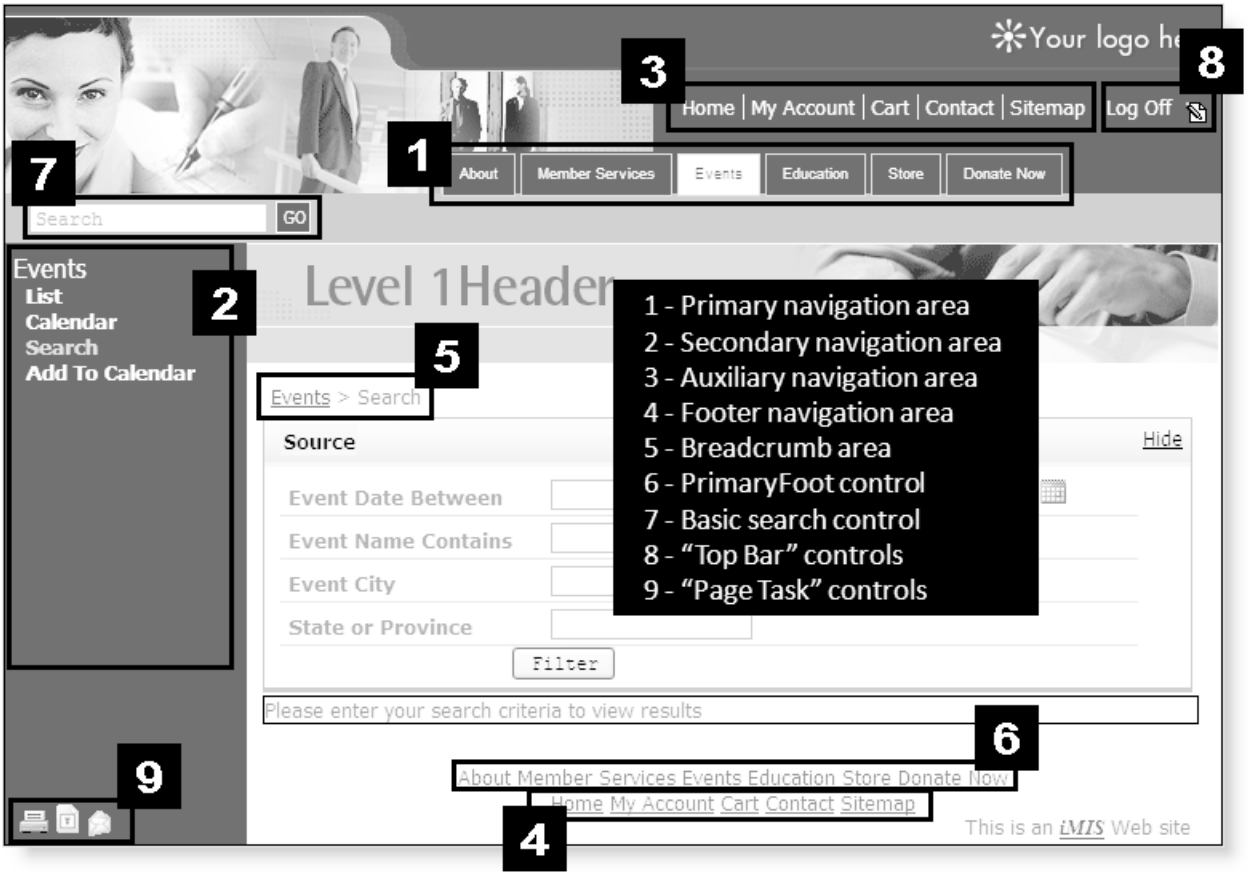
- The rendered content visible in the Main Content Area of each page is controlled by the navigation item for that page. The master page defines only where this content area appears on the website pages, and the content area's exact dimensions.
- The navigation items in the website's sitemap define the actual navigation link text and breadcrumb text shown in the navigation areas. The master page defines only the location, appearance, and behavior of the available navigation areas for the website. Which of the available navigation areas are actually used for the website is defined in the properties of the website itself, and each navigation item specifies the exact navigation areas in which it is displayed.

  The theme is a collection of files that specify exactly which colors, graphics, and fonts are used in all rendered website pages, giving them a consistent appearance. The theme comprises all the cascading style sheets used by the master page and available for use in a content layout's iPart zones and iParts, as well as all the graphics used by the master page, as opposed to graphics used in content records. Some themes might also include ASP.NET skin files, which define property settings for ASP.NET Web server controls.

Concept: navigation areas and breadcrumb areas

Navigation areas are special ASI-developed controls used in master pages that create automated lists of navigation links. All ASI-developed master pages are designed to support the four default navigation areas and the breadcrumb area shown in the following diagram, but you can define up to 30 navigation areas in the system and add the corresponding elements to support those navigation areas to any master page.

The breadcrumb area appears automatically on every site, but you must specify exactly which navigation areas to enable globally for use by the navigation items in the website's sitemap. The four default navigation areas provided with iMIS content management are shown in the following diagram:



When a navigation area is globally enabled in the definition for an iMIS content management website, a checkbox representing that navigation area becomes available for selection when you are defining navigation items in the sitemap for the website. Whether

a particular navigation item actually appears in one of the enabled navigation areas of the website is determined by the specific navigation area checkboxes you select for that navigation item when you are defining it.

All master pages fully support the breadcrumb area and all four of the default navigation areas. However, if you modify the definition of any of the default navigation areas in iMIS content management, you might need to revise the master pages to support the changes that you have made.

To integrate your own hand-built master pages with iMIS content management, if you plan to use the breadcrumb area and navigation areas available to iMIS content management websites, you must ensure that you add the appropriate elements to your master page to support them. Similarly, if you define additional navigation areas in iMIS content management, you must modify your master pages to support these additional navigation areas.

Note: The controls that display the Logon/Logoff link and the icon that toggles Easy edit mode, both of which appear by default at the right of the Auxiliary navigation area, are not a part of the Auxiliary navigation area, so they are unaffected if you remove or move the location of this navigation area.

Concept: publishing iMIS content

When you create or change an existing iMIS content management website, navigation item, content folder, content record, or any other iMIS content management definition object in the Document System and click Save, nothing happens except that iMIS stores a Working version of that object in the iMIS database. It is only when you click Publish that iMIS actually implements the new version of the definition object, replacing the previous Published version of the object with this new Working version and then marking it with a status of Published to indicate that it is now the current active version.

When you publish the various types of iMIS content management definition objects, different things happen depending on what type of object is published.

Note: The following descriptions generally apply to the publishing option Publish Working Items Only. If you select either of the other publishing options, then objects in any state are published.

- Websites – No downstream processes happen other than iMIS content management creates a corresponding sitemap if it is an entirely new website, so that you have a structure into which you can add navigation items. If you have developed your own custom master pages and themes, the people in your organization who perform website administration should have already placed the necessary files on the servers that will host the website.
- Navigation items – When a browser first requests a website URL from the iMIS application server or an external web server that has been prepared to host iMIS content management websites, the iMIS content management code on that server examines the Published sitemap object in the iMIS database and then builds a corresponding in-memory representation of the sitemap's navigation structure. A timer process then rechecks the iMIS database every five minutes by default to determine whether a newer version of the sitemap object has been published, and, if so, the iMIS content management code on that server rebuilds its in-memory sitemap structure for that website.

  Note: You can change this default five-minute polling interval if desired, but be aware that each polling process consumes a small amount of system resources so there is a performance tradeoff in specifying a more frequent polling interval. To change the polling interval, edit the value of the Sitemap.CachePeriod key (expressed in minutes) in the <SystemParams> declaration in the web.config file for the iMIS application (IIS application \iMIS).
- Content folders – No downstream processes happen other than iMIS checks the status of all descendant content records and sub folders and if iMIS finds any that are currently in a Working state, iMIS automatically publishes them as well. This enables you to spend several days working on a major change to your website content that encompasses many content records, and then publish all those changes in one action by publishing a content folder high enough in the folder hierarchy to cover all the content records that are in a Working state.

Changes made to the Access Settings of a content folder that are applied to all descendants are saved to the Published descendant content records without the need to republish each record. Security checks to determine whether the rendered version of a content record should be served to the requesting browser are performed by examining the current Access Setting values of the Published content record object in the iMIS database.

- Content records – iMIS checks the value of the Publish on Servers field in the parent content folder to determine which publishing servers should handle the publishing of the content record. iMIS then creates a separate publishing request in the iMIS database for each associated publishing server. Meanwhile, every five minutes by default, the publishing services (AsiPublishing15) installed on every server that hosts iMIS content management websites are polling the iMIS database to determine whether there are any new publishing requests designated for their corresponding publishing server.

  If so, the publishing service examines the Published content record object in the iMIS database and then renders a corresponding .aspx file and places that file in the appropriate location in the server's local file system so that IIS can serve that page to browsers that request the content record's corresponding navigation item link.

  Note: You can change this default five-minute polling interval if desired, but be aware that each polling process consumes a small amount of system resources so there is a performance tradeoff in specifying a more frequent polling interval. To change the polling interval, edit the definition for the corresponding publishing server and specify the desired polling interval in the Frequency field.

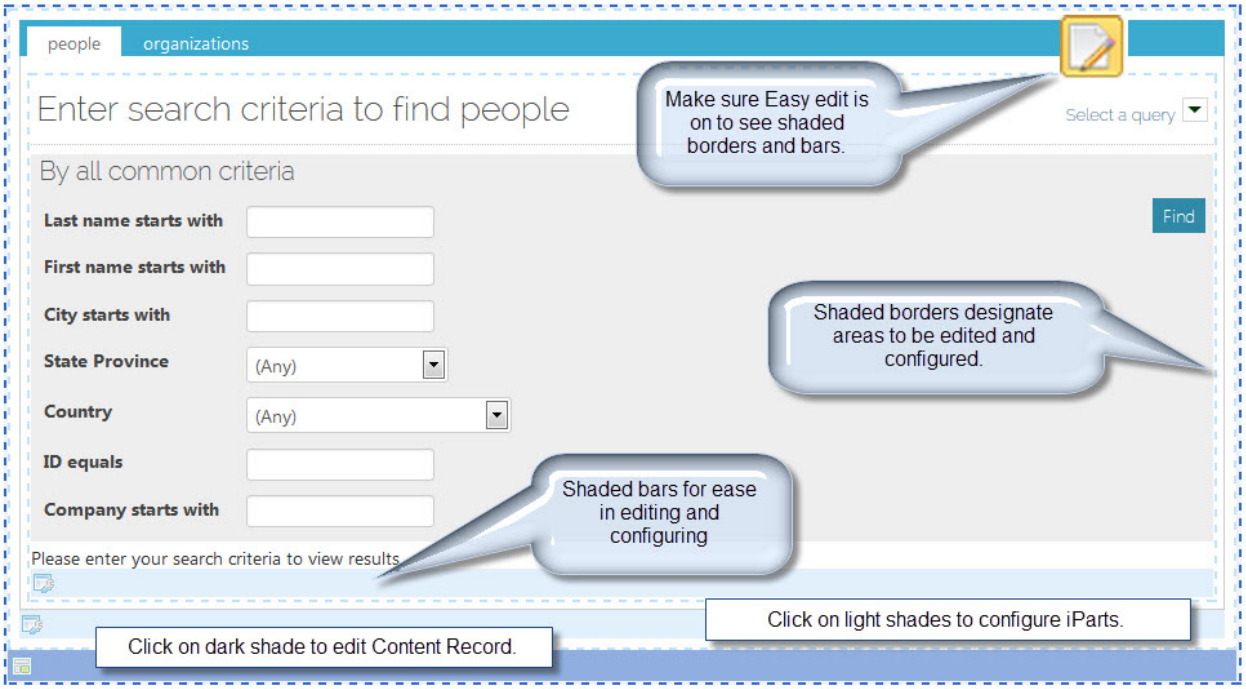
  Note: The iMIS content management configuration field CM.PublishingMaxNumOfAttempts (located in Set up content management > Content designer configuration) determines how many times each publishing service will attempt to process a system publishing request before it flags the request as failed. This prevents overconsumption of system resources if there is a connection issue or other issue that is preventing the publishing service from successfully processing the request.

- Content layouts – No downstream processes happen. When you define a content record, iMIS populates the list of available Page Layouts by examining all the Published versions of content layout objects in the iMIS database.
- Content types – No downstream processes happen. When you define a content record, iMIS examines the Published content type objects in the iMIS database to determine how to display the corresponding iPart when added to the content record.
- Tagged list formats – No downstream processes happen. When you add a ContentTaggedList iPart to a content record, iMIS populates the list of available List Formats by examining all the Published tagged list format objects in the iMIS database.

Concept: Easy edit

The Easy edit feature enables you to browse, or surf, to update your content records in their rendered form. You can quickly open a web page's underlying content record (or even a specific iPart within the content record) for editing. When you have saved your changes, you can continue surfing the website and making further content revisions as needed.

Full, Casual and Public users of iMIS can use the Easy edit feature, provided they are members of at least one content authority group (CAG) and they have been granted the necessary Document System permissions on content records. This is the only way that Casual and Public users can define iMIS content management content.



Concept: user-defined fields (UDFs)

User-defined fields (UDFs) in iMIS content management are created differently, and serve a very different purpose, than user-defined fields in iMIS contact records:

- The UDFs found in iMIS contact records enable you to collect custom information about a contact. These contact UDFs are not available for use in iMIS content management.
- The UDFs found in iMIS content management are primarily useful as a way to capture additional properties of the content in content records, and to provide a controlled list of search criteria for use in iMIS content management only. These iMIS content management UDFs can be used in three ways:
- As a value added to the keywords <META> element in the rendered page for the content record, which enables searches performed through the iMIS content management search engine (but not by typical external web-based search engines) to locate the content record by searching for this value. This behavior is controlled by the Use in Search? property of an iMIS content management UDF.
- As a search filter in AdvancedSearch iParts, applied to the initial result set based on the tags and keywords specified in the search.

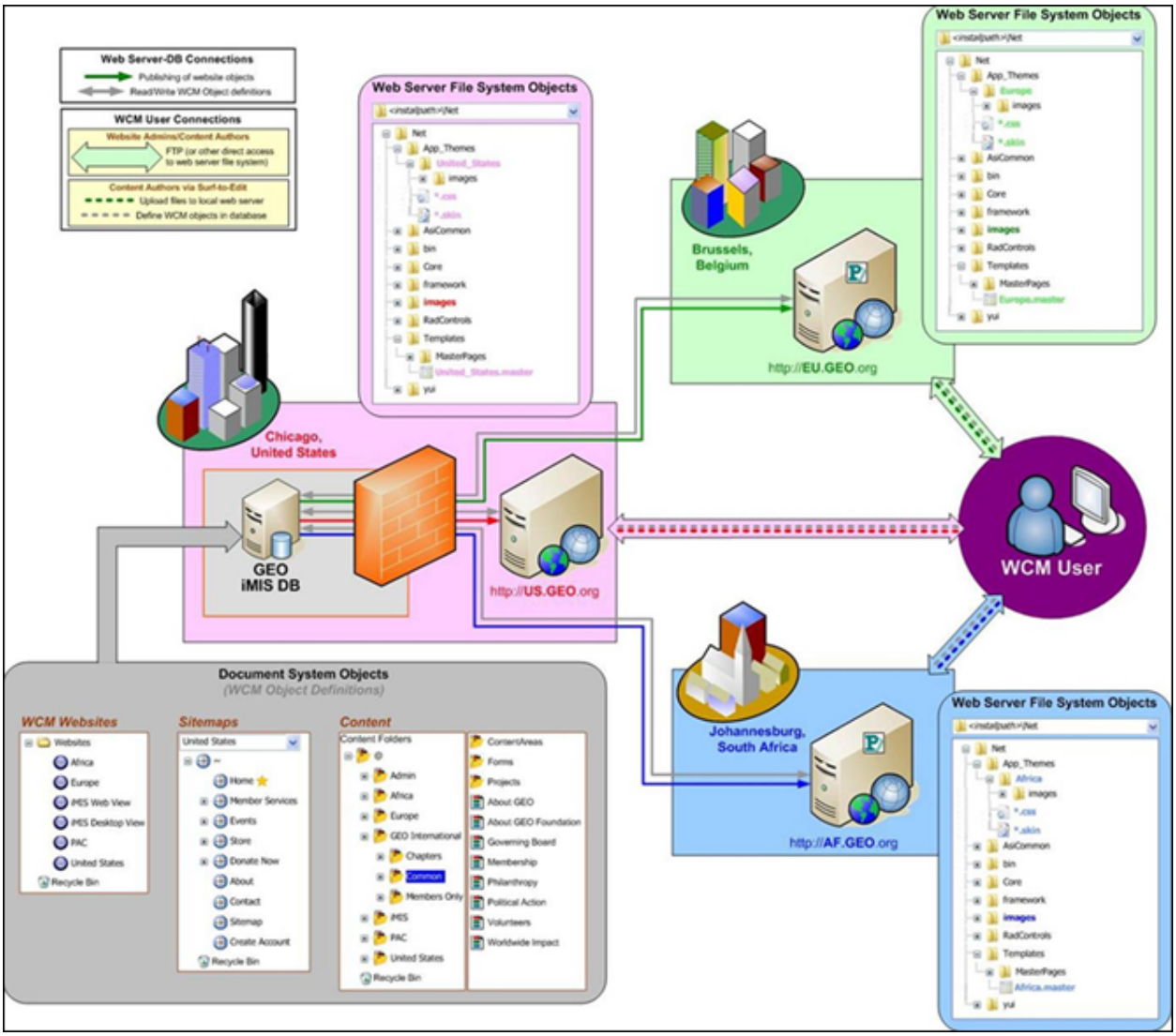
- As both filtering criteria and sorting criteria in ContentTaggedList iParts. A date-oriented UDF can be used to filter the initial result set based on the chosen tags, and a different UDF of any type can be used to sort the the final result set.

  Every UDF defined in iMIS content management is added as a new custom property to every content record, and can be displayed in a wide variety of formats, from a simple text field to a drop-down list, to a calendar control, to a set of radio buttons, and so on. In the advanced search panel rendered from an AdvancedSearch iPart, the user-defined field appears exactly the same way that it does in content records. This enables iMIS content management website users to specify UDF values for advanced searches in the same manner that the UDF values are chosen when authoring content. For example, a date-oriented UDF will have a calendar control that makes it easy to select a date.

Concept: websites and web server interaction with iMIS

An iMIS content management website is slightly different from a Microsoft Internet Information Services (IIS) website. While the rendered output of an iMIS content management website provides a total website experience for visitors to the site, a single iMIS content management website can actually be hosted on multiple web servers even though you are only maintaining a single website in your iMIS content management environment. Within the internal structure of IIS, an iMIS content management website is usually maintained as a subset of the iMIS application, but you can configure IIS to host iMIS content management websites as individual IIS applications or even as individual IIS websites.

The following diagram illustrates the connection points between multiple IIS web servers that host iMIS content management websites, the iMIS database, and users.


Web Server-DB Connections
Publishing of website objects
Read/Write WCM Object definitions
WCM User Connections
Website Admins/Content Authors
FTP (or other direct access to web server file system)
Content Authors via Surf-to-Edit
Upload files to local web server
Define WCM objects in database
Web Server File System Objects
Web Server File System Objects
Brussels, Belgium
http://EU.GEO.org
Chicago, United States
GEO iMIS DB
http://US.GEO.org
WCM User
Johannesburg, South Africa
http://AF.GEO.org
Web Server File System Objects
Document System Objects
(WCM Object Definitions)
WCM Websites
Sitemaps
Content

Creating your own websites

This section guides you in developing, implementing, and maintaining your websites.

Working with RiSE Sites

Because new and improved iParts and features are added to iMIS with every update, iMIS installs sample sites and a demo database that, together, fully demonstrate the more complex enhancements. These sample sites and data will remain synchronized with the ever-evolving state of iMIS, and will showcase new iParts, functionality, and UI improvements as they become available.

Using sample sites

iMIS installs with sample sites, such as Member and Member Mobile. The Member site shows how to build a RiSE site for your members and how to combine related iParts for features such as Commerce and Events. The Member Mobile site shows how to build a site optimized for mobile devices, such as smart phones and tablets.

It is easy to create your own customized website by using and copying a sample site. For detailed instructions on this process, see the topic Creating a site.

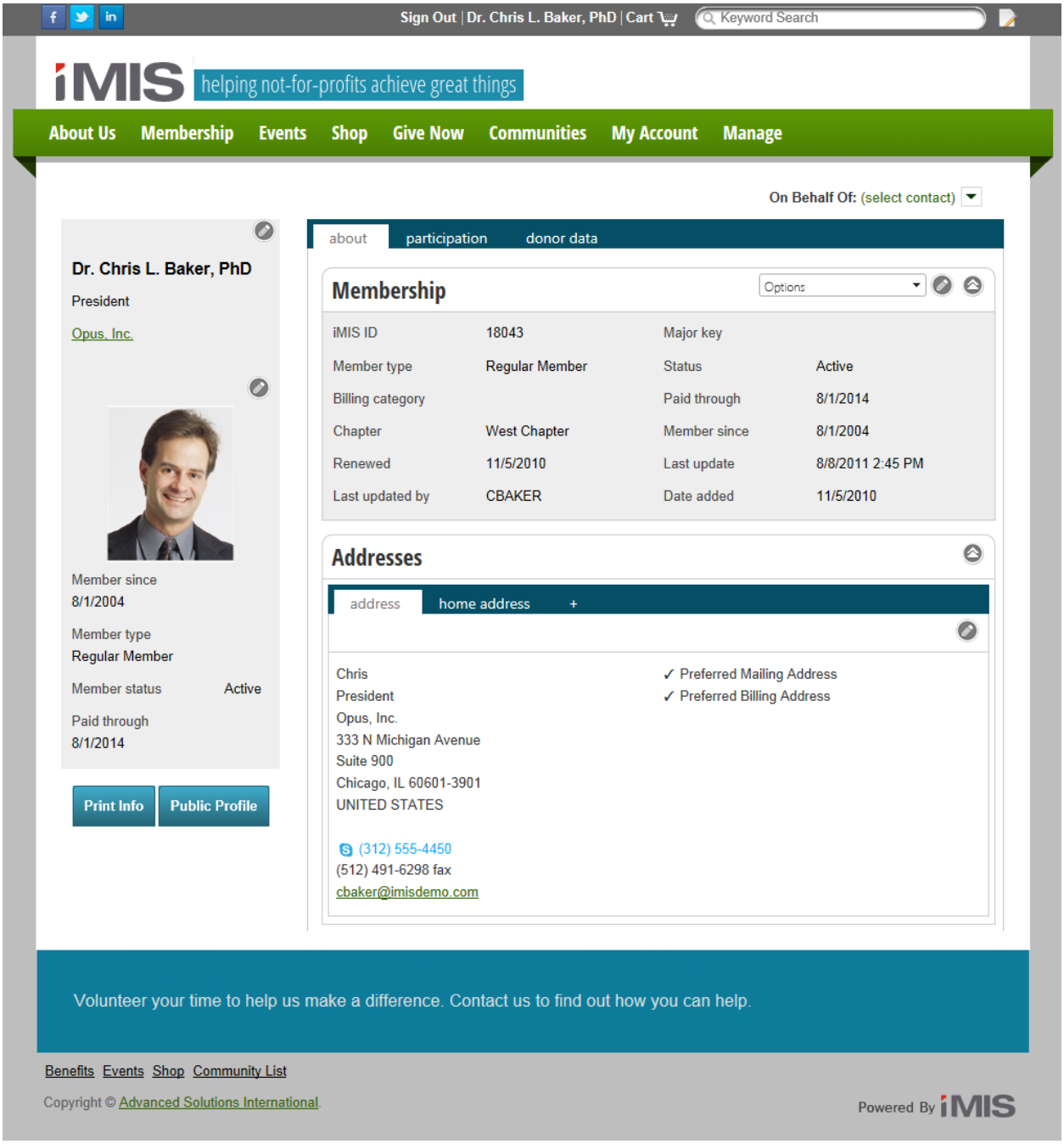
Note: By default, the starter sample sites are marked as Inactive. If you want to use a sample site, copy the site and enable the Is this website active option (RiSE > Manage websites > click the expand icon in the Status area).

By browsing to your Member site (http://yourvirtualroot/mbr), and to your Member Mobile site (http://yourvirtualroot/mobile), you can see how the iParts and pages present your current users and content. For example, if you have events currently defined and set to Show on web, you will see them populated on the Events page.

Tip: Upgrades overwrite the Member and Member Mobile sites, but you can add new content records and navigation items to the site for your own testing purposes. Upgrades will preserve your test objects.

Member site

The Member site offers a rich self-service experience for your members and prospects. This site enables you to choose from a variety of visual themes, change navigation in just a few clicks, and add any number of query-driven iParts to present dynamic information to your site visitors.



Member Mobile site

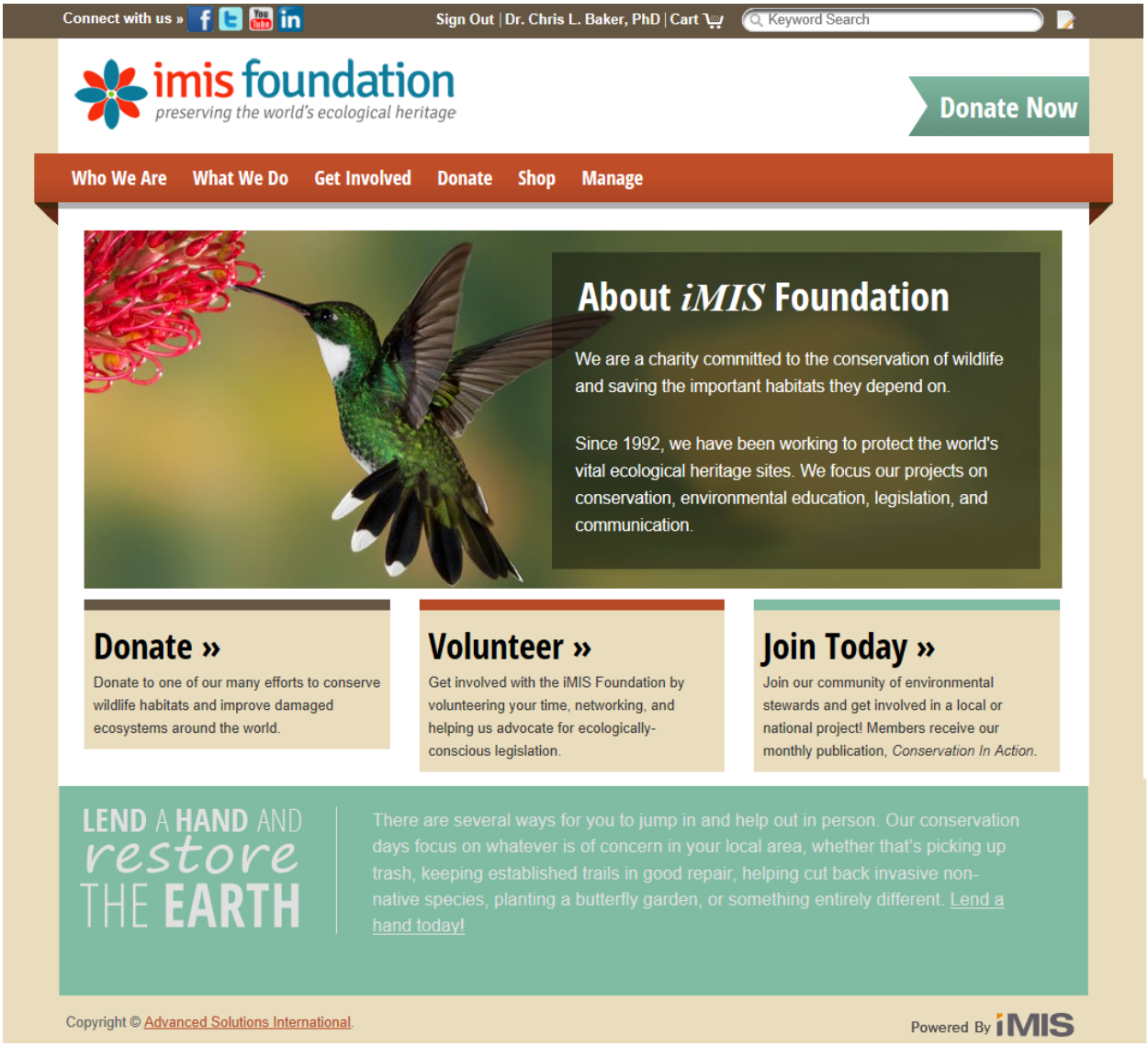
The Member Mobile site renders a version of the Member site that is optimized behaviorally and formatted for use on smart phones and tablets. This site is accessible by your members and by your staff who are working off-site or on the run.

Upcoming Spring Conference

Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.

Donor site

The Donor site offers a rich and highly customizable experience for fundraisers conducting charitable campaigns and product sales with the public.



Annual Conference site

The Annual Conference site offers a "micro site" experience to support your critical projects, such as an organization's annual conference. By shaping the site with unique content and structure, you can maximize the impact of the project without affecting your main

site or micro sites from different years. At the same time, iMIS seamlessly integrates content between your various sites.

Annual Conference Mobile site

The Annual Conference Mobile site renders a version of the Annual Conference that is optimized behaviorally and formatted for use on smart phones and tablets for both by your members and staff who are attending events. Attendees gain quick access to their personalized programs, activities, and event feeds – and can instantly look up directory profiles of those attending with them.

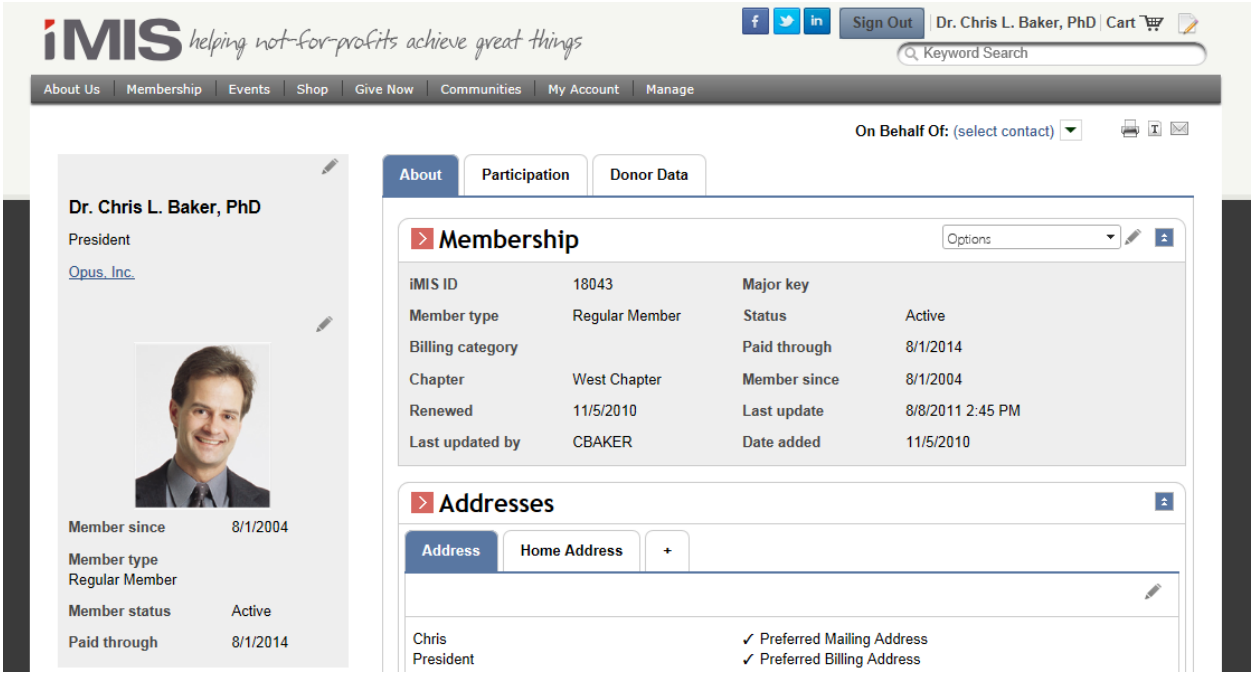
AT&T
1:19 PM
iMIS
Cart
Annual Conference
The Annual Conference is fast-approaching. Don't miss out – register today!
October 30 - November 1
Cairns, Australia
Learn More
HOME
NEWS

To use the DemoDB with the sample sites

To see the sample sites in action with sample data, you can connect to the demonstration database (DemoDB). This database includes a set of users and content sufficient to experience how the iParts work together.

1. Point your instance of iMIS to the DemoDB, which installs with iMIS.
2. Browse to the sample sites for this instance.
3. Sign in as Chris Baker: cbaker/cbaker.

   This user has full privileges to the system, so you can exercise all aspects of content lay-out, iPart configuration, and use.



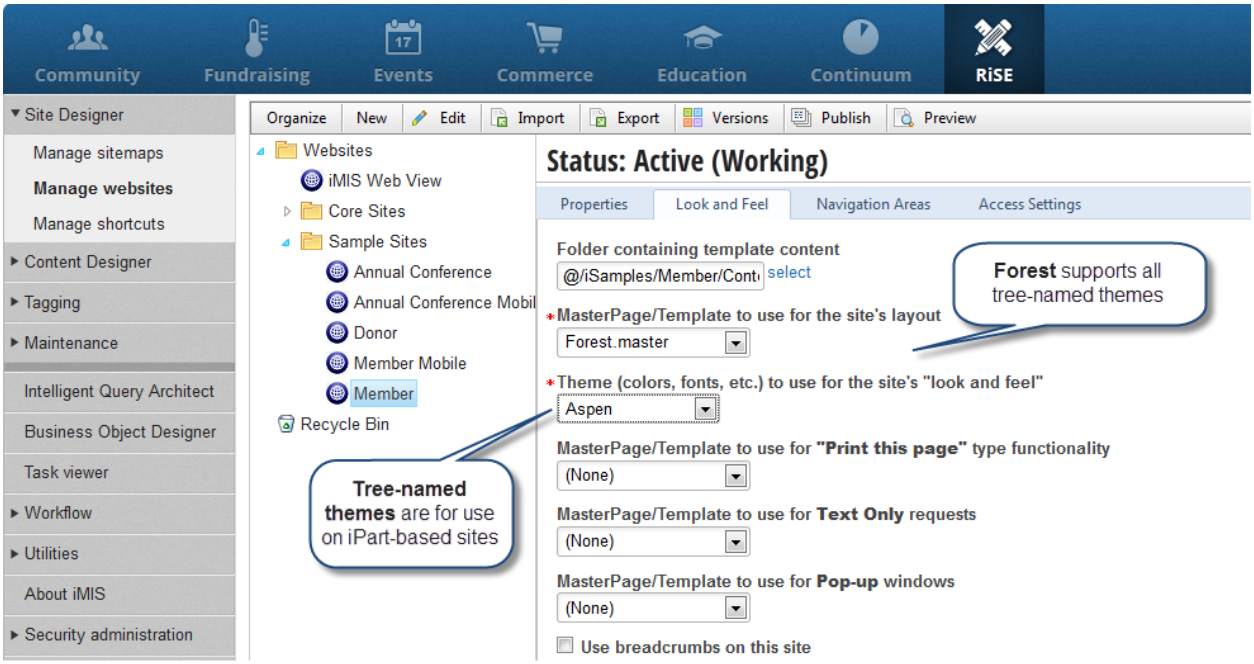
4. Change the password for this user if you want to prevent unauthorized access to your demo site.
5. When you are ready to start making changes to the site you must make a copy. This helps you to avoid losing your changes when you upgrade iMIS. For more information on this strategy, see Creating a site. Items affected by upgrades span the demo data and the site itself:

- Site definition and navigation items
- Content records, including iPart configuration, arrangement, and connection
- User records and demo data (products, events, subscriptions)

Sample themes and master pages

You can change the look and feel of the sample sites by selecting different combinations of a Master Page and its matching Theme. If you want to modify a particular design for your website, make sure you create a copy of the master page and theme before making any changes. See Creating a site for more information.

Note: iMIS themes give you a head start on developing your website. To provide you an idea of how things could look, we have used numerous pictures, illustrations, and images that we purchased under a limited license for ASI's use. The icons can be used on your website, but if you reuse any of the other images, you will need to buy a license. We acquire the majority of our images from iStockPhoto and most are available in the range of $15-$50; much less than the cost and labor of creating them on your own. If you have any questions, please contact us.



Example: Selecting a theme created for the Forest master page

Important: If possible, avoid customization to master pages. If you do need to make changes, make the changes in a copy of the master page. Any customizations performed to the out-of-the-box master pages will be overwritten after an upgrade.

The following designs are available out-of-the-box for iMIS sample sites.

City.master

The set of city-named themes support RiSE sites and can be used interchangeably with the City master page.

Available theme:

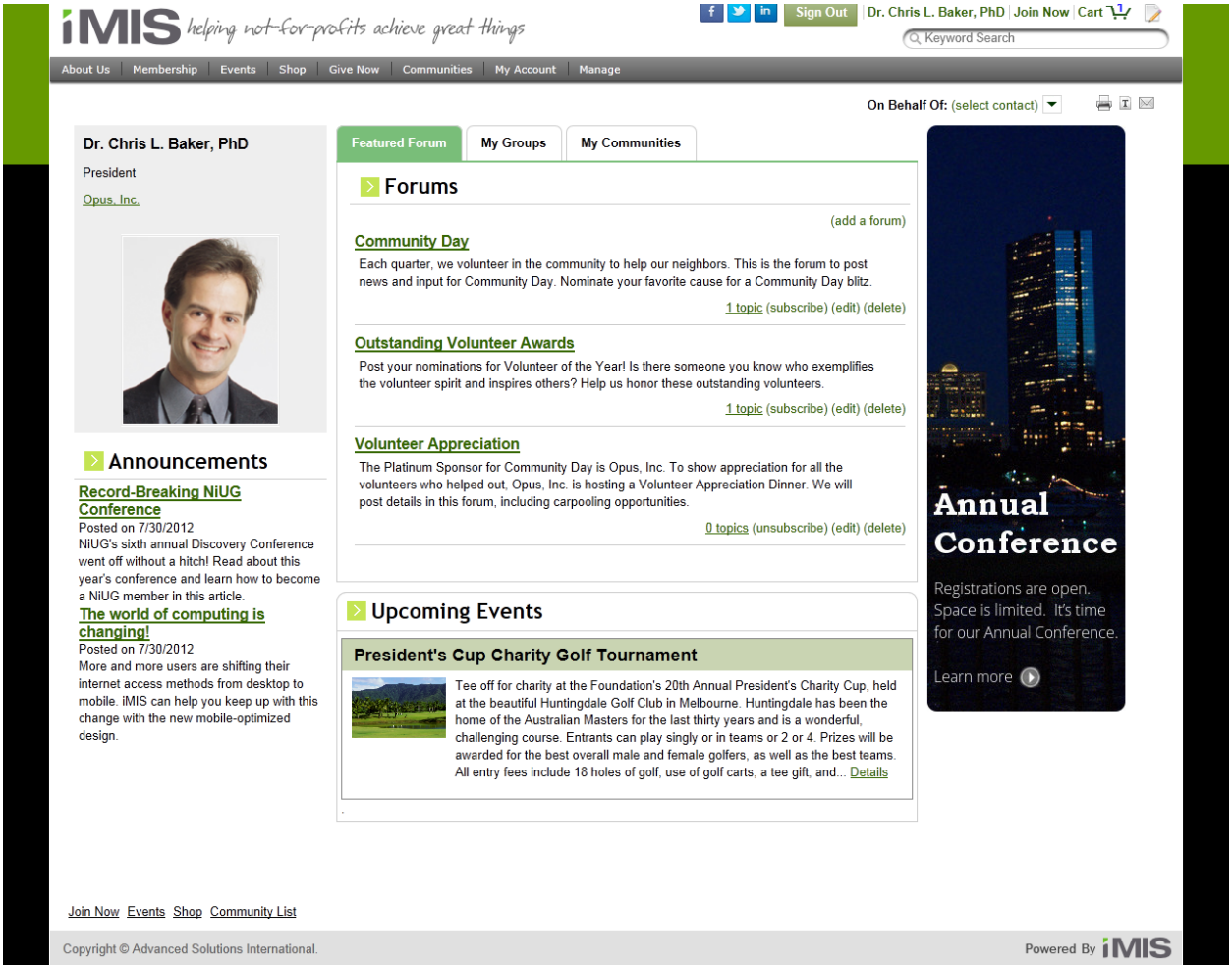
Austin

Forest.master

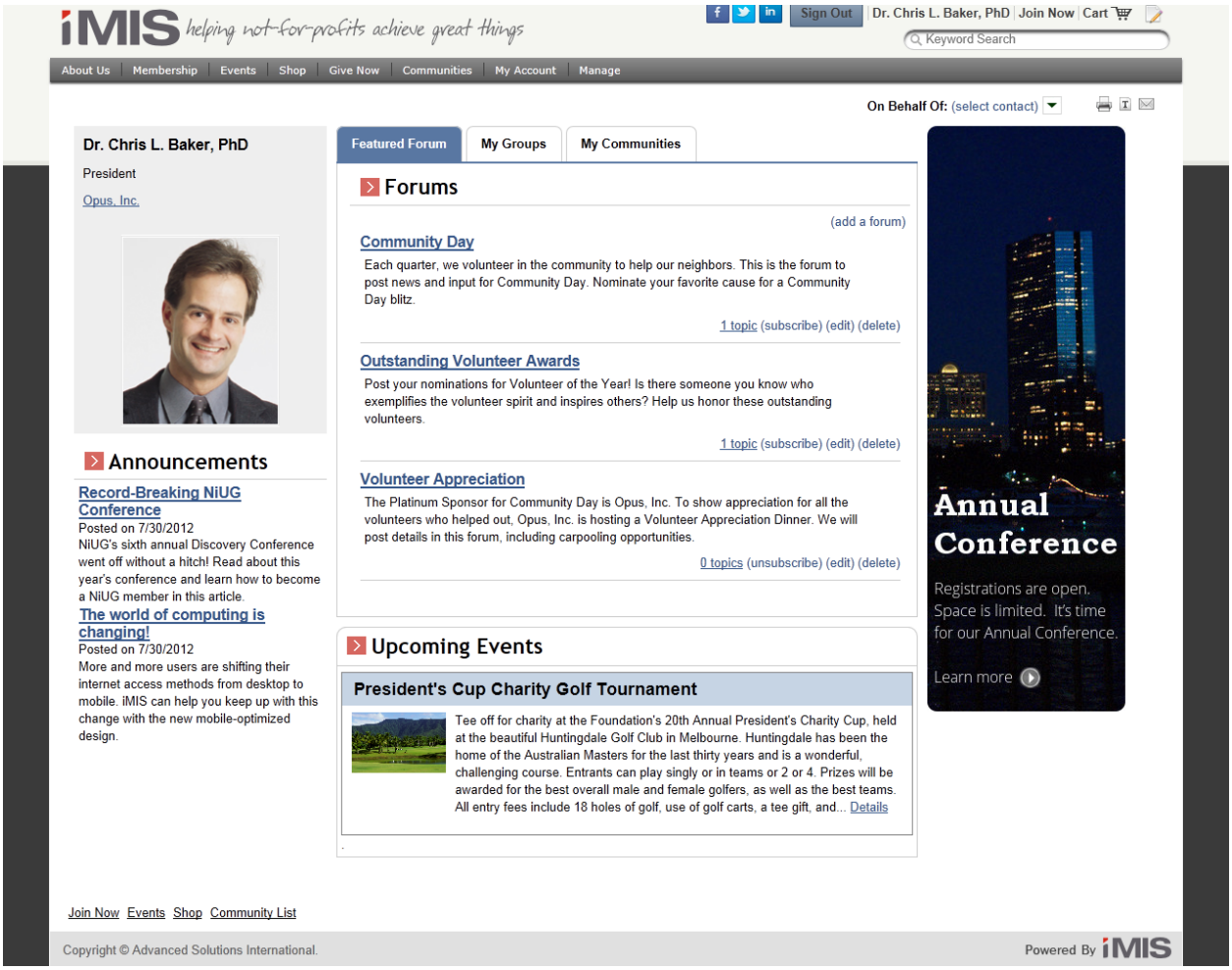
The set of tree-named themes support RiSE sites and can be used interchangeably with the Forest master page.

Available themes:

Aspen



Aspen2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On Behalf Of: (select contact)
Dr. Chris L. Baker, PhD
President
Opus, Inc.
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Record-Breaking NiUG Conference
Posted on 7/30/2012
NiUG's sixth annual Discovery Conference went off without a hitch! Read about this year's conference and learn how to become a NiUG member in this article.
The world of computing is changing!
Posted on 7/30/2012
More and more users are shifting their internet access methods from desktop to mobile. iMIS can help you keep up with this change with the new mobile-optimized design.
Featured Forum
My Groups
My Communities
Forums
(add a forum)
Community Day
Each quarter, we volunteer in the community to help our neighbors. This is the forum to post news and input for Community Day. Nominate your favorite cause for a Community Day blitz.
1 topic (subscribe) (edit) (delete)
Outstanding Volunteer Awards
Post your nominations for Volunteer of the Year! Is there someone you know who exemplifies the volunteer spirit and inspires others? Help us honor these outstanding volunteers.
1 topic (subscribe) (edit) (delete)
Volunteer Appreciation
The Platinum Sponsor for Community Day is Opus, Inc. To show appreciation for all the volunteers who helped out, Opus, Inc. is hosting a Volunteer Appreciation Dinner. We will post details in this forum, including carpooling opportunities.
0 topics (unsubscribe) (edit) (delete)
Upcoming Events
President's Cup Charity Golf Tournament
Tee off for charity at the Foundation's 20th Annual President's Charity Cup, held at the beautiful Huntingdale Golf Club in Melbourne. Huntingdale has been the home of the Australian Masters for the last thirty years and is a wonderful, challenging course. Entrants can play singly or in teams or 2 or 4. Prizes will be awarded for the best overall male and female golfers, as well as the best teams. All entry fees include 18 holes of golf, use of golf carts, a tee gift, and... Details
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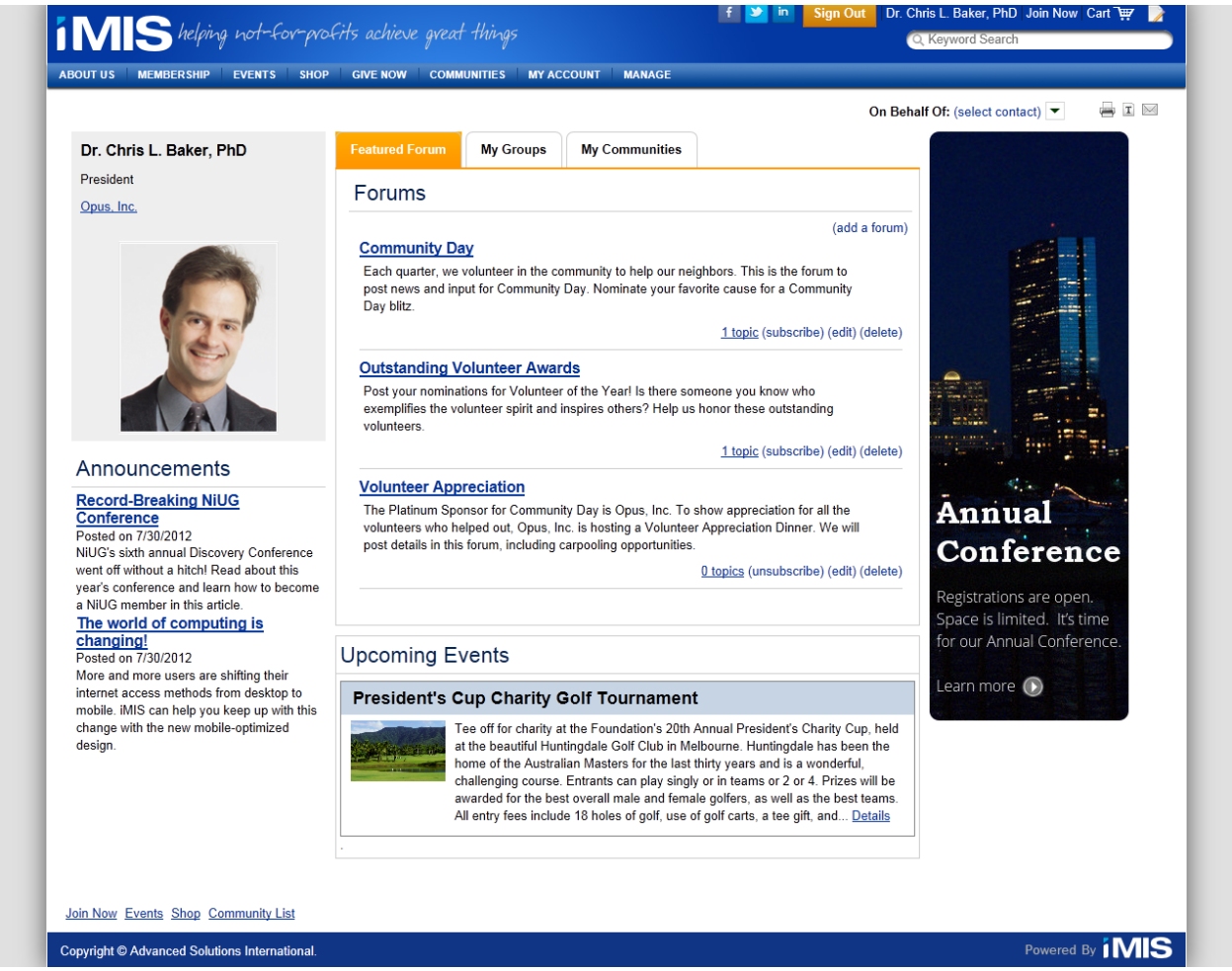
Birch

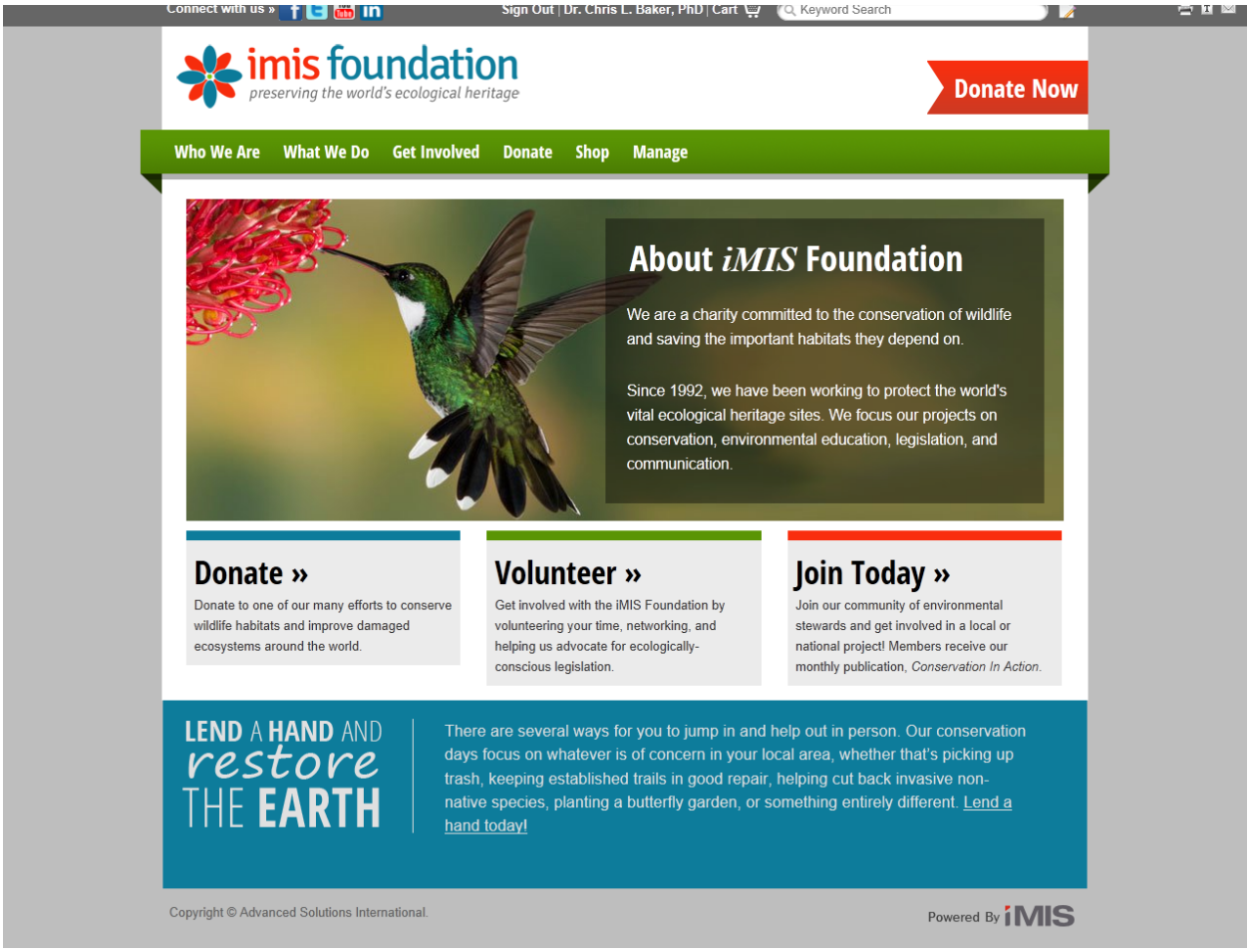


Planets.master

The set of planet-named themes support RiSE sites and can be used interchangeably with the Planets master page.

Available themes:

Mercury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We are a charity committed to the conservation of wildlife and saving the important habitats they depend on.
Since 1992, we have been working to protect the world's vital ecological heritage sites. We focus our projects on conservation, environmental education, legislation, and communication.
Donate »
Donate to one of our many efforts to conserve wildlife habitats and improve damaged ecosystems around the world.
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Join Today »
Join our community of environmental stewards and get involved in a local or national project! Members receive our monthly publication, Conservation In Action.
LEND A HAND AND restore THE EARTH
There are several ways for you to jump in and help out in person. Our conservation days focus on whatever is of concern in your local area, whether that's picking up trash, keeping established trails in good repair, helping cut back invasive non-native species, planting a butterfly garden, or something entirely different. Lend a hand today!
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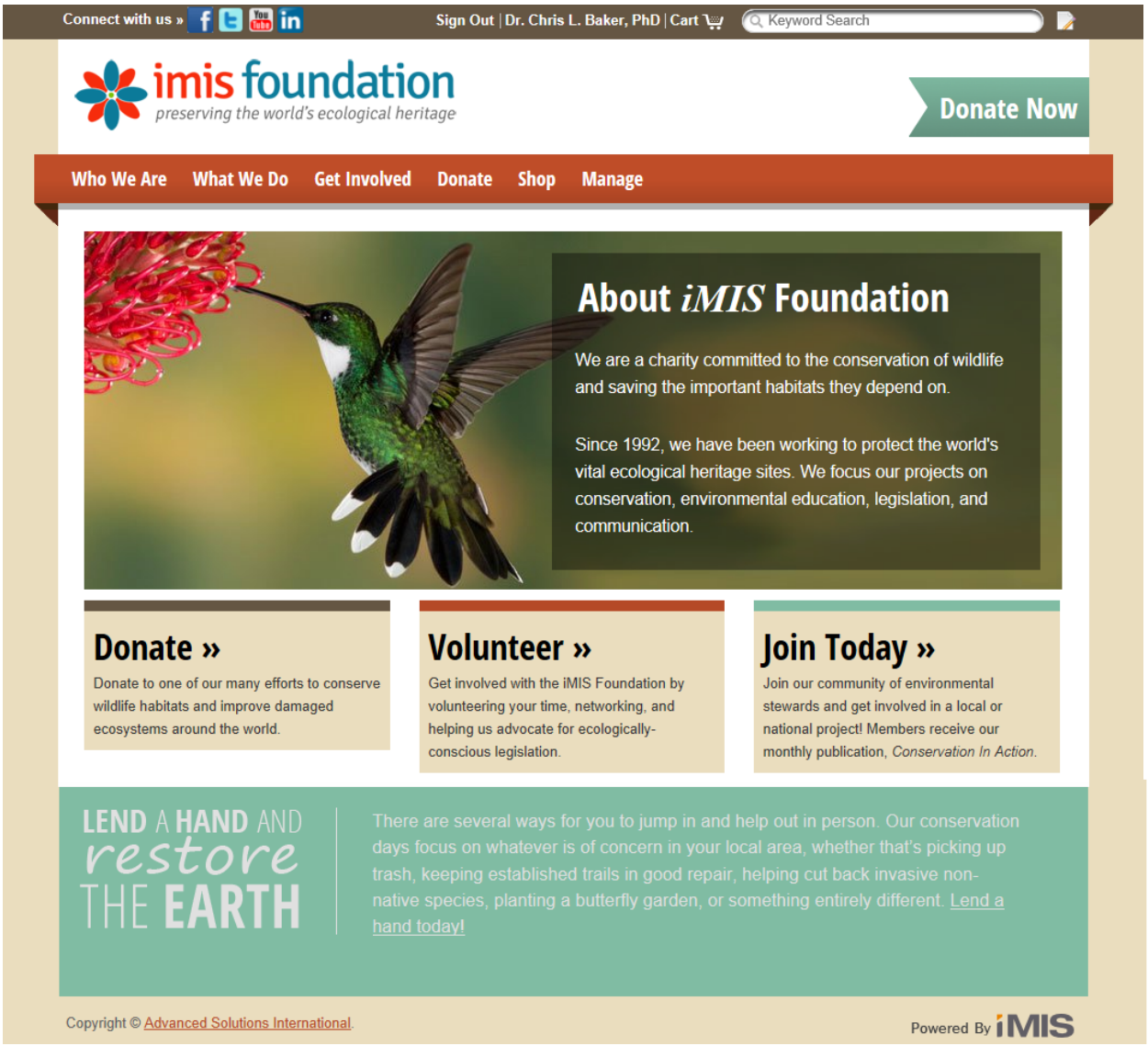
Venus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About iMIS Foundation
We are a charity committed to the conservation of wildlife and saving the important habitats they depend on.
Since 1992, we have been working to protect the world's vital ecological heritage sites. We focus our projects on conservation, environmental education, legislation, and communication.
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There are several ways for you to jump in and help out in person. Our conservation days focus on whatever is of concern in your local area, whether that's picking up trash, keeping established trails in good repair, helping cut back invasive non-native species, planting a butterfly garden, or something entirely different. Lend a hand today!
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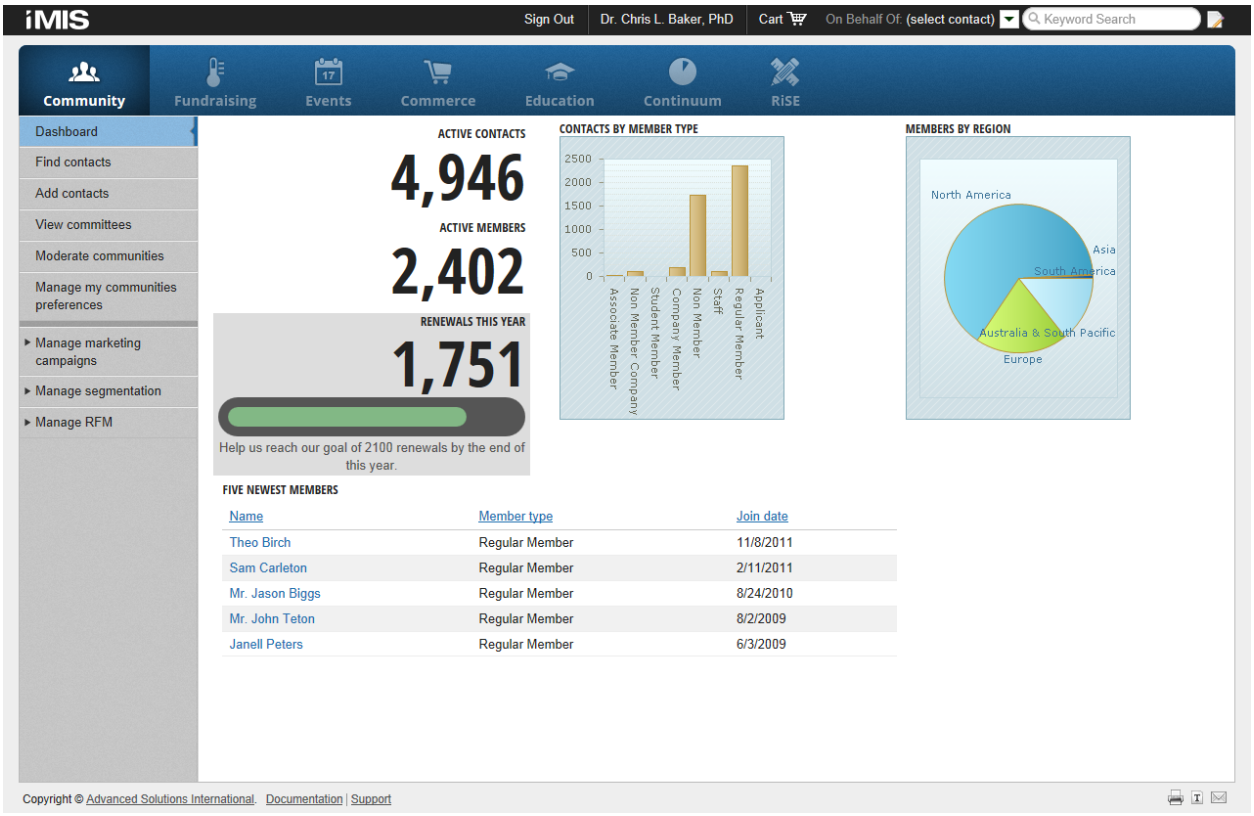
Mars

Mountains.master

The Mountains master page was created specifically for staff functionality. It should not be used with member-facing websites.

Available theme:

Everest



Sapling.master

The Sapling master page was created for mobile devices.

Available themes:

Aspen_Mobile

Upcoming Spring Conference

Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.

Austin_Mobile

AT&T
1:19 PM
iMIS
Cart
Annual Conference
The Annual Conference is fast-approaching. Don't miss out – register today!
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Cairns, Australia
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Creating a site

To create a public-facing website that makes full use of iParts and SOA, it is easiest to copy an existing sample site, such as Member, and change it to meet your needs.

When you copy a website, iMIS duplicates the site navigation and content records for the new site.

Do the following to copy a sample site.

Go to RiSE > Site Designer > Manage websites:

1. Select a website from the list of websites.

- (Properties tab) Make sure the Folder selected for the Website-specific parent content folder field contains the content unique to this website. Only the content in this site-specific folder will be copied. Any content shared with another website should be placed in a separate, shared folder.
- (Look and Feel tab) The Folder containing template content is normally a sub-folder of the parent folder. If the template content (footer area, header logo, etc) is stored in a different folder, be sure to select that folder instead.

2. Select Organize > Copy
3. Select the folder where you want to paste the new website.
4. Select Organize > Paste.
5. Enter the Name of the new website. Do not use special characters or punctuation.

   Note: During Copy, Content Codes clear from content records because this code must be unique for each content record. A warning displays a list of content records where the Content Code was cleared. See log files for details.

6. Copy an out-of-the-box Master Page and Theme to be unique to your new website.

   Note: The themes change and develop with every iMIS update. To avoid losing your changes, be sure to work from a copy of the theme. Creating a copy of a theme also

ensures that you do not compromise your ability to fall back to a working original. Follow these steps to copy a theme, which is far easier than creating one from scratch.

- (Look and Feel tab) Select the Master page and theme that is the best match for the look that you want for your new site.
- Locate the theme folder (such as \Aspen), which defaults to C:\Program Files\ASI\iMIS\Net\App_Themes.
- Copy, paste, and rename \Aspen to your new site name (\ABC).
- Locate the master page (such as Forest.master), which defaults to C:\Program Files\ASI\iMIS\Net\Templates\MasterPages
- Copy, paste, and rename Forest.master to your new site name (ABC.master).

7. Edit your site to use your new theme files.

- Select Site Designer > Manage Websites and highlight your site (ABC).
- Edit the site Look and Feel to point to your new theme files:
- MasterPage/Template: select ABC
- Theme: select ABC
- Select Save.

8. Click the expand icon in the Status area, and enable the Is this website active option.
9. Publish the website:

- Select the newly copied website and select Publish.
- Publish the website's content folders:
- Go to Content Designer > Manage content.
- Select the content folder of the copied website.
- Select Publish. As each folder and content record publishes, the status will change from PublishPending to Published.

- If the website is hosted on a separate web server, publish the Core Content folder. See Installing WCM on web servers for more information on hosting a site on a separate web server.
- Go to Content Designer > Manage content.
- Select the Core Content folder.
- Select Publish menu and choose the Publish All Items option. As each folder and content record publishes, the status will change from PublishPending to Published.

10. After all content folders are published, log off and close the browser.

    Note: If the website you copied contains URL shortcuts, be sure to review those shortcuts in your new website to determine if you need to create fresh shortcuts. For example, when you select the iMIS logo in the Member site, the page redirects to the shared Member Home content record. When you make a copy of the Member site and you select the iMIS logo from the new site, you will be redirected to the same shared Member Home content record. To resolve this, create a fresh shortcut that will point to your new Member Home.

Implementing a mobile site

The Member Mobile sample site is optimal for mobile devices like smart phones and tablets, featuring accessible content and a sitemap for members needing information on the go. The master page Sapling places key information at the top of the screen and works with the Aspen Mobile and Austin Mobile themes; featured styles are sized appropriately for smaller screens.

If you want to provide a mobile site for your members, we recommend that you start with a copy of the Member Mobile sample site, and then apply your changes. When you make a copy of the site, iMIS creates a copy of the website, content, and sitemap.

Note: Before the following required steps, you must complete your copy of the mobile site. See Copying a website.

To implement a mobile site, do the following:

Go to RiSE > Site Designer > Manage sitemaps:

1. Choose your copy of the Member Mobile site.
2. Edit the Full Site navigation item to add your main site's URL to the Content or URL to Link to.
3. Go to RiSE > Content Designer > Manage content, then select the content folder created for your copy of the mobile site.
4. From the ContentAreas folder, edit the following content records:

- Social Networking Images: Configure the Social Networking instance of the Content Html iPart, and from the <>HTML tab, update the href's to link to your social media accounts or remove any links you do not want to appear.
- Header Logo: Configure the Header Logo Span instance of the Content Html iPart and update the logo to your organization's logo.
- Footer Copyright: Configure the Footer Copyright instance of the Content Html iPart, and update the content and link for your organization.

Tips and reminders

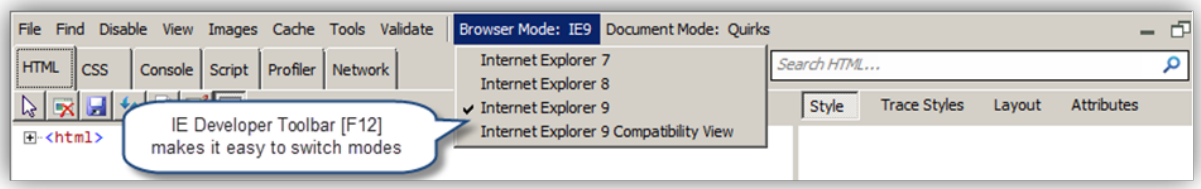
- Trim content – For easier reading on small screens, and to decrease page load time, keep content simple.
- Automatic redirect – Consider adding some JavaScript to redirect users automatically to the mobile site when they try to access your full site on mobile devices.
- Add favicon – Update the favicon used for your mobile site, apple-touch-icon, located by default in C:\Program Files\ASI\iMIS\Net.
- Surf-to-Edit limits – When you access the mobile site, Surf-to-Edit is only available when you access the website from a browser with a width larger than 700 pixels.

Modifying site themes

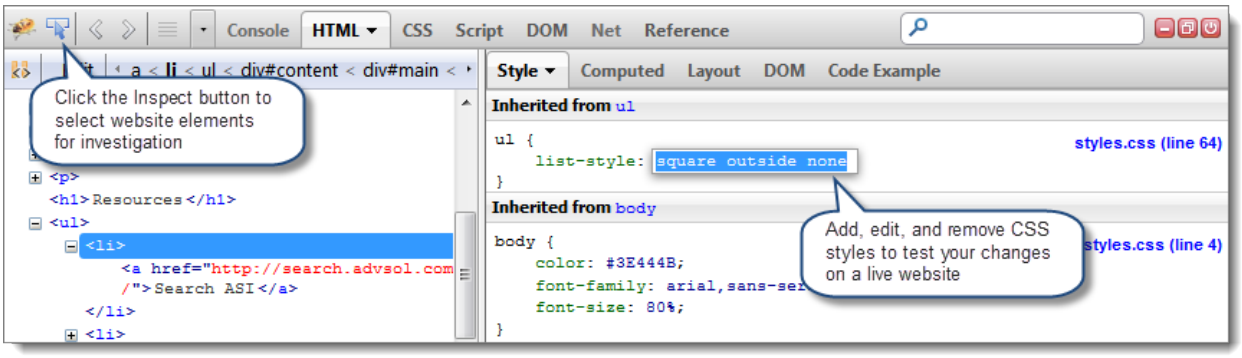
Several themes have been created for the sample sites. You can modify these themes to help identify and personalize your organization's website.

Best practices for theme development

- Caution: Never change the core style sheets 00-Reset.css and 10-UltraWave.css. All derivative themes inherit from these files, and any changes you make to them are lost on upgrade. Instead, override the base styles in your 99-[theme].css.
- Before modifying a theme, find the best one: apply all of the themes to the default Member site in turn, and decide which theme is closest to the final look and layout that you want.
- Always work from your copy of the theme, so that you can begin again. See Copying a website theme.
- Make changes only to websites that you create. When a sample site is updated with each release, the iMIS Upgrader overwrites any changes you made to it.
- Take advantage of browser-based developer tools to test and troubleshoot changes before committing them to your style sheets:
- Internet Explorer and Chrome: Press F12 to toggle the Developer Toolbar.



- FireFox: Install the Firebug add-on to see a wealth of information about the structure of the website and the styles it is using. Turn on the element inspector and click a piece of content to see the styling that it is implementing:



UltraWave and Universal Design

The Sample site themes and master pages build upon a new underlying template called UltraWave. UltraWave incorporates structure and styling for Universal Design. Universal Design seeks to make web content "barrier-free," making sites accessible to all challenged users. Challenged users include not only the millions of physically or cognitively impaired, but also seniors, non-native speakers, and those in other countries and cultures (localization).

Universal Design has benefits beyond helping websites meet the myriad of web accessibility standards: it also aids in breaking technology and human barriers. Universal Design is the foundation for transforming pages and content into outputs and displays your members may need, including print presentation, net book usage, and even cell phone applications.

Important: UltraWave themes support RiSE sites, which are an alternative to Public view. They do not support existing Public views.

Features of the template include:

- Developed toward W3C standards to help meet accessibility requirements
- Fluid-width template dynamically reflows content to fit your user's browser window
- Clean, minimal design uses neutral shades and layout
- Offers a streamlined set of stylesheets and skins

- Easily customized with logos, fonts, and colors
- Designed to be easily rebranded by your organization

Copying a website theme

Themes control the layout, font, and colors of your iMIS sites. The sample sites come with a set of special themes, designed for RiSE sites. See Sample site themes and master pages for a list of available themes.

Creating a copy of a theme also ensures that you do not compromise your ability to fall back to an original that works. Follow these steps to copy a theme, which is far easier than creating one from scratch.

Note: The themes change and develop with every iMIS update. To avoid losing your changes, be sure to work from a copy of the theme, as outlined below.

1. Copy an out-of-the-box theme and master page to be unique to your new site.

- Locate the theme folder (such as \Aspen), which defaults to C:\Program Files\ASI\iMIS\Net\App_Themes.
- Copy, paste, and rename \Aspen to your new site name (\ABC).
- Locate the master page (such as Forest.master), which defaults to C:\Program Files\ASI\iMIS\Net\Templates\MasterPages.
- Copy, paste, and rename Forest.master to your new site name (ABC.master).

Go to RiSE > Site Designer > Manage websites:

2. Edit your site to use your new theme files.

- Highlight your site (ABC).
- Edit the Site Look and Feel to point to your new theme files:
- MasterPage/Template: select ABC
- Theme: select ABC
- Select Save and Publish.

3. Edit your theme files as needed to tailor the design.

Changing theme headers

The first elements to change on your website are the highly visible elements that public visitors see and use in the header: logo, social networking links, welcome banner, and the favicon.

Logo

The header logo is contained in a content record: @\[theme]\ContentAreas\Header Logo. To add your own logo, edit this content record, remove the contents in the HTML iPart, and replace with your own logo.

Note: Alternatively, you can change the logo in the CSS. The logo is set in 99-[theme].css by the selector #masterHeaderImage. Change the background image and the dimensions to match your own logo.

Social networking links

The links to the social networking sites in the top (auxiliary) navigation are also defined in a content record: @\[theme]\ContentAreas\Social Networking Images.

To change the links to navigate to your own social networking pages, edit the content record and change the links on the icons.

In the HTML editor, replace the href on each <a> tag with the appropriate URL. For example:

Favicon

The favicon is the little icon that displays next to the website in your bookmarks and on the browser tab in modern browsers. Changing it to your organizations' icon is simple: create an icon sized either 32x32 or 64x64 pixels and name it Favicon.ico. Then overwrite the original file:

C:\Program Files\ASI\iMIS\Net\Favicon.ico

Update the copyright statement

The copyright statement is contained in a content record within your copied site's ContentAreas folder: Footer Copyright. Edit the Footer Copyright instance of the Content Html iPart on that page to update the copyright.

Changing theme colors

The next step in customizing your theme is to change to colors that support your branding & style. You will make these changes in both CSS and in images.

CSS colors

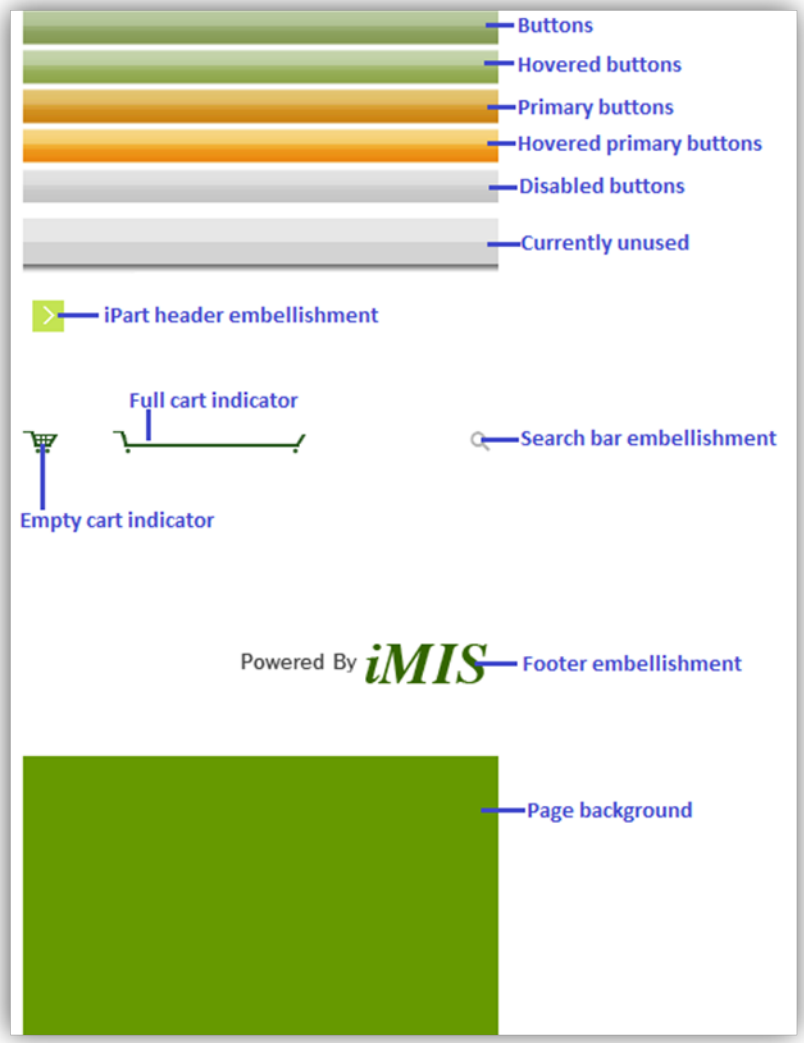
All theme-specific color and styling is located in 99-[theme].css. To find all color references that you might want to change, search the CSS file for these strings:

- color
- border
- background

We also recommend using your browser development tools to help you identify which styles you need to update for your color changes.

Sprite colors

A few of the theme's use sprites to control some of the site colors. A sprite is a single image that combines several commonly used images into one file. CSS then defines which part of the image displays for various purposes. Because your server only has to load a single image instead of several, using sprites reduces load time for your website. To improve performance, the new sample sites use sprites when possible. The image below shows a sprite used in the theme Aspen, and labels where each image is used:



You can either edit the sprite we have provided (which is easier), or create your own.

- When editing the provided sprite, keep all elements in their original pixel coordinates, so that you do not have to edit the related CSS.
- The .png version of the sprite is located in images/[theme]_sprite.png. You can edit this image in your favorite image editor, but we do not recommend editing in MS Paint, as you will lose the background transparency.
- Your theme's \Resource folder also includes a .psd source file of each sprite. You can edit the .psd with Photoshop or GIMP, a free image editor that can edit and save images in .psd and web-safe formats.

- If you edit the .psd, save your new image as a .png, and place it in the images folder of your theme.

  For greater design control, you also have the option of creating your own sprite. If you choose that option, you may also need to update your theme CSS for the new coordinates of the sprite. To help you with this process, we recommend the following resources:

- CSS Sprites: What They Are, Why They're Cool, and How To Use Them
- Sprite Cow calculates the pixel positions of the various images inside your sprite.
- CSS Sprite Generator lets you upload a zip file of images and get back a sprite file with the corresponding CSS.

Changing theme home pages

The Member site uses a pair of home pages: one that appears to guests (unauthenticated view) and another that appears to those who have signed in (authenticated view). You can change one or both of them, or drop one entirely and have one home page appear to all.

Do the following to change the unauthenticated home page:

Go to RiSE > Content Designer > Manage content:

Note: To have your own home page behave like the default one (switch to the authenticated home page when the user signs in), you need to add the code-bearing HTML iPart that does so.

1. Create a new content record for your unauthenticated home page.
2. Copy the AuthScript code to your new home page:

- Edit the unauthenticated home page content record @\iSamples\Member\Home.
- Locate the HTML iPart named AuthScript.
- Select Move To and select your unauthenticated home page.

- Now edit your unauthenticated home page and move the AuthScript iPart to the top of the content record.
- Save and Publish your home page.

3. Make your site's home page link to your new home page.

- Go to Site Designer > Manage sitemaps.
- Select your website.
- Edit the default navigation item (flagged with ★) and select your new home page for Content or URL to Link to.
- Save and Publish your sitemap.

Do the following to change the authenticated page:

Go to RiSE > Content Designer > Manage content:

Note: To have your own authenticated home page appear as soon as the user signs in, you need to edit the code-bearing HTML iPart that calls it.

1. Edit your unauthenticated home page content record.
2. Locate the HTML iPart named AuthScript.
3. Select Configure and switch the editor's view from Design to HTML, to view the code.
4. Edit the path to be the published path of your new authenticated home page:

path = "~/Mbr/Home/[theme]/MemberHome.aspx";

Do the following to use only one home page.

You can drop to a single home page either by:

- Removing the script that opens the authenticated home page:
- Go to Content Designer > Manage content and Edit the unauthenticated home page @\[site]\Home and delete the HTML iPart named AuthScript.
- Substituting your own page entirely:

- Go to Site Designer > Manage sitemaps and set your desired content record to be the default home page of your website.

Changing Telerik skins

Several iParts throughout the product use Rad Controls developed by Telerik. These controls require a few steps to style, and Telerik resources can help you get started:

- Telerik Control Guide – an overview of Telerik controls, including available skins.
- Telerik Visual Style Builder – generates CSS and some images for skinning Telerik controls.

Every [theme].skin file lists all of the Telerik skins that it uses to style controls. If a control does not explicitly define a theme, then it uses the Default Telerik skin.

Rad Window control

This control is the pop-up window that we see in many iParts. Its skin is set by two lines in Aspen.skin:

<asiweb:Window runat="server" Skin="Forest" />

<asiweb:WindowManager runat="server" Skin="Forest" />

Forest is a skin designed by Telerik and is available on most Telerik controls, along with a handful of other Skins. You can preview available Telerik skins for this control.

Tip: Telerik skins are easy to switch out and virtually maintenance-free. However, they are difficult to customize, so avoid this route unless you can use the skins as-is.

Rad Tab Strip

This control is used by the Content Collection Organizer (CCO) iPart, the Contact Address Editor iPart, and most other places where you see a tab strip. This line defines the skin:

<telerik:RadTabStrip runat="server" Skin="Aspen" EnableEmbeddedSkins="false" />

The definition for this look and feel is near the bottom of the 99-[theme].css, under the heading RadTools Styles.

Rad Menu control

This control displays the primary navigation area. There is wrapper for this control called PageNavR, so this line defines the skin:

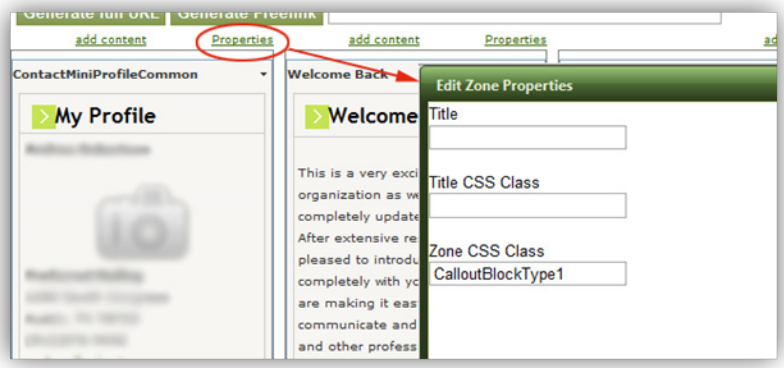
<asi:PageNavR runat="server" Skin="Aspen" EnableEmbeddedSkins="false" … />

The styling for the Rad Menu is located in Menu.[theme].css, and the image sprite is under [theme]\Menu\rmSprite.png. The easiest way to customize this control is to use Telerik's Visual Style Builder. (Tip: This tool works best in Internet Explorer.)

Changing zone properties

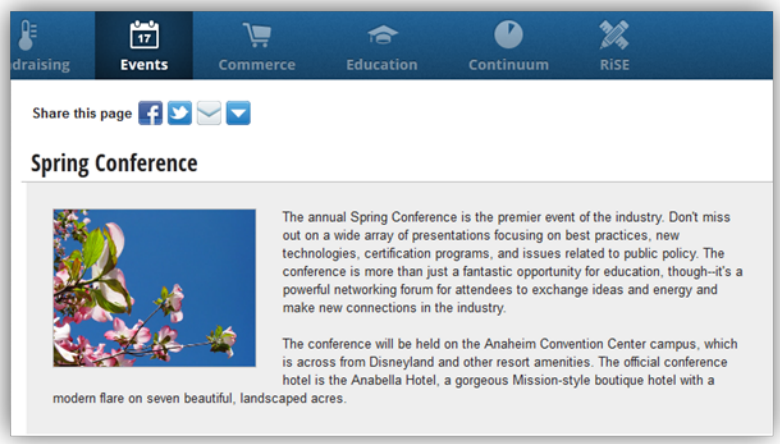
Zone properties make it easy to apply unique styling to specific iParts, for emphasis and contrast.

To apply a style to an iPart's zone property, edit the content record, click Properties, and enter the name of the class in Zone CSS Class:

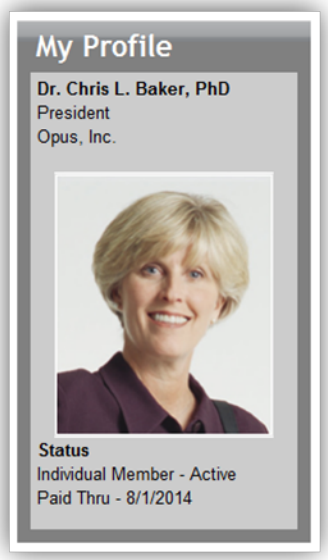


You can add more if needed, but all tree-name themes contain the following three zone style classes:

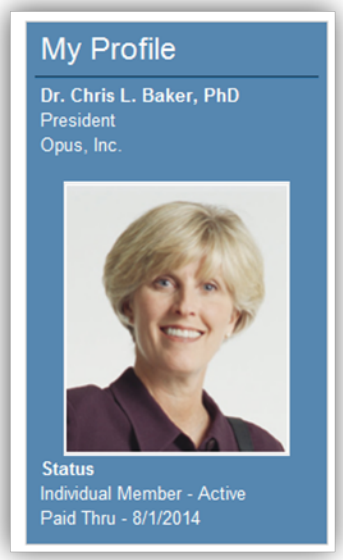
- TitleBarNoBorder – simply removes the bottom border from iPart headers
- CCOGrayBg – applies a gray background to content appearing in CCO tabs



- CalloutBlockType1 – accentuates an iPart whose border is enabled



Aspen:



Birch:

Creating a new theme

Instead of editing a copy of Aspen or Birch, you can also start from scratch when designing your own theme. However, you must include the 00-Reset.css and10-UltraWave.css in your new theme. To do so, begin your new style sheet with these lines:

```
/*##########################################*/
/*     Import UltraWave StyleSheets      */
/*##########################################*/
```

@import url("../UltraWave/00-Reset.css");

@import url("../UltraWave/10-UltraWave.css");

Resources for CSS

- w3schools.com – a great resource for CSS and HTML information and examples.
- CSS3 Generator – a tool to help generate CSS for rounded corners, box shadows, background gradients, and opacity. (Note: CSS3 is not fully supported in all browsers.)

Designing site navigation

Displaying left navigation

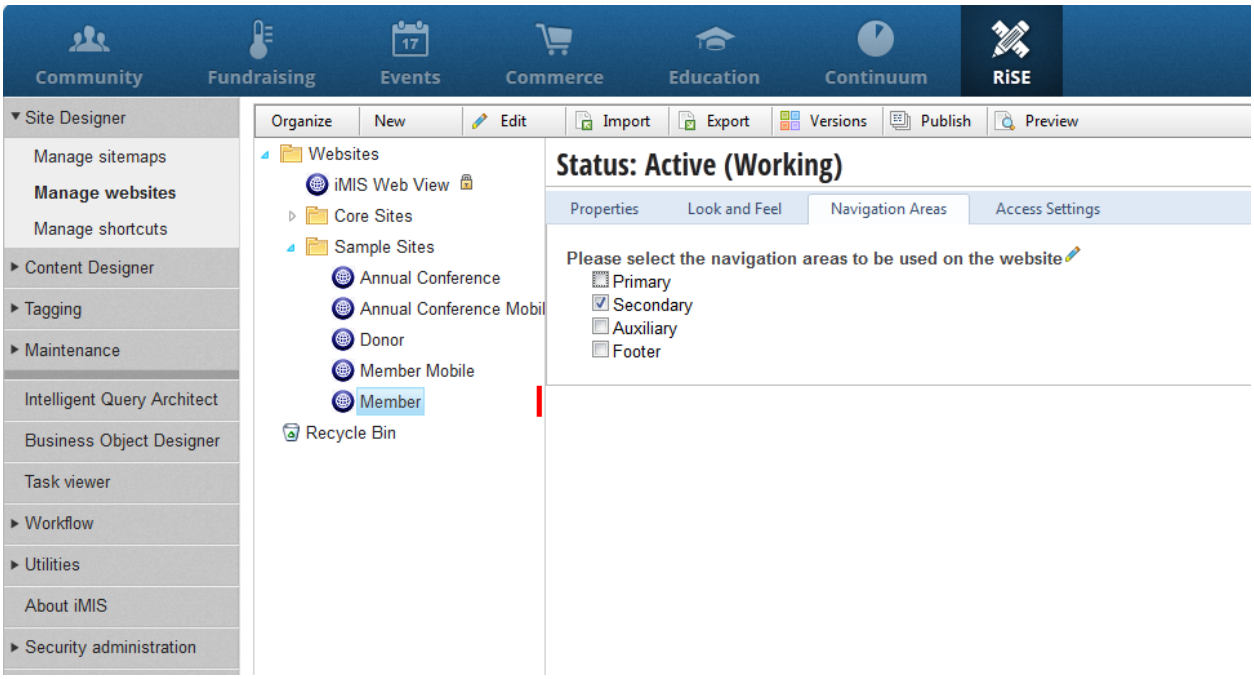
You can display website left navigation in a hierarchical format with a few changes to your theme's master page and skin file.

Do the following to implement left navigation:

Go to RiSE > Site Designer > Manage websites:

1. Define how many levels of navigation to display.

- Select the website.
- Select the Navigation Areas tab and select the Secondary navigation area.
- Save and publish your changes.



2. Edit the website theme's master page.

- Using your preferred text editor, find and open the website theme's master page. Master pages, by default, are located in C:\Program Files\ASI\iMIS\Net\Templates\MasterPages.
- Register the control by adding the following line to the top of the master page, just below the other registered controls:

  <%@ Register TagPrefix="asi" TagName="SubNavigation" Src-c="~/AsiCommon/Controls/Navigation/SubNavigation.ascx" %>
- Add the following scripts to the <script language="C#" runat="server"> section:

  protected override SiteMapNode GetStartingNode()

  {

  return Secondary.GetStartingNode();

  }

  protected override SiteMapNode GetCurrentNode()

  {

```
    return Secondary.GetCurrentNode();
}
```

- Find the masterSideBarPanel div. It should look like this:

```
<div id="masterSideBarPanel" class="yui-b">
    <asp:ContentPlaceHolder ID="SideBarPlaceHolder" runat="server">
      </asp:ContentPlaceHolder>
</div>
```

- Update the masterSideBarPanel div so that it contains the following:

```
<div id="masterSideBarPanel" class="yui-b">


     <asp:Panel ID="SubNavPanel" runat="server" >
         <asp:ContentPlaceHolder ID="PageSubNavigationPlaceHolder" runat="server">
         <asp:Panel id="SubNavHead" runat="server" class="SubNavigationHead">
         <asp:Literal ID="SubNavPanelTitle" runat="server" />
         </asp:Panel>
         <asp:Panel id="SubNavBody" runat="server" class="SubNavigationBody">
         <asi:SubNavigation id="Secondary" runat="server" NavigationPaneCode="2"
           StartingNodeOffset="1" StartFromCurrentNode="true"
           StartingNodeOffsetAutoSet="true" SelectDefaultNode="false" />
          </asp:Panel>
          </asp:ContentPlaceHolder>
        <asp:ContentPlaceHolder ID="SideBarPlaceHolder" runat="server" />
    </asp:Panel>
```

```
</div>
```

- Find the masterWrapper div, and add the yui-t2 class to it:

```
<div id="masterWrapper" class="yui-t2">
```

- To improve JavaScript performance for websites using hierarchical sub-navigation, find the following script:

```
<script type="text/javascript">
    // if there is something in the side bar this converts the layout to 2 columns
    if ($('masterSideBarPanel').children.length != 0) {
      $('masterWrapper').setAttribute("class", "yui-t2 HasSubNav");
    }
</script>
```

- Update that script to the following:

```
<script type="text/javascript">
    // if there is something in the side bar this converts the layout to 2 columns
    if ($('masterSideBarPanel').children.length === 0) {
      $('masterWrapper').removeAttribute("class");
    }
</script>
```

3. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.

- Register the control by adding the following line to the top of the skin file, just below the other registered controls:

  <%@ Register TagPrefix="asi" TagName="SubNavigation" Src-c="~/AsiCommon/Controls/Navigation/SubNavigation.ascx" %>

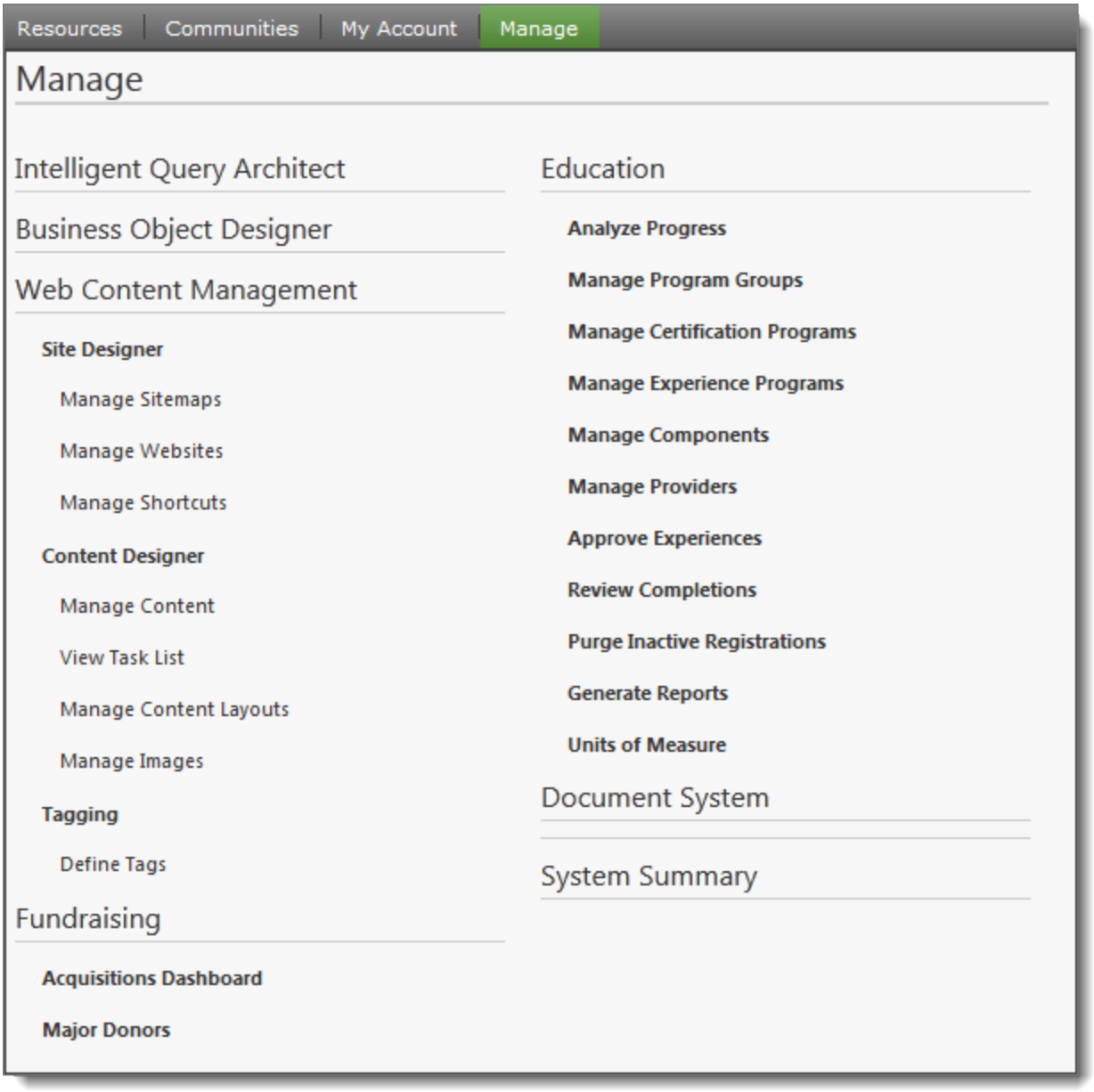
- Just below the section registering controls, add the following line:

  <asi:SubNavigation runat="server" Skin="Aspen" EnableEmbeddedSkins="false" SingleExpandPath="true" ShowLineImages="false" />

- (optional) If you are familiar with skin controls, you can configure how the SubNavigation control behaves using the following properties:
- string NavTreeSkinId – A unique ID for the skin if needed. The default is RadTreeView.
- bool SingleExpandPath – Gets or sets a value indicating if only the current branch of the tree is expanded. The SingleExpandPath property, when set to True, automatically collapses nodes that are not on the path of the currently expanded node. Use the SingleExpandPath property when you need to conserve screen space and make navigating nodes easier.
- public bool ShowLineImages – Gets or sets a value indicating if the tree node line images display or not.
- string Width – Gets or sets width of the control. Specify in pixels (px) or percentage (%) e.g. 500px, 90%.
- bool EnableEmbeddedSkins – Gets or sets a value indicating if the built in skins should be used on the navigation tree.
- int MaxDataBindDepth – Gets or sets the maximum number of levels to bind to the navigation tree.
- bool WrapNodeText – Gets or sets the option to wrap text if it is wider than the trees allowed width.
- bool ExpandAllNodes – Gets or sets the option to expand all of the nodes when the navigation tree renders.

Displaying mega drop-downs

You can display mega drop-downs from your primary navigation with a few changes to your theme's skin file and menu CSS. Mega drop-downs display navigation items within large panels, grouped by level, which reduces scrolling and improves the usability of site navigation.



To implement mega drop-downs

1. Ensure that all navigation items in the sitemap have a value for Content or URL to Link to. Otherwise, the navigation hierarchy may not render properly.
2. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the pageNavR control and update it to add the following property:

  EnableMegaDropDownMenu="true"

- (optional) If you are familiar with skin controls, you can configure how the mega drop-down behaves by altering the following properties:
- EnableMegaDropDownMenu – Enables the mega drop down.
- MegaDropDownMenuShowStartingNode – Displays the parent navigation node as the first item in the mega drop down. Enter true or false.
- MegaDropDownMenuLevelSettingLevel – Defines the navigation level at which the number of columns set for MegaDropDownMenuRepeatColumns starts to take effect. For example, if you set MegaDropDownMenuRepeatColumns="3" and set MegaDropDownMenuLevelSettingLevel="2", then the mega dropdown displays three columns for the second and higher navigation levels, and the first level only has one column.
- MegaDropDownMenuRepeatColumns – Defines the number of columns used to display the navigation.
- MegaDropDownTooltipLocation – This option only applies to tooltips defined for top level navigation items in the primary navigation. When defined, it specifies the location of the tooltip text if a tooltip is defined for that navigation item. Enter either Menu (displays the tooltip directly beneath the top level navigation item) or Append (displays to the right of the navigation text within the dropdown). If you do not define this property, navigation tooltips are not displayed in the dropdown.

3. Edit the theme's menu CSS to tailor the display of the mega drop-down for the theme's look and feel.

- Using your preferred text editor, find and open the website theme's menu CSS file (for example Menu.Aspen.css). Menu CSS files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the MegaDropDownMenu Styling section and edit the styles as needed:

```
/* ############################ */
/*  MegaDropDownMenu Styling  */
/* ############################ */

.RadMenu .rmGroup .MegaDropDownMenuOuter .rmText {
   padding: 0;
   margin: 0;
   width: 600px !important;
}

div.MegaDropDownMenu
{
   background-color: #f8f7f7;
   padding-left: 5px !important;
   padding-right: 5px !important;
}

.MegaDropDownMenuToolTip
```

```
{
   padding: 5px;
}
```

Using image sprites for navigation items

A sprite is a collection of images combined into a single image. Using CSS, you can shift the image around to display only parts of it. The advantage of using sprites is that they reduce the number of server requests to load images (only one is loaded), leading to improved performance.

One way to use sprites in iMIS is for rollover effects on navigation items.

To implement image sprites for navigation items

1. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the pageNavR control and update it to add the following property:

  EnableImageSprites="true"

  When enabled, a new class named rmLeftImage is added to root level links in PageNavR.

2. Create the sprite file.

- Using an image editor like Adobe Photoshop, or a free alternative like GIMP, create your sprite by adding the images you want to a single image, like the following:

- Save the sprite to the website theme's image folder.

3. Edit the theme's 99-[theme].css file to define the classes to control the sprite.

- Use a tool like SpriteCow to determine the position values of the images in the sprite.
- Using your preferred text editor, find and open the website theme's 99-[theme].css file, located by default in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Add styles for the sprite. For example:

```
.RadMenu a.rmRootLink.CartLink .rmLeftImage
{
   Background-image: url(images/cartsprite.png);
   Background-repeat: no-repeat;
   Background-position: -1px -1px;
   Width: 48px;
   Height: 36px;
}
.RadMenu a.rmRootLink.CartLink:hover .rmLeftImage, .RadMenu a.rmRootLink.CartLink.rmExapnded .rmLeftImage, .RadMenu a.rmRootLink.CartLink.rmFocused .rmLeftImage
{
   Background-position: -1px -39px;
}
```

The first group of selectors sets the resting position for the image sprite. The second group of selectors defines the hover state and shifts the image when the link is rolled over.

Go to RiSE > Site Designer > Mange websites:

4. Apply the sprite class to the appropriate navigation items.

- Edit the navigation item for which you want to apply the sprite hover effect (for example, the Shop).
- For the CSS Class property, enter the sprite class (for example, CartLink).
- Save and Publish the navigation items.

Styling your website's primary navigation

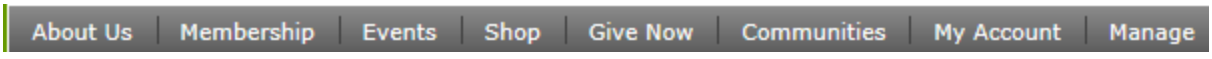
If you customize your website with a new look and feel, you will want to restyle the primary navigation to match the rest of the site. To customize the look of the navigation, you must be using iMIS 15.2 or later along with an UltraWave-derivative theme such as Aspen, Austin, or Birch. In iMIS, the primary navigation bar is built with Telerik RadControls; providing powerful tools for creating dynamic menu systems.

You can change your navigation menu's style by:

- Choosing an out-of-the-box skin provided by Telerik
- Customizing the font or color of an existing Telerik skin using Telerik's Visual Style Builder
- Styling your menu with CSS instead of using the Telerik tools

What is PageNavR?

PageNavR is a control that iMIS uses to display a website's primary navigation. The navigation bar automatically populates with each top-level navigation item, and each sub-item displays in a drop-down list that can expand to multiple levels. PageNavR wraps around a Telerik RadMenu control, so all PageNavR styles are controlled by Telerik's base styles.



What is a .skin file?

Skin files allow you to override default control behaviors in a theme-dependent way. If you set a property for a control in one theme's skin file, it will not affect how the control displays in other theme's skin files.

Take a look at this section of the Aspen.skin file in App_Themes/Aspen:

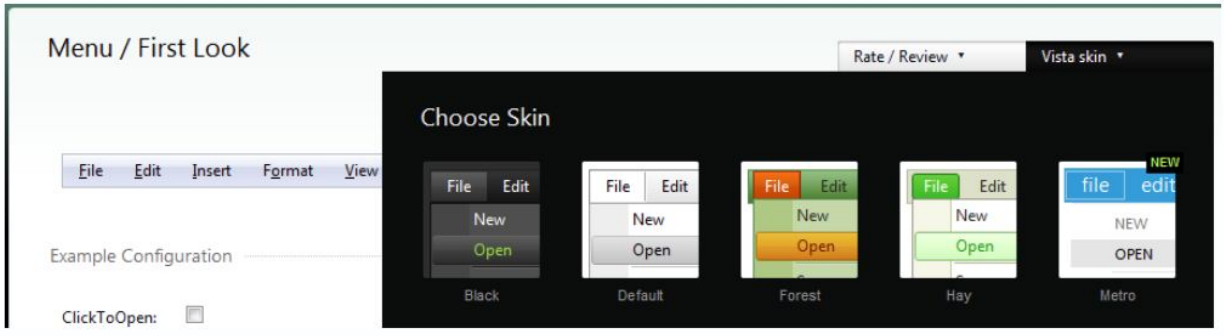
<asi:PageNavR runat="server" Skin="Aspen" EnableEmbeddedSkins="false" EnableRootItemScroll="false" Flow="Horizontal" DefaultGroupSettings_Flow-w="Vertical" DefaultGroupSettings_OffsetX="0" Width="100%"/>

These are just a few of the PageNavR properties available for the control in the skin file. The two properties which affect the navigation bar's style are "Skin" and "EnableEmbeddedSkins."

The "EnableEmbeddedSkins" property determines whether Telerik embedded skins should be loaded as the default. If you are creating your own custom skin, you MUST set this property to "false."

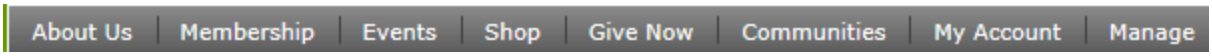
To style the navigation using a skin provided by Telerik

1. Choose an existing Telerik skin to style the navigation menu at [Telerik RadMenu Demo: First Look](#).



2. Change the "Skin" property of the PageNavR control in the theme's skin file to the name of the skin you selected.

3. Change the “ EnableEmbeddedSkins=" property of the PageNavR control to “true." The navigation bar’s styling will change to that of the Telerik skin you selected.

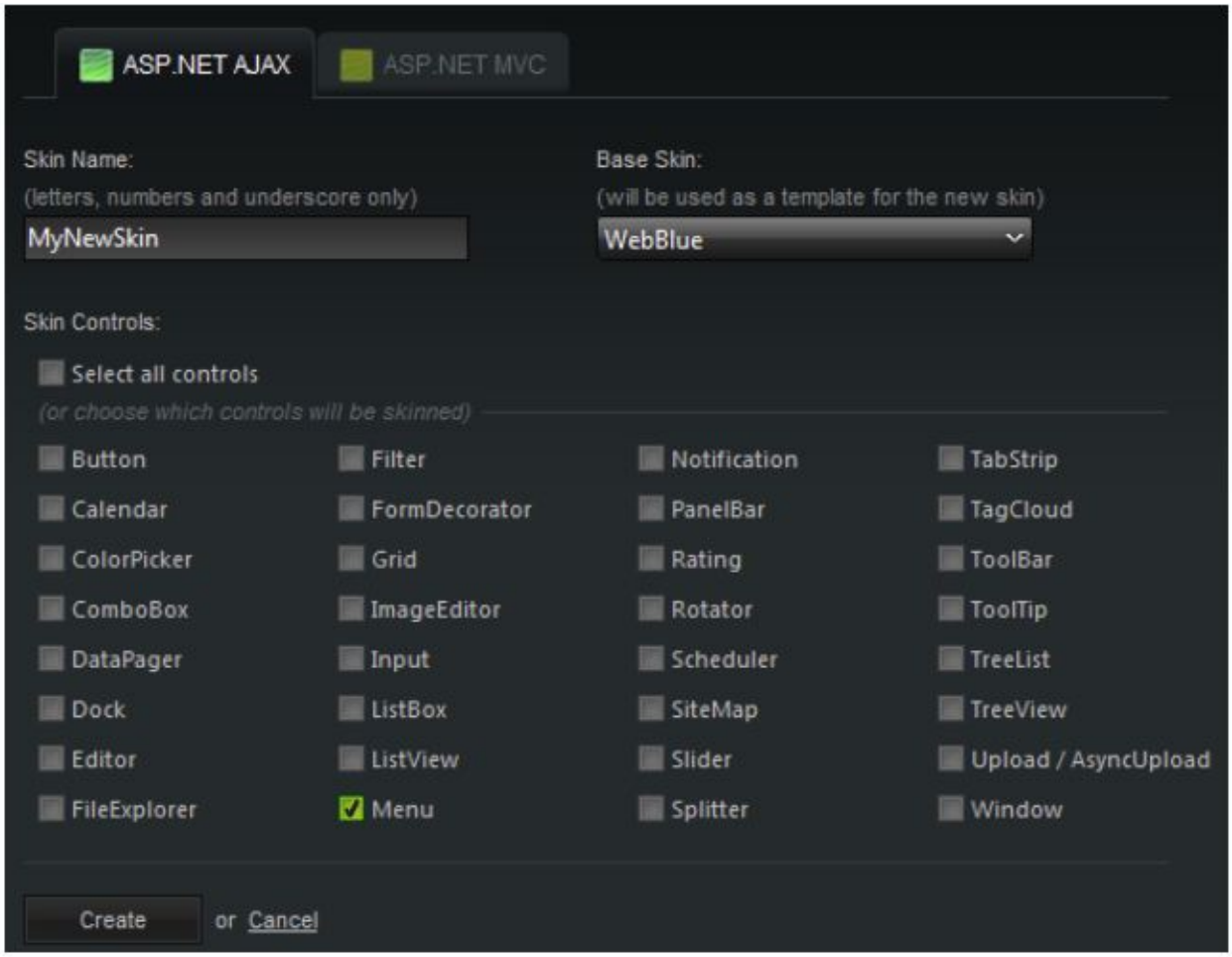


For more information, see MSDN's guide to ASP.NET Themes and Skins.

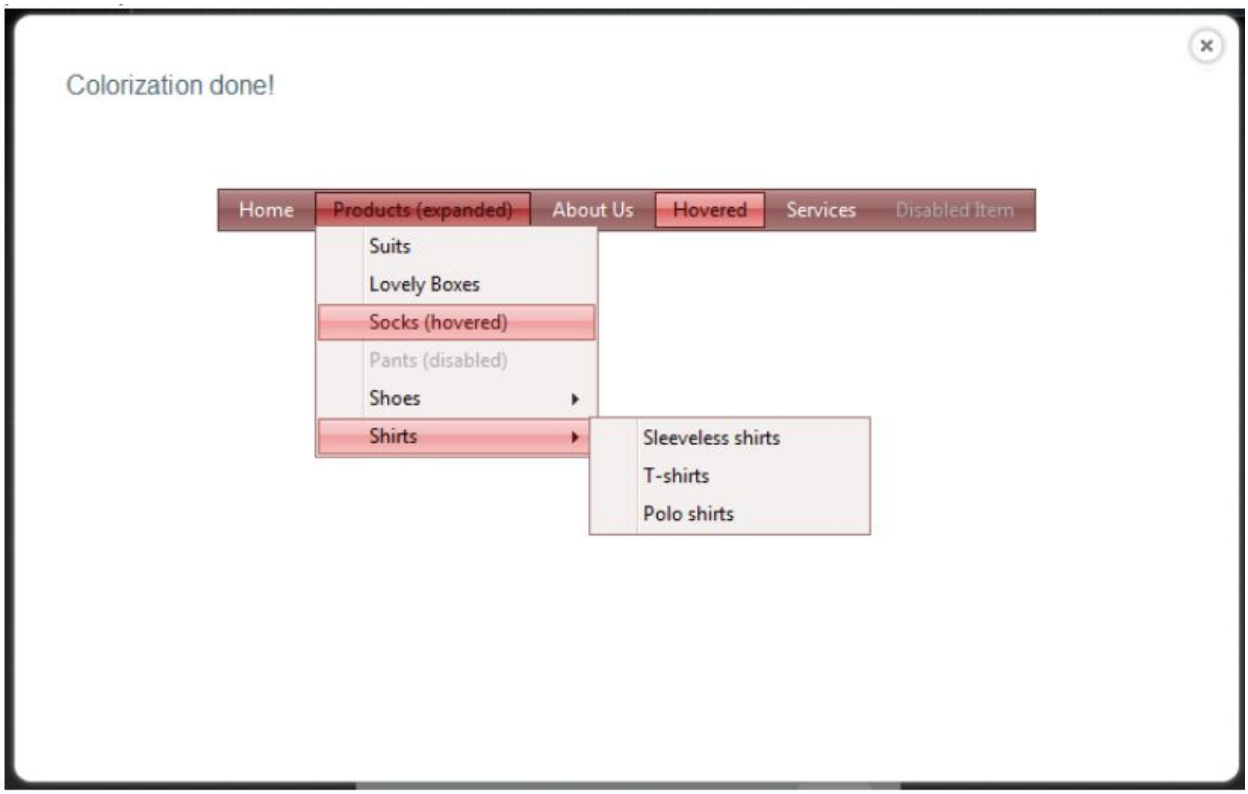
To style the navigation by customizing an existing Telerik skin using Visual Style Builder

If you want to customize the colors or font for a particular Telerik skin, you can use Telerik's Visual Style Builder:

1. Open the Telerik Visual Style Builder and select New Skin. (Note: The Visual Style Builder is in beta. For best results, use Internet Explorer as it is not fully functional in any other browser.)
2. Name your new skin, select your base skin, and check the Menu checkbox.
3. Click Create. Visual Style Builder will open on the Colorize tab.



4. Select your preferred color for the menu. You can fine-tune the hue and saturation of the color on the Shift colors tab in the color window that is open.
5. Click Save to see a preview of your new skin. If you are satisfied with the outcome, you can now download the generated images and CSS and skip to step 9.

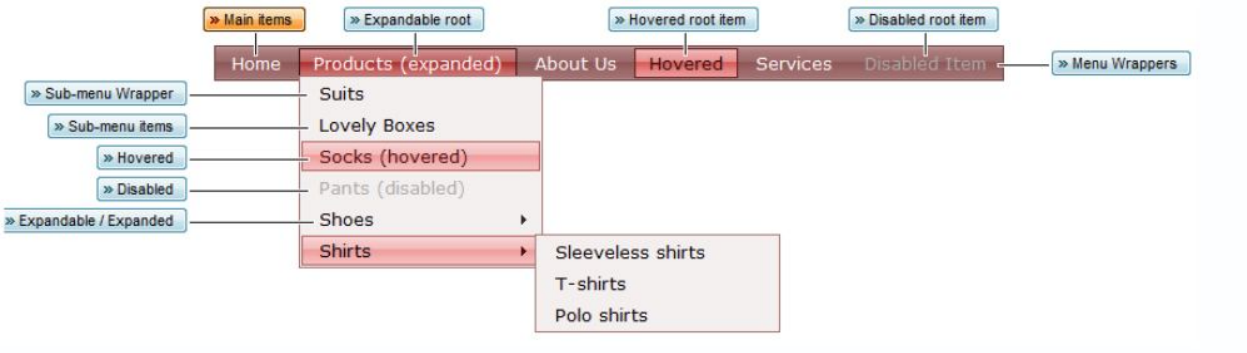


6. For additional customizing, click the Fine-tune tab of the Style Builder itself in the top left.

   Tip: The fine-tune functionality can be unpredictable. Save frequently so that if you don't like the way a change turns out, you can click "load last save" to undo it.

7. Begin with any universal changes you would like to make, such as changing the font on the navigation nodes. Click the Main items bubble to make changes to the font on the main navigation node.

   Each time you make a change the example dynamically responds. Each of the blue bubbles opens a different set of configuration options.



8. When you are finished, click Save and then Download to get the necessary code and images.
9. Copy the unzipped files to your theme's folder. Open the .skin file and set “EnableEmbed-dedSkins” to “false” and “Skin” to the name of your new skin.

   For more information and a video tutorial, see Telerik's Visual Style Builder Overview.

   To style the navigation using CSS

   If you do not like the Telerik provided skins, you can create, with the aid of your browser’s developer tool, your own image-free styling using CSS. If you choose to work by hand, you may find it helpful to start with a working skin, and adjusting to suit your needs.

1. Rename all of the base-level selectors in your working skin file to RadMenu_[Your theme name] .
2. Use your browser’s developer tools to help you figure out how to modify the CSS to get the desired result.
3. In your theme's skin file set “EnableEmbeddedSkins” to "false" and “Skin” to the name of your skin.

   Helpful Links

   Here are some links that may be helpful to you while theming your website:

- w3schools.com: CSS Tutorial
- Creating a unique homepage with CSS and Javascript - includes a very helpful video if you're unfamiliar with browser developer tools
- ASP.NET Themes and Skins
- Telerik RadControl Demos - RadMenu
- Telerik Visual Style Builder
- Telerik Visual Style Builder Overview

Controlling sitemap behavior

This section explains sitemap behavior, including:

content records, iParts, and shortcuts used for searching.

- How to modify the [OverrideLinkText] and [CartItemCount] dynamic navigation items
- Profile pages linked from the Member site's Directory, which uses an ASPX web page to redirect users to a navigation item based on a set of criteria

How search works with navigation

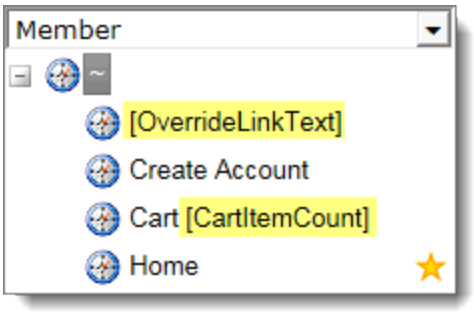
Three elements make search work in the sample sites:

- The search content records: The sample sites use search content records that are dynamically populated with an initial search result set based on a URL parameter value. These content records contain the Common Search iPart and are located within @/iCore folders.
- The pages that display the initial search results: The Shop and Events navigation items are linked to the Search content records. These navigation items have a unique value for the InitialArea URL parameter, which defines the result set generated when the pages are first displayed (i.e. products or events).
- The page displayed when a user clicks a result: The page displayed when a user clicks a search result link are based on the shortcuts defined from Site Designer > Manage shortcuts. The following shortcuts display search result links in the sample sites:

- ItemDetail –The ItemDetail shortcut displays the Item_Detail content record, which uses the Product Display iPart to display the item selected.
- GiftDetail – The GiftDetail shortcut displays the Gift_Detail content record, which uses the Donation Creator iPart to display donation pages selected from search results.
- EventDetail – The EventDetail shortcut displays the Event_Display content record, which uses the Event Display and Event Program Display iParts to display event pages selected from search results.

Modifying dynamic nav items

The default sitemaps include variables that dynamically generate the text displayed for two navigation items. [OverrideLinkText] displays the Full Name of the logged in user by default. [CartItemCount] displays the number of items a user has added to the Cart.



If you want to add new navigation items that use these variables, or if you want to modify the existing ones, keep the following guidelines in mind:

- Navigation areas and master pages – The variables only work in the Auxiliary and Footer navigation areas of websites using one of the Sample Site master pages (or copies of these files) or 1700.master. To specify a navigation area, edit a navigation item and in the Options section, select Auxiliary, Footer, or both from the Show in the following navigation areas options.
- [OverrideLinkText] – You can use this variable on its own or with other text. For example, if you only enter the variable, then only the logged in user's name is displayeds as a link. However, if you enter [OverrideLinkText]'s Profile, and Bob Smith logs in, then Bob Smith's Profile is displayed as a link.

- [CartItemCount] – You can use this variable on its own or with other text, but we recommend that you only use it with other text. Otherwise, when no items are in the cart, nothing is displayed for this navigation item.

  To change the data displayed for [OverrideLinkText]

  The variable [OverrideLinkText] can display any property of the NetContact business object. You can change the property displayed by editing the ContactDetail property in your copy of one of the Sample Site themes, or in 1700.master.

  For example, instead of displaying the Full Name of the logged in user, you may want to display only their First Name. To make this change, edit the ContactDetail property to replace all instances of FullName with FirstName. The result should look like this:

```
public string ContactDetail
  {
    get
    {
      if (ViewState["ContactDetail"] != null)
        return (string)ViewState["ContactDetail"];
      _contact = Asi.Business.Contact.ContactController.Contact(Asi.AppContext.CurrentIdentity.UserKey,
                                                  Asi.AppContext.CurrentContext.
                                                    StatefulBusinessContainer);
      return _contact.FirstName != "GUEST" ? _contact.FirstName : String.Empty;
    }
    set { ViewState["ContactDetail"] = value; }
  }
```

Account and profile pages in the Directory

When users select a result after searching the Member site's Directory, or when they navigate to the account pages, the content record that displays depends on the user's permissions. The rules that determine where a user is redirected are defined in the Party.aspx file, located by default in C:\Program Files\ASI\iMIS\Net.

You can modify the information displayed on the account and profile pages by editing the content records described below from Content Designer > Manage content.

Note: In the Member Mobile site, only simple profile pages are shown for member and organization accounts to restrict the amount of information displayed on small screens.

Page description	Users directed to the page	Content record: @/iCore/Contacts/*	Shortcut
Detailed page for staff to manage member accounts	System Administrators Staff with an authorization level of 1 or higher in Customers	ContactLayouts/Account_Page_Staff	FullAccount
Detailed page for member to manage own account	Contacts selecting their own record	ContactLayouts/AccountPage	MyAccount
Detailed Organization account page	System Administrators Staff Organizations selecting their own record	OrganizationLayouts/Account_Page	OrganizationAccount

Simple (non-editable) Contact profile page	Users who do not have permission to edit the account	ContactLayouts/Profile	Profile
Simple (non-editable) Organization profile page	Users who do not have permission to edit the account	OrganizationLayouts/Organization_Profile	Organization

Complying with the EU's Electronic Privacy Directive

To comply with the EU Directive on Privacy and Electronic Communications, iMIS has added support for your organization to display a pop-up notification informing visitors that cookies are used on your site. This popup also includes a link to a longer sample privacy policy we have provided. You can find more information about this law on the ICO website.

Setting up cookie notifications requires that you edit your master page, review (and modify as needed) the privacy policy provided, and add a JavaScript file to iMIS.

To display cookie notification popups

1. Edit the master page of your website (by default located in C:\Program Files\ASI\iMIS\Net\Templates\MasterPages) to add the following items:

- Just under the , add the following divs:

Note: You can edit this content to change the look and feel of the popup to match the design of your site.

```
<div id="EUCookiewarningBack" style='z-index:999; position:absolute; width:100%;height:100%;background: rgb(0, 0, 0) transparent;background: rgba(0, 0, 0, 0.6);filter:progid:DXImageTransform.Microsoft.gradient(startColorstr=#99000000, endColorstr=#99000000);-ms-filter: \"progid:DXImageTransform.Microsoft.gradient (startColorstr=#99000000, endColorstr=#99000000)\"'>

<div id="EUCookiewarning" style-='margin:19%;padding:10px;width:62%;height:20%;background:white;color:black'>

<span id="EUCookiewarningtext"></span>

<a href="#" class="close-notify">Continue</a>

</div>

</div>

</div>
```

- At the bottom of the master page, just before the line <!-- Facebook API is loaded into here -->, add the following JavaScript reference:

```
<script type="text/javascript" src="AsiCommon/Scripts/EUCookieWarning.js"></script>
```

2. Review the sample privacy policy provided as a content record in iSamples/Member/Privacy_Policy, and update as needed for your organization.
3. Create a JavaScript file named EUCookieWarning.js containing the code below, and add it to the Scripts folder (by default located in C:\Program Files\ASI\iMIS\Net\AsiCommon\Scripts).

   Note: The displayNotification function in this file contains the content of the popup notification displayed to users the first time they visit a page in your website. Be sure to update the privacy policy link in this message to point to the content record you want to display for this purpose. You can also edit the rest of the content for the needs of your organization.

```
function getCookie(c_name)
{
var i,x,y,ARRcookies=document.cookie.split(";");
for (i=0;i<ARRcookies.length;i++)
 {
 x=ARRcookies[i].substr(0,ARRcookies[i].indexOf("="));
 y=ARRcookies[i].substr(ARRcookies[i].indexOf("=")+1);
 x=x.replace(/^\s+|\s+$/g,"");
 if (x==c_name)
  {
  return unescape(y);
  }
 }
}

function displayNotification()
{
if (typeof jQuery('#EUCookieMessage' != 'undefined'))
{
      jQuery('#EUCookieMessage').fadeIn("slow");
      if (typeof jQuery('##EUCookiewarning #EUCookiewarningtext' != 'undefined'))
      {
```

```
        jQuery("#EUCookiewarning #EUCookiewarningtext").append("In order for this site to work correctly we need to store a small file - called a cookie - on your computer.<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("We use cookies to store information to make your visit to this site richer and to personalize information according<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("to your interests. See our <a href=\"iSamples/Member/Privacy_Policy.aspx\" target=\"_blank\">privacy policy</a> for more information on what cookies are, how we use them<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("and how to change your preferences.<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("By continuing to use this site you are consenting to our use of cookies.<br/>");

        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");

    }

    var closeBtn = jQuery('#EUCookieMessage a.close-notify');

    closeBtn.click(function() {

    setCookie("IMISEUCookieConfirm",null,3650);

    jQuery('#EUCookieMessage').fadeOut("slow");

    return false;

        });

    }

}
```

```
function setCookie(c_name,value,exdays)
{
var exdate=new Date();
exdate.setDate(exdate.getDate() + exdays);
var c_value=escape(value) + ((exdays==null) ? "" : "; expires="+exdate.toUTCString());
document.cookie=c_name + "=" + c_value;
}

function checkCookie()
{
var cookieName="IMISEUCookieConfirm";
var cookieChk=getCookie(cookieName);
if ( typeof cookieChk === "undefined")
 {
 displayNotification();
 }
}

checkCookie();
```

Creating your websites

Creating a website is simple with iMIS! You can simply make a copy of one of the sample sites installed with iMIS and select a look and feel template and theme that is the best match for the look that you want for your new site.

Working with iMIS Sites

Because new and improved iParts and features are added to iMIS with every update, iMIS installs sample sites and a demo database that, together, fully demonstrate the more complex enhancements. These sample sites and data will remain synchronized with the ever-evolving state of iMIS, and will showcase new iParts, functionality, and UI improvements as they become available.

Using sample sites

iMIS installs with sample sites, such as Member and Member Mobile. The Member site shows how to build a RiSE site for your members and how to combine related iParts for features such as Commerce and Events. The Member Mobile site shows how to build a site optimized for mobile devices, such as smart phones and tablets.

It is easy to create your own customized website by using and copying a sample site. For detailed instructions on this process, see the topic Creating a site.

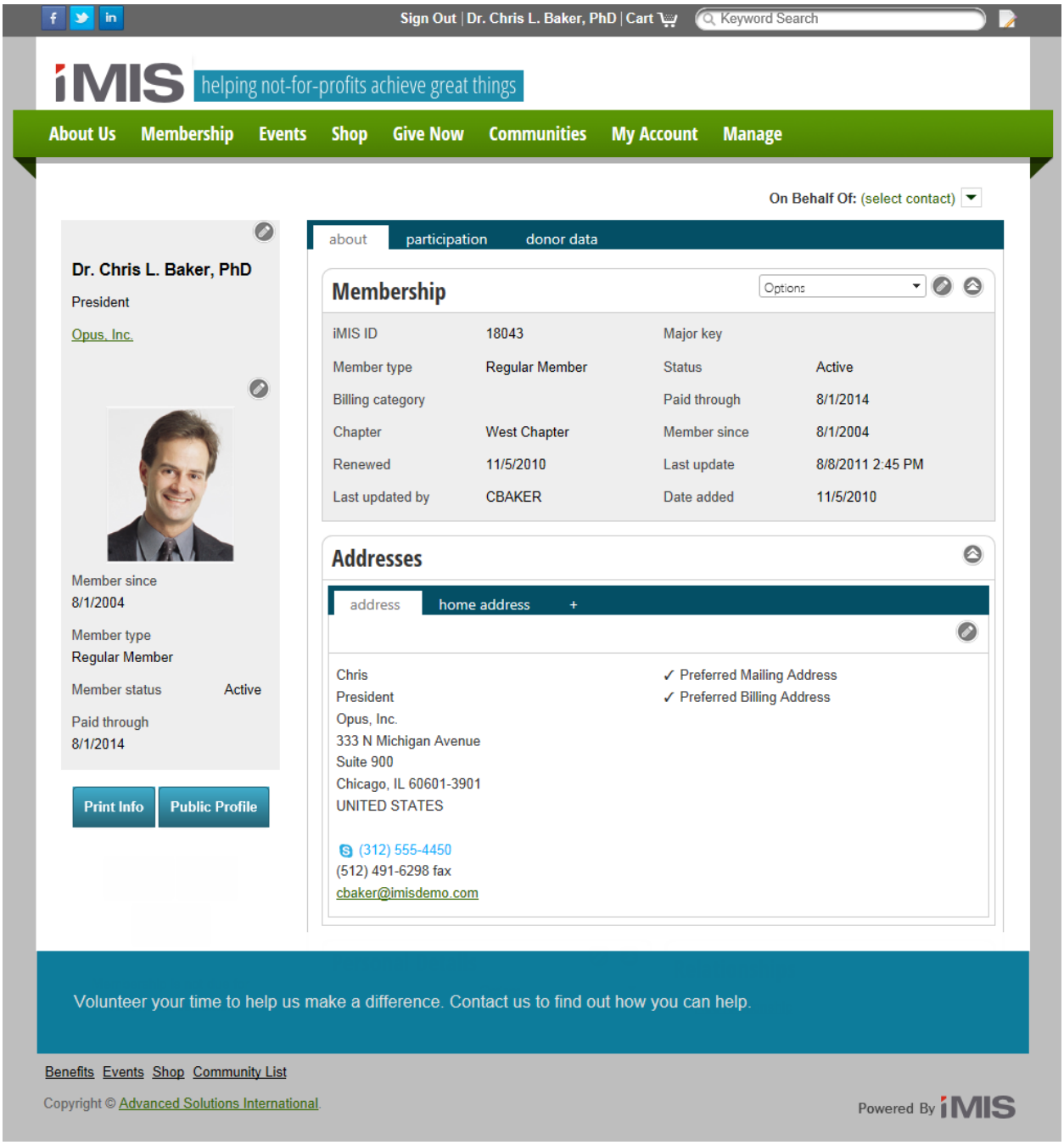
Note: By default, the starter sample sites are marked as Inactive. If you want to use a sample site, copy the site and enable the Is this website active option (RiSE > Manage websites > click the expand icon in the Status area).

By browsing to your Member site (http://yourvirtualroot/mbr), and to your Member Mobile site (http://yourvirtualroot/mobile), you can see how the iParts and pages present your current users and content. For example, if you have events currently defined and set to Show on web, you will see them populated on the Events page.

Tip: Upgrades overwrite the Member and Member Mobile sites, but you can add new content records and navigation items to the site for your own testing purposes. Upgrades will preserve your test objects.

Member site

The Member site offers a rich self-service experience for your members and prospects. This site enables you to choose from a variety of visual themes, change navigation in just a few clicks, and add any number of query-driven iParts to present dynamic information to your site visitors.



Member Mobile site

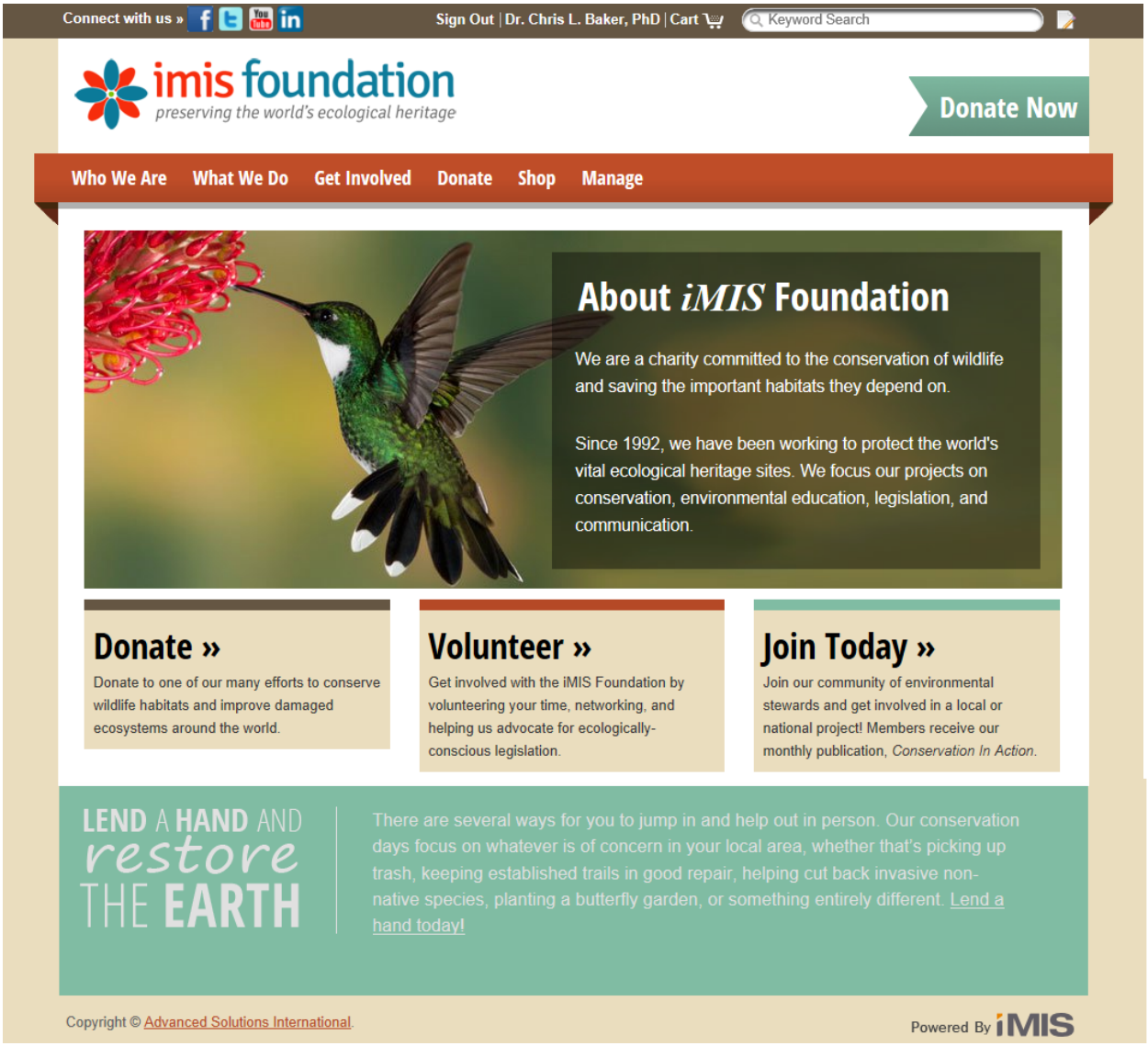
The Member Mobile site renders a version of the Member site that is optimized behaviorally and formatted for use on smart phones and tablets. This site is accessible by your members and by your staff who are working off-site or on the run.

Upcoming Spring Conference

Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.

Donor site

The Donor site offers a rich and highly customizable experience for fundraisers conducting charitable campaigns and product sales with the public.



Annual Conference site

The Annual Conference site offers a "micro site" experience to support your critical projects, such as an organization's annual conference. By shaping the site with unique content and structure, you can maximize the impact of the project without affecting your main

site or micro sites from different years. At the same time, iMIS seamlessly integrates content between your various sites.

Annual Conference Mobile site

The Annual Conference Mobile site renders a version of the Annual Conference that is optimized behaviorally and formatted for use on smart phones and tablets for both by your members and staff who are attending events. Attendees gain quick access to their personalized programs, activities, and event feeds – and can instantly look up directory profiles of those attending with them.

AT&T
1:19 PM
iMIS
Cart
Annual Conference
The Annual Conference is fast-approaching. Don't miss out – register today!
October 30 - November 1
Cairns, Australia
Learn More
HOME
NEWS

Staff site

The Staff site offers your staff members an easy, cloud-based, convenient way to manage all of your organization's business from the web. Staff can complete transactions and updates for your contacts, and help them renew, register, or purchase. This site also allows staff users to run reports, create and manage events, and utilize the robust RiSE tools. Using the powerful security features of iMIS, you can finely control which areas and content that each staff member can access.

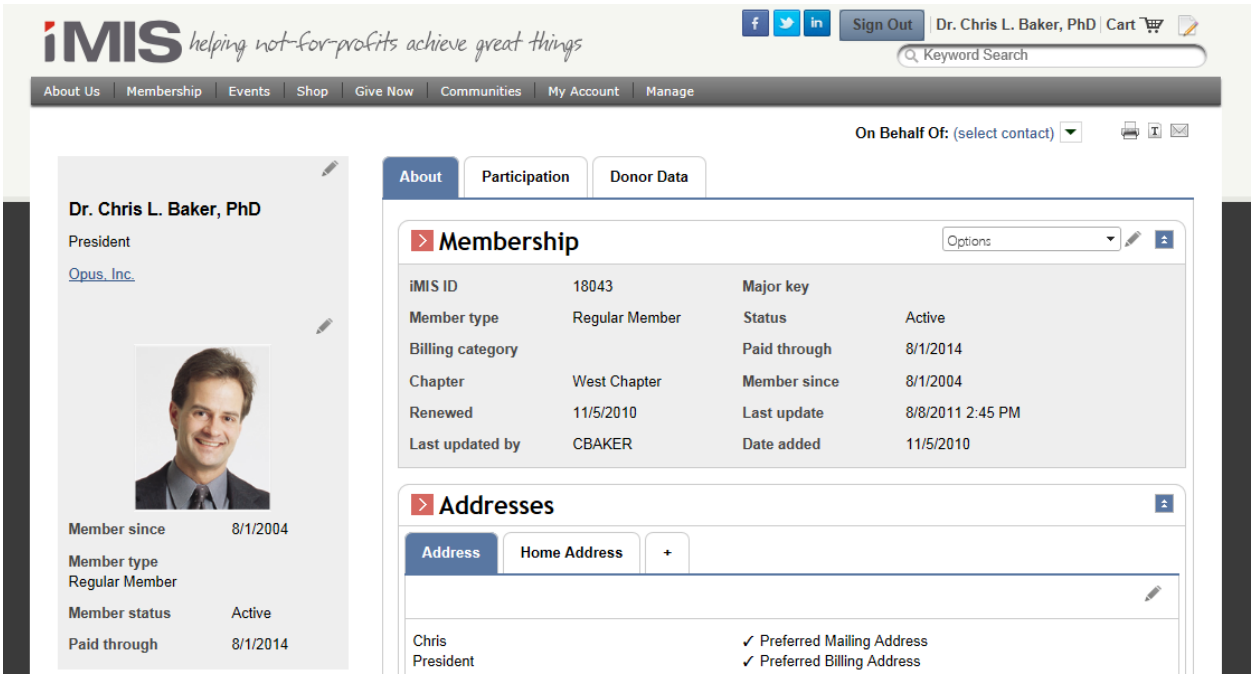
To use the DemoDB with the sample sites

To see the sample sites in action with sample data, you can connect to the demonstration database (DemoDB). This database includes a set of users and content sufficient to experience how the iParts work together.

1. Point your instance of iMIS to the DemoDB, which installs with iMIS.
2. Browse to the sample sites for this instance.

3. Sign in as Chris Baker: cbaker/cbaker.

   This user has full privileges to the system, so you can exercise all aspects of content lay-out, iPart configuration, and use.



4. Change the password for this user if you want to prevent unauthorized access to your demo site.
5. When you are ready to start making changes to the site you must make a copy. This helps you to avoid losing your changes when you upgrade iMIS. For more information on this strategy, see Creating a site. Items affected by upgrades span the demo data and the site itself:

- Site definition and navigation items
- Content records, including iPart configuration, arrangement, and connection
- User records and demo data (products, events, subscriptions)

Creating a site

To create a public-facing website that makes full use of iParts and SOA, it is easiest to copy an existing sample site, such as Member, and change it to meet your needs.

When you copy a website, iMIS duplicates the site navigation and content records for the new site.

Go to RiSE > Site Designer > Manage websites:

1. Select a website from the list of websites and review the following fields before you proceed:

- (Properties tab) Make sure the folder selected for the Website-specific parent content folder field contains the content unique to this website. Only the content in this site-specific folder will be copied. Any content shared with another website should be placed in a separate, shared folder.
- (Look and Feel tab) The Folder containing template content is normally a sub-folder of the parent folder. If the template content (footer area, header logo, and so forth) is stored in a different folder, select that folder instead.

2. Copy a website:

1. Select Organize > Copy.
2. Select the folder where you want to paste the new website.
3. Select Organize > Paste.
4. Enter the Name of the new website, for example, MemberCopy. Do not use special characters or punctuation.

   Note: During the copy process, Content Codes are cleared from content records because this code must be unique for each content record. A warning message displays a list of the content records where the Content Code was cleared. See the log files for details.

3. Copy an out-of-the-box Master Page and Theme to be unique to your new website.

   Note: The themes change and develop with every iMIS update. To avoid losing your changes, be sure to work from a copy of the theme. Creating a copy of a theme also ensures that you do not compromise your ability to fall back to a working original. Follow these steps to copy a theme, which is far easier than creating one from scratch.

1. Select your new website.
2. (Look and Feel tab) Select the master page and theme|topic=Sample site themes and master pages that you want for your new site.
3. Locate the theme folder (such as \Aspen), which defaults to C:\Program Files\ASI\iMIS\Net\App_Themes.
4. Copy, paste, and rename \Aspen to your new site name (\ABC).
5. Locate the master page (such as Forest.master), which defaults to C:\Program Files\ASI\iMIS\Net\Templates\MasterPages
6. Copy, paste, and rename Forest.master to your new site name (MemberCopy.master).
4. Edit your site to use your new theme files.

- Select Site Designer > Manage Websites and highlight your site (ABC).
- Edit the site Look and Feel to point to your new theme files:
- MasterPage/Template: select ABC
- Theme: select ABC
- Select Save.

5. Click the expand icon in the Status area, and enable the Is this website active option.
6. Publish the website:

- Select the newly copied website and select Publish.
- Publish the website's content folders:
- Go to Content Designer > Manage content.
- Select the content folder of the copied website.
- Select Publish. As each folder and content record publishes, the status will change from PublishPending to Published.

- If the website is hosted on a separate web server, publish the Core Content folder. See Installing WCM on web servers for more information on hosting a site on a separate web server.
- Go to Content Designer > Manage content.
- Select the Core Content folder.
- Select Publish menu and choose the Publish All Items option. As each folder and content record publishes, the status will change from PublishPending to Published.

7. After all content folders are published, log off and close the browser.

   Note: If the website you copied contains URL shortcuts, be sure to review those shortcuts in your new website to determine if you need to create fresh shortcuts. For example, when you select the iMIS logo in the Member site, the page redirects to the shared Member Home content record. When you make a copy of the Member site and you select the iMIS logo from the new site, you will be redirected to the same shared Member Home content record. To resolve this, create a fresh shortcut that will point to your new Member Home.

Deleting a website

A website administrator can delete a website and the content records associated with the website. However, you should proceed with caution, as a deleted website cannot be retrieved. Ensure the website is not a production site.

Go to RiSE > Site Designer > Manage websites:

1. Select the website you want to delete (such as MemberCopy).
2. Select Organize > Delete. A warning message is displayed.
3. Click OK. A results window is displayed.
4. Click Close.
5. Select Recycle Bin.
6. Select Organize > Empty the Recycle Bin. A warning message is displayed.

7. Click OK. A results window is displayed.
8. Click Close.
9. Go to RiSE > Content Designer > Manage content.
10. Select the content folder of the copied website.
11. Select Organize > Delete. A warning message is displayed.
12. Click OK. A results window is displayed.
13. Click Close.
14. Select Recycle Bin.
15. Select Organize > Empty the Recycle Bin. A warning message is displayed.
16. Click OK. A results window is displayed.
17. Click Close.

Implementing a mobile site

The Member Mobile sample site is optimal for mobile devices like smart phones and tablets, featuring accessible content and a sitemap for members needing information on the go. The master page Sapling places key information at the top of the screen and works with the Aspen Mobile and Austin Mobile themes; featured styles are sized appropriately for smaller screens.

If you want to provide a mobile site for your members, we recommend that you start with a copy of the Member Mobile sample site, and then apply your changes. When you make a copy of the site, iMIS creates a copy of the website, content, and sitemap.

Note: Before the following required steps, you must complete your copy of the mobile site. See Copying a website.

To implement a mobile site, do the following:

Go to RiSE > Site Designer > Manage sitemaps:

1. Choose your copy of the Member Mobile site.
2. Edit the Full Site navigation item to add your main site's URL to the Content or URL to Link to.
3. Go to RiSE > Content Designer > Manage content, then select the content folder created for your copy of the mobile site.
4. From the ContentAreas folder, edit the following content records:

- Social Networking Images: Configure the Social Networking instance of the Content Html iPart, and from the <>HTML tab, update the href's to link to your social media accounts or remove any links you do not want to appear.
- Header Logo: Configure the Header Logo Span instance of the Content Html iPart and update the logo to your organization's logo.
- Footer Copyright: Configure the Footer Copyright instance of the Content Html iPart, and update the content and link for your organization.

Tips and reminders

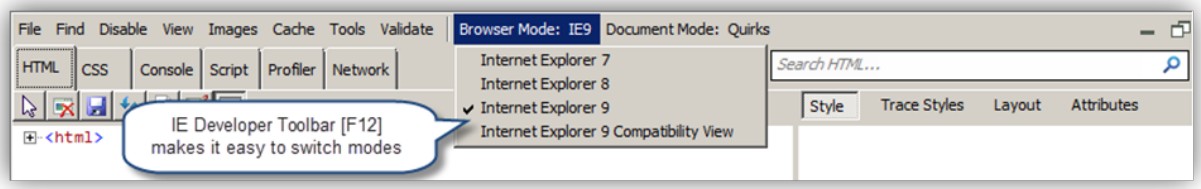
- Trim content – For easier reading on small screens, and to decrease page load time, keep content simple.
- Automatic redirect – Consider adding some JavaScript to redirect users automatically to the mobile site when they try to access your full site on mobile devices.
- Add favicon – Update the favicon used for your mobile site, apple-touch-icon, located by default in C:\Program Files\ASI\iMIS\Net.
- Surf-to-Edit limits – When you access the mobile site, Surf-to-Edit is only available when you access the website from a browser with a width larger than 700 pixels.

Modifying site themes

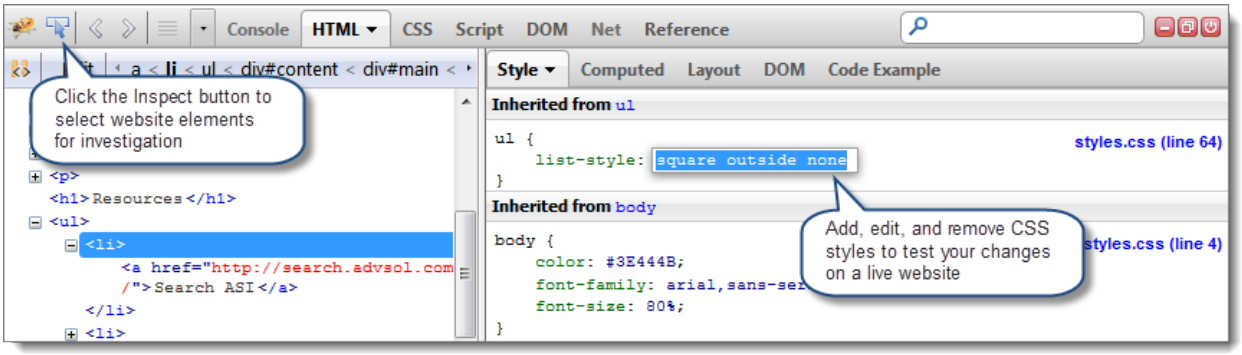
Several themes have been created for the sample sites. You can modify these themes to help identify and personalize your organization's website.

Best practices for theme development

- Caution: Never change the core style sheets 00-Reset.css and 10-UltraWave.css. All derivative themes inherit from these files, and any changes you make to them are lost on upgrade. Instead, override the base styles in your 99-[theme].css.
- Before modifying a theme, find the best one: apply all of the themes to the default Member site in turn, and decide which theme is closest to the final look and layout that you want.
- Always work from your copy of the theme, so that you can begin again. See Copying a website theme.
- Make changes only to websites that you create. When a sample site is updated with each release, the iMIS Upgrader overwrites any changes you made to it.
- Take advantage of browser-based developer tools to test and troubleshoot changes before committing them to your style sheets:
- Internet Explorer and Chrome: Press F12 to toggle the Developer Toolbar.



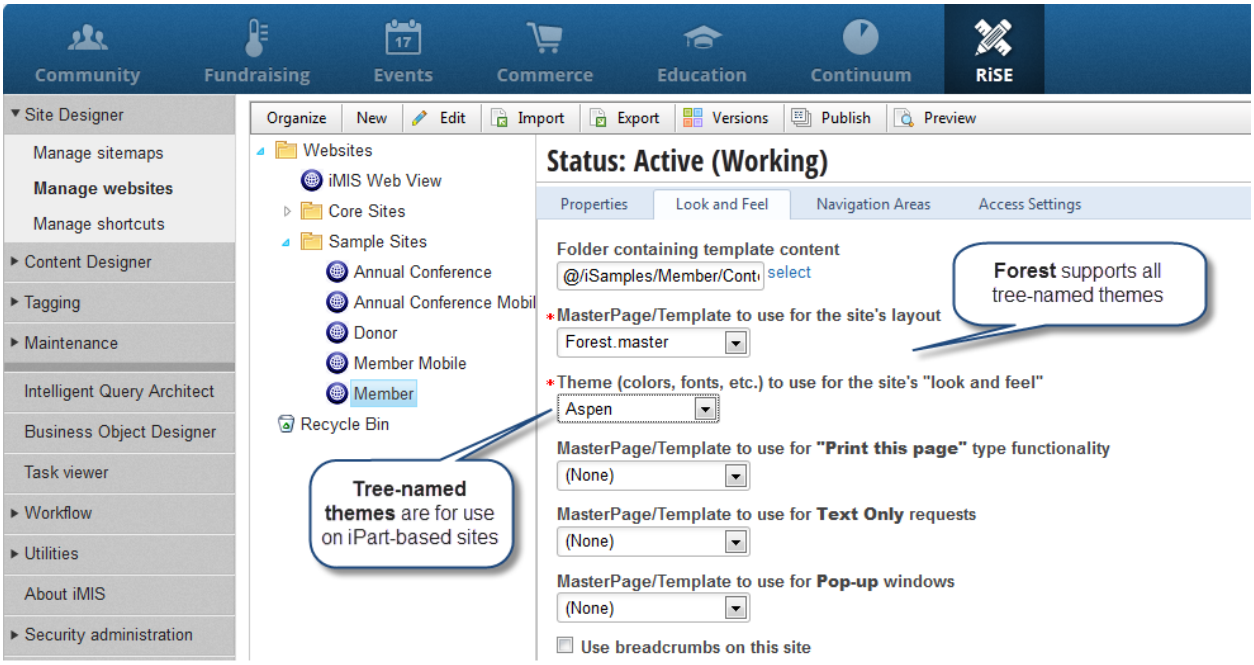
- FireFox: Install the Firebug add-on to see a wealth of information about the structure of the website and the styles it is using. Turn on the element inspector and click a piece of content to see the styling that it is implementing:



Sample themes and master pages

You can change the look and feel of the sample sites by selecting different combinations of a Master Page and its matching Theme. If you want to modify a particular design for your website, make sure you create a copy of the master page and theme before making any changes. See Creating a site for more information.

Note: iMIS themes give you a head start on developing your website. To provide you an idea of how things could look, we have used numerous pictures, illustrations, and images that we purchased under a limited license for ASI's use. The icons can be used on your website, but if you reuse any of the other images, you will need to buy a license. We acquire the majority of our images from iStockPhoto and most are available in the range of $15-$50; much less than the cost and labor of creating them on your own. If you have any questions, please contact us.



Example: Selecting a theme created for the Forest master page

Important: If possible, avoid customization to master pages. If you do need to make changes, make the changes in a copy of the master page. Any customizations performed to the out-of-the-box master pages will be overwritten after an upgrade.

The following designs are available out-of-the-box for iMIS sample sites.

City.master

The set of city-named themes support RiSE sites and can be used interchangeably with the City master page.

Available theme:

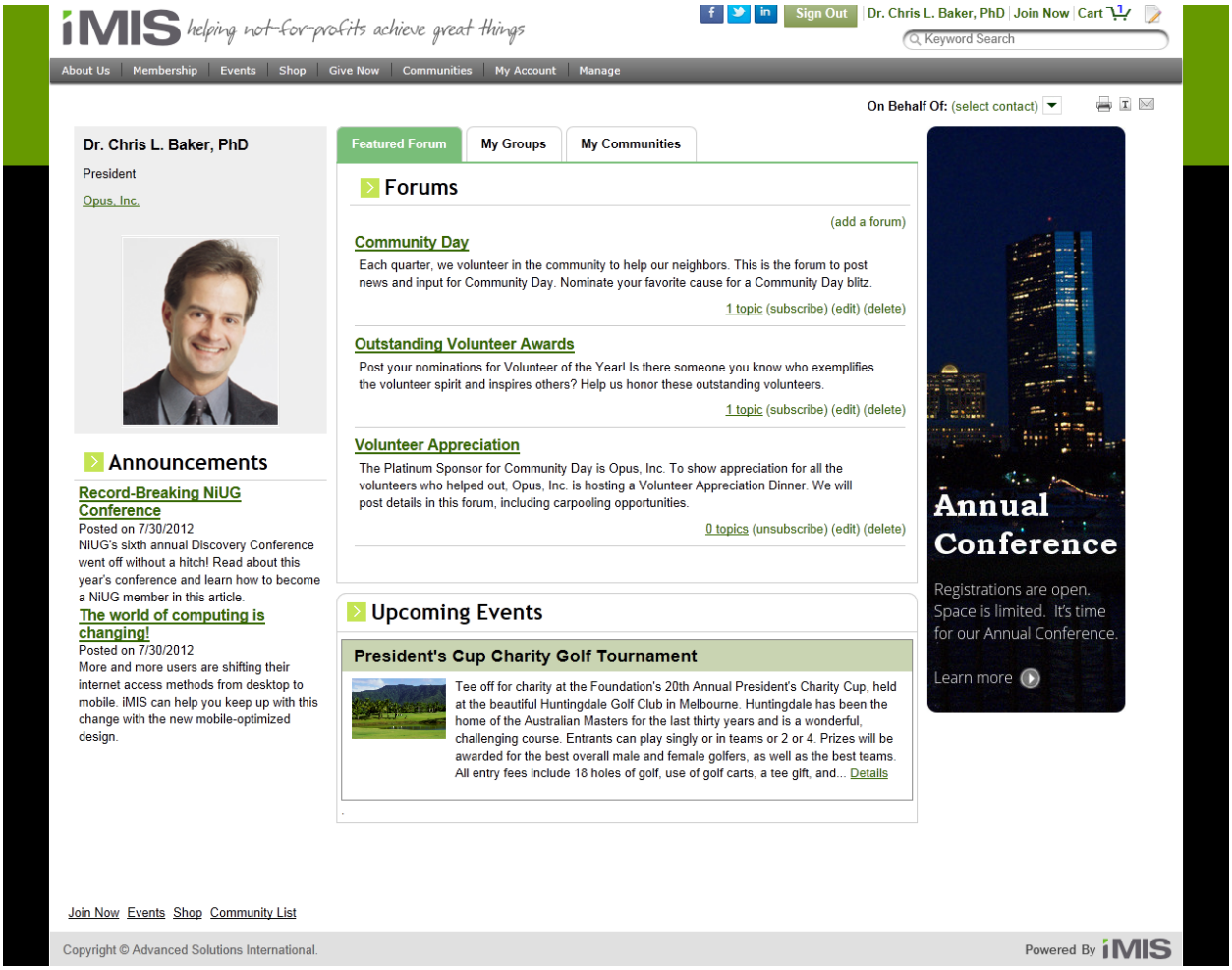
Austin

Forest.master

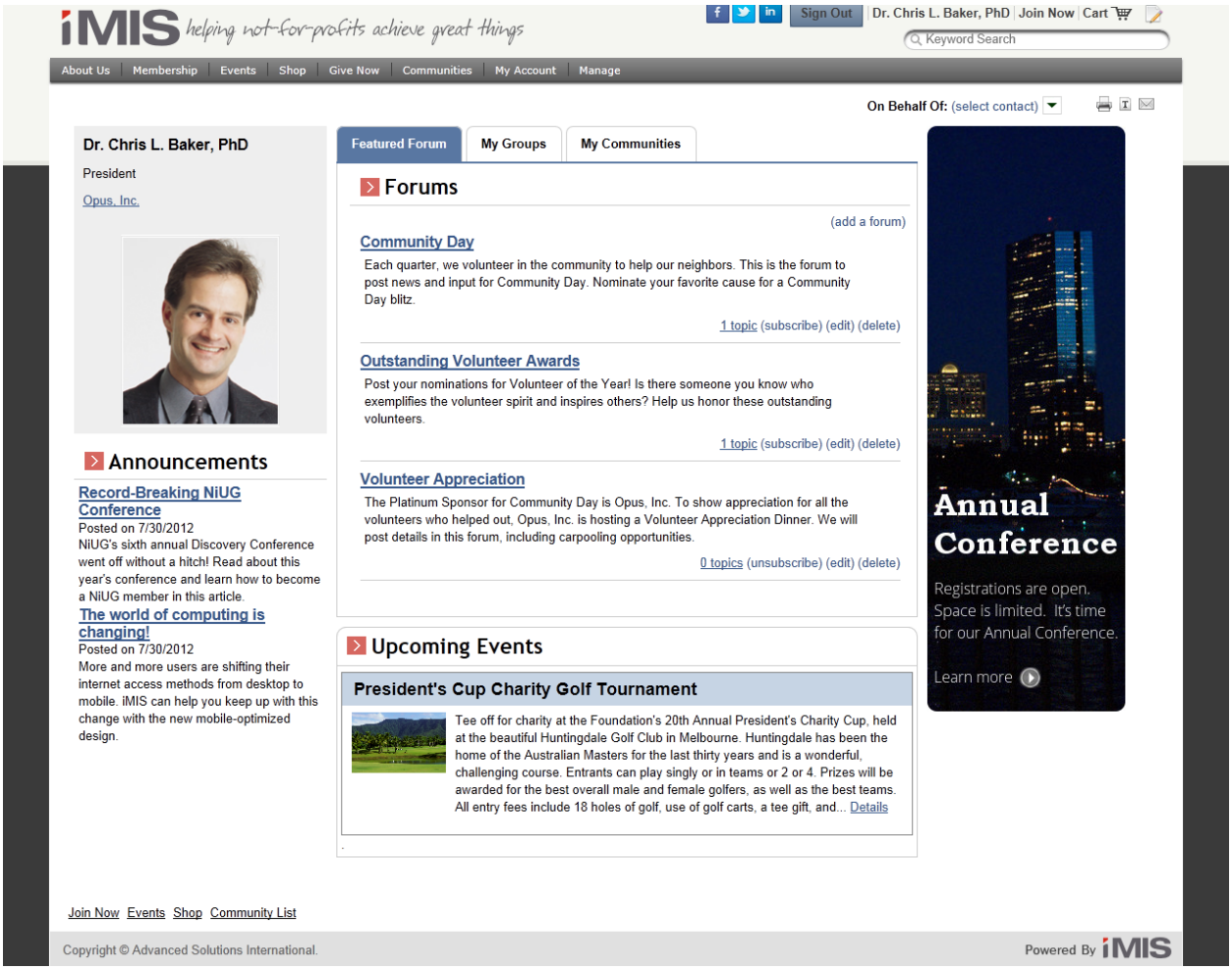
The set of tree-named themes support RiSE sites and can be used interchangeably with the Forest master page.

Available themes:

Aspen



Aspen2


iMIS helping not-for-profits achieve great things
Sign Out
Dr. Chris L. Baker, PhD | Join Now | Cart
Keyword Search
About Us | Membership | Events | Shop | Give Now | Communities | My Account | Manage
On Behalf Of: (select contact)
Dr. Chris L. Baker, PhD
President
Opus, Inc.
Announcements
Record-Breaking NiUG Conference
Posted on 7/30/2012
NiUG's sixth annual Discovery Conference went off without a hitch! Read about this year's conference and learn how to become a NiUG member in this article.
The world of computing is changing!
Posted on 7/30/2012
More and more users are shifting their internet access methods from desktop to mobile. iMIS can help you keep up with this change with the new mobile-optimized design.
Featured Forum
My Groups
My Communities
Forums
(add a forum)
Community Day
Each quarter, we volunteer in the community to help our neighbors. This is the forum to post news and input for Community Day. Nominate your favorite cause for a Community Day blitz.
1 topic (subscribe) (edit) (delete)
Outstanding Volunteer Awards
Post your nominations for Volunteer of the Year! Is there someone you know who exemplifies the volunteer spirit and inspires others? Help us honor these outstanding volunteers.
1 topic (subscribe) (edit) (delete)
Volunteer Appreciation
The Platinum Sponsor for Community Day is Opus, Inc. To show appreciation for all the volunteers who helped out, Opus, Inc. is hosting a Volunteer Appreciation Dinner. We will post details in this forum, including carpooling opportunities.
0 topics (unsubscribe) (edit) (delete)
Upcoming Events
President's Cup Charity Golf Tournament
Tee off for charity at the Foundation's 20th Annual President's Charity Cup, held at the beautiful Huntingdale Golf Club in Melbourne. Huntingdale has been the home of the Australian Masters for the last thirty years and is a wonderful, challenging course. Entrants can play singly or in teams or 2 or 4. Prizes will be awarded for the best overall male and female golfers, as well as the best teams. All entry fees include 18 holes of golf, use of golf carts, a tee gift, and... Details
Annual Conference
Registrations are open. Space is limited. It's time for our Annual Conference.
Learn more
Join Now Events Shop Community List
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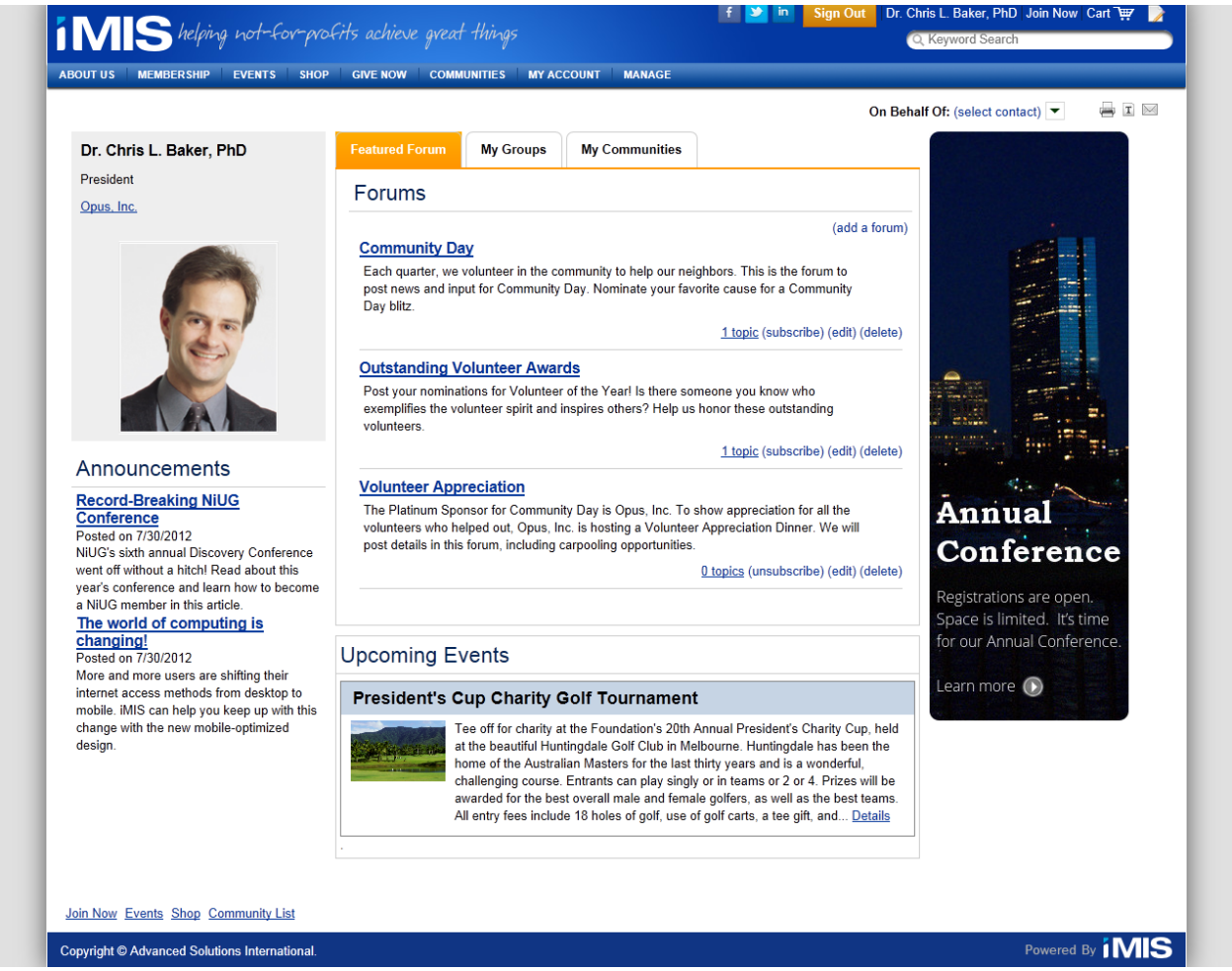
Birch

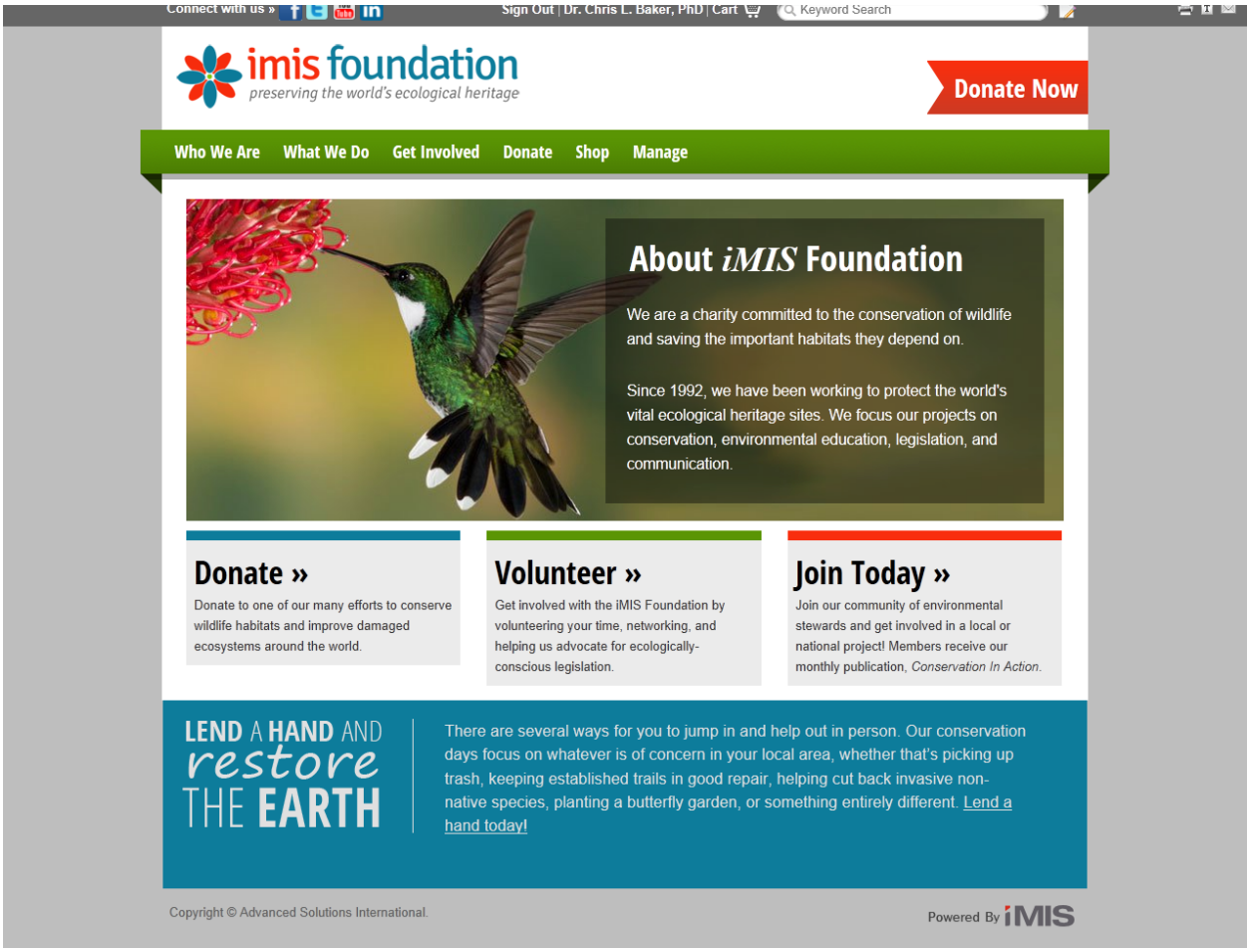


Planets.master

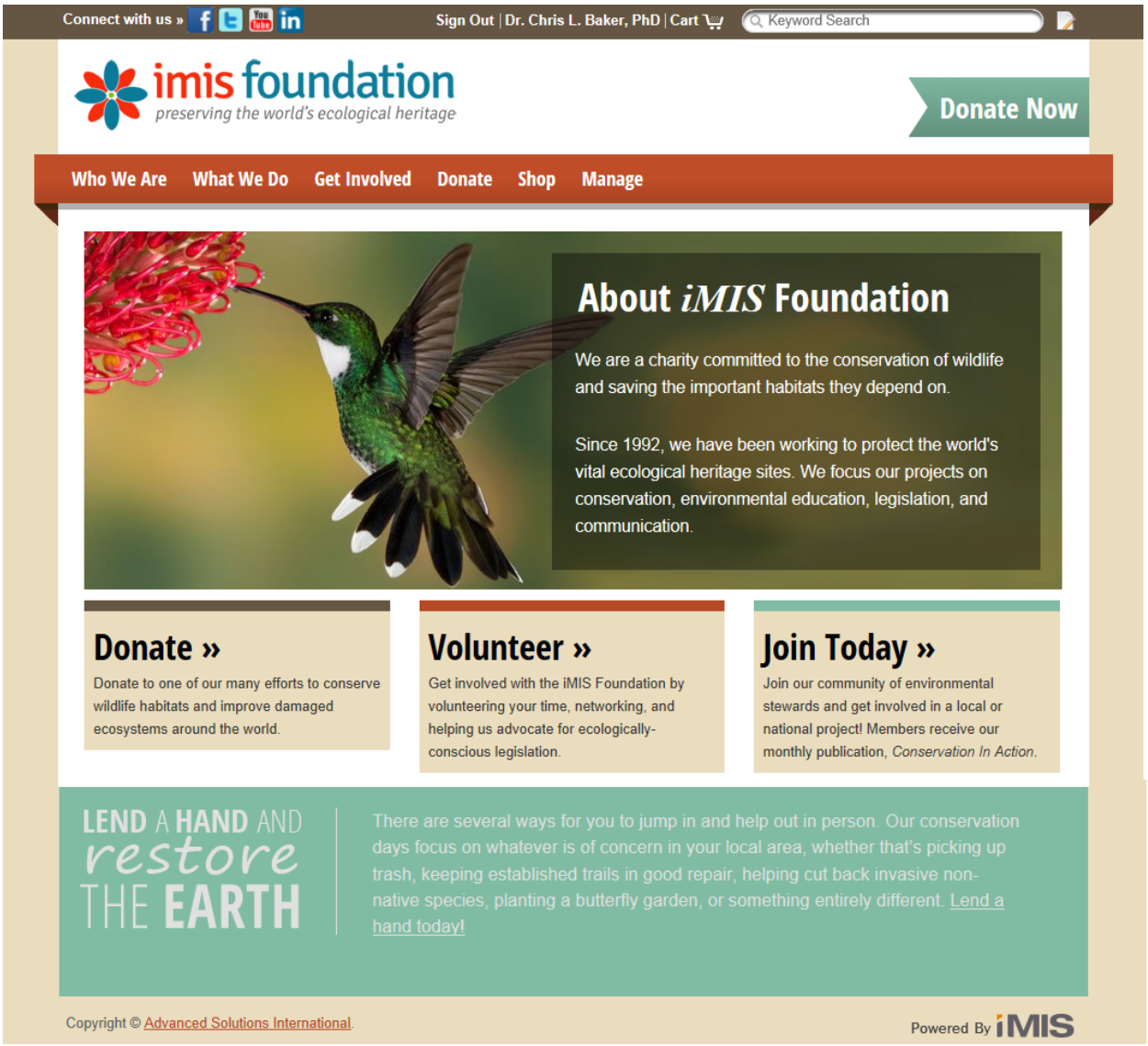
The set of planet-named themes support RiSE sites and can be used interchangeably with the Planets master page.

Available themes:

Mercury


Connect with us »
Sign Out | Dr. Chris L. Baker, PhD | Cart
Keyword Search
imis foundation
preserving the world's ecological heritage
Donate Now
Who We Are
What We Do
Get Involved
Donate
Shop
Manage
About iMIS Foundation
We are a charity committed to the conservation of wildlife and saving the important habitats they depend on.
Since 1992, we have been working to protect the world's vital ecological heritage sites. We focus our projects on conservation, environmental education, legislation, and communication.
Donate »
Donate to one of our many efforts to conserve wildlife habitats and improve damaged ecosystems around the world.
Volunteer »
Get involved with the iMIS Foundation by volunteering your time, networking, and helping us advocate for ecologically-conscious legislation.
Join Today »
Join our community of environmental stewards and get involved in a local or national project! Members receive our monthly publication, Conservation In Action.
LEND A HAND AND restore THE EARTH
There are several ways for you to jump in and help out in person. Our conservation days focus on whatever is of concern in your local area, whether that's picking up trash, keeping established trails in good repair, helping cut back invasive non-native species, planting a butterfly garden, or something entirely different. Lend a hand today!
Copyright © Advanced Solutions International.
Powered By iMIS

Venus


Connect with us »
Sign Out | Dr. Chris L. Baker, PhD | Cart
Keyword Search
imis foundation
preserving the world's ecological heritage
Donate Now
Who We Are
What We Do
Get Involved
Donate
Shop
Manage
About iMIS Foundation
We are a charity committed to the conservation of wildlife and saving the important habitats they depend on.
Since 1992, we have been working to protect the world's vital ecological heritage sites. We focus our projects on conservation, environmental education, legislation, and communication.
Donate »
Donate to one of our many efforts to conserve wildlife habitats and improve damaged ecosystems around the world.
Volunteer »
Get involved with the iMIS Foundation by volunteering your time, networking, and helping us advocate for ecologically-conscious legislation.
Join Today »
Join our community of environmental stewards and get involved in a local or national project! Members receive our monthly publication, Conservation In Action.
LEND A HAND AND restore THE EARTH
There are several ways for you to jump in and help out in person. Our conservation days focus on whatever is of concern in your local area, whether that's picking up trash, keeping established trails in good repair, helping cut back invasive non-native species, planting a butterfly garden, or something entirely different. Lend a hand today!
Copyright © Advanced Solutions International.
Powered By iMIS

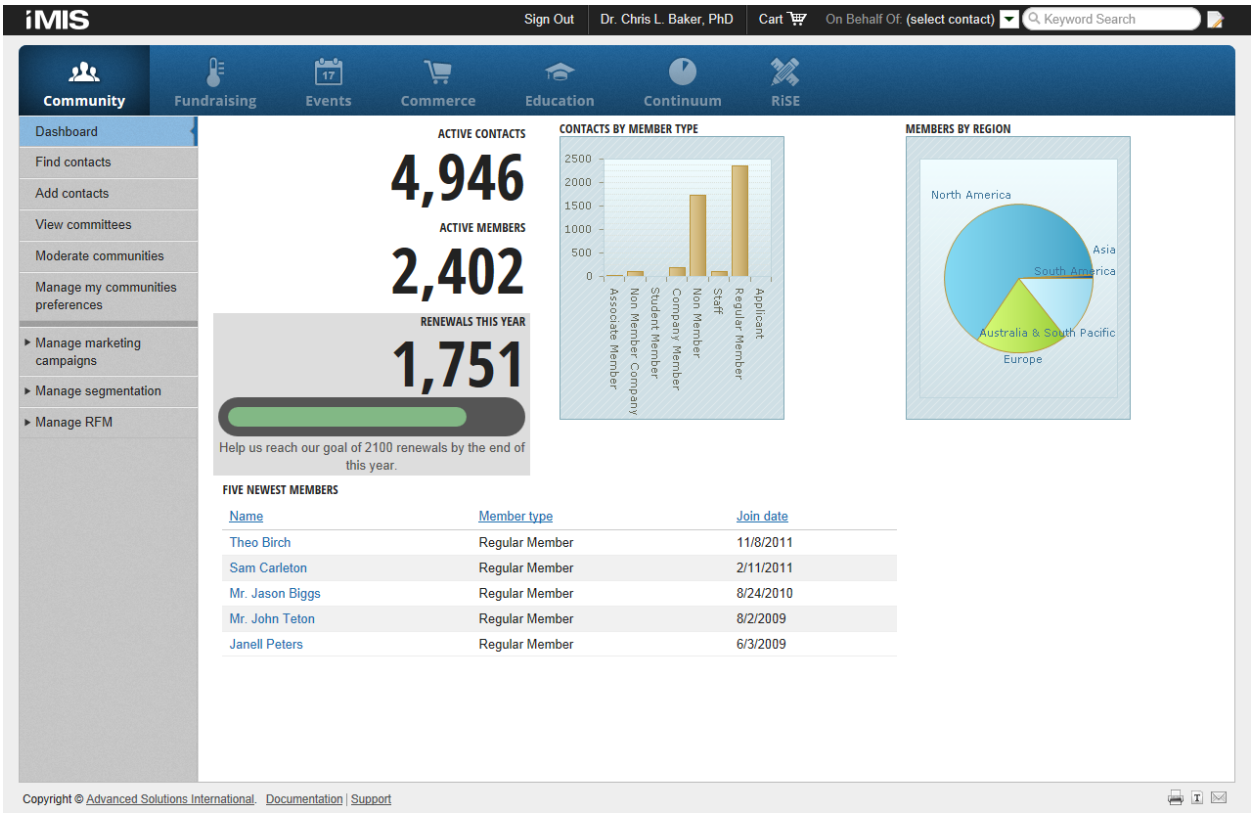
Mars

Mountains.master

The Mountains master page was created specifically for staff functionality. It should not be used with member-facing websites.

Available theme:

Everest



Sapling.master

The Sapling master page was created for mobile devices.

Available themes:

Aspen_Mobile

Upcoming Spring Conference

Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.

Austin_Mobile

AT&T
1:19 PM
iMIS
Cart
Annual Conference
The Annual Conference is fast-approaching. Don't miss out – register today!
October 30 - November 1
Cairns, Australia
Learn More
HOME
NEWS

UltraWave and Universal Design

The Sample site themes and master pages build upon a new underlying template called UltraWave. UltraWave incorporates structure and styling for Universal Design. Universal Design seeks to make web content "barrier-free," making sites accessible to all challenged users. Challenged users include not only the millions of physically or cognitively impaired, but also seniors, non-native speakers, and those in other countries and cultures (localization).

Universal Design has benefits beyond helping websites meet the myriad of web accessibility standards: it also aids in breaking technology and human barriers. Universal Design is the foundation for transforming pages and content into outputs and displays your members may need, including print presentation, net book usage, and even cell phone applications.

Important: UltraWave themes support RiSE sites, which are an alternative to Public view. They do not support existing Public views.

Features of the template include:

- Developed toward W3C standards to help meet accessibility requirements
- Fluid-width template dynamically reflows content to fit your user's browser window
- Clean, minimal design uses neutral shades and layout
- Offers a streamlined set of stylesheets and skins
- Easily customized with logos, fonts, and colors
- Designed to be easily rebranded by your organization

Copying a website theme

Themes control the layout, font, and colors of your iMIS sites. The sample sites come with a set of special themes, designed for RiSE sites. See Sample site themes and master pages for a list of available themes.

Creating a copy of a theme also ensures that you do not compromise your ability to fall back to an original that works. Follow these steps to copy a theme, which is far easier than creating one from scratch.

Note: The themes change and develop with every iMIS update. To avoid losing your changes, be sure to work from a copy of the theme, as outlined below.

1. Copy an out-of-the-box theme and master page to be unique to your new site.

- Locate the theme folder (such as \Aspen), which defaults to C:\Program Files\ASI\iMIS\Net\App_Themes.
- Copy, paste, and rename \Aspen to your new site name (\ABC).
- Locate the master page (such as Forest.master), which defaults to C:\Program Files\ASI\iMIS\Net\Templates\MasterPages.
- Copy, paste, and rename Forest.master to your new site name (ABC.master).

Go to RiSE > Site Designer > Manage websites:

2. Edit your site to use your new theme files.

- Highlight your site (ABC).
- Edit the Site Look and Feel to point to your new theme files:
- MasterPage/Template: select ABC
- Theme: select ABC
- Select Save and Publish.

3. Edit your theme files as needed to tailor the design.

Changing theme headers

The first elements to change on your website are the highly visible elements that public visitors see and use in the header: logo, social networking links, welcome banner, and the favicon.

Logo

The header logo is contained in a content record: @\[theme]\ContentAreas\Header Logo. To add your own logo, edit this content record, remove the contents in the HTML iPart, and replace with your own logo.

Note: Alternatively, you can change the logo in the CSS. The logo is set in 99-[theme].css by the selector #masterHeaderImage. Change the background image and the dimensions to match your own logo.

Social networking links

The links to the social networking sites in the top (auxiliary) navigation are also defined in a content record: @\[theme]\ContentAreas\Social Networking Images.

To change the links to navigate to your own social networking pages, edit the content record and change the links on the icons.

In the HTML editor, replace the href on each <a> tag with the appropriate URL. For example:

Favicon

The favicon is the little icon that displays next to the website in your bookmarks and on the browser tab in modern browsers. Changing it to your organizations' icon is simple: create an icon sized either 32x32 or 64x64 pixels and name it Favicon.ico. Then overwrite the original file:

C:\Program Files\ASI\iMIS\Net\Favicon.ico

Update the copyright statement

The copyright statement is contained in a content record within your copied site's ContentAreas folder: Footer Copyright. Edit the Footer Copyright instance of the Content Html iPart on that page to update the copyright.

Changing theme colors

The next step in customizing your theme is to change to colors that support your branding & style. You will make these changes in both CSS and in images.

CSS colors

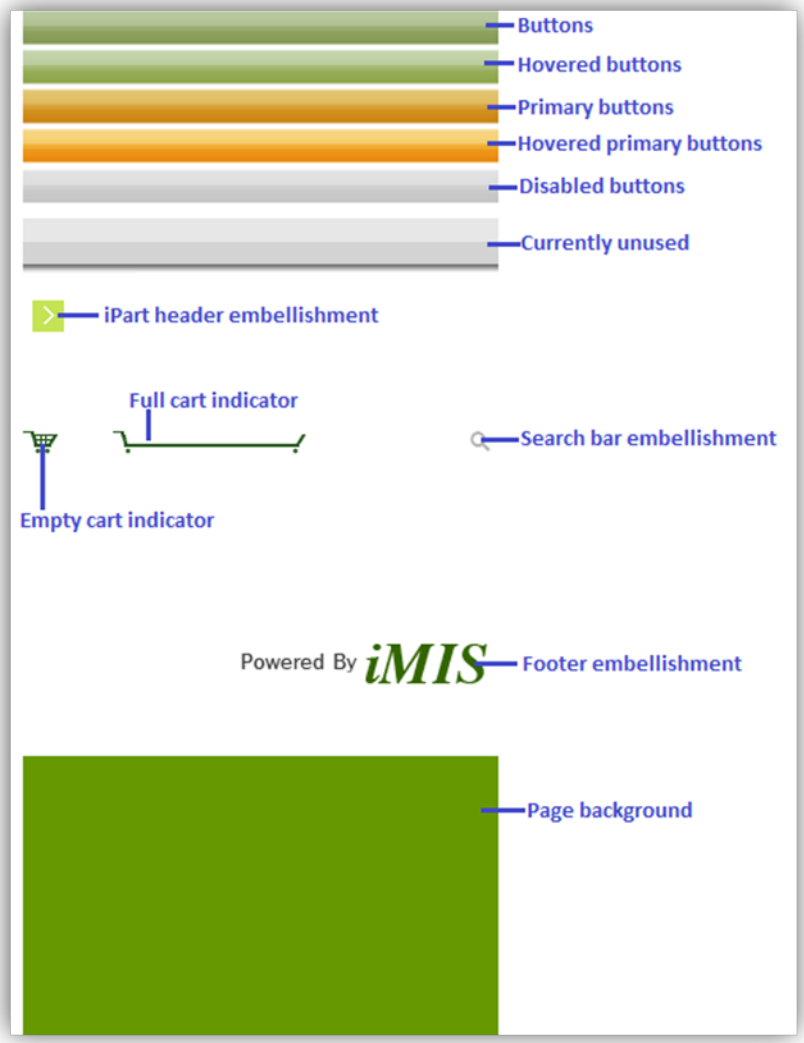
All theme-specific color and styling is located in 99-[theme].css. To find all color references that you might want to change, search the CSS file for these strings:

- color
- border
- background

We also recommend using your browser development tools to help you identify which styles you need to update for your color changes.

Sprite colors

A few of the theme's use sprites to control some of the site colors. A sprite is a single image that combines several commonly used images into one file. CSS then defines which part of the image displays for various purposes. Because your server only has to load a single image instead of several, using sprites reduces load time for your website. To improve performance, the new sample sites use sprites when possible. The image below shows a sprite used in the theme Aspen, and labels where each image is used:



You can either edit the sprite we have provided (which is easier), or create your own.

- When editing the provided sprite, keep all elements in their original pixel coordinates, so that you do not have to edit the related CSS.
- The .png version of the sprite is located in images/[theme]_sprite.png. You can edit this image in your favorite image editor, but we do not recommend editing in MS Paint, as you will lose the background transparency.
- Your theme's \Resource folder also includes a .psd source file of each sprite. You can edit the .psd with Photoshop or GIMP, a free image editor that can edit and save images in .psd and web-safe formats.

- If you edit the .psd, save your new image as a .png, and place it in the images folder of your theme.

  For greater design control, you also have the option of creating your own sprite. If you choose that option, you may also need to update your theme CSS for the new coordinates of the sprite. To help you with this process, we recommend the following resources:

- CSS Sprites: What They Are, Why They're Cool, and How To Use Them
- Sprite Cow calculates the pixel positions of the various images inside your sprite.
- CSS Sprite Generator lets you upload a zip file of images and get back a sprite file with the corresponding CSS.

Changing theme home pages

The Member site uses a pair of home pages: one that appears to guests (unauthenticated view) and another that appears to those who have signed in (authenticated view). You can change one or both of them, or drop one entirely and have one home page appear to all.

Do the following to change the unauthenticated home page:

Go to RiSE > Content Designer > Manage content:

Note: To have your own home page behave like the default one (switch to the authenticated home page when the user signs in), you need to add the code-bearing HTML iPart that does so.

1. Create a new content record for your unauthenticated home page.
2. Copy the AuthScript code to your new home page:

- Edit the unauthenticated home page content record @\iSamples\Member\Home.
- Locate the HTML iPart named AuthScript.
- Select Move To and select your unauthenticated home page.

- Now edit your unauthenticated home page and move the AuthScript iPart to the top of the content record.
- Save and Publish your home page.

3. Make your site's home page link to your new home page.

- Go to Site Designer > Manage sitemaps.
- Select your website.
- Edit the default navigation item (flagged with ★) and select your new home page for Content or URL to Link to.
- Save and Publish your sitemap.

Do the following to change the authenticated page:

Go to RiSE > Content Designer > Manage content:

Note: To have your own authenticated home page appear as soon as the user signs in, you need to edit the code-bearing HTML iPart that calls it.

1. Edit your unauthenticated home page content record.
2. Locate the HTML iPart named AuthScript.
3. Select Configure and switch the editor's view from Design to HTML, to view the code.
4. Edit the path to be the published path of your new authenticated home page:

path = "~/Mbr/Home/[theme]/MemberHome.aspx";

Do the following to use only one home page.

You can drop to a single home page either by:

- Removing the script that opens the authenticated home page:
- Go to Content Designer > Manage content and Edit the unauthenticated home page @\[site]\Home and delete the HTML iPart named AuthScript.
- Substituting your own page entirely:

- Go to Site Designer > Manage sitemaps and set your desired content record to be the default home page of your website.

Changing Telerik skins

Several iParts throughout the product use Rad Controls developed by Telerik. These controls require a few steps to style, and Telerik resources can help you get started:

- Telerik Control Guide – an overview of Telerik controls, including available skins.
- Telerik Visual Style Builder – generates CSS and some images for skinning Telerik controls.

Every [theme].skin file lists all of the Telerik skins that it uses to style controls. If a control does not explicitly define a theme, then it uses the Default Telerik skin.

Rad Window control

This control is the pop-up window that we see in many iParts. Its skin is set by two lines in Aspen.skin:

<asiweb:Window runat="server" Skin="Forest" />

<asiweb:WindowManager runat="server" Skin="Forest" />

Forest is a skin designed by Telerik and is available on most Telerik controls, along with a handful of other Skins. You can preview available Telerik skins for this control.

Tip: Telerik skins are easy to switch out and virtually maintenance-free. However, they are difficult to customize, so avoid this route unless you can use the skins as-is.

Rad Tab Strip

This control is used by the Content Collection Organizer (CCO) iPart, the Contact Address Editor iPart, and most other places where you see a tab strip. This line defines the skin:

<telerik:RadTabStrip runat="server" Skin="Aspen" EnableEmbeddedSkins="false" />

The definition for this look and feel is near the bottom of the 99-[theme].css, under the heading RadTools Styles.

Rad Menu control

This control displays the primary navigation area. There is wrapper for this control called PageNavR, so this line defines the skin:

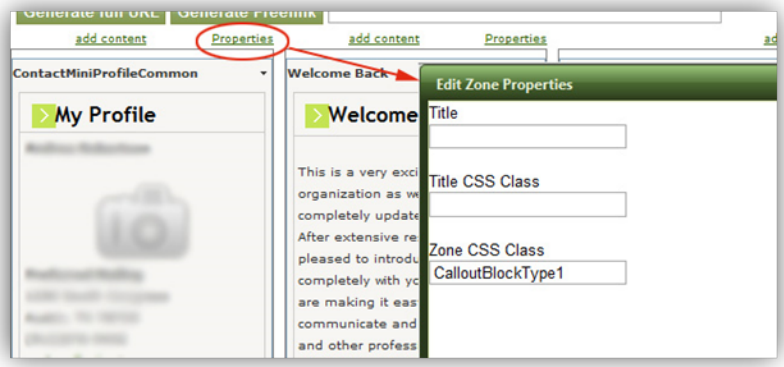
<asi:PageNavR runat="server" Skin="Aspen" EnableEmbeddedSkins="false" … />

The styling for the Rad Menu is located in Menu.[theme].css, and the image sprite is under [theme]\Menu\rmSprite.png. The easiest way to customize this control is to use Telerik's Visual Style Builder. (Tip: This tool works best in Internet Explorer.)

Changing zone properties

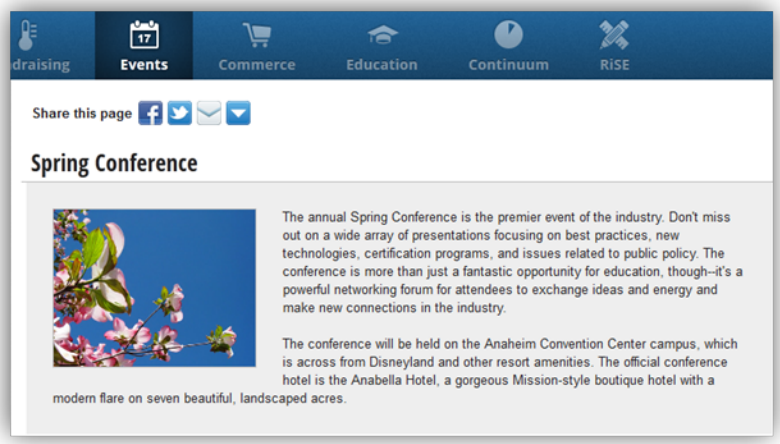
Zone properties make it easy to apply unique styling to specific iParts, for emphasis and contrast.

To apply a style to an iPart's zone property, edit the content record, click Properties, and enter the name of the class in Zone CSS Class:

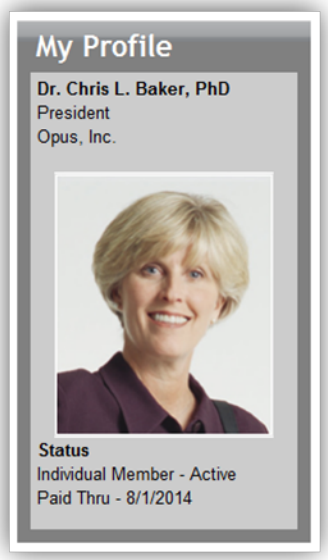


You can add more if needed, but all tree-name themes contain the following three zone style classes:

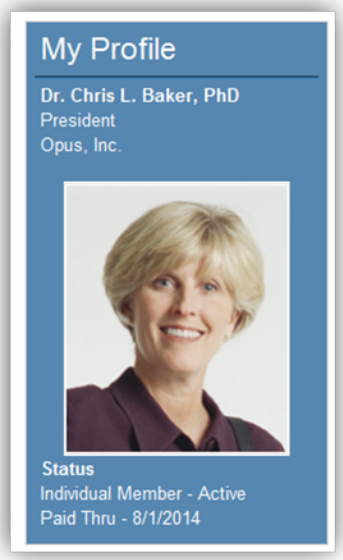
- TitleBarNoBorder – simply removes the bottom border from iPart headers
- CCOGrayBg – applies a gray background to content appearing in CCO tabs



- CalloutBlockType1 – accentuates an iPart whose border is enabled



Aspen:



Birch:

Creating a new theme

Instead of editing a copy of Aspen or Birch, you can also start from scratch when designing your own theme. However, you must include the 00-Reset.css and10-UltraWave.css in your new theme. To do so, begin your new style sheet with these lines:

```
/*##########################################*/
/*     Import UltraWave StyleSheets      */
/*##########################################*/
```

@import url("../UltraWave/00-Reset.css");

@import url("../UltraWave/10-UltraWave.css");

Resources for CSS

- w3schools.com – a great resource for CSS and HTML information and examples.
- CSS3 Generator – a tool to help generate CSS for rounded corners, box shadows, background gradients, and opacity. (Note: CSS3 is not fully supported in all browsers.)

Designing site navigation

Displaying left navigation

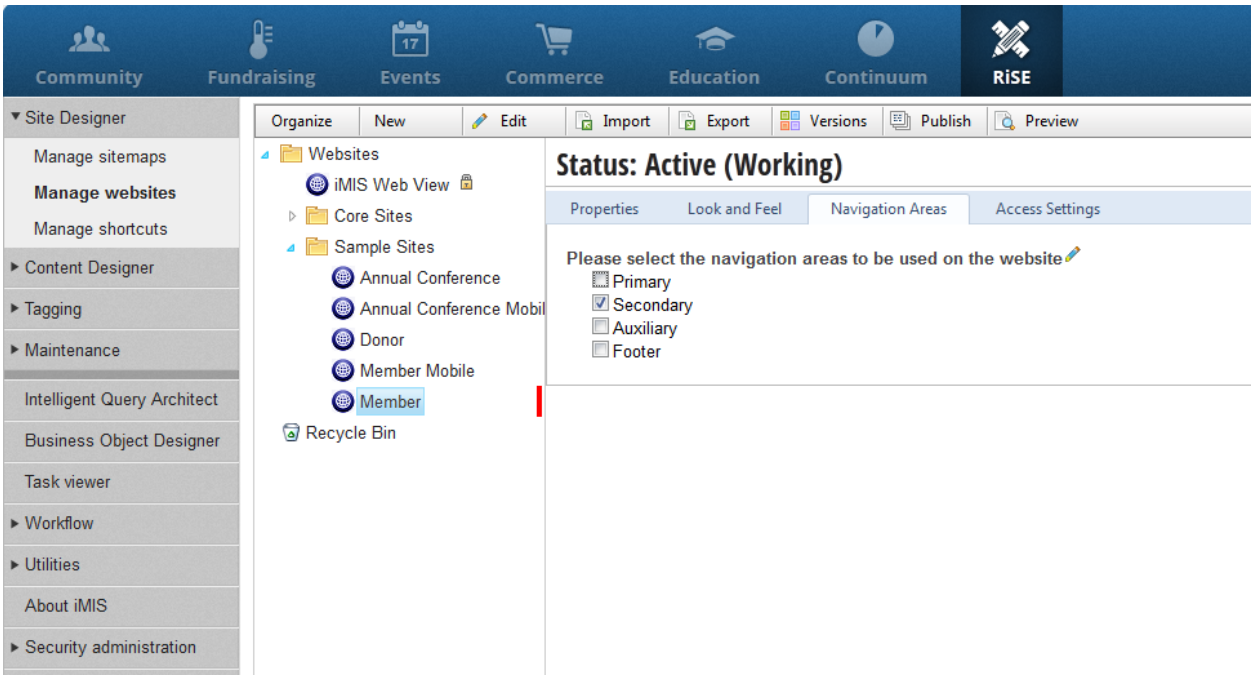
You can display website left navigation in a hierarchical format with a few changes to your theme's master page and skin file.

Do the following to implement left navigation:

Go to RiSE > Site Designer > Manage websites:

1. Define how many levels of navigation to display.

- Select the website.
- Select the Navigation Areas tab and select the Secondary navigation area.
- Save and publish your changes.



2. Edit the website theme's master page.

- Using your preferred text editor, find and open the website theme's master page. Master pages, by default, are located in C:\Program Files\ASI\iMIS\Net\Templates\MasterPages.
- Register the control by adding the following line to the top of the master page, just below the other registered controls:

  <%@ Register TagPrefix="asi" TagName="SubNavigation" Src-c="~/AsiCommon/Controls/Navigation/SubNavigation.ascx" %>
- Add the following scripts to the <script language="C#" runat="server"> section:

  protected override SiteMapNode GetStartingNode()

  {

  return Secondary.GetStartingNode();

  }

  protected override SiteMapNode GetCurrentNode()

  {

```
    return Secondary.GetCurrentNode();
}
```

- Find the masterSideBarPanel div. It should look like this:

```
<div id="masterSideBarPanel" class="yui-b">
    <asp:ContentPlaceHolder ID="SideBarPlaceHolder" runat="server">
      </asp:ContentPlaceHolder>
</div>
```

- Update the masterSideBarPanel div so that it contains the following:

```
<div id="masterSideBarPanel" class="yui-b">


     <asp:Panel ID="SubNavPanel" runat="server" >
         <asp:ContentPlaceHolder ID="PageSubNavigationPlaceHolder" runat="server">
         <asp:Panel id="SubNavHead" runat="server" class="SubNavigationHead">
         <asp:Literal ID="SubNavPanelTitle" runat="server" />
         </asp:Panel>
         <asp:Panel id="SubNavBody" runat="server" class="SubNavigationBody">
         <asi:SubNavigation id="Secondary" runat="server" NavigationPaneCode="2"
           StartingNodeOffset="1" StartFromCurrentNode="true"
           StartingNodeOffsetAutoSet="true" SelectDefaultNode="false" />
          </asp:Panel>
          </asp:ContentPlaceHolder>
        <asp:ContentPlaceHolder ID="SideBarPlaceHolder" runat="server" />
    </asp:Panel>
```

```
</div>
```

- Find the masterWrapper div, and add the yui-t2 class to it:

```
<div id="masterWrapper" class="yui-t2">
```

- To improve JavaScript performance for websites using hierarchical sub-navigation, find the following script:

```
<script type="text/javascript">
    // if there is something in the side bar this converts the layout to 2 columns
    if ($('masterSideBarPanel').children.length != 0) {
      $('masterWrapper').setAttribute("class", "yui-t2 HasSubNav");
    }
</script>
```

- Update that script to the following:

```
<script type="text/javascript">
    // if there is something in the side bar this converts the layout to 2 columns
    if ($('masterSideBarPanel').children.length === 0) {
      $('masterWrapper').removeAttribute("class");
    }
</script>
```

3. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.

- Register the control by adding the following line to the top of the skin file, just below the other registered controls:

  <%@ Register TagPrefix="asi" TagName="SubNavigation" Src-c="~/AsiCommon/Controls/Navigation/SubNavigation.ascx" %>

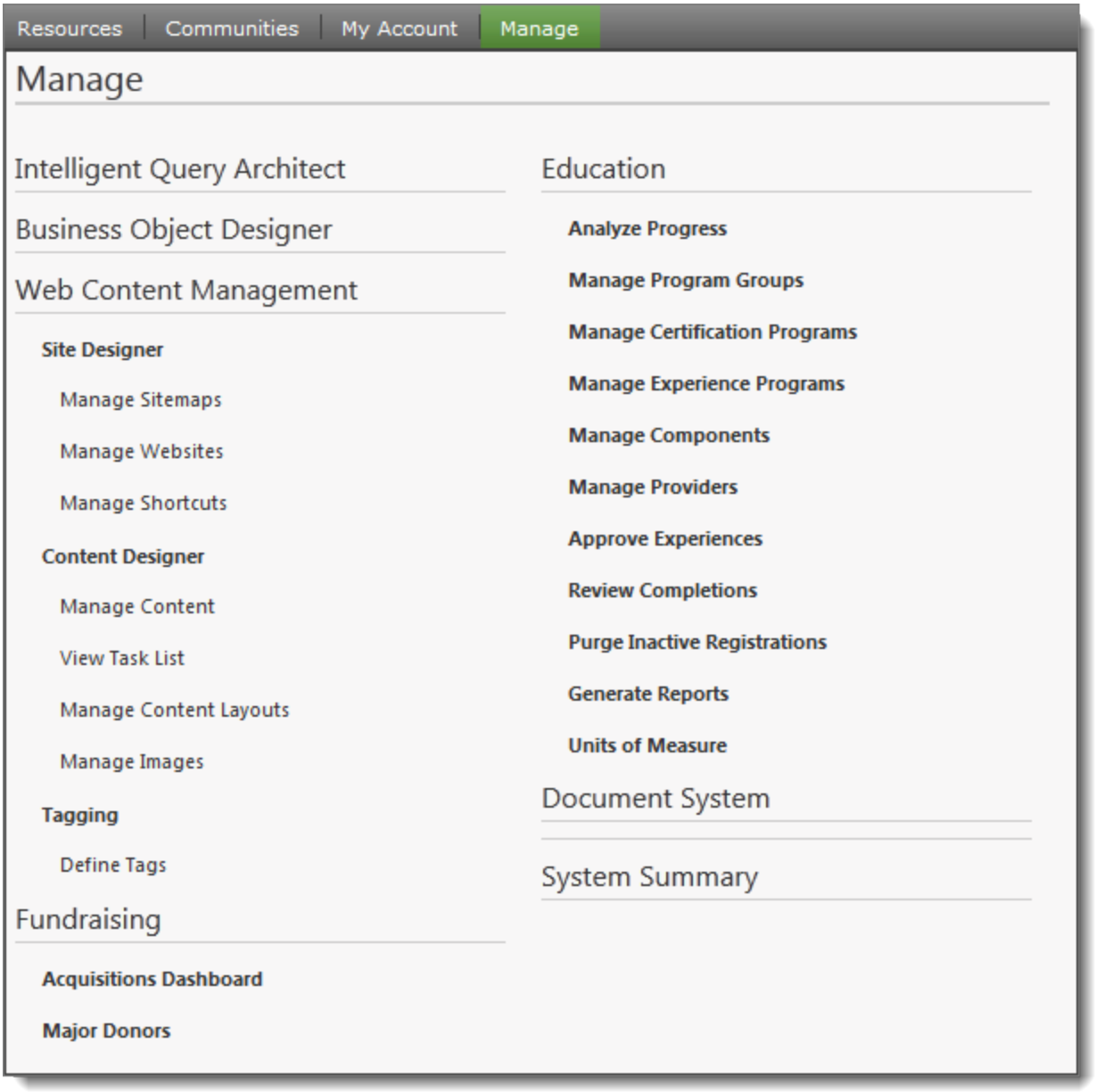
- Just below the section registering controls, add the following line:

  <asi:SubNavigation runat="server" Skin="Aspen" EnableEmbeddedSkins="false" SingleExpandPath="true" ShowLineImages="false" />

- (optional) If you are familiar with skin controls, you can configure how the SubNavigation control behaves using the following properties:
- string NavTreeSkinId – A unique ID for the skin if needed. The default is RadTreeView.
- bool SingleExpandPath – Gets or sets a value indicating if only the current branch of the tree is expanded. The SingleExpandPath property, when set to True, automatically collapses nodes that are not on the path of the currently expanded node. Use the SingleExpandPath property when you need to conserve screen space and make navigating nodes easier.
- public bool ShowLineImages – Gets or sets a value indicating if the tree node line images display or not.
- string Width – Gets or sets width of the control. Specify in pixels (px) or percentage (%) e.g. 500px, 90%.
- bool EnableEmbeddedSkins – Gets or sets a value indicating if the built in skins should be used on the navigation tree.
- int MaxDataBindDepth – Gets or sets the maximum number of levels to bind to the navigation tree.
- bool WrapNodeText – Gets or sets the option to wrap text if it is wider than the trees allowed width.
- bool ExpandAllNodes – Gets or sets the option to expand all of the nodes when the navigation tree renders.

Displaying mega drop-downs

You can display mega drop-downs from your primary navigation with a few changes to your theme's skin file and menu CSS. Mega drop-downs display navigation items within large panels, grouped by level, which reduces scrolling and improves the usability of site navigation.



To implement mega drop-downs

1. Ensure that all navigation items in the sitemap have a value for Content or URL to Link to. Otherwise, the navigation hierarchy may not render properly.
2. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the pageNavR control and update it to add the following property:

  EnableMegaDropDownMenu="true"

- (optional) If you are familiar with skin controls, you can configure how the mega drop-down behaves by altering the following properties:
- EnableMegaDropDownMenu – Enables the mega drop down.
- MegaDropDownMenuShowStartingNode – Displays the parent navigation node as the first item in the mega drop down. Enter true or false.
- MegaDropDownMenuLevelSettingLevel – Defines the navigation level at which the number of columns set for MegaDropDownMenuRepeatColumns starts to take effect. For example, if you set MegaDropDownMenuRepeatColumns="3" and set MegaDropDownMenuLevelSettingLevel="2", then the mega dropdown displays three columns for the second and higher navigation levels, and the first level only has one column.
- MegaDropDownMenuRepeatColumns – Defines the number of columns used to display the navigation.
- MegaDropDownTooltipLocation – This option only applies to tooltips defined for top level navigation items in the primary navigation. When defined, it specifies the location of the tooltip text if a tooltip is defined for that navigation item. Enter either Menu (displays the tooltip directly beneath the top level navigation item) or Append (displays to the right of the navigation text within the dropdown). If you do not define this property, navigation tooltips are not displayed in the dropdown.

3. Edit the theme's menu CSS to tailor the display of the mega drop-down for the theme's look and feel.

- Using your preferred text editor, find and open the website theme's menu CSS file (for example Menu.Aspen.css). Menu CSS files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the MegaDropDownMenu Styling section and edit the styles as needed:

```
/* ############################ */
/*  MegaDropDownMenu Styling  */
/* ############################ */

.RadMenu .rmGroup .MegaDropDownMenuOuter .rmText {
   padding: 0;
   margin: 0;
   width: 600px !important;
}

div.MegaDropDownMenu
{
   background-color: #f8f7f7;
   padding-left: 5px !important;
   padding-right: 5px !important;
}

.MegaDropDownMenuToolTip
```

```
{
   padding: 5px;
}
```

Using image sprites for navigation items

A sprite is a collection of images combined into a single image. Using CSS, you can shift the image around to display only parts of it. The advantage of using sprites is that they reduce the number of server requests to load images (only one is loaded), leading to improved performance.

One way to use sprites in iMIS is for rollover effects on navigation items.

To implement image sprites for navigation items

1. Edit the website theme's skin file.

- Using your preferred text editor, find and open the website theme's skin file (for example Aspen.skin). Skin files, by default, are located in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Find the pageNavR control and update it to add the following property:

  EnableImageSprites="true"

  When enabled, a new class named rmLeftImage is added to root level links in PageNavR.

2. Create the sprite file.

- Using an image editor like Adobe Photoshop, or a free alternative like GIMP, create your sprite by adding the images you want to a single image, like the following:

- Save the sprite to the website theme's image folder.

3. Edit the theme's 99-[theme].css file to define the classes to control the sprite.

- Use a tool like SpriteCow to determine the position values of the images in the sprite.
- Using your preferred text editor, find and open the website theme's 99-[theme].css file, located by default in the theme folders within C:\Program Files\ASI\iMIS\Net\App_Themes.
- Add styles for the sprite. For example:

```
.RadMenu a.rmRootLink.CartLink .rmLeftImage
{
   Background-image: url(images/cartsprite.png);
   Background-repeat: no-repeat;
   Background-position: -1px -1px;
   Width: 48px;
   Height: 36px;
}
.RadMenu a.rmRootLink.CartLink:hover .rmLeftImage, .RadMenu a.rmRootLink.CartLink.rmExapnded .rmLeftImage, .RadMenu a.rmRootLink.CartLink.rmFocused .rmLeftImage
{
   Background-position: -1px -39px;
}
```

The first group of selectors sets the resting position for the image sprite. The second group of selectors defines the hover state and shifts the image when the link is rolled over.

Go to RiSE > Site Designer > Mange websites:

4. Apply the sprite class to the appropriate navigation items.

- Edit the navigation item for which you want to apply the sprite hover effect (for example, the Shop).
- For the CSS Class property, enter the sprite class (for example, CartLink).
- Save and Publish the navigation items.

Styling your website's primary navigation

From http://www.imiscommunity.com/styling_your_website_s_primary_navigation

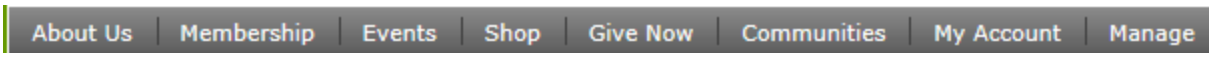
If you customize your website with a new look and feel, you will want to restyle the primary navigation to match the rest of the site. To customize the look of the navigation, you must be using iMIS 15.2 or later along with an UltraWave-derivative theme such as Aspen, Austin, or Birch. In iMIS, the primary navigation bar is built with Telerik RadControls; providing powerful tools for creating dynamic menu systems.

You can change your navigation menu's style by:

- Choosing an out-of-the-box skin provided by Telerik
- Customizing the font or color of an existing Telerik skin using Telerik's Visual Style Builder
- Styling your menu with CSS instead of using the Telerik tools

What is PageNavR?

PageNavR is a control that iMIS uses to display a website's primary navigation. The navigation bar automatically populates with each top-level navigation item, and each sub-item displays in a drop-down list that can expand to multiple levels. PageNavR wraps around a Telerik RadMenu control, so all PageNavR styles are controlled by Telerik's base styles.



What is a .skin file?

Skin files allow you to override default control behaviors in a theme-dependent way. If you set a property for a control in one theme's skin file, it will not affect how the control displays in other theme's skin files.

Take a look at this section of the Aspen.skin file in App_Themes/Aspen:

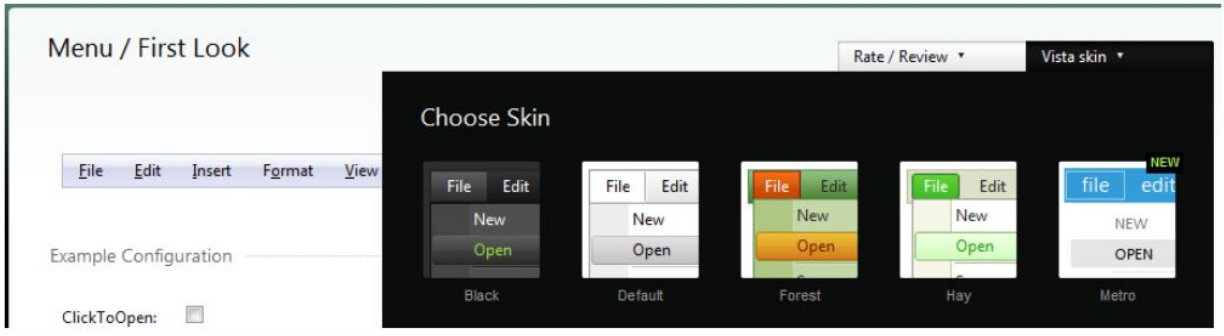
<asi:PageNavR runat="server" Skin="Aspen" EnableEmbeddedSkins="false" EnableRootItemScroll="false" Flow="Horizontal" DefaultGroupSettings_Flow-w="Vertical" DefaultGroupSettings_OffsetX="0" Width="100%"/>

These are just a few of the PageNavR properties available for the control in the skin file. The two properties which affect the navigation bar's style are "Skin" and "EnableEmbeddedSkins."

The "EnableEmbeddedSkins" property determines whether Telerik embedded skins should be loaded as the default. If you are creating your own custom skin, you MUST set this property to "false."

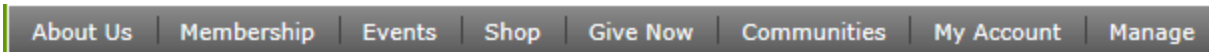
To style the navigation using a skin provided by Telerik

1. Choose an existing Telerik skin to style the navigation menu at [Telerik RadMenu Demo: First Look](#).



2. Change the "Skin" property of the PageNavR control in the theme's skin file to the name of the skin you selected.

3. Change the “ EnableEmbeddedSkins=" property of the PageNavR control to “true." The navigation bar’s styling will change to that of the Telerik skin you selected.

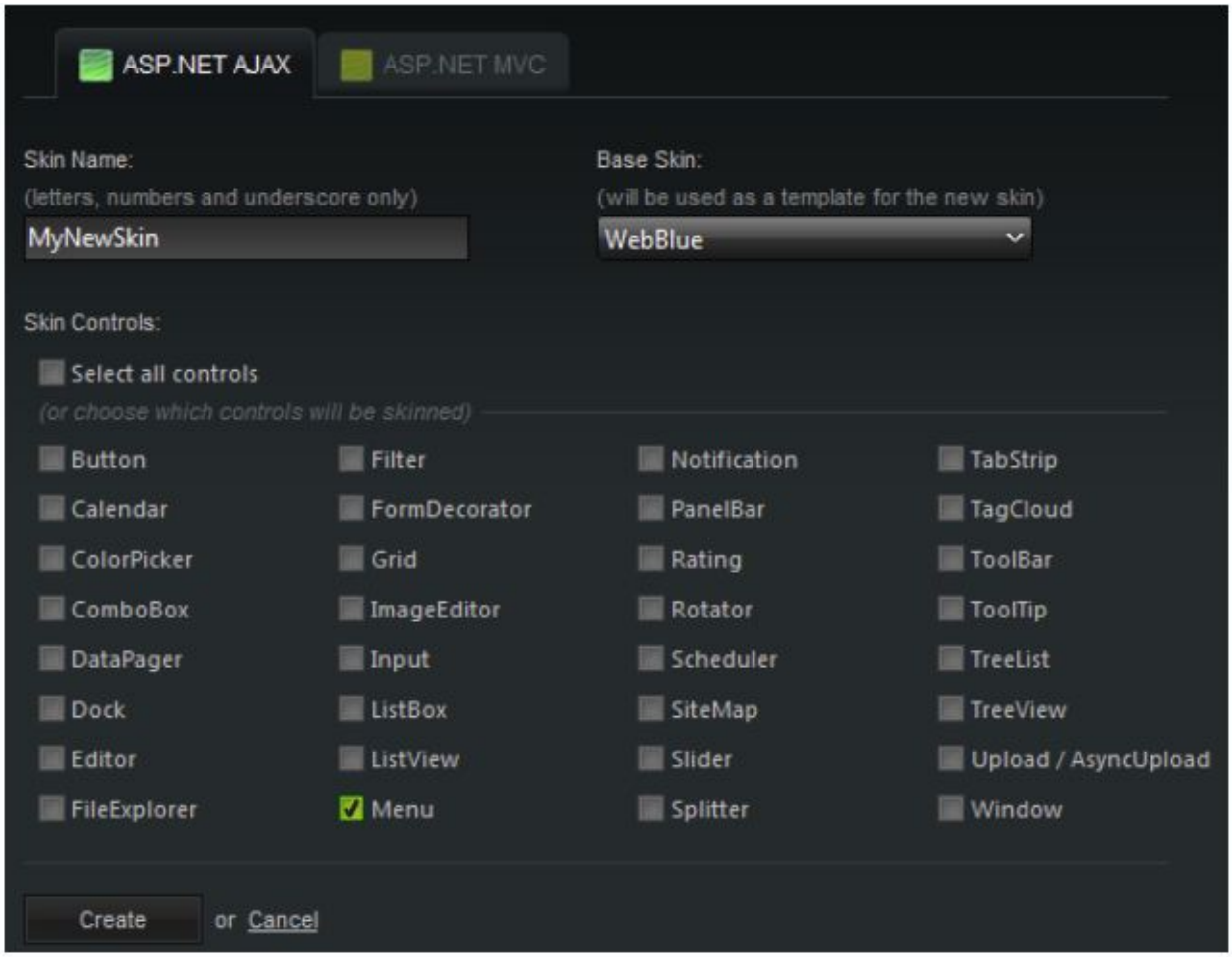


For more information, see MSDN's guide to ASP.NET Themes and Skins.

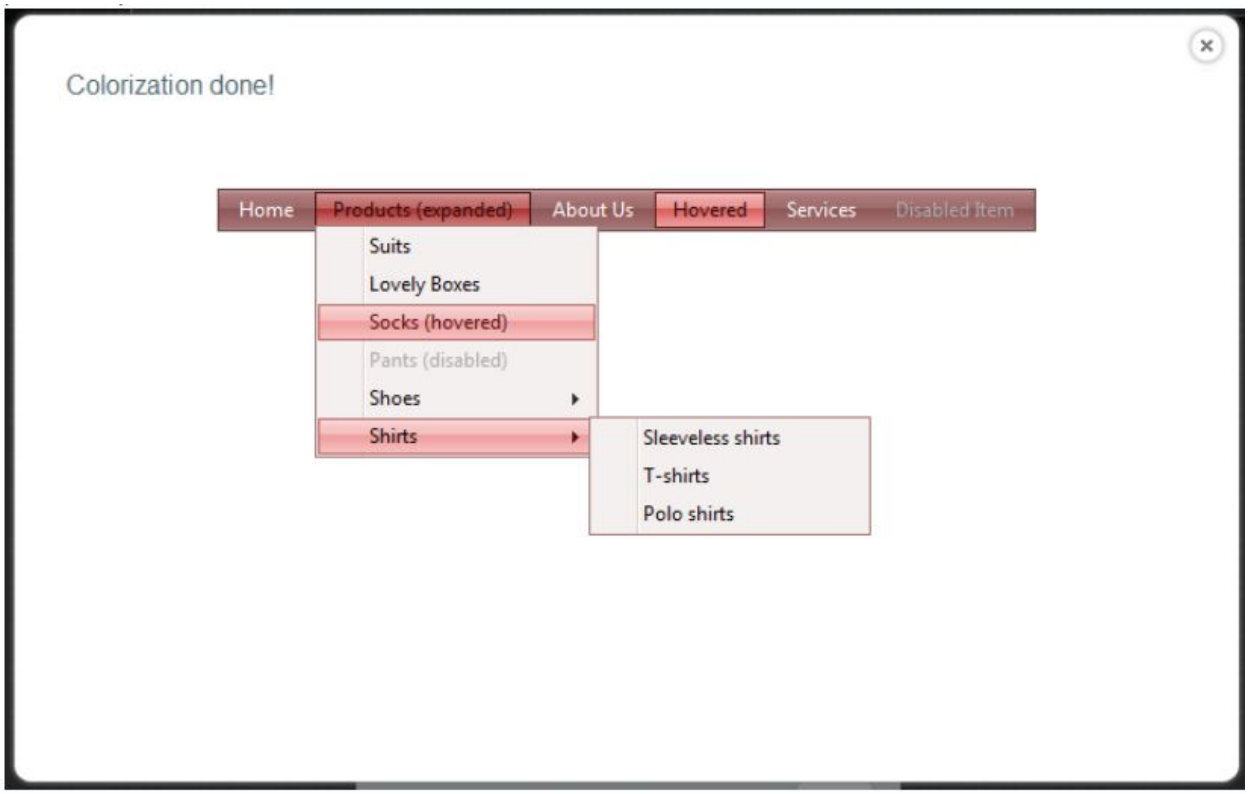
To style the navigation by customizing an existing Telerik skin using Visual Style Builder

If you want to customize the colors or font for a particular Telerik skin, you can use Telerik's Visual Style Builder:

1. Open the Telerik Visual Style Builder and select New Skin. (Note: The Visual Style Builder is in beta. For best results, use Internet Explorer as it is not fully functional in any other browser.)
2. Name your new skin, select your base skin, and check the Menu checkbox.
3. Click Create. Visual Style Builder will open on the Colorize tab.



4. Select your preferred color for the menu. You can fine-tune the hue and saturation of the color on the Shift colors tab in the color window that is open.
5. Click Save to see a preview of your new skin. If you are satisfied with the outcome, you can now download the generated images and CSS and skip to step 9.

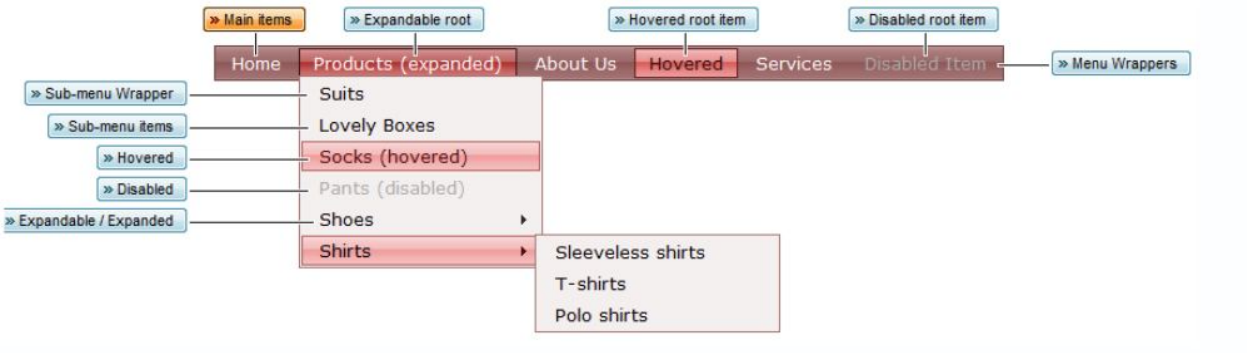


6. For additional customizing, click the Fine-tune tab of the Style Builder itself in the top left.

   Tip: The fine-tune functionality can be unpredictable. Save frequently so that if you don't like the way a change turns out, you can click "load last save" to undo it.

7. Begin with any universal changes you would like to make, such as changing the font on the navigation nodes. Click the Main items bubble to make changes to the font on the main navigation node.

   Each time you make a change the example dynamically responds. Each of the blue bubbles opens a different set of configuration options.



8. When you are finished, click Save and then Download to get the necessary code and images.
9. Copy the unzipped files to your theme's folder. Open the .skin file and set “EnableEmbed-dedSkins” to “false” and “Skin” to the name of your new skin.

   For more information and a video tutorial, see Telerik's Visual Style Builder Overview.

   To style the navigation using CSS

   If you do not like the Telerik provided skins, you can create, with the aid of your browser’s developer tool, your own image-free styling using CSS. If you choose to work by hand, you may find it helpful to start with a working skin, and adjusting to suit your needs.

1. Rename all of the base-level selectors in your working skin file to RadMenu_[Your theme name] .
2. Use your browser’s developer tools to help you figure out how to modify the CSS to get the desired result.
3. In your theme's skin file set “EnableEmbeddedSkins” to "false" and “Skin” to the name of your skin.

   Helpful Links

   Here are some links that may be helpful to you while theming your website:

- w3schools.com: CSS Tutorial
- Creating a unique homepage with CSS and Javascript - includes a very helpful video if you're unfamiliar with browser developer tools
- ASP.NET Themes and Skins
- Telerik RadControl Demos - RadMenu
- Telerik Visual Style Builder
- Telerik Visual Style Builder Overview

Controlling sitemap behavior

This section explains sitemap behavior, including:

content records, iParts, and shortcuts used for searching.

- How to modify the [OverrideLinkText] and [CartItemCount] dynamic navigation items
- Profile pages linked from the Member site's Directory, which uses an ASPX web page to redirect users to a navigation item based on a set of criteria

How search works with navigation

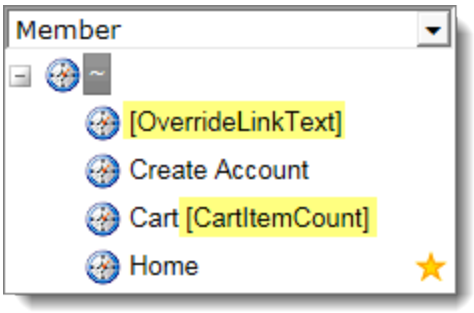
Three elements make search work in the sample sites:

- The search content records: The sample sites use search content records that are dynamically populated with an initial search result set based on a URL parameter value. These content records contain the Common Search|topic=Search (Common Search) iPart and are located within @/iCore folders.
- The pages that display the initial search results: The Shop and Events navigation items are linked to the Search content records. These navigation items have a unique value for the InitialArea URL parameter, which defines the result set generated when the pages are first displayed (i.e. products or events).
- The page displayed when a user clicks a result: The page displayed when a user clicks a search result link are based on the shortcuts defined from Site Designer > Manage shortcuts. The following shortcuts display search result links in the sample sites:

- ItemDetail –The ItemDetail shortcut displays the Item_Detail content record, which uses the Product Display iPart to display the item selected.
- GiftDetail – The GiftDetail shortcut displays the Gift_Detail content record, which uses the Donation Creator iPart to display donation pages selected from search results.
- EventDetail – The EventDetail shortcut displays the Event_Display content record, which uses the Event Display and Event Program Display iParts to display event pages selected from search results.

Modifying dynamic nav items

The default sitemaps include variables that dynamically generate the text displayed for two navigation items. [OverrideLinkText] displays the Full Name of the logged in user by default. [CartItemCount] displays the number of items a user has added to the Cart.



If you want to add new navigation items that use these variables, or if you want to modify the existing ones, keep the following guidelines in mind:

- Navigation areas and master pages – The variables only work in the Auxiliary and Footer navigation areas of websites using one of the Sample Site master pages (or copies of these files) or 1700.master. To specify a navigation area, edit a navigation item and in the Options section, select Auxiliary, Footer, or both from the Show in the following navigation areas options.
- [OverrideLinkText] – You can use this variable on its own or with other text. For example, if you only enter the variable, then only the logged in user's name is displayeds as a link. However, if you enter [OverrideLinkText]'s Profile, and Bob Smith logs in, then Bob Smith's Profile is displayed as a link.

- [CartItemCount] – You can use this variable on its own or with other text, but we recommend that you only use it with other text. Otherwise, when no items are in the cart, nothing is displayed for this navigation item.

  To change the data displayed for [OverrideLinkText]

  The variable [OverrideLinkText] can display any property of the NetContact business object. You can change the property displayed by editing the ContactDetail property in your copy of one of the Sample Site themes, or in 1700.master.

  For example, instead of displaying the Full Name of the logged in user, you may want to display only their First Name. To make this change, edit the ContactDetail property to replace all instances of FullName with FirstName. The result should look like this:

```
public string ContactDetail
  {
    get
    {
      if (ViewState["ContactDetail"] != null)
        return (string)ViewState["ContactDetail"];
      _contact = Asi.Business.Contact.ContactController.Contact(Asi.AppContext.CurrentIdentity.UserKey,
                                                  Asi.AppContext.CurrentContext.
                                                    StatefulBusinessContainer);
      return _contact.FirstName != "GUEST" ? _contact.FirstName : String.Empty;
    }
    set { ViewState["ContactDetail"] = value; }
  }
```

Account and profile pages in the Directory

When users select a result after searching the Member site's Directory, or when they navigate to the account pages, the content record that displays depends on the user's permissions. The rules that determine where a user is redirected are defined in the Party.aspx file, located by default in C:\Program Files\ASI\iMIS\Net.

You can modify the information displayed on the account and profile pages by editing the content records described below from Content Designer > Manage content.

Note: In the Member Mobile site, only simple profile pages are shown for member and organization accounts to restrict the amount of information displayed on small screens.

Page description	Users directed to the page	Content record: @/iCore/Contacts/*	Shortcut
Detailed page for staff to manage member accounts	System Administrators Staff with an authorization level of 1 or higher in Customers	ContactLayouts/Account_Page_Staff	FullAccount
Detailed page for member to manage own account	Contacts selecting their own record	ContactLayouts/AccountPage	MyAccount
Detailed Organization account page	System Administrators Staff Organizations selecting their own record	OrganizationLayouts/Account_Page	OrganizationAccount

Simple (non-editable) Contact profile page	Users who do not have permission to edit the account	ContactLayouts/Profile	Profile
Simple (non-editable) Organization profile page	Users who do not have permission to edit the account	OrganizationLayouts/Organization_Profile	Organization

Tracking your site with Google Analytics

Google Analytics tracks and collects important data on how visitors interact with a website. Google Analytics provides reports on the data collected allowing you to assess whether your website is meeting its goals. This tracking is accomplished by adding a Google Analytics script to the website. A new parameter was added to the Manage websites window if you want to use Google Analytics to track data on an iMIS website.

Do the following to track your site with Google analytics:

1. Create a Google Analytics account: google.com/analytics
   - Configure the account.
   - Google Analytics will provide the code for you to paste in the Manage websites window.
2. Add the script to your iMIS website.

   Go to RiSE > Site Designer > Manage websites:
   - Select the website to which you want to add a Google Analytics script.
   - (Properties tab) Expand the Advanced section and paste the entire script, including the tags, in the Google Analytics script field.
   - Click Save.
   - Publish the website.
3. Visit your Google Analytics account to review the data collected.

Synchronizing content on multiple servers

If you have more than one server hosting the same website, take steps to synchronize all servers that host the website. The following are issues to address:

- Theme files: If you modify the website's CSS or master page, or if you apply a different theme, copy the changed files to all other servers.
- Uploaded images: Copy your folder for uploaded images to all other servers, either by direct FTP or by file copy.

  Tip: This is not necessary for ContentFile iPart attached files, which are automatically copied to remote servers when published.
- Hard-coded image paths: If you use different virtual directories on any of your servers, you need to put a variable in any hard-coded image paths to make them publish correctly on all servers. When including images in a Content Html iPart, modify the default Image URL and replace the server name and virtual directory with [Root]. For example, if the Image URL is .../iMIS/images/mypic.jpg, change it to [Root]/images/mypic.jpg.

  Note: When you edit the Content Html iPart, the image appears as a missing-image red X, but it displays correctly when published.
- Navigation area properties: If you modify navigation area properties (using the Surf-to-Edit link in the Navigation Areas section of the Website Edit screen) you might need to reset the server's worker process to get it to pick up the changes.
- Publishing servers: When publishing content, iMIS will not consider the content successfully published until all relevant publishing servers have finished publishing it without error. That means that if one of the publishing services corresponding to any of the publishing servers listed in RiSE > Maintenance > Publishing servers is stopped or otherwise inactive, content records will remain in the PublishPending state until the publishing service is started or the entry in Publishing servers is removed and the content is republished.

Improving performance for remote servers

The Surf-to-Edit feature of your iMIS content management website might be sluggish on some of your external web servers due to latency in communicating with the iMIS database. For example, it is common for your public-facing web servers to be hosted at a different data center than your iMIS database. You can improve performance by setting up a mirror of the website on your iMIS application server, then directing your frequent Surf-to-Edit users to the appserver's URL for the website instead of using the public URL.

Note: If your Surf-to-Edit users are working at computers that are outside your organization's firewall, they will need VPN access (or access through a terminal server, for example) to connect to the appserver-hosted version of the website.

Changes to the website's content records and navigation items that are made on any server that hosts the website are automatically picked up by every other server when you publish the changes. However, images that are uploaded during a Surf-to-Edit session must be manually copied to all other servers. Additionally, changes that your web admins make to the site's CSS, master page, and other aspects of the site's template on one server must also be manually copied to all other servers.

Improving Surf-to-Edit performance

The following procedure assumes that you already have an external iMIS content management website on which your Surf-to-Edit users are experiencing slow performance. You will be changing the website's definition to also host the website on your application server, then advising your Surf-to-Edit users to use the new appserver-hosted website for their Surf-to-Edit sessions:

4. Modify the website's definition to specify that it be hosted by your iMIS application server as well:

   Go to RiSE > Site Designer > Manage websites:

1. Select the website you want to modify.
2. Click Edit.

3. In the URL(s) pointing to the IIS website root field, enter a comma-delimited list of URLs that point to the root of the iMIS application on your iMIS appserver and to the root of the iMIS content management application that you installed on each external web server. For example, if you already had two external web servers defined for this website, the list should look similar to the following when you have added the URL that points to your iMIS appserver: http://www.my-
   pub-
   lic-
   domain1.or-
   g/wcm/,http://www.mypublicdomain2.org/wcm/,http://www.myiMISappserver.com/iMIS/
4. If using SSL, add the secure addresses to the Secure URL(s) pointing to the IIS website root field in the same order as above.

   Important: Restart IIS whenever you change the Secure URL(s) pointing to the IIS website root setting. Note that localhost is not a valid Secure URL.
5. Click Save to save your changes.
6. Click Cancel.
7. From the toolbar, click Publish.
8. Select Publish children as well? to publish all of the website's navigation items to the new instance of this website on the iMIS application server.
9. Click OK. Note that the website's content records will not be visible on this new instance until a later step. It may take up to 15 minutes for the public and internal sites to reflect the updated navigation.
10. Click Close.
5. Modify the definition of all content folders used by this website to also publish their content records to the new instance of this website on the iMIS application server. This will usually be only the website's root content folder (the one with the same name as the website itself), but your organization might also have some additional content folders that are

used for content shared among several different websites. For each of these content folders, do the following:

1. Go to RiSE > Content Designer > Manage content.
2. Select the content folder you want to configure.
3. Click Edit.
4. From the Publish on Servers dropdown list:

- If the current value is Inherit, do not change the value.
- If the value is Custom, then leave all currently selected checkboxes and also select the checkbox for the publishing server code used by your iMIS application server.

5. Click Save to save your changes.
6. Click Cancel.
7. From the toolbar, select Publish.
8. Select Publish All Items to include all of the folder's content records.
9. Click OK.
10. Click Close. Repeat the steps for each content folder used by the website.
6. Make sure the website's template files exist on the public iMIS content management server, the appserver, and the internal iMIS content management server, if applicable. If the files are missing from any of the servers, manually copy the files to the corresponding locations.
7. Visit your public iMIS content management website and the appserver's website to verify that your changes are successful.
8. Advise your frequent Surf-to-Edit users to visit the URL for the iMIS appserver-hosted instance of the website and avoid using the public-facing URLs.

Complying with the EU's Electronic Privacy Directive

To comply with the EU Directive on Privacy and Electronic Communications, iMIS has added support for your organization to display a pop-up notification informing visitors that cookies are used on your site. This popup also includes a link to a longer sample privacy policy we have provided. You can find more information about this law on the ICO web-site.

Setting up cookie notifications requires that you edit your master page, review (and modify as needed) the privacy policy provided, and add a JavaScript file to iMIS.

To display cookie notification popups

1. Edit the master page of your website (by default located in C:\Program Files\ASI\iMIS\Net\Templates\MasterPages) to add the following items:

- Just under the , add the following divs:

Note: You can edit this content to change the look and feel of the popup to match the design of your site.

```
<div id="EUCookieMessage" style="display: none;">
        <div id="EUCookiewarningBack" style='z-index:999; position:absolute; width:100%;height:100%;background: rgb(0, 0, 0) transparent;background: rgba(0, 0, 0, 0.6);filter:progid:DXImageTransform.Microsoft.gradient(startColorstr=#99000000, endColorstr=#99000000);-ms-filter: \"progid:DXImageTransform.Microsoft.gradient (startColorstr=#99000000, endColorstr=#99000000)\"'>
        <div id="EUCookiewarning" style-='margin:19%;padding:10px;width:62%;height:20%;background:white;color:black'>
        <span id="EUCookiewarningtext"></span>
        <a href="#" class="close-notify">Continue</a>
        </div>
```

```
</div>

</div>
```

- At the bottom of the master page, just before the line <!-- Facebook API is loaded into here -->, add the following JavaScript reference:

```
<script type="text/javascript" src="AsiCommon/Scripts/EUCookieWarning.js"></script>
```

2. Review the sample privacy policy provided as a content record in iSamples/Member/Privacy_Policy, and update as needed for your organization.
3. Create a JavaScript file named EUCookieWarning.js containing the code below, and add it to the Scripts folder (by default located in C:\Program Files\ASI\iMIS\Net\AsiCommon\Scripts).

   Note: The displayNotification function in this file contains the content of the popup notification displayed to users the first time they visit a page in your website. Be sure to update the privacy policy link in this message to point to the content record you want to display for this purpose. You can also edit the rest of the content for the needs of your organization.

```
function getCookie(c_name)

{

var i,x,y,ARRcookies=document.cookie.split(";");

for (i=0;i<ARRcookies.length;i++)

 {

 x=ARRcookies[i].substr(0,ARRcookies[i].indexOf("="));

 y=ARRcookies[i].substr(ARRcookies[i].indexOf("=")+1);

 x=x.replace(/^\s+|\s+$/g,"");
```

```
  if (x==c_name)
    {
    return unescape(y);
    }
  }
}

function displayNotification()
{
if (typeof jQuery('#EUCookieMessage' != 'undefined'))
{
      jQuery('#EUCookieMessage').fadeIn("slow");
      if (typeof jQuery('##EUCookiewarning #EUCookiewarningtext' != 'undefined'))
      {
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("In order for this site to work correctly we need to store a small file - called a cookie - on your computer.<br/>");
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("We use cookies to store information to make your visit to this site richer and to personalize information according<br/>");
            jQuery("#EUCookiewarning #EUCookiewarningtext").append("to your interests. See our <a href=\"iSamples/Member/Privacy_Policy.aspx\" target=\"_blank\">privacy policy</a> for more information on what cookies are, how we use them<br/>");
```

```
        jQuery("#EUCookiewarning #EUCookiewarningtext").append("and how to change your preferences.<br/>");
        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");
        jQuery("#EUCookiewarning #EUCookiewarningtext").append("By continuing to use this site you are consenting to our use of cookies.<br/>");
        jQuery("#EUCookiewarning #EUCookiewarningtext").append("<br/>");
    }
    var closeBtn = jQuery('#EUCookieMessage a.close-notify');
    closeBtn.click(function() {
    setCookie("IMISEUCookieConfirm",null,3650);
    jQuery('#EUCookieMessage').fadeOut("slow");
    return false;
        });
    }
}

function setCookie(c_name,value,exdays)
{
var exdate=new Date();
exdate.setDate(exdate.getDate() + exdays);
var c_value=escape(value) + ((exdays==null) ? "" : "; expires="+exdate.toUTCString());
document.cookie=c_name + "=" + c_value;
}
```

```
function checkCookie()
{
var cookieName="IMISEUCookieConfirm";
var cookieChk=getCookie(cookieName);
if ( typeof cookieChk === "undefined")
 {
 displayNotification();
 }
}

checkCookie();
```

Website doncepts

The terms described in this section explain the basic concepts of iMIS content management.

Concept: master pages and themes

The look and feel of an iMIS content management website comprises the general page layout, colors, graphics, and fonts used for all rendered pages in the website. This look and feel is defined by the design's master page and theme. Master pages and themes are basic elements of ASP.NET websites, and detailed information about developing and customizing master pages and themes can be found in Microsoft developer resources for ASP.NET development such as the Microsoft Developer Network.

- If you want to customize one of the out-of-the-box themes, we recommend that you start with a copy, so that your changes are preserved when you upgrade. See Copying a website theme for more information.

- If you prefer to use your own hand-built master pages and themes, you must first place them in the appropriate MasterPages and App_Themes folders beneath the IIS website root that you plan to associate with this iMIS content management website. This ensures that the master pages and themes are available for selection when defining the properties of the website. You must also ensure that the master pages meet all requirements for compatibility with iMIS content management.

  The master page is an ASP.NET file that specifies the general page layout of all pages in the website. Do not confuse this with the content layout used for the main content area of each page. The master page defines everything that appears on a rendered page, and where they appear, except for two things:

- The rendered content visible in the Main Content Area of each page is controlled by the navigation item for that page. The master page defines only where this content area appears on the website pages, and the content area's exact dimensions.
- The navigation items in the website's sitemap define the actual navigation link text and breadcrumb text shown in the navigation areas. The master page defines only the location, appearance, and behavior of the available navigation areas for the website. Which of the available navigation areas are actually used for the website is defined in the properties of the website itself, and each navigation item specifies the exact navigation areas in which it is displayed.

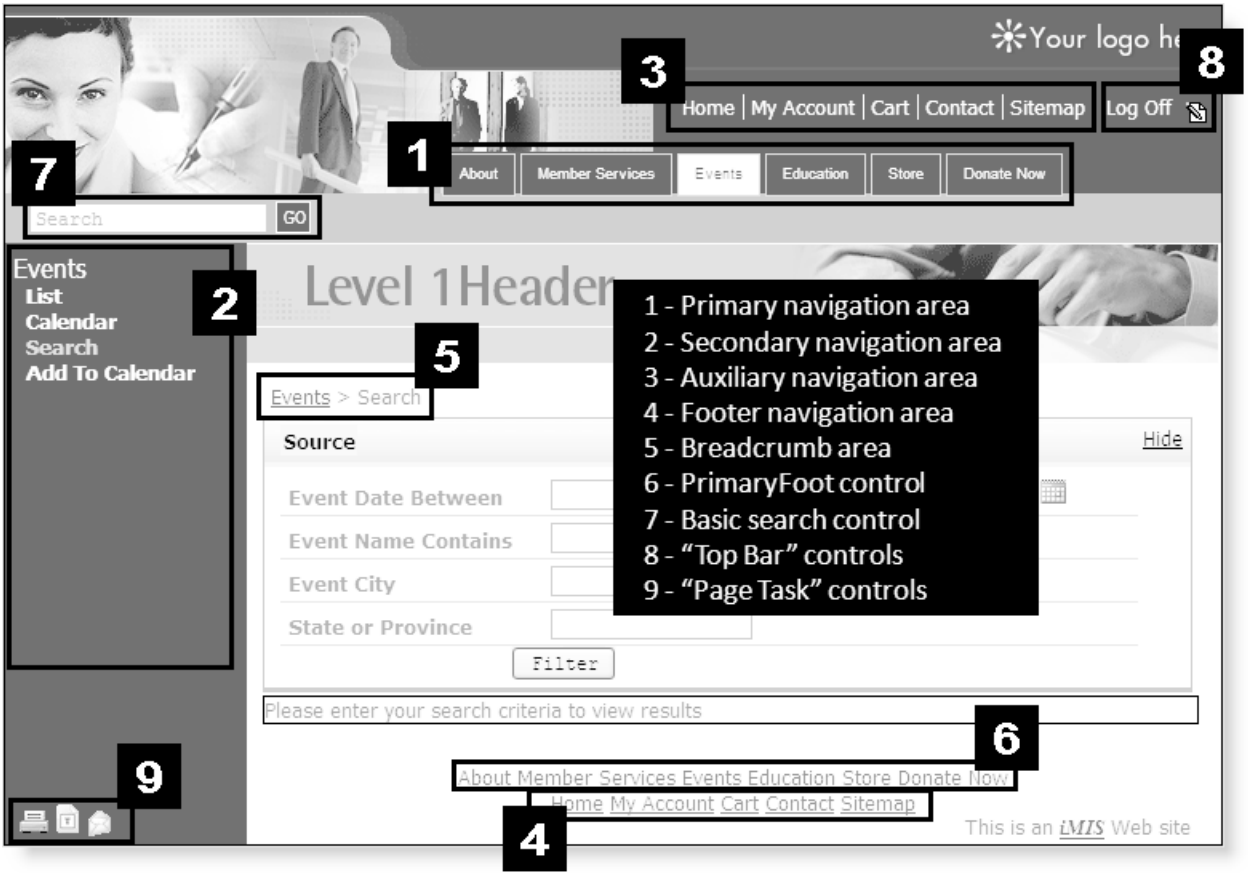
  The theme is a collection of files that specify exactly which colors, graphics, and fonts are used in all rendered website pages, giving them a consistent appearance. The theme comprises all the cascading style sheets used by the master page and available for use in a content layout's iPart zones and iParts, as well as all the graphics used by the master page, as opposed to graphics used in content records. Some themes might also include ASP.NET skin files, which define property settings for ASP.NET Web server controls.

Concept: navigation areas and breadcrumb areas

Navigation areas are special ASI-developed controls used in master pages that create automated lists of navigation links. All ASI-developed master pages are designed to support the four default navigation areas and the breadcrumb area shown in the following

diagram, but you can define up to 30 navigation areas in the system and add the corresponding elements to support those navigation areas to any master page.

The breadcrumb area appears automatically on every site, but you must specify exactly which navigation areas to enable globally for use by the navigation items in the website's sitemap. The four default navigation areas provided with iMIS content management are shown in the following diagram:



When a navigation area is globally enabled in the definition for an iMIS content management website, a checkbox representing that navigation area becomes available for selection when you are defining navigation items in the sitemap for the website. Whether a particular navigation item actually appears in one of the enabled navigation areas of the website is determined by the specific navigation area checkboxes you select for that navigation item when you are defining it.

All master pages fully support the breadcrumb area and all four of the default navigation areas. However, if you modify the definition of any of the default navigation areas in iMIS content management, you might need to revise the master pages to support the changes that you have made.

To integrate your own hand-built master pages with iMIS content management, if you plan to use the breadcrumb area and navigation areas available to iMIS content management websites, you must ensure that you add the appropriate elements to your master page to support them. Similarly, if you define additional navigation areas in iMIS content management, you must modify your master pages to support these additional navigation areas.

Note: The controls that display the Logon/Logoff link and the icon that toggles Surf-to-Edit mode, both of which appear by default at the right of the Auxiliary navigation area, are not a part of the Auxiliary navigation area, so they are unaffected if you remove or move the location of this navigation area.

Concept: publishing iMIS content

When you create or change an existing iMIS content management website, navigation item, content folder, content record, or any other iMIS content management definition object in the Document System and click Save, nothing happens except that iMIS stores a Working version of that object in the iMIS database. It is only when you click Publish that iMIS actually implements the new version of the definition object, replacing the previous Published version of the object with this new Working version and then marking it with a status of Published to indicate that it is now the current active version.

When you publish the various types of iMIS content management definition objects, different things happen depending on what type of object is published.

Note: The following descriptions generally apply to the publishing option Publish Working Items Only. If you select either of the other publishing options, then objects in any state are published.

- Websites – No downstream processes happen other than iMIS content management creates a corresponding sitemap if it is an entirely new website, so that you have a structure

into which you can add navigation items. If you have developed your own custom master pages and themes, the people in your organization who perform website administration should have already placed the necessary files on the servers that will host the website.

- Navigation items – When a browser first requests a website URL from the iMIS application server or an external web server that has been prepared to host iMIS content management websites, the iMIS content management code on that server examines the Published sitemap object in the iMIS database and then builds a corresponding in-memory representation of the sitemap's navigation structure. A timer process then rechecks the iMIS database every five minutes by default to determine whether a newer version of the sitemap object has been published, and, if so, the iMIS content management code on that server rebuilds its in-memory sitemap structure for that website.

  Note: You can change this default five-minute polling interval if desired, but be aware that each polling process consumes a small amount of system resources so there is a performance tradeoff in specifying a more frequent polling interval. To change the polling interval, edit the value of the Sitemap.CachePeriod key (expressed in minutes) in the <SystemParams> declaration in the web.config file for the iMIS application (IIS application \iMIS).

- Content folders – No downstream processes happen other than iMIS checks the status of all descendant content records and sub folders and if iMIS finds any that are currently in a Working state, iMIS automatically publishes them as well. This enables you to spend several days working on a major change to your website content that encompasses many content records, and then publish all those changes in one action by publishing a content folder high enough in the folder hierarchy to cover all the content records that are in a Working state.

  Changes made to the Access Settings of a content folder that are applied to all descendants are saved to the Published descendant content records without the need to republish each record. Security checks to determine whether the rendered version of a content record should be served to the requesting browser are performed by examining the current Access Setting values of the Published content record object in the iMIS database.

- Content records – iMIS checks the value of the Publish on Servers field in the parent content folder to determine which publishing servers should handle the publishing of the content record. iMIS then creates a separate publishing request in the iMIS database for each associated publishing server. Meanwhile, every five minutes by default, the publishing services (AsiPublishing15) installed on every server that hosts iMIS content management websites are polling the iMIS database to determine whether there are any new publishing requests designated for their corresponding publishing server.

  If so, the publishing service examines the Published content record object in the iMIS database and then renders a corresponding .aspx file and places that file in the appropriate location in the server's local file system so that IIS can serve that page to browsers that request the content record's corresponding navigation item link.

  Note: You can change this default five-minute polling interval if desired, but be aware that each polling process consumes a small amount of system resources so there is a performance tradeoff in specifying a more frequent polling interval. To change the polling interval, edit the definition for the corresponding publishing server and specify the desired polling interval in the Frequency field.

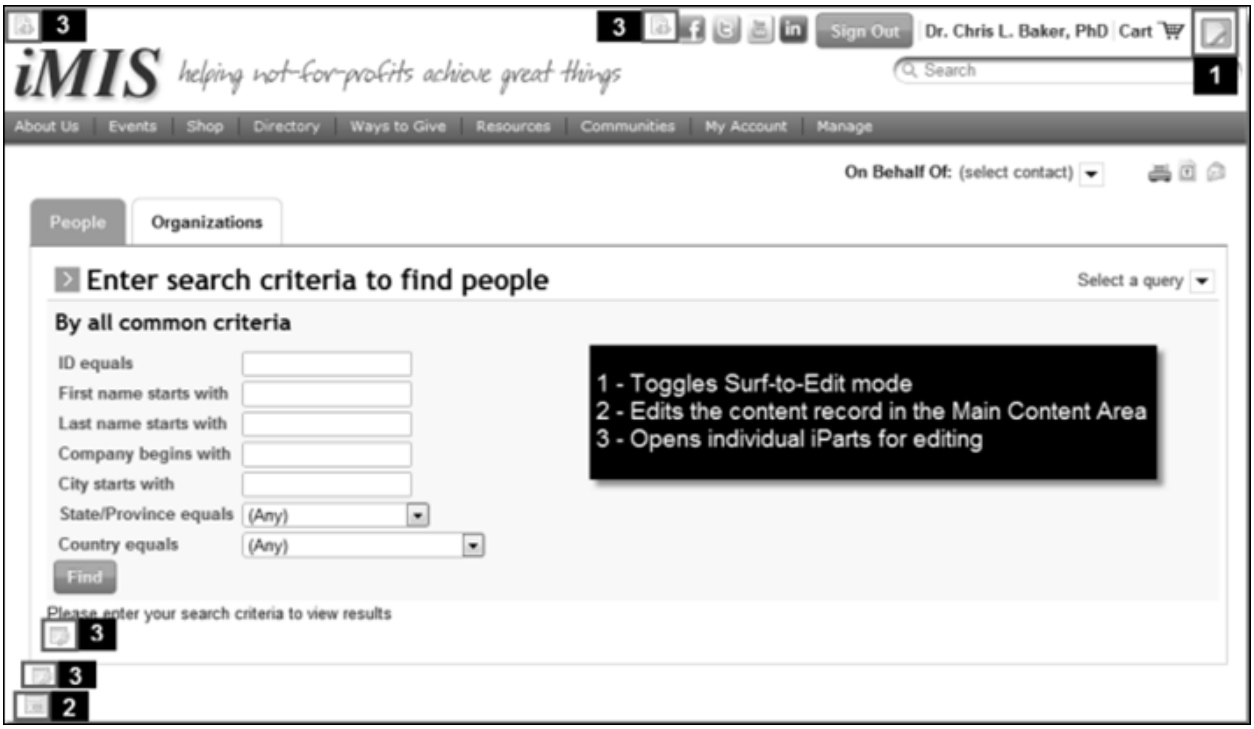
  Note: The iMIS content management configuration field CM.PublishingMaxNumOfAttempts (located in Set up content management > Content designer configuration) determines how many times each publishing service will attempt to process a system publishing request before it flags the request as failed. This prevents overconsumption of system resources if there is a connection issue or other issue that is preventing the publishing service from successfully processing the request.
- Content layouts – No downstream processes happen. When you define a content record, iMIS populates the list of available Page Layouts by examining all the Published versions of content layout objects in the iMIS database.
- Content types – No downstream processes happen. When you define a content record, iMIS examines the Published content type objects in the iMIS database to determine how to display the corresponding iPart when added to the content record.

- Tagged list formats – No downstream processes happen. When you add a ContentTaggedList iPart to a content record, iMIS populates the list of available List Formats by examining all the Published tagged list format objects in the iMIS database.

Concept: Surf-to-Edit

The Surf-to-Edit feature enables you to browse, or surf, to update your content records in their rendered form. You can quickly open a web page's underlying content record (or even a specific iPart within the content record) for editing. When you have saved your changes, you can continue surfing the website and making further content revisions as needed.

Full, Casual and Public users of iMIS can use the Surf-to-Edit feature, provided they are members of at least one content authority group (CAG) and they have been granted the necessary Document System permissions on content records. This is the only way that Casual and Public users can define iMIS content management content.



Concept: user-defined fields (UDFs)

User-defined fields (UDFs) in iMIS content management are created differently, and serve a very different purpose, than user-defined fields in iMIS contact records:

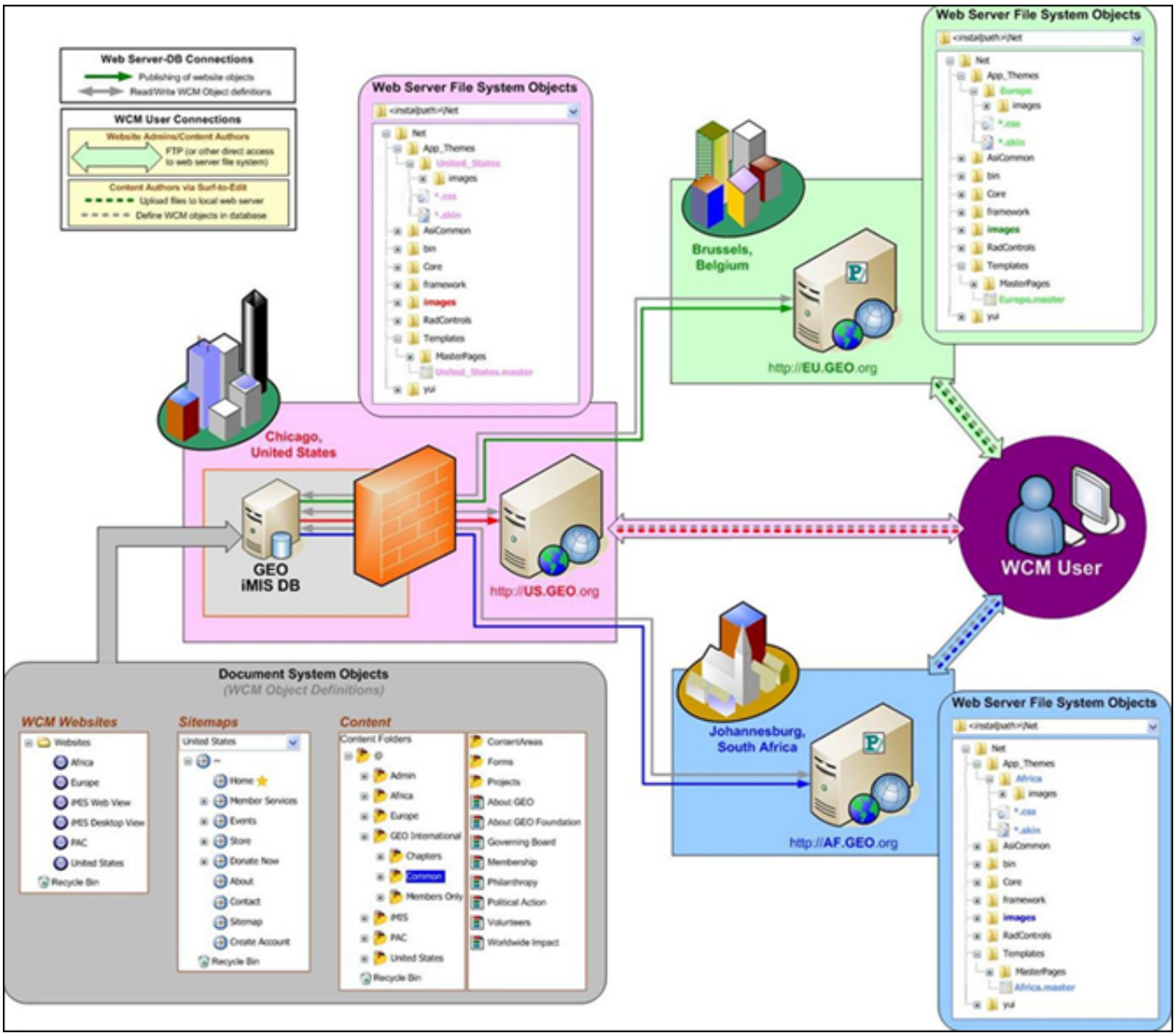
- The UDFs found in iMIS contact records enable you to collect custom information about a contact. These contact UDFs are not available for use in iMIS content management.
- The UDFs found in iMIS content management are primarily useful as a way to capture additional properties of the content in content records, and to provide a controlled list of search criteria for use in iMIS content management only. These iMIS content management UDFs can be used in three ways:
- As a value added to the keywords <META> element in the rendered page for the content record, which enables searches performed through the iMIS content management search engine (but not by typical external web-based search engines) to locate the content record by searching for this value. This behavior is controlled by the Use in Search? property of an iMIS content management UDF.
- As a search filter in AdvancedSearch iParts, applied to the initial result set based on the tags and keywords specified in the search.
- As both filtering criteria and sorting criteria in ContentTaggedList iParts. A date-oriented UDF can be used to filter the initial result set based on the chosen tags, and a different UDF of any type can be used to sort the the final result set.

  Every UDF defined in iMIS content management is added as a new custom property to every content record, and can be displayed in a wide variety of formats, from a simple text field to a drop-down list, to a calendar control, to a set of radio buttons, and so on. In the advanced search panel rendered from an AdvancedSearch iPart, the user-defined field appears exactly the same way that it does in content records. This enables iMIS content management website users to specify UDF values for advanced searches in the same manner that the UDF values are chosen when authoring content. For example, a date-oriented UDF will have a calendar control that makes it easy to select a date.

Concept: websites and web server interaction with iMIS

An iMIS content management website is slightly different from a Microsoft Internet Information Services (IIS) website. While the rendered output of an iMIS content management website provides a total website experience for visitors to the site, a single iMIS content management website can actually be hosted on multiple web servers even though you are only maintaining a single website in your iMIS content management environment. Within the internal structure of IIS, an iMIS content management website is usually maintained as a subset of the iMIS application, but you can configure IIS to host iMIS content management websites as individual IIS applications or even as individual IIS websites.

The following diagram illustrates the connection points between multiple IIS web servers that host iMIS content management websites, the iMIS database, and users.


Web Server-DB Connections
Publishing of website objects
Read/Write WCM Object definitions
WCM User Connections
Website Admins/Content Authors
FTP (or other direct access to web server file system)
Content Authors via Surf-to-Edit
Upload files to local web server
Define WCM objects in database
Web Server File System Objects
Web Server File System Objects
Brussels, Belgium
http://EU.GEO.org
Chicago, United States
GEO iMIS DB
http://US.GEO.org
WCM User
Johannesburg, South Africa
http://AF.GEO.org
Web Server File System Objects
Document System Objects
(WCM Object Definitions)
WCM Websites
Sitemaps
Content

Customer Administration

Committee Management

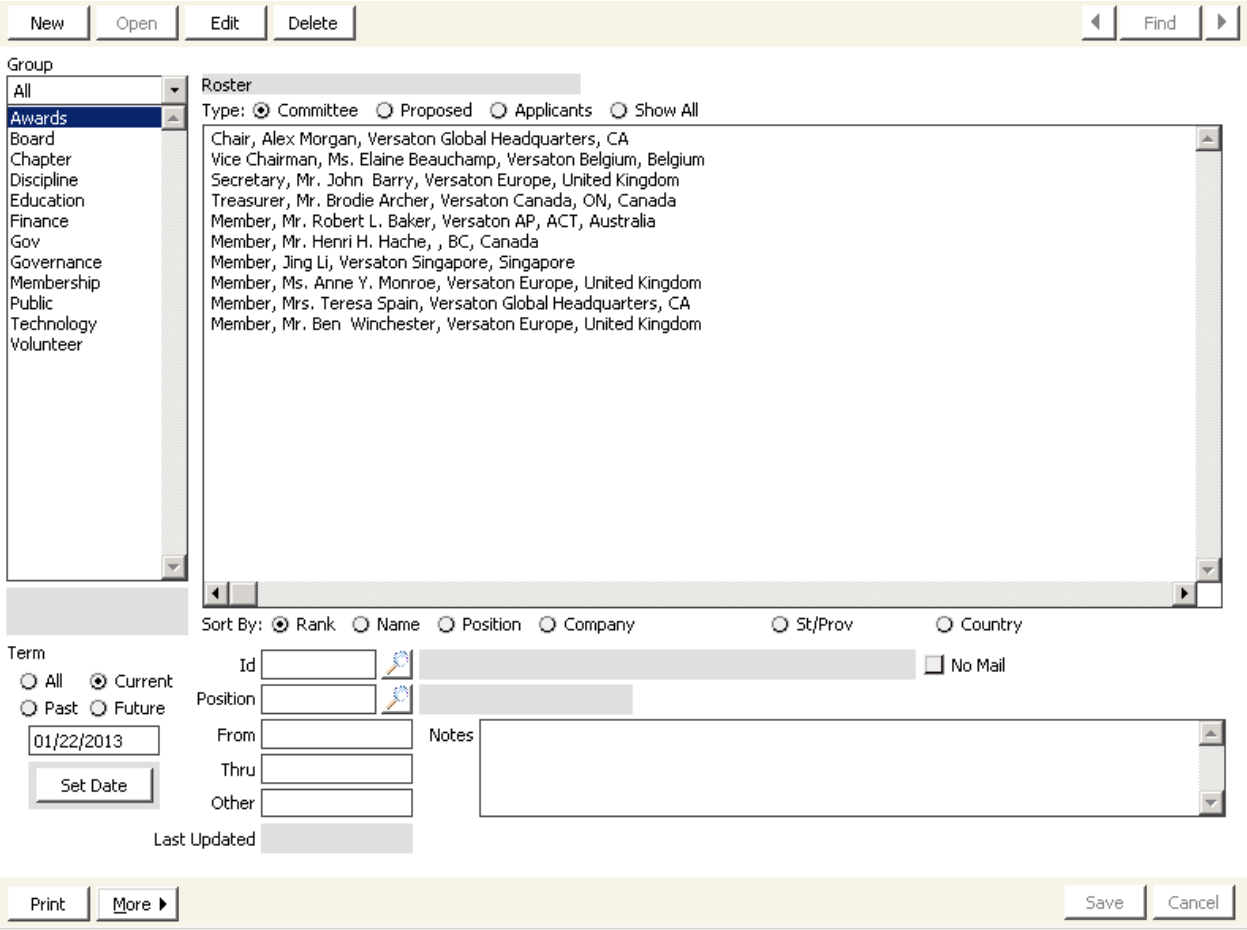
The Committee subsystem of iMIS Customer Management tracks committee members, their respective terms, and the positions they have held. The Manage committees window gives you full access to all committee data maintenance, inquiry, and reporting functions, enabling you to do the following:

- View committee rosters of past, current, and future members
- Maintain a list of members and their positions and terms
- Maintain a list of committee applicants and proposed members
- Create and store minutes on any committee meeting or activity
- Print a detailed roster of past, current, and future committee members and applicants
- Print personalized letters to any committee grouping
- Print labels for any committee list
- Maintain the tables of committee codes and positions

Managing committees

The Manage committees window enables you to assign customers to a committee, edit their assignments, delete assignees, and report this information to other committee members. This window also enables you to enter and track applicants and proposed committee members in advance of actual appointments being made.

Manage committees window



Admin Console: Home > Membership and Dues > Manage committees

Desktop: Customers > Manage committees

Filter by Co ID

The Filter by Co ID option is visible only if enabled during system setup. Although rarely used, this feature enables you to link a committee to the ID of a company record. For example, if you have set up a committee named Awards, and a company has 25 branches and each branch has an Awards committee, you normally would need to create 25 separate Awards committees with each having a slightly different name. Instead, you create 25 company name records that represent your branches.

With Filter by Co ID enabled, you can open the Awards committee and set the filter to work with only one of the 25 branches. A Find window will open so you can locate the company ID to filter by.

Group

The Group field is a drop-down list that enables you to view either all committees or committees that have been assigned to a specific group.

Committees

The Committees field displays the current list of the committee codes that have been defined in the Committee Codes window.

Type

Designates one of the following display filters:

- Committee - All committee members are displayed.
- Proposed - Proposed committee members are displayed.
- Applicants - Committee applicants are displayed.
- Show All - Committee members, proposed members, and applicants are displayed.

Roster

The Roster field displays the currently selected committee's member list (affected by Type and Term choices).

Sort By

Designates one of the following sort orders:

- Rank - Sorts members by the rank assigned to their positions in the Committee Positions window.
- Name - Sorts members alphabetically by last name.
- Position - Sorts members alphabetically by position title.
- Company - Sorts members alphabetically by company name.

- St/Prov - Sorts by the member's Name.STATE_PROVINCE, then Name.LAST_FIRST, both in alphabetic ascending order (A-Z, a-z).

  Note: The State/Province radio button will be labeled according to the value set up in Customer Setup – Address and Notes > State/Province.

- Country - Sorts by the member's Name.COUNTRY, then Name.STATE_PROVINCE, then Name.LAST_FIRST, all three in alphabetic ascending order (A-Z, a-z).

  Term

  Designates on of the following term filters:

- All - Displays all members who have served, are serving, or will be serving on the committee.
- Current - Displays only those members who are currently serving on the committee.
- Past - Displays only those members whose terms have concluded.
- Future - Displays only those members whose terms begin in the future.

  Set Date

  Activates the date field by which member terms are evaluated (date defaults to the current system date).

  ID

  Designates the ID of the currently selected or added member.

  No Mail

  Exempts the committee member from committee-specific label runs.

  Position

  Designates the position the member holds in the selected committee.

  From

  (required) Designates the start of the member's committee term.

Thru

Designates the end of the committee member's term. It defaults to the specified Default Duration (usually 12 months) after the From date.

Other

Designates a user-defined value corresponding to the type or category of educational credit awarded the member, if applicable. The value specified is displayed in the bottom of the member's Activity Detail window if your administrator has defined a prompt for the CEU Type field for the COMMITTEE activity type.

Last Updated

(read only) Shows the last date the record was updated.

Preference

Indicates an order of preference expressed by applicants for more than one committee position. For example, if an applicant wants to be President of a committee but has a second choice of Vice President, create two committee records for the applicant. The first record would have a position of President and a preference of 1. The second record would have a position of Treasurer and a preference of 2. This field is only displayed when Proposed or Applicants is enabled.

Notes

Specifies notes about the individual.

Print

Opens the Committee Reports window from which you can print committee reports.

More

Opens a menu of maintenance choices:

- Minutes - Opens the Minutes window where you can maintain minutes for the active committee. Minutes are accessed by the date that they were stored. You can open the minutes for any meeting and view or transfer them to a letter, report, or other area for

printing. You can open an existing minute's entry to work from or to insert a new set of minutes. Each entry consists of the date and the text of the minutes. All standard data maintenance procedures apply.

- Committee Codes - Opens the Committee Codes window where you can add, edit, and delete committee codes.
- Committee Positions - Opens the Committee Positions window where you add, edit, delete, and assign the rank for committee positions.
- Move to Committee - Assigns the currently selected individual to the currently selected committee as a member.
- Move to Proposed - Assigns the currently selected individual to the currently selected committee as a proposed member.
- Move to Applicant - Assigns the currently selected individual to the currently selected committee as an applicant.
- Check Paid Thru - Checks the currently selected individual's name and linked chapter or area with that chapter's paid thru date. If the selected individual is not linked to any chapter or area, iMIS displays a prompt to notify you.

To assign a member to a committee

To add a member to a committee, you need the following information:

- Customer ID
- Code for the position in which the member will serve
- Date range for the appointed term

1. From Manage committees window, select the committee code that you want the member to be associated with from the Committees field.
2. Select the appropriate type by enabling one of the following options:

- Committee
- Proposed

- Applicants
- Show All

  For example, if you want to add applicants instead of actual committee members, enable the Applicants option before entering the applicant. Otherwise, iMIS assumes you want to enter an appointee.

3. Click New. Your insertion point moves to the ID field.
4. Enter the customer ID of the appointee, or click the lookup icon to select an available value.
5. (optional) Enable the No Mail option to exclude the given appointee from committee-specific label runs.
6. Enter the appointee's position code in the Position field or click the lookup icon to select an available value.
7. Enter the start date of the appointee's committee term in the From field.
8. Enter the ending date of the appointee's committee term. If the default committee duration has been defined by your administrator, you can keep or override this value.
9. Enter any additional information you want to record for the appointee in the Notes field.
10. Click Save.

    To edit a committee appointment

    In the Manage committees window, you can edit any information on a particular appointee except:

- The committee to which the member record is assigned
- The ID associated with the record

  If either the committee or the customer ID is wrong, delete the existing record and insert a new record containing the correct information.

1. From Customers, select Manage committees to open the Manage committees window.

2. Select the committee code from the list in the Committees field (including any necessary filtering selections). Make sure you include a term selection that includes the member's record.
3. Highlight the customer record in the list of committee appointees.
4. Click Edit.
5. Make any necessary changes.
6. Click Save.

To delete an appointee from a committee

1. From Manage committees window, select the committee code from the list in the Committees field. Make sure you include a term selection that includes the customer's record.
2. Highlight the customer record in the list of committee appointees.
3. Click Delete. A system message prompts you to verify the deletion of the selected record.
4. Click Yes.

To change a committee appointment type

After preliminary or final appointment selections have been made, you can change the appointee's status as necessary.

1. From Manage committees window, select the committee code from the list in the Committees field (including any necessary filtering selections). Make sure you include a term selection that includes the customer's record.
2. Highlight the customer record in the list of committee appointees.
3. Select More on the Manage committees window to display a menu of maintenance choices.
4. Select one of the following options:

- Move to Committee to change the member to a permanent appointee
- Move to Proposed to change the member to a proposed appointee

- Move to Applicant to reassign a member to an applicant

  A warning message box is displayed.

5. Click Yes.

   To insert committee minutes

1. From Manage committees window, select the committee code from the list in the Committees field.
2. Click More, and select Minutes to open the Minutes window.
3. Click New.

   Note: The cursor moves to the Date field and automatically populates it with the current date.

4. Enter the date for which you want the minutes to be recorded in the Date field.
5. Enter the minutes of the committee meeting in the Minutes field.
6. Click Save.

   Note: Recorded minutes are listed by date in the Minutes List field of the Minutes window.

   To print committee minutes

1. From Manage committees window, select the committee code from the list in the Committees field.
2. Click More, and select Minutes to open the Minutes window.
3. Select the minutes to be printed from the Minutes List field.
4. Click Print.

Chapter Management

The Chapters subsystem of iMIS Customer Management enables you to track chapter memberships. From the Manage chapters rosters window you have full access to all

chapter data maintenance, inquiry, and reporting functions. This access enables you to do the following:

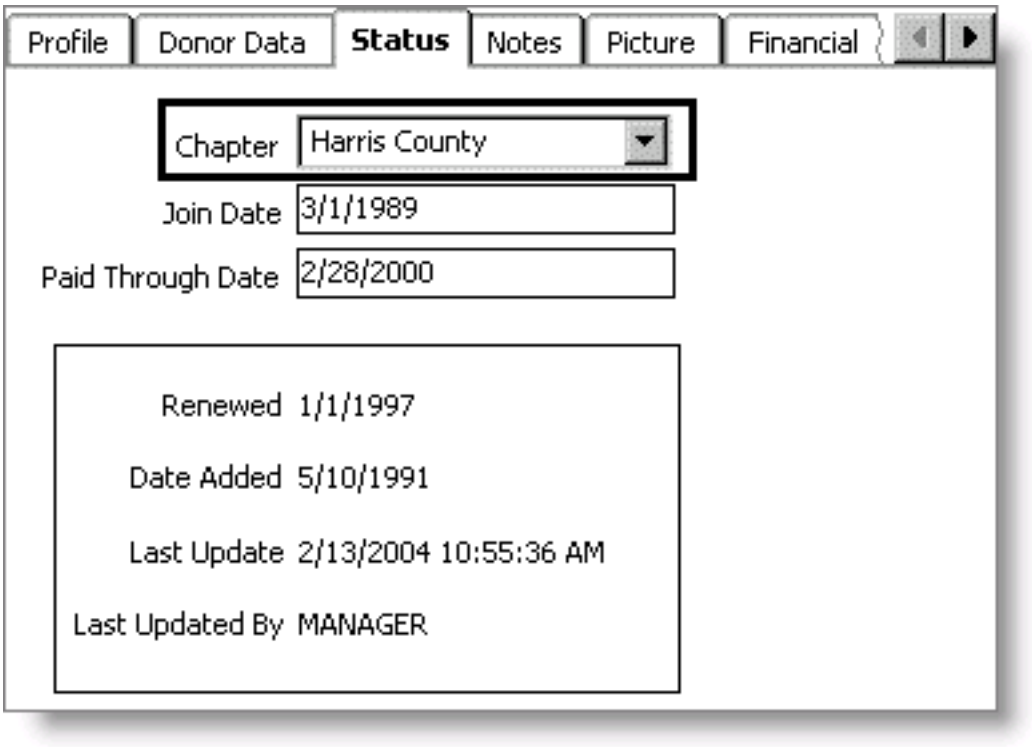
- Activate and view chapter rosters of current, past, or future enrollees
- Maintain a list of enrollees and their terms
- Print a detailed roster of current, future, or past chapter enrollees
- Maintain the tables of chapter codes

The reporting support for Chapter Management includes a full set of rosters and labels, as well as comprehensive statistical reports that reflect member additions and cancellations, movement from chapter to chapter, and other changes in status.

The Manage chapters rosters task list item displays on the Customers task list when iMIS is licensed for CHAPTERS.

Managing chapter members

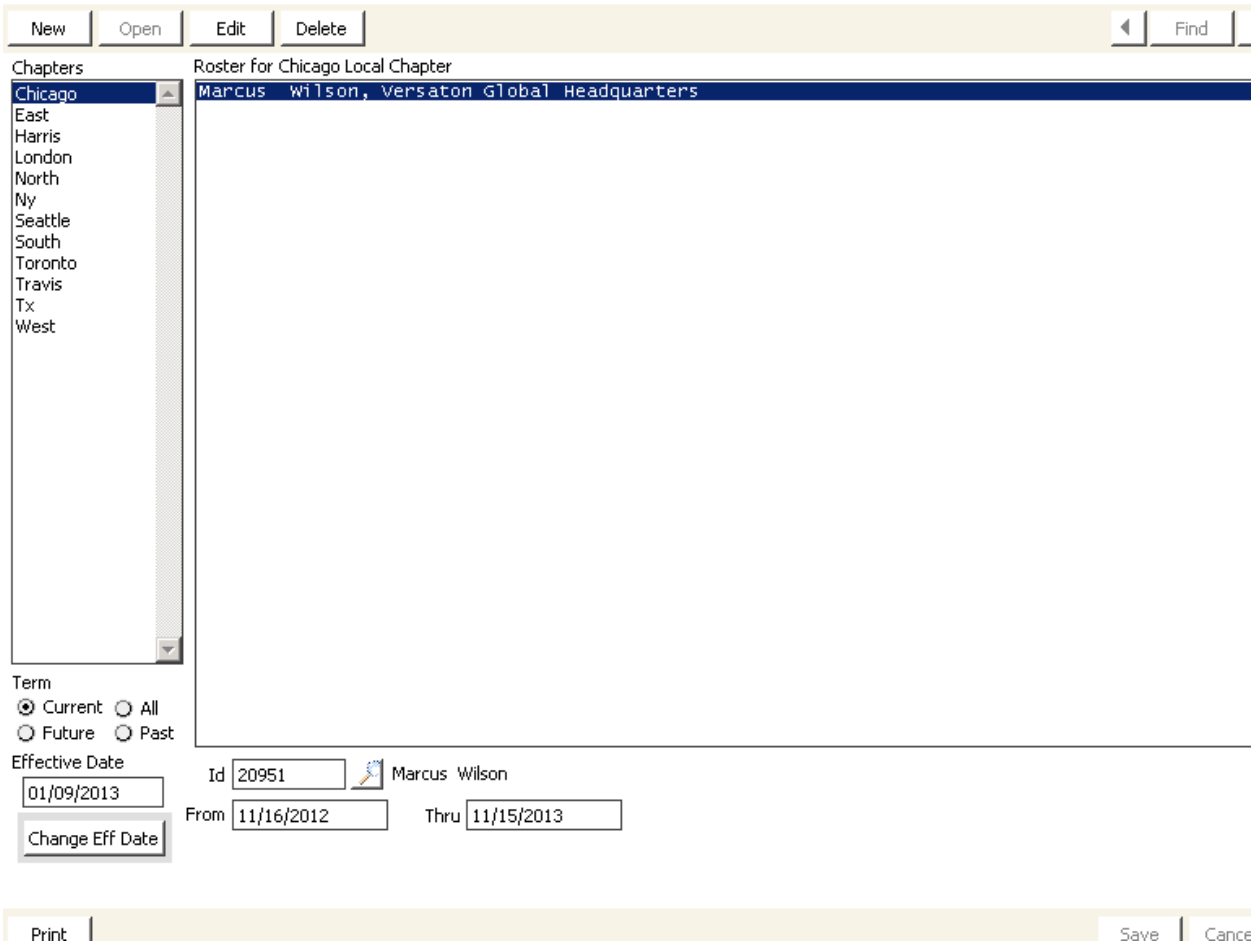
When a customer belongs to only one chapter, you only need to select the appropriate chapter code in the appropriate field on the Status tab on Customers > Manage customers. The label that displays on the Status tab depends on the value you entered in the Chapter Prompt field on the Customer Setup - Basic Options window.



From Customers, select Manage customers, enter/edit a customer record, and select the Status tab

iMIS also supports situations in which you need to enroll customers in multiple chapters, or perform chapter maintenance.

Manage chapters window



Admin Console: Home > Membership and Dues > Manage chapters

Desktop: Customers > Manage chapter rosters

Chapters

Lists the chapters.

Roster for

Displays the members enrolled in the selected chapter for the selected term.

Term

- Current - Enable to display only those members who have terms that include the date displayed in the Effective Date field. The From date must be on or before this date and the

Thru date must be on or after this date.

- All - Enable to display in the roster, all members who have served, are serving, or will be a member of the chapter.
- Future - Enable to display only those members whose term beings in the future (the From date is after the Effective Date).
- Past - Enable to display only those members whose terms have expired (the Thru date is before the Effective Date).

Effective Date

Displays the date upon which the radio button selections are based. Defaults to the current system date.

Change Eff Date

Enables edit of the Effective Date field.

Id

Specifies the member's ID number, or click the lookup icon to select an ID. When you enter the ID, the member's full name displays to the right of the field.

From

Specifies the start date of the term.

Thru

Specifies the end date of the term.

Print

Opens the Chapter Reports window where you can export chapter membership data as well as print rosters and a month-end report based on chapter enrollments, statistical reports, and labels.

To assign a member to a chapter

To add a member to a chapter, you need their customer ID and the code for the chapter to which you are adding the member. Before you can enter lists of chapter enrollees, you must define chapter codes on the Manage chapters window.

1. From Manage chapters window, select the chapter from the Chapters scrolling list to which you want to add the member.
2. Click New.
3. Enter the member's Id, or click the lookup icon to select an ID.
4. Select the appropriate enrollment Term.
5. (optional) Enter the From and Thru dates of the enrollment period.

   Note: When you enter the From date and press Tab, iMIS automatically populates the Thru field with a date one full year from the From date. You can override this value.
6. Click Save.

To edit a chapter enrollment

In the Manage chapter rosters window you can edit any information on a particular enrollee except the chapter to which the member is assigned, and the ID associated with the record.

1. From Manage chapters window, select the chapter from the Chapters list and a term selection that includes the record.
2. Select the record from the roster.
3. Click Edit.
4. Make your changes.
5. Click Save.

To delete a chapter enrollment

1. From Manage chapters window, select the chapter from the Chapters scrolling list and a term selection that includes the record.

2. Select the record from the roster.
3. Click Delete. A message displays prompting you to confirm the deletion.
4. Click Yes.

Acquisition Management

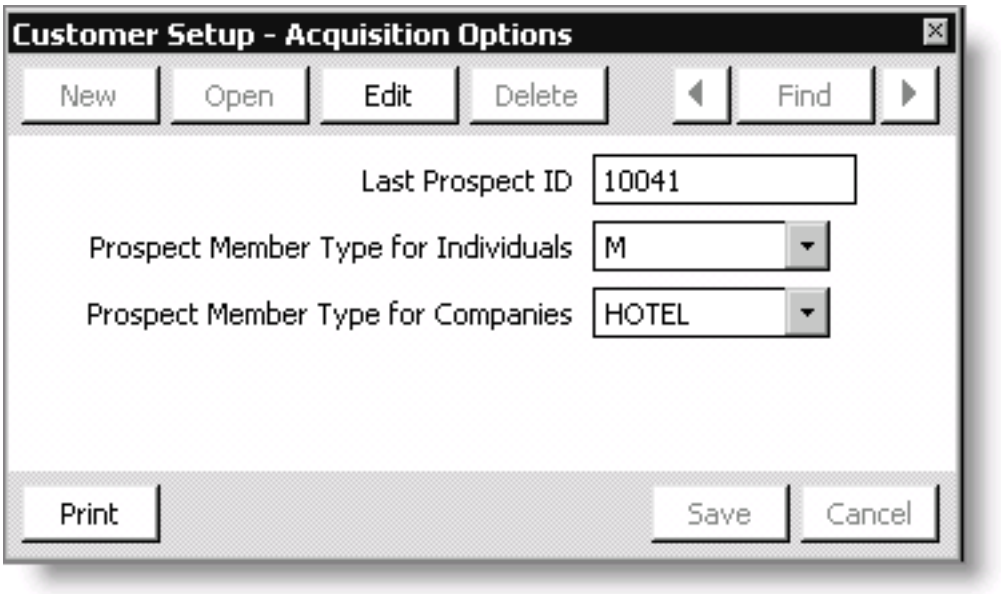
The Acquisition Management feature allows you to import prospects and search an external prospect table from the iMIS global name lookup. For example, if you obtain a list of names and addresses of prospective clients, you can import the data into iMIS and create a mass mail merge to solicit funds from the prospects. Once you locate a prospect record, you can convert the record to a customer record.

Note: Note: You must be licensed for Acquisition Management.

Setting acquisition options

On the Customer Setup - Acquisition Options window you can specify the member type to associate with individual and company prospect records you import into iMIS.

Customer Setup - Acquisition Options window



From Customers, select Set up module > General, click Basic Options, and click Acquisition Options

The Customer Setup - Acquisition Options window includes the following fields and options:

Edit

Used to specify the acquisition options.

Last Prospect ID

(Display-only) The last prospect ID that was assigned

Prospect Member Type for Individuals

Use this drop-down list to select the member type to use when converting individual prospects from the drop-down list.

> **Note:** Note: When you import prospect records into iMIS, the system determines a record is an individual record if the import file contains a value for FirstName, LastName, or FullName.

Prospect Member Type for Companies

Use this drop-down list to select the member type to use when converting company prospects from the drop-down list.

> **Note:** Note: When you import prospect records into iMIS, the system determines a record is a company record if the import file does not contain a value for FirstName, LastName, or FullName.

Print

Used to generate and send a system settings report to your report destination.

To set Acquisition options

1. From Customers, select Set up module > General.

2. Click Basic Options to open the Customer Setup - Basic Options window.
3. Click Acquisition Options.
4. Click Edit on the Customer Setup - Acquisition Options window.
5. Select the Prospect Member Type for Individuals from the drop-down list.
6. Select the Prospect Member Type for Companies from the drop-down list.
7. Click Save.
8. Restart iMIS for your changes to take effect.

Importing prospect records

MC: Medina: Update for Table Analysis removal.

You can import prospect records from a tab-delimited file into iMIS. The prospect import file must contain data matching the following columns. Column values can be blank. However, if the FirstName, LastName, and Organization columns are all blank, the record is deleted during the import process.

- Prefix
- FirstName
- MiddleName
- LastName
- Suffix
- FullName
- Title
- Organization
- Address1
- Address2
- Address3

- City
- State/Province
- PostalCode
- Country
- HomePhone
- WorkPhone
- Fax
- E-mail

> **Note:** Note: The Prospect table cannot be truncated with the iMIS DB Maintenance utility. You must manually truncate the Prospect table.

> **Note:** Note: The column names in the iMIS Prospect table are mixed case. Column names in standard iMIS tables are uppercase.

SQL Server Tools required to import prospect records

When importing a prospect file, iMIS uses the SQL Server utilities osql and bcp. These utilities require that your computer have access to the SQL Server Tools. It is not common for every iMIS client computer to have the SQL Server Tools installed, so to perform this procedure successfully, you might need your system administrator to ensure the following conditions in your environment:

- A computer with SQL Server Tools has the folder with osql.exe (or sqlcmd.exe) and bcp.exe set for file sharing (this is typically the BINN folder, such as C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn).
- An entry that points to that shared folder containing osql.exe (or sqlcmd.exe) and bcp.exe is added to your client computer's PATH variable.

For example, assume your organization has one computer with SQL Server Tools installed in the default location. Your system administrator would need to share the BINN folder on that computer and would need to add a UNC entry similar to the following to your client computer's PATH variable:

\\computerName\sharedPathToSqlServerTools;

Where computerName is the name of a computer in your organization that has the SQL Server Tools installed, and sharedPathToSqlServerTools is the shared file path to the folder that contains the osql.exe (or sqlcmd.exe) and bcp.exe files.

To import a prospect file

1. Select Utilities > Reports and Queries.
2. Select Data Import from the Report Types list.
3. Select Import data into the Prospect table from the Available Reports list.
4. Click Run. A confirmation message displays.
5. Click Yes. The Select import file window displays.
6. Select the prospect import file.
7. Click Open. The Prospect Import - Set Values window opens.
8. (required) Enter the Prefix for Imported IDs. This value must be 1-5 alpha characters. For example, PROSP. (This value displays as part of the ID field in Customers > Manage customers.)
9. (required) Enter the Imported List Code. (This value displays in the Member Type field in Customers > Manage customers.)
10. Click Save. A DOS window displays a confirmation message.
11. Press any key to continue. The file is imported.
12. Press any key again when the file has imported successfully.

Finding and converting prospect records

Finding prospect records is similar to finding customer records. The only difference is you must enable the Include acquisitions in search option on the Search window. Once you find a prospect record, you have the option to convert it to an iMIS customer record.

Customer records in iMIS sort by last name and then first name if there is a last name. Otherwise, records sort by company. When you include prospect in your search and the system finds duplicate names, the iMIS record displays first in the list.

To find a prospect record

1. From Customers, select Manage customers.
2. Open the Search window:

- Click Find; or
- Press Ctrl+F

Note: You can press Ctrl+F to open the Search window (perform a Find) only when the Manage customers window is not in edit mode and you are not in a single-instance, user-defined tab.

3. Select the search criteria from the drop-down list, for example, Name.
4. Enter the search value in the Begins with field, for example, c.
5. Enable the Include acquisitions in search option to include acquisitions from the Prospect table in the search.

   Note: The Include acquisitions in search option is retained on a per-user basis.
6. Click Go. The Results tab is updated.

To convert a prospect record to a Name record

Once you find a prospect record, you have the option to convert the record to a customer record. When a prospect record does not already have an iMIS ID assigned, the data in the prospect record is automatically imported into the Name table and all associated

tables in the same manner as when a new customer record is entered. If the prospect record already has an iMIS ID assigned, the existing Name record associated with the prospect is used. If a prospect record is converted to a customer record during an iMIS operation (for example, when entering a gift or order) and the operation is cancelled, the new customer Name record is retained. Once a prospect record is converted to a customer Name record, the process cannot be reversed.

> **Note:** Note: You must have a Customers authorization level of 3 or higher to convert a prospect record to a customer Name record.

> **Note:** Note: When a prospect record is converted to a customer Name record, the ID number is automatically assigned regardless of the setting of the Auto Assign Member Numbers option on the Customer Setup - Basic Options window.

Duplicate checking for a prospect functions in the same manner as duplicate checking for customers. When you select a prospect record for conversion, a window displays if a duplicate record exists. You can perform the conversion or cancel it.

After you import a prospect record into iMIS, the prospect record is flagged with the associated iMIS ID and cannot be accessed by a Find operation unless an ID search on the prospect ID is performed.

1. From Customers, select Manage customers.
2. Open the Search window:

- Click Find; or
- Press Ctrl+F

3. Select your search criteria.
4. Enable the Include acquisitions in search option and click Go.
5. Double-click a prospect record to convert. The record loads in the Manage customers window in Edit mode.

6. Make any necessary changes to the record.
7. Click Save.

Relationship Management

iMIS Relationships offers you a way to manage relationships that exist between your contact records. It enables you to connect your contact records by connecting individuals to individuals, individuals to companies, companies to individuals, and companies to companies. It works as an extension of iMIS Customer Management, and its thorough integration with Customer Management makes maneuvering through related records clear and efficient.

> **Note:** Note: The Relationships tab displays on the Manage customers window when iMIS is licensed for Relationships.

Relationships features

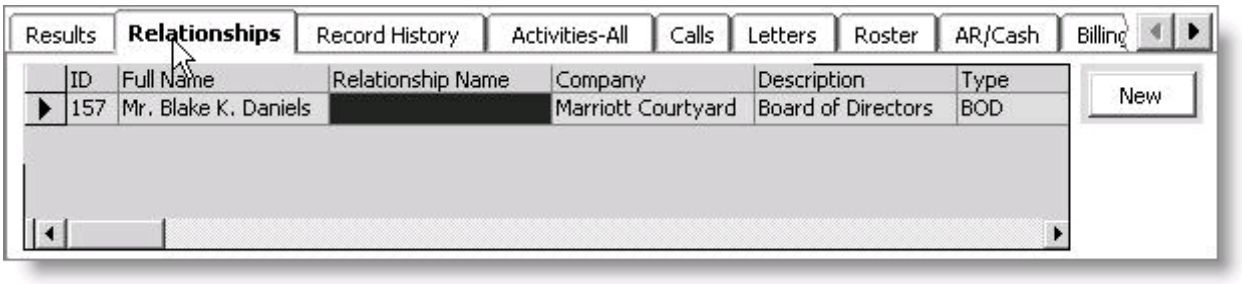
Relationships enables you to accomplish the following tasks:

- Easily manage and view multiple relationships for individual contacts or company contacts
- Place time limits on relationships
- Use relationship codes to specify roles within an organization (for example, President)
- Use relationship codes in contact notifications (for example, one code would specific family members, another code would identify co-workers, etc.)
- Record specific details about related contacts

Managing relationships activity records

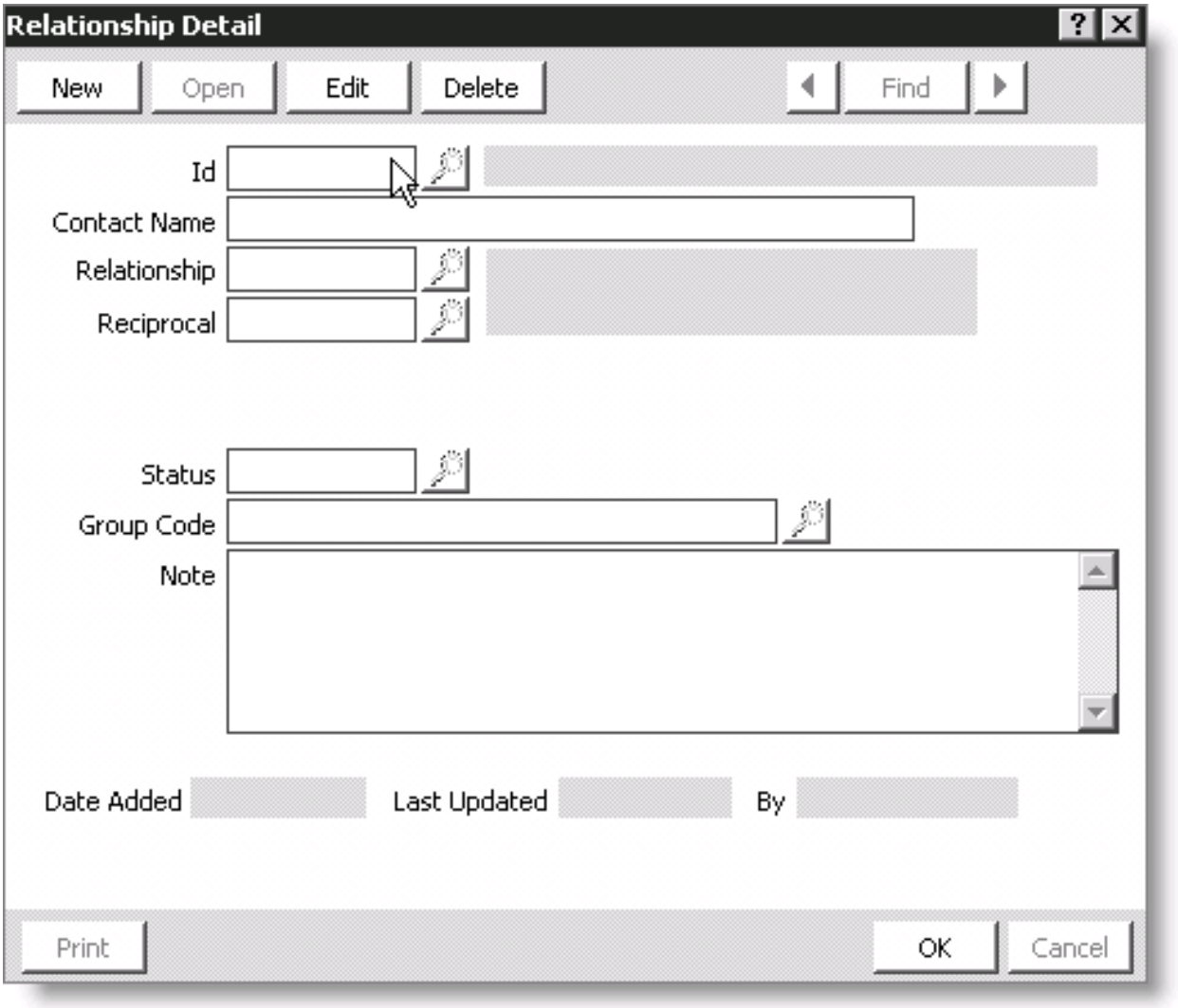
The Relationships tab in the Activity/History area of Customers > Manage customers contains the relationship log for contact records.

Manage customers window - Relationships tab



From Customers, select Manage customers, find customer record, and select Relationships tab

Relationship Detail window



Relationship detail window

Id

Specifies the ID of the contact, or click the lookup icon to search for the contact's ID.

Contact Name

Specifies the name of the contact when the ID is not in the contact database.

Relationship

Specifies the relationship code for the contact, or click the lookup icon to select the relationship code from a list.

Reciprocal

If the relationship code you entered in the Relationship field has a reciprocal relationship with another type, the code for that reciprocal relationship type automatically displays in this field.

Status

Specifies the status of the contact (Active, Marked for deletion, or Suspended), or click the lookup icon to select a value.

Group Code

Specifies a code for the group type (ROLE or DONOR), or click the lookup icon to select a group type.

Note

Specifies any notes you want to keep about the contact.

Date Added

This is a display-only field that shows when a relationship was added.

Last Updated

This is a display-only field that shows when a relationship was updated.

By

This is a display-only field that displays the ID of the person who entered the update to the relationship information.

To add a relationship to a customer record

1. Select Customers.
2. Click the lookup icon to open a contact's record in the Manage customers window.
3. Select the Relationships tab.
4. On the Relationships tab, click New. The Relationship Detail window opens.
5. On the Relationship Detail window, click New.
6. In the Id field, enter a contact ID, or click the lookup icon to select the contact's ID.

   Note: If you're adding a relationship with a contact that does not exist in the customer database, leave the ID field blank and enter the contact's name in the Contact Name field.
7. In the Relationship field, enter the relationship code, or click the lookup icon to select the appropriate code. If the relationship code you entered has a reciprocal relationship with another relationship type, the Reciprocal field auto-populates.
8. (optional) Enter a Title, or click the lookup icon to select a value.

   Note: The Title and Functional Title fields only display when the relationship type entered has the Use Title option enabled in the Relationship types window.
9. (optional) Enter a Functional Title, or click the lookup icon to select a value.
10. (optional) Enter a Status, or click the lookup icon to select a value.

    Note: Status codes are limited to 5 characters.
11. (optional) Enter the From and Thru dates.

    Note: The From and Thru date fields only display when the relationship type entered has the Use Dates option enabled in the Relationship types window.

12. (optional)Enter a Group Code, or click the lookup icon to select a value. (For more information on using Group Codes to display relationships on the Role tab, see the Managing Role Activities section of this chapter.)
13. (optional) Enter any additional information in the Note field.
14. Click Save.

To view an existing relationship

1. Select Customers.
2. Click the lookup icon to open a contact's record in the Manage customers window.
3. Select the Relationships tab.
4. Double-click on the relationship you want to view to open the Relationship Detail window for that relationship.

To edit an existing relationship

1. Select Customers.
2. Click the lookup icon to open a contact's record in the Manage customers window.
3. Select the Relationships tab.
4. Double-click on the relationship you want to edit to open the Relationship Detail window for that relationship.
5. On the Relationship Detail window, click Edit.
6. Make the desired edits. At least two fields must contain information: the Relationship field and either the Id or the Contact Name field.
7. Click Save.

To delete an existing relationship

You can delete relationship records that display on the Relationships tab, provided your administrator has assigned you the appropriate authorization level.

1. Select Customers.

2. Click the lookup icon to open a contact's record in the Manage customers window.
3. Select the Relationships tab.
4. Double-click on the relationship you want to delete to open the Relationship Detail window for that relationship.
5. On the Relationship Detail window, click Delete. A message displays asking you to confirm the deletion.
6. Click Yes to have the record deleted from the tab and the database or click No to cancel the deletion.

> **Note:** Note: You can also delete a record by pressing the Delete key on the keyboard.

Managing role activities

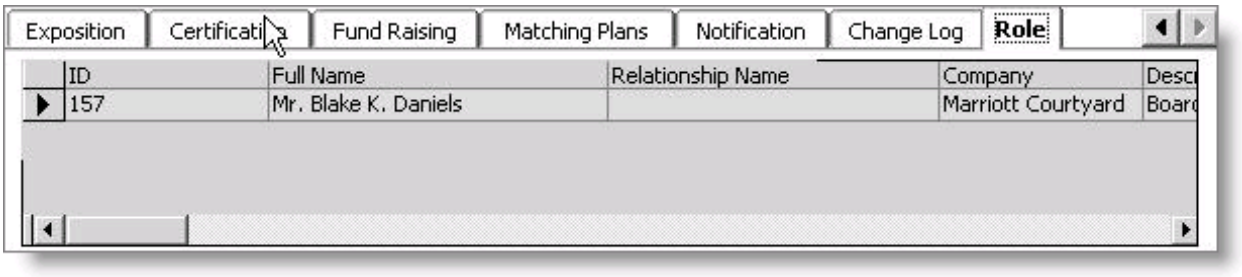
The Role tab is an option available to users licensed for Relationships. The Role tab enables you to see a subset of a contact's relationships, based on relationship type. This is helpful if you have a contact with a large number of relationships, and you want easier access to just a few specific types of relationships for that contact.

> **Note:** Note: All relationships on the Role tab will also appear on the Relationships tab.

The Role tab will display only when the following requirements are met:

- You are licensed for Relationships.
- Your administrator has defined the ROLE code in the GROUP_CODE General Lookup/Validation table.

Manage customers window - Role tab



From Customers, select Manage customers, find customer record, and select Role tab

In order for relationships to appear on the Role tab, they must have the code ROLE entered in the Group Code field on the Relationship Detail window.

To view the Role tab

1. Open a customer's record in the Manage customers window.
2. Select the Role tab. The relationships that have been assigned the ROLE group code display in the tab area.

   Note: If you do not see the Role tab, right-click in the History Tabs section of the page, select Edit Tab Preferences, and make sure that Role is in the Visible History Tabs box.

To display an existing relationship on the Role tab

1. Select Customers.
2. Click the lookup icon to open a contact's record in the Manage customers window.
3. Select the Relationships tab to display the contact's relationships.
4. Double-click on the relationship you want to edit to open the Relationship Detail window for that relationship.
5. Click Edit.
6. Enter ROLE in the Group Code field.
7. Click Save.

To add a relationship that will display on the Role tab

1. Select Customers.
2. Click the lookup icon to open a contact's record in the Manage customers window.
3. Select the Relationships tab.
4. Click New on the Relationships tab to open the Relationship Detail window.
5. Click New on the Relationship Detail window.
6. In the Id field, enter a contact ID, or click the lookup icon to select the contact's ID.

   Note: If you're adding a relationship with a contact that does not exist in the customer database, leave the ID field blank and enter the contact's name in the Contact Name field.
7. In the Relationship field, enter the relationship code, or click the lookup icon to select the appropriate code. If the relationship code you entered has a reciprocal relationship with another relationship type, the Reciprocal field auto-populates.
8. (optional) Enter a Title, or click the lookup icon to select a value.

   Note: The Title and Functional Title fields only display when the relationship type entered has the Use Title option enabled in the Relationship types window.
9. (optional) Enter a Functional Title, or click the lookup icon to select a value.
10. (optional) Enter a Status, or click the lookup icon to select a value.

    Note: Status codes are limited to 5 characters.
11. (optional) Enter the From and Thru dates.

    Note: The From and Thru date fields only display when the relationship type entered has the Use Dates option enabled in the Relationship types window.
12. (required) Enter ROLE in the Group Code field, or click the lookup icon and select Role from the list.
13. (optional) Enter any additional information in the Note field.
14. Click Save.

Customers: Set up tables

To derive the most benefit from the iMIS Customer Management system, you need to customize it to meet the unique requirements of your organization. A large part of the iMIS Customer system is customized through its system tables, which support customer data entry and processing. Once built, these tables supply pertinent information to iMIS about your organization's processing requirements. These tables fill the following important roles:

- Data validation - Most of the tables verify specific data elements during data entry. For all fields or data elements for which a supporting table exists, iMIS performs a look-up and refuses any codes not found in the table.
- Clarification - Most tables provide full descriptions of the codes to which they correspond, which display on windows and print on reports.
- Processing controls - Some tables have characteristics that guide or alter iMIS's processing, let you activate features under a certain set of circumstances, or help you establish data organization and hierarchy.
- Typing shortcuts - To keep keystrokes to a minimum, some tables enable expansion that replaces codes with expanded text.

iMIS's tables are powerful and important elements of your customized system. Building these table entries in line with your processing needs is an important prerequisite to beginning live operations with customer data.

iMIS table layout

The Name family of tables holds information about customers, prospects, subscribers, and any other individuals or companies for whom you want to keep information. These tables are as follows:

- Name
- Name_Address
- Name_Fin

- Name_Demo
- Name_Indexes
- Name_Note
- Name_Picture
- Name_Log
- Activity
- Lookup and Validation Tables
- Customizer (such as Demographics)

  Name

  For each name record in the Name table, there is always a corresponding record in the Name_Address and Name_Fin tables. The Name table consists of the following:

- Primary Name (individual or company)
- Category and Status
- Standard Addresses (first three)

  Name_Address

  The Name_Address file contains an unlimited number of addresses for each record in the Name file.

  Name_Fin

  The Name_Fin file contains financial and other associated data on your customers. ID is the primary key that references back to the Name table.

  Name_Demo

  The Name_Demo file contains user-defined fields, check box fields, and list string fields. You can customize these fields with your association's demographic data.

  Name_Indexes

This file is automatically populated by iMIS and contains index information based on user-definable indexes that were created during Customer module setup.

Name_Note

The Name_Note file contains optional note fields specified for a customer.

Name_Picture

The Name_Picture file contains bit map images of customers.

Name_Log

The Name_Log file stores a log of the changes made to the database and who made the change. You have the ability to customize the information you want to store.

Activity

The Activity file contains historical records for various modules in iMIS:

- Committee Management
- Billing
- Fundraising
- Events
- Order Processing

Items that are included in this file are customer history information such as event attendance, billing payments, products ordered, and user-defined items such as a call log.

Lookup and validation tables

During system setup, your System Administrator must set up a number of small tables to provide lookup choices and validation (see "General lookup/validation tables") during data entry for coded fields such as committees, chapters, and customer types.

Customizer tables

The iMIS Customizer lets you create many user-defined fields, windows, and tables during module setup. The user-defined windows make it easy to store and access demographics and other customizable data. To access the Customizer, from Customers, select Set up module > General, and click Additional Windows.

Building tables guidelines

While the number and types of data elements or fields that compose a table entry vary from table to table, they all contain two similar definition fields, the code and a longer description. The code is usually an all upper-case abbreviation that represents or corresponds to the longer table entry description. For example, in the table of states, the standard 2-character abbreviation (TX) is the code, and the state name (Texas) is the description.

The code is a critical field and is:

- The primary access key for the table entry through which the table entry is stored and retrieved
- A validation check against input to the field it supports

In most fields, iMIS only lets you enter or select a code that exists in a table entry definition. In a field referencing the STATE_PROVINCE table, for example, iMIS would reject the code “TT” as not being a valid table entry.

In assigning codes, follow these guidelines:

- Assign meaningful codes that best represent the description.
- Make the codes long enough to be unique in the table but keep them as short as possible.
- Do not use spaces, apostrophes ('), quotation marks (“), or special characters other than underscores.

Using international address formatting

International address formatting enables you to format and store up to 256 different address layouts. These address layouts can be formatted to reflect the address layouts that are used by different countries, and they can be used in iMIS reports.

International address formatting in iMIS reports

International address formatting requires reports in all modules to use the FULL_ADDRESS, Name.FULL_ADDRESS, Name_Address.FULL_ADDRESS, Orders.FULL_ADDRESS, or Order_Badge.FULL_ADDRESS fields rather than a concatenation of the individual address fields.

These fields are calculated based upon the address format associated with the Country name in the Name Address record. Whenever FULL_ADDRESS is calculated, it is built based upon the appropriate address format.

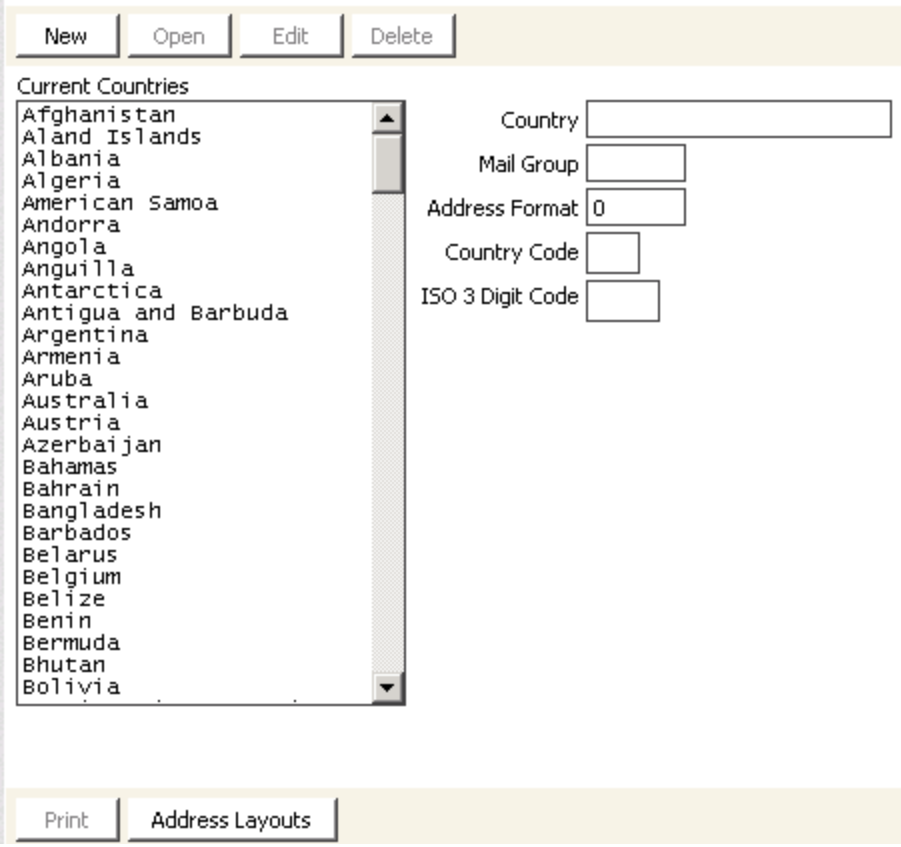
If international address formatting is set up, these FULL_ADDRESS fields are calculated based upon the address format associated with the Country name on the Name Address record. When a new record is inserted into the database, a new ASI stored procedure called sp_asi_AddressUpdate calculates all FULL_ADDRESS values based upon the country specific address formats.

To update the FULL_ADDRESS fields for existing records in the database, you will need to execute the 'Run AddressUpdate' script (select Utilities > Reports and Queries > Table Maintenance). This script calls the ASI AddressUpdate stored procedure that recalculates the FULL_ADDRESS fields based upon the appropriate address format.

If you have to run the 'Rebuild Name_Address Pointers' script for any reason, please note that you will also need to run the 'Run AddressUpdate' script in order to rebuild FULL_ADDRESS based upon the international address formats.

Set up country names window

The Set up country names window is used to add country records to the Country_Names table. The records entered in the Country_Names table then are linked with the appropriate address formats that are stored in the Country_Addr_Layouts table.



Admin Console: Configure > Membership > Set up tables > Set up country names

Desktop: Customers > Set up tables > Country names

Current Countries

Lists the current countries.

Country

(required) Enter the country name in this field (Country_Names.COUNTRY).

Mail Group

This field is reserved for future use (Country_Names.MAIL_GROUP).

Note: Note: The Mail Group field is used in the Advanced Subscriptions module for reporting purposes. You do not need to enter anything in the Mail Group field if you do not intend to separate by mail group in the Advanced Subscriptions module.

Address Format

Displays the Address Format assigned to the country (Country_Names.ADDRESS_FORMAT).

Country Code

Designates the two letter code that stands for this country.

ISO 3 Digit Code

Designates the ISO 3 digit code that stands for this country.

Address Layouts

Opens the Country Address Layouts window to view the address format that is assigned to the country.

The Country table is a combination validation/expansion table for the Country field used for customer addresses. You need to specify values, either abbreviations for expansion and/or for full country names, for all the countries in which your customers may maintain a residence, a mailing address, or a billing address.

Address layouts

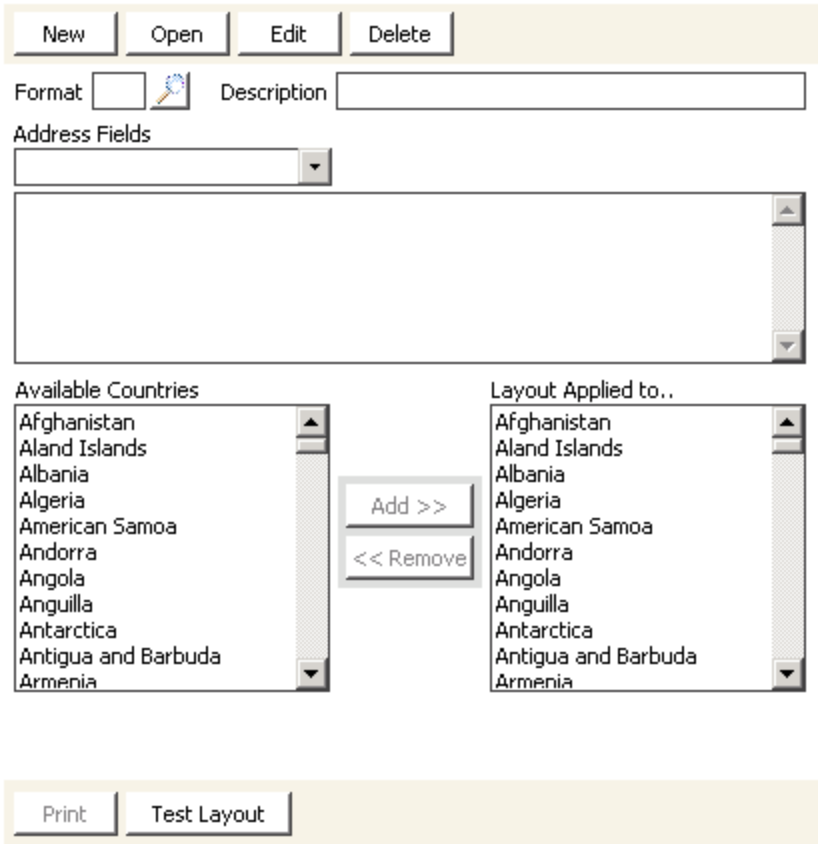
iMIS ships with the following address formats predefined for specific countries. For example, format 12 is applied to Bulgaria, format 13 is applied to Japan, and format 14 is applied to Korea. We recommend that you review these formats to be sure that they fit your business needs. If necessary, you can modify the formats (for example, change the format that applies to a country). For countries that have not had address formats applied to them, you will need to format address layouts and apply them to the countries.

0	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]CITY[C][S]STATE_PROVINCE[S][S]ZIP[N][U]COUNTRY
3	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]CITY[N][U]ZIP[N][U]COUNTRY
4	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N]

	[U]ZIP[S][U]CITY[N][U]COUNTRY
5	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[N]STATE_PROVINCE[N][U]COUNTRY
6	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[S]STATE_PROVINCE[N][U]COUNTRY
7	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]CITY[S][U]ZIP[N][U]COUNTRY
8	CITY[N]ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] ZIP[N]STATE_PROVINCE[N][U]COUNTRY
9	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] CITY[N]ZIP[S][U]COUNTRY
10	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] ZIP[S]CITY[N]STATE_PROVINCE[S]COUNTRY
11	ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N] [U]ZIP[S][U]CITY[N][U]COUNTRY
12	COUNTRY[N]STATE_PROVINCE[N]ZIP[S]CITY[N] ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N]
13	COUNTRY[N]ZIP[S]STATE_PROVINCE[S]CITY[N] ADDRESS_1[N]ADDRESS_2[N]ADDRESS_3[N]
14	COUNTRY[N]ZIP[N]STATE_PROVINCE[S]CITY[S] ADDRESS_1[S]ADDRESS_2[N]ADDRESS_3[N]

Set up country address layouts window

The Set up country address layouts window is used to enter format codes, to modify existing format codes, to format address layouts, and to apply formatted addresses to specific countries defined in the Country_Names table. This address format information is stored in the Country_Addr_Layouts table.



Admin Console: Configure > Membership > Set up tables > Set up country address lay-outs

Desktop: Customers > Set up tables > Country address layouts

Format

This field contains an address format code that will be auto-assigned to an address format (Country_Addr_Layouts.ADDRESS_FORMAT).

Description

Specifies a description for the address format (Country_Addr_Layouts.DESCRIPTION).

Address Fields

Use this drop-down list to select the fields that you want to use in the address format.

Use the area located below the Address Fields field to format the address layout (Country_Addr_Layouts.ADDRESS_LAYOUT). The formatted address layout combines the component fields of the address with four formatting codes:

- [U] - Uppercase. Enter [U] before a component field to make the data in the field all uppercase. For example, [U]CITY would generate all capital letters for a city such as NEW YORK or LONDON.
- [N] - New line. Enter [N] after a component field to insert a carriage return. For example, ADDRESS_1[N] would generate a carriage return and place the next component field on a different line in the address.
- [S] - Space. Enter [S] after a component field to insert a space between component fields. For example, [U]STATE_PROVINCES[S][U]ZIP would display as TEXAS 75208 when generated in an address.
- [C] - Comma. Enter [C] after a component field to insert a comma between component fields. For example, CITY[C][S][U]STATE[S][U]ZIP would display as Dallas, TEXAS 75208 when generated in an address.

Available Countries

Lists the countries that have not had address formats applied to them.

> **Note:** Note: Countries must be entered on the Country names window before they will be available for address formatting.

Add

Used to move selected countries from the Available Countries list to the Format Applied to list. This action is part of the process of applying an address format to a country.

Remove

Used to move selected countries from the Format Applied to list to the Available Countries list. This action is part of the process of removing an address format from a country.

Layout Applied to

Lists the countries for which address formatting has been applied.

Test Layout

Opens the Address Layout Tester window that is used to verify that an address is formatted correctly.

To enter an address format

1. From Country address layouts window, click New. The Format field automatically populates with the next succeeding format code. For example, if the last format code created was 15, then format code 16 will be entered automatically in the Format field.
2. Enter a Description for the country address format.
3. Arrange the component fields in the area located below the Address Fields field to suit the desired address layout. For example, if you want the country name to display on the first line in the address layout, press Enter before ADDRESS_1[N] to move it to the second line, highlight COUNTRY and press Ctrl+X, then press Ctrl+V.
4. Enter the formatting codes in the Address Layouts field to format the address.
5. Click Save.

To apply an address format to a country

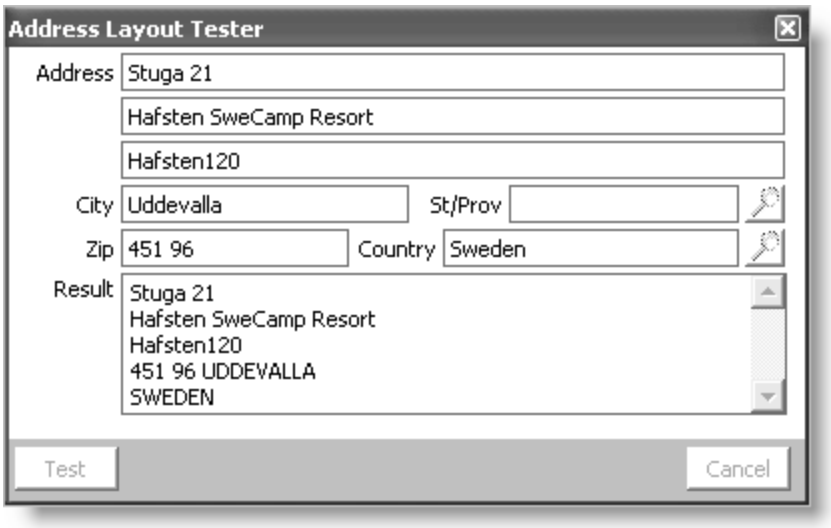
Make sure the country that you want to apply an address format to has been added to the Country_Names table.

1. From Country address layouts window, click Find.
2. Click the lookup icon in the Format field to choose the format code for the address format that you want to modify.
3. Click OK. The address format assigned to that code opens in the window. The countries for which no address formatting has been applied display in the Available Countries drop-down list.
4. Click Edit.

5. Select the country (or countries) from the Available Countries list for which you want to apply address formatting.
6. Click Add to move the selected country from the Available Countries list to the Layout Applied to list.
7. Click Save to apply the address format to the country.
8. (optional) Select Test Layout to verify that the formatted address layout produces the desired result.

Address Layout Tester window

The Address Layout Tester window is used to test and verify that a formatted address layout produces the desired result.



From Customers, select Set up tables > Country address layouts, and select Test Layout

Address

Specifies an address to test a formatted address layout.

City

Specifies a city to test a formatted address layout.

St/Prov

Specifies a state/province to test a formatted address layout.

Zip

Specifies a zip code to test a formatted address layout.

Country

Specifies a country name to test a formatted address layout.

> **Note:** Note: The address format that applies to a given layout is based upon the value entered in the Country field, so be sure to enter a value in this field. If the incorrect value is entered in this field, the test will not function correctly.

Result

Displays the results of the formatted address layout using the values entered in the above fields.

Test

Used to display the test results in the Result field.

To test an address format

1. From Customers, select Set up tables > Country address layouts to open the Country address layouts window.
2. Click Find.
3. Click the lookup icon in the Format field to choose the format code for the address format that you want to test.
4. Click OK to open the address format on the Country address layouts window.
5. Click Test Layout to open the Address Layout Tester window.
6. Enter an address in the first Address field.
7. (optional) Enter an address in the second Address field.
8. Enter a City.
9. Enter a state or province in the St/Prov field.

10. Enter a Zip code.
11. (required) Enter a Country that has had the selected address format applied to it.

    Note: The address format that applies to a given layout is based upon the value entered in the Country field, so be sure to enter a value in this field. If the incorrect value is entered in this field, the test will not function correctly.
12. Click Test to view the results of the formatted address in the Result field.

    To view the address format applied to a country

1. From Customers, select Set up tables > Country names to open the Country names window.
2. Select the country from the Current Countries field. The code for the address layout applied to the country displays in the Address Format field.

   Note: If an address format has not been applied to a country, the Address Format will reflect a zero (0) for the format code.
3. Click Address Layouts to open the Country Address Layouts window and view the address layout.

   To remove address formatting from a country

1. From Customers, select Set up tables > Country names to open the Country names window.
2. Select the country from the Current Countries field. The code for the address format applied to the country displays in the Address Format field.
3. Click Address Layouts to open the Country Address Layouts window.
4. Click Edit.
5. Select the country from the Layout Applied to list for which you want to remove address formatting.

6. Click Remove to move the selected country from the Layout Applied to list to the Available Countries list and remove the address formatting.
7. Click Save.

To edit an address format

1. From Customers, select Set up tables > Country address layouts to open the Country address layouts window.
2. Click Find.
3. Click the lookup icon in the Format field to choose the format code for the address format that you want to edit.
4. Click OK.
5. Click Edit and make the change.
6. Click Save.

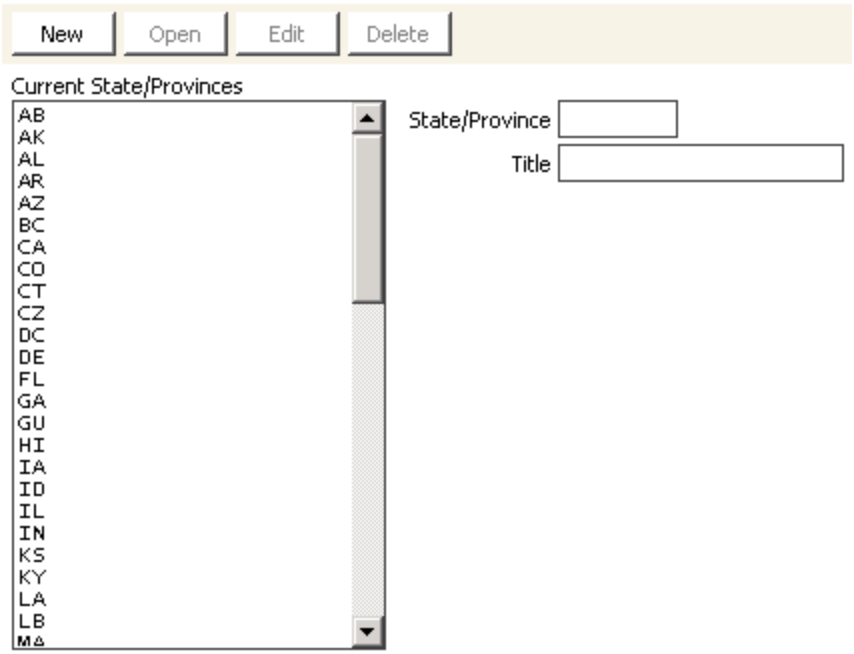
To delete an address format

1. From Customers, select Set up tables > Country address layouts to open the Country address layouts window.
2. Click Find.
3. Click the lookup icon in the Format field to choose the format code for the address format that you want to delete.
4. Click OK.
5. Click Delete.
6. Click Yes.

Set up state/province codes window

The State_Code table is a combination validation/expansion table for the St/Prov field used for customer addresses. This table is preloaded with all 50 two-character state abbreviations and full name descriptions. It also contains valid codes for the District of

Columbia, other related U.S. regions, and Canadian provinces. You can add any entries you need.



Admin Console: Configure > Membership > Set up tables > Set up state/province codes

Desktop: Customers > Set up tables > State/province codes

Current State/Provinces

This field contains a list of defined state/province codes.

State/Province

Enter the state/province code in this field.

Title

Enter the full name of the state/province in this field.

To define state/province codes

1. From Set up state/province codes window, click New.
2. Enter the code for the state/province you want to add to your validation/expansion table in the State/Province field.
3. Enter the full name of the state/province in the Title field.
4. Click Save.

Customer general lookup/validation and expansion tables

There are several general lookup/validation tables in iMIS (see General lookup/validation tables). Many of these tables are optional, but provide a way to maintain consistency in data entry. The following tables are most commonly set up to support Customers:

- ADDRESS_PURPOSE - enables you to have an unlimited number of addresses per customer.
- BAD_ADDRESS - enables you to mark address that do not pass validation with codes such as “moved”, “no_such_addr”, and so on.
- SALUTATION_CODE - provides pre-defined salutations such as “Dear Friends”, Dear <name>, and so on.
- DESIGNATION - provides a pre-defined list of designations such as “MD”, “CPA”, and so on.
- COMMITTEE_GROUPS - provides a pre-defined list of categories into which you can group committees. For example in a large organization there might be several committees that focus on outreach, education, and so on.
- GROUP_CODE - in order to use the Relationships module you must define the GROUP_CODE “Role”.

Setting up Chapter Management

Setting up Chapter Management consists of the following:

- Setting field prompts
- Defining chapter codes

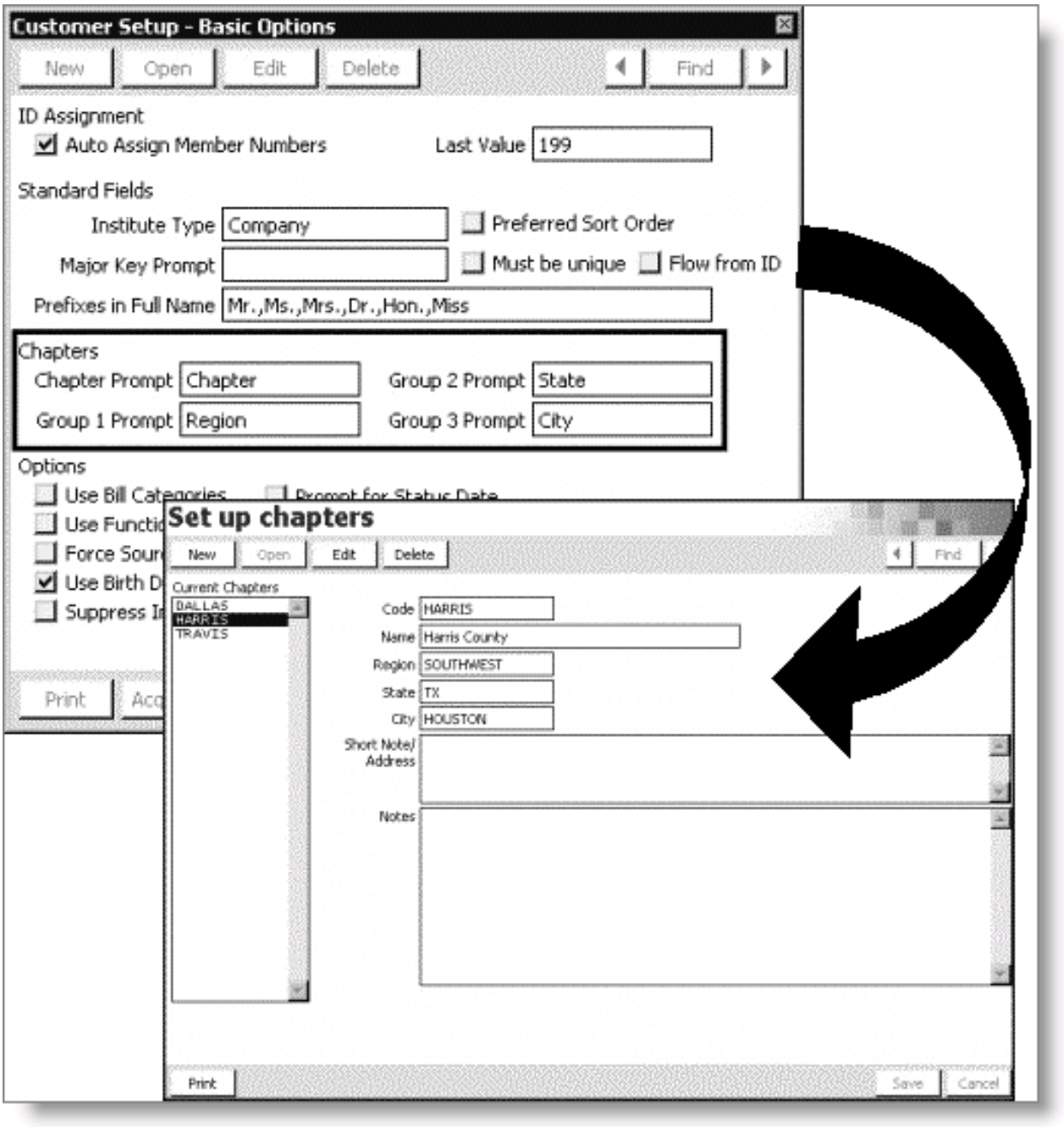
Once setup is complete, you can enter the chapter enrollments for anyone maintained in your customer database.

To use the chapter-tracking feature, your administrator must specify a Chapter Prompt field on the Customer Setup - Basic Options window.

If needed your administrator can also establish a hierarchical structure of up to three levels for your chapters by specifying group prompts on the Customer Setup - Basic Options window. For example, if your chapters are grouped by region, the proper region for the chapter can be designated. This will let you group customers by region (on reports, searches, etc.). With this added capability, you can produce detail or summary reports by region with the information sorted by region overall and chapter under that.

To set chapter prompts

1. From Customers, select Set up module > General, and click Basic Options to open the Customer Setup - Basic Options window.
2. Click Edit.
3. Enter a Chapter Prompt for tracking customers who belong to a particular chapter.
4. (optional) Enter a prompt in the Group 1 Prompt, Group 2 Prompt, and Group 3 Prompt fields. The prompts you define display between the Name and Short Note/Address fields on the Chapters window (from Customers, select Set up tables > Chapters). These groups allow you to specify and maintain hierarchies among your chapters, which facilitates targeted mailings and reporting. Examples of groupings include countries or regions, states, and counties and cities.
5. Click OK.



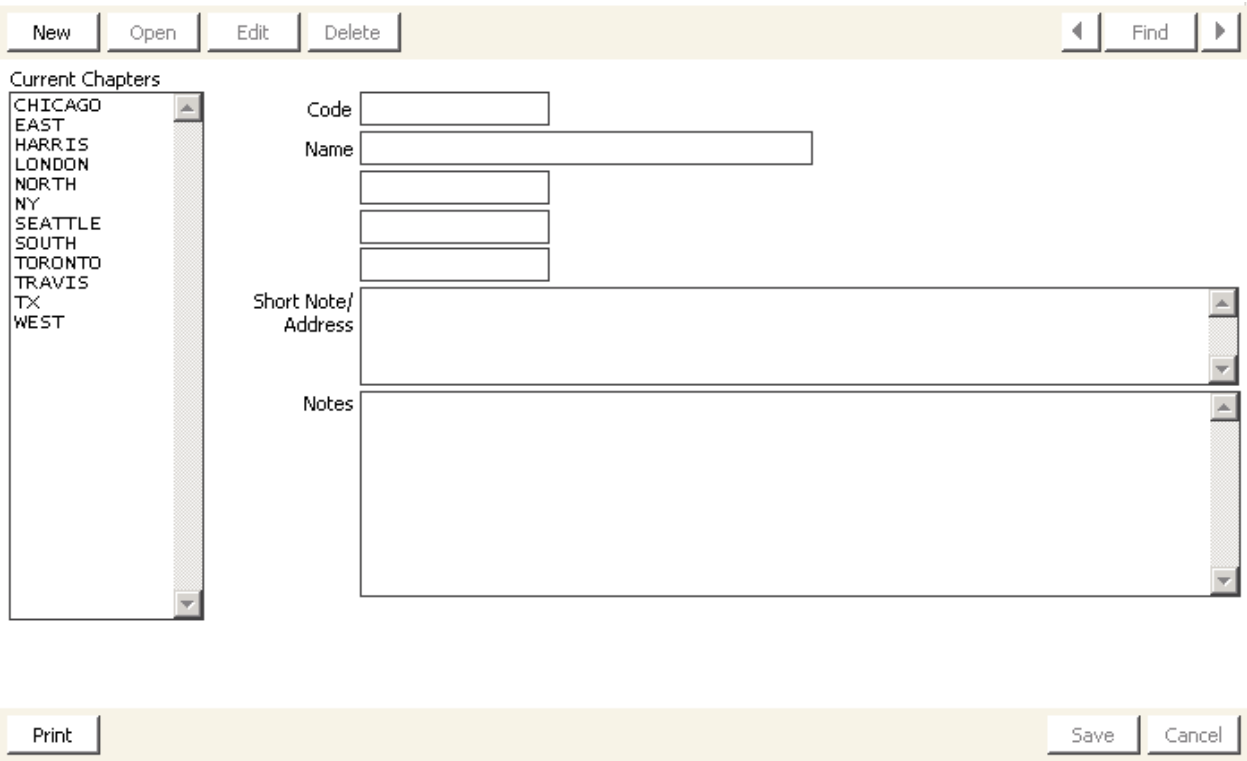
Sample chapter prompts defined on Customer Setup - Basic Options window displaying on Chapters window

Defining chapter codes

With the Chapter Codes table, you can easily track chapter members through iMIS. To maintain chapter designations, you only have to set up a table of chapters and enter a

chapter code for relevant customers in your file. The chapter table entry can be as simple as a chapter code and a chapter name, but you can add additional information such as an address or a note.

Set up chapters window



Admin Console: Configure > Management > Set up tables > Set up chapters

Desktop: Customers > Set up tables > Chapters

Current Chapters

Lists the codes assigned to each chapter.

Code

(required) Use this field to assign a unique code to each chapter. This field holds a maximum of 15 characters.

Name

Use this field to assign a name to each chapter.

Chapter prompts

Specify codes for three groups that correspond to the chapter hierarchy. You define the labels that display for these fields on the Customer Setup - Basic Options window

- Use the first field to enter a code for the highest level grouping of your chapter hierarchy (if applicable). For example, if you have a chapter organizational structure containing several sub-groupings, the Region code could represent the highest level.
- Use the second field to enter a code for the second-highest level grouping of your chapter hierarchy (if applicable).
- Use the third field to enter a code for the third-highest level grouping of your chapter hierarchy (if applicable).

Short Note/Address

Specifies miscellaneous notes about a chapter, as well as an address for the chapter.

Print

Prints information stored in the Chapter Description table.

To define a chapter code

1. From Set up chapters window, click New.
2. Enter an abbreviation for the chapter in the Code field.
3. Enter the full name of the chapter in the Name field.
4. (optional) Enter a code in the three fields between the Name and Short Note/Address fields.
5. (optional) Enter a note or address for the chapter in the Short Note/Address field.
6. (optional) Enter a note for the chapter in the Notes field.
7. Click Save.

To modify a chapter code

1. From Set up chapters window, select the Chapter code you wish to modify.
2. Click Edit.
3. Edit the fields you wish to change.
4. Click Save.

To delete a chapter code

1. From Set up chapters window, select the chapter code you wish to delete.
2. Click Delete.

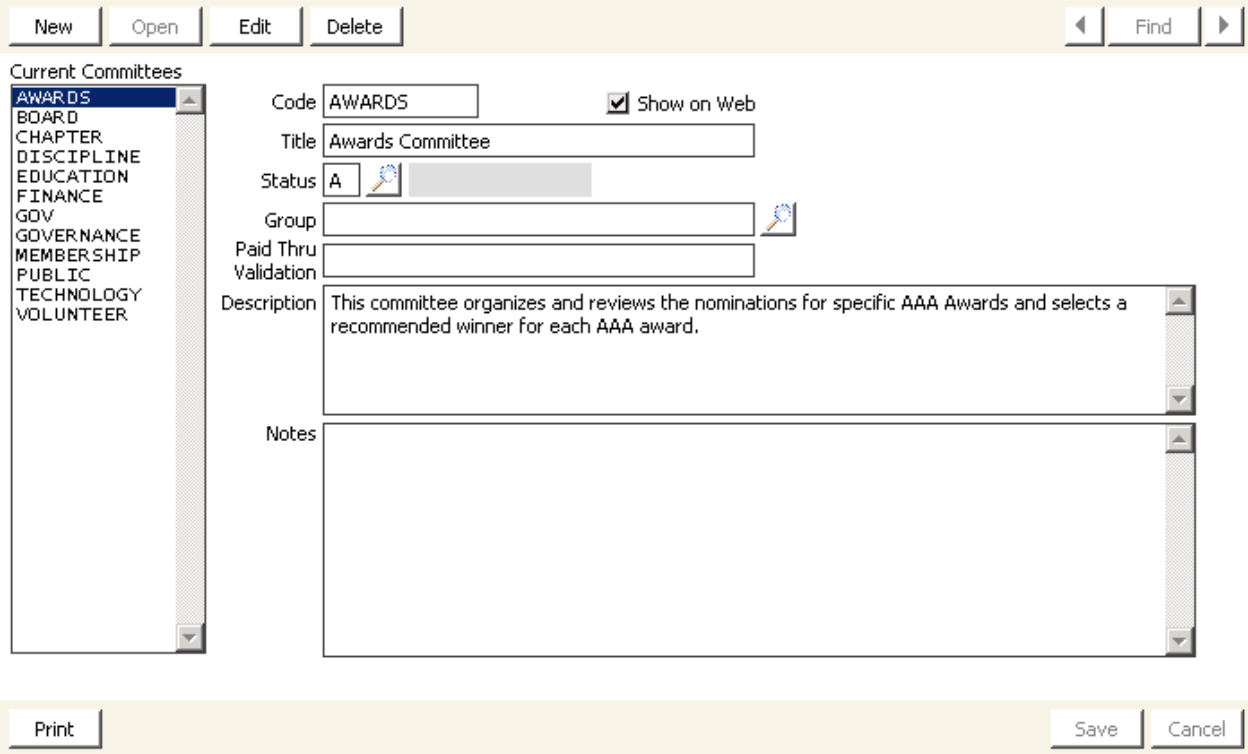
Setting up committees

To set up committees you must:

1. Define committee groups.
2. Define committee codes.
3. Define committee positions.
4. Set committee options and membership duration.

After you set up these tables and options, you can enter the committee assignments (current, future, and historical) for any individuals maintained in your customer file.

Set up committee codes window



Admin Console: Configure > Membership > Set up tables > Set up committee codes

Desktop: Customers > Setup tables > Committee codes

Current Committees

Lists the codes assigned to each committee.

Code

Specifies a unique code for each member. The maximum length is 15 characters.

Show on Web

Enables all committees and committee members associated with this committee code to be listed on the Committees page of the Public view components site. Clear this check-box to prevent the associated committees and committee members from being listed.

Title

Specifies a descriptive name for the committee. The maximum length is 60 characters.

Status

Use this field to identify the status of the committee as A for active or I for inactive. If you wish to discharge a committee, set its status to I for inactive. Click the lookup icon to select an available value.

> **Note:** Note: To use the search feature, the COMMITTEE_STS general look-up/validation table must be set up.

Group

Use to collectively group related committees together. Click the lookup icon and select an available value.

> **Note:** Note: To use the search feature, the COMMITTEE_GROUP general look-up/validation table must be set up.

Paid Thru Validation

Specifies a validation code that links a committee to a dues-product code for a given chapter or area. This field is used to verify that a potential committee member has purchased the required chapter or area dues-product. Click Edit to see a drop-down list of available chapters.

Description

Describes the purpose of the committee. This description is displayed in the committee roster and is available for printing on other reports. The maximum length is 255 characters.

Notes

Stores miscellaneous notes that are printed on reports and directories. The maximum length is 32,000 characters.

Print

Prints information stored in the Committee Codes tables.

To define committee codes

For each committee in your customer system, you must define an alphabetic committee code and a title for the committee that you are setting up in the Committee Codes table. Define committee codes and assign committees to groups after defining the committee groups.

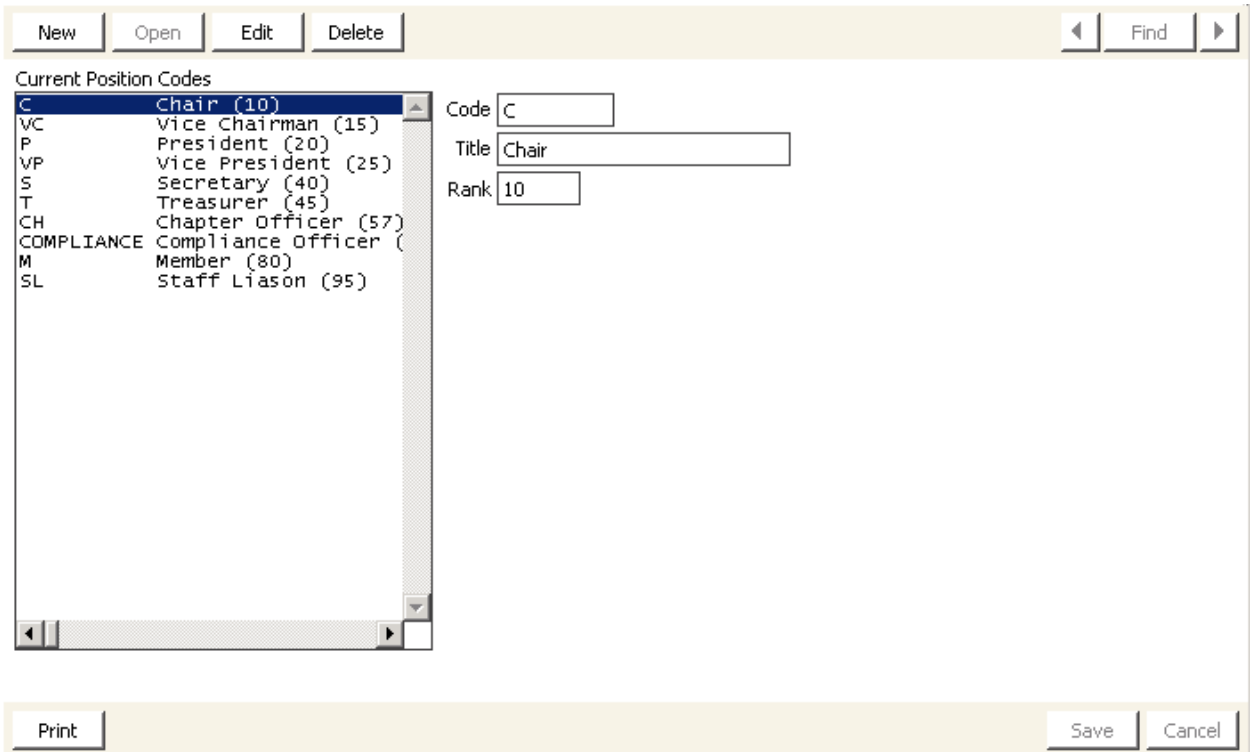
1. From Set up committee codes window, click New to create a new committee code, or select an existing one from the Current Committees list and click Edit to modify it (or click Delete to remove the committee code).
2. Specify the committee code information.
3. Click Save.

To change a committee status

1. From Set up committee codes window, from the Current Committees list, select the committee whose status you want to change.
2. Click Edit.
3. Enter I for Inactive in the Status field.
4. Click Save. A warning message box displays.

   Note: When you change a committee to inactive, iMIS searches the Activity table for any committee members with a Thru date greater than today. If any are found, iMIS will notify you and ask if you want those Thru dates automatically changed to yesterday's date. If you answer yes, iMIS will set those activities' Thru dates back to the previous day's date.
5. Click Yes.
6. Click Save on the Committee codes window.

Set up committee positions window



Admin Console: Configure > Membership > Set up tables > Set up committee positions

Desktop: Customers > Set up tables > Committee positions

Current Position Codes

Displays the various positions that can be held within any committee.

Code

Specifies a code that represents each position that can be held within any committee. Create codes to represent all committee appointees, even those who do not hold officer-level positions. Characters entered in this field are capitalized automatically.

Title

Specifies the descriptive name for the committee position.

Rank

Specifies a unique number that corresponds to the order in which you want committee members who hold this position to display on committee rosters and other related reports. For example, enter 1 for the Chair (to display first on the roster), enter 2 for the next most important position, and so on. Assign the highest number to the lowest position such as a regular committee member.

You can reassign these ranks at any point, but in order to more easily add new positions in the future, you may wish to skip numbers between ranks. For example, if Chair is ranked as a 1, enter a 3 for the second most important position. If you do not enter a rank, iMIS sorts the members in alphabetic order.

Print

Used to print information stored in the Committee Position tables.

To define committee positions

After setting up the Committee Codes table, you must set up the Committee Positions table before you can enter committee appointments. In the Committee positions window, you assign a code, a description, and a rank (order indicator) for each position that may be held within any committee.

1. From Set up committee positions window, click New.
2. Enter a code in the Code field that represents the position you are defining.
3. Enter the descriptive name for the committee position in the Title field.
4. (optional) Enter a unique number that represents the order of importance in the Rank field.
5. Click Save.

To set committee options and membership duration

By default, iMIS sets the membership duration (the date represented in the Thru field in the Manage committees window) to 12. For example, when you type a date in the From field, the Thru date will default to 12 months from that date.

1. From Customers, select Set up module > General, and click Advanced to open the Customer Setup - Advanced window.
2. Click Edit.
3. Set up the options and customer duration for your committees.
4. (optional) Enter labels in the Minutes 1, 2, 3, and 4 Prompts for options that activate in the Minutes window. The option(s) activate in the Minutes window only when a label is entered in a Minutes Prompt field in the Customer Setup - Advanced window.
5. (optional) Enter the number of months in the Default Duration (months) field that you want iMIS to use when calculating the default Thru date in the Manage committees window. To indicate that the committee appointment does not expire, leave this field blank or set it to 0.
6. (optional) Enable the Use Co ID Hierarchy option to link a committee to the ID of a company record. A sub-set of customers associated with the company branch of the committee is created.
7. Click Save.

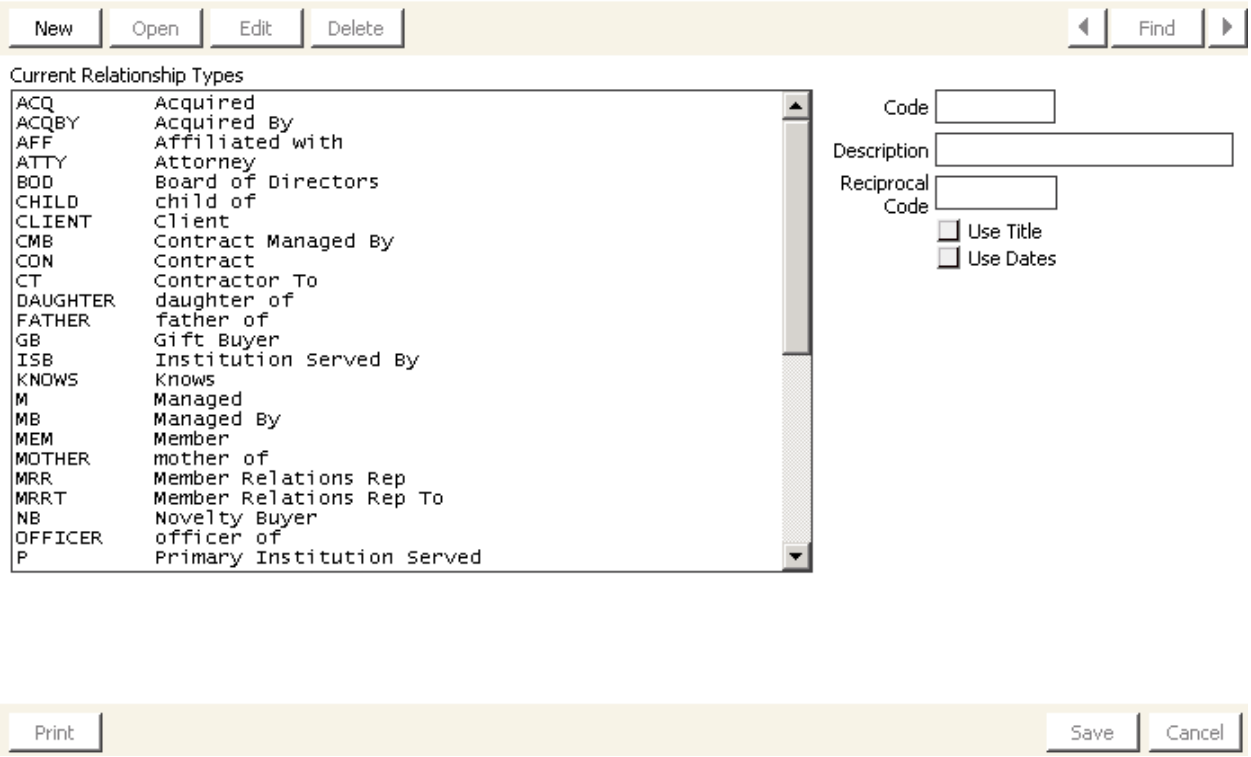
Setting up relationship types

Use the Relationship types window to add, edit, and delete relationship types.

Configuring Relationships

In order to use the Relationships module, you must set up a GROUP_CODE general look-up/validation table.

Set up relationship types window



Admin Console: Configure > Membership > Set up tables > Set up relationship types

Desktop: Manage customers > Set up tables > Relationship types

Code

Specifies a code that you want to represent the relationship.

Description

Use this field to describe the relationship code. Code descriptions display next to their corresponding code on the Relationship Detail window when you select the lookup icons for the Relationship and Reciprocal fields.

Reciprocal Code

(optional) Enter the code (existing or yet to be defined) for the relationship you want to link to this code to in order to create paired relationship records (for example, you can make MOTHER the reciprocal code for the relationship type DAUGHTER).

Use Title

(optional) Enable if you want the Title and Functional Title fields to display in the Relationship Detail window.

Use Dates

(optional) Enable if you want to display fields for the beginning (From) and ending (Thru) dates of the relationship in the Relationship Detail window. Use this option for time-bound activities such as appointments.

To add a new relationship type

1. In the Set up relationship types window, click New.
2. In the Code field, enter a value that you want to use to represent the relationship.
3. In the Description field, enter information that describes the relationship. The description displays on the Relationship Detail window for this code.
4. (optional) If desired, enter the code for the relationship you want linked to your new relationship type in the Reciprocal Code field.

   Note: If you leave the Reciprocal Code field blank for relationship type, two contacts connected with that relationship type will be displayed with that same type.
5. (optional) Enable the Use Title option if you want to display the Title and Functional Title fields in the Relationship Detail window.
6. (optional) Enable the Use Dates option if you want to display fields for beginning (From) and ending (Thru) dates of the relationship in the Relationship Detail window.
7. Click Save.

To edit a relationship type

You can change the Description, Reciprocal Code, and the Use Title or Use Dates options for any of the standard relationship types that are shipped with iMIS, and you can edit any customized relationship types that you created.

1. In the Set up relationship types window, select a code from the list of relationship types.

2. Click Edit.
3. Enter the new information.
4. Click Save to save the changes, or click Cancel to cancel your changes.

To delete a relationship type

1. In the Set up relationship types window, select a code from the list of relationship types.
2. Click Delete. A message displays asking you to confirm the deletion:

- Click Yes to remove the type.
- Click No to cancel the deletion.

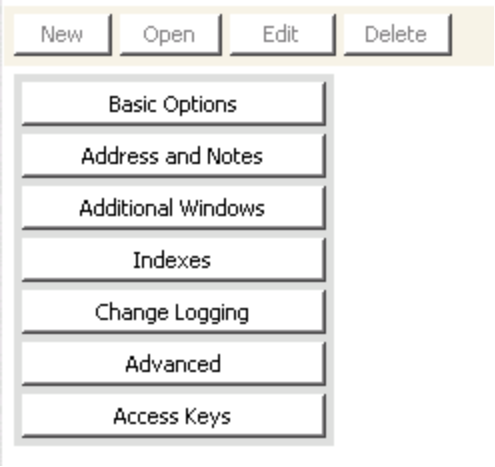
> **Note:** Note: Before deleting a relationship type, check to be sure that your system does not have any relationships set up that use that relationship type.

Customers: Set up module

Customer Management is usable out of the box but is designed to be customized to your specific organization's structure and operation. For this reason, you must work with your System Administrator to set up and configure it to meet the needs of your organization. This area outlines the steps required in setting up iMIS for maintaining your customer data according to organizational requirements for:

- Basic customer options.
- Customer addresses and notes.
- Lookup information for searching with the Find window.
- Fields in the Change Log.
- Advanced customer options.

Configure membership options window



Admin Console: Configure > Membership

Desktop: Customers > Set up module > General

Basic Options

Opens the Customer Setup - Basic Options window.

Address and Notes

Opens the Customer Setup - Address and Notes window.

Additional Windows

Opens the Customer Setup - Additional Windows window.

Indexes

Opens the Customer Setup - Indexes window.

Change Logging

Opens the Customer Setup - Change Logging window.

Advanced

Opens the Customer Setup - Advanced window.

Access Keys

Opens the Customer Setup - Access Keys window.

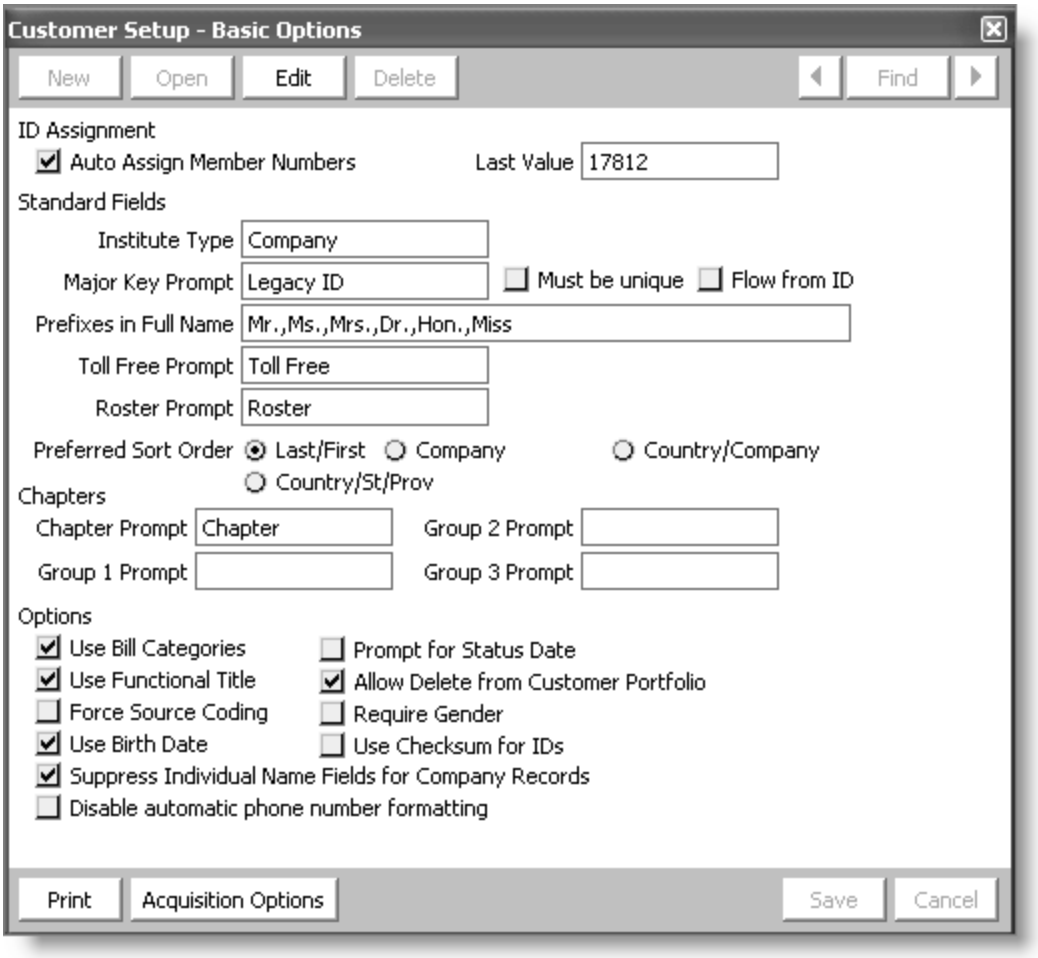
Print

Used to generate and send a system settings report to your report destination.

Setting basic customer options

The Customer Setup - Basic Options window lets you set up user-defined fields that, once defined, will be displayed in the appropriate data maintenance windows. In addition, you can enable and adjust several important system features through this window.

Customer Setup - Basic Options window



From Customers, select Set up module > General, and click Basic Options

Auto Assign Member Numbers

When selected, iMIS assigns a unique customer identification number (ID) to each new customer. This option is required if you allow users to create new accounts in iMIS Public or Web views.

Last Value

Displays the sequential counter iMIS uses in auto-assigning IDs and only has relevance if Auto Assign Member Numbers is enabled. Unless the auto-assign option is disabled, this value will be blank (or zero) for a newly installed system and cause the first ID to be assigned as one (1). If you need to have the first assigned ID be other than one, you can enter a value of one less than what you want the first number to be. You can only enter a value between 0 and 2147483647; otherwise an error will occur.

Institute Type

Assigns a label to the standard company field. The default label is Company. If you assign a different label, that label is used in the Customers Results tab, and in various reports and windows. You may want to assign this label according to the types of customers you serve. For example, if your customers are hospitals, assign Hospital.

Example of Institute Type with the Company label assigned

Preferred Sort Order

Designates the sort order of search results as one of the following:

- Last/First - results are sorted by last name, first name.
- Company - results are sorted by the designated company sort, last name, first name.
- Country/Company - results are sorted by country, state/province, company sort, last

name, first name.

- Country/St/Prov - results are sorted by country, state/province, last name, first name.

> **Note:** Note: The sort options use the labels you configured for Institute Type (by default "Company") and State/Province (by default "St/Prov").

With the exception of certain types of searches for which the default sort order would not be appropriate, results will are sorted according to the sort order chosen. The following types of searches override the default sort order:

- Name - results are sorted by last name, first name, then if prospects are included in searches, whether the person is an existing customer or a prospect.
- Company/Company Only - results are sorted by the designated company sort, then the preferred sort order.

  Note: The Company search (which includes personal records that are associated with company records) adds prospect status as the final sort column.
- Task Date - ignores the preferred sort order; data is not sorted.
- Ad Hoc - if the ad hoc search uses company ID as a criterion, the results are sorted by the designated company sort field. Otherwise, the preferred sort order is followed.

  Major Key Prompt

  (optional) Specifies a primary field through which you can retrieve records. Enable the option by entering a prompt (label) in the field. iMIS then makes the field available for referencing and searching for customer records throughout the system. Useful reference keys are social security numbers, certificate numbers, license numbers, and old customer ID numbers.

> **Note:** Note: The data entered in this field displays in parentheses next to the main ID on most customer reports.

  Must be unique

When selected, the Major Key Prompt field is validated for uniqueness during data entry.

Flow from ID

When selected, links the Major Key field with the Id field, populating the Major Key field with the user's ID.

Prefixes in Full Name

Specifies which prefixes from the PREFIX general lookup table are included in Name.FULL_NAME. The prefixes you enter in this field must match either the Code or the Expansion for the corresponding prefix entered in the PREFIX general lookup table. When entering a list of prefixes, values must be separated by commas. The total length of this field is 5000 characters.

Toll Free Prompt

Specifies a label for toll free numbers. This customized prompt is displayed on several iMIS windows in Orders, Fundraising, Events, Exhibitions, Exposition, and in the Customers area.

Roster Prompt

Specifies the a heading for the Roster tab.

Chapter Prompt

Specifies a prompt (label) for tracking customers who belong to a particular chapter or for similar tracking purposes. You can use the chapter-tracking feature for tracking at levels other than chapter such as district and region.

> **Note:** Note: The Chapter field will be activated only if you enter a label in the Chapter Prompt field. The Chapter field, with your user-defined label, displays on the Status tab.

The group prompt fields within the Chapters area of the Customer Setup - Basic Options window are used to further expand and define chapter affiliation and association. Think of the groups as levels with Group 1 being the first level and largest division of the

association. Chapter would be the fourth level and smallest division of the association. These prompts display in the Chapters window (from Customers, select Set up tables > Chapters).

Group 1 Prompt

Specifies the region the chapter is in. Examples could be country or region such as Western or Central.

Group 2 Prompt

Specifies the division the chapter is in and to further define Group 1. Examples could be states.

Group 3 Prompt

Specifies the area the chapter is in and to further define Group 2. Examples could be counties and cities.

Use Bill Categories

When selected, establishes a sub-grouping of customers. The Category field is shown to the right of the Type field in Customers > Manage customers. Its primary purpose is to sub-categorize customers for billing purposes. For example, if the dues amount for sustaining customers is any of five different sums based on organization size, you can track those size levels in the Category field.

Note: Note: Since it is best to maintain a small group of customer types, use the secondary Category field when you need to break down many different billing levels. See Billing for more.

Use Functional Title

Not implemented

Force Source Coding

When selected, requires a source code entry for income-oriented transactions.

Use Birth Date

Select to display the Birth Date field on the Other tab.

Suppress Individual Name Fields for Company Records

When selected, hides the Name area of Customers > Manage customers, and when a user views a company record, moves the Company area up.

When inserting a new company record, the fields in the Name area are dimmed (unavailable) and cleared of any values as soon as the Customer Type field is set to a company customer type. When a record is saved as a company record, the data is refreshed so that the company fields shift to the top of the area and the Name area is no longer visible.

Note: Note: If a customer type is later changed from a company to an individual, the fields in the Name area of the record are restored; however, any values that existed for those fields are not restored.

Disable automatic phone number formatting

When entering phone numbers in iMIS, the numbers are automatically formatted in the U.S. format of (xxx) xxx-xxxx. When this option is selected, no formatting is applied and the phone number is displayed as typed.

Prompt for Status Date

When selected, iMIS prompts the user to accept or override the customer's status date (not recommended for most users).

Allow Delete from Customer Portfolio

When selected, authorized users can delete customer records directly by clicking Delete on the Customers area (Customers > Manage customers). A warning box prompts the user to verify the deletion.

Note: Note: Disabling this option offers a safeguard against the accidental deletion of records. To delete customer records, mark them for deletion with “D” (or a code-

string beginning with D) in the Status field of Customers > Manage customers (recommended).

Require Gender

When selected, displays the Gender field on the Other tab. This option does not automatically require a gender (M or F) be entered in the field. iMIS automatically populates the Gender field based on the entry in the Prefix field of the Customers area. Prefixes that do not indicate gender (such as Dr.) will not be automatically populated, and the entry will need to be made manually.

Use Checksum for IDs

When selected, adds checksum digits to IDs that are automatically generated for Name records.

Note: Note: This checksum digit will only apply to IDs automatically generated for Name records. It is not used for other automatically assigned IDs.

Print

Generates and sends a system setting report to your report destination.

Acquisition Options

Opens the Customer Setup - Acquisitions Options window where you can specify the member types to use when converting prospect record to Name records.

Note: Note: This button is displayed when iMIS is licensed for Acquisition Management.

About iMIS IDs

iMIS uses the ID internally to store and access customer records. For this reason, you can never change the ID that you assign to a newly entered customer.

Most users should allow iMIS to assign IDs to new customers code for the following reasons:

- The ID must be unique to each customer record. Once it's assigned, you can never change it. If you enter an incorrect ID assignment, you have to delete the entire customer record and reenter it. This can create problems if other records are linked to the incorrect ID.
- The customer ID is not critical for searching, so it does not need to be easily remembered. iMIS provides search methods such as name, company, and customer type for finding customer records.
- You can label and use a second, optional user-entered ID (or major key) for iMIS to maintain. This Major Key field can serve as your primary look-up key throughout iMIS. This user-entered ID can be validated to be unique, such as a social security or license number.
- Having users assign IDs is complicated by the fact that iMIS tracks prospects in the main database, and all of these records must be assigned unique IDs. The volume of these records could make it hard to maintain a user-assigned series of IDs.
- Some features, such as Add to Master in iMIS Events, will auto-assign IDs.

Note: Note: If you allow iMIS to assign the ID, give some consideration to the starting ID. If you are doing an automatic conversion of records from another system and you are retaining the old ID numbers, set the last ID of the original record to any number equal to or higher than the highest pre-established ID number in the data you will be converting. The first system-assigned ID will be one greater than the last ID number of the original record.

Note: Note: If you allow users to create new accounts in iMIS Public or Web views, be sure to enable the Auto Assign Member Numbers option (Customers > Set up module > General > Basic Options).

To facilitate statistical reporting on your organization's customer activity, iMIS automatically tracks a customer's overall status (Name.MEMBER_STATUS) based on status-relevant events: customer type changes, status field changes, and billing payments. These changes are stored with the effective date of the change.

Source codes

Certain income-oriented data entry processes throughout iMIS let you enter a source code for each transaction. This source code, retained in the activity records generated from the transaction, lets you track the campaign or other source that motivated the purchase which can then be used for analysis or searches. Although the Source Code is a data entry field in all appropriate transaction entry windows, users do not have to enter a source code unless you enable this option.

Note: Note: To use this feature, you need to establish a table of valid source codes. See System Management for more.

Customer status

By default, iMIS automatically updates Name.MEMBER_STATUS_DATE to the current system date (or the dues payment's transaction date) for status changes (except when you enter a JOIN_DATE for a new record, in which case the JOIN_DATE is used).

If you select the Prompt for Status Date option, iMIS will prompt you to accept or override the default effective date for the change. The prompt will only occur if you change the status from an active status (status = A or begins with A) to an inactive status (S, I, D or statuses that begin with S, I, or D) and vice versa. A user-defined status that does not begin with those letters may not work with this feature. Most users do not need to manually control these dates, so they should not enable this setup option.

ID Checksum digits

Checksum digits give IDs a more unique value than simple sequentially assigned numbers. The checksum is not a random number; it is derived from the ID using a specific set

of algorithms. The check digit calculation used to derive a checksum is the standard Mod 11 check digit algorithm.

Allowed symbols in iMIS IDs

iMIS does not allow these symbols in the ID field: &, \, [,], |, \, ", ', #, +, <. Remember that the Auto Assign Member Numbers option must be cleared in order for you to enter IDs in the ID field.

Preferred sort order options

You can select from several options when configuring how search results are sorted in the Customers Results tab. The Customer Setup - Basic Options window offers you the following choices of Preferred Sort Order:

- Last/First - results are sorted by last name, first name.
- Company - results are sorted by the designated company sort, last name, first name.
- Country/Company - results are sorted by country, state/province, company sort, last name, first name.
- Country/St/Prov - results are sorted by country, state/province, last name, first name.

> **Note:** Note: The sort options use the labels you configured for Institute Type (by default "Company") and State/Province (by default "St/Prov").

The Preferred Sort Order options let you choose the order in which Find results are displayed

With the exception of certain types of searches for which the default sort order would not be appropriate, results are be sorted according to the sort order chosen. The following types of searches override the default sort order:

- Name - results are sorted by last name, first name, then if prospects are included in searches, whether the person is an existing customer or a prospect.
- Company/Company Only - results are sorted by the designated company sort, then the preferred sort order.

  Note: The Company search (which includes personal records that are associated with company records) adds prospect status as the final sort column.
- Task Date - Ignores the preferred sort order; data is not sorted.

  Ad Hoc - If the ad hoc search uses company ID as a criterion, the results are sorted by the designated company sort field. Otherwise, the preferred sort order is followed.

  To set basic customer options

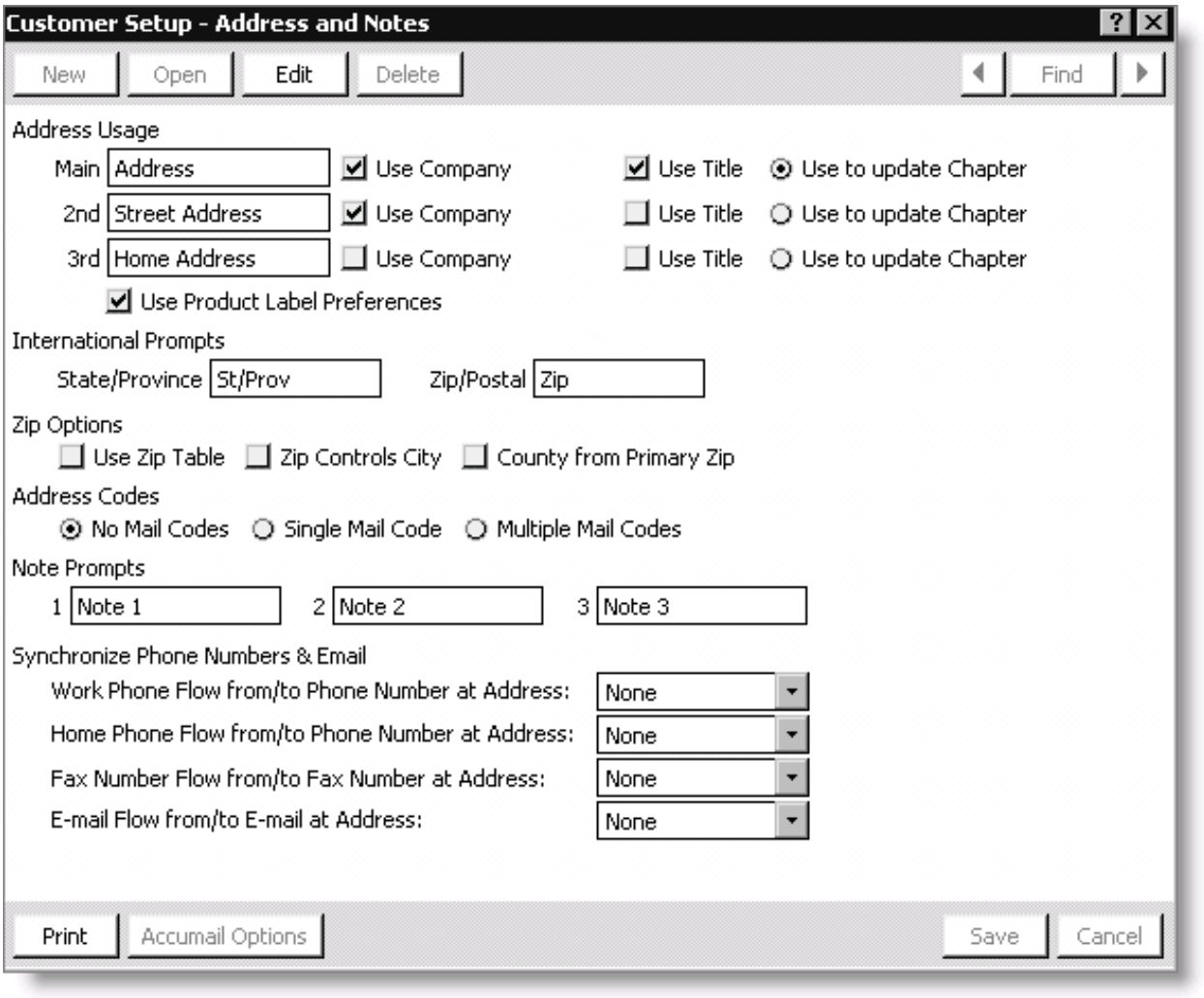
1. From Customers, select Set up module > General, and click Basic Options to open the Customer Setup - Basic Options window.
2. Click Edit.
3. Configure the iMIS options you prefer.
4. Click Save.

Setting customer address and notes

The Customer Setup - Address and Notes window gives you control over the address fields on the Address tab and Notes tab on the Manage customers window and enables you to identify or label the types of addresses you want to maintain for your customers. Within iMIS, up to three address blocks can be maintained for each entity or individual. By labeling the three addresses, you can designate which types of addresses to use in which address blocks. For your address labels or prompts, use a descriptor such as Street, Home, or Business.

> **Note:** Note: Additional address tabs can be added to the Manage customers window be defining an ADDRESS_PURPOSE general lookup/validation table (see "ADDRESS_PURPOSE (Validation)").

Customer Setup - Address and Notes window



From Customers, select Set up module > General, and click Address and Notes

Address Usage

Main - Specifies the label (purpose) for the primary (main) address block of the customer. The main address displays on both Customers > Manage customers and the Address tab.

2nd and 3rd - Use these fields to enter the labels (purposes) for the secondary addresses (if any) of the customer. These addresses display only on the Address tab.

Use Company and Use Title - Enable these fields to designate whether or not to print an individual's title and company name. For example, enable both options to include the title and company for a business address. For a home address, disable one or both options, as appropriate. If you use small (1-inch) labels, you may need to disable these options so that the address fits within the 5-line limit.

> **Note:** Note: You can toggle the Use Company and/or Use Title fields between special purpose label runs. For example, if you normally include titles on your larger labels but today need to run a set of 1-inch labels, temporarily disable the Use Title field.

Use to Update Chapter - Enable these fields to automatically update the chapter when inserting and editing an address.

> **Note:** Note: You will need to populate the Zip_Code.CHAPTER field using SQL for each zip code, or a range of zip codes, in the table before this option will automatically update the chapter. You must also enable the Use Zip Table and County from Primary Zip options located under Zip Options.

Use Product Label Preferences - Select to allow selecting specific label preferences for any mailing label on a per-customer basis. For example, you may wish to mail a social invitation to a customer's home address instead of the default office address.

> **Note:** Note: You can also use this feature to assign specific label addresses for billing products on a per-customer basis.

International Prompts

Specify labels for address information that varies depending on your locale.

State/Province - Specifies the appropriate label (prompt) for the state or province fields. For example, if most of your customers live in the United States, label the field State. If most live in Canada, label the field Province.

Zip/Postal - Specifies the appropriate label (prompt) for the zip code or postal code fields. For example, if most of your customers live in the United States, label the field ZIP. If most live in Canada, label the field Postal Code.

> **Note:** Note: The Customer Management system comes with a table of U.S. ZIP codes with their corresponding cities, states, and counties. Using this table, iMIS offers a variety of ZIP Code look-up features that you can activate.

Zip Options

Use Zip Table - When selected, speeds up the initial data entry process by automatically filling in the city and state values when a ZIP code is entered. With this option enabled, iMIS auto-fills the city and state when those fields are left blank.

Zip Controls City - When selected, causes ZIP code look-up to over-ride and correct any city and state values that don't match the city/state table values for the ZIP code. This correction only occurs when you enter or edit a ZIP code.

> **Note:** Note: If you enable the Use Zip Table and Zip Controls City options, you can still override the city name after you enter the zip code, if necessary. To do this, enter the zip code for the address; the city and state fields display default values. Replace the city name with the value you want and save the record (tabbing through the zip code field will not change the city back to the default). To revert to the default city, delete the city, state, and zip values. Then save and edit the record, and re-enter the zip.

County from Primary Zip - Select to fill in the county field from the ZIP code. The county is derived from the ZIP code entered in Customers > Manage customers.

> **Note:** Note: If you are licensed for AccuMail and have enabled the AccuMail option Update County/Congressional District, that AccuMail option will override the County from Primary Zip option.

Address Codes

No Mail Codes - Select this field if you do not need the Mail Code field. This deactivates the Mail Code field in Customers > Manage customers.

Single Mail Code - Select this field if you want to use the Mail Code field but only need a single mail code to apply to any of the available three addresses. This activates the single Mail Code field in Customers > Manage customers although it will be used with all of the customer's addresses.

Multiple Mail Codes - Select this field if you want to use the Mail Code field and need a distinct mail code for each alternative address. Choose this option if you have special groupings to apply to customers only when a certain address is specified, such as a business versus a home address.

> **Note:** Note: To use the Single Mail Code and Multiple Mail Codes options, the MAIL_CODE lookup/validation table must be set up. See System Management for more.

Note Prompts

Note 1, 2, and 3 - Use these fields to label the note field headings on the Notes tab and on the reports that include notes. As with other optional fields, these fields display on the Notes tab only if you labeled (activated) them.

Label the note fields to standardize their purpose or usage for all customers. For example, you could reserve one for internal-use notes or reminders, one for text to display in the customer directory, and the last to record directions to a customer's office.

Synchronize Phone Numbers & Email

Work Phone Flow from/to Phone Number at Address - Select the address purpose whose phone number field you want to map to the Work Phone field on the Profile tab.

Home Phone Flow from/to Phone Number at Address - Select the address purpose whose phone number field you want to map to the Home Phone field on the Profile tab.

> **Note:** Note: Home Phone Flow from /to Phone Number at Address and Work Phone Flow from/to Phone Number at Address cannot be mapped to the same address purpose.

Fax Number Flow from/to Fax Number at Address - Select the address purpose whose fax number field you want to map to the Fax field on the Profile tab.

E-mail Flow from/to E-mail at Address - Select the address purpose whose e-mail address field you want to map to the E-mail field on the Profile tab.

Print

Used to generate and send a system setting report to your report destination.

Accumail Options (QAS Options)

Opens an options window for your address verification software (either AccuMail or Quick-Address).

To set customer address and notes options

> **Note:** Note: We recommend specifying a prompt for each of the three default notes. If you do not specify a prompt for these notes, they display as disabled blank notes on the Notes tab.

1. From Customers, select Set up module > General, and click Address and Notes to open the Customer Setup - Address and Notes window.
2. Click Edit.
3. Configure Address and Notes options.
4. Click Save.

To identify your e-mail program

iMIS is programmed to look in the Windows™ System directory for the MAPI32.DLL file and access the e-mail program that is configured to the MAPI32.DLL. MAPI is the

Messaging Applications Programming Interface that enables you to send and receive e-mail.

To use the e-mail feature in iMIS, your e-mail program must be MAPI compliant. The versions (or later versions) of the following messaging programs are MAPI compliant.

- Outlook 97/98 or higher
- GroupWise 5.2 or higher
- Eudora Pro 2.2 or higher
- Eudora 3.0 and higher

> **Note:** Note: There is a conflict when both Eudora and Microsoft™ Exchange are installed. In order to use Eudora, you have to uninstall Microsoft Exchange.

You can tell what e-mail program your MAPI 32.DLL is configured to by looking at the properties of the MAPI32.DLL.

1. Right click on the Start button on your Windows Taskbar and select Explore.
2. Navigate to the \Windows\System or \Winnt\System32 directory.
3. Locate the MAPI32.DLL file.
4. Right click on the MAPI32.DLL file and select Properties.
5. Select the Version tab.
6. Highlight the Company Name. The Company Name will be the vendor of your e-mail package, for example, Microsoft, Eudora, and so forth.

> **Note:** Note: You may have to contact your software vendor to make sure they issue a MAPI32.DLL with their e-mail software package.

To create the EMAIL activity type

Sending e-mail to a customer will generate an activity record for that customer if the EMAIL activity type has been created.

1. From Customers, select Set up module > Activity types to open the Activity types window.
2. Click New.
3. Enter EMAIL in the Type field.
4. Enter a Description for the activity.
5. Enter a prompt for Description.
6. Enter a prompt for Note.
7. Enter a prompt for Source.
8. Enter additional prompts, if needed.

   The prompts entered in the Activity types window dictate which fields are enabled and visible in the Activity Detail window.
9. Click Save to update the activity type.

Troubleshooting: Email

Problem: Selecting the E-mail icon in iMIS prompts you to choose a profile.

Solution: A profile is a group of settings that define how your e-mail is set up for a particular user. If you get this message, choose a profile by typing in your profile name or selecting your name from a drop-down list. If you do not have profiles set properly, go back to your e-mail program and configure the profiles properly.

Problem: Multiple e-mail programs conflict with each other.

Solution: It is best not to have multiple e-mail programs loaded at one time. Uninstall the program(s) you are not using.

Problem: MAPI32.DLL was overwritten when a new software package was installed.

Solution: This is a common problem and often happens when installing any type of software, not just e-mail programs. After installing the software product, reinstall your e-mail

program in order to reinstall the e-mail version of the MAPI32.DLL. This problem often occurs when using the GroupWise e-mail program. After installing any software product, reinstall the GroupWise e-mail program.

Synchronizing phone and email data

You can map the Work Phone, Home Phone, Fax, and E-mail fields (Name table) on the Profile tab on the Manage customers window to the Phone, Fax, and E-mail fields (Name_Address table) on any address purpose defined in the Main, 2nd, or 3rd fields on the Customer Setup - Address and Notes window.

By mapping these fields, the data defined in these fields automatically populates the corresponding fields on the Profile tab or the address purpose tab (Name_Address data to Name data and vice versa). The data in the mapped address purpose field takes precedence over the data in the field on the Profile tab. Synchronization enables data to match and eliminates the need to enter data twice.

The following fields on the Customer Setup - Address and Notes window can be synchronized:

- Work Phone Flow from/to Phone Number at Address
- Home Phone Flow from/to Phone Number at Address
- Fax Number Flow from/to Fax Number at Address
- E-mail Flow from/to E-mail at Address

> **Note:** Note: User-defined company flow down does not support the Work Phone, Home Phone, Fax, and E-mail fields. No error message displays if you specify these fields in the User Defined Company Flow Down field on the Customer Setup - Advanced window, but specifying these fields in the User Defined Company Flow Down field has no effect on user-defined company flow down. The Work Phone and Fax fields are part of automatic company flow down, which can be used separately or in addition to user-defined company flow down.

The fields in the Profile tab of the Detail area and the fields in the Address area are listed in the following table. Also listed are the iMIS table names where the data is stored. A “Yes” is marked next to the fields that are automatically included in child records that are linked to company records.

Detail area Profile tab		
Work Phone	Name.WORK_PHONE	Yes
Home Phone	Name.HOME_PHONE	
Fax	Name.FAX	Yes
Toll Free	Name.TOLL_FREE	Yes
Email	Name.EMAIL	
Web Address	Name.WEBSITE	
Address area Main Address		
1st line Address	Name_Address.ADDRESS_1	Yes
2nd line Address	Name_Address.ADDRESS_2	Yes
City	Name_Address.CITY	Yes
State	Name_Address.STATE_PROVINCE	Yes
Zip	Name_Address.ZIP	Yes
Preferred Mail	Name_Address.PREFERRED_MAIL	
Preferred Bill	Name_Address.PREFERRED_BILL	
Phone	Name_Address.PHONE	
Fax	Name_Address.FAX	
Email	Name_Address.EMAIL	
2nd Address		
Address	Name_Address.ADDRESS_1	
2nd line Address	Name_Address.ADDRESS_2	
City	Name_Address.CITY	
State	Name_Address.STATE_PROVINCE	

Zip	Name_Address.ZIP
Preferred Mail	Name_Address.PREFERRED_MAIL
Preferred Bill	Name_Address.PREFERRED_MAIL
Phone	Name_Address.PHONE
Fax	Name_Address.FAX
E-mail	Name_Address.EMAIL
3rd Address	
Address	Name_Address.ADDRESS_1
2nd line Address	Name_Address.ADDRESS_2
City	Name_Address.CITY
State	Name_Address.STATE_PROVINCE
Zip	Name_Address.ZIP
Preferred Mail	Name_Address.PREFERRED_MAIL
Preferred Bill	Name_Address.PREFERRED_MAIL
Phone	Name_Address.PHONE
Fax	Name_Address.FAX
E-mail	Name_Address.EMAIL

Note: Note: You can include additional fields to flow down from company (parent) records to linked (child) records. From Customers, select Set up module > General, and click Advanced to open the Customer Setup -Advanced window. Enter the Table.FIELD in the User Defined Company Flow Down field. For example, to include the Web Address shown on the Profile tab as a company flow down field, enter Name.WEBSITE.

Customers synchronization behavior

Synchronization behavior is dependent on the address purpose selected in the Customer Setup - Address and Notes window (Synchronize Phone Numbers & Email area).

> **Note:** Note: If you populate a field on a mapped address tab that does not contain an address, make sure to enter an address to avoid blank address labels.

- If None is selected, the field on the Profile tab can be edited and the value in the field is not automatically synchronized with any field on any address purpose tab.
- If a value other than None is selected and:
- The mapped field on the address tab is not blank - The field on the Profile tab is automatically populated with the value from the mapped field on the address tab and is read-only.

  Note: If the field on the Profile tab previously contained a value, this value is overwritten by the value in the mapped field on the address tab.
- The mapped field on the Main address tab is blank, but the field on the Profile tab is not blank - The mapped field on the main address tab is automatically populated with the value from the field on the Profile tab.
- The mapped field on a secondary address tab is blank, but the field on the Profile tab is not blank - The mapped field on the secondary address tab is automatically populated with the value from the field on the Profile tab only if the secondary address record already exists.
- If the mapped field is on a secondary address tab and that secondary address record does not already exist, the mapped field on the secondary address tab is not automatically populated with the value from the Profile tab and the field on the Profile tab can be edited. If you click in the mapped field on the secondary address tab, this field is automatically populated with the value from the Profile tab and the field on the Profile tab becomes read-only. Any subsequent changes must be made in the mapped field on the address tab.
- Both the mapped field on the address tab and the field on the Profile tab are blank - Neither field contains a value and both fields can be edited.

- If you enter a value in the mapped field on the address tab, the field on the Profile tab is automatically populated with this value and the field on the Profile tab is read-only.
- If you enter a value in the field on the Profile tab, the mapped field on the address tab is automatically populated with the value from the Profile tab (unless the mapped field is on a secondary address tab and the secondary address record does not already exist) and the field on the Profile tab is read-only.

Imported records and synchronization

> **Note:** Caution! (Applies to records imported with iMIS Importer, NRDS, or any other import method) Due to the complexities of phone/e-mail synchronization, synchronization will only work one way from Name to Name_Address, and not from Name_Address to Name.

If you are importing data and using synchronization, the imported phone, fax, and e-mail data must be imported directly to the Name table. If updates are made directly to the Name_Address table through an import and you are synchronizing data, the Name_Address phone, fax, or e-mail value will immediately be overwritten by the current Name value, even if the Name value is blank.

Running the synchronization SQL script

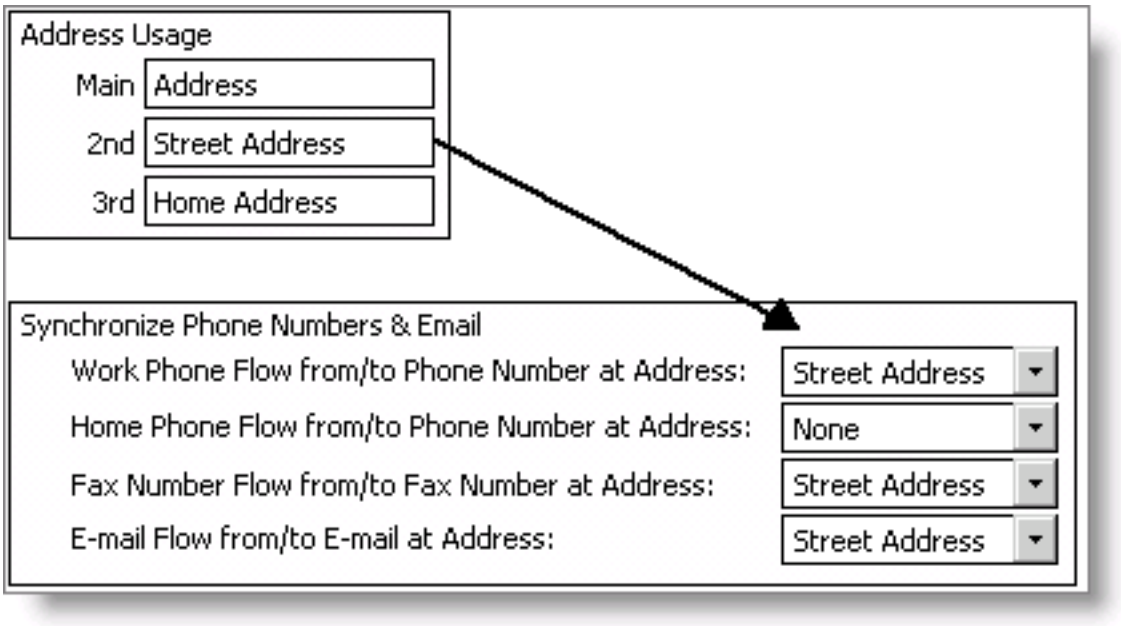
If you choose to synchronize phone numbers and e-mail addresses, you must run the Run Name_Address to Name Global Sync resynchronization SQL script located on the System Reports and Queries window (select Utilities > Reports and Queries, select Table Maintenance from the Report Types list, and select the Run Name_Address to Name Global Sync report). This script updates all existing records in the iMIS database based on the values you entered in the synchronized fields.

You must be logged into iMIS as the database administrator (dba or sa) to run this script. If the Name_Address field is not blank and is different than the Name field, a change log entry is created for each Name record changed. If multiple changes are made for a given Name record, there is a separate log entry for each field.

You must run the resynchronization SQL script every time a change is made to any of the Synchronize Phone Numbers & Email fields, except when changing a value to None. You must restart iMIS after running the synchronization SQL script.

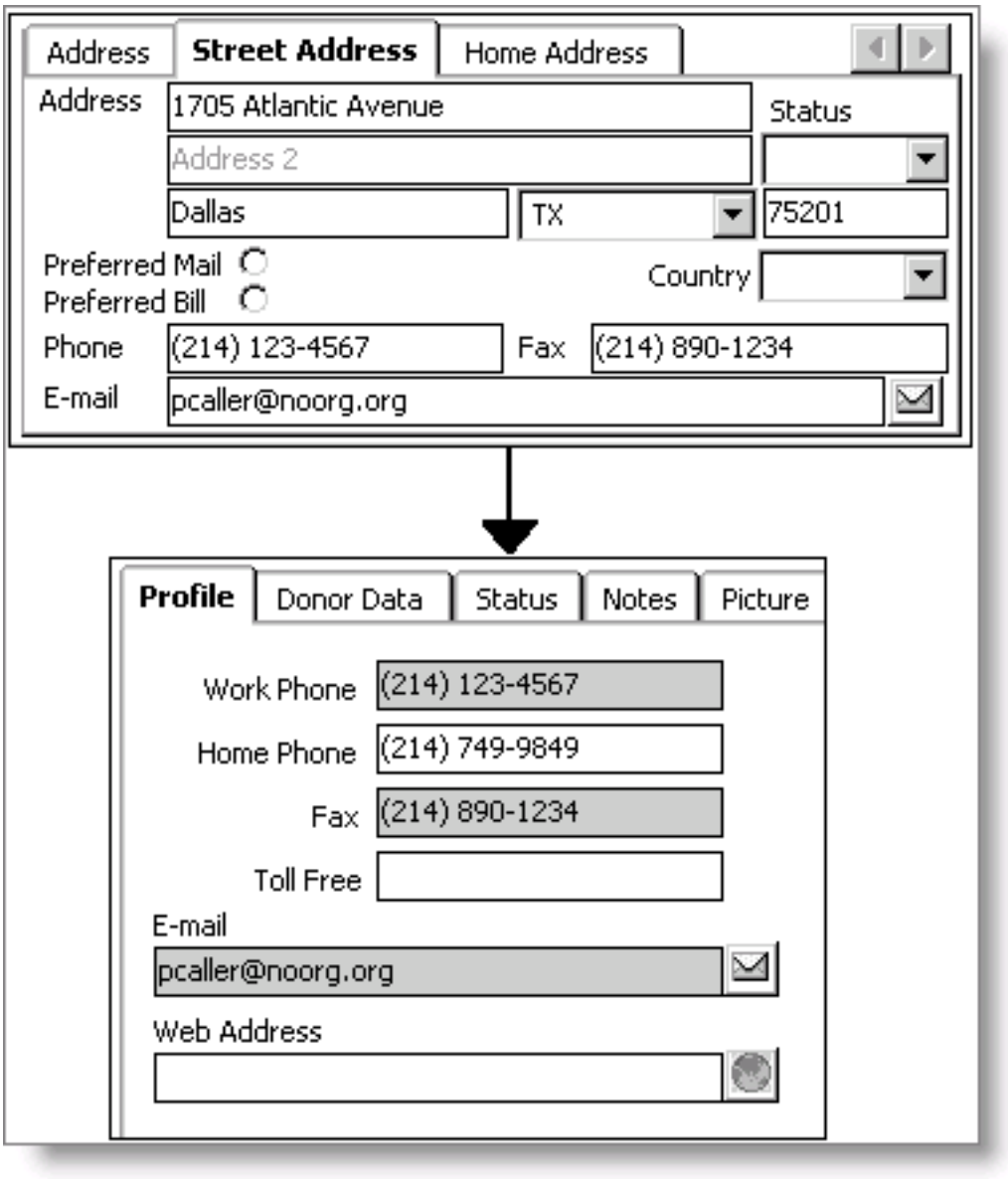
Synchronizing work phone, fax, and email example

In this example, the second address purpose, specified in the 2nd field on the Customer Setup - Address and Notes window, is Street Address. Street Address is selected from the Work Phone Flow from/to Phone Number at Address, Fax Number Flow from/to Fax Number at Address, and E-mail Flow from/to E-mail at Address drop-down lists.



Address flow down

The Work Phone, Fax, and E-mail fields on the Profile tab are automatically populated with the information from the Phone, Fax, and E-mail fields on the Street Address tab. The Work Phone, Fax, and E-mail fields are read-only since the Phone, Fax, and E-mail fields on the Street Address tab are not blank.



Phone number and email flow down

Automatic updating and synchronization

When a user or system action updates a customer's phone number, fax number, or e-mail address on the address tab that corresponds to the Profile tab specified in one of the Synchronize Phone Numbers & Email fields, iMIS automatically performs the following actions:

- Updates the Work Phone, Home Phone, Fax, and E-mail fields on the Profile tab as needed
- Performs any synchronization/flow-down tasks needed to keep the Work Phone, Home Phone, Fax, and E-mail fields accurately synchronized with the customer address record.

Avoiding blank address records

It is possible to create address records that contain a phone number but no address. For example, if you enter a value in a field on the Profile tab and the secondary address record that corresponds to the mapped field does not exist, the mapped field on the secondary address tab is not automatically populated with the value from the Profile tab. If you click in the mapped field on the secondary address tab, the field is populated with the value from the Profile tab, but the other fields, including the address fields, of the secondary address tab will still be empty. This can result in the printing of blank labels during a label run.

If you need to track secondary phone number values such as pager and cell phone numbers, you should create user-defined tables and custom tabs in Customers for this purpose rather than storing these numbers in address purpose fields. This prevents the creation of address records that contain a phone number but no address.

> **Note:** Note: If you populate a field on a secondary address tab that does not contain an address, make sure to enter an address to avoid blank address labels.

To synchronize phone numbers and e-mail

1. From Customers, select Set up module > General.
2. Click Address and Notes to display the Customer Setup - Address and Notes window.
3. Click Edit.
4. Select the work phone address mapping from the Work Phone Flow from/to Phone Number at Address drop-down list. The default address mapping is None.

5. Select the home phone address mapping from the Home Phone Flow from/to Phone Number at Address drop-down list. The default address mapping is None.

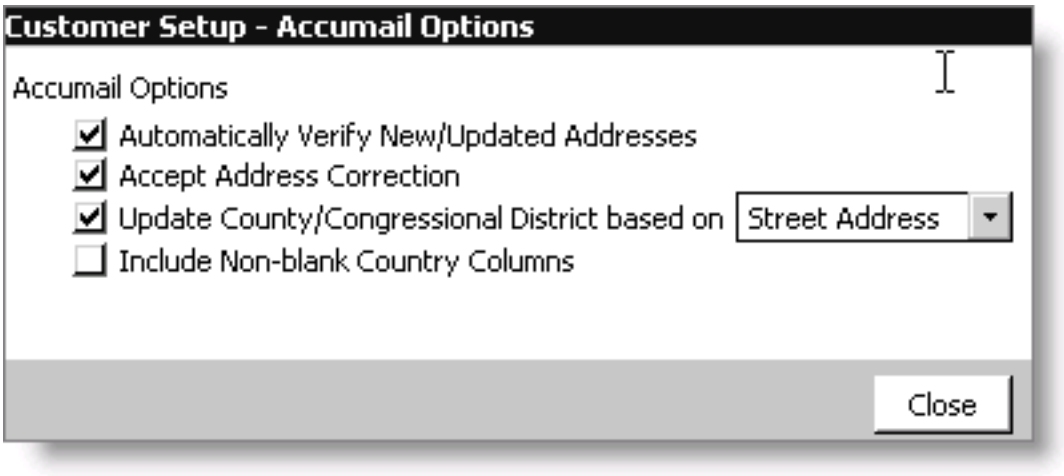
   Note: Home Phone Flow from/to Phone Number at Address and Work Phone Flow from/to Phone Number at Address cannot be mapped to the same address purpose.

6. Select the fax number address mapping from the Fax Number Flow from/to Fax Number at Address drop-down list. The default address mapping is None.
7. Select the e-mail address mapping from the E-mail Flow from/to E-mail at Address drop-down list. The default address mapping is None.
8. Click Save.
9. Ensure that no other users are logged in to iMIS.
10. Select Utilities > Reports and Queries.
11. Select Table Maintenance from the Report Types scrolling list.
12. Select Run Name_Address to Name Global Sync from the Available Reports scrolling list.
13. Click Run. The Run Name_Address to Name Global Sync window and a confirmation message display. Click Yes.
14. Exit and restart iMIS.

> **Note:** Note: You must exit and restart iMIS immediately after running the Run Name_Address to Name Global Sync script for synchronization to occur.

Setting Accumail options

The Accumail options are set on the Customer Setup - Accumail Options window.



From Customers, select Set up module > General, click Address and Notes, and click Accumail Options

- Automatically Verify New/Updated Addresses - Enable to ensure that the database will always contain certified address information.
- Accept Address Correction - Enable to standardize your addresses to meet the US Post Office preferences. For example, Avenue will be changed to Ave, and streets that have alias names will be changed to the accepted Postal street name.
- Update County/Congressional District based on - Enable to update the county/-congressional districts based on the address purpose chosen from the dropdown. Any of the three available addresses can be used.
- Include Non-blank Country Columns - Enable to cause iMIS to verify addresses with populated country fields.

To set customer Accumail options

1. From Customers, select Set up modules > General, and click Address and Notes to open the Customer Setup - Address and Notes window.
2. Click Edit.
3. Click Accumail Options to display the Customer Setup - Accumail Options window.
4. Enable or disable the Accumail options as desired.

5. Click Close.
6. Click Save.

Defining lookup indexes for the Find window

iMIS maintains a number of standard indexes that enable you to retrieve customer information quickly.

The customer ID is an indexed field, and all records are stored by their ID. You can locate records by ID at any time. In addition, iMIS keeps alternative indexes such as alphabetical key (combined last name, first name), company sort name (which displays to the right of the Company field in the Customer Portfolio), and the optional Major Key (social security number, license number, etc.).

Having iMIS maintain these keys is like having a filing system that uses multiple filing methods simultaneously: numerical, alphabetic, and alphabetic by company name. You can retrieve a record by entering the ID or all or part of the name key or company name.

In addition to these four standard indexed fields, you can establish up to four more indexes. These user-specified indexes can be based on any field in the customer file including user-defined demographics. For more power, you can designate a list string field as an index, causing index entries to be maintained for each of the codes in a list. You can also specify a formula based on a combination or manipulation of one or more fields. For example, you can specify a customer type/category combination, a set of initials (first letter of first, middle, and last fields), or the month/year of the join date.

If you define any additional indexes, they display as choices when you request a customer look-up (Find, lookup icon, or Ctrl+L) throughout iMIS.

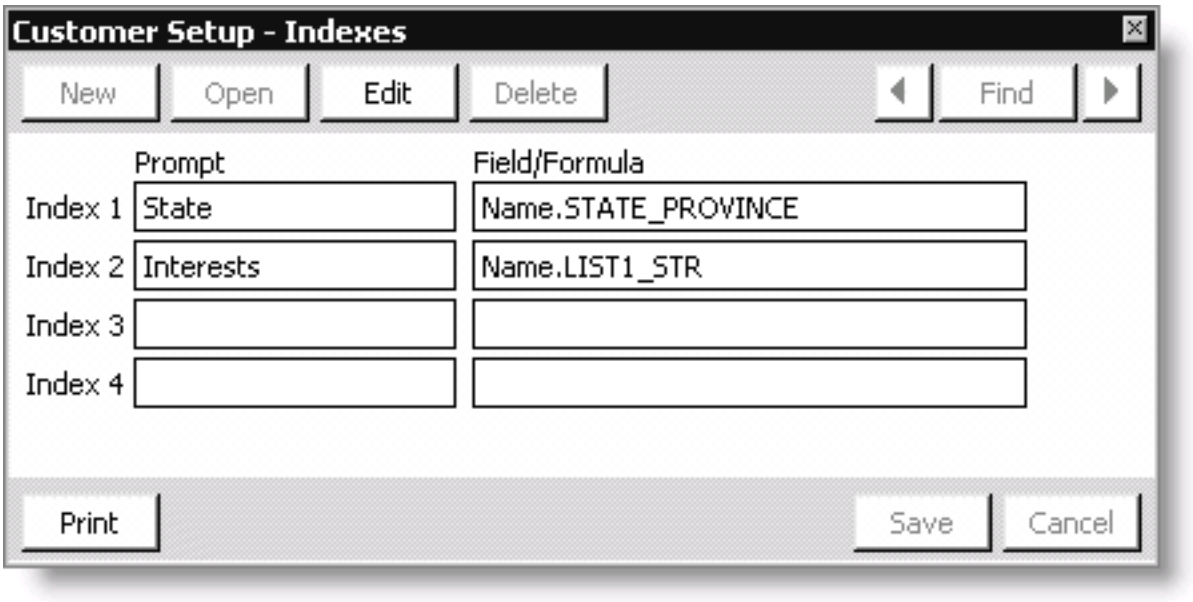
For best results, only create indexes for the key fields for which you plan to conduct daily searches. Every additional index increases the overhead burden on the system and affects performance. For less-critical searches by field, plan to use the ad hoc searching feature of the Find window.

Note: Note: When you create additional indexes on the Customer Setup - Indexes window, you must run the Rebuild Name_Indexes script to update the Name_ Indexes table and then change the parameters for report specifications to match the order of your indexes. For more information, see the iMIS Utilities Menu.

Note: Note: Results for user-defined indexes are returned in ID order.

Note: Note: You cannot create a user-defined index using a multi-instance table.

Customer Setup - Indexes window



From Customers, select Set up module > General, and click Indexes

The Customer Setup - Indexes window enables you to specify up to four additional indexes. Beginning at the top, fill in the fields for Index 1, and continue down for as many of the four available indexes as you need.

When you make a change in this window, you must update the Parameters for Report Specs to make the parameters to be the same order as your indexes.

Index 1, 2, 3, and 4 Prompts

Use these fields to enter the prompts (labels) to represent the indexes in the Find window. If an index is based on a single field (rather than a field combination or formula), use the same label that represents that field on other windows or reports.

Index 1, 2, 3, and 4 Field/Forms

Use these fields to define the indexes to be maintained by specifying the exact field name or formula based on one or more field names. The field name to specify here is the internal system name for the field versus the label that displays for that field on windows and reports.

To use the fields, you have to format the field names exactly. These names need precise capitalization and punctuation: File_Name.FIELD_NAME. File names display with initial capitals (with underscores as needed), field names display in all capitals (with underscores as needed), and the two parts are connected with a period.

> **Note:** Note: You can only assign indexes to fields in the Name and single instance user-defined tables

Print button

Used to generate and send a system setting report to your report destination.

To define user-defined lookup indexes

1. From Customers, select Set up module > General, and click Indexes to open the Customer Setup - Indexes window.
2. Click Edit.
3. Enter a label in the Prompt section (Index 1, Index 2, Index 3, and Index 4) to represent the index to display in the Find window.
4. Enter the field name or formula in the Field/Formula section to define the label.
5. Click Save.

Adding and deleting fields in the change log

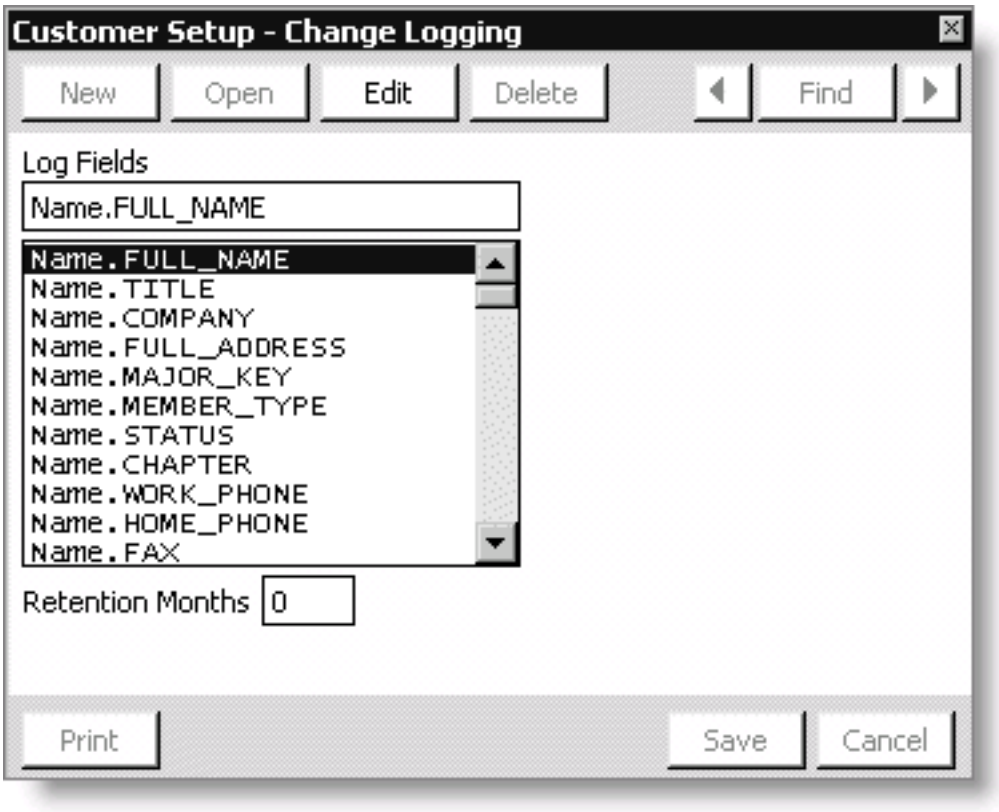
iMIS includes a change logging feature through which you can maintain before-and-after change histories for specified customer fields. While iMIS comes with a preset standard list of fields that it tracks, you can alter this list by adding or deleting fields through the Customer Setup - Change Logging window.

The only fields that can be added to change logging are:

- Any field from the Name table
- Any field from single instance user-defined tables
- The following fields from the Name_Fin table
- TAX_EXEMPT
- CREDIT_LIMIT
- BACKORDERS
- NO_STATEMENTS
- TERMS_CODE
- RENEW_MONTHS
- BT_ID
- TAX_AUTHOR_DEFAULT
- USE_VAT_TAXATION
- VAT_REG_NUMBER
- VAT_COUNTRY

> **Note:** Note: You cannot use Name_Fin.ID, Name_Fin.Renewed_Thru, or Name_Fin.TIME_STAMP in the Change Log.

Customer Setup - Change Logging window



From Customers, select Set up module > General, and click Change Logging

Log Fields

Lists the existing fields for which to track change log history.

Retention Months

Specifies the number of months you want to retain the change log history for a particular field.

Print

Generates and sends a system setting report to your report destination.

To add a field to Change Logging

Fields in the change log list must be in the format: TableName.FIELD_NAME. Most iMIS table names are spelled with initial capital letters; most iMIS field names are spelled with

all capital letters (with underscores as needed); iMIS table and field names are always connected by a period ".".

> **Note:** Note: You can only track fields from the Name and Name_Fin tables and from any single-instance user-defined table.

1. From Customers, select Set up module > General, and click Change Logging to open the Customer Setup - Change Logging window.
2. Click Edit.
3. Scroll to the bottom of the fields listed in the Customer Setup - Change Logging window, and select the space below the last field, highlighting the blank slot. The edit box at the top of the list is activated.
4. In the edit box, enter the field name you want to track in the format TableName.FIELDNAME.
5. Click Save.

To remove a field from Change Logging

1. From Customers, select Set up module > General, and click Change Logging to open the Customer Setup - Change Logging window.
2. Click Edit.
3. Scroll to and select the field you want to remove.

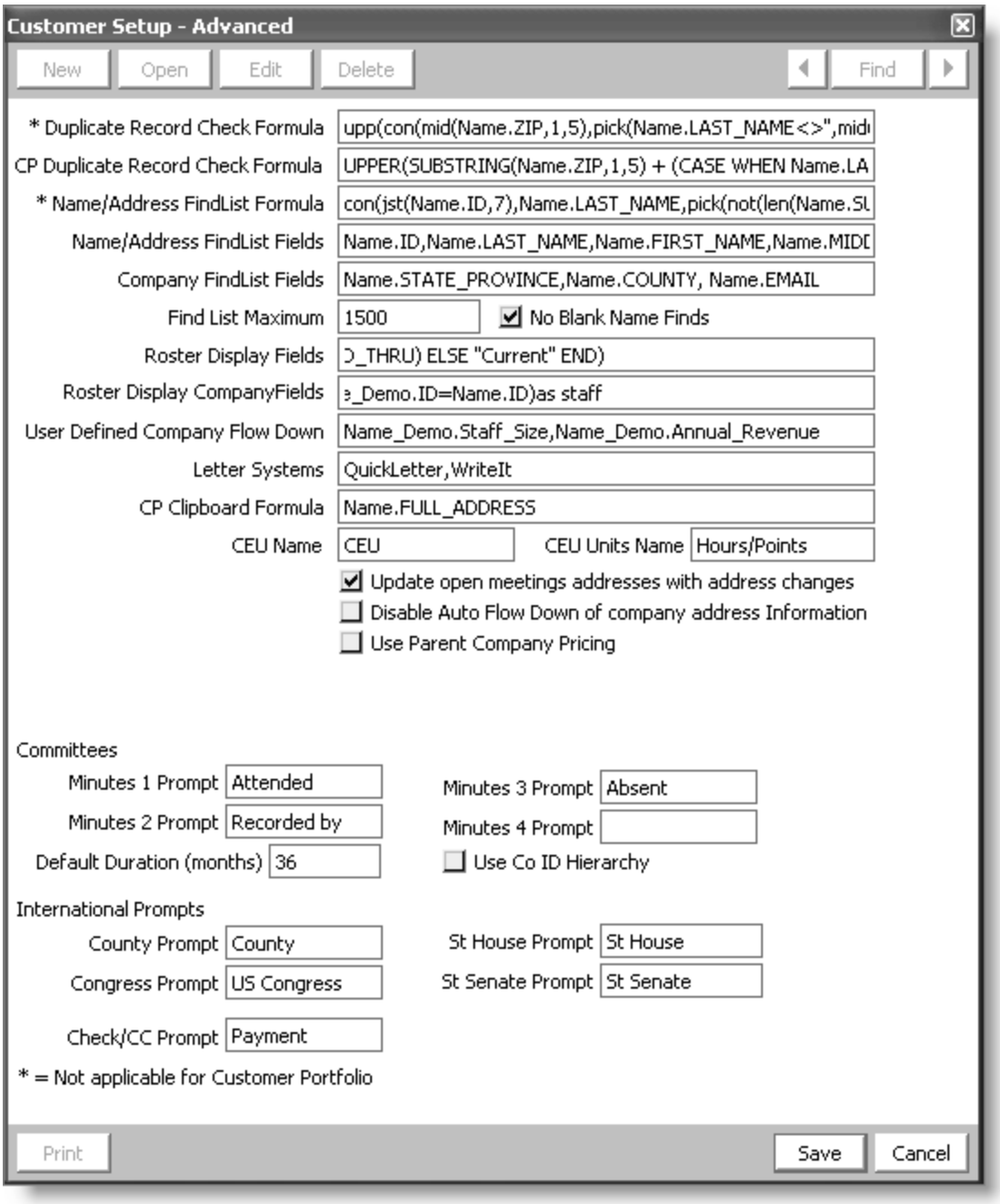
   The field name is displayed in the editing box at the top of the window.
4. In the editing box, delete the field name (press Backspace to delete the field name, or highlight the field name and press Delete).
5. Click Save.

Setting advanced customer options

The Customer Setup - Advanced window lets you enter formulas to customize the operation of the customer windows. Formulas combine fields or portions of fields according to

specified guidelines.

Customer Setup - Advanced window



From Customers, select Set up module > General, click Advanced

Duplicate Record Check Formula

Prevents duplicate records from being entered in iMIS by specifying an Omnis duplicate match key formula.

> **Note:** Note: The Duplicate Record Check formula does affect Customers. The CP Duplicate Record Check Formula governs duplicate checking within th at area.

CP Duplicate Record Check Formula

Prevents duplicate records from being entered in Customers > Manage customers by specifying a SQL duplicate match key formula.

> **Note:** Caution! To maintain data integrity, the two duplicate record check formulas must be equivalent. If the two formulas are not equivalent, duplicate record checking in Customers does not detect duplicates of entries made outside of Customers and duplicate record checking in areas other than Customers does not detect duplicates of entries made in Customers.

Name/Address FindList Formula

(required) Specifies, along with Name/Address Find List Fields, what is displayed in each line in the Find window. These lines are composed of the contents of specified fields from the Name table. This formula specifies the format for how those fields are displayed in each line.

> **Note:** Note: To have a field displayed in the Find window's display lines, include it in both the list formula and the list field.

> **Note:** Note: This field does not apply to Customers > Manage customers.

The default formula combines ID, customer name, customer type, title, and company (entity) name on each line. To improve the appearance of the output, it has provisions to print certain fields only when they have a value. If you change this formula, keep in mind

that the character limit is 255. To create space for fields you want to add, remove other fields such as Name.MIDDLE.

Name/Address FindList Fields

Specifies the fields that are displayed in the Results tab and the Record History tab of Customers > Manage customers. When you enter fields in the Name/Address FindList Fields field, use a comma to separate the fields. For example, enter Name.ID, Name.LAST_NAME, Name.FIRST_NAME, Name.TITLE, Name.COMPANY, Name.MEMBER_TYPE, Name.COMPANY_SORT to display the ID, Last Name, First Name, Title, Company, Member Type, and Company Sort for each customer record in the Results tab.

Note: Note: The following fields are required in the Name/Address FindList Fields field: Name.ID, Name.FIRST_NAME, Name.LAST_NAME, and Name.MEMBER_TYPE.

Note: Name.ID must be the first field shown in the list, and must be included even if you do not intend to display it.

Note: Note: Only fields from the Name table can be entered in the Name/Address FindList Display Fields field.

Note: Note: You must restart iMIS for your changes to take effect.

Company Find List Fields

Specifies the fields that are displayed in the Company Find window in Customers > Manage customers. This can be especially useful when you want to find a particular branch of a company.

> **Note:** Note: To include additional fields in the Results and Record History tabs, you must add the field names to the Name/Address FindList Fields configuration option, not the Company FindList Fields configuration option.

Find List Maximum

Specifies the limit on how many records the Find window locates before it stops the search. This provides a practical limit to boost performance. This maximum only comes into play when you enter non-specific selection criteria for the search that could return many or all records in the database.

No Blank Name Finds

Prevents blank space searches from being performed when selected. For example, when the option is enabled, searching for a name through the Find window requires that you enter a letter or series of letters in the Name field. When the option is cleared, searches can be completed without entering search criteria. Blank searches return all records.

Roster Display Fields

Specifies the display fields for member records (see "Customizing roster display fields") viewed in the Roster tab. Notes:

- If a customer record does not contain a value for a field specified in the Roster Display Fields field, a value will not exist for the field and the next value in the list is displayed.
- Only fields from the Name table can be entered in the Roster Display Fields field.
- You must restart iMIS for your changes to take effect.

Roster DisplayCompany Fields

Specifies the display fields for company records (see "Customizing roster display fields") viewed in the Roster tab.

User-defined Company Flow Down

Specifies the customer fields that flow down from a company (parent) record to a linked, child (non-company) record. By default, iMIS flows down main address, county, telephone, and company customer fields (as long as the user has not disabled the flowdown feature). This feature adds additional information to flow down. See also About User Defined Company Flow Down.

Note: Note: Table names in iMIS are case-sensitive. When entering fields in the User Defined Company Flow Down field, make sure the case is correct. For example, Name_Demo.STAFF.

Note: Note: Company flowdown is not implemented in iMIS web views.

Letter Systems

Specifies your preference the default tool within the standard letter system: QuickLetter or WriteIt. QuickLetter is the simplest to learn and use. It provides a quick mechanism for producing simple letters and memos. WriteIt provides traditional word processing formatting: font styles and sizes, tabs, etc.

To set your default preference, enter the keyword for your first choice followed by a comma and the keyword for the alternative; for example, QuickLetter,WriteIt.

CP Clipboard Formula

Specifies the fields that are copied to the clipboard (see "Customizing clipboard fields") when the Clipboard icon is clicked in Customers > Manage customers.

CEU Name

Specifies a label for iMIS CEU (Continuing Education Units) fields.

Note: Note: For iMIS to create activities for the label you enter in the CEU Name field, you must create an activity type with the same name on the Activity types window.

CEU Units Name

Specifies the label for the units awarded for continuing education. For example, Hours or Points. This label displays in appropriate CEU-related windows and reports.

Update open meetings addresses with address changes

Allows address changes in Customers > Manage customers to flow down to the Attendee tab on the Events > Register a customer window when selected.

Disable Auto Flow Down of company address Information

Disables the flow down of company (parent) address information to linked (child) records when selected.

Use Parent Company Pricing

Flows company (parent) pricing to linked (child) records in Orders and Events when selected. For example, if you enable this option, a non-member gets customer pricing if their parent company is a customer. This option forces iMIS to look at the company's status to ensure that they are active. It also forces iMIS to look at the customer type of the company record so it can calculate the correct pricing for the individual.

Minutes 1, 2, 3, and 4 Prompts

Specifies the labels for options that are active in the Manage committees > More > Minutes window.

> **Note:** Note: The option(s) are active in the Minutes window only when a label is entered in a Minutes Prompt field.

Default Duration (months)

Specifies the number of months that you want iMIS to use when calculating the default through date in the Manage committees window.

> **Note:** Note: To indicate that the committee appointment does not expire, leave this field blank or set it to zero.

Use Co ID Hierarchy

When selected, links a committee to the ID of a company record. A sub-set of customers associated with the company branch of the committee is created. For example, a committee called Awards has been set up. Your association has 25 branches with their own Awards committees. Normally, you would create 25 separate Awards committees with a different name for each branch. Now, you can create 25 company name records that represent each branch. You can then open the Manage committees window and set the filter to work with only one of the 25 branch company IDs. This feature also enables you to create separate customer rosters for each branch or a report of all Awards committee members regardless of branch.

You will see a Filter by Company ID option on the Manage committees window once the Use Co ID Hierarchy field has been enabled. Select Filter by Company ID to open the Find window to allow selecting a company record that represents a special division of your organization. When you make a selection in the Find window, the ID and name of the organization display in the top of the Manage committees window.

The Filter by Company ID option also filters the committee members. When an ID has been selected and is displayed in the top row of the window, inserting a new member to the committee will add the member to that company's committee.

County Prompt

Specifies the label for the County field on the Other tab.

Congress Prompt

Specifies the label for the US Congress field on the Other tab.

St House Prompt

Specifies the label for the St House field on the Other tab. (St stands for U.S. State.)

St Senate Prompt

Specifies the label for the St Senate field on the Other tab.

Check/CC Prompt

Specifies the label for the Check/CC field for all iMIS payment windows.

> **Note:** Note: The length of this field is limited to 10 characters.

Print

Generates a system setting report and sends it to your report destination.

To set up advanced options

> **Note:** Note: Advanced configuration fields are described in the topic Customer Setup - Advanced window.

1. From Customers, select Set up module > General, and click Advanced to open the Customer Setup - Advanced window.
2. Click Edit.
3. Enter your setup options.
4. Click Save.

About user defined company flow down

You can choose to have one or more customer fields flow down from company (parent) records to linked (child) records. iMIS already flows down, or synchronizes, the main address, county, telephone, and company customer type fields. This feature adds additional information to flow down.

> **Note:** Note: Do not include the Name.EMAIL field as a company flow down field because data synchronization is not properly maintained.

How company flow down works

iMIS automatically passes down key company information (main address, telephone, and company customer type) to individual customer records when the existing data matches. For example, when you edit a company's main address, iMIS checks each individual or branch record associated with that company to determine whether the main address matched the company's main address before the change was made. When it matches,

iMIS updates the individual's main address fields; when it does not, iMIS preserves the individual's main address. This flow down happens without any set up on your part.

The User Defined Company Flow Down field lets you identify extra customer data fields to be copied down automatically to the linked (child) records. This feature specifies fields in addition to the main address, telephone, and company customer type fields that iMIS inherently maintains. This feature minimizes data entry and allows you to broaden your search capabilities.

> **Note:** Note: If you are using list billing, do not enter Name.PAID_THRU in the User Defined Company Flow Down field since this may cause the parent and child records to not match.

The flow down of data to individual customers occurs whenever you edit a field in a company record that is specified in the synchronizing field.

Deciding which fields to flow down

Unlike the company name and address fields, a User-Defined Company Flow Down field will always be copied down, overwriting any existing data in the fields. Therefore, be sure to avoid selecting flow down fields that could cause you to lose data you meant to keep such as an individual's secondary address.

> **Note:** Note: Table names in iMIS are case-sensitive. When entering fields in the User Defined Company Flow Down field, make sure the case is correct. For example, Name_Demo.STAFF.

The following is the list of available fields from the Name table that you can specify to flow down from a company record to individual records.

- Name.CATEGORY
- Name.CHAPTER
- Name.COMPANY
- Name.DESIGNATION

- Name.EXCLUDE_DIRECTORY
- Name.EXCLUDE_MAIL
- Name.FIRST_NAME
- Name.FUNCTIONAL_TITLE
- Name.GENDER
- Name.INFORMAL
- Name.JOIN_DATE
- Name.LAST_NAME
- Name.MAJOR_KEY
- Name.MEMBER_STATUS
- Name.MEMBER_STATUS_DATE
- Name.MIDDLE_NAME
- Name.PAID_THRU
- Name.PREFIX
- Name.SIC_CODE
- Name.STATE_HOUSE
- Name.STATE_SENATE
- Name.STATUS
- Name.SUFFIX
- Name.TITLE
- Name.US_CONGRESS
- Name.WEBSITE

> **Note:** Note: If you enter Name.STATUS field in User Defined Company Flow Down, you must also include the Name.MEMBER_STATUS and Name.MEMBER_STATUS_DATE fields.

User-defined company flow down does not support the Work Phone, Home Phone, Fax, and E-mail fields. No error message displays if you specify these fields in the User Defined Company Flow Down field on the Customer Setup – Advanced window (from Customers, select Set up module> General, and click Advanced), but specifying these fields in the User Defined Company Flow Down field has no effect on user-defined company flow down. The Work Phone and Fax fields are part of automatic company flow down, which can be used separately or in addition to user-defined company flow down.

Customizing clipboard fields

You can choose which additional fields are copied to the clipboard when a user clicks the Clipboard icon. The default behavior is to copy the customer's Name.FULL_ADDRESS, but you can designate additional database fields to be copied.

When a user clicks the Clipboard icon, the following information is copied from the current contact's information:

- Full name followed by a carriage return
- Title followed by a carriage return
- Company followed by a carriage return

  Note: Title and Company are copied if the these options are selected in Customer Setup > Address and Notes.
- Administrator-selected fields from the following tables:
- Name
- Name_Fin
- Name_Address
- any single-instance user defined table

Configure the information that is copied to the clipboard by entering a CP Clipboard Formula in the Customer Setup - Advanced window that follows these rules:

- Fields must be named Table.FIELD_NAME and should be separated by the following special tags:
- [N] - insert a carriage return (new line)
- [C] - insert a comma
- [S] - insert a space
- [U] - convert the next field's value to uppercase
- No spaces can be included in the formula.

  For example, Name.WORK_PHONE[S]Name.HOME_PHONE not Name.WORK_PHONE [S] Name.HOME_PHONE
- Special tags must be in upper case.

  For example, [N] not [n], [S] not [s], [C] not [c], and [U] not [u].

  The following CP Clipboard Formula entry copies the customer's work phone number, adds a space, copies the home phone number, adds a comma, copies the email address, starts a new line, and copies the VAT country:

  Name.WORK_PHONE[S]Name.HOME_PHONE[C]Name.EMAIL[N]Name_Fin.VAT_COUNTRY

  Notes
- If there is no value in a particular field, it is treated as if it didn't exist in the copy to clipboard definition.
- This feature uses the same formatting conventions as International Address Formatting. See Customer Management (see "Customers") for more information.
- If you use the incorrect format in the CP Clipboard Formula field, nothing will be copied to

the clipboard when a user clicks the Clipboard icon.

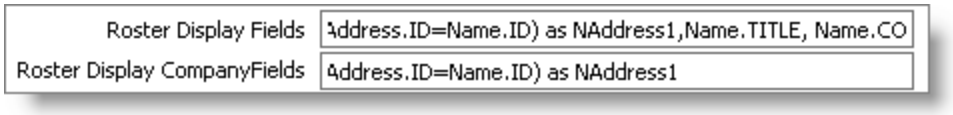
- You must restart iMIS before your changes take effect.

Customizing roster display fields

You can now configure the items displayed in the Roster listing to vary based on whether the record displayed is a member record or a company record. You can set the configuration options by selecting Customers > Set up module > General > Advanced.

The Roster Display Fields configuration option enables you to designate what is displayed when listing an individual member record in the Roster.

The Roster Display Company Fields configuration option enables you to designate what is displayed when listing a company record.

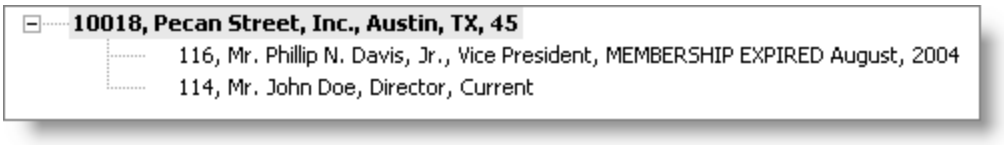


Configure the fields displayed for member and company roster listings in the Customer Setup - Advanced window.

A valid configuration line consists of a list of comma-separated field names in the format Name.FIELD_NAME, which is a maximum of 255 characters long. In addition to Name table fields, you can also include subqueries in your configuration subject to the following restrictions:

- only one value can be returned per subquery
- only one row can be returned per subquery

For example, in the configuration line Name.FULL_NAME, Name.ID,(select top 1 ADDRESS_1 from Name_Address where Name_Address.ID=Name.ID) as NAddress1,Name.TITLE, Name.COMPANY the subquery begins with "select top 1". This is necessary because the address table may have more than one address linked to a member.



Custom company and member roster display fields

Subqueries can select data from valid iMIS tables.

Example 1

The following Roster Display Fields entry displays the member's ID, full name, title (if any), and then displays either "current" or "MEMBERSHIP EXPIRED [Month, Year]" depending on the value in Name.PAID_THRU.

Name.ID, Name.FULL_NAME, Name.TITLE, (select expstat = case when Name.PAID_THRU < GETDATE() THEN "MEMBERSHIP EXPIRED " + DATENAME (Month, Name.PAID_THRU) + ", " + DATENAME (Year, Name.PAID_THRU) ELSE "Current" END)

Example 2

The following Roster Display Company Fields entry displays the company ID, name, city, state/province, country, and staff size:

Name.ID, Name.COMPANY, Name.CITY, Name.STATE_PROVINCE, Name.COUNTRY, (select Staff_Size from Name_Demo where Name_Demo.ID-D=Name.ID)as staff

Note: Note:

Roster display values assigned through a SELECT statement must be assigned a name, either by using (select [name] = ...)(shown in Example 1) or by using (select ...)as (shown in Example 2).

You must restart iMIS for your changes to take effect.

Formula for checking for duplicate records

You can create custom duplicate match key formulas to prevent the entry of duplicate customer records in the Name table. One formula, the Duplicate Record Check Formula, affects records entered anywhere in iMIS except in Customers > Manage customers. The CP Duplicate Record Check Formula is specific to Customers > Manage customers. In order for duplicates to be detected properly, these two formulas must be equivalent.

Your formulas can combine fields or portions of fields to compare a record being entered against records that already exist in the database. When a possible match is found, iMIS presents a match list and warns the data entry user that the record may be a duplicate. Based on this information, the user can continue or can cancel the insertion.

Default formulas

The default CP Duplicate Record Check Formula specifies the same criteria as the Duplicate Record Check Formula, but uses SQL instead of Omnis.

By default, the Duplicate Record Check Formula field contains the following Omnis formula:

upp(con(mid(Name.ZIP,1,5),pick(Name.LAST_NAME<>",mid(Name.COMPANY,1,5),-con(mid(Name.LAST_NAME,1,4),mid(Name.FIRST_NAME,1,1)))))

By default, the CP Duplicate Record Check Formula field contains the following SQL formula:

UPPER(SUBSTRING(Name.ZIP,1,5) + (CASE WHEN Name.LAST_NAME<>'' THEN (SUBSTRING(Name.LAST_NAME,1,4) + SUBSTRING(Name.FIRST_NAME,1,1)) ELSE SUBSTRING(Name.COMPANY,1,5) END))

Note: Caution! If you customize the Duplicate Record Check Formula and CP Duplicate Record Check Formula ensure that the formulas contain equivalent selection criteria. Although it is possible to specify different criteria in these fields, if you do not use equivalent formulas, identical records entered through different

modules will end up with different duplicate match keys and will therefore not be identified by iMIS as potential duplicates.

When entering a custom formula in the CP Duplicate Record Check Formula field, the formula can contain up to 255 characters, and the resulting duplicate match key can contain up to 20 characters. You can use the following Name fields when entering a custom duplicate check formula in the CP Duplicate Record Check Formula field:

Name.FIRST_NAME	Name.LAST_NAME
Name.COMPANY	Name.ZIP
Name.CITY	Name.STATE_PROVINCE
Name.COUNTRY	Name.ORG_CODE
Name.MEMBER_TYPE	Name.MAJOR_KEY
Name.WORK_PHONE	Name.HOME_PHONE
Name.FAX	Name.EMAIL
Name.COUNTY	Name.TOLL_FREE
Name.CHAPTER	Name.JOIN_DATE
Name.BIRTH_DATE	Name.GENDER

Note: Note: This facility cannot protect against all data-entry problems, such as address changes, variable name spellings, and typing errors. For best results, use standard lookup before adding questionable database records.

Example duplicate record check formulas

The following CP Duplicate Record Check Formula and Duplicate Record Check Formula specify a duplicate match key using the first three digits/characters of the zip code, the first four characters of the last name (if one exists), the first character of the first name, or if the customer did not have a last name, the first five characters of the company name:

CP duplicate record check formula

UPPER(SUBSTRING(Name.ZIP,1,3) + (CASE WHEN Name.LAST_NAME<>'' THEN (SUBSTRING(Name.LAST_NAME,1,4) + SUBSTRING(Name.FIRST_NAME,1,1)) ELSE SUBSTRING(Name.COMPANY,1,5) END))

Duplicate record check formula

upp(con(mid(Name.ZIP,1,3),pick(Name.LAST_NAME<>'',mid(Name.COMPANY,1,5),-con(mid(Name.LAST_NAME,1,4),mid(Name.FIRST_NAME,1,1)))))

For customer Diane Block with an address of 500 Main Street, Austin, Texas 78708, the following duplicate match key would be created:

787BLOCD

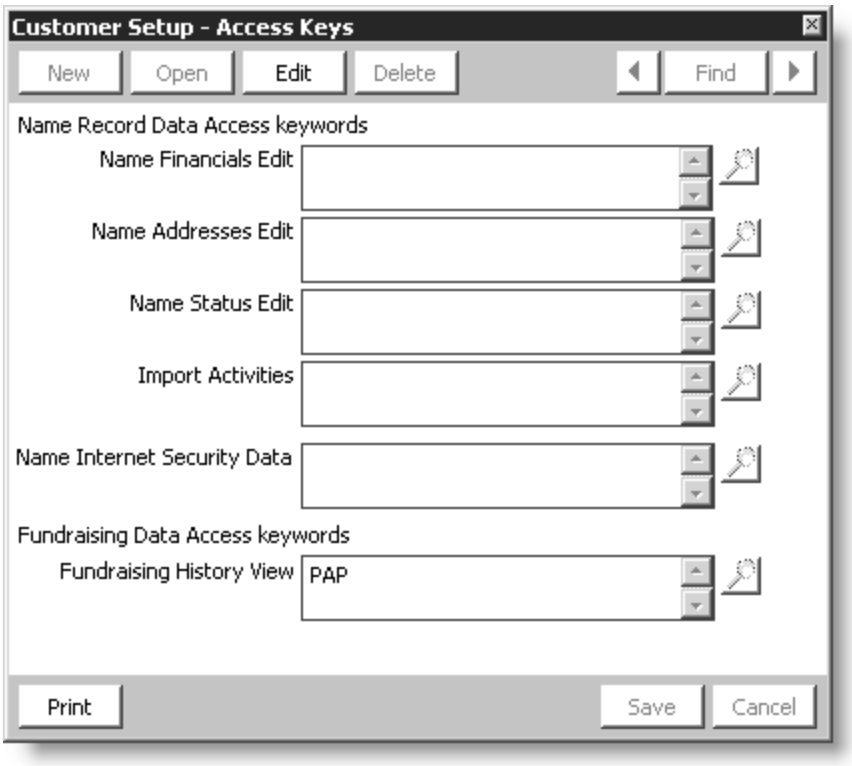
Customer Setup - Access Keys window

This window defines access keys that an administrator can assign to selected iMIS users for authorizing them to view and edit customer information such as fundraising or financials.

Note: Note: Prior to selecting these Access Keys, an administrator must set ACCESS_KEYWORDS in Customers > Set up tables > General lookup/validation.

Note: Note: After you assign the access keywords in this window, users cannot edit certain areas of customer data unless the user has been assigned at least one of the access keywords through the Customers > Set up module > General > Access Keys area.

Note: The authorization limit views in iMIS only, these access keys do not authorize or limit direct access to the database.



Customers > Set up module > General, and then click Access Keys

Name Record Data Access keywords

This area specifies access for financials, addresses, status, and whether the user can import activities.

- Name Financials Edit - When you assign an access keyword here, the user cannot edit customer financial data.
- Name Addresses Edit - When you assign an access keyword here, the user cannot edit customer addresses.
- Name Status Edit - When you assign an access keyword here, the user cannot edit customer status data.
- Import Activities - Limits access to activity import functions but only if other prerequisites are in place. Access controls whether the Input from Query and Transformation Query fields on the Import activities window are enabled.
- Name Internet Security Data - Limits access for changing passwords or revoking access.

This area specifies access for fundraising information on individuals.

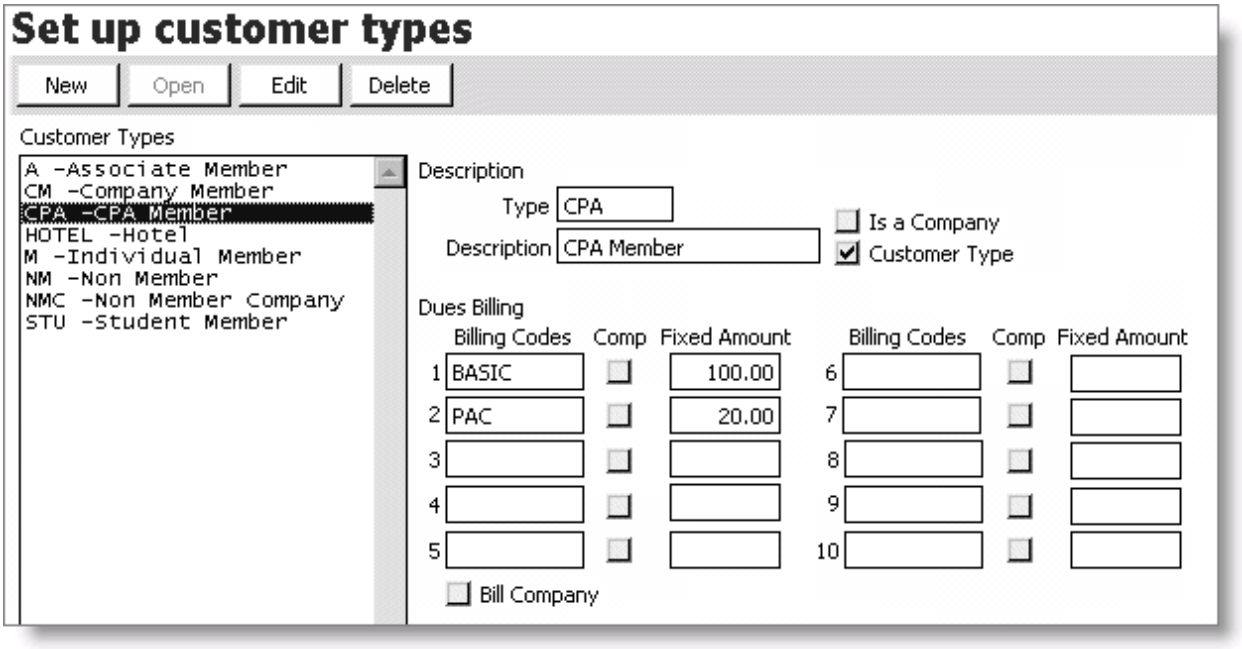
- Fundraising History View - When you assign an access keyword here, the user does not see a Fundraising tab on the Customer tab.

Defining customer types

The Customer types window defines the categories to which you assign each customer record. These types designate the broad classification of customer categories. Assign a different type to each major customer class (Individual Member, Associate Member, Student Member, Hotel, etc.) and at least one type to the Nonmember category.

When you define a type through the table, be sure to indicate whether the type represents a customer and whether the type defines a company/entity or an individual. This helps iMIS differentiate between the different records.

Customer types window



From Customers, select Set up module > Customer types

Customer Types

Lists the codes and descriptions for the defined customer types.

Type

Specifies a unique code to represent a specific grouping (Max. characters 5). This code corresponds to the Type field in the Manage customers window.

Description

Specifies the descriptive, full name of the customer or nonmember group that corresponds to the abbreviated type code you assigned. This description displays in the drop-down list on the Manage customers window. If the Description field does not contain a value, the value in the Type field is used.

Is a Company

Enable to indicate that the customer type you are defining represents companies or other entities rather than individuals. By enabling this option, iMIS will be able to maintain relationships between companies and individuals for the purpose of maintaining current company rosters and other related lists.

Is a Member

Enable to indicate that the group represents a customer category rather than a nonmember. By enabling this option, iMIS can distinguish between members and nonmembers regardless of how many types or categories you maintain. This provision lets you produce quick lists, reports, and counts by members or nonmembers.

Billing Codes

Use these fields to enter up to 10 product codes for each customer type. These entries dictate the dues products that automatically will be billed for each customer type. Only link dues products that should be billed to all members within the type. Do not enter add-on products that are optional or vary from member to member.

All codes entered here display on dues bills for this customer type unless the line item bills at zero dollars and the renewal notice option to suppress the printing of zero balance line items is active.

The first product cross-referenced is the key product because it controls the advancing of the overall membership paid thru date. For best results, enter the primary dues product code in the first Billing Codes field.

> **Note:** Note: Unless all line items for the type are complimentary or are to be billed zero dollars, do not insert a product in the first line that will have a zero price amount such as a complimentary product. When a product line item is billed and a zero amount has been set, the paid thru date will automatically advance.

Comp

Enable if the dues item will be provided at no charge for this customer type.

Fixed Amount

Specifies a fixed rate that applies to all or most customers of this type.

Bill Company

Enable if the parent company is to receive the bill for customers of this customer type that are linked to it; for example, if a List Bill requirement exists.

Print

Used to generate and send a customer type table report to your report destination.

To define customer types

1. From Customer types window, click New.
2. Enter a meaningful, unique code to represent a specific grouping in the Type field.
3. In the Description field, enter the descriptive, full name of the customer group that corresponds to the code you assigned in the Type field.
4. (optional) If the customer type you are defining represents a company or entity other than an individual, enable the Is a Company option.
5. (optional) If the customer type you are defining represents a member rather than a non-member category, enable the Is a Member option.

6. Click Save.
7. Exit iMIS.

To add billing codes to customer types

1. From Customer types window, click New.
2. Enter a meaningful, unique code to represent a specific grouping in the Type field.
3. In the Description field, enter the descriptive, full name of the customer group that corresponds to the code you assigned in the Type field.
4. (optional) If the customer type you are defining represents a company or entity other than an individual, enable the Is a Company option.
5. (optional) If the customer type you are defining represents a member rather than a non-member category, enable the Is a Member option.
6. (optional) Enter the Billing Codes that were set on the Set up products window (from Billing, select Set up module > Products). These entries dictate the dues products that will be automatically billed for each customer type. Only link dues products that should be billed to all customers within the type. Do not enter add-on products that are optional or that vary from customer to customer.

   Caution! Unless all line items for the type are complimentary or are to be billed zero dollars, do not insert a product in the first line that will have a zero price amount, such as a complimentary product. When a product line item is billed and a zero amount has been set, the Paid Thru date will automatically advance.

1. Enable the Comp option if the dues product will be provided at no charge (complimentary) for this customer type.
2. Enter a Fixed Amount if a fixed rate applies to all or most customers of this type.
3. Enable the Bill Company option if the parent company is to receive the bill for customers of this customer type that are linked to it.

7. Click Save.
8. Exit iMIS.

To use wildcard product codes to update PAID_THRU date

A special wildcard option enables you to control the overall customer term Paid Thru date when there is not a single main dues product (the product that is listed first on the Customer types window) to be billed for the customer type. In order to use the wildcard feature, all potential products, which may be used to control the customer term Paid Thru date, must be established with the same initial string of characters in their product codes. A partial product code string followed by % designates a wildcard in the first product code slot on the customer types table. This option allows different products to be the main dues product for one customer type. This feature enables ties to use dues product billing and to control the customer Paid Thru date even when there is not a consistent dues product billed to all customers.

Example

An organization bills only chapter dues products and the chapter codes vary from customer to customer. In this case, CHAPT% would be entered in the first Billing Codes field on the Customer types window because all chapter product codes automatically begin with CHAPT (for example, CHAPT-HARRIS, CHAPT-TRAVIS). Payment of the first product whose code begins with the wildcard string will update the overall customer term or name PAID_THRU date. An example of a wildcard used on the Set up customer types is shown in the following picture with the corresponding product code defined on the Set up products window (see Defining Product Codes) In this case, only chapter dues products are billed. Customers can join from a group of chapters. In this example, the wildcard option is used for all chapters that begin with CHAPT.

Note: Note: The customer's overall Paid Thru date will be advanced the first time a payment is fully applied to a line item whose product code begins with CHAPT.

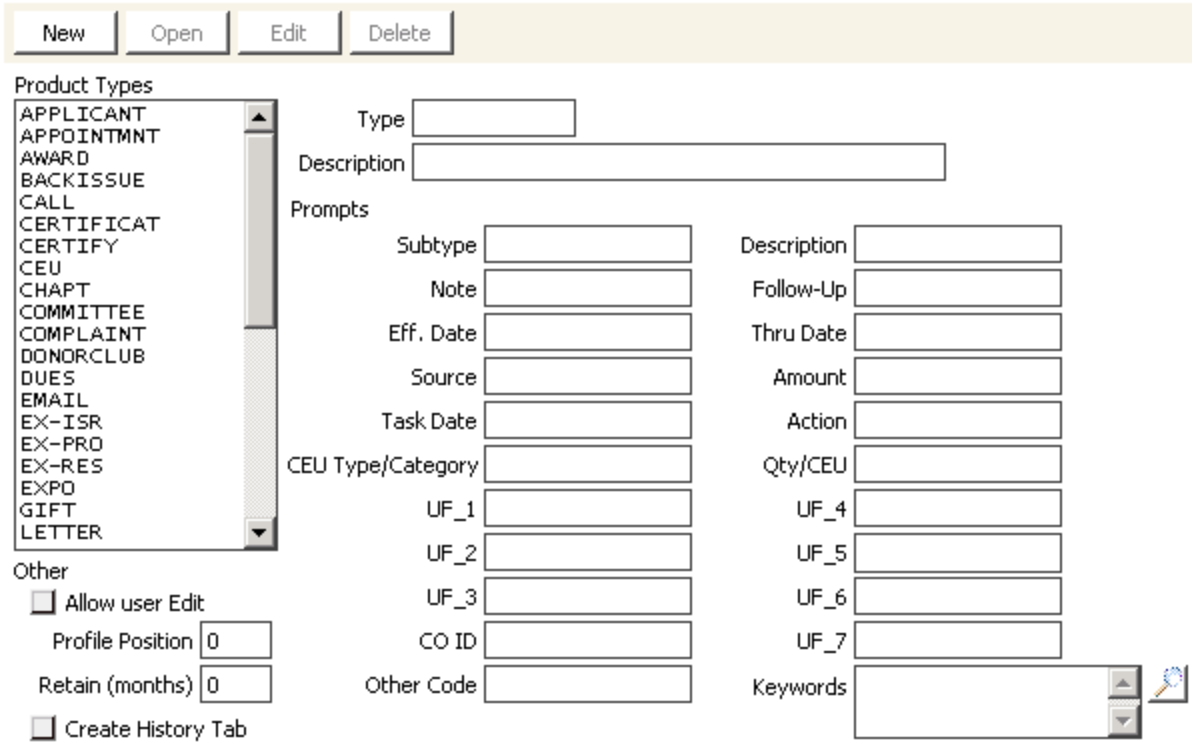
Implementing and managing activity types

The Activity Detail window contains both standard and user-defined fields. These fields are assigned according to your organization's needs and are set up in the Activity types window. You establish which fields are displayed for a given Activity Detail window.

> **Note:** Note: When creating an activity type you must enter a value in the Type and Description fields, and you must define at least one field prompt.

See the Fundraising Administration section for details about Setting up Request, Gift, and Pledge activity types.

Activity types window



Admin Console: Configure > Membership > Set up activity types

Desktop: Customers > Set up module > Activity types

Product Types

The Product Types field lists the activity types. iMIS comes with default activity product types which may be edited to include additional fields or to change field labels. Additional activity product types may be defined.

Type

(required) Specifies the activity category or code that corresponds to the code in the Activity Types table. This code determines which fields are used in the Activity Detail window and cannot be changed once the record is stored.

Description

(required) Describes the activity type.

Subtype

Specifies a sub-type of the activity type. The Subtype field enables you to sub-categorize the activity type. For example, a product code is a sub-type of the activity type Sales.

Description

Describes the sub-type. If this field is activated, a text box is created within the Activity Detail window that enables up to 255 characters of text.

Note

Specifies notes you want to keep. If activated, a large text box is created within the Activity Detail window that enables up to 32,000 characters.

Follow-Up

Specifies follow-up comments. If activated, a large text box is created within the Activity Detail window that enables you to enter up to 32,000 characters.

Eff Date

Specifies an additional date field (The activity date is system generated). Used if another date field is necessary for the activity. For example, for tracking the begin date of a committee appointment.

Thru Date

Specifies an end date. For example, the ending date of a committee appointment.

Source

Specifies either a marketing code, or an individual to which an item will be assigned. For example, if an order sale is made over the phone, the code used to track this information might be Phone. Codes may be set up for advertising, catalogs, salespeople, etc.

To track the source of Event registrations, enter Source in this field. This activates the Source lookup field on the Register for an Event window's Overview tab.

> **Note:** Note: For task or call logging activities, the name or user ID for which this reminder should be logged is entered in the Source field. If Assigned To is entered in this field, the lookup feature is available for all user IDs. If the field is blank, the reminder message will display in all users' task activities.

Amount

Specifies a monetary amount for the activity.

Task Date

Specifies the date on which an activity record will be displayed in the user's task list (user defined in Source).

Action

Specifies the type of action taken on a task item.

CEU Type

Specifies the type or category of educational credit awarded (With CEU add-on module only).

Qty/CEU

Specifies the number of credit hours awarded for a CEU course, or specifies the frequency of a recurring request.

> **Note:** Note: For SALES and ORDER activity types, the system stores the value entered in the Qty/CEU field in Activity.QUANTITY. For all other activity types, the system stores the value entered in the Qty/CEU field in Activity.UNITS.

UF_1, UF_2, and UF_3

Specify user-defined character information, that will be displayed in the bottom half of the Activity Detail window. For example, the GIFT and PLEDGE activities define these fields as List As, Campaign Code and Fund Code.

UF_4 and UF_5

Specify user-defined numeric information.

UF_6 and UF_7

Specify user-defined date information. For example, the REQUEST activity defines these fields as End Date and Last Reminder.

CO ID

Specifies an ID number. For example, the REQUEST, GIFT, and PLEDGE activity types define this field as Solicitor ID.

Other Code

Not implemented

Keywords

Specifies a keyword to restrict access to this type of activity record.

Allow user Edit

When selected, enables users to edit detailed activity records of this type.

Profile Position

Specifies the order in which you want this type of activity to be printed on the customer profile report. If this field is left blank, the activity type will not be printed on the customer profile report.

Retain (months)

Specifies the number of months you wish to retain this type of activity record. Items older than the retention period are deleted when your system administrator purges old activities.

Create History Tab

When selected, creates a new tab for this type of activity in the Customer Portfolio. The tab will contain a New Activity button that enables you to enter new activities of this type, provided that you have also selected the Allow user Edit checkbox.

Tab Name

(Displayed only when Create History Tab checkbox is selected) Specifies the name of the Customer Portfolio history tab that shows this type of activity.

> **Note:** Note: The activity tab will not be displayed in the history area of the Manage customers window until you select the tab from the Customer Portfolio Tab Preferences window.

Print

Generates and sends a customer type table report to your report destination.

> **Note:** Note: The Type, Subtype, and user-defined character fields can have a general lookup/validation table. The table can vary by activity type. For example, the CALL sub-type might generate a list of CALL types such as question, problem, or other while the EXPERIENCE activity sub-type might generate a list of experience subtypes such as work experience, academic, etc.

To create an activity type

1. From Activity types window, click New.
2. Enter the activity category or code in the Type field.
3. Enter a Description of the activity type.
4. Enter additional prompts, if needed.
5. Click Save to update the activity type.

To edit an activity type

1. From Activity types window, select an activity from the Product Types column.
2. Select the activity to open it in the Activity types window.
3. Click Edit.
4. Make any necessary edits.

   Note: The Type field cannot be edited.
5. Click Save to update the record.

To delete an activity type

1. From Activity types window, select an activity from the Product Types column.
2. Select the activity to open it in the Activity types window.
3. Click Delete. A system message prompts you to verify the deletion of the selected record.
4. Click Yes.

To create the LETTER activity type

1. Create a new activity type using the following settings:

- Type: LETTER
- Prompts for Description, Note, and Source.
- Additional prompts, if needed.

Note: The prompts entered in the Activity types window dictate which fields are enabled and visible in the Activity Detail and Activity Importer windows.

2. Click Save to update the activity type.

To display activity records in customer profiles

You can configure an activity type to be displayed in customer profiles. If a customer does not have an activity record for a particular activity type, then that activity type will not be displayed in the customer's profile. Activity records are grouped according to type, and you can specify the order in which the activity types display.

1. From Activity types window, select an activity type from the Product Types list.
2. Click Edit.
3. Enter a Profile Position to display the activity type and related activity records. You have several options:

- To not display an activity type and its related activity records, enter a Profile Position of zero. The default Profile Position is zero.
- To display an activity type and its related activity records in the customer's profile, assign a number greater than zero to the Profile Position to display the activity type. For example, enter a 1 for the Email activity type.
- To sort the order in which the activity types display, enter numbers in succeeding order for each activity type. An activity type with a Profile Position of 1 will display ahead of an activity type with a Profile Position of 2, and an activity type with a Profile Position of 2 will display ahead of an activity type with a Profile Position of 3.

  For example, if you want the customer's Call Log activity records to display first in the customer's profile and the customer's Award activity records to display second, enter a 1 for the Call activity's Profile Position and a 2 for the Award activity's Profile Position.
- To order the activity types alphabetically, assign the same Profile Position to each activity type. For example, enter a 1 for each activity type's Profile Position.

4. Click Save.

Creating tabs for activity types

You can create a History tab for specified activity types and display it according to your tab preferences.

To create a tab for an activity type

1. From Activity types window, select the activity type from the Product Types scrolling list.
2. Enable the Create History Tab option. The Tab Name field displays to the right of the Create History Tab option after the Create History Tab option is enabled.
3. Enter the tab name in the Tab Name field.
4. (optional) Enable the Allow user Edit option if you want to allow iMIS users, with a Customers authorization level of three (3) or higher, to edit the data on the Manage customers window.
5. Click Save to update the activity type.
6. Restart iMIS.

To display an activity tab

1. On the Manage customers window, place the cursor over the detail or history tabs, right-click, and select Edit Tab Preferences.

   The Customer Portfolio Tab Preferences window opens.
2. Select the History tab.
3. Move the new activity tab to the Visible History Tabs list.

   Note: The tab is initially placed at the end of the Visible History Tabs list. You can move the tab to the desired position by selecting the tab and clicking the Top, Up, Down, or Bottom buttons.
4. Click Save to update the tab preferences profile.
5. Restart iMIS.

Activity attachments

In some cases, you may want to attach a file to an activity record.

To enable the activity attachment feature

> **Note:** Note: Some activity types are system-generated (for example, Order) and are not intended for editing. However, if you want to attach a file to one of these activity types you must enable the Allow user Edit option. Enable the Allow user Edit option on the Activity types window.

1. Select File > System Setup to open the System Setup window.
2. Click Edit.
3. Enable the Activity Attachments allowed option.
4. Enter a value in the Maximum file size (KB) field. See Specifying maximum size of activity attachments for more information.

   A message informs you that the maximum file size you specified may not be practical and may have adverse effects on performance.
5. Click OK.
6. Click Save.

Activity attachment fields

To support the activity attachment feature, the following fields in the Activity_Attach table are used:

ACTIVITY_SEQN	long integer	Used to store a reference to an associated activity record
FILE_NAME	varchar (255)	Attachment's file extension
FILE_	Datetime	Date the attachment was last modified

TIMESTAMP		
ATTACH_IMAGE	image	File's binary data
INTENT_TO_EDIT	varchar (40)	Indicates whether a user has started an edit operation (Date/Time + "#" + <User ID>)
READ_ONLY	Boolean	Indicates whether the attachment is available for editing by non-administrator users

To purge activity attachments created before a specified date

To delete activity attachments with a timestamp before a specified date, you must modify the Purge old Activity attachments report spec to include a date in the purge script from which you want to delete activity attachments, and then run the purge script.

Note: Note: You must have an authorization level of 8 or higher to modify a report spec.

Note: Note: The FILE_TIMESTAMP date that you modify in the purge activity attachment script refers to the date that displays in the File Date column on the Activity Attachment window for the attachment. The File Date displays the date the attachment was last modified. However, if the attachment has not been modified, the date that displays corresponds to the date the file was created.

1. Select Utilities> Report Specs to open the Report Specifications window.
2. Scroll down to the SYSTEM module.
3. Select the SYSTEM-Purge-Purge old Activity attachments report.
4. Click Parameters to open the Detail Report Parameters window.
5. Click Edit.

6. Using the format YYYYMMDD, modify the FILE_TIMESTAMP value of the Purge old Activity attachments script. In the following example, the script has been modified so that activity attachments with a File Date earlier than October 10, 2002 will be deleted:

   delete Activity_Attach where FILE_TIMESTAMP< '20021010' and ACTIVITY_SEQN> 0 and READ_ONLY=0

7. Click Save.
8. Select Utilities> Reports and Queries.
9. Select Purge from the Report Types scrolling list.
10. Select Purge Old Activity attachments from the Available Reports scrolling list.
11. Click Run. A message displays informing you that you should make a backup of your database before running the activity attachment purge utility, and asks if you want to continue running the utility. Click Yes to continue running the utility, or No to cancel.
12. The Purge old Activity attachments window displays showing the number of attachments that were deleted from the iMIS database.

> **Note:** Note: In an environment where users are importing activities simultaneously, you must ensure that the users do not attempt to import the same files or run the same queries. To prevent a user from inadvertently affecting records another user is processing, you can limit access to the advanced Activity Importer features so that processing is restricted to records imported by a user's specific session.

Creating mailing and address lookup and validation

The Label Preferences tab enables you to select specific label addresses for any mailing label on a per-customer basis.

To enable product label preferences

The Label Preferences tab enables you to select specific label addresses for any mailing label on a per-customer basis. Before inserting product label preferences, you must enable the Use Product Label Preferences option.

1. From Customers, select Set up module > General, and click Address and Notes to open the Customers Setup - Address and Notes window.
2. Click Edit.
3. Enable the Use Product Label Preferences option.
4. Click Save to update the record.
5. Close iMIS Desktop to enable Use Product Label Preferences.
6. Ensure that your iMIS Administrator stops and restarts all websites that contain your iMIS 15 applications.

   If restarting the websites is problematic, you can wait for the cache to refresh (default is 15 minutes wait time, designated by the refresh cache interval) and then your changes appear.

   Note: Upon enabling Use Product Label Preferences, the Product Label Preference table activates, allowing you to create user-defined label codes. The Label Preferences tab displays on the Manage customers window when you enable this feature.

   To insert product label preference codes

1. From Customers, select Set up product label preferences to open the Set up product label preferences window.
2. Enter new codes:

- Click New.
- Enter a code for the label in the Code field and a name for the label in the Name field.
- Click Save.
- Repeat until you have entered all of the codes.

iMIS Customizer

The iMIS Customizer (Customer Setup – Additional Windows window) makes customization easy for both programmers and non-programmers. Through the Customizer,

users can create user-defined tables. The tables contain user-defined data fields that store data that is captured and displayed in user-defined or custom tabs.

Customizer features include the following:

- Customization of iMIS customer data
- Automatic and custom tab layout for capturing and displaying data
- Data lookup and validation
- Different demographics for different customer types
- Multiple instances of each window for each customer
- Custom fields with user-assigned names

> **Note:** Note: Excessive customization may slow processing when users log on to iMIS.

Custom table features

- Fields organized into multiple SQL tables
- Tables designed so that different customer types have unique demographic fields and tabs
- Option provided to have “multiple instances” of a table row for a single ID
- Table used for dues pricing identified and included in the Name_All view

Custom field features

- Create any number of custom fields
- Assign any valid SQL name (not just UF_1, UF_2...) to fields
- Designate a custom prompt for each field
- Use a wider variety of field types: characters, notes, numbers, integers, checkboxes, date, time, date/time

- Assign validation and lookup tables for single or multiple values
- Designate uppercase or upper/lower (title case) auto-formatting

Custom tab features

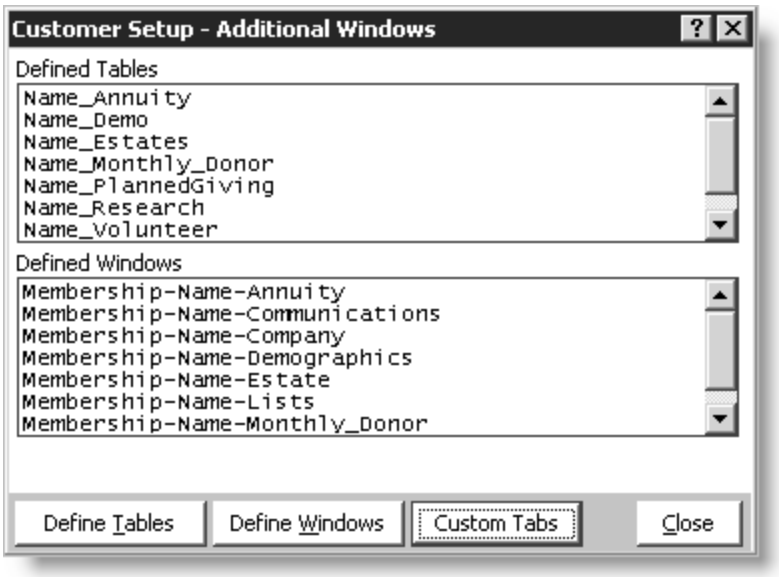
- Organize fields into multiple tabs
- Define your own layout and content for each tab; easy layout/definition process
- Mark tab fields as “display only”
- Provide different demographic subsets for different tabs (for example, for each department)
- Designate tab fields and data to display on customer profile reports
- Provide for "tab level” security; access modes include full, view only, and none (see Limiting Access and/or Hiding Tabs).

Apply demographics to a new task

The unprecedented flexibility in field, table, and page configuration allows you to implement many optimized uses for iMIS:

- Separate individual customer demographic data from organizational demographic data
- Define specific demographic data for different companies and organizations
- Define specific demographic data for special customers, such as chapters, legislators, and advertisers
- Define specialized window tabs for surveys and other detailed information

Customer Setup - Additional Windows window



Customers > Set up module> General, and click Additional Windows

Defined Tables

Displays existing user-defined tables. You can have an unlimited number of tables with many user-defined tabs accessing the same table.

Defined Windows

Displays existing user-defined tabs.

Define Tables button

Opens the User Defined Tables window used for defining tables.

Define Windows button

Opens the Window Designer window used for creating user-defined tabs.

Custom Tabs button

Opens the Custom Tab Designer window used for creating custom tabs.

To access the Customizer

Before you begin configuring your user-defined tables and user-defined tabs, be sure to launch iMIS in the proper mode for system alteration.

1. Make sure all other users exit the iMIS system.
2. Back up your data.
3. Log onto iMIS as MANAGER.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.

Creating a user-defined table

To add a user-defined demographics tab, you first need to name and define its data table, unless a previously defined table contains the fields you want to add to the tab you are designing.

If you want to display the data from this newly designed table, after the table is defined, create the tab, and add the data fields that you want to display on the tab. Here's an overview of the process:

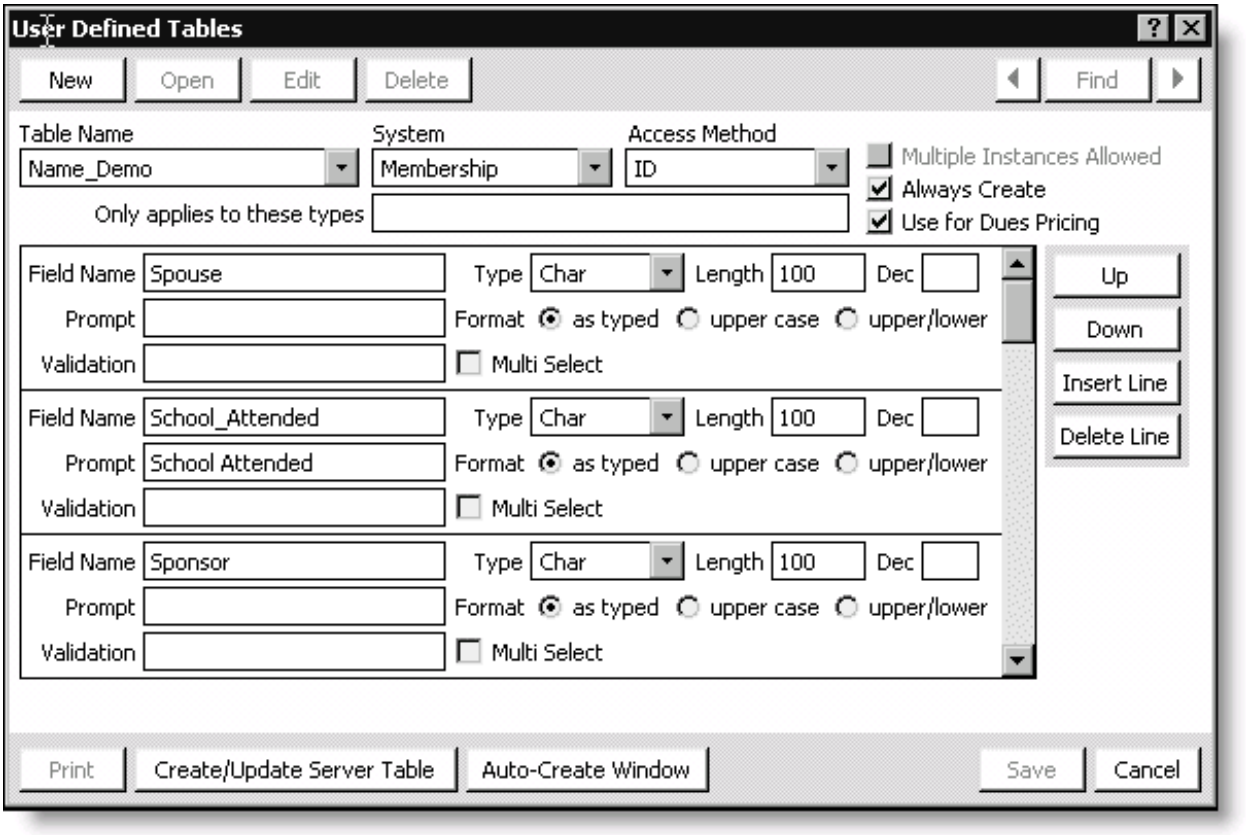
1. Create the table (see "To create a user-defined table") and add the fields.
2. Create a window (see "To create a user-defined tab") - either auto-created or create your own.
3. Use the Build command in Tools > User defined tables > Build to build the underlying business object.
4. Add the window to user tab preferences (see "To create custom tabs").
5. Enter data for members and then the definition is complete.

> **Note:** Note: Lookup is unavailable for numeric user-defined fields. When defining a field that uses a general lookup/validation table, make sure you do not assign a numeric Type to the format (for example, a number).

Note: Note: If you assign a numeric Type format to a field, iMIS automatically formats the numbers entered in the field with commas. If you do not want a user-defined field to be automatically formatted, assign the data type to Char.

User Defined Tables window

The User Defined Tables window is used to create new tables, add data fields, and modify existing tables.



From Customers, select Set up module> General, click Additional Windows, and click Define Tables

Table Name

Specifies the name of the table you are creating. Use an underscore (_) to separate words; do not use spaces.

System

(Not currently in use) Accept the default (Membership).

Access Method

(Not currently in use) Accept the default (ID).

Multiple Instances Allowed

Enable to allow multiple instances of each user-defined tab for each customer. For example, if you create a Survey tab for the year 2003 and want to re-use it in succeeding years, this feature allows customers to enter information in the same tab, using the same customer ID, for each year.

When creating multiple instance of a user-defined tab, a unique identifier is not required. However, we recommend using the first field as a unique identifier or key field that allows you to stack the data. When Multiple Instances Allowed is enabled, and you designate the first field as a key field, the first field Type must be designated as character (Char). The first field also should be a field that will designate the instance. For example, if you set up a tab for customer surveys, you would want to use SURVEY_YEAR as your first field.

If you select the Auto-Create Window option after defining a tab, iMIS automatically creates a tab with the tab title based on the table name. iMIS defines the table layout and includes all the fields with the Field Name used as the field label.

Always Create

Enable to create records automatically according to the Access Method selected for the appropriate customer types. Make sure to enable this option if the table contains fields used for Dues special pricing.

Use for Dues Pricing

Enable to use the table for Billing special pricing.

Note: Note: If the Always Create and Use for Dues Pricing options are enabled, the Name_All view is automatically created when you click Save.

Only applies to these types

Specifies specific customer types (separated by commas) if you want to restrict availability to a demographic table. Do not use this option if you plan to use the table for Billing special pricing.

Field Name

Use to define a SQL field name. Use an underscore (_) to separate words; do not use spaces.

Type

Select a field type from the drop-down list to define the field format: character, integers, numbers, money, checkboxes, date, time, date/time, and image. (Defaults to character.)

> **Note:** Note: Lookup is unavailable for numeric user-defined fields. When defining a field that uses a general lookup/validation table, make sure you do not assign a numeric Type to the format (for example, a number).

Length

Use to define the size of a character type field, for example, 20 characters.

Dec

Use to define the number of decimal places for specific field types.

Prompt

Specifies the field label you want displayed on the tab. (Defaults to the Field Name. For example, if the Field Name is TEST_EXAMPLE, the Prompt defaults to Test Example.)

Format

The character format option allows you to select an auto capitalization option: as typed, upper case (for codes), and upper/lower case (for titles). If you select upper case or upper-/lower, the character format will be auto-corrected. (Defaults to as typed.)

Validation

Specifies which general lookup/validation table to use for data entry. You must refresh the libraries to see the defined values when using the lookup feature on a user-defined field. (Defaults to all caps, exact spelling.)

> **Note:** Note: Lookup is unavailable for numeric user-defined fields. When defining a field that uses a general lookup/validation table, make sure you do not assign a numeric Type to the format (for example, a number).

Multi Select

Enable to allow users to make more than one selection from the validation table.

> **Note:** Note: When creating a general lookup/validation table for a multi-select field in a user-defined table, the Description field on the Set up general lookup/validation window must contain a unique value for each Code.

Up button

Used to move the selected field up in placement.

Down button

Used to move the selected field down in placement.

Insert Line button

Used to insert a new field.

Delete Line button

Used to delete an existing field.

Create/Update Server Table button

Used to update the selected table.

Auto-Create Window button

Used to create a user-defined tab automatically with the title based on the table name. iMIS defines the table layout and includes all of the fields with the Field Name used as the

field label. Use the automatic window creation feature when you add a new user-defined table or make changes to an existing user-defined table (for example, if you add or delete a field from a user-defined table).

To create a user-defined table

ID_207232 - no need to refresh libraries

A table is made up of data fields. You define your table's data fields so users can enter or select specific data in user-defined or custom tab.

> **Note:** Caution! Take a snapshot of your database with customizations. All customized objects (triggers, additional indexes, special permissions) are lost when user-defined tables are rebuilt.

1. Have all users exit iMIS.
2. Back up your data.
3. Log into iMIS as the database owner.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.
5. Click Define Tables to open the User Defined Tables window.
6. Click New.
7. Enter a new Table Name. The table names are case-sensitive, so plan to use ALL CAPS or Initial Caps consistently. Table names must be unique:

- Unique name across iMIS: Make sure any table or field you add does not match the name of any other iMIS table or field or any of the SQL Reserved Words. If you enter an iMIS table name, you are warned that the iMIS table may be overwritten.

8. Press Tab. When iMIS prompts you to verify the table creation, click Yes.

   Note: The scrolling list box of field entries is cleared until you complete the table's heading fields.

9. Accept the System and Access Method defaults.
10. (optional) Enable the Multiple Instances Allowed option if you want customers to have more than one user-defined tab that will contain the same fields, for example, quarterly or annual surveys.

    Note: If you enable the Multiple Instances Allowed option, the Always Create and Use for Dues Pricing options are grayed out. Enabling the Always Create and Use for Dues Pricing options grays out the Multiple Instances Allowed option.
11. (optional) Enable the Always Create option if you want records to be created automatically for the appropriate customer types and are using the fields for Dues special pricing. Press Tab.
12. (optional) Enter specific customer types in the Only applies to these types field to restrict access to the demographic table, and separate customer types by commas. Leave the field blank to allow access to all customers. Press Tab.
13. Enable the Use for Dues Pricing option if you are using the fields for Billing special pricing. Press Tab. iMIS displays a definition area for the first field for this table.
14. Enter a valid SQL Field Name, and press Tab.
15. (Multiple Instances Allowed only) If you are creating multiple instances of this table, we recommend making your first field contain the information that will distinguish the multiple instances from each other. For example, if you plan to have a table in each customer record for each year's survey data, the first field name should be Year.
16. Select a field format from the Type drop-down list. Press Tab.
17. (Multiple Instances Allowed only) Create multiple instance tables with a first field type of character (Char).

    Note: Lookup is unavailable for numeric user-defined fields. When defining a field that uses a general lookup/validation table, make sure you do not assign a numeric Type to the format (for example, a number).

Note: If you assign a numeric Type format to a field, iMIS automatically formats the numbers entered in the field with commas. If you do not want a user-defined field to be automatically formatted, assign the data type to Char.

18. Enter the field size in the Length field if it is a Character field. Press Tab.
19. (Optional for Int, Number, or Money fields) If a decimal can be entered in the field, enter the number of decimal places to be accepted in the Dec field.
20. In the Prompt field, enter the name of the field that will display on the tab. The default is Field Name.
21. Select the Format option for the data entered in the field on the tab.
22. (optional) In the Validation field, enter the general lookup/validation table that will be used to validate the data at the time of data entry. To enable this field you must build the corresponding general lookup/validation table in the Set up general lookup/validation window (from Customers, select Set up tables > General, and select General lookup/validation).

    A general lookup/validation table is required for a multiple instance table or if you enable the Multi Select option.

    Note: When creating a general lookup/validation table for a multi-select field in a user-defined table, the Description field on the Set up general lookup/validation window must contain a unique value for each Code.

    Note: Lookup is unavailable for numeric user-defined fields. When defining a field that uses a general lookup/validation table, make sure you do not assign a numeric Type to the format (for example, a number).
23. Enable the Multi Select option if you entered a table name in the Validation field and you want to allow the user to make more than one selection from the validation table.
24. Click Save. iMIS prompts you to set up the new table with the server.
25. Click Yes to have iMIS create the server table. This prompt is equivalent to clicking Create/Update Server Table.

26. (optional) Click Auto-Create Window. iMIS automatically creates a user-defined tab with the title based on the table name. iMIS defines the table layout and includes all the fields with the Field Name used as the field label.
27. Click OK if prompted to restart iMIS.
28. Click Close to close the User Defined Tables window.
29. From Tools > Utilities, select User defined tables. Click Build All to generate business objects from user defined tables.
30. Exit iMIS immediately.
31. (iParts using UD tables) Restart IIS so new fields are included as available fields in existing iParts.

To modify a user-defined table

ID_207232 - no need to refresh libraries

> **Note:** Caution! If your user-defined table contains customized objects (triggers, additional indexes, special permissions), they will be lost when the table is rebuilt.

1. Make sure all other users exit the iMIS system.
2. Back up your data.
3. Log on as the database owner: MANAGER.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.
5. Click Define Tables to open the User Defined Tables window.
6. Select the Table Name drop-down list, and select the table you want to modify.
7. Make the necessary changes:

- To add a field to the table, place the cursor anywhere in the field row where you want the new field to follow, and click Insert Line on the User Defined Tables window. A new field

row is inserted, and the new field information can be added here.

- To delete a field on the table, place the cursor anywhere in the field, and click Delete Line on the User Defined Tables window.
- To reorder the fields, select the field, and click Up or Down on the User Defined Tables window.

8. Click Save. iMIS prompts you to update the server table.
9. Click Yes.
10. Click OK if prompted to restart iMIS.
11. Click Auto-Create Window.
12. Click Close to close the User Defined Tables window.
13. From Tools > Utilities, select User defined tables. Click Build All to generate business objects from user defined tables.
14. Exit iMIS immediately.
15. (iParts using UD tables) Restart IIS so any new field added to a user defined table is included as available fields in existing iParts.

To delete a user-defined table

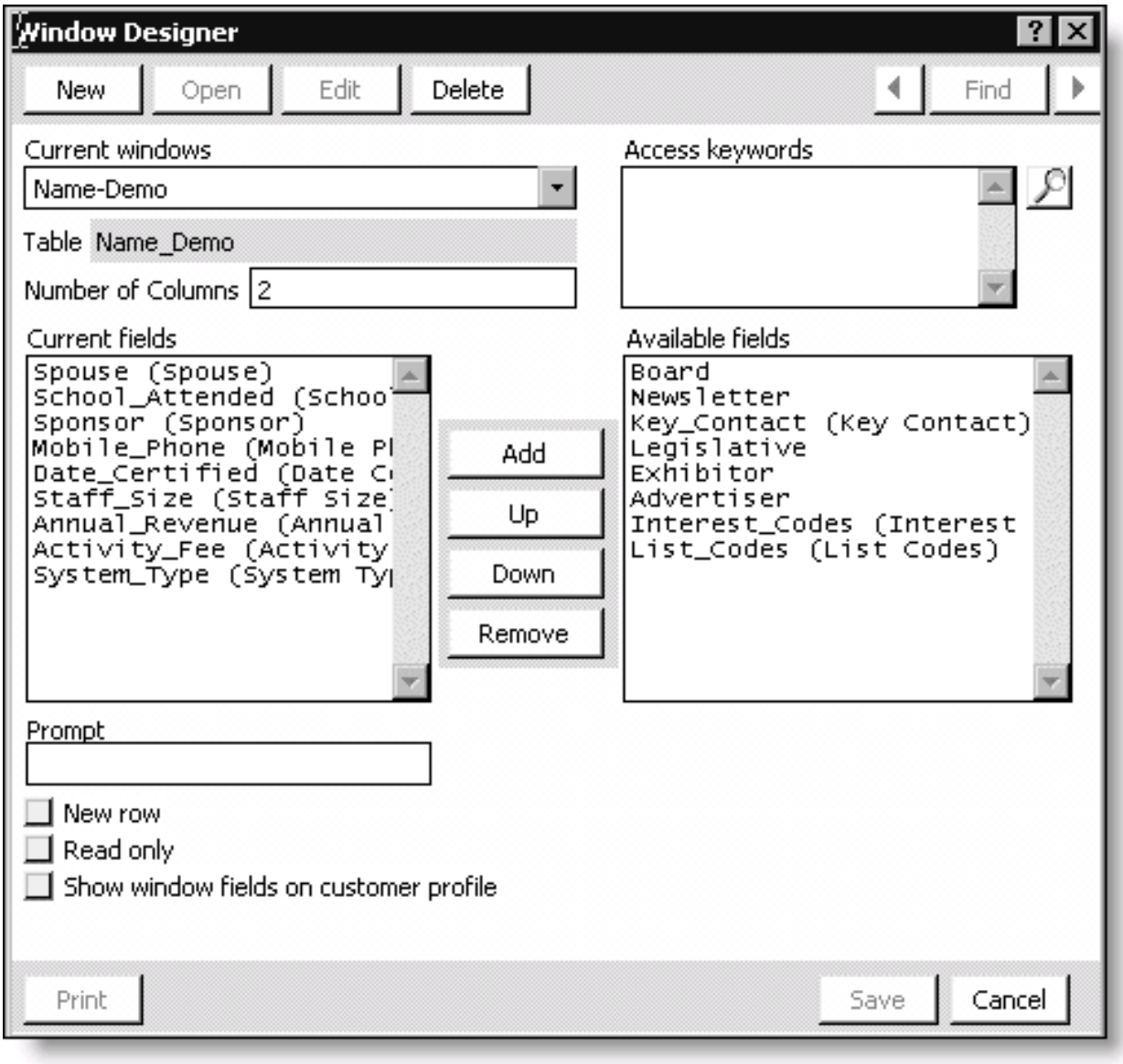
1. Make sure all other users exit the iMIS system.
2. Back up your data.
3. Log into iMIS with the MANAGER logon.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.
5. Click Define Tables to open the User Defined Tables window.
6. Select the table you want to delete from the Table Name drop-down list.
7. Click Delete. iMIS prompts you to confirm the deletion.

8. Click Yes to delete the table.
9. Click Cancel to close the User Defined Tables window.
10. Use SQL Server tools to drop the user-defined table that was deleted.
11. Exit iMIS immediately.

Creating a user-defined tab

The user-defined tab you create will use the data fields from a previously defined table (see To create a user-defined table).

Window Designer window



From Customers, select Set up module> General, click Additional Windows, and click Define Windows

Current windows

Displays a drop-down list of current user-defined tabs.

Access keywords

(optional) Specifies access keywords. Keywords prevent unauthorized users from entering data on the user-defined tab. See Limiting Access and/or Hiding Tabs for more. Select the Find icon to look up defined keywords.

Table

(read only) This field identifies the table used with the tab.

Number of Columns

(Required for single-instance tabs) Specifies the number of columns to display for a single-instance tab.

Current fields

Lists all of the fields that will display on the tab.

Available fields

Lists all of the fields that are available but not displayed on the tab.

Add button

Used to move the selected field from the Available fields list to the Current fields list.

Up/Down buttons

Click these buttons to move the selected field's placement up or down in the Current fields list.

Remove button

Used to move the selected field from the Current fields list to the Available fields list.

Prompt

Specifies the field label that will display on the tab.

New row

Enable if you want the field to display in a new row in the tab.

Read only

Enable to allow users to view but not edit a tab's data.

Show window fields on customer profile

Enable if you want all of the Current fields displayed when you print a customer's profile.

To create a user-defined tab

After you name and define a data table, you can create and customize a user-defined tab based on the data fields.

> **Note:** Note: If you selected Auto-Create Window when you defined the table, a user-defined tab based on the table name was created automatically. If a tab was created automatically, you can modify it (see "To modify a user-defined tab").

1. Make sure all other users exit the iMIS system.
2. Back up your data.
3. Using the iMIS Desktop, connect to iMIS with the MANAGER logon.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.
5. Click Define Windows to open the Window Designer window.
6. In the Window Designer window, name the user-defined tab, enter the table name that contains the data fields, and select the fields you want displayed on the tab. In the following example, the Name-Demo tab is created using fields from the Name_Demo table. Although the Name_Demo table contains 17 data fields, only nine fields are used for this tab. The field labels that display on the tab are the same as the data field names unless prompts are defined for the fields. In this case, the field labels display in parentheses, for example (Mobile Phone).
7. Click New.
8. Enter the tab name in the Current windows field.
9. Press Tab. iMIS prompts you to confirm the creation of the new tab.

10. Click Yes. iMIS prompts you for the table name.
11. Enter the Table Name that contains the fields you want to use for the tab.
12. Click Save. iMIS prompts you for the tab title.
13. Click Save to accept the default title, or type in a different title.
14. Click Save. The Window Designer window displays the tab name and the Available fields from the selected table.
15. Press Tab.
16. (optional) Enter any Access keywords, or select the Find icon to select keywords (see "Limiting access and/or hiding tabs") for the tab.
17. (Required for single-instance tabs) Enter the Number of Columns you want to display for the tab.
18. Select a data field from the Available fields list, and click Add to move the field to the Current fields list. Repeat this step for every data field to be displayed on your tab.

    Note: If there is a subset of fields in your table that need to be confidential among a smaller group of users, remove them from the tab and create a new restricted-access tab containing only these confidential fields.
19. (optional) Select a data field from the Current fields list.
20. Click Up or Down to reorder the field as it appears on the tab.

1. If you want a different Prompt than the one specified in the User Defined Tables window, enter the new prompt.
2. (optional) Enable the New row option to display a field in the first column of a new row.
3. Select the Read only option to create a special display-only field that cannot be edited.

   Note: Use Read only to create versions of the same tab for different user groups: one group can enter data in those fields, while another only can view the data. The Read only option requires the Access Keywords (see "Limiting access and/or hiding tabs") feature.

21. (optional) Enable the Show window fields on customer profile option to show the Current fields on the customer's profile.
22. Click Save. iMIS saves the tab definition and creates the tab format.
23. Click OK if prompted to restart iMIS.
24. Click Close to close the Window Designer window.
25. Exit iMIS immediately for the changes to take effect.

To modify a user-defined tab

1. Make sure all other users exit the iMIS system.
2. Back up your data.
3. Using the iMIS Desktop, connect to iMIS with the MANAGER logon.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.
5. Click Define Windows to open the Window Designer window.
6. Select the Current windows drop-down list, and select the tab you want to modify.
7. Make the necessary changes:

- To add a field to the tab, select the field from the Available fields list, and click Add on the Window Designer window.
- To remove a field from the tab, select the field from the Current fields list, and click Remove on the Window Designer window.
- To reorder the fields, select the field, and click Up or Down on the Window Designer window.

8. Click Save to save the changes.
9. Click OK if prompted to restart iMIS.

10. Click Close to close the Window Designer window.
11. Exit iMIS immediately for your changes to take effect.

To delete a user-defined tab

ID_207232 - no need to refresh libraries

1. Make sure all other users exit the iMIS system.
2. Back up your data.
3. Log onto the iMIS Desktop as MANAGER.
4. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.
5. Click Define Windows to open the Window Designer window.
6. Select the Current windows drop-down list, and select the user-defined tab you want to delete.
7. Click Delete. iMIS prompts you for confirmation of the deletion.
8. Click Yes to delete the tab.
9. Click Cancel to close the Window Designer window.
10. Exit iMIS immediately.

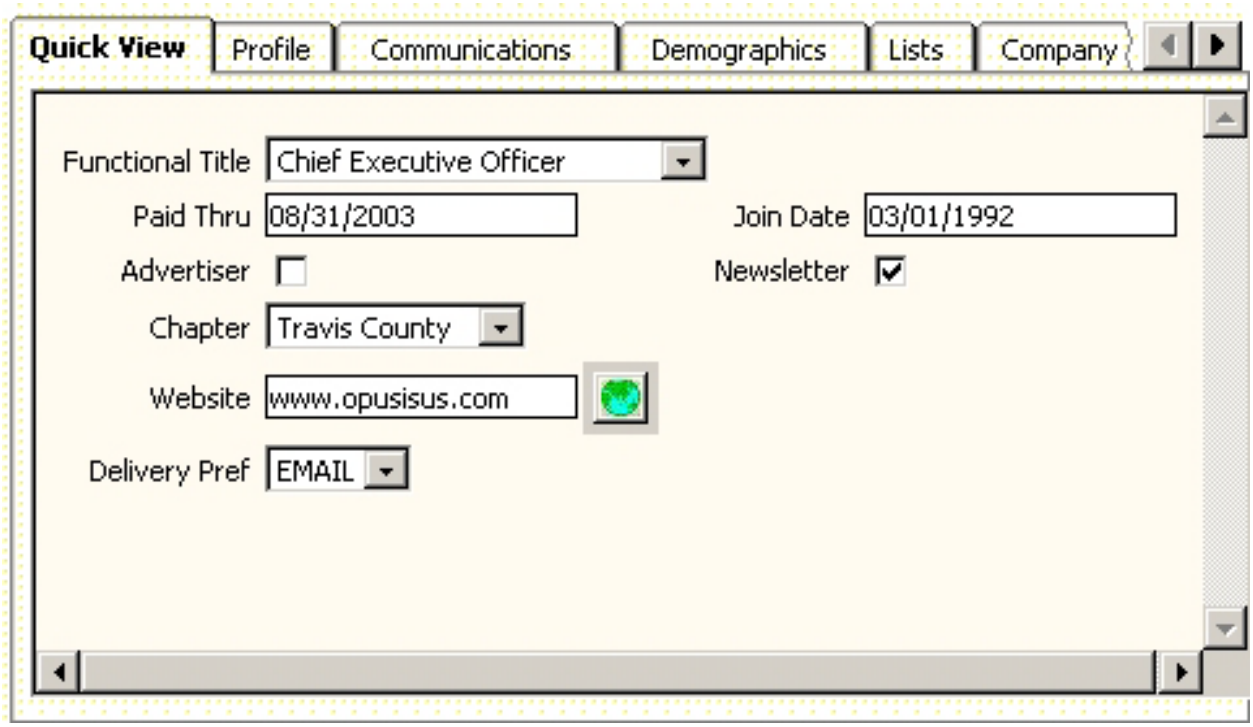
To display custom window fields in customer profiles

1. From Customers, select Set up module > General, and click Additional Windows to open the Customer Setup - Additional Windows window.
2. Click Define Windows to open the Window Designer window.
3. Enable the Show window fields on customer profile option.
4. Click Save.

   Note: You must restart iMIS for your settings to take effect.

Creating custom tabs

A system administrator can create custom tabs for the Details pane of the Customers > Manage customers window. For example, a custom tab can display your most frequently used contact information, so you do not have to look for these field values on separate tabs. In the following example, the Quick View tab contains the contact data your staff might need to view and edit frequently.



Customers > Custom tab example

The custom tabs you create in this way are similar to tabs you create by using iMIS Customizer, except that you can add fields from a wider variety of sources. You can use the following features for defining the tabs:

- Add fields from single-instance user-defined tables, the Name table, the Name_Fin table, or add SQL formula fields based on these tables.
- Specify the field prompt – the text that appears next to the field (optionally).
- Set individual field values to be read-only.
- Assign access keywords to limit which users have access to the tabs.

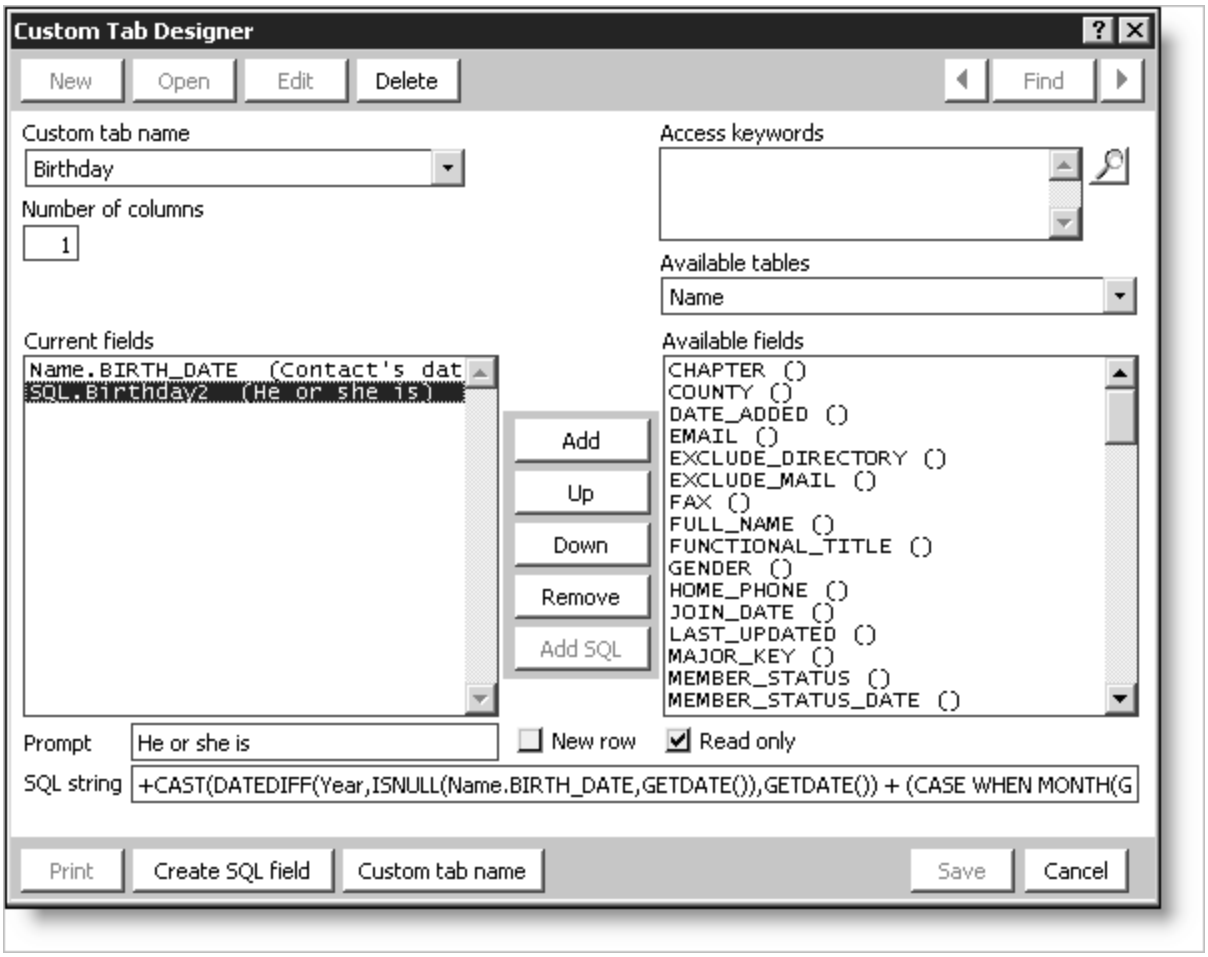
Fields that are always read-only

To protect data integrity, certain fields are read-only on custom tabs:

- Fields based on SQL formulas.
- System-generated fields (for example, Name.FULL_NAME, Name.DATE_ADDED, and Name.LAST_UPDATED).
- The Name_Fin.BILL_TO field.
- Any phone number or e-mail address field used in a synchronization rule: Name.WORK_PHONE, Name.HOME_PHONE, Name.FAX, and Name.EMAIL.
- The Name.COUNTY field, if either one of the options to auto-populate the county name is enabled in system setup:
- Zip Option - Customers > Setup Module> General> Address and Notes> Zip Options> County from Primary Zip
- Accumail Option - Customers> Setup Module> General> Address and Notes> Accumail Options> Update County/Congressional District based on [specified address purpose]
- Any field protected by an access keyword, if an access keyword is specified for any of the Name Record Data groups, such as Name Financials Edit, Name Addresses Edit, or Name Status Edit.

> **Note:** Note: If a user-defined Company Flow Down field is added to a custom tab, the field appears to be editable unless the Read only option is applied to it in the Custom Tab Designer window. If the record the user is editing is linked to a company record, however, the edits to the user-defined flow-down field do not take effect. As soon as the user selects Save, the edited value will be overwritten by the value associated with the company record.

Custom Tab Designer window



Customers > Set up module> General, click Additional Windows, and click Custom Tabs

Custom tab name

The name that displays on the custom tab.

Access keywords

(optional) Specifies access keywords. Keywords prevent unauthorized users from entering data on the user-defined tab. See Limiting access and/or hiding tabs for more. Select the Find icon to look up defined keywords.

Number of Columns

Specifies the number of columns to display for the tab.

Available tables

(read only) Select the table containing the fields you want displayed on the custom tab. You can select from a user-defined table or the Name or Name_Fin table.

Current fields

Lists all of the fields that will display on the tab.

Available fields

Lists all of the fields that are available but not displayed on the tab.

Add button

Used to move the selected field from the Available fields list to the Current fields list.

Up/Down buttons

Click these buttons to move the selected field's placement up or down in the Current fields list.

Remove button

Used to move the selected field from the Current fields list to the Available fields list.

Add SQL button

Used to move the selected SQL formula from the Current fields list to the Available fields list.

Prompt

Specifies the field label that will display on the tab.

New row

Enable if you want the field to display in a new row in the tab.

Read only

Enable to allow users to view but not edit a tab's data.

Create SQL field button

Used to create a SQL formula.

To create custom tabs

> **Note:** Note: In order to create custom tabs, the user must have authorization level 8 for Customers or log on as MANAGER.

1. Make sure all users exit iMIS before creating or modifying a tab.
2. Back up your data before creating or modifying a tab.
3. Make sure the field or tab does not have the same name as any table/field in iMIS or any SQL reserved word.
4. Log on to the iMIS desktop as MANAGER.
5. From Customers, select Set up module > General.
6. In the Set up general options window, select Additional Windows.
7. In the Customer Setup - Additional Windows window, select Custom Tabs.
8. Click <New custom tab> in the Custom tab name drop down list.

   If a custom tab already exists, click the Custom tab name drop down list, choose <New custom tab>, and then enter the name for the tab.
9. In the Custom Tab Designer window, specify the following options:

- Custom tab name field – Enter the text to use as the tab label. You can use spaces and underscores (_), but do not use punctuation (',"), special characters, or SQL reserved words.

  Caution! If you use unsupported characters in the tab name, the next time you start iMIS, the Customers module may be inaccessible.
- Number of columns field - Enter the number of columns to use for displaying the fields.

10. Add fields to the custom tab:

- Fields from Tables - For each field you want to add from an existing table, select the source table from the Available tables list, select the field name in the Available fields list, then click Add.
- Fields from SQL Formulas - For each field you want to create from a SQL formula, select Create SQL field, specify a Prompt value and a valid SQL formula, then click Add SQL.

  You can create SQL fields to display values calculated from values in any of the available tables. For example, the custom tab could display a contact's age (calculated from the birth date) or the tab could include extra information for a contact whose income is in a specified range.

11. (optional) To customize the prompt (text) that appears next to the active field (the field selected in the Current fields list), edit the text in the Prompt field. The Current fields list shows the Prompt setting for each field in parentheses after the field name.
12. (optional) To make the active field appear at the beginning of a row, select the New row check box.
13. (optional) To prevent users from editing the contents of the active field, select the Read only check box.
14. (optional) To assign keyword access to the tab so that only authorized users have viewing or editing rights, use the Access keywords field. Set up access keywords just as you would for any user-defined window (as described in iMIS Customer Management).
15. Optional: To reorder or remove fields, use the Up, Down, and Remove buttons.
16. When you finish specifying tab settings, select Save, then Close. (Close the Customer Setup Additional Windows window also.)
17. To set the new tab to appear at the next iMIS startup, right-click in the top of the History or Detail pane of the Manage customers window and select Edit Tab Preferences. In the Customer Portfolio Tab Preferences window, add the new tab to the Visible Detail tabs list. You can use the Top, Up, Down, and Bottom buttons to order the tabs. Select Save, then close the window.

After you create the table or field, a message notifies you to restart iMIS for your changes to take effect.

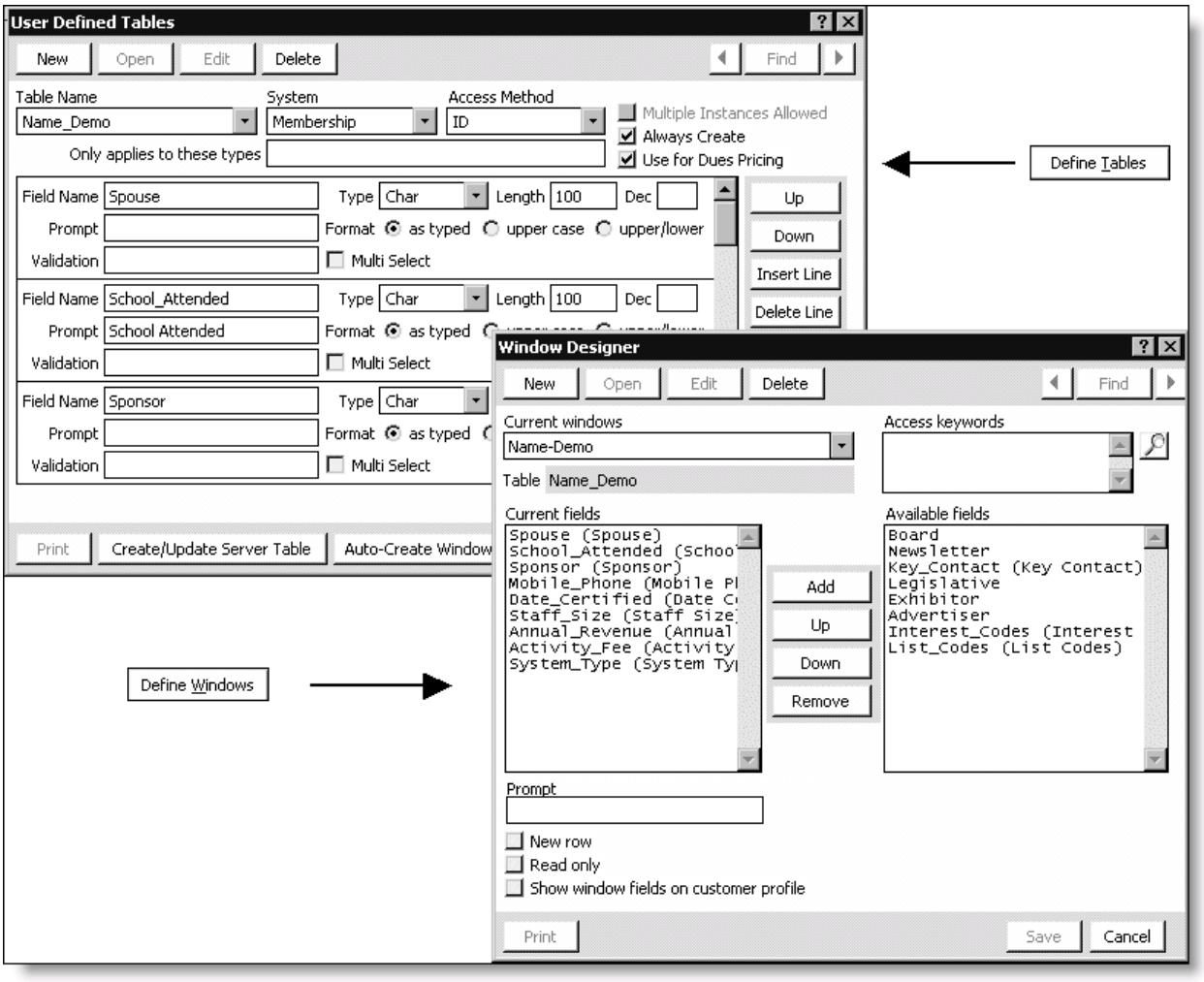
18. Restart iMIS and check for the custom tab you created.

    The next time a user starts iMIS, the newly created or edited custom tab appears in the Details pane of the Manage customers window, provided the following conditions are met:

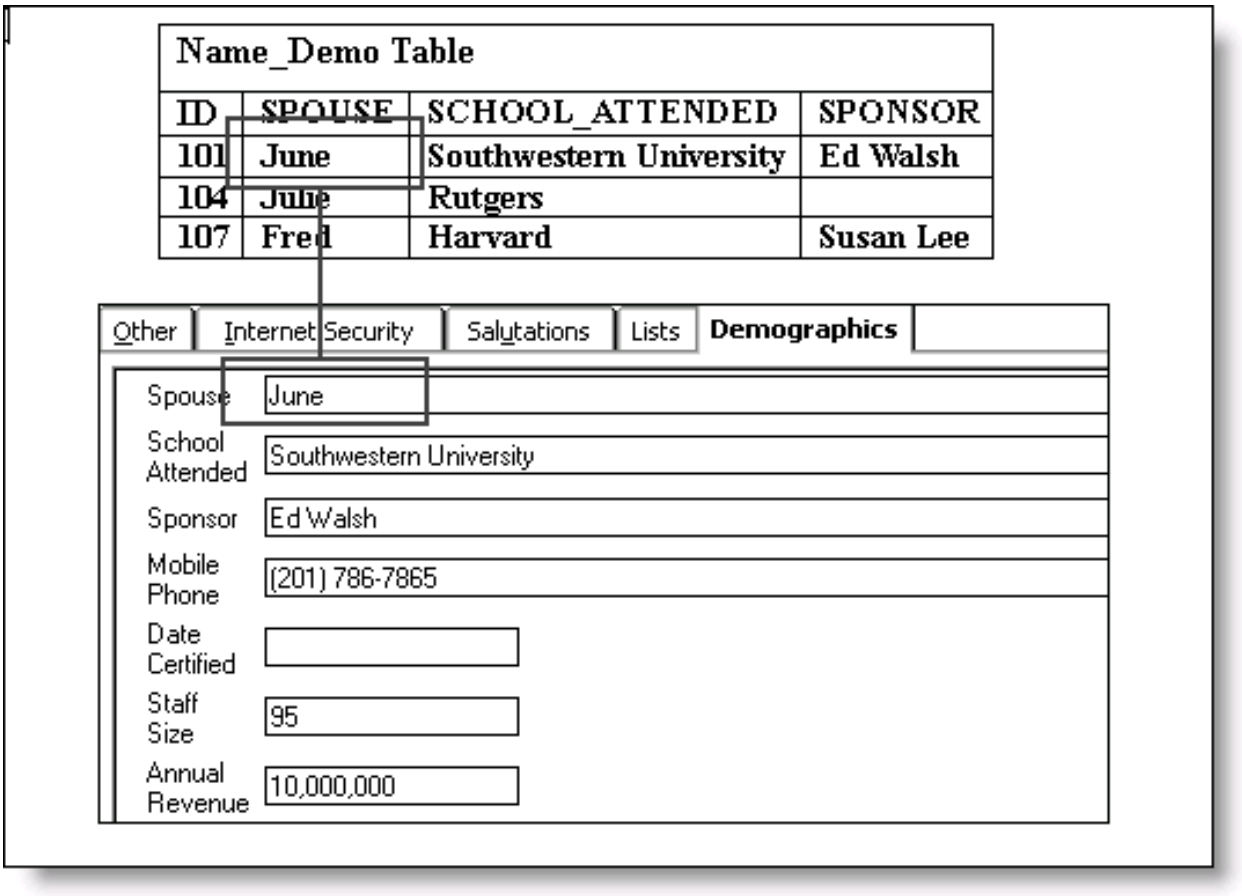
- The tab is included in the Visible Detail tabs list in the Customer Portfolio Tab Preferences window (as described in the previous step).
- The system administrator has added the custom tab to the default Tab Preferences profile, and the user does not have a customized personal Tab Preferences profile.
- If access keywords are assigned to hide the tab from unauthorized users, the system administrator has to assign the needed keywords to the user.

Reviewing the Customizer interface

The following diagram shows the iMIS Customizer windows that you access when you select Define Tables and Define Windows.



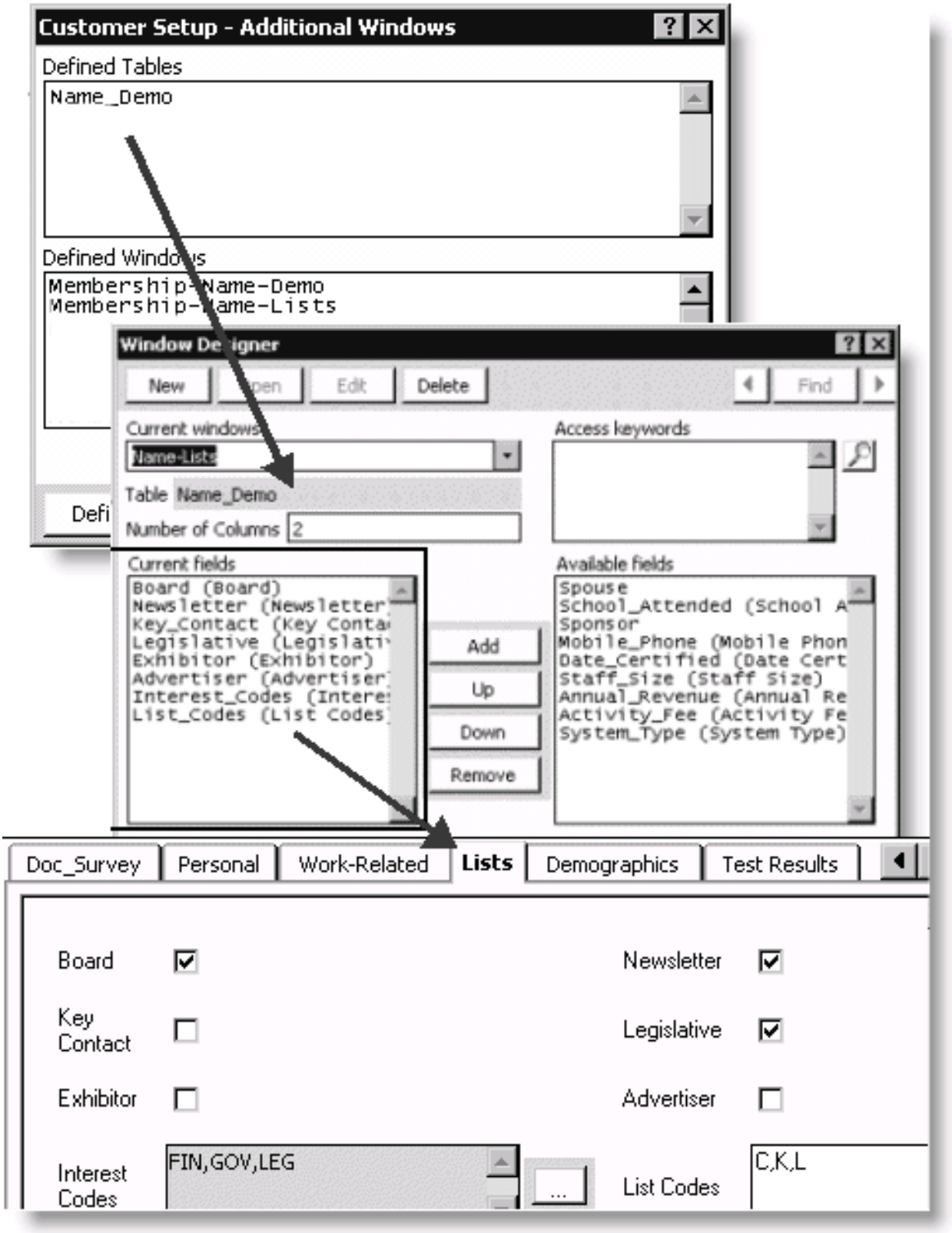
In the User Defined Tables window, we selected the Name_Demo table and defined the fields we wanted to use. When we created the user-defined Demographics tab, we chose the Name_Demo table, and selected only nine fields from the table to display in our Demographics tab.



When we enter data in the Demographics tab, the Name_Demo table stores the data, and the Demographics tab displays the data.

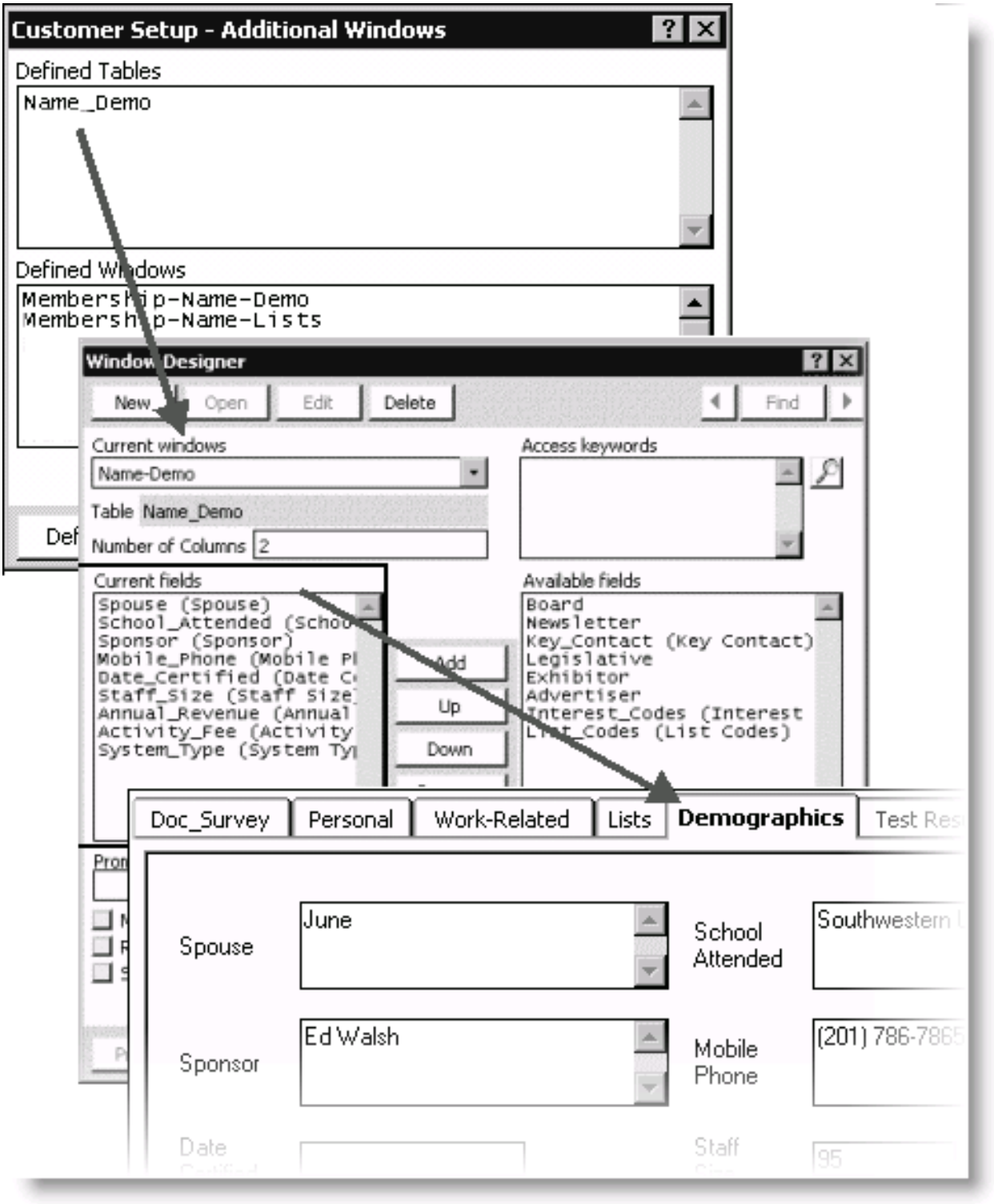
Sample user-defined tabs

The following example illustrates how the data fields in the Name_Demo table were used on the Name-Lists window to create the user-defined Lists tab.



Sample Lists window tab

The following example illustrates how the data fields in the Name_Demo table were used on the Name-Demo window to create the user-defined Demographics tab.



Sample Demographics window tab

Entering user-defined data

Before you begin, make sure you followed the instructions in Creating a User-Defined Table and in Creating a User-Defined Tab.

To enter single-instance, user-defined information

1. From Customers, select Manage customers to open the Manage customers window.
2. Open the customer's record.
3. Select the specific tab, and enter the appropriate data.

   Note: To select values for a field defined as a Multi Select field (for example, the Interest Codes field in the sample Lists user-defined tab), click the Select Values button located to the right of the field to open the Select Values – Web Page Dialog window.
4. Click Save to save the data.

To enter multi-instance, user-defined information

If you use the first field on a multi-instance tab as a key field, the first field must have a Type equal to Char and a general lookup/validation table. This field acts as the key field that allows you to stack data. For example, you may have a questionnaire that is distributed to customers, and you want to track responses for each occurrence. The questionnaire would be entered one time for each ID and could be tracked by the distinct name (key field).

> **Note:** Note: When creating a general lookup/validation table for a multi-select field in a user-defined table, the Description field on the Set up general lookup/validation window must contain a unique value for each Code.

1. From Customers, select Manage customers to open the Manage customers window.
2. Open the customer's record.
3. Select the specific tab in which you want to enter data.

4. Place your cursor in the first field of the bottom (empty) row. A drop-down list will display.

   Note: To select values for a field defined as a multi-select field, click the drop-down arrow on the field to open the Select Values window.

5. Select a value. Repeat this step for each additional field in the row.
6. Click Save.

   To edit a multi-instance, user-defined record

1. From Customers, select Manage customers to open the Manage customers window.
2. Open the customer's record.
3. Select the specific tab that you want to edit.
4. Place your cursor in the field that you want to edit. A drop-down list will display.
5. Expand the drop-down list, and select a value. Repeat this step for each additional field you want to modify.
6. Click Save.

   To view a multi-instance, user-defined record

1. From Customers, select Manage customers to open the Manage customers window.
2. Open the customer's record.
3. Select the tab containing the record you want to view.

   To delete a multi-instance, user-defined record

1. From Customers, select Manage customers to open the Manage customers window.
2. Open the customer's record.
3. Select the tab containing the record you want to delete and use one of the following methods:

- Select the entire row in a tab and press the Delete key on your keyboard. If you select this method, the entire row of data is deleted from the tab from which you are performing the

delete, as well as any other customer tab that contain those fields.

- Select the data in a field and press the Delete key on your keyboard. If you select this method, only the data from the field you select is deleted from the tab from which you are performing the delete, as well as any other tab using the field.

4. Place your cursor in the field containing the data to be deleted. A drop-down list will display.
5. Expand the drop-down list, and select an empty (blank) value from the bottom of the list. Repeat this step for each field in the record that you want to delete.
6. Click Save.

   Note: When deleting data from multi-instance tab, a data row is not permanently removed from the database until all the fields for the multi-instance table are deleted, either by selecting and deleting an entire row or blanking data from a field.

Viewing data on multiple-instance, user-defined tabs in non-grid format

You can view or enter/edit data in a multi-instance, user-defined tab in a non-grid format by opening a window for a specific row in the data grid. The row-specific data window displays if you double-click on an empty data grid row.

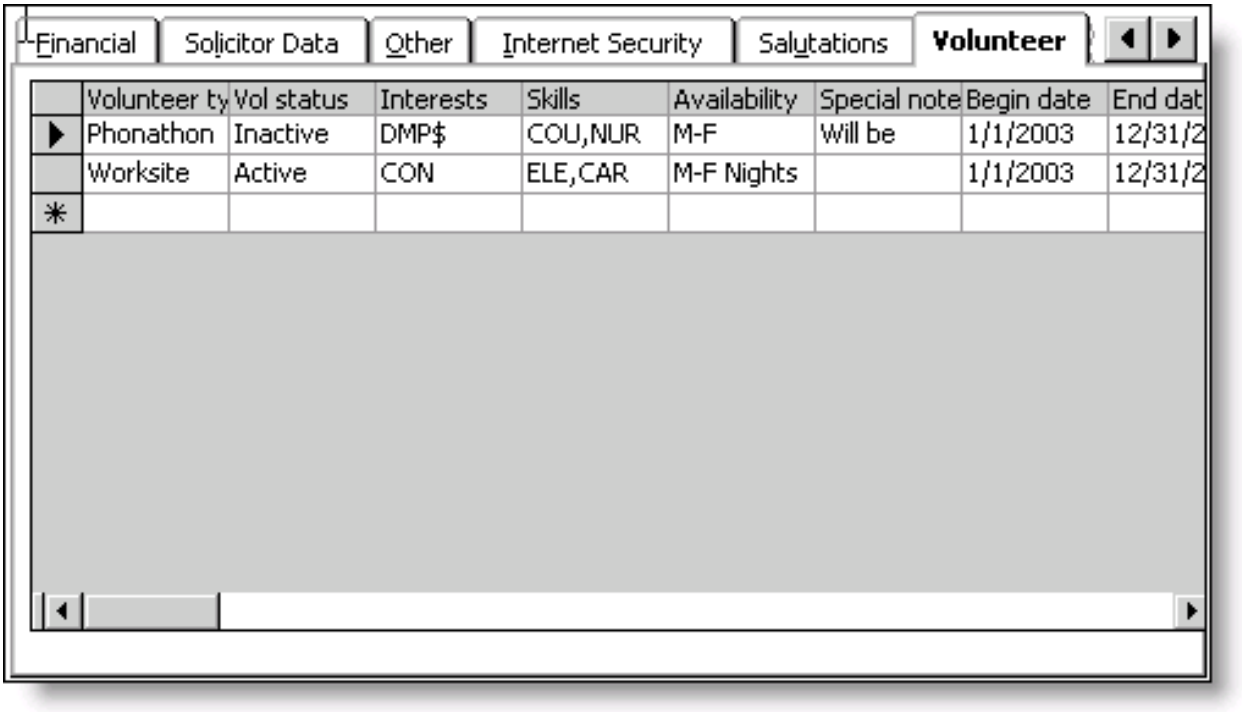
If you have permission to edit the values in the data grid, you can edit values in the row-specific data window. Any values changed in this window are automatically updated in the corresponding data grid rows when you click OK on this window. If you click Cancel, any values changed in the window will not be transferred to the corresponding grid row.

If you have permission to enter records in the data grid, you can enter new records directly in the row-specific data window. Records entered in the row-specific data window will be added to the data grid when you click OK.

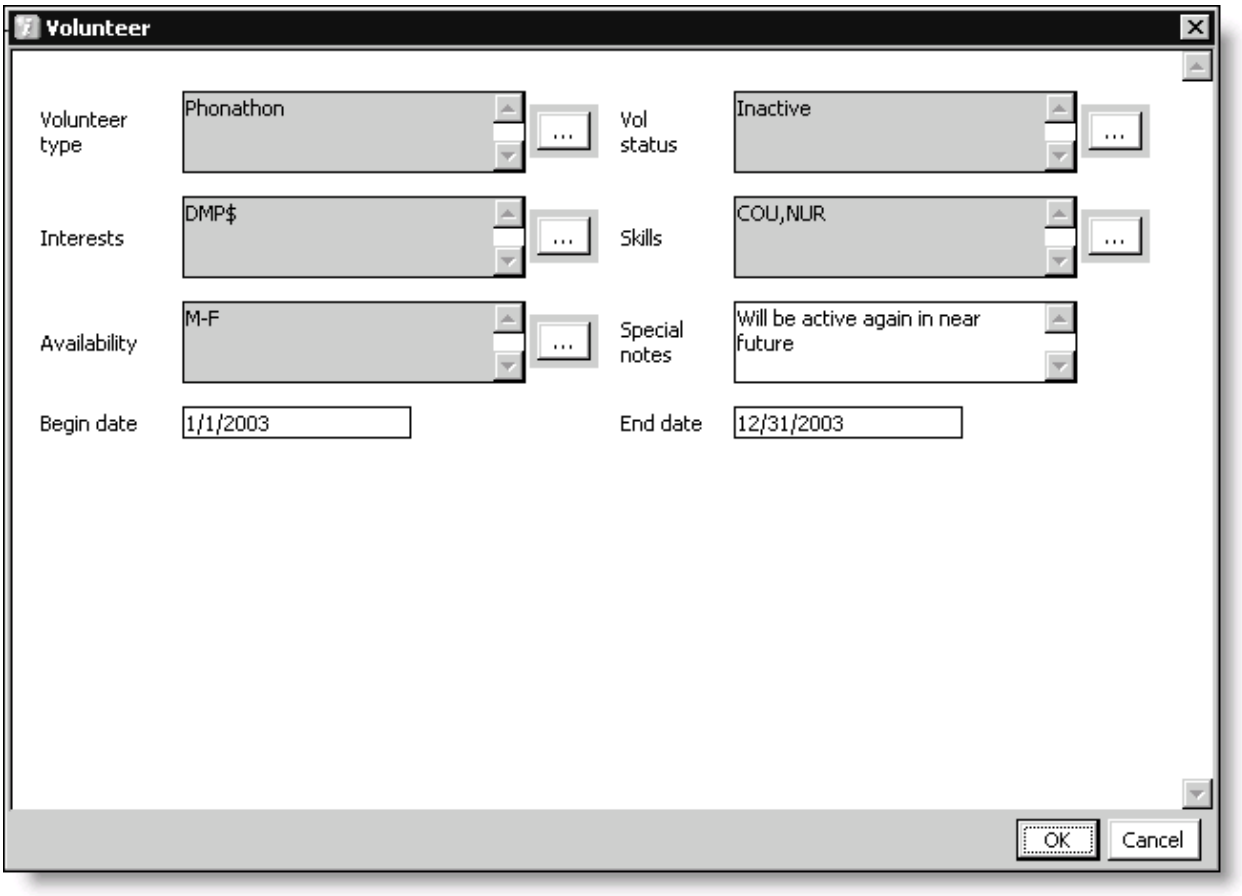
Changes or additions made in the row-specific data window are not saved to the database until you click Save on the Manage Customers window.

If the data grid is read-only, a record can be viewed in a row-specific data window, but the information in the window cannot be edited and you cannot enter new records in the window.

Validation of values entered in the row-specific data window uses the same logic as the validation of values entered in the data grid. Values entered in the row-specific data window are saved to the database after you click OK on the row-specific data window and then clicking Save on the Manage customers window.



Example of user-defined tab (from Customers, find a customer record, then select the user-defined tab)



Example of the first row from the multi-instance user-defined tab shown in previous example displayed in a window format (in the data grid, double-click on the gray box located to the left of the row you want to view)

To view data on multiple-instance, user-defined tabs in a non-grid data window

1. From Customers, click Find and open a customer record.
2. Select the multiple-instance, user-defined tab.
3. Double-click on the gray box located to the left of the row you want to display in a non-grid data window.
4. Click Cancel to close the non-grid data window.

To edit data on multiple-instance, user-defined tabs in a non-grid data window

1. From Customers, click Find and open a customer record.

2. Select the multiple-instance, user-defined tab.
3. Double-click on the gray box located to the left of the row you want to display in a non-grid data window.
4. Make any changes to fields in the window.
5. Click OK.
6. Click Save on the Manage Customers window.

Viewing read-only fields in user-defined windows

Tooltips make it easier to view read-only data in multi-select and text fields in user-defined tabs.

> **Note:** Note: To display user-defined tabs, you must add the tab to the list of visible tabs on the Customer Portfolio Tab Preferences window (from Customers, select Manage customers, then right-click on a tab and select Edit Tab Preferences or press Ctrl+T).

Converting existing fields

To help you upgrade your previously defined user demographics, use the iMIS templates that model the Name_Demo table. A set of window templates is also included to help you view or modify the data.

To convert pre-3.2x C/S versions

To help you upgrade your previously defined user demographics, iMIS includes templates that model the Name_Demo table that was provided with versions before 3.2x. A set of window templates is also included to help you view or modify the data.

MSSQL Only

If you have a database with existing data, you can load these templates, confirm they are working as expected, and proceed with your customizations. These templates are provided in four *.tab files and define the old 66-column Name_Demo table, as well as a

set of three predefined windows. After you confirm that the templates are working, you can rename the UF_* fields to more meaningful field names and define new windows to edit this data.

To convert iMIS LAN demographics

Most sites will want to take advantage of the enhanced custom demographics in iMIS, which will involve mapping old UF_* fields onto newly built tables of custom fields with logical field names. If this is your situation, build your custom tables first, then map your old UF_* fields from the Name file to your custom tables during conversion.

However, you may have such a complex structure in your iMIS LAN demographic fields that you want to bring all the fields over intact. If so, you can use any of four *.tab files that ship with iMIS to create UD tables in the old format, replicating the iMIS LAN demographics table structure and windows:

ud_field.tab	UD_Field
ud_table.tab	UD_Table
ud_wfld.tab	UD_WindowFields
ud_whead	UD_WindowHeader

Limiting access and/or hiding tabs

iMIS allows you to limit user access to confidential information on a user-defined or custom tab. You can restrict access to information and limit data entry and editing to only authorized users by setting access authorization levels (see "Access security levels") in iMIS.

To implement the iMIS security measures, you must perform the following steps:

1. Create the ACCESS_KEYWORDS lookup table.
2. Assign access keywords to user-defined or custom tab.
3. Assign access keywords to users.

To create access keywords

The first step in implementing security measures is to create the ACCESS_KEYWORDS lookup table for the user-defined or custom tab. The access keywords for your tab should include the reserved keyword HIDDEN and a code for each tab.

> **Note:** Note: HIDDEN is a reserved keyword that, when used with an access keyword for a tab, hides the tab to all users who have not been assigned the access keyword.

1. From Customers, select Set up tables > General lookup/validation tables to open the Set up general lookup/validation window.

   Note: Unlike other general lookup/validation tables, users must have an authorization level of 8 or higher to edit ACCESS_KEYWORDS.

2. Select (New Table) from the list of table types. The New Table Type window opens.
3. Enter ACCESS_KEYWORDS in the data entry field, and click Save to return to the Set up general lookup/validation window.
4. Click New.
5. Enter the Code and Description for the access keyword(s). The security for the customized windows is managed by the name of the tab; therefore, the Code entered should reflect the name of the user-defined or custom tab.
6. Click Save. Repeat the process for each additional access keyword.
7. Restart iMIS.

To assign access keywords to user-defined or custom tabs

User-defined or custom tabs can store detailed information about your customers such as annual salary, major gifts, and political affiliations. However, you might not want all system users to view this information or to enter or edit information in the tab.

iMIS allows you to assign access keywords that allow only certain users to view or to enter and edit information on user-defined or custom tabs. You can apply the access keywords on a tab-by-tab basis.

1. Create the tabs' access keywords in the ACCESS_KEYWORDS lookup table.
2. From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup – Additional Windows window.

- For a user-defined tab, click Define Windows to open the Window Designer window.
- For a custom tab, click Custom Tab to open the Custom Tab Designer window.

3. Select the user-defined or custom tab.
4. Enter the Access keywords. (Select the Find icon to open the Select ACCESS_ KEYWORDS value(s) window, and select from the available access keywords.) You can assign access keywords in three ways:

- Assign one or more access keywords to the tab, but do not assign the reserved keyword HIDDEN. In this case, all users will be able to see the tab, but only those with one of the access keywords will be able to enter and edit information on the tab.
- Assign both the reserved keyword HIDDEN and one or more access keywords to the tab. The tab will be hidden from all users except those who have one of the access keywords for the tab.
- Assign neither the reserved keyword HIDDEN nor the access keyword to the tab. In this case, everyone will be able to see the tab as well as enter and edit information on it.

5. (Using the Find icon/Select ACCESS_KEYWORDS value(s) window only) Double-click keywords to move them from the Available to the Selected field on.
6. (Using the Find icon/Select ACCESS_KEYWORDS value(s) window only) Click OK.

   The keywords selected display in the Access keywords field on the window.
7. Click Save to save the information.

   If you have assigned access keywords to a tab, follow the steps in the following section to give the appropriate users permission to view, enter, and edit information on a tab.

   To assign access keywords to users

   MB: The procedure was out-of-date. I embedded the accurate procedure.

Now that you have defined the ACCESS_KEYWORDS values and assigned the keywords to the tabs, you are ready to assign access keywords to the individuals who will be using the tabs.

If a multi-instance tab has an access keyword associated with it, only users that have the matching access keyword and a Customers authorization level of three or higher will be permitted to edit the tab; the tab will display in read-only mode for users who do not have the matching access keyword.

You may limit user access to information in the Customers feature of the Desktop view.

> **Note:** Note: You must create access keywords before you assign them to user records.

1. Log on to iMIS as MANAGER.
2. From System Setup, select Security administration > Users.
3. Find a Full or Casual user and open their user record.
4. In the bottom half of the User Access area of the Users window, enter one or more access keywords in the Access Keywords field, or click the Find icon to select keywords.

   Note: If you create access keywords and apply them to specific areas in Customers, but do not specify the keywords in a user record, that user cannot enter or edit information in those areas of Customers.
5. Click Save.

   Exit and restart iMIS Desktop.

Access security levels

0 – No Access	Menu item is grayed (under File Menu)	Module does not appear on the menu	Module does not appear	Module does not appear on the menu	Module does not appear on the menu

			on the menu		
1 – Basic Display Only	Module appears on the menu System set up options are enabled	Module appears on the menu. Main display window enabled with other options grayed. Find is the only function available on the display window. (Committee system is also enabled, if included in license)	Module appears on the menu	Module appears on the menu; all menu items except main display window are grayed. Find is the only function enabled on display window. Batch is available, if set up. Print Transaction journal is enabled.	Module appears on the menu
2 – Reports	No effect	Report option on module menu becomes available.	Report option on module menu becomes available.	Report option on module menu becomes available.	Report option on module menu becomes available.
3 – Limited Entry/Edit	No effect	New and Edit Functions are enabled.	Payment and Credit menu is enabled. New and	New and Edit functions are enabled. Orders is enabled if order level is 3, otherwise, order	No effect.

			Edit functions are enabled.	permissions follow AR level. Orders cannot be edited.	
4 – Full Entry/Edit	No effect	Delete Function is enabled. **	Billing is enabled. Delete function is enabled. **	Month End Procedures option becomes available. Delete function is enabled. **	Registration window becomes available. New, Edit and Delete functions are enabled.
Specific Types	No effect	Editing capabilities restricted to specified Member Types	No effect	No effect	No effect
5 – Table Maintenance	User/Password window enabled. Organization window enabled.	Table Maintenance option on module menu becomes available.	System Setup option on module menu becomes available.	Table Maintenance Option on Events menu becomes available.	Events window becomes available. Table Maintenance Option on Events menu becomes available.
6 – Report Changes	No effect	No effect	No effect	No effect	System Setup option on module

					menu becomes available.
8 – System Setup	iMIS Utilities enabled. Run enabled. Open Application enabled.	Utilities> System Setup option on module menu becomes available.	No effect	System Setup option on module menu becomes available	No effect

**The Delete function is enabled only if the Allow Delete from Customer Portfolio option is enabled on the Customer Setup - Basic Options window (from Customers, select Set up module> General, and click Basic Options).

SQL reserved words

Do not use iMIS table or field names or SQL reserved words for user-defined tables and field names. Examples of reserved words for SQL Server include CLOSE, MANUAL, and VISIBLE.

Using iMIS or SQL reserved names may overwrite crucial existing tables and fields. Refer to the Microsoft SQL Server documentation for the SQL reserved keywords.

Customizer tips

The following are tips or useful information that help you create user-defined or custom tabs.

Troubleshooting user-defined or custom tabs

To make sure the user-defined or custom tabs are created properly, these pre-requisites must be in place.

1. Make sure all users exit iMIS before creating or modifying a tab.

2. You must have an authorization level of Customers level 8 to create a tab, (see "To create custom tabs") so either log on as a user with that authorization level or log on as MANAGER before creating a tab.
3. Back up your data before creating or modifying a tab.
4. Make sure the field or tab does not have the same name as any table/field in iMIS or any SQL reserved word (see "SQL reserved words").

   Unique table and field names

   When creating a user-defined table, you must use unique tables and fields. You cannot use an iMIS table name, an iMIS field name, or a SQL reserved word.

   > **Note:** Tip: To ensure unique naming, prefix acronyms to tables and fields you create. For example, organization ABC could define tables in the form ABC<TableName>; so, a table for the Discovery Conference could be ABC_DiscoveryConference, and its Name field could be DC_NAME.

   Limits for fields and window tabs

   There are no technical limitations on the number of fields for each user-defined tab; however, if a tab contains more than 50 fields, the tab becomes cluttered. This design may prevent users from viewing some fields.

   To see a list of the user-defined tabs displays in the Customer Setup – Additional Windows window, from Customers, select Set up module> General, and click Additional Windows. This menu can display up to 20 tabs. If your tabs exceed this amount, consider consolidating the data so fewer tabs are needed.

   The maximum length for a character field in a tab is 255 characters. If you define a field with over 255 characters, the data type becomes a Text data type.

   User-defined fields in iMIS special pricing

   If you have a user-defined field that contains a year and would like to use it in special pricing, you can use the datepart function. In the following example, the field is Name_

Custom.MEMBER_YEAR. It is a character field with a length of four. Add the field to the Name_All view, and you can use this calculation in special pricing:

```
If Name_All.MEMBER_YEAR >= datepart (year,Today(*))
Then 100
Else 200
Endif
```

The datepart function in this example takes the year from the current date, Today(*). The IF statement compares the current year to Name_All.MEMBER_YEAR, resulting in customers being charged 100 if the MEMBER_YEAR is greater than or equal to the current year, or 200 if the MEMBER_YEAR is less than the current year.

Troubleshooting Customizer

ID_207232 - no need to refresh libraries

The following are solutions to problems you may experience while creating user-defined or custom tabs:

- Problem: Tab not retaining data

  This is caused when the tabs get out-of-sync with the database, usually because more than one person was logged on while the tab was being created or edited.

  Solution: Make sure all users exit iMIS before creating or editing a tab. Edit the field or tab, change it back to activate the Save button, and then save the field or tab.

- Problem: Data not displaying correctly

  Solutions: If the data in a tab is not displaying correctly, verify the following solutions.

1. Delete and recreate the tab if the tab definition has not changed since the data was added, but fields were moved around in the tab.
2. No one was logged into iMIS when the table and tab were defined. Make a minor change to the table and tab (move fields up and down), and save.
3. Close iMIS after updating tables or tabs.

4. Run a query to determine if the data has been saved in the user-defined table but is not displaying in the tab.

- Problem: Validation table (the lookup feature) does not display for a custom field

  Solution: Make sure the validation table exists. Refresh the iMIS libraries.

Customer System Maintenance

Permanently deleting customer records

You can permanently delete iMIS customer records using two different methods:

- Permanently delete individual records (select the record in Manage Customers and click Delete) or
- Mark the record for deletion to be deleted at a later time by selecting the record in Manage Customers and changing the status to Marked for deletion. This will mark the record in the database with a status of D. You must then run the appropriate script for your database to permanently remove these customer records.

> **Note:** Note: iMIS contact records will continue to display in search, unless the record is “Marked for deletion”. If you do not want the publishing service to include contact records that were previously deleted, but not “Marked for deletion”, you will need to delete the search Contacts folder (ASI\iMIS\indexServiceProtected\Search\Contacts), and then delete the row in the SystemConfig table that is used by contacts publishing (e.g. DELETE FROM [dbo].[SystemConfig] WHERE [ParameterName] LIKE 'ContactsPublishing-<Publishing Server Code>'). The Contacts folder and the SystemConfig row will be recreated automatically.

iMIS does the following when you run a script to permanently delete customer records marked with a status of D:

- A record is added to the Name_Log table. The record will have the following values: Date/Time,CHANGE,DELETE,GUEST,id,last_first,company

- The Activity table is updated. For every customer record that is deleted, all of that customer's activity records will have the ID set to ''.
- All references to deleted customers are removed from user-defined tables.
- All records for deleted customers are removed from the following tables:
- Name
- Name_Address
- Name_Fin
- Name_Note
- Name_Picture
- Name_Indexes
- Name_Security
- Name_Security_Groups
- Prospect
- Subscriptions

  There are certain cases when the customer record will not be deleted:

- The customer has open orders. The script checks for the following field values in the Orders table:

  ID = ID to be deleted and

  STAGE <> "CLOSED" and STAGE <> "CANCELLED" and

  STAGE <> "COMPLETED"

- The customer has an outstanding invoice balance. The script checks for the following field values in the Invoice table:

  BT_ID = ID to be deleted and BALANCE <> 0

- The customer has active subscriptions. The script checks for the following field values in the Subscriptions table:

  STATUS LIKE 'A%'

- The customer has an entry in the Referral module, and this customer owes money. The script checks for the following values in the Referral table:

  PROVIDER_ID = ID to be deleted and

  REFERRAL_FEE > 0 and READY_TO_INVOICE = 1 and ORDER_NUMBER = 0

- Deleting this customer will leave orphaned records. Examples of orphaned records include the following:

- Name record with a Bill_TO ID, where the Bill_To ID no longer exists.

- Name record with a Company_ID, where the Company_ID no longer exists.

- Name_Fin record, where the Bill_To ID no longer exists.

- Cert_Register records, where the Bill_To ID no longer exists.

  For example, if ID 110 and 200 both have Cert_Register records with 110 as the Bill To Id, and ID is marked for deletion, and ID 200 isn't, ID 110 won't be deleted since that would leave ID 200 with a non-existent Bill To ID.

  To permanently delete a customer record (SQL database)

  Use the following instructions to permanently delete a customer record that has been marked for deletion (records in the database with a status of D). You can also run the Purge_MSSQL7.zip file available in the Tech Support Download area of the ASI website.

  > **Note:** Note: This procedure will only delete entries from Client Server tables. To remove entries from .NET tables, you need to use the DB Maintenance tool. See "Purging user and contact records".

1. Select Utilities> Reports and Queries to open the System Reports and Queries window.

2. Select the Purge report type.
3. Select the Membership Purge for MS SQL report for you database.
4. Click Run. A message displays asking you to confirm the deletion.
5. Click Yes.

Customer record database schema

The main contact-related tables within the iMIS database are Name, ContactMain, Individual and Institute. All basic contact information defined in customer portfolio is stored in the Name table and duplicated to the other three tables, depending on what kind of record it is (Individual, Institute or Combo*). ContactMain, Individual and Institute are often used in iMIS web features (Process Manger, Marketing Suite, WCM, etc.). For each row in Name, there is usually one row in ContactMain and one row in either Individual OR Institute. For a combo record* however, for each row in Name there are two rows in ContactMain (one for the individual and one for the institute), one row in Individual AND one row in Institute. The only place this difference surfaces is when using the NetContact business object as a source within IQA (see Finding customer records with IQA for details).

Over time, your database may end up with orphaned rows in the ContactMain, Individual and Institute tables. This can happen when a record type changes from an individual to an institute, or when a record has been deleted within iMIS Desktop. These orphaned records do not interfere with the application, as their references back to the original contact are removed and they are updated to have a status of 3 (deleted). But from time to time you may want to purge these orphans. If you wish to do so, refer to the section Purging user and contact records. Note that if an orphaned record is still in use (e.g. Updated By/Created By fields in iMIS web modules), then it cannot be purged.

*What is a combo record?

A combo record is a Company record that also contains a first or last name. This case will only occur if customer portfolio is not set to Suppress Individual Name Fields for Company Records (see Customer Setup - Basic Options window for details.)

Troubleshooting iMIS

Shortcut limitation with multiple instances

If you are using a Windows shortcut to access iMIS and you are opening multiple instances of the Manage customers window, you may encounter an Omnis error. If this happens, consult with your administrator.

This error appears to be related to the length of the target path shown in the shortcut.

Workaround

Try renaming the iMIS directory to a shorter name. Make sure to change the ODBC database path and the shortcut target path with the shorter name.

Error log files

The Customer Portfolio creates a log file (asiMMDDYYYY.log) each day. The log file records errors and other information. Error log files are deleted after five days. Depending on your operating system, the location for the log file varies. For any Windows operating system, you can go to Start > Run on the computer running the Desktop client. Type %TEMP%/asiTemp and then click OK to open an Explorer window with the temp directory opened. As another example, on Windows 2000, the log files are stored in the \Document and Settings\(Your username)\Local Settings\Temp\asiTemp directory.

Customers

Customers is the core area of functionality where back-office customer relationship management occurs.

Common commands and shortcuts (Desktop)

Standard toolbar commands

The toolbar provides a standard set of command buttons for working with records, and it is critically important to using the product. To help you recognize and use these commands consistently, the buttons appear in the same place within windows whenever possible. For example, New is always located at the top left of the toolbar, and Find is always located at the top right.

The standard toolbar above the work area

When a standard button does not apply to a given situation (for example, Delete when no record is open or selected), the button is disabled. You can recognize that a button is disabled by its muted gray text label (instead of black) and by the fact that you cannot tab to or select that button.

Toolbar Commands

New	Create a new record	Previous	Move to the previous record (if any)
Open	Open an existing record	Find	Open Search to find a record
Edit	Open an existing record for editing	Next	Move to the next record (if any)
Delete	Delete an existing record	Print	Open the Select Report window (disabled during data entry)

Keyboard shortcuts

Learning these built-in keyboard shortcuts will make data entry faster and easier. Use the right-click menu to Undo, Cut, Copy, Paste, Delete and Select All in the Name, Address

and Detail sections and in single-instance user-defined tabs. The right-click menu is not supported in the History section.

General Shortcuts

Ctrl+F	Find	Ctrl+C	Copy *
Ctrl+L	Lookup	Ctrl+V	Paste *
Ctrl+E	Edit	Ctrl+X	Cut *
Alt+S	Save	Spacebar	Execute button action
Alt+C	Cancel	Ctrl+T	Edit Customer Portfolio tab preferences
Ctrl+I	Insert new record	Ctrl+Q	Exit iMIS
Ctrl+N	Open a new instance of iMIS		* excluding single-instance UD tabs

Detail Tabs Shortcuts

Alt+P	Go to Profile tab	Alt+L	Go to Solicitor Data tab
Alt+D	Go to Donor Data tab	Alt+O	Go to Other tab
Alt+T	Go to Status tab	Alt+U	Go to Salutations tab
Alt+N	Go to Notes tab	Ctrl+Z	Undo (UD tabs only)
Alt+F	Go to Financial tab		

Data Grid (Table) Shortcuts

Ctrl+F9	Load next record from Results tab	Home	Move to first column of current row
Ctrl+F8	Load previous record from Results tab	End	Move to last column of current row
Ctrl+R	Load selected record (Results, Record History, Roster, Relationships, or Role tab)	Ctrl+Home	Move to first record
Ctrl+W	Load selected record in a new instance of iMIS	Ctrl+End	Move to last record
PageUp	Move UP one full screen in grid	Ctrl+Z	Zoom grid field (with length > 255 char-

			acters)
PageDown	Move DOWN one full screen in grid	Ctrl+Z	Undo (inside a zoomed field)

Customers Overview

Features found in the Customers area offer core iMIS functionality, designed for organizations. When you select Customers, you see a detailed view of your customer or member database. With this feature you can enter, edit, track, and maintain your organization's complex and dedicated customer information.

iMIS Customers integrates completely with other areas of iMIS. Much of the information these other areas use is sourced from the customer database, and the customer database is automatically updated whenever edits to customer data are performed within other areas. This constant flow of data makes iMIS an adaptable and expandable tool as the needs of your organization change.

iMIS customer management capabilities

The iMIS Customers feature enables you to perform the following tasks:

- Track and manage customers information, including eliminating duplicate records.
- Manage committees and chapter rosters.
- Store pictures (including logos).
- Plan and track activities (past, present, and future).
- Produce detailed standard reports (rosters, statistics, activity detail, and exports).
- Produce various types of correspondence helpers such as labels, letters, email, and user profiles.

Power of iMIS

Think of iMIS as a virtual filing cabinet filled with file folders that hold complete records for every customer you want to track. Regardless of the number of times these files are accessed, the records are not mislabeled or lost. Each customer file can grow as large as

needed. For example, you have the ability to continuously add information, such as what customers have done, where customers work, who customers know, what customers have contributed, and how much customers owe. You can store all of this information safely for as long as you need to keep it.

Designed for associations

iMIS provides the following powerful features:

- You can search for and retrieve customer information using many methods beyond simply scanning alphabetical lists. For example, you can search by ID, by company affiliation, by status, and by join date.
- You can display and print any type of customer information you are maintaining. This information can be analyzed in meaningful, organized, and easy-to-use reporting formats.
- You can view summaries of customer counts and statistics that iMIS maintains and updates automatically.
- You can quickly generate professional reports, personalized letters, mass e-mail, and labels for a selected group or for all of the customers in your file.
- You can create your own custom windows, tables, and fields that fit the specific requirements of your organization.

The iMIS design lets you work with your customer data in compact displays and feature-rich menus. Since no two associations are alike, iMIS has a flexible design that lets you customize the system to meet your specific requirements. For this reason, you will work with your System Administrator to set up iMIS to efficiently handle your needs. Pre-planning pays off in long-term usefulness and ease. In addition to customizing your system, you can also personalize the appearance of iMIS.

Tracking flexibility

iMIS provides a central database where you can track the companies and individuals that make up your association. Customers can include prospects, advertisers, exhibitors,

subscribers, fundraising donors, and legislators. Plan on your database keeping track of the following types of customers:

- Everyone who receives your promotional or regular mail, newsletters, and magazines
- Everyone whose receivables, cash receipts, or other history you want to track
- Everyone for whom you maintain telemarketing call logs and follow-up information

iMIS uses a single set of entry/edit windows to keep track of all customers in a single database. This unified database approach can:

- Simplify the data entry procedure by keeping all list entry restricted to a single set of windows or screens.
- Prevent errors by checking changes to data against lookup/validation tables and questioning or rejecting erroneous information.
- Eliminate duplication of effort by not requiring multiple data entry for all companies or individuals that simultaneously belong to different lists.
- Simplify the mailing and communication procedures, guaranteeing that individuals do not receive duplicate mailings when they are on several lists.

iMIS has several facilities to help you categorize and segregate the customer records into the groups you need.

Association list management

iMIS provides many tools that allow you to organize your customer database. Some common ways to group customers include:

- Customer type
- Customer status
- Category
- Committee
- Chapter
- Company/institute

- Activity
- Inclusion/exclusion category
- User-defined index
- Ad hoc search

By planning for and making appropriate use of iMIS organizational tools, you can easily track and report on various types of customer lists.

Type

You must assign a customer type code to each record you enter in iMIS. Some common customer types may include:

- Members
- Companies
- Individuals
- Customers according to billing level
- Categories for prospects, exhibitors, or advertisers

The primary strategy behind establishing customer types should be to distinguish different pricing levels. This usually pertains to billing, but can also include event registrations and order pricing. Customer types must be mutually exclusive; in other words, each customer may have only one customer type.

Customer types are extremely important. You should analyze the organization of your particular association before setting up customer types. Your System Administrator can assist you with this task.

Status

You can further divide types of customers by a status code. iMIS reserves the following status codes:

- A - for Active
- S - for Suspended
- I - for Inactive
- D - to mark for Deletion

All active customers begin with a status of A. A customer's status could change to S if, for example, they did not pay their dues by the end of the grace period. If, after a period they still did not pay their dues, you might change their status to I. Use a status of D only if you want the record to be marked for permanent deletion from the customer file.

Category

You can use Category as an additional way to categorize customers for billing purposes:

- Billing Category 1
- Billing Category 2
- Billing Category 3

Billing categories are assigned to customers in the Customers > Billing area.

Committees

You can organize customers into various committees through the Committee subsystem. Through this subsystem, you can track the following:

- Customers on particular committees
- Positions held
- Term of appointment
- Service history

You can use this information to customize print output for various committees. For example, you can print labels for mailings to a specific committee.

Chapters

iMIS lets you group your customers or members into separate and distinct chapters, or groups. Even if your organization does not have official chapters, you may find the chapter feature useful for organizing customers by state or pertinent regional areas.

Company/Institutes

You can keep lists of all individuals affiliated with a specific company or other entity by specifying a Company ID for those customers. Organizing customers by Company ID lets you easily view and work with a company roster or search for an individual by Company ID.

Another benefit of organizing customers by Company ID is that you have the ability to link the company address to the individual customer. When you enter a Company ID (Parent Record) for an individual record (Child Record) that currently has blank name, address, and telephone number fields, the parent company's Company Name, Address, and Telephone Number fields “flow down” to the child record. iMIS automatically populates the data from the company record. See Company flow down (see "Company flow down in iMIS") for more.

iMIS also lets you maintain multi-level company structures. For example, some individual records can point to intermediate company subsidiaries or branches that in turn point to higher level company records.

Activity

Activity types can include event attendance (system-assigned and generated), billing, fundraising, orders, awards received, volunteer service, and call logging. You can use the various activity types to organize customers into groups such as those who attended the last convention or who received a certain award. With the call-logging capability, you can list all task items that have a follow-up date in a certain date range. Task items are automatic reminders you can set up for activity types such as CALL.

Inclusion/Exclusion Categories

Another way to mark a company or individual's inclusion or exclusion from various groups is through user-defined check boxes. Use this feature to indicate yes/no or on/off

responses to single-choice lists or other designations. Some common inclusion categories could be:

- Send newsletter
- Participates in insurance program
- Key customer for legislative action
- Exclude from categories (exclude from certain mailing types, exclude from sold lists)

User-defined Indexes

During system setup, iMIS lets you specify up to four regular data fields as access keys (for screen lookup only). These fields will display in the Find window. iMIS will create and maintain a special index file for each designated index field. This index sorts the records according to the data in the specified field. For example, if you designate the State field as an index, iMIS would maintain an index list of all records, sorted in state order. This index lets you scan a customer list by state without searching the entire file. See Defining Lookup Indexes for the Find Window.

Note: Although user-defined indexes are useful, keep in mind that there is a performance tradeoff. Indexes can increase efficiency in accessing and searching; however, they do add overhead to data entry and maintenance functions. For this reason, only assign indexes to fields that will be routinely used as access keys.

Ad Hoc Searches

Beyond these list-maintenance features, iMIS also provides ad hoc searching where you can create complex formulas for searching any data fields stored for your customers. When executed, these ad hoc searches create temporary sub-lists that you can work with just as you do with permanent lists.

iMIS Customers feature terms

Before using iMIS Customers, you need to know these terms:

Database

A database is a collection of related information that is organized into meaningful units (for example, files, records, fields, graphics, and photos) for dedicated storage and access.

Table

A table is the highest organizational unit in the database. The iMIS files used most often in the Customer system are the Name tables. The convention for entering field definitions is to put the table name in title-case followed by a period and the field name in capital letters:

Table_Name.FIELD_NAME

Record

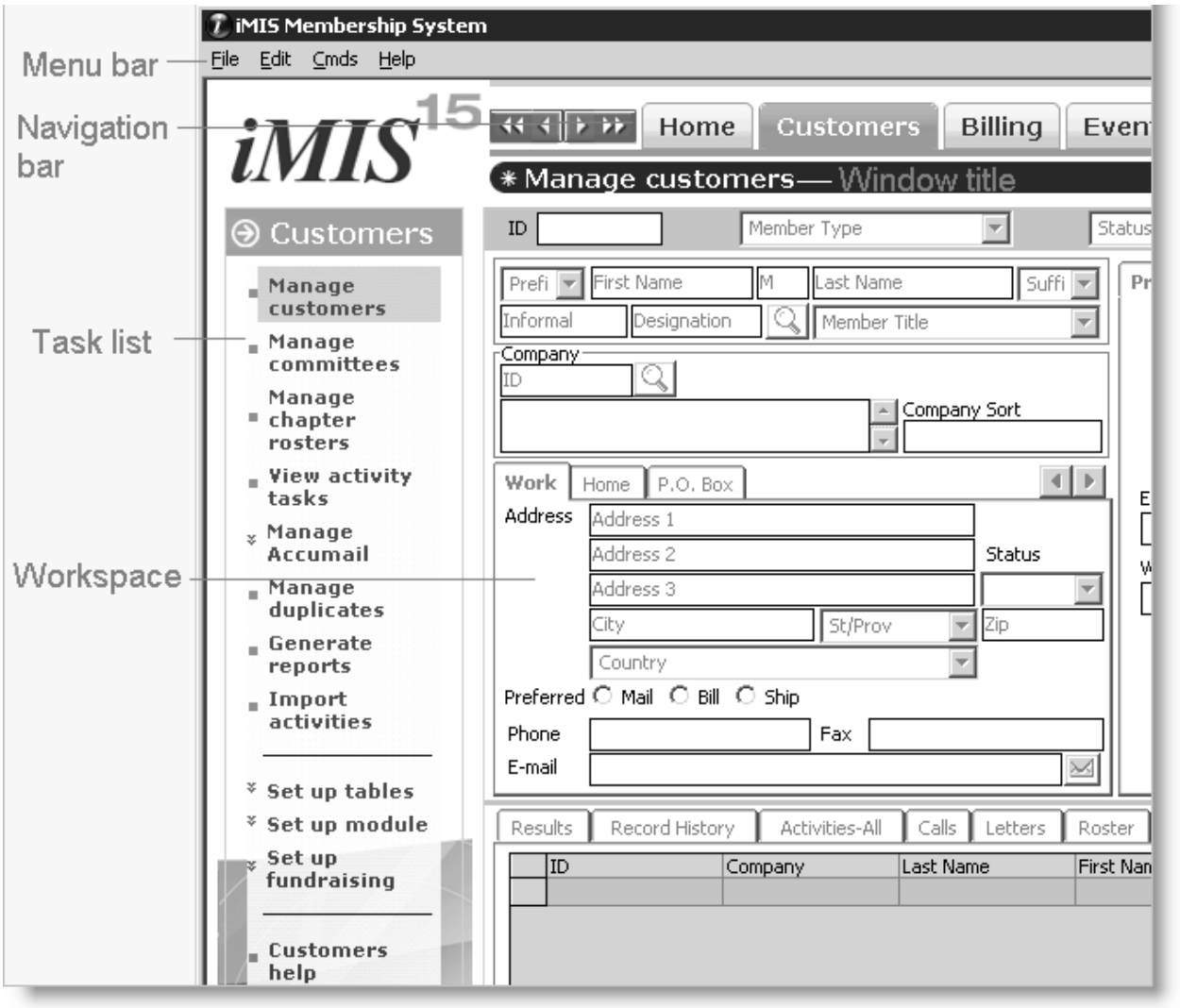
A record is an individual unit in a file containing a collection of fields. These fields are consistent in number and type from one record to the next. For example, a separate record is stored in the customer file for each individual or company in the system. (A record is also called a row).

Field

A field is an individual data element in a record (also called a row). A field may display in a data maintenance window in the form of a labeled text box or check box.

Reviewing the iMIS interface

The iMIS interface provides an effective way for you to complete tasks.



An example of the iMIS interface

Menu bar

The menu bar contains the commands for iMIS that are related to database functions and are rarely used.

Navigation bar

The navigation bar is located between the menu bar and the window title bar and consists of right and left arrows, a Home link, and the module names for which you have a license and a security level greater than zero (0). When you select Home, all windows will close and your designated home page will display in the workspace area.

Depending on the number of modules for which you have a license, you may not be able to see all of the modules. Previous and Next arrows are available on the navigation bar to scroll the modules. To navigate using the Next and Previous arrows, select a module name from the navigation bar. Use the Next and Previous arrow to move forward and backwards on the navigation bar.

Task list

The task list is an HTML-based navigation structure that is located in the left margins of the workspace area. The task frame includes the navigation bar and task list, which consists of links to windows that display in the workspace area.

When you select a link from the navigation bar, corresponding menu items display in the task list. A white arrow to the right of a task indicates a sub-task list exists and will display as a pop-up menu to the right of the selected task when you select the task. A white border will display around the task or sub-task item that has focus.

Workspace

Many tasks are accomplished within the workspace area, which is bordered by the navigation bar and task list.

Window title

The window title bar is located directly below the navigation bar. The window title replicates the task name you select on the task list. You can provide more information about the task you are performing by modifying the window title. The window title bar can also contain a right-justified image, for example, a logo.

The window title in the Manage customers window displays the task name with the Customer Type followed by the company's name when a company record type record is loaded. For example, Manage customers - Company Member - Prodigy Makers International. When all other records are loaded, the window title displays the Customer Type followed by the individual's name and designation.

Note: When selected, some task list items do not open a new window. The window title that displays for these items will replicate your previous selection.

Navigation for Customers

When you select Customers from the navigation bar, a specific task list appears on the left of your screen.

Note: Some task list items might not be visible, depending on the access granted by your iMIS administrator and whether you are licensed for certain iMIS features

Manage customers

Opens the Manage customers window that enables you to view, edit, or add customer records.

Manage committees

Opens the Manage committees window that enables you to enter or update committee rosters and appointee information, view or print lists, and produce labels or letters.

Manage chapter rosters

(visible only if licensed for Chapter Reporting) Opens the Manage chapter rosters window that enables you to access customer lists (all, current, future, and past) and data by chapter rosters.

View activity tasks

Opens the View activity tasks window that provides access to the built-in task reminder function in iMIS. You are presented with a summary of all open task activity records that includes items due for follow-up. You can review the open items in detail, print a detailed report, and remove closed items from the reminder list.

Manage Accumail (or Manage QAS)

(visible only if licensed for Accumail or QuickAddress) Opens a sub-menu of tasks for setting up and using the address verification system.

Manage duplicates

(visible only if licensed for Duplicate Merge Manager) Opens the Duplicate Merge Manager window that enables you to find, select, merge, delete, or keep possible duplicate records.

Generate reports

Opens the Generate reports window that enables you to print (or export) all standard output available through the Customers feature. The choices include a full array of detailed reports and rosters based on the customer file information, summary and statistical reports, labels, and table listings.

Import activities

Opens the Import activities window that enables you to create mass activity records.

IQA

Opens IQA in advanced mode and enables you to run predefined Intelligent Query Architect (IQA) queries on contacts and prospects.

Set up tables

Opens a sub-menu of tasks for configuring and maintaining the tables used by the Customers feature.

Set up module

Opens a sub-menu of tasks for configuring the behavior of the Customers feature.

Set up fundraising

Opens a sub-menu of tasks for configuring fundraising options.

Customer Data Management

The Customers feature is a collection point for customer information. In addition to basic contact information, the Customers feature also contains customer details and customer history. The customer data is managed using the Manage customers window.

Authorization levels for Customers

Your authorization level for Customers determines which functions you can access:

- To find and view customer records, you need at least authorization level 1.
- To run reports, you need at least authorization level 2.
- To create and edit customer records, you need at least authorization level 3.
- To add new addresses, you need at least authorization level 3.
- To delete customer records, you need at least authorization level 4 and the Allow Delete from Customer Portfolio option must be enabled by your administrator.
- To access the Manage tables window, you need at least authorization level 5.
- To access the Set up module window, you need authorization level 8.
- Access to the History area is based on security for each feature.

Customer data entry

The Manage Customers window enables you to add to and edit customer information.

iMIS features such as address verification and duplicate record checking help ensure that you enter useful and maintainable customer information. Your administrator can configure these options to best fit your organization's business rules.

To enter a new customer record

From the Manage customers window you can maintain name, address, and demographic data relating to customers. The unique feature of the Manage customers window is that you can activate virtually all customer-specific operations within one window.

1. From Customers, select Manage customers.
2. Click New.
3. (optional) Enter an ID number.

   Note: The ID field is grayed out when the Auto Assign Member Number option is enabled by your administrator.

   Note: If you do not have IDs auto-assigned, make sure you do not enter zero (0) for a customer ID.

4. (required) Select a Member Type description from the Member Type drop-down list .
5. Select a status other than Active, if appropriate.
6. (optional) Select a billing category description from the Category drop-down list.
7. (optional) Select a prefix from the Prefix drop-down list.
8. Enter the First Name, Middle initial, and Last Name.

   Note: When entering a new record, First Name, Last Name, or Company Name is required.
9. (optional) Select a Suffix from the drop-down list.
10. (optional) Update the Informal Name as needed.
11. (optional) Enter single or multiple (separated with a comma) Designation(s), or click the lookup icon to open the Select Values window and search designations defined by your administrator.
12. (optional) Select a Member Title from the drop-down list.
13. Click Save

    Note: You can continue with assigning a Company ID to this customer record next.

    To enter an address

    The three primary address tabs in the Manage customers window are titled according to the prompts entered for Main, 2nd, and 3rd on the Customer Setup - Address and Notes window (Customers> Set up module > General, Address and Notes). By default, the first address is set as the preferred address for mailing, billing and shipping purposes. However, you can customize which address is to be used for each purpose by setting the Preferred Mail, Preferred Bill, and/or Preferred Ship indicators on each of the three primary address tabs.

    Entering address information on the three primary address tabs:

1. Enter the address information for each tab as needed.
2. By default, the first address is automatically set as the preferred address for mailing, billing, and shipping purposes. However, you can customize which address is to be used for each purpose by setting the Preferred Mail, Preferred Bill, and/or Preferred Ship indicators on each of the three primary address tabs.
3. Click Save.

   If you need more addresses, populate the ADDRESS_PURPOSE general lookup/validation table with at least one value. (See “ADDRESS_PURPOSE (Validation)”). When you log back in to iMIS, a New address tab appears after the three primary address tabs, which lets you select an address purpose.

1. Select the New tab to open the New Address window.
2. Select an address purpose from the drop-down list.

   Note: You can create more than one address with the same custom purpose (defined in the General Lookup/Validation table for ADDRESS_PURPOSE), but multiples are not allowed for the standard purposes (defined in Customer Setup > Address and Notes).
3. Click OK.

   Note: When Accumail is licensed and installed, the Verify Addresses option is available.

   To enter a new company record in iMIS Desktop

1. From Customers, select Manage customers.
2. Click New.
3. (required) Select a Member Type description from the Member Type drop-down list.
4. Tab to the Company ID field and enter the company name or click the lookup icon to open the Find Company window and search available company records (see "Finding customer records").

   Note: When entering a new record, Company Name is required.

   Note: Company Sort is populated after you move out of the Company Name field.

5. Click Save, or continue with entering an address for this company customer record.

To select values for the Designation field

1. From Customers, select Manage customers.
2. Click the lookup icon on the Designation field to select a value.

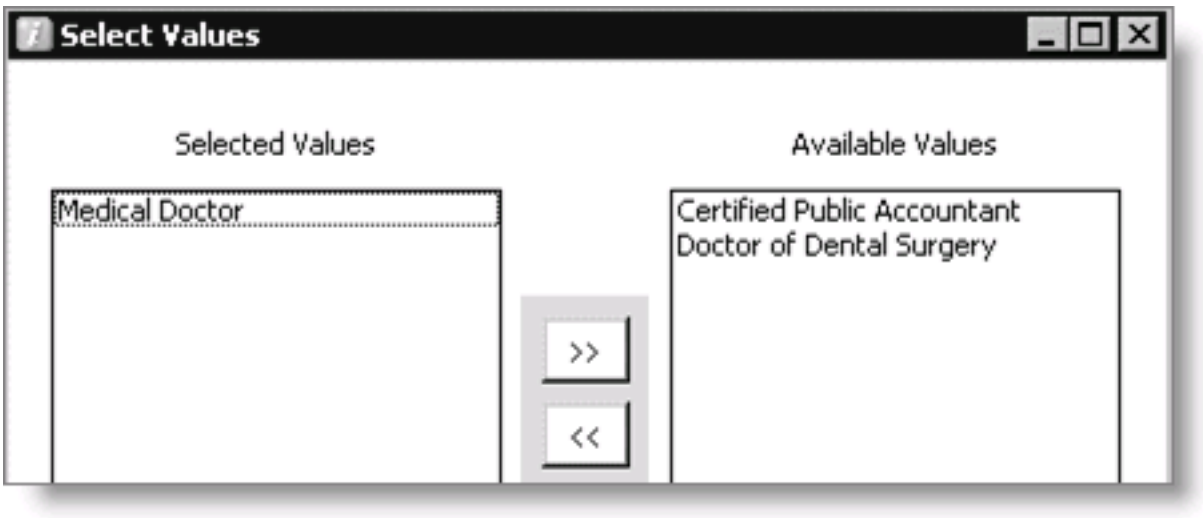
   The Select Values window opens.
3. Use one of the following methods to move items to the Selected Values list:

- Double-click the item in the Available Values list to move it to the Selected Values list.
- Select the item in the Available Values column and click << to move the item to the Selected Values list

4. Use one of the following methods to remove items from Selected Values list:

- Double-click the item in the Selected Values list to move it to the Available Values list.
- Select the item in the Selected Values list and click >> to move the item to the Available Values list.

5. Click OK to close the Select Values window.
6. Click Save on the Manage customers window to save the value(s) in the Designation field to the database.



The Select Values window

Finding customer records

Before you can view or edit a customer record, you must find the record. The Search and Find Company windows are available for locating customer records.

Opening customer records

You can open a customer's record from any of the following tabs in the History section:

- Results
- Record History
- Roster
- Relationships
- Role

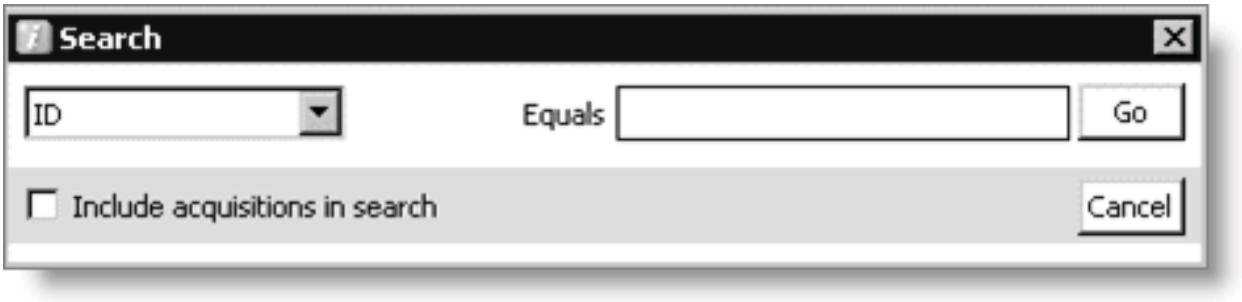
To open a customer's record, you can double-click anywhere within a customer's row in one of the above tabs (excluding the Relationships and Role tabs), you can use keyboard shortcuts, or you can use one of the two right-click menu items: Open and Open in New Window.

The Open menu item enables you to load the selected record in the active Manage customers window. The Open in New Window menu item enables you to open the selected record in a new iMIS instance.

Note: The menu items that are displayed below the Open and Open in New Window menu items enable you to navigate to a specific tab in the History section. For detailed information on navigating to tabs in the History section (see "Manage customers window - History tabs").

If you want to use keyboard shortcuts to open a customer's record, select the record in the tab and press Ctrl+R to open the record in the existing Manage customers window or press Ctrl+W to open the record in a new Manage customers window.

Search window



From Customers, select Manage customers, and click Find

Note: You can press Ctrl+F to open the Search window (perform a Find) only when the Manage customers window is not in edit mode and you are not in a single-instance, user-defined tab.

Drop-down list

Click the drop-down arrow to display a list fields on which you can search.

- ID - Returns the record for the ID specified, for example, 301.
- Name - Returns all records that meet the search criteria. For example, to search for all customers whose last name begins with Ski, enter SKI. To search for all customers with last name Skinner and first initial J, enter SKINNER, J.
- Company - Returns all records that meet the search criteria. For example, entering PRO will return all records where Name.COMPANY_SORT begins with Pro.

  Note: The company search feature is based on COMPANY_SORT, which uses the first 30 characters of the company name.
- Only Company - Returns company records only. For example, entering PRO will return all records where Name.COMPANY_SORT begins with Pro and Name.COMPANY_RECORD = 1.

  Note: The company search feature is based on COMPANY_SORT, which uses the first 30 characters of the company name.

- Major Key - (optional) User-defined field used for record searches. This option returns all records that meet the search criteria. For example, entering 526 will return all records whose Name.MAJOR_KEY starts with 526. The major key field is prefixed with the prompt configured by your administrator.
- Member Type Code - Returns all records that meet the search criteria. For example, entering N will return all records whose Member Type code starts with the letter N.

  Note: If you are using Acquisition Management to import records, the Imported List Code will display in the Member Type Code field.
- Indexes - (optional) Any of four data fields defined by your administrator to be used for searching. This index sorts the records according to the data in the specified field. For example, if your administrator designates
- State as one of the indexes, iMIS would maintain an index list of all records sorted in state order. This index lets you scan a customer list by state without searching the entire file.
- Interests as one of the indexes, iMIS would maintain an index list of all records sorted in interest order. This index lets you scan a customer list by interest without searching the entire file.

  Note: Results for user-defined indexes are returned in ID order.
- Chapter - Returns all records of those who have been billed dues for the chapter you enter as the search criteria (the full chapter name is required). For example, entering Travis will return all records where Subscriptions.CHAPTER is equal to Travis.
- Committee - Returns all records that meet the search criteria. The full committee name is required. For example, entering Technology will return all records where Activity.OTHER_CODE is equal to Technology
- Task Date - Returns all records that meet the search criteria.
  For example, entering 09/21/2000 will return all records where Activity.TICKLER_DATE is equal to 09/21/2000.

- Ad Hoc - Opens the Select Search Instructions window that enables you to enter search criteria to select specific records.

  Equals

  Specifies the search value. The prompt for this field will change depending on the search criteria shown. For example, when Name is chosen, the prompt displays as Begins with:

  Include acquisitions in search

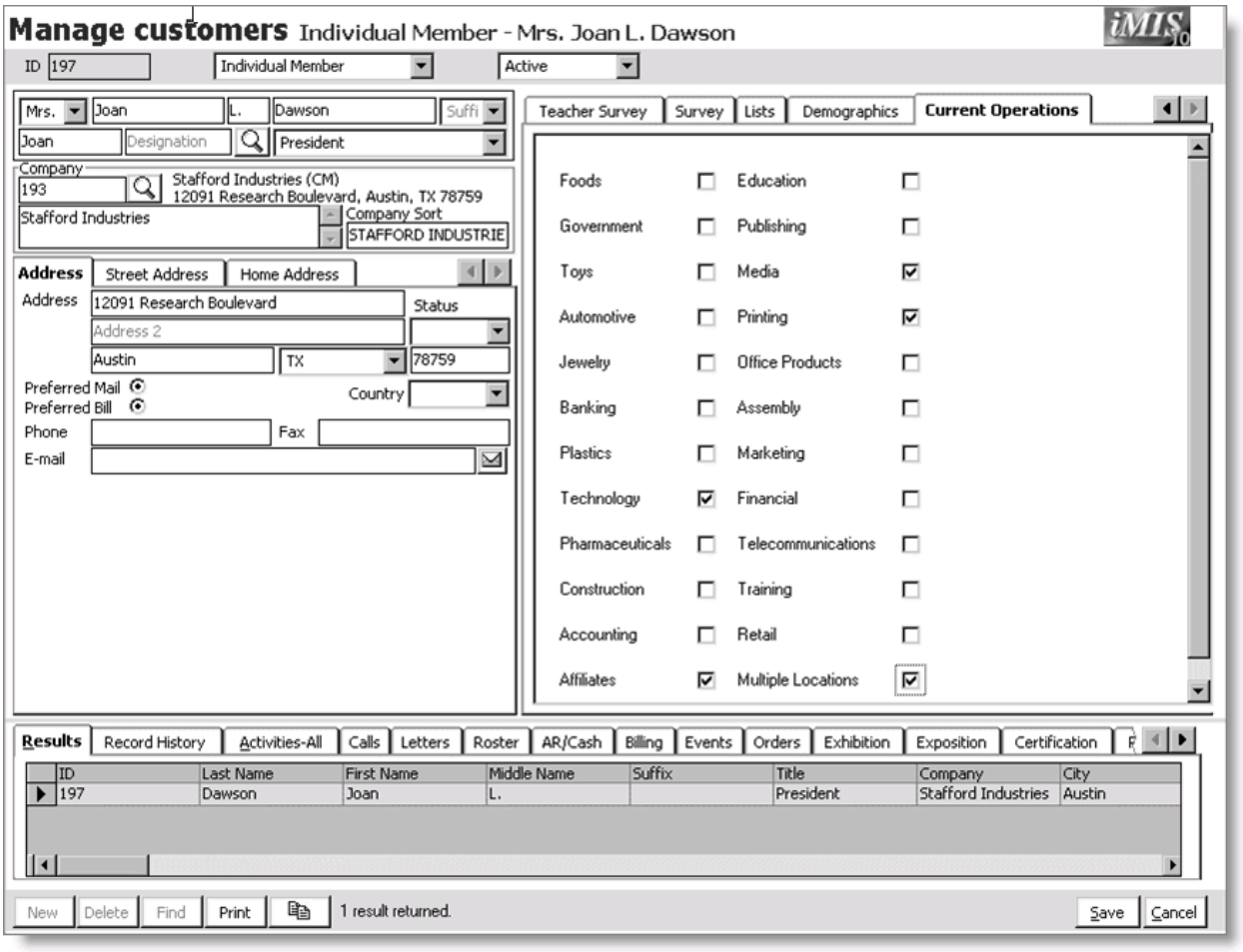
  Enable to include acquisitions from the Prospect table in the search. This option displays only when iMIS is licensed for Acquisition Management.

  To resize the Detail or History area

  A horizontal split window control, located between the Detail and History areas of the Manage customers window, enables you to view more data in the Detail and History areas and in user-defined tabs.

  A split window control is a vertical or horizontal bar that divides a window into areas referred to as frames. Moving the position of a split window control enables you to resize a frame as needed to view more data.

  To move the split window control, position your mouse pointer on the gray line between the History area and Main and Detail areas. Drag the control up to view more data in the History area or down to view more data in the user-defined tabs in the Detail area. Moving the split window control down will not change the Main area (Name, Company, and Address areas); the area below this area will display as blank space.



Manage customers window after moving split window control down

Note: Moving the split window control too far down will result in data in the History area becoming difficult to view.

To find and load a customer record

1. From Customers, select Manage customers.
2. To find a customer record,

- Click Find; or
- Press Ctrl+F to open the Search window.

Note: You can press Ctrl+F to open the Search window (perform a Find) only when the Manage customers window is not in edit mode and you are not in a single-instance, user-defined tab.

3. Select the search criteria from the drop-down list, for example, Name.

   Note: To bring up all customer records, leave the Equals field blank, and click Go. Depending on your setup, there may be a limit on the number of records returned. For large databases, blank name searches are not recommended.

   Note: The prompt for the search value field will change depending on the search criteria shown. For example, when ID is chosen, the prompt is Equals.

4. Enter the search value in the Begins with field.
5. Click Go. The Results tab is updated.
6. To view a record, select a row. Double-click a record on the Results tab to open it in the Manage customers window.
7. Select the tabs below to view additional information.

   To find and load a company record

   Note: The company search feature is based on COMPANY_SORT, which uses the first 30 characters of the company name.

1. Click the lookup icon in the Company area to open the Find Company window.
2. Select your search criteria, for example, Company.
3. Enter your search value, for example, the first letter of the company name in the Begins with field
4. Click Go to display the results.
5. Select the company and click OK, or double-click the company to link the company record with the customer record.

Note: If you select a company from the Find Company window and you have an existing value in the Company area, a system message asks if you want to overwrite the current company name and address.

Find Company window

From Customers, select Manage customers, and click the lookup icon in the Company area

Drop-down list

Click the drop-down arrow to display a list of searchable fields. These fields are configurable by your administrator.

Search value

Specifies the search value. The prompt for this field will change depending on the search criteria shown. For example, when Company is chosen, the prompt is Begins with.

Go

Used to start the search.

To open a record from a history tab

1. Select Customers > Manage customers.
2. Click Find.
3. Select or enter the search criteria and click Go. The Results tab displays the search results.
4. Double-click anywhere in the row of the record you wish to load.

5. Click on a history tab to show that tab's contents.
6. Double-click the record or the arrow on the left end of the record.

Modifying customer records

Use Customers to edit and delete existing customer records.

To edit a customer record

1. From Customers, select Manage customers.
2. Find the customer's record (see "Finding customer records").
3. When you load a record into the Manage customers window, iMIS is automatically in edit mode.
4. Make changes to the record, as appropriate.
5. Click Save.

To delete a customer record

Note: Your administrator can enable or disable the Delete button.

1. From Customers, select Manage customers.
2. Find the customer's record (see "Finding customer records").
3. Click Delete. A system message displays asking you to verify the delete.
4. Click Yes.

Data entry features

About customer data fields

Most fields on the Manage customers window do not display standard field labels to the left of each field. Instead, the field name is contained within the field as gray text. As data is entered in the field, the text changes to black as shown in the following example:

Fields in the Name area (Manage customers window)

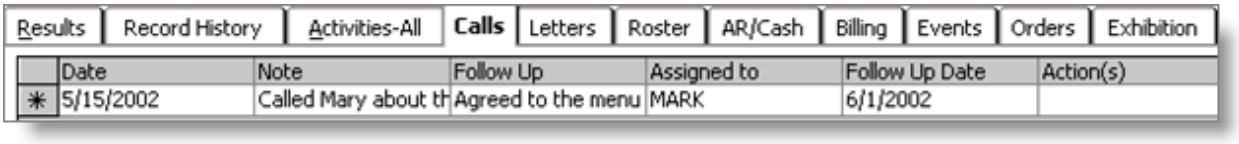
Fields on the Manage customers window are shown using different type colors or background colors to show their status.

- When there is no data in a field, the field label is shown inside the text box in gray, for example, the Prefix field in the previous example.
- When you select a field by selecting it directly or tabbing to it, the entire field label text is highlighted so that it can be easily replaced, for example, the Last Name field in the previous example.
- When the field has a value defined, the data is shown in black, for example, the First Name field in the previous example.

Field focus

Fields are color-coded to distinguish between data-entry fields and display-only fields.

Fields on the Calls tab have a white background, indicating that these fields are available for data entry.



Manage customers window - Calls tab

Fields on the Orders tab have a gray background, indicating that these fields are display-only.

Manage customers window - Orders tab

Duplicate record checking

iMIS checks for duplicate records using a formula that combines different parts of the customer's record to make a key. The formula that comes with iMIS is usually precise enough to catch duplicates, but in some situations, your administrator may need to customize (see "Formula for checking for duplicate records") the formula.

If iMIS detects one or more possible duplicate records, it will show a list of the possible matches and then gives you the choice of either continuing to add the record or canceling the addition.

Address verification

Address verification is an optional feature that may be implemented with your system. It checks addresses you enter against a database of valid addresses to help ensure that customers actually receive important communications and that your organization doesn't waste time and postal fees sending correspondence to invalid addresses. Your administrator configures the way address verification detects invalid addresses.

To select data from a drop-down list

A drop-down list displays pre-defined selections from which you can choose.

1. Click on the down arrow on the right side of the list to see the entire list.
2. Select an item from the list by clicking on the item.

   You can also perform a speed search, which can be helpful in selecting items from long lists. For example, if you type ca in the Country drop-down list, you immediately scroll to the first country that starts with the letters "Ca". You can then use the down arrow or up arrow keys to move to the next or previous items in the list.

   The speed search feature expects you to enter the search string quickly. If you pause typing for more than 2 seconds, the search is based on what you have entered up to that point. For example, if you type c in the Country drop-down list, wait a few seconds, and then type a, the list scrolls to the first country that starts with the letter "C", and then scrolls to the first country that starts with the letter "A".

Note: Some fields look like drop-down lists but are really combination fields that allow you to enter new values or choose from previously entered values. Combination fields do not support the speed search feature.

Reviewing undefined values

The Manage customers window displays (Undefined) beside values in fields that have been deleted from an iMIS table. Table deletions are allowed in iMIS, regardless of the entries in the Name tables.

You are not required to edit this value, but once another value is chosen from the drop down list, the (Undefined) value will no longer be available.

Date field data entry

iMIS can automatically format and complete dates for you when entering customer data.

Note: Dates entered in the Fundraising history tab are not automatically completed or formatted.

Date formatting

In Customers > Manage customers, you can enter a date in a date field using any type of date separators (slashes, dashes, periods, or spaces) or no date separators.

Dates can be entered in numeric or alpha-numeric format (“03/01/09” or “March 1, 2009”).

When you enter unformatted dates in customer-related date fields, iMIS interprets and formats the dates according to your workstation's date format (configured on the Windows Control Panel).

Note: Workstation date settings take precedence over the iMIS Date Format setting in File > System Setup.

Date completion

If you enter an incomplete date, such as 0304, in a date field, iMIS completes the date by adding the current year to the end of the date.

If you enter only one or two digits of a date, such as 3, iMIS attempts to interpret those digits as a day in the current month. If the number is not a valid date for the current month, for example, 33, a message informs you that you must enter a valid date.

Company flow down in iMIS

In order to flow down complete address, phone, and fax data from a company to linked individual records, data must be entered in both the Main address tab of the Address area and the Profile tab of the Detail area.

Enter the complete address that will flow down in the Main address tab of the Address area. The address entered in the Main address tab is the only data entered in the Address area that flows down from company to individual records. The phone and fax data entered in the Address area's address tabs are stored in the Name_Address table and do not flow down.

Enter the Phone and Fax numbers that will flow down in the Profile tab of the Detail area. The data entered in the Profile tab of the Detail area is stored in the Name table.

Note: User-defined company flow down does not support the Work Phone, Home Phone, Fax, and E-mail fields. No error message displays if you specify these fields in the User Defined Company Flow Down field on the Customer Setup - Advanced window, but specifying these fields in the User Defined Company Flow Down field has no effect on user-defined company flow down. The Work Phone and Fax fields are part of automatic company flow down, which can be used separately or in addition to user-defined company flow down.

Working in data grids

The History and Detail sections of the Manage customers window display information in a data grid. You can resize these sections of the window and resize the data grids, if needed.

To navigate within a data grid

Use the following keyboard controls to navigate within those tabs in the History and Detail sections of the Manage customers window that display information in a data grid (such as in the Salutations, Billing, or multi-instance, user-defined tab):

- Page Up - Press this key to move the focus on the grid up one full screen. If the current record is on the top page of the grid, pressing this key will move the focus to the top record of the grid.
- Page Down - Press this key to move the focus on the grid down one full screen. If the bottom visible row is already visible in the current display, pressing Page Down will move the focus to the last record in the grid.
- Home - Press this key to move the focus on the grid to the first column of the current row in the grid. If the cursor is in a cell and blinking and at least one character exists in the field (as in data entry mode), the tab focus will move to the beginning of the data in that cell. If you press Ctrl+Home, the focus moves to the top record in the entire grid, scrolling if necessary.
- End - Press this key to move the focus on the grid to the last column of the current row in the tab. If the cursor is in a cell and blinking and at least one character exists in the field (as in data entry mode), the tab focus will move to the end of the data in that cell. If you press Ctrl+End, the focus moves to the last record in the entire grid, scrolling if necessary.

To resize a data grid

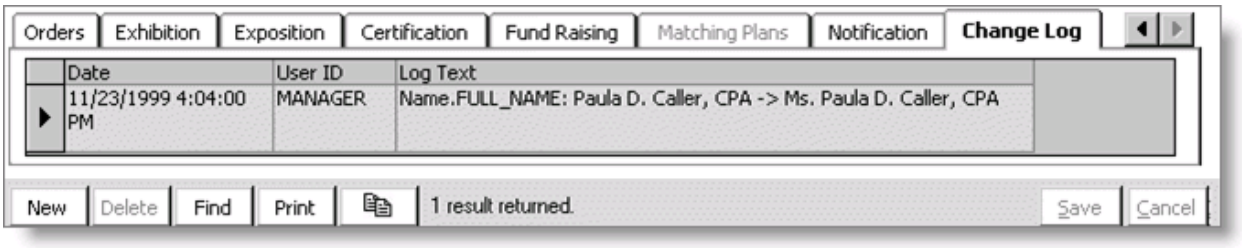
You can resize data grids in the Detail and History sections according to the following:

1. To adjust the width of a data grid, drag the boundary on the right side of the column heading until the column is the width you want.
2. To adjust the height of a data grid, drag the boundary on the row heading until the row is the height you want.

   Note: When the height of a row is increased and a field contains a drop-down list, a single drop-down arrow displays. To select a value, you must double-click the single drop-down arrow (a second drop-down arrow displays at the top of the column) and click the top drop-down arrow.
3. To hide an unused column of a data grid, drag the boundary on the left side of the column heading until the column you want to hide is no longer visible.

Example 1

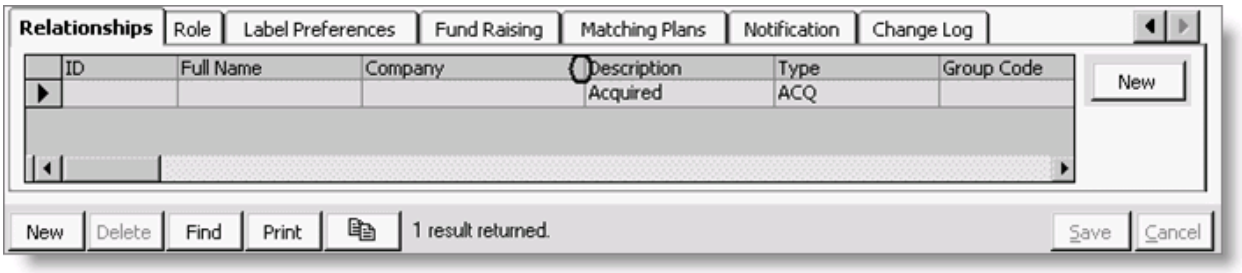
In the following example, to expand the Log Text field and lengthen the Date field to display more data, drag the boundary at the end of the Log Text field to the right and the boundary at the bottom of the field to the left of the Date field:



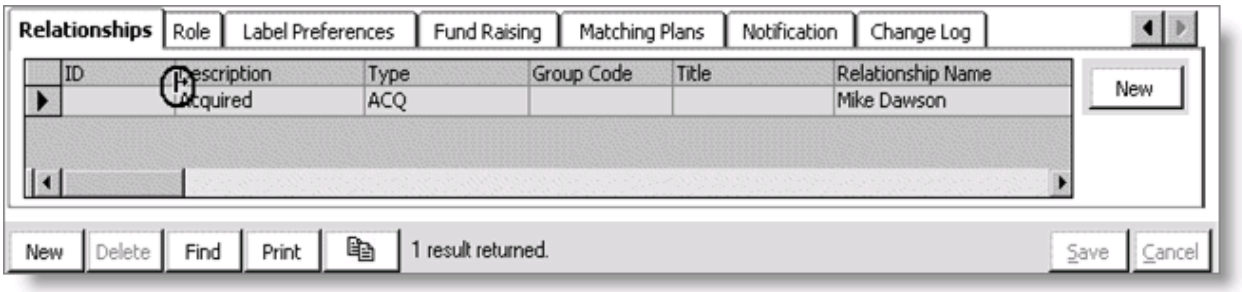
Sample Change Log tab after adjusting data grid

Example 2

To hide the Full Name and Company fields on the Relationships tab to view the Relationship Name without having to scroll, drag the boundary at the beginning of the Description field to the left until you reach the end of the ID column (the cursor changes to a half I-beam to indicate a field is hidden).



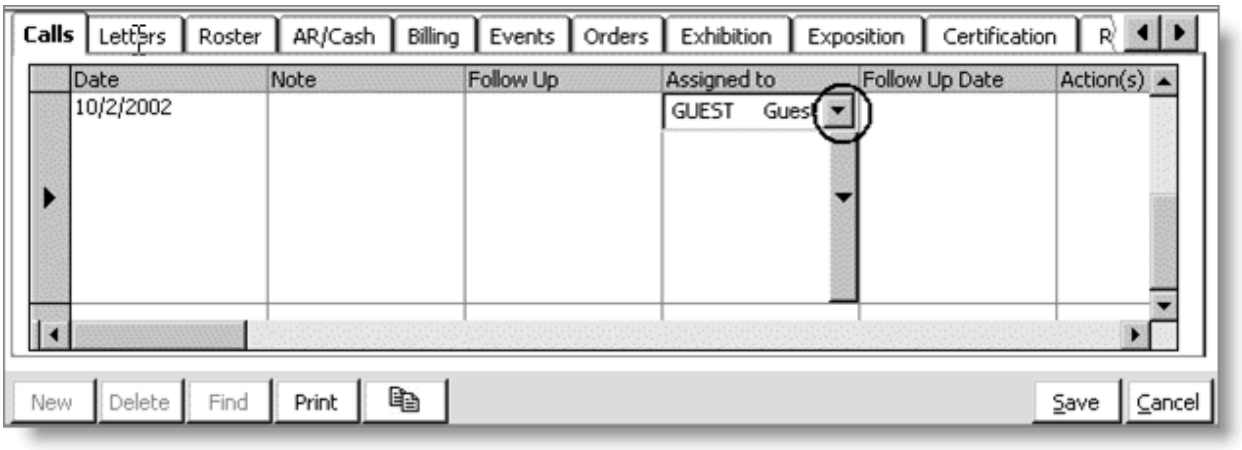
Sample Relationships tab showing boundary to select to hide Full Name and Company fields



Sample Relationships tab after moving Description field

Example 3

To select a value from the Assigned to drop-down list on the Calls tab after increasing the height of a row, double-click the single drop-down arrow (a second drop-down arrow displays), and click the top drop-down arrow.



Sample Calls tab showing the drop-down arrow from which to select a value

Selecting multiple values for user-defined fields

You can select more than one value for single-instance and multiple instance user-defined fields if your administrator has defined the fields as Multi Select.

A multi-select field for a single-instance, user-defined tab displays as a gray, read-only list box that displays the selected codes as a comma-delimited list.

- Single-instance multi select fields have a Select Values button located to the right of the field. When you click this button, the Select Values window opens, allowing you to make and modify selections for the field.
- Multiple instance multi-select fields have a drop down arrow to the left of the field. When you click this button, the Select Values window opens, allowing you to make and modify selections for the field.

The Select Values window contains two columns of text:

- The Selected Values column contains those values currently selected for the multi-select field.
- The Available Values column contains the values available for selection. These values are defined by your administrator.

  To move values between the two columns, click the Left and Right arrow buttons located between the Available Values column and the Selected Values column.

  All fields listed in the Selected Values column will be saved for the loaded customer when you click the Save button.

  If you click the Cancel button, when the page reloads the selected values will revert to the previously saved values (if any).

  If no values exist for a single-instance, multi-select field, no values will display in the Selected Values column.

  Note: If you make changes to a multi-instance tab, you must save or cancel your changes before selecting another tab. If you make any changes in a multi-instance, user-defined tab and attempt to change tabs, a message asking you to save or cancel your changes is displayed.

  To select multiple values for a user-defined field

1. From Customers, select Manage customers.
2. Select the user-defined tab that contains the multi-select field.
3. Click the Select Values button located to the right of the field to open the Select Values window.
4. Move items from the Available Values column to the Selected Values column:

- Click an item in the Available Values column to highlight it then click the Left arrow button to move the item to the Selected Values column - or - double click the item to move it from one column to the other.
- Repeat to move additional items.

5. Move items from the Selected Values column to the Available Values column:

- Click an item in the Selected Values column to highlight it then click the Right arrow button to move the item to the Available Values column - or - double click the item to move it from one column to the other.
- Repeat to move additional items.

6. Click OK. The values you selected in the Select Values window are displayed in the field.

To enter single-instance user-defined information

Once a user-defined window is chosen, you will need to select a field within the window to be able to Tab through the fields.

1. Open a customer's record in the Manage customers window.
2. Select the appropriate tab to display a single-instance user-defined window (for example, the Lists tab).
3. Select one of the following:

- Any option to enable or disable a field, for example, the Newsletter option.
- Any character field to enter text, for example, the List Codes field.
- Any scrolling-list to select values, for example, the Interest Codes scrolling-list.

Note: See Selecting multiple values for user-defined fields.

4. Click Save or continue entering additional detail information.

To enter multi-instance user-defined information

1. Open a customer's record in the Manage customers window.
2. Select the appropriate tab to open a multi-instance user-defined window.
3. Click in the first field on the tab to display the drop-down list.
4. Select the drop-down arrow and select the appropriate value.

5. Tab to each field and enter the appropriate values. Pressing Tab while in the last field of the row enables the next row.
6. Click Save when you are done entering data.

   To delete data from a multi-instance, user-defined record

   You can use the following two methods to delete data from multi-instance, user-defined tabs:

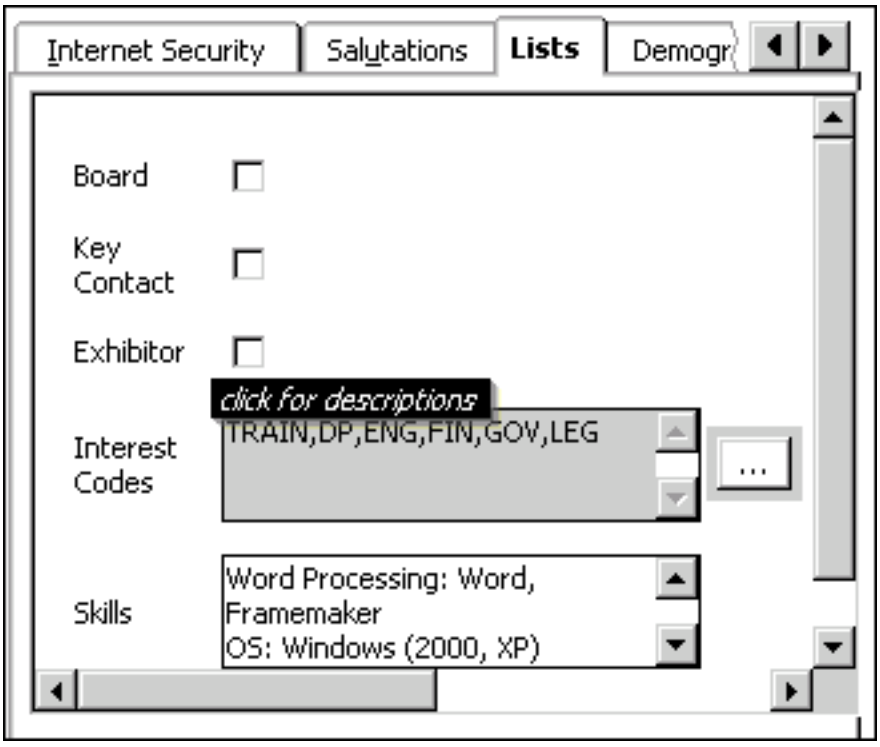
- Select the entire row in a tab and press Delete on your keyboard. When you select this method, all of the fields in the row are deleted from the user-defined tab from which you perform the delete, as well as any other multi-instance, user-defined tabs that contain those fields.
- Select the data in a field and press Delete on your keyboard. When you select this method, the data in the field is deleted from the user-defined tab from which you perform the delete, as well as any other multi-instance, user-defined tabs that contain the field.

  Note: When deleting data from multi-instance, user-defined tabs, a data row is not permanently removed from the database until all the fields for the multi-instance table are deleted, either by blanking data from a field or by selecting and deleting an entire row.

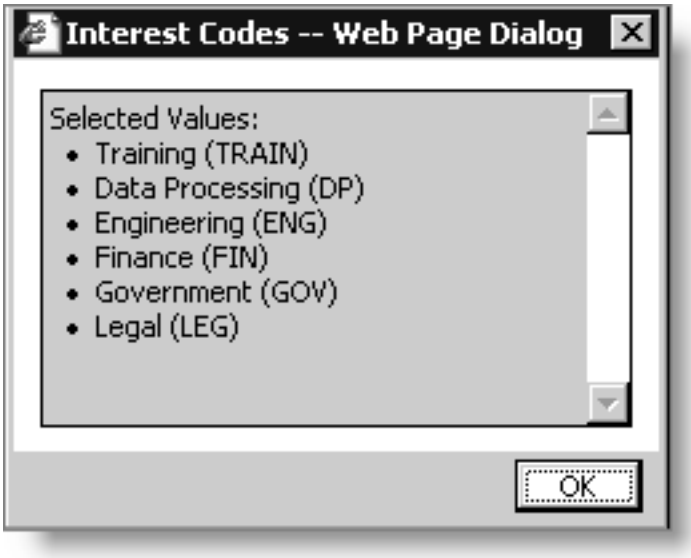
  To view multiple-select fields

  If a multi-select field contains any value, positioning the cursor over the field displays a tooltip containing the message click for descriptions above the cursor. To view the selected values for the field, click the mouse while the tooltip is displayed. The field contents display in a window even if the field is read-only for the current user. You can use the scroll bars or resize the window, if needed.

  Note: To display tabs for user-defined windows, you must add the window to the list of visible tabs on the Customer Portfolio Tab Preferences window.



Example of a multi-select field showing the click for descriptions message that displays when the cursor is over the field

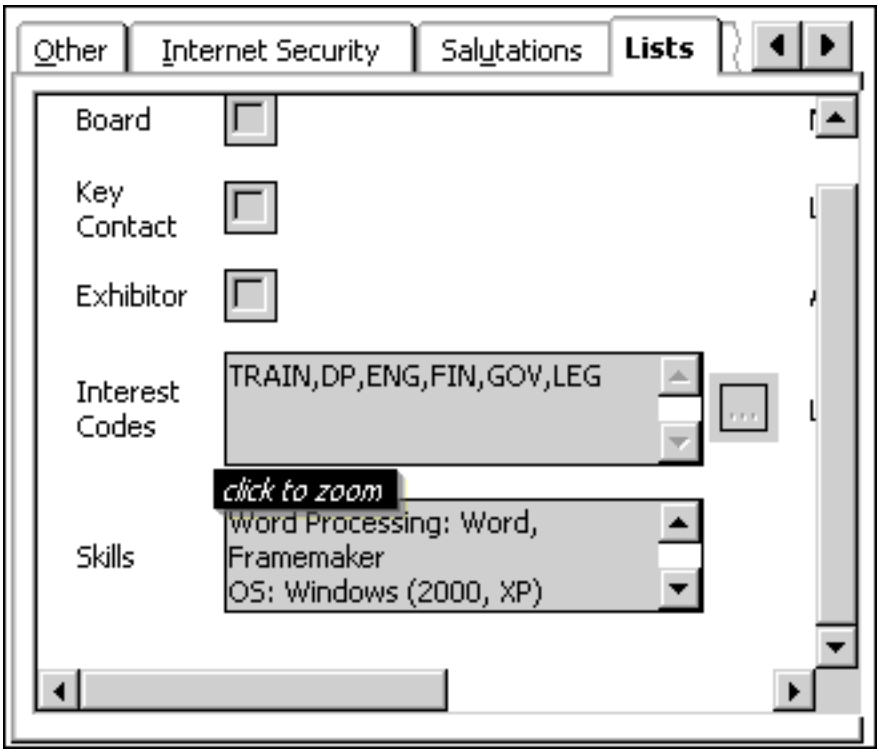


Example of window showing descriptions of currently selected values for the multi-select field shown in the previous example

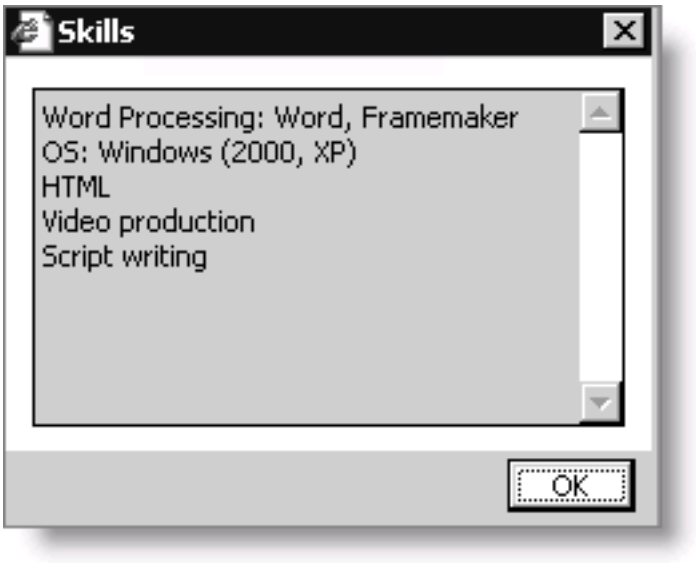
To view read-only text fields

When the data in a read-only text field is not fully visible because the data exceeds the field size, positioning the cursor over the field displays a tooltip containing the message click to zoom. To view the full contents of the field, click the mouse while the tooltip is displayed.

Note: To display tabs for user-defined windows, you must add the window to the list of visible tabs on the Customer Portfolio Tab Preferences window.



Example of a read-only text field showing the click to zoom message that is displayed when the cursor is over the field



Example of the window displaying the entire contents of the read-only text field from the previous example

The data in the window is display-only. You can use the scroll bars or resize the window if needed. Click OK to close the window.

To view data on multiple-instance, user-defined tabs in a non-grid format

You can view or enter/edit data in a multi-instance, user-defined tab in a non-grid format by opening a window for a specific row in the data grid. The row-specific data window displays if you double-click on a data grid row.

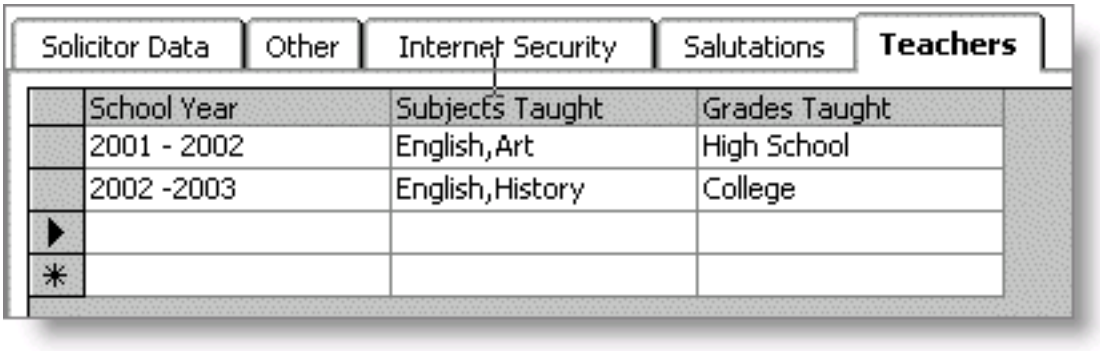
If you have permission to edit the values in the data grid, you can edit values in the row-specific data window. Any values that are changed in this window are automatically updated in the corresponding data grid rows when you click OK on this window. If you click Cancel, any values changed in the window will not be transferred to the corresponding grid row.

If you have permission to enter records in the data grid, you can enter new records directly in the row-specific data window. Records entered in the row-specific data window will be added to the data grid when you click OK.

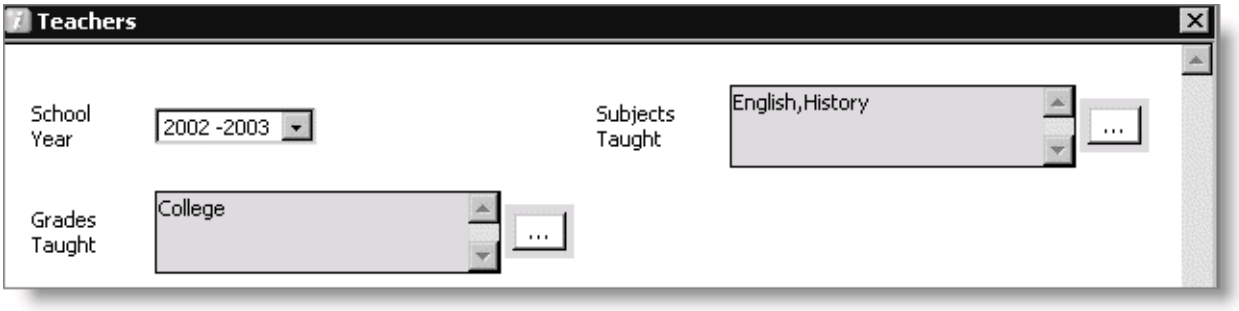
Changes or additions made in the row-specific data window are not saved to the database until you click Save on the Manage Customers window.

If the data grid is read-only, a record can be viewed in a row-specific data window, but the information in the window cannot be edited and you cannot enter new records in the window.

Validation of values entered in the row-specific data window uses the same logic as the validation of values entered in the data grid. Values entered in the row-specific data window are saved to the database after clicking OK on the row-specific data window and then clicking Save on the Manage customers window.



Example of a multi-instance, user-defined tab (from Customers, find a customer record, then select a multi-instance, user-defined tab)



Example of the second row from the multi-instance, user-defined tab show in the previous example displayed in a window format (in the data grid, double-click on the gray box located to the left of the row you want to view)

To view or edit data on multiple-instance, user-defined tabs

1. From Customers, find a customer record.

2. Select the multiple-instance, user-defined tab you want to view.
3. Double-click on the gray box located to the left of the row you want to display in a non-grid data window.
4. View or edit fields.

- Click Cancel to close the window without making changes.
- Edit fields in the window, then click OK and click Save on the Manage Customers window.

Using the Clipboard icon

The Clipboard icon enables you to copy the name and address information of the current customer onto your workstation's Windows clipboard. You can then copy or paste this information into other applications such as a word processing application.

The Clipboard icon

Your administrator can customize the fields that are copied to the clipboard (see "Customizing clipboard fields") to include more information.

To copy customer information to the clipboard

1. Load a customer record.
2. Click the Clipboard icon located at the bottom of the window. The customer's name and additional fields configured by your system administrator are copied to the system clipboard.

   Note: Many applications enable you to transfer information from the Clipboard using a menu option such as Edit > Paste or using the key combination Ctrl+V.

Running multiple iMIS instances

You can open multiple instances of the Manage customers window simultaneously and independently of each other. The number of instances that you can open depends on the number of licenses you have purchased and the system resources (memory, disk space, and so forth). For example, if you have a five-user license, you can open five instances of iMIS.

Note: If you open more than five instances of iMIS, we recommend you increase your system memory to 256 MB RAM.

Note: You may receive one of the following error messages when attempting to open multiple instances of iMIS:

“Error opening iMIS Standard Data file (iMISSTD.DF1). The file's read-only attribute may be set. Click OK to exit.”

“A new iMIS workspace cannot be started. You may have exceeded your license count. Click OK to exit.”

These error messages may indicate that the iMISSTD.DF1 file cannot be found, that the file is set as read-only, or that you are trying to open multiple instances of the Manage customers window without a multi-user license.

The first instance of the Manage customers window is opened by selecting Customers from the navigation bar and selecting Manage customers from the Customers task list. Subsequent instances are opened by repeating this action or from the Manage customers window (see To open a customer's record in the Manage customers window (see "Opening customer records")).

To help distinguish between multiple iMIS instances, the current customer information displays in the iMIS window title.

Managing tab preferences

The Customer Portfolio Tab Preferences window enables you to customize the Detail and History areas of Customers > Manage customers. You can hide tabs that you do not want

to display in the Detail and History area, and you can customize the order in which the tabs display in the area.

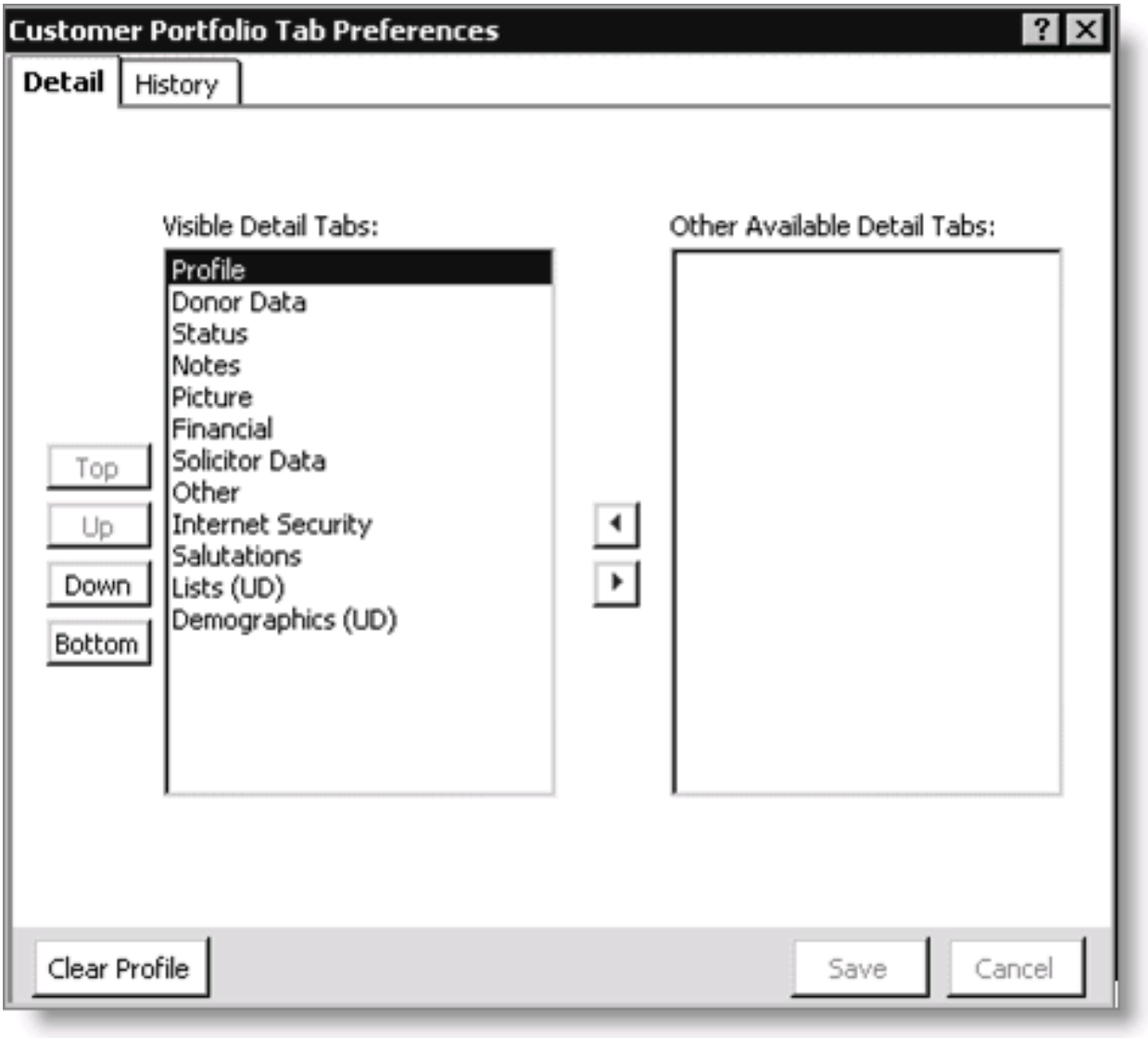
Note: A maximum of 60 tabs can be displayed for each profile (Detail and History), which can include up to 15 multi-instance user-defined tabs. If you attempt to add more than 60 tabs to the list of visible tabs on the Detail or History tab of the Customer Portfolio Tab Preferences window, a message informs you that the 60-tab limit has been reached and that no more tabs can be displayed.

Administrators can customize the default Customer Portfolio Tab Preferences, which will determine the tabs visible to users who do not set their own tab preferences.

User-defined, multiple-instance, and activity tabs do not display by default; you must add these tabs to your tab preference profile. If you do not have a tab preference profile, you must create one (from Customers, select Manage customers, place the cursor over the Detail tabs, right-click, and select Edit Tab Preferences) to display any tabs other than the iMIS-defined default tabs. See, Creating Tabs for Activity Types for more information about creating activity tabs.

Note: All user-defined, multiple-instance, and activity tabs in the Customer Portfolio Tab Preferences window display with (ACT) appended to the end of their name. For example, the Calls and Letters activities will display as Calls (ACT) and Letters (ACT) on the Customer Portfolio Tab Preferences window; however, in the History area of the Manage customers window the actual tabs will display as Calls and Letters, respectively.

Customer Portfolio Tab Preferences window



Right-click in either the Detail or History area and select Edit Tab Preferences

Detail

Select this tab to configure the tab preferences for the Detail area of Customers > Manage customer.

History

Select this tab to configure the tab preferences for the History area of Customers > Manage customer.

Visible Detail Tabs

Lists all of the tabs enabled to display in the Detail and History areas of Customers > Manage customer.

Detail area - When editing or setting up your profile, you must leave at least one tab listed in the Visible Detail Tabs field for the Detail area of your Customer Portfolio profile. If you do not leave at least one tab listed in the Visible Detail Tabs field, you cannot save the profile.

Other Available Detail Tabs

Lists all of the tabs that are hidden from view in the Detail and History areas of Customers > Manage customer. Tabs display in list order in the Detail and History areas.

Top

Moves the tab(s) selected in the Visible Tabs list to the top of the list and the beginning of the display order.

Up

Advances the tab(s) selected in the Visible Tabs list by one tab in the list and in the display order.

Down

Moves the tab(s) selected in the Visible Tabs list back by one tab in the list and in the display order.

Bottom

Moves the tab(s) selected in the Visible Tabs list to the bottom of the list and the end of the display order.

Left arrow

Moves the tab(s) selected from the Other Available Tabs list to the bottom of the Visible Tabs list. Moving a tab to the Visible Detail/History Tabs list displays the tab in its respective area of Customers.

Right arrow

Moves the tab(s) selected from the Visible Tabs list to the Other Available Tabs list. Moving a tab to the Other Available Tabs list removes the tab from its respective area of Customers.

Clear Profile

Clears any custom profile settings and returns the tab preferences to the default setting. This is useful when license keys have changed and new tabs exist that are not in the your profile. Clearing the profile will display all of the tabs in their default order in the Detail and History areas.

Customers tab security

User access to tabs is controlled by:

- iMIS module licensing - A module-specific tab can only be used if the iMIS installation is licensed for that module.
- iMIS authorization levels - A module-specific tab can only be used if the user has the appropriate module-specific authorization level.
- iMIS access keywords - A keyword-protected tab can only be used if the user has been assigned the appropriate keyword.

The rules governing tab availability in Customers > Manage customers determine tab availability in the Customer Portfolio Tab Preferences window.

A/R Cash, Billing, Events, Exhibition, Exposition, Orders, and Fundraising tabs

These tabs require users to have a module-specific Authorization Level of 1 or higher.

Label Preferences tab

This must be set up by your administrator.

Salutations and Role tabs

This must be set up by your administrator.

Call, Letters, and Fundraising tabs

This must be set up by your administrator.

User-defined tabs

User-defined tabs can be hidden by your administrator.

To open the Customer Portfolio Tab Preferences window

1. From the Detail section:

- Open a record in the Manage customers window.
- Right-click in the Detail section's tab-strip to display the right-click menu. If a record is not loaded in the Manage customers window, you will not be able to open the right-click menu from the Detail section's tab-strip.
- Select Edit Tab Preferences from the list to open the Customer Portfolio Tab Preferences window.

2. From the History section:

- Right-click in the History section's tab-strip to display the right-click menu (a record does not have to be loaded).
- Select Edit Tab Preferences from the list to open the Customer Portfolio Tab Preferences window.

To customize tabs in the detail and history areas

1. Open the Customer Portfolio Tab Preferences window.

- Place your cursor over the Detail tab and right-click.
- Select Edit Tab Preferences.

2. In the Customer Portfolio Tab Preferences window, click the Detail or History tab to configure tab preferences for the appropriate area of the Manage customers window.
3. Select the tab item(s) from the Other Available Detail Tabs or from the Other Available History Tabs list that you want to display in the Manage customers window.

Note: Press Ctrl or Shift to make multiple selections.

4. Select the Left-arrow button to move the selected tab item(s) to the bottom of the Visible Detail Tabs or Visible History Tabs list, or double-click to move tab items individually.

Customizing the default Tab Preferences

The Load default button is visible only to an administrator with a system management level of 8 or higher, and only when the administrator's own profile is loaded. If the default profile is currently loaded, the window title is System Default Tab Preferences and Load personal appears in place of Load default. (Selecting Load personal reloads the administrator's personal profile.)

To customize the default Tab Preferences profile

5. Go to Customers.
6. Right-click the top of the Details or History pane.
7. Select Edit Tab Preferences.

   The Customer Portfolio Tab Preferences window opens and the administrator's own profile is loaded.
8. Switch to the default profile by selecting Load default.
9. Edit the default settings.
10. Select Save.
11. Restart iMIS for your changes to take effect.

Detailed Customer Data

The Customers feature contains significant amounts of customer information. At times, however, you may need to access more specialized customer data. The Detail area of the Customers feature offers tabs that provide an additional means for accessing specialized customer data including:

- Profile, donor, and solicitor data
- Status
- Notes

- Picture
- Financial
- Salutations
- Log

Your administrator can also create a custom tab for the Details pane of the Customers feature.

About Detail and History tab preferences

Detail and history tabs are not displayed by default; you must add these tabs to your tab preference profile. If you do not have a tab preference profile, you must create one.

By default, the Results tab is the leftmost tab in the History tab area, but you can change the order in which tabs are displayed with the Customer Portfolio Tab Preferences window.

Note: Tabs that can be disabled cannot be selected as the first tab of the Detail area's profile, and you cannot to save a profile in which the first Detail tab is restricted according to customer type.

The Customer Portfolio Detail and History tab areas can each have up to 60 tabs displayed.

Manage customers - Detail area

The Detail area of the Customer Portfolio contains detailed customer information.

Tips

- Additional tabs appear if you are licensed for VAT or Fundraising, or have user-defined tabs.
- The slider control at the top right of the detail area lets you scroll across to see more tabs.
- Once you select a tab in the Detail area, click a field in the tab to activate the area.

For example, when the Profile tab is selected, click in the Work Phone field to activate the area. Press Tab to move the cursor to the next field.

- When you reach the last field on the Profile tab, select a tab in the Detail area and click any field to activate it.

  For example, if you need the Join Date on the Status tab, press Alt+T to activate the Status window, and click in the Join Date field.

  To navigate within the Detail area

  In most cases, more tabs exist in the Detail area than can be viewed at any one time without scrolling.

  To navigate to a specific tab:

- Select the right or left arrow buttons at the far right of the tab areas to scroll through the tabs. Select the specific tab when the tab you need to access displays, or
- Right-click to display a list of all the tabs in the area and select a menu item to display a specific tab.

  Note: You can navigate to a specific tab only when the Manage customers window is in New or Edit mode, and some tabs will be available only when in Edit mode.

  You can right-click anywhere on the Detail area's tab-strip to display a list of all the enabled Detail tabs (disabled tabs are grayed out and cannot be selected). The tab currently displayed is grayed out in the list. Selecting a tab from the menu's list directly opens that tab.

  Note: You can also select the right or left arrow to scroll through the tabs.

  To enter customer details

  Company flow down, an automatic process of updating specific fields when a Company ID is assigned to a Member ID, will automatically populate the Work Phone, Fax, and Toll Free fields. Additional flow-down options can be defined by your administrator.

1. Open a customer's record in the Manage customers window.

2. Select the appropriate detail section tab.
3. Tab to each field and enter the appropriate values.
4. Click Save, or continue to enter additional detail information.

Manage customers window - Profile tab

From Customers, select Manage customers, find customer record, and select Profile tab

Note: Your administrator can map the Work Phone, Home Phone, Fax, and E-mail fields on the Profile tab to the Phone, Fax, and E-mail fields on any address purpose defined in the Main, 2nd, or 3rd fields on the Customer Setup - Address and Notes window.

Work Phone

Specifies the business phone number, including any phone number extensions.

Home Phone

Specifies the home phone number.

Fax

Specifies the fax number.

Toll Free

Specifies the toll-free phone number.

E-mail

Specifies the e-mail address of the customer. If you have a MAPI32-compliant e-mail application software and Internet access on your system, select the envelope icon to send an e-mail directly from the customer record.

Web Address

Specifies the Web address of the customer. If you have Internet access on your system, select the world icon to open the Web address in your browser.

Major Key

Specifies a primary field with which you can retrieve records. iMIS will make this field available for referencing and searching for customer records throughout the system. For example, you can use social security numbers, certificate numbers, license numbers, and old customer ID numbers. You can make the major key unique in order to prevent duplicate entries.

The major key field is displayed with a prompt entered by your administrator.

Functional Title

Select the drop-down arrow on this field to select a larger grouping for the Title field. This drop-down list is set up by your administrator.

For example, you could use a Functional Title grouping for Accounting for specific mailings to officers related to the accounting function. If you specify functional titles for your customers, you can also display or print company rosters with the individuals listed by functional title grouping. You can also look up all individuals in a Functional Title grouping.

Manage customers window - Donor Data tab

From Customers, select Manage customers, open a customer record, and select the Donor Data tab

Solicitor

Enter the customer ID of the solicitor associated with the customer. The solicitor specified here is the default solicitor that displays in the Enter and edit gifts window.

Do not phone

Enable if the customer does not want to be called.

Do not email

Enable if the customer does not want to receive e-mail. This option is for informational purposes only and does not prevent e-mail from being sent to the customer.

Do not solicit

Enable if the customer does not want to receive solicitations.

Do not sell

Enable if the customer does not want to make donations.

Preferred Distribution/Premium

(Applies only to memorials and tributes) Enter the preferred distribution or premium for gifts that are made in memory of or in honor of the customer. If a preferred distribution or premium is specified, the preferred distribution or premium automatically populates the Distribution field on the Overview tab on the Enter and edit gifts window when a memorial or tribute donation is made in honor of this individual. This distribution or premium can be overridden.

List as

Specify how the customer is to be listed on printed materials and reports. This can be overridden.

Anonymous button

Enables you to specify that the “list as” information for this customer is Anonymous. Although Anonymous will display in the Enter and edit gifts window, you can override this while entering a gift.

Receipting Interval

There are four options for assigning a receipting interval to the customer that display in this area. All interval values are compared to the system date and the “last receipt printed” date to determine if a new receipt should be issued.

- None - If this option is enabled, no receipting interval is activated. This is the default setting. Any non-receipted gifts matching the selection criteria are issued a receipt.
- Quarterly - If this option is enabled, receipts are not automatically generated with another receipt batch until the quarterly interval (90 days) has passed.
- Monthly - If this option is enabled, receipts are not automatically generated with another receipt batch until the monthly (30 days) interval has passed. The monthly interval is always equal to 30 days.

- Annually - If this option is enabled, receipts are not automatically generated with another receipt batch until the annual interval (365 days) has passed.

  Last Receipt Date

  (System generated - Display only) Displays the date of the last receipt issued for the customer. Updates after a receipt is printed and cannot be updated manually.

Manage customers window - Status tab

From Customers, select Manage customers, find customer record, and select Status tab

Chapter

The prompt for this drop-down list displays when the Chapter prompt is set up by your administrator. Select the drop-down list on this field to select from chapter names defined by your administrator.

Join Date

Specifies the date the customer became active. Use a forward (/) to separate the month, day, and year values. When you enter a day, the system month and year is automatically entered.

Paid Through Date

Specifies the date that customer benefits expire. This date is updated upon Dues Payment (Cash Dues System) or Dues Billing (Accrual Dues System Option) processing.

Member Status

This display-only field displays one of the following status options:

- New - iMIS sets the status to N when you insert a new customer record and when you change a nonmember record to a customer record (except for records with status D). If a record's status is blank, posting a Billing payment (advancing the PAID_THRU) will trigger status N.
- Dropped - iMIS sets the status to D when you change a customer record to a nonmember record (which may already have status D) and when the Name.STATUS changes to an S* (suspended), I* (inactive) or D* (deleted) code from one that was neither S* nor D* (includes A* (active)).
- Renewed - iMIS sets the status to R when you post a Billing payment (advancing the PAID_THRU) for a record with status N.
- Reinstated - iMIS sets the status to S when you change a nonmember record with status D and Name.STATUS other than S* (suspended), I* (inactive), or D* (deleted) to a customer record and when the Name.STATUS for a customer record changes from an S* (suspended), I* (inactive), or D* (deleted) code to one that is neither S*, I*, or D*. If you post a Billing payment for a record with status D, iMIS sets the status to S and removes any Name.STATUS code set to S* (suspended), I* (inactive), or D* (deleted).

Member Status Date

This is a display-only field that defaults to the current system date (or the Billing payment transaction date) for each of these status changes except when you enter a JOIN_DATE for a new record, in which case the JOIN_DATE is used.

Date Added

This is a display-only field that displays the date the customer was originally entered in the database.

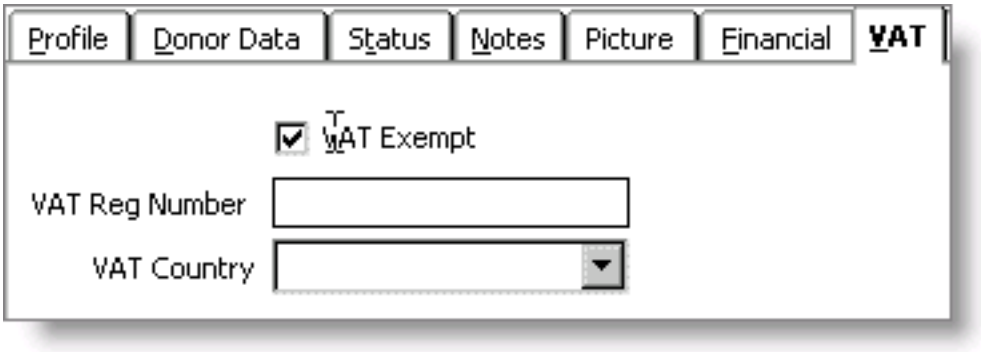
Last Update

This is a display-only field that displays the last date the customer's record was updated the database.

Last Updated By

This is a display-only field that displays the ID of the person who entered the update.

Manage customers window - VAT tab



From Customers, select Manage customers, find customer record, and select VAT tab

VAT Exempt

(optional) Enable if the customer is VAT exempt.

VAT Reg Number

(optional) This field specifies the VAT Registration Number for the customer. This information will display on the Full Order Entry window.

VAT Country

(optional) This field specifies the VAT country for the customer. This information will display on the Full Order Entry window.

Manage customers window - Solicitor Data tab

From Customers, select Manage customers, find customer record, and select Solicitor Data tab

Title

Specifies the solicitor's title.

Volunteer

Specifies whether the solicitor is a volunteer and not a paid staff member.

Solicitor

Specifies that the individual is a solicitor. When selected, solicitor information is available at gift/pledge entry and for reporting.

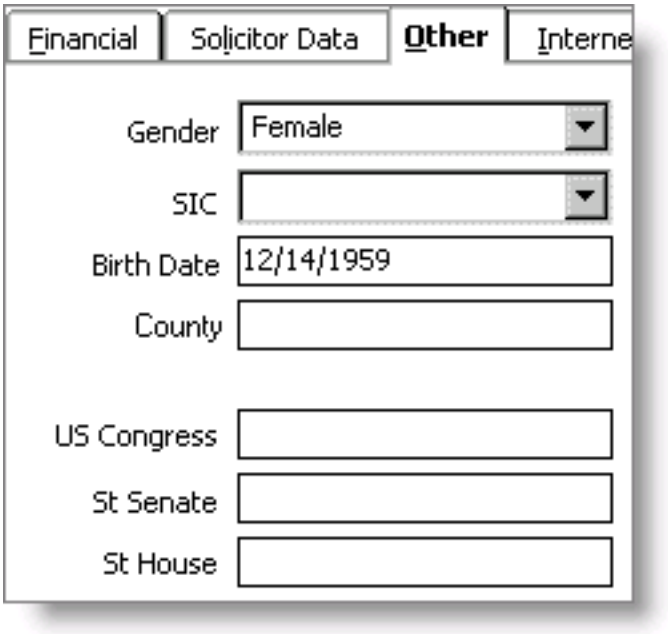
Hours/Week

Specifies the number of hours per week the solicitor works.

Comments

Contains comments associated with the solicitor. The character limit for this field is 255.

Manage customers window - Other tab



From Customers, select Manage customers, find customer record, and select Other tab

Gender

Specifies the gender of the customer.

Note: When possible, iMIS automatically populates this field based on the value in the Prefix field on the Customer Portfolio. Prefixes that do not indicate gender such as Dr., will not automatically populate.

SIC

Select the drop-down arrow on this field to select a SIC (Standard Industry Code). Values listed in this drop-down list are defined by your administrator. Codes entered before a SIC_CODE table is created will not be validated unless the field is edited.

Birth Date

Specifies the birth date of the customer.

County

Specifies the name or code for the county where the customer is located. iMIS auto-populates this field when the County from Primary Zip option is enabled by your administrator.

US Congress

Specifies the U.S. congressional district number for sending legislative alerts and target mailings.

St Senate

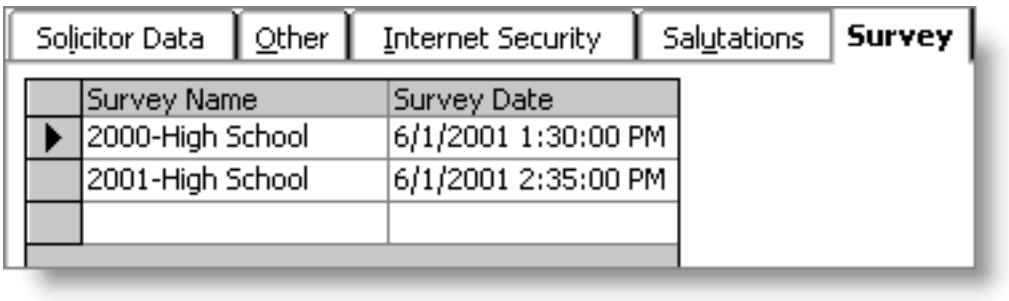
Specifies the state senatorial district number for legislative alerts and target mailings.

St House

Specifies the state representative district number for legislative alerts and target mailings.

Note: If you are using Accumail, the US Congress field, County field, and postal-related fields are auto-filled.

Manage customers window - User-defined tab



From Customers, select Manage customers, find customer record, and select user-defined tab

User-defined tabs can be displayed in the Detail area on the Customers tab. Multi-instance tabs are shown first, followed by single-instance tabs in the order they set up by your administrator.

User-defined tabs with values in Only applies to these types are shown as needed after you click Save and refresh the record.

Note: Your administrator can limit access to user-defined tabs.

Keyboard shortcuts in user-defined tabs

The following keyboard shortcuts are supported in user-defined tabs:

- Ctrl+V (Paste)
- Ctrl+C (Copy)
- Ctrl+Z (Undo)

Caution! Pressing Ctrl+Z in user-defined tabs does not zoom a text field as in other fields on the Customers area. Using Ctrl+Z in a user-defined tab will undo your most recent action.

The following are not supported in single-instance, user-defined tabs:

- Ctrl+C (Copy)
- Right-click menus

Only applies to these types

User-defined tabs can be defined to open for certain customer types. When this option is enabled and you are viewing a customer record, user-defined tabs will only be loaded for customers with those specific customer types. When editing a customer record, and updating the customer type from one that would not open a window, to one that would open a window, the window will only open after Save is clicked.

If a user-defined tab is set to only apply to certain customer types, the tab will not display in the detail area of a record when the record is inserted. The tab will only display after the record has been saved once, and then the user will need to reopen the tab to see all the tabs that the record should have.

Character entry

Character fields on single-instance, user-defined tabs display according to the character limit set for them by your administrator.

Fields on single-instance, user-defined tabs display according to the following:

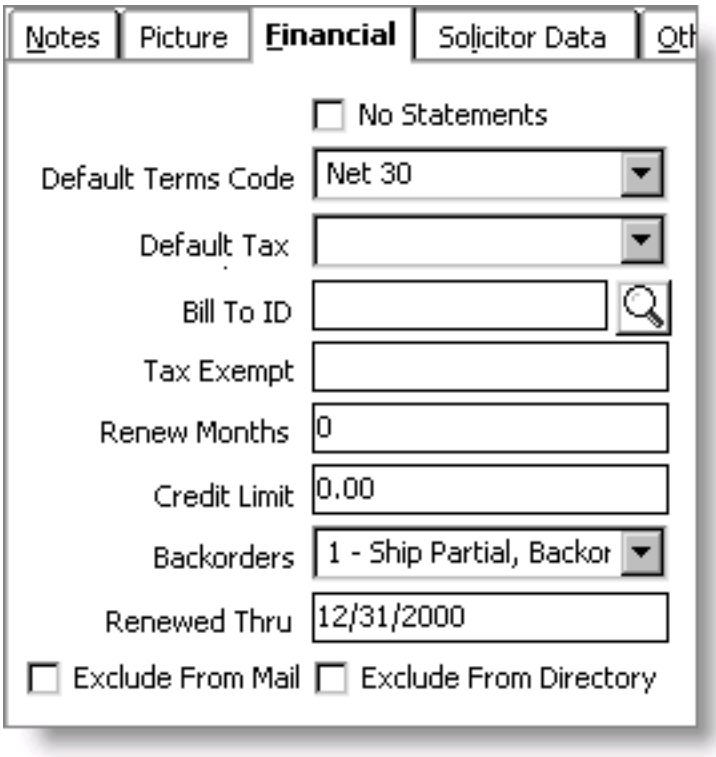
- Fields defined with a character limit of less than 33 characters display as a single line
- Fields defined with a character limit of 33 to 63 characters display as two lines
- Fields defined with a character limit of greater than 63 characters display as three lines
- Text fields specified with a character limit of more than 32 characters display with scroll bars to allow you to view the text

  Note: For field lengths greater than 32 characters, if you attempt to enter more characters than specified for a user-defined, single-instance tab, a message informs you that your text will be truncated. If you attempt to enter more characters than specified for a user-defined, multi-instance tab, a a message informs you of the maximum number of characters that can be entered in the field. The field will be blanked out and you will need to re-enter your value.

Entering financial information

Use the Financial tab to enter the customer's financial data preferences. Your administrator may limit access to the Financial tab.

Manage customers window - Financial tab



From Customers, select Manage customers, find customer record, and select Financial tab

No Statements

Enable if the customer will not receive statements.

Default Terms Code

Select the drop-down arrow on this field to select a default payment term for which the customer will pay invoices. Values that display on the drop-down list are defined by your administrator.

Default Tax

Select the drop-down arrow on this field to select a default tax authority. Values that display on the drop-down list are defined by your administrator.

Bill To ID

Specifies the ID number for the customer that will be handling charges as a third party. Used in Billing for List Billing.

Tax Exempt

Specifies any number to specify that this customer is tax exempt.

Renew Months

Use this field to override the normal billing period of 12 months. For example, if the customer is to be billed four times per year (quarterly), enter 3.

Credit Limit

Specifies the amount of credit assigned to the customer.

Backorders

Drop-down list of all backorder options used with Full Order Entry

Renewed Thru

Use this field to indicate the date through which the individual has been billed for the main Billing product, regardless of payment. This field is reset by iMIS when the main Customers Billing item is billed.

Exclude From Mail

Enable to exclude this customer from the Customers system mailings.

Exclude From Directory

Enable to exclude this customer from the directory.

To enter financial information

1. Open a customer's record in the Manage customers window.
2. Select the Financial tab and click in any field.
3. Tab to each field and enter the appropriate values.
4. Click Save, or continue entering additional detail information.

Entering note information

The Notes tab displays a scroll-down list that contains four notes. The first three Notes prompts are customized by your system administrator.

Note: Your administrator can customize notes to include more than four notes.

Manage customers window - Notes tab

From Customers, select Manage customers, find customer record, and select Notes tab

The fourth note displays a blank prompt, which will accept any value typed in the prompt (as long as the value is unique). As soon as you enter data in the last note field on the tab, the system automatically creates a new blank note below the last note.

The Notes tab can hold up to 70 notes.

To enter note information

1. Open a customer's record in the Manage customers window.
2. Select the Notes tab and click in any field.
3. Tab to each field and enter the appropriate values.
4. Click Save, or continue entering additional detail information.

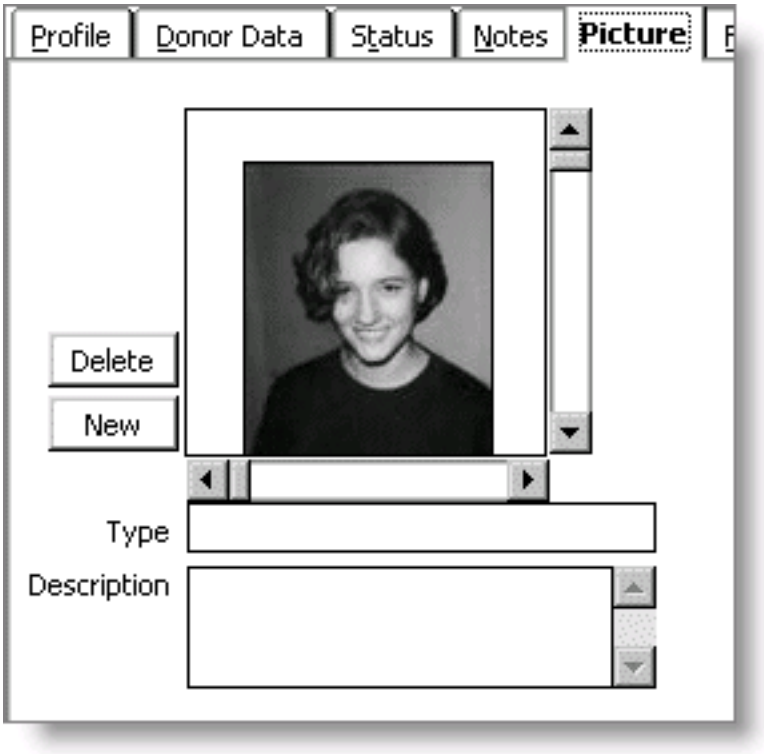
To view note information

To view the entire contents of a Note field in the Notes tab, click the Zoom button that corresponds to the Note field you want to view.

Adding a picture

Use the Picture tab to select and store a customer's picture.

Manage customers window - Picture tab



From Customers, select Manage customers, find customer record, and select Picture tab

Type

Specifies a title for the picture.

Description

Specifies a description for the picture.

To insert pictures

Images on the Manage customers window are limited to the BMP and JPEG formats. The preferred image size for the portrait is 130 pixels by 125 pixels. When a larger image is inserted, use the scroll bars to view the image.

1. Open a customer's record in the Manage customers window.
2. Select the Picture tab.
3. Click New to browse for the portrait file.

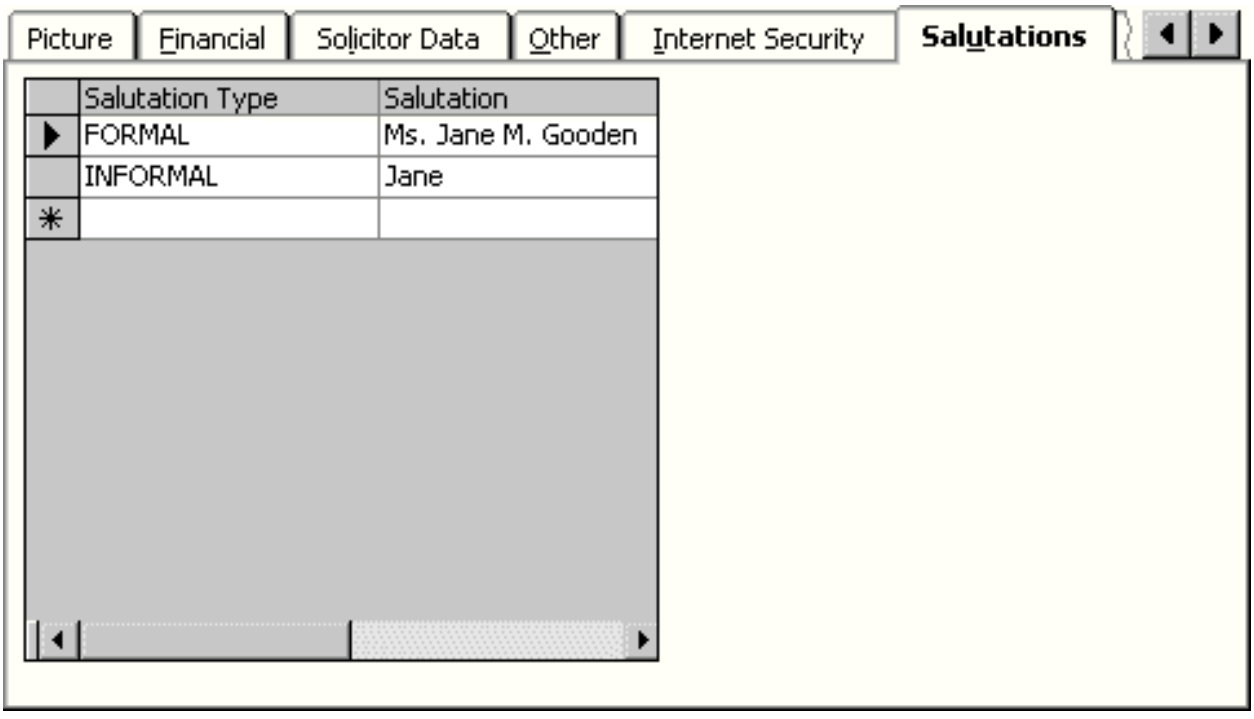
4. Select the file.
5. (optional) In the Type field, enter a value.
6. Tab to the Description field and enter a value.
7. Click Save, or continue entering additional detail information

   Note: When inserting a portrait that is larger than the viewing area, the portrait is centered after clicking Save.

Entering salutations information

Use the Salutations tab to define the salutation text used for customer correspondence and acknowledgements.

Salutations tab



From Customers, select Manage customers, find customer record, and select Salutations tab

Salutation Type

(required) Select the salutation code you want to use.

Select the right side of the Salutation Type cell to display a drop-down list of the descriptions defined for the salutation codes. Salutation codes are defined by your administrator.

Salutation

Specifies the salutation text for the corresponding Salutation Type. This field can automatically convert values entered to upper or lower case.

Note: Your administrator can limit your access to Salutations tab functionality.

To display the Salutations tab

The Salutations tab displays for all customer records if your administrator has defined salutation codes.

To assign a salutation code

1. Open a customer's record in the Manage customers window.
2. Select the Salutations tab.
3. Select the empty Salutation Type field to display a drop-down arrow.
4. Select the drop-down list and select the salutation code you want to use.
5. Enter salutation text in the Salutation field.
6. Click Save.

To edit a salutation code

When editing salutation codes, you can replace an existing code with one from the list of defined codes. However, you cannot replace an existing salutation code with a null value. No restrictions exist for editing salutation text, and you can leave the Salutation field blank if you want to remove the salutation text that has been assigned to a code.

1. Open a customer's record in the Manage customers window.
2. Select the Salutations tab.
3. Make any necessary changes.
4. Click Save.

To delete a salutation code

1. Open a customer's record in the Manage customers window.
2. Select the Salutations tab.
3. Select the row you want to delete and press the Delete key.
4. Click Save.

Historical Customer Data

You view comprehensive customer information in Customers. At times, however, you may need to access more specialized customer data. The history tabs offer a way to access detailed historical customer data.

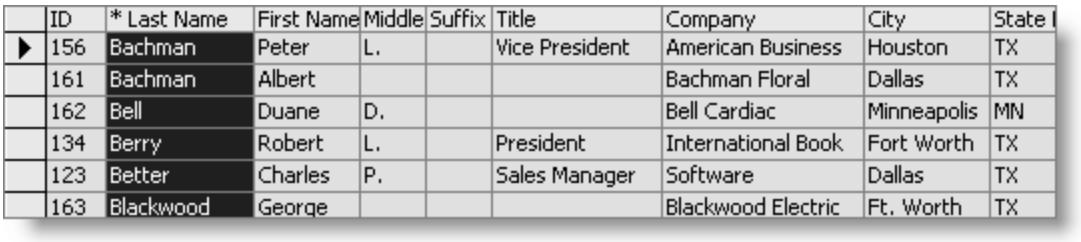
The exact tabs that are displayed, and the order in which they are displayed are configured in the Customer Portfolio Tab Preferences window (see "Creating tabs for activity types").

Sorting history tab data

You can sort records by any column in any of the history tabs on the Manage Customers window except Record History and Roster. Click the heading of the column by which you want to sort and the rows will be sorted according to the following rules:

varchar (alphanumeric)	alphabetic ascending	(A-Z) (1,10,2,20)
numeric	numeric ascending	(1 - 99)
date	chronological ascending	(1/1/2001 - 12/12/2005)
money	numeric ascending	(1.02 -99.99, 1,02 - 99,99)

Clicking on the column header of the sort column toggles the sort between ascending and descending order. The column by which the data is sorted is marked with an asterisk (*).



	ID	* Last Name	First Name	Middle	Suffix	Title	Company	City	State
▶	156	Bachman	Peter	L.		Vice President	American Business	Houston	TX
	161	Bachman	Albert				Bachman Floral	Dallas	TX
	162	Bell	Duane	D.			Bell Cardiac	Minneapolis	MN
	134	Berry	Robert	L.		President	International Book	Fort Worth	TX
	123	Better	Charles	P.		Sales Manager	Software	Dallas	TX
	163	Blackwood	George				Blackwood Electric	Ft. Worth	TX

Click the column header to sort by that column

Limitations:

- To protect data integrity, column sort is disabled when you edit data.
- This change does not affect the Record History and Roster tabs.

Note: The number of records returned for a customer is limited by the Find List Maximum configuration option in the Customer > Setup > Advanced window. Re-sorting tab data only sorts data that has already been retrieved, it will not retrieve any additional records that were excluded when using the default sort order.

Reviewing the History area

Enter, edit, and view customer information in the History area of the Manage customers window.

Manage customers window - History tabs

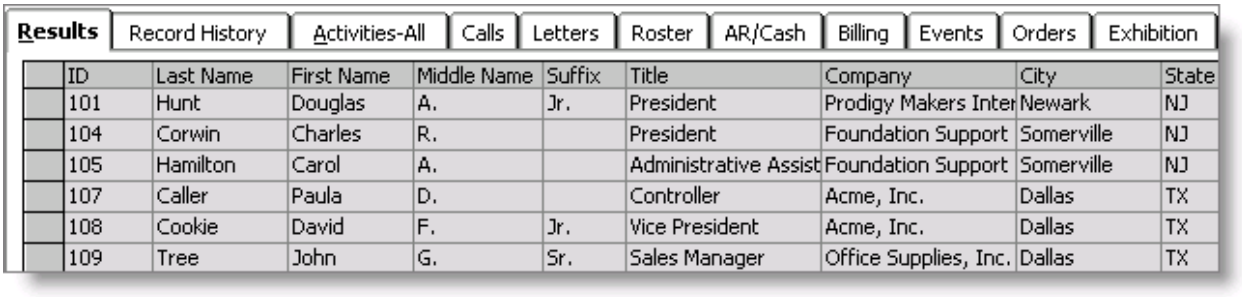
Depending on the tab configuration, the History area can contain the following tabs:

- Results (see "Manage customers window - Results tab")
- Record History (see "Manage customers window - Record History tab")
- Activities-All (see "Managing activity records")
- Calls (see "Manage customers window - Calls tab")
- Letters (see "Manage customers window - Letters tab")
- Roster (see "Manage customers window - Roster tab")
- AR/Cash (see "Manage customers window - AR/Cash tab")
- Billing (see "Manage customers window - Billing tab")

- Events (see "Manage customers window - Events tab")
- Orders (see "Manage customers window - Orders tab")
- Exhibition (see "Manage customers window - Exhibition tab")
- Exposition (see "Manage customers window - Exposition tab")
- Certification (see "Manage customers window - Certification tab")
- Label Preferences (see "Manage customers window - Label Preferences tab")
- Change Log (see "Manage customers window - Change Log tab")
- Relationships (see "Manage customers window - Relationships tab|topic=Managing relationships activity records)
- Fundraising
- Matching Plans (see "Manage customers window - Matching Plans tab")
- Notification (see "Manage customers window - Notification tab")
- Role (see "Manage customers window - Role tab")

Activity tabs created by your iMIS administrator can also be displayed in the History area.

You can add new records if the data grid is white.



ID	Last Name	First Name	Middle Name	Suffix	Title	Company	City	State
101	Hunt	Douglas	A.	Jr.	President	Prodigy Makers Inter	Newark	NJ
104	Corwin	Charles	R.		President	Foundation Support	Somerville	NJ
105	Hamilton	Carol	A.		Administrative Assist	Foundation Support	Somerville	NJ
107	Caller	Paula	D.		Controller	Acme, Inc.	Dallas	TX
108	Cookie	David	F.	Jr.	Vice President	Acme, Inc.	Dallas	TX
109	Tree	John	G.	Sr.	Sales Manager	Office Supplies, Inc.	Dallas	TX

From Customers, select Manage customers, and find customer record

To navigate within the history tabs

You can right-click on any history tab or from customers or companies listed in the Results, Record History, or Roster tabs to display a menu of available tabs (disabled tabs and the current tab are grayed out and cannot be selected). Selecting a tab from the list opens that tab.

The activity and module specific tabs, for example Fundraising and Calls, always display information about the record currently loaded in Customers > Manage customers.

To manually insert an activity record

See the specific tab areas for detailed instructions on entering activities.

Note: Your administrator can limit edit access to specific tabs.

1. Open a customer's record in the Manage customers window.
2. Select the Activities-All tab in the History section of the Manage customers window.
3. Select the drop-down list located directly below the Sort by area, and select the activity type you want to insert.
4. Enter the activity information in each cell.

   Note: Data entry can only be made in fields with a white background containing an * (asterisk) to the left of the field.
5. Press Tab to continue entering data in additional cells.
6. Click Save.

   Note: When entering activity records, the Date field is automatically populated with the system date. If only the Date field contains data when you save the record, the record will be assumed empty and will not be saved. However, if the activity record contains other data, the activity record will be saved.

   To expand a field

   You can press Ctrl+Z to enlarge (zoom) any field in the History section that can store 255 or more characters (such as in the Activities-All and Calls tabs). If the field is read-only, the enlarged field is also read-only. You can return to the normal view by clicking Cancel

or by using the “X” in the upper-right corner of the window. If the field is editable, when you are finished editing the text, you can return to the normal view by clicking OK.

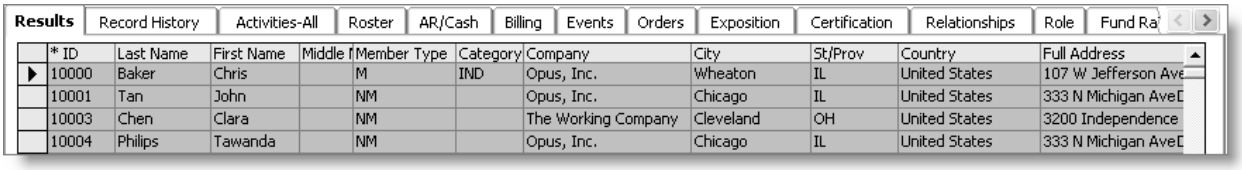
Note: If you want to enter multiple paragraphs in a field (separate text with a hard return), you must press Ctrl+Z.

Viewing results

The Results tab lists the records returned when you perform a search from the Search window.

Note: The columns that are shown in the Results tab can be specified by your system administrator.

Manage customers window - Results tab



From Customers, select Manage customers, click Find and perform a search

Viewing record history

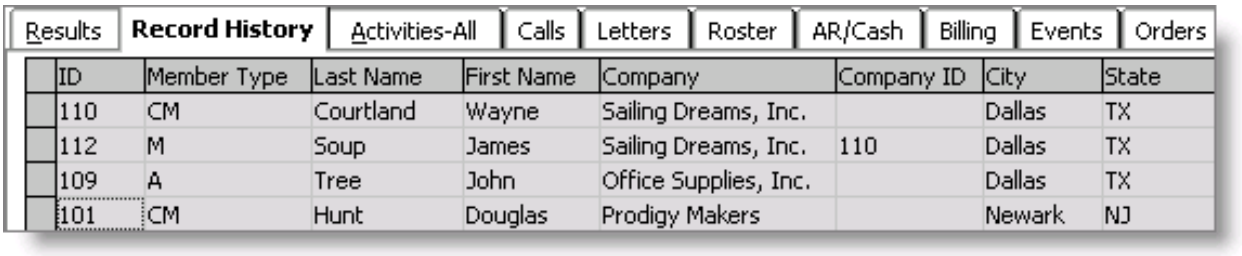
The Record History tab lists the customer records opened during the current session of the Manage customers window and enables you to quickly re-open any of the listed records without performing another search.

The most recently opened records are listed in the top row of the Record History tab, and records are listed only once in the tab regardless of the number of times they have been opened. If a record's information is updated, the changes will not be reflected in the Record History tab during the current session.

When you first open a customer's record in the Manage customers window, a row is added to the top of the Record History tab listing the customer's ID, Member Type, Last Name, First Name, Company, Company ID, City, and State. The fields you see on the Record History tab can be customized by your administrator.

Manage customers window - Record History tab

Record History tab data cannot be sorted because, unlike other history tabs, the data is meant to be viewed only in chronological order. The tab shows all of the records that you have edited, in most to least recent order, during your current iMIS session.



ID	Member Type	Last Name	First Name	Company	Company ID	City	State
110	CM	Courtland	Wayne	Sailing Dreams, Inc.		Dallas	TX
112	M	Soup	James	Sailing Dreams, Inc.	110	Dallas	TX
109	A	Tree	John	Office Supplies, Inc.		Dallas	TX
101	CM	Hunt	Douglas	Prodigy Makers		Newark	NJ

From Customers, select Manage customers and select Record History tab

The Record History tab cannot be sorted because, unlike other history tabs, the order of the data is meant to be viewed only in chronological order.

To open a record from the Record History tab

You can open a customer record from the Record History tab in the current window or in a new window.

1. Select a cell in the row of a customer record.
2. Open the record.

- To open in the current window, double-click on the record.
- To open in a new window, right-click the record and select Open in New Window.

Managing call activities

The Calls tab enables you to view all call activity records for a customer.
The following fields display on the Calls tab: Date, Attachments(s), Note, Follow Up, Assigned to, Follow Up Date, and Action(s).

Note: The fields that display on the Calls tab depend on the settings your administrator defines.

Manage customers window - Calls tab

From Customers, select Manage customers, find customer record, and select Calls tab

To enter a call activity

To insert new call activities, you must have a Customers authorization level of three (3) or greater.

1. Open a customer's record in the Manage customers window.
2. Select the Calls tab.
3. Select the Date field to the right of the * and enter the date for the Call activity.
4. Press Tab to continue entering data in additional cells.

- Continue to press Tab past the last cell to enter another activity; or
- Click Save.

To view a call activity

1. Open a customer's record in the Manage customers window.
2. Select the Calls tab.
3. Double-click the gray box to the left of the Date field to open the Activity Detail window for the call activity.

To edit a call activity

1. Open a customer's record in the Manage customers window.
2. Select the Calls tab.
3. Edit the call activity by selecting one of the following options:

- Double-click the gray box to the left of the date to open the Activity Detail window, click Edit, and then update the activity as needed. Click Save on the Activity Detail window; or
- Select the cell to edit, enter the appropriate data, and Tab to continue entering data in additional cells for this call activity; or
- Select a new activity to edit; or
- Click Save.

  Once the call activity is updated in the Manage customers window, you can select the box to the left of the date to view the changes on the Activity Detail window.

  To delete a call activity

  You can delete a call activity record that displays on the Calls tab provided your administrator has assigned you the appropriate permissions.

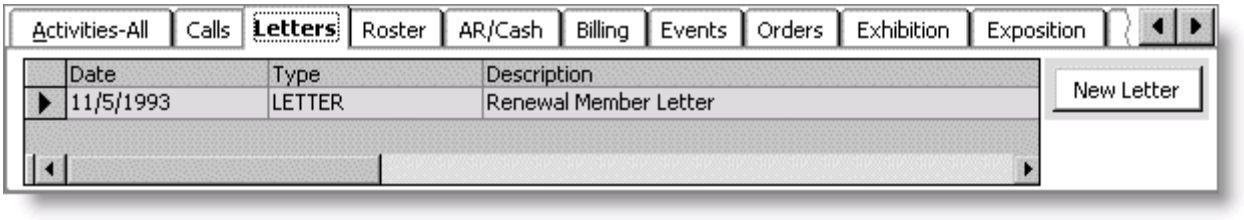
1. From Customers, select Manage customers.
2. Find a customer's record.
3. Select the Calls tab.
4. Select the call activity record you want to delete.
5. Press the Delete key on the keyboard.
6. Click Save.

   Note: If you select the Calls tab and it does not contain any records, pressing the Delete key will have no effect.

Managing letter activities

The Letters tab enables you to view all letter activity records for a customer. The following fields display on the Letters tab: Date, Type, and Description.

Manage customers window - Letters tab



From Customers, select Manage customers, find customer record, and select Letters tab

New Letter

Opens the Membership Standard Letters window when Microsoft Word (MS Word) is installed on the workstation. The QuickLetter system will be used if MS Word is not installed on the workstation.

To enter a letter activity

1. Open a customer's record in the Manage customers window.
2. Select the Letters tab.
3. Click New Letter to open the Membership Standard Letters window.

   Note: When you click New Letter, the MS Word Letter Integration (Letter System) will launch if it is installed. If it is not installed, then the standard QuickLetter will launch. For more information, see Creating Letters.

To view a letter activity

Note: Once a template is saved, all future letter activities will use the original template, regardless if the template is changed.

1. Open a customer's record in the Manage customers window.
2. Select the Letters tab.
3. Double-click the gray box to the left of the Date field to open the Activity Detail window for the letter activity.

To edit a letter activity

1. Open a customer's record in the Manage customers window.
2. Select the Letters tab.
3. Double-click the gray box to the left of the Date field to open the Activity Detail window.
4. Click Edit, and then update the activity as needed.
5. Click Save on the Activity Detail window.

To delete a letter activity

You can delete letter activity records that display on the Letters tab provided your administrator has assigned you the appropriate permissions.

1. From Customers, select Manage customers.
2. Find a customer's record.
3. Select the letter activity record you want to delete.
4. Press Delete on the keyboard.
5. Click Save.

Note: If you select the Letters tab and it does not contain any records, pressing Delete will have no effect.

Viewing company rosters

Company rosters in iMIS Desktop

On the Customers feature, the Roster tab enables you to view a list of customer records associated with a particular company record.

The Roster tab lists the company that is specified in the current record's Company field and all member records that list that same company in their Company fields. The list is shown in a tree configuration, so that subsidiary companies and their associated members are kept as a unit in the list. A status line at the bottom of the tab displays how many records are currently displayed as you expand and collapse the tree.

Special cases:

- If the current record is not associated with a company, iMIS lists only the current record.
- If the current record is a company record and the company is not a subsidiary of another company, then iMIS shows the roster of the current company.
- If the current record is a company record that is a subsidiary of another company, iMIS shows the parent company's roster, with the current company highlighted.

  Double-clicking any of the listed items (either a company or a member) highlights that line and loads its record in Customers > Manage customers. The item remains highlighted in the roster until another record is loaded from the Roster tab or from another location.

  Note: Your system administrator can specify the fields that are displayed in the Roster tab (see "Customizing roster display fields") and can also specify the display name of the Roster tab (see "Customer Setup - Basic Options window").

  Note: The Roster does not reflect changes you make to a record until you load a different roster and then reload the previous roster.

  Note: The Roster tab, like all of the history tabs, is not active until a record has been loaded in Customers > Manage customers.

Manage customers window - Roster tab

Select Customers > Manage customers, find a customer record, and click the Roster tab

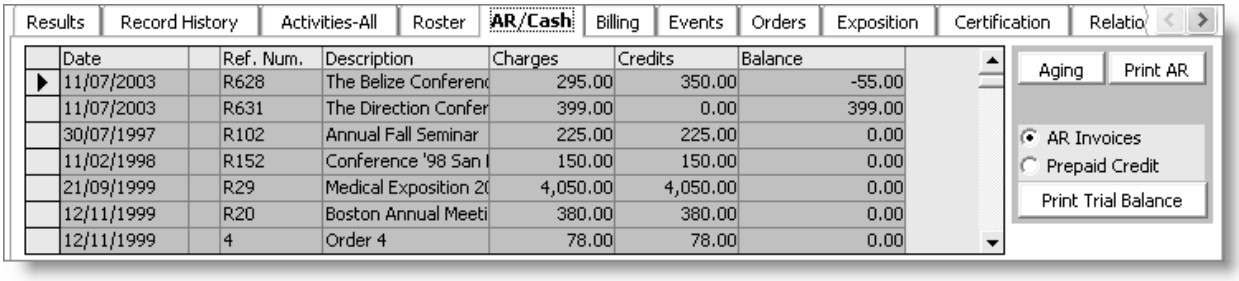
Note: You can also view a company roster in the Public view under My Account if your user record has the Company Administrator role assigned.

Viewing AR/Cash activity records

The AR/Cash tab enables you to view the Transaction Ledger(s) for the customer. The following fields are displayed on the AR/Cash tab: Date, Ref Num, Description, Charges,

Credits, and Balance. The information on the AR/Cash tab is view-only.

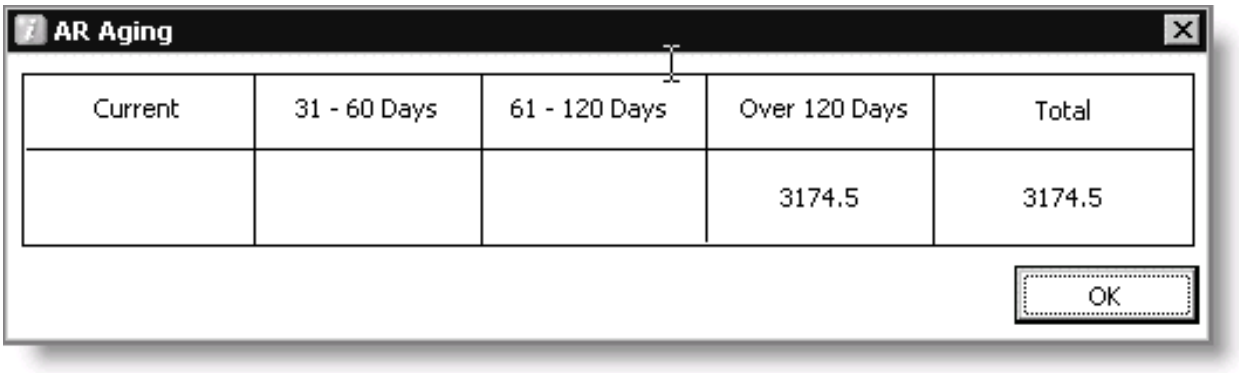
Manage customers window - AR/Cash tab



From Customers, select Manage customers, find customer record, and select AR/Cash tab

Aging

Opens the AR Aging window. The Current, 31-60 Days, 61-120 Days, and Over 120 Days columns are auto-generated from the AR/Cash module. The Total column shows the total invoice balance for the current Customer or Company ID.



Print AR

Generates and prints the Statement of Account for the current customer record to your selected print destination.

AR Invoices

Filters the transactions to only show invoices. You can prevent users from viewing Fundraising invoices on the AR/Cash tab by entering a Fundraising access keyword in the

Fundraising History View field on the Customer Setup – Access Keys window (from Customers, select Set up module > General, and click Access Keys).

Prepaid Credit

Filters the transactions to only show prepaid credits.

Print Trial Balance

Prints the Accounts Receivable Trial Balance Statement for the current customer record to your selected print destination.

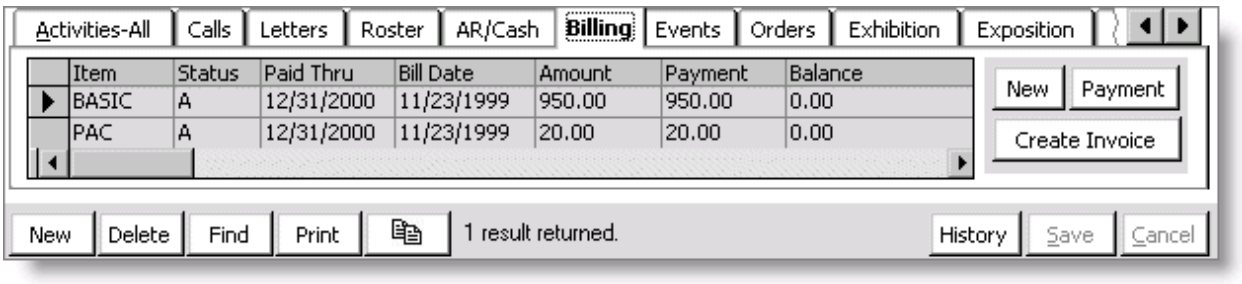
To view an AR/Cash activity

1. From Customers, select Manage customers.
2. Click Find and load a customer's record.
3. Select the AR/Cash tab.
4. Double-click the gray box to the left of the Date field to open the Transaction Ledger.
5. Review the transactions, and then click OK.
6. Click Aging on the AR/Cash tab to open the AR Aging window.
7. Review the information on the AR Aging window, and click OK.

Viewing billing items

The Billing tab enables you to view or enter Dues/Subscription Item Detail(s) for the customer. The following fields display on the Billing tab: Item, Member Type, Status, Paid Thru, Bill Date, Amount, Payment, Payment Method, and Balance.

Manage customers window - Billing tab



From Customers, select Manage customers, find customer record, and select Billing tab

Payment

Opens the Dues/Subscription Payments by Individual window for this customer record.

Create Invoice

Opens the Dues Billing Selections window where you can generate initial and renewal notices, produce bills for a large group of customers or subscribers, and process bills for groups that meet more specific selection criteria.

History/Current

Toggles between the current and history view of billing activities for this customer.

To view a billing item

1. Open a customer's record in the Manage customers window.
2. Select the Billing tab.
3. Select the gray box to the left of the Date field to open the Dues/Subscription Item Detail window for the billing item.
4. Review the information on the Dues/Subscription Item Detail window and then click OK.

To delete a billing record

You can delete billing records that display on the Billing tab, provided your administrator has assigned you the appropriate permissions.

Note: Accrual dues subscription records with a non-zero balance cannot be deleted from the Billing tab.

1. From Customers, select Manage customers.
2. Find a customer's record.
3. Select the Billing tab.

4. Select the record you want to delete.
5. Press Delete on the keyboard. A message displays asking you to confirm the deletion:

- Click Yes to have the record deleted from the tab and the database; or
- Click No to cancel the deletion.

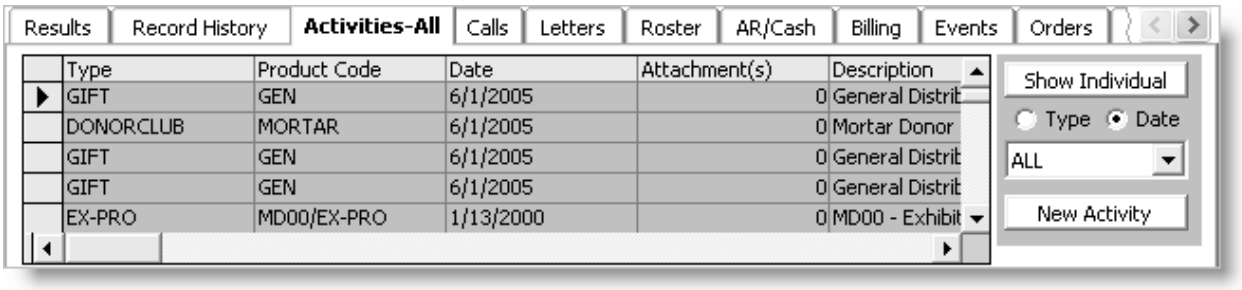
Note: If no record in the Billing tab has the focus, pressing Delete will have no effect.

Managing activity records

The Activities-All tab enables you to enter, edit, and view activity records for a customer record. The following fields display on the Activities-All tab: Type, Product Code, Date, Description, Note, Thru Date, Amount, Units, and Attachment(s).

Note: Your administrator can limit access to Activities-All tab functionality.

Manage customers window - Activities-All tab



From Customers, select Manage customers, find customer record, and select Activities-All tab

Show Individual

Toggles between viewing activities at the individual and company employee level, or the company level.

Note: When viewing an individual customer type record, the product does not display the Show Individual button.

Type

When selected, sorts activities alphabetically by type.

Date

When selected, activities by date.

Activity list

Specifies the activity type by which the list will be filtered.

New Activity

Opens the Activity Detail window so that you can enter an activity.

To enter an activity from the Activities-All tab

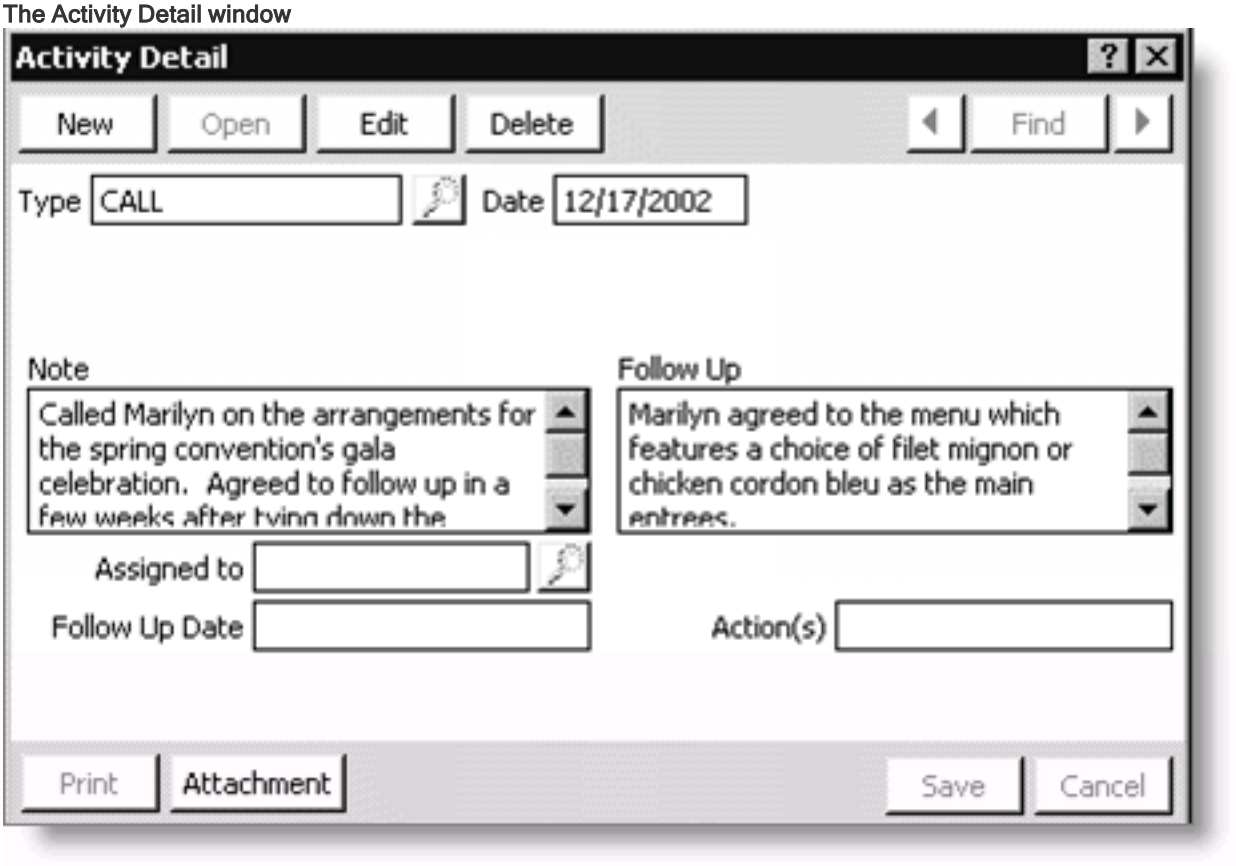
Note: Your administrator can limit access to Activities-All tab functionality. To enter and edit activities, the Customers authorization level needs to be set to three (3) or greater. To delete activities, the Customers authorization level needs to be set to four (4) or greater.

1. Open a customer's record in the Manage customers window.
2. Select the Activities-All tab.
3. Click New Activity.

   The Activity Detail window appears.
4. Click New and select an activity Type that allows user edits.

   Note: You cannot enter new system-generated activity types. You cannot enter user-defined activity types unless they have the Allow user Edit checkbox selected on the Set Up Activity Types window.
5. Enter values according to the fields that display.
6. Click Save.

The Activity Detail window



The Activity Detail window

To view all activities

1. Open a customer's record in the Manage customers window.
2. Select the Activities-All tab.
3. Double-click the gray box to the left of the Type field to open the Activity Detail window for the activity.

To edit an activity from the Activities-All tab

Note: Your administrator can limit access to Activities-All tab functionality. To enter and edit activities, the Customers authorization level needs to be set to three (3) or greater. To delete activities, the Customers authorization level needs to be set to four (4) or greater.

1. Open a customer's record in the Manage customers window.

2. Select the Activities-All tab.
3. Double-click the gray box to the left of the Type field to open the Activity Detail window.
4. Click Edit, and then update the activity as needed.
5. Click Save on the Activity Detail window.

To delete an activity from the Activities-All tab

Note: You can delete activity records provided your administrator has assigned you the appropriate permissions. If you attempt to delete an activity record and you do not meet the requirements to delete an activity, a message displays informing you that you either do not have sufficient privileges or the activity type cannot be deleted. If you have a Customers authorization level of 2 or less, the Activities-All tab is read-only-only and a message is displayed if you attempt to delete an activity record.

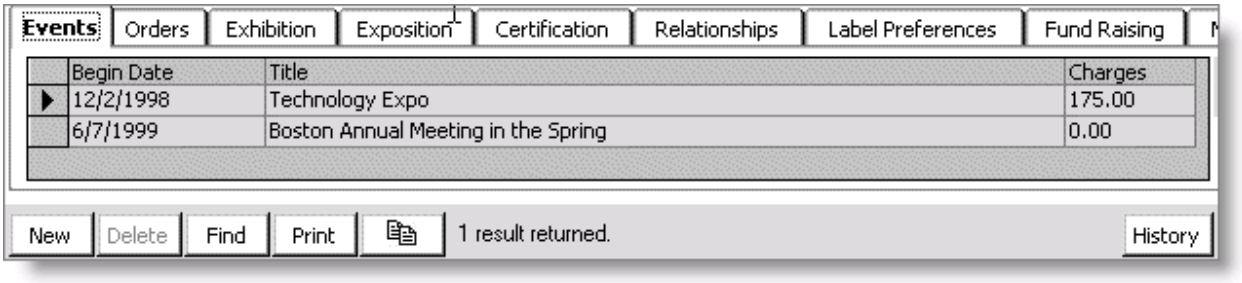
1. Open a customer's record in the Manage customers window.
2. Select the Activities-All tab.
3. Select the type of activity record you want to delete from the activity Type drop-down list.
4. Select the activity record you want to delete.
5. Press Delete on your keyboard.
6. Click Save.

Note: If no record on the Activities-All tab has the focus, pressing Delete has no effect.

Viewing event registrations and activities

The Events tab enables you to view Event registrations for the customer. The following fields display on the Events tab: Begin Date, Title, and Charges.

Manage customers window - Events tab



From Customers, select Manage customers, find customer record, and select Events tab

Registration

Opens the Register a customer window. When you click New on the Register a customer window, the system automatically populates the ID field with the customer's ID.

History

Used to toggle between the current and history view of event activities for this customer record.

To view an event registration

1. Open a customer's record in the Manage customers window.
2. Select the Events tab.
3. Select the gray box to the left of the Begin Date field to open the Event's module Register a customer window.
4. Review the information on the Register a customer window, and close the window.

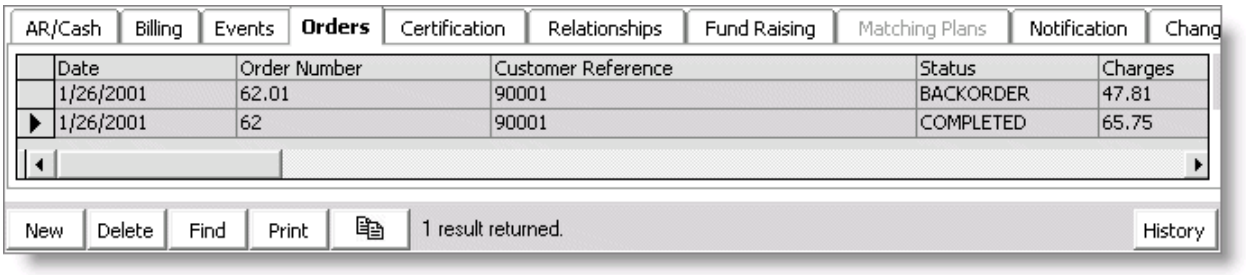
To view an event activity record

1. Open a customer's record in the Manage customers window.
2. Select the Events tab.
3. Click History to view the event activity records for the customer.
4. Double-click the gray box to the left of the Transaction Date field to open the Activity Detail window for the event activity.

Viewing orders and order activities

The Orders tab enables you to view open and complete orders for the customer. The following columns are displayed on the Orders tab: Date, Order Number, Customer Reference, Status, and Charges.

Manage customers window - Orders tab



From Customers, select Manage customers, find customer record, and select Orders tab

New Order

Opens the Enter and edit orders window. When you click New on the Enter and edit orders window, the system automatically populates the Bill to ID and Tax Authority fields on the Overview tab and the information on the Ship to Info tab with the customer's information.

History

Used to toggle between viewing current and historical order activities for this customer record. In Current view, all open orders display at the top of the grid with all completed orders at the bottom. Within each group of orders (open and completed), the orders sort by date and then by order number in descending order (so the newest orders display at the top of the grid).

To view orders

1. Open a customer's record in the Manage customers window.
2. Select the Orders tab.
3. Double-click the gray box to the left of the Date field to open the Order Entry window.
4. Review the information on the Order Entry window, and close the window.

To view an order activity record

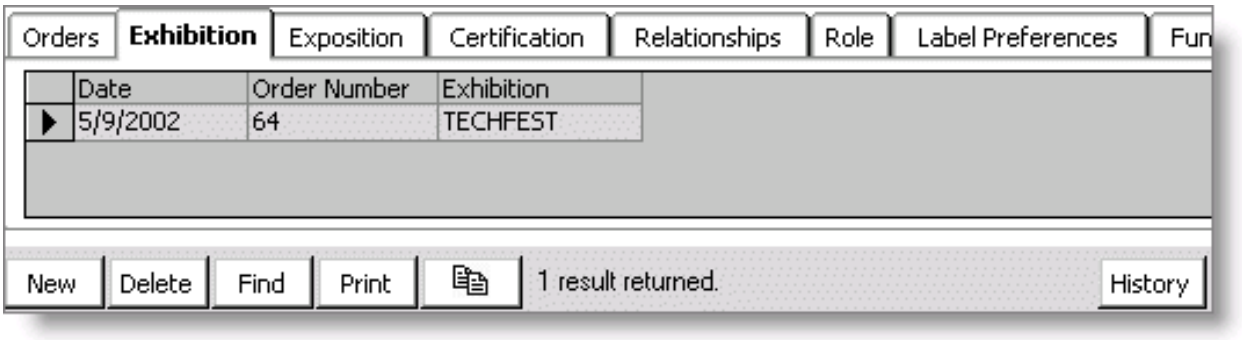
1. Select the Orders tab.
2. Click History to view the order activity records for the customer.
3. Double-click the gray box to the left of the Transaction Date field to open the Activity Detail window for the order activity.

Viewing exhibition registrations and activities

The Exhibition tab enables you to view Exhibition orders for the customer

The following fields display on the Exhibition tab: Date, Order Number, and Exhibition.

Manage customers window - Exhibition tab



From Customers, select Manage customers, find customer record, and select Exhibition tab

History

Used to toggle between the current and history view of exhibition activities for this customer record.

To view an exhibition registration

1. Open a customer's record in the Manage customers window.
2. Select the Exhibition tab.
3. Double-click the gray box to the left of the Date field to open the Exhibition module's Process orders window.
4. Review the information on the Process orders window, and close the window.

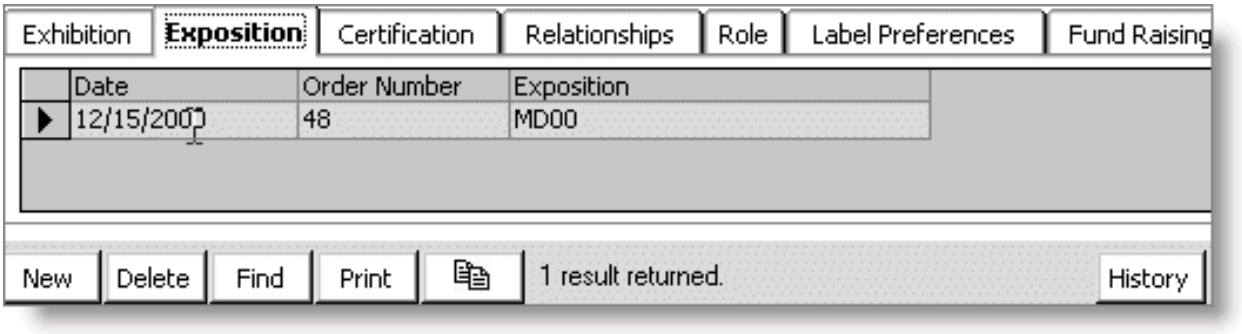
To view an exhibition activity record

1. Open a customer's record in the Manage customers window.
2. Select the Exhibition tab.
3. Click History to view the exhibition activity records for the customer.
4. Double-click the gray box to the left of the Source Code field to open the Activity Detail window for the exhibition activity.

Viewing exposition activities

The Exposition tab enables you to view or enter exposition orders for the customer. The following fields display on the Exposition tab: Date, Order Number, and Exposition. The Exposition tab does not allow editing or inserting of information.

Manage customers window - Exposition tab



From Customers, select Manage customers, find customer record, and select Exposition tab

History

Used to toggle between the current and history view of exposition activities for this customer record.

To view an exposition registration

1. Open a customer's record in the Manage customers window.

2. Select the Exposition tab.
3. Double-click the gray box to the left of the Date field to open the Exposition module's Process booth orders window.
4. Review the information on the Process booth orders window, and close the window.

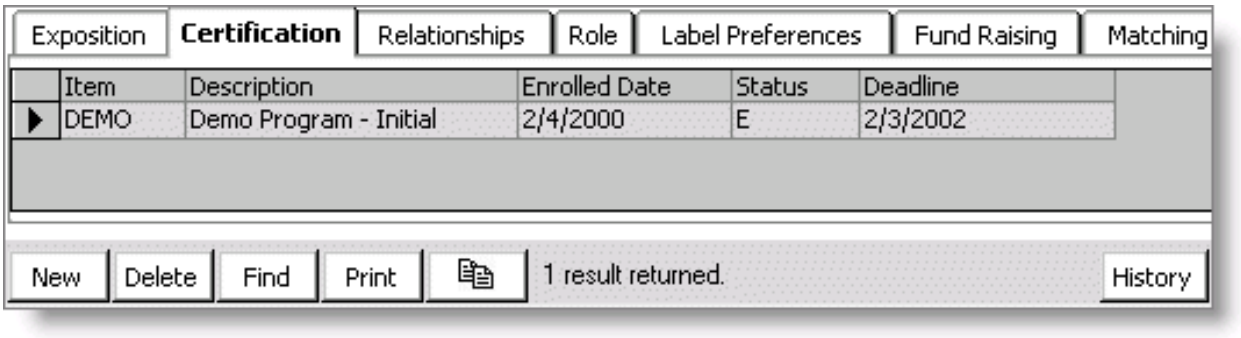
To view an exposition activity record

1. Open a customer's record in the Manage customers window.
2. Select the Exposition tab.
3. Click History to view the exhibition activity record for the customer.
4. Double-click the gray box to the left of the Source field to open the Activity Detail window for the exposition activity.

Viewing certification activities

The Certification tab enables you to view certification orders for the customer. The following fields display on the Certification tab: Item, Description, Enrolled Date, Status, and Deadline.

Manage customers window - Certification tab



From Customers, select Manage customers, find customer record, and select Certification tab

History

Used to toggle between the current and history view of certification activities for this customer record.

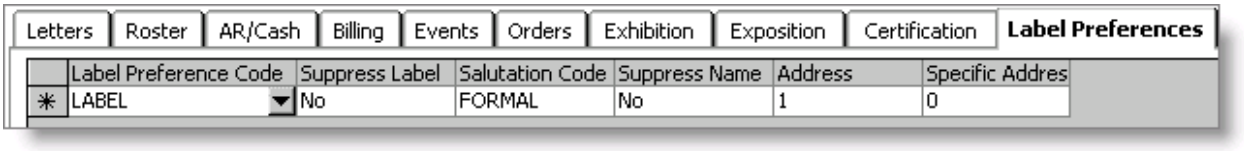
To view certification activities

1. Open a customer's record in the Manage customers window.
2. Select the Certification tab.

Managing label preferences

The Label Preferences tab enables you to select the salutation text, addresses, and options used when printing labels.

Manage customers window - Label Preferences tab



From Customers, select Manage customers, find customer record, and select Label Preferences tab

Label Preference Code

(required) Specifies a product label preference code. Select the right side of the cell to display a drop-down list of defined codes. These codes are defined by your administrator.

Suppress Label

Enable to suppress printing the label. Select the right side of the cell to display a drop-down list and select Yes or No.

Salutation Code

Specifies the code for the salutation text you want to print on the label. This field is enabled if salutation text has been defined for at least one salutation code. It will be read-only if no salutation text has been defined. Select the right side of the cell to display a drop-down list of defined codes.

Suppress Name

Enable to suppress printing the customer's name on the label. Select the right side of the cell to display a drop-down list and select Yes or No.

Address

(required) Select the address that will print on the label:

- Preferred Mailing Address - Select this address to print the customer's preferred mailing address.
- Preferred Billing Address - Select this address to print the customer's preferred billing address.
- Specific Address - Select this address if you want a specific address to print on a label. Selecting Specific Address enables the cell under the Specific Address column for the given row.

  Select the right side of the cell to display a drop-down list of addresses.

  Specific Address

  Select the specific address that will print on the label. Select the right side of the cell to display a drop-down list of specific addresses.

  To display the Label Preferences tab

  Label Preferences functionality is not applicable for customers that have no address data, and the Label Preferences tab is disabled for customer records that do not have a defined address. The tab enables once you save an address to the database for the customer. The Label Preferences tab is disabled (read-only) when the Manage customers window is in the data entry mode.

  The Label Preferences tab displays only after meeting label preferences have been set up by your administrator.

  To enter a label preference

1. Open a customer's record in the Manage customers window.
2. Select the Label Preferences tab.
3. Select the empty Label Preference Code field to display a drop-down arrow.
4. Select the drop-down list and select the label preference code you want to use.

5. Tab to the Suppress Label field and select Yes or No from the drop-down list.
6. Tab to the Salutation Code field and select the salutation code for the salutation text that you want to print on the label.

   Note: Salutation text is defined for salutation codes on the Salutations tab, and the Salutation Code field enables only if salutation text has been defined for at least one salutation code. If no salutation text has been defined, the Salutation Code field will be read-only.
7. Tab to the Suppress Name field and select Yes or No from the drop-down list.
8. Tab to the Address field and select the address that you want to print on the label. For example, select Specific Address if you want to use an address other than the Preferred Mail or Preferred Bill address. If you select Specific Address, the Specific Address field will enable.
9. (Required only if Specific Address is selected in the Address field) Tab to the Specific Address field and select the Specific Address that you want to print on the label. The addresses listed include all of the customer's defined addresses.
10. Click Save.

To edit a label preference

1. Open a customer's record in the Manage customers window.
2. Select the Label Preferences tab.
3. Make any necessary changes.
4. Click Save.

To delete a label preference

1. Open a customer's record in the Manage customers window.
2. Select the Label Preferences tab.
3. Select the row you want to delete and press Delete on your keyboard.
4. Click Save.

Viewing change log activity records

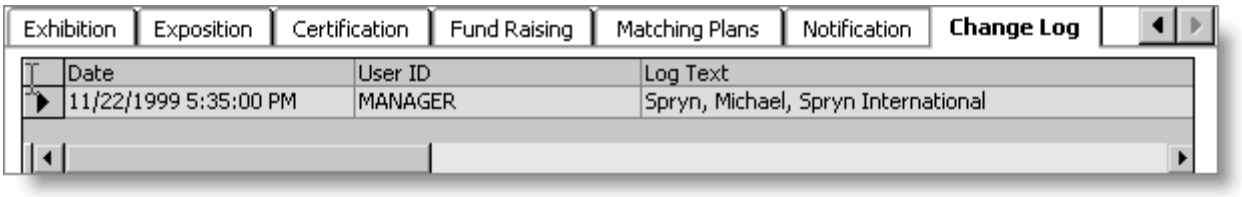
The Change Log tab enables you to view changes that have been made to a customer record. The following fields are shown on the Change Log tab:

- Date - the date the change was made
- User ID - the login ID of the person who made the change
- Log Text - the change that was made

Note: You cannot edit Change Log entries.

The changes that are tracked can be configured by your iMIS administrator (see "Adding and deleting fields in the change log").

Manage customers window - Change Log tab



From Customers, select Manage customers, find customer record, and select Change Log tab

To view change log activity

1. Open a customers record in the Manage customers window.
2. Select the Change Log tab.
3. Use the scroll bar to move up and down the log.

Viewing fundraising information

You can view customer fundraising activities and history through the donor's customer record: select Customers > Manage customers > Fundraising tab.

The Fundraising tab shows summarized and detailed fundraising information and provides access to essential Fundraising features: entering new gifts, printing a fundraising profile, and managing requests. The Fundraising history tab has four sub-tabs:

- Summary
- Donor History
- Donor Recognition
- Requests

Note: The values in the Pledge Amount column reflect the net pledge amount, including credit and debit memos that have been applied to the pledge since its initiation. This also applies to meeting gifts and pledges.

Need more?

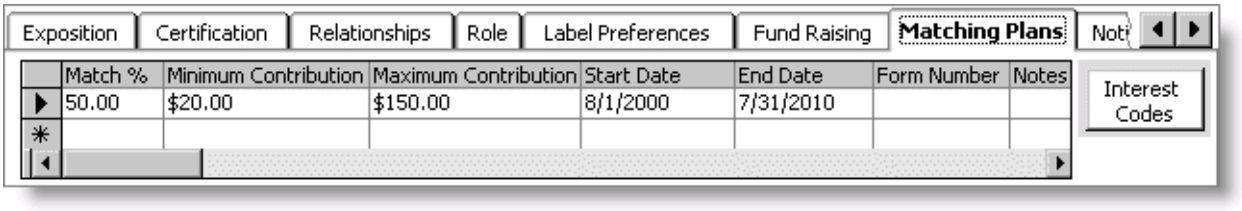
- For details about the Fundraising tab, see Customers Fundraising tab in the Fundraising section.
- For configuration help, see Customers: Set up fundraising.
- For more about granting access to the Fundraising tab, see About Fundraising tab access in the Fundraising section.

Managing matching plans information

Many companies have a matching plan through which they match the donations and pledges made by their company customers. The Matching Plans tab enables you to set up and create matching plans.

The Matching Plans tab is enabled if a customer's record is loaded into the Customers area and the customer type is Company Member (CM). If the customer type is other than CM, the tab disables. The Matching Plans tab is read-only for users not authorized to add, edit, and delete data, and iMIS must be licensed for Fundraising for the Matching Plans tab to display.

Manage customers window - Matching Plans tab



From Customers, select Manage customers, find customer record, and select Matching Plans tab

Match%

(required) Specifies the percentage of the company customer's contribution that the company will match. Numerals of 0.01 to 999.99 are acceptable.

Minimum Contribution

(required) Specifies the minimum monetary amount of the employee's contribution that the company will match.

Maximum Contribution

(required) Specifies the maximum monetary amount of the employee's contribution that the company will match.

Start Date

Specifies the starting date of the matching plan.

End Date

Specifies the ending date of the matching plan.

Form Number

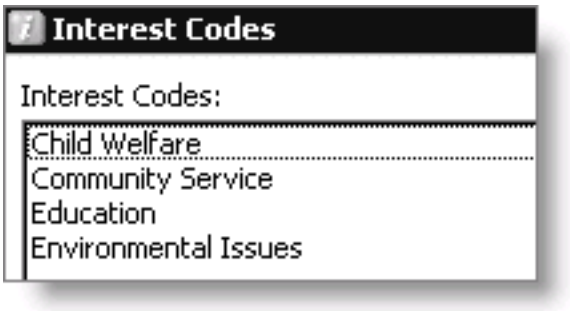
Specifies the matching plan's form number.

Notes

Specifies notes associated with the matching plan.

Interest Codes

Opens the Interest Codes window. The Interest codes window is used to apply a matching plan to a specific Interest Code. Interest Codes are defined by your administrator.



Sample Interest Codes window

Note: Your administrator can control access to the Matching Plans tab.

To create a matching plan

1. Open the record of the company member for whom you want to set up a matching plan.
2. Select the Matching Plans tab.
3. Set the focus on the empty row at the bottom of the data-grid.
4. (required) Enter the Match %. This is the percentage of the company member's contribution matched by the company.
5. (required) Enter the Minimum Contribution the company will match.
6. (required) Enter the Maximum Contribution the company will match.
7. Enter the Start Date of the matching plan.
8. Enter the End Date of the matching plan.
9. Enter the Form Number of the matching plan.
10. Enter any Notes associated with the matching plan.
11. Click Interest Codes to open the Interest codes window.
12. Select the interest code(s) for the matching plan (press Ctrl to select multiple codes).
13. Click OK on the Interest Codes window.
14. Click Save on the Manage customers window.

To edit a matching plan

1. Open the record of the company member for whom you have set up a matching plan.
2. Select the Matching Plan tab.
3. Set the focus on the matching plan you want to modify by selecting the box to the left of the row.
4. Make any necessary changes.
5. Click Save.

To delete interest codes from matching plans

1. Open the record of the company member for whom you have set up a matching plan.
2. Select the Matching Plan tab.
3. Set the focus on the matching plan for which you want to delete the interest code(s) by clicking the box to the left of the row.
4. Double-click to open the Interest Codes window.
5. While pressing Ctrl, click on the Interest Code(s) to deselect them.
6. Click OK on the Interest codes window.
7. Click Save on the Manage customers window.

To delete a matching plan

Note: The Delete button is enabled only if the Allow Delete from Customer Portfolio option is enabled by your administrator.

1. Open the record of the company member for whom you have set up a matching plan.
2. Select the Matching Plan tab.
3. Set the focus on the matching plan you want to delete by clicking the box to the left of the row.

4. Click Delete.
5. Click Save.

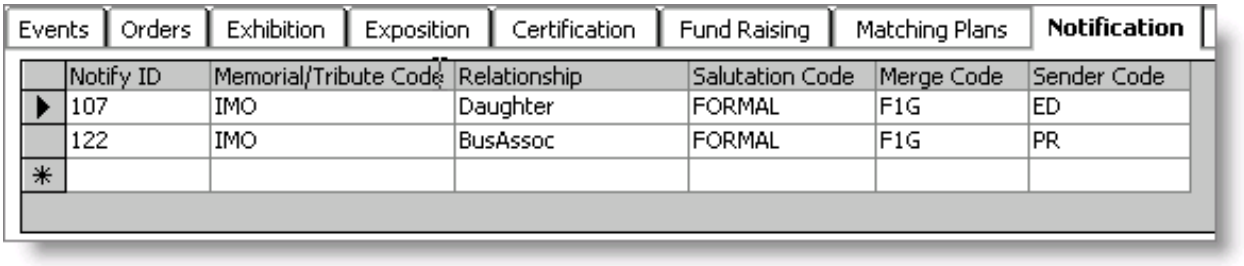
Note: Deleting a record from the Matching Plans tab deletes the corresponding Interest Code records as well.

Managing notification information

When memorial or tributary contributions are made for an individual, the recipient's family members and associates need to be notified of the contribution. The Notification tab enables you to add, edit, and delete notification information.

The Notification tab is read-only for users not authorized to add, edit, or delete data, and iMIS must be licensed for Fundraising for the Notification tab to display. It is enabled in edit mode and disabled in data entry mode.

Manage customers window - Notification tab



From Customers, select Manage customers, find customer record, and select Notification tab

Notify ID

(required) Displays the Notify IDs associated with this customer record. The Notify IDs are the IDs to be notified if a memorial or tribute donation is made in honor of this individual. You can enter a Notify ID or select a Notify ID from the drop-down list.

The Notify IDs that display for an ID in the Notification tab display in ID order. When you click Apply all Notify IDs on the Tribute tab of the Enter and edit gifts window, the Notify IDs defined for the specified Memorial ID display in alphabetical order.

Memorial/Tribute Code

Select the code for notifying an individual of the memorial or tributary contribution. Your administrator defines these codes. If no codes have been defined, the field is read-only. Select on the right side of the cell to display a drop-down list of the descriptions defined for the memorial/tribute codes. When you select a memorial/tribute code's description, the code will display in the field.

Relationship

Select the relationship code that describes the relationship between the notified individual and the individual being honored or recognized. Your administrator defines these codes. If no relationships have been defined, the Relationship field is read-only. Click on the right side of the cell to display a drop-down list of descriptions defined for the relationship codes. When you select a relationship code's description, the code displays in the field.

Salutation Code

Select the salutation code and corresponding salutation text used when notifying an individual of a memorial or tributary contribution. Select on the right side of the cell to display a drop-down list of descriptions defined for the salutation codes. When you select a salutation code's description, the code displays in the field. Your administrator defines these codes.

Merge Code

Select the merge code used when sending a notification. Select on the right side of the cell to display a drop-down list of descriptions defined for the merge codes. When you select a merge code's description, the code is displayed in the field. Your administrator defines these codes. If no merge codes have been defined, the Merge Code field is read-only.

Sender Code

Select the sender code used when sending a notification. Your administrator defines these codes. If no sender codes have been defined, the Sender Code field is read-only. Select on the right side of the cell to display a drop-down list of descriptions defined for

the sender codes. When you select a sender code's description, the code displays in the field.

Note: Your administrator can control access to the Notification tab. In order to modify the primary key (Notify ID field) or delete a row from the tab, a user must have an authorization level of 4 or higher. Users with an authorization level of 3 can enter new rows and edit the secondary keys (Memorial/Tribute Code, Relationship, Salutation Code, Merge Code, and Sender Code fields), but they cannot delete rows or edit the primary key.

To enter notification information

1. Open the recipient's record in the Manage customers window.
2. Select the Notification tab.
3. Set the focus on the empty row at the bottom of the tab.
4. Enter individuals to be notified:

- Enter the Notify ID. This is the ID of the individual who is being notified of the contribution.
- Tab to the Memorial/Tribute Code field and select a code from the drop-down list.
- Tab to the Relationship field and select a code from the drop-down list.
- Tab to the Salutation Code field and select a code from the drop-down list.
- Tab to the Merge Code field and select a code from the drop-down list.
- Tab to the Sender Code field and select a code from the drop-down list.
- Click Save.
- Repeat for each additional individual that you want to notify.

To edit notification information

1. Open the recipient's record in the Manage customers window.
2. Select the Notification tab.
3. Set the focus in the field you want to modify.

4. Make any necessary modifications.
5. Click Save.

To delete notification information

Note: The Delete button must be enabled by your administrator.

1. Open the recipient's record in the Manage customers window.
2. Select the Notification tab.
3. Set the focus on the record you want to delete by clicking the box to the left of the row.
4. Click Delete.
5. Click Save.

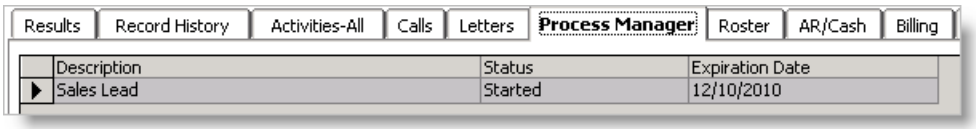
Viewing project information

The Process Manager tab enables you to view projects that meet the following criteria:

- The current contact is listed as the Primary Contact of one or more Process Manager projects.
- The current user is a member of an Opportunity security group with sufficient permissions to view the projects.

The following fields display on the Process Manager tab: Description, Status, Expiration Date. The Process Manager tab does not allow editing or inserting of information, however, you can double-click on any project listed to open the Process Manager and view more information or, with the proper permissions in place, make edits to a project.

Manage customers window - Process Manager tab



From Customers, select Manage customers, find customer record, and select Process Manager tab

To view projects

1. Load a customer's record in the Manage customers window.
2. Select the Process Manager tab.
3. Use the scroll bar to move up and down the log.
4. To see more information about a project, double-click on that project.

To edit projects

1. Open a customer's record in the Manage customers window.
2. Select the Process Manager tab.
3. Use the scroll bar to move up and down the log.
4. To see more information about a project, double-click on that project.

Customer Communication

iMIS Customer Management enables you to perform the following tasks in managing your customer communication options:

- Copy and paste customer information into other applications.
- Customize the information contained in customer profiles.
- Print customer profiles.
- Print customer address labels.
- Write and send letters to customers.
- Send email messages to customers.
- Open Microsoft Word documents from within iMIS.

Generating customer profiles

The iMIS customer profile is a customizable, résumé-style report that lists most of the information available for a customer's record. The profile is a convenient way to get a printed hard copy or on-screen summary of customer details including the following:

- Name
- Address
- Lists
- Customer activity records (grouped by type)

To customize customer profiles

The information generated in customer profiles is completely customizable. Your administrator can set up windows to display the content of custom window fields in customer profiles. When this option is enabled, the customer's information contained within custom window fields displays in a customer's profile.

Note: When the Show window fields on customer profile|topic=To display custom window fields in customer profiles option is enabled, the customer's profile information is generated in an Omnis report only. The profile information does not display in a Crystal report.

Individual activity types can also be enabled to display customer activity records. These activity records are grouped according to activity type, and you have control over the order in which the activity types display in the customer profiles.

To print a customer's profile

1. From Customers, select Manage customers.
2. Find the customer's record. (See Finding Customer Records for more.)
3. Select File> Report Destination> Screen to change the report destination to screen.
4. Click Print, located at the bottom of the Manage customers window.
5. If this is the profile you want to send to the printer, select the Print icon at the top of the Member Profile window.

Creating letters

In Customers, you can write and send letters while you have a customer's record open with one of the following tools:

- Microsoft Word™ Integration (Letter System)
- QuickLetter

Tip: If you have created the Letter activity type, creating a letter for an individual customer generates an activity record for that customer.

To create a letter for a single customer using QuickLetter

1. From Customers, select Manage customers.
2. Find the customer's record.
3. Select the Letters tab.
4. Click New Letter to display the Letter Text window.

   You can create a standard letter, which you may customize, or you can create your own letter.

   - To create your own letter, click New and type the text in the white text entry box.
   - To use a standard letter, select Standard Letter on the Letter Text window to open the Find window.
   - Select a standard letter and click OK or double-click the letter to open it in the Letter Text window.

   Note: The bracketed text in the window tells iMIS to automatically access this information from the current system settings. For example, [today] automatically generates the current date and enters it into the letter.
5. Enter text for the letter.
6. Click Save as Standard on the Letter Text window to save the letter for this customer.
7. Enter a Letter Name in the space provided.

Note: Do not choose the same name as an existing iMIS Standard Letter. If you choose the same name as an existing Standard Letter, your letter replaces the Standard Letter, but revisions are overwritten during a System upgrade.

8. Click Print. An activity record is created.

To add system variables to a letter created using QuickLetter

Designing a customized standard letter is much like setting up any mail merge template. You create a master letter that has field name markers where the merged data will display.

Where you want personalized information to display, you will enter the appropriate variable name enclosed in square brackets [ ]. For example, the format of the variables is [Table.FIELDNAME], and [Name.INFORMAL] brings in the informal name or nickname from the customer record (the Informal field of the Name table).

When you print the letter for a customer, the variable names will be replaced by the actual data from the customer's record or other appropriate places. The variables can call any field in the Name table and fields created in the Customizer.

In addition, iMIS supplies the following special variables that are preset to retrieve certain formatted fields or current system settings:

- [Today] - Prints the current date in the system.
- [Name.TITLE] - Prints the customer's title as it displays in the Manage customers window.
- [Name.INFORMAL] - Prints the customer's informal name as it displays in the Manage customers window.
- [Name.COMPANY] - Prints the customer's company name as it displays in the Manage customers window.
- [Name.FULL.ADDRESS] - Prints the customer's formatted preferred mail address.

To change a letter format in QuickLetter

In the iMIS standard letter system, you can use the Letter Format option to change the following:

- Heading (to print an organizational header across the top) or No Heading (to print on letterhead paper where the letterhead is across the top)
- Print Width (5 ½ inches or 6 ½ inches). The 5 ½-inch print width is designed for printing on letterheads where the letterhead is down the left side of the page.
- Signature or No Signature (to print at bottom) if you have a signature set up in Report Specifications

Note: When you change the format for a letter, the selected format is written to the report description so that the next time the report is selected from the Letter Text window, the most recently selected format will be used.

To modify any of these settings, follow these steps:

1. From Customers, select Manage customers.
2. Find the customer's record.
3. Select the Letters tab.
4. Click New Letter to open the Letter Text window.
5. Click Standard Letter on the Letter Text window.
6. Select and open a Standard Letter in the Find window.
7. Select Options on the Letter Text window (in the upper right corner).
8. Select Letter Format and choose a format for your letter.

Note: The Letter Format options correspond to the six available letter report formats on the Report Specifications window.

- If you want to print on letterhead paper (where your letterhead is at the top of your paper), make sure you pick a format that begins with the words No Heading. If your letterhead is along the left side of your paper, select a letter format that includes the words 5” Print

Width.

- If you want to print your organizational header at the top of the letter and your header was specified in system setup, pick a format that begins with the words iMIS Standard.

9. Click Save as Standard on the Letter Text window to save the letter for this customer and open the Letter Name window.
10. Enter a descriptive name for the letter and click OK to save the letter.
11. Set your report destination to screen (File> Report Destination) to see a preview of your letter. To actually print your letter once you approve of the page preview, select P in the top right corner of the window.

    When you close the customer record and then reopen it, you can select the Letters tab to see a history of the records sent to the customer. The letter you just created and printed will be listed there.
12. From Customers, select Manage customers.
13. Find the customer's record.
14. From Customers, select Generate reports to open the Generate reports window.
15. Select Letters from the Report Types column.
16. Select a letter from the Available Reports column.

    Note: Sample MS Word templates cannot be used with QuickLetter.
17. Click Run to open the Member/Contact Selections window.
18. Select Individual Only from the Member/Nonmember category.

    The template opens with the text displayed. Select the Print icon to print the letter.

    To merge a letter for a single customer using the Letter System

    Note: When using the Letter System, you will need to close any other instances of MS Word that you may have open.

1. From Customers, select Manage customers.

2. Find the customer's record.
3. Select the Letters tab.
4. Click New Letter to open the Membership Standard Letters window.
5. Select the letter to merge from the Membership Standard Letters window.
6. Click Merge and enable the activity options for your merge:
7. Enable the Create Activity records with merge option to create the LETTER activity for each customer record.
8. Enable the Create EMAIL Activities with merge option to create the EMAIL activity instead of the LETTER activity.

   Note: If you want to email the letter to customers and create an e-mail activity, you must enable both options. An EMAIL activity type must be defined in the database.
9. Enable the Include Bad Addresses with merge option to include in your merge, those addresses that have an invalid status.
10. Click Continue to open MS Word.

    The template opens in MS Word with the text and merge fields displayed.

    Note: An activity is automatically created for a merge completed on the Letters tab.
11. Start the merge process:

- In MS Word, select the Merge to New Document icon on the toolbar to open the Merge to New Document window.
- Select All records or enter a range.
- Click OK to display the letters.

    If you selected New document, the letters are shown.

12. Print the form letter.
13. Close the Form Letter window.

14. Close the template (.DOC) file.

To merge an email letter for a single customer using the Letter System

To ensure all letters are delivered by email, verify the E-mail field for each customer is populated on the Manage customers window.

Note: When using the Letter System, you will need to close any other instances of MS Word that you may have open.

1. Open your email program.
2. From Customers, select Manage customers.
3. Find or insert a customer record.
4. Select the Letters tab.
5. Click New Letter to open the Membership Standard Letters window.
6. Select the letter template to merge.
7. Click Merge to open the Membership Standard Letters window.
8. Enable the Create Activity records with merge option to create the LETTER activity.
9. Enable the Create EMAIL Activities with merge option to create the EMAIL activity for each customer record.

   Note: An activity is automatically created for a merge completed on the Letters tab. If you want to email the letter to customer and create an email activity, you must enable both options. An EMAIL activity type must be defined in the database.
10. Enable the Include Bad Address with merge option to include those addresses that have an invalid status.
11. Click Continue. The template opens in MS Word with the text and merge fields displayed.
12. In MS Word, select the Merge to E-mail icon on the toolbar to open the Merge to E-mail window.
13. Select NameEMAIL from the To drop-down list.

14. (optional) Enter a Subject line.
15. Select the Mail format drop-down list and select the appropriate format.

    Note: If you select the Attachment format or the Plain Text format, two message prompts will display for each record that is being merged. Click Yes for each prompt. The message prompts will not display if you select the HTML format.
16. Click OK to display the letters
17. Close the Form Letters window.
18. Close the template (.DOC) file.

    To view a letter or email activity

    You can view activities for a letter or email on the Letters tab or the Activities-All tab.

    Note: A given LETTER activity will reflect a letter's text only when that text differs from the permanent text stored in the letter template. For example, if you send a letter to all of your customers but add additional information (such as an answer to a customer's question) to only one of the letters, the entire text of that letter would be stored for that customer's LETTER activity.

    The letter text associated with the template is saved to the Activity_Attach.ATTACH_TEXT table. Once a template is saved, all future letter activities will use the original template, regardless if the template is changed.

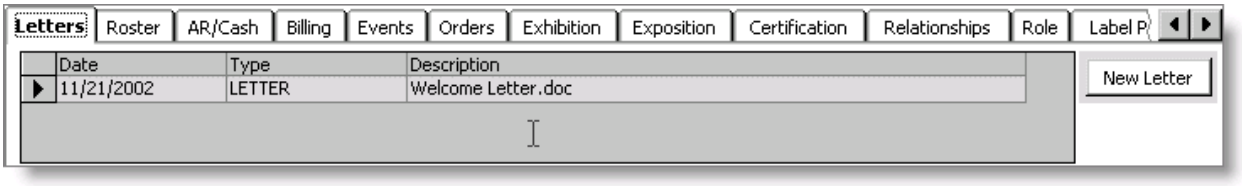
1. To view a letter from the Customers module:

- Select Manage customers.
- Find a customer record with a LETTER or EMAIL activity record.
- Select the Activities-All tab.
- Double-click an EMAIL or LETTER activity to open the Activity Detail window.

2. To view an EMAIL or LETTER activity through the Letters tab:

- From Customers, select Manage customers.
- Find a customer record with a LETTER or EMAIL activity record
- Select the Letters tab.

3. Double-click the letter or email line item to open the Activity Detail window.



The Letters tab

Emailing customers

You can send an email message to a customer if the following applies:

- An email address exists for the customer in the E-mail field of Customer > Manage customers
- You have Internet access
- You have an email client system that is MAPI compliant (such as Microsoft Outlook)

Sending an email to an individual customer will generate an activity record for that customer if you have created the EMAIL activity type.

To email a customer from the Manage customers window

1. From Customers, select Manage customers.
2. Find the customer's record.
3. Select the E-mail icon on the E-mail field. The email message window opens for the email client system that you have.
4. Enter text for the email.

Note: If you use Outlook 98 as your email client, the autosignature will not work when you use the E-mail icon on the Manage customers window. This is a MAPI limitation in Omnis. As a workaround, manually insert the signature at the end of the email message.

To email a letter to a customer using QuickLetter

1. From Customers, select Manage customers.
2. Find the customer's record.
3. Select the Letters tab.
4. Click New Letter to open the Membership Standard Letters window.
5. Select Standard Letter to open the Letter Find window and select a standard letter to modify.
6. Enter text for the letter.
7. Click E-mail on the Letter Text window to open your email client system's message window.
8. Select Send.

To email a letter to multiple customers using QuickLetter

1. From Customers, select Generate reports to open the Generate reports window.
2. Select Letters from the Report Types field.
3. Select a letter in the Available Reports field to open the Member/Contact Selections window. Only certain letters will generate an email.
4. Click Run.
5. Select the customers you want the letter to be emailed to by selecting the appropriate options on the Member/Contact Selections window.
6. Click OK on the Member/Contact Selections window to send the email and open the View E-Mail Results window.

iMIS generates a detailed email Results list of the selected customers. The letter is emailed only to those customers that have an email address listed in the E-mail column. Those customers that are not sent the email are listed in the Error column of the list. The error “Email Address is Blank,” indicates that the E-mail field of the customer's record does not have an email address listed.

7. Click Print on the View E-Mail Results window to print the results.
8. Click Close to close the Member/Contact Selections window.

To send a broadcast email from Microsoft Word using an email merge

1. Make sure the Name.EMAIL field has been added to the iMIS export file.
2. Set up a Mail Merge in Microsoft Word by selecting Tools> Mail Merge.
3. When you are ready to Merge the data with the document (Step 3 in the Mail Merge process), select Merge.
4. Select the drop-down menu and select Merge to Electronic Mail.
5. Select Setup and choose the Email field as the Data field with Mail/Fax Address.
6. Select whether to send the document as an attachment.
7. Click OK in the Setup window.
8. Select Merge. The email will automatically send to all records included in your merge.

To view a customer's email activity record

1. From Customers, select Manage customers.
2. Find the customer's record.
3. Select the Activities-All tab.
4. Select Email from the drop-down list.
5. Select an email activity to open the Activity Detail window. The text that displays in the Email Text field is dependent upon how the email was sent:

- If the email was sent using the Email option on the Letters tab, the Email Text field displays the text of the email.
- If the email was sent using the Email option on the Manage customers window, the Email Text field displays the location from where the email was sent.

Printing customer address labels

iMIS prints customer address labels in bulk or one at a time.

- To print address labels in bulk, use the Labels report type from the Generate reports window.
- To print address labels one at a time, use the printer icon in the address area of the Manage customers window.

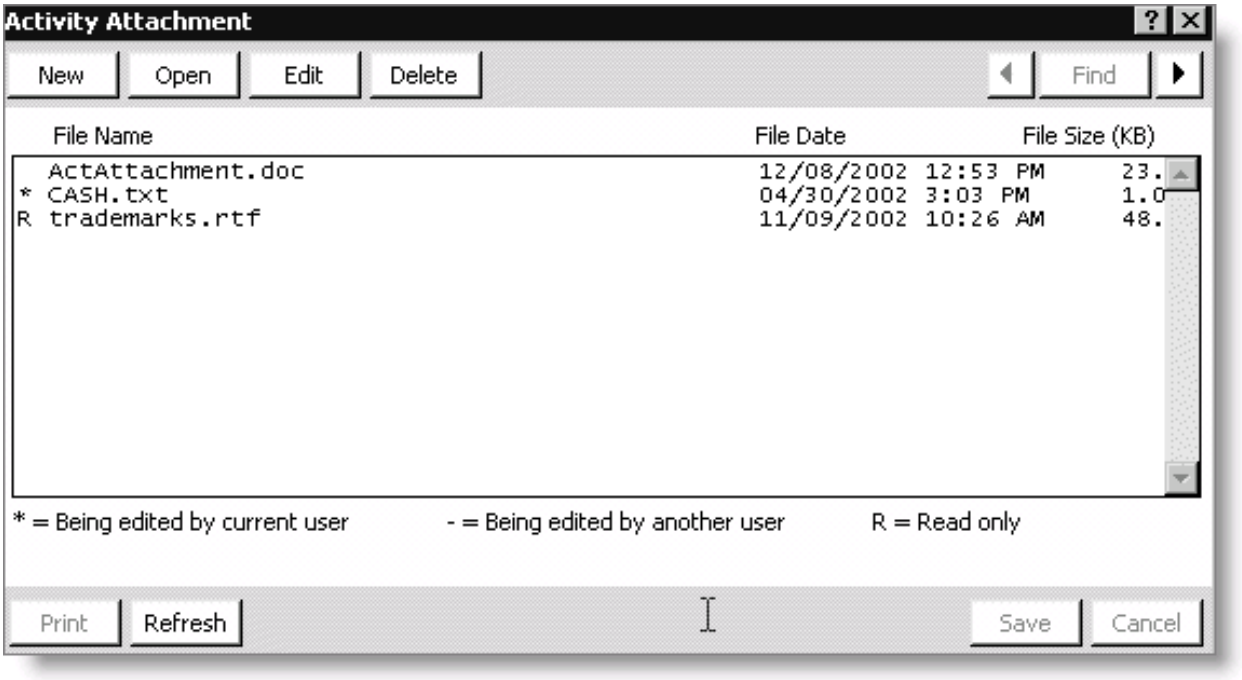
  Note: You must install a label printing device on your computer to print labels one at a time.

Attaching documents to activity records

When you open an activity record and click the Attachment button on the Activity Detail window, you can attach a file to the activity record and save it to the iMIS database. For example, you can attach a Microsoft Word document, PowerPoint slide presentation, spreadsheet, graphic, e-mail file, or html page. Once the file is saved to the iMIS database, you can open it on your system using the associated application and view, modify, or delete it from within iMIS.

Note: The Attachment button is enabled only if the Activity Attachments allowed option is enabled in the System Setup window. See Enabling attachments on activity records for details.

Activity Attachment window



From Customers, select Manage customers, select a customer record, select the Activities-All tab, double-click an activity, click Attachment

Attachment List

Lists of attachments.

Attachment Legend

Indicates the current status of an attachment:

- * - Indicates an attachment is being edited by the current user.
- - - Indicates an attachment is being edited by another user.
- R - Indicates an attachment is only editable by an administrator.

Refresh

Rebuilds the list of attachments.

Attaching files to activity records

Activity attachments are managed in the Activity Attachment window. When you click Attachment on the Activity Detail window, the Activity Attachment window displays with a list of attachments, listed alphabetically according to file name, for the current activity. You can access the Activity Detail window by double-clicking a record in the Activities-All, Call, or Letters tab, or by accessing the View activity tasks window and double-clicking an activity task.

The total number of activity attachments that exists for an activity record displays in the Attachment(s) column on the Calls tab for call activities, and on the Activities-All tab for all activities.

To attach a file to an activity record

Note: Your administrator must enable the Allow user Edit option for the activity for which you want to add an attachment.

1. From Customers, select Manage customers.
2. Find a customer's record.
3. Double-click the activity record to which you want to attach a file. The Activity Detail window displays.
4. Click Attachment to open the Activity Attachment window.
5. Click New. The Choose the file to attach to the Activity dialog displays. Browse to the file you want to attach to the activity record.
6. Click OK. A message box opens and gives you the option to save as read-only.
7. (optional) Enable the Save as read-only option to specify that only an administrator (a user with Customer authorization level of 8 or higher) is able to edit the attachment. If you do not enable this option, all users with appropriate permissions will be able to edit the attachment.
8. Click Yes to save the attachment to the database and to add it to the list of attachments on the Activity Attachment window. Clicking No will cancel the activity attachment process.

Note: If you attempt to attach a file that exceeds the value specified by your administrator, iMIS displays a message that the file exceeds the file limit.

To create an activity and attach a file

You can add an activity record and attachment at the same time.

1. From Customers, select Manage customers.
2. Open a customer record.
3. Select the Activities-All tab.
4. Select the drop-down list located directly below the Sort by area, and select the activity type you want to create.
5. Double-click the gray box containing the asterisk (*) to open the Activity Detail window.
6. Click New.
7. Enter an activity type in the Type field, or click the lookup icon to select an activity type.
8. Enter values according to the fields that display.
9. Click Attachment to open the Activity Attachment window. The activity record is automatically saved.
10. Click New. The Choose the file to attach to the Activity dialog displays.
11. Browse to the file you want to attach to the activity record.
12. Click OK. A message box opens and gives you the option to save as read-only.
13. (optional) Enable the Save as read-only option to specify that only an administrator (a user with a Customer authorization level of 8 or higher) is able to edit the attachment. If you do not enable this option, all users with appropriate permissions will be able to edit the attachment.
14. Click Yes to save the attachment to the database and to add it to the list of attachments on the Activity Attachment window. Clicking No will cancel the activity attachment process.

Viewing activity attachments

When you click the Open button on the Activity Attachment window, iMIS extracts a read-only version of the file from the Activity_Attach table and copies it to a subfolder under the temporary folder iMIS creates (for example, C:\Documents and Settings\Username\Local Settings\Temp\iMIS attachments). The associated document viewer for the file is then opened (for example, Microsoft Excel for files with an .xls extension). If the destination file already exists, a message displays informing you that the file has already been opened on your system. You will be given the opportunity to overwrite the existing file.

Note: Once you open an activity attachment, you can use the save functionality (usually the Save As feature) in the associated application to save a local copy of the file in a location other than the temporary folder created by iMIS. However, any changes you make to this copy will not be applied to the iMIS database.

To view activity attachments

1. From Customers, select Manage customers.
2. Find a customer's record.
3. Double-click the activity with the attachment you want to view. The Activity Detail window displays.
4. Click Attachment to open the Activity Attachment window.
5. Select the attachment you want to view.
6. Click Open.

iMIS opens the document in the appropriate application, if the application associated with the file is on your system.

Note: If the application associated with the file is not on your system, iMIS informs you that there is no application available to open the file, and that a copy has been placed on your system. You can open the file from your Temp directory and choose an application in which to open the file. However, any changes you make to this copy will not be applied

to the iMIS database. Changes are only saved to the iMIS database when you click Save on the Activity Attachment window.

To edit activity attachments

Clicking Edit on the Activity Attachment window sets the INTENT_TO_EDIT column in the Activity_Attach table to the concatenated DateTime + User ID value to indicate that an attachment has been opened for editing by a specific user. If INTENT_TO_EDIT is populated, then a second user is not allowed to open the activity attachment for editing. If you attempt to edit a record that is being edited by another user, a message displays informing you that another user is editing the file, and that you can open a read-only copy of the file. If you attempt to edit a file that you already have open for editing, a message displays informing you that you are currently editing the file and that you should save or cancel your previous edits.

Once you have an activity attachment open for editing, you can make any necessary changes, and use the save functionality in the associated application (usually the Save As feature) to save a local copy of the file in a location other than the temporary folder created by iMIS. However, any changes you make to this copy will not be applied to the iMIS database. Changes are only saved to the iMIS database when you click Save on the Activity Attachment window.

Note: When activity attachments are saved to the database, iMIS creates a folder in a Temp directory (for example, C:\Documents and Settings\Username\Local Settings\Temp\iMIS attachments).

Note: If more than one user logs into a terminal server installation of iMIS as MANAGER and attempts to edit an activity attachment, iMIS saves to the database and to the Temp directory, the activity attachment that is first saved on the Activity Attachment window.

1. From Customers, select Manage customers.
2. Find a customer's record.
3. Double-click the activity with the attachment you want to edit. The Activity Detail window displays.

4. Click Attachment to open the Activity Attachment window.
5. Select the attachment you want to edit.
6. Click Edit. iMIS opens the attachment in the appropriate application, if the application associated with the file is on your system.

   Note: If the application associated with the file is not on your system, iMIS displays a message informing you that an application viewer is not available and that the file cannot be edited. You can still open the file from your Temp directory and choose an application in which to open the file. However, any changes you make to this copy will not be applied to the iMIS database. Changes are only saved to the iMIS database when you click Save on the Activity Attachment window.
7. (optional) Click Save on the Activity Attachment window to save your changes.

   To delete activity attachments

   An important maintenance step in working with activity attachments is deleting activity attachments that are no longer needed. You can delete activity attachments from the Activity Attachment window, or run a script to delete activity attachments that have a File Date earlier than a specific date. When an activity attachment is deleted, the Attachment (s) column on the Activities-All or Calls tab updates to reflect the deletion.

   You can delete an activity attachment only when another user does not currently have the file open for editing (indicated by a dash “-”), and the file is not read-only. If you click Delete on the Activity Attachment window and another user has the file open for editing, a message displays informing you that another user is editing the document.

   Caution! Deleting an activity attachment permanently removes the file from the iMIS database.

   Note: Only system administrators can modify activity attachments marked as read-only.

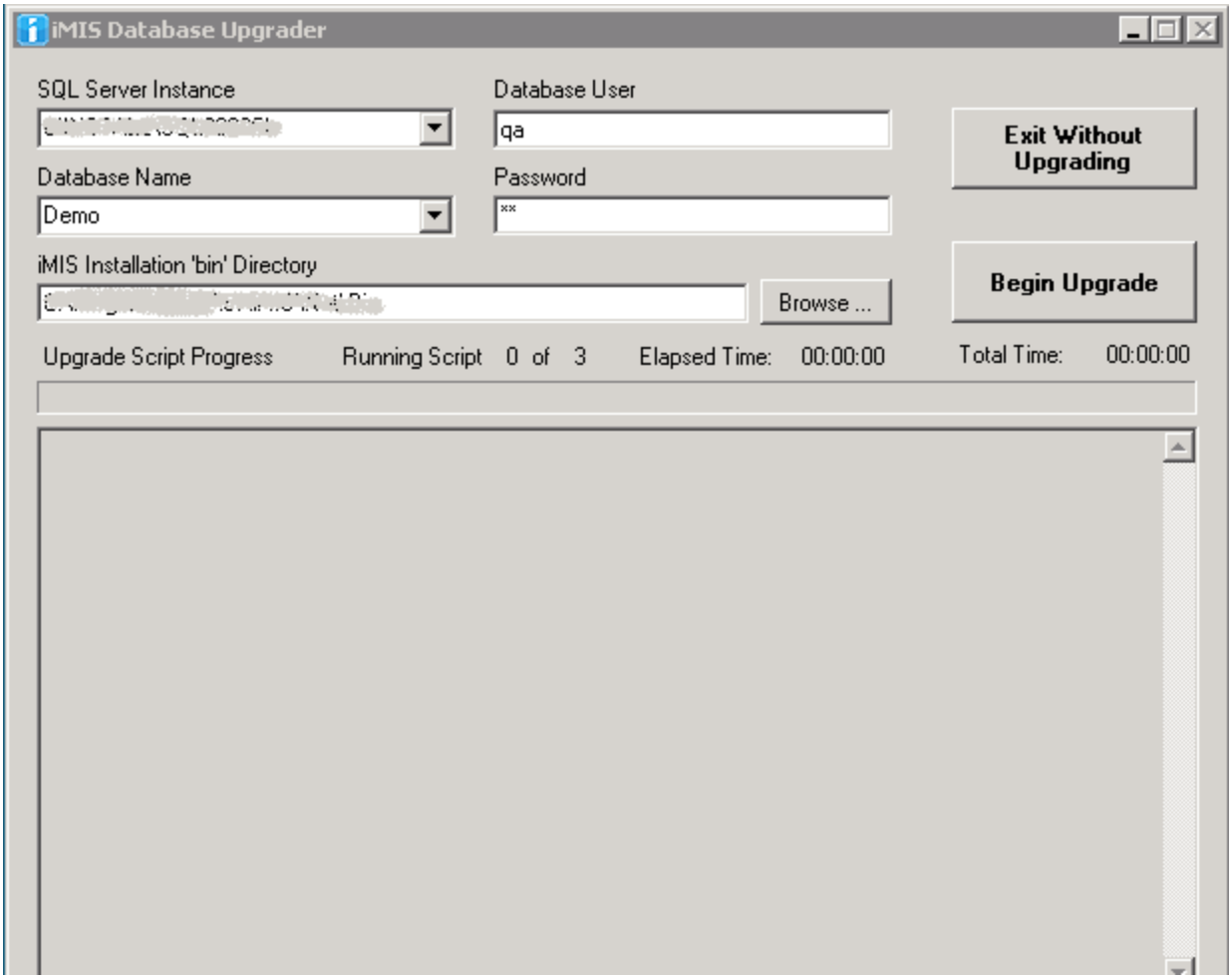
1. From Customers, select Manage customers.
2. Find a customer's record.
3. Select the Activities-All tab.

4. Double-click the activity record containing the attachment you want to delete. The Activity Detail window displays.
5. Click Attachment to open the Activity Attachment window.
6. Select the attachment you want to delete.
7. Click Delete. A message displays asking you to confirm the deletion.
8. Click Yes to permanently delete the attachment from the iMIS database, or No to cancel.

Database Utilities

iMIS Database Upgrader: DB Upgrader

You can run iMIS Database Upgrader (DB Upgrader) standalone from the iMIS program group. Use View Logs to quickly locate and view log outputs for all upgrades, completed and failed.



Important: Special characters in your sa password can disrupt command-line processing, so change the password to use only alphanumeric characters and ! # @, with no spaces. You may use hyphens and underscores after the first character, but avoid all other punctuation and symbols.

Begin Upgrade

This button runs a set of database upgrade scripts against the specified iMIS database. The specific scripts that are run depend on how many versions back the database is from the current version of iMIS. There is one upgrade script per version, so the upgrader upgrades the starting version to the next version, then the next, and so on until the final script updates the database to the current release of iMIS.

The following error message appears in the iMIS15DBUpgrade.log if the upgrade process fails:

*** UPGRADE PROCESS ENDED WITH ERRORS !!! ***

To determine how to retry the database upgrade after fixing the problems suggested by the point at which the failure occurred, you first must identify which upgrade script failed by scrolling up through the log until you find the header stamp that immediately precedes the error message. Header stamps look like this:

==========

= iMIS 15.0.2.x to iMIS 15.0.3.x Database Upgrade Driver Script =

==========

The version numbers shown in the header stamp determine how you must retry the database upgrade:

- If the first version number shown in the header stamp (the one on the left) is 15.1.1 or higher, you should fix the data in the current version of the database, then in the iMIS 15 Database Upgrader, click Begin Upgrade to resume the database upgrade from the beginning of the step that failed.

  If you want to restart the upgrade from some step earlier than the one in which the failure occurred, run the following UPDATE against the database, specifying a ParameterValue that is the step at which you want to restart the upgrade (use a value of 0 to force the upgrade to restart at the very beginning):

  UPDATE [dbo].[SystemConfig]

  SET [ParameterValue] = 3 -- The last completed step number

WHERE [ParameterName] = 'System.Database.State'

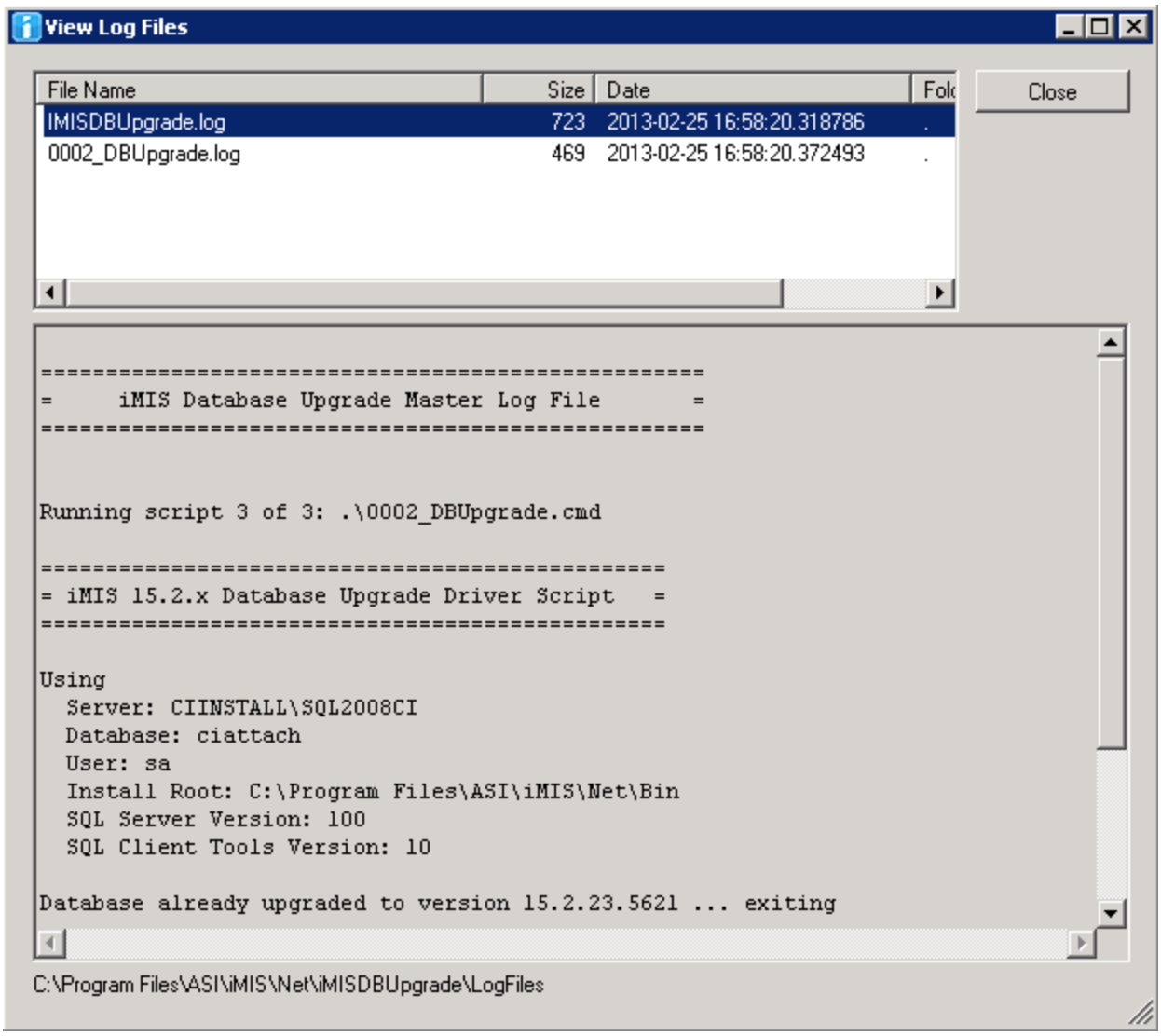
- If the first version number shown in the header stamp is lower than 15.1.1, you must first restore the database to the backup you made before beginning the upgrade process. Next, fix the data in that restored version of the database. Finally, in the iMIS 15 Database Upgrader, click Begin Upgrade to restart the entire database upgrade process. Note that you cannot click Begin Upgrade until you have restored the database to a backup preceding its failed upgrade state.

  View Log Files

  The log files appear chronologically by run time. To sort the list by any column, click on its header. To help you spot errors, *.err files have red highlighting.

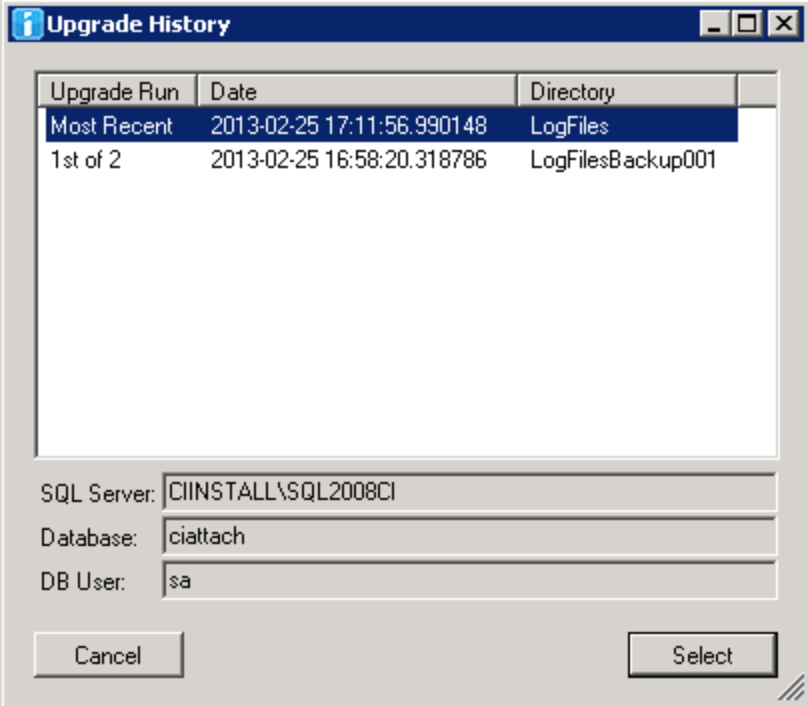
  The contents of the selected log display below the list, and the pathname displays at bottom. At top right, the Viewing: information and Log History command remain hidden until you have run multiple upgrades.

  Note: Tip: You can select and copy text within both the log contents and the pathname areas.



Upgrade History window

All logs of every run are preserved, so use this archive to access prior runs, for getting log file locations and copying log file text (such as error messages) into other applications or email. The Upgrade History lists the order, date, and location of all the upgrades that have ever been run. Below the list, you can see which user, server, and database name were used for the selected upgrade.



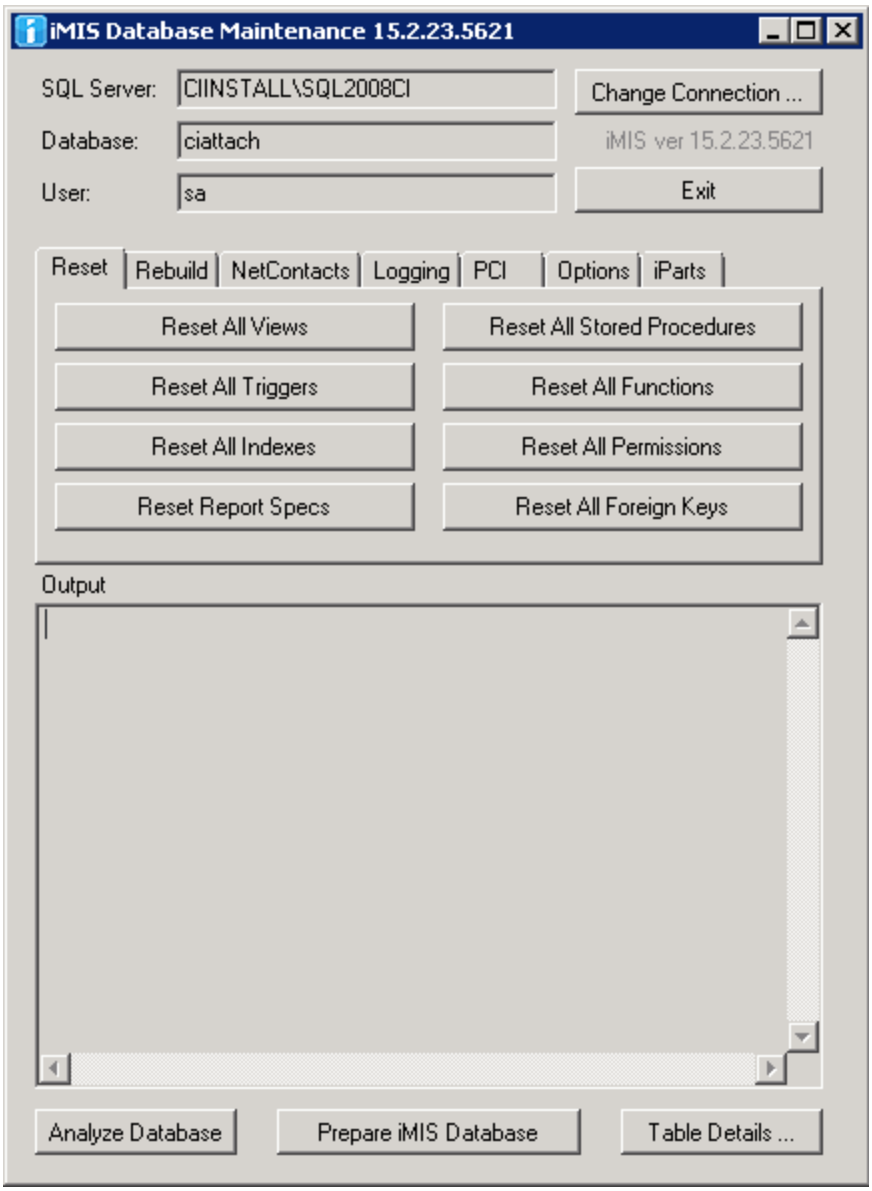
Click Select to return to the previous window with the selected run's logs displayed, rather than the most recent run (the default).

iMIS Database Maintenance: DB Maintenance

iMIS Database Maintenance (DB Maintenance) is a standalone application that replaced the iMIS 10 Table Analysis utility. This tool lets you rebuild, analyze, and manage all iMIS tables. It also lets you run special scripts that prepare your database to support advanced options, such as PCI, NRDS, and VAT.

Note: Tip: The DB Maintenance utility replaces DB Repair.

DB Maintenance runs as a separate, local application from the iMIS program group and organizes helpful database commands on a set of tabs.



- Change Connection – Switch to another iMIS database.
- Output – Displays information about the functions performed; this information also writes to a log file in the executable's directory.
- Analyze Database – Run a full analysis on the entire iMIS database. This process performs an extensive database analysis, so allow ample time for it to run.

  Table analysis testing:

- missing table
- missing or extra columns
- wrong column order, data type, length, or defaults
- wrong numeric precision, scale, radix
- missing index
- missing PK/unique/clustered index
- missing or disabled triggers
- missing or disabled/distrusted foreign keys
- Prepare iMIS Database – Prepare an iMIS database that has just been restored to a new location or under a new name.
- Table Details – Analyze, examine, reset, or rebuild individual tables.

  Precautions for using DB Maintenance

- Verify that you have a valid backup of your iMIS database before running DB Maintenance commands that modify the database.
- Ensure the database is protected from updates before modifying it, to prevent failures and data problems from changes occurring while entities are being reset/rebuilt/removed:

1. Have all users log out.

   Stop webservers from updating the database, such as by stopping the AppPool in IIS.

- While users are logged in, you can safely run Analyze Database and Table Details; however, analyzing the database can affect performance.

DB Maintenance tabs

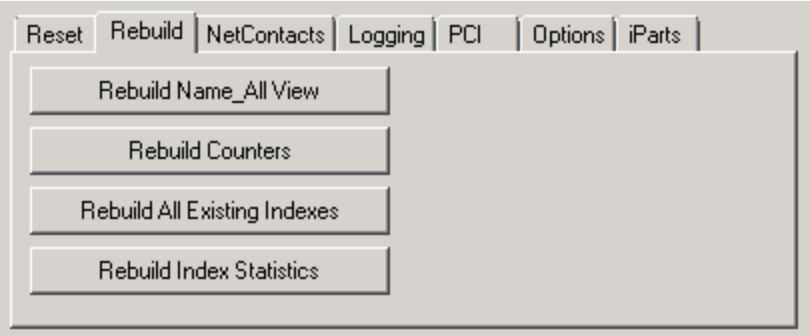
Reset tab

These functions restore database items to the states they held when last upgraded or installed.

- Reset All Views: Drop and recreate all iMIS System Views to what they were at the last install/upgrade. Custom Views are unaffected.
- Reset All Triggers: Drop and recreate all iMIS System Triggers to what they were at the last install/upgrade. Custom Triggers are unaffected.
- Reset All Indexes: Drop and recreate all iMIS System Indexes to what they were at the last install/upgrade. This preserves custom indexes, as well as primary and alternate key indexes, because of foreign key constraints (relevant only for newer .NET tables).

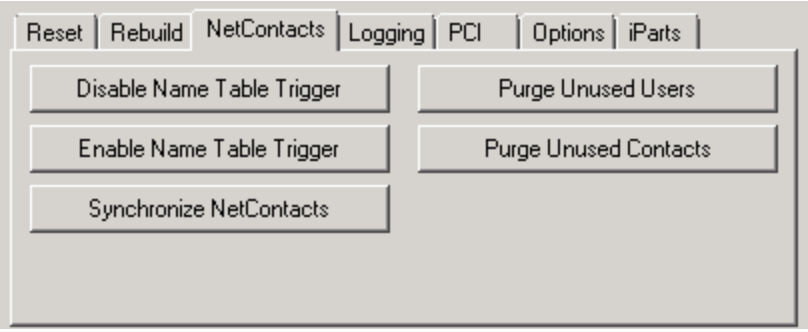
  Caution! This function will not complete successfully if your iMIS database contains any full-text indexes. You must first drop all full-text indexes that might exist in your iMIS database, and then manually re-create them after you have finished running this function.
- Reset Report Specs: Reset all iMIS Standard Report Specifications to what they were at the time of the last install or upgrade. These specifications are found in iMIS Desktop, from the menu Utilities > Report Specs. Custom report specifications are not affected.
- Reset All Stored Procedures: Drop and recreate all iMIS System Stored Procedures to what they were at the last install/upgrade. Custom Procedures are unaffected.
- Reset All Functions: Drop and recreate all iMIS System Functions to what they were at the last install/upgrade. Custom User Defined Functions (UDFs) are unaffected.
- Reset All Permissions: Reset the permissions on all iMIS System database objects to what they were at the last install/upgrade. This grants permissions to all iMIS System database objects to the iMIS group as required.

  Rebuild tab



- Rebuild Name_All View: Rebuild the Name_All View, which is not rebuilt by Reset All Views.
- Rebuild Counters: Rebuild all iMIS counters.
- Rebuild All Existing Indexes: Rebuild all iMIS System Indexes. This runs a DBCC REINDEX command against all existing iMIS table indexes.
- Rebuild Index Statistics: Update all iMIS System Index Statistics.

  NetContacts tab



  NetContacts

  NetContacts commands help you avoid errors when importing contact records into iMIS. (“NetContacts” takes its name from the CsNetContacts business object.)

  In iMIS 15, a Name table trigger copies data to numerous .NET tables (such as ContactMain, Individual, Institute); the NetContacts tab helps you achieve the same synchronization when you import contacts into iMIS (see "Importing contact records").

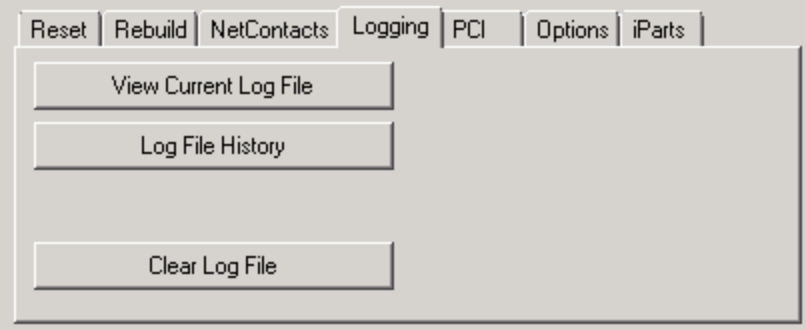
- Disable Name Table Trigger: Disable the trigger on the Name Table that keeps the NetContacts synchronized.
- Enable Name Table Trigger: Enable the trigger on the Name Table that keeps the NetContacts synchronized.
- Synchronize NetContacts: Synchronize the NetContacts after loading the Name table with the trigger disabled.

  Purge

Purge (see "Purging user and contact records") allows you to permanently delete entries from .NET tables.

- Purge Unused Users: Permanently removes user entries from .NET tables that were previously purged from Client/Server tables.
- Purge Unused Contacts: Permanently removes contact entries from .NET tables that were previously purged from Client/Server tables.

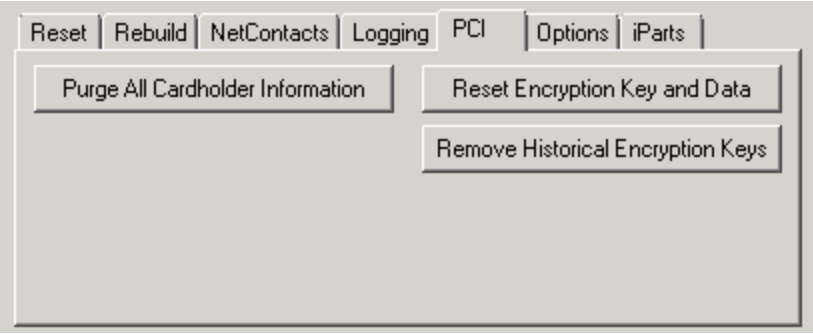
Logging tab



- View Current Log File: View logging information for current log file.
- Log File History: View list of log files, from most recent to oldest and select a file to view.
- Clear Log File: Back up the current log file to a history file, then clear the current log file. This is helpful to keep a shorter, recent list.

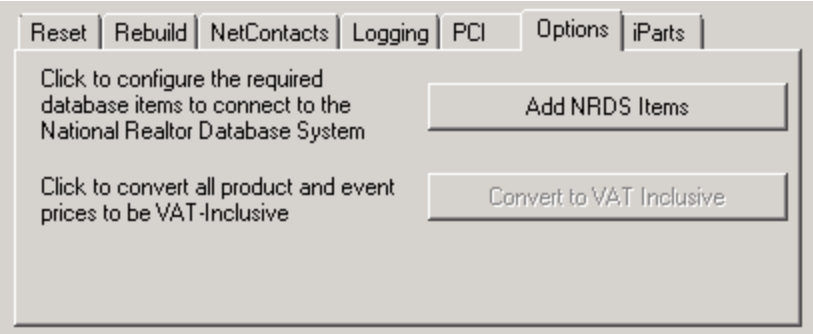
PCI tab

See Using DB Maintenance for PCI compliance.



- Purge All Cardholder Information: Removes all existing cardholder information from your iMIS database (one-time process).
- Reset Encryption Key and Data: (annual process) Resets the encryption keys and re-encrypts cardholder data; writes these events to the PCIAuditLog.
- Remove Historical Encryption Keys: (annual process) Deletes the prior encryption keys and writes the event to the PCIAuditLog. Once done, email links encrypted with such keys cannot resolve.

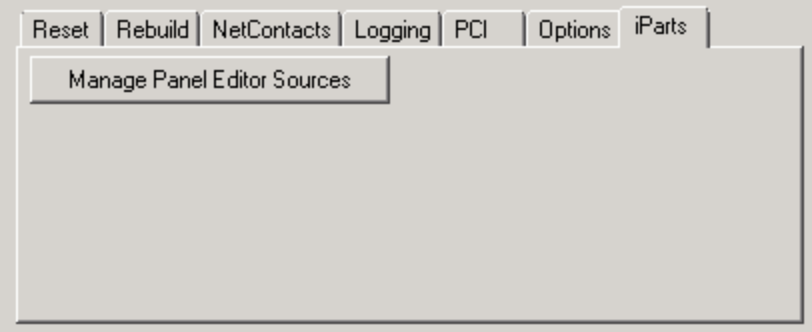
  Options tab



- Add NRDS Items: (NRDS clients only) Click this button to configure the required dataset items to connect to the National Realtor Database System. This creates the items needed for the data synchronization bridge. See Creating NRDS items.
- Convert to VAT Inclusive: (VAT organizations only) Click this button to convert all product and event prices to be VAT-Inclusive. If you enable Convert to VAT Inclusive in AR/Cash, lets you convert your existing product/event pricing to include the VAT tax amount. See Converting to VAT Inclusive.

  iParts tab

  This tab lists iPart-specific maintenance tasks.



- Manage Panel Editor Sources: Click this button to manage sources for the Panel Editor iPart. See Maintaining iParts with DB Maintenance.

DB Maintenance: Table Details

The iMIS Table Details page allows you to do analysis and apply fixes and changes at table level rather than globally. All iMIS tables are listed alphabetically. When you select a table, a mini-analysis runs on it and reports in the Output area.

Features of Table Details

- Number of rows: The top right shows a row count for the selected table.
- Output: For the selected table, a brief table analysis runs, testing whether the table is missing, is missing columns, or has columns of an incorrect type. The analysis runs when you click on a table name in the list. This read-only area shows system information and quick analysis results.
- OK: returns you to the main DB Maintenance page.

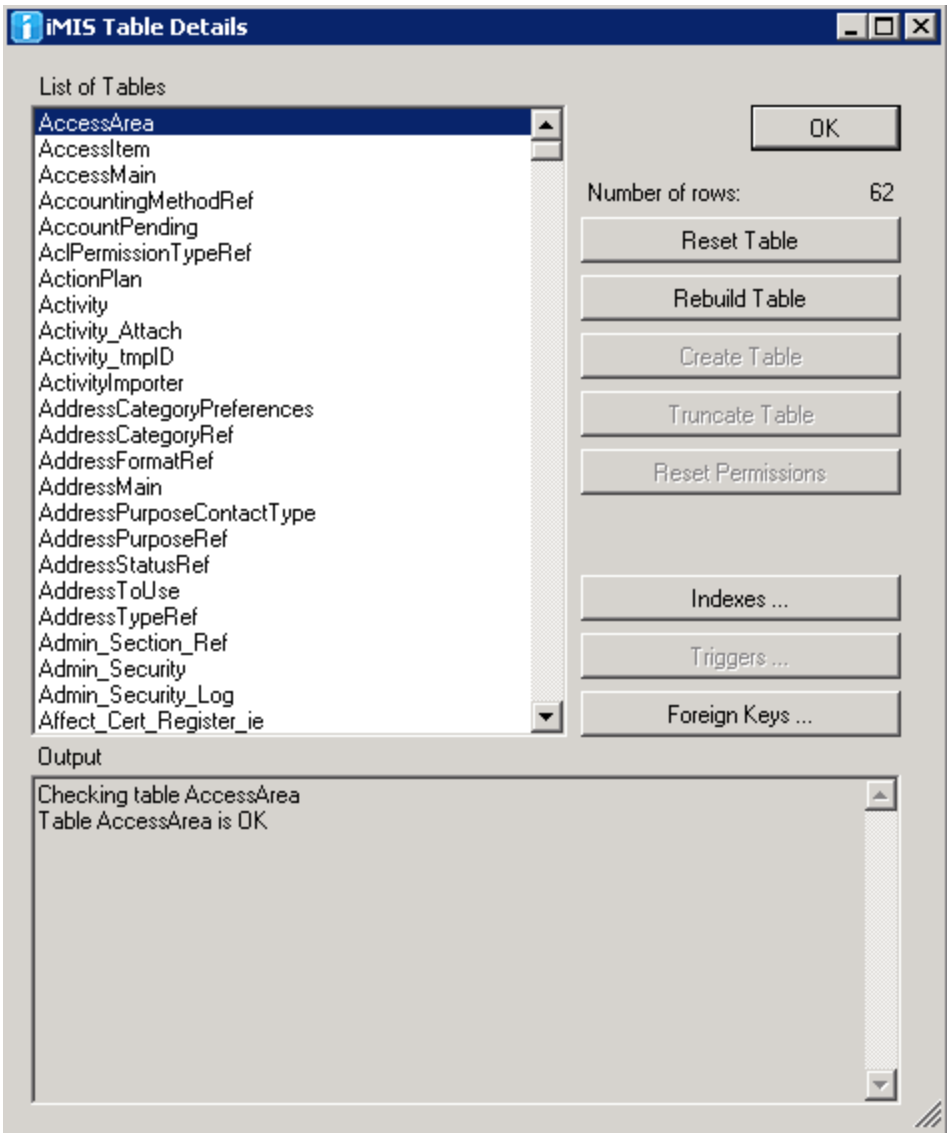


Table-level commands

- Reset Table: Performs a non-destructive reset of the table, replacing any missing triggers, indexes, permissions, or foreign keys.
- Rebuild Table: Performs a full rebuild of the table (rename the table, re-create the table schema, copy the data back over, re-establish all indexes, triggers, and permissions). It recreates the table from scratch, preserving data. If the table contains large amounts of data, allow ample time for this process to run.

Caution! You lose any user-added columns when you rebuild a table. The Rebuild Table button is only enabled for those tables that aren't involved in indexed views. Tables that are referenced by indexed views cannot be rebuilt with this tool, and the button will be grayed out.

- Create Table: Recreates the table schema, indexes, triggers, and permissions. Enabled only if the table is missing.
- Truncate Table: Deletes all the data in the table, following a prompt for confirmation. Truncating a table with zero rows has no effect, but it runs the command just like any other table, and is useful for testing.
- Reset Permissions: Ensures the table is granted the proper permissions to the iMIS Group.

  Indexes... lets you work with indexes associated with the selected table. Enabled only if there are indexes.

- Create Indexes: Creates any indexes that are missing, ensuring that the table has all of the iMIS indexes it needs.
- Drop Indexes: Drops the indexes associated with the table, except for indexes that are constraints; preserves user-added indexes. This does not affect primary or alternate keys, which may be the target of a foreign key constraint.
- Rebuild Indexes: Rebuilds all indexes associated with the table.

  Triggers... lets you work with triggers associated with the selected table. Enabled only if triggers exist.

- Enable Triggers: Re-enables disabled triggers, which is useful after importing records. Enabled only if there are or should be system triggers on the table (ignores user triggers).
- Disable Triggers: Preserves triggers but disables them, which is useful when importing records. Enabled only if there are or should be system triggers on the table (disables user triggers as well).

- Create Triggers: Creates any triggers that are missing.
- Drop Triggers: Drops the triggers associated with the selected table.

  Foreign Keys... lets you work with foreign keys on the selected table as well as other tables that reference it. Enabled only if such foreign keys exist.
- Enable Table FKs: Re-enables any disabled foreign keys on the table and checks them all. Enabled only if there are or should be foreign keys on the table.
- Disable Table FKs: Disables any foreign keys, which is useful when importing records. Enabled only if there are or should be foreign keys on the table.
- Create Table FKs: Creates the foreign keys on the selected table. Enabled only if there should be foreign keys on the table.
- Drop Table FKs: Drops the foreign keys on the selected table. Enabled only if there are foreign keys on the table.
- Create Referencing FKs: Creates the foreign keys on all tables that reference the selected table.
- Drop Referencing FKs: Drops the foreign keys on all tables that reference the selected table.
- Create ALL FKs: Creates the foreign keys on the selected table and on all tables that reference it.
- Drop ALL FKs: Drops the foreign keys on the selected table and on all tables that reference it.

Using DB Maintenance

> **Note:** Caution! If the version number of the database is higher than that supported by DB Maintenance, do not use any database commands until you resolve the version conflict.

To run DB Maintenance

1. From the Start menu, select DB Maintenance Utility in the iMIS program group.
2. When prompted, specify your server and database.
3. Log in using the sa user.

   The next time you run DB Maintenance, it remembers the connection and only requires your password.
4. Verify that the version number supported by DB Maintenance (which appears at top, in the title bar) is the same or greater than the version number displayed to the right of the Database name (which is that of the database you selected).

   Caution! Never run an older version of DB Maintenance against a newer database.
5. Click on any of the tabs to bring it to the front.
6. As needed, run the commands presented by the interface.
7. If you receive an error, check whether it's one of these known situations:

- Column ... has the wrong default. Expected ... '', found '': a harmless error that might be triggered by upgraded databases.
- "Wrong Ordinal" error on certain table columns may be triggered by upgraded databases. This message is generally harmless and affects only the ability to load the affected tables with BCP and the format files created by ASI.

Precautions for using DB Maintenance

- Verify that you have a valid backup of your iMIS database before running DB Maintenance commands that modify the database.
- Ensure the database is protected from updates before modifying it, to prevent failures and data problems from changes occurring while entities are being reset/rebuilt/removed:

1. Have all users log out.

   Stop webservers from updating the database, such as by stopping the AppPool in IIS.

- While users are logged in, you can safely run Analyze Database and Table Details; however, analyzing the database can affect performance.

  Rebuilding tables

  To rebuild a table

  > **Note:** Caution! Never run an older version of DB Maintenance against a newer database.

1. Have all users log out of iMIS.
2. Schedule downtime for rebuilding tables containing large amounts of data.
3. Back up all tables that you plan to rebuild.
4. From the Start menu, select DB Maintenance Utility in the iMIS program group.
5. Select the table to be rebuilt.
6. Click Rebuild Table.

   To rebuild a customized table

   If you have added custom objects (Foreign Key constraints, triggers, indexes) to iMIS tables, you must remove the customizations and then add them back.

1. Record all custom database objects that you have added to your iMIS tables, because you must manually recreate them.
2. Manually remove your objects; for example, drop all foreign key constraints on the table (both to and from the table, so you must also check other referencing tables and drop the relevant foreign keys there as well).
3. Restart DB Maintenance, select the tables, and click Rebuild Table.

   Manually run the script CreateFKs.sql, located by default in the C:\Program Files\ASI\iMIS15\net\iMIS15DBUpgrade\ScriptFiles\IMIS151DBUpgrade folder. This script replaces all standard iMIS 15 foreign keys that were dropped.
4. Manually recreate all custom foreign key constraints that you recorded.

Importing contact records

The NetContacts tab in DB Maintenance helps you import contact records so that your new Name table data is correctly synchronized with all associated .NET table structures.

To import contact records

1. Backup your database.
2. On your appserver, run the DB Maintenance tool.
3. After connecting, select the NetContacts tab.
4. Click Disable Name Table Trigger to disable triggers temporarily.
5. Import your records in iMIS Desktop: select Utilities > Data Transfer Utilities > Import Utility.
6. When the import is done, click Enable Name Table Trigger to restore the trigger.
7. Click Synchronize NetContacts to update the associated NET tables.

Purging user and contact records

DB Maintenance lets you permanently delete entries from .NET tables that were previously purged from Client/Server tables.

> **Note:** Caution! Be sure to follow the order here: complete your Client/Server membership purge before proceeding to those in DB Maintenance, and always purge user records before purging contact records.

> **Note:** Note: iMIS contact records will continue to display in search, unless the record is “Marked for deletion”. If you do not want the publishing service to include contact records that were previously deleted, but not “Marked for deletion”, you will need to delete the search Contacts folder (ASI\iMIS\indexServiceProtected\Search\Contacts), and then delete the row in the SystemConfig table that is used by contacts publishing (e.g. DELETE FROM [dbo].[SystemConfig] WHERE [ParameterName] LIKE 'ContactsPublishing-<Publishing

> Server Code>'). The Contacts folder and the SystemConfig row will be recreated automatically.

To purge membership records across iMIS

1. Purge member records in Name-related tables.

1. In iMIS Desktop, select Utilities > Reports and Queries from the menu.
2. Select Purge, Membership Purge for MS SQL and select Run. The Membership Purge is for the Name table and those tables related to it.

2. Purge user records in .NET tables.

1. In DB Maintenance, select the NetContacts tab.

   Click Purge Unused Users.

   Check the estimate for the number of records eligible for purging reported by the Purge Confirmation window, and troubleshoot if it seems wrong.

   Click Continue with Purge. The purge can take minutes or hours, depending on the number of records involved. Entries from the following .NET tables are deleted:

- aspnet_Profile
- aspnet_Membership
- aspnet_Users
- Users
- UserMain
- UserRole
- UserToken

   When the purge is done, check the history log that displays for the success and number of records that were purged.

3. Purge contact records in .NET tables.

1. Click Purge Unused Contacts.

   Check the estimate for the number of records eligible for purging reported by the Purge Confirmation window, and troubleshoot if it seems wrong.

   Click Continue with Purge. The purge can take minutes or hours, depending on the number of records involved. Entries from the following .NET tables are deleted:

- GroupMember
- GroupMemberDetail
- RFMMain
- Individual
- Institute
- ContactBiography
- ContactCommunicationReasonPreferences
- ContactLog
- ContactPicture
- ContactSalutation
- ContactMain
- PrimaryInstituteContactKey is set to null for all related institute records

  When the purge is done, check the history log that displays for the success and number of records that were purged.

  Using DB Maintenance for PCI compliance
  Depending on which option you choose in AR/Cash Setup, implementing advanced PCI Compliance support requires changes to your iMIS database, either by

- removing all existing cardholder information from your iMIS system that predates your new security measures, or

- resetting the encryption keys (including removal of previous keys) and re-encrypting cardholder data each year, as required

  DB Maintenance lets you complete these processes easily and reliably through the PCI tab.

  Precautions for using DB Maintenance

- Verify that you have a valid backup of your iMIS database before running DB Maintenance commands that modify the database.
- Ensure the database is protected from updates before modifying it, to prevent failures and data problems from changes occurring while entities are being reset/rebuilt/removed:

1. Have all users log out.

   Stop webservers from updating the database, such as by stopping the AppPool in IIS.

- While users are logged in, you can safely run Analyze Database and Table Details; however, analyzing the database can affect performance.

  To reset encryption keys and data

  To maintain PCI compliance with stored cardholder data, you must complete all of the steps below.

1. Choose a time when the database can be offline for several hours. Re-encryption can take minutes or hours, depending on your data; once started, it must not be stopped.
2. In DB Maintenance, open the PCI tab.
3. To start the purge, click Reset Encryption Key and Data. A warning prompts you to confirm the process.
4. Allow the process to complete without interruption.

   Caution! You risk data corruption if you interrupt the process or close DB Maintenance, which appears unresponsive.

   The output of the process displays in the main window of the DB Maintenance utility.

5. Click Remove Historical Encryption Keys, or, if postponing that purge, skip to the next step. (If you do the purge later, be sure to recycle the application pool then, too.)

   Caution! Once you remove previous keys, clicking on any encrypted links that have already been embedded in emails (such as "create new account" emails) will no longer work. The user will see the error "Your session has timed out. Please try your operation again".

6. Recycle the IIS Application Pool (iMISApp AppPool) for each application server that uses this database.

   To purge cardholder data

   > **Note:** Important: If you implement PCI Compliance with audit logging and later switch to storing no data, be aware that this purge routine leaves the existing audit log (PciAuditLog table) intact.

   Deferred transactions are lost in a purge, so you need to resolve deferred data and disable settings that allow it.

1. Find and change any gateway that is configured for Deferred Authorization:

- In iMIS Desktop, open AR/Cash > Set up module and select Credit Card Auth.
- Under Current Accounts, select the first gateway listed.
- If it is set to Deferred Authorization, change it to Immediate or Manual Authorization.
- Repeat for all other gateways.

2. Submit any deferred transactions that are pending: In iMIS Desktop, open AR/Cash > Credit card reporting and run Print Deferred Pre-authorization Report and Submit Deferred Authorizations. Any deferred transaction remaining after the purge has no payment information, so it must be re-entered manually.
3. In DB Maintenance, open the PCI tab.

4. To start the purge, click Purge All Cardholder Information. A query runs and the Purge Payment Card Information window opens, reporting the number of records with cardholder information in each table that will be cleared by the purge.
5. If the report surfaces no problems and you want to complete the purge, select Continue with Purge to clear the cardholder information from the database.

   The output of the process displays in the main window of the DB Maintenance utility.

   Fields affected by the purge

   Table: [dbo].[ASI_temp_trans] if exists

- [CC_NUMBER] - masked (shows last 4)
- [CC_EXPIRE] - masked
- [CC_NAME] - cleared

  Table: [dbo].[Trans]

- [CC_NUMBER] - masked (shows last 4)
- [CC_EXPIRE] - masked
- [CC_NAME] - cleared
- [ENCRYPT_CC_NUMBER] - cleared
- [ENCRYPT_CC_EXPIRE] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

  Table: [dbo].[Orders]

- [PAY_NUMBER] - masked (shows last 4)
- [CREDIT_CARD_EXPIRES] - masked
- [CREDIT_CARD_NAME] - cleared

- [ENCRYPT_PAY_NUMBER] - cleared
- [ENCRYPT_CREDIT_CARD_EXPIRES] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Table: [dbo].[Basket_Payment]

- [PAY_NUMBER] - masked (shows last 4)
- [CREDIT_CARD_EXPIRES] - masked
- [CREDIT_CARD_NAME] - cleared
- [ENCRYPT_CREDIT_CARD_EXPIRES] - cleared
- [ENCRYPT_PAY_NUMBER] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Table: [dbo].[Order_Payments]

- [PAY_NUMBER] - masked (shows last 4)
- [CREDIT_CARD_EXPIRES] - masked
- [CREDIT_CARD_NAME] - cleared
- [ENCRYPT_CREDIT_CARD_EXPIRES] - cleared
- [ENCRYPT_PAY_NUMBER] - cleared
- [ENCRYPT_CSC] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Table: [dbo].[OrderCheckout]

- [CreditCardNumber] - masked (shows last 4)
- [CreditCardExpiration] - masked
- [CreditCardName] - cleared
- [CreditCardAddress] - cleared
- [CreditCardAddress2] - cleared
- [CreditCardAddress3] - cleared
- [CreditCardCity] - cleared
- [CreditCardState] - cleared
- [CreditCardPostalCode] - cleared
- [CreditCardCountry] - cleared
- [ISSUE_DATE] - cleared
- [ISSUE_NUMBER] - cleared

Creating NRDS items

(NRDS clients only)The National Association of REALTORS® (NRDS) bridge lets you share information between iMIS and NRDS through an automatic synchronization of changes made in either database. Setting up this data sharing includes a one-time command in DB Maintenance to create the needed items:

1. After downloading and installing the WebSphere MQ Client, restart you application server.
2. In DB Maintenance, select the NRDS tab and click Add NRDS Items.
3. Check the Output section below the button to verify that no errors occurred.

   For complete setup and configuration details, see NRDS bridge for data synchronization.

Converting to VAT Inclusive

(VAT organizations only) If you entered product and event pricing in iMIS 15.2.5 and earlier, it was exclusive of VAT. If you now enable VAT Inclusive pricing, you need to do a one-time conversion of your existing pricing to include the VAT tax amount.

See Configuring VAT options in AR/Cash. When you enable the option in AR/Cash, iMIS prompts you to run this conversion.

> **Note:** Caution: Always back up your database and ensure that you can restore it before running any data conversion.

Upgrade note for VAT: Now that iMIS stores all order and order line amounts as VAT-inclusive, DB Upgrader takes care of updating all of your existing order data to be consistent with your new order data. Flags on the record ensure that the update occurs only once, and your original data is backed up (Orders_BAK and Order_Lines_BAK). Note that this universal change to storing order amounts as VAT-inclusive is unrelated to whether you set AR/Cash VAT Options to be VAT Exclusive.

Maintaining iParts with DB Maintenance

When you click Manage Panel Editor Sources, the following window is displayed:

The source name is displayed in the first column. Then in the following columns, other information is displayed:

- Is Dynamic Source: This column indicates whether the source is a dynamic source (for example, created by Panel Editor), or a static source (for example, just a business object that Panel Editor is able to use).

- Is Single Row Source: This column whether the source is a single-row source (for example, there is one row for each contact), or a multi-instance source (for example, there are multiple rows for each contact).

  The check-boxes allow you to filter the list down to only what you're interested in.

  Click Add Static Source to add another source. For example, if you create a new business object that has an ID and represents data associated with Contacts, you can add the source here. This adds a row to the ObjectMetaData table.

  Click Remove Static Source if you have a business object (non-dynamic source) selected. This allows you to remove business objects to which you don't want Panel Editor have access. If the selection is a dynamic source, the button reads Purge Dynamic Source instead.

  If you click Remove Static Source, the following confirmation dialog is displayed:

  Click Yes to remove the associated row from the ObjectMetaData table. The source is no longer available to Panel Editor. No data is destroyed, and the source can be re-added using the Add Static Source button.

  If you click Purge Dynamic Source, the following confirmation dialog is displayed:

  If you click Purge Data Source while the checkbox is unselected, the dynamic data source is removed from the ObjectMetaData table. The dynamic source will no longer be available to Panel Editor to create new panel editor instances. However, the backing Business Object, View, and Data are all untouched. There is currently no way to restore access to a purge dynamic data source in this state, except for re-adding the row manually through SQL. Any panel editors currently using the source should continue to work, but might not be editable.

  If the checkbox is selected, then a red warning is displayed:

  Selecting this option will also delete the backing Business Object documents, drop the View, and delete all associated Data. This is useful when performing testing, and you have a number of test objects you want to remove.

Note: Note: Any Panel Editors using the source will break, and it's the responsibility of the customer to ensure that no Panel Editors are using the source when it is purged.

ANSI Conversion Utility - ConvertTableToANSI

iMIS Desktop requires ANSI settings to be enabled at all times. Whenever Desktop creates a connection (ODBC or otherwise), it does so with all ANSI options turned ON. To ensure that that the entire iMIS database has the correct ANSI settings, the upgrade utility rebuilds all tables and recreates all stored procedures, triggers, functions, and views.

Note: Note: Because of this extensive rebuilding, expect upgrading to be significantly slower for very large databases. Before upgrading, check that you have ample free disk space relative to the size of your database, as these tables will be copied during the process of conversion and rebuilding.

ANSI settings required by iMIS

iMIS requires that all tables be fully ANSI compliant, so they must be created with SET ANSI_NULLS ON and SET ANSI_PADDING ON. The ConvertTablesToANSI command-line utility rebuilds every table in the database that is not ANSI compliant, including user-defined and third-party tables.

If you are creating your own tables, procedures, triggers, views, etc., be sure to set these ANSI settings:

SET ANSI_DEFAULTS ON

SET IMPLICIT_TRANSACTIONS OFF

SET CONCAT_NULL_YIELDS_NULL ON

SET ARITHABORT ON

SET NUMERIC_ROUNDABORT OFF

Running a standalone ANSI conversion

The DB Upgrader runs the ConvertTablesToANSI utility as part of an iMIS upgrade, but you can run it standalone as well, from the command line. To ensure a smooth upgrade for a large and complex database, you can do a "pre-upgrade" conversion on a backup of the database to anticipate problems.

1. Create a backup, an off-line copy of your database.
2. If you haven't upgraded, run the iMIS installer to expand copies of the database utilities.
3. Locate the ConvertTablesToANSI utility, in the imis.net\IMISDBUpgrade\Utilities folder.
4. From the command line, run the utility against your database backup:

   ConvertTablesToANSI.exe -S sqlServerName -U sqlUser -P sqlPassword -D dbName

   If your database copy converts with no errors, you can use this converted database for your upgrade, which saves the time of reconverting. If there is an error, contact Support for assistance before upgrading.

Troubleshooting ANSI Conversion errors

The ANSI conversion utility rebuilds every table that is not ANSI compliant. These tables are listed in the upgrade log:

Rebuilding Tables For Full ANSI Compliance ...

Converting Table 1 of 89: Activity

…

Converting Table 88 of 89: UserMain

Converting Table 89 of 89: W_Reports

ANSI Conversion Successful

Step 4 Done.

The total number of tables rebuilt varies by database. Any errors appear the build log, flagged with three asterisks (***), before both the description of the problem and the end of the step:

Converting Table 219 of 234: UsedSourceCode

*** Unable to copy data into table UsedSourceCode

…

Converting Table 234 of 234: tempTypeNamesList

*** Errors during ANSI Conversion

Step 4 Done.

After such an error, the upgrade continues. Although the completed upgrade reports being "failed", the upgrade will be valid as long as there are no other errors. When a table fails to convert, the utility restores it to its original, unconverted condition, unless connectivity to the database is lost.

Duplicate Merge Manager

Duplicate Merge Manager overview

Duplicate Merge Manager allows you to merge multiple duplicate records under one ID that is selected as the Retain ID. Duplicate Merge Manager locates all potential duplicate records and organizes them into duplicate groups. You can manage these groups to determine which Name and Name_Address records to retain, which records to merge into the retained records, and which records to delete. After you have managed the groups, you can run merge or delete the selected records.

Duplicate Merge Manager performs the following procedures:

- Deletes the records marked for deletion.
- Copies into the Retain ID the subordinate records that are marked for merging.
- Assigns the correct addresses to the Retain ID.

Important: DMM will not merge any data from .NET tables (other than ContactMain and UserMain). Merging contact records that have associated .NET records may result in orphaned records. Examples include (but not limited to):

- DocumentMain.CreatedByUserKey
- DocumentMain.UpdatedByUserKey
- GroupMain.MemberContactKey

Requirements

- Make sure to add the Duplicate Merge Manager license key to the System Setup window.
- Make sure to grant sufficient access control. See Access control: Customers in the Security Administration section.

Duplicate Merge Manager terms

The following is a list of terms used with DMM.

- Duplicate Match Key – Parameter used to check for duplicate records.
- Group – When potential duplicate records are found, they are organized into groups to manage the records.
- Retain ID – ID of the customer record to be retained from the selected group.
- IDs to Merge – List of IDs to be merged and then deleted.
- IDs to Delete – List of IDs to be deleted.
- IDs to Keep – List of IDs to keep “as is” (these are not duplicate records).

Generated file layouts

The following tables are part of the iMIS database:

Duplicate_Group (stores information regarding actions to take for the group)

SEQN	Long	Primary key
DUP_MATCH_KEY	varchar(255)	Duplicate field values
MERGE_NOTE	varchar(255)	Notes to be stored in merged Activity Records
PREF_MAIL	Integer	Address for preferred mailing
PREF_BILL	Integer	Address for preferred billing
MERGE_IDS	varchar(255)	Comma delimited IDs to be merged
DELETE_IDS	varchar(255)	Comma delimited IDs to be deleted
KEEP_IDS	varchar(255)	Comma delimited IDs to keep unchanged
ADDR_1_NUM	Integer	Main Address to be retained
ADDR_2_NUM	Integer	Second Address to be retained
ADDR_3_NUM	Integer	Third Address to be retained
RETAIN_ID	varchar(12)	ID of the record to retain

Duplicate (stores information regarding each duplicate ID)

SEQN	Numeric	Related Key to Duplicate_Group

ID	varchar(12)	Name ID
FULL_NAME	varchar(50)	Name FULL_NAME
ADDR_1	Integer	Main Address of ID
ADDR_2	Integer	Second Address of ID
ADDR_3	Integer	Third Address of ID

Specifying an alternate data source

To use Duplicate Merge Manager with a data source other than the one that was in use the last time iMIS was started, you must specify the Data Source Name in the Local Preferences window.

1. Open iMIS and click Cancel when the log on window opens.
2. Select Logon > Set Host Location. The Local Preferences window displays.
3. Click Edit and enter the desired Application Servers exactly as shown in the ODBC configuration.
4. Click OK.
5. Select Logon > Logon to Host to display the iMIS Log On window.
6. Enter your User ID and Password and click OK to start iMIS.

Index on ID field

User-defined tables used in Find Duplicates, Manage Groups, and Choose Columns are required to have an index on the ID field. See your system administrator for further details.

Using Duplicate Merge Manager

The Duplicate Merge Manager window is used to find, select, merge, delete, or keep possible duplicate records.

You must have a Customers authorization level of 4 (select File> System Setup and click User Passwords) to use the Duplicate Merge Manager.

- From Customers, select Manage duplicates to display the Duplicate Merge Manager window.

  Multiple-user functionality is achieved through the use of temporary and permanent tables. Duplicate groups that are found, managed, and merged while using Duplicate Merge Manager without being saved to the permanent tables for use during a later Duplicate Merge Manager session are referred to as the current session. There is a set of temporary tables for each Duplicate Merge Manager user so that each user can perform duplicate group tasks individually. The following temporary tables are created when a Duplicate Merge Manager session is started, and are deleted when the session is closed:

- ##Duplicate_hh_mm_ss_ms
- ##Duplicate_Group_hh_mm_ss_ms
- ##Duplicate_Keys_hh_mm_ss_ms

  Each temporary table is exclusive to the individual user's current Duplicate Merge Manager session and is named using a unique, variable timestamp in the format hh_mm_ss_ms, where hh is hours, mm is minutes, ss is seconds, and ms is milliseconds. The data in the temporary tables is overwritten each time the Find Duplicates process is run.

  Duplicate groups stored in the temporary tables can be managed and merged in the current Duplicate Merge Manager session, or the groups can be saved to the permanent tables so that the groups can be managed and merged in a later Duplicate Merge Manager session. Any duplicate groups that are not saved to the permanent tables will no longer exist when the current Duplicate Merge Manager session is ended.

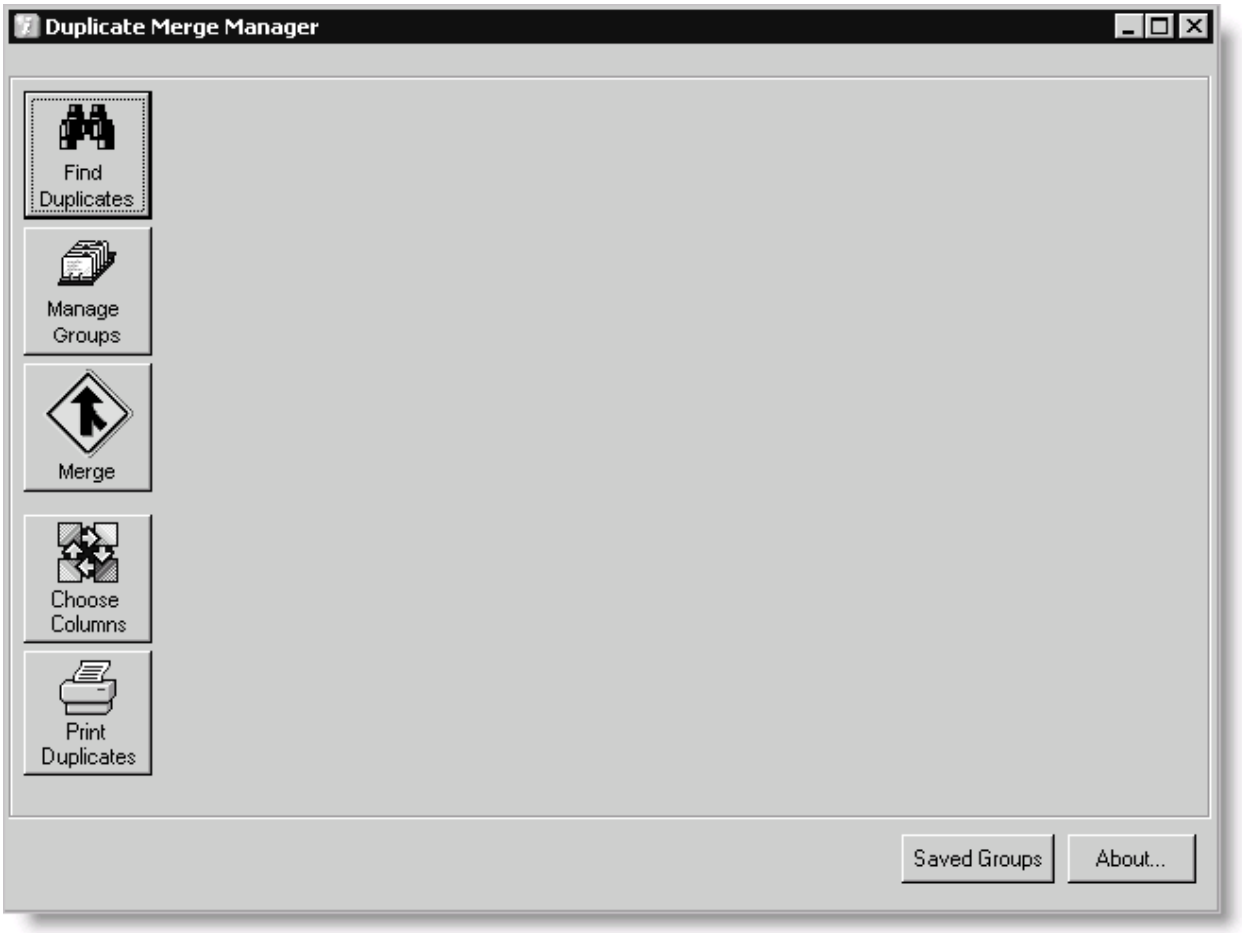
  When a duplicate group is saved, the group data is moved from the temporary tables to the following permanent tables:

- Duplicate
- Duplicate_Group

  The merge actions for saved duplicate groups are performed in the order that the groups were saved. Because of Duplicate Merge Manager's multiple-user functionality, it is

possible for two or more users to create multiple duplicate groups during their own Duplicate Merge Manager sessions that contain one or more of the same IDs. If more than one duplicate group contains the same ID when a Merge operation is performed, the merge actions for the second group (and any subsequent groups) may not be performed completely. For example, if the Retain ID for the second group was deleted during the merge actions for the first group, the merge actions for the second group (which contains the previously deleted Retain ID) will not be performed. You should review all saved duplicate groups for accuracy and any conflicts before performing the Merge operation.

Duplicate Merge Manager window



From Customers, select Manage duplicates

Find Duplicates button

Used to access the Find Duplicates options. You can use the current DupMatchKey field in iMIS to find possible duplicate records, specify a new set of criteria for finding possible duplicate records, or specify two known IDs to merge.

Manage Groups button

Used to display the Group and Action tabs.

Group tab

Select this tab to view the groups and records within the duplicate groups that have been created. The group includes the individuals associated with each group, and each individual's associated name and address information. The Status column indicates whether the duplicate record can be deleted (OK) or the reason why the record cannot be deleted.

To view more information about the individual records in a group, click Choose Columns to select additional fields or columns to display.

Action tab

After viewing the records in a duplicate group, select the Action tab. This tab allows you to select the Retain ID, the records that should be kept unchanged, the records that should be merged into the Retain ID, the records that should be deleted, the addresses to keep, and the addresses to use for preferred mailing and preferred billing. If you save a duplicate group to the permanent tables without specifying any actions for the group, the records in the group are not changed and the duplicate group still exists after a merge operation is performed.

Merge button

Used to run the merge procedure after you have determined which records are to be retained, merged, and deleted.

Choose Columns button

Used to select additional fields for viewing in order to evaluate possible duplicate records within a group.

Print Duplicates button

Used to print the iMIS Duplicate Merge Manager – Duplicate Group List, which lists the SEQN, Dup_Match_Key fields, and Retain ID.

Note: Clicking this button will print the iMIS Duplicate Merge Manager – Duplicate Group List, regardless of the setting specified on the Report Destination window.

Saved Groups button

Used to load the duplicate groups that were saved to the permanent tables during Duplicate Merge Manager sessions. You can then manage and merge these groups, as well as continue to find, manage, and merge new duplicate groups. Duplicate groups found and saved in previous sessions are not accessible until you click Saved Groups.

About button

Used to display the About DMM window. Duplicate Merge Manager version information displays in this window.

Identifying potential duplicate records

There are three options available for creating duplicate record groups:

- Use DUP_MATCH_KEY from Name Table
- Select fields which will be used to identify potential duplicates
- Specify two known IDs to Merge option to directly merge two IDs

Status column

For all options, the initial table of information about the potential duplicates includes the Status column, which contains either OK or reasons why a record cannot be discarded. The following table describes the reasons.

This record cannot be deleted while an open order exists	An open Order is associated with this Contact.
This record cannot be deleted while an invoice with a non-zero balance exists	An open Invoice is associated with this Contact.

This record cannot be deleted while an active subscription exists	An active Subscription record is associated with this Contact.
This record cannot be deleted while a dependent referral record exists	A Referral record dependency is associated with this Contact.
This record cannot be deleted while a dependent Name_Fin record exists with this ID as the Bill To ID	This Contact is designated as the Bill To on the Name_Fin record for another Contact.
This record cannot be deleted while a dependent Name record exists with this ID as the Bill To ID	This Contact is designated as the Bill To on the Name record for another Contact.
This record cannot be deleted while a dependent Name record exists with this ID as the Company ID	This Contact is designated as the Company on the Name record for another Contact.

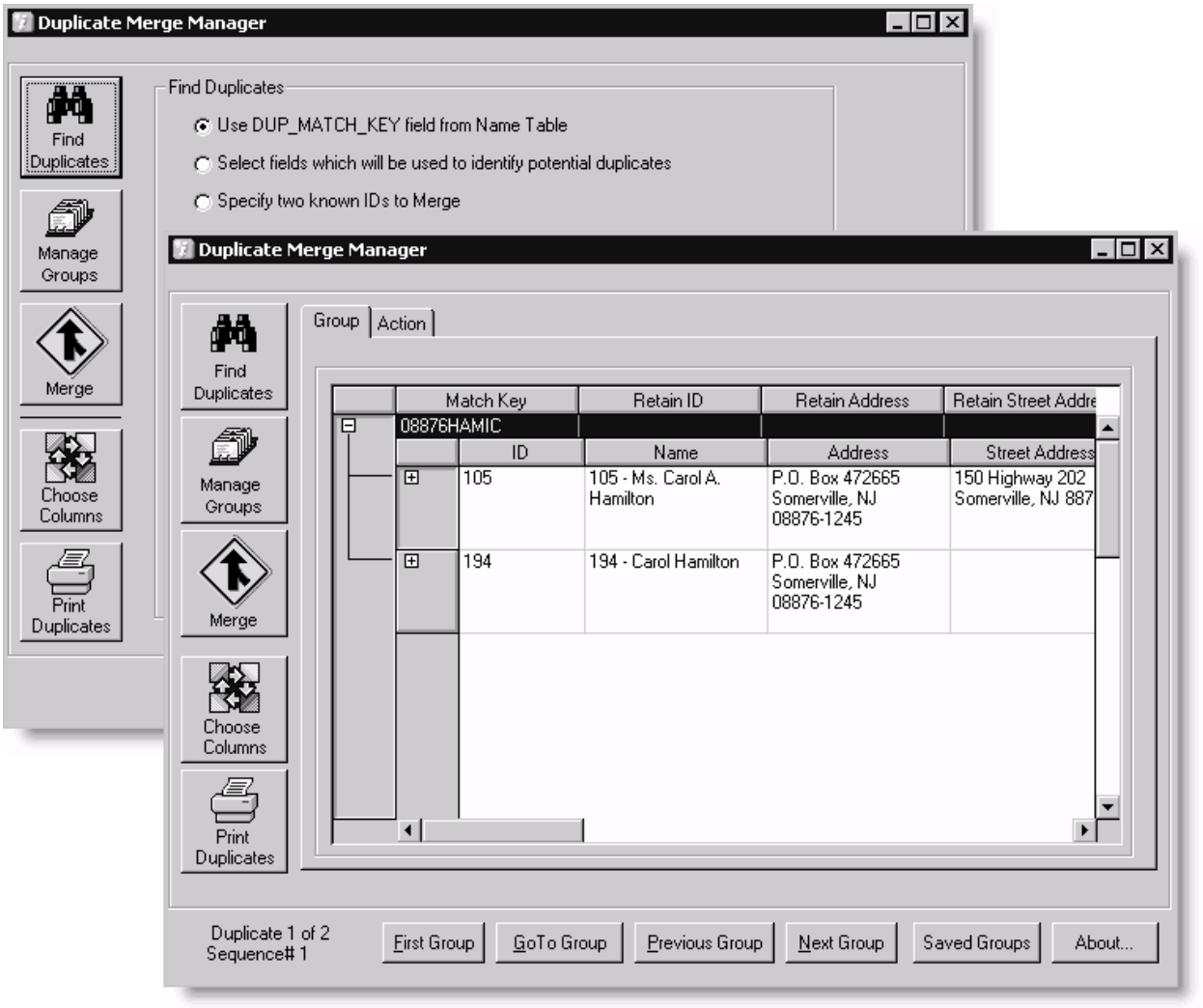
To find possible duplicate records using the DUP_MATCH_KEY field

Select the Use DUP_MATCH_KEY field from Name Table option to find all possible duplicates based upon the value in the Name.DUP_MATCH_KEY field, which contains the value that was calculated based on the Duplicate Record Check Formula field in the Customer Setup – Advanced window at the time the customer record was added or last edited. If the Duplicate Record Check Formula field was blank when the customer record was added or last edited, iMIS uses the default formula (the first five characters of the preferred mail address zip code, the first four characters of the last name, and the first character of the first name) to populate the Name.DUP_MATCH_KEY field.

Note: When the Duplicate Record Check Formula is changed, iMIS does not go back and recalculate the Name.DUP_MATCH_KEY field for existing customer records. The Name.DUP_MATCH_KEY field is initially populated when a new customer record is added, and is updated when the customer record is edited in the Manage customers window.

1. From Customers, select Manage duplicates.

2. Click Find Duplicates. The Find Duplicates options display on the Duplicate Merge Manager window.
3. Click Build Tables. A message displays informing you that the process may take from 2 to 20 minutes.
4. Click Yes. The first duplicate group found displays on the Group tab in the Manage Groups view on the Duplicate Merge Manager window. As you review the groups, the Duplicate x of y and Sequence# information displayed in the lower left corner of the window will update.
5. If no duplicate groups are found, a message displays indicating that no duplicate groups were found.



To find possible duplicate records using selected fields

Select the Select fields which will be used to identify potential duplicates option to specify your own criteria to find duplicate matches. This option overrides the value entered in each customer's Name.DUP_MATCH_KEY field, but does not update the Name.DUP_MATCH_KEY field in iMIS. You must choose at least one field from the Name table. For the best performance results, select the most unique fields first.

The Name.WORK_PHONE and Name.HOME_PHONE fields can be selected for display. Click Choose Columns on the Duplicate Merge Manager window.

1. From Customers, select Manage duplicates.
2. Click Find Duplicates. The Find Duplicates options display.
3. Select the Select fields which will be used to identify potential duplicates option. The Name table and any user-defined tables display in the Tables area.
4. Click the + symbol displayed to the left of the table name to expand the table and view all available fields.

   Note: You must choose at least one field from the Name table.
5. Select the desired field using one of the following methods:

- Double-click the field.
- Select the field and click >.
- Drag and drop the field onto the grid on the right side of the window.

Note: To remove a field so that it is not used when searching for potential duplicates, double-click the field or select the field and click <.

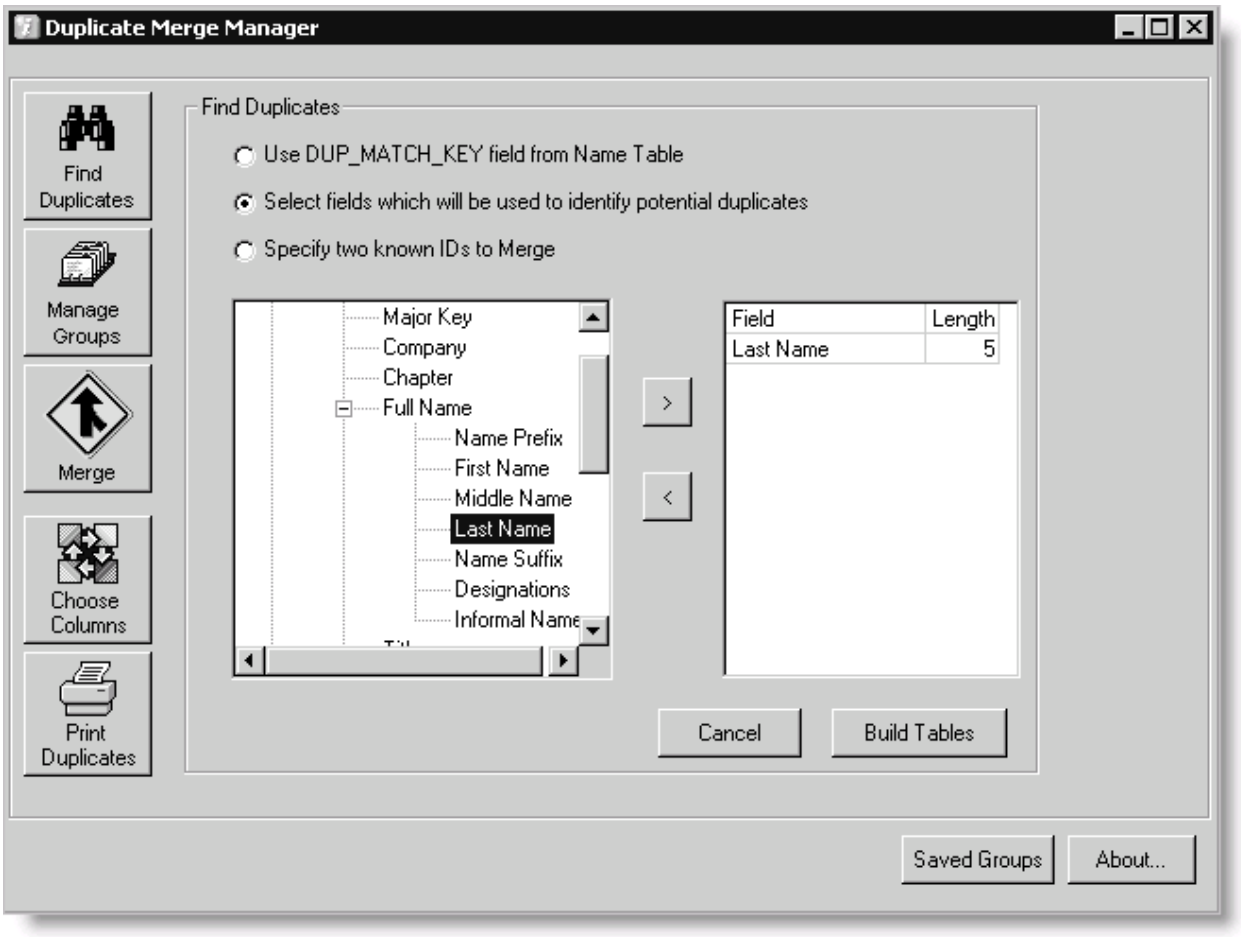
Note: For performance reasons, you should select the most unique field first and then select the remaining fields in descending order based on their uniqueness.

6. After the field displays on the selection grid on the right side of the window, click the corresponding Length cell and enter the number of characters to be used for the comparison.

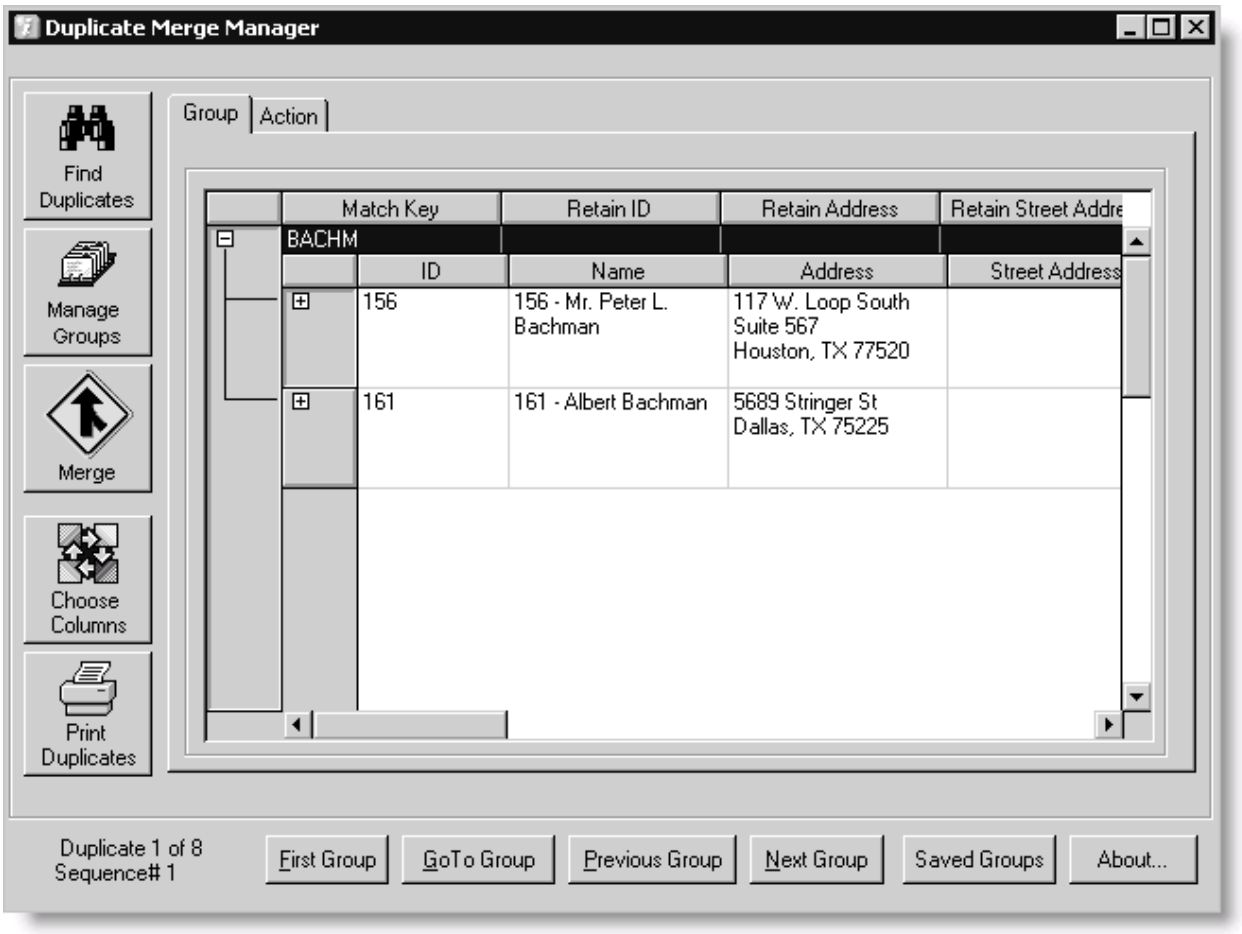
- A message displays if the length is not entered or if a non-numeric length is entered. Click OK and specify the Length.

  Note: If you decrease the number of characters used for the duplicate search, the match key is rebuilt. However, if you increase the number of characters used for the duplicate search, the match key is not rebuilt and the minimum number of characters previously specified is still used for the match key. To increase the number of characters used for the duplicate search, deselect the field, add the field back and specify the number of characters to be used for the duplicate search.

7. A message displays if the length is not entered or if a non-numeric length is entered. Click OK and specify the Length.
8. Repeat the process to create additional fields.
9. Click Build Tables. A message displays informing you that the process may take from 2 to 20 minutes.
   - If you click Build Tables before selecting any fields, a message displays informing you that you must select at least one field to identify duplicates. Click OK, select one or more fields and specify the Length for each field, and click Build Tables.
10. Click Yes. The first duplicate group found displays on the Group tab in the Manage Groups view on the Duplicate Merge Manager window. As you review the groups, the Duplicate x of y and Sequence# information displayed in the lower left corner of the window will update.
11. If no duplicate groups are found, a message displays indicating that no duplicates were found. Click OK.



In this example, DMM will search for all Name records in which the first five characters of LAST_NAME are identical. Records with the same criteria value or match key will be grouped together.



To directly merge two known IDs

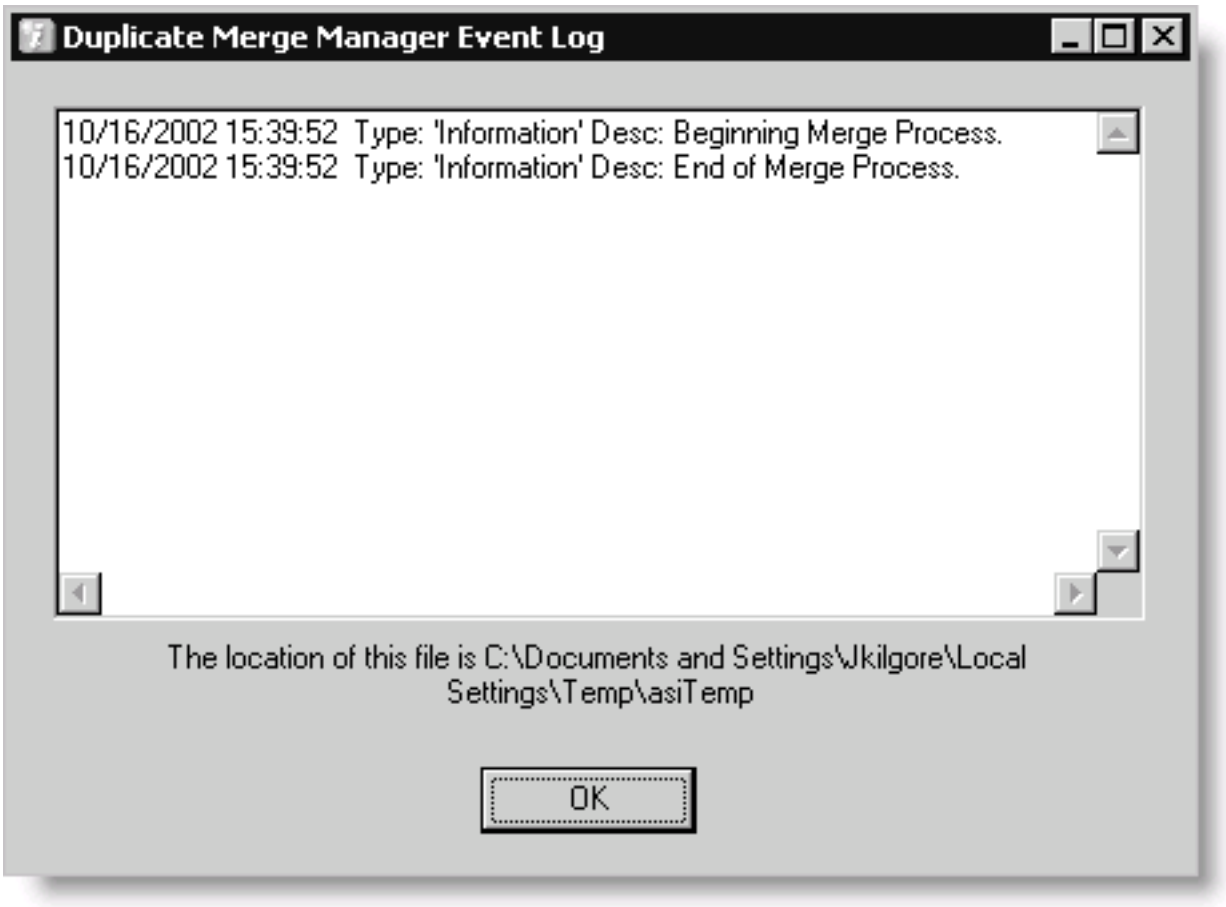
To skip the process of searching for possible duplicate records and directly merge two records which are known to be duplicates, you can use the Specify two known IDs to Merge option in the Find Duplicates view of the Duplicate Merge Manager window. See To Merge Two Known IDs.

To remove a duplicate group

You can delete a previously saved duplicate group without affecting any customer records in the group. This process involves viewing the Action tab for the group to be deleted, selecting any ID as the Retain ID, and moving all of the other IDs to the IDs to Keep list. When the Merge process is run, the duplicate group will be removed and the only changes that will be made to any of the customer records in the group are the Preferred Mail and Preferred Bill settings (if these settings have been changed).

1. From Customers, select Manage duplicates.
2. Click Saved Groups to display the Manage Groups view on the Duplicate Merge Manager window.
3. Click Find Group, GoTo Group, Previous Group, or Next Group to select the duplicate group to be removed.
4. Select the Action tab.
5. Select a Retain ID from the drop-down list of available duplicate record IDs.

   Note: Any ID can be selected as the Retain ID since no customer records in this duplicate group will be merged or deleted.
6. Select the Preferred Mail option for the Address, Street Address, or Home Address for the Retain ID.
7. Select the Preferred Bill option for the Address, Street Address, or Home Address for the Retain ID.
8. Move all of the IDs from the IDs to Merge list to the IDs to Keep list. The IDs in the IDs to Keep list will be ignored during the Merge process.
9. Move all of the IDs from the IDs to Delete list to the IDs to Keep list. The IDs in the IDs to Keep list will be ignored during the Merge process.
10. Click Save.
11. Click First Group, GoTo Group, Previous Group, or Next Group to view all other previously saved groups to confirm that any specified actions for these groups are correct.
12. Click Merge. A confirmation message displays indicating how many duplicate groups have been defined for merging.
13. Click Yes. When the Merge process has completed, a message displays indicating how many duplicate groups were processed.
14. Click Yes to view the event log, or click No to skip viewing the event log. If you click Yes, an event log displays.



Viewing duplicate groups

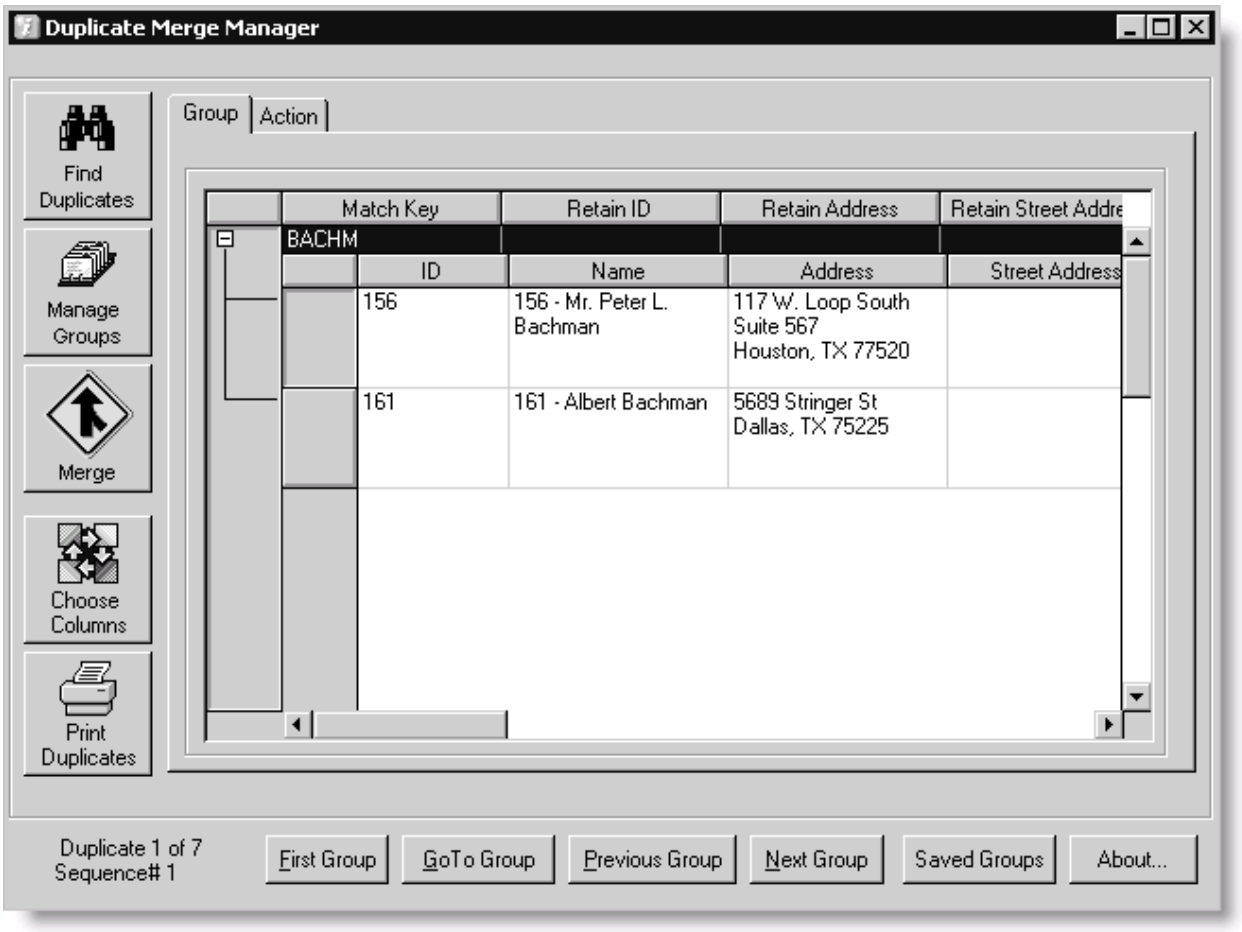
For performance reasons, the grid displays each duplicate group and its corresponding MatchKey one at a time. Compare the information from each individual record in the duplicate group to determine which ID to use as the Retain ID and which records should be kept, merged into the retained record, or deleted.

Duplicate Merge Manager uses temporary and permanent tables to store information on duplicate groups and the actions to be performed for these groups. When you run the Find Duplicates process, the results are stored in temporary tables. If you run the Find Duplicates process again or close the Duplicate Merge Manager session, this information is lost. The sequence numbers in the temporary tables are reset to begin at 1 and are reused each time the Find Duplicates process is run.

To save the information for a duplicate group, while viewing the group on the Action tab on the Manage Groups view of the Duplicate Merge Manager window, click Save. The group information and any specified actions are saved to the DMM permanent tables. The saved group information and specified actions can be recalled later by clicking Saved Groups and these groups can then be managed and merged.

When you save duplicate group information, the group is assigned a sequence number. This sequence number is permanent and does not change when Duplicate Merge Manager is closed and then restarted. Sequence numbers are never re-used, even after the duplicate group which was assigned the sequence number has been merged and no longer exists. For example, if you run the Find Duplicates process and duplicate groups 1 through 5 are returned, these groups are stored in the temporary tables as sequences 1 through 5. If you manage group 5 and save this group, a message displays informing you of the group's new sequence number (in the permanent tables). If the group's new sequence number is 17, it retains this sequence number when Duplicate Merge Manager is closed and then restarted. After all saved groups have been merged, the sequence numbers in the permanent tables do not restart at 1, but continue to increment. For example, if the last saved group was assigned sequence number 17 and all saved groups have been merged, the next group you save will be assigned the sequence number 18.

Group tab in Manage Groups view on Duplicate Merge Manager window



From Customers, select Manage duplicates, click Manage Groups, and select the Group tab. In this example, the Find Duplicates process found a total of seven possible duplicate groups. The first group is displayed.

Group tab

Select this tab to view the groups and records within the groups you have created. The group includes the records associated with each group and the name and address information for each record. To view more information about the individual records in a group, click Choose Columns and select the additional fields or columns to display.

Action tab

After viewing the records in a duplicate group, select the Action tab to select the record to retain, the addresses to keep, the addresses to use for preferred mailing and preferred

billing, the records to merge into the retained record, and the records to delete. The records in a duplicate group can also be retained without any changes.

Duplicate y of z

(read only) Displays the number of the currently displayed group (y) and the total number of duplicate groups (z).

Sequence#

(read only) Displays the sequence number of the currently displayed group.

First Group button

Displays the first duplicate group.

Go To Group button

Displays the DMM GoTo Sequence Number window, where you can enter the sequence number of a duplicate group to review.

Previous Group button

Displays the previous duplicate group.

Next Group button

Displays the next duplicate group.

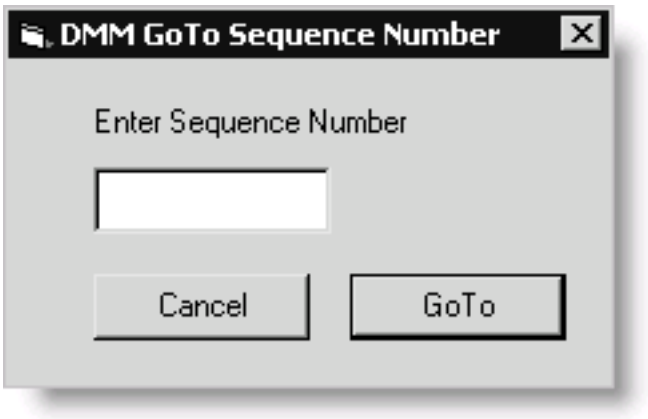
Saved Groups button

Used to load the duplicate groups that were saved to the permanent tables during the current or previous Duplicate Merge Manager sessions. You can then manage and merge these groups, as well as continue to find, manage, and merge new duplicate groups. Duplicate groups found and saved in previous Duplicate Merge Manager sessions are not accessible until you click the Saved Groups button.

About button

Used to display the About DMM window. Duplicate Merge Manager version information displays in this window.

DMM GoTo Sequence Number window



Click Manage Groups and click GoTo Group

Enter Sequence Number

Enter the sequence number of the duplicate group to review.

GoTo button

Used to display the specified duplicate group.

If the specified duplicate group does not exist, a message displays stating that there are no more Duplicate Groups to display.

To find specific duplicate groups

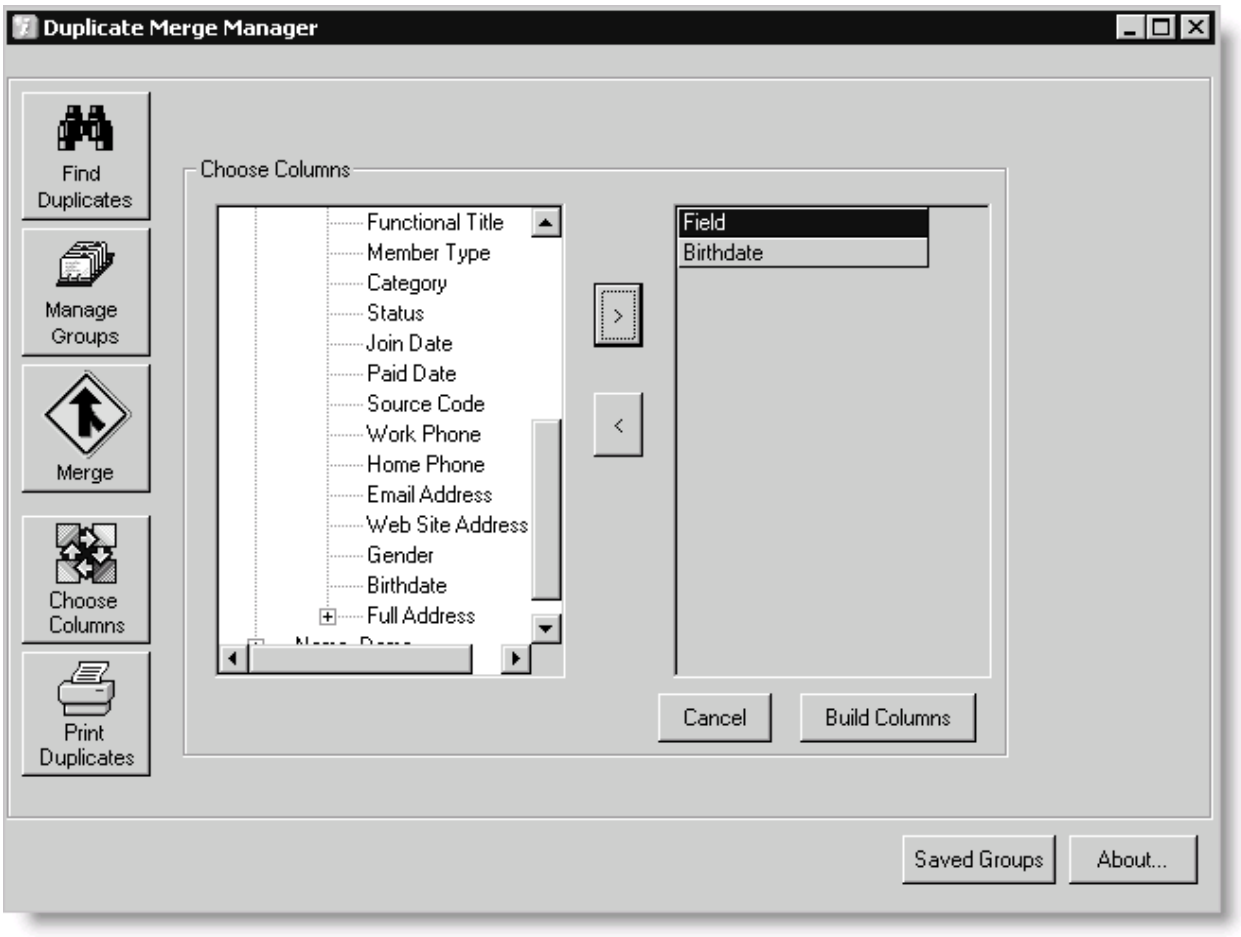
1. From the Manage Groups view on the Duplicate Merge Manager window, click GoTo Group to display the DMM GoTo Sequence Number window.
2. Enter the sequence number of the duplicate group to review in the Enter Sequence Number field.

- If a non-numeric value is entered, a message displays indicating that the sequence number must be numeric. Click OK and enter the sequence number.

3. Click GoTo to display the duplicate group.

- If the group does not exist, a message displays indicating that there are no duplicate groups to display. Click OK, enter the correct sequence number, and click GoTo.

Choose Columns view on Duplicate Merge Manager window



From Customers, select Manage duplicates, and then select Choose Columns

Choose Columns

Select the additional record fields to display on the Group tab on the Manage Groups view of the Duplicate Merge Manager window from this list. If a + symbol is displayed to the left of the table name, click the + symbol to expand the table and view all available fields.

Note: The Name.WORK_PHONE and Name.HOME_PHONE fields can be selected for display.

Note: User-defined tables used in Find Duplicates, Manage Groups, and Choose Columns must have an index on the ID field.

Field

To display a record field on the Group tab on the Manage Groups view of the Duplicate Merge Manager window, select the field in the Choose Columns list and copy it to the Field list using one of the following methods:

- Double-click the field.
- Select the field and click >.
- Drag and drop the field onto the grid on the right side of the window.

Cancel button

Used to cancel the selections you have made on the Choose Columns view and display the Duplicate Merge Manager window.

Build Columns button

Used to save your record field display selections. Your selections are saved and will be used when viewing records on the Group tab on the Manage Groups view of the Duplicate Merge Manager window until you specify a different set of selections on the Choose Columns view of the Duplicate Merge Manager window and click Build Columns again. (The specified set of Choose Columns selections are retained when the Duplicate Merge Manager is closed and then restarted.)

Saved Groups button

Used to load the duplicate groups that were saved to the permanent tables during the current or previous Duplicate Merge Manager sessions. You can then manage and merge these groups, as well as continue to find, manage, and merge new duplicate groups. Duplicate groups found and saved in previous Duplicate Merge Manager sessions are not accessible until you click the Saved Groups button.

To view additional fields in individual duplicate records

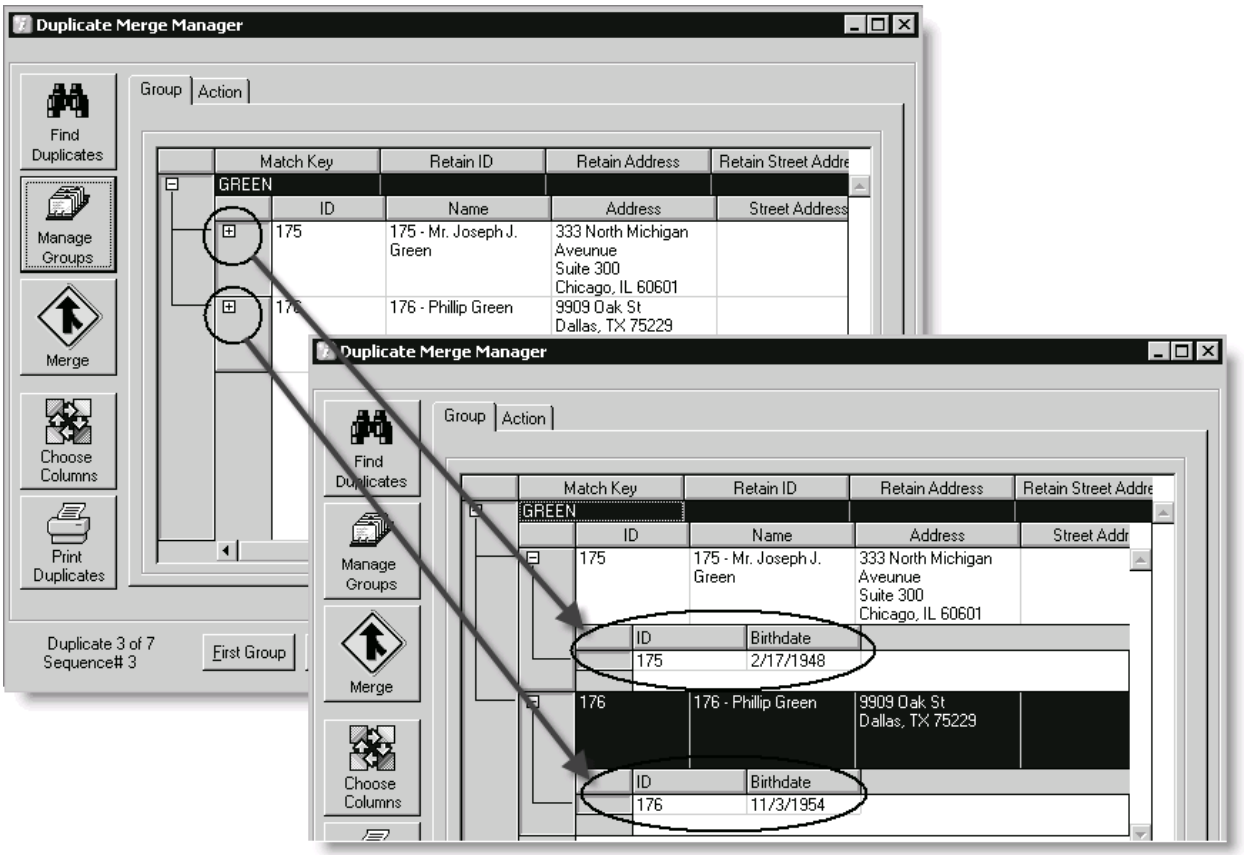
You can view other record fields in addition to the name and address fields.

1. Click Choose Columns to select additional columns to display in the individual grids.

2. Select the additional field to view using one of the following methods:

- Double-click the field.
- Select the field and click >.
- Drag and drop the field onto the grid on the right side of the window.

3. Repeat the process to view additional fields.
4. Click Build Columns to store the selected fields in the iMIS System_Params table with the ParameterName value of DuplicateMergeFields. A message displays indicating that your selected columns have been saved.
5. Click OK.
6. Click Manage Groups to display the Manage Groups view on the Duplicate Merge Manager window. The + button displayed to the left of the ID column indicates that additional fields were selected:
7. When you click the + button displayed to the left of the ID column, the additional fields expand so that they can be viewed.



Note: If you click Choose Columns again, the previously selected fields are not saved. You can select different fields to display, or click Cancel to retain the previously selected fields.

Note: When you select a different duplicate group to view or click Manage Groups again, the new fields you selected can be viewed for each record by clicking the + button displayed to the left of the ID column.

Note: The name of the table associated with each Chapter is displayed in a legend at the bottom of the grid area.

To print the Duplicate Group List

You can print the list of duplicate groups, which lists the sequence number, Match Key, and Retain ID (if a Retain ID is specified) for each current duplicate group. The user must have a Customers authorization level of 8 to print the Duplicate Group List.

The duplicate groups you are currently viewing, whether the result of running the Find Duplicates process or of clicking Saved Groups, are printed on the Duplicate Group List.

- Click Print Duplicates on the Duplicate Merge Manager window to print the Duplicate Group List.

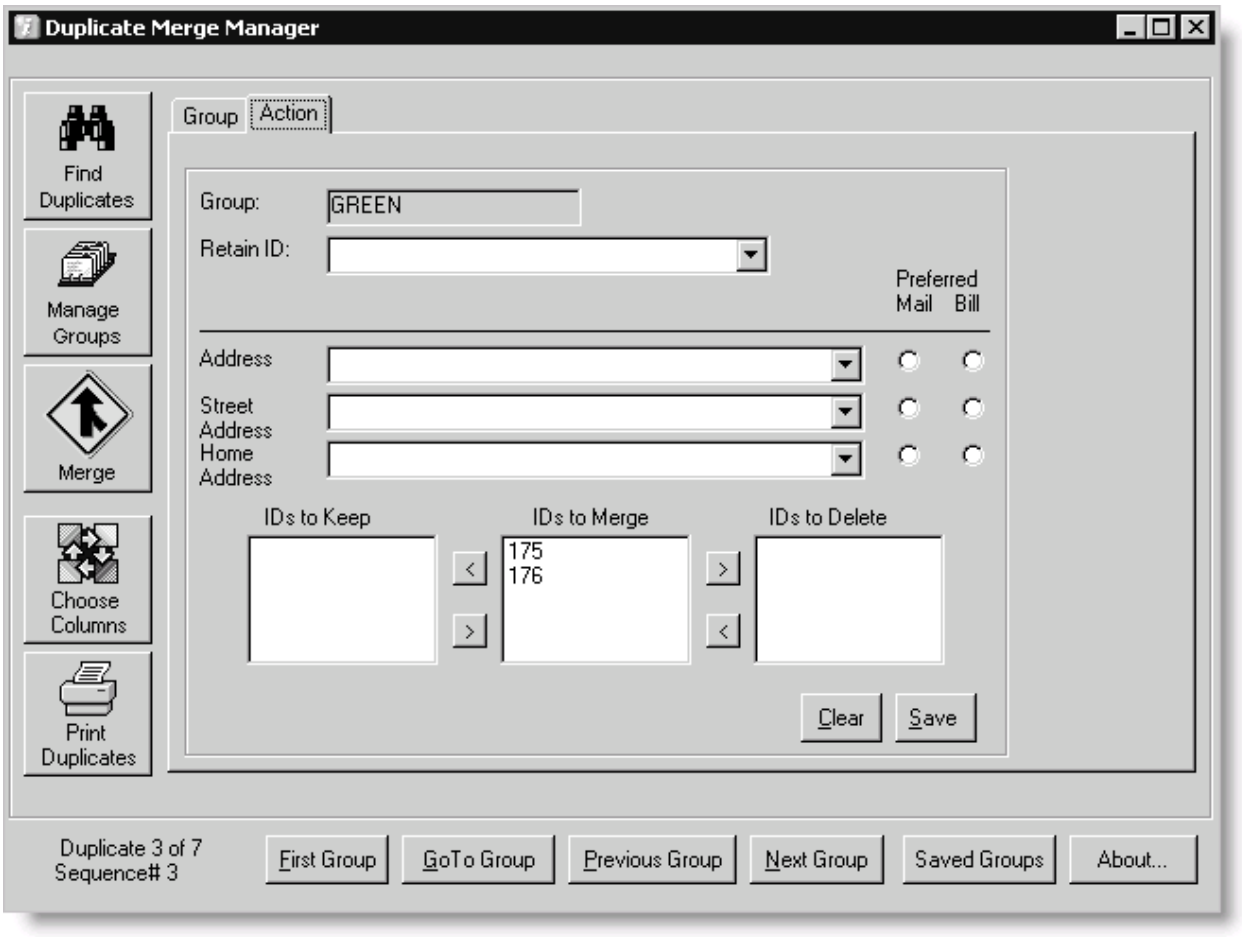
  Note: Clicking this button will print the iMIS Duplicate Merge Manager – Duplicate Group List, regardless of the setting specified on the Report Destination window.

Managing group records

After you have viewed the duplicate groups, you can select records to be merged, deleted, or kept.

Only one user at a time can manage a particular duplicate group. However, multiple users can simultaneously manage different duplicate groups. For example, user Tim can review groups 1 through 10 and user Susan can simultaneously review groups 11 through 20, but user Tim and user Susan cannot review group 30 at the same time.

Action tab in Manage Groups view on Duplicate Merge Manager window



From Customers, select Manage duplicates, click Manage Groups, and select the Action tab

Group tab

Select this tab to view the groups and records within the groups you have created. The group includes the records associated with each group, along with the name and address information for each record. To see more information about the individual records in the group, click Choose Columns and select additional fields or columns.

Action tab

After viewing the records in the duplicate groups, select the Action tab. Select the record to retain, the addresses to keep, the addresses to use for preferred mailing and preferred

billing, the records to merge into the retained record, and the records to delete. There is also an option to keep a record unchanged.

Group

(read only) Displays the duplicate group name.

Retain ID

Enter the Retain ID, or select the Retain ID from the drop-down list.

Address

Displays the address of the Retain ID. You can enter a new address or select an address from the drop-down list.

Street Address

Displays the street address of the Retain ID. You can enter a new street address or select a street address from the drop-down list.

Home Address

Displays the home address of the Retain ID. You can enter a new home address or select a home address from the drop-down list.

Preferred Mail

Select this option to specify the Address, Street Address, or Home Address as the preferred mailing address.

Preferred Bill

Select this option to specify the Address, Street Address, or Home Address as the preferred billing address.

IDs to Keep

Lists the IDs currently selected to be kept “as is.” You can use the < and > buttons to move the IDs that are to be kept “as is” to this list.

IDs to Merge

Lists the IDs currently selected for merging into the Retain ID. You can use the < and > buttons to move the IDs that are to be merged with the Retain ID to this list.

Note: Initially, all of the IDs in the duplicate group are placed in the IDs to Merge list.

IDs to Delete

Lists the IDs currently selected for deletion. You can use the < and > buttons to move the IDs that are to be deleted to this list.

Clear button

Used to clear the Retain ID field, the IDs to Keep list, and the IDs to Delete list.

Save button

Used to save your merge action selections for this group.

Duplicate y of z

(read only) Displays the number of the currently displayed group (y) and the total number of duplicate groups (z).

Sequence#

(read only) Displays the sequence number of the currently displayed group.

First Group button

Displays the first duplicate group. The group is displayed on the Group tab on the Manage Groups view of the Duplicate Merge Manager window.

Go To Group button

Displays the DMM GoTo Sequence Number window, where you can enter the sequence number of the next duplicate group to review.

Previous Group button

Displays the previous duplicate group. The group is displayed on the Group tab on the Manage Groups view of the Duplicate Merge Manager window.

Next Group button

Displays the next duplicate group. The group is displayed on the Group tab on the Manage Groups view of the Duplicate Merge Manager window.

Saved Groups button

Used to load the duplicate groups that were saved to the permanent tables during the current or previous Duplicate Merge Manager sessions. You can then manage and merge these groups, as well as continue to find, manage, and merge new duplicate groups. Duplicate groups that were previously found and saved are not accessible until you click the Saved Groups button.

About button

Used to display the About DMM window. Duplicate Merge Manager version information displays in this window.

To select the Retain ID and the IDs to Merge

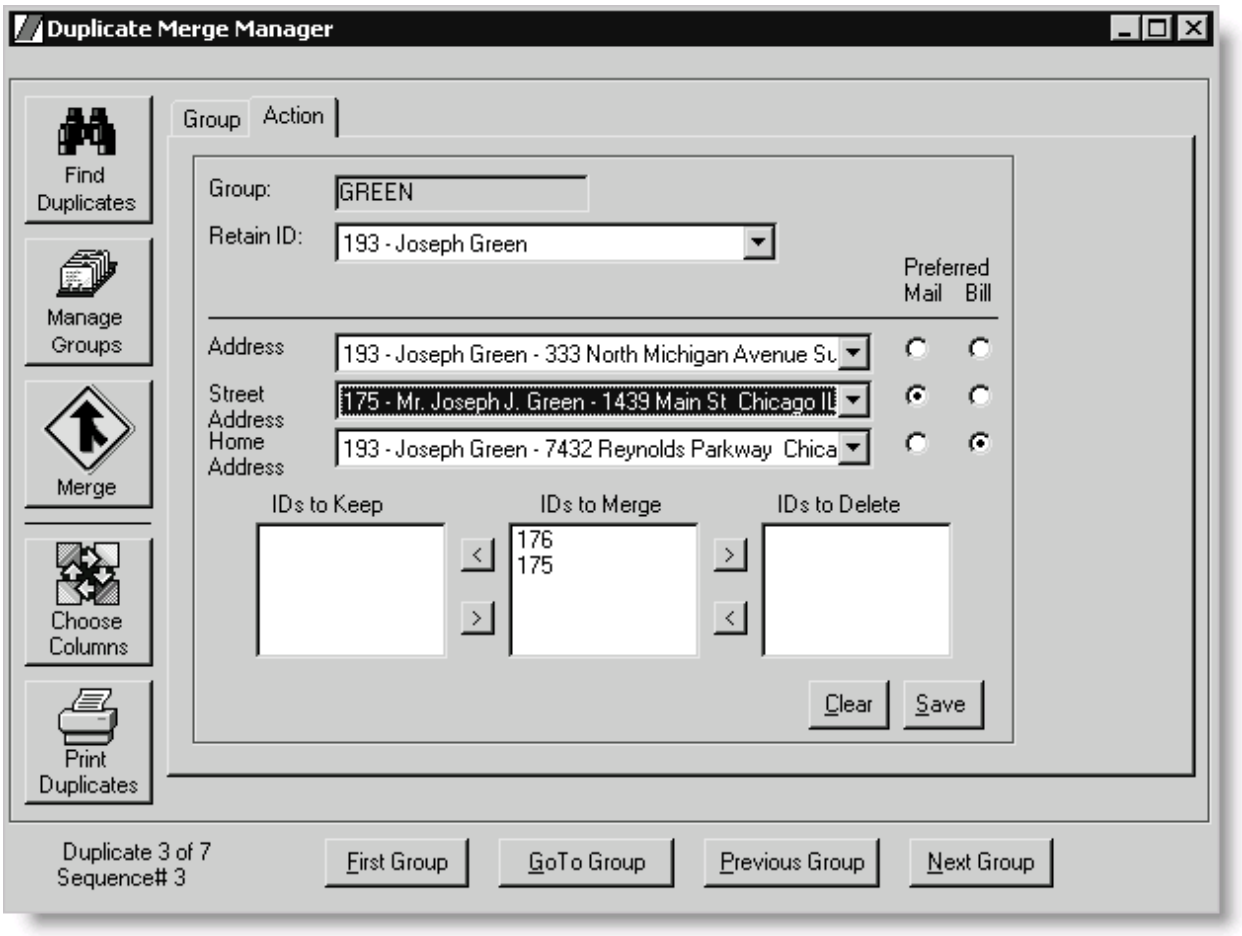
Note: A Retain ID is required in order to process the merge.

1. Select Manage Groups to display the Manage Groups view on the Duplicate Merge Manager window.
2. Click Find Group, GoTo Group, Previous Group, or Next Group to select the duplicate group for which you wish to make selections.
3. Select the Action tab. The Action tab displays on the Duplicate Merge Manager window.

   Note: Initially, all of the IDs in the duplicate group are placed in the IDs to Merge list.
4. Select the Retain ID from the drop-down list of available duplicate record IDs. Only one ID per group can be selected as the Retain ID.
5. Select the addresses to be retained[d] for the Address, Street Address, and Home Address (Main, 2nd, and 3rd) from the drop-down list.

   Note: Prompts for the three address fields are based on the prompt names set in the Customer Setup – Address and Notes window (from Customers, select Set up module> General, and click Address and Notes).

6. Select the preferred mail address by selecting the Preferred Mail option to the right of the Address, Street Address, or Home Address.
7. Select the preferred billing address by selecting the Preferred Bill option to the right of the Address, Street Address, or Home Address.



This example of the Action tab in the Manage Groups view on the Duplicate Merge Manager window shows the Preferred Mail and Preferred Bill options set for the Street Address and Home Address, respectively.

Note: If you do not change an Address selection or a Preferred Mail or Preferred Bill preference, the address information for the Retain ID remains the same as it was before the merge.

To select the IDs to Keep

There may be records in the duplicate group that you determine are not duplicates and that you want to maintain as they currently exist in iMIS. In this case, you can move these records from the IDs to Merge list to the IDs to Keep list.

1. Select the IDs to be kept “as is” in the IDs to Merge list.
2. Click < to move the selected IDs to the IDs to Keep list. These IDs will be ignored during the merge process.

Selecting the IDs to delete

When you select a record for deletion, Duplicate Merge Manager checks to make sure that the target ID can be deleted validly. An ID cannot be deleted if any of the following conditions are true:

- There is no Retain ID.
- There is an open invoice with a non-zero balance where the BT_ID equals the target ID.
- There is an open order where the BT_ID equals the target ID and the order stage is not completed, cancelled, closed, or empty.
- There is an active subscription record where the ID equals the target ID.
- There is a registration for an open event where the ST_ID equals the target ID.
- There is a dependent Referral record where the PROVIDER_ID equals the target ID (and REFERRAL_FEE > 0 and READY_TO_INVOICE = 1 and ORDER_NUMBER = 0).
- There is a Name record where the BT_ID or CO_ID equals the target ID.
- There is a Name_Fin record where the BT_ID equals the target ID.

To select IDs to delete

1. Select the IDs to be deleted in the IDs to Merge list.
2. Click > to move the selected IDs to the IDs to Delete list.

Note: If a record cannot be deleted, a warning message displays explaining why the record cannot be deleted. Minimize the Duplicate Merge Manager window and find the

customer record in iMIS to verify the error. For example, if the message indicates that an active subscription exists for this ID, check the Dues/Subscription Item Detail window for this ID (from Customers, find the customer record, select the Billing tab, and double-click on a line item) to see if there are any active subscriptions. A subscription can have a zero balance and still give this message when the status is A (Active).

To save the selections to merge during the current DMM session

1. After you have selected the Retain ID, the IDs to Keep, the IDs to Merge, and the IDs to Delete, click Save. A message displays asking if you want to store this group to be merged later.
2. Click No.
3. You can review another duplicate group by clicking the appropriate group button. You can override the saved data for a group by changing your selections on the group's Action tab and clicking Save.

To save the selections to merge during a later session

1. After you have selected the Retain ID, the IDs to Keep, the IDs to Merge, and the IDs to Delete, click Save. A message displays asking if you want to store this group to be merged later.
2. Click Yes. A message displays indicating the group's sequence number.
3. Click OK. The group can be merged by clicking Saved Groups and then Merge during the current Duplicate Merge Manager session or during a later session. You can continue reviewing duplicate groups. The next available duplicate group is displayed, or you can select a duplicate group by clicking the appropriate group button.

   Note: The next available duplicate group displayed is the group with the lowest sequence number that has not yet had any merge actions specified with the Manage Groups function.

To edit the selections

Values saved on the Action tab can be edited at any time prior to the Merge process.

1. Click Manage Groups to display the Manage Groups view on the Duplicate Merge Manager window.
2. Click Find Group, GoTo Group, Previous Group, or Next Group to display the group to edit.
3. Select the Action tab.
4. Edit the IDs to Keep, IDs to Merge, and IDs to Delete lists as needed, or click Clear to clear all of the lists.
5. Click Save. If you do not click Save, a message displays when you exit the Manage Groups view on the Duplicate Merge Manager window asking if you want to save the changes you have made on the Action tab. Click Yes to save the changes, or click No to cancel your changes.

Merging and deleting records

After you have used the Manage Groups view on the Duplicate Merge Manager window to select the records to be merged, deleted, and kept and have saved the groups, you can use Duplicate Merge Manager to merge the records. You can perform a Merge while other iMIS users are connected to the system.

Note: When you click Merge, all of the current duplicate groups are merged unless you are performing a merge of two known IDs. You should review all duplicate groups for accuracy and any conflicts before performing the Merge operation.

Caution! It is strongly recommended that you perform a backup of the database before merging records. The Merge process is final. If any records are merged or deleted in error, you will need to restore your database from a backup.

To merge duplicate groups

1. (optional) If you want to merge previously saved duplicate groups, click Saved Groups. A message displays to let you know that if you are currently viewing groups that have not been saved to the permanent table, they will not be maintained.

2. Click Yes. The first saved group displays on the Group tab on the Manage Groups view of the Duplicate Merge Manager window.
3. Click Merge. A confirmation message displays indicating how many duplicate groups have been defined for merging.

   Note: If two or more users have prepared the same group for a merge, Duplicate Merge Manager will probably log an error indicating that it was unable to merge the group because one of the IDs does not exist when it attempts to merge the group the second time. You can remove the extra duplicate group before running the Merge process to prevent this problem. See To remove a duplicate group for information on deleting a previously saved group.

   For performance reasons, indices are built on the following tables:

- Invoice
- Orders
- Trans
- Activity
- Name_FR (One on ID and one on SOLICITOR_ID)

   These indices will remain on the tables unless you restore the .lbr files or perform an iMIS upgrade.

4. Click Yes. After the indices have been built, the merge process automatically begins and a message indicating the merge progress displays in the Duplicate Merge Manager window.

   For each duplicate group that has a Retain ID selected, the utility re-verifies each ID's delete status against the current iMIS database. If a record does not pass the verification process, the error is logged to the event log file. All Merge process messages except for the initial warning, halting errors (errors that prevent the Merge process from continuing), and the final completion message are written to the event log rather than being displayed.

Note: When an error occurs for a group, the merge process continues with the next group; a group with an error will not be merged. For example, if there are four IDs to delete in a group and an error occurs with the first ID, the remaining IDs in the group to delete will not be verified (there may be additional errors on the remaining IDs) and Duplicate Merge Manager will verify the next group for the merge.

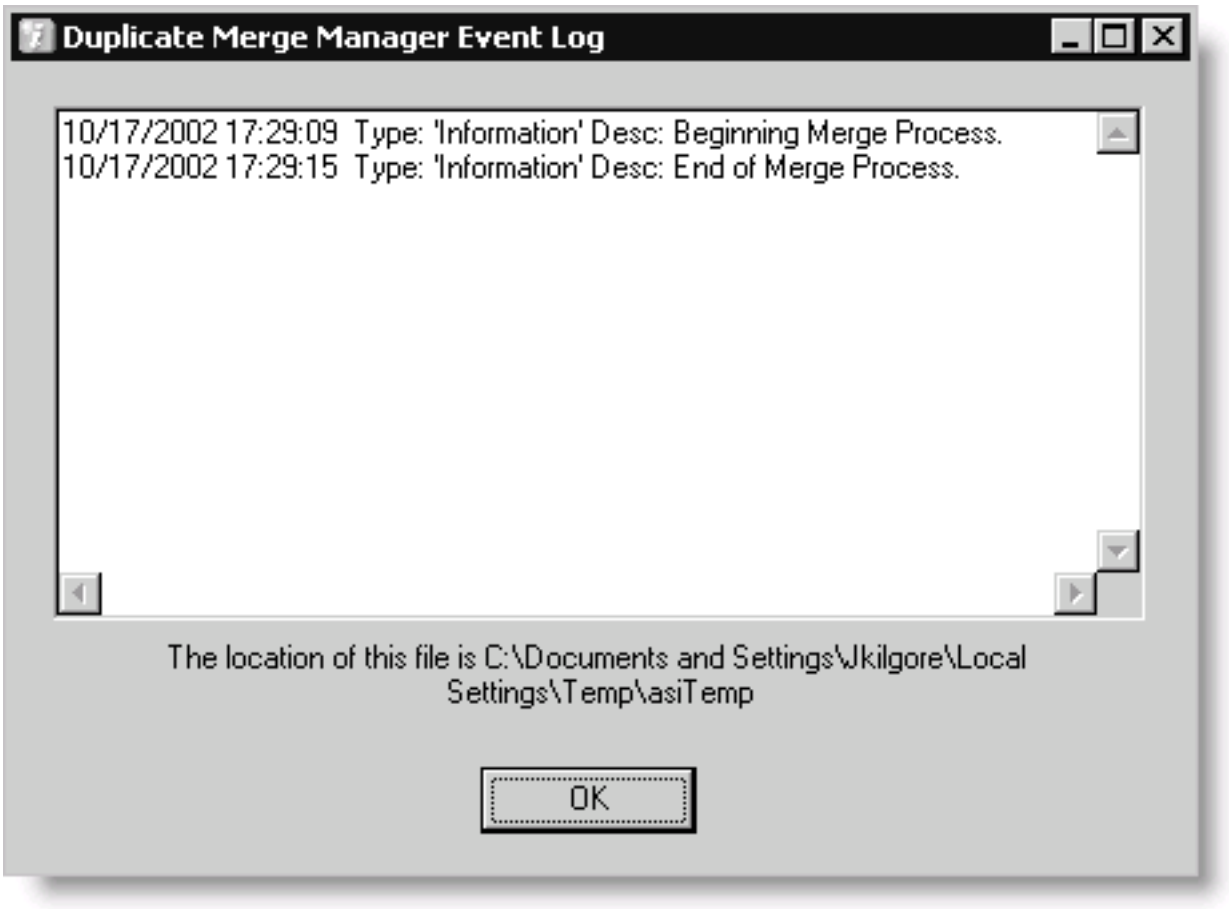
If a record passes the verification process, the address fields for the Retain ID are set to the values selected in the Action tab. All records marked for deletion that meet the deletion criteria are deleted. All subordinate records of the Merge IDs are copied to the Retain ID and the Merge IDs are then deleted.

5. After the Merge process has completed without errors, a message displays indicating how many duplicate groups were merged.

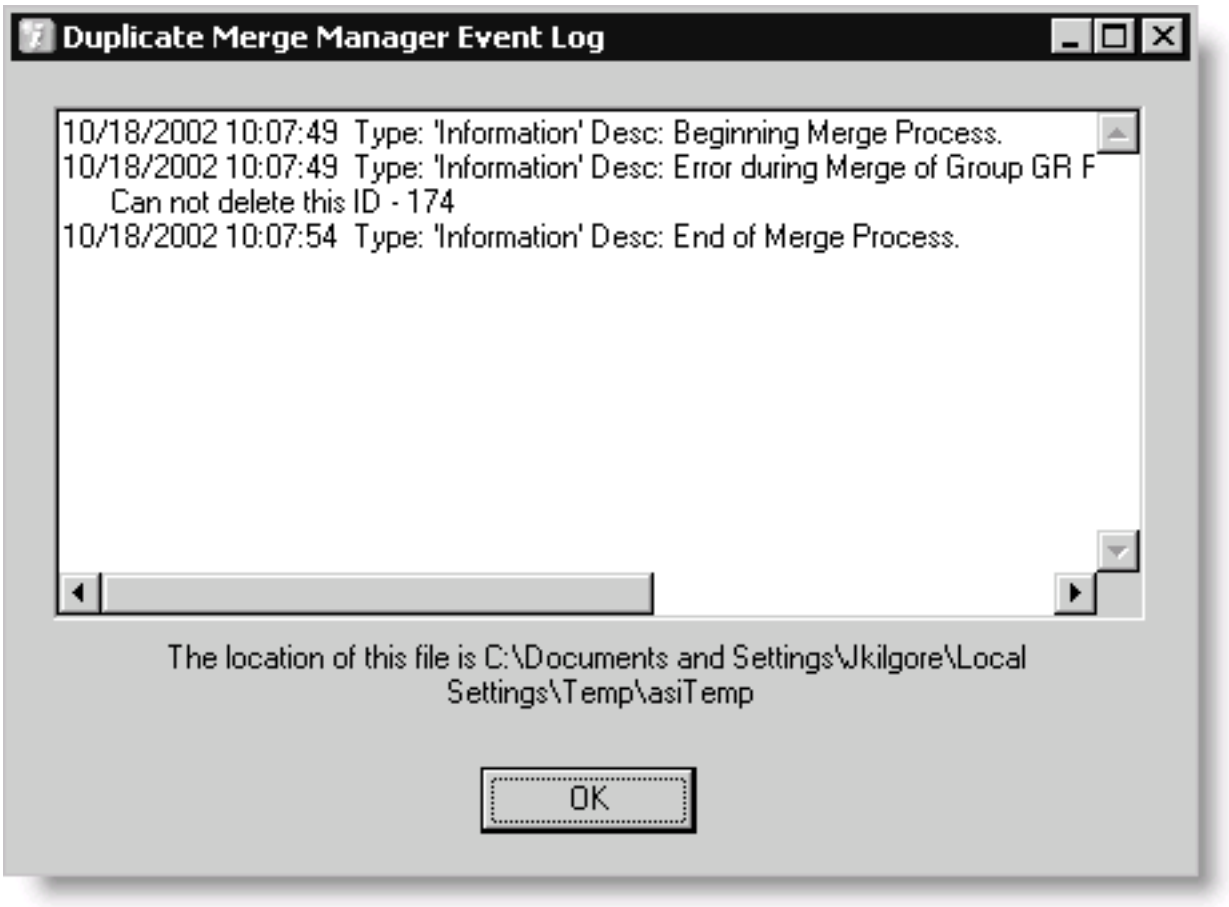
- If there are errors, a message displays with the number of groups processed and the number of groups in error.

  Note: The group Retain IDs that did not merge are stored in DUPLICATE_GROUP.Retain_ID.

6. Click OK. Fix the errors or update the action that was selected for the group and then run the merge again.
7. Click Yes to display the event log, or click No to skip viewing the event log.
8. If you click Yes, an event log displays.
9. After viewing the event log, click OK. The Duplicate Merge Manager window displays.
10. If you click No, the Duplicate Merge Manager window displays.



Example of Duplicate Merge Manager Event Log window after successful Merge process with no errors



Example of Duplicate Merge Manager Event Log window after a Merge process in which an error occurred

To merge two known IDs

1. From Customers, select Manage duplicates.
2. Click Find Duplicates. The Find Duplicates options display.
3. Select Specify two known IDs to Merge.
4. Enter the first ID in the ID 1 field and press Tab. The name and company for the first ID display. If the ID is not valid, a message displays indicating that the ID is not valid.
5. Enter the second ID in the ID 2 field and press Tab. The name and company for the second ID display. If the ID is not valid, a message displays indicating that the ID is not valid. The Duplicate Merge Manager window should appear similar to the following:

6. Click Build Tables. A message displays informing you that the process may take from 2 to 20 minutes.

   Note: If either ID is not valid, a message displays indicating that you must specify two existing IDs. Click OK, specify valid IDs for ID 1 and ID 2, and click Build Tables. A message displays informing you that the process may take from 2 to 20 minutes.

7. Click Yes. The duplicate group containing the two specified IDs displays on the Group tab in the Manage Groups view on the Duplicate Merge Manager window. The Duplicate Merge Manager window should appear similar, now containing tables and a Group tab and an Action tab.
8. Select the Action tab.
9. Select the Retain ID from the drop-down list.
10. Select the Preferred Mail option for the Address, Street Address, or Home Address.
11. Select the Preferred Bill option for the Address, Street Address, or Home Address.
12. Specify whether the ID that will not be retained should be merged with the Retain ID or deleted.

    - To merge the ID with the Retain ID, leave the ID in the IDs to Merge list.
    - To delete the ID, select the ID and use the > button to move the ID to the IDs to Delete list.

13. Click Save. A message displays.
14. You can perform the Merge operation for the two IDs now or save the group containing the two IDs so that the group can be merged later.

    - To perform the Merge operation for the two IDs now, click No and then click Merge.

      Note: If you click No, you must perform the Merge operation immediately. If you run another Find Duplicates process before merging the group containing the two IDs, the temporary tables are overwritten and you will not be able to merge these two IDs without first performing this entire procedure again.

15. Click Merge. A confirmation message displays indicating how many duplicate groups have been defined for merging. Click Yes. A message displays indicating that the merge has completed. Click Yes to view the event log, or click No to skip viewing the event log. For more information on the event log, see To merge duplicate groups.
16. To save the group containing the two IDs to be merged later, click Yes. A message displays indicating the sequence number for the saved group. Click OK. A message displays indicating that no duplicates were found. Click OK. The duplicate group containing the two IDs is saved in the permanent tables and can be recalled later by clicking Saved Groups. You can continue finding and managing duplicate groups or proceed to the Merge process as needed.

Merge actions performed for IDs to merge

During the merge process, the following fields are updated to the value of the Retain ID if they contain the value of any ID from the IDs to Merge list.

Cert_Register	STUDENT_ID, BT_ID
Comment_Log	ID
Comment_Types	ID
Invoice	BT_ID, ST_ID
Invoice_Lines	ST_ID
Meet_Hotel	ID
Meet_Master	CONTACT_ID
Name	CO_ID, BT_ID
Name_Fin	BT_ID
Name_FR	SOLICITOR_ID
Name_Log	ID
Orders	BT_ID, ST_ID, CO_ID (Non-meeting orders only)
Ref_Client	CLIENT_ID
Ref_Provider	PROVIDER_ID
Referral	CLIENT_ID, PROVIDER_ID

Relationship	ID, TARGET_ID
Trans	BT_ID, ST_ID, SOLICITOR_ID
User-defined tables	ID (If the Multiple Instances Allowed option for the table is enabled)

If the following fields contain the values of any of the IDs in the IDs to Merge list, they are also updated to the value of the Retain ID, but only if a record with the Retain ID value does not already exist.

Name_FR	ID
Name_Pic-ture	ID
Name_Note	ID (if a note record with the same Name_Note.PURPOSE does not exist for the Retain ID)
Name_Staff	ID
Subscriptions	ID (If a subscription with the same PRODUCT_CODE does not exist for the Retain ID)
User-defined tables	ID (If the Multiple Instances Allowed option for the table is disabled and the Always Create option is not enabled) Note: If the Always Create option for a user-defined table is enabled, the table will never be merged.

Merging records with open meeting records

When a Merge ID has open meeting records, records linked to the Merge ID in the Order_Badge and Orders tables may or may not be updated to the Retain ID, depending on whether the Disable Auto Flow Down of company address Information option is enabled (from Customers, select Set up module > General, and click Advanced). If the Disable Auto Flow Down of company address information option is enabled, these records are not updated to the Retain ID.

If the Update open meetings addresses with address changes option is enabled (from Customers, select Set up module > General, and click Advanced), the following fields in the Orders table are updated when SOURCE_SYSTEM=MEETING and ST_ID or CO_ID are being merged:

PREFIX

FIRST_NAME

MIDDLE_NAME

LAST_NAME

SUFFIX

DESIGNATION

INFORMAL

TITLE

COMPANY

ADDRESS_1

ADDRESS_2

CITY

STATE_PROVINCE

ZIP

BAR_CODE

COUNTRY

FULL_NAME

FULL_ADDRESS

CO_ID

ST_ID

COMPANY_SORT

EMAIL

DPB

CRRT

PHONE

FAX

LAST_FIRST

In addition, the following fields in the Order_Badge table are updated:

PREFIX FIRST_NAME

MIDDLE_NAME

LAST_NAME

SUFFIX DESIGNATION

INFORMAL

TITLE

COMPANY

ADDRESS_1

ADDRESS_2

CITY

STATE_PROVINCE

ZIP

BAR_CODE

COUNTRY

FULL_NAME

FULL_ADDRESS

If the Update open meetings addresses with address changes option is disabled (from Customers, select Set up module > General and click Advanced), none of these fields other than ST_ID and CO_ID in the Order_Badge and Orders tables are updated during a merge.

After the Merge IDs' records have been copied to the Retain ID and the addresses have been updated as selected on the Action tab, the Merge IDs' records are deleted from the following tables:

Name

Name_Address

Name_Fin

Name_FR

Name_Indexes

Name_Picture

Name_Security

Name_Security_Groups

Name_Staff

Merge actions performed for IDs to delete

During the merge process, the records in the following tables are deleted if any of the fields listed contain the value of any ID from the IDs to Delete list.

Cert_Register	ID, STUDENT_ID
Invoice	BT_ID
Invoice_Lines	Invoice.BT_ID
Meet_Hotel	ID
Meet_Master	CONTACT_ID

Name	ID
Name_Log	ID
Orders	BT_ID
Ref_Client	CLIENT_ID
Ref_Provider	PROVIDER_ID
Referral	CLIENT_ID, PROVIDER_ID
Relationship	ID, TARGET_ID
Subscriptions	ID
Trans	BT_ID
Name_Address	ID
Name_Fin	ID
Name_FR	ID
Name_Indexes	ID
Name_Note	ID
Name_Picture	ID
Name_Security	ID
Name_Security_Groups	ID
Name_Staff	ID

Note: If an Invoice.BT_ID is equal to a Delete ID and the Invoice.REFERENCE_NUM is equal to the Invoice_Lines.REFERENCE_NUM, the Invoice_Lines record is deleted along with the Invoice record.

The following fields are updated to empty if they contain the value of any ID from the IDs to Delete list:

Activity	ID, CO_ID, OTHER_ID, SOLICITOR_ID
Cert_Register	BT_ID
Invoice	ST_ID

Invoice_Lines	ST_ID
Name	CO_ID, BT_ID
Name_FR	SOLICITOR_ID
Orders	ST_ID, CO_ID
Subscriptions	BT_ID
Trans	ST_ID, SOLICITOR_ID
User-defined tables	All records for the Delete ID are deleted

Merge actions performed on ContactMain and UserMain records

As part of the merge process, the following actions are performed on all IDs that are merged or deleted:

ContactMain	SyncContactID	NULL
ContactMain	ContactStatusCode	3 (Delete)

Additionally, if the merged or deleted ID had an associated user record, the following actions are performed:

UserMain	ContactMaster, UserId	Empty
UserMain	IsDisabled	1 (True)

Tip: For optimal performance, purge unused users and contacts (see "Purging user and contact records") using the DB Maintenance Utility after you have merged contact records.

Important:

DMM will not merge any data from .NET tables (other than ContactMain and UserMain). Merging contact records that have associated .NET records may result in orphaned records. Examples include (but not limited to):

- DocumentMain.CreatedByUserKey
- DocumentMain.UpdatedByUserKey
- GroupMain.MemberContactKey
- GroupMain.MemberContactKey

e-Content Manager

e-Content Manager Implementation

Before you begin e-CM

Component Roles

Multiple components work together to deliver content to a website. Some of the more important components have been described below:

- Web Browser- The web browser serves up web pages from the webserver using the Hyper Text Transfer Protocol (HTTP). The browser interprets the Hyper Text Markup Language (HTML) contained in the web pages and to display text, graphics, tables, and other elements. The two most well-known browsers are Netscape Navigator and Internet Explorer.
- Webserver - Webservers answer requests from web browsers, retrieve the required web document, and deliver it to the browser. Webservers and web browsers communicate via the Hyper Text Transfer Protocol (HTTP).
- Internet Information Server- This is Microsoft's webserver application, which communicates with the web browser and other business applications via HTTP. It facilitates the publication and sharing of information. Information can also be shared securely over the Internet with the use of Secure Socket Layer (SSL) encryption. IIS allows you to apply a SSL key to web documents, which is then interpreted and decrypted by the web browser for display. e-Series and e-CM are implemented on IIS. You need to configure and administer IIS to install e-CM.
- Hypertext Markup Language (HTML) - Hypertext Markup Language (HTML) is the language used to create web documents. HTML defines the basic syntax and placement of special characters (tags) that tell the web browser how to display the web document to the end-user.
- ColdFusion (development environment) - ColdFusion is an application development system that includes ColdFusion Application Server and ColdFusion Studio. With

ColdFusion, you can produce webpages that interact with databases and deliver the results as HTML pages for the browser.

- ColdFusion Markup Language (CFML) - ColdFusion Markup Language is a scripting language that allows for the dynamic display of content based on database queries or user input. While HTML determines the layout and appearance of a web page, CFML determines the content that is displayed on the web page. Files created with CFML are given the extension .cfm. ColdFusion Markup Language (CFML) tags can be freely mixed with HTML tags on a webpage. The CFML tags signal the ColdFusion Application Server to perform specific operations and allow ColdFusion to see the ODBC data sources. Each tag identifies a particular operation, such as including a block of code from another file and setting a variable. CFML is a markup language modeled on and similar to HTML. All ColdFusion tags begin with the letters CF.In addition to HTML and CFML, your ColdFusion application pages can contain any client-side technology, including:
- Scripting, such as JavaScript, Jscript, and VBScript
- Executables, such as ActiveX and Java applets
- Dynamic HTML
- Other client technologies
- ColdFusion Server - The ColdFusion server interprets web documents that are written in ColdFusion and process requests accordingly. Generally, ColdFusion process request for dynamic data such as querying databases and returns the results to IIS, which then formats that data into HTML and sends it to the user's web browser.
- Template - e-CM uses a template methodology. By separating graphic design (implemented through the use of templates) and content (residing in a database), it's easy to maintain consistent branding and navigation, while allowing for the dynamic display of content within the site's standard template.
- Cascading Style Sheets - Cascading Style Sheets provide consistent style information such as font, color, and size for web documents. The use of Style Sheets ensures that style (provided by the style sheets) is kept separate from structure (provided by HTML),

leading to easier site maintenance and smaller document sizes. The term 'cascading' is applied to style sheets because more than one style sheet can affect the presentation of a single web document. The various sources of style information or style sheets are assigned weights based on a hierarchical system.

Managing Content for Multiple Websites

If you use e-Content Manager (e-CM) to manage content for multiple websites on a single server, we recommend that you do not use virtual directories on a single webserver instance. Instead, you should have separate instances of the webserver for each website (one IP with host headers rather than one IP with one website and multiple virtual directories).

Using Customized Triggers

Some sites choose to implement customized triggers on iMIS tables. Advanced Solutions International (ASI) does not support user-defined triggers. ASI reserves the right to add triggers to iMIS tables.

Be aware that if you have customized triggers, you will need to recreate them after the upgrade. The iMIS upgrade procedure will remove any non-iMIS triggers.

Pre-Tasks for New Installations

Perform the following steps before you begin the iMIS installation:

1. Install or verify access to a Microsoft SQL Server or SQL Express database server.
2. Locate your Omnis7 and iMIS license codes which include the appropriate e-CM licensed keys.

   Note: You need an iMIS license key that contains the e-CM keys as well as a license number for the Ektron WYSIWYG Editor that is supplied through ASI.
3. Have access to the iMIS installation image.
4. Verify that ColdFusion is installed on a Windows 2000 or Windows 2003 Server.
5. Install the latest Service Packs and updates per the system requirements.

6. Ensure access to the Internet, that IIS is installed, and that IP addresses are assigned accordingly.

e-CM Project Planning

Project planning helps you set expectations and estimate the costs of implementation. With proper planning, you can:

- Calculate project costs
- Set customer expectations
- Set management expectations
- Plan and coordinate resources
- Track progress

e-CM Implementation Project Plan

Advanced Solutions International (ASI) has developed an implementation plan and methodology to ensure a smooth implementation of e-CM. This process parallels the process used to implement the iMIS and e-Series modules. e-CM requires the same kind of planning and forethought that is required for a successful iMIS implementation. You should not take shortcuts even if clients want to implement e-business solutions quickly. Consider very carefully the issues that will encourage web visitors to use the new site.

The project plan has five major phases:

- Business Process Review
- Development
- User Acceptance
- Launch Process - Go Live
- Continuous Improvement

All project costs relate to one of these phases. The key to a successful implementation is to manage expectations throughout all phases of the process. To accomplish this, you

must present regular status reports to a designated customer staff member to review and update the project status. These meetings should occur at least bimonthly.

It is important to note that unlike iMIS, and e-Series to a lesser extent, e-CM is the organization's highly visible portal to their customers, so careful planning is imperative.

Proper project planning and adequate staff resources are critical to a successful e-CM implementation. The reseller should allocate four or more staff members to the implementation. These should include the following:

1. Project Manager - The project manager is responsible for managing project resources, preparing and modifying the project plan, tracking project status, facilitating status meetings with the client, and managing the overall project implementation. In addition to staff resources, the project manager works with clients to access client resources. The organization should provide an operations representative to provide hands-on implementation assistance. This would include tasks such as granting security access to the server, arranging hardware purchases, maintaining liaison with the ISP, configuring firewall or proxy servers to permit access to the site, and configuring software to match the identified business processes. The project manager should be in continual contact with the organization's decision-makers and managers to help determine and manage the expectations for the new e-Series site. This contact should be initiated at the very beginning of the project.
2. Consultant - The consultant should have strong iMIS and/or web experience and training in the setup and configuration of e-CM. The consultant is responsible for analyzing and prototyping key processes with key client personnel, as with other iMIS products. The consultant should be skilled in analyzing output requirements, documenting back-office processes for e-Series modules, and training administrators and customers.
3. Information Architect - The information architect is key to giving your site a logical order and flow of information. The Information Architect will be instrumental in developing a smooth-flowing website that is easy for the audience to navigate so that they can find the information they desire quickly.

4. Technical Consultant - The technical consultant should be experienced with Windows NT Server, Windows 2000 Server, SQL Server, and Macromedia ColdFusion. The technical consultant must ensure that the software and hardware requirements for e-Series modules are in place before setting up and configuring the application.

   e-CM Phase I - Business Process Review

   Before the kickoff meeting, an implementation survey should be given to the client team to answer baseline questions about project goals and intentions. The team will develop needs analysis from information gathered from the survey.

   The kickoff meeting with the client team and the reseller team is crucial to the project's success. Everyone involved in the project should be aware of the project's goals and issues. The kickoff meeting is the time to set realistic expectations. After the meeting, the reseller team should set up meetings with key department managers to gather the information for the needs analysis in greater detail.

   Note: These are estimates only and will vary from client to client based on the size of the current website and the desired functionality.

   Phase I time estimates - 30 Days

- Business Review / Needs Analysis
- Information Architecture to organize content (See section below on Information Architecture)
- Develop or Restructure Navigation
- Develop Tagging Structure
- Develop Sub Sites
- Creative
- Graphic Designers
- Look and Feel consensus
- Initial Template Creation

e-CM Phase II - Development

In this phase, the entire hardware and software infrastructure is installed and tested and development work is also started on any gap or special needs of the client. There are two sub-phases in Phase II:

First Sub-phase - This sub-phase involves reviewing and identifying the hardware and software requirements with the client and determining elements of the project, such as the location of servers, the relationship with the ISP, and the telecommunications requirements. During this phase, the organization will order software, hardware, and telecommunications lines. The telecommunications setup should be decided upon as early as possible because there often are weeks- or months-long lead times for the installation of these lines, especially for T1 lines.

Second Sub-phase - In this sub-phase, the reseller sets up and installs the software on the webserver. The reseller also begins to develop site templates as well as any additional custom work required. At this time, site layout and design are discussed with client and several prototype sites may be developed. The client and the reseller usually share in the assignment of resources during this phase. Typically, the client obtains the server and arranges the installation of telecommunications lines and server software. The reseller installs e-CM on the prepared server. However, some resellers with networking and hardware resources may provide a turnkey installation.

Carefully consider the issue of firewalls and proxy servers. ASI currently does not offer guidance on configuring these servers because there are so many vendors with both hardware and software solutions. A technician knowledgeable with the client's firewall or proxy server should be available to open a channel for traffic to get through the firewall. Depending upon the configuration, the SQL database server and/or the webserver may be inside the firewall. Whatever the configuration, the channel through the firewall must be open to allow either the ODBC connection from the webserver to the SQL database server, or the connection from the webserver to the ISP.

Once the navigation, tagging, and style of the site have been determined from Phase I, the reseller will begin Phase II by setting up an initial site as well as developing additional

ColdFusion templates and style sheets for all associated websites. Also during development, the migration of data from the existing site to the e-CM site will begin as outlined by the Information Architect.

A general rule of thumb for manually migrating pages from an existing site to e-CM is five pages per hour. If a site has greater than 300 pages, it is recommended that you discuss with ASI Consulting the best method for importing pages.

Any custom development or pages are created and integrated into e-CM during Phase II.

Phase II time estimates - 14 - 60+ Days

- Review hardware and software requirements with client.
- Order required hardware, telecommunications lines, and software.
- Set up Windows Server, ColdFusion, SQL Server links.
- Install e-CM on server.
- Web designers finalize design elements.
- Create and/or refine templates and style sheets for sites and subsites.
- Migrate content from existing site to e-CM.
- Rough configuration of e-Series modules if applicable.

e-CM Phase III - User Acceptance

In this phase, the applications consultant will sit down with the client's operations contact and key staff to discuss site management, training, and ongoing maintenance. Typically, these key personnel are membership managers, meeting directors, database administrators, marketing personnel, and so forth. Because their expectations are the ones that must be met, these managers should be involved in the project. Furthermore, their expectations should reflect those of the constituents who will use the site, and these constituents' expectations based on their user experience and the flow of the website.

Generally, the staff of the organization should have 30 days to test their site to verify that all content is present, that the database tables are being updated correctly, and that e-

Series processes are in place in the iMIS, as well as ensuring that any other issues are resolved before going live to the public.

Phase III time estimates - 30 Days

- Training of staff.
- Testing of website.
- Tweak look and feel.
- Verify data integrity.
- Document all setup parameters and any alterations to pages or scripting. Document back-office procedures for credit card processing, cancellations, password assignment, and so forth.
- Caution client about changes that may affect the upgrade path. Test processes and transactions on test database; obtain client sign-off.

e-CM Phase IV - Transition from Production Database to Live

In this phase, you will move the configured site to the production database and webserver, review the site, apply SSL certificates, and finally open the site to the Internet. The following steps involve connecting the site with the live production database and verifying that the custom pages, colors, and configuration parameters meet the client's requirements. It is the client's responsibility to market the site and to inform constituents, members, and the public that the site is up and running and why they should log on. However, the reseller should encourage the client to develop a site-marketing plan.

Phase IV time estimates - 1- 7 Days

- Move e-CM-related items from test database to production database.
- Copy files to production webserver.
- Review site to ensure that all elements are in place.
- Publicize the website and open it to the Internet.

e-CM Phase V - Continuous Improvement

Plan on at least eight hours of post-implementation and technical support. Caution the client not to make any alterations or changes to the site infrastructure, such as changes to ColdFusion, the IP address, or the network, without consulting the reseller. Most site failures are due to “do-it-yourself” alterations to enhance the site or to solve perceived problems. A website requires a close interaction of hardware and software to stay up and running. Casual changes can break the chain that keeps the site functional.

Information Architecture

When you go to a website and find exactly what you want in two or three mouse clicks, this is a good indication that the site has been constructed with good Information Architecture principles. No one ever thinks about it because if it works well, it's invisible.

According to Michael Brooks, Creative Director at Schema Studios in Chicago, “an Information Architect ensures for the client that the site being developed can be easily updated and expanded -- that it is scalable. On the developer side, the IA ensures that the development team has a solid foundation on which to build and can concentrate their efforts on graphic design, strategy and content development. For the end user, the IA designs a navigation system that users can easily move through without confusion”.

While it is not practical for us to go into great detail about Information Architecture, it is a topic that must be pursued and understood to successfully implement a content management system.

A good starting resource for Information Architecture is the O"Reilly publication Information Architecture for the World Wide Web by Louis Rosenfeld and Peter Morville, 2nd edition. The following chapters are particularly useful:

- Ch 3 User Needs and Behaviors
- Ch 4 The Anatomy of an Information Architecture
- Ch 5 Organization Systems
- Ch 6 Labeling Systems

- Ch 7 Navigation Systems
- Ch 9 Thesauri, Controlled Vocabularies, and Metadata

Once you have a good understanding of the information mentioned above, it will make your decisions easier on how to best implement e-CM for your client. Information Architecture decisions and plans need to be made and agreed upon before we can proceed with installing our content management system.

Four Phases of Information Architecture

ASI has a four-phase approach to Information Architecture:

1. Research
   - Assess current site
   - Assess goals/mission/vision
   - Complete competitive analysis
   - Hold stakeholder meetings
   - Complete content analysis/content inventory
2. Concept and Strategy
   - Creative process
   - Think and use whiteboard
   - Work through scenarios with team
   - Create strategic plan for future use and administration
3. Planning
   - Design and define navigation systems
   - Flow diagrams
   - Create detailed site maps
   - Label

- Semantics is hard
- Analyze and assess contextual possibilities
- Classify content
- Create page layouts
- Create controlled vocabularies/content tags
- Plan content migration

  Note: The more you plan, the better your site and its content will work.

4. Implementation

- Work with content management/delivery system
- Tweak any of the aforementioned steps

  If you do not have an Information Architect on staff, consider outsourcing to a local contractor or contact the ASI Consulting.

Working with Technical Support

FTP Access to webserver

In order to debug a problem with your e-Series website, Advanced Solutions Technical Support may need FTP access to the webserver where the e-Series source code is installed.

You can set up an FTP site in IIS. FTP site setup is similar to Website setup.

- Open IIS on the webserver.
- Right-click on the website and select New> FTP site.
- Enter the IP address and the required properties.

  Access to the iMIS database

To be able to debug a problem with your e-Series Website, Advanced Solutions Technical Support may need to access to your database. The iMIS database can be accessed with PC Anywhere, RAS access, or over the Internet.

Screenshots

If the e-Series Website is behind a firewall and cannot be viewed by Advanced Solutions Technical Support, you must send screenshots of all error messages. The preferred method for sending screenshots is to paste the screenshot into Microsoft Word and e-mail the Word document as an attachment.

Debugging in ColdFusion

To debug a problem with your e-Series Website, you may need to turn on ColdFusion debugging. Turn on debugging before you call Technical Support so they can go to the Website and gather all of the necessary information.

e-CM Support Tips

IP Address

To determine the IP address of a site, run the following file in the browser window:

http://www.yoursite.com/virtualdirectory//AM/setup/showip.cfm

Manually recreate Verity Collection

While not recommended, you may be directed by ASI to recreate your Verity collection. Contact ASI Technical Support before executing the search collection setup (http://www.yoursite.com/virtualdirectory/am%20/am/admin/search/searchcollectionsetup.cfm).

Problems Logging In to Site

Clear Cookies

During the installation and configuration stage, it is helpful to clear your site's cookies from the browser, especially when rerunning the application or the e-CM Wizards.

Rename the AM Directory

If you appear to have problems logging into e-CM and it is not clear if it is an e-Series issue or an e-CM issue, you can rename the AM folder in Customer and attempt to log in to a plain e-Series site (http://yourURL/Source/security/member-logon.cfm). If you can log into e-Series, the chances are that you have not run the e-CM Wizard correctly.

Error Running e-CM Wizard

If the e-Series Application Wizard runs but the e-CM Wizard fails, verify that the SQL database user has access to all the e-CM tables in the iMIS database. The iMIS role does not grant privileges to these e-CM tables.

Admin Portal Links Appear Not Active

If the Admin Flash Portal links do not appear to be active, right-click on the button to determine the version of the Flash Plug-in that is installed on your browser. Upgrade to version 7.0 or later.

Content Not Appearing on Site

Review Publishing Service in Admin Portal for messages and pending events.

Verify that the publishing server is configured correctly. To verify this, determine if the service starts. Review the log files found in the c:\Program Files\e-CM 5 directory for errors. If necessary, edit the PublishService.exe.config file to point to the correct database.

Verify that the publishing service is using a valid IP address.

Note: Do not use 127.0.0.1.

Use Sales Demo VM as an Example

The Sales Virtual Demo site is a good reference point for installing your own site, and also provides multiple examples of templates. Contact ASI Sales to obtain the demo virtual machine.

Installing and upgrading e-Series/e-CM

Note: This main procedure appears identically in both the e-Series and the e-CM reference guides.

About installing e-CM with iMIS

Note: Be sure to back up your iMIS database before performing the following steps.

Installing e-CM is very similar to installing e-Series, except that you do some database configuration with the e-CM Wizard. The following procedures outline the process of installing e-CM as well as creating a demo tutorial site.

Tip: Install the tutorial site first as a guideline and example before creating new e-CM sites for customers.

To install or upgrade e-Series and e-CM

To prepare for installation

1. Back up your customized files so that you can reapply the customizations after upgrading e-Series. All customizations are overwritten during the upgrade process.
2. Ensure that you have completed a successful installation or upgrade of iMIS 15 on the appserver where you plan to install e-Series and e-CM.

- If you performed a Custom installation of iMIS 15, you must have chosen e-Series as one of the options to install (The e-Series zip file is automatically installed as part of a Complete installation.)
- (e-CM only) You must have performed a Custom installation of iMIS 15, and you must have chosen Publishing Service as one of the options (Publishing Service is required for e-CM and is not part of a Complete installation.)

  Caution! If you performed a Complete installation, or you performed a Custom installation of iMIS 15 and did not choose these listed Optional Components, then you must first install these components before performing this procedure. You can easily add these components to an already installed instance of iMIS 15 by choosing Start > Control Panel > Add or Remove Programs. From the list of Currently installed programs, select iMIS15 and click Change/Remove. When the Welcome page appears, select Modify and click Next to proceed.

3. Ensure that you have planned your iMIS architecture and have ensured the prerequisite conditions for all hosts and clients.
4. Ensure that a version of ColdFusion supported by this version of iMIS is installed on the iMIS appserver.
5. Ensure that a version of iBO for COM supported by this version of iMIS is installed on the appserver.
6. Ensure that a mail server has been configured in ColdFusion.
7. (e-CM only) Ensure that you have configured ColdFusion to redirect the storage of client variables to a database instead of to the registry of the appserver.
8. If you installed ColdFusion in a location other than the root (C:\CFusionMX), adapt the affected file paths below accordingly.
9. Ensure that the Windows Explorer folder options on the host are set so that all files are visible in Windows Explorer.
10. Ensure that Internet Explorer's Temporary Internet File options on the host are set so that IE checks for newer versions of stored pages every time you visit the webpage.

To install or upgrade e-Series and e-CM into an iMIS 15 environment

Note: Some steps pertain only to e-Series or to e-CM. If you are not installing both into your iMIS 15 environment, you can skip the steps that are marked for the product that you are not installing.

1. (upgrades only) Back up all files located in your current e-Series directory. Any files that you customized in the \Customer folder will be overwritten during this procedure. You must have access to your customized versions of these files so that you can reapply your customizations after upgrading e-Series.
2. Locate the e-Series self-extracting zip file (eSeries.exe) on the appserver, which is in the folder C:\Program Files\ASI\iMIS15\eSeries.CF.

   Note: If this folder does not exist, you performed a Custom installation of iMIS 15 and did not specify to install e-Series. You must Modify the installation of iMIS 15 (Start > Control

Panel > Add or Remove Programs > iMIS15, and click Change/Remove) to install the e-Series optional component before continuing this procedure.

3. Run the eSeries.exe file.

   The WinZip Self-Extractor window appears.

4. Click Unzip without changing any of the default settings.

   A C:\eSeries\ folder is created on the appserver.

5. (e-Series only) Copy all files from the C:\eSeries\Customer\Source\CustomTags folder to the C:\CFusionMX\CustomTags folder.

6. (upgrades only) If you are not using the iMISpublic application in your iMIS 15 environment, you must slightly modify the instructions in all of the following steps. For any step that refers to the iMISpublic application's virtual directory in IIS or the corresponding local path in the file system, you must instead substitute your current e-Series virtual directory and local path.

   Caution! If you are using the iMISpublic application in your iMIS 15 environment, then you must follow the remaining steps exactly, without substitution, to ensure that e-Series and e-CM are properly integrated with the iMISpublic application.

7. Use IIS Manager to locate the file system folder that contains your iMISpublic application files.

- Open IIS Manager and expand the folder tree to display the folders beneath the Default Web Site.
- Right-click the iMISpublic application and choose Properties.

  The Properties window appears.

- Write down the Local Path value that is displayed in the Virtual Directory tab. (This is C:\Program Files\ASI\iMIS15\iMIS_public by default.)

8. Move the entire contents from the C:\eSeries\Customer folder to the file system folder that contains the root of your virtual directory for the iMISpublic application (for example,

to C:\Program Files\ASI\iMIS15\iMIS_public). If any file overwrite warnings are displayed, click Yes to All to approve the overwrites.

9. (e-CM only) Edit the IIS default documents and custom errors for the iMISpublic application.

- Open IIS Manager and expand the folder tree to display the folders beneath the Default Web Site.
- Right-click the iMISpublic application and choose Properties.

  The Properties window appears.
- On the Documents tab, click Add and specify the file name Template.cfm.
- Click OK and then click Move Up to position the Template.cfm file at the top of the list.
- On the Custom Errors tab, modify the error handler for 403;14 as follows:
- Message type: Select URL
- URL: Enter /iMISpublic/AM/404ErrorHandler.cfm (Assuming your iMISpublic application uses the default name. If you specified a different name for the iMISpublic application, use that name accordingly in the URL.)
- On the Custom Errors tab, modify the error handler for 404 as follows:
- Message type: Select URL
- URL: Enter /iMISpublic/AM/404ErrorHandler.cfm (Assuming your iMISpublic application uses the default name. If you specified a different name for the iMISpublic application, use that name accordingly in the URL.)
- Click OK.

10. Modify a key in the iMISpublic application's web.config file to prevent issues that can occur if e-Content Manager is not being used to customize e-Series or iMIS 15 Public view content.

    Note: Skip this step if you are not using the iMISpublic application.

- Open IIS Manager and expand the folder tree to display the folders beneath the Default Web Site.
- Right-click the iMISpublic application and choose Properties.

  The Properties window appears.
- On the ASP.NET tab, click Edit Configuration.

  The ASP.NET Configuration Settings window appears.
- On the General tab, in the Application Settings area, edit the EnableContentManager key to be true.
- Click OK.

11. Create a SQL Server login for e-Series and ColdFusion to use for ODBC and JDBC connections.

    Caution! Do not use the Create_CF_Login_For_Customer.sql script, as in previous releases. Instead, manually create the SQL Server login as follows.

- Open SQL Server Management Studio and log onto your iMIS database server host.
- In the Object Explorer pane, collapse the Databases folder so that you can locate the Security folder for the host itself. (As opposed to the Security folder for a specific database).
- Right-click the host's Security folder and choose New > Login.

  The Login - New window appears.
- In the Login name field, specify a meaningful name for this login so that other database administrators will recognize it as a special login used for e-Series and ColdFusion data sources (for example, CF_ESERIES).
- Select SQL Server authentication and specify a strong password for the new login.
- Record this login name and password for safekeeping. You will need these at several points in the process of installing and configuring e-Series and ColdFusion.

- If the following checkboxes are displayed on the window (this depends on whether the database server supports mixed authentication), set them as follows:
- Enforce password policy - Select this checkbox.
- Enforce password expiration - Clear this checkbox.
- User must change password at next login - Clear this checkbox.
- From the Default database field, select your iMIS 15 database.
- Click OK.
- In the Object Explorer pane, expand the Databases folder so that you can locate your iMIS database.
- Expand the node for your iMIS 15 database so that you can locate the database's Security folder.
- Right-click your database's Security folder and choose New > User.

  The Database User - New window appears.
- In the User Name field, enter the name of the SQL Server login that you defined for use by e-Series and ColdFusion (for example, CF_ESERIES).
- Select Login name and in the associated field, enter the name of the SQL Server login that you defined for use by e-Series and ColdFusion (for example, CF_ESERIES).
- In the Owned Schemas list, select the db_owner checkbox.
- Click OK.

12. (e-Series only) Create an ODBC data source for the e-Series connection to the iMIS 15 database.

- Choose Start > Administrative Tools > Data Sources (ODBC).

  The ODBC Data Source Administrator window appears.
- On the System DSN tab, click Add.

  The Create New Data Source window appears.

- From the list, select SQL Server and click Finish.

  The Create a New Data Source to SQL Server wizard appears.
- In the Name field, specify a meaningful name such as e-Series. You may optionally specify a Description too.
- From the Server drop-down list, select the SQL Server host that contains your iMIS 15 database.
- Click Next.

  The second page of the wizard appears.
- Select With SQL Server authentication using....
- Click Client Configuration.

  The Add Network Library Configuration window appears.
- From the Network libraries options, select TCP/IP.
- Click OK.

  Your focus returns to the Create a New Data Source to SQL Server window.
- Select the Connect to SQL Server to obtain... checkbox.
- In the Login ID field, enter the name of the SQL Server login that you defined for use by e-Series and ColdFusion (for example, CF_ESERIES).
- In the Password field, enter the password that you defined for the SQL Server login that you defined for use by e-Series and ColdFusion.
- Click Next.

  The third page of the wizard appears.
- Clear the Use ANSI quoted identifiers checkbox.
- Clear the Use ANSI nulls, paddings and warnings checkbox.
- Click Next.

The fourth page of the wizard appears.

- Select the Perform translation for character data checkbox.
- Click Finish.

  The ODBC Microsoft SQL Server Setup window appears.
- Click Test Data Source.

  If the test completes successfully, your data source for e-Series and ColdFusion is working properly.

13. (e-CM only) Create a JDBC data source for the e-CM connection to the iMIS 15 database.

- In ColdFusion Administrator, go to Data Sources.
- From the drop-down list of drivers, select Microsoft SQL Server.
- Click Add and specify the connection information for the SQL Server login that you defined for use by e-Series and ColdFusion in a preceding step.
- Continue with the section Configuring ColdFusion and all remaining implementation sections of the e-Series and/or e-CM references.
- (upgrades only) Reapply all customizations to your e-Series and e-CM content as needed.
- If you are using e-CM alongside iMIS 15.1 and later releases, you must make some modifications to the master page of every existing website that is set up to be an ASP.NET website. These modifications ensure that the websites will work properly in the 15.1 environment (and later releases). For more information, refer to To modify master pages for iMIS 15.1 and later.

To modify master pages for iMIS 15.1 and later

If you are using e-CM alongside iMIS 15.1 and later releases, you must make some modifications to the master page of every existing ASP.NET website. These modifications ensure that the websites will work properly in the newer iMIS environment.

You perform this modification only once for all existing ASP.NET websites. All new ASP.NET websites that are created after you've upgraded iMIS will already have these modifications.

Note: These changes do not apply to ColdFusion websites, because they use .cfm files instead of master pages.

1. Change the base class inherited by the master page.

- Locate the following code:

  <%@ Master Language="C#" AutoEventWireup="true" Inherits="Asi.ContentManagerNet.MasterPageBase" %>

- and change it to this:

  <%@ Master Language="C#" AutoEventWireup="true" Inherits="Asi.Web.UI.MasterPageBase" %>

2. Find the form element that has id="mainform" and change its id attribute to id="TemplateForm".
3. Insert the following element directly after the form element that you modified in the preceding step:

   <asp:ScriptManager ID="ScriptManager1" runat="server" EnablePageMethods="true" EnablePartialRendering="true" EnableScriptGlobalization="true" AsyncPostBackTimeout="3600"></asp:ScriptManager>

4. Add a new content placeholder for the iMIS 15.1 environment's template button bar, which is the control that conditionally displays Save and Cancel buttons, etc. at the bottom of the Main Content Area of an interior page.

- Find the tr element that contains an asp:ContentPlaceHolder element that has id="TemplateBody". The code for the entire tr element should look similar to this:

  <tr>

    <td class="interior_main_content interior_main_content_style">

```
    <div id="interior_ca_6_style">
      <CM:TemplateAreaSection ID="ContentArea6" TemplateAreaName="Content Area 6" runat="server" />
    </div>
    <div class="interior_main_content_breadcrumb_style">
      <CM:BreadCrumb ID="BreadCrumb1" runat="server" />

      <a id="content" class="skiplinks"></a>
      <asp:ContentPlaceHolder ID="TemplateBody" runat="server">
      </asp:ContentPlaceHolder>
    </div>
  </td>
</tr>
```

- Immediately following the tr element you found in step 4.a, add the following new tr element:

```
 <tr>
   <td style="width:100%">
     <div style="float:right; white-space:nowrap; margin-right: 10px; background-color:White; display:inline;">
       <asiweb:CommandButtonBar ID="ButtonBar" runat="server" TargetControlID="ContentDiv" />
       <asp:ContentPlaceHolder ID="TemplateButtonBar" runat="server"></asp:ContentPlaceHolder>
     </div>
   </td>
```

</tr>

5. Find every element that begins with <%= and change these to begin with <%# instead. In the default master pages for each of the Template Gallery templates in e-CM, the following elements will need to be changed like this. (The following list shows the original <%= value that must be changed to <%#.)

- 1501
- <%= GetContentAreaStyle(1) %>
- <%= GetContentAreaStyle(2) %>
- <%= GetContentAreaStyle(3) %>
- <%= GetContentAreaStyle(4) %>
- 1502 - contains none of these elements
- 1503 - contains none of these elements
- 1504
- <%= ContentAreaStyle %>
- 1505 - contains none of these elements
- 1506
- <%= GetContentAreaStyle(1) %>
- <%= GetContentAreaStyle(1) %>
- <%= HeaderStyle %>
- 1507
- <%= ContentArea1Style %>
- <%= FooterAreaStyle %>
- 1508
- <%= HeaderAreaStyle %>

- <%= FooterAreaStyle %>
- 1509
- <%= GetContentAreaStyle(1) %>
- <%= GetContentAreaStyle(2) %>
- <%= HeaderAreaStyle %>
- 1510
- <%= GetContentAreaStyle(1) %>
- <%= GetContentAreaStyle(2) %>
- <%= HeaderAreaStyle %>

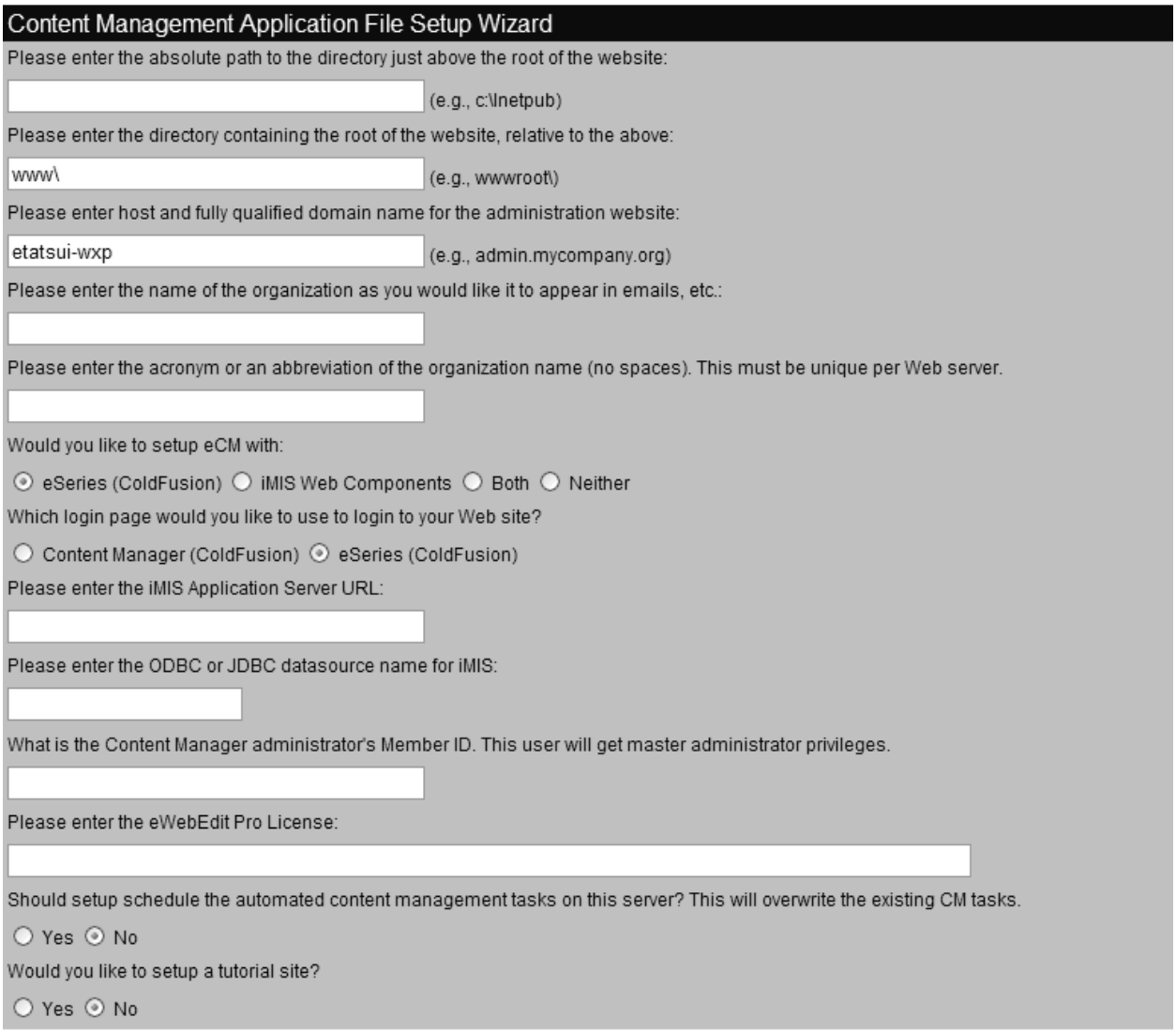
Running the e-CM Wizard

Required: Upgrading from Option 2 to Option 1

Content Manager 5.0 supported two e-CM configurations:

- Option One (one database): Implement e-CM as part of iMIS database.
- Option Two (two databases): Implement e-CM as a separate database, using iMIS for authentication.

iMIS 15's web-based structure and integral use of content management tools, as well as web-based security and performance advances, requires Option One for iMIS 15.0 and forward. If you are upgrading from Option Two, you must move to a single database setup in order to upgrade to iMIS 15.



Content Management Application File Setup Wizard

Enter the information for your website in the Content Management Application File Setup Wizard and click Continue.

Please enter the absolute path to the directory above the root of the website:	The Root Level of where the e-CM Files are installed. Example: c:\eCM
Please enter the directory containing the root of the website, rel-	Next level down from Root. Example: Customer

ative to the above:	
Please enter host and fully qualified domain name for the administration website:	Machine name or IP of where files are mapped in IIS. Example: 196.34.36.123 or my.machine.org
Please enter the name of the organization as you would like it to appear in emails, etc.:	Name that appears in emails that e-CM sends as well as Window Titles in e-CM Admin Portal
Please enter the acronym or an abbreviation of the organization name (no spaces). This must be unique per webserver.	Short abbreviation or acronym for client website. Name also is used when creating Verity Collections and scheduled tasks in ColdFusion
Would you like to setup e-CM with e-Series (ColdFusion), iMIS Web Components, Both, or Neither?	Choose the option that specifies which sources of iMIS web content you plan to use e-CM to manage. Note: Neither (Option 2) is unsupported.
Which login page would you like to use to login to your website?	If using e-Series or iMIS Back office choose e-Series.
Please enter the iMIS Application Server URL	URL of the iMISpublic virtual web server of iMIS 15 (The Public view of iMIS). Example: http://appserver-Name/imispublic
Please enter the ODBC or JDBC datasource name for iMIS:	Data Source pointing to the iMIS database Note: Running against an empty iMIS database (Option 2) is unsupported.
What is the e-CM administrator's Member ID. This user will get master administrator privileges.	iMIS ID or record ID of initial designated Administrator of e-CM
Please enter the eWebEdit Pro License:	License Key for Ektron WYSIWYG html editor. If License is not known or unavailable, enter “n/a”. Can be updated at a later time.
Should setup schedule the auto-	Used to schedule e-CM activities such as reindexing

mated content management tasks on this server? This will overwrite the existing CM tasks.	collections, deleting expired content, notifying producers for expiring content. These are all scheduled through the ColdFusion task scheduler
Would you like to setup a tutorial site?	Recommended for first time installs.

After running the e-CM Wizard

If successful, you will see the verity collections created using the name that was entered in the acronym field, and be prompted to log in to the e-CM Administrative Portal.

You may be prompted to install the Macromedia Flash Plug-in. If prompted, choose Yes.

If you chose the tutorial site for the e-CM Wizard, a new site has been copied to the web-server, which you need to configure.

The login and password will match the ID of the user inserted in the e-CM Wizard.

Caution! After you run the Wizards, disable all access to the Wizards folder in Internet Information Server.

To configure the Administration Portal site

If you installed e-CM into a virtual directory in IIS, you must modify some properties of the admin website.

1. Log in to the e-CM iMIS Website Administration Portal.
2. Go to the website properties page for the website Administration Portal site.
3. Under the prompt, "If you are using more than one website with the same URL entered above, please enter the unique URL that will go directly to this Website." add the virtual directory and append /admin to the end of the path. (In an iMIS 15 environment that uses the iMISpublic application, the virtual directory name is iMISpublic by default.) For example:

- www.examplesite.com/virtualdirectory/admin
- iMIS 15: www.examplesite.com/imispublic/admin

4. Save your changes.

Enabling search of HTML content

To enable searching of HTML content in ColdFusion, perform these steps:

1. Navigate to the Collections folder that is located at the root of the website.
2. Navigate to the OrganizationName_1_Content\style folder and delete the style.vgw file.
3. Navigate to the Collections folder that is located at the root of the website.
4. Navigate to the OrganizationName_2_Content\style folder and delete the style.vgw file.

Checklist: e-CM post-installation

- Review Database Tables Created and Populated
- Review ColdFusion Scheduled Task created
- Review Services Installed
- Review Folders created on server once Publishing service started

Configuring ColdFusion

Section Goal

The goal of this section is for you to gain the knowledge and skills needed for configuring ColdFusion.

After completing this section, you will be able to perform the following tasks:

- Register custom tags
- Connect ColdFusion to a data source
- Configure ColdFusion settings
- Map ColdFusion to the source directory
- Enable ColdFusion debugging

Registering Custom Tags

You must register the custom tags for ColdFusion to interpret SQL commands.

To register the TCPClient custom tag

You must register the CFX_TCPClient custom tag to verify the connection to the PayPal server.

1. Log in to ColdFusion Administrator.
2. Under Extensions, select CFX Tags to display the CFX Tags page.
3. Click Register C++ CFX to display the Add/Edit C++ CFX Tag page:

- Enter CFX_TCPClient for the Tag Name.
- Browse to the Server Library (.dll). For example, C:\C-fusionMX\CustomTags\TCPClient.dll).
- Enter ProcessTagRequest for the Procedure.
- Enable Keep Library Loaded.
- Enter a Description.

4. Click Submit to return to the CFX Tags page. The tag displays under Registered CFX Tags.

Connecting ColdFusion to a Data Source

ColdFusion requires a connection to a data source for e-Series to update your database.

To connect ColdFusion to a data source

Before connecting ColdFusion to a data source, make sure an ODBC data source has been created on the server.

1. Log in to ColdFusion Administrator.
2. Under Data & Services, select Data Sources to display the Data Sources page.
3. Add a new data source:

- In the Data Source Name field, enter the name of the data source created on the server for your e-Series installation.
- Select a Driver. (For combined e-Series and e-CM sites, you must select Microsoft SQL Server for the driver.)

- Click Add to open the Data Source Connection page (page name varies according to the Driver selected).

4. Click Show Advanced Settings to expand the page and view all connection options.
5. Enter the CF_Customer Username and Password.
6. (optional) For MSDE, limit simultaneous connections to five users:

- Enable Limit Connections.
- Restrict connections to 5.

7. Click Submit to update the data source and return to the Data Sources page. ColdFusion automatically verifies the connection (indicated by the Status of the data source). To verify all data source connections, click Verify All Connections.

Configuring ColdFusion Settings

e-Series requires the configuration of several ColdFusion settings.

To change variable storage from the Registry to a database

e-Series uses ColdFusion application and session variables. By default, ColdFusion stores client variables in the Windows registry for a period of 90 days. However, storing application and session variables in the registry may cause the registry to fill up, which can cause ColdFusion applications to stop and can seriously affect the performance of the Windows server. To prevent this, all variables should be stored in a table in a SQL Server or Access database using ODBC.

1. Create a new empty database using MS SQL Server or MS Access. Avoid using your iMIS database.
2. Create an ODBC data source named CFVariables that points to your new empty database. Use the administrator login without using a password, and test the data source connection.
3. Log in to ColdFusion Administrator.
4. Connect ColdFusion to the CFVariables data source.
5. Under Server Settings, select Client Variables to display the Client Variables page.

6. Under Select Data Source to Add as Client Store, select CFVariables from the drop-down list, and click Add to open the Add/Edit Client Store page.
7. Enable the following options:

- Create Client database tables (can be run only once).
- Purge data for clients that remain unvisited for xxx days (2-5 days is recommended).
- Click Submit Changes to add the data source and return to the Client Variables page.

8. Select CFVariables as the default storage mechanism for client sessions, and click Apply. (Do not select the registry as the default storage mechanism for client sessions.)
9. In SQL, give the CF_Customer user full permission for the CFVariables database.
10. Return to the CFVariables OBDC data source created in Step 2, and change the login and password to CF_Customer.

    Note: For SQL Server, it is not necessary to change the login in the ODBC data source because the password is not saved in the data source (assuming "sa" password is not blank).
11. In ColdFusion Administrator on the Data Sources page, select CFVariables to edit the data source connection, and change the Username and Password.

    Note: If you delete the default database or truncate tables after you set them, you will not be able to get back into ColdFusion.

To configure mail server settings

For e-Series to connect to your mail server, you must enter the mail server's IP address in ColdFusion. If a customer tries to register for a meeting or edit their record and the mail server's address is not populated, an error message displays:

No SMTP Server Specified for CFMAIL.

Note: The mail server IP address does not have to be a valid address until the e-Series site is public.

1. Log in to ColdFusion Administrator.

2. Under Server Settings, select Mail to display the Mail Settings page.
3. Enter the Mail Server IP address.
4. (optional) Accept the default Server Port, or enter a different one.
5. Enter the number of seconds for the Connection Timeout (the time ColdFusion should wait for a response from the mail server).
6. Click Submit Changes.

Mapping ColdFusion to the Source Directory

You must map ColdFusion to the source directory, which contains the encrypted business logic code for e-Series modules.

To map ColdFusion to the source directory

1. Log in to ColdFusion Administrator.
2. Under Server Settings, select Mappings to display the ColdFusion Mappings page.
3. In the Logical Path field, enter the IP Address of the machine where the site files are being staged. Because we are using a virtual directory for the customer site, add /eSeries (or your site name) after the IP address.
4. Enter the Directory Path by browsing to the eSeries folder. (The name in the directory path must match the name of the folder exactly.)
5. Click Update Mapping.

Enabling ColdFusion Debugging (optional)

The debugging features of ColdFusion are helpful when you are trying to determine the cause of problems that may occur when you install e-Series.

To enable ColdFusion debugging

1. Log in to ColdFusion Administrator.
2. Under Debugging & Logging, select Debugging Settings to display the Debugging Settings page.
3. Enable the following options:

- Enable Debugging.
- Enable Performance Monitoring.

4. Click Submit Changes.

Securing e-CM

In e-CM, authority groups must be assigned to navigation items and content folders. You can add content authority groups and content managers as needed. When you begin adding and organizing the website content, determine who will be responsible for specific site navigation items and content records. For example, if all staff members responsible for website content will be allowed to add, edit, and delete all website content, you may want to assign all of these staff members to the Master Admin content authority group. However, if you want to assign responsibility for specific website content areas to specific staff members, you can create several content authority groups and assign each staff member to the appropriate group.

A content authority group should normally give full permissions to the Webmaster and the core members of the website content team. Content managers who are only responsible for specific site navigation items and content records can be assigned the appropriate permissions. For example, if all changes made by a specialized contributor need to be approved by the Webmaster or a core member of the website content team, you can assign the specialized contributor edit permissions but not approval permissions.

Note: User permissions are read and stored in memory when the user logs in. Any changes made to the account of a user who is logged in do not take effect until the user logs out and then logs in again.

Master Admin Group

The “Master Admin” group, which is marked with an asterisk in the list of authority groups, is a special group. If a user is in “Master Admin,” they will carry at least the permissions they have in that group to all content owned by all groups, even if they are not a member of the group that owns the content. If their permissions in a specific group are higher than those they have in “Master Admin,” the higher specific permissions will apply.

Typically, your Webmaster and/or core web staff members should be assigned to Master Admin with full permissions. This will allow them to go anywhere on the website(s) and do whatever they need to any content without having to first add themselves to the groups that own the content.

Any member of the Master Admin “super group” can also publish all approved content in a website by clicking on the publish button at the top of the list of items or folders, regardless of what permissions they have in Master Admin.

Reviewing Security Manager Settings

To find client settings for Security Manager:

1. Log in to the e-CM administrative interface.
2. Select Admin.
3. Select Site Maintenance.
4. Select Security Manager from the list of installed modules.

   Note: When you enter e-CM settings, the Client Settings tab displays by default.
5. If you make any changes, click Save or Refresh. After navigating to the client settings page, change any settings you wish.

   Note: If you click Save, your settings will go live when Reset Server Variables is selected or when the application variables for the site time out.

Security Manager variables

eCM provides several settings or variables that assist in maintaining site security. These variables are accessible under Admin > Site Maintenance > Security Manager > Define. Not all of these variables will be useful to you, but reviewing the descriptions is worthwhile. For example, several useful variables help you block, track, and unlock logins.

To block simultaneous login

If SCBlockSimultaneousUsers is enabled, the system checks to see if someone with the same ContactID is already logged in. The system can detect that the same user has

logged in twice, after accidently closing the original browser window, and lets them back in. If the user credentials do not match, the system detects that the user is logging in from a different browser and blocks the second login. If the inactivity time limit has passed, the user can log back in immediately.

This prevents users from using the same login in two simultaneous sessions. When the user is blocked, they are presented with the message stored in SCSimUlUserBlockedMessage. If the user logs out, using the standard logout page, all of their information is cleared, and they can log back in immediately.

To release locked login

If user login tracking has been enabled, you can go to /AM/Admin/Security/showLoggedInUsers.cfm. This interface will show you all the users who have logged into CM, their names, email addresses, iMIS IDs, current location and when they got to that location.

The page that unblocks users is at /AM/Admin/Security/clearSimUserBlock.cfm. This page provides a mechanism for unlocking any specific person or all people in the system. If someone calls into the organization saying they are locked out, an e-Series administrator can use this page to unblock that specific user.

Managing Content Authority Groups

To create a content authority group

Note: When a new content authority group is created, it does not contain any members.

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Enter the Group Name.
5. Select Create.

To change the name of a content authority group

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Select the Edit icon displayed to the left of the group.
5. Enter the new name in the Group Name field.
6. Select Update.

To delete a content authority group

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Select the Delete icon displayed to the left of the content authority group to be deleted. A confirmation message displays.
5. Click OK to delete the group.

Adding Content Managers to an Authority Group

To add a member to a content authority group

Note: If the user you wish to add is not in the member or user database, you must first add the user to the appropriate database.

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Select the group to edit or select the Edit icon.
5. Select Add.
6. Select or enter the member information.

- To select an existing member, select the name from the drop-down list, or
- To select a user from the database that has never been a content producer, enter data into one of the following fields:
- First name and last name
- Member ID
- First name, last name, and member ID

7. Select Add.
8. Select the permissions for the member.
9. Select Update.

Selecting e-CM Permissions

The following permissions can be assigned to a content manager:

- Content Editor - A user with Content Editor permission can access and edit content that is owned by the authority group and can publish previously approved content, but cannot approve content. You should normally assign this permission to any user who needs to work with content that is owned by the group.
- Upload - A user with Upload permission can upload files and attach them to a content record. You should normally assign this permission to all content editors unless there is a specific reason not to assign this permission.
- Content Approver - A user with Content Approver permission can approve and publish any content record (either in a navigation item or a content folder) owned by the group. You should normally assign this permission to the lead content producer in the group (along with the Nav/Folder Editor permission, which gives the user the authority to publish navigation items and content folders).
- Nav/Folder Creator - A user with Nav/Folder Creator permission can create, update, and delete navigation menu items and content folders in areas of the website that are owned by the group. This is a high-level administrator permission that normally should be given to very few users. This permission allows the user to rearrange or delete entire sections

of the website.

- Nav/Folder Editor - A user with Nav/Folder Editor permission can edit settings on any navigation items or content folders owned by the group publish any content in navigation items or content folders owned by the group, and publish entire content folders or navigation items that are owned by the group.
- Default Owner - A user who is designated as the Default Owner is the default owner of any new navigation item or content folder if no owner is specified for the navigation item or content folder.

To set content manager permissions

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Select the Authority Group.
5. Select the user.
6. Select the appropriate permissions for the user.
7. Select the toolbar you want the user to access.
8. Select Update.

Managing Security Assignment Permissions

Security assignment permissions give you general permissions to do things in e-CM (as opposed to ownership permissions over specific content). Here we will explain permissions as they apply to content producers.

Note: To view a list of managers in a group, select Website> Content Managers, View Groups by Editor.

Reviewing Content Producer Security Assignments

When a content producer is initially assigned to a group, they are automatically given the security assignment permission required to access navigation owned by their group(s).

They are also allowed to view the navigation items of any Website on which any of their groups is active. However, unless their security settings are altered they cannot:

- Access content folders
- Create, update or delete tagged page designs
- Edit the tagging categories
- Edit their own permissions in authority groups
- View or change website properties

If you want to give a user advanced permissions, you will have to alter their security settings.

To view security permissions

1. From the e-CM Admin page, select Admin.
2. Select Security Assignment.
3. Enter the user's search information and click Find.
4. Select the user's name to view their security assignment.

To modify a user's security settings

If you change a user's security assignments while the user is logged in, the user must log out and then log in again to receive their updated security assignments.

1. From the e-CM Admin page, select Admin.
2. Select Security Assignment.
3. Enter the user's search information and click Find.
4. Select the user's name to view their security settings.
5. Enable or disable the appropriate permissions.
6. Click Assign.
7. From the e-CM Admin page, select Website.

8. Select Content Managers.
9. Select View All Groups.
10. Select the content authority group that contains the member or select the Edit icon displayed to the left of the content authority group.
11. Select the Delete icon displayed to the left of the member. A confirmation message displays.
12. Click OK.

Managing Authority Groups

When you first set up e-CM, most of your content will probably be owned by one of the default groups set up when e-CM is installed.

As you begin to add and organize your content, think about who will be responsible for each navigation item and folder. If a small number of on-site staff members who work closely with each other will be responsible for all content, it might be fine to stick with the default groups and give staff members different permissions based on their authority over website content.

At the other extreme if you have a need to allow, for example, someone to maintain content in only one navigation item or folder and don't want that person to be able to make changes anywhere else in your website, you will want to set up a special authority group for just that item.

If you have a large organization with multiple departments, you also need to be aware of different work styles in different departments. Some may prefer a very restricted model giving only one person authority to approve and publish; others may be much more relaxed.

To disable an e-CM account

If you need to disable a Content Manager's ability to access site navigation and content folders and do not have time to remove them from each authority group, you can change their security assignment settings by removing the Content Folders and Site Navigation

permissions. For example, if a staff member resigns, you should also disable their security settings.

To remove a user from a group

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Select the content authority group that contains the member or select the Edit icon displayed to the left of the content authority group.
5. Select the Delete icon displayed to the left of the member. A confirmation message displays.
6. Click OK.

To edit a user's permissions in a group

1. From the e-CM Admin page, select Website.
2. Select Content Managers.
3. Select View All Groups.
4. Select the content authority group that contains the member or select the Edit icon displayed to the left of the content authority group.
5. Select the member or select the Edit icon displayed to the left of the member.
6. Modify the member's permissions as needed.
7. Select Update.

Setting Security Assignments

Security Overview

Workflow Manager controls which content users can view and the content they are responsible for in e-CM, but there is one level of additional security in Content Manager. This security level controls two things:

- Which applications users can view as administrators
- What general powers users have as administrators

The specific permissions you assign to users will vary depending on which modules you have installed and whether you are using e-CM or Content Manager. If a user attempts to access e-CM but does not have the required permissions, a warning message displays.

To review or modify users' security assignment permissions, you must have at least one account with permission to modify security assignments.

Modifying a user's security assignments

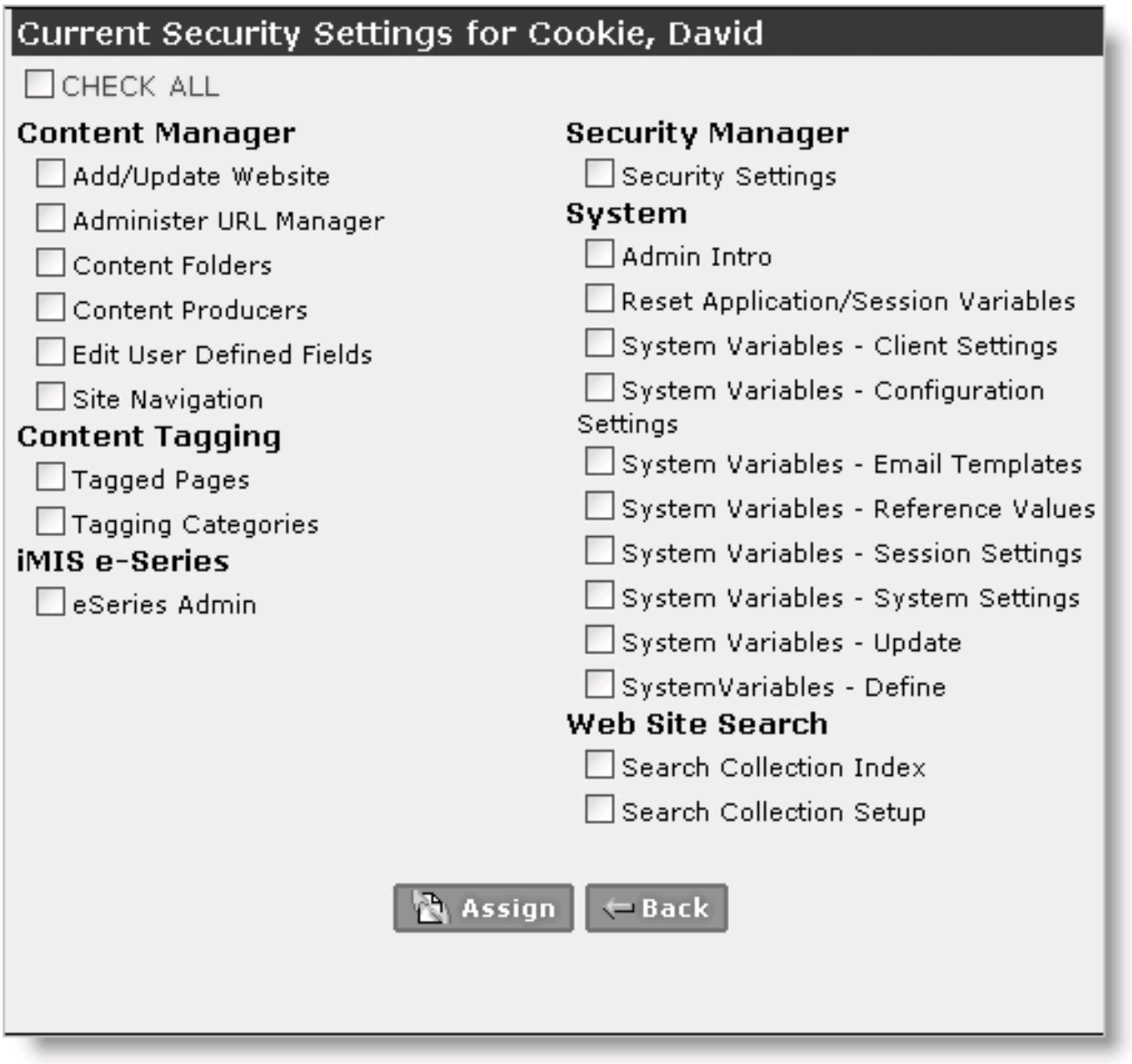
If you are logged in to an account that has permission to modify security assignments, perform the following steps to modify a user's security assignments:

1. From the e-CM Admin page, select Admin.
2. Select Security Assignment. A security assignments search page displays.
3. Enter the appropriate search information in the Find User area and select Find. The search results are displayed.

   Note: If the user does not have an account, you must create an account for the user in your database.
4. Select the user account from the Search Result list. The Current Security Settings page for the user displays.
5. Modify the user's security assignments as needed.
6. Select Assign. A message displays to confirm that the user's security assignments have been updated.

   Note: If you change a user's security assignments while the user is logged in, the user must log out and then log in again to receive their updated security assignments.

   Current Security Settings page



Current Security Settings

The Current Security Settings page contains the following options and icons:

CHECK ALL

Enable to enable all security assignments for the user.

Content Manager permissions

- Add/Update Website - Enable to allow the user to access the Sites selection on the Web-site navigation menu and create, edit, and delete websites.

- Administer URL Manager - Enable to allow the user to create shortcuts for long URLs. A confused or malicious user could cause minor problems by misusing this feature, but this option is not generally a significant security risk.
- Content Folders - Enable to allow the user to access content folders. The specific content folders the user can access and the operations the user can perform in these content folders are controlled by the user's authority group memberships and the user's specific permissions in these authority groups. If this option is not enabled, the user cannot access any content folders.
- Content Producers - Enable to allow the user to create, edit, and delete authority groups and content managers. This is a high-level permission which should only be given to administrators.
- Edit User Defined Fields - Enable to allow the user to edit user-defined fields. This is a high-level permission which should generally only be given to high-level administrators.
- Site Navigation - Enable to allow the user to access navigation menu items. The specific navigation menu items the user can access and the operations the user can perform in these navigation menu items are controlled by the user's authority group memberships and the user's specific permissions in these authority groups. If this option is not enabled, the user cannot access any navigation menu items.

  Content Tagging permissions

- Tagged Pages - Enable to allow the user to create, edit, and delete tagged pages and tagged page components.
- Tagging Categories - Enable to allow the user to create, edit, and delete tagging categories and perform other functions in the Tagged Pages administration menu (for example, search for tagged content records and reset cached pages).

  e-Series permissions

- e-Series - Enable to allow the user to administer e-Series.

  Security Manager permissions

- Security Settings - Enable to allow the user to access the security assignment interface. If this option is enabled, the user can modify the permissions of anyone on the site, so this option should only be enabled for high-level administrators who require access to the security assignment interface.

  System permissions

- Admin Intro - Enable to allow the user to view the administrative interface's "splash screen". This option does not present any security risk.
- Reset Application/Session Variables - Enable to allow the user to reset application and session variables.
- System Variables - Client Settings - Enable to allow the user to edit client settings.
- System Variables - Configuration Settings - Enable to allow the user to edit configuration settings.
- System Variables - Email Templates - Enable to allow the user to edit e-mail templates.
- System Variables - Reference Values - This option does not control any permissions relevant to Content Manager.
- System Variables - Session Settings - There is no need to edit session variables in Content Manager.
- System Variables - System Settings - Enable to allow the user to edit system settings in Content Manager.
- System Variables - Update - Enable to allow the user to access the editing module for all settings. This permission is required in order to access the specific types of variables the user has been given permission to access.
- System Variables - Define - Enable to allow the user to access the interface used to create the update interface. This option is not generally needed.

  Web Site Search permissions

Search collections are created during the e-CM installation process. You do not need to perform any additional setup for search collections.

Re-indexing is part of the automated process that runs nightly. It is recommended that you do not manually run the re-indexing process, because it is a resource-intensive process that generally takes 10-20 minutes to run and it normally reduces the website's performance.

If needed, you can re-index the search collections at any time from the Reindex Search Collections page (select Site Search and then select Reindex Search Collections).

- Search Collection Index - Enable to allow the user to manually re-index the site's search collections.
- Search Collection Setup - Enable to allow the user to modify the search collection setup.

Assign icon

Lets you assign the selected security assignments to the user.

Note: e-CM security settings are independent of e-Series security groups.

e-CM Settings

Content Manager's behavior is controlled in part by a variety of setting which can be found when you select Site Maintenance in the Admin section of the administrative interface.

e-CM settings are divided into several types:

- Client Settings: These are preferences about how the administrative and front-end interfaces work, some of which you may wish to change.
- Configuration Settings: Most configuration settings are set-up options which you are not likely to change once your site is set up.
- Session Settings: These are settings which apply to the “session” of a particular website visitor - there is no need to change them.

- System Settings: You will see a tab for system settings, but there are no system settings in Content Manager.
- Email Templates: These control the content and formatting of automated e-mails sent out by Content Manager.

  Note: These settings control the behavior of e-CM across all your websites.

Content Manager Settings tabs

Reviewing the e-CM settings

To find client settings for Content Manager:

1. Log in to the e-CM administrative interface.
2. Select Admin.
3. Select Site Maintenance.
4. Select Content Manager from the list of installed modules.

   Note: When you enter e-CM settings, the Client Settings tab displays by default.
5. If you make any changes, click Save or Refresh. After navigating to the client settings page, change any settings you wish.

   Note: If you click Save, your settings will go live when Reset Server Variables is selected or when the application variables for the site time out.

Client Settings Tab

Client settings allow you to control the behavior of the sites you are administering with your instance of Content Manager. While you may well want to leave most of the client

settings at their default values, it is worth at least taking a quick look at what preferences are available.

Quick Refresher on e-mail Reminders

Each individual content record in e-CM has an “expiration date,” set on a per-content record basis. As that expiration date is reached, the user who owns it will start to receive e-mail reminders indicating that the content needs to be updated.

Expiration Settings for a Content Record

CMExpAdditionalDays

Standard Description: The e-CM module has the ability to send automatic e-mail reminders to Content Managers at regular intervals, to ensure that content is current and updated. This variable sets the interval (number of days) at which reminders will be sent to the designated content managers.

What This Means: Like many of the variables on this page, this one controls the e-mails, which are sent out to owners of content which has expired (gone a specified number of days without being published and/or updated). The question asked by this variable is “how often do you want to bug people if they do not respond to the first e-mail?”

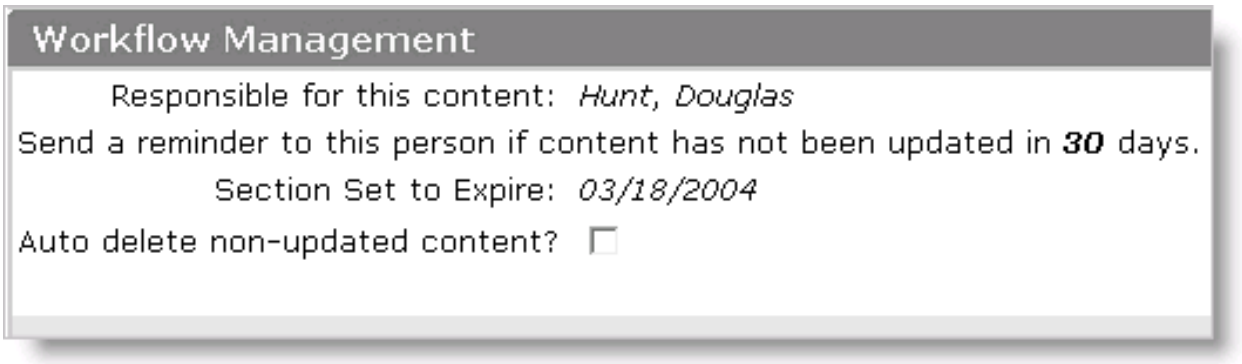
Default: The default is 7 days.

CMExpirationNotice1

Standard Description: e-CM is set up to send automatic e-mail notices to Content Managers for navigation menu items that have acquired an 'expired' status. This variable sets

the number of days after a section has 'expired' that the first e-mail notice is sent to the assigned content manager.

What This Means: When does the first e-mail go out to the owner after a content record has reached its expiration date?



Expiration Date

Default: 5

CMExpirationNotice2

Standard Description: e-CM is set up to send automatic e-mail notices to Content Managers about navigation menu items that have acquired an 'expired' status. This variable sets the number of days after a section has 'expired' that the second e-mail notice is sent to the assigned content manager.

What This Means: When does the second e-mail go out (if owner has not responded to the first by updating or re-publishing the content)?

Default: 10

CMExpirationWarning1

Standard Description: e-CM is set up to send e-mail reminders to Content Managers when navigation menu items are about to expire. This variable sets the number (which should always be a negative value) of days before a navigation menu section's expiration date, that the first e-mail warning is sent to the assigned content manager.

What This Means: How many days in advance of the expiration date should the owner of a content record receive the first warning that it is about to expire? Value should be a negative integer (should have a minus sign in front of it).

Default: -10

CMExpirationWarning2

Standard Description: e-CM is set up to send second e-mail reminders to Content Managers when navigation menu items are about to expire. This variable sets the number (which should always be a negative value) of days before a navigation menu section's expiration date, that the second e-mail warning is sent to the assigned content manager.

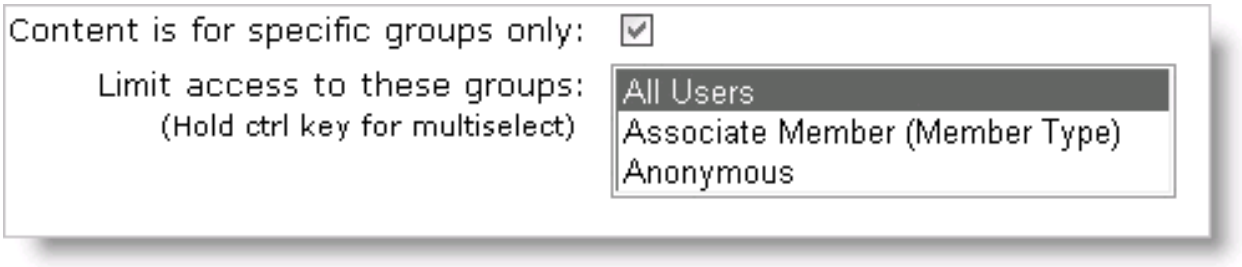
What This Means: How many days in advance of the expiration date should the owner of a content record receive the second warning that it is about to expire? Value should be a negative integer (should have a minus sign in front of it).

Default: -5

CMMemberTypeSelectSize

Standard Description: This variable determines the height of the member types multiple select box displayed on the content properties page.

What This Means: When a user selects the Limit access to these groups checkbox in a content record properties page, how many rows should there be in the multi-select box? If you have a large number of member types in use with e-CM, you will probably want to make this value larger to make it more convenient to find and select the groups.



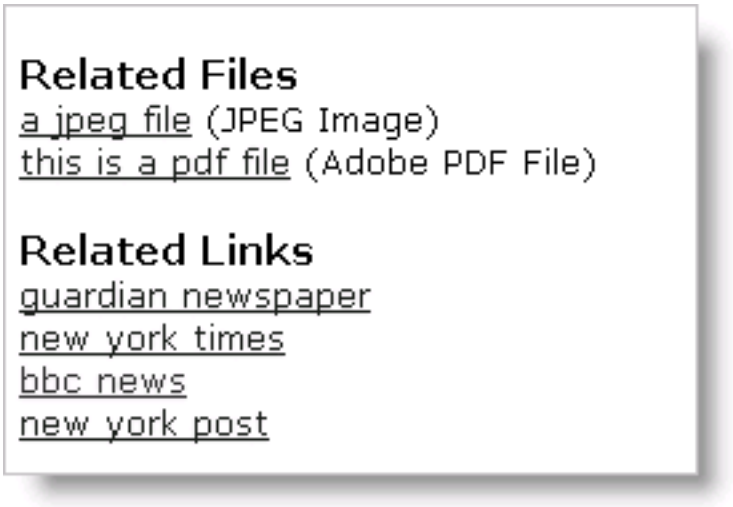
Limit Access Multi-Select, Content Record Properties Page

Default: 4

CMNewWindowFileTypes

Standard Description: With e-CM, you can upload different types of data (e.g., Word documents, Excel spreadsheets, and PDF files) in Content Records. This variable indicates which file types will be opened in a new browser window when the end-user clicks on the link at the front-end.

What This Means: When you upload files in a content record, which types should open in a new browser window? By default, the types are xls, pdf and doc. The overall list of types is built from the File_Type_Ref table.



Uploaded Files in a Content Record

Default: PDF,DOC,XLS

CMNewWindowParameters

Standard Description: Certain files such as Word documents, Excel spreadsheets, and PDF files may be opened in a new browser window (determined by the value of the CMNewWindowFileTypes variable) when an end-user clicks on the navigation link at the front-end. This variable allows you to modify the JavaScript that controls various attributes of the new window.

What This Means: This determines the size in pixels and the properties of new browser windows opened to show files. This takes the form of a comma-delimited list of name-e=value pairs. In this list, the value 0 is false; 1 is true.

Default: width-
=800,heigh-
ht=600,toolbar=0,directories=0,menubar=0,status=0,resizable=1,scrollbars=1.

CMResetAllContentExpDate

Standard Description: This variable determines whether or not to refresh expiration dates for content records, when a navigation item is published. If it's set to True, a content record will have a new expiration date every time it is published. If set to False, the content record will have a new expiration date when the content has actually been modified.

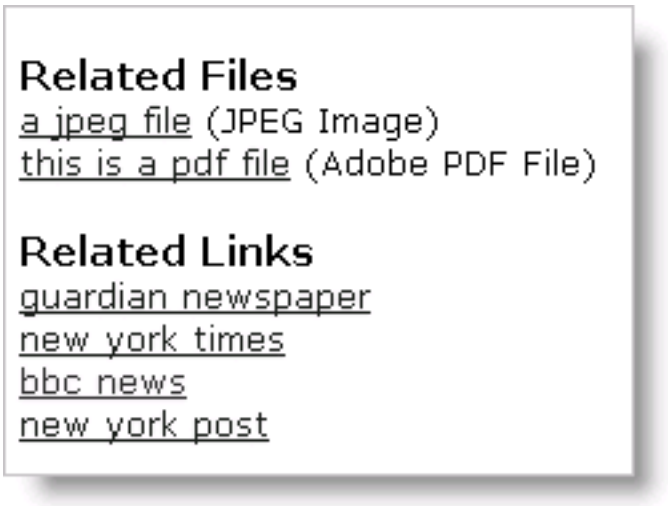
What This Means: In effect, this variable determines whether simply re-publishing a content record will re-set the expiration date (and thus stop the e-mails to the content record's owner) or if the user must actually modify the content as well. The advantage of the "True" setting is that it is easier for content producers. The advantage of the "False" setting is that it forces content producers to actually look at the expired content.

Default: True

CMShowFileTypes

Standard Description: With e-CM, you can display multiple content records as a list of records. These content records may contain data types such as Word, Excel and PDF files. Similarly, you may upload multiple files to a single content record. This variable indicates whether or not the file type description should be displayed at the front-end next to the content record title.

What This Means: When you upload files to a content record, will the filetype be displayed after the link. This is a nice courtesy to users, especially when clicking on the link will launch a helper application such as Acrobat Reader™ or result in the file being rendered in the browser.



File Types Displayed in a Content Record

Default: PDF,DOC,XLS

SMLevel1ExcludeLists

Standard Description: This variable determines the Level 1 navigation menu items that will not be displayed on the Site Map.

What This Means: When you choose content type Site Map in a navigation item, e-CM automatically creates a content record that will show users a site map on the front end. If there are level-one items that you do not wish to appear on the site map, you may select them in the SMLevel1ExcludeList multi-select box. The list in the multi-select includes all level-one items on all websites. A site map lists only the navigation items of the site it is on. Since the site map is dynamic, there is no need to re-publish it after changing your selections, although you will need to click the Refresh button at the bottom of the site settings page to make your changes “live.”

Default: Null

Client Settings Not Visible to User

CMWEPLicenseKey1

Standard Description: The variable sets the license key for the HTML Authoring tool (eWebEditPro 2.0 from Ektron) used in Content Manager.

What This Means: The web editor's license key. If this key is incorrect, not entered, or expired, users will see an “Invalid License” warning when they attempt to edit HTML in Content Manager.

Default: The default is not meaningful, as every instance of CM will have a unique license key.

Configuration Settings

There is generally no reason for customers to change configuration settings. We will include “what this means” explanations for a few of the settings which you might possibly have some reason to change.

CMDefaultContentTitleLength

Standard Description: This variable specifies the character limit for the name of published files.

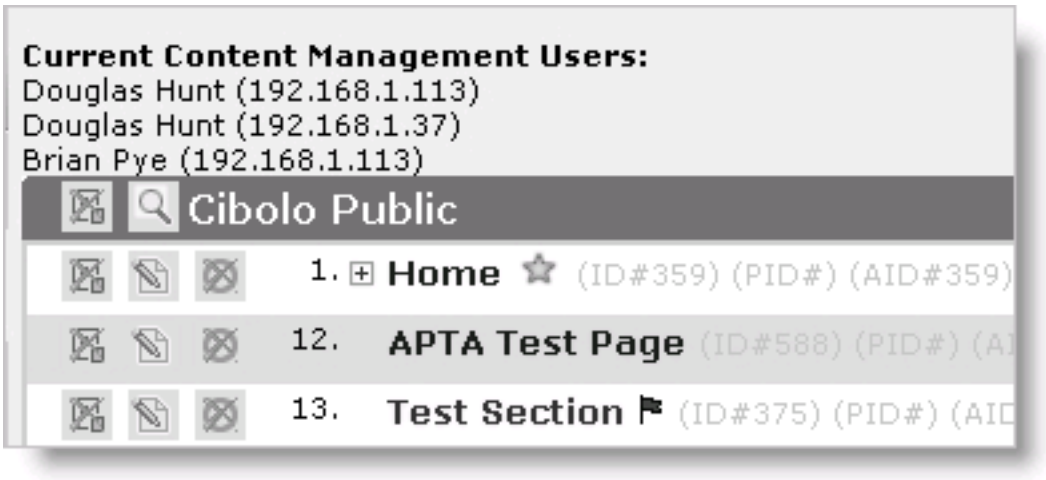
What This Means: When publishing very deeply-nested sites (many sub-levels of navigation), there is a possibility of bumping up against the 260-character limit for Windows 2002 path lengths. This variable can give a little extra “headroom” by limiting the length of the published files. This variable is not really needed except in sites with very deep navigation. It will only affect the names of the files, not what the user sees on the front end (unless they like to read long URLs).

Default: 20

CMDisplayDebugInfo

Standard Description: This variable determines whether or not information such as Nav_Menu items ID, parent ID, ancestor ID, and sort order is displayed in the administrative interface. Set the variable to 'false' to suppress the information.

What This Means: Debug information is often used during site setup and content migration. While debug information is not particularly annoying (it is “ghosted in” in light gray text) you probably won't want to use it on your site(s) once you are up and running. One useful feature of debug output is that it lists logged-in administrative users at the top of site navigation lists. Some customers use debug info because they like this feature.



A Site Navigation List w/ Debug Output

Default: False

CMe-CMFlag

Standard Description: Set this variable to 'True' for e-CM installations.

What This Means: This variable will be set to true if e-CM is integrated with e-Series, false when it is being run as a standalone application.

Default: True

CMGraphicalNavMenu

Standard Description: This variable indicates whether the graphic template used on your site will utilize graphics or HTML for navigation links at the front-end.

What This Means: Will your site use buttons for navigation. This would almost always be set to “True.”

Default: True

CMHTMLMaxLineLength

Standard Description: This variable sets the maximum number of characters for HTML content edited with eWebEdit Pro or the text editor. When saving HTML content, lines will

be broken at this value before going to the database. Set this variable to 0 (zero) to disable line breaking.

What This Means: This actually has nothing to do with how the user experiences HTML editing in Ektron, it has to do with where line breaks are put when the HTML file transmitted via SMTP. This variable is really here only for the convenience of helper programs which might allow users to subscribe to HTML content and can safely be left alone.

Default: 72

CMPublishingMaxNumOfAttempts

Standard Description: The number of tries publishing servers will attempt before marking a content record as failed.

What This Means: After the specified number of attempts, e-CM will stop trying to publish and write to the error log for the content folder or navigation item.

Default: 3

CMSendEmailOnApprovalRequest

Standard Description: Send e-mail to content approver when content is requested for approval.

What This Means: When a content producer without approval authority requests an approval, do you want the system to automatically send an e-mail to members of the authority group which owns the content who do have approval authority? If set to “False,” requests will still show up in the Task List, but no e-mails will be generated.

Default: True

CMSetSectionFromSession

Standard Description: This variable determines what section to pass to a template when loading content from content folder. If it's set to True, current section is passed. When its set to False, section specified in e-CM is passed.

Default: True

CMSetTemplateFromSession

Standard Description: This variable indicates whether to load a linked content in the current template or in the template specified in Content Manager. Set this to True to load in the current template.

Default: True

CMTagging

Standard Description: This variable determines whether or not the Content Tagging system will be used with the e-CM module. It should be set to 'true', if the Content Tagging module has been purchased.

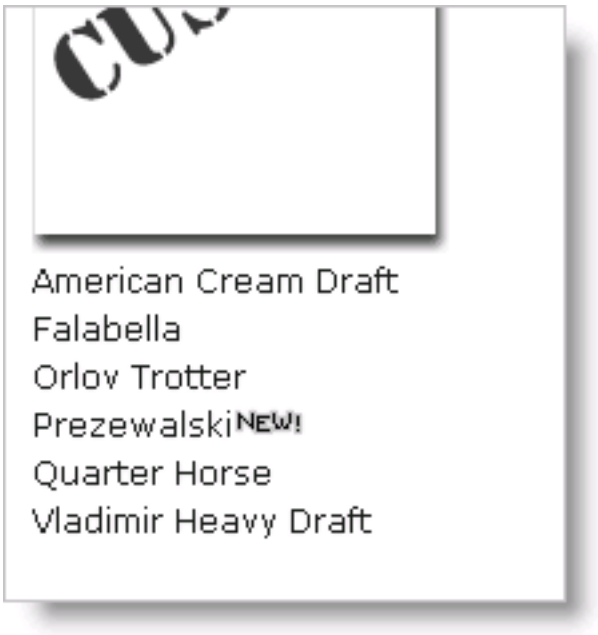
Default: True

CMUseImportantUntilDate

Standard Description: e-CM allows for the categorization and resultant display of content records based on date. This variable should be set to 'true' if this above functionality is used, i.e. if a system that will prioritize search results, or display a new icon next to certain items is used.

What This Means: If you set this to “false,” the ability to display a “new” icon next to links to content records on tagged pages goes away, and the “Mark as Important Until” input which drives this functionality is hidden in the content record properties form. The new icon is located at Graphics/new.gif.

Mark as Important Until



Content Record Marked as "New" on Tagged Page

Default: True

CMUseMembersOnly

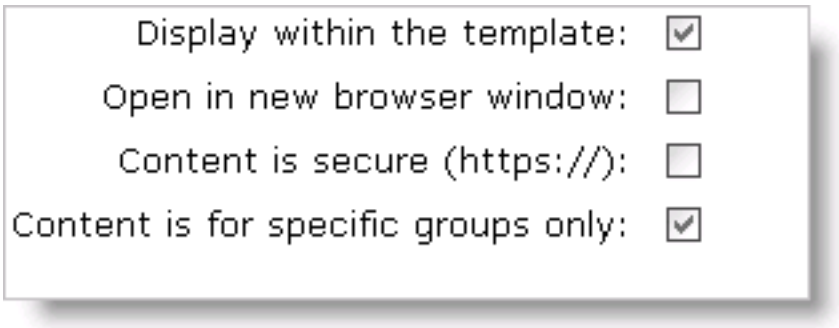
Standard Description: e-CM allows for the delineation of specific content as 'for members only'. This variable should be set to true if this function is to be used.

Default: True

CMUseMemberTypes

Standard Description: In addition to allowing for 'members only' content, e-CM allows you to set member access to content records based on member types. This variable determines whether or not 'member types' will be used in 'members only' content. The variable should be set to 'false' if 'members-only' content is to be made available to ALL members.

What This Means: When you check “Content is for specific groups only” in a content record properties page and this value is set to True, you see a multi-select box listing your member types. Only members of the selected types can see the content. If you set this value to False, no multi-select box appears. If you check the box, all members are allowed to see the content and all non-members are excluded.



CMUseMemberTypes Set to False (No Multi-Select List of Member Types)

Default: True

CMUsePrinterTemplate

Standard Description: This turns on printer template option and allows producers to specify printer template header and footer.

What This Means: If set to true, each website may have a printer template (typically a full-width page without graphics) specified in its properties form. This would generally be accessed via a link on the navigation section of the regular template.

Default: True

CMUseTextOnlyTemplate

Standard Description: This turns on text only template on Website form and allows producers to specify text only template header and footer.

What This Means: If set to true, each website may have a text-only template specified (no buttons or extraneous graphics). This would generally be accessed via a link on the navigation section of the regular template. Once the text-only template is selected, the choice “follows the user around” as they go through the site.

Default: True

CMWEPPath

Standard Description: This variable sets the web path for the Ektron web editor, when the license for the authoring tool has been purchased.

Default: Admin/eWebEditPro30/

CMWEPWebRoot

Standard Description: The variable sets the web path to the edit folder where Ektron web editor files are located.

What This Means: Full URL and path to the Ektron WYSIWYG editor files.

Default: Will vary, so default is not meaningful.

DefaultNavMenuSection

Standard Description: In Application.cfm, session.TemplatePath is initialized to be /Template.cfm?Section=#application.DefaultNavMenuSection#. The app var determines what Section of the site defaults to a first-time visitor who clicks a URL that doesn't specify a Section.

What This Means: Typically most e-CM URLs will contain a “Section=xxx” name value pair. Among other things, the section determines the appearance of navigation (for example, if the URL contains “Section=News,” the user will see the navigation for the News section). The value of this variable determines which section will be displayed if a user hits the website and immediately clicks a link on the site which, for whatever reason, includes a URL without a section (for example, a direct link to content in a folder). The default value, “Home,” is usually a good choice.

Default: Home

SourcePath

Standard Description: This variable stores the name of directory where content source files are stored. When changing this value, make sure to create a folder for it in the file root.

What This Means: When you upload files to attach them to a content record, they have to go somewhere. Where they go is a directory called “Source” which is one level up from the web root for security reasons. In other words, on a typical website, it is at Source/WWW, not WWW/Source. If you need to change the name of this directory (for

example, if there is already a directory with that name), you can change the value of SourcePath.

Default: Source\

Configuration Settings Not Visible to Clients

CMAdminWebsiteKey

Standard Description: This variable stores Website key for Admin website.

What This Means: The admin website is the administrative interface itself, which is built in Content Manager. It needs a license key in order to function.

Default: The default value is not meaningful.

CMContentGroupGreenBarColor

Standard Description: This variable determines alternate bar color in Content folders or tagging screens.

What This Means: This value, generally a “hex color,” determines the color of the “striping” in the administrative interface's display of the content folders and the tagged page editing interface.

Default: #F8E8B9

CMNavMenuGreenBarColor

Standard Description: This variable determines alternate bar color in Content folders or tagging screens.

What This Means: This value, generally a “hex color,” determines the color of the “striping” in the administrative interface's display of the navigation menu.

Default: #D1DDEA

CMShowComponentScriptDropDown

Standard Description: This variable determines whether or not to show "Type of content" drop down in navigation properties.

What This Means: The type of content drop-down list is used to display e-Series modules inside the website's template. It would be set to “False” for sites which do not have e-Series or do not intend to use it in this manner.

Default: True

Session Settings

Session settings, which control parts of an individual user's experience, exist in the database, but are often given their values by the code as the user performs certain actions. Their presence in the database simply serves to instantiate them (ensure that they exist) when needed. For this reason, most session variables do not actually have a value in the database (and do not need to have one). There are very few reasons to change the values of session variables, and most are not visible to clients.

CMBorderColor

Standard Description: This variable specifies border color used in Content Management System.

What This Means: Used as a border around HTML tables in various places in the administrative interface (e.g. the content record properties page).

Default: #D1CDBB

CMCurrentFolderID

Standard Description: This variable stores the ID of the content folder the user is currently looking at.

Default: NULL

CMEditorRedirectURL

Standard Description: This variable determines where the user will be directed after using the web editor.

Default: None.

CMFolderDisplay

Standard Description: List of directory names which determines whether a directory on ImageIndex.cfm is open, revealing the images it contains.

Default: None.

CMFolderSectionDisplay

Standard Description: List of NavMenuIDs which determines whether a section on ContentFolders.cfm is open, revealing its descendants.

Default: NULL

CMNavContentGroupInd

Standard Description: This variable indicates whether the user is currently in Site Navigation section or Content Folders section.

Default: N

CMSaveTemplatePath

Standard Description: This variable is used in Surf-to-Edit feature to take the user back to the page he/she came from.

Default: None.

CMSectionDisplay

Standard Description: List of NavMenuIDs which determines whether a section on NavMenuModify.cfm is open, revealing its descendants.

Default: None

CMSuperAdminFlag

Standard Description: This variable stores whether the current user is a super administrator for Content Management System. A user is a super administrator when he/she belongs to super administrator group.

Default: False

CMSurfToEditContentID

Standard Description: This variable stores the ID of a content record the user is trying to edit through Surf-to-Edit feature.

Default: 0 (zero)

CMSurfToEditReturnURL

Standard Description: This variable stores the URL of the page the user is trying to edit through Surf-to-Edit feature.

Default: NULL

CMTextOnlyTemplate

Standard Description: If true, side and top nav links remain dynamic so that the user can click around the site without being bounced back into the graphical template.

What This Means: Makes the “text-only template” choice “sticky” for a user's session, so they do not see the graphical template again until they select it.

Default: False

CMWebsiteKey

Standard Description: This variable stores the key of the current Website the user is managing.

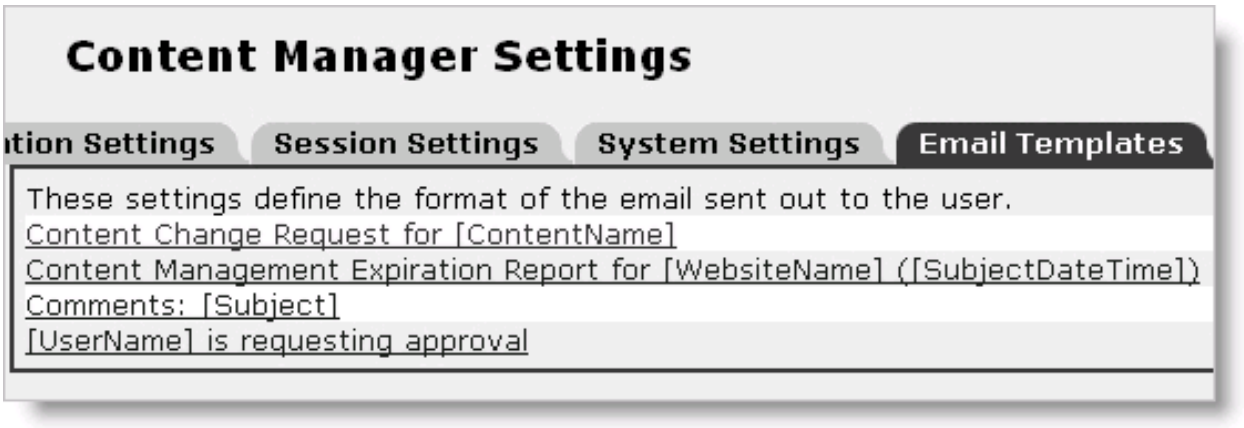
Default: NULL

System Settings

There are no system settings for Content Manager.

e-CM Email Templates

Email templates allow you to tailor e-mails sent by the application (for example, the notification sent to a content owner when a content record is expiring). Email templates contain both text and variables (for example, the name of the person being e-mailed).



To edit an email template

1. Log in to the e-CM administrative interface.
2. Select Admin.
3. Select Content Manager.
4. Select the Email Templates tab. Select the appropriate template link to edit.
5. You may change any text in the “Email text” box, using any of the variables listed on the right (the name of the variable and their use in the default text generally makes their purpose clear). Note that you may also add a specific “From” address as well as CC and BCC lines.
6. Click Save.
7. Click Send Test Email. A test e-mail is sent to the account to which you are logged in.

   Note: In the test e-mail, the variables will appear as they do in the form, for example, [TaskListURL]. When an e-mail is sent to an actual user, they will see the value of the variable, not the variable itself.

   Email Templates in e-CM

   e-CM uses the following email templates:

- Content Change Request for [ContentName]: Generated when someone using the surf-to-edit function has submitted a content request. E-mail is sent to content record owner.

- Content Management Expiration Report for [WebsiteName] ([SubjectDateTime]): Notifies producers when content and/or Nav_Menu sections are nearing their expiration date (note: text cannot be altered by admins).
- [UserName] is requesting approval: When a content producer who lacks approval rights requests approval of newly created/updated content, an e-mail will be sent to the producers with approval rights to notify them of that request.
- Indexing of Collection [CollectionID] [Action}: E-mail that is sent when the main collection processing is complete to notify administrators of the search indexing status.

Members-Only Text Files

e-CM gives you the option of protecting content so that it may be viewed only by logged in users. You may further restrict this to particular types of members. e-CM uses three text files to display messages to users who have requested a URL which contains members-only content. The text of these files should be changed before the site goes into production. Note that while these are text files, they do contain ColdFusion CFOUTPUT tags, which should not be removed.

The default text of each file includes a full physical path to the file so you can edit it to insert the text of your choice.

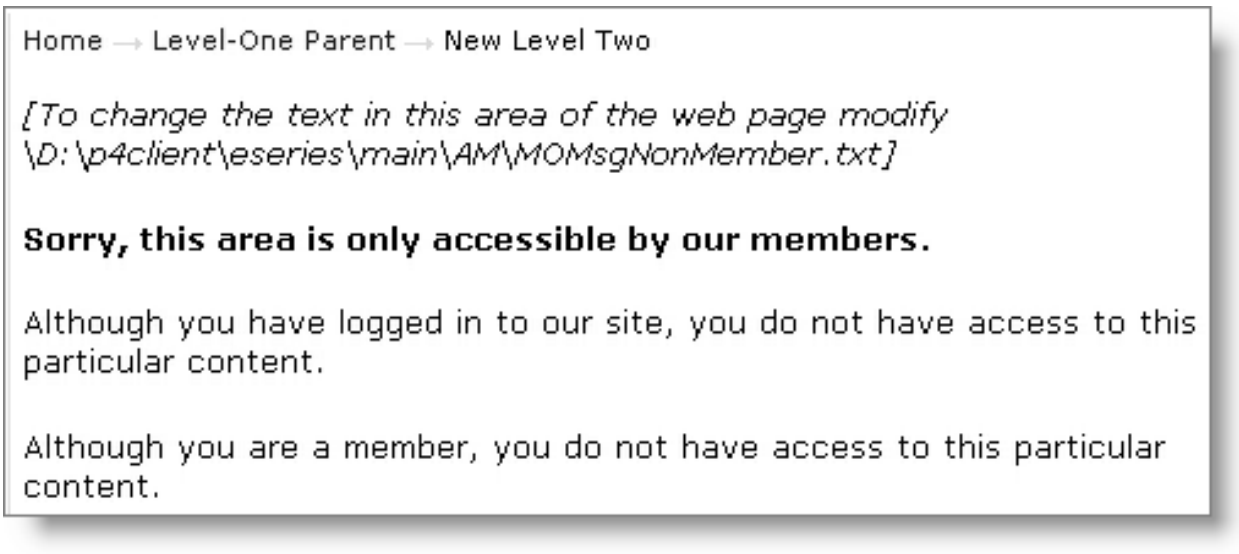
User Not Logged in

The first file, MOMsgNotLoggedIn.txt, is displayed to users who have not logged in.

Default MOMsgNotLoggedIn.txt

User Logged in, Not a Member

The second file, MOMsgNonMember.txt, is displayed to logged-in users who are not members.



Default MOMsgNonMember.txt

User is Logged-in Member, Not the Right Type of Member

The third file, MOMsgInvalidMember.txt, is displayed to logged-in members who do not match the member type(s) allowed to see the specific content requested.

Default MOMsgInvalidMember.txt

Note: When you edit these files, make sure not to remove the ColdFusion CFOUTPUT tags.

Tagged Page Settings

In the Tagged Page module, all settings are located under “Configuration Settings” and all are visible to the client.

Configuration Settings

GEImageMemberOnly

Standard Description: This variable indicates an image to show when content is members-only.

What This Means: On a tagged page displaying links to content records, some of the links may be to content-restricted to members only. This should be path information and a filename for an image to be displayed next to members-only links.

Default: Graphics/Key.gif

GEImageNewContent

Standard Description: This variable indicates the image to show when content is marked as new/important.

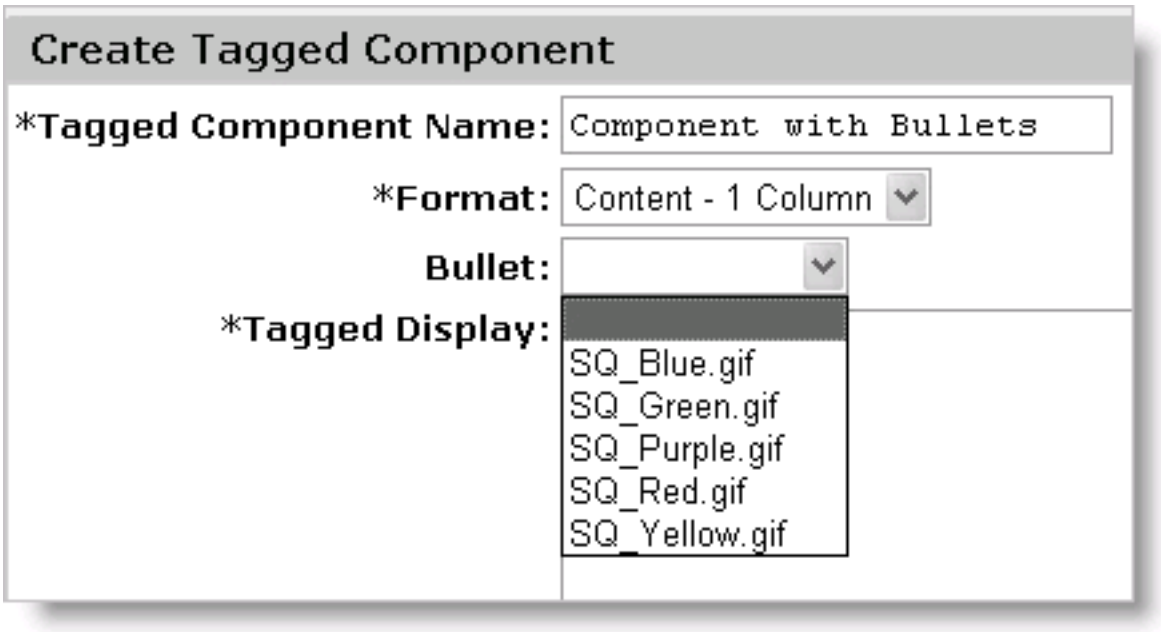
What This Means: One of the options for a content record is the “Mark as important until” date. If a date is entered, a “new” icon is displayed next to any tagged page links to the content record. This setting specifies the path and filename of the image.

Default: Graphics/New.gif

TPBulletList

Standard Description: List of bullet images.

What This Means: This should be a comma-delimited list of image files in the graphics directory. These will appear as a drop-down list for use in custom tagged page components. The images must actually exist in the Graphics directory or broken links will appear.



Bullet Images in Tagged Component Form

Default: SQ_Blue.gif,SQ_Green.gif,SQ_Purple.gif,SQ_Red.gif,SQ_Yellow.gif

TPCachedPageResetMinute

Standard Description: Number of minutes to pass before re-caching tagged pages.

What This Means: In order to speed response time when users retrieve tagged pages, which require extremely complex database operations to build, those pages are cached (stored) in the server's memory the first time a user views them, and then remain unchanged in memory until they “time out (the timeout interval depends on the value of tagged page configuration variable TPCachedPageResetMinute). When a page times out, it is removed from memory and re-cached by the first user who requests it.

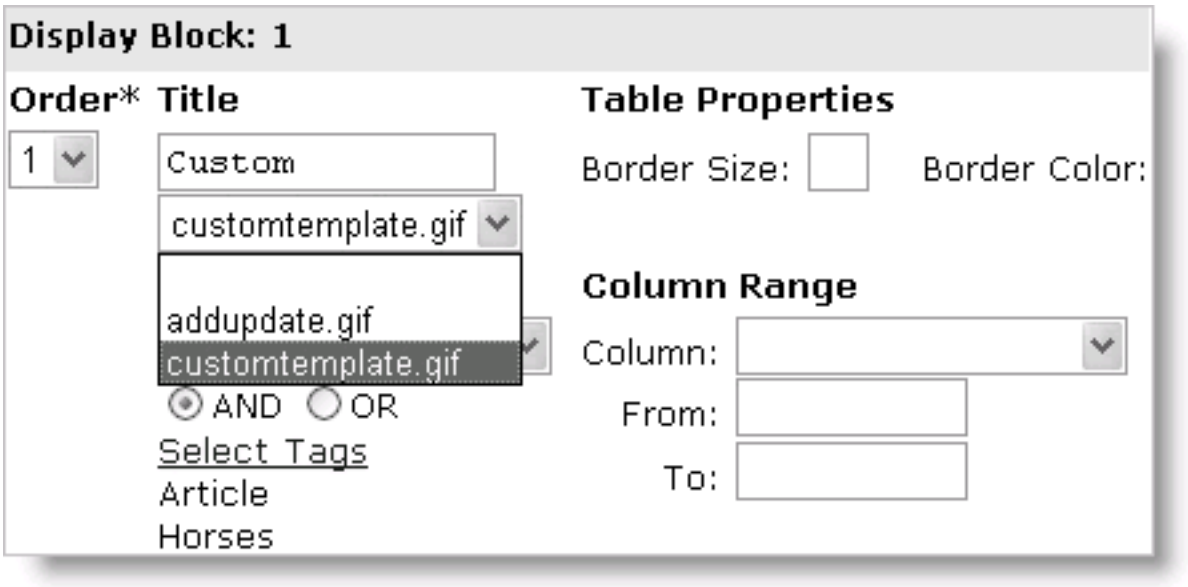
This produces much faster response times (since computer memory is much faster than computer hard disks), but it also means that updates which affect tagged pages will not “go live” immediately. If you want your updates to go live, you must clear cached pages. This removes the pages from memory and allows fresh copies to be re-cached when users next hit them.

Default: 1 (Note: this setting is intended to be an appropriate default for development, not for sites in production). For development, you can also set it to zero to turn off caching.

TPImageWebPath

Standard Description: Location of tagged page related images.

What This Means: Two sets of tagged page related images are stored here: Title images (replacing text headlines over an individual component) and view all images (used in place of text view all messages). Note that view all images must be located underneath the TPImageWebPath directory in a specially named directory called “ViewAll.”



Title Image

Default: Images/TPImage

TPRowPerPage

Standard Description: When "View All" is clicked, the maximum number of rows to show per page.

What This Means: When a user clicks on a “View All” link from a tagged page, a Next/Previous functionality is provided, allowing users to page through potentially long lists of records. This value determines how many records are shown per page.

Default: 20

Site-Search Settings

Client Settings Visible to the Client

SECollectionNoticeEmail

Standard Description: The e-mail to which the search collection notifications are to be sent. E-mail is sent after the main content files collection is indexed. You must set SESendCollectionNotice to True to enable the sending of this e-mail. The e-mail to be sent is maintained in the e-mail template; the e-mail template must be enabled.

Default: NULL

SEExceedMaxResultsMessage

Standard Description: This text message is displayed when the user exceeds the value of the CCSEMaximumResults variable.

Default: Your search criteria returned over 1000 records. To see more results, please modify your query to add more criteria.

SENoResultsMessage

Standard Description: This message is displayed to the user when there are no results matching their search criteria. This message could potentially include some tips on how to get results, such as trying fewer criteria or placing the search inside quotes.

Default: No search results match your specified criteria. Please try again.

SEProblemMessage

Standard Description: This message appears when there is a problem with the user's search criteria. This message should also include some hints on how the user can rewrite their search.

What This Means: If the search criteria is too broad, no items are returned by the search. If this occurs, the system automatically searches the collections for the value of the SESearchRetestTerm to determine if the search results are too broad or if there was another issue with the search.

Default: There was a problem running your search. Please try again.

SESearchRetestTerm

Standard Description: This term has very limited results in order to test whether or not a query is simply too broad or actually returns no results.

Default: 30

SESendCollectionNotice

Standard Description: This variable determines whether or not an e-mail should be sent once the collection processing has been completed.

Default: True

SETooManyResultsMessage

Standard Description: This message appears to the user when the search criteria is too broad and returns too many results.

Default: Your search criteria are too broad and return too many results (over 8,000). Please try your search again with more criteria selected.

SEUseAdvancedRelevancy

Standard Description: This variable determines whether or not to use the advanced relevancy scoring process. If true, then this processing will be used, otherwise the standard relevancy processing will be used.

What This Really Means: This setting controls the various relevancy settings (for example, “SESearchDescriptionHint”) that allow you to adjust the relevancy weightings of specific parts (Title, Keywords (including assigned tags), Description, and Body Content) of the content record. If SEUseAdvancedRelevancy is set to “True,” these settings are enabled. If set to “False,” these variables are disabled and the search will give equal weight to all parts of the content record which are indexed.

Default: False

Configuration Variables Visible to the Client

SEDocTypesICID

Standard Description: Tags displayed as document type in search form when "Search by type" is used.

What This Means: The drop-down list for SEDocTypesICID shows all the tagging categories used in this instance of Content Manager. When you select one of the tags, its children (but not the tag itself) will display as checkbox options in the “Search by Type(s)” section. This section appears if SEUseDocTypes is set to “True” (the default is “False”).

Only the first-level children of the tag you select will appear, not any children they might have.

Search by Type(s) Section

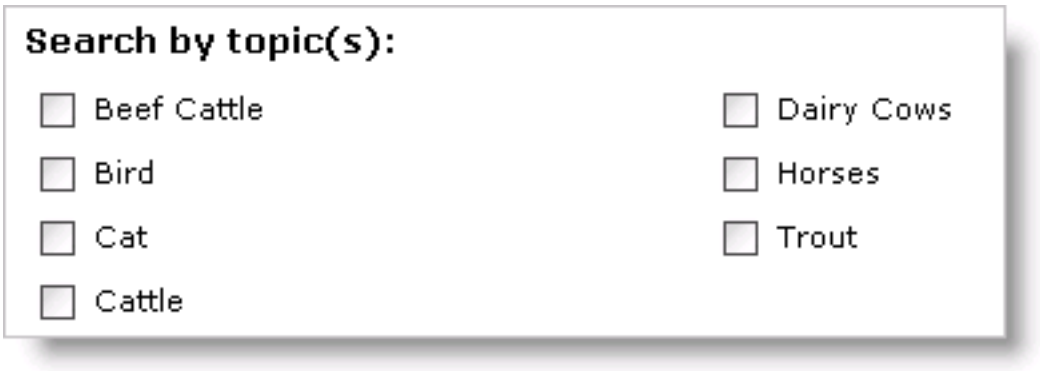
Default: 0 (zero)

SEInterestsICID

Standard Description: Tags to be displayed as topics in search form when "Search by topics" is used.

What This Means: The drop-down list for SEInterestsICID shows all the tagging categories used in this instance of Content Manager. When you select one of the tags, its children (but not the tag itself) will display as checkbox options in the “Search by Topic(s)” section. This section appears if SEUseInterests is set to “True” (the default is “False”).

Only the first-level children of the tag you select will appear, not any children they might have.



Search by Topic(s) Section

Default: 0 (zero)

SEMaximumResults

Standard Description: This variable defines the maximum number of results that are returned in a search. This value must be less than 8000.

Default: 1000

SESearchBodyHint

Standard Description: This value is the weight of relevancy given to the body text of a record.

What This Means: If SEUseAdvancedRelevancy is set to True, this variable will determine the relative weight given to the body text of a content record.

Default: 30

SESearchDescriptionHint

Standard Description: This value is the weight of relevancy given to the description for a record.

What This Means: If SEUseAdvancedRelevancy is set to True, this variable will determine the relative weight given to the description of a content record.

Default: 20

SESearchKeywordHint

Standard Description: This value is the weight of relevancy given to the keywords for a record.

What This Means: If SEUseAdvancedRelevancy is set to True, this variable will determine the relative weight given to the keywords section of a content record.

Default: 50

SESearchTitleHint

Standard Description: This value is the weight of relevancy given to the title for a record.

What This Means: If SEUseAdvancedRelevancy is set to True, this variable will determine the relative weight given to the title of a content record.

Default: 40

SESectionsICID

Standard Description: Tags to be displayed as sections in search form when "Search by sections" is used.

What This Means: The drop-down list for SESectionsICID shows all the tagging categories used in this instance of Content Manager. When you select one of the tags, its children (but not the tag itself) will display as checkbox options in the “Search by Site Section(s)” part of the search page. This section appears if SEUseSections is set to “True” (the default is “False”).

Only the first-level children of the tag you select will appear, not any children they might have.

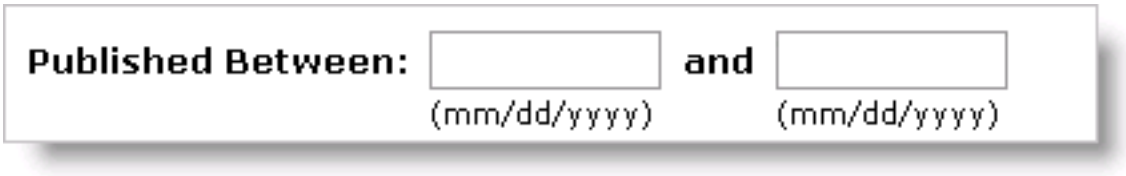
Search by Site Section(s)

Default: 0 (zero)

SEUseDateRange

Standard Description: Indicates whether to use date range in search form.

What This Means: The content's published date is used. Two specific dates can be specified and all content that was published between these two dates is returned.



Search Date Range

Default: True

SEUseDocTypes

Standard Description: Indicates whether to use "Search by type" (document type) in search form.

What This Means: If this value is set to “True,” a “Search by Type(s)” section will appear in the search form, including the tags selected in the SEDocTypesICID drop-down list.

Default: False

SEUseInterests

Standard Description: Indicates whether to use "Search by topic" in search form.

What This Means: If this value is set to “True,” a “Search by Topic(s)” section will appear in the search form, including the tags selected in the SEInterestsICID drop-down list.

Default: False

SEUsePostedWithin

Standard Description: Indicates whether to use "Posted Within" as a search criteria in search form.

What This Means: If SEUsePostedWithin is set to true, the search page will include the options.

SEUsePostedWithin Set to True

Default: False

SEUseSections

Standard Description: Indicates whether to use "Search by sections" in search form.

What This Means: If this value is set to True, a Search by Site Section(s) option will appear on the search page, using the tags selected in the drop-down list.

Default: False

SEUseSummaryOption

Standard Description: Indicates whether or not to allow users choose view search results withor without a summary. If this is false, the summary is always displayed in search results.

What This Means: Will user have choice whether or not to display summary (description) in search results?

Default: False

Configuration Settings not Visible to Client

SECollectionPath

Standard Description: This variable specifies the path to the collection files are, relative to FileRootPath.

Default: Collections\

Note: This setting must be correct!

SEComponentCodes

Standard Description: This variable holds the list of components to be used in search.

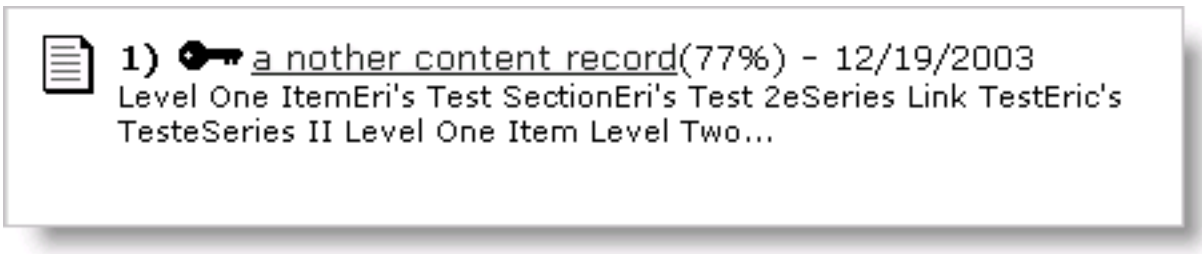
What This Means: For example, if CM is the only component to be searched, the value of the variable would be 'CM.' As other Active Matter components are added, you can use a comma-delimited list to specify other components, based on their ComponentCode in the Component_Ref table.

Default: CM

SEDisplayDefaultIcon

Standard Description: The default icon shown on search results.

What This Means: You can use this variable to specify a graphic in the Graphics/ directory that will display next to a document in search results.



SEDisplayDefaultIcon (Default Value)

Default: document2.gif

SEDisplayDefaultIconDesc

Standard Description: Search default icon description

What This Means: This is the “alt” text for the icon.

Default: Document

SEDisplayIconPath

Standard Description: Path to the folder that contains the search icon images. This path is referred to in a search operation for icons.

Default: Graphics\Search\

SEDisplayIcons

Standard Description: Toggles search result Icons

What This Means: This variable turns the display of icons in the search lists on and off.

Default: True

SEDisplayShowKey

Standard Description: Indicates that the Member Only key (icon) should be displayed

What This Means: If this option is set to true, a “members only” symbol such as a key will be displayed on any search results.

Default: False

SEExcludeList

Standard Description: A list of search collections to exclude from the site search.

What This Means: If you have any other applications which use Verity™ search collections, you may wish to exclude these collections from site search.

Default: Resume,ResumeFile

SEResultsPerPage

Standard Description: Maximum number of records to display per search page on SearchDisplay.cfm.

Default: 25

SESummaryBreak

Standard Description: Maximum number of characters to display in the Search Results Summary for each matching record.

What This Means: If the summary exceeds this number of characters, only the first n characters will be shown in search results.

Default: 200

SEVerityExePath

Standard Description: The file path to the Verity mkvdk.exe file.

What This Means: Full path to verity search mkvdk.exe file.

Default: D:\CF\lib_nti40\bin\mkvdk.exe

Note: This setting must be correct! This setting often changes when moving to a other servers. If the reindex.out file is empty or the indexing process takes a very long time to run, the SEVerityExePath setting is probably not correct.

Setting Content Producer Preferences

Setting Producer Preferences

e-CM allows content producers to set preferences which control many aspects of their administrative experience.

To view or change preferences

1. From the e-CM Admin page, select Content Managers.
2. Make the appropriate changes.
3. Click Save.

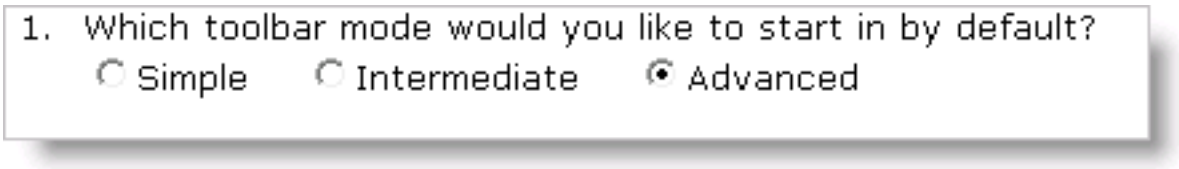
Note: When a new producer is set up for the first time, all of their preferences will be set to default values. For this reason, the following discussion of the individual preference settings includes information on the default.

Reviewing the Producer Preferences

The Producer Preferences page is set up as a series of questions. How you answer the questions determines the preferences allowed for the user.

Default Toolbar

This option determines which version of the toolbar the user will start with when working with content.

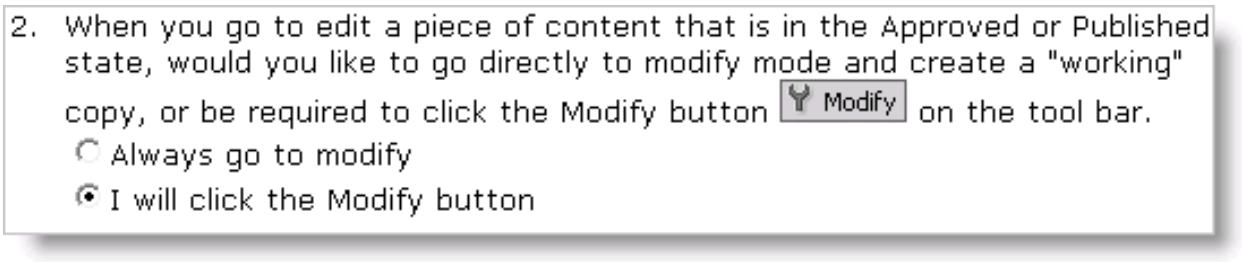


Default Toolbar Options

This does not override the toolbar settings for a user in a particular authority group. If the toolbar selected in preferences is not authorized in the authority group settings, the user will start with the highest level allowed. For example, if a user's preference is Advanced, but the user only has Intermediate permissions in a particular authority group, the user will start with the Intermediate toolbar when working on content owned by that group.

Default: The default toolbar option defaults to Advanced.

Modify Button



Modify Button Options

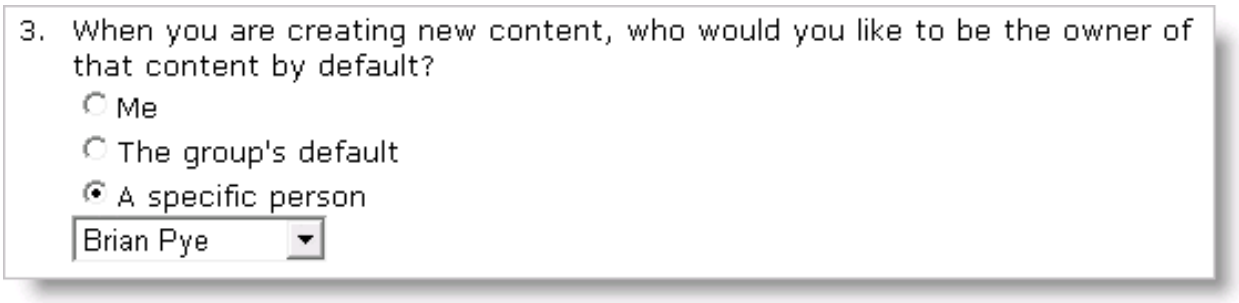
If this option is set to Always go to modify, you will not have to click the Modify button in order to edit content records which are in the “published” state. When you save a change in a content record, it will place the content in a working (red light) state.

If the option is set to I will click the Modify button, the content record will not be placed in a working state until the user clicks the Modify button on the content producers' toolbar. In addition, no editing features (buttons, etc.) will appear until the user clicks Modify.

Default: The modify button option defaults to “Always go to modify.”

Default Owner

This option allows the user to choose who will become the default owner when the user creates a new content record.



Default Owner Options

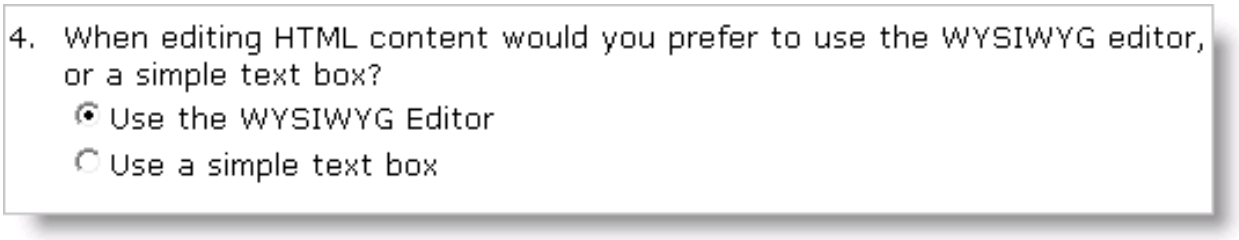
Me - the default owner will be the user.

The group's default - the default owner will be the default owner for the group that owns the navigation item.

A specific person - the ownership will default to that person unless they are not in the group that owns the navigation item, in which case, the default owner will be the default owner for the group that owns the navigation item.

Default: The option defaults to Me.

Editor Preference



Editor Preference Options

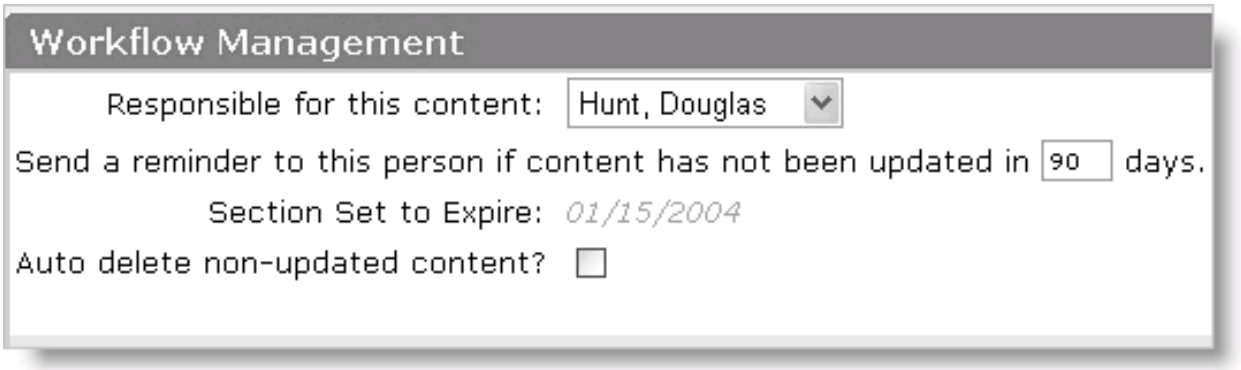
This option allows the user to choose either the WYSIWYG editor or a simple (text area) box for editing HTML content in content records.

Default: The editor preference option defaults to Use the WYSIWYG editor.

Reminder Preference

This option determines the default setting for reminders in any new content records created by the user.

Reminder Preference Options



Reminder in Content Record Properties Page

Default: This setting has no default. If no preference is set by a user, new content will default to whatever the system-wide reminder setting is (90 days by default).

Site Navigation Edit Button

This option determines where the user goes when they click on the Edit Content button on the list of Site Navigation items.

Site Navigation Edit Button Options

Note: If there are multiple content records in the navigation item, the user will be taken to the first content record in the sort order.

Default: The default for the Site Navigation edit button option is The Content Properties page.

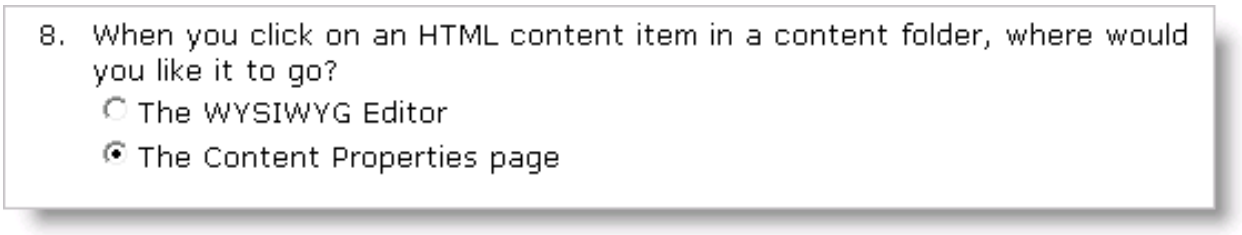
Site Navigation New Content Button

This option determines the function of the New Content button in the list of navigation items.

Site Navigation New Content Button Options

Default: The default for the Site Navigation new content button option is The Content Properties page.

Content Folder HTML Editing



Content Folder HTML Editing Options

When a user clicks on an HTML content icon in a content folder (representing a content record containing only HTML), they can go to the properties page for the content record or directly to the WYSIWYG editor. This setting determines which behavior is enabled (in either case, the user goes to the properties page after saving the HTML file).

Default: The default setting for the content folder HTML editing options is The Content Properties page.

Content Folder New Button

Content Folder New Button Options

Default: The default setting for the content folder new button option is The Content Properties page.

Default Website

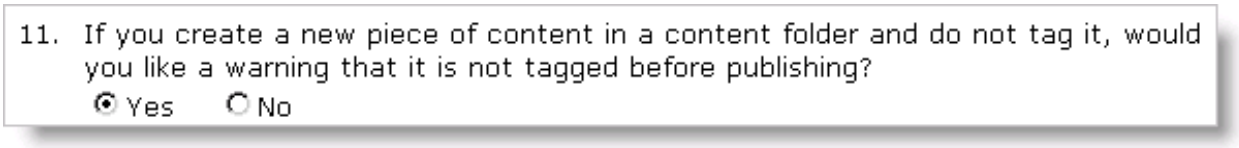
The default website option appears only if a user is a member of an authority group with access to more than one website. This determines which website the user will see by default when they first click on the Site Navigation link in the administrative interface.

Default Website Options

Default: Defaults to the first website in the list.

Tag Warning

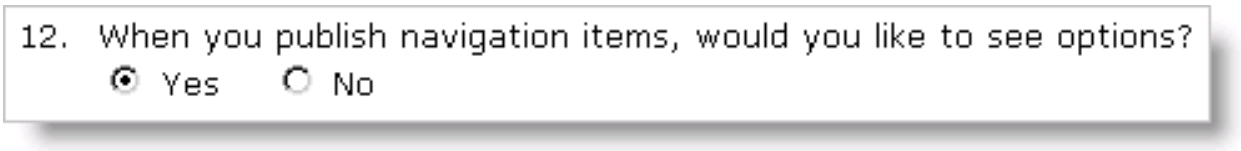
The tag warning option will not appear unless tagging is licensed and the user is a member of an authority group that owns at least one content folder.



Tag Warning Options

Default: The default for the tag warning options is Yes.

Publishing Options



Publishing Options with "Yes" Selected

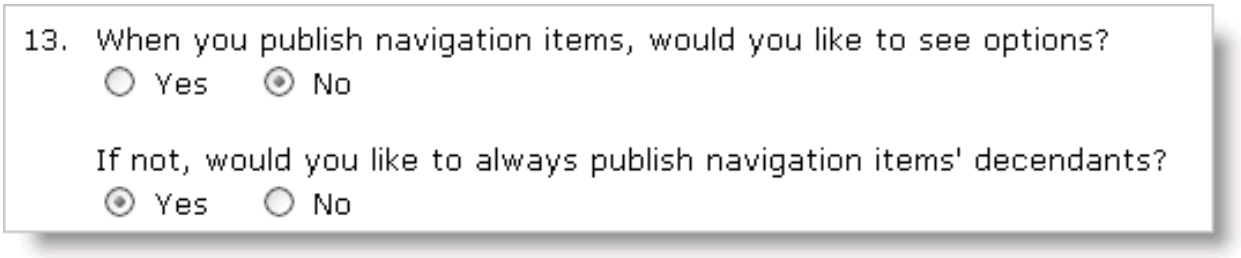
Yes - The user will always see a publishing option screen when publishing a navigation item.

If there are any child navigation items under the item being published, the screen will ask whether any descendant(s) should also be published. In addition, the user will have the option of regenerating content, meaning that all selected content will be published even if CM does not think the content has been changed.

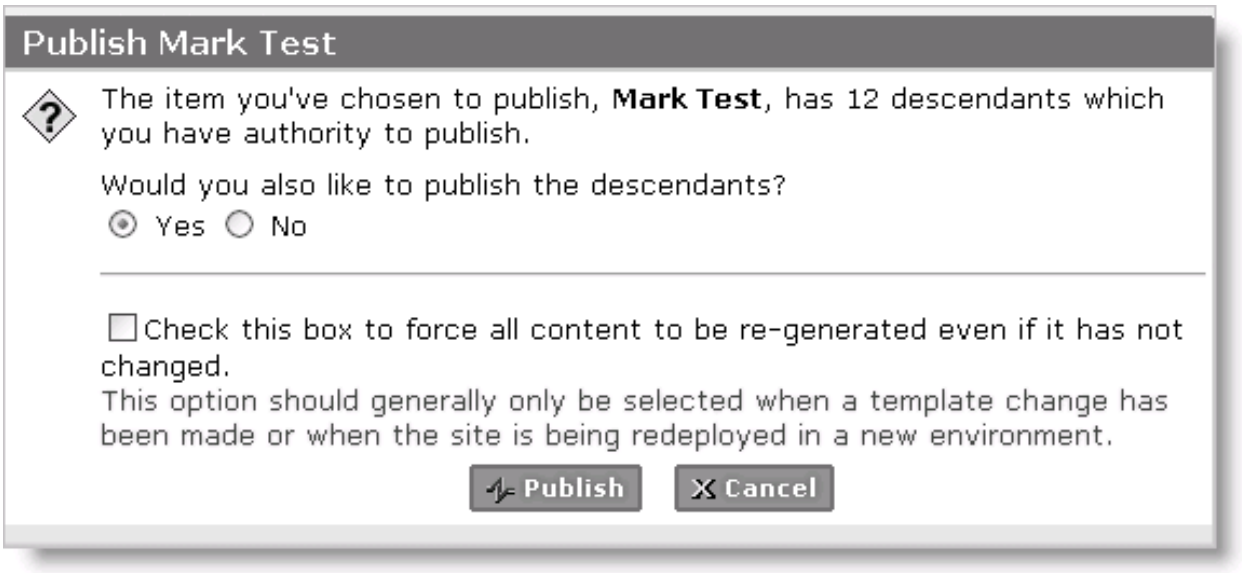
No - If you select no, an additional publishing option displays.

If the user selects No and Yes, any child navigation items will always be published along with the selected parent navigation item.

If the user selects No and No, child navigation items will not be published.



Publishing Options with “No” Selected

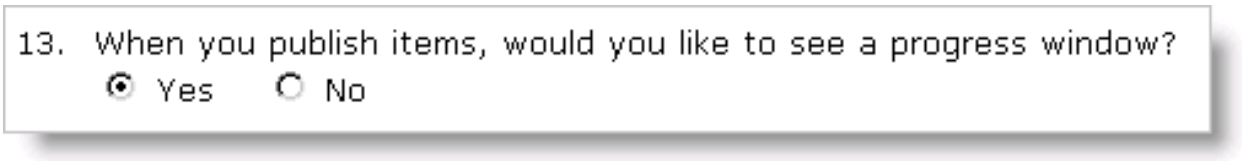


Publishing Option Screen

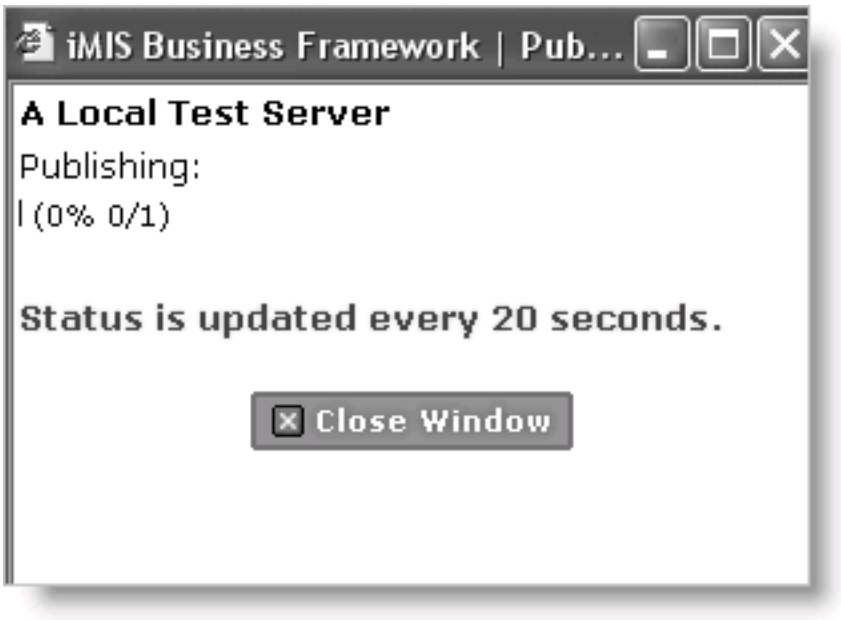
Default: The default for the publish option is Yes.

Progress Window

This setting determines whether the user sees a pop-up progress window during publishing.



Progress Window Options



Publishing Progress Window

Default: The default for the progress window options is Yes.

e-CM Publishing Servers

What is Publishing?

To review, e-CM stores the information that users save in content records (in either navigation items or content folders) and then uses this information to publish the content records as HTML files. The aim of this process is to speed response times for users. web-servers are very quick at serving files, but response times are much longer when pages must be built “on the fly” by retrieving information from a database.

What Does the Publishing?

Publishing is accomplished by one or more Microsoft .NET-based publishing servers (these are “servers” in the software sense of the term, not physical machines). When a user asks e-CM to publish something, e-CM calculates which files need to be republished, then makes an entry in a database table. The publishing server looks at that table every n seconds, and when it finds a job, sends instructions to the ColdFusion application server, which begins publishing. It is the ColdFusion server which actually writes out the

published files (and the ColdFusion server which consumes the lion's share of the resources required for publishing).

There are a number of advantages to this approach as compared to simply submitting a publishing request to the ColdFusion server directly:

- Requests can be queued up, preventing slow downs and “collisions” when multiple users make publishing request in the same time period.
- Since the information required to do the publishing is stored in a database table, it is persistent, which makes the process much more robust. If, for example, the webserver is restarted during the middle of a publishing job, the job will continue to run to completion when the server is started again. If the publishing server runs into an error, it can both store information about the error and re-try the publishing job.
- While there is no way to directly control the % of CPU taken up by the ColdFusion server during publishing, the publishing server parameters can be set up to limit the amount of time publishing will take place before giving the site a “rest.” This is especially significant on large sites with heavy traffic which regularly do large publishing jobs.
- Users can request that one or more pages of content be published without having to wait for the results - if the user moves on to another task after requesting a publishing job, the job will continue to conclusion.
- The results may be monitored with a progress bar, and the user will be alerted when the publishing process is complete.
- Multiple instances of the publishing server may be run on one or more servers allowing for publishing to multiple servers or sites in one step.
- Publishing of specified pages can also be scheduled to happen in the future or at a periodic interval.

What is a Publishing Service?

A publishing service is a Windows .NET service and can support multiple instances of publishing servers and multiple publishing servers can talk to a single instance of Content

Manager. The publishing service must be on the same physical machine as any publishing server(s) which use it. The service must be able to see both the database physical machine and the web/application server physical machine.

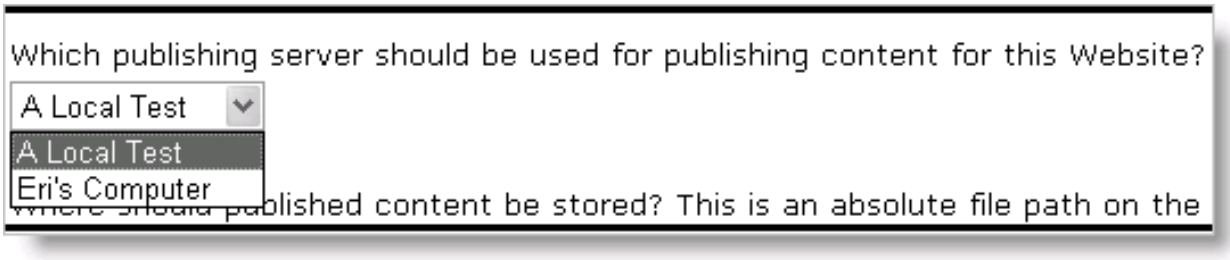
Typical Publishing Configuration

Since there are a number of parts involved in e-CM publishing, it is useful to take a look at a typical configuration. If your site has already been configured and you just want to know more about the parameters you can use to control publishing, see Understanding Publishing Server Configuration.

- Servers: Application, web and Database - Each instance of e-CM runs on a physical machine which would typically include the ColdFusion application server and the Windows IIS (Internet Information Service) webserver. A typical configuration would include a separate physical server for a SQL Server database, although some smaller websites combine web, application, and database software on the same physical machine.
- e-CM Publishing Server - The publishing server can be on any machine that can "see" the machine with the ColdFusion application server installed. It will often be on the same physical machine at the application and webserver, but it can run anywhere on your network. The publishing server must have a publishing service installed on its physical machine in order to function.

Selecting a Publishing Server for a Website

Administrators can use the drop-down list shown in to select a publishing server for a specific website on the website properties page. You can run multiple websites using a single publishing server.

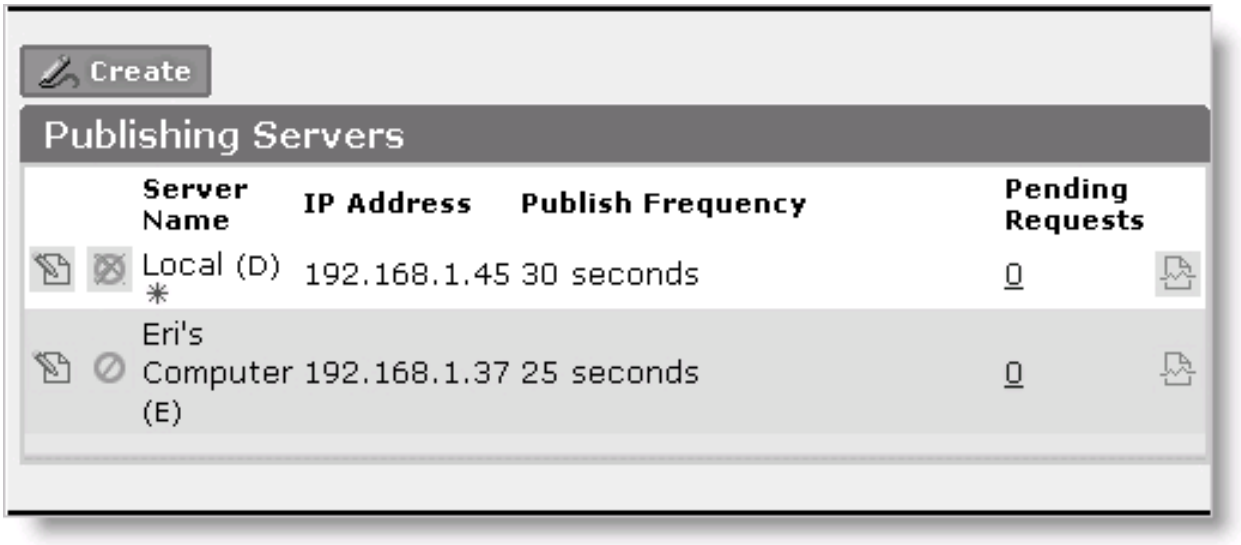


Selecting a Publishing Server

Viewing the List of Existing Servers

To view a list of existing publishing servers on your instance of content manager:

1. After logging into the administrative interface, click on the Sites button in the “Websites” section of the interface.
2. Click on the “Publishing Servers” link to see the list of existing servers.

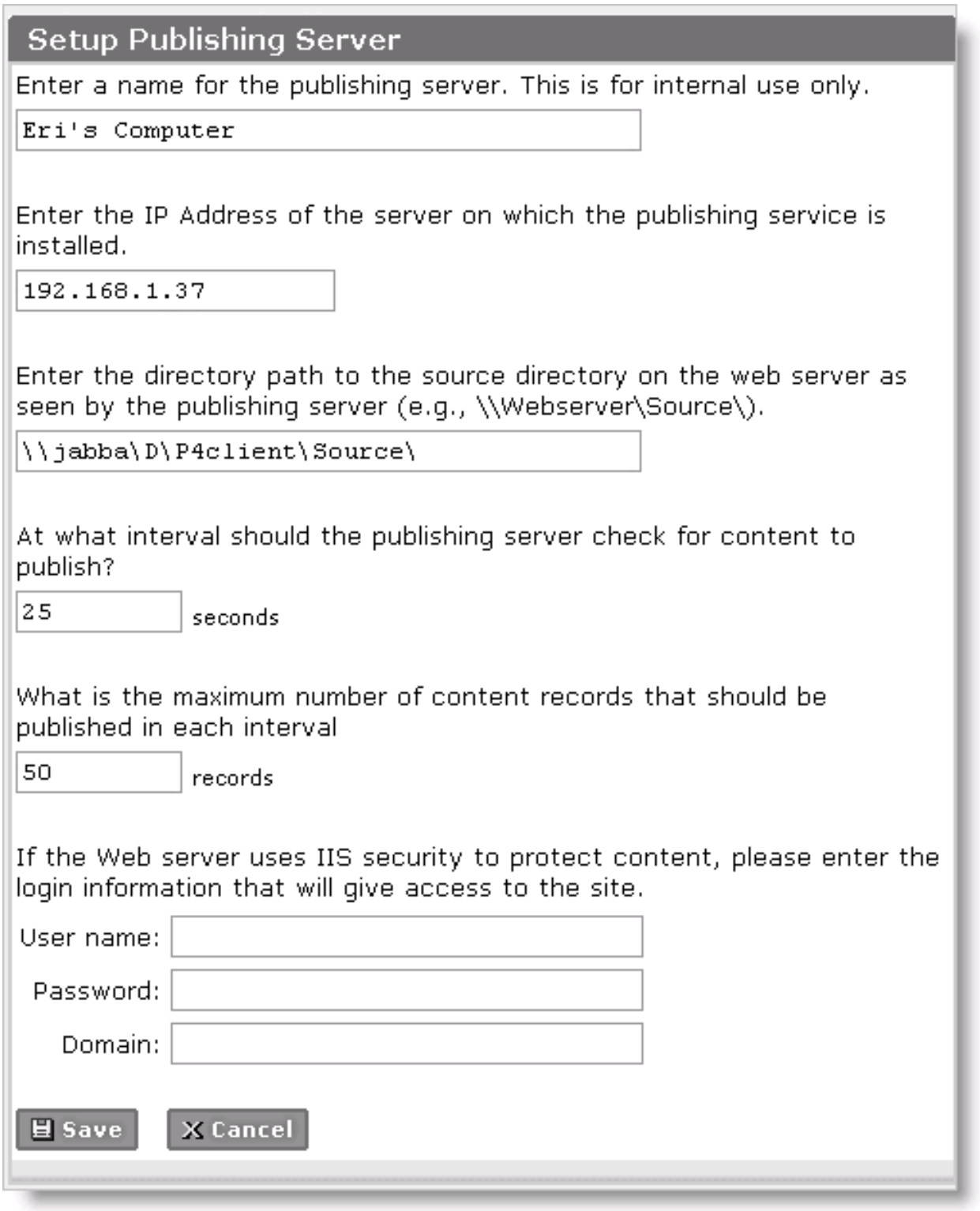


List of Publishing Servers

When e-CM is first set up it will include one server called “Default Publishing.” You may set up additional servers later but the default server may not be deleted.

Understanding Publishing Server Configuration

Unless you are a developer setting up sites, you do not need to know all the details of publishing server configuration. However, there are a few settings that you should understand.



Publishing Server Configuration Form

Publishing Server Name

This is a name for internal use, although content producers will see it in the publishing progress pop-up window while they are publishing, so make sure it is something sensible.

IP Address

This should be the IP address of the physical machine where the Windows service is running. Usually, this will be the IP address of the webserver. In theory, you can run this service anywhere (even on a desktop machine with a fixed IP address), but there is no particular advantage to doing so. By far the largest portion of resources consumed by the publish process will be consumed by the ColdFusion server, not the publishing service, so by installing the service on a separate machine, you are simply creating an unnecessary dependency.

Directory Path

This should be the full directory path to the Source directory as seen from the point of view of the machine on which the Windows service is running. Source, located above the web root for security reasons, is where uploaded files are placed when they are first attached to a content record. The publishing server must know where these files are located so it can copy them over to the proper directory when it publishes the content records. If the publishing server is located on the same physical machine as the webserver (which will usually be the case), this value will typically start with a drive letter.

Publishing Interval

The publishing server knows when it has work to do by polling the database for new requests. This value determines how many seconds elapse between each check. A typical value for this setting would be somewhere between 20 and 60 seconds. Since this is also the refresh rate on the publishing progress pop-up window, setting it much longer than 60 seconds may start to annoy impatient content producers. In some cases, however, more important considerations my override this concern. For example, if you have a large and heavily trafficked main site which publishes often and a collection of lower-priority simple sites, you might want to set the lower-priority sites up with separate publishing server(s) with the interval set to several minutes (remember that the interval must be specified in seconds).

Maximum Records per Interval

This setting determines how many content records will be published each time the publishing server polls the database for new requests. If publishing typically consists of small and infrequent jobs, this is not a particularly critical setting. However, if the site is very large and content is frequently added and updated, it becomes an important way to spread the load across several request intervals, ensuring that users will not see long slow downs as the application server creates the published files. The downside of setting a long interval and a relatively low number of content records is that publishing may occasionally back up.

You may have to adjust these two values (interval and maximum records) based on experience to find the best balance for your site(s).

User Name, Password and Domain

The user name, password and domain settings are used only when Windows IIS security is used to protect content. In this case, the publishing server must run under an account that has permission to create, update and delete content in the publishing directories.

To set up Publishing server on separate server

1. Perform the installation/configuration steps for eCM.
2. Go to the admin website > Publishing servers.
3. Edit the publishing server's information giving the IP address of the physical server that runs the publishing server application.
4. Enter the source file path, so that the path points to the c:\Program Files\ASI\iMIS15\iMIS_public\Source folder on the web server from the publishing server's point of view.

   Example:

   The web server is running on server1 and the publishing server is installed on server2, the source path should be: \\server1\c$\Program Files\ASI\iMIS15\iMIS_public\Source

5. Once the website is created, you must edit the path to web server from the publishing server's point of view. These paths are specified in the Website Properties page. Do this for every website. Add the paths at the following prompts.

- Where should published content be stored? This is an absolute file path on the Web server at or below the web root from the publishing server. Should be changed to \\server1\c$\Program Files\ASI\iMIS15\iMIS_public
- Where should secure published content be stored? This is an absolute file path on the Web server above the web root from the publishing server. Should be changed to \\server1\c$\Program Files\ASI\iMIS15\

6. Run the publishing service as a user who has access to the web server not as a user with a local system account. This assures that the publishing service has read/write access to the folders specified in the Website properties page.

- Go to Services manager.
- Click on Properties for AsiPublishing15.
- Go to the Log On tab.
- Enter account information not a local system account.

7. (Optional) If the servers are running as standalone, you may need to associate a user name and password for the web server with an account on the server with the publishing service. This assures that the account running the publishing service has automatic access to the folders specified in the Website properties page.

   For windows 2003:

- On the server that has publishing server installed, go to Control Panels -> Stored User Names and Passwords.
- Store the username and password for the server that is running eCM site.

  For windows XP:

- Find the instructions on the Microsoft support center. http://support.microsoft.com/kb/306541

  Note: There are other ways to set up the security so that the publishing service can write to files to the web server, such as using a share folder. Check with your network administrator as each organization has different network setup and policies.

e-CM Websites

Support for Multiple Websites

In e-CM, you can purchase the right to run a specified number of simple and advanced websites. While these websites share some properties in common (for example, a common pool of administrative users and authority groups), you can specify many properties, including the look-and-feel template, on a per-website basis.

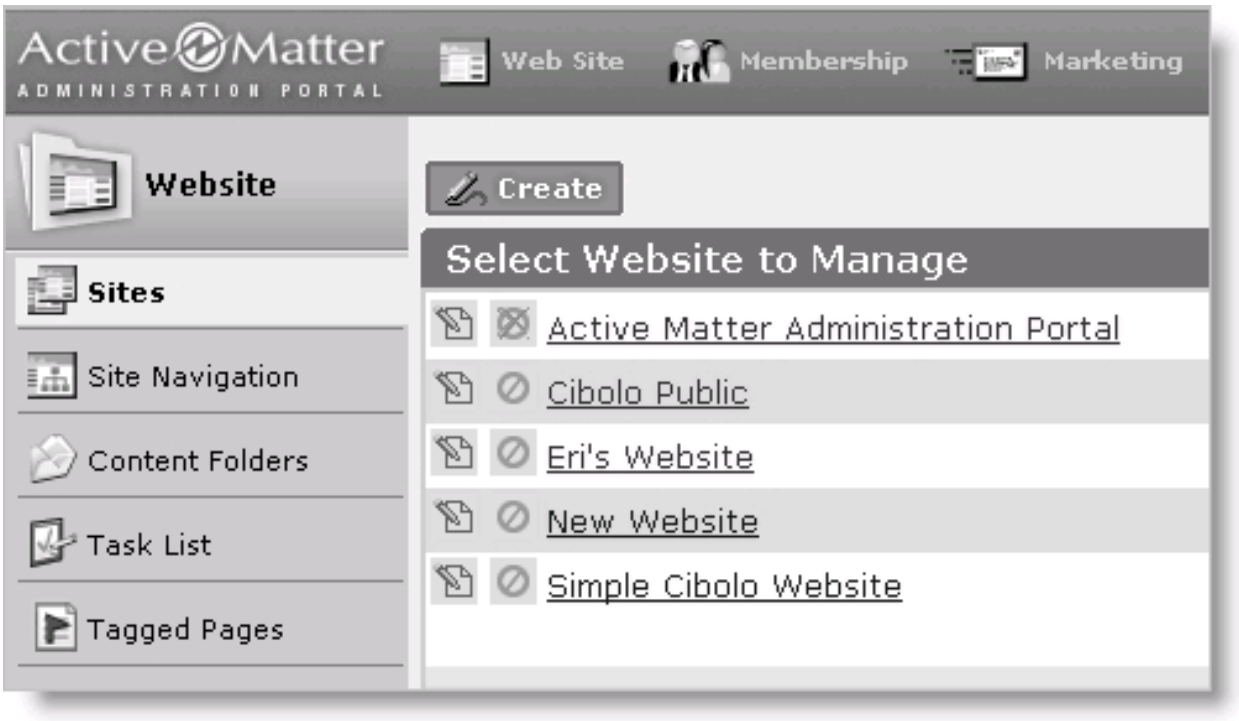
How to Select an Individual Website to Manage

Every user will have a default website set up in their user preferences. This is the website whose navigation you see when you click the Site Navigation button.

If you wish to view the navigation for a website other than your default website, there are two ways to do it.

Accessing a Website via the Sites Link

If a user clicks on the Sites link under the Websites link, they will see a list of websites to manage.



Selecting a Website to Manage in CM5

The user can:

- Click on the edit ( ) button to the left of the name to edit the properties of the website.
- Click on the delete ( ) button to the left of the name to delete the website.
- Click on the website's name to go to the navigation for that site.
- Click on the preview ( ) button on the far right to preview the website as a front-end user would see it.

In order to access the Select a Website to Manage form the user must have the Add/Update Website permission checked in the Security Assignment section, which is located under the Admin button.

Add/Update Website Permission

Note: Every instance of e-CM will include the “Active Matter Administration Portal” website. This is not a website for users. It is the administrative interface itself, which is built in Content Manager. For obvious reasons, you want to be very careful about altering this website, and the delete button has been disabled.

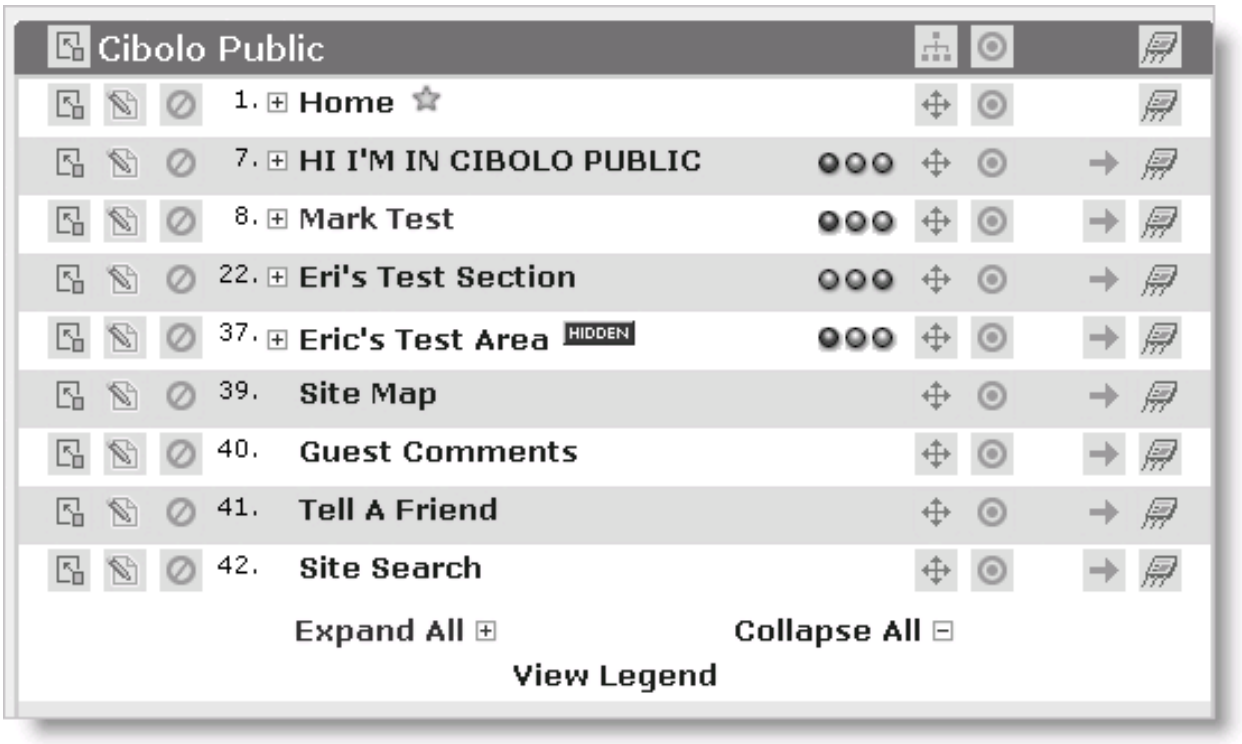
Using the Sites Link at the Top of Any Navigation Menu

If a user does not have permission to access the Select a Website to Manage form, they can still navigate between any websites containing content they have access to (owned by an authority group of which they are a member) by using the sites button located at the top of the navigation item display. This pops up the manage/create site form in a new window, showing only those sites which the user has access to.

The user may then:

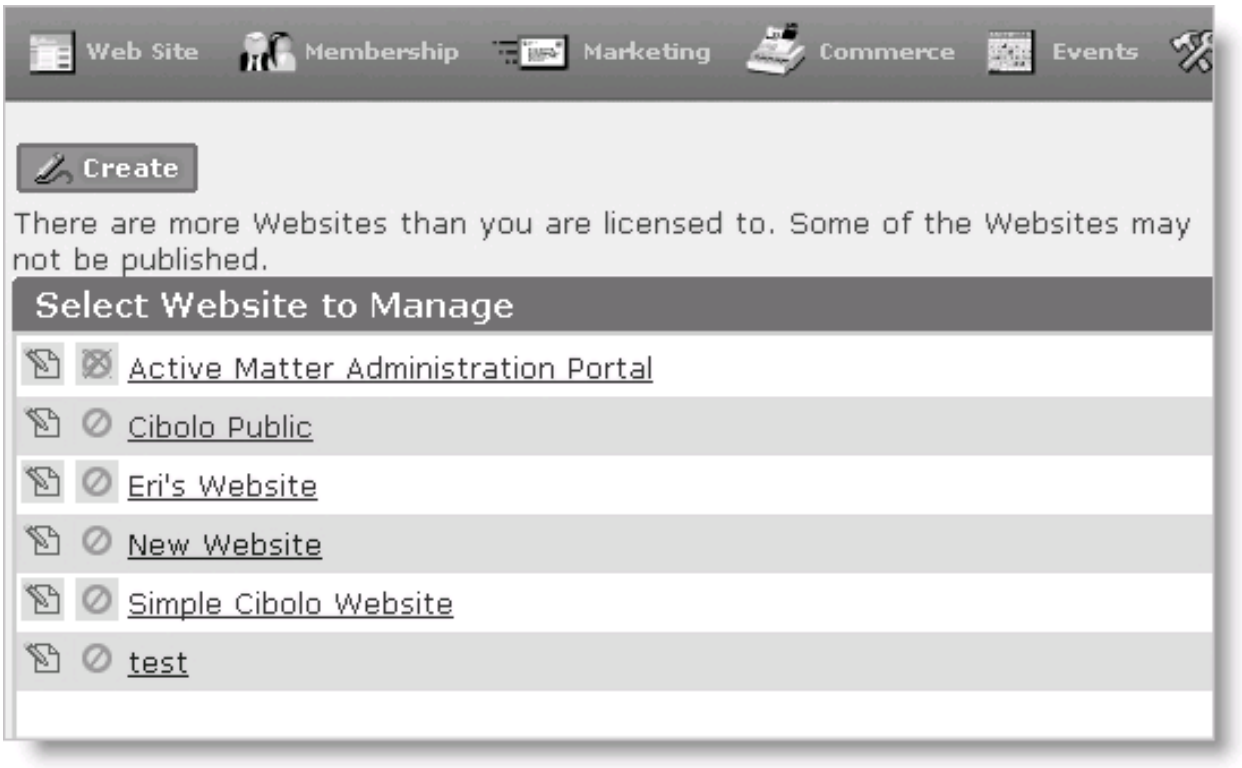
- Click on the edit ( ) button to the left of the name to edit the properties of the website.
- Click on the delete ( ) button to the left of the name to delete the website.
- Click on the website's name to go to the navigation for that site.

- Click on the preview ( ) button on the far right to preview the website as a front-end user would see it.



Website License Enforcement

If the number of websites, either simple or advanced, exceeds the licensed amount, the user will be alerted when creating a new website or changing a website from simple to advanced or vice versa. The website can still be created, but will not be published.



License Warning on Top of Website Management List

Website Creation/Properties Form

When the administrator is creating a website, the properties form is presented as a two-step “wizard.” After the site is created, the same elements are found in the one-part web-site properties form.

Who Can Access the Website Creation/Properties Form

In order to access the Website Creation Form, a user must have Add/Update Website permission checked in the Security Assignment section. This gives access to the Sites link, which in turn contains the Create button, which allows a user to access the form.

To access the Website Creation Form

To access the website creation form:

1. Click on the web Site link on the top admin navigation bar.

2. Click on the Sites link to display a list of existing websites.
3. Click the Create button at the top of the list of websites:

Website Creation Button, Above Website Management List

To access the Website Properties form

To access the properties form for an individual website:

1. Click on the web Site link on the top admin button bar.
2. Click on the Sites link to display a list of existing websites.
3. Click on the small edit ( ) button to the left of the site's name.

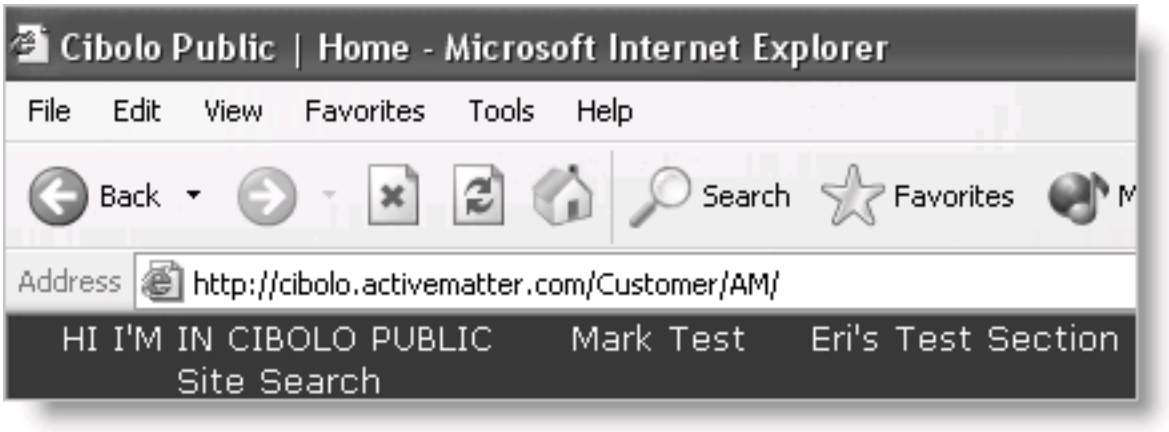
Form Inputs Step 1

If you are working through the set-up wizard, the following settings will appear in page one of the wizard (if you are looking at the properties page of an existing site, all settings will be displayed in a single page).

Internal Website Name

The first input on the form is the internal name for the website. This name will appear in the administrative interface, and will also be part of the title in the front end of the website (and will thus appear in the browser title bar)

Internal Website Name



Website Name as Part of Title

Website URL

The next input is the URL of the website. This must also be registered in IIS if host headers are being used and with a DNS service, but entering it here effectively tells CM5 which URL to point to. Note that all websites in a particular instance of CM5 must be located under a single directory structure, since there is only one ColdFusion application. However, each can have a different URL, including a subdomain, domain, directory or virtual directory.

Website URL

Secure URL

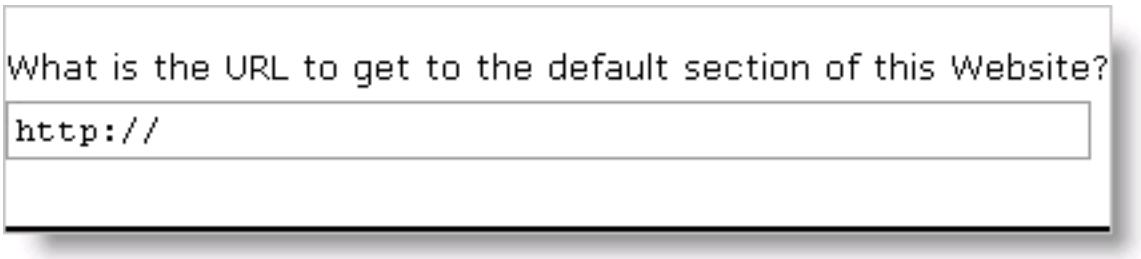
Enter the secure URL of the website, if used.

Secure URL

Default Section URL

This can be used to create a shortcut to the website URL (optional). For example, if a site's actual URL is http://cibolo.activematter.com/Template.cfm?Section=Magazine, this field could be used to create an alias such as http://cibolo.activematter.com/magazine/ which will re-direct users to the actual URL.

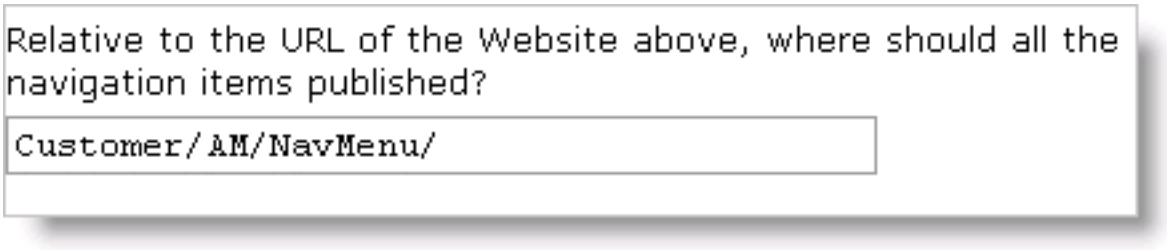
This functionality takes advantage of IIS's ability to map a custom 404 error handler. In the example above, the directory “magazine” does not actually exist, but the custom error handler sees “magazine/” and knows to go to the actual URL.



Default Section URL

Navigation Item Publish Location

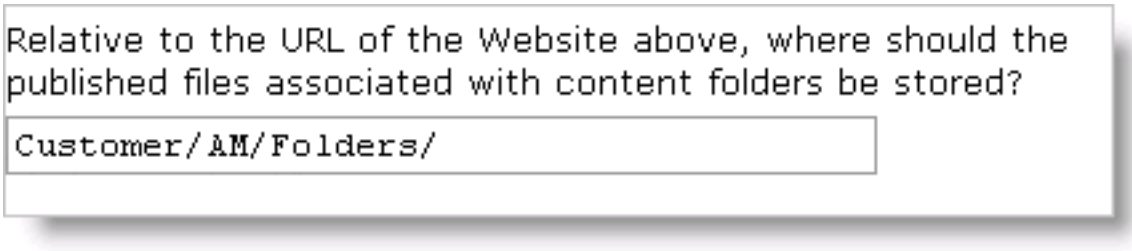
The relative path, from the website URL, where published content associated with navigation items will be stored.



Navigation Item Publish Location

Content Folder Publish Location

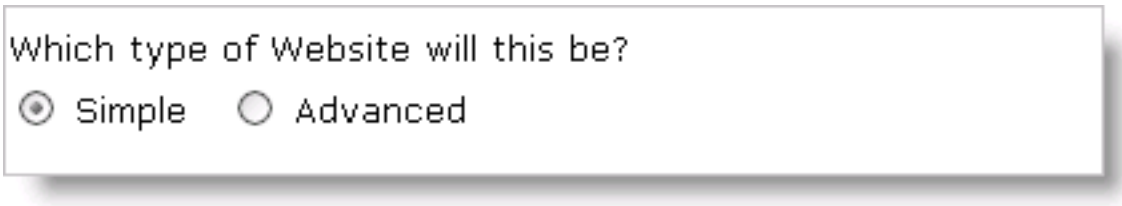
The relative path, from the website URL, where published content associated with content folders will be stored.



Content Folder Publish Location

Website Type

The two radio buttons shown below determine whether the newly created site will be a simple or advanced website.



Website Type

Tagging Y/N?

The two radio buttons determine whether or not the newly created site will use tagging.

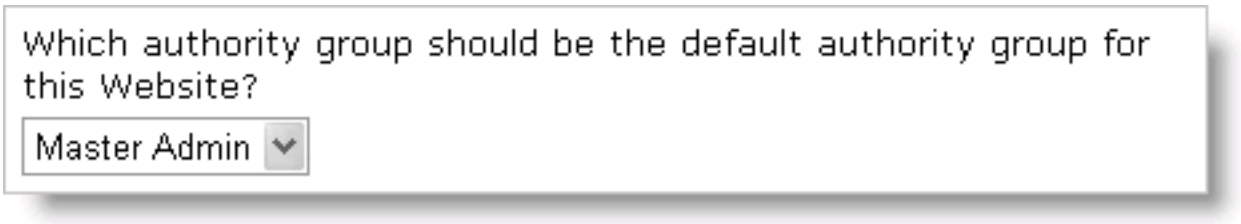
Tagging Properties Setting

Selecting No does the following:

- Disables the tag button in toolbars.
- Turns off the Switch to Tagged Page option for content records.
- Stops the tag warning for content in content folders.

Default Authority Group

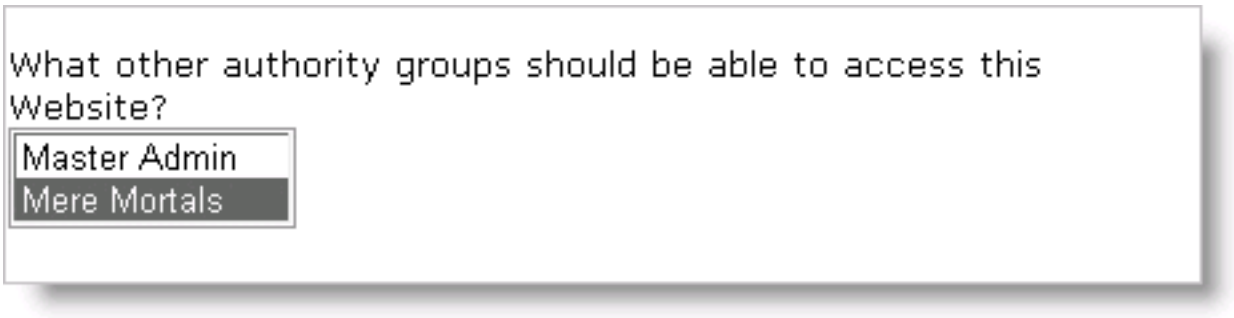
This determines the authority group to which all navigation items and content folders will default to if no other group is chosen.



Default Authority Group

Additional Authority Groups (Advanced Websites Only)

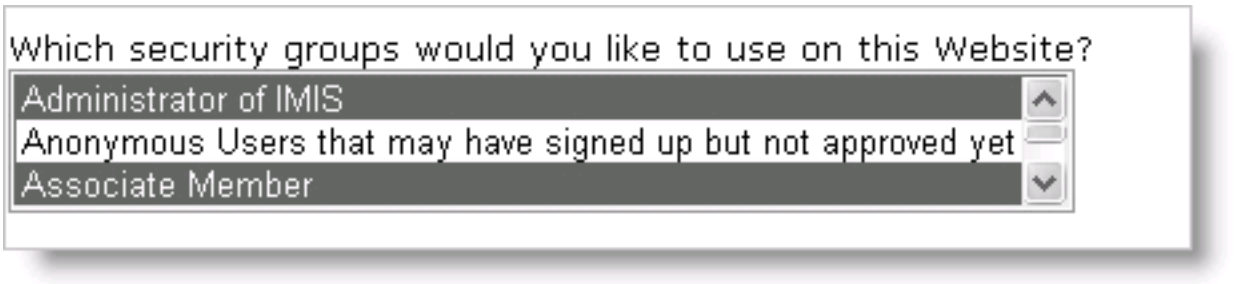
Simple websites use only one authority group. On an advanced website, you have the option of enabling additional authority groups. As soon as a group is enabled, it will appear on the drop-down lists in the workflow section of the navigation item properties page.



Additional Authority Groups

Security Groups

This multi-select box determines which groups will be available for security group protection on the website. In earlier versions of e-CM, these groups generally corresponded to member types. In e-CM 5, they can be defined via queries and thus do not have to be directly linked to your member types.



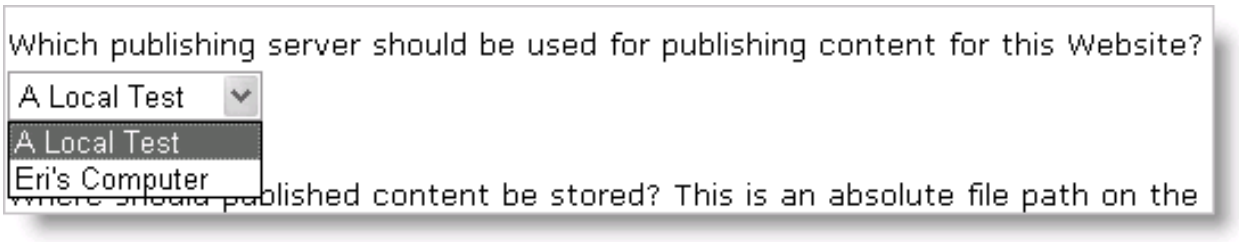
Security Groups

Form Inputs Step 2

If you are working through the set-up wizard, the following settings will appear in page two of the wizard (if you are looking at the properties page of an existing site, all settings will be displayed in a single page).

Selecting a Publishing Server

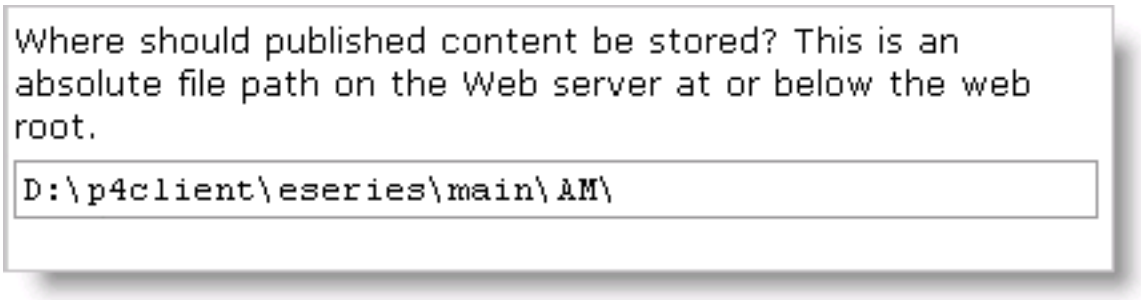
Administrators can use the drop-down list to select a publishing server.



Selecting a Publishing Server

Published Content Location

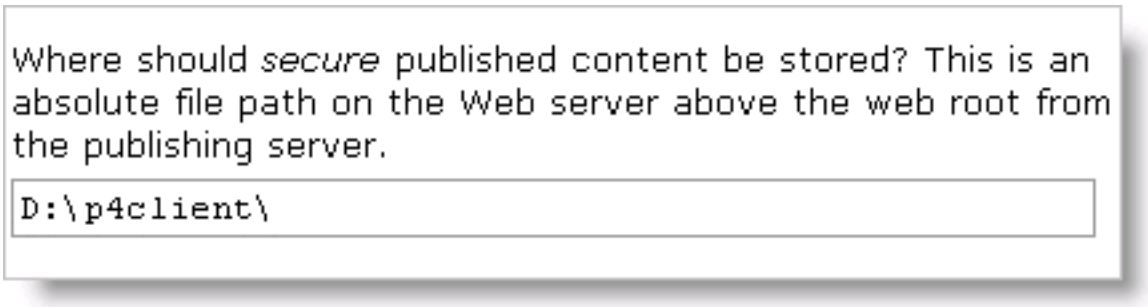
An absolute file path to the storage location for published non-secure content.



Published Content Location

Secure Published Content Location

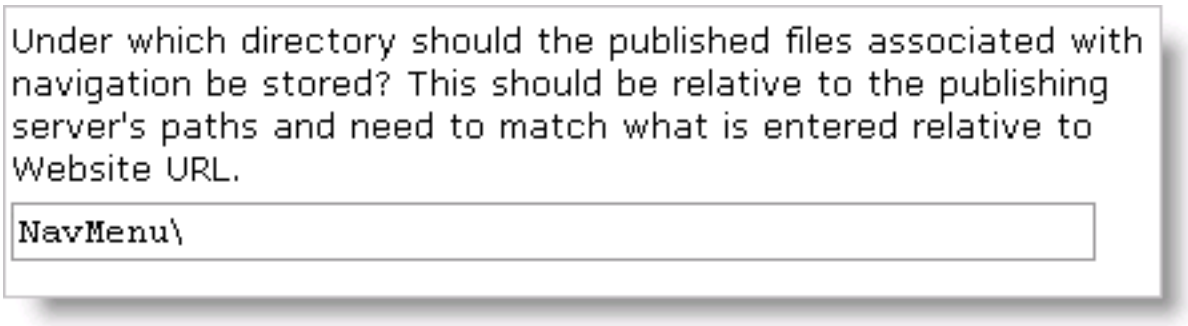
An absolute file path to the storage location for published secure content.



Secure Published Content Location

Navigation Menu Publication Directory

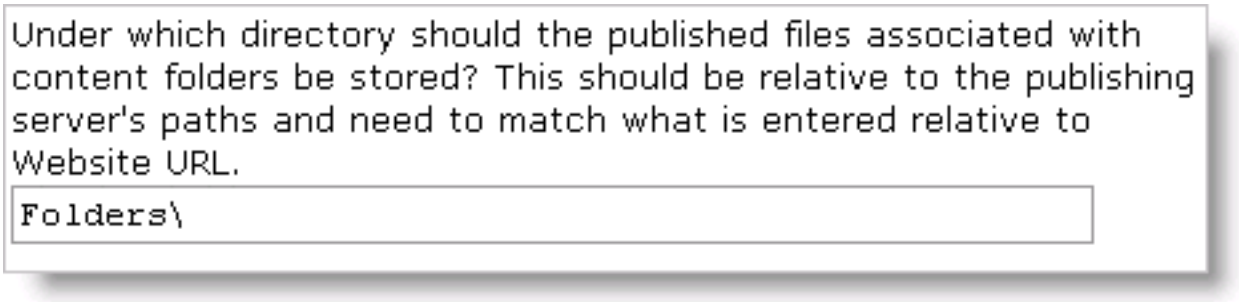
In which folder should published files associated with navigation items be stored?



Navigation Menu Directory

Content Folders Publication Directory

In which folder should published files associated with content folders be stored?



Content Folders Publication Directory

Default Page

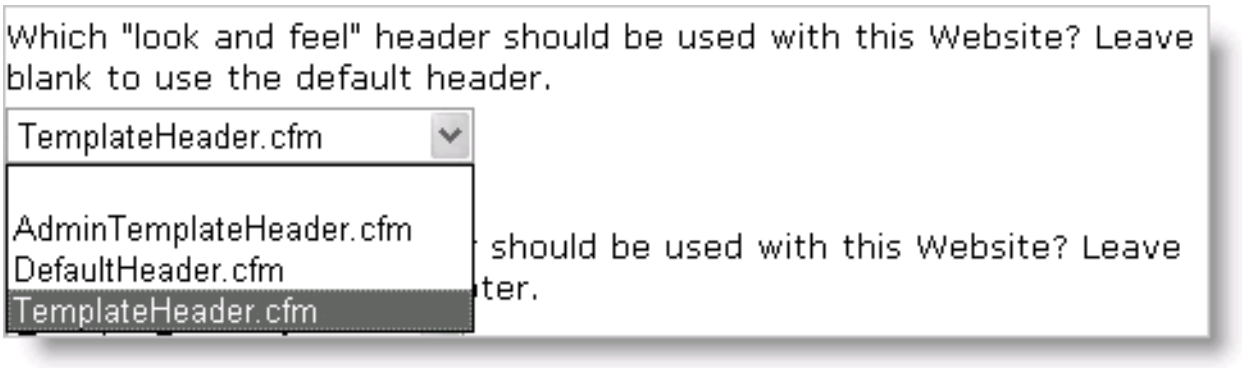
If there is a value entered here (e.g. “Default.htm”) each navigation item will create a default file of that name in the directory used to publish content, allowing the user to access the content with a URL such as http://cibolo.activematter.com/UpcomingEvents/

The file name entered must be set up as a default document in IIS.

Graphics Directory

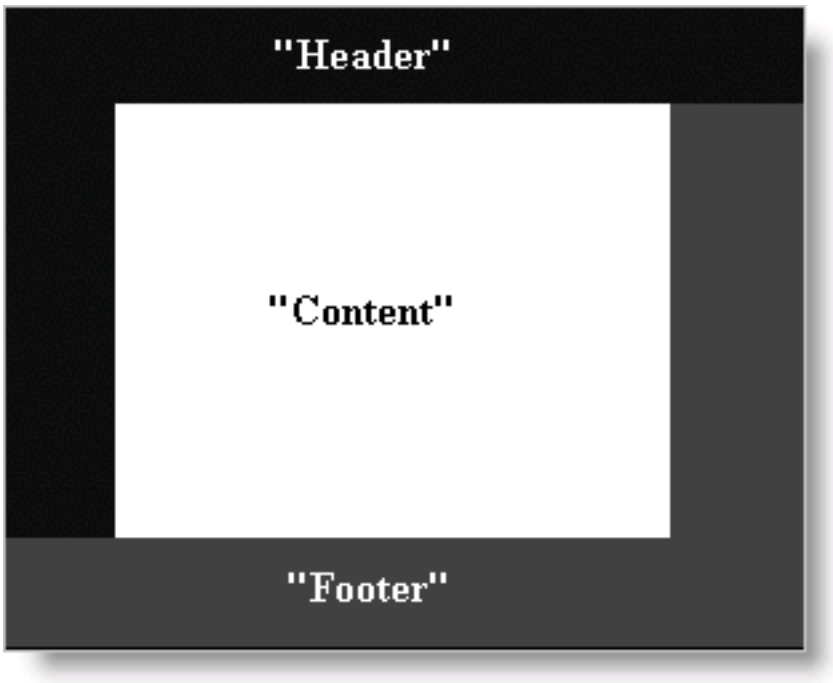
This dictates the storage location of the directory used to hold button graphics, allowing each website to have its own set of buttons (if needed).

Look and Feel Header Select



Look and Feel Header Drop-Down

The look and feel header drop-down lists the choices for website look found in the Templates/TemplateHeader directory. The header includes graphics, content and navigation found above and to the left of the main content area.



Schematic Structure of CM5 Page

Look and Feel Footer Select

The look and feel footer drop-down lists the choices for website look found in the Templates/TemplateHeader directory. The header includes graphics, content and navigation found below and to the right of the main content area.

Stylesheet Select

The list of options is read from the Styles directory. A different style sheet, specifying fonts, colors, etc. can be selected for each website. Changing style sheets does not require a website re-publish.

Header for Printer Template

This list is generated from Templates/PrinterHeader. An application-wide option controls whether to show this option, which presents a navigation-free “printer friendly” template.

Footer for Printer Template

This list is generated from Templates/PrinterFooter, and forms the bottom of the page in printer-friendly view.

Text-Only Header

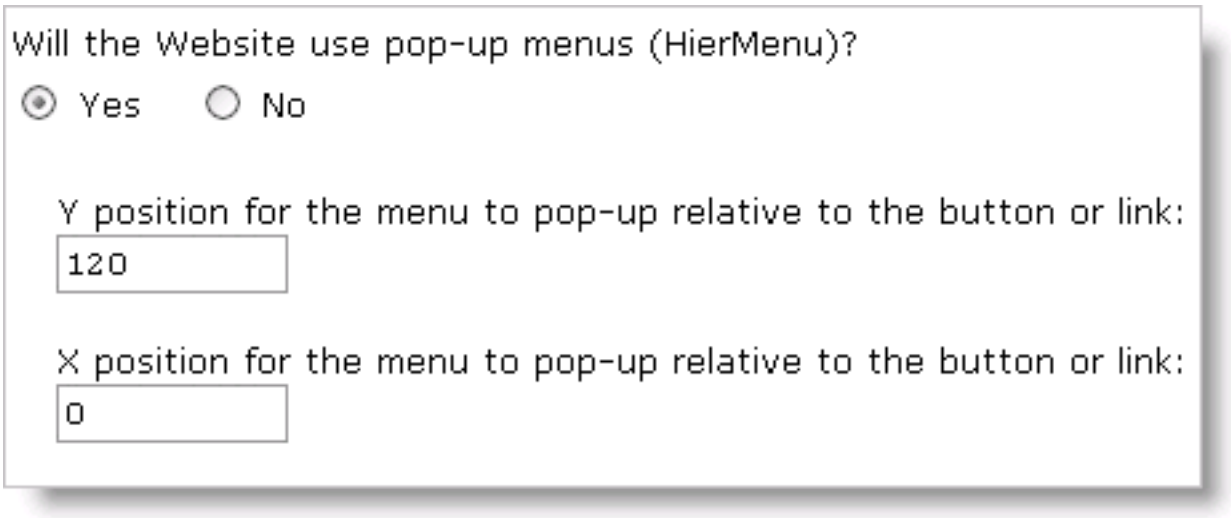
This list is generated from Templates/TextTemplateHeader. Intended for no-graphics presentation for users with low-bandwidth connections.

Text-Only Footer

This list is generated from Templates/TextTemplateHeader. Intended for no-graphics presentation for users with low-bandwidth connections.

Pop-up Menus Y/N?

If this setting is checked, it creates pop-up menus of every primary (ShowInTopFlag) item listing its immediate children. It will work only if the site uses a graphical template, not in the bare “wireframe” text-only default template.

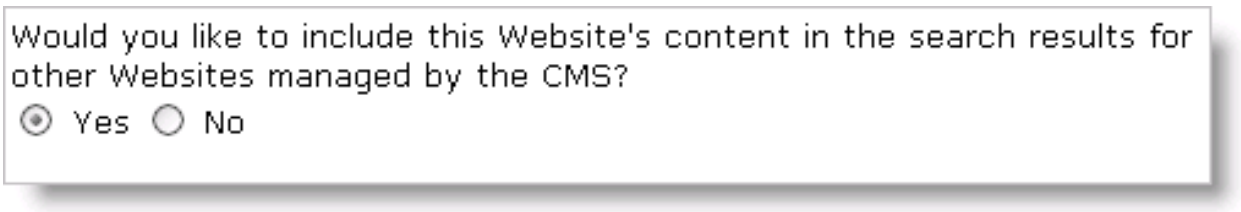


Pop-up Menu Settings

Breadcrumbs Y/N?

Turns the bread crumb trail navigation feature on or off. After changing this setting, the entire website must be re-published.

Include this Site's Content in Cross-Site Search?

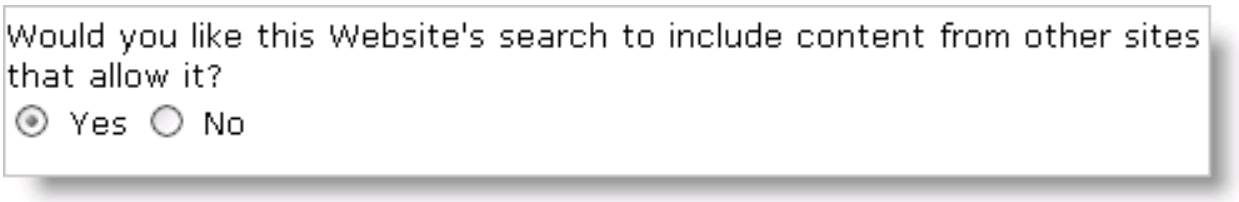


Include Content in Search Settings

If Yes is selected, content from this site will be available to be indexed for search on other sites, if those sites have the Include content from other sites option set to Yes.

If No is selected, content from this site will not be available for indexing by other sites in this instance of CM5.

Include Content from Other Sites in this Site's Search?

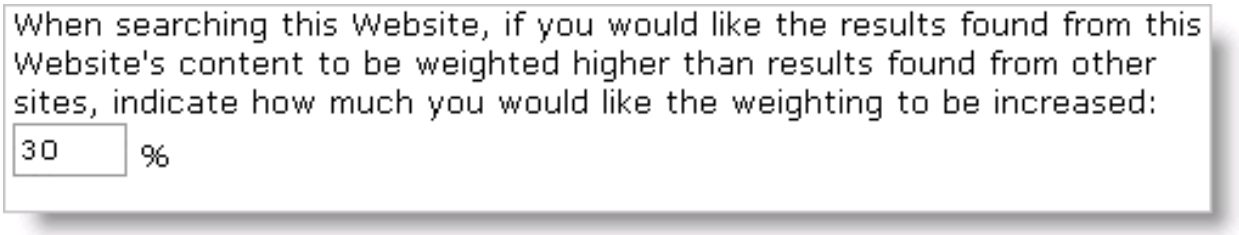


Enable/Disable Cross-Site Search

If Yes is selected, content from other sites which allow their content to be indexed for cross-site search will be included in this website's search index.

If No is selected only content from this site will be indexed in this site's search.

Search Weighting



Cross-Site Search Weighting Setting

If cross-site searching is enabled, this input can be used to give search results from this website a higher weight in search results than those of content from other sites.

If cross-site search is not enabled, this setting is moot.

Content Records Header

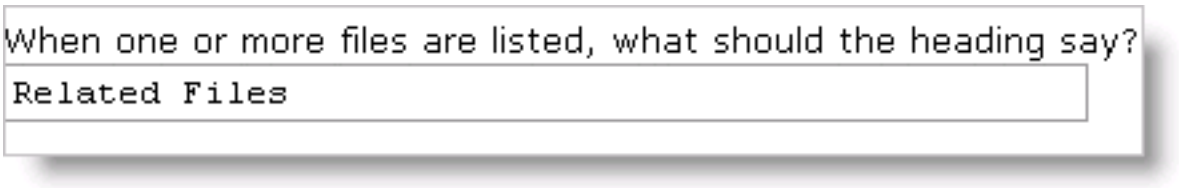
Content Records Header Setting

This setting determines the text of the default header which is displayed when a navigation item has more than one content record and the navigation item setting “view the

default content record in its entirety, followed by a list of links to the other content records" has been selected.

Uploaded Files Header

When uploaded files are added to a content record, they appear underneath a headline. This setting determines the text of the headline.



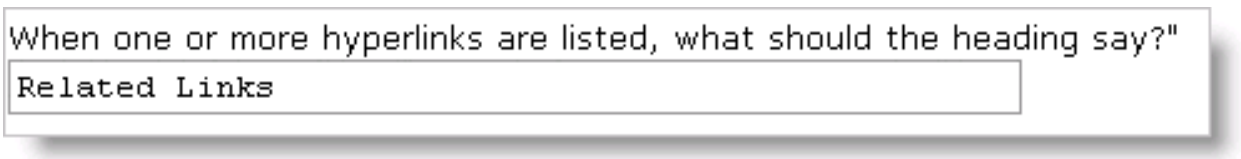
Uploaded Files Header Settings

This shows both the file and links headers in a content record:

File and Link Headers

Links Header

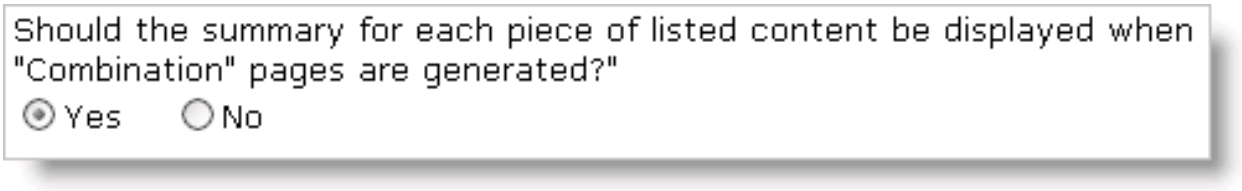
When links are added to a content record, they appear underneath a headline. This setting determines the text of the headline.



Links Header Settings

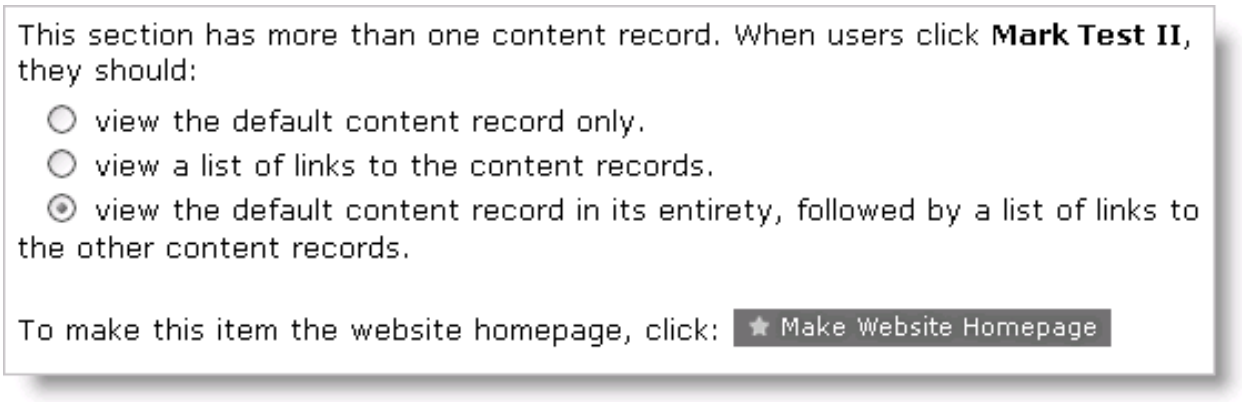
Combo Display Summary Y/N?

This setting determines whether or not content record descriptions are shown on a combination page.



Combo Display Summary Display

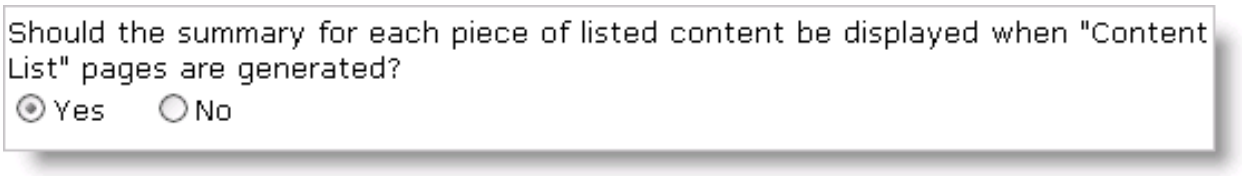
A Combination or “Combo” page can be generated when a navigation item contains more than one content record. When the combo option is selected the default content record (the first record in the list of content records at the bottom of the navigation item properties page) is shown in its entirety, followed by a list of links to other content records in the navigation item. If this setting is Yes, each content record's summary will be shown beneath its link.



Combo View Selected in a Navigation Item

Content List Summary Y/N?

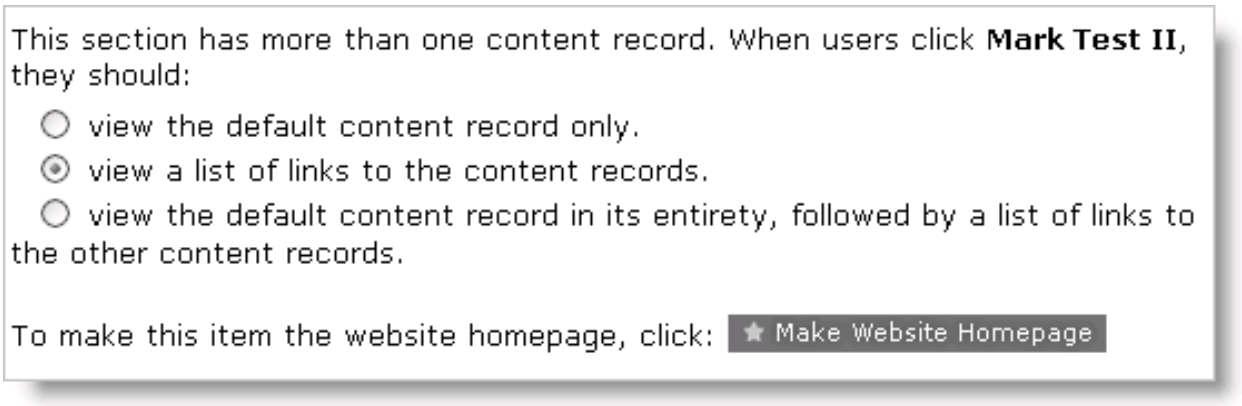
This setting determines whether or not content record descriptions are shown on a content list page.



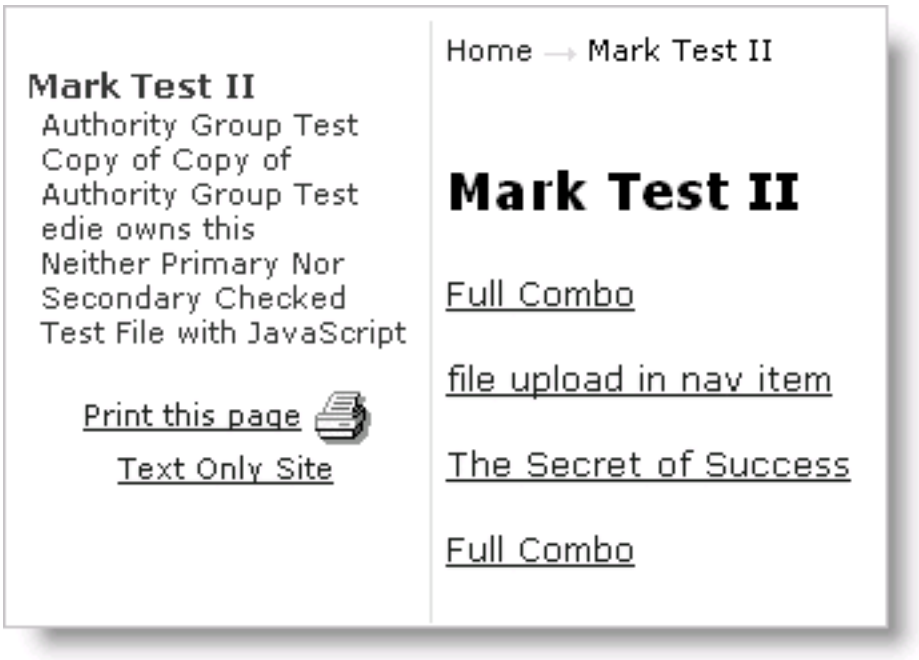
Content List Summary Setting

A content list page can be generated when a navigation item contains more than one content record. When the content list option is selected, the page shows only a list of links to content records in the navigation item.

This shows a combo page set not to display summaries:



List View Selected in a Navigation Item

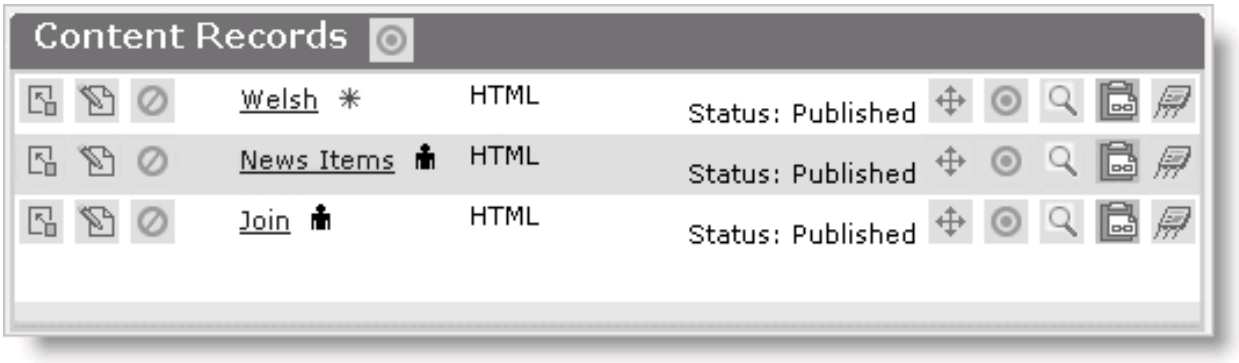


List View, No Summaries Displayed

Content List Sort

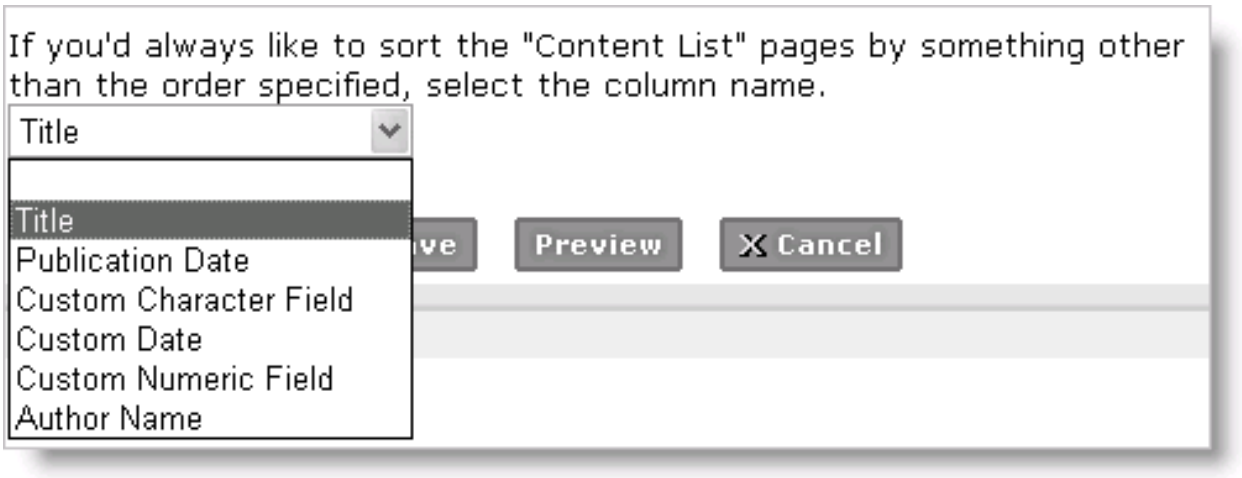
If you have more than one content record in a navigation item, you have the option of displaying either the default record only, a list of all content records, or the default record in full with links to other content records below.

Ordinarily, these lists of records will be sorted by the order shown in the navigation item properties page.



Multiple Content Records in a Navigation Item

If you would like to over-ride that default sort order in all cases, you can specify another sort criteria using the drop-down list. The available choices include Title, Publication Date and any user-defined fields. Sort will be ASCII order (0-9, A-Z, a-z).



Simple versus Advanced Websites

Every e-CM license includes a specified number of advanced and simple websites. Advanced websites in are full-featured websites with all the features described in this document. Simple websites have a slimmed down feature set designed, for example, to be used by an organization's chapters.

Overview of Simple Website Functionality

The following restrictions are imposed on simple websites:

No Workflow

Simple websites have no workflow-related features. Content being edited can be saved or published only. There is no submit for approval or approve step available. Only one Content Authority Group is available.

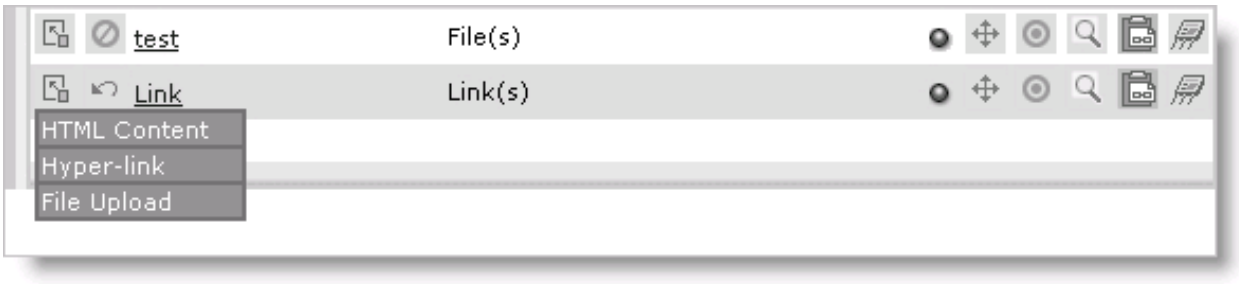
Other Restrictions

- Users are restricted to the simple toolbar, which has the effect of eliminating a number of capabilities, including the ability to view the properties page.
- There are no tagged pages (but tags can still be used to support site search).

- There is no versioning of content. The simple toolbar does not show the button. The system will still make versions, but the user will have no access to the functionality.
- Content can only be a single HTML document, or a single link, or a single uploaded document.
- There is no access to the content record properties page, meaning:
- There is no way to enter description and keyword meta tags
- There is no publish in the future
- There is no automatic publication
- There is no way to mark content as secure (HTTPS). This would have to be done through a link.
- Content has to be marked for members only at the navigation item level.
- The editing of both links and files is handled via pop-up windows (these forms would normally appear on the content record properties page).
- Editing content always goes to the WYSIWYG editor
- Surf-to-edit is available.
- User can still select between all three options for navigation items (default only, list, or default plus list of others).

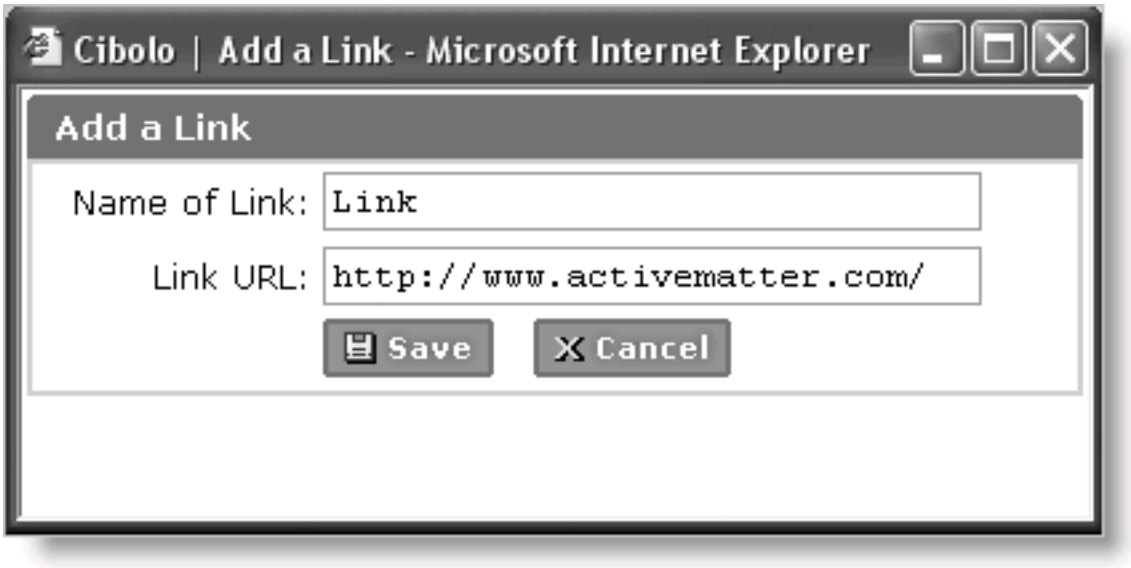
  Selecting a Type of Content to Enter

  When you insert a new content item in a simple website, you have to choose what type of content to insert in the record (since only one piece of content - HTML, link, or file may be inserted). This is accomplished via a pop-up menu which appears when the user clicks on the button.



Choosing Which Type of Content to Enter, Simple Website

After selecting a type of content, the user either goes to the HTML editor (for HTML Content) or to an appropriate pop-up form for a link or a file.



Pop-Up Editing Form for a Link, Simple Website

Site Maintenance

The activities and variables described apply to all websites on your e-CM instance.

This section addresses the variables that can be viewed and updated in the “Site Maintenance” section of the website, plus items that are found elsewhere but fall under the general heading of site maintenance.

Clearing Cached Pages

Clearing cached pages is an operation which requires the “tagging categories” security assignment permission.

In order to speed response time when users retrieve tagged pages, which require extremely complex database operations to build, those pages are cached (stored) in the server's memory the first time a user views them, and then remain unchanged in memory until they “time out (the timeout interval depends on the value of tagged page configuration variable TPCachedPageResetMinute). When a page times out, it is removed from memory and re-cached by the first user who requests it.

This produces much faster response times (since computer memory is much faster than computer hard disks), but it also means that updates which affect tagged pages will not go live immediately. If you want your updates to go live, you must clear cached pages. This removes the pages from memory and allows fresh copies to be re-cached when users next hit them.

Note: Your home page will probably also be cached.

To clear cached pages

1. Log in to the e-CM administrative interface.
2. Select Tagged Pages.
3. Select the Clear Cached Pages link. A message indicating that the cached pages were reset displays.

Resetting Server Variables

Server variables are all the stored application variables which make the website function. For all practical purposes, there is no reason to reset these values in the server's memory except during site development (although aside from slowing down site response while the variables are re-cached in memory, it will not break anything either).

To reset server variables

1. Log in to the e-CM administrative interface.

2. Select Admin on the top navigation bar.
3. Select Reset Server.
4. Select Reset Variables.

Creating Sites

Demo Tutorial Site

To get users up and running quickly, ASI has included a demo tutorial site that is installed when the e-CM Wizards are executed.

When the site is initially installed, it is created as a simple site without workflow, tool bar options, tagged pages, and versioning. To change the tutorial site to an advanced site, we need to change the configuration of our Demo Tutorial site.

Simple Tutorial Site Setup

Once the Tutorial Site is created by the e-CM Wizards, it still needs to be configured if a virtual directory is being used. Make the following changes to add the virtual path into the site.

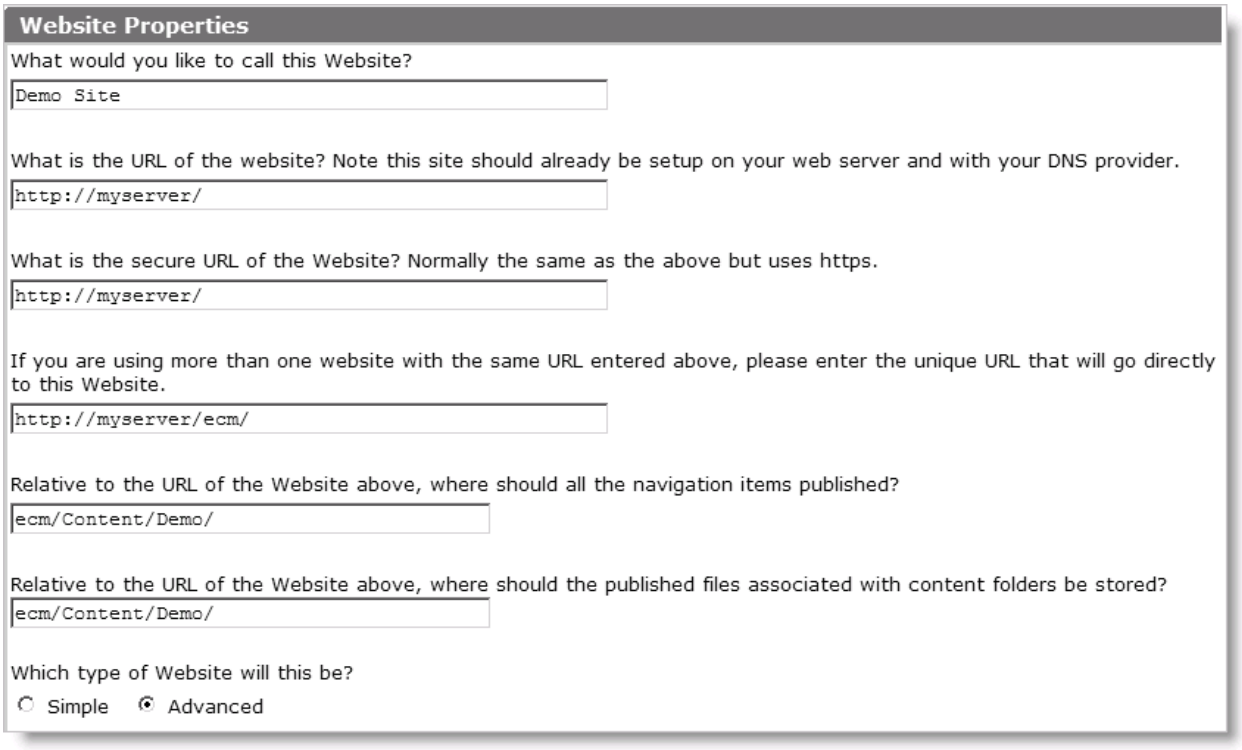
1. On line four of the properties page, add your virtual directory to the URL, replacing “Demo” with your virtual directory name (for example, http:/myserver/eContentManager instead of http://myserver/demo).
2. On line five, add the virtual directory to the beginning of the URL.
3. Save and republish the site. When previewing the Demo site, all links should be accurate.

Switch Demo Tutorial Site to Advanced Site

1. If you have not already done so, run the e-Series Application and e-CM Wizards as outlined above, making sure that the “Would you like to setup a tutorial site?“ option is selected.
2. Log in to the Administrative Portal and click the Edit button next to the Demo Site to go to the Website Properties screen.

3. Choose “Advanced” for the Type of Website. Notice more options become available for the implementer which are discussed in detail in the following “Create New Website section. For now, we will configure the Demo tutorial site to take advantage of the Advanced Features of e-CM.
4. Once the site is configured and saved, make sure to republish the website.

   Note: The iMIS license key must have ECMADVXX to use advanced e-CM features.



Website Properties page

Switching Simple Demo Tutorial Site to Advanced Site

What would you like to call this Website?	By Default, labeled Demo Site. Name of the website as well as what appears in browser title bar. Example: Demo Site

What is the URL of the website? Note this site should already be setup on your web-server and with your DNS provider.	Generally the domain name assigned to the IP address of the server or an actual IP address. Example: http://myserver.com
What is the secure URL of the Website? Normally the same as the above but uses https.	If a security certificate is available on the server, those pages designated requiring SSL will refer to this URL. If no SSL certificate is available, leave the same as the URL of the website. Example: https://myserver.com
If you are using more than one website with the same URL entered above, please enter the unique URL that will go directly to this Website.	If e-CM is installed under a virtual directory, the name of the virtual directory included in the URL Example: http://myserver.com/e-CM
Relative to the URL of the Website above, where should all the navigation items published?	Where the files are mapped to in IIS. For virtual directories: ecm/Content/Demo/
Relative to the URL of the Website above, where should the published files associated with content folders be stored?	Where the files are mapped to in IIS. If a Simple site, this option does not display. For virtual directories: ecm/Content/Demo/
Which type of Website will this be?	Will this be a simple or advanced for site. Choose Advanced
Will the site use tagging?	Will the Demo site use Tagging? For the Demo site choose yes
Which authority group should be the	Since this is a Demo site, there is only one

default authority group for this Website?	option - Master Admin. As we configure the Demo site, we can come back and edit to add more groups
What other authority groups should be able to access this Website?	Since this is a Demo site, there is only one option - Master Admin. As we configure the Demo site, we can come back and edit to add more groups. Note: This is an Advanced Website option only.
Which security access rights should be used with this Website?	Allows the user to choose eSeries Security Groups or iMIS Member Types to assign access to the site. Using the CTRL key, you can choose more than one group. For Demo Site, make sure Administrator is chosen.
Where should published content be stored? This is an absolute file path on the webserver at or below the web root from the publishing server.	Location on server where published content is stored. Example: c:\ecm\customer\
Where should secure published content be stored? This is an absolute file path on the webserver above the web root from the publishing server.	Location on server where secure published content is stored. Example: c:\ecm\customer\MembersOnly
Under which directory should the published files associated with navigation be stored? This should be relative to the publishing server's paths and need to match what is entered relative to Website URL.	Content\Demo\
Under which directory should the published files associated with content folders be stored? This should be relative to the publishing server's paths and need to	Content\Demo\

match what is entered relative to Website URL.	
What is the default page for this site? Make blank if not using defaults.	Default.htm
Under which directory are the graphics buttons for this Website stored? This should be relative to URL of the Website.	DemoGraphics/
Which "look and feel" header should be used with this Website? Leave blank to use the default header.	DemoTemplateHeader.cfm
Which "look and feel" footer should be used with this Website? Leave blank to use the default footer.	DemoTemplateFooter.cfm
Which stylesheet should be used for this Website?	DemoStyle.css
Which header should be used for printer template?	DefaultPrinterHeader.cfm
Which footer should be used for printer template?	DefaultPrinterFooter.cfm
Which header should be used for text only template?	DefaultTextHeader.cfm
Which footer should be used for text only template?	DefaultTextFooter.cfm
Will the Website use pop-up menus (HierMenu)?	Yes
Y position for the menu to pop-up relative to the button or link:	120. Note: Only visible if pop-up menus are active
X position for the menu to pop-up relative to the button or link:	0. Note: Only visible if pop-up menus are active

Will the site use bread crumbs?	No
Would you like to include this Website's content in the search results for other Web-sites managed by the CMS?	Yes
Would you like this Website's search to include content from other sites that allow it?	Yes
30	75%
When multiple content records are listed for a single navigational item, what should the heading say?	Related Documents
When one or more files are listed, what should the heading say?	Related Files
When one or more hyperlinks are listed, what should the heading say?"	Related Links
Should the summary for each piece of lis-ted content be displayed when "Com-bination" pages are generated?"	Yes
Should the summary for each piece of lis-ted content be displayed when "Content List" pages are generated?	Yes
If you'd always like to sort the "Content List" pages by something other than the order specified, select the column name.	Title

Virtual directory for Template Gallery and Demo Tutorial sites

If a Template Gallery or Demo Tutorial site is setup to use a virtual directory, the user must go back and edit these fields after the website is created. The Website properties page does not update the file locations for the following prompts when the website is cre-ated:

- Relative to the URL of the website above, where should all the navigation items published?
- Relative to the URL of the website above, where should the published files associated with content folders be stored?

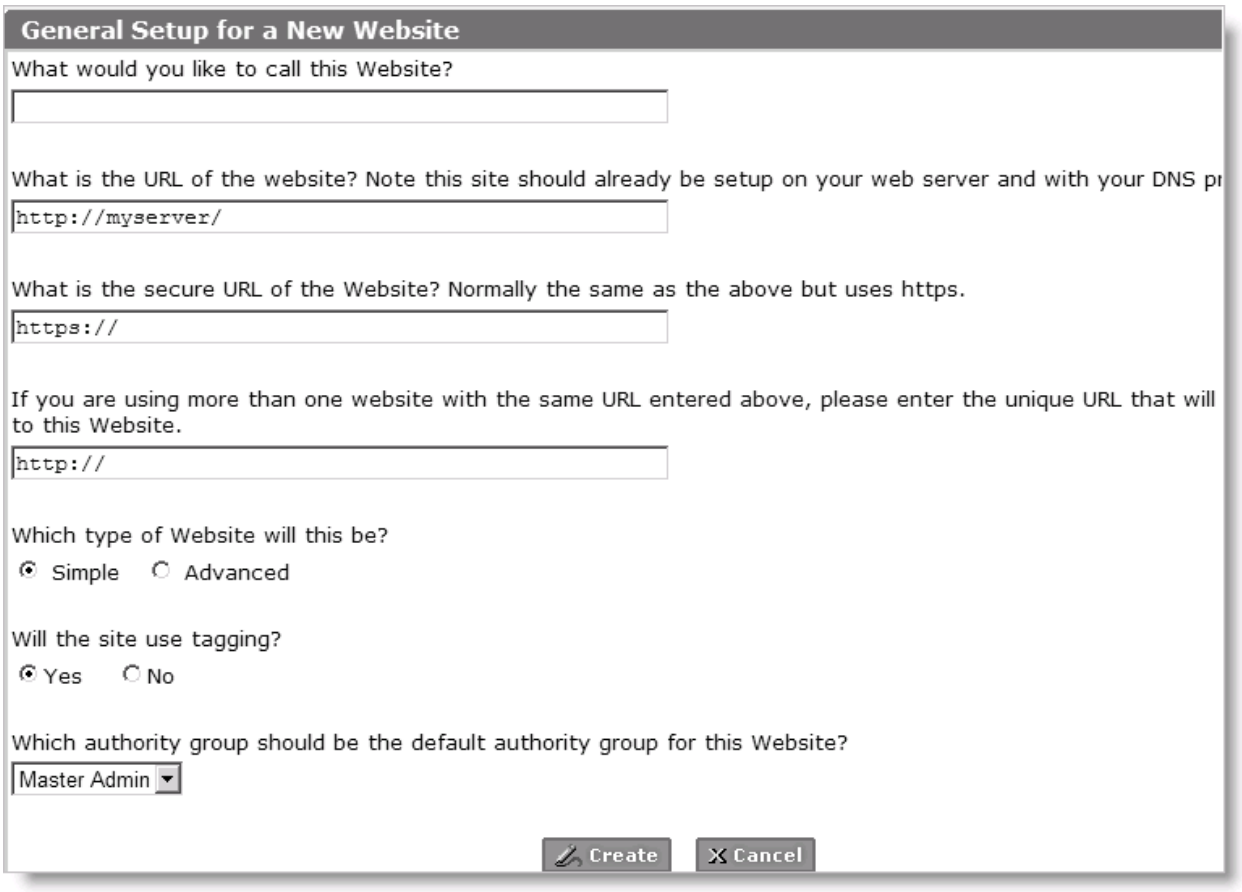
  The correct virtual directory must be entered on the Website properties page after the website is created, otherwise the site will not behave as expected.

Create New and Additional Sites

Creating a new site is a two-step process that is very similar to editing the tutorial site. If you are licensed for additional sites, you can create sites that can be customized based on your clients needs. For example, if you have an organization that has chapters, you can create a separate web page per chapter, giving each chapter its own template and customization to make each chapter's web page unique. In addition, you can assign separate content producers as well as assign security independently per website.

The first step is to create the site. The next step is to edit the properties for the site.

1. In the Admin Portal, go to Sites.
2. Click the Create button.
3. Populate the new site settings by populating the Website name, URL type of site, tagging, and which Authority Group to use for this site.
4. When all fields are populated, click Create. You will be taken back to the Manage web Site screen.



General Setup for a New Website

5. Once the site is created, click on the new sites properties screen to continue setting up the new site. Refer to the settings table for the demo website for field properties definition,

Content folders must be deleted before website in e-CM

In e-Content Manager, if you delete a website, all corresponding folders, content, and navigation items will also be deleted.

Configure e-Series

If you are using e-Series, now is the time to configure the system parameters and security for the e-Series modules.

To access the e-Series settings

1. Log in to the e-CM Portal

Example: http://yourserver/virtualdirectory/source/Security/Site-Logon.cfm?Section=Site_Maintenance

2. Choose eSeries on the left-hand index.
3. Click System Parameters.

Appearance and Content Migration

While e-CM provides the framework and functionality of the client's website, the customer will want to customize e-CM to fit their needs and brand image.

Web Design

Web design and graphic layout should not be confused with Information Architecture. web design communicates the client's branded recognition to its members or organization and sets the web visitor's first impression of the organization when visiting the website.

An implementer should work closely with clients to determine the right balance of branding, audience strategy, and visual impact to arrive at a website design that is rooted in a forward-looking strategy.

Web Design and graphic creation should be contracted out to professionals if the reseller does not have someone on staff that can fulfill these functions.

Some important considerations in website design:

- Form and function should be one - Otherwise, the medium will obscure the message rather than effectively project it
- Adhere to the following qualities - Simplicity, consistency, and convention
- Take advantage of the following web conventions:
- Persistent Navigation
- Local Navigation
- Breadcrumbs
- Text-only navigation (usually in the footer)

- Search box if a large site
- The home page - This is the most valuable piece of real estate in your site
- Use colors carefully - web monitors and offset printers treat colors differently
- Finally, design what works best for your users with regard to content, marketing, and branding

Template Overview and Editing

e-CM uses templates and style sheets to display site visual properties consistently throughout the site so that when a user clicks on one page, its appearance is similar to all other pages on the website.

Header and Footer

There are several good examples of headers and footers, such as the Demo Template Header and Footer, as well as the Default Header and Footer. These files are found in the Templates\TemplateHeader and Templates\TemplateFooter directories.

The starting point should be the unencrypted files TemplateHeader.cfm and TemplateFooter.cfm.

Note: If a demo site is set up, the demo template is a good starting point since you can review your edits as they are made.

In general, the header file should include everything that is rendered before the content and the footer file should include everything that is rendered after the content.

The easiest thing you can do is to add HTML (images, links) and edit the stylesheet (whichever stylesheet is selected in the website properties). In a stylesheet, there is a section toward the end dedicated for the template.

Also for top nav and side nav, there are certain settings that can be passed:

Top:

<cfset l_NavColumnsAcross = 6> (How many columns to show across)
<cfset l_NavShowAcross = True> (Should the nav show horizontally?)
<cfset l_NavTableWidth = "100%"> (Table width for the navigation)

<cfset l_AlwaysShowAsOff = False> (If images or text rollover is used, should the current item be highlighted or always shown as off.)
<cfset l_TextRollover = False> (Text rollover is what the demo template uses.)
<cfset l_ShowDivider = False> (When text rollover is used, divider can be displayed between each item)

Side:

<cfset l_ShowCategoryDepth = 1> (The depth of the navs to show on the side)
<cfset l_HighlightFirstItem = "True"> (Whether or not to highlight the first item as selected. i.e, whether or not to use "Selected" style class.)

Other ColdFusion code in the files should not be modified unless the user is an experienced ColdFusion developer. It is best to avoid hard-coding URLs as much as possible, since these normally change between the development environment and the production environment. Graphic paths should not be hard-coded either, since these also change between the test and production sites.

Advanced users who want to modify the way top navigations and side navigations are displayed can modify the Templates\TemplateTopNav.cfm and Templates\TemplateSideNav.cfm files. However, the user should not modify anything other than the HTML part of the code since these files also include logic for which nav items to show. Also, when modifying these two files, the user should be aware that any changes may be lost during upgrades.

Stylesheets

For all of your templates, you should put your stylesheets in the /AM/Styles folder. The template can only call one stylesheet (which you can define in the properties of the website). If you need to add additional stylesheets and/or include JavaScript code that has to be placed between the HEAD tags of the HTML, then you should use code similar to below to help. The following is an example you need to modify for your particular site.

<cfset request.l_HTMLHeadContentInformation = request.l_HTMLHeadContentInformation & '<LINK REL="StyleSheet" HREF-F="#application.GECodePath#Styles/ClientStyles.css" type="text/css">'>

Custom Home Pages

If the site design requires a custom home page with a different look and feel (for example, a top navigation but no side navigation), you should set a flag in the header and footer files you use. This flag can be used to display the HTML and layout only for the home page and to display everything else for the interior pages.

```
<cfset l_HomePageFlag = FALSE>
<cfif l_Section IS application.WebsiteRef.DefaultSectionName[l_WebsiteIndex]>
   <cfset l_HomePageFlag = TRUE>
</cfif>
```

For any custom dynamic content that needs to be displayed on the home page, you can create a stored procedure and custom ColdFusion file and place it on the root of the AM folder. Then in e-CM, have the "Home" record (or the record that is the default section) link to it.

The 10.4.27.01 Sales VM image has an example Homepage.cfm for demonstration purposes.

Content Migration

Once the templates and navigation are in place, it is time to transfer existing web content to e-CM. Hopefully by this point, the Information Architect has identified the locations of existing pages that need to be copied into e-CM.

A general rule of thumb for the time required to manually migrate pages from an existing site to e-CM is five pages per hour. If a site has more than 300 pages, it is recommended that you discuss the best method for importing pages with ASI Consulting, which has the experience and tools needed to migrate large amounts of existing content into e-CM.

Transitioning to Live Site

Once the customer has finished the user acceptance phase it is time to transition our work to the live website and database. These steps can also be used to move a website. If moving a website, simply back up the database and restore to a new server and update the System Variables table with new values as outlined below.

Note: Make a backup of the live database before migrating data from development to the live database!

Another option is configure the website using the live iMIS database. Since the e-CM tables do not directly affect the iMIS, changes can be made to e-CM without affecting iMIS. The exception would be if you are testing e-Series transactions.

Note: Before attempting migration, check the ASI website for updated instructions.

Transfer e-Series tables

Note: Any e-Series-specific values in the COUNTER table should be updated in the production database. The LAST_VALUE field in the test database should be set to match the LAST_VALUE field in the production database if this part of the setup needs to be transferred to the production site. Other e-Series-specific values in the COUNTER table that should be updated in the production database include Cmty_Discussion_Forum, Cmty_News, Cmt_Shared_Files, Cmty_Shared_Folders, Community, Content_Pages, and Reports.

- Make a backup of your production database.
- Verify that all users are out of the database.
- Add the SQL Login and Password used for ColdFusion access to the database
- Create ODBC to live database
- Truncate the following tables in the production database.
- gen_descriptions
- security_groups
- security_filters
- security_modes
- security_tables
- style_options
- contacts

- content_pages
- w_reports
- comment_types
- comment_log
- urls
- Community
- Cmty_Discussion_Forums
- Cmty_News
- Cmty_Shared_Files
- Cmty_Shared_Folders
- Run MSSQL Data Transfer Service (DTS) (in Enterprise Manager, select Tools> Data Transformation Service) and transfer the data from the same tables in the test database to the production database.

  Note: It is probably best to recreate this data in the live database, rather than transferring the data, as there could be IDs in both databases that represent different records (since test records have been added to the test database while actual records were being added to the live database).
- (optional) Run the SQL scripts that were used to populate the tables in the test database on the following tables.

  Note: Make sure the ID used for e-CM as the “Super Admin” is present.
- Name_security
- Name_security_groups
- (optional) The following table may also be transferred.
- Mail_lists

Note: If you have been altering the production database parameters independently of the test database, you may encounter problems with the System_Params table. Generally, you should be able to truncate the System_Params table and DTS the System_Params table from the test database. Be sure to back up a copy of the System_Params table so that you can restore this one table if you get unexpected results.

- Change the database that the ODBC data source points to from the test to the production database, or create a new ODBC data source for the production database and set it up in ColdFusion with a password.
- If you created a new ODBC data source that points to the production database, re-run the AppWiz to make sure that ColdFusion is pointing to the correct ODBC data source.
- Verify that the ODBC data source used by any reports is on the production server and pointing to the production database, not the test database.
- Run the All_Security_Triggers.sql and Update_Security_Cursors.sql scripts on the production database.

  Note: Whenever you make a change to your system setup, the e-Series variables are reset in the System_Params table. To correct this, log in as administrator and update the system variables (Admin> Lookups> Update System Variables).

Transfer e-Content Manager tables

1. Run the Prepare database script on your live database. This will install the stored procedures and triggers required by e-CM.
2. Copy the e-CM and e-Series files to the production server. If possible, try and keep the directory structure similar on both sites (for example, c:\e-CM on dev server to c:\e-CM on live server).
3. Empty the collection folder that contains the Verity search files.
4. Run the CMDDW.exe file included in the release to move the only the e-CM tables from your test database to your production database.
5. Rerun the e-CM Wizard to install the admin site on the production server as well as recreate the Verity collections and stored procedures.

6. Log in and select the Admin navigation item and then select the Site Maintenance navigation item.
7. Scroll to the bottom of the Installed Modules list and select the Deployment Variables item.

- Review the deployment variables to see if any information needs to be updated before launching the site. Few will need to be updated, but review them to be sure.
- MAKE SURE THE TPCachedPageResetMinute VARIABLE IS SET TO SOME TIME GREATER THAN 0! The higher the value, the better since this increases the cache time for tagged pages, which allows better performance for the system.

8. Verify that the Publishing Service is using the correct database. Edit the PublishService.exe.config file.
9. Once you have reviewed and updated all the deployment variables, select the Reset Server Variables navigation item.

   To publish the production site

1. After logging back into the Administrative Interface, select Website > Site Search > click Index collection.
2. Select Website Properties for the production site and reset the urls to the address of the production site.
3. Select Publishing Servers and change the IP address to the production server.
4. Go to your main website's navigation page.
5. Select the Publish Entire Site icon for your site.

   Note: Republishing the site will take some time. Do not refresh this page while waiting.

   Manually transfer tables (not recommended)

- While time consuming, you can truncate and transfer via DTS the following tables in the production to live database.
- I_Content

- I_Content_File
- i_NavMenu
- Product_Type_Delete
- U_Content
- u_NavMenu
- Admin_Section_Ref
- Admin_Security
- Admin_Security_Log
- Component_Email
- Component_Email_Variable_Ref
- Component_Interest_Category
- Component_Interest_Group
- Component_Ref
- Component_Script_Ref
- Content
- Content_Authority_Group
- Content_Authority_Producer
- Content_Authority_Ref
- Content_Change_Request
- Content_File
- Content_HTML
- Content_Link
- Content_Pages

- Content_Publish_Server
- Content_Security_Group
- Content_Workflow_Log
- Data_Type_Ref
- Directory
- Duplicate
- Duplicate_Group
- Duplicate_Keys
- Email_Contact
- Microsite
- Name_Security*
- Name_Security_Groups*
- Nav_Menu
- Nav_Menu_Feature
- Nav_Menu_Security_Group
- Nav_Menu_Setup_Log
- Nav_Menu_Website
- Nav_Menu_Workflow_Log
- Publish_Message_Log
- Publish_Priority_Ref
- Publish_Request
- Publish_Request_Detail
- Publish_Request_Status_Ref

- Publish_Server_Ref
- Sub_Component_Ref
- System_Variable
- Tagged_Page_Color_Ref
- Tagged_Page_Component_Column
- Tagged_Page_Format_Ref
- Tagged_Page_Format_Type_Ref
- Tagged_Page_Interest_Category
- Tagged_Page_Layout
- Tagged_Page_Portlet
- Tagged_Page_PortletIC
- Tagged_Page_Section
- Tagged_Page_Title_Ref
- Tagged_Portlet
- Tagged_Section
- Tagged_Section_Template
- Tagged_Template
- Tagged_Template_Field
- URL_Mapping
- User_Defined_Content_Labels
- User_Defined_Field
- Website
- Website_Content_Authority

- Website_Security_Group
- Workflow_Status_Ref
- Copy physical files from the dev server to the production server. If possible, try and keep the directory structure similar on both sites (for example, c:\e-CM on dev server to c:\e-CM on the live server).
- Create site mappings on the live server in IIS similar to the development site. Make sure to add the Template.cfm file to the list of default documents and edit the Custom Error codes.).
- Rerun the e-Series Application Wizard.

  Note: Do not select the Create Default Content option.
- Update the System_Variables table. Verify that the System_Variable.Name column matches the settings required for your live production database. This can also be configured through the Admin Portal under the Deployment Variables link.
- GECodeDirectory
- FileRootPath
- RootPath
- SecurePath
- SiteName
- CMWEPLicenseKey1
- CMWEPWebRoot
- SECollectionPath
- Delete files in the collections folder.
- In a browser, run the SearchCollectionSetUp.cfm file that is located in the AM\Admin\Search folder to manually recreate the collections.

- Verify that the Publishing Service is using the correct database. Edit the PublishService.exe.config file.
- Republish the entire site.
- Test, test, test!

Implementing the Template Gallery

The Template Gallery works with e-Content Manager (e-CM) to give your organization a professionally designed website without the need for custom software development. The Template Gallery provides 10 floor plans for homepage and interior page layouts with starter designs that define the look and feel of your website. A wizard guides you through the setup of the template. You browse for a design, read about the recommended uses for each template, and select and install the template onto your new Website.

The Template Gallery provides predefined floor plan designs. The floor plans include placeholders called content areas. These areas can hold various types of content (images, URLs, and HTML) that can be populated using the functionality of e-CM. You can modify the template to reflect your organization's branding and place appropriate content in homepage and interior page content areas.

The floor plan specifies the placement and dimension of the content areas and the navigational properties of the site. The floor plan is defined by ColdFusion files. The starter design provides the graphic elements of the site. Cascading style sheets define the starter design and set the background colors and fonts for the pages.

To work with the templates, it will help to be familiar with the following:

- Concepts of external cascading style-sheets (CSS)
- Web-safe color palettes and hexdec codes
- Advanced HTML (tagging and layout)
- Graphic design applications (sizing and cropping)
- Basic ColdFusion knowledge

In e-CM you should be able to:

- Change the title of a navigation item
- Work within the navigation structure
- Edit a content record
- Create links to content and functionality

Installation Requirements for Template Gallery

The Template Gallery requires the following:

- e-Series version 10.5.28.02 or greater
- ColdFusion
- e-CM and e-Series or e-CM only
- Template Gallery license

Note: When updating from a previous release, make sure to review all documents from each release so that you can fully understand how the updates will impact your business.

Installing the Template Gallery

These procedures apply to implementations using an iMIS database or to implementations using a e-CM only database. A separate license key is required.

Note: Contact ASI for a license key. If you run e-CM only, contact ASI for a license key and instructions.

To install the Template Gallery

When upgrading from a previous release, make sure to review all documents from each release so you can fully understand the impact on your business.

1. Make sure e-Series version 10.5.28.02 or greater is installed.
2. Back up your \Customer folder.
3. Request your license key from ASI.

4. Download the iMIS Template Gallery v1.0.exe file from the ASI Tech Support page (Product Releases, e-Series).

   Note: When the iMIS Template Gallery v1.0.exe file is downloaded and applied, the most current version of the e-Series maintenance release is also included.

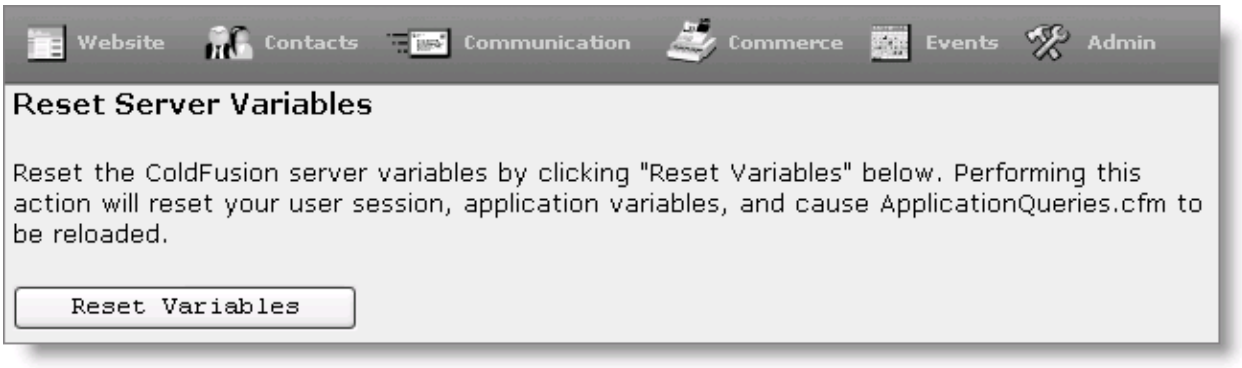
5. Extract the iMIS Template Gallery v1.0.exe file to the \Customer folder under your e-CM directory. A new Template Gallery folder with the appropriate files is added.
6. Run the appropriate database upgrade script from the \Customer\SQLScripts folder.

- For e-CM with iMIS, run the ASIUpgradeDBeSeries.exe script.
- For e-CM only, run the StandAloneCM5Setup.sql script.

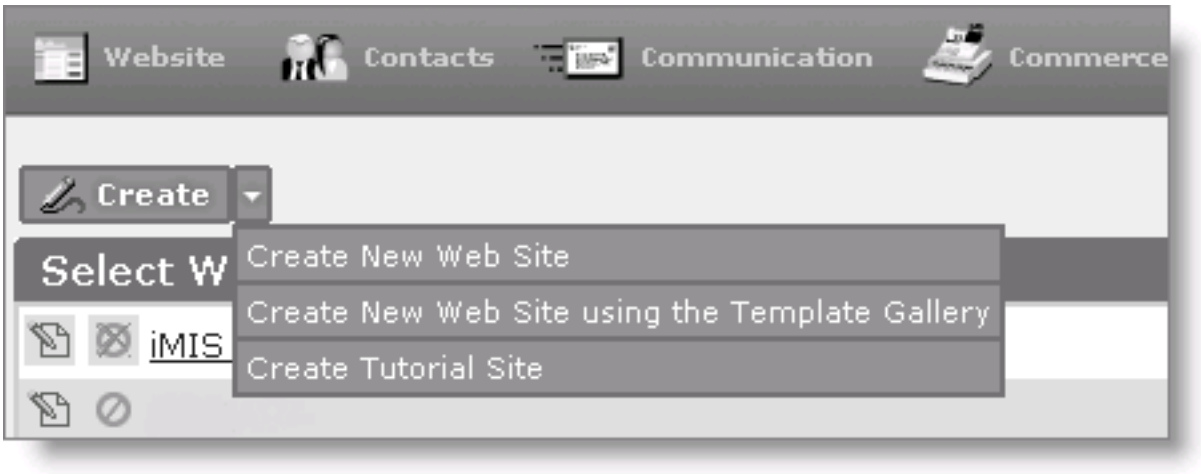
7. For sites using an iMIS database, re-run the e-Series application wizard maintaining your previous settings. This is not needed for e-CM only implementations.

   Caution! Do not run the e-CM wizard.

8. In the e-CM iMIS Website Administration Portal, select Admin in the top menu.
9. From the left menu, select Reset Server Variables.
10. Click Reset Variables.
11. Reapply all customization to your site as needed.
12. Select Website in the top menu.
13. From the left menu, select Sites. The Select Website to Manage page displays.
14. Verify that the new option, Create New Website using the Template Gallery, is in the Create drop-down list.



Reset Server Variables page



Create > Create New Website using the Template Gallery option

Creating a Website from the Template Gallery

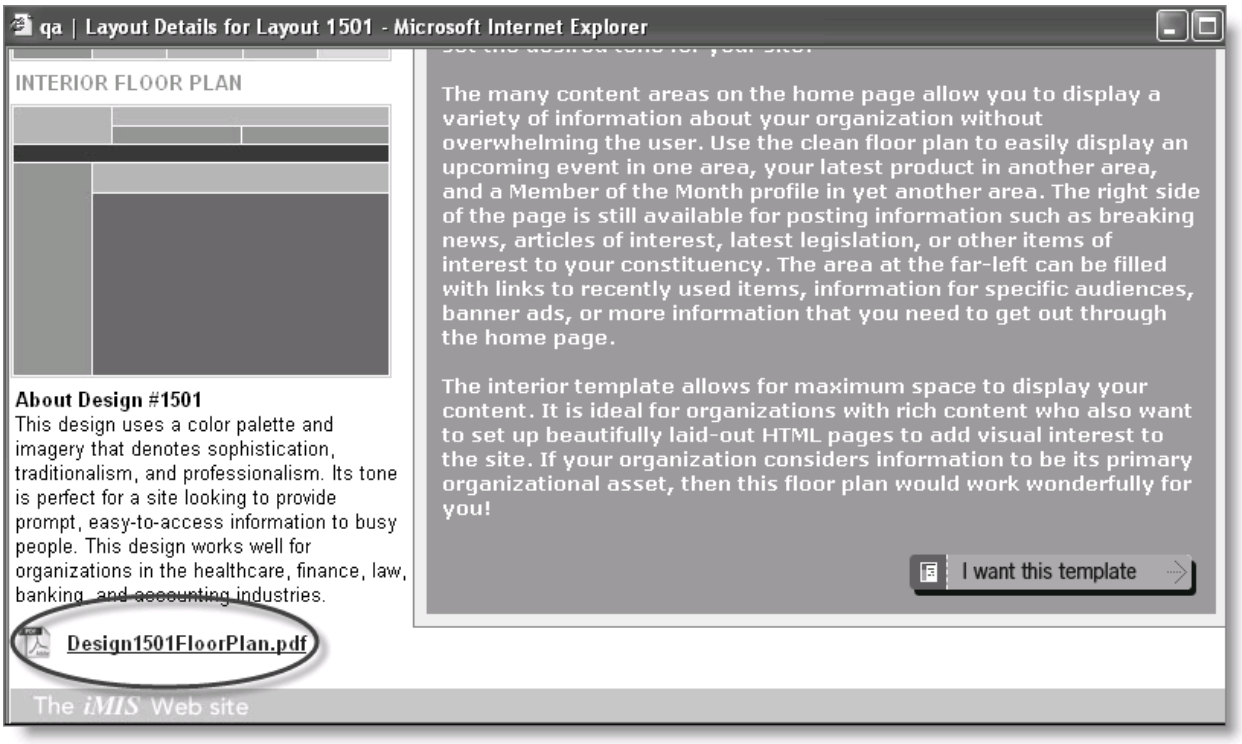
Each floor plan defines the content areas for your new site. The designs are described in the Template Gallery Wizard. A PDF file illustrates the design as applied to the template.

Note: A pop-up blocker can prevent use of the Template Gallery, publication of content, and dragging Surf to Edit icon to the browser links toolbar.

To create a website from the Template Gallery

1. Verify that the e-CM Publishing Server is running.
2. In the e-CM iMIS Website Administration Portal, select Sites in the left menu. The Select Website to Manage page displays.

3. Select Create New Website using the Template Gallery from the Create drop-down list.
4. On the General Setup for a New Website page:
   - Enter the website name and URLs.
   - If you are using more than one website, add the unique URL for your site.
   - Leave the defaults for the other options selected.
   - Click Create. The Gallery View page displays.
5. Select a template from the thumbnail images. The Layout Details page displays.
6. Scroll down and download the template layout PDF. You will use this to determine the size and placement of the graphics and other content you plan to insert.
7. Click I want this template. You may choose a different template by clicking Return to gallery view.
8. Select Yes, install this design. The system requires a few minutes to create your site.



Layout Details page

Applying a Different Template to an Existing Website

You can apply a different template to a website you created using the Template Gallery. However, the template layouts may contain different content areas. After you apply a new template, you may need to modify the content from your old template to fit the mismatched content areas.

Any new content areas will be added, and any additional content areas will not appear on the site. Use this chart to determine the results of applying the templates to an existing template site.

Note: The content areas are numbered so that they correspond with content areas in other templates with the same number. For example, if the original template has a content area 6, the associated content record will appear in content area 6 on the new template.

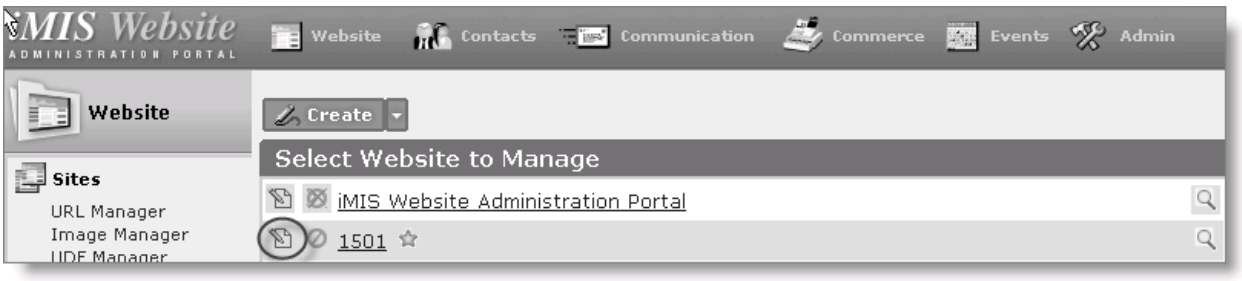
Changes to the Templates

Are more content areas on the new template than on the old template	You will have new content areas.	Add content to the new content records.
Are fewer content areas on the new template than on the old template	You will be missing content on your page, but no content records will be deleted.	Select the most important content and place that in the new content areas.
Are changes to the original template and you reapply the same template	You will see distortions to any content areas you may have resized.	Change the dimensions of the content again.
Are any differences in the size of the content areas	You will see distortions to the images in your website.	Resize the images to fit the new dimensions of the content areas.
Is e-Series functionality added to the site	The e-Series portal may not fit into the content area.	Resize the e-Series display area.

Navigation features are carried over to the new site. Therefore, the changes you made to the menus on the original site, such as adding drop-down menus, will be inherited by the new site.

To apply a different template

1. In the e-CM iMIS Website Administration Portal, select Sites on the left menu. The Select Website to Manage page displays.
2. Select the Edit Website Settings icon next to your website name. The Website Properties page displays.
3. Select the template image shown below the To choose a template… option. The Gallery View page displays.
4. Select a template from the thumbnail images. The Layout Details page displays.
5. Scroll down and download the template layout PDF. You will use this to determine the size and placement of the graphics and other content you plan to insert.
6. Click I want this template. You may choose a different template by clicking Return to gallery view.
7. Select Yes, install this design. The system will then take a few minutes of processing time to apply your template.



The Select Website to Manage page

The Website Properties page, template selection

e-Content Manager Usage

e-Content Manager (e-CM) is a powerful tool that allows you to organize and present content on a website. It provides a robust, yet easy to use content authoring, site navigation management, and workflow management features. e-CM provides the following features and benefits:

- Allows for maximum distributed content ownership throughout your organization regardless of technical ability or publishing authority
- Simplifies Website management with dynamically generated, database-driven content areas
- Maximizes the value of site content by targeting it to your site audiences, delivering more relevant content to the right audiences
- Delivers branded content to your web audiences with design template management

e-CM gives you the flexibility of working with a variety of content:

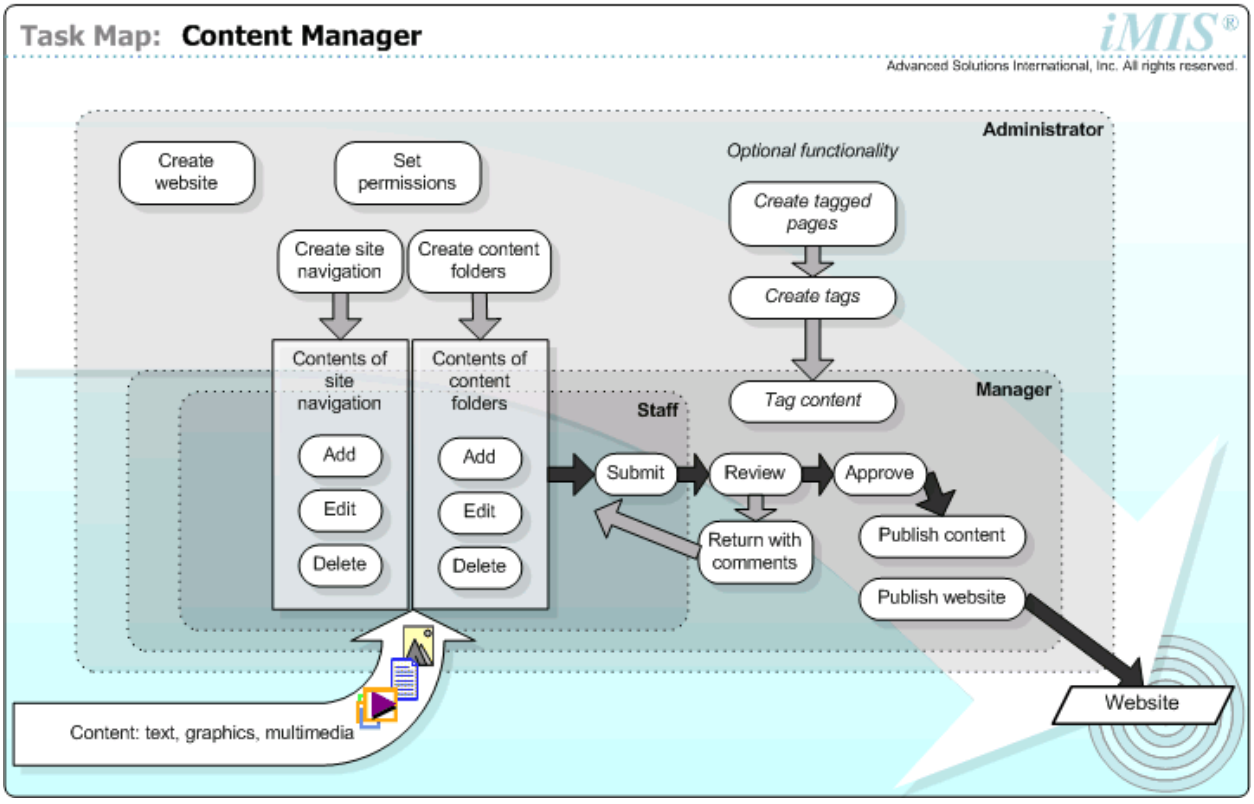
- HTML (Web pages)
- Files (for example, .pdf, .jpeg, .gif, and .doc files)
- Links (either to another page on your own website or to a page on the web)
- Tagged pages (“smart” pages)

Getting Started

To effectively use e-CM, you must learn the following:

- How to enter content
- Where to store content
- How to approve and publish content
- How tagging can be used
- How to build tagged pages

Note: Since the e-CM administrative interface uses pop-up windows for some functionality, you should disable any pop-up blocking software (for example, the Google toolbar) while using Content Manager. Otherwise, significant portions of the e-CM administrative interface will effectively be disabled.



e-CM Task Map

e-CM Permissions

Depending on the permissions you are assigned in e-CM, toolbars and pages may not display all of the options and information displayed in this guide.

Tagging for dynamic content

Website content can be associated with tagging categories, a process referred to as tagging. Tagging allows you to create categories for website searches and for personalization, but its primary purpose in e-CM is to tag content so that it can be displayed in special pages called tagged pages. A tagged page allows you to specify what type of content to retrieve and how to display this content. Tagging categories should be based on an analysis of how the information on the website is structured.

Site Navigation and Content Folders

Content in e-CM can be stored in Site Navigation items and Content Folders. By default, the Website page displays when you first select the e-CM administrative interface.

To access navigation items

- Select Site Navigation from the e-CM Admin interface.

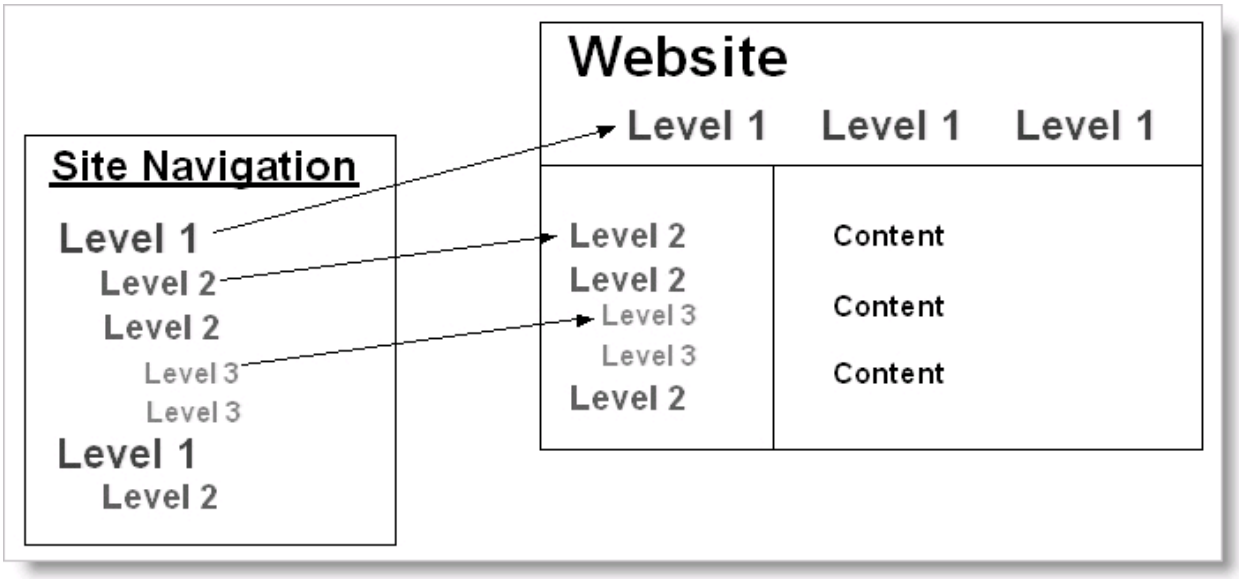
To access content folders

- Select Content Folders from the e-CM Admin interface

Note: You cannot access the Sites selection if you do not have permissions to work on more than one site. If you only have permission to work on one site, you must select Site Navigation to access the site for which you have permission.

Understanding Site Navigation Pages

Site navigation items correspond directly to the website's front-end interface. Depending on how the website is configured, level-one items that display to the left in bold correspond to graphical icons on the website's front end, while child items correspond to text links in the website's navigation.



Site Navigation

The branching structure of the Site Navigation page on the back end (the e-CM administrative interface) corresponds exactly to the branching structure of the website's navigation menu on the front end (the website as viewed by customers). Each level-one item (the ones in bold and all the way over on the left) generally corresponds to a graphical icon on the front end. The child items that display when you expand the menu on the Site Navigation page form the text links that can be seen when a link is selected on the website's front end.

Note: Use the plus icon displayed to the left of an item's name to expand the item and see its child nodes, and use the - icon to collapse the item. An empty icon displays next to an item if the item has no child items.

Note: A good way to see the relationship between the Site Navigation page and the website's front end is to view the website's front end in one browser window and the Site Navigation page in another browser window. For example, if there is a link labeled About Us, select this link on the front end and look at the links displayed, then look at the About Us navigation item and its child items on the back end.

Understanding Content Folders

Unlike the branching structure in site navigation items, the branching structure in content folders serves only to assist in organizing the website's content. A content folder is a place to store content for retrieval by:

- Site search
- Special dynamic pages called “Tagged pages”

The organization of a content folder does not affect the navigation or function of the web-site on the front end.

Understanding Content Records

Site navigation items and content folders do not actually contain content; they contain content records. Actual content (HTML files, other types of files, links, and tagged pages) is stored in content records. Content records are found inside site navigation items and content folders. A navigation site item or content folder can contain one or more content records. To add, edit, or delete content, you must be in the appropriate content record.

Note: You should not apply e-CM security to a content record when an e-Series link has been added to the navigation item's properties page. e-Series security controls access to e-Series modules.

Understanding Tagged Pages

A normal web page that is stored in a site navigation page consists of content that has been created for the specific site navigation item. On the other hand, a tagged page retrieves content based on how the content is tagged rather than where the content is located in a site navigation item or content folder. The retrieved content is then displayed on the tagged page. The simplest method to display tagged content is to display a list of links to the content, but tagged pages can also display HTML files and images.

Normal pages in e-CM are static. When you publish a content record, the content is written to a file on the webserver's hard drive. Tagged pages are dynamic, with self-contained instructions to retrieve content with specified tags and display this content. Tagged pages can retrieve content from site navigation items, but tagged content is usually stored in content folders.

Tagged pages can retrieve tagged content from your site navigation list, but most tagged content is normally stored in content folders.

Understanding Content Tagging

Website content can be associated with tagging categories, a process referred to as tagging. Tagging allows you to create categories for website searches and for personalization. A tagged page allows you to specify what type of content to retrieve and how to display this content. Tagging categories should be based on an analysis of how the information on the website is structured.

Before you begin flagging content for inclusion on tagged pages and creating tagged pages to display the flagged content, you must determine what types of content should be tagged, how to tag this content (naming conventions for tags), and whether content should be stored in site navigation items or content folders.

Tagging involves not only flagging relevant content and specifying the tags to display on a tagged page, but also specifying how the tagged content should be displayed.

Note: To assist in setting up your tagged content and tagged pages so that the desired content is displayed in the desired manner, it can be helpful to view your tagged content and tagged pages in one browser window and the website in another browser window.

Understanding Tags

A tag is used to flag relevant content. For example, if you determine that a particular piece of content is related to Energy Conservation, you can put an Energy Conservation tag on the content. You can then set up a tagged page to retrieve content related to Energy Conservation, and the tagged page will retrieve and display all content that is related to Energy Conservation.

Reviewing the e-CM Interface

The content producer's toolbar provides a single consistent set of controls. Simple, intermediate, and advanced versions of the toolbar are available to suit each user's needs. Functions that are not available to a user (due to the state of the content or the user's security permissions) are hidden and disabled.

Since some options apply only to navigation items and some apply only to content records, the toolbar provides different functions in navigation items and content records. Because of these differences, the toolbars will be referred to in this documentation as the navigation item toolbar and the content record toolbar.

Note: The navigation item toolbar also displays when viewing a content folder properties page.

Understanding the Content Record Toolbar

The content record toolbar displays in the content record properties page and in the HTML editing window.

Viewing the Navigation Item/Content Folder Toolbar

The navigation item toolbar displays when viewing a navigation item properties page if the content producer has permissions to edit navigation items. No toolbar displays if the content producer does not have permissions to edit navigation items.

The toolbar for navigation items and content folders is only available to users who can create and edit navigation items and content folders. The navigation item/content folder toolbar displays only for users who have Nav Creator and Nav Editor permissions in the authority group that owns the navigation item or content folder.

To access the toolbars

1. From the e-CM Admin page, select Website.
2. Select Site Navigation.

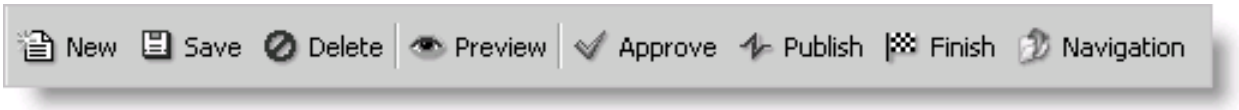
   Note: If you are using e-CM to run a single site, you will now see your site's navigation items. If you have more than one site, you will see the navigation items for your login account's default website, a preference which can be changed on your content producer preferences page (select Content Managers).

   While the toolbars in content folders and navigation items display differently, the toolbars function the same in both. The navigation item/content folder toolbar displays when viewing the properties page for an individual folder. The content record toolbar displays when viewing a content record in a content folder.

Simple toolbar mode for a content record

Intermediate toolbar mode for a content record

Advanced toolbar mode for a content record



Advanced toolbar mode for a navigation item properties page

Advanced toolbar mode for a content folder properties page

Setting a Toolbar Ceiling for Content Producers

You can set a toolbar “ceiling” for each user on a per-authority group basis with respect to content owned by the authority group. This can be used to restrict access to certain functions. For example, if you specify a toolbar ceiling of intermediate, a user can view only the simple or intermediate toolbars for content owned by the authority group.

Access for Intermediate or Advanced Toolbars Only

Toolbar access to properties is available only on the intermediate and advanced toolbar modes. Since a user with access to the properties page will see the properties page while entering a content record, this affects only the toolbar display and does not restrict any functionality.

The following functions are available only on the advanced toolbar:

- Copying content records: Because the advanced toolbar is the only way to copy content records, this effectively restricts this function to users who have advanced toolbar access.
- Moving content records: Because the advanced toolbar is the only way to move content records, this effectively restricts the function to users who have advanced toolbar access.
- Versioning: Because the advanced toolbar is the only way to use versioning, this effectively restricts this function to users who have advanced toolbar access.

Toolbar icons

- New – always displays. In a content record, select this icon to create a new piece of content in the current content folder or under the current navigation item. If you do not have permission to create content in the current location, an error message displays and the operation fails. In a navigation item, select this icon to display a list of navigation items and opens the insert box underneath the user's current navigation item (you insert a new navigation item).
- Save – always displays. In a content record, this icon is disabled in the intermediate and advanced toolbar modes if the content is Approved, Published, or Archived and the Always go to modify option on the user's Producer Preferences page is not enabled. You must first select Modify to put the content into modify mode unless the Always Modify option is enabled. Select Save to save the current page and return to the current location. In a navigation item, this icon is always enabled and saves any changes made to the navigation item's properties.
- Delete – always displays. In a content record, this icon is disabled if you do not have approval rights and the content state is Approved, Published, or Archived. A confirmation message displays when you select this icon. In a navigation item, select this icon to

delete the navigation item, all of the navigation item's content records, and all of the navigation item's child navigation items and their children. A confirmation message displays when you select this icon. The confirmation indicates how many child items will be deleted.

- Tag – (only if e-CM is licensed for Tagging) always displays on the intermediate and advanced toolbars for content records if tagging is licensed. This icon is disabled if the content is Approved, Published, or Archived and the Always go to modify option on the user's Producer Preferences page is not enabled. You must first select Modify to put the content into modify mode unless the Always Modify option is enabled. Lets you open the content tagging form in a new pop-up window.
- Preview – always displays. In a content record, select this icon to open a new window displaying the content (as last saved) inside the template associated with the navigation menu Item or content folder. In a navigation item, selecting this icon also displays the content (as last saved) inside the associated template unless there is more than one content record in the navigation item and the view the default content record only option is not enabled. If there is more than one content record in the navigation item and the view the default content record only option is not enabled, the preview will display all content records as last saved according to the specified option:
- Request Approval – displays only on the content record properties toolbar and only if the user does not have permissions to approve the content record. This icon does not display on any toolbar for simple sites, since simple sites do not include workflow. If the user has approval rights for the content record, the Approve icon displays instead. This icon is only enabled if the content record is in the Working state (if the content record is not in the Working state, there is nothing for which to request approval). Lets you save the current work and place the content in the Pending Approval state. The content approver for the content authority group will be notified that the content is awaiting approval. This notification always occurs in the content approver's e-CM task list, and can also occur by e-mail.
- Approve – displays only if the user has permissions to approve the selected content. This icon does not display on any toolbar for simple sites, since simple sites do not include

workflow. If the user does not have approval rights, the Request Approval icon displays instead. This icon is only enabled if the content record is in the Working state (if the content record is not in the Working state, there is nothing to approve). Lets you save the current work and place the content in the Approved state. The content can then be published.

- Publish – always displays on the content record properties and navigation item properties toolbar. This icon is only enabled if the content record is in the Working or Approved state and the user has approval permissions. Lets you save the current work and send a request to the publishing server to publish the content.
- Modify – displays only on the intermediate and advanced toolbars and only if the Always go to modify option on the user's Producer Preferences page is not enabled. This icon is disabled if the user does not have content editor permissions for the content record. Lets you place content that was in the Pending Approval or Approved state back in the Working state, or to copy content that was in the Published or Archived state to a new content record and place the new content record in the Working state (after selecting Save).
- Revert – displays only on the intermediate and advanced toolbars for content records. This icon does not display if the Always go to modify option on the user's Producer Preferences page is enabled. This icon is disabled if the user does not have content editor permissions for the content, if the content is in the Published or Archived state, or if this is the first version of the content. Lets you delete content that is in the Working, Pending Approval, or Approved state and return the content to its state as previously published.
- Properties – displays on the intermediate and advanced toolbars in content records. If you are editing an HTML file, select this icon to display the Content Properties page.
- Editor – displays on the intermediate and advanced toolbars in content records. Lets you display the Content Editor page (either the Ektron editor or the text area, depending on the user's preferences).
- Versions – displays only on the advanced toolbar for content records. This icon is disabled if there is only one version of the content. Lets you display a pop-up window that lists all previous versions of the content. You can copy any version from this list to the

Content Editor or Content Properties page.

- Copy – displays only on the advanced toolbar. Lets you make a copy of the content, which is then treated as new content.
- Move – displays only on the advanced toolbar for content records. Lets you move the current content to selected website, navigation item, or content folder.
- Folder – displays for content records. Lets you display the Content Folders page.
- Simple – displays only on the intermediate and advanced toolbars. Since there is only one toolbar mode for navigation items and content folders, this icon displays only on the content record toolbar. Lets you change the toolbar to simple mode.
- Intermediate – displays only for content records. Lets you change the toolbar to intermediate mode.
- Advanced – displays for content records. Lets you change the toolbar to advanced mode.
- Finish – displays on all toolbars. Lets you save any unsaved work and return to the previous page. For example, selecting Finish while using surf-to-edit returns the user to the website. Selecting Finish while creating pages in content folders returns the user to the folder that contains the content that was being edited.

Tab Icons

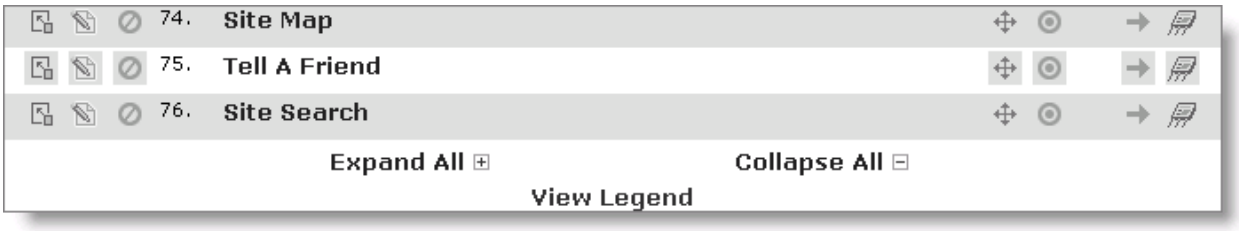
There are gray icons displayed next to the items on the Site Navigation and Content Folders pages. The icons displayed to the left of an item perform the following functions:

- Allows you to insert a new navigation menu item or bucket
- Allows you to edit content inside the item or bucket
- Will delete a navigation menu item or bucket and all of its “children”

The icons displayed to the right of an item allow you to move items and promote or demote the items in the e-CM hierarchy. The last icon is used to publish content in a site navigation item or content folder.

To see the function of the icons and symbols on the e-CM interface, select the View Legend link at the bottom of the Site Navigation page.

There are also links to expand the entire tree of parent/child items (Expand All) and to collapse the tree to display only parent items (Collapse All).



Links in the Navigation List

Creating Navigation Items

Section Goal

In this section, you will learn how to set up your website's navigation, create, approve and publish navigation items, and add content records to the navigation list.

Inserting a Site Navigation Item

The site navigation you create is tied directly to your website navigation so review it carefully before you publish your website.

You can create a new navigation item on the Site Navigation page. New navigation items can be previewed before they are published, but they are not visible on the front end until they have been published. You can edit navigation items before or after they have been published.

Insert a new navigation menu item or bucket

Edit content inside the item or bucket

Delete a navigation menu item or bucket and all of its “children”

Move a navigation item

Move navigation item below target item

The icons displayed to the right of an item allow you to move items and promote or demote the items in the e-CM hierarchy. The last icon is used to publish content in a site navigation item or content folder.

To insert a navigation item

1. From the e-CM Admin page, select Website> Site Navigation.
2. Select the Insert New Item icon to insert a top-level navigation item, or select the parent navigation item and select New to create a child navigation item.

   Note:

- You can change the location and hierarchical level of a navigation item after it has been created if necessary.
- Do not use DOS reserved words in the name of the navigation item. (NUL, AUX, CON, COM1-4, LPT1-3, and PRN)

3. Enter the name of the new navigation item.
4. Select Go.

To enter navigation properties

1. From the e-CM Admin page, select Website> Site Navigation.
2. Select the new navigation item.
3. Enter the Properties for the navigation item.
4. Enable the appropriate display option you the user to see.
5. If you want the navigation item to become the website's homepage, select Make Website Homepage.
6. Select the Authority Group and Section Owner. The Section Owner will receive e-mail reminders if the content in the section is not published within the specified number of days.

Note: If you do not want to be notified if content in a navigation item is not published, change the number in the Section considered expired if field to 0. This may be appropriate if the navigation item contains content that will rarely be updated.

7. (optional) Insert graphical images.
8. Select Save on the navigation item toolbar.

Entering Navigation Item Properties

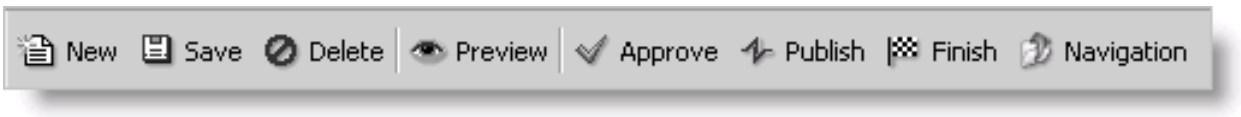
Note: If you do not have permission to edit the navigation item's properties, only the navigation item name and the name of the authority group that owns the navigation item display on the navigation item properties page.

Note: It is generally not a good practice to change navigation buttons after a site is set up. It is also recommended that you do not insert buttons on level-two or level-three text links.

To access the navigation Properties page, select the navigation item. The Properties page is divided into the following sections:

- Content Producer's Toolbar
- Properties
- Workflow Management
- Navigation Images
- Content Records

Toolbar

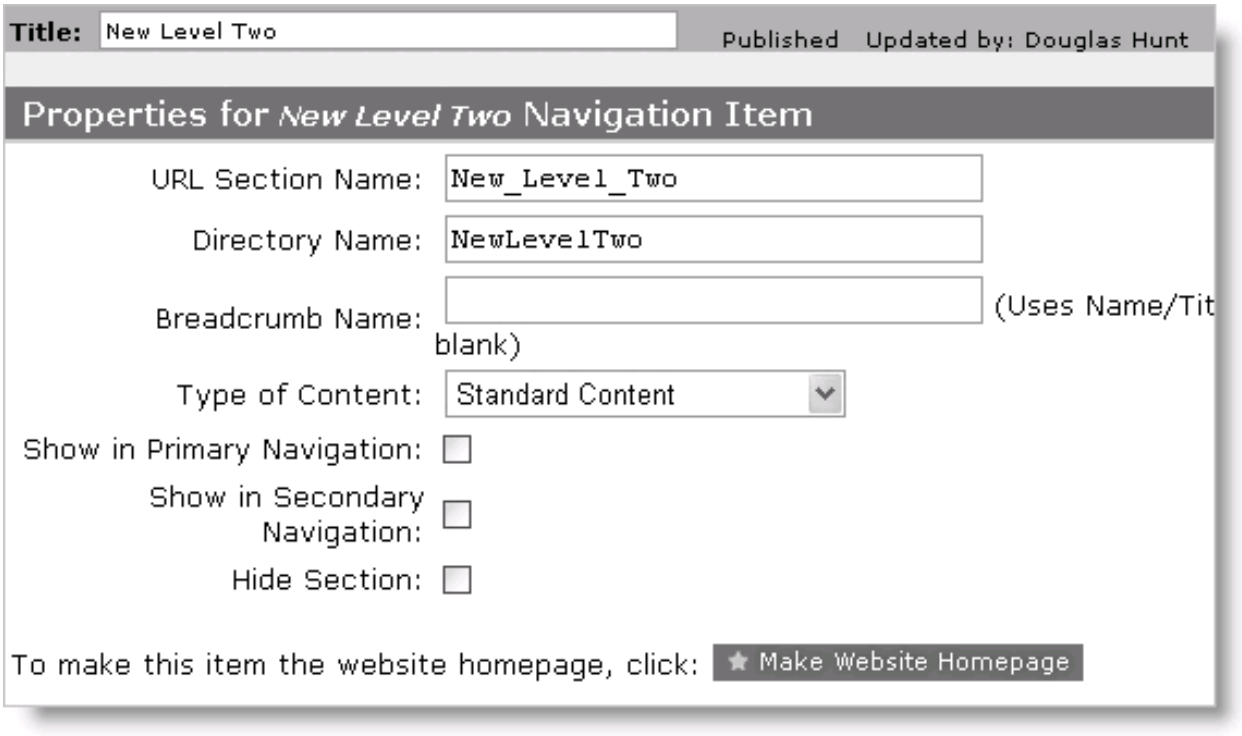


Advanced toolbar mode for a navigation item properties page

- New - insert new navigation item
- Save - save navigation information

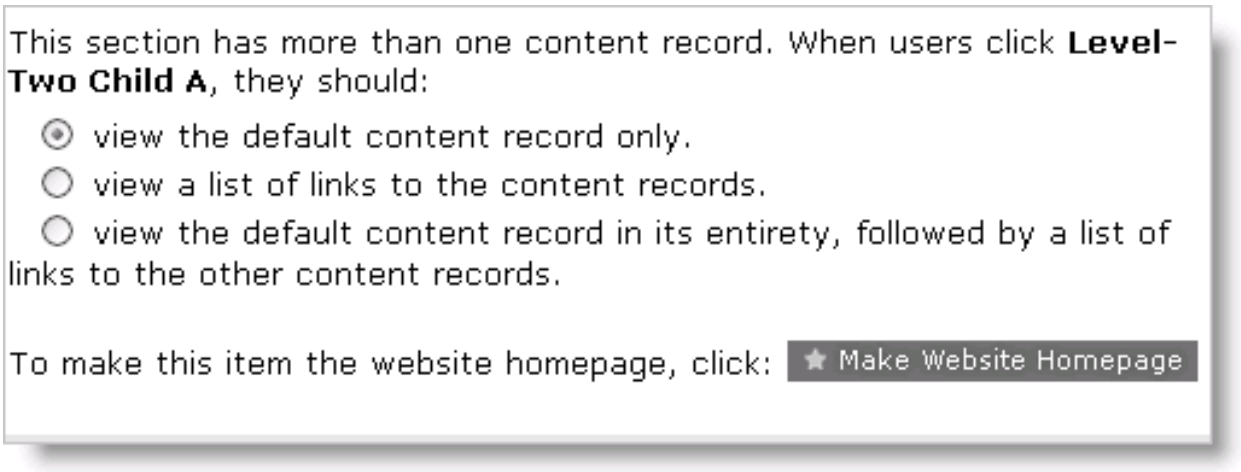
- Delete - delete the navigation item, all associated child records, all child navigation items and their associated records
- Preview - preview the navigation item as it will appear on the website
- Approve - approve all content; changes status of Working (red light) or Pending Approval (yellow light) to Approved (green light, ready to publish); if user does not have approval rights, the Request Approval icon is shown
- Request Approval - change the status of content to Pending Approval (yellow light); if user has approval rights, the Approve icon is shown
- Publish - publish any approved content
- Finish - save work
- Navigation - return to the Site Navigation page

Navigation Properties

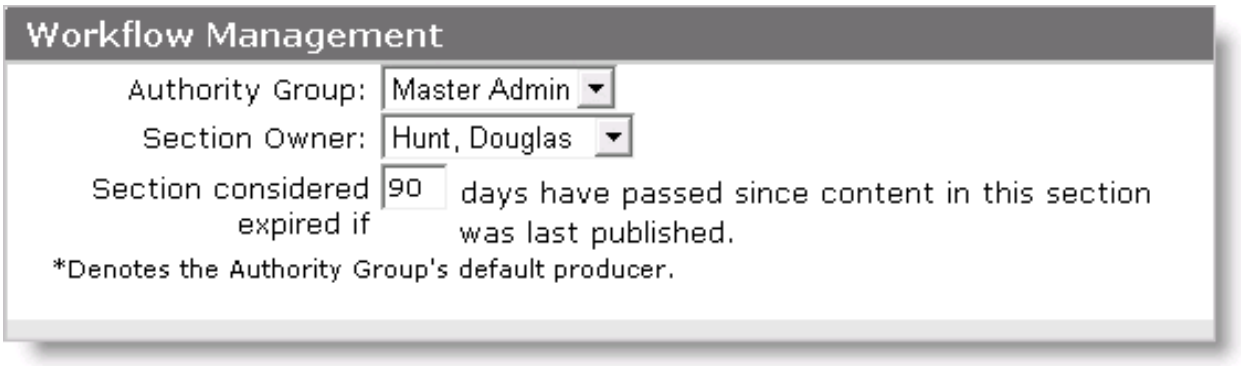


Properties for New Level Two Navigation Item

- Unless the navigation item uses a button, the text in the Title field is the text (link) that displays on the front end of website.
- The URL Section Name is system-generated. If you have to change the URL name, be sure not to put any spaces or non-standard characters in the name.
- The Directory Name, which specifies the directory in which the navigation item content is stored when published, is system-generated. You should not change this unless you have a specific need to create a particular directory name.
- If the Breadcrumb Name field is empty, the breadcrumb trail displays the name of the navigation item. An alternate breadcrumb name can be entered.
- You should leave the default Standard Content setting for the Type of Content option unless you want to insert an e-Series page in the navigation item.
- You generally should not enable the Show in Primary Navigation option for new navigation items unless you are redesigning your website's template.
- You generally should not enable the Show in Secondary Navigation option for new navigation items unless you are redesigning your website's template.
- If you do not want the navigation item to display on your website's front end, you can enable the Hide Section option. This is useful if the navigation item is currently under construction.
- Display options:
- Default - display only the default record (first content record marked by a red star)
- List of links - display a list of links to the content records; records are listed in the same order as they appear on the properties page
- Combo - display the default record followed by a list of links to the other content records; this option cannot be used if the default record is a tagged page.



Choose the Level-Two Child properties



Workflow Management window

The drop-down lists at the top show which authority group owns the content in the navigation item and who the Section Owner is. Being a section owner means that you will get the e-mail reminders if content in the section is not published for the specified number of days (the default is 90 days). Permissions and authority groups will be discussed in a later section.

Note: If you never want to be notified if content in a navigation item is not published, change the number in the “Section considered expired” box to 0. This may be perfectly appropriate if the navigation item contains content that will be updated very rarely.

Navigation Images

This section is used to upload graphical images for the navigation item. The images would replace the text used for the navigational item. However, we do not recommend that you use images for level two or three text links and you should avoid adding images after your website is set up.

Content Records

In this section, you can add links to content records.

Inserting Content Records

The content records section of the navigation item properties page will show all content records in the navigation item. By default, the order of the records will be the order entered, with the first record entered on top. The first record will have a red star next to its name, indicating that it is the default record. The default record is an important distinction when a navigation item has more than one content record.

To insert a new content record

To insert a new content record into an empty navigation item:

1. Select Create. Depending on your preferences, this will take you to the content record properties page or directly to the WYSIWYG editor.
2. To insert an additional content record into a navigation item that already contains content:
3. Select Insert next to an existing content record. Your new record will appear beneath the record whose insert button you used). Depending on your preferences, this will take you to the content record properties page or directly to the WYSIWYG editor.

To delete content records

To delete an existing content record:

1. Select the Delete ( ) icon to the left of the content record's name.
2. Click OK when the confirmation window displays.

To edit existing content records

To edit an existing content record:

1. Select the Edit ( ) icon to the left of the content record's name, or on the name itself. Depending on your preferences, this will take you to the content record properties page or directly to the WYSIWYG editor.

To move content records

To move a content record:

1. Select the Move ( ) icon to the right of the name of the content record you wish to move.
2. Select the Target ( ) icon to the right of the name of the content record you want to move it below or the Target icon on the top bar of the content record section to make it the default record (first in the list).
3. Re-publish the navigation item to make your changes live on the front end.

To preview a content record

To see what an individual content record will look like on the front end:

1. Select the Preview ( ) icon to the right of the content record's name. If you wish to preview the appearance of the entire navigation item, use the preview button on the content producer's toolbar.

To copy a link to the content record

If you wish to create a link to an individual content record (for example, to insert in a web page elsewhere on your site):

1. Select the small clipboard icon ( ) to the right of a content record's name. This will copy the path information required to create a link to the content record into your system clipboard.
2. Go to the location where you wish to create the link to this content record and use your system's paste functionality (Ctrl+V) to paste the path information into the link. Finish editing your link as you otherwise would.

To publish individual content records

You can use the Publish ( ) icon to the right of a content record's name to publish that individual content record. Be sure to check your work on the front end - you may also need to re-publish the item, depending on the display options and number of content records.

Using e-Series Pages in e-CM

You can display e-Series pages on your website's front end inside your website's template. You can also connect applications and interactive pages (for example, an ASP page or an abstract management system) to your website.

Note: You should not use e-Series pages in navigation items that contain other content records. If you leave the e-Series page as the default record and set the navigation item to show the default record only, this will work. However, if the navigation item's display options are later changed to show other content records (for example, to show a list of content records), the options will not work properly.

To display e-Series pages in e-CM

1. Select Site Navigation.
2. Select the Insert New Item icon.
3. Enter the name of the new navigation item and click Go.
4. Select the new navigation item to display the navigation item's properties page.
5. Select the e-Series page to display in the navigation item from the Type of Content drop-down list.
6. Select Save.
7. Select the Publish icon on the content producer's toolbar.

To display other special pages in e-CM

You can create links to other special pages (for example, Advanced Search, Site Map, and Tell A Friend). These special content types display a special page when the website user selects the navigation item.

1. Select Site Navigation.
2. Select the Insert New Item icon.
3. Enter the name of the new navigation item and select Go.
4. Select the new navigation item to display the navigation item's properties page.
5. Select the special page to display in the navigation item from the Type of Content drop-down list.
6. Select Save.
7. Select the Publish icon on the content producer's toolbar.

Working with Navigation Items

Once you are comfortable with editing content records and setting basic options for navigation menu items, you can look at the navigation menu items list - the main CM interface.

Understanding Navigation Items

Here are some key facts about the navigation menu:

- The navigation menu corresponds directly to the point-and-click interface on the front end of the website.
- Level-one items, the ones which appear in bold and are not indented, generally correspond to a graphical button on the front end of the website.
- Navigation items below level one generally correspond to text navigation links on the front end.
- Content Folders, which use a different interface, is a place to store content used by special “smart” pages called “tagged pages.”

- Parent navigation items can have “child items” and those child items can have child items of their own (and so on).
- The actual content is stored in content records.
- A navigation item may have one content record or many.
- When you publish content in a navigation item, you can publish an entire item and all of its content records or choose to publish an individual content record.
- You can expand items or folders to reveal their children by clicking the plus (⊞) button to the left of the item's (or folder's) name.
- You can collapse items or folders to hide their children by clicking the minus (⊟) button to the left of the name.
- If you see neither a plus nor a minus next to a navigation item, it has no children.
- There is a link at the bottom of the navigation menu page (View Legend) that will show you what all the buttons on the list mean.
- There are also Expand All and Collapse All links at the bottom of both the Navigation Menu list and the Content Folders list. Expand All shows all children of all items, and clicking Collapse All will collapse the menu and show you only level-one items.

  To manage the navigation list

  These are some functions you can perform from the list:

- Move navigation items
- Delete navigation items
- Promote navigation items (make children parents)
- Demote navigation items (make parents children)
- Publish navigation items (and all their approved content)
- Insert new navigation items

Note: In order to move, delete, promote, demote, and insert new navigation items, you will need to have “Nav Creator” privileges in the group owning the items or in the special “Master Admin” group. In order to publish an entire navigation item, you need “Nav Editor” permissions.

Levels on the Navigation Items List

Items on the navigation items list have a parent-child structure, with “level-one” items being the ultimate parents. In general, level-one items are usually represented on the front-end by graphical icons, while most items at level two and below are text links (this may vary depending on your site's design). The parent-child structure of navigation items mirrors the parent-child structure of navigation on the front end of the website.

Which navigation items a user will see when looking at the list will depend on authority group membership. Anyone who is a member of the Master Admin group will see all navigation items. Other users will see a “family” of items (starting with the level-one parent) only if at least one of the items is owned by an authority group to which they belong.

Parent-Child Navigation Relationship on Back End

Navigation Items on Front End, Showing Same Relationship

To view all parent-child relationships

To show all parent-child relationships in your site's navigation menu, select the Expand All link at the bottom of the navigation item list.

To view level-one items only

To collapse the display of navigation items:

- Select the Collapse All link at the bottom of the Navigation Menu page to see only “level-one” items.
- Select the “+” buttons next to a parent item to see its immediate children.

Note: You generally will not be creating new level-one items because your website's front-end is constructed very carefully with an HTML table, which holds graphical buttons. To add a new level one, you would need to add a new button and modify the design your website's template so that the button will display properly.

Inserting New Navigation Items

When a new navigation item is inserted:

- It is inserted below the place where you insert it.
- It will become a child of the item you insert it below (for example, if you insert below a level-one item, the new item will be a level-two).
- It will become a last child item if the item below already has children.

To insert a new item as a child of an existing item

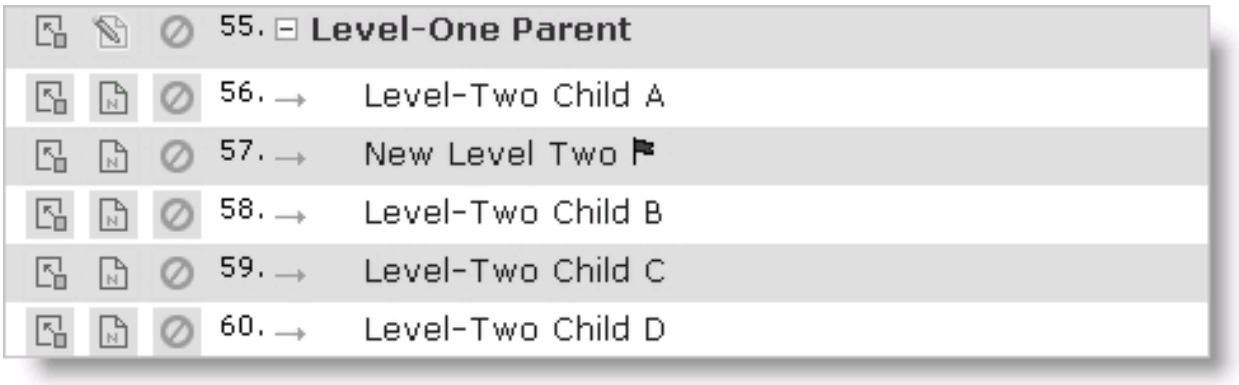
1. Select the Insert Item ( ) icon to the left of the item above where you want to insert it.
2. Enter the name of the item you want to insert.
3. Click Go.

After your item is inserted, you will see a red flag to the right of the item, indicating that it needs to be published before it will be visible to users on the front end.

To change or move an item

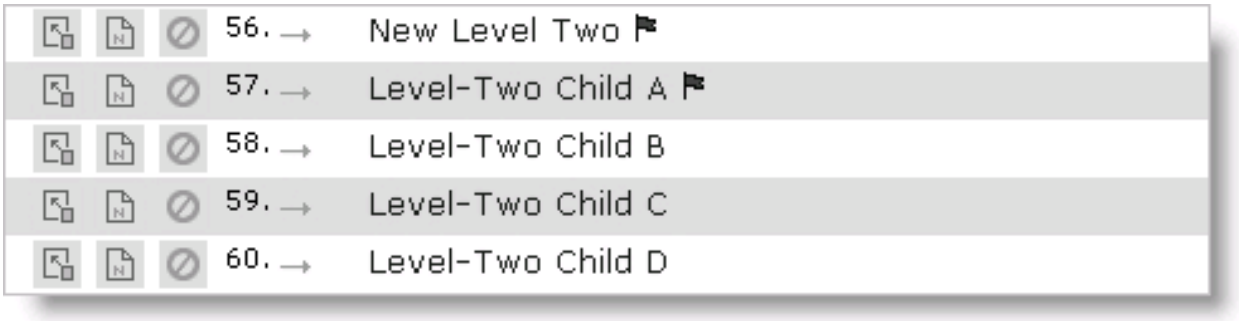
1. Insert your new item by selecting the Insert Item icon to the left of “Level-One Parent.”

   The new item will become the last level-two child of “Level-One Parent” (following the rule stated above that if an item already has children, the newly inserted item will become the last child item).
2. Move your new item up by selecting the Move icon to the right of your new item and the Target icon to the right of “Level-Two Child A.” This will place “New Level Two” as the second level-two, right under “Level-Two Child A.”



New Item Now Second in List

3. Click the Move icon next to “Level-Two Child A” and the Target icon next to “New Level Two.” This will move “Level-Two Child A” below “New Level Two.”



New Item Now First in List

To insert an item as a level-one

If you need to create a new level-one item, you can do it one of two ways:

- You can use the Insert icon on the top bar of the navigation items list to insert an item directly as a level-one.
- You can simply create an item as a child of another item and then promote your new item until it reaches level one.

Moving Items

The two icons involved in moving an item are the Move ( ) icon and the Target ( ) icon, which appear on the right side of the list across from each item.

When you start moving menu items around, you are performing some fairly complicated operations. You are moving things that have children under other things that have children, and dealing with different levels in the menu. It is common to move items to the wrong place now and then. If you move something to the wrong place, you can always move it again, and nothing is going to affect the front end of the website until you re-publish.

To move an item

1. Click the move button to the right of the item's name.
2. Click the target button to the right of the item under which you want to move it.

When you move an item, e-CM follows two rules about where it should go:

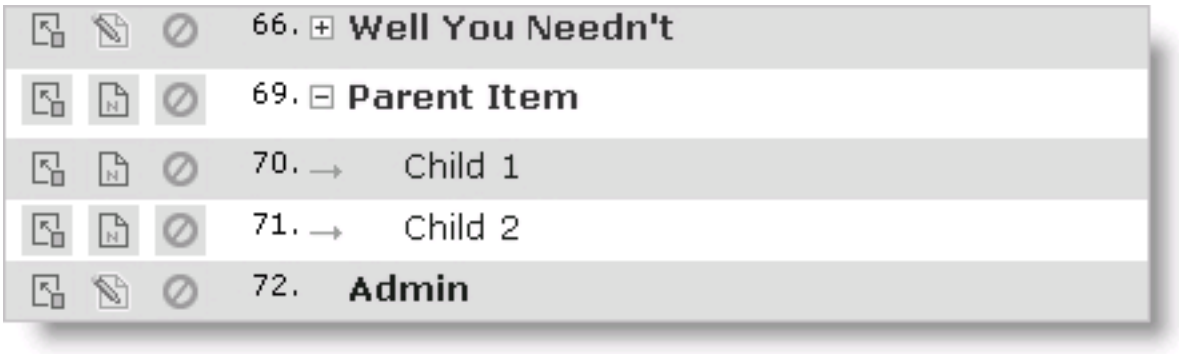
- It will be inserted after (below) the targeted item.
- It will be inserted at the same level at the targeted item.

This sounds simple, but the results are not always what you would expect.

For example, consider a level-one item, “Parent Item” with two level-two child items called “Child 1” and “Child 2.” If you wanted to move “Child 2” up to the first position right under “Parent Item,” there are two obvious things to do, neither of which will work.

- If you click the move button to the right of “Child 2” and the target button to the right of “Parent Item,” Child 2 will actually become the next level-one item, above “Admin.”
- If you click the move button to the right of “Child 2” and the target button to the right of “Child 1” Child 2 will not move - it is already the next item after “Child 1” at the same level.

How would you do it? You would click the move icon next to “Child 1” and then the target icon next to “Child 2.” This will make “Child 1” the next item in the list after “Child 2” and at the same level. In other words, in this case, you don't move Child 2 up, you move Child 2 down.

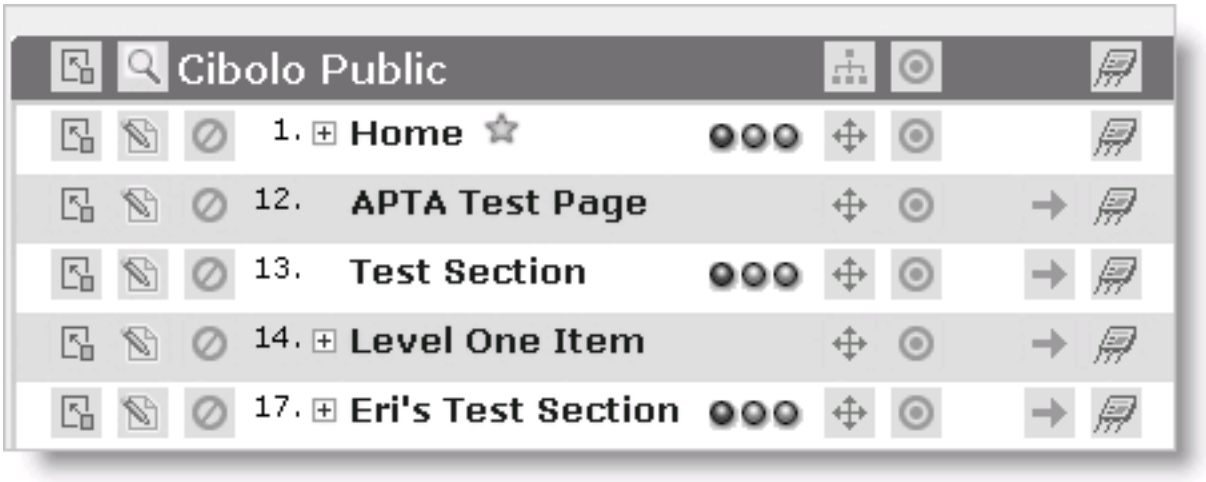


Moving Example

To move an item to the beginning of the list

1. Click the move icon to the right of the item you wish to move.
2. Click the target icon on the bar at the top of the navigation item list.

   Your item will now appear at the top of the list, and will be a level-one item. Any children will be moved along with the item, as is always the case.



Top bar of Navigation Item List Showing Target Icon

Deleting Items

Deleting navigation menu items is extremely simple, although it does require “nav creator” permission in the authority group controlling the item or in the “Master Admin” group.

To delete a navigation item:

1. After logging in to the administrative interface, go to the site navigation list.
2. Select the Delete icon to the left of the name of the item you wish to delete.
3. After carefully reading the warning message, click OK to delete the item. This will delete the item and any children.

   Note: When you delete an item with child items, e-CM will delete all the child items as well. If you want to save the children, but delete the parent, you must move the child items to another parent first. It is important to read the warning messages carefully before you click OK, because the message will indicate if child records will also be deleted.

   #### Promoting and Demoting Navigation Items

   You can promote or demote navigation items in the parent-child hierarchy by using the Promote ( ) and Demote ( ) icons to the right side of the navigation menu. You will need “nav creator” permission in the authority group controlling the items involved (or in the “Master Admin” group).

   Note: After an item is promoted or demoted, a red flag will appear next to it, indicating that it needs to be published before it will appear in its new location on the front end of the web-site.

   You will notice that the buttons do not appear to the right of every item.

   Level-one items don't have a promote button because they can't be promoted any further (they are already at the top level).

   Any item that is already one level down from the item immediately above it will lack a button because demoting it further would make it an “orphan” with no direct parent. The practical reason for the “no orphans” rule is that in front end web pages the links to a child item are contained in the parent item's navigation. An “orphan item” with no parent would have no link to it in the website's front-end navigation.

   The best way to learn how to promote demote and move items is to create some test items without any content in them and experiment. Unless you publish your items they will not be visible on the front end, so you can do this even when your website is fully “live.” Make sure that you clean up when you are done.

To demote a navigation item

1. After logging into the administrative interface and going to the navigation item list, click the demote ( ) button to the right of the item's name.
2. Re-publish the item to make your changes visible on the front end of the website.

After you demote an item, it will become a child of the item immediately above it in the list.

To promote a navigation item

1. After logging into the administrative interface and going to the navigation item list, click the promote ( ) button to the right of the item's name.
2. Re-publish the item to make your changes visible on the front end of the website.

After you promote an item, it will go under the next item above it in the list, which is at the level you have promoted it to.

Approving and Publishing Navigation Items

New and revised content must be approved and published before it can be viewed on the website's front end. You can approve and publish an entire navigation item or a single content record.

After you select the Approve icon, the page will reload and go to the properties page of the navigation menu item where you can select the Publish icon at the upper-right corner to publish. A publishing status window will display. After the publishing is done, you can look at the new content on the front end. You may need to press Shift and select Refresh so that your browser does not display an outdated cached version of the page.

Note: Publishing takes place at the navigation item level, not at the content record level.

Note: If you have authority to approve and publish a content record, selecting Publish in the content record will both approve and publish the content.

Approving and Publishing Content

1. Select Website.

2. Select Site Navigation.
3. Select the navigation item to be approved and published.
4. Select Approve.

   Note: The Approve icon that displays on the navigation item toolbar approves all modified content in the navigation item. The Approve icon that displays in the content record properties toolbar approves only the content record whose properties are currently displayed.
5. Select Publish. A confirmation message displays if you are publishing an entire navigation item. Select Publish to publish the navigation item.
6. (optional) To force all content to be regenerated, select the checkbox.
7. Select Publish. A window displays to indicate the publishing status.

   Note: If your web browser has a pop-up blocker (for example, the Google Toolbar) enabled, the window that displays the publishing progress will not display and a blank page will display after publishing has been completed. You should disable any pop-up blocker before publishing navigation items.
8. Select Close Window to close the publishing status window.

   Who Can Approve Content

   To approve content, a user must have “Content Approver” authority in the group which controls the content (or in the “super group” Master Admin).

   Who Can Publish Content

   Several authority group permissions have some affect on publishing.

   Content Editors

   Users who can edit but not approve content (Content Editor) can publish only content records which have already been approved by someone else and are owned by their authority group(s).

   Content Approvers

Users who, can edit and approve content (Content Editor and Content Approver) can approve and then publish any content record owned by their authority group(s).

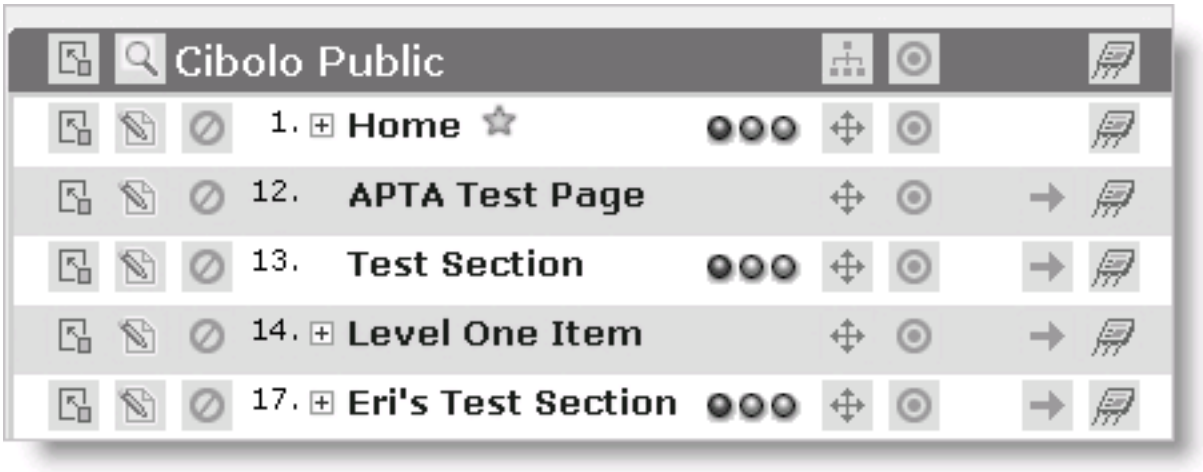
Nav/Folder Editors

Users who can edit and approve content and have Nav/Folder Editor permission can publish all approved content in a navigation item or folder. In the case of folders, this is mostly a convenience. In navigation items, Nav/Folder Editors have some abilities that other publishers do not:

- They can publish a new item which has never been published before (this must be done by a Nav/Folder Editor before any content in the new item will appear on the front end.
- They can see and change settings for a navigation item or folder. This means that a Nav/Folder Editor should be involved in the publishing of any item which requires such a change (for example, if a second content record has been added to a navigation item which formerly contained only a single record).

Members of Master Admin

Any member of the Master Admin “super group” can publish all content in a website by clicking on the publish ( ) button at the top of the list of items or folders, regardless of what permissions they have in Master Admin.



Top of Navigation Item List, Showing Publish Button

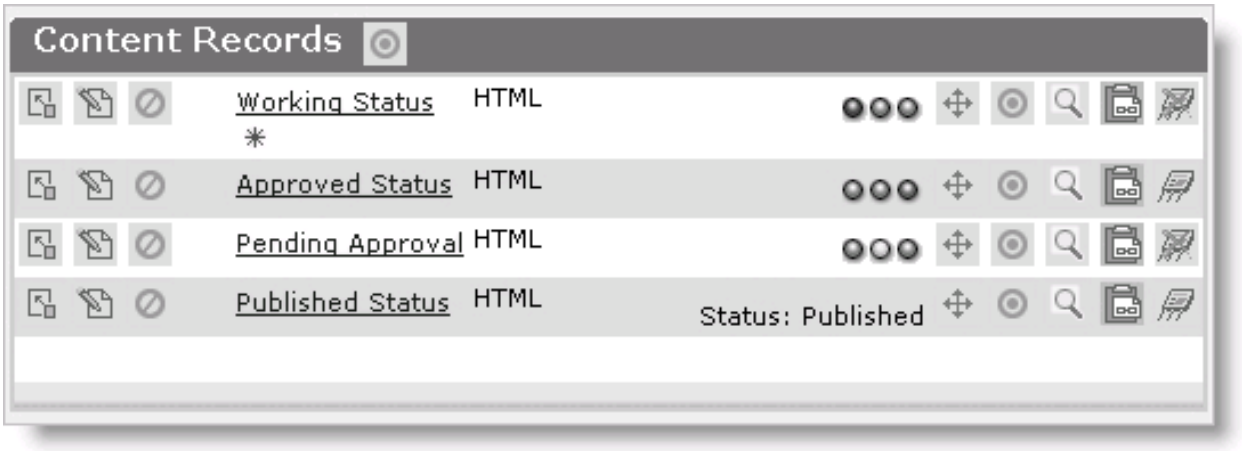
Content Status: Red, Green, and Yellow Lights

An individual content record, whether it is in a navigation item or a content folder can be in one of the following states:

1. Published: Published content has been published at least once and has not been changed in any way since it was last published.
2. Working (red): Working content is indicated by a red light. Working content is currently being edited, but has not yet been approved for publication. Any new content record will always be in the working state when it is first created. Any previously published content will be put in the working state as soon as a user begins the editing process.
3. Pending Approval (yellow): Content pending approval is indicated by yellow light. This means that a content producer without content approver authority has finished creating or editing the content and has requested an approval.
4. Approved (green): Approved content is indicated by a green light. Approved content is ready to be published.

In the Navigation Item Properties Page

Below are four content items as they are listed at the bottom of a navigation item's properties page.

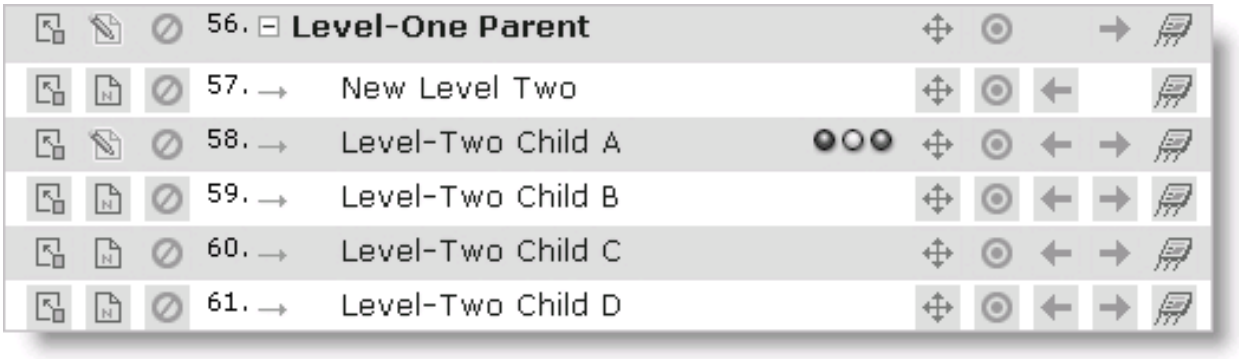


Content in Various States, Navigation Item Properties Page

On the Navigation Items List

Below are the status indicators as they appear on the list of navigation items. Note that all three status indicators appear to the right of the item “Level-Two Child A.” This indicates that there is at least one content record in the item in a working state, at least one record in a pending approval state, and at least one in an approved state.

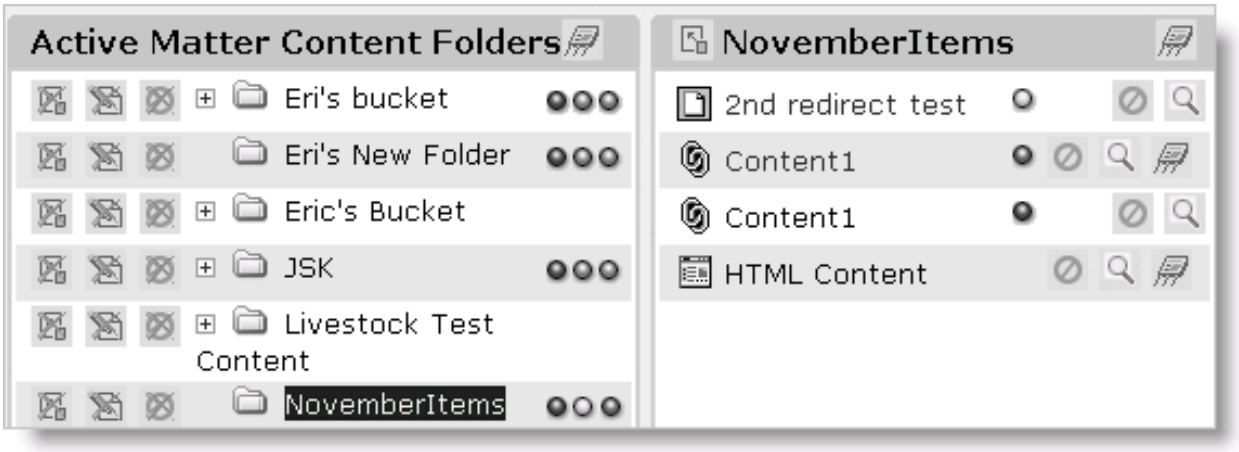
If there is no status indicator to the right of an item in the navigation list, it indicates that the item either contains no content or only content which is in a published state (unchanged since last publication).



Status Indicators on Navigation Item List

In Content Folders

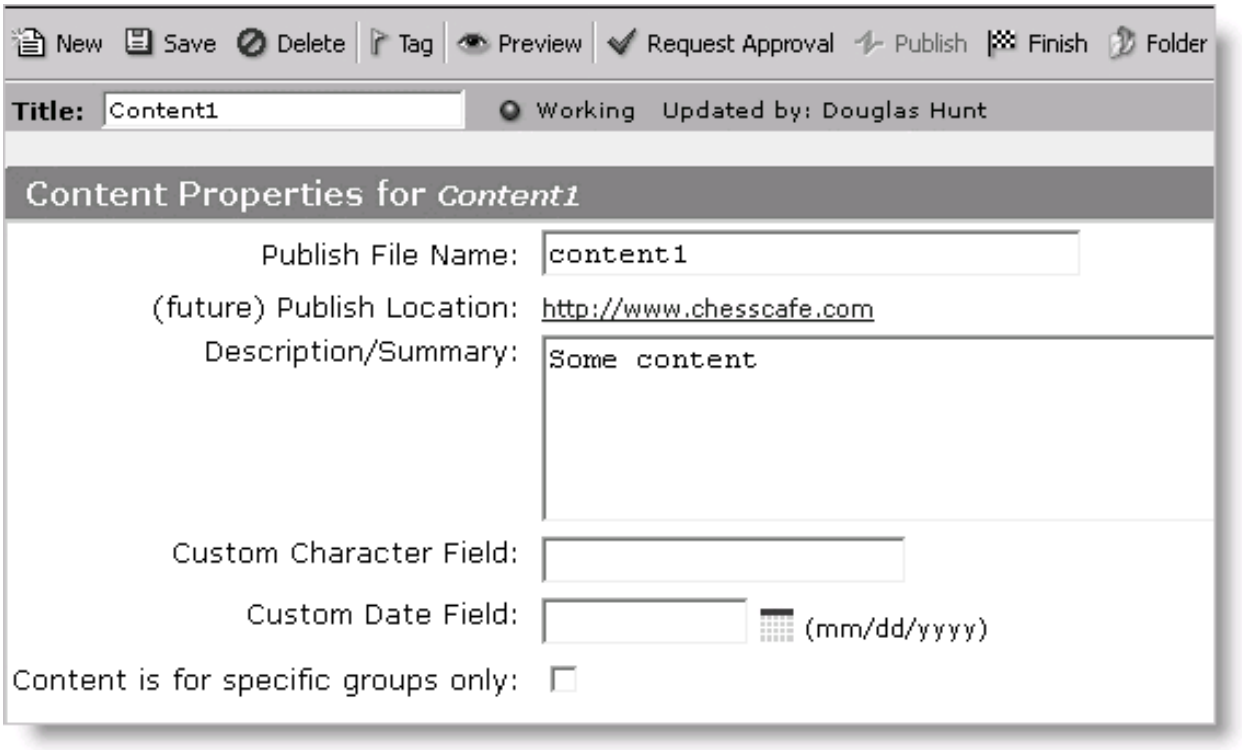
Below are status indicators as they appear in the content folders section of the interface. Note that the selected folder, “November Items,” shows the red, yellow and green indicators, and that its content records, visible on the right, include one record of each status (including published).



Status Indicators in Content Folders

On the Content Producers Toolbar

Below is the working status indicator as it appears on the Content Record version of the content producer's toolbar. In the first case, we are looking at the toolbar on a content record properties page, in the second we are looking at the same toolbar inside a content record's HTML file. The toolbar appears above the toolbar of the WYSIWYG editor.



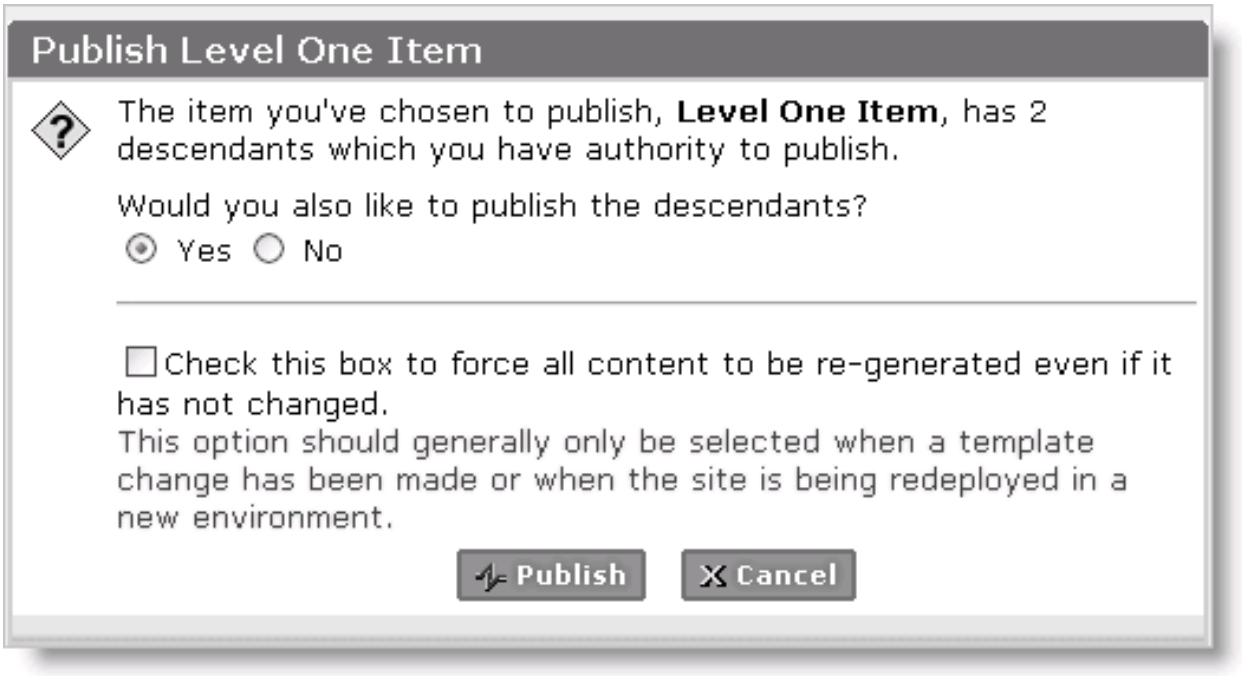
Status Indicator (Working) Content Record Properties Page

To publish navigation items from the navigation list

If a content producer has Nav/Folder editor permission in the group owning an item, they can also publish items from the navigation menu items list, using the publish ( ) button to the extreme right of the item's name.

If you publish an item without children, it will publish every piece of changed (and approved) content in that item's content records.

If you choose to publish an item with children, e-CM will show you a publish option screen. This screen allows you to pick and choose whether content in any of the descendants of your item should be published (children, their children, and so forth).



Publish Option Screen

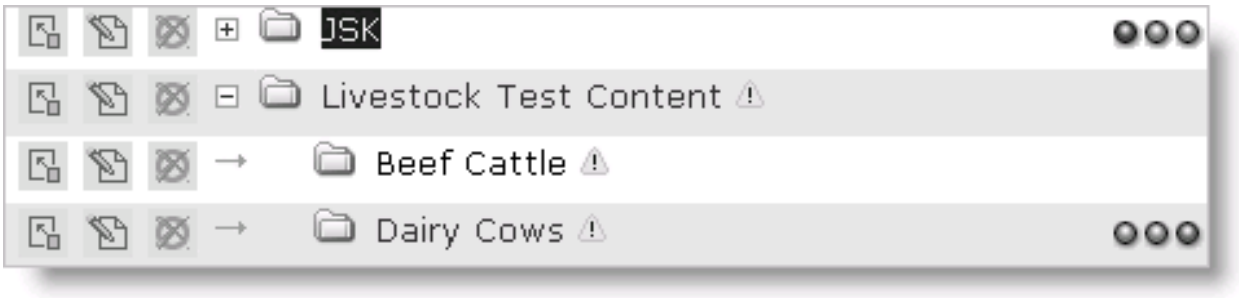
Note that there is an option at the bottom saying Check this box to force all content to be re-generated even if it has not changed. If you do not check this box, only changed and approved (“publishable”) content will be published, which is typically what you will want to happen.

Generally, you do not want to select this option unless you have just installed e-CM in a new hardware environment (for example, installed a new hard disk, or moved e-CM to a different machine. There is usually no reason to publish content that hasn't been changed since the last time it was published, and it doing so uses computer resources, slowing down your site.

Publishing Errors

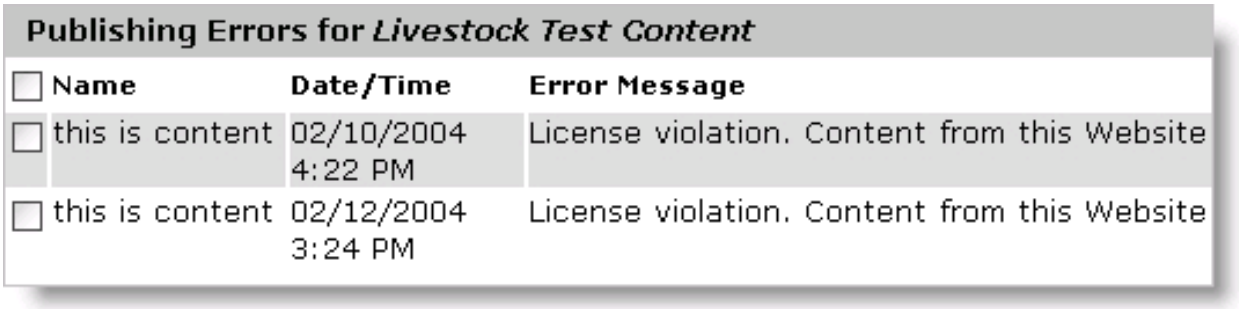
When something happens that stops e-CM from publishing, it will try three times and then report an error back to the user. If the user who publishes leaves the publishing progress window open until the error has been reported back, they will see the error in the window.

Since a busy content producer may well close the publishing window and move on before the error is reported back, e-CM will also put a small warning indicator (⚠) on the navigation item, or content folder list.



Publishing Error Indicators

When a user clicks on the warning indication, they will see an error log for that item or folder in a pop-up form. The publishing server error log files are stored in the C:\Program Files\e-CM5\PublishServiceErrorLog directory. Error log files use a yyyymmdd.txt naming convention.



Item/Folder Log

To clear the error log

1. While viewing the log for an item or folder, check the boxes to the left of the errors you want to remove and click Remove. Checking the box to the left of “Name” on the top line

of the form will check all errors.

2. When you are done, click Close Window.

Creating Content Records

Overview of creating content records

You can add content records to display when the navigation item is selected. The content records will display on the website in the order in which they are shown in the Content Records section of the Properties page.

- Insert a new content record
- Edit content record
- Delete content record
- Move content record below the Target record selected
- Target content below record selected
- Preview content
- Copy link to the content record
- Publish content record

Reviewing Content Properties

The Content Properties page is divided into the following sections:

- Content Producer's Toolbar
- Properties
- Workflow Management

- Current Items
- Current Tags

Toolbar

Advanced toolbar mode for a content record

Simple Toolbar

- New - insert new content
- Save - save content record; changes content to a Working state (red light); icon disabled if the user has chosen to use the Modify icon
- Delete - delete content record; icon disabled if user does not approval rights and if the content state is Approved, Published, or Archived; after deletion the content record is moved to the content folders recycle bin
- Tag - apply tagging categories to content record
- Preview - preview content
- Approve - approve content; changes status of Working (red light) or Pending Approval (yellow light) to Approved (green light, ready to publish); if user does not have approval rights, the Request Approval icon is shown
- Request Approval - change the status of content to Pending Approval (yellow light); if user has approval rights, the Approve icon is shown
- Publish - publish any approved content; icon disabled if user does not approval rights and if the content state is Working or Pending Approval

Intermediate Toolbar

In addition to the Simple toolbar icons, the Intermediate toolbar includes:

- Modify - edit content; changes content in the Pending Approval or Approved state to Working state; icon disabled if content is automatically placed in a Working state
- Revert - revert content to previously published version (content in the Working, Pending Approval, or Approved state is deleted); icon disabled if the user does not have editor rights, if the content is in the Published or Archived state, or if it is first version of the content
- Properties - Navigate to the Content Properties pages
- Editor - Edit the HTML content file
- Finish - Save, approve, and publish content record

Advanced Toolbar

In addition to the Intermediate toolbar icons, the Advanced toolbar includes:

- Copy - Copy the current content record; the Publish File Name is incremented with an integer
- Move - Move the content record to a different navigation menu item or to a content folder
- Versions - open a list of all prior versions

To restrict a user to a toolbar ceiling

On a per-authority group basis, the CM administrator can set a toolbar “ceiling” for each user with respect to content owned by that authority group. For example, if Intermediate is selected, the user can go no higher than the intermediate toolbar when working on content owned by the specific authority group. This effectively restricts access to certain functions.

To create a new content record

1. From the e-CM Admin page, select Website> Site Navigation.
2. Select the navigation item.
3. Select Create in the Content Records section.

Note: If content records exist in the Content Records section, select the Insert icon to insert additional records.

4. Enter the information for the new content record in the Title, Content Properties, Workflow Management, Current Items, and Current Tags sections.
5. In the Current Items section, select Create to create the HTML document.

   Note: If the Ektron WYSIWYG editor was installed, an additional toolbar displays allowing you to edit and format the HTML file.
6. Enter the text.
7. Select the Save icon on the content record toolbar.
8. Select Approve.
9. Select Publish.

Reviewing the HTML section

The HTML document section of the content record properties page contains the name or your file in the middle and several buttons to the left and right.

- The paper-and-pencil icon on the left is the universal “edit” icon in e-CM and will take you back to the WYSIWYG editor.
- The circle-and-slash-icon is e-CM's universal “delete” button (you will always get an “are you sure?” message before e-CM deletes anything).
- The small magnifying glass icon is the universal “preview” icon in e-CM and will show a preview of what your HTML file will look like on the front end.
- The small clipboard icon is a tool to create a link from somewhere else on your site to this HTML file. It copies the text required to make an internal web link to the page to your system clipboard so you can paste it into a link elsewhere. We will return to the whole subject of creating links later. There are so many ways to create links in e-CM that we will devote entire sections to it .

Approving and Publishing Your First Content

We have now created a piece of content! But before we can look at it on the front end of the website, we have to approve and publish it.

At the top of your content record's properties page, you will find the content record version of the toolbar. (This has a lot more buttons than the toolbar in navigation items.)

To approve and publish your content record

1. Click the Approve button.
2. Click the Publish button.
3. A window should pop up showing you the progress of the publishing job. When it indicates that the publishing is finished, look on the website's front end and see if your new page showed up.

Modifying your HTML File

If you followed the instructions in the last chapter, you have a content record with a very simple HTML file in it (a line or two of text).

These are some common things you might want to do to produce a more interesting page.

To find your HTML file

1. Select the name of the Site Navigation item that contains your content record.
2. At the bottom of the navigation item's properties page, select the name of your content record.
3. Select the Edit icon in the “HTML Document” section of the content record's properties page.

Current Items Section, Showing HTML Document

To use WYSIWYG Toolbar

When you enter your HTML file, the toolbar of the WYSIWYG editor will appear beneath the content producer's toolbar. Because it is a logical way to proceed and because the buttons are grouped functionally, we will “march across” the editor's toolbar left to right and top to bottom.

Left to right:

- Cut (cut selected text)
- Copy (copy selected text)
- Paste (paste previously copied text)
- Search
- Print
- Un-do
- Re-do
- Spell-check
- Spell-check as you type.

To add links to your HTML file

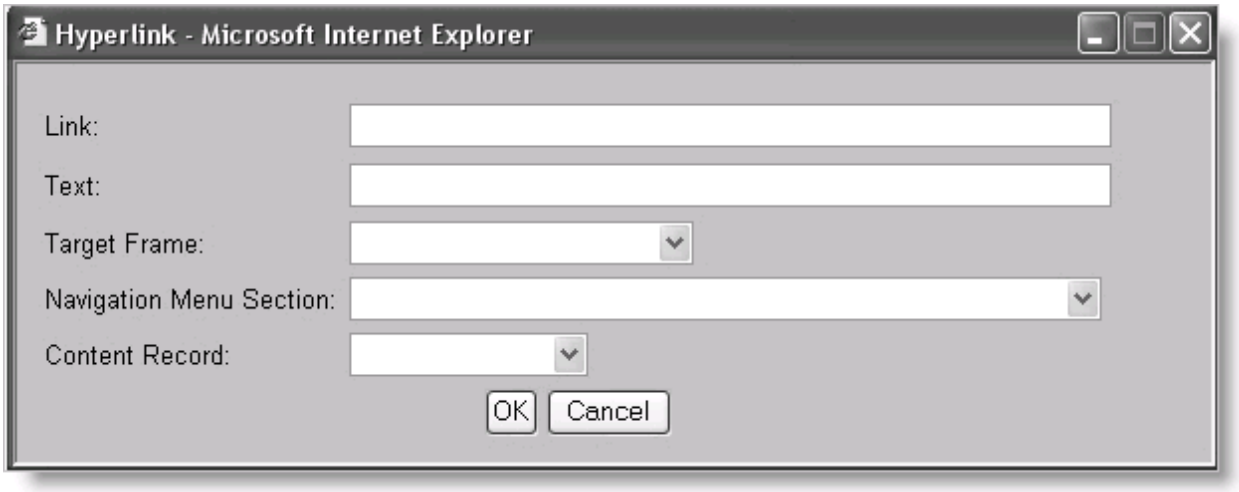
From left to right, the buttons are as follows:

- The blue flag helps you create internal page anchors.
- The globe with the link of chain and starburst creates new links.
- The plain globe and link button is useful for creating mailto: (e-mail) links.
- The globe and link button with the red “X” through the link will delete a selected link (leaving the text behind).

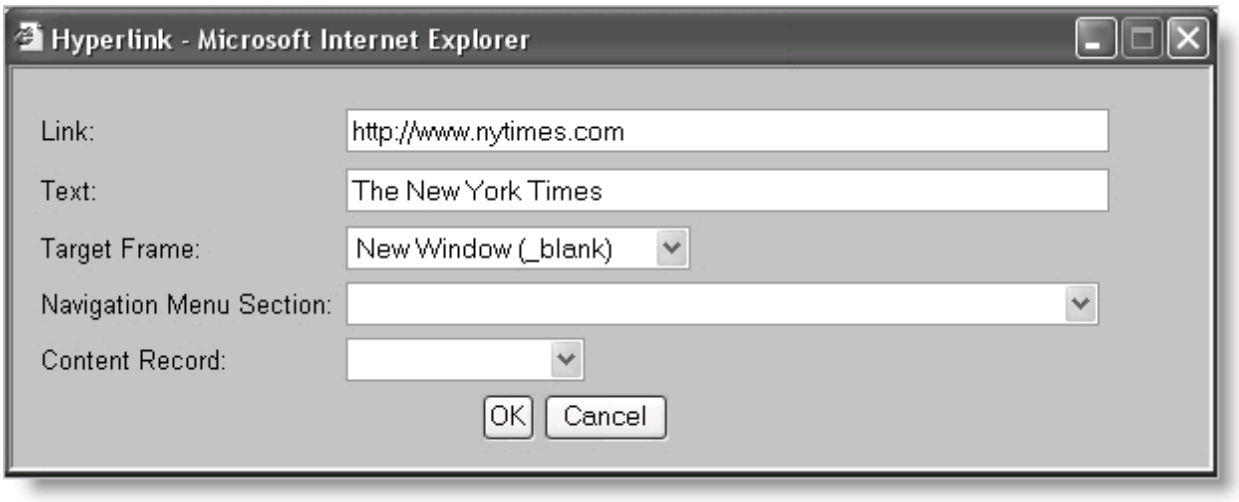
To create an external link (outside your website)

To create a link to an external web page:

1. Go to the HTML file where you wish to insert the link.
2. Select New Hyperlink at the top bar of the WYSIWYG editor.”
3. In the Link field, type the full URL starting with http://s-g.biz.yahoo.com/051110/15/3wdkg.html.
4. In the Text field, type the text you want the user to see when they see the link on the page.
5. Click OK and your link will be inserted in your HTML file.



WYSIWYG Link Window



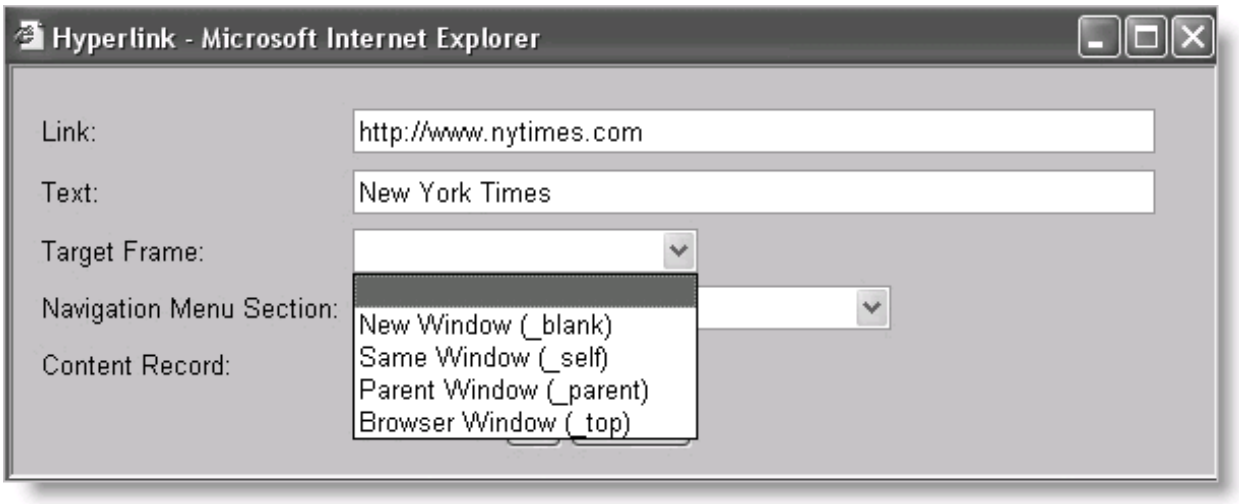
Link to External Site

To choose a target for your link

One other choice you can make when creating a link is where the user goes when they select the link. By default, links on web pages are targeted at the same window - meaning that when a user selects a link, they leave the current page and go to the page specified in the link. You can also make your links target a new window, meaning that the user will still have the original page open, and will see the page specified in the link open up in a new window.

As a starting point, many organizations decide that all external links (links to a page on another website) should be targeted at a new window so the organization's website will still be available to the user. In most cases, it does not make sense to make an internal link (a link to another page on your own site) open a new window, since the user would end up with multiple copies of your website open.

- Same Window (_self) - displays the linked file in the same browser window
- New Window (_blank) - displays the link file in a new window
- Parent Window (_parent) and Browser Window (_top) - relate to sites with frames



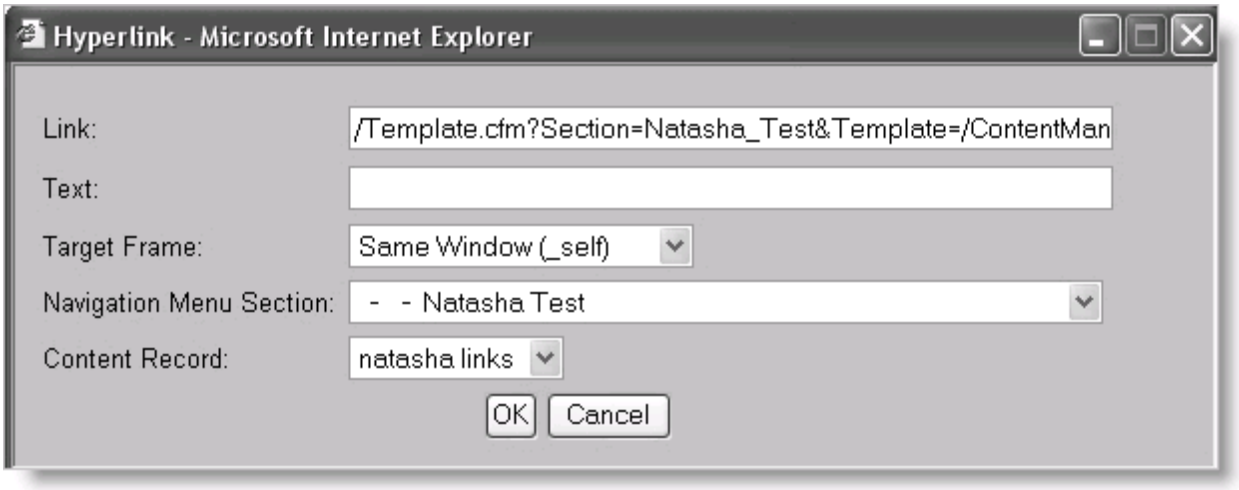
Target Frame Options

To make a link open in a new window

1. Fill in a link and text as described elsewhere in this section.
2. Select New Window (_blank) from the Target Frame drop-down list.
3. Click OK.

To create an internal Link (to another place on your Website)

Another thing you can do with the WYSIWYG editor is to create a link to a specific item navigation menu (and even to a specific content record in that item).



Link to a Content Record

To create an internal link:

1. Go to the HTML file where you wish to insert the link.
2. Select the New Hyperlink icon on the top bar of the WYSIWYG editor.
3. Select the Navigation Menu Section drop-down list and select the navigation menu item (button or link) you want the user to see.
4. After you select an item, a drop-down list of the content records in the selected item will appear below. If you wish to specify a particular content record you want the user to see (for example, if there are multiple content records in the navigation item), select the Content Record drop-down list to select it. If you do not specify a specific content record, a user who follows your link will see the same content they would have seen if they had clicked on the selected navigation item.
5. In the Text field, enter the text you want the user to see when they see the link on the page.
6. Click OK.
7. Click Save and close the editor.
8. Select the Preview icon next to the content record.

Any navigation item, which appears with a gray background in the Navigation Menu Section drop-down list, is a level-one item.

Note: The functionality shown above (the Navigation Menu and Content Record drop-down lists) only appears when you are creating new links, not editing existing ones. For this reason, if you need to edit an existing internal link, it is sometimes easier to use the Remove Link icon (the one with the red “x” through the link symbol). The Remove Link icon removes only your link, not the text. To re-insert a new link, select the text and select the New Hyperlink icon again.

To add images to your HTML

The images icon is the second from the left:

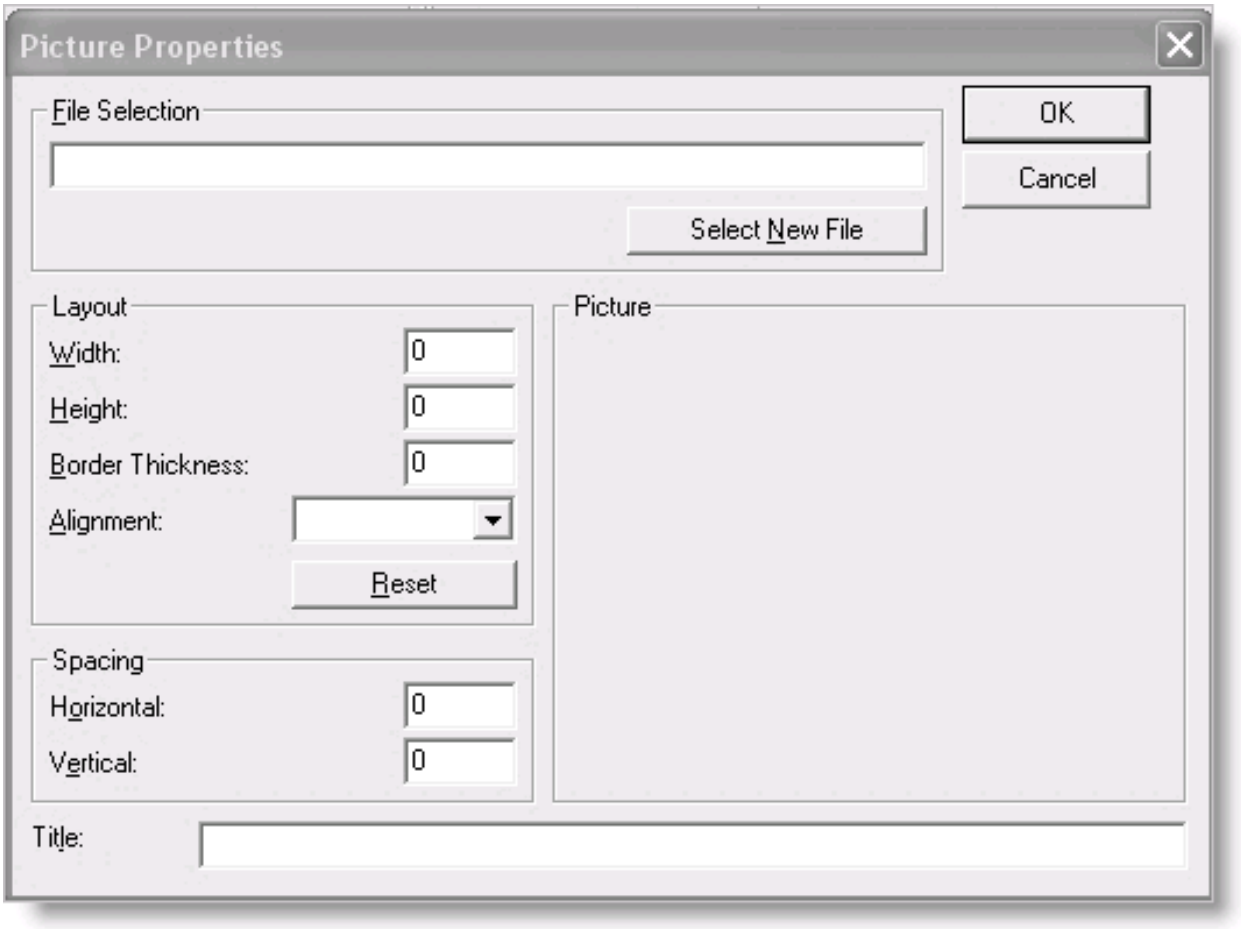
- The button with a horizontal line adds a horizontal rule (the <hr> tag) to your page.
- The button with the mountain sunrise is the image button.
- The button with the tabular design and the downward pointing arrow allows you to insert tables.
- The button with four little boxes turns table borders on and off (making HTML tables visible and invisible inside the WYSIWYG editor).
- The plain right arrow makes paragraph marks visible, and works much like the similar option in word processing programs.
- The two buttons on the far right switch the view between WYSIWYG and the actual HTML.

  There are two good reasons to look at the actual HTML: it's a good way to learn a little HTML if you don't know any, and it can sometimes be useful to fix little problems - for example, to remove an extra set of paragraph tags ( ) which are adding a vertical line to your page.

1. Open your HTML file in the WYSIWYG editor and position the cursor where you would like to insert the image.
2. Select the Image icon. This will open editor's Picture Properties form.
3. Click the Select New File Button and you will see the Image Manager window.
4. Click Browse to navigate to the location of the image you wish to insert on your local machine or network.
5. Select or double-click the image.

   Note: Make sure the image file name does not contain spaces. If the name contains spaces, rename the file and remove the spaces.

6. Click Upload Image. After a brief pause, a preview of the image will display.
7. Click OK to insert the image.
8. Click OK to return to the editor's Picture Properties form.
9. Click OK to insert your image.



Ektron Picture Properties Form

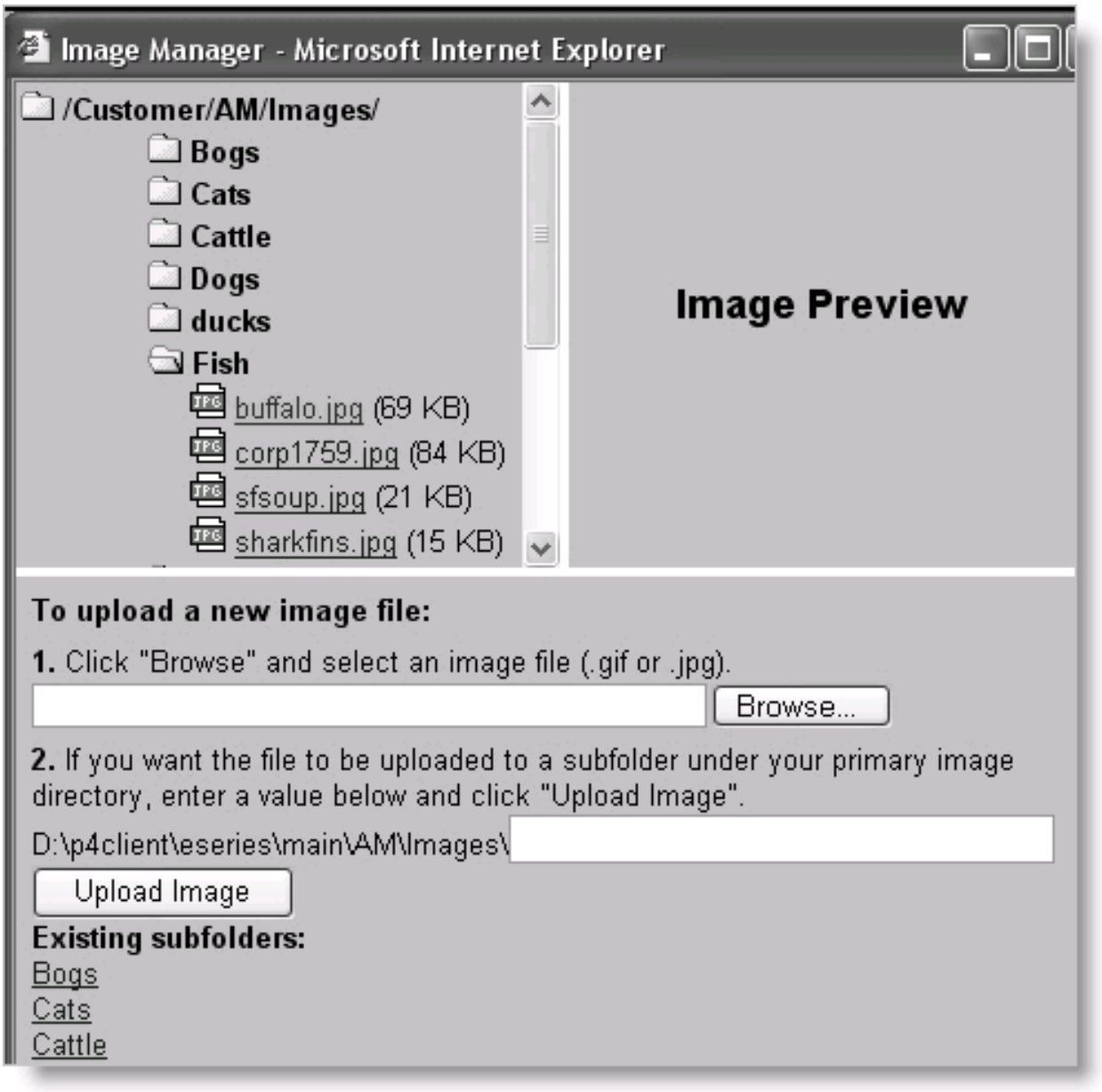


Image Manager Window

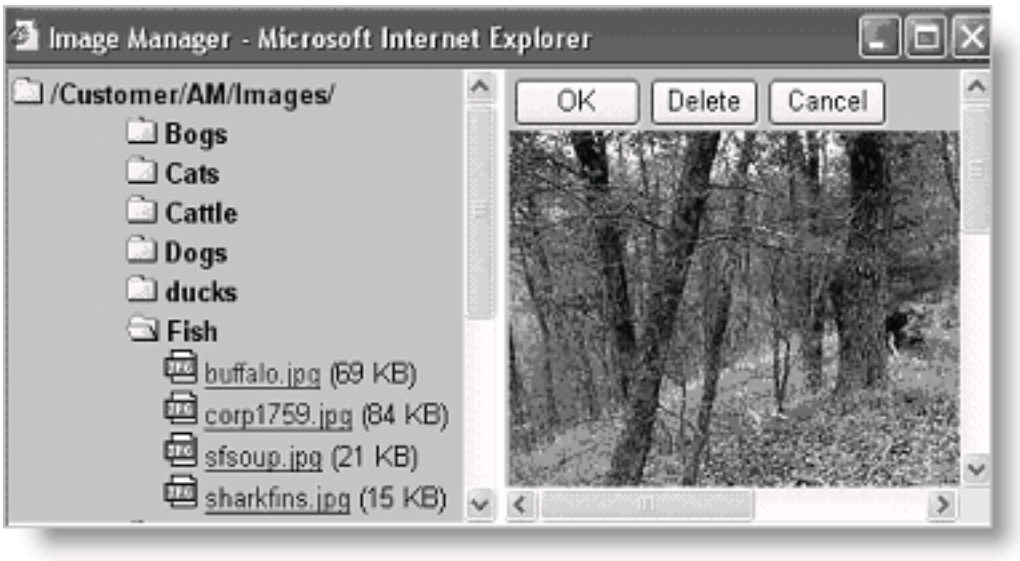


Image Ready for Insertion

To create a numbered list and align text

The following icons control lists and alignment.

- Set preferences for display of HTML in non-WYSIWYG mode) grayed out unless you are viewing HTML.
- Create a numbered list.
- Create a bulleted list.
- Out dent selected text.
- Indent selected text.
- Align selected text left (the default).
- Align selected text center.
- Align selected text right.

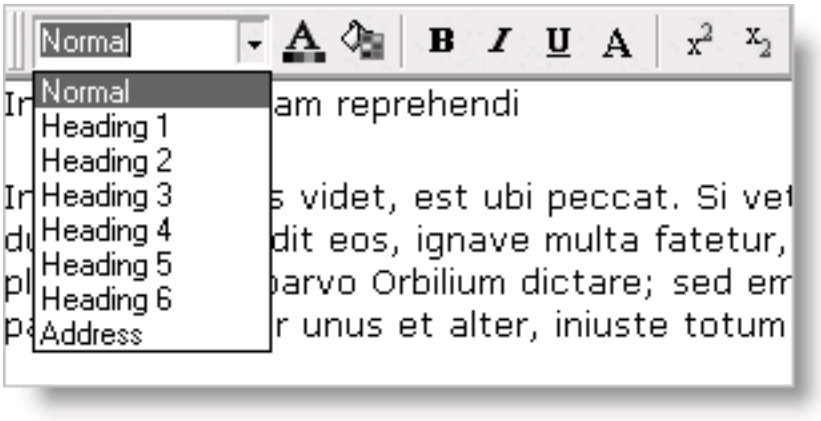
- Justify selected text.
- Displays Ektron editor version.

These buttons work as any user of a word processing program would expect.

To use heading styles

The drop-down list allows you to change selected text to one of eight styles, all determined by your site's cascading style sheet: normal paragraph font (the default), Heading 1 through Heading 6, and a style called Address, which is usually set to a monospace (all characters the same width) font. To use it, select your text, and then select the style you wish to apply.

Note: If you want to change the appearance of any of the styles, you will have to ask your webmaster to edit the style sheet for your site. Any changes made will apply to all pages on your site.

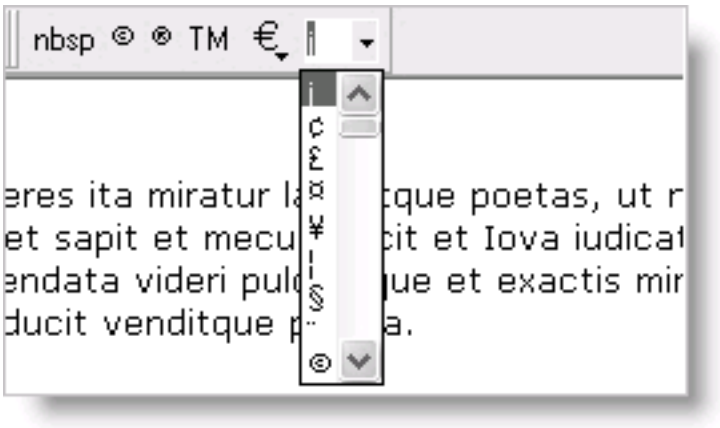


The other icons do the following:

- Allow you to create colored text.
- Allow you to create colored backgrounds.
- Create bold text.
- Create italicized text.
- Create underlined text (do not use, users will think it's a link).

- Re-set all styles (bold, italic, etc.) to normal.
- Create superscript text (above the line).
- Create subscript text (below the line).

To insert special characters



To save you the trouble of looking up the “HTML entities” which are used to display special characters in HTML, the editor includes the buttons and drop-down lists. The four buttons insert a non-breaking space, the copyright symbol, the registered trademark symbol and the “™” symbol. The two drop-down lists include many non-English letters with accents and other useful symbols (organized in a rather random matter).

To access other options (right-click)

When you are working in the WYSIWYG editor, you can right-click to see contextual menus that will give you various options related to your entire document and the particular element you may have selected.

Learning More About HTML

If you are using the Ektron WYSIWYG editor, most HTML will be generated for you. However, you will occasionally have to go in and look at the actual HTML (using the little < > button on Ektron's toolbar) to fix things. The two tables below will give you an idea of what you are looking at.

HTML Tags

This is an XML-style break tag. If you use a <br />, it will create a break in your text, as if you had pressed Enter. If you want to break and skip a line, put in two tags one after the other.

this is my important text

Strong tags get wrapped around text that you want to appear in bold. Use where you want the bold to start and a where you want the bold to end. You can also use and for the same purpose, but the tag is not handled as well by web page readers used by those with impaired vision.

this is my little note to the reader

 tags (short for “emphasis”) get wrapped around text you want to see in italics. The italics will start after the and stop at the tag. You can also use the and tags for the same purpose, but is better supported by web page readers used by the disabled.

this will be in bold italics

You can combine the and tags to produce text in bold italics. It doesn't matter if you put the tags on the outside and the tags on the inside or the other way around.

HTML Elements

Link to the NY Times

This is the basic syntax for a web link. The target attribute determines where the link will go (_blank will open a new page, _self will load the link in the same page, and _top will load the link in the same browser window even if there are multiple “frames” in the browser window.

<img src=”/Images/myPicture.gif”>

This is the basic syntax of a link to an image. These links are created for you when you use the Image icon.

<A HREF="mailto:name@company.com">
send email</A>

This is the basic syntax for an e-mail link.

You can also do things like this:

<A HREF-
="mailto-
o:joe@acme.com?cc=bob@acme.com&subject=The%20Readme%20File">Super
Email Link</A>

This will pre-populate a CC and a Subject in most e-mail clients. Notice that the spaces in the subject line have been replaced with “%20”, that there's a "?" after the main e-mail address, and that the other two elements are separated by an “&”.

Adding Links and Files to Content Records

We have now created a navigation item with only one content record. That content record contains only an HTML file. We will now add links and files to our content record.

The following types of content can be put in a content record:

- HTML: Only one HTML file is allowed per content record.
- Links: A content record can contain any number of links. These can include both “internal” links to web pages inside your site or “external” links to other websites.
- Files: Files such as PDFs or Word documents may be uploaded to a content record. You can upload as many files as you want.
- Tagged Pages: Tagged pages are a special case that we will talk about later. Tagged pages must be by themselves in their own content record.

If you add links or uploaded files to your content record, they will appear underneath standard headings below the HTML file. The default headings are Related Files for uploaded files and Related Links.

Links and Files in a Content Record

To navigate back to your content record

If you are not at your content record, your first challenge is to find your way back to it:

1. In the Site Navigation list, find your navigation item.
2. Select the navigation item to go to the navigation item properties page.
3. At the bottom of the page, select the link to your content record's properties page.

Link to Content Record

To add a link to a content record

To add the first link to a content record:

1. Open the content record properties page and scroll down to the Links section.
2. Type the full URL in the top text box (starting with http://).
3. Type whatever text you wish to display on the link on the bottom.
4. Click Save.
5. Select the Preview icon on the toolbar to see where the link will appear on the front end (they will appear under a standard heading beneath the HTML file).
6. Select the Preview icon to the right of the link to make sure it works.

   Note: Because it is so easy to make small typos in links, you should make a habit of always previewing newly added links before you approve and publish your content records.

Link Editing Interface

Link after Clicking Save

Additional links

e-CM will hold an editing form open until you save your first link. After you have a link, use the insert icon to enter another link. Using the insert button to the left of an existing link will always insert the new link below it.

Content Record after Adding First Link

To enter a second link:

1. Select the Insert icon next to your first link.
2. Fill out the form as before (URL above, link text below).
3. Click Save.

4. Select the Preview icon to the right of the link to make sure it works.

   Enter at least three or four more links so you will have enough to practice moving links.

   To edit links

   To edit a link:

1. Select the Edit icon to the left of the link.
2. When the form opens, populated with the URL and Link Name (text), make your changes.
3. Click Save to save your changes (the form will close again).

   To delete links

   To delete a link:

1. Select the Delete icon to the left of the link you want to delete.
2. Click OK to the confirmation message.

   To upload a file to a content record

   The process for uploading a file is much like doing an e-mail attachment.

1. From the Content Record Properties page, click Browse to locate the file.
2. Select or double-click the file.
3. Enter the description you to appear on the link.
4. Click Save.
5. Select the Preview icon.

   Note: Make sure the image file name does not contain spaces. If the name contains spaces, rename the file and remove the spaces.

Browse for a file to upload

As with link, e-CM will hold open the file form until you have uploaded your first file. Use the Insert icon to the left of an existing file to insert a new file in the list. The new file will be inserted below the file whose insert button you have clicked.

Editing files

To edit a file, select Edit icon to the right of the file's name. This will open up the form and insert the description, but it will leave the Browse button open.

Whatever you change will be changed after you click Save, and whatever you do not change will be left alone.

In other words:

- If you click Save after changing the name, only the file name will change.
- If you click Save after uploading a new file, you will have a new file, but the old name.
- If you change both the name and the file, you will have a new file and a new name.

To delete files

To delete a file:

1. Select the Delete icon to the left of the file you want to delete.
2. Click OK to the confirmation message.

To sort (move) files and links

Links and files will be shown on the front end in the same order that they are shown on the back end. If you want to change the order on the front end, move the links or files on the back-end and then republish the content record.

To move a link or file:

1. Select the Move ( ) icon to the right of the link or file you want to move.
2. Select the target ( ) icon to the right of the link or file you want to move it below.

Note: If you want to make a link or file the first one in the list, you will have to make it second by clicking the target next to the top link, then use move and target again to move the top link down to second position.

To tag your content

If you wish to tag your new content, you use the Tag icon in the content producers' toolbar or at the top of the Current Tags section at the lower-right corner of the properties page.

To tag your content record:

1. Select the Tag icon.
2. When the pop-up list of tags appears, check your selections, clicking on the “+” images or “Expand All” if necessary to show the tag(s) you want to use.
3. Click the Save and Close button at the bottom of the pop-up window.
4. The tags you have selected will now appear in the Current Tags section of the properties page. The selected tags will appear in bold; their parents, if any, will appear in regular type.

Current Tags Section of Properties Page

Publishing your new content

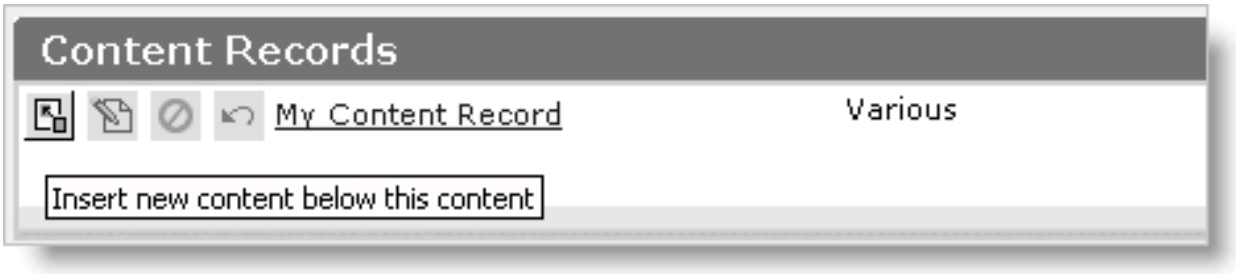
If you have been working through the instructions in this section, you should now have a content record with HTML, files, and links. To view your content record, select the Pre-view icon on the toolbar at the top of the page.

If you would like to publish the content record, click on the publish button on the toolbar at the top of the content record page (if you have publishing authority, this will both approve and publish your content).

To add multiple content records to a navigation item

With the exception of a tagged page, you have now added every type of content you can to your content record. The next step is to see what choices we have when we add two (or more) content records to one Navigation Item.

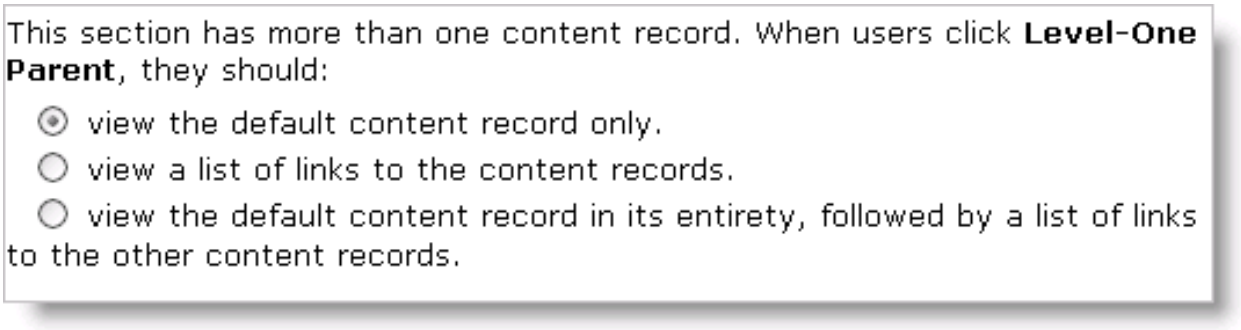
1. In the same navigation item where you inserted your first content record, go to the content records section at the bottom of the properties page.
2. Select the Insert icon to the left of your first content record to open the content record properties page for your new content record.
3. Insert an HTML file in your new content record.
4. From the properties page of your new content record, select the Navigation icon on the toolbar to go back to the properties page of the navigation item.



Getting Ready to Insert New Content Record

Reviewing Content Record Display Options

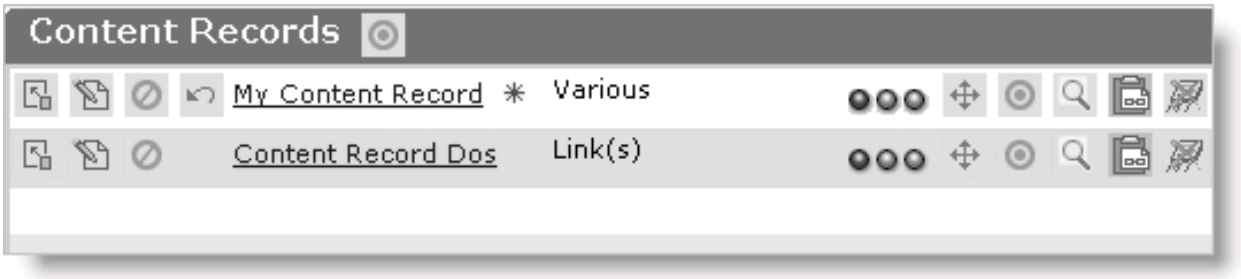
In the properties section of the page, you will see the following display options whenever a navigation item contains more than one record:



Navigation Item Settings for Multiple Content Records

The Default Content Record

The default content record is simply the first content record in the list at the bottom of the navigation item properties page. As soon as you have more than one content record in a navigation item, a red asterisk is used to mark the default record.



Default Content Record, Marked by Asterisk

To change the default record you simply move a new record into the first position in the list. If you have only two records:

1. Select the Move icon to the right of the first record.
2. Select the Target icon to the right of the second record.

   This will move the first record down below the second record (records are always moved into the slot after the target button).

If you have more than two records, you can change the default by making it #2, then moving the default record below it:

1. Select the Move icon to the right of the first record you want to make the default.
2. Select the Target icon to the right of the current default record. This will move the record into the second slot.
3. Select the Move icon to the right of the current default record and the target button next to the record you moved. This will move the default below it, and make your record the new default.

Note: After changing the default record or any of the display options, make sure you re-publish the navigation item to make your changes live.

Setting the display options

The content record display options are reasonably self-explanatory:

Default Only

If you choose the show default record only option, only the default record will be visible. All other records in the navigation item will be hidden (although still available via site search or tagged pages).

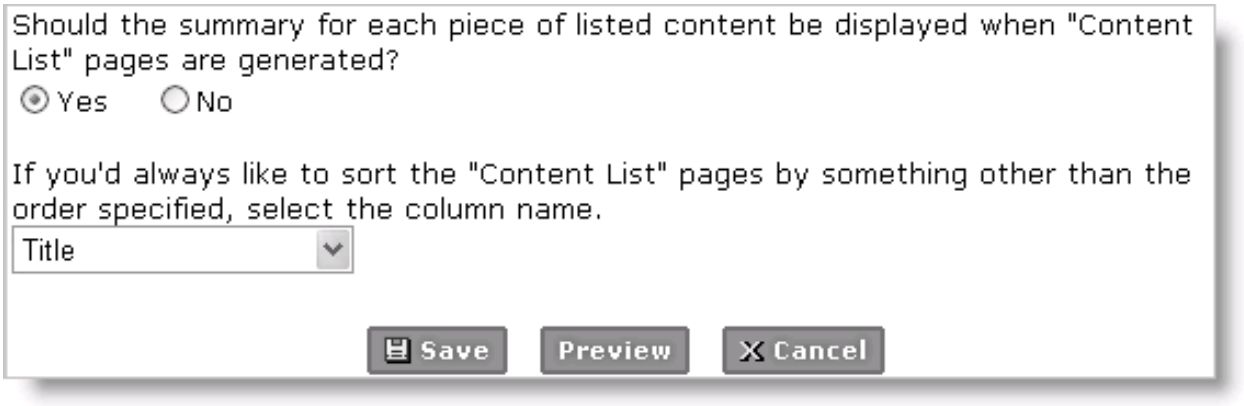
Content List (“Show a List of Links”)

If you choose the content list option, the user will see a list of links to the content records. If there are any descriptions entered for the content records, these will be shown (by default) below the links. Whether descriptions will be displayed with this option enabled can be specified on a per-website basis on the website properties form. You may also choose to arrange the links by something other than the order of the list in the navigation properties form.

Combo (Default plus Links)

If you choose the third option, the “Combo” mode, the default record will be displayed in its entirety, followed by a list of links to other content records. You can also choose

whether to display content record descriptions beneath these links. The setting is found in the website properties form.



Content List Settings, Website Properties Form

Reviewing default content record properties

Empty navigation items with children

If any navigation item with child items is empty (no content records), the user will automatically be taken to the first child item and will see exactly what they would see if they clicked on the child link directly. If the first child is empty, they will see the standard “this page is temporarily unavailable” message unless the first child of the child has content, in which case they will see the content of the “grandchild” page.

Note that while e-CM will keep recursively looking through multiple levels of first children (although we can't imagine why you would ever want to go beyond one level); it will not look in the second child if the first child does not contain content.

One Content Record with Only a Link

If a navigation item contains only a single content record and the content record contains only a link, when a user clicks on the item, they will simply go to the URL (either internal or external) specified by the link. If the “open in new window” option is checked in the content record, clicking on the navigation item will launch the URL in a new window.

One way to use this feature is to create internal links. For example, if you would like to create a link to your online store in several sections of your website, you can simply create a navigation item with one content record containing only a link to the store and title the

navigation item “Online Store.” When a user clicks on the link, they will be automatically taken to the online store.

A Content Record with Only a File

Content records with only an uploaded file behave a little differently from normal content records.

If such a content record is the only content record in a navigation item, selecting the link will display the file in a new browser window.

If the content record is not the only record in a navigation item and is not the default record, any links built to it by e-CM in list or combo modes will open in a new window.

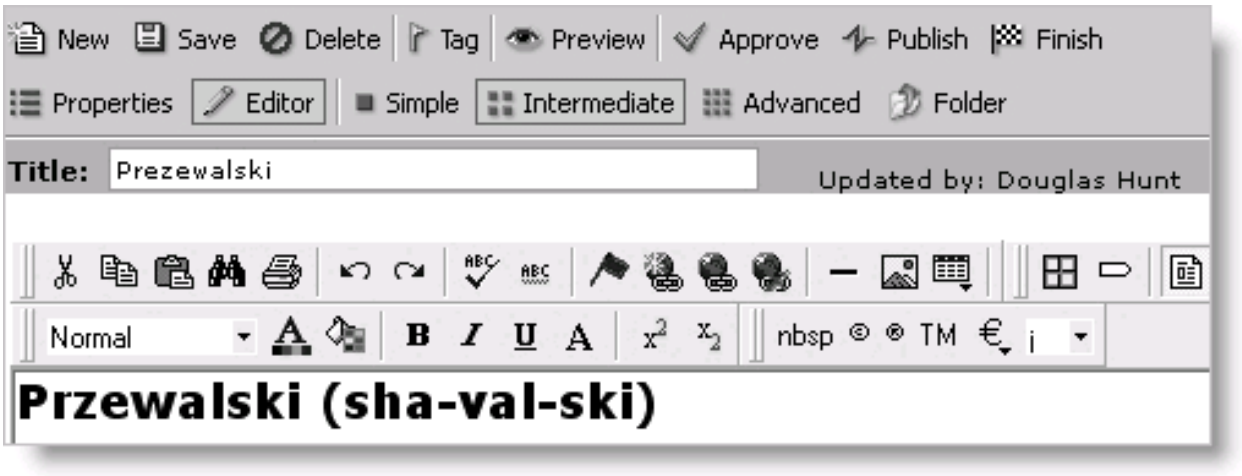
If the content record is the default record for a navigation item and there are other content records, it will either:

- Ignore the other records and open up in a new window (if the content record display options are set to “combo” mode) or
- Open the list of content records in a new window (if options are set to display a list of content records). You generally would not want to make a content record containing only a file the default record in a navigation item with multiple content records.

Reviewing Content Record Properties Page Settings

Now that we've entered our first piece of content, we've already been playing around with the content record properties page, but let's take a closer look at the settings at the top of the page, which control many things about how your content is displayed on the front end.

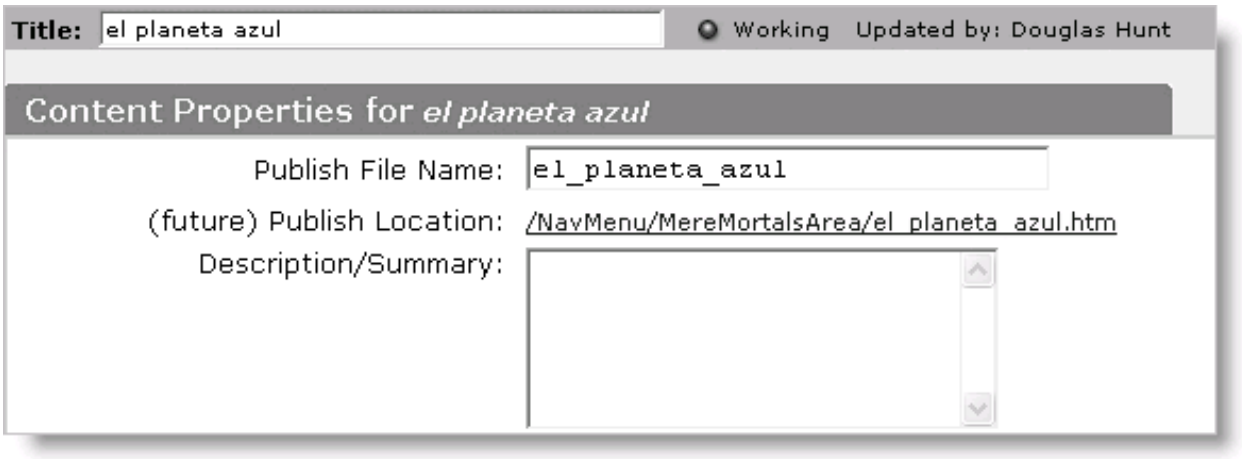
Note: If you have your preferences set-up to always take you directly to the WYSIWYG editor rather than to the content record properties page, you can always get to the properties page by selecting the Properties icon in the left-hand side of the content producers toolbar. This icon is available in the intermediate and advanced versions of the toolbar.



Content Producers Toolbar Showing Properties Button

Content Record Properties Window

There are a fairly large number of settings in the properties section of the content record properties page. As is the case with the settings for Navigation Items, most of them can be left at their default settings most of the time.



Top of Content Record Properties Form

Title

This is the name that will be used for any links that point to this record if it is retrieved by a tagged page, or if there is more than one content record in a navigation item (we'll get to that). The title will also be indexed and displayed by your internal site search engine and

by commercial search engines. The most important thing to remember is that it should be a name you want users to see, not just a name for your own reference. Ideally, it should be brief and should meaningfully describe the content.

Publish File Name

This is the name of the file that will be published from the content in this record (with ".htm" on the end). By default, it will be the title with any special characters removed and all spaces replaced by "_" characters. You can change it if, for whatever reason, you wish the published file to have a different title.

(Future) Publish Location

The (future) publish location is an absolute path link to the location where the content record will be published. In other words, this is where e-CM will put the files when it publishes this content record (the "future" is there to remind you that if you haven't yet published the content, it will not be there yet). You can use it to create a link to this content record. The publish location is determined by the system and cannot be changed by the user.

Description/Summary

The important thing to remember about the description field is that what you type here will be seen by website visitors and will also be used by search engines (both internal and external). It should be a brief but meaningful description of what the record contains. It is not essential to include a description (especially if the name of the content record makes what it contains extremely obvious), but it is usually a good idea.

Here are the details on where this description will appear to front end web users:

- The description will appear beneath any links to the record if you have more than one content record in a navigation item and choose to display a link rather than the full record.
- In addition, the description will show up in the meta section of the HTML page generated from this content record. Without going too far into the technical details, that means that if your site search or an external search engine pulls up the page generated from this content record, what you enter here will be displayed as the page's description.

- If you want the technical details, entering a description will generate a meta tag with a name “description” and the description will be in the content attribute of that tag.
- Tagged pages can also be constructed so they show a content record description (this is only relevant if your site includes tagged pages).
- Again, if this seems like a little too much information to absorb right now, the most important thing to keep in mind is that the description will be seen by website visitors in a variety of circumstances so it is probably a good idea to enter something useful in this field.

  User-Defined Fields

  Following are two examples of user-defined fields. If you have custom fields activated, they will appear directly below Description/Summary. These fields are used with tagged pages and/or search and allow you to enter and then display (on tagged pages) information, which is not part of e-CM's standard data. For example, if you have a large collection of articles and want to display an author name (and/or sort by author) in a tagged page, you could enable a custom character field called Author Name.

  Since the name and purpose of user-defined will vary, if you are unsure how to use them, you should ask your supervisor or webmaster.

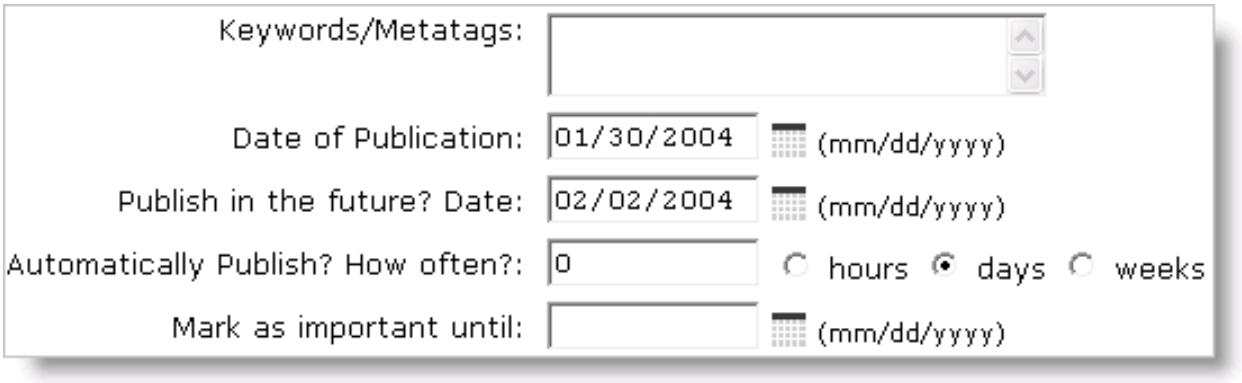
  Example Custom Fields

  Keywords

  If you enter keywords for your content, they will not appear on the front end. They are used by your site's internal search engine to find content. There are two reasons for using keywords.

  The first case is if you have a document that does not contain a specific word or phrase that a user might use to search. For example, if you have a document that is about tax

policy, but does not actually contain the phrase “tax policy,” you could enter “tax policy” as a keyword.



Content Record Properties Page Detail

The second reason you might want to use keywords is to change the position of a document when a user searches on a particular word or phrase. The Verity™ search engine used with e-CM is smart enough not to fall for the old trick of repeating a keyword many times, but a document with “tax policy” in the keywords and in the description and in the body of the document will rank higher than one where it occurs only in the document (exact details will vary depending on the way your site search settings are configured).

If you want to use keywords to ensure that certain documents always rank at or near the top of the list when a user searches on a given keyword, you should use them sparingly. For example, if you want one document to be #1 when “tax policy” is searched on, you would not want to enter it as a keyword for every document on the site relating to tax policy or the advantage of having the keyword would cancel out.

External search engines (such as Google) will ignore your keywords.

If you want the technical details, entering keywords will generate a meta tag with the name “keywords” and whatever you enter in keywords will be the content of that tag.

The description and keywords properties both generate “meta tags” which are used by search engines to classify pages. The subject of meta tags and search engines is extremely complex and has spawned its own industry of consultants, but Search Engine

Watch (http://searchenginewatch.com/webmasters/meta.html) includes a brief and opinionated description of the description and keywords meta tags.

One thing to keep in mind is that while, as the link above points out, no major external search engines (e.g. Google) use keywords meta tags, your site's internal Verity™ search engine does use them, so keywords are an effective way to ensure that a page is retrieved by your site search.

Date of Publication

The Date of Publication field gives you the ability to associate a fixed date of your choice with a particular content record - a date that will not depend, for example, on when the record was last published or when it was first entered into e-CM.

If you are using advanced site search, the Date of Publication field is extremely important - this is the date search results will be sorted by when the user chooses to sort by date. The field can also be used to sort records and/or display a fixed date in tagged pages (for example, if you have a series of dated press releases).

Format should be mm/dd/yyyy (if you are using tagged pages, you will be able to change the way the date is displayed when you set up your tagged pages). You can use the small calendar icon to the right of any date field to populate the date in the proper format.

Publish in the Future?

If you enter an mm/dd/yyyy date in “Publish in the Future?” the content in the record will be published overnight by a scheduled task at the date you choose. This is a good way to create content now and have it appear for users at an appropriate date in the future.

This feature can also be used to embargo content until a specified date. Once you set a content record to publish in the future, e-CM will ignore any attempts to publish it “by hand.” If you insert a date in this field, the assumption is that you want it to “go live” on the specified date in the future and not before. If you later change your mind and want to publish the record manually, simply remove the date, click on the Save button to save the change, and then publish the record in the normal way.

Note: If you use this feature, remember that your content must still be approved.

Automatically Publish

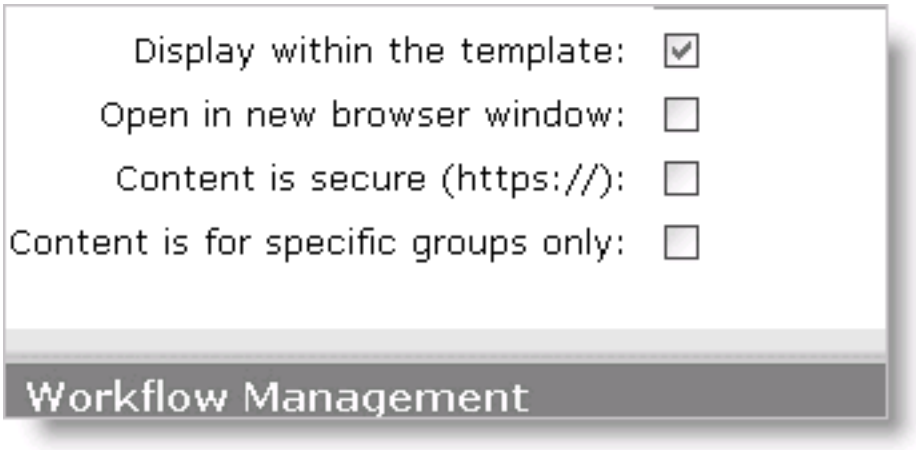
If you enter an integer n in this field, it will automatically republish the content record (via a scheduled task) every n days. If you leave it at the default, zero, the content record will not automatically be republished.

Mark as Important Until (New Image)

If you enter a date here, e-CM will display a “new” icon next to any links to the record in a tagged page until the date specified is reached. The feature does not relate to whether the content is important.

Display within the Template

The template is the standard ColdFusion page, which is designed to surround all the content records in your site. In plain language, it includes your site's navigation and your buttons and associated graphics. If you un-check “Display within the Template,” the content in the content record will be displayed without any of the typical navigation and design elements in your “normal” pages.



Content Record Properties Page Detail

You may want to un-check the box, for example, if your content record displays a “print and mail” form or a letter from a board member or any other content in which standard navigation and design elements would be inappropriate.

You do not need to worry about this setting with respect to files or links. If, for example, you create a link to the New York Times website, e-CM will not try to display that site inside your template. Also, if the content record contains only a single file (for example, a jpg or a pdf) the navigation link will not attempt to display it within the template.

Open in New Browser Window

By default, navigation links to content records will open in the same browser window. If you check this box, the content record will cause the record open in a new browser window.

Content is Secure (https://)

If you check this box, any content in the record will be encrypted before it is sent over the web (assuming your site is properly set up with a secure certificate). This would be appropriate, for example, for a page containing highly confidential business information (which you would presumably also want to protect by restricting access to specific groups of members).

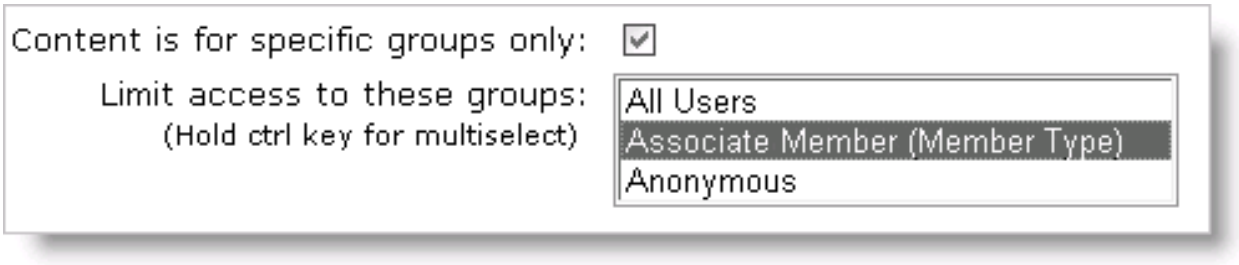
Content is for Specific Groups Only (Members Only)

If you check this box, access to the content record will be restricted to your members, who will have to login to the site before they can view it (if they click on a link to it before logging in, they will be prompted to login). If your site features integration with your membership database, checking this box will cause a multi-select box to appear, allowing you to select which membership types may see the content.

The list of member types will typically come from your back-end member database. The special type “All Users” is generally included. Selecting “All Users” will require users to be logged in to view a page, but will not require them to belong to any specific membership category.

If a user tries to access members-only content when not logged in, they will be prompted to login. If, during login, they are determined to belong to an appropriate type, they will be shown the content. If not they will be shown another message thanking them for logging

in, but telling them that they do not have the right to access the content. These messages are configurable.

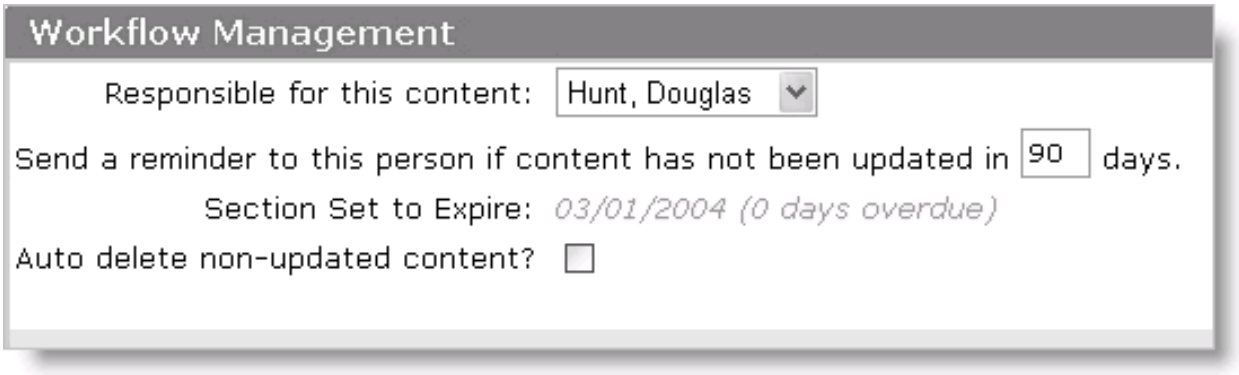


Members Only

Note: These groups can, but do not have to be, based on your back-end database's member types. They groups are set up as database queries, so they can be defined any way you wish.

Workflow Management

Below the content settings is the Workflow Management section. The general purpose of this section is to control how often this content will be refreshed and who will receive e-mail notifications when it needs to be updated.



Content Record Workflow Management

Responsible for This Content

The drop-down list in this part of the workflow section indicates who will receive the e-mail “nastygrams” when the content record reaches its expiration date. The drop-down list con-

sists of all the members of the content management group which controls the navigation item holding the content record.

Send a Reminder

The number of days entered in the box after “Send a reminder…” determines when e-mail reminders will be generated for this content. Content nearing its expiration date will also show up in the Task List of the responsible content producer. The default for number of days is a configurable system variable. You may adjust the number of days depending on the content. If the number is zero, no reminders will be sent.

Section Set to Expire

This simply lists the date that the content will have reached the date determined by the “Send a reminder…” feature. The content will not expire in the sense of disappearing from the website unless you check the “Auto delete” checkbox.

Auto Delete Non-Updated Content

If you check this box, the content will simply be deleted when it reaches its expiration date.

Managing Content Records

You can copy and move content records to a different content folder or content record, or to another website.

Copying a content record

1. From the e-CM Admin page, select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record to be copied.
4. Select the content record to be copied.
5. Select Copy.
6. The Content Properties page for the new (copied) content record displays. The new content record is an exact copy of the content record with the exception of the Publish File

Name, which is incremented to ensure that the new content record Publish File Name is unique.

Moving a content record

1. From the e-CM Admin page, select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record to be moved.
4. Select the content record to be moved.
5. Select Move. The Move Content pop-up window displays:
6. To move the content record to another content folder, enter the name of the content folder where the content record should be moved and select Move.
7. To move the content record to a different website, select Navigation Menu. Select the website and menu item where the content record should be moved and select Move.

Content History and Recovery

e-CM records and stores every published version of content. You can recall any previously published version of any content document. You can view the previous version, replace a newer version with the previous version, or work with the pervious version as a new document in a different location.

Deleted content goes to a recycle bin located in the content folder that contains the content record. You can drag deleted content to another content folder or use the Move icon on the content producer's toolbar to move the content to a navigation item.

Note: You can revert or retrieve content items such as HTML, links, and uploaded files. You cannot revert or retrieve tagged pages.

When you select the Versions icon on the advanced content producer's toolbar, a pop-up window displays the earlier versions of the current content record.

The pop-up window lists every version of the content that was ever published in a direct line back from the currently selected content record.

Note: You can make a new version of a content record by recovering an older version as a new content item. These branches will not be shown in the content history of the original content record, but will instead have their own content history since this content is now a new content record.

You can preview any prior version of the content, view the content properties for the content, revert the current published or working version to any prior version, or retrieve any version to create a new content item (and branch). Once an item has been retrieved or reverted it can be edited. Archived versions cannot be edited.

To revert a content record to an earlier version

1. From the e-CM Admin page, select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record to be reverted.
4. Select the content record.
5. Select Versions.
6. In the Content History window, use the preview buttons to determine the version to which you want to revert.
7. Select the Revert icon displayed to the right of the desired content record's name. A second pop-up window displays.
8. Select overwrite current content to overwrite the current content record and revert to the selected previous content version, or select create a new content to insert the select previous content version into the navigation item or folder you are working in.

Working with Content Folders

When you select a content record on a navigation item's properties page, the content record properties display. Content records display at the bottom of the navigation item's properties page. Most navigation items contain one or more content records. Each content record has a properties page.

The properties page for a content record contains the following sections:

- Content properties for the content record
- Workflow management
- Current items
- Current tags

Content folders are used to store items that will be displayed by tagged pages; items in content folders are not directly displayed on the website. You can create new content folders and content records on the Content Folders page. New content records can be previewed before they are published, but they are not visible on the front end until they have been published. You can modify content folders and content records before or after they have been published.

When a content folder is selected, the content records contained in the folder display on the right. The icons on the right indicate the type of content that the record contains.

You can modify the folder placement and hierarchy by dragging and dropping content folders.

Note: If you need to move a sub-folder to the root level, drag and drop the folder onto the folder icon that displays to the left of the Content Folders heading above the list of folders.

Individual content records can be in one of the following states:

- Published - Published content has been published at least once and has not been changed since it was last published. If no status indicator is displayed, the content is in the published state.
- Working - Working content is indicated by a red light. Working content is currently being edited, but has not yet been approved for publication. A new content record is always in the working state when it is first created. Any previously published content is placed in the working state when a user begins editing the content.
- Pending Approval - Content that is pending approval is indicated by a yellow light. This indicates that a content producer without content approver authority has finished creating or editing the content and has requested approval for the content.

- Approved - Approved content is indicated by a green light. Approved content is ready to be published.

Requirements for setting content record properties

- You should specify a meaningful title in the Title field, since this is the title that is used for any links that point to the content record if it is retrieved by a tagged page or if there is more than one content record in a navigation item. The title is also indexed and searched by the internal site search engine and by external commercial search engines. The title should be one that you want your users to see, and should be a brief and meaningful description of the content.
- The default Publish File Name is the title with any special characters removed and all spaces replaced by underscore (_) characters. You can change the Publish File Name if needed.
- The (future) Publish Location is an absolute path to the location where the content record will be published. This is the location where e-CM places the files when the content record is published. The (future) Publish Location is automatically determined by the system and cannot be changed.
- The Description/Summary is seen by website visitors and is also used by the internal site search engine and by external commercial search engines. You do not have to enter a description or summary, but it is recommended that you include a description or summary for each content record.
- The description in the Description/Summary field on the Content Properties page can be used for the search engine, displayed on tagged pages, and to display if a list of links or a “combo view” is selected for a navigation item with multiple records.
- The content record's initial publication date displays in the Date of Publication field on the Content Properties page. The content record's most-recent publication date displays in the Published Date field on the Content Properties page.
- To display the content without the typical navigation and design elements in your normal pages (for example, the breadcrumb trail), uncheck the Display within the template box.

You may want to disable this option, for example, if you content record displays a form or a letter from a board member or other content in which standard navigation and design elements would be inappropriate. You do not need to disable this setting with respect to files or links. For example, if you create a link to the New York Times website, e-CM will not attempt to display this site inside your template. Also, if the content record contains only a file (for example, a .jpg or .pdf file), the navigation link will not attempt to display the file within the template.

- If your site features integration with your membership database, enabling the Content is for specific groups only option causes a multi-select box to display, allowing you to select which membership types may view the content record.

  Recommended best practices for setting content record properties

- You can copy the location in the Publish Location field on the Content Properties page. This can be useful for linking from elsewhere on the site.

Understanding Keywords and Metatags

If you enter keywords for your content, the keywords do not appear on the front end. They are used by your site's internal search engine to find content. There are two reasons for using keywords.

If you have a document that does not contain a specific word or phrase that a user might use to search for the document, you can add this keyword. For example, if you have a document about tax policy that does not actually contain the phrase “tax policy”, you can enter “tax policy” as a keyword so that a search for this phrase will list the document.

You can also use keywords to change the position of a document when a user searches for a particular word or phrase. Your site's internal search engine sorts results by word occurrence (for example, a document that contains several occurrences of the phrase “tax policy” will be higher on the list of search returns than a document that only contains one occurrence of this phrase). If you want to ensure that a particular document is the first one that users see when they search on “tax policy,” you can enter the phrase as many times as needed, with each phrase entry separated by commas.

External search engines such as Google generally use your descriptions, but ignore your keywords.

The description and keywords properties both generate “meta tags” which are used by search engines to classify pages. The subject of meta tags and search engines is extremely complex and has spawned its own industry of consultants, but Search Engine Watch (http://searchenginewatch.com/webmasters/meta.html) includes a brief and opinionated description of the description and keywords meta tags.

Note: No major external search engines (such as Google) use keyword meta tags, but your site's internal Verity™ search engine does use them, so keywords are an effective way to ensure that a page is retrieved by your site search.

Managing Content Folders and Content

To create a new top-level content folder

1. Select Website.
2. Select Content Folders.
3. Select Create a new top level folder.
4. Enter the name for the new folder.
5. Select Go.

To create a new nested content folder

1. Select Website.
2. Select Content Folders.
3. Select the Create New Folder icon displayed to the left of the folder that will contain the new folder.
4. Enter the name for the new folder.
5. Select Go.

To edit a content folder

1. Select Website.

2. Select Content Folders.
3. Select the Edit icon displayed to the left of the folder that is to be edited.
4. Edit the folder's Properties and Workflow Management sections as needed.
5. Select the Save icon on the content folder toolbar.

To add content to a content folder

1. Select Website.
2. Select Content Folders.
3. Select the content folder that will contain the new content.
4. Select the Create new content icon.
5. Enter the information for the content in the Title, Content Properties, Workflow Management, Current Items, and Current Tags sections.
6. Select the Save icon on the content record toolbar.

To add a link to a content record

1. Select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record to be edited.
4. Select the content record.
5. Select the Insert New Link icon in the Links section of the Current Items section.
6. Enter the link's URL in the URL field in the Current Items section.
7. Enter the name to display for the link in the Link Name field.
8. Select Save.

To edit a content record

1. Select Website.

2. Select Content Folders.
3. Select the content folder that contains the content record to be edited.
4. Select the content record.
5. Edit the content record information in the Title, Content Properties, Workflow Management, Current Items, and Current Tags sections as needed.
6. Select the Save icon on the content record toolbar.

To upload a file to a content record

Note: e-CM allows users to upload approximately a dozen file types, but does not place any other constraints on uploaded files. For example, a user with upload permission can upload a 4000- by 2000-pixel graphic file, but this would normally not be recommended.

1. Select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record that will contain the uploaded file.
4. Select the content record that will contain the uploaded file.
5. Select Browse in the Files section of the Current Items section. A browser window displays.
6. Browse to the folder that contains the file to be uploaded and double-click the file or select the file and select Open).
7. Enter the file description in the Description field.
8. Select Save.

To preview a content record

1. Select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record to be previewed.

4. Select the content record to be previewed.
5. Select Preview.

To publish a content record

1. Select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record to be published.
4. Select the content record to be published.
5. Select the Publish icon. The publishing status displays in a pop-up window.
6. After the content publishing has been completed, select Close Window on the pop-up window.

Note: You must disable any pop-up blockers (such as the Google toolbar) for the publishing status window to display.

To delete a content record

1. Select Website.
2. Select Content Folders.
3. Select the content folder that contains the content record.
4. Select the Delete icon displayed to the right of the content record. A confirmation message displays.
5. Click OK.

To sorting files and links

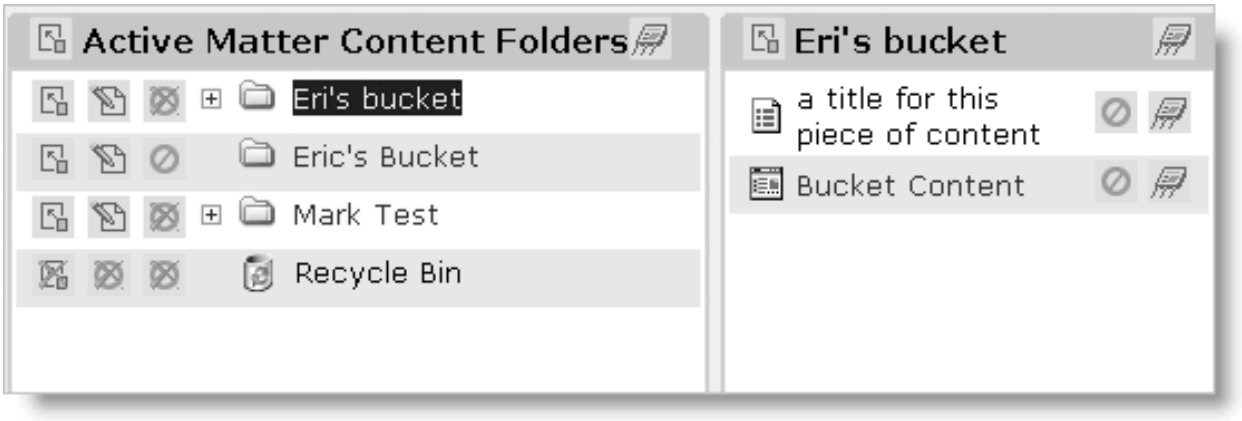
Links and files display on the website front end in the same order that they display on the back end. You can move the links or files on the back end and then republish the content record to change the display order.

Note: To move a link or file to the top of the list, you must first move the file to the second place in the list, and then move the file that is first in the list to second in the list.

1. Select Website.
2. Select Content Folders.
3. Select the Move this file icon displayed to the right of the file to be moved.
4. Select the Below this file icon displayed to the right of the file after which to place the moved file.

To delete a folder using drag and drop

To delete a folder via drag-and-drop, you drag the folder to the “Recycle Bin” at the bottom of the folder list.



Content Folders Showing Recycle Bin

1. Click and hold down your mouse button on the folder icon of the folder you wish to move (not on its name).
2. Drag the folder to the Recycle Bin icon, which appears at the bottom of the list of folders.
3. When the delete icon turns to an insert icon, let go of your mouse button.
4. When you see the confirmation message, click OK to delete the folder. If the folder is not empty, you will see a message telling you that the folder cannot be deleted until all content and child folders are removed.

To publish content in folders

There are three ways you can publish content in folders, all of which use the familiar publish ( ) button.

- You can publish all approved (“green light”) content in all folders.
- You can publish all approved content in a specific folder.
- You can publish an individual approved content record.

You probably won't have many reasons to publish all content in all folders, but you can do so if you are a member of Master Admin authority group by clicking on the publish button on the top bar of the left-hand pane of the folders interface.

Using the Recycle Bin

The Recycle Bin ( ) is the destination of all content records deleted from navigation items or content folders. This is a useful thing to know in case someone throws out a content record by mistake.

To recover content from the Recycle Bin

In order to retrieve content from the recycle bin, you will need access to content folders and also to the advanced version of the content producers' toolbar (since only the advanced version contains the Move icon). You must also be a member of the Master Admin group.

1. Go to the content folder interface and click on the name of the recycle bin. The page will re-load and all the content records in the recycle bin will be listed in alphabetical order.
2. Select the content record you want to recover to open the properties page for the content record.
3. You will note that nearly all of the icons on the toolbar are grayed out, but not the Move icon. If you do not see the Move icon, make sure that you have selected Advanced as your toolbar option.
4. Click the Move icon on the toolbar.

5. When the Move Content pop-up form displays, select Navigation Menu or Content Folder as your general destination.

- If you select Navigation Menu, select a website and menu item.
- If you select Content Folder, select a folder.

6. Click the Move icon at the bottom of the pop-up form.
7. If you moved your content record to an item, you will be taken to the item's properties page.

   Note: In the “Move Content” form, only items and folders which are owned by authority groups you belong to will appear. Unless you are a member of the Master Admin “super-group” you cannot move content to an item or folder owned by a group you do not belong to.

8. If you moved your content record to a folder, you will be taken to the content folder interface with the destination folder selected to show content records.
9. In both cases, your recovered content will now be in a working (red light) state. You may now approve, edit, and publish normally. Note that the record will not appear on the front end of the website until it is approved and published.

Destination Selected, Ready to Move

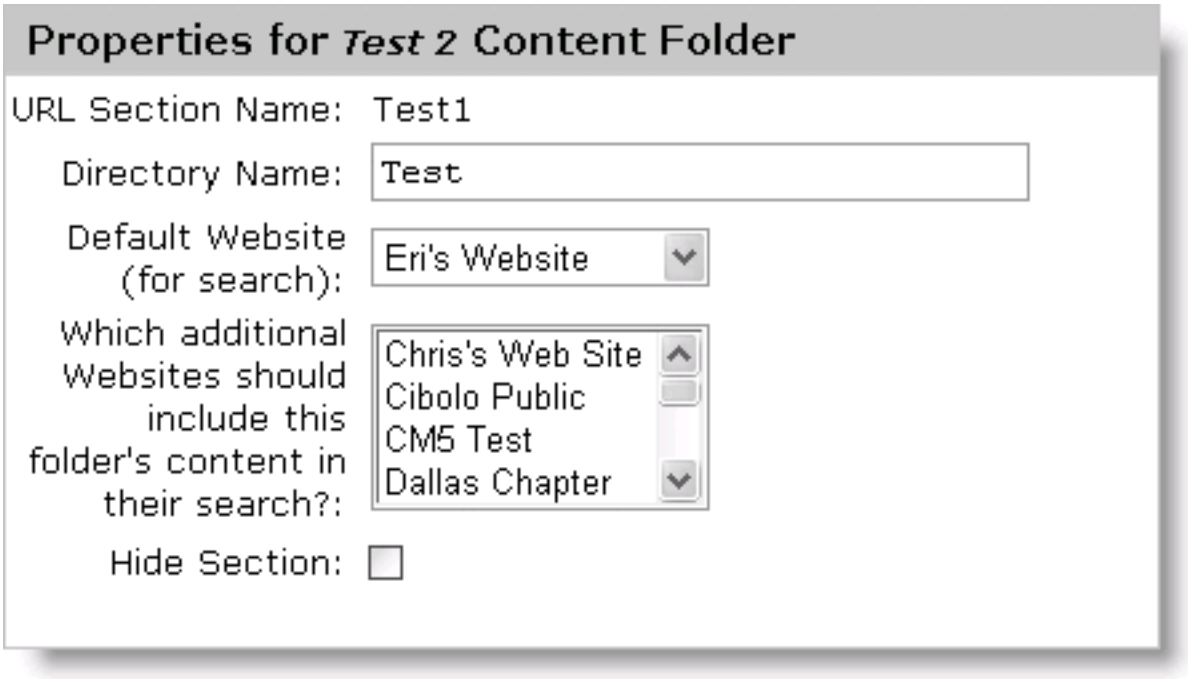
Note: You can drag content from the recycle bin to a content record, but you must open content in the recycle bin and move it in order to move the content to a navigation item.

Reviewing Content Folders Properties Page Settings

Like navigation items, individual content folders have a properties page which includes various settings which control the behavior of the folder. Since they are not linked to site navigation, the properties page is simpler and shorter than that of a navigation item, but it also includes some settings not found on a navigation item.

To view a folder's Properties page

- To view a content folder's properties page, you will need “Nav/Folder Editor” permissions in the authority group, which owns the folder or in the Master Admin “super group”.
- To view a content folder properties page, select the Edit icon to the left of an individual folder.



Content Folder Properties page

Title

The title of the content folder is what will appear to administrators in the administrative interface. It is not displayed to users.

URL Section Name

This is a unique character string generated by content manager to ensure that the content in this folder will be published in a unique location. It cannot be changed by the administrator and is not displayed to users.

Default Website (For Search)

If you are supporting multiple websites, you may select a default website for which this folder's content will be “native” content (and thus ranked higher in search returns). The folder must also be owned by an authority group with is active for the default website.

Additional Websites

Any websites selected in the multi-select list underneath the default website will also include content folder in their site search.

Hide Section

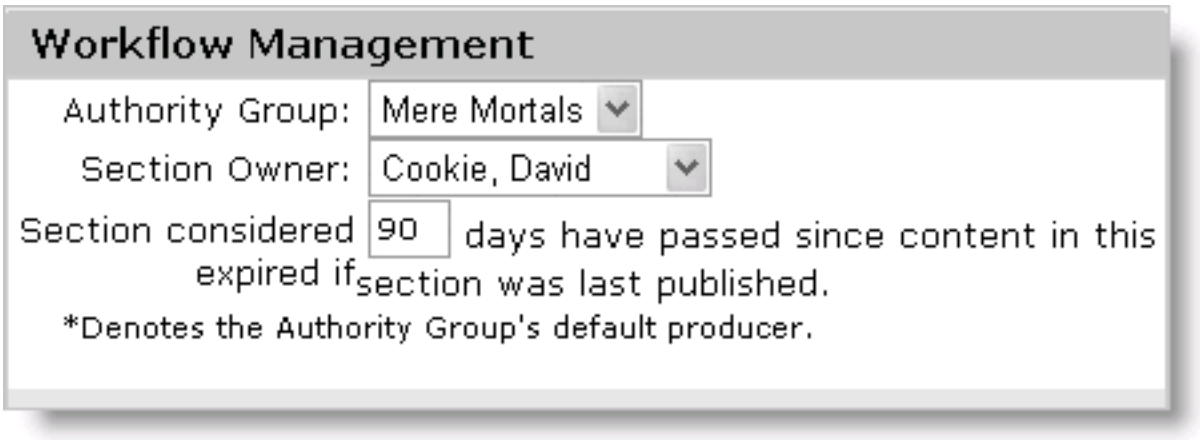
If the “Hide Section” box is checked, content in the folder will be hidden from both tagged pages and site search.

Content Folder Workflow Management

The workflow section in a content folder properties page determines who can access the content and who will receive e-mail notifications if the folder's content is not re-published.

Authority Group

The authority group drop-down list determines which users will be able to access content in the folder. Here, the “Mere Mortals” group owns the folder, so in order to access the folder's content, a user would have to be a member of that group (or the Master Admin super-group).



Content Folder Workflow

Note: The folder must also be owned by an authority group which is active for the default website, so the drop-down list will include only authority groups from the selected default website.

Section Owner

The section owner, who must be a member of the selected authority group, is the person who will receive e-mail notifications if the content goes more than the selected number of days without being refreshed.

Expiration Date

The expiration date determines how many days must go by without re-publication before e-CM begins sending e-mail notifications to the section owner. “Expired” folder content is not deleted and is still visible to web users.

Security Assignments and Content Folders

Regardless of what authority groups a user may belong to, they cannot access content folders without the “Content Folders” security assignment permission.

Security Assignment Showing "Content Folders" Permission Checked

Content Record Icons

The icons shown to the left of the content record's name in the right pane of the content folder indicate what type of content will be found in the record.

The right hand pane lists all of the content items in the folder highlighted in the left. Items in this pane have the following properties

- Icons are as follows:
- - HTML
- - Excel™ Spreadsheet
- - Form
- - Graphic file (e.g. gif or jpeg)
- - Link
- - Combo-mode Content (more than one type of content, e.g. html and files).
- - PDF Document

- - QuickTime™ Movie
- - Word Document
- The traffic light icons on the right indicate the current publishing state of the item:
- Content is being worked on
- Content is pending approval
- Content is approved and ready to be published
- Clicking on the icon next to an individual piece of content deletes the piece of content (after the user confirms the action via a JavaScript confirm pop-up).

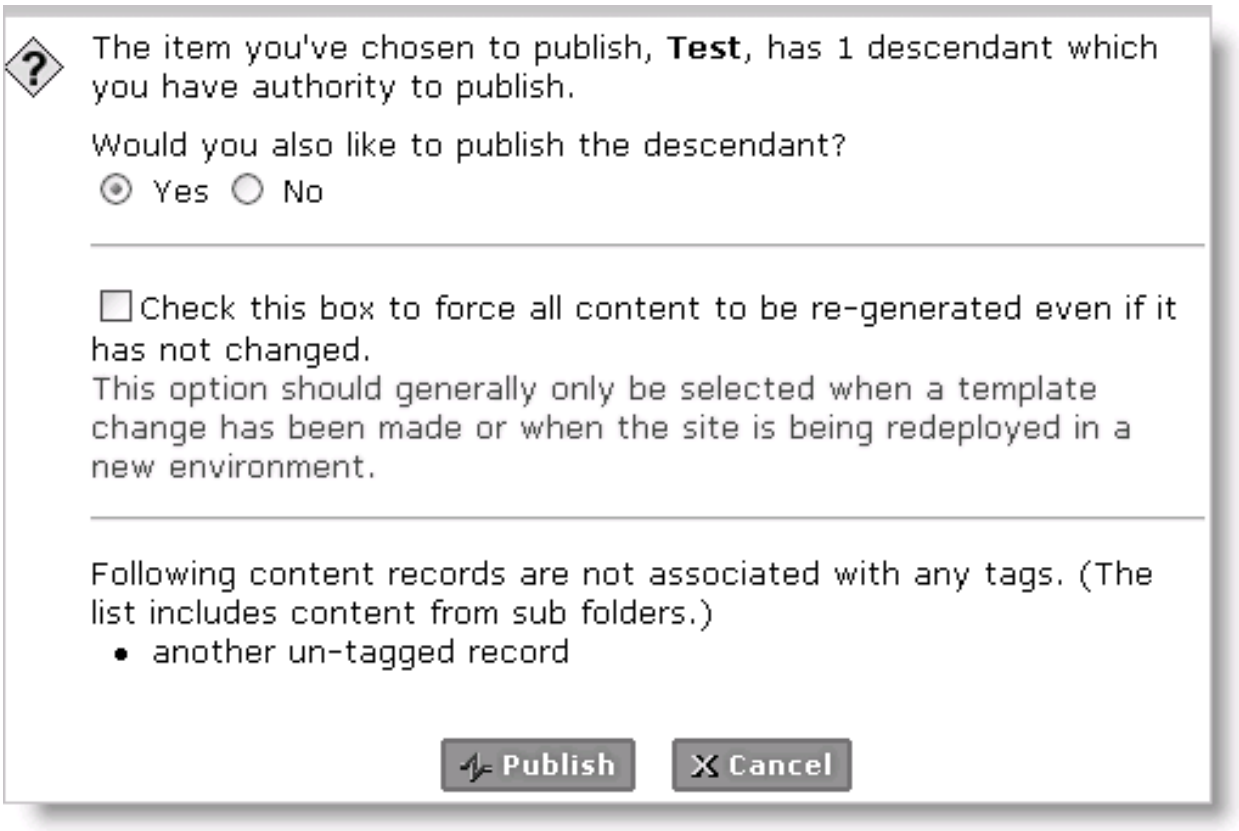
Publishing in Content Folders

Publishing in Content Folders is relatively straightforward:

- Clicking the Publish icon to the right of the content item publishes that content item.
- Clicking on the Publish icon at the top right of the pane publishes all content (required Nav/Folder Editor permission in the authority group which owns the folder or in the Master Admin group).

The No Tags Advisory

When you publish all the content in a folder, e-CM asks two familiar questions seen in navigation items, whether you want to publish the child folders and whether you want to re-publish all content even if it has already been published. It also advises you if there are any content records in the folder or its child folders which have not yet been tagged. There is nothing wrong with publishing un-tagged records in a content folder - unless you expect them to show up on tagged pages (instead of only site search).



Folder Publish Screen Showing "No Tags" Advisory

Working with Task Lists

The task list helps users keep track of content that requires some action on their part. The task list is divided into four queues:

- The content that the user is working on
- The content that is awaiting approval
- The user's content that will expire soon
- The content that the user has been requested to change via surf-to-edit

Note: Simple websites do not include the task list functionality. If the user has access to both simple and advanced websites, only the content from advanced websites will be listed in the task list queues.

Content record titles display as links in the task list queues. These links go to the editor or the content properties page properties, depending on the specified preference of the user.

Any content producer can access their own task list. Members of a content authority "super group" can also view other user's task lists.

Managing the Task List

To access the task list

1. From the e-CM Admin page, select Website.
2. Select Task List.

The following sections display in the user's task list.

Content You are Working on Queue

The Content You Are Working On queue lists all content that is in Working status, where the last user to modify the listed content is the currently logged-in user. Preview and Approve (or Submit for Approval) icons display to the right of each content link.

Content Awaiting Your Approval Queue

The Content Awaiting Your Approval queue lists all content with a Pending Approval (approval requested) status which the user has the authority to approve. Preview and approval buttons display to the right of each content record link.

Note: If more than one user has the authority to approve a particular content record, the record may display in more than one user's Content Awaiting Your Approval queue.

Content Expiring Soon Queue

The Content Expiring Soon queue lists all content owned by the user which expires in the next n days (where n is the number of days determined by the content producer preference). Preview and Approve or Publish icons display to the right of each content record link.

Content Requests Queue

If you select the surf-to-edit link but do not have edit privileges, you can send a request to the content producer (the user currently working on the content or the user who most recently worked on the content). When you send a request, an e-mail message is sent to the content producer and the request displays in the user's Content Requests queue.

The Content Requests queue includes the following:

- A Delete icon (to delete the request)
- A link to the content (the name of the content record)
- The name of the person who made the request; when selected opens a new e-mail window
- A Preview icon
- A Mark this as complete icon (to remove the request from the queue)
- A Reassign icon (to forward the request to another content producer)

To reassign a request to another producer

To reassign a request to another content producer:

1. Select the Reassign ( ) icon to the right of the request text.
2. Select the Send to drop-down list and select the person to whom you wish to reassign the request.
3. (optional) Add to or change the original request message.
4. Click Send. It will now appear in the selected user's request queue.

Note: When you reassign a request, e-CM will also send an e-mail to the person you have reassigned it to.

Reviewing Other Users' Tasks Lists

If the user is a member of a “super group” such as Master Admin, the user can view any user's task list. This feature is not available for users who are not in a “super group”.

Note: Personal preferences for the logged-in user are used, regardless of which user's task list is being viewed.

1. From the e-CM Admin page, select Website.
2. Select Task List.
3. Select the user whose task list you want to view from the View task list for drop-down list.
4. Select Refresh.

Using the Ektron Editor

The Ektron WYSIWYG ("What You See Is What You Get") Editor allows you to create and edit HTML files. Before you install the Ektron WYSIWYG Editor, be sure to review the following section before you begin the installation process.

Note: Use the version of the eWebEditPro editor that is bundled with youre-CM release. Other versions may be incompatible with e-CM.

Read This First

The WYSIWYG editor must be installed on each machine that you use it on. The installation is simple and easy, generally takes no more than a minute or two (a little longer on slower connections), and does not require you to restart the machine.

However, if you are working in a network environment where you do not have the authority to install software, you will have to contact an IT person to either login as an administrator and do the installation for you, or to temporarily grant your login permissions to install software.

Note: You do not have to install Ektron separately for each login that may use a machine. Once the software is installed, it will work for any login.

If the installation fails, check to see if:

- You have permission to install software
- Your site has a valid Ektron license

- Your firewall prevents you from installing Ektron over the network
- You have pop-up blocking software installed

Firewall Issues

If you have a highly protective firewall installed on your network, you may well have a problem doing the normal installation, which simultaneously downloads and installs the Ektron editor from the web.

Pop-up Blocker

If you have pop-up blocking software on your computer, the installation page will not appear. This will prevent you from installing the software. Be sure to disable pop-up blocking software before you install.

Note: Since various parts of the administrative interface depend on pop-up windows, if you have pop-up blocking software on your computer, it will effectively disable the interface.

Installing the Ektron Editor

Make sure your browser's security settings are set to Medium or below to download and run the ActiveX controls which make Ektron work.

Note:

Note: If you are an IT person and you just want to install the editor without going into e-CM, you can obtain a URL from your project manager or consultant that will allow you to directly access the installation file. To start the installation process, you simply add the file path to your base URL and press Enter.

1. Login to the e-CM Admin page. Make sure you have the appropriate account permissions (authority to edit content is adequate). You can force a login by adding “AdminTemplate.cfm” to your base URL.

2. Select Website> Site Navigation.
3. Select a site navigation item.
4. Scroll down to the Content Records section and select a content record in which you have authority to edit.
5. Scroll down to the Current Items section of the content record properties page.
6. Select Edit or Create to open the basic HTML page.
7. At the bottom of the page, there are two links available to install eWebEditPro (Ektron Editor). Select a link to start the installation process.
8. Click Install Now.

   Note: During the installation process, several security alerts may display. If the alerts are from Ektron or Microsoft, click Yes.
9. Click Install Now to begin the installation process. If the installation is successful, Installation Complete will display.
10. Click Close.

Accessing the Ektron Documentation

To get detailed instructions on using Ektron, you can download the user guide from the Ektron site (Ektron eWebEditPro doc landing page - http://www.ektron.com/ewebeditpro-html-editor.aspx?id=1277). Find the manual for the version of the eWebEditPro editor that is bundled with your e-CM release.

Manuals are available in both PDF and HTML formats.

To determine your Ektron version number, open the Ektron editor and select the Ektron icon (blue “e” button) located on the extreme right of the Ektron editor's top toolbar.

Using the Ektron Editor with HTML Files

The Ektron Editor allows you to create and edit HTML files to be used with e-CM. There are several differences between using Ektron and writing your own HTML. If you wish to continue writing your HTML, please consider the following:

- HREFs to external sites - Make sure any HREFs to external sites contain absolute URLs (starting with http://).
- Internal links - Make sure to verify internal links. The Copy to Clipboard feature may be useful when inserting internal links.
- Images - Periodically make a local copy of your site's entire /Image directory (including subdirectories) to a location relative to your HTML editing directories. You can then create a relative link to your images. For example, <IMG SRC-C="../../Images/Logos/2006/myImage.gif">. When you are ready to upload the file, you can do a global replacement of the relative path with the appropriate absolute path to your site's Images folder.

  For further details, refer to the Ektron Editor documentation (Ektron eWebEditPro doc landing page - http://www.ektron.com/ewebeditpro-html-editor.aspx?id=1277).

  Reviewing Cascading Style Sheets

  Your Website will be controlled by cascading style sheets; therefore, any special font or paragraph specifications in the HTML that are not in the style sheet will be ignored by e-CM.

  Using Span Tags in HTML

  If you learned to write HTML before the widespread use of HTML, you may be used to using font tags (for example, <font size=+1 face=arial>) to create specific effects. The bad news is that you generally cannot do that in a site with cascading style sheets because attributes for the font tag (including size and face) are already specified in the style sheet. The good news is that with the use of the tag, you can access any of the many styles in your cascading style sheet and use them in your text. For example, the standard CM style sheet (located at /Styles/Styles.css) contains a style called “Error” which is generally a bold red font face. If you wanted to use this style in your HTML document, you would type something like the following in HTML view, not in WYSIWYG view:

  This is a really important message that should appear in bold red

This book will not provide a detailed explanation of cascading style sheets. If you want to download a copy of your style sheet, select View> Source from your browser's main menu. Look for a line similar to this:

<LINK REL="StyleSheet" HREF="/Styles/Styles.css" type="text/css">

The text after HREF specifies the location of your style sheet. To access your style sheet append your base URL address with HREF listed (for example, /Styles/Styles.css) and press Enter.

Depending on how your site is designed, and which pages you are viewing, you may see more than one style sheet (for example, a general style sheet and a specific one for the particular page you accessed).

You may not be able to download your style sheet if it is protected on your network. The style sheet should provide enough information about the styles that are available to you. For example, here is an excerpt from a style sheet defining the appearance of the heading level four <h4> tag:

h4 {font-size: 13px; color: #000000;}

Note: If you have access to the /Styles/ directory and you modify cascading style sheet, keep in mind that any change you make to a style will affect the way that style looks on your entire site. Be sure to make a back-up of the style sheet in its original form before you start.

Working with Images

It may be difficult to open large image files on the Web. We recommend that you upload gif or jpeg (or jpg) images files. These file types generally produce smaller files that will be easier to render on most web browser. Try to avoid uploading tiff image files.

Note: Make sure the image file name does not contain spaces. If the name contains spaces, rename the file and remove the spaces.

To insert a new image

1. Open your HTML file in the Ektron editor and position the cursor where you would like to insert the image.

2. Select the Picture icon on the editor toolbar to open the Picture Properties form.
3. Click Select New File to open the Image Manager window.

   To insert a new file (not located on the server):

- Click Browse to navigate to the image location.
- Select the image file.
- Click Upload Image from the Image Manager window. A preview of the image will display in the upper-right pane of the Image Manager window.
- Click OK to return to the Picture Properties form.

  To insert a file from the Image Manager:

- Expand the folder and select the image file. A preview of the image will display in the upper-right pane of the Image Manager window.

4. Click OK to insert the image.

   To delete an image from an HTML file

   Use the following procedures to delete an image from an HTML file, but leave it on the server:

1. From the Ektron editor (WYSIWYG view), select the image.
2. Press the Delete key on your keyboard.

   To delete an image from the server

   Use the following procedures to remove an image from the server and the HTML file:

1. From the Ektron editor (WYSIWYG view), access the Image Manager.
2. Open folders as needed to find the image you wish to delete.
3. Select the image.
4. Click Delete.
5. Click OK when the confirmation window opens.

Note: Do not remove an image from the server that is currently included on your Website.

Altering Image Properties

The Picture Properties form allows you to resize images and change their ALT (mouse-over) text.

There are a number of less frequently used image attributes on the Picture Properties form as well. These include:

- Border: You can add a border around an image. The border width is specified in pixels and the border color is black.
- Alignment: You can specify a number of alignments for your image (including left and right). Note that these alignments will generally override any alignments you have specified within a table.
- Spacing: You can add a horizontal or vertical space around an image. Values are in pixels.

Consider the following when resizing images:

- Web images can be made smaller than the actual size, but rarely look good if made larger.
- Since you are dealing with length times the width, you need to be aware that any change you make will be multiplied. For example, if you make the width half the original value and the height half the original value, the resulting image size will be one-fourth as large, since ½ * ½ = ¼.
- Proportion is critical. If you reduce the height of an image by half and the width by a third, it will look very strange. If the original size divides easily (for example, an image 200 pixels wide and 100 pixels high), you can probably do the re-sizing math in your head. If the image has an original pixel size that does not lend itself easily to division, use a calculator to make sure you reduce both dimensions by the same percentage.
- When you resize an image, you are not changing the dimensions of the original image on the server - you are only making it look smaller in this particular place.

- It is not generally a good idea to work with extremely large images and then resize them in HTML. Large files are still large files, and they will still display slowly to users with slow Internet connections. It would be better to have the actual file edited to a more appropriate size.

  To resize an image

1. From the Ektron editor (WYSIWYG view), right-click the image.
2. Select Picture.
3. Click Reset. The Width and Height values are restored to the actual image values in pixels.
4. Change the Width and Height values to the pixel size you want displayed.
5. Click Preview.
6. Click OK.

   To add “Alt” text to Images

   Alt text is the text that appears when you place your mouse cursor over an image. This feature is helpful to those users with impaired vision who are use text readers. By default, the Ektron editor will automatically insert the word Image as the Alt text. Use the following procedures to add descriptive text:

1. Right-click on an image and select Picture to display the Picture Properties form.
2. In the Title, replace Image with your preferred Alt text.
3. Click OK to make your changes and close the form.

   Note: The WYSIWYG editor will not display Alt text when you place your mouse pointer over an image. Alt text will appear when you preview your HTML file or content record using the preview buttons.

Images and Directories

To place an image into a specific folder

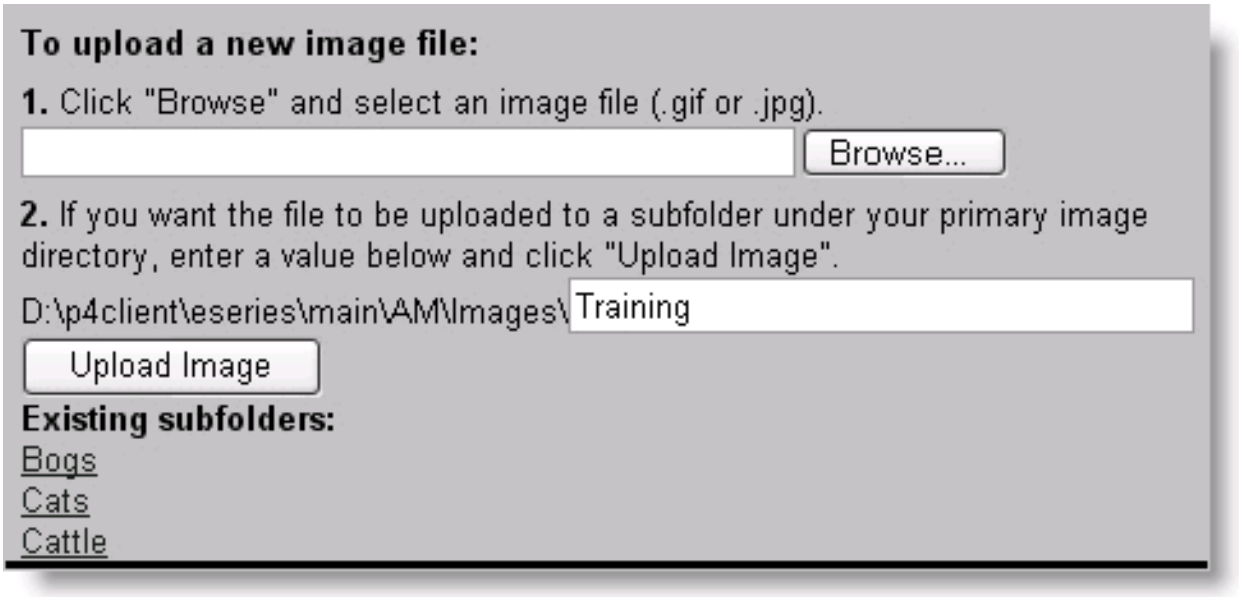
If you wish to place an image in a particular folder when you upload it, do the following:

Note: You will not be able to rename or delete folders in the Image Manager once they are created.

1. Follow the instructions for inserting a new image, but do not click OK.
2. Select or enter a folder in which you want to upload the image.

- To select an existing folder from Image Manager, select the folder.
- To create a new folder, enter the folder name in the path field located above the Upload Image button.
- To create a new sub-folder, enter the folder name in the path field located above the Upload Image button. Add a “\” after the folder name and enter the sub-folder name.

  Note: Please careful not to misspell the folder name(s), because you will not be able to remove the folder once it is created.



Upload to a Specific Directory

To create a new sub-directory

Creating a new sub-directory to place your image into is easy. If you want to create a new main directory (right under “Images”):

1. Follow the step-by-step instructions for uploading a new image, but before you click OK, type the name of the new main folder you would like to create into the box right after "...\Images\".
2. Continue with your upload in the normal manner. When you click Upload Image, the new directory will be created and the image will be placed in it.

If you want to create a new sub-directory (a "child" of one of the existing directories):

1. Follow the instructions for uploading a new image, but, before you click OK, click on the link with the name of the parent folder you want to create your new sub-directory in. Alternatively, you can click on the folder icon of the parent in the upper-right portion of the interface.
2. The directory path box will now be populated with the proper sub-directory information for the parent folder. Add a "\" and then the name of your new folder (no spaces) after the automatically inserted directory information.
3. Continue with your upload in the normal manner. When you click Upload Image, the new subdirectory will be created and the image will be placed in it.

Using Image Manager Directly

You don't have to use Image Manager from within an HTML file. It can also be launched by clicking the Sites button in the "Website" portion of the administrative interface, then clicking the "Image Manager" link.

When launched this way, Image Manager can perform all of its usual functions except placing an image into a specific HTML file. You can look through your image directories, create new directories, upload images and delete images.

What You Can't Do With Image Manager

Image Manager will not allow you to re-name or delete directories. It will not allow you to move sub-directories from one parent to another. It will not allow you to re-name files. Why? Because doing so is likely to cause problems with broken image links in your existing pages.

Breaking the Rules in Image Management

If you've read the limitations immediately above and are thinking “I'm an experienced web-master and those rules should not apply to me!” we're now going to tell you how to break all the rules. Remember, those deliberately designed limitations in Image Manager protect you from causing broken image links. If you do an end-run around Image Manager (for example, to clean out a large number of old unused images when your site is first set up), it's your responsibility to ensure that you don't cause problems.

So here's how you do it: Assuming you have access to your webserver, select an existing image with the Image Manager and right-click on it to get its properties in the upper-right preview pane. File paths vary somewhat, but you should be able to “reverse engineer” the actual directory location from the URL in the properties page. If for example, the URL is: http://www.mywebsite.org/Customer/AM/Images/myPicture.gif

then you know that your images are at WWW/Customer/AM/Images. Once you get there, you can edit, change, or move anything you like, and those changes will be reflected in Image Manager next time you open it. Remember to be careful.

Another method is simply to look at the page information to the left of Upload Image.

Linking to Other Documents

You can include links to a page on the web or to another page on your Website. It is normally safe to include a link to a file that is set to open in a new window. When including links, make sure to consider the following:

- Avoid linking to content records in Content Folders - Content Folders should be used for content that will be retrieved by tagged pages and site searches. Because they are outside the navigation structure defined by Navigation Items, your template will not know which navigation buttons or links to display if a user clicks through directly to a content record in a folder.
- Avoid linking to individual files in Content Folders - Content Folders will be renamed, moved, and reorganized as your content grows; therefore, causing links to break.

The following situations can cause also links to break:

- Changing the URL Section Name of a navigation item.
- Changing the Directory Name of a navigation item.
- Replacing a file with a new file with a different name and/or file extension.
- Changing parent-child relationships in a navigation item.
- Moving a navigation item.

Inserting Links

You can create external links to files located on a different website or you can create internal links to files on your website. You can also choose a target frame (window) where the link will open.

To create a link to an external web page

1. Place your cursor in the HTML file where you wish to insert the link.
2. From the Ektron editor (WYSIWYG view), click New Hyperlink.
3. Enter the full URL starting with “http://” in the Link field.
4. Enter the Text you want the user to see when they see the link on the page.
5. Select the Target Frame to display the link.
   - Same Window (_self) - displays the linked file in the same browser window
   - New Window (_blank) - displays the link file in a new window
   - Parent Window (_parent) and Browser Window (_top) - relate to sites with frames
6. Click OK.

To create an internal link

To create a link to an external web page:

1. Place your cursor in the HTML file where you wish to insert the link.

2. From the Ektron editor (WYSIWYG view), click New Hyperlink.
3. Enter the full URL starting with “http://” in the Link field.
4. Enter the Text you want the user to see when they see the link on the page.
5. Select the Target Frame to display the link.

- Same Window (_self) - displays the linked file in the same browser window
- New Window (_blank) - displays the link file in a new window
- Parent Window (_parent) and Browser Window (_top) - relate to sites with frames

6. Select the Navigation Menu Section drop-down list and select the navigation item (button or link) you want the user to see.
7. Select the Content Record drop-down list and select the content record.
8. Click OK.

   Note: The Navigation Menu and Content Record drop-down lists only appear when you are creating new links, not editing existing ones. If you need to edit an existing internal link, select the Remove Link icon and then insert a new link.

   To preview links

   After inserting or editing a new link, it is important to preview the link to make sure the link is correct and that it opens correctly. The link should be previewed from the Content Record Properties page.

   To insert a link with the Copy to Clipboard feature

   You can also use the Copy Publish Path to Clipboard icon, which looks like a small clip-board ( ) to copy the link information from a file to your system clipboard. You can click New Hyperlink to open the link editing form and then press Ctrl+V to paste the information into the link form.

   This icon appears in the following places on the e-CM's interface:

- To the right of each content record in the list of content records at the bottom of the navigation item properties page.
- To the right of an individual HTML files within content records, on the content record properties page
- To the right of each file in a content record

1. Select the Copy Publish Path to Clipboard icon.
2. Select the New Hyperlink icon in the WYSIWYG editor to open the link editing form.
3. Press Ctrl+V to paste the path information into the Link input on the form.
4. Enter the text for the link.
5. Click OK.

   Note: You can also use the Publish Location feature to copy path information for a content record to your system clipboard. Click on the link to the right of (future) Publish Location field as you would on the clipboard icon and then paste the information into your link forms.

Creating Bookmarks (Internal Links)

Bookmark links allow users to jump to the proper place on a page. For example, you may want to create a bookmark link that goes from the top of the page to a section heading near the bottom of the page.

To insert a bookmark

1. Position your cursor where you want to insert a bookmark.
2. Select the Insert Bookmark icon (blue flag to the left of the New Hyperlink icon).
3. Enter the bookmark name (spaces will automatically be replaced with an underline).
4. Click Add.

To insert a link to an internal bookmark

1. Enter and select the text you wish to use for the link.

2. Select the New Hyperlink icon.
3. Select the Quick Link drop-down list and select the bookmark.
4. Click OK.
5. Save the HTML file and then select the link to test it.

Note: After inserting a new bookmark link, it is important to preview the link to make sure the link is correct and that it opens correctly. The link should be previewed from the Content Record Properties page.

To insert a link to an external bookmark

1. From the website, select the bookmark link. A link to the bookmark will display in your browser's address bar. The URL address is appended with the # symbol and the name of the bookmark.
2. Copy (Ctrl+C) everything after the # symbol.
3. From the WYSIWYG editor, open the HTML file and place the cursor where you want to insert the link.
4. Select the New Hyperlink icon.
5. Press Ctrl+V and paste the bookmark information at the end of the URL Link.
6. Click OK.

Content Tagging in e-CM

A normal web page that is stored in a site navigation page consists of content that has been created for a specific site navigation item. On the other hand, a tagged page retrieves content based on how the content is tagged rather than based on where the content is located in a site navigation item or content folder. The retrieved content is then displayed on the tagged page. The simplest method to display tagged content is to display a list of links to the content, but tagged pages can also display HTML files and images.

Normal pages in e-CM are static. When you publish a content record, the content is written to a file on the webserver's hard drive. Tagged pages are dynamic, with self-

contained instructions to retrieve content with specified tags and display this content. Tagged pages can retrieve content from site navigation items, but tagged content is usually stored in content folders.

You can create tags and assign these tags to content so that relevant content is automatically included in web pages. This helps avoid unnecessary duplication of content and ensure that all relevant content is included in the appropriate web pages.

Before you can tag content, you must first create the appropriate tags. In order to create useful and meaningful tags, you should analyze your website's current and future content needs before you start actually creating tags.

Anatomy of a Tagged Page

The basic idea of a tagged page is simple: It is a template with instructions that allow it to grab content and display it in a particular way. The mechanics of how pages get put together, though, can be complicated. So we're going to start with a very simple page. We will take a look at the parts of a tagged page as we go, and then talk about them in a little more detail when we're done.

These are the basic ingredients in a tagged page:

- Components are the widgets that grab the content (based on how it has been tagged) and determine how it gets displayed.
- One or more components are held in a display block, a rectangular area in a page that holds components.
- A tagged page is a page containing one or more display blocks.
- The layout (number and arrangement of display blocks) of a tagged page is determined by a page plan.

These are the seven page plans that come with e-CM:

Plan 1 Plan 2 Plan 3 Plan 4 Plan 5 Plan 6 Plan 7

Plan 1 is the simplest (one display block); the other plans have as many as four display blocks, arranged in various ways.

At the most basic level, your tasks to create a tagged page are as follows:

1. Choose a page plan to determine the basic layout of your tagged page.
2. Put one or more components into each display block in that page.
3. Add appropriate tags to the component(s), so that appropriate content will be retrieved.
4. Insert a link to the tagged page in a content record in a navigation menu item (this is how the website visitor will actually see your tagged page).

How Content Actually Gets Tagged

The first and most obvious question is: what gets tagged? You tag content records. Not items, not folders, just content records. As with most other functions in e-CM, you tag content using the content producer's toolbar.

Note: Notice that this means that you don't want to mix items which need to be tagged differently in the same content record - for example, a large group of uploaded PDF files.

To tag a content record

1. Go to the content record properties page.
2. If you have set your preference to require you to click the Modify button before modifying a content record, do so.
3. Click Tag on the content producers toolbar.
4. Select the tags you want to apply to the content record from those on the pop-up form by checking the appropriate boxes.
5. Click the Save and Close button at the bottom of the tagging form.
6. Click the Save button on the content producer's toolbar to save your changes.

Note: If you do not click the Save button on the toolbar as well as the Save and Close button on the tagging form, your changes will not be saved.

Tag Button on Content Producers Toolbar

Tagging Form

Note: Understand that all tags are independent of each other. Selecting a “parent” tagging category does not select all its children (or vice versa). For example, if the animal tag-

ging category contains cat and bird tagging categories, selecting the animal tagging category does not automatically select the cat and bird tagging categories.

How Do The Tagged Pages Know Which Tags to Look For?

If you've been paying close attention, you might notice that we've explained how to tag content, but not how to tell a tagged page component which tags to look for when it searches for content. We'll get to that next when we built the world's simplest tagged page.

Summary

- The process of tagging involves associating pieces of content with tagging categories, which have been chosen to match the overall structure of content in your site
- Tagging allows you to use “smart” pages called tagged pages to retrieve content based on how it is tagged.
- Tagging can also be used to supports site search and personalization.
- Tagged pages are made up of rectangular blocks called “display blocks”
- The arrangement of the blocks is determined by which “page plan” a tagged page uses.
- Each display block contains one or more “components."
- Components are content-gathering engines that grab content based on how the content is tagged and what tags the components have been instructed to look for.
- Content is tagged on the content record properties page by clicking the tag button on the content producer's toolbar.

Building Your First Tagged Page

If you are teaching yourself tagged pages on a “live” website, there are some things you need to keep in mind to make sure that you don't affect the content on the front end.

Things that are fine to do:

- Using previously tagged content without changing the tagging.
- Creating a tagged page design and preview it.

- Creating new custom components.

Things you should not do include:

- Putting your tagged page in a content record and publishing it (stick to viewing your tagged page via preview on the back end).
- Creating new tags or deleting old ones.
- Putting additional tags on any pre-existing content or removing any of the tags that are already there.
- Editing any of the existing tagged page designs or custom components (it is fine to look at them, but don't save any changes).

Permissions You Will Need to Edit Tagged Pages

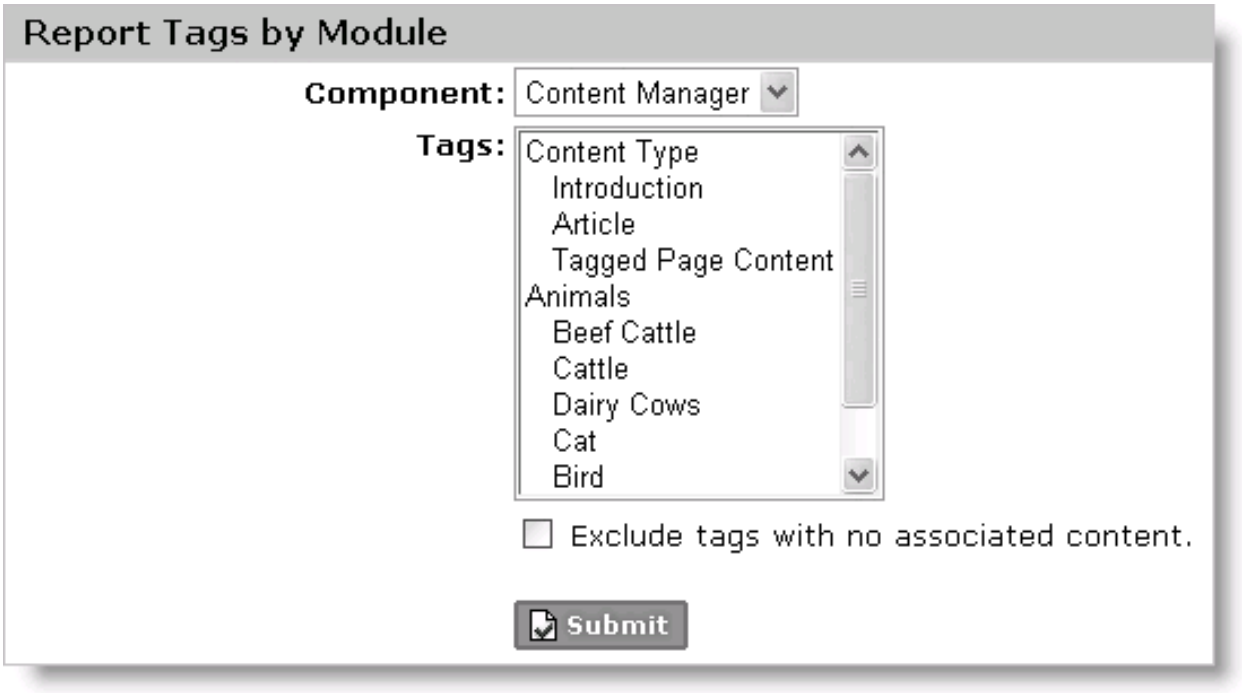
Simply being a member of one or more authority groups (even “Master Admin”) will not give you access to the tagged page editing interface or to the list of content tags. You will also need the “Tagged Pages” and “Tagging Categories” security settings.

Tagging-Related Security Settings

To see if you have tagged content

Before you start building your first tagged page, you need some tagged content records or your page will have nothing to display. They can either be in navigation items, content folders or both. If you do not have any tagged content, you will need to either tag some existing content or to create new content to tag.

1. After logging into the administrative interface, click on Websites in the upper-left.
2. Click on Tagged Pages on the left.
3. Click on the Report Tags by Module link.



Report Tags by Module Form

4. You should now be looking at the Report Tags by Module form. If e-CM is not already selected in the Component drop-down list, select it. Check the Exclude tags with no associated content box.
5. Click the Submit button at the bottom of the form.

Sample Output from Report Tags by Module Form

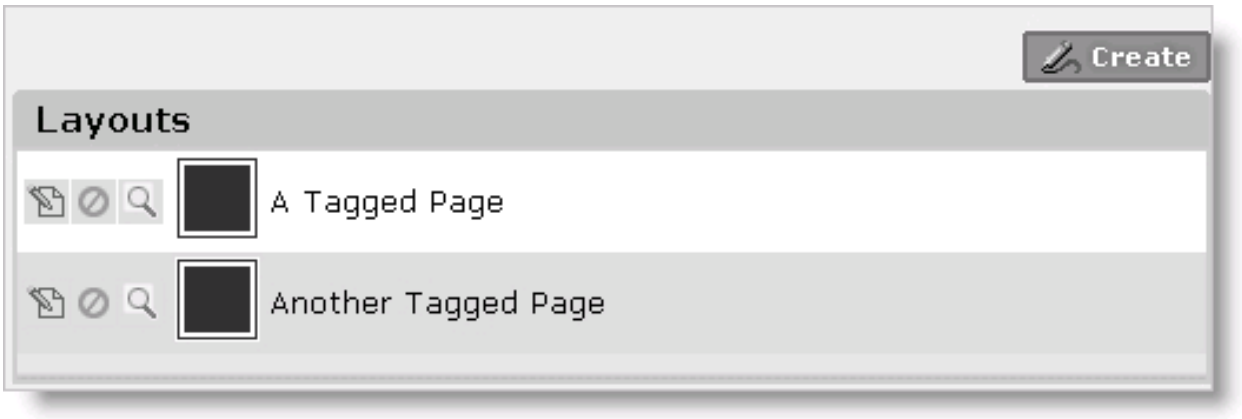
6. You should now be looking at the output from the Report Tags by Module form. Note which tags are in use - you might want to jot down a few tag names. You will be instructing your tagged pages to look for tagged content, and if you tell it to look for tags which are not in use, you will end up with a perfectly functioning but blank tagged page.
7. If you do not have any tagged content on the site you are using, you will have to tag some existing content records (or create some for practice and tag them).

Multiple Tags Selected for a Content Record

To find the Tagged Page Editing/Creation Form

By now, you have determined that you have at least some tagged content to use in your first tagged page. Time to get started. To find the tagged page editing form:

1. From the website part of the administrative interface, click on Tagged Pages.
2. Click on the Layouts link. You will see a list of existing tagged pages (if there are any).
3. Click Create.



Tagged Page Layouts

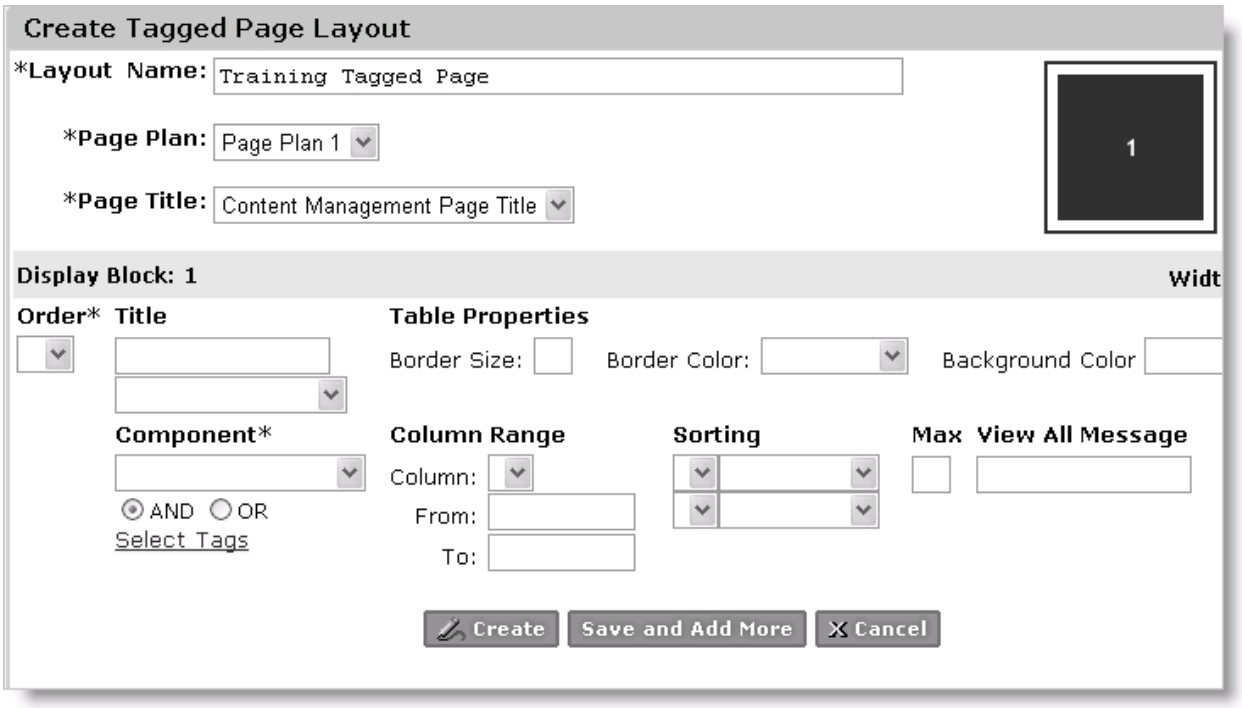
To create your tagged page

1. Fill in the information on the form, using the guidelines below.

- Template Name: What you want to call your page. If you are creating a practice page, type anything. If you are creating a page you will use on your site, choose a name.
- Page Plan: When you use the drop-down list to select a page plan, you are selecting one of the built-in layouts. For now, choose Page Plan 1, which is the simplest plan (one large display block takes up the entire page. When you select the plan, JavaScript completely redraws the page.
- Page Title: Enter one.

2. Click the Create button.

Your page should now look something like this:



Tagged Page Editing Form

Taking a First Look at the Tagged Page Form

After you create your new tagged page, the icon at upper-right shows you the basic lay-out of your page. It has one display block handily named “1”. The part of the form shown below is where you enter and add components to your block. If we had chosen a page plan with more blocks, you would just see more of these component editing modules, stacked up one after another.

Note: While this is the “world's simplest tagged page,” it has all the basic ingredients. When you build more complex pages later, for the most part you will just be adding more blocks and more components.

The Component Editing Section

The component editing section of the tagged page form allows one or more comonents in the numbered display block. As soon as you save one component, an empty editing mod-ule to add a new component will appear below it.

Component Editing Interface

You can also create your own components, but that's a subject for later. For now, use the standard built-in ones.

A component finds content records based on the tags that you associate with it in that “Select Tags” link. Then it displays the records inside the display block where you have put it.

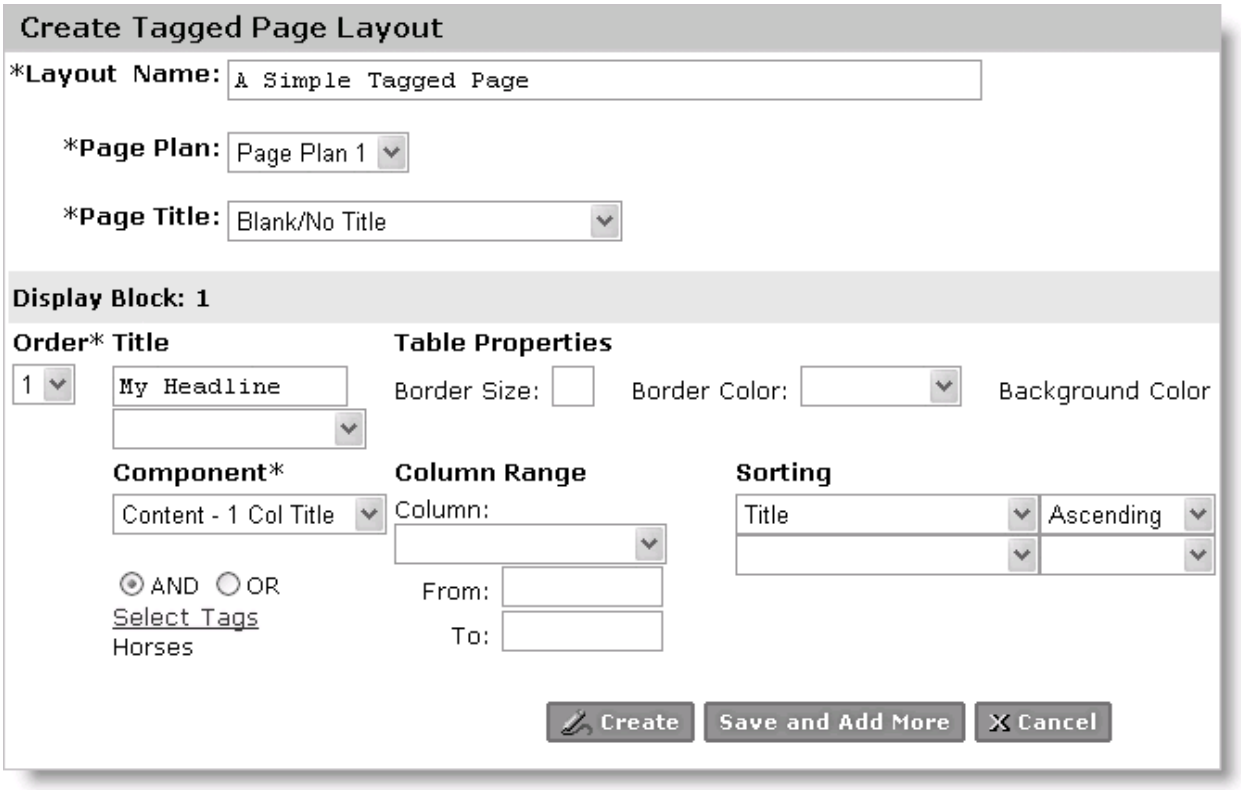
If you want to think about it this way, the chain goes something like this.

1. The user requests a tagged page
2. The tagged page “knows” how many display blocks it has and which components go in which blocks
3. The components know what sort of content they are supposed to look for (via tags) and how they are supposed to display it
4. When the blocks and components get together to form the page, the components are sent out to look for content
5. When the components grab their content and bring it back, the page is built “on the fly” and displayed to the user
6. Moving left to right on the portion of the form:

- Under “Title,” type in “My First Component” or anything else you like - this text will appear as a headline over the links your component builds.
- In the “Component” drop-down, select “Content - 1 Col Title.”

- Use the “Select Tags” link to select one tag for which you know there is some matching content in either content folders or a navigation menu. If you select more than one tag, you probably want to change the radio button to “OR,” or you will get only content which matches all your tags.
- Under order, select “1”
- In the two sorting drop-downs, select something (doesn't matter what).

7. Click the Create button.



Tagged Page Form Filled In

Previewing Your Tagged Page

You should now see your new tagged page in the list of layouts. To preview your page, use the small magnifying glass icon to the right of your layout's name.

No content?

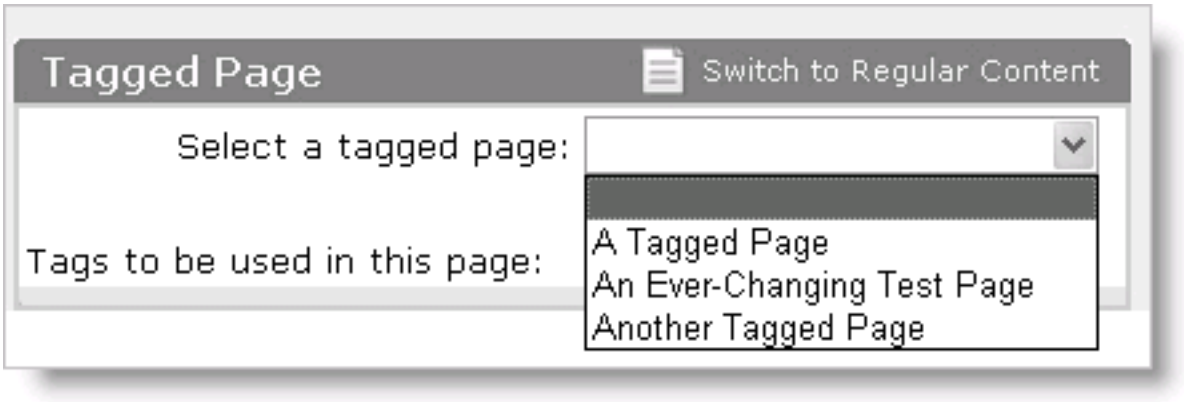
Your page shows up on preview, but has no content? Make sure:

- You did not select several tags and use “AND” in your tagged page design.
- There actually is tagged content matching your tags.

Inserting a Tagged Page in Content Record

If you are working on a practice site (for example, your development site) or creating a real tagged page for your live site you will want to insert your tagged page in a content record so you can see it from the front end.

1. In a newly created or previously existing content record, select the Switch to Tagged Page link. If you are using an existing content record, you will be warned that all previous content (HTML, etc.) will be deleted.
2. After selecting the Switch to Tagged Page link, select the tagged page you wish the user to see when viewing this content record on the front end.
3. Save, approve and publish your content record as you normally would.



Tagged Page window

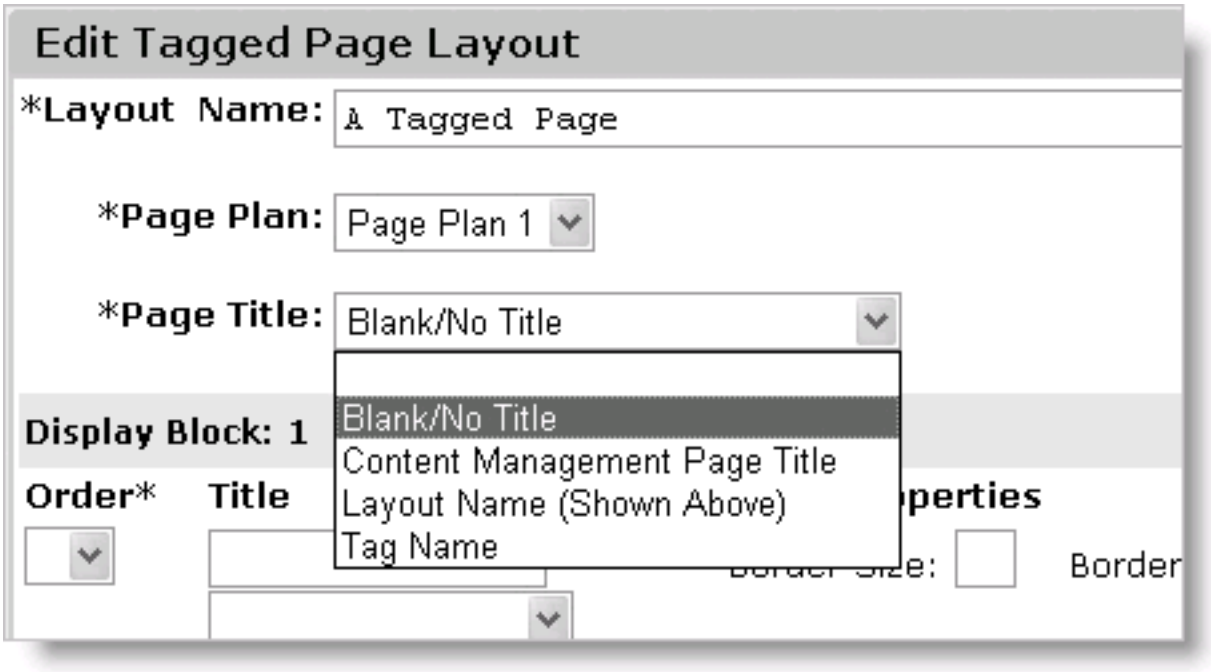
Note: Tagged components retrieve content records. They do not care where those records come from. They only care about how those records are tagged. Tagged components do not retrieve navigation menu items. They do not retrieve content folders. They do not retrieve individual pieces of content (such as an HTML file). Only content records. And a tagged component will look through all the content in your site for records with matching tags - in both navigation items and content folders.

Reviewing the Tagged Page Layout Options

Title Options

Below are the options you have for displaying a title on a tagged page. Here is what each option will show on the front end when you link a page into the navigation menu.

- Blank/No Title: As the name indicates, your page will have no heading on the front end (other than the headings you may have created for individual components).
- Content Management Page Title: The page will have a heading corresponding to the title of the content record which it is linked into. If it is linked into more than one content record, the name will vary depending on which content record the user is viewing.
- Tag Name: The page will have a heading corresponding to the tag added at the link. Will not display anything if you add multiple tags at the link.
- Layout Name: The page will have the template name (in this example “A Tagged Page”) on the front end.



Tagged Page Title Options

Order Drop-Down List

The order drop-down list specifies the vertical order within a display block (the rectangles that divide the page layout) in which records retrieved by different components will be displayed.

In other words, in a display block with five components, the records retrieved by the component with order number 1 will appear on top. Records retrieved by the component with order number 2 will appear beneath number 1 and so on.

Every time you save the editing form for a page, the order numbers:

- Must be selected for each component.
- Must not duplicate each other (you can't have two component 4's)
- Must not contain any gaps (you can't save 1, 2, and 4)

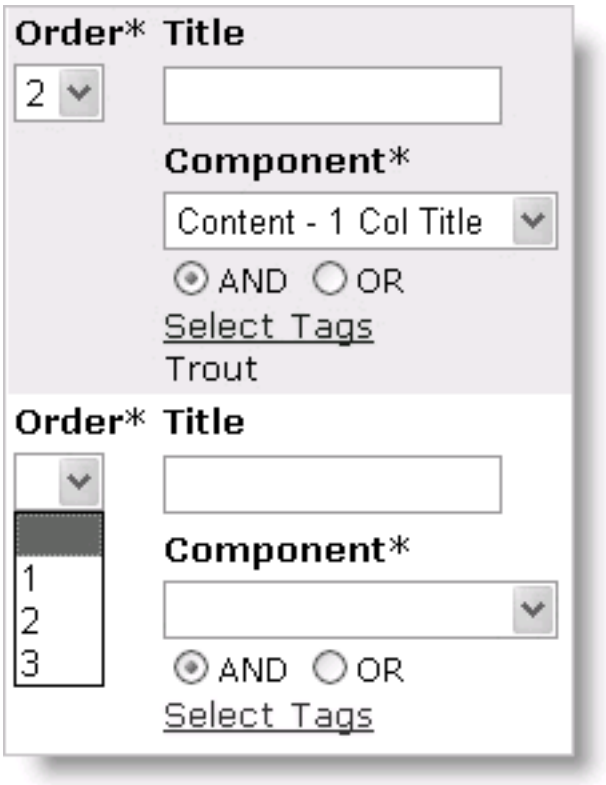
Each time you save a new component, the order list will be updated to include a new number for the next component you might want to insert (in other words, after you save your second component, the list will read 1,2,3).

Re-Ordering Components

You can change order numbers to re-arrange the display order of your page, but if you do so, you must make sure that you do not select duplicates (for example give two different components number 3). It will not break anything, but you will get an error message and e-CM will not save your changes.

When you do change order numbers, the components will be re-sorted in the editing interface after the page re-loads (lowest numbered component on top).

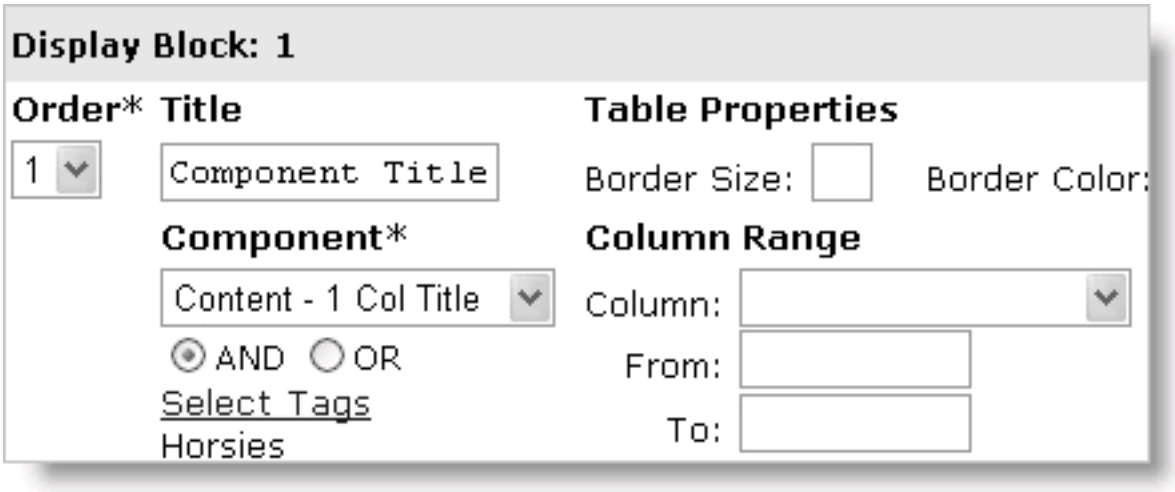
When you delete a component, you must re-select the orders for the rest of the components before you delete (in other words, if you are deleting component 3 and there are four components, you must re-number the components which will not be deleted 1, 2, and 3.



Order Drop-Down List

Component Title

The component title (which is optional) simply displays a headline over whatever content is retrieved by the tagged page component (if no records are retrieved, the title is not displayed unless you check the req box on the far-right margin of the form).



A Component Title Entered

A Component Title, Front-End View

Using Graphics for Titles

One non-obvious feature of tagged pages is the ability to use graphics in place of text component titles.

In order to enable this feature, you must create a sub-directory of your Images directory called “TPImage” (a special name that tagged pages look for) and use the Image Manager to upload one or more gif or jpeg images to that sub-directory.

To create and populate the TPImage Directory

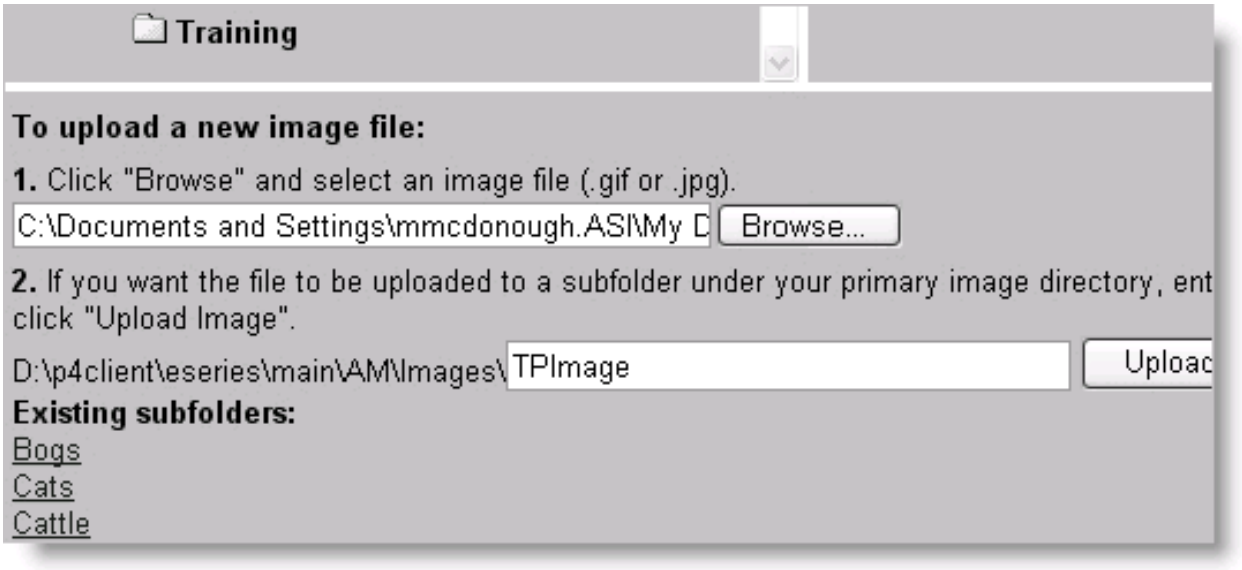
To create the TPImage directory, you will need to use the image manager, which you can do either by clicking on the Sites button in the Websites portion of the administrative interface or from within any HTML file in a content record by clicking on the image button in the WYSIWYG editor's top bar.

Once you have the image manager open do the following:

1. Browse to an image you wish to use as a tagged page title (or a test image - you can always delete it later).
2. Enter TPImage in the folder text input to the left of the Upload Image button.
3. Click the Upload Image button. When you click Upload Image, the image manager will

both create the directory and upload your image into it. After a pause, the file will be uploaded and will appear in the upper-right pane.

Note: There is no need to click OK or Cancel. If you click Delete, the file will be deleted. You may now upload additional images to the directory.

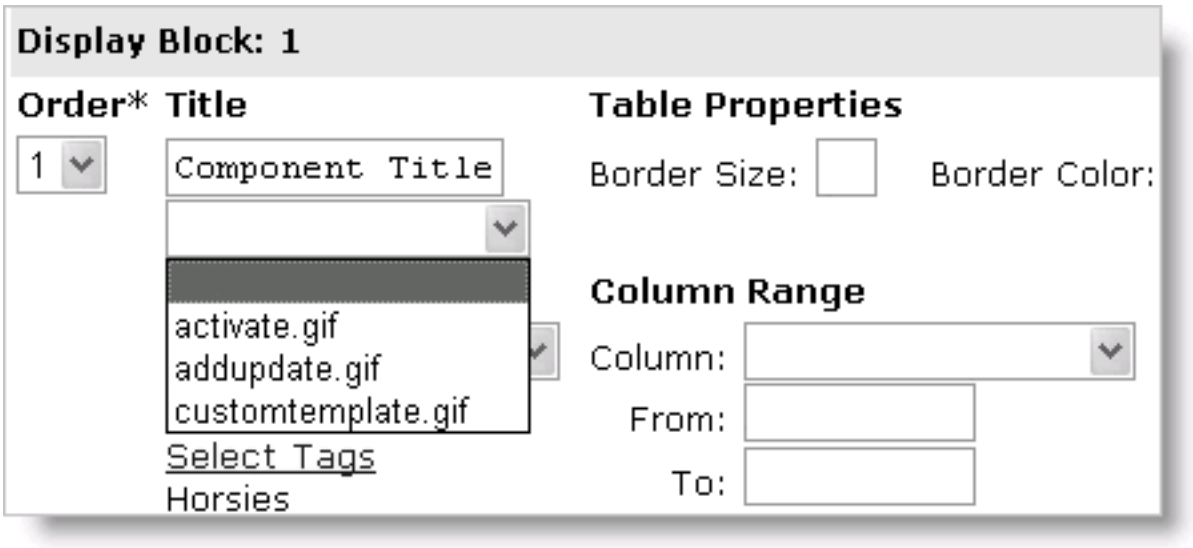


Preparing to Create and Populate the TPImage Directory

To use title images in tagged page designs

Once you have created and populated the TPImage directory, you may use images in the TPImage directory in place of simple text titles in your tagged pages.

When you next go back to the tagged page editing interface, you will see a drop down below the Title input box for the component title.



Title Image Drop-Down List

If you want to use a text title on your component, simply enter it as usual and do not select and image from the drop-down list.

If you want to use an image:

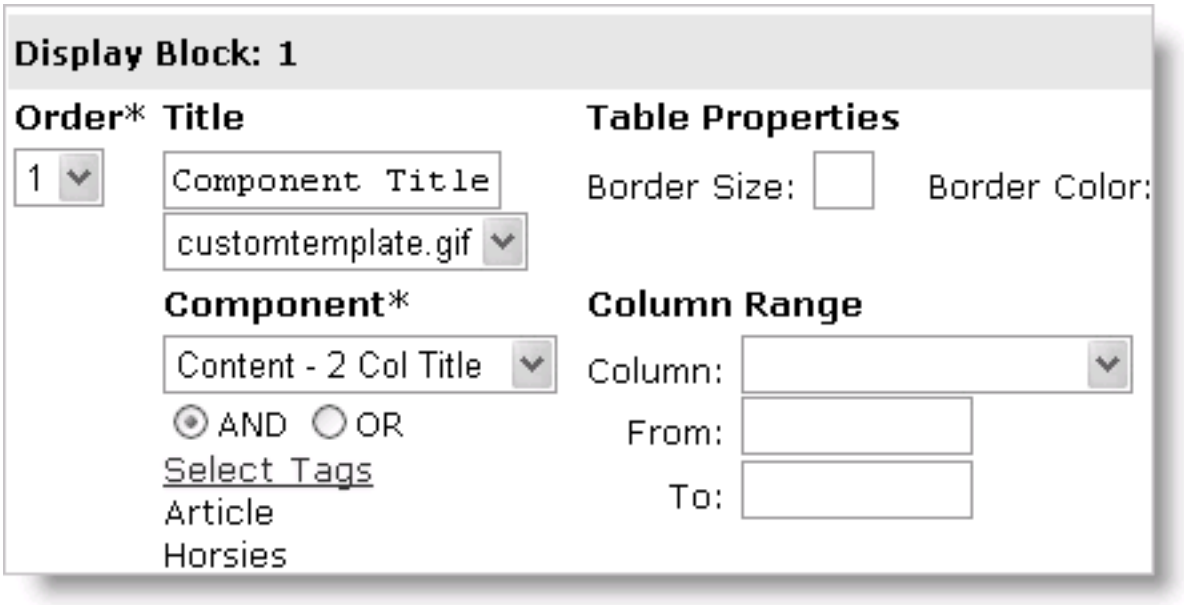
1. Enter a text title; this will become the alt ("mouseover") text for the image.
2. Select a file from the drop-down list.
3. Save your work. The title image will display over any content retrieved by the component.

Note: Since you will see the filename in the drop-down list, it makes sense to give your files names that will mean something to you before you upload them (you cannot rename a file once you have uploaded it). If you are looking at the title image drop-down, "logo.-gif" is going to make much more sense than "x234EP.gif."

And vs. Or

If you use multiple tags with a particular components, you can either chose an "And" relationship or an "Or" relationship between the tags by selecting one of the radio buttons. In this example, if you selected "And" (which is the default), the component would retrieve only content records tagged to "Horsies" and "Articles." If you select "Or," it will find con-

tent records tagged to “Horsies” or “Articles.” In general, you use “And” to narrow your retrieval criteria and “Or” to make them wider.



Multiple Tags with "And" Selected

Border Size, Border Color and Background Color

To the right of the component title are a set of form inputs which can be used to place a visible HTML table around the content which is retrieved by the component. There are no absolutes in graphic design, but these are probably best used to set off relatively small elements (for example a list of the 4 latest news articles or a short piece of HTML) in relatively complex pages.

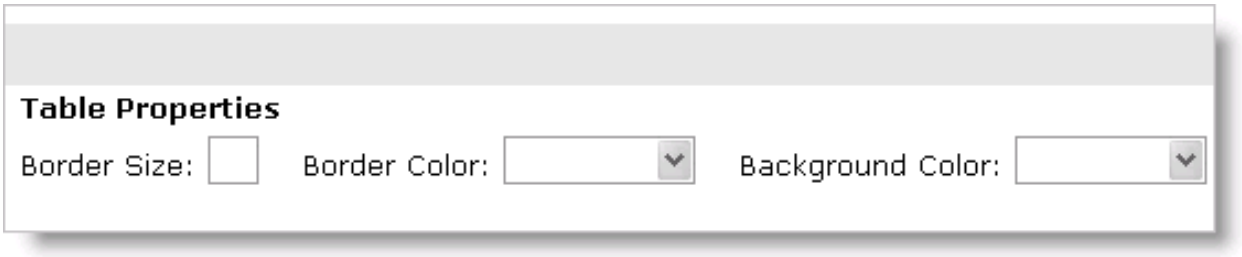


Table Properties

To create a table around the output from a particular component:

1. Enter an integer as a border size (1 is a good starting point).
2. Use the drop-down list to choose a border color.
3. Use the drop-down list to choose a background color.

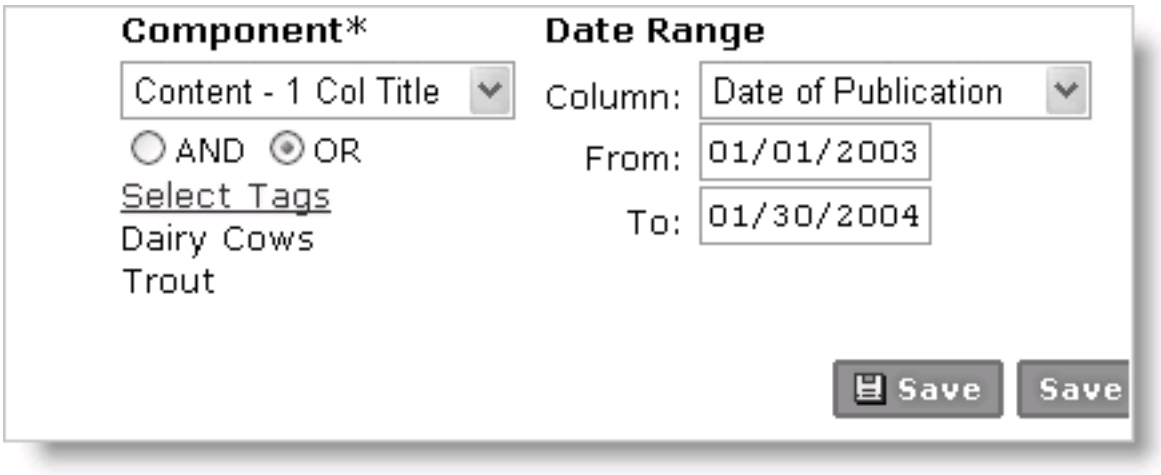
   You may use a border without a background, or a background without a border, but if you use a border, you must choose a border color.

   Note: These colors are stored in a table called Tagged_Page_Color_Ref.

   Specifying a Column Range

   The column range functionality, which is found beneath the table inputs, allows the user to select a particular range of dates (in mm/dd/yyyy format) to filter the records retrieved by the component.

   For example, you could use this feature to create a page that listed news releases by month, using a separate component for each month.



   Date Range

   To specify a date range for a particular component's output:

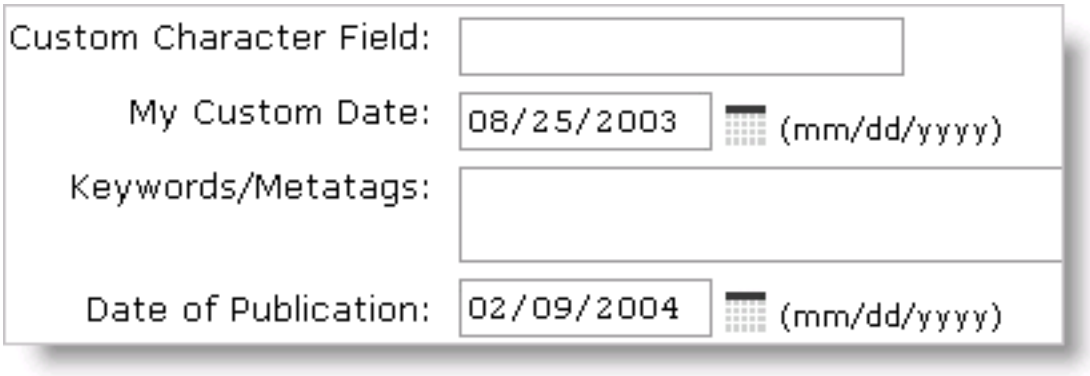
1. Select a date field to filter by from the Column drop-down list (more about that in a second).

2. Enter a From date (a beginning date) in mm/dd/yyyy format.
3. Enter a To date (an ending date) in mm/dd/yyyy format.
4. Save your work.

What Date?

The most obvious question about filtering content records by date is “What date?” Two dates end up in the column by default. The first is “Date of Publication,” which you can enter for each content record in the content record properties field. The second is “Published Date Time,” which is simply the last date on which the content record was published. Since this may have nothing to do with the actual date associated with the content and will be re-set every time the record is re-published, you would not generally use Published Date Time except in unusual circumstances, for example if a custom automated process was publishing your content and the Published Date Time was actually meaningful.

In addition any User-Defined Date fields you have enabled to work with tagged pages will appear in this list. User-defined fields can also be entered on the content record properties page.



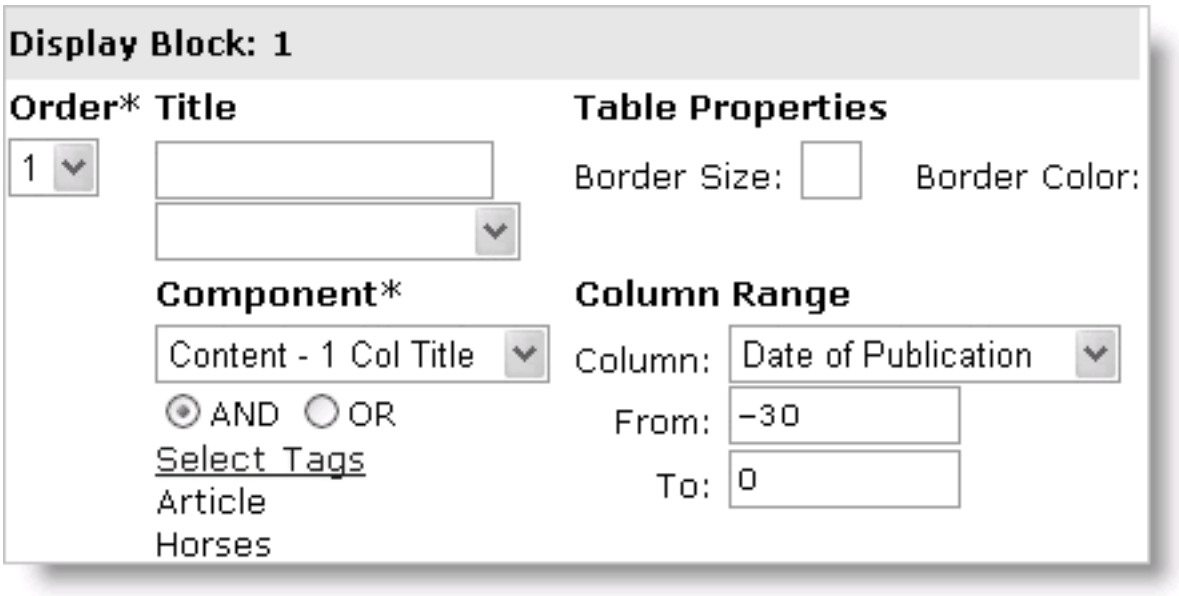
Date Fields in a Content Record Properties Page

To create a Rolling Date Criteria

To create a rolling date criteria (for example “Date of Publication” in the last 30 days):

1. Select a date field to filter by from the Column drop-down list.

2. Enter a From date (a beginning date) in the format “-n” - for example, if you want to create a rolling criteria of the last 30 days, you would type “-30.”
3. Enter a To date (an ending date) in the same format (using zero if you want the ending date to be today).
4. Save your work.



Specifying a Rolling Date Criteria

To show only future dates

Imagine that one of your tagged pages will show courses and you are using a user-defined field to enter the date on which the course will be held. You want the tagged page to show only courses that are in the future, not courses that have already run. To show all future dates:

1. Select the date you want to filter by in the Column drop-down.
2. Enter “0” (zero) as the From: and leave To: blank to display records matching today's date and in the future OR
   Enter “1” as the From: and leave To: blank to display records starting with tomorrow's date.

To show all past dates

If you want to show all records matching a past date:

1. Select the date you want to filter by in the Column drop-down.
2. Enter “0” (zero) as the To: and leave From: blank to display records matching today's date and in the past OR
   Enter “-1” (note the minus sign) as the To: and leave From: blank to display records starting with yesterday's date and all past dates.

Sorting the Records Retrieved by a Component

The “Sorting” drop-downs, to the right of the Date/Column range area, allow you to sort the records retrieved by the individual component. You have a choice between several “built-in” fields such as content record title and any user-defined fields you have activated for use in tagged pages.

You may specify a primary and secondary sort criteria (for example, if you are sorting a collection of press releases by date, you may wish to sort them by title if they have the same date).

The drop-downs also give you the ability to sort in ascending order (A-Z) or descending order (Z-A). In the case of sorting by date, you will most often want to use descending order - most recent dates on top.

To show Max and View All Messages

If there are multiple components on a page which could generate long lists of records, you may wish to display only the first few records and then give users a link that will take them to the rest of the records retrieved by the component.

In this case, you can specify both a number of records to show and the text for the link to more records in the View All section of the tagged page form. In the example shown below, the component has been told to show only 1 record, and then a link titled See More to the rest of the records it retrieves.

Max/View All

If you specify, for example, a maximum of 3 records and the component only finds 2, it will not display the link (since there are no more records to see). Somewhat less intuitively, the feature will simply be ignored unless there are at least two components on the page.

Note: View All can be used with any component on a page, but it will not work until there are at least two components on the page.

To add “ViewAll” Images

You can also use images in place of the text View All messages by setting up a directory with the special name View All underneath the “TPImage” directory. To do this, input the directory name “TPImage\ViewAll” instead of “TPImage.”

Once the ViewAll (note lack of spaces in name) exists and is populated, the image(s) will appear as a drop-down list below the View All Messages form input. The feature looks and works just like the graphical title feature.

Req and Del

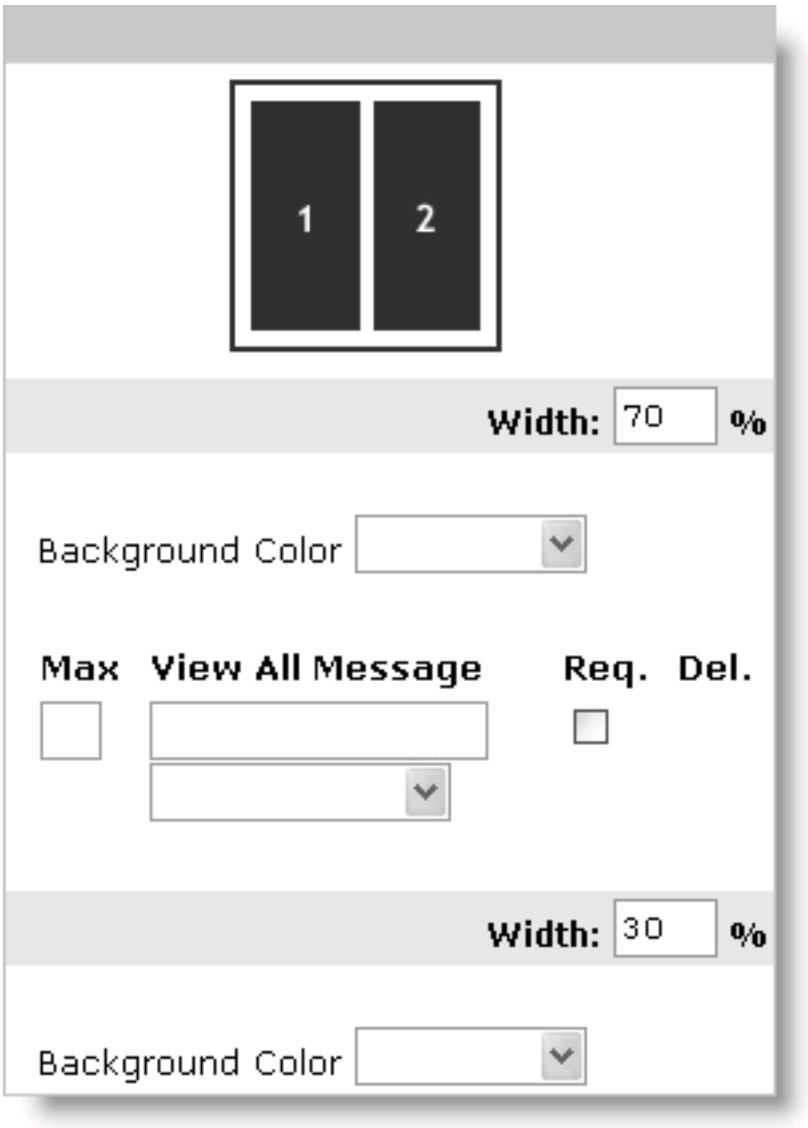
The small Req and Del checkboxes are located at the extreme right-hand edge of the form. One set of checkboxes appears for each component.

- The Req checkbox will show the component's title text or image even if the component retrieves no records. It is used primarily during page editing and setting.
- The Del checkbox will delete the component for which it is checked. If you are deleting any component except the last one on a page, you will have to remember to change the “order” numbers first so that the remaining components will be in the proper sequence with no gaps in the numbering.

Specifying a Block Width

If you are using Page Plan 1, which simply has one large block, block width is irrelevant, since the one block will take up your entire page.

However, if you are using a more complex page design with multiple blocks, you can use the Width setting on the far right side of the form to specify what % of the page is taken up by each block. In the example below, illustrating Page Plan 3, block number 1 has been set to take up 70% of the page and block number 2 30%.



Specifying Block Widths

Save vs. Save and Add More

There are two buttons at the bottom of the tagged page form, Save and Save and Add More. Both buttons will save your work, but Save will take you back to the list of tagged page layouts (for example, so you can preview your page). Save and Add More will save your work and reload the form, allowing you to continue editing your page.

Re-Using Tagged Pages

Very often you want the website user to see several essentially identical tagged pages with an identical design. One way to do this is to create absolutely identical pages and set them to look for different tags. Sometimes, depending on how your content is tagged, this may be the only way to do things. But often, you can create one page, insert it in your navigation at several different places, and give it instructions in each place which result in it displaying different information in exactly the same format. This way, you only have to create one tagged page, and if you decide to change your page design, you only have to change it in one place, instead of updating several identical pages.

By way of illustration, imagine that you want to display four basically identical pages of links to press releases. Each page should display in the same format, but show press releases related to a different subject area.

Each content record containing a press release will have two tags: “Press Release” (describing the type of content) and an additional tag describing the subject area.

In our example, let's say your four subject areas are:

- Legislative Issues
- General News
- Events
- Industry News

If you wanted to re-use a single tagged page, you would first create a page whose only instruction was to look for everything tagged to “Press Release.” If you view this page in preview mode, it will show every press release on the site, regardless of subject area.

However, when you insert the tagged page into a content record in your navigation, you will insert an extra tag in the content record.

To do this:

1. After inserting your tagged page in a content record, click the Select Content Tags link below the tagged page drop-down list.
2. When the Content Tags window pops up, select your additional tags and click Save and Close.
3. The additional tags will now appear under the tagged page drop-down, and the link will change to Modify Content Tags.

Tagged Page in Content Record

Additional Tag Applied

Any additional tags you apply in this manner at the content record level will have an “AND” relationship to the tags you have told your components to look for on your tagged

page. In other words, if we add “Legislative Issues” when we place the press release page in a content record, users who look at the tagged page here will see only records tagged to “Press Release” AND “Legislative Issues.” Now we could put this page somewhere else entirely, perhaps in a completely different navigation item in a different part of the site and add the tag “General News,” and users will see exactly the same page design, but only those items tagged to “Press Release” and “General News.” And, yes, if a press release is tagged to both “Legislative Issues” and “General News”, it will show up on both pages.

Managing Your Tagging Categories

This section of the training is designed (even more so that usual) to be used as a self-study guide, since it's been our experience that by this point in the training most people have absorbed about all the information they can without a rest! And besides, once your tagging categories are set up, you may go for months without having to edit or change them.

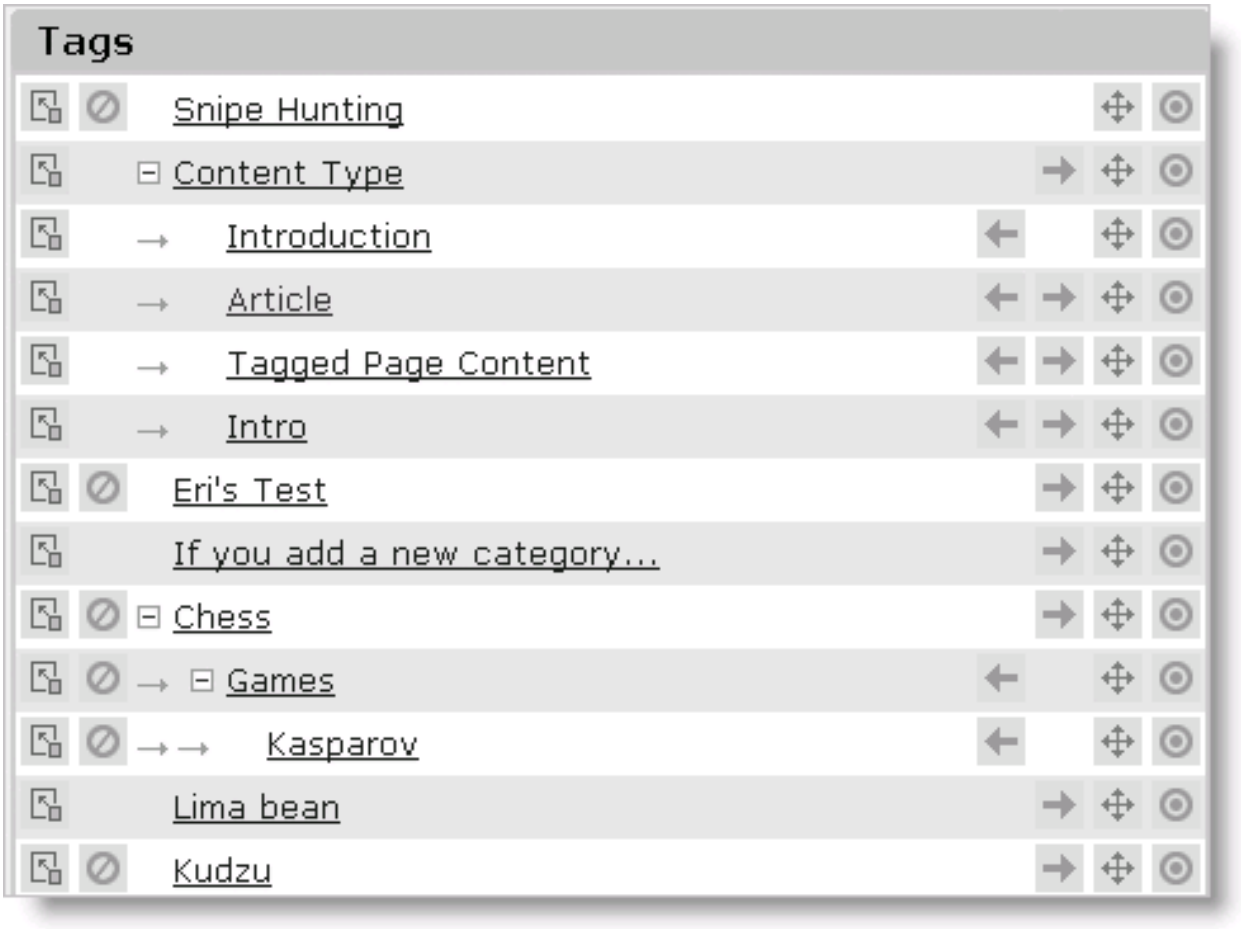
Some customers have tagging categories 100% fixed before they begin using tagging; others start with a basic set of tags and expand them as they go. Wherever you fall on that continuum, it is useful to know how to manage and modify your categories.

Looking at Your Tagging Categories

If you've entered tagging categories already, you probably already know where to go to find the list of categories, but just in case, when you click the Tagging Categories button on the administrative interface, you will see the list of categories. From this list, you can add, delete, and modify categories. You will find it works much like the Navigation Menu Item interface.

- You click on the name of an item to modify it.
- You can promote, demote and move items.
- You can expand and collapse either individual “trees” with the plus and minus buttons or the entire page (via Expand All and Collapse All links that the bottom of the page.

- You can delete categories with the delete button.
- You can insert items with the insert button.



Tagging Category List

Tagging Category Levels

One of the first things you'll notice about the list of tagging categories is that they are organized in parent-child relationships, just like folders and navigation menu items.

With one important exception, this organizational scheme of parent categories and child categories is for your own convenience. From the point of view of tagging content, a tag is a tag is a tag. Tagging a content record with a “parent” tag, for example, does not automatically tag it with all the children of that tag. Neither does tagging a content record with a “child” tag automatically tag it with the parent.

Each tag operates completely independently. If it is appropriate for your information structure, you can have two child tags with the same name. For example, you might have a parent category called “Audience” and a parent category called “Events” and both might have a child category called “Students.” The first “Students” tag would be used for content which had students as the intended audience, and the second would be used for content related to events for students.

Level-One Tagging Categories Must Be Assigned to a Module

If you've been setting up your own tagging categories, you may have already done this:

- You create a new “level-one” tagging category by using the insert button.
- You add a child tags under the new level-one.
- You go to tag a content record and your new tagging categories don't show up.

Why is this? Because you need to assign them to a particular module (for example, e-CM or Event Manager) before they will actually be available for tagging in that component.

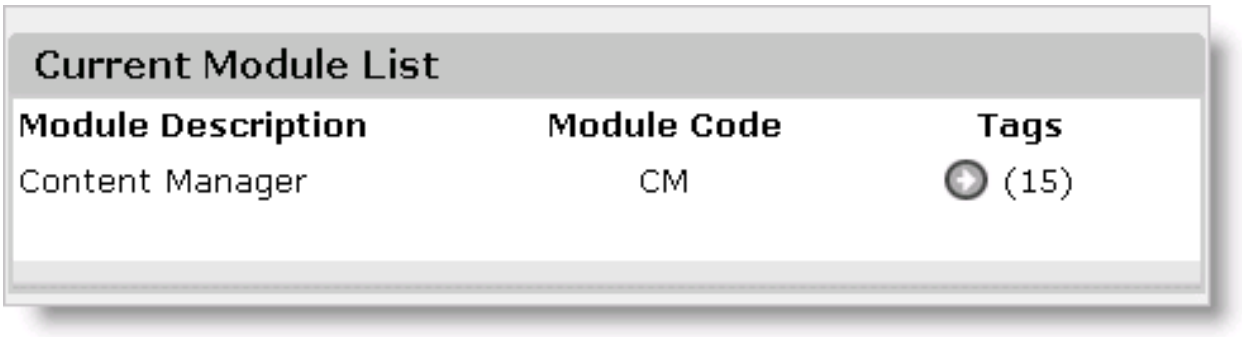
Remember that this has to be done, rather than try to memorize all the details of doing it.You probably won't need to do it all that often, and you can always look up the details.

To assign Tagging Categories to a Module

Before you can use a level-one (main) tagging category or any of its children with Content Manager (or any other taggable modules you may have purchased), you need to associate that category with the application.

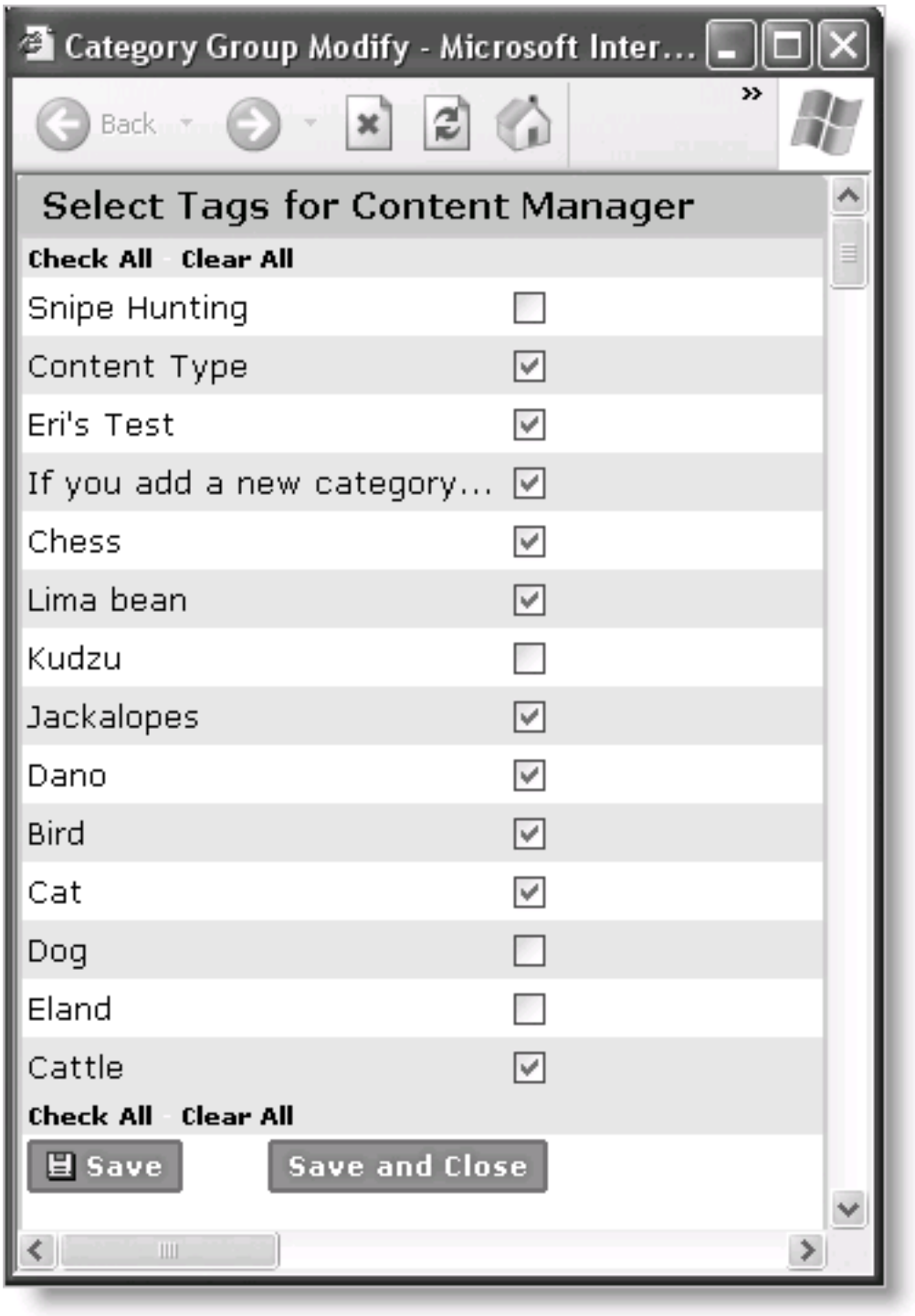
1. After logging into the administrative interface, click on the Tagged Pages button.
2. Click on “Modules.”

In this example below, e-CM is the only active taggable component. If other modules such as Event Manager were active, they would also appear in this list.



Module List

3. Click on the arrow button to the right of “Content Manager”.
4. A window will pop up showing all the level-one tagging categories
5. Select any additional level-one categories you want to associate with CM and click the Save button.
6. When the warning screen pops up, click “OK” (the warning applies to un-selecting categories, not adding them).



List of Level-One Tags

To remove a Level-One Tagging Category from a Module (Be Careful!)

You can also de-associate a group of tagging categories from a particular module by following all the same steps and then un-checking the level-one tag(s) you wish to remove and clicking Save. This will remove the tagging category and all of its children from the list of tagging categories in the module. It will also un-tag any items which have been previously tagged with any of the tags you are removing.

Note: If you remove a level-one tagging category from a module, it is important to understand that this will not only remove the tag and its children from the tagging window, it will also un-tag any content records which have previously been tagged with the level-one or any of its children. For this reason, it is extremely important to make sure that you think carefully about what you are going to do.

Here's a worst-case to illustrate the issue (and yes, this actually happened). Let's say all the most important pages on your website are tagged pages and your site's homepage also is driven by tagging. A site administrator goes to the module list, selects e-CM, and unchecks every level-one tag on the list and then clicks Save.

At this point, every content record in e-CM is now un-tagged. Because tagged pages are cached in memory, nothing bad happens immediately. However, the next time the pages expire from the memory cache, the homepage and most of the website suddenly becomes a collection of blank pages. You will now discover how good your hosting company (or internal IT department) is at making back-ups and doing quick restores (in the case of this user, the hosting company did excellent back-ups and was able to restore the database within about 10 or 15 minutes, at which point the website re-appeared).

Because of the high stakes involved in removing level-one categories from a module, the warning that pops up when you try to do this is particularly frightening. Do not worry. If you know what you are doing and you really need to do it, go ahead. But definitely take a minute to think before you click OK.

Now that we are through the warnings, here's how to remove a level-one tag and its children from e-CM:

1. From the modules interface, click on the arrow button to the right of Content Manager

2. A window will pop up showing all the level-one tagging categories
3. Un-check any level-one categories you want to remove from e-CM and click the Save button.
4. When the warning screen pops up, take a very close look at the tag(s) you have un-checked, and if you are confident that your choices are correct, click OK.

Searching for Tagged Content

To find tagged content

To see what pieces of content have been tagged with which tagging categories:

1. After logging into the administrative interface, click Tagged Pages.
2. Click Report Tags by Module.

You should now see a search form.

Tagging Category Search Form

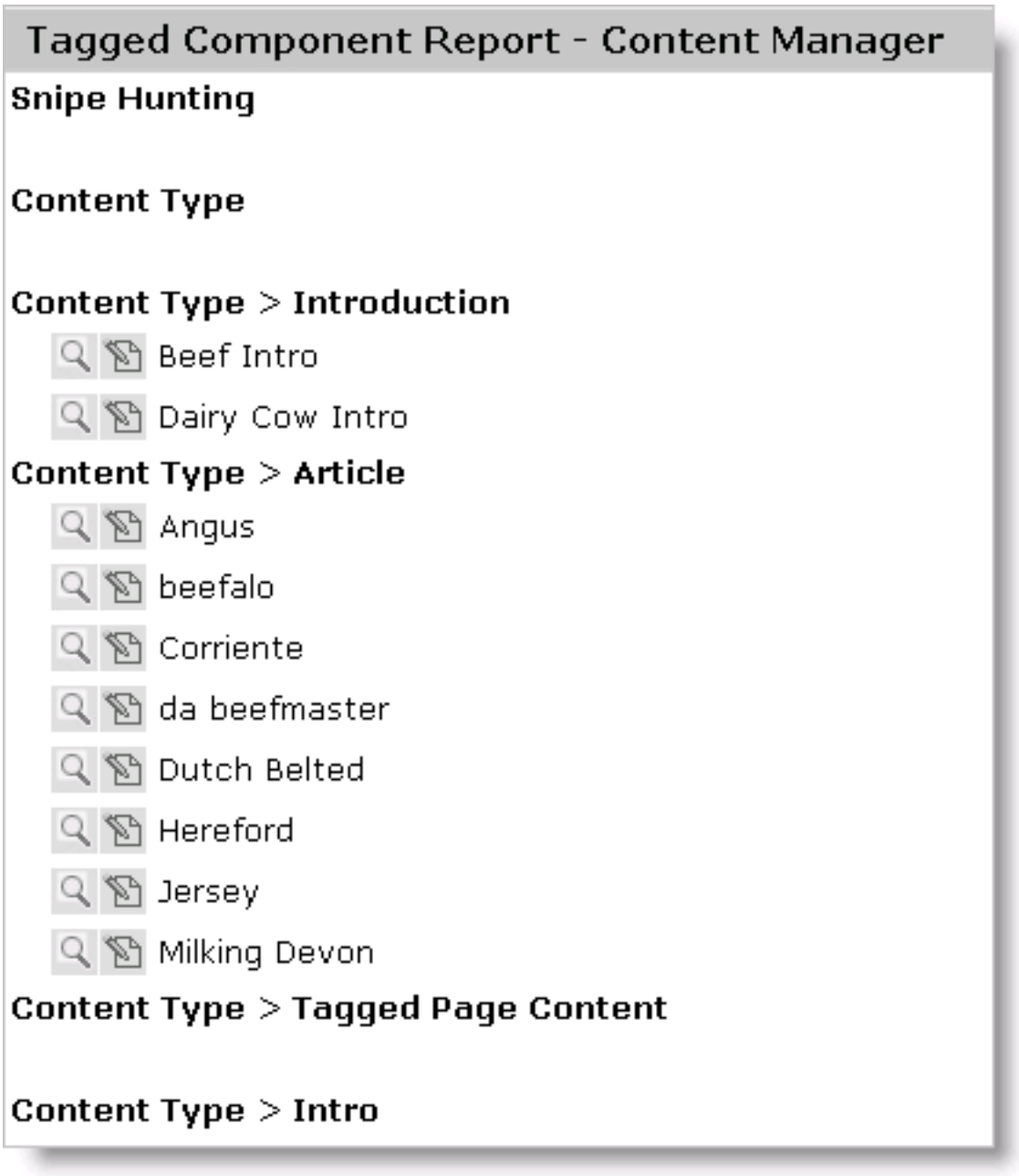
To Get a Complete Report of All Tagged Content in a Product

If you want to see what content has been tagged in a particular product:

1. Make sure Content Manager is selected in the Component drop-down list.
2. Click the Submit button.

   You will now see a report listing all tagging categories and then all content tagged with that category. Next to the name of each content record (or product, or event - depending on which component you are looking at) you will see a button with a graphic of a magnifying glass that allows you to preview the content and an edit button with a pen and paper graphic, which allows you to edit the content (assuming that you have the proper permissions to do so).

   Clicking the Exclude tags with no associated content checkbox simply tightens up the output by omitting the listing of any tags which aren't being used.



Sample Output from Search Form

To Get Information on Specific Categories

- If you want to find out which content records have been tagged with a particular category, you go to the same form and select the tag (or tags) you wish to find out about.

- If you want to select more than one tag, you can use hold down your control key while clicking. By holding down your shift key while clicking, you can select a range of tags.

  If a content record is tagged more with more than one tagging category, it will appear more than once on the report - once for each category.

  Creating a New Tagging Category
  To create a new tagging category

1. After logging in to the administrative interface, click on the Tagged Pages button on the administrative menu.
2. Click on the Tags link.
3. Use any of the insert buttons on the list of tagged pages.
4. Enter the name of your new tag in the Name box on the form.
5. If you wish, you can add a description (this is strictly for your own information).
6. Click on the Submit button to insert the new tag. It will become the first level-one tag at the top of the list.

Add Tagging Category Form

Moving, Promoting and Demoting Tagging Categories

The most important thing to remember about moving, promoting and demoting categories is that if your category ends up in the wrong place, you can always move it again.

To move a tagging category

1. After logging into the administrative interface, click on the Tagged Pages button.
2. Click on the Tags link to show the list of tags.
3. You can now use the move ( ) and target ( ) buttons to move a tagging category.

- Click the move button to the right of the tagging category you wish to move.
- Click the target icon to the right of the category you wish to move it underneath. When you click target, the category will become the next item in the list at the same level as the target.

Remember, if you don't like where your category ends up, you can always move it using the move and target buttons.

To Promote or Demote a Category

To promote or demote a tagging category use the promote ( ) and demote ( ) buttons on the right side of the list. Clicking the promote button to the right of a category's name will move it up one level. Clicking the demote button to the right of a category's name will move it down one level.

Note that level-one categories to not have a promote button (because you can't promote them any higher - there is no level beyond one). Also, if demoting a category would make it an “orphan” (no direct parent), it will not have a demote button.

How to Change the Name or Description of a Tagging Category

To change the name/description of a tagging category

1. After logging into the administrative interface, click on the Tagged Pages button.
2. Click on the Tags link to show the list of tags.
3. Click on the name of the tag you wish to edit.

4. When the form appears, make your changes and click the Submit button.

Deleting an Unused Tagging Category

You probably won't have to delete tagging categories very often (because un-used categories don't really hurt anything), to do so:

1. After logging into the administrative interface, click on the Tagged Pages button.
2. Click on the Tags link to show the list of tags.
3. Click the delete button to the left of the tag you want to delete.
4. When the confirm message asks you if you are sure you want to delete the tag, click OK. The page will refresh and the tag will be removed from the list.

   If you want to delete a parent category without deleting the children, you should promote the children (or move them to a different parent) first.

   If even one content record (including an archived record) makes use of a tag, the delete button will not appear next to it. If you wish to get obsolete tags out of your way, but find you cannot delete them at present, you can create a parent tagging category called “Unused” and make all your unwanted tags children of that tag.

Advanced Tagging

Many customers quickly learn to “push the envelope” when it comes to implementing tagged pages. For this reason, we thought it might be useful to have some additional documentation on tagged pages, and how they are employed. This chapter assumes that you have a basic understanding of tags and tagged pages and have at least a little experience with designing tagged pages. It does not attempt to explain every possible thing you might do with tagged pages, but lays out some basic ground rules and explains the processes involved.

Specifics of Applying Tags

Tags Can Be Used in Three Different Places

One of the things that makes the process of tagging a little confusing at first is that there are three different places you can use tags, and they do something a bit different in each

place. Below summarizes the different locations where you can use tags.

Content Record	Associates content with a tagging category so it can be retrieved and displayed by a tagged page. Serves the same purpose in a variety of components (for example, in Event Manager, you can tag an event, in the Online Store you can tag a product, etc.).
Inside a Tagged Page	In a tagged page, each tagged page component (the little data-gathering engines that retrieve and display the content) typically is associated with one or more tags. This tells the component what sort of content to retrieve.
Associated with a Tagged Page Link	Tagged pages are displayed by linking them within a content record inside a navigation item. When you create this link in a content record, you have the option of adding additional tagging categories which will apply to the tagged page only at that specific location. They have the effect of adding an “and” to whatever tagging categories are applied to the tagged page components on the page.

Applying Tags at the Tagged Page Link

Because the process of applying tags at a tagged page link is a little complicated, first we are going to explain the “how,” then the “why.”

When you want to display a tagged page on the front end of the website, you link it to a specific content record, by clicking the Switch to Tagged Page button and then selecting a tagged page from the drop-down list.

Tagged Page Link Before Saving

Once you have saved a content record containing a tagged page, you can apply further tags by clicking the Select Content Tags link (which will not appear until you have saved the content record at least once).

Tagged Page Link with "Select Content Tags" Link

When you click the Select Content Tags link, the familiar tagging category list window will pop up, and when you click Save and Close, any tags you have selected will appear after the link:

Tagged Page Link with Tag Selected

Why You Would Apply Tags at a Tagged Page Link

We have covered how you apply tags at a tagged page. We will next talk about the “why.” When you apply additional tags at the tag page link, they have the effect of adding an “AND” to any tags that are present on the tagged page. Every single component on that

tagged page will look for any tagged records matching both the criteria set in the page design and the tag(s) you add at the link level.

This ability apply tags at the tagged page link is generally used to narrow the retrieval criteria of a fairly general tagged page design. This allows you to use a single page design in multiple places.

For example, imagine a website with five major subject-area-based sections (e.g. “Legislative Issues,” “Regulation,” “Industry News,” etc.). You want to create a News page for each one which will feature an HTML introduction at the top and a list of press releases underneath.

One way to do this is to create a separate news tagged page for each section, using the specific subject-area tags in each design.

However, this means that you now have five separate tagged page designs to create and maintain, and any changes you want to make in the future will have to be done five times.

Example Tagging Categories

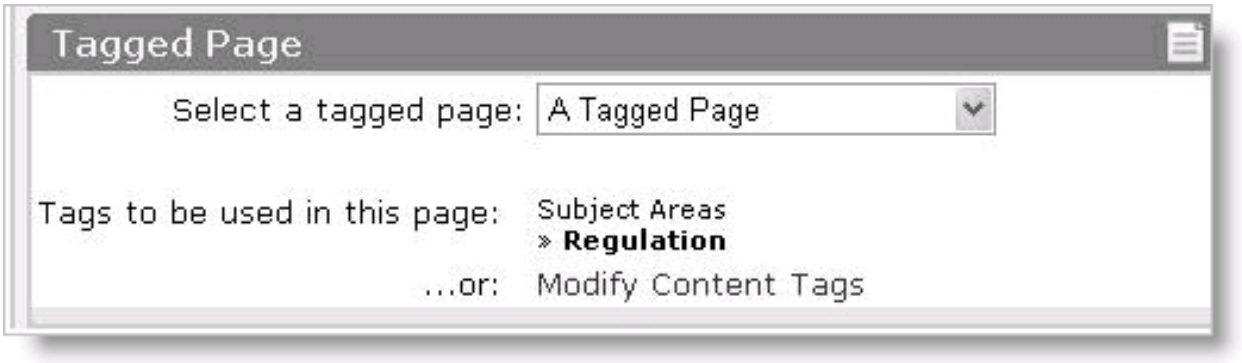
Another way to accomplish the same thing is to create one page which in its “raw” state will retrieve all HTML introductions for news pages and all press releases and then add in a subject-area tag to filter the output when you link the page into each navigation item.

Your page design (to keep the example simple) would then have a full-HTML custom component at the top which would look for all records tagged to “News Introduction” and a custom or standard component showing links to all content records tagged to “Press Release.”

Example Page Design

If you use the preview button to look at this design, you would see five HTML introductions at the top, followed by a list of all press releases on your site.

When you link this page into the proper navigation item for the “Regulation” news page, you would add the “Regulation” tag at the link in the specific content record holding the tagged page link. This will “filter” the output of the tagged page to show only items tagged to “New Introduction” and “Regulation” (you would have just one such content record) followed by a list of links to press releases tagged to “Press Release” and “Regulation.”



Tag Added to Filter Output to "Regulation"

Since re-using pages this way requires your content records to be tagged in a very specific way, it does require some thinking ahead and may require you to add some new tagging categories, but it saves work and ensures design consistency.

Using Components to Display Information from Other Modules

The process of using tagged components to display information from other modules is very similar to displaying content records from e-CM, but there are a few things you need to know first.

How to Activate Tagging for a Particular Module

Typically, a particular module (e.g. Event Manager) will be activated for tagging during your website's initial configuration. There is no interface for activating a module. Doing so requires database access. Under the assumption that a user with database access will be technically sophisticated, we will keep the explanation at a high level.

To activate tagging in a particular component

1. Find the row corresponding to the module in the Component_Ref table.

2. Set the value of the TaggableFlag column to “Y.”
3. In the website's administrative interface, click the Admin button at the top of the page.
4. Click Reset Server Variables on the left side of the Admin section.
5. Click the Reset Variables button.

Associating Tag “Families” With a Module

Before you can display, for example, products from a store in a tagged page, the products have to be tagged, and before any items in the module (for example, events in Event Manager) can be tagged, you need to associate one or more “tag families” (a level one tag and all of its descendants) with that module. No module (including Content Manager) is associated with all tag families automatically.

Creating Custom Components

You might have wondered where the components in the “Component” drop-down list actually come from. Wonder no more. That list contains some standard components, but you can also create your own, based on the standard ones.

To create a custom component

1. Click Tagged Pages in the Website section of the administrative interface.
2. Click Components.
3. Click the Create button on the upper-right corner of the list of custom components.
4. In the box after Tagged Component Name type a name for your component. Since we are creating a component for content manager, start the name of your component with “Content -“.
5. In the Format drop down select Content-1 Column. When you select Content-1 Column, a list of variables and other information will appear on the right side of the form.

   The limited size of the form means the information is a little cryptic, but the names listed inside square brackets are variables available to your component. And yes, we're getting right to the edge of doing actual programming, but fear not, this isn't that tough. You

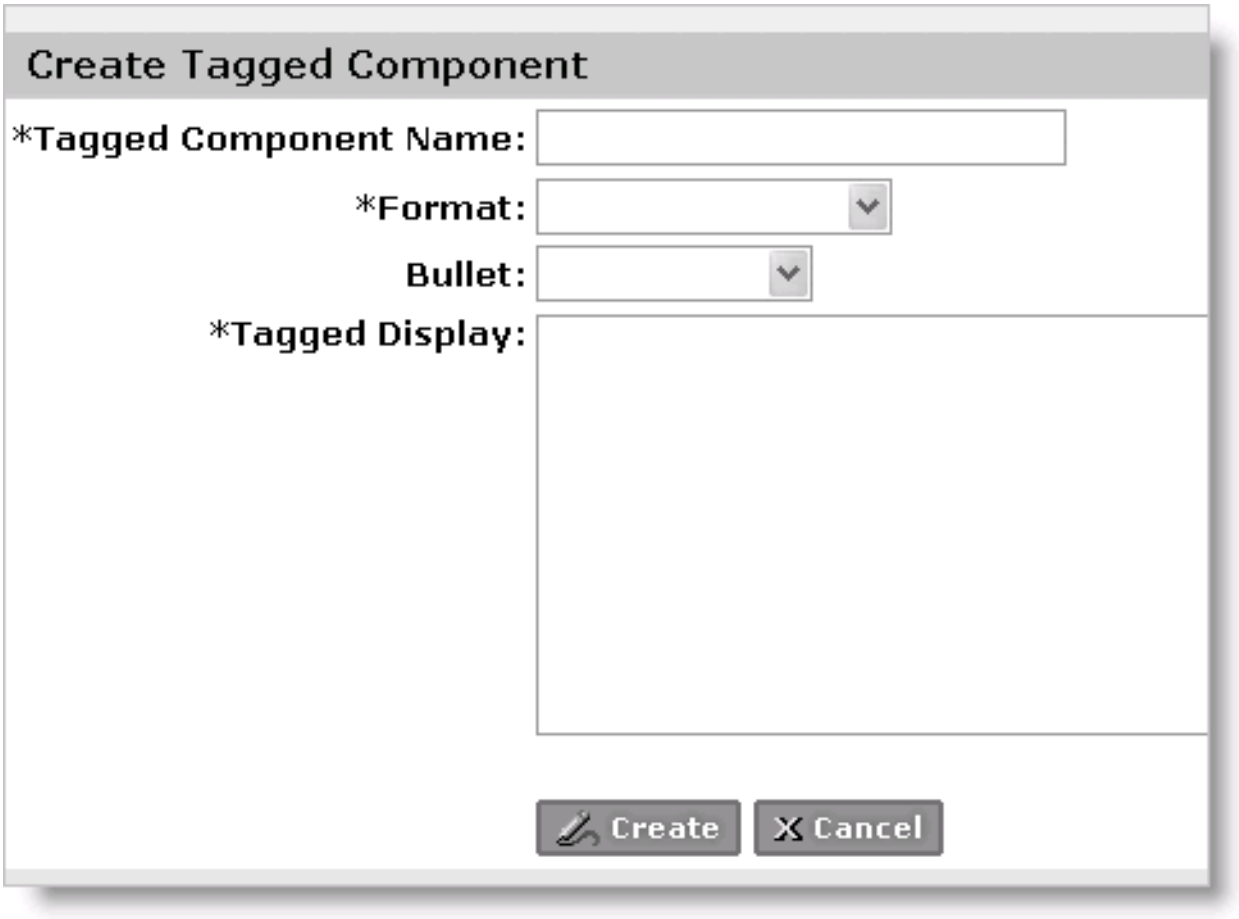
basically put one or more of these variables, along with whatever text and HTML you want, in the “Tagged Display” section of the form, and that's what the component will display on your page. For example, if you put “[Description]” in your display section, the component will display the description of any content records it retrieves. If you put “<Description>”, it will display the description and make it a link to the record.

Likewise “[Name]” will display the name of any content records the component retrieves.

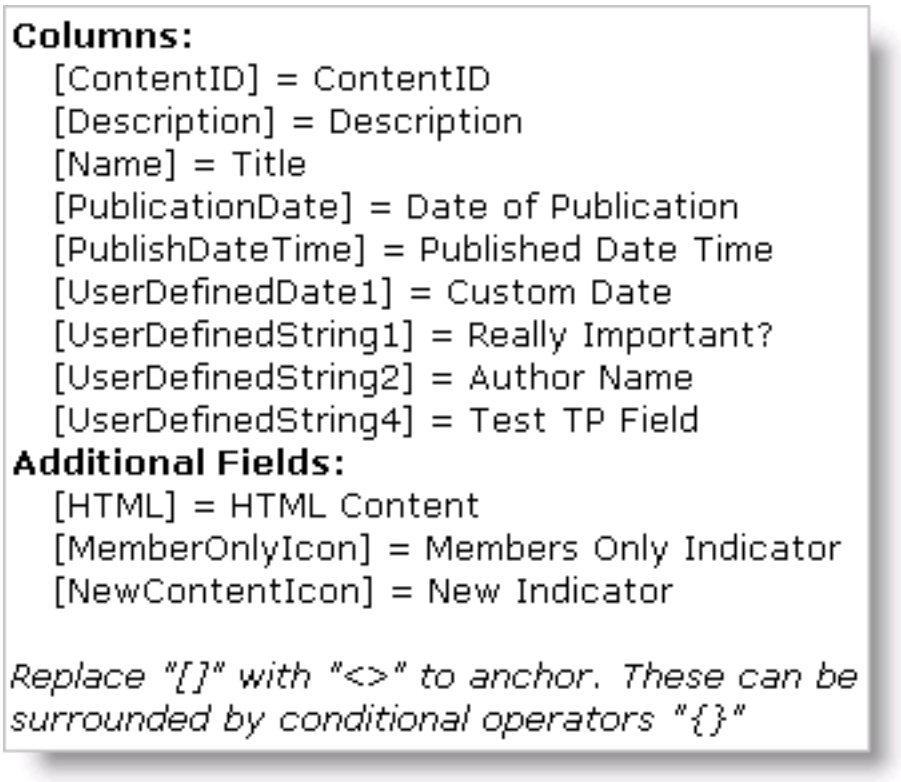
6. In the Tagged Display box, type “<Name> -- [Description]”.
7. Click Create.

You have now created a component that will show the name of a content record as a link to the full content record follow by two hyphens, then the description.

Note: Variable names are not case-sensitive.



Tagged Component Form



Fields Available in Content - 1 Column (includes UDFs)

Previewing Your Custom Component

Now that we've created your first tagged component, we're going to go back to your simple tagged page, add it in, apply tags, and see the results.

1. After saving your component, click on Layouts to return to the list of tagged pages.
2. Click the Edit button to edit an existing tagged page design (don't use one that's “live” on the front end!).
3. Using the component drop-down list, select the new component you just created.
4. Click the Save button.
5. Preview the tagged page to see how your component looks.

Things to Remember When Creating Custom Components

The process of creating custom components can give you great flexibility over how your information is displayed. Here are some good things to remember.

What Can Go Into the Tagged Display Field

The tagged display portion of your custom component determines what the component will actually display. This can be any combination of:

- Text
- HTML
- Variables

Again, variables displayed inside square brackets will output the value of the variable as text; variables inside greater than/less than signs will display the value of the variable as the text of a link to the full piece of content. Which variables are available will depend on the built-in component you have selected from the Format drop-down list.

There are some things you cannot do inside a custom component, but you can get very creative. One general principle to keep in mind is that whatever is inside the component will be executed once for every piece of content retrieved by the component. This means, for example, that you can not put a headline designed to be output only once into a component that may retrieve multiple pieces of content (if your component retrieves six pieces of content, it will repeat your headline six times).

Note: While the component editing form is small, you will be unlikely to run out of room when writing your tagged component code - the field can hold up to 4,000 characters.

Using the Conditional Feature

In the latest version of Tagged Pages, a conditional operator using “curly braces” {} is included. This is extremely useful if you have a variable that may not be populated 100% of the time - for example a content record description/summary.

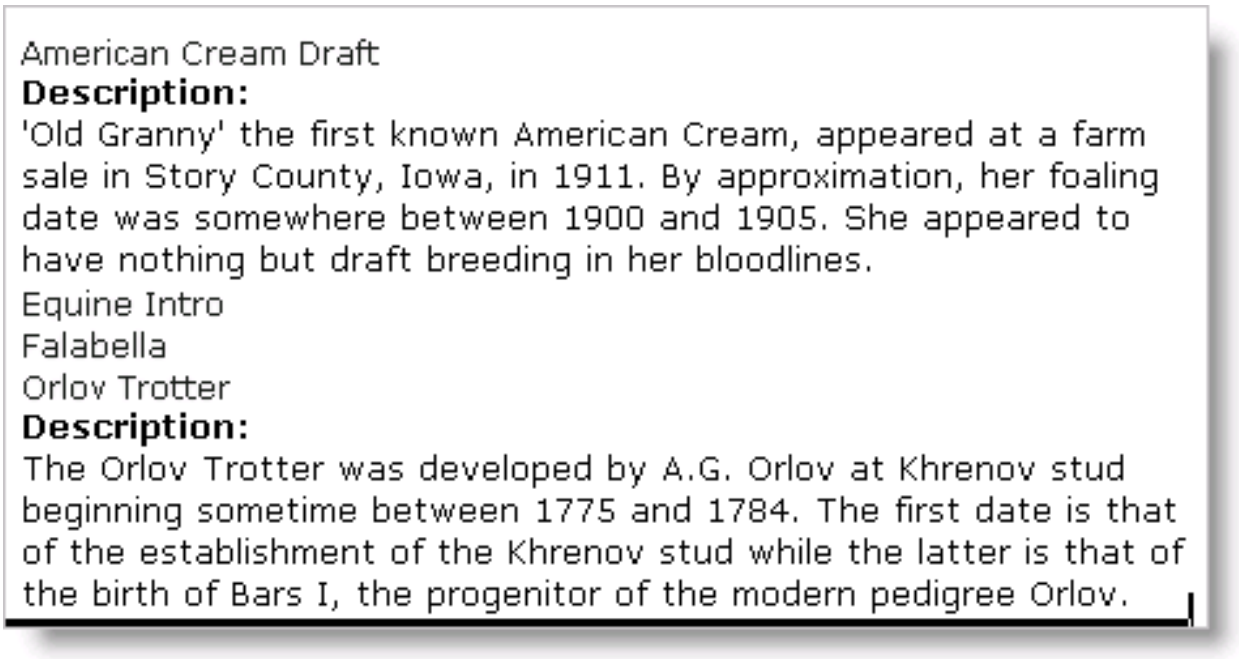
If you surround a portion of your custom tagged component code containing only one variable with curly braces and the variable has no value, nothing between the curly braces

will be output on the front end. This is very helpful if you want to output text and/or HTML formatting tags that will only be useful if the variable actually has a value.

For example, if most (but not all) of your content record have a description, you could do the following:

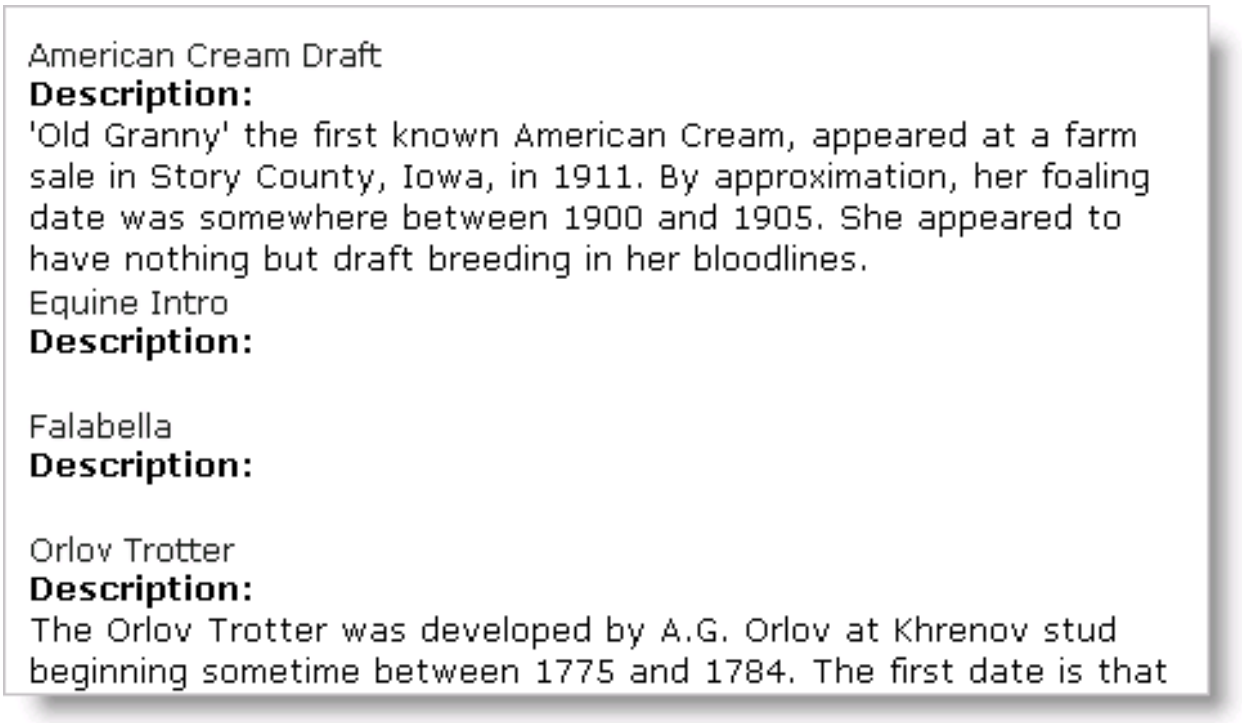
<Name>{
Description:
 [Description]
}

On the page, your component will output the description. Unless there is a description, the section of code between the curly braces will output nothing: no text, no bold tags, no break tags.



Output with Conditional Logic

The same component, without conditional logic, would output empty placeholders - there will be a heading that says “Description:” whether or not there is really a description.


American Cream Draft
Description:
'Old Granny' the first known American Cream, appeared at a farm sale in Story County, Iowa, in 1911. By approximation, her foaling date was somewhere between 1900 and 1905. She appeared to have nothing but draft breeding in her bloodlines.
Equine Intro
Description:

Falabella
Description:

Orlov Trotter
Description:
The Orlov Trotter was developed by A.G. Orlov at Khrenov stud beginning sometime between 1775 and 1784. The first date is that

Output, no Conditional Logic

Creating Bulleted Lists

One thing many users wish to do with custom components is build bulleted lists of links.

Using List Item Tags

The easiest (but probably not the best) way to create a bulleted list is to simply wrap list item (“
” and “”) tags around your link in your custom tagged component. Yes, it's true, strictly speaking, you haven't actually opened or closed your list using <UL> tags, but modern browsers will overlook this and display the results properly. For example, the code below will output a bulleted list of links using the name of each item as a link to the full content record. This produces a very simple output, but it is also reasonably clean looking and works well with a variety of background colors (except very dark ones).

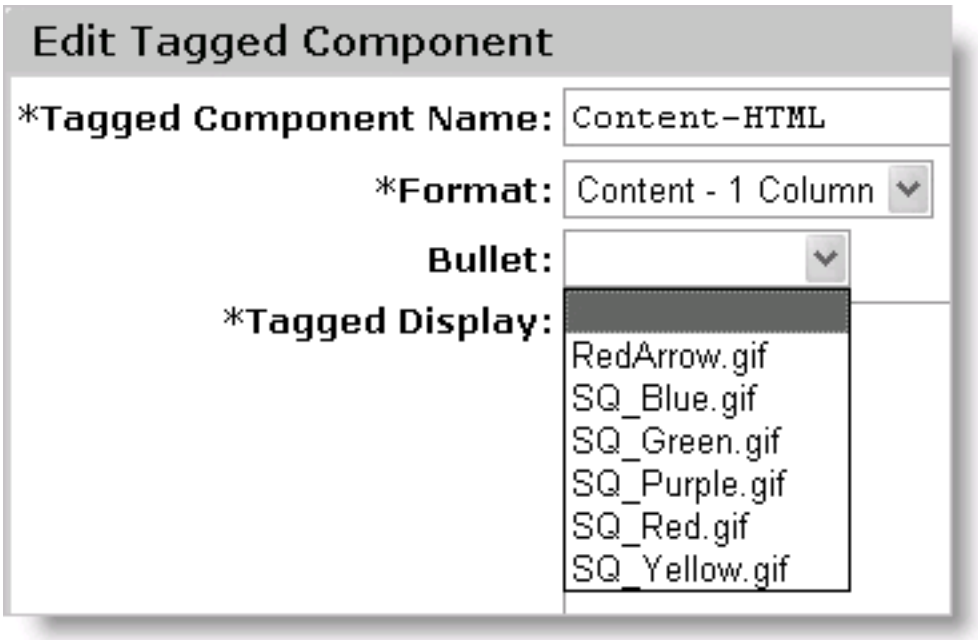
<name>

Bulleted List Using List Item Tags

Using Existing Graphical Bullets

The tagged page configuration setting TPBulletList includes a comma-delimited list of images stored in the Graphics directory which are intended to be used as graphical bullets for tagged page lists.

If TPBulletList contains at least one image, you will see a drop-down list for using bullets in the custom component editing interface. If you select one of the bullets, it will appear to the left of each record retrieved by the component.



Edit Tagged Component window

Adding Bullets to the List

Adding (or removing) bullets from the list requires directory permission to the Graphics directory for your site. In general terms, the process is as follows:

1. Find the Graphics directory for your Content Manager. One way is to use an existing bullet in a tagged page and then right-click on the bullet to show its properties. You can derive the directory information from the URL of the image.
2. Find the Admin/Graphics directory (used for back-end tagged page preview). Follow the same procedure as for the main Graphics directory, except instead of looking at the properties of a bullet in a front-end tagged page, look at the properties of a bullet in a back-end tagged page preview.
3. Place the bullet in the Graphics and Admin/Graphics directories.
4. Update the TPBulletList variable in the Tagged Pages section of the Site Settings interface.

We will assume that anyone with directory access will be familiar with the process of uploading images. To update the TPBulletList variable once you have uploaded your image(s):

1. From the administrative interface, click the Admin button. The list of Installed Modules will load by default.
2. Click on the Content Tagging link.
3. Click on the Configuration tab.
4. Add the filename of your new bullet to the comma-delimited list in the TPBulletList input.
5. Click the Refresh button at the bottom of the configuration settings page.
6. Be sure to set up a test component using the image, but it in a test tagged page and make sure it works on the front end and for back-end preview.

Note: Since tagged pages can use background colors, you want to make sure that your bullet images have a transparent background, not a white one. If your image is a white square with a red arrow in the middle, for example, it will look very odd on a gray page.

Removing Bullets from the List

To remove a bullet from the list

1. Look through all of your existing custom components and make sure you either choose a new bullet or no bullet (save with nothing selected on the bullet drop-down list) for each custom component using the bullet you plan to remove.
2. Update the list in Content Tagging configuration setting TPBulletList to remove your bullet (this will remove the bullet from the drop-down list in the component editing form).
3. Click the Refresh button at the bottom of the configuration settings page.
4. If you want to remove the bullet permanently, remove the file from both the Graphics and Admin/Graphics directory.

Using Files in the Images Directory for Bullets

While it is a better idea to use “official” bullets for the sake of consistency, there are times when you might want to use one of the images in your Images directory (the one accessible via the Image Manager). For example, if you don't have permission to access the Graphics directories and are only planning to use the bullet in a single component, using one of the files in the Images directory is a reasonable choice.

To do this you can simply insert an image (IMG) tag directly into your custom component code. All you need to do is the location and name of an appropriate gif or jpg in your /Images directory. The code below shows an example:

<IMG SRC=”/Customer/AM/Images/Bullets/BlueBullet.jpg”> <Name>

Note: You should be able to derive the location of your Images folder by previewing any image in the Image Manager and then right-clicking on the image to show its properties. The directory path will follow the base URL.

If you want to format your list more precisely, you can create a table around each item in the list (be sure to close any table you open inside the component so it doesn't affect the

overall table structure of your page). The code below shows an example (note that the TD holding the graphical bullet is fixed width, but TD holding the <Name> variable has no width specified, allowing it to “grow” as needed depending on the length of the Name variable's value.

```
<table border=”0” cellpadding=”1” width=”100%”>
 <tr>
 <td width=”15” align=”right”>
<IMG SRC=”Customer/AM/Images/Bullets/BlueBullet.jpg”>
 </td>
 <td><Name></td>
 </tr>
</table>
```

Using Inline Styles

The format of your website is controlled by a cascading style sheet (CSS), which will generally override any attempts to, for example, specify a particular font face. The thought behind this is to give your site a clean, professional look. However, when you are working in a custom component, you may want to do something very specific which isn't supported by any of the styles in your CSS. Yes, you could always add styles to your CSS, but that requires FTP or other access to your server, and any error you make will affect your entire website.

Another solution is to use inline styles inside a or tag. Inline styles are supported by all modern browsers, but nearly any book you get on cascading style sheets will tell you that inline styles are not a very good idea. It is true that using ad hoc inline styles in your HTML pages is not a good way to go - it can get you back into the same sort of “every page looks completely different” problem that cascading style sheets were designed to avoid. However, inline styles are an excellent way to create very specific effects within a custom component.

If you want to learn all the things you can specify in an inline style, you should get a good book on cascading style sheets. Inline style sheets use the same syntax as cascading style sheets, and while the syntax makes sense once you learn it, you'll definitely need to crack the books if you have no experience with CSS.

As an example of what you can do with inline styles, the following code will create a list of links. Each link in which there is a description (note the curly braces) will be followed by description in 10-pixel bold type, indented 15 pixels from the left margin to create a “hanging indent.”

<Name>{
 [Description] }

Note: You will not be able to use inline styles (or HTML) to affect the appearance of automatically generated links. Links created from variables (e.g. <Name>) carry their own style defined by a class attribute within the <a href=> tag, and will ignore your inline styles.

If you have a very specific idea in mind and want to create a different style just for the links generated by one component, it may be possible to “reverse engineer” links and create them yourselves in the component's code (you will have to insert ContentID as a variable in the Tagged_Page_Component_Column table). Getting such links to work will require some experimentation. If you want to change the style of all links on all tagged pages, you should edit the style sheets controlling tagged pages on the front end and tagged page preview on the back end.

Using Styles from the Style Sheet

In addition to defining inline styles, you can also use span tags in the following manner to apply any style in your site's style sheets.

This will appear as bold red text and this will appear as normal text.

A More Complex Inline Style Example

If you have web design skills (or someone on your staff does), you can use inline styles to move far away from the “list of links” appearance of a simple tagged page. The following example includes several non-obvious uses of styles and variables to create a bulleted list with graphical bullets and a rollover effect (spaces have been inserted for clarity). Note that the example uses the [ContentID] variable, which returns the unique numeric key of a particular content record. If this variable has not been set up in your software, you will have to do so by adding a row to the Tagged_Page_Component_Column table.

<SPAN onMouseOver="document.pic[ContentID].src='/Images/Training/Balcyan.gif'"
onMouseOut="document.pic[ContentID].src='/Images/Training/Balblue.gif'">

<img src="/Images/Training/Balblue.gif" name="pic[ContentID]" border="0">

</SPAN>

<Name>

[Description]

{ Last Updated: [UserDefinedDate1|dddd, dd, mmmm, yyyy]}

Let's take a look at the above example section by section. The first chunk of code, starting with “<Span onMouseOver=” sets up the graphical bullet with a rollover effect. In order to make the rollover effect work, we need to give each image in the list a unique name. To do this, we use the [ContentID] variable simply as a unique number generator. Note that each name also includes the string “pic,” which will result in an output such as “pic1178.” This is a necessary step. If you simply use an integer as an image name, the rollover will not work (and if you're an expert on the document object model, you probably know why).

We next output the name of the content record followed by a break tag. This will give us a link in the default tagged page link style class.

The next section, starting with the “<div” tag, is used to display the content record's description using an inline style that will display the description in small bold type with a hanging indent specified by the margin-left attribute.

And the last section, starting with “{<span”, will create an output such as “Last Updated: Monday, October 12, 2003” if the variable “UserdefinedDate1” has a value. The output will be further indented to the left, and will also be underline in pink. Since we are using curly braces, if the variable has no value, there will be no output from this section of code. And no, there is no particular reason why you would want to underline a date in pink.

Using Full-HTML Components to Display Text and Graphics

One of the simplest and most useful custom components you can create is one that simply displays the [HTML] variable. If a full-HTML component retrieves a content record with an HTML file, it will display the entire file (and only the file - any uploaded files or links will not be shown).

Some Things to Keep In Mind about Formatting

While some of the effects you can achieve by customizing tagged page components are amusing, you need to make sure that you don't end up with a strange and gimmicky looking output. One limitation to be aware of is that everything you add to the component will be produced once for each item found by the tagged page. If your tagged component retrieves 20 press releases and you've added an image link to the tagged component, your image will be repeated 20 times. For this reason, some of the effects described above are probably most useful if you know that your component will retrieve one and only one record (because you know that at any given time there will only be one record available with the unique combination of tags specified for the component).

Things You Cannot Do Inside a Component

While you can do many things inside a tagged component, there are some limits.

Components Cannot Execute ColdFusion Code

Components cannot execute ColdFusion code, so you can't (for example) add “CFIF” statements or use CFOUTPUT. Generally speaking, any ColdFusion code found inside a

tagged component will simply be written out in the page. Most browsers will simply ignore it.

You Cannot Change the Appearance of Links Generated by Variables

Wrapping greater than/less than brackets (< >) around a variable name will automatically generate a link to that record when the tagged page is viewed. The format of these automatically-generated links is controlled by a style sheet class called “TPLink.” There is no practical way to override this class definition from within a component, you would have to change the class definition in the style sheet (which will change it for all automatically generated tagged page links on your entire site).

Using Conditional Logic in Tagged Components

Consider a custom component with code such as the following:

<Name>
Description: [Description]

This will look fine if you are absolutely sure that your content records will always have a description. However, if a content record does not have a description, you will see the heading “Description:” followed by empty space.

The way to get around this problem is using curly braces {}. If you use curly braces to surround any collection of text, HTML and only one variable, nothing inside the curly braces will be output if the variable has no meaningful value. If you put [Description] inside curly braces, nothing will be output if there is no description in the content record.

To re-do our example using conditional logic, we would go back to the list of components, edit our component and replace the original text with:

<Name>{
Description: [Description]}

Formatting Dates in Custom Components

If you've tried to use a date variable in a custom component, you probably found that the output looked something like this:

2004-02-13 09:07:24.94

Beneath the list of variables on the component editing form, you'll see some instructions for formatting dates in friendlier format. The best way to learn how this works is to experiment. Write something like the examples but replace the “XdateTime” with the name of one of your date variables (for example “PublishDateTime”).

Some examples of date formatting would be:

[PublishDateTime|mm/dd/yyyy]	06/10/2004
[PublishDateTime|mmmm dd, 2004]	June 10, 2004
[PublishDateTime|dddd]	Monday

Time can be output in a similar way, except that instead of using the “|” character (called a “pipe” by programmers) to separate the variable and the output format, you use a colon.

Note: The PublishDateTime variable is a good one to practice with because it's simply the date and time when a content record was last published, and every published content record will have one.

User-Defined Fields (UDFs) in e-CM

e-CM provides five user-defined date fields, five user-defined character string fields, and five user-defined numeric fields. These user-defined fields can only be used with tagged pages and custom pages.

Requirements for using user-defined fields

- The Variable column displays the actual (system) name of the user-defined field as a link. You can select this link to populate the field's information in the form in the Modify Existing User Defined Field area so that the field can be edited.
- The Label column displays what users actually see in the user-defined field in a content record.
- The Req column indicates whether the field is required. If Y, the label displays in bold on the content record properties form and server-side validation will require that the field be populated when the form is saved (server-side validation also enforces the data type for

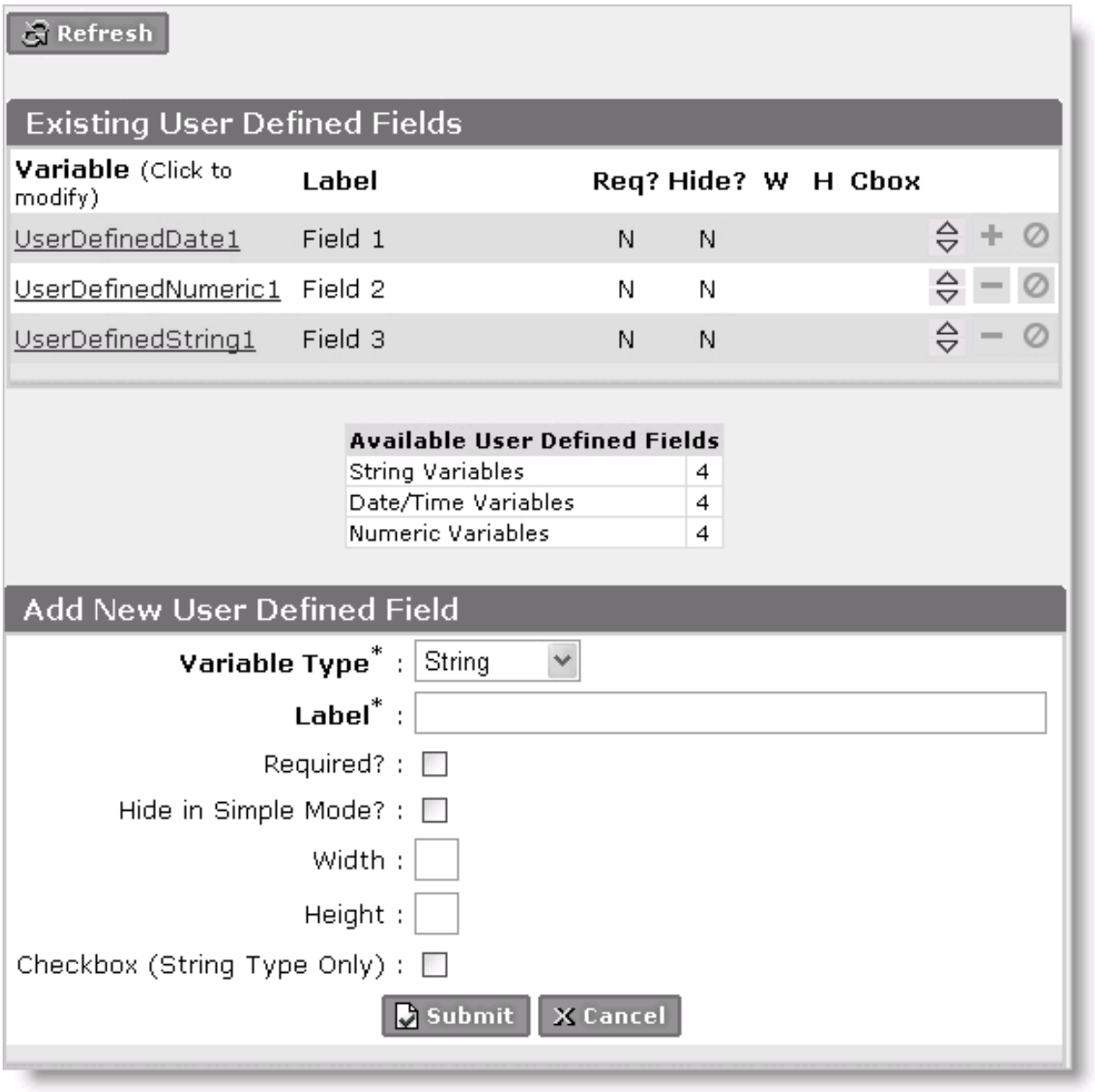
numeric and date UDFs).

- The Hide column indicates whether the field is hidden in simple mode.
- The W and H columns indicate the width of the field. If no value is displayed, the default width is used.
- The Cbox column indicates whether the field is displayed as a checkbox rather than as a text input. Checkboxes can be used to collect Y/N data in string-type UDFs.
- The Delete icon deactivates the field, but does not delete it, making the field available again for use as a user-defined field. All previously entered data for the field is cleared.

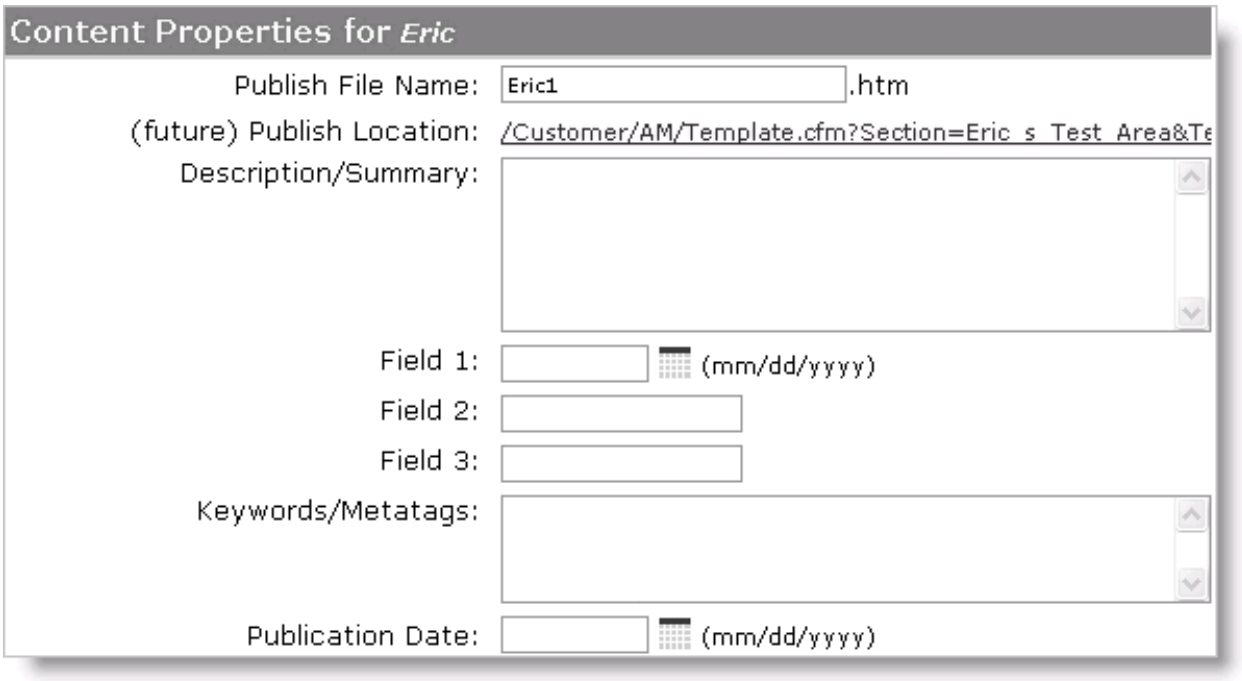
Understanding the UDF Editing Interface

The UDF interface has three parts:

- Existing User Defined Fields - Displays the configuration of the currently defined user-defined fields
- Available User Defined Fields - Displays the number of user-defined fields of each type that are not currently defined
- Add New User Defined Field - Used for editing existing user-defined fields and for defining new user-defined fields



User-Defined Field Editing Interface



User-Defined Fields in a Content Record Properties Page

What fields appear in a content record properties page is a result of the settings. Note that UDFs appear between the “Description/Summary” box and the “Keywords/Metatags” box, and that date fields include a pop-up JavaScript calendar which allows users to easily select an mm/dd/yyyy-formatted date.

Description of UDF Interface

The UDF interface has three parts: a top form which shows the configuration of fields already activated, a central display of how many fields of each type remain un-activated, and a form on the bottom for editing existing fields and activating new UDFs.

The List of Existing UDFs

The top of the UDF interface shows any existing UDFs and their status. Left to right:

Column Name

The actual column name in the Content table (e.g. “UserDefinedDate1”) appears as a link. Clicking on the link populates the UDFs information in the form at the bottom so that it can be edited.

Label

“Label” is what the user will actually see in a content record.

Req?

“Req?” indicated whether the field will is required - whether users will have to supply a value when they create or edit a content record. If “Y,” the label will appear in bold on the content record properties form and server-side validation will require that it be populated when the form is saved (note that server-side validation also enforces datatype for numeric and date UDFs).

Hide?

If this feature is checked, the UDF will be hidden from users in simple toolbar mode.

W and H (Width and Height)

“W” and “H” indicate width and height, if specified. If you don't specify a height and width, you get default values, which are a height of 1 for all types, and widths of 10 characters for date fields, 20 characters for character and numeric fields.“Cbox” indicates whether the field is to be displayed as a checkbox rather than a text input. Checkboxes can be used to collect Y/N data in character (“string”) type UDFs. When checked, the field will store “Y.” When not checked, it will be null.

Move Up or Down

The up and down arrows can be used to move UDFs up and down in the list. The order of the list reflects the order in which they will be displayed in the content record properties form. Moving the UDFs in the list will move their position in the content record properties form.

Plus and Minus

The plus + and minus - buttons indicate whether the fields should be activated as tagged page columns. If a UDF is activated as a tagged page column, it means three things:

- It will be available as a sort criterion in tagged pages.
- If the UDF is a date field, it will be available to specify a date range for the records retrieved.

- It will available as a variable when building custom components to display records in tagged pages.

To define a new user-defined field

1. Select Website.
2. Select Sites.
3. Select UDF Manager.
4. Define the field in the Add New User Defined Field area.
5. Select Submit.

To edit an existing user-defined field

1. Select Website.
2. Select Sites.
3. Select UDF Manager.
4. Select the user-defined field to edit in the Existing User Defined Fields area.
5. Edit the field in the Modify Existing User Defined Field area.
6. Select Submit.

To delete an existing UDF

The delete button does not delete the field, but inactivates it, throwing it back into the “pool” of unused UDFs. It also clears all previously entered data users have entered in the field, so consider carefully before doing this.

How to use UDFs in taggedpages

In a tagged page, you can use UDFs for three purposes:

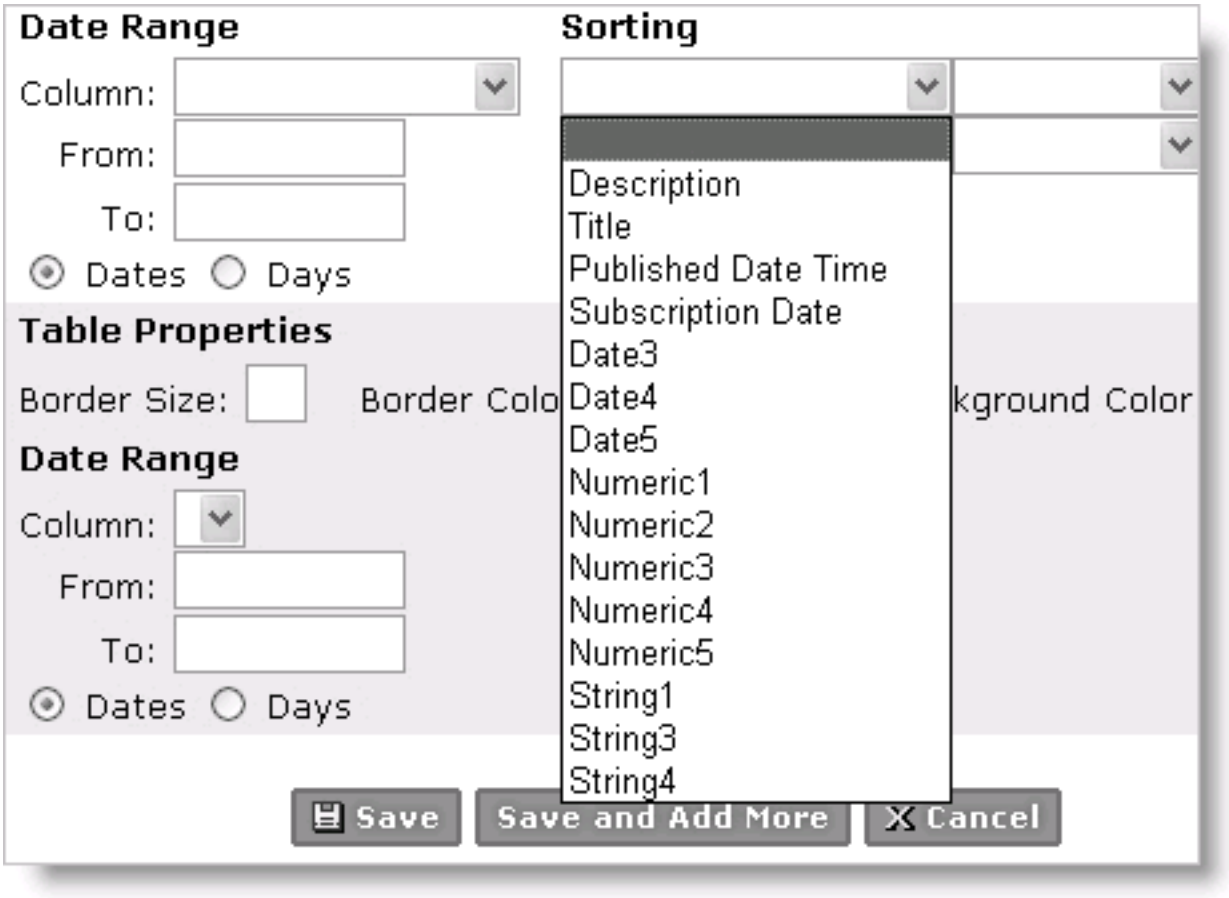
- Using a custom component, you can display the value of the field on a tagged page.
- Date UDFs can be used with the “Date/Column Range” feature to filter the records shown

by the page by date.

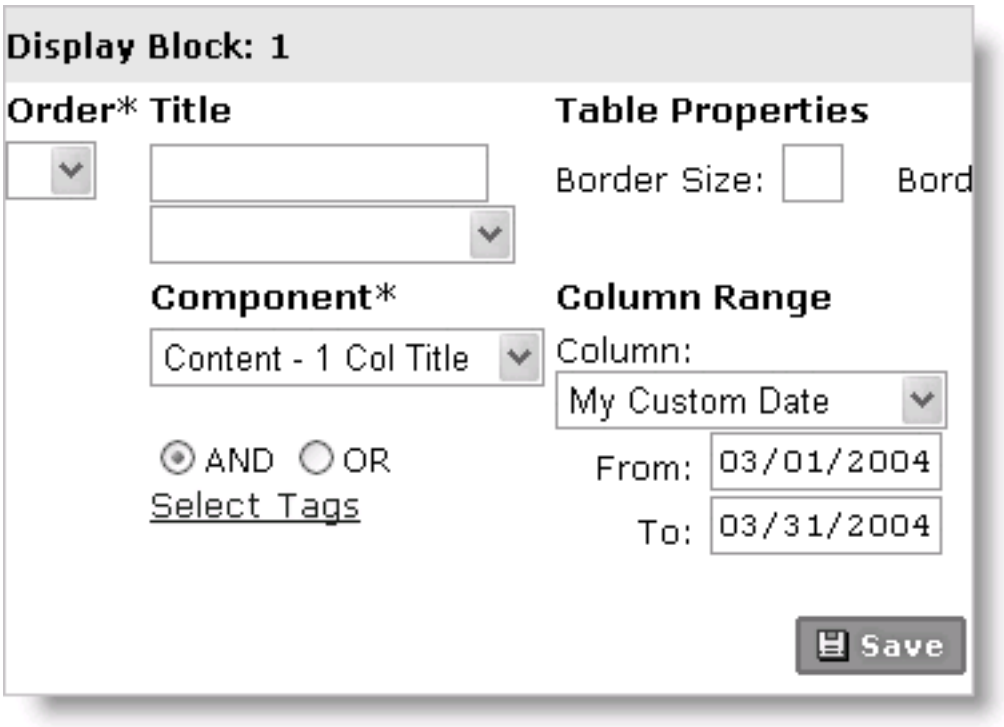
- Any UDF can be used to sort the records shown by a page.

  Sorting by a UDF

  You can use any UDF to sort the records retrieved by a tagged page. Several user-defined fields appear. To sort by a UDF, simply select it as either the primary or secondary sorting criteria and then specify Ascending or Descending order using the drop-down list to the right of the sorting drop-down.



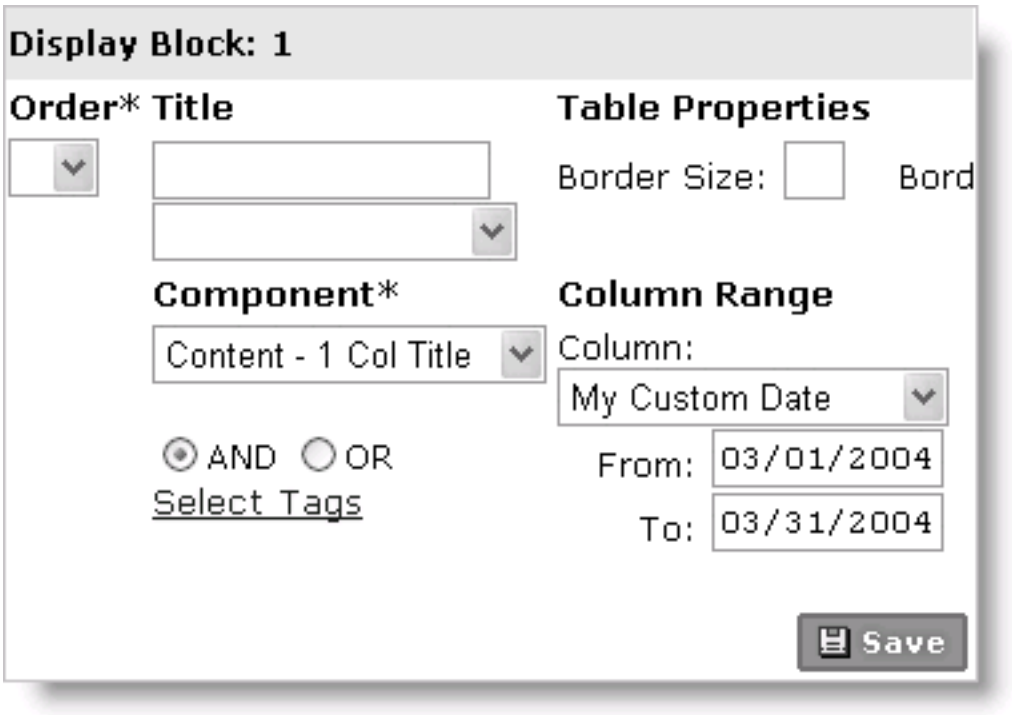
Sorting by UDF



Specifying a Sort Criteria in a Tagged Page Layout

Using Date UDFs to Filter by Date

Any “Date/Time” UDF will appear as a choice in the Date/Column Range feature in a tagged page. Here, a date UDF filters the output:

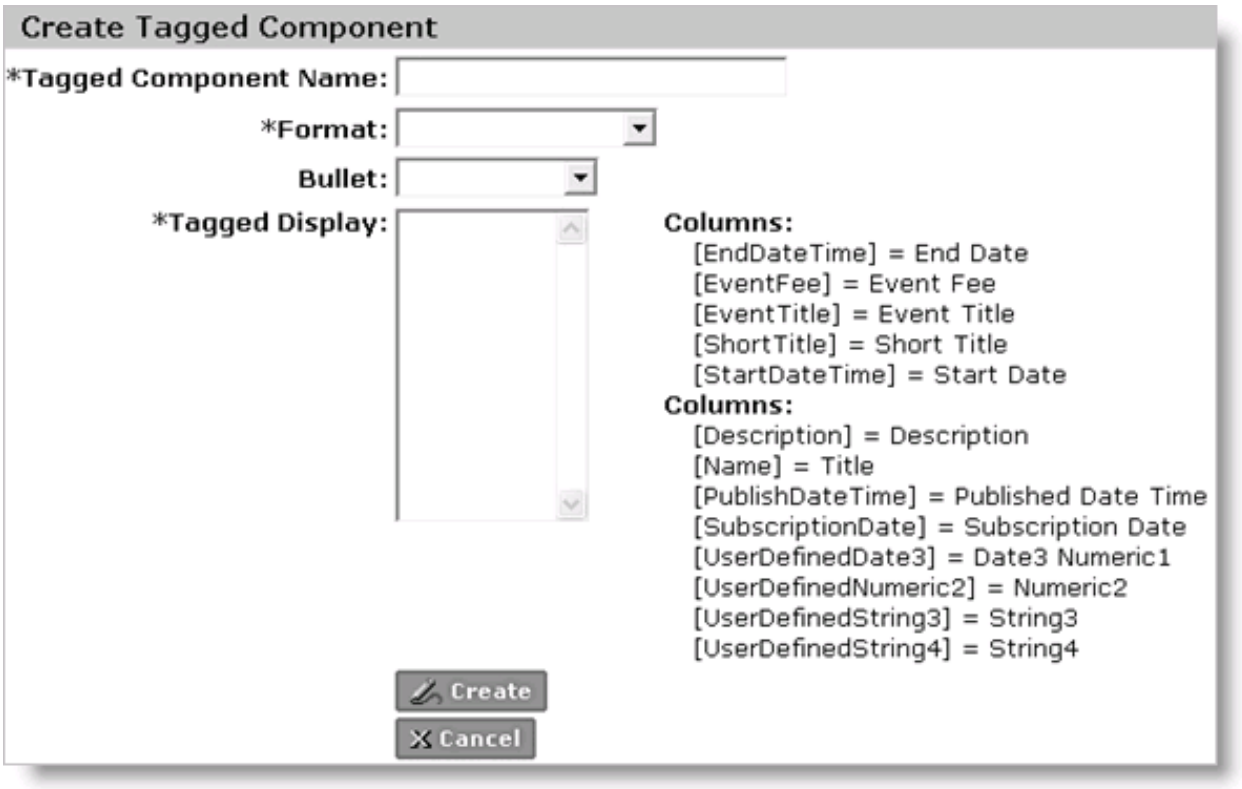


A Date Criteria Specified in a Tagged Page

Using UDFs in Custom Components

When user-defined fields (UDFs) are enabled for use in tagged pages, they will also appears as variables in the component editing form. The variable names will be the actual column name in the database (e.g. “[UserDefinedString3]” and the label used with the UDF will appear to the right of the variable name. If, for example, you wanted to display a field you are using to hold an Author Name in your tagged pages, and that UDF was using the UserDefinedString1 column in the database, you might put code in your custom component such as the following:

{
Author: [UserDefinedString1] }



Variable Names in Custom Component Form (Simplified and Compressed for Space)

Date of Publication and Search

If your website includes advanced search, you should be aware that UserDefinedDate1 is the date field which will be used when a user chooses to order search results by date.

Content Tagging and UDF Tables

This chapter is provided for reference purposes for site configuration and troubleshooting. If you use database administration tools to directly alter data in any of these tables, you may well disable important tagged page features, or make tagged pages unusable.

There are some cases in which you can accomplish certain “tweaks” by directly altering data. The information is accurate to the best of our ability to make it so, but the presence of information about altering data should not be interpreted as a guarantee from Advanced Solutions or its resellers and agents that doing so will not cause the application to malfunction.

Component_Interest_Category (Basic Linking Table for Tagging)

Component_Interest_Category is the basic linking table that is written to when a user tags something (for example, a content record in e-CM, an event in Event Manager, etc.).

The table has only three columns:

- Component Code: Two-letter code for the product involved (e.g. “CM” if the row reflects the tagging of a content record).
- InterestCategoryID: The unique numeric ID of the tagging category.
- ComponentID: The unique numeric ID of the item being tagged (the content record, the event, the product, etc.).

Should You Edit this Table Directly?

Unless you are doing mass tagging via a script or utility, you would generally use the ordinary e-CM interface to alter data in this table.

Component_Interest_Group (Active Matter Modules and Tag Families)

Component_Interest_Group is the table which determined which components (meaning products such as CM) can use which main (level-one) tagging categories and their descendants. This is what you are affecting when you use the Modify Components button on the admin interface.

In structure, it is a straight linking table containing only the two-letter component code and the InterestCategoryID.

Should You Edit this Table Directly?

Since altering data in this table is accomplished simply via the “Modify Components” interface, there is no reason to directly alter data.

Content (Holds Content Records)

This is the table that holds content records in e-CM. The fields relevant to tagging are the ContentID itself (which gets linked to Interest_Category when a content record is tagged) and the various user-defined fields which can be enabled in tagged pages.

Should You Edit this Table Directly?

You generally would not directly alter data in the Content table except during initial content migration to populate content.

Interest_Category (Tagging Categories)

General Purpose of Interest_Category

This is the table which stores the tagging categories. The fields used by tagged pages are the unique identifier InterestCategoryID and the Name column, holding the primary key and the description of the tag as seen by admin users respectively.

Should You Edit this Table Directly?

Since an interface exists and since some of the columns determining parent-child relationships between categories are not intuitively obvious, there is no obvious reason to alter data directly in this table. In fact, doing so would be ill-advised.

Tagged_Page_Color_Ref (Colors for Tagged Page Tables)

General Purpose of Table

This table holds colors (hex values and descriptions for administrators) used for the table and border colors in the tagged page design interface. Default colors are:

TaggedPageColor TaggedPageColorDesc

---------- ----------

#000000 Black

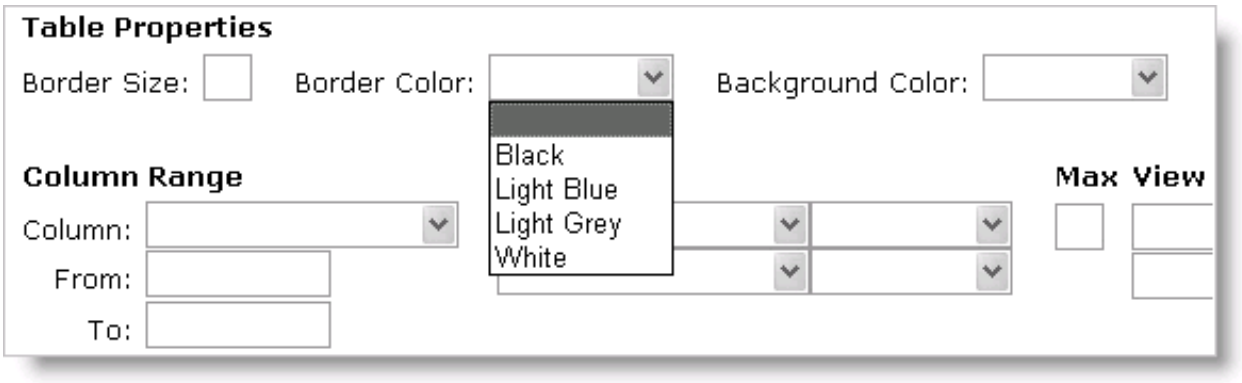
#CCCCCC Light Grey

#FFFFFF White

Typically, additional colors would be loaded into this table (there is no interface) to match a client's design colors.

Should You Edit this Table Directly?

This table should have its data directly altered before deployment to provide additional color choices in the tagged page editing interface.



Tagged_Page_Color_Ref in Action

Tagged_Template (Built-In Components)

The Tagged_Template table holds information about “built-in” tagged page components such as “Content - 1 Col Title.” In effect, this table “registers” these components, and includes information about which components belong to which programs (for example, Event Manager). Components in this table will appear in the drop-down list of components in the tagged page editing interface if their parent application is activated in the Component_Ref table.

Should You Edit this Table Directly?

You would not alter data in this table under normal circumstances. If your aim is to remove un-needed components (e.g. to remove Event Manager components if Event Manager is not being used), you would want to set Component_Ref.TaggableFlag to “N,” not remove rows from “Tagged_Template.” If you remove rows from Tagged_Template and the customer later purchases the module involved, the module's components will not appear, causing much puzzlement.

Tagged_Template_Field and Tagged_Page_Component_Column

Tagged_Template_Field and the somewhat similar Tagged_Page_Component_Column table together hold information that enables, disables and configures the variables that are available to tagged pages and their components.

Note: Which variables end up in which table is a reflection of the internal design of the tagged page code. The only practical implication of the difference for administrative

users is knowing that only the fields in the Tagged_Page_Component_Column table can be used for sorting and filtering tagged page output.

Tagged_Template_Field

The Tagged_Template_Field table holds variables that the built-in components are hard-coded to recognize and associates those variables with a specific component. In CM, these are the variables [HTML], [MemberOnlyIcon] and [NewContentIcon]. These variables are available for display in custom components, but are not used for sorting or for the column range feature. Columns in the table:

- TaggedTemplateID: Which specific built-in component in the Tagged_Template table does this apply to?
- FieldName: Actual column name in the Content table.
- FieldDisplayName: Name to show administrator in component editing interface.
- ActiveFlag: If “Y” variable is active.

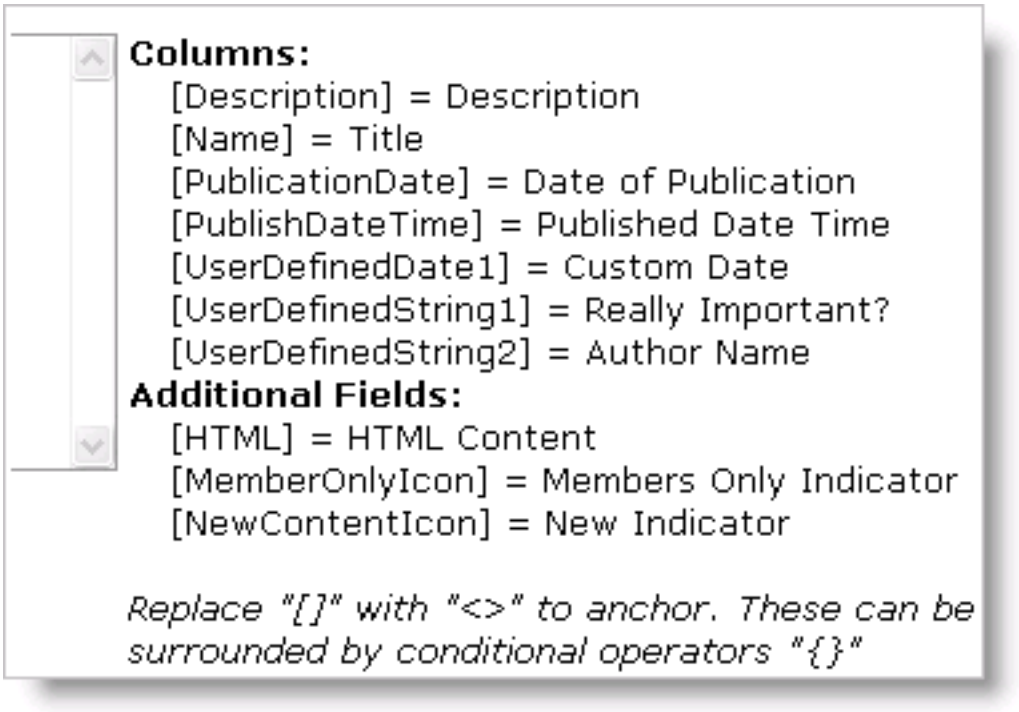
Tagged_Page_Component_Column (UDFs and Standard Variables)

Tagged_Page_Component_Column handles user-defined fields (UDFs) and a collection of standard variables which are available to all custom components associated with a particular program (e.g., Content Manager). In e-CM, the two standard variables are [Name] and [Description]. The names of variables match the actual column names in the database. The variables in Tagged_Page_Component_Column can be used in sort or the column range feature. Important columns in this table include:

- Component Code: Two-letter code for component (e.g. if this is an e-CM variable, “CM”).
- ColumDisplayName: A descriptive name displayed to the user (for example, the descriptive name for [Name] is, by default “Title”).
- RangeFlag: If “Y,” variable is active in tagged page column range feature.
- ActiveFlag: If “Y,” variable is active in tagged pages - it appears in custom component editing interface and also as a sorting criteria on the tagged page design interface.

- ColumnType: This column needs to be populated only if the field is a datetime or numeric datatype, in which case it must say “date” or “numeric.”

  Note: The typical symptom of problems with the data in these tables is a partial or complete lack of variable information on the right side of the interface when a user is attempting to create or edit a custom component.



Variable Information Properly Displayed in Component Form

Should You Edit this Table Directly?

The only common reason to directly alter data in Tagged_Template_Field would be if you do not want one of the default variables to be active. In that case, you could set ActiveFlag to “N” in the appropriate row(s) - remember, you will have to do it once for each component you wish to inactivate the variable in.

You could also activate additional variables corresponding to other columns in the Content tables by adding rows for those fields, but be careful, test your work carefully, and keep in mind that Advanced Solutions makes no guarantees that any specific variable will work as you intend it.

The UDF Manager currently handles all data in the Tagged_Page_Component_Column table with the exception of the RangeFlag, which enables a variable to appear in the Column Range feature in tagged pages.

Note: If you are copying and pasting data into either of these tables via Enterprise Manager, you should first copy and paste to a text editor such as Notepad in order to ensure that you do not include any newline/linefeed characters, which will break the JavaScript on the Tagged Page editing interface and make it unusable.

It holds information on user-defined fields, including the following:

ColumnName: The actual name of the field in the Content table, for example, “UserDefinedDate1.”

ColumnDisplayName: The name that users will see in the tagged page interface and the tagged page component interface.

Tagged_Page_Format_Ref (Images Representing Layouts)

This is a purely internal table which sets up names and big and small images for the tagged page plans (1 through 7).

You would never want to change any data in this table.

Tagged_Page_Format_Type_Ref

Another purely internal table which sets up two types of tagged pages, T for tagged (the designs 1 through 7) and C for custom pages (pages built by users based on the 7 built-in plans). You would never want to change any data in this table.

Tagged_Page_Interest_Category (Adding Tags at Link)

This is the table which is populated when you add an additional filtering tag at a tagged page link. The only two columns are the ID of the content record involved and the ID of the tag involved.

You would never want to change any data in this table.

Filtering Tag Applied at a Tagged Page Link

Tagged_Page_Layout

Stores basic info about tagged pages, including what plan (1-7) they are based on and what their name is.

You would never want to change any data in this table.

Tagged_Page_Portlet (Each Component in a Specific Tagged Page)

Each component in each specific user-designed page is registered here, including things like headline, max rows, border color, whether to use “AND” or “OR” for tags, sorting criteria, and in the case of custom components the user-defined content (the stuff you type into the textarea). Foreign keys also link the specific component instance to the tagged page section (individual display block in an individual user-designed page) it is in and the built-in component (e.g. “Content - 1 Col Title”) that is being used to support output.

You would never want to change any data in this table.

Tagged_Page_PortletIC (What Tags Used by Each Component)

Determines which tagged page categories are associated with which component in specific tagged pages (which tagging categories the components are looking for.) In other words, if you tell a specific component to grab content based on 3 tags, it will write 3 rows in this table. It connects the TaggedPagePortletID from the Tagged_Page_Portlet table on the InterestCategoryID from the InterestCategory table. That's all - just a straight linking table with those two fields.

You would never want to change any data in this table.

Tagged_Page_Section

Holds information about each display block in a user-defined page, including which specific display block it is in, the width (if specified), and what user-designed page it is in.

Tagged_Page_Title_Ref

Populates the drop-down for user-defined page title options (e.g. “Blank/No Title”).

You would never want to change any data in this table.

Tagged_Portlet

Holds basic info on all the components, built in and user-defined. Also holds info about which standard components the user-defined ones are based on.

If you are getting components you don't want in tagged pages, (e.g. newsletter components for a customer who does not have Newsletter Manager), you can eliminate them by deleting rows in this table, but a better way (because it's easily reversed) is to set ComponentRef.TaggableFlag to “N” for the component involved.

Tagged_Section

This sets up the display blocks in each built-in tagged page layout (1-7). Each display block within each page has a unique numeric id and 2-letter code. Each block/section gets a name for display - simply a number, before which “Display Block” is inserted in the interface.

You would never want to change any data in this table.

Tagged_Section_Template

Relates display blocks (unique display blocks, of which there are currently 19 on the 7 built-in page designs) to the built-in tagged page components (of which there are currently 18) which may be used within them. This is a simple two-column linking table with integers in each column.

Be aware that two-column components are not linked to some of the narrower sections (but could be if the data were added to link them).

Tagged_Template

Relates the built-in components to their actual files and their components (for example, Content Manager, Press Releases, etc.).

You would never want to change any data in this table.

Tagged_Template_Field

Registers the “Additional Fields” on a component-by-component basis for built-in components. For example, this is where the Content-1 Column Title component receives the [HTML] variable. The tagged template ID (the first column in the table) corresponds to the primary key of the built-in component (see “Tagged_Template” above).

You would generally not want to alter the data in this table.

User_Defined_Field

This table holds the basic information for each currently active user-defined field. There is no reason to access this data directly because it can all be changed via the UDF Manager. The table contains one row for each active UDF. The nature of most of the data in the table is straightforward with the exception of the mysterious-sounding “SimpleAdvancedFlag” column. This field (either “S” or “A”) determines whether the UDF is shown in “Simple” toolbar mode, which collapses the content record properties form to show only essential form inputs. If “A” it is hidden in simple mode, if “S” it is not hidden in simple mode.

URL Manager

The URL Manager allows you to create a short form URL for links to your website.

To create a url map

1. Go to the iMIS Website Administrative Portal.
2. Select URL Manager from the left menu.
3. Click Add.
4. Enter a directory name for your web page.

/map

5. Enter short form URL for the web page.

   AM/Template.cfm?Section=Asia_Pacific11&Tem-
   plate=/TaggedPage/TaggedPageDisplay.cfm&TPLID=19&ContentID=9682

6. Click Save.

   Note: You must use https:// and the fully qualified path for pages which are SSL enabled.

Using .NET pages on .ASP sites

eCM 5.1 and Template Gallery - support ASP pages

Content Manager version 5.1 allows you to serve ASP pages. Options for standard templates, printer-friendly pages, and text-only pages are subsequently added to the Website Properties page. All existing templates have been added in an ASP format as well. This supports your .NET applications and websites.

Create a template in ASP.NET

The Website Properties page provides an option to construct ASP.NET templates in place of ColdFusion templates. This option is provided when you are creating the website. Depending on your choice, template header and footer drop-downs and master page drop-downs are hidden or displayed dynamically on the website properties page.

- If you use Template Gallery to create the website, a master page and HomePage.aspx are generated.
- If you manually create a website, there are three new prompts: the website master page, printer template master page, and text-only template master page.
- If you use the Create Tutorial Site using ASP.NET template option, you see the same master page prompts as when you create a website manually.

  Note: It is also possible to create both ColdFusion and ASP.NET templates for the same website.

ASP.NET master template options

You can create an ASP.NET template on the Website Properties page. Set the Which platform will the site template use, prompt to ASP.NET. This choice can be changed later from the Website properties page.

Once the ASP.NET option is selected, three drop-down menus allow you to choose the master pages which control the look and feel of the template.

The options are:

Standard Template - Which master page file should be used with this website?

Printer friendly version - Which master page file should be used for the printer template?

Text only version - Which master page file should be used for text template?

To create an ASP.NET template

To use both ColdFusion template and the ASP.NET master page simultaneously in e-Content Manager 5.1 you need to save the website properties changes twice.

1. On the Website Properties page, specify the platform for the website as ColdFusion.
2. Select header and footer files for the ColdFusion site.
3. Save the changes.
4. On the Website Properties page, switch to the ASP.NET platform.
5. Select the ASP.NET master page.
6. Save changes.

Note: Saving the second time does not clear the header and footer choices made for the website.

Creating the tutorial website for ASP.NET

From the Create drop-down, select Create Tutorial Site using ASP.NET template. The setup wizard has an option for choosing ColdFusion or ASP.NET for the tutorial site. This enables you to choose an ASP.NET master page for the tutorial site.

Templates determine type of page

You can set the search properties of each website to include or exclude other e-CM sites. The search results can include content that was placed in both .asp and ColdFusion templates. Search items are displayed in the templates from which they originated. The url of the search item will indicate the type of the original template, .asp or ColdFusion.

If you don't want to allow searches on other e-CM sites, on the Website Properties page, you must set, Would you like this website's search to include content from other sites that allow it?, to No.

Reviewing Surf to Edit

Content producers can add an icon to their web browser to allow them to surf the website as a normal user and then select this icon when they see a page they need to edit. The user must have permissions to access Site Navigation. If a properly authenticated user selects the CMS Admin icon, the administrative page that allows editing of the particular content the user was viewing is displayed. This is especially useful for locating pages that need to be changed based on content tags or keyword search results.

Understanding How Surf to Edit Works

The surf-to-edit icon that is created on the user's web browser tool bar is a link to the Surf-To-Edit page within the CMS system. This page determines which content the user wants to edit based on the URL that the user was viewing when the AM CMS link was selected.

Once the location of the page to be edited has been determined, the user is redirected to this page and the user's modification permissions for the page are verified. If the user has permissions to modify the content, the user's web browser displays the Content Editor (Ektron) with the content item automatically placed in the Working state. For other types of content (for example, product display within the store or event display within Event Manager), the user's web browser displays the administrative interface for the item.

Understanding Surf to Edit Requests

If a user surfs to a piece of content that the user does not have authority to edit, a message displays and the user can send an edit request to the content owner if needed. The

user must have permissions to access Site Navigation.

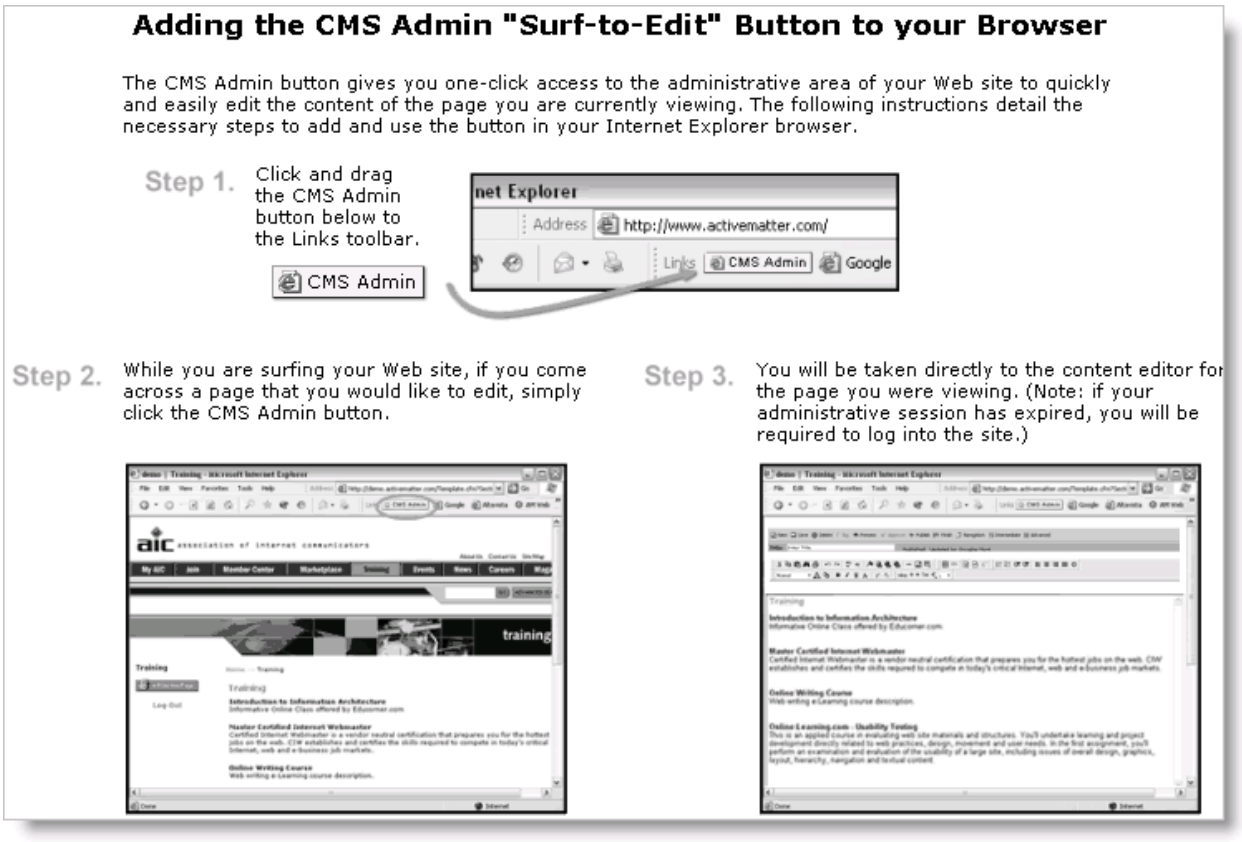
If the user elects to send an edit request to the content owner, a page displays to allow the user to send the request to the content owner. If the content is in the Working state, the request is sent to the user who is working on the content. If the request is in any state other than Working, the request is sent to the user who most recently modified the content.

Note: In some cases, the request may be sent to a user who recently modified the content, but who does not have authority to approve and publish the content. This user should be familiar with the content and will probably know how to get approval for any changes.

Setting up Surf to Edit

To enable Surf to Edit

1. From the e-CM Admin page, select Site Navigation.
2. Select Surf to Edit.
3. Follow the instructions on the page to set up surf-to-edit for your web browser.



Adding the CMS Admin Surf to Edit

To send a request

To send a request to modify a particular piece of content you must first be logged in to e-CM so the system will “know” who you are. Once you are logged in:

1. If you have not yet installed the surf-to-edit link on your browser, go to the administrative interface; select Website> Site Navigation> Surf to Edit. Follow the instructions on the right to install the link on your browser.
2. Find the page you would like to modify on the front end of the website.
3. Select the surf-to-edit link from your browser's links section.
4. When asked if you would like to send a request, click OK.
5. Fill out the form.
6. Click Send.

The request will now appear in the user's request queue and the user will also be notified via e-mail.

Note: In some cases, e-CM will not be able to determine which content is being displayed on the front-end. In that case, you will be given a link to the content management interface.

This table contains only one row, and one column for each potentially active UDF. Each column name corresponds to a specific UDF (e.g. “UserDefinedDate1”). If the field is active, the column contains the UDFs label (the name for the field displayed to the user on the content record properties page).

Using the Template Gallery

Each template of the Template Gallery is associated with several designs. The designs contain the color scheme, font definitions, and placeholder images that appear in the template you choose. You can modify any template to reflect your organization’s branding and place appropriate content in the pages.

Changing the Content Areas

The content areas on each template define where you will place your own content, images, or functionality on the page. Each template is divided into several content areas with associated content records. Each content area can hold a variety of material — images, HTML, tagged pages, a list of links, and functionality. For example, you could put in a login box or news feed.

The template layout PDF identifies the content areas on your website. While choosing a template from the Template Gallery, you downloaded the template layout PDF from the Layout Details for Layout page.

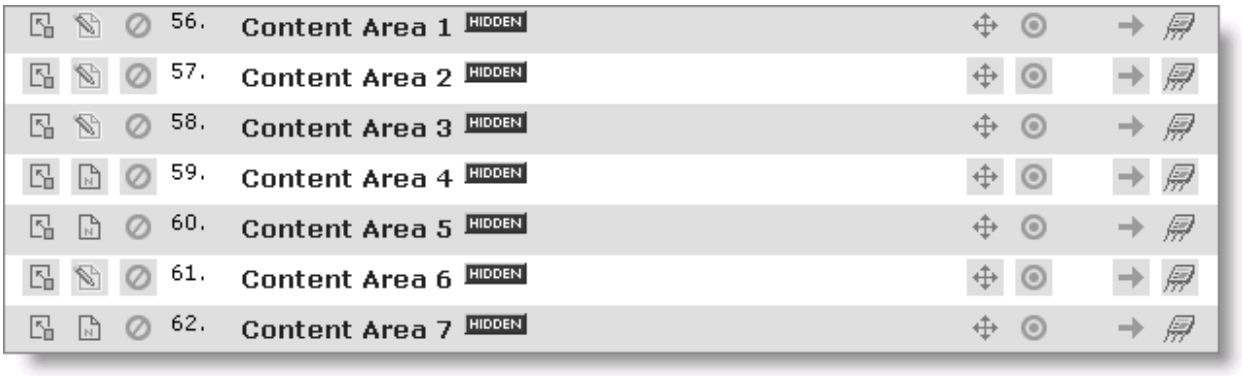
To modify the template content areas

1. Review the template layout guide PDF and choose the content areas you would like to customize.

2. From the list of navigation items for your website, find the content areas that are listed for your template marked as Hidden. If a navigation item doesn't contain a content record, you can delete or add content.
3. Edit the content record.

- Note: If you plan to insert a new graphic into the content area, you need to resize the graphic to fit the new content area.
- Note: You cannot add content areas without using ColdFusion to edit the Header, Footer, and Template files.

4. Republish the site.



Content areas marked as Hidden

Modifying the Template Style Sheet

Cascading Style Sheets (CSSs) are a simple mechanism for adding style elements to a website, including fonts, colors, and spacing. e-CM uses the CSS to control the look and feel of your website. Each template has a unique CSS. The Template Gallery does not lock you into any of the style definitions. You can modify the template CSS to suit your needs.

Templates have an associated style sheet that is identified on the template layout PDF. Each CSS contains the number of the associated template in the file name. For example, the style sheet for template 1501 is named 1501_layout.css.

To modify the CSS

1. Review the colors, font sizes, and other design elements in your website.

   Note: When picking new colors for your site, choose web-safe colors.

2. Choose the styles you plan to change. Here are some common elements you may want to change.

- Width and height of image areas
- Background colors
- Font family, size, and color
- Search Box styles
- Breadcrumb styles

3. Open the style sheet identified on the template layout PDF. The original Template Gallery style sheets are located in \Customer\AM\Templates\LayoutCatalog\[LayoutID]\CSS

   Note: If you have applied a new template, the template file will be saved to a different directory (see "Locating Template Gallery Files"), and the file name will include a date stamp.

4. Change the styles to your preferences.

5. Refresh the site.

Modifying HierMenus

Javascript HierMenus are very powerful and flexible hierarchical menu scripts that control the drop-down menu behavior on websites. The Template Gallery Layout Footer file contains a custom tag that defines the attributes for the drop-down menus on the home page. You can modify the HierMenu drop-down attributes in the footer file.

To modify the HierMenu

1. Locate the LayoutFooter ColdFusion file for your template in the Customer\AM\Templates\TemplateFooter directory.

The footer file name consists of the last saved date, the template name, and the cfm extension, example: ...1502_layoutFooter.cfm.

2. Search in the file for <TemplateDropDownRenderTag.cfm>.
3. Modify this code to change the Heir Menu font, color, background, etc.

   Note: You can adjust the X and Y cooridinates of the HierMenus from the Website Properties page under the Will the Website use pop-up windows? option. Negative values move it to the left or move it up; positive values move it to the right or move it down.
4. Save the file.

Locating Template Gallery Files

The Template Gallery wizard creates the files which comprise your website. The floor plan is an encrypted template ColdFusion file that calls on other files to build your website. Only files that control the website look and feel can be edited. Locating the correct file is critical to your success in modifying the website.

Master File Locations Set in Website Properties

The following is an example of the filename and location setup by the wizard and displayed in the Website Properties page. This is the filename and directory for the master file.

- 1501_Layout.css
  \Customer\AM\Templates\LayoutCatalog\1501\CSS

  Note: Any change made to the master files of a template will propagate to websites subsequently created using the template.

New File Locations after Reapplying a Template

Each time the wizard is run for a site, it will generate new files and new directories for the new layout. To prevent new files from overwriting files used with existing websites, the following prefix notation is appended onto certain file and directory names.

[Prefix] = [SiteName]_[LayoutID]_[DateTimeStamp]

Example of New Prefix

For example, a site was originally named MTFuji and the wizard is rerun with the layout for template 1502 on June 29, 2005 at 4:05:33 PM (server time).

- Master File Name
  [MTFuji]_[1502]_20050629T160533.css
- New Directory Name
  Customer\AM\Styles\LayoutStyles\[MTFuji]_[1502]_20050629T160533

  Note: Changes made to the timestamped file will only appear in the corresponding web-site.

Customizable Template Gallery Files

CFM Files

The layouts are described by three ColdFusion files which contain the logic and cfmodule tag calls used to render the site with its mapped navigation and content items. When a new template is applied, these files are placed in a new directory and renamed. These files are not encrypted and can be customized. The three cfm files are described below.

Layout Homepage File

The [LayoutID]_HomePage.cfm file renders the home page table which contains all of the homepage content areas.

- Master Location and Filename
  \Customer\AM\Templates\LayoutCatalog\[LayoutID]\CFM\[LayoutID]_Lay-outHomePage.cfm
- New Location and Filename
  \Customer\AM\Templates\TemplateHomepage\[SiteName]_[LayoutID]_
  [DateTimeStamp]_LayoutHomepage.cfm

Layout Header File

The [Layout]_LayoutHeader.cfm file includes the primary and secondary navigation calls and utility module calls, such as text only, breadcrumbs, and print this page. The struc-ture of the interior pages is defined by the table styles and definitions in this file. The first

table defined in this file contains the content areas that are constantly displayed at the top of the homepage and interior pages.

- Master Location and Filename
  \Customer\AM\Templates\TemplateHeader\[LayoutID]LayoutHeader.cfm
- New Location and Filename
  \Customer\AM\Templates\TemplateHeader\[SiteName]_[LayoutID]_
  [DateTimeStamp]_LayoutHeader.cfm

  Layout Footer File

  The [LayoutID]_LayoutFooter.cfm file can contain cfm module calls for content areas and utility calls for footer area utility links. The main menu on the template is controlled by the LayoutFooter file. This file contains a custom tag that defines the attributes for the primary menus. The code for the HierMenu controls the font, color, background color, etc. of the drop-down menus.

- Master Location and Filename
  \Customer\AM\Templates\TemplateFooter\[LayoutID]LayoutFooter.cfm
- New Location and Filename
  \Customer\AM\Templates\TemplateFooter\[SiteName]_[LayoutID]_
  [DateTimeStamp]_LayoutFooter.cfm

  Style Sheet CSS Files

  There are two css files for each layout, the [LayoutID]_Layout_Styles.css and the [LayoutID]_styles.css. Modify these style sheets in order to change the look and feel of the design of your website.

  Layout Styles File CSS

  The main style classes that control the site layout are located in the [LayoutID]_Layout.css file.

- Master Location and File Name
  \Customer\AM\Templates\LayoutCatalog\[LayoutID]\CSS\[LayoutID]_Layout_styles.css

- New Location and Filename
  \Customer\AM\Styles\LayoutStyles\[SiteName]_[LayoutID]_
  [DateTimeStamp]\[LayoutID]_Layout_styles.css

  Styles File

  The style elements and classes for general HTML attributes for the e-Series modules are contained in the [LayoutID]_styles.css file. To modify the default styles used by e-CM or e-Series, change the tags in this style sheet.

- Master Location and File Name
  \Customer\AM\Templates\LayoutCatalog\1501\CSS\[LayoutID]_styles.css

- New Location and Filename
  \Customer\AM\Styles\LayoutStyles\[SiteName]_[LayoutID]_
  [DateTimeStamp]\[LayoutID]_styles.css

  Layout Images File

  These images are used as filler content for the design. Some of the images are place-holders for the content in the content areas. Their widths and heights are the prescribed dimensions of each content area. Changes to the master files would affect all subsequent websites created from that template. Change the new files to modify an individual site. These images can be accessed through the e-CM Image Manager utility or changed out in the content record.

- Example Master Location and File Name
  C:\eSeries\Customer\AM\Templates\LayoutCatalog\[LayoutID]\Images\Home-Content-Area-1.gif

- Example New Location and Filename
  \Customer\AM\Images\Layout_Assets\[SiteName]_[LayoutID]_
  [DateTimeStamp]\ Home-Content-Area-1.gif

  Template Style Sheet (CSS) Definitions

  The style sheet contains definitions for the look and feel of the navigation, feature set, and site content. You will find the following items defined in the template style sheets.

  Homepage Layout Content Areas and Interior Layout Content Areas

Defines the height, width, and vertical alignment of the content areas.

Interior Look and Feel Style

Defines the column style and background color for interior page columns.

Standard Feature Set

Defines print styles, email a friend styles, search box styles, and iMIS trademark styles.

Breadcrumb Styles

Defines margin, padding, font size, color, and code for the breadcrumb feature.

Base Text-only Nav Styles

Defines color, inline display, margin, and padding for the text only navigation features.

Primary Navigation Styles

Defines margin, padding, text alignment, list style type, and text and font styles, as well as code for the primary navigation container.

Primary Navigation Styles with a Background Image

Defines margin, padding, text alignment, list style type, text and font styles, as well as image and code for the primary navigation container.

Utility Navigation Styles

Defines text alignment, color, and padding, as well as the code for container navigation.

Footer Navigation Styles

Defines text alignment, color, and padding, as well as the code for container navigation.

Base Interior Navigation Styles

Sets up defaults for all navigation levels – margin, padding, font styles, and link status colors.

Style Class Names for e-Series and e-CM

The following key style class names can be modified if elements other than those used on the primary templates need to be changed.

Key Style Class Names for e-Series

Buttonbar

- .buttonbar1 - Used in e-Events.
- .buttonbar2 - Used in e-Series Admin.
- .buttonbar3 - Used throughout e-Series. Usually has Submit, Reset, or other buttons.

ETitleBar

- .ETitleBar - Use in e-Orders.
- .EToolBar - Used throughout e-Series.
- .ETaskBar - Used throughout e-Series. Usually contains the breadcrumbs or a task list title.

ERSN

- .ERSNavBar - Used throughout e-Series when a paged record navigation is displayed.
- .ERSHeader - Used throughout e-Series.
- .EFunctionBar - Used mostly in e-Communities.

ETH and ETD Style Class Names

- .ETHRow - Used throughout e-Series.
- .ETH - Used throughout e-Series. Usually the prompt field table cell.
- .ETD - Used throughout e-Series. Usually the value field table cell.
- .ETDALT - Used throughout e-Series. Alternating row color.

Key Style Class Names for e-CM

Login

/* Content Manager Login */

.SCLoginBar,.HeaderBar

Site Search

/* Site Search */

.SEHeaderBar

Site Map

/* Site Map */

.SiteMap

a.SiteMap, a.SiteMap:link, a.SiteMap:visited, a.SiteMap:hover, a.SiteMap:visited:hover, a.SiteMapTitle, a.SiteMapTitle:link, a.SiteMapTitle:visited, a.SiteMapTitle:hover, a.SiteMapTitle:visited:hover

a.SiteMapTitle, a.SiteMapTitle:link, a.SiteMapTitle:visited, a.SiteMapTitle:hover, a.SiteMapTitle:visited:hover

.SiteMapTitleSub

.SiteMapTitleSubAlt

e-Series

e-Series Implementation

Planning Your Project

The goal of this section is to prepare you for a successful e-Series implementation.

After completing this section, you will be able to perform the following tasks:

- Describe the benefits of project planning
- Discuss the implementation phases
- Describe and implement key processes

Benefits of Project Planning

Project planning helps you set expectations and estimate the costs of implementation. With proper planning, you can:

- Calculate project costs
- Set customer expectations
- Set management expectations
- Plan and coordinate resources
- Track progress

e-Series Implementation Project Plan

Advanced Solutions International (ASI) has developed an implementation plan and methodology to ensure a smooth implementation of e-Series modules. This process parallels the process used to implement the iMIS modules. e-Series modules require the same kind of planning and forethought required for a successful iMIS implementation. You should not take shortcuts even if clients want to implement e-business solutions quickly. Consider very carefully the issues that will encourage Web visitors to use the new site.

The project plan has five major phases:

1. Business Process Review
2. Server Setup
3. Prototype Training and Configuration
4. Live Cutover
5. Continuous Improvement

All project costs relate to one of these phases. The key to a successful implementation is to manage expectations throughout all phases of the process. To accomplish this, you must present regular status reports to a designated customer staff member to review and update the project status. These meetings should occur at least bimonthly.

Proper project planning and adequate staff resources are critical to a successful e-Series module implementation. The Reseller should allocate three staff members to the implementation. These should include the following:

Project Manager - The project manager is responsible for managing project resources, preparing and modifying the project plan, tracking project status, facilitating status meetings with the client, and managing the overall project implementation.

In addition to staff resources, the project manager works with clients to access client resources. The organization should provide an operations representative to provide hands-on implementation assistance. This would include tasks such as granting security access to the server, arranging hardware purchases, maintaining liaison with the ISP, configuring firewall or proxy servers to permit access to the site, and configuring software to match the identified business processes. The project manager should be in continual contact with the organization's decision-makers and managers to help determine and manage the expectations for the new e-Series site. This contact should be initiated at the very beginning of the project.

Consultant - The consultant should have strong iMIS experience and training in the setup and configuration of e-Series modules. The consultant is responsible for analyzing and prototyping key processes with key client personnel, just as with the iMIS products. The

consultant should be skilled in analyzing output requirements, documenting back-office processes for e-Series modules, and training administrators and customers.

Technical Consultant - The technical consultant should be experienced with Windows NT Server, Windows 2000 Server, SQL Server, and Macromedia ColdFusion. The technical consultant must ensure that the software and hardware requirements for e-Series modules are in place before setting up and configuring the application.

Phase I - Business Process Review

Before the kickoff meeting, ASI will provide an implementation survey to the client team to answer baseline questions about project goals and intentions. The team will develop a needs analysis from information gathered from the survey.

The kickoff meeting with the client team and the Reseller team is crucial to the project's success. Everyone involved in the project should be aware of the project's goals and issues. The kickoff meeting is the time to set realistic expectations. After the meeting, the Reseller team should set up meetings with key department managers to gather the information for the needs analysis.

Phase I time estimates

e-Series Implementation Survey	8 hours (including report of findings)
Kickoff meeting	2 hours
Needs Analysis	8 hours for each module

Phase II - Server Setup

In this phase, the entire hardware and software infrastructure is installed and tested. There are two sub-phases in Phase II:

1. First Sub-phase - This sub-phase involves reviewing and identifying the hardware and software requirements with the client and determining elements of the project, such as the location of servers, the relationship with the ISP, and the telecommunications requirements. During this phase, the organization will order software, hardware, and telecommunications lines. The telecommunications setup should be decided upon as early

as possible because there often are weeks-long or months-long lead times for the installation of these lines, especially for T1 lines.

2. Second Sub-phase - In this sub-phase, the Reseller sets up and installs the software on the webserver. Microsoft provides an extensive checklist for the installation of this software. This checklist should be followed to the letter. Although Site Server is very robust after it is installed, you must adhere to these guidelines when integrating it with other system software.

   You can install ColdFusion and the e-Series modules quickly if the server is properly prepared with the required software.

   The client and the Reseller usually share in the assignment of resources during this phase. Typically, the client obtains the server and arranges the installation of telecommunications lines and server software. The Reseller installs e-Series modules on the prepared server. However, some Resellers with networking and hardware resources may provide a turnkey installation.

   Carefully consider the issue of firewalls and proxy servers. ASI currently does not offer guidance on configuring these servers because there are so many vendors with both hardware and software solutions. A technician knowledgeable with the client's firewall or proxy server should be available to open a channel for traffic to get through the firewall. Depending upon the configuration, the SQL database server and/or the webserver may be inside the firewall. Whatever the configuration, the channel through the firewall must be open to allow either the ODBC connection from the webserver to the SQL database server, or the connection from the webserver to the ISP.

   Phase II time estimates

- Review hardware and software requirements with client 4 hours
- Order required hardware, telecommunications lines, and software 4 hours
- Set up Windows Server 8 hours
- Set up and test ColdFusion 2 hours
- Set up and test the ODBC link to the SQL server 2 hours
- Install e-Series modules and perform rough configuration 8 hours

Phase III - Prototype Training and Configuration

In this phase, the applications consultant will sit down with the client's operations contact and key staff to discuss site management. Typically, these key personnel are membership managers, meeting directors, database administrators, marketing personnel, and so forth. Because their expectations are the ones that must be met, these managers should be involved in the project. Furthermore, their expectations should reflect those of the constituents who will use the site, and their expectations based on their user experience and the flow of the website.

Phase III time estimates

• Hands-on survey of module with key personnel	1 hour per module
• Review of implementation survey and needs analysis for department relative to features of the e-Series module	2 hours per module
• Discuss and implement look and feel issues with marketing and/or design team	8 hours *
• Maintain issues list and write up findings	4 hours per module
• Run configuration reports as part of documentation	2 hours
• Complete setup of each module	8 hours per module
• Document all setup parameters and any alterations to pages or scripting. Document back office procedures for credit card processing, cancellations, password assignment, and so forth	8-16 hours
• Caution client about changes that may affect the upgrade path. Test processes and transactions on test database; obtain client signoff	8-16 hours

*Site design requirements vary greatly from client to client. e-Series modules provide many flexible design options. The hours listed are for a minimal site dress-up.

Phase IV - Transition from Production Database to Live on the Net

In this phase, you will move the configured site to the production database (e-Series implementation), review the site, and finally, open it to the Internet. The following steps involve connecting the site with the live production database and verifying that the custom pages, colors, and configuration parameters meet the client's requirements. It is the client's responsibility to market the site and to inform constituents, members, and/or the public that the site is up and running and why they should log on. However, the Reseller should encourage the client to develop a site- marketing plan.

Phase IV time estimates

- Move e-Series-related tables from test to production database 4 hours
- Redirect to the production database 4 hours
- Review site to ensure that all elements are in place 4 hours
- Publicize and open to the Internet

Phase V - Continuous Improvement

Plan on at least eight hours of post-implementation and technical support. Caution the client not to make any alterations or changes to the site infrastructure, such as changes to ColdFusion, the IP address, or the network without consulting the Reseller. Most site failures are due to “do-it-yourself” alterations to enhance the site or to solve perceived problems. A website requires a close interaction of hardware and software to stay up and running. Casual changes can break the chain that keeps the site functional.

e-Series Installation Requirements

The following resources are required to set up your site:

Webserver

You must install ColdFusion, e-Series, and Microsoft Internet Information Services (IIS) software on the webserver. The webserver can reside at your location or at a remote location, depending on your needs.

Database Server

Use a server with MS SQL Server (MSSQL) or Sybase Adaptive Server Anywhere (SASA) software to host the iMIS database.

ColdFusion

ColdFusion is the application that runs e-Series. With ColdFusion, you write HTML pages marked-up with special tags and logic in ColdFusion Markup Language (CFML). When a browser requests a ColdFusion page, the webserver passes the page to the ColdFusion server which processes the ColdFusion tags and sends the results back to the webserver as HTML. The webserver merges that output with the HTML on the original page and returns it to the browser.

Server Configuration

When setting up your e-Series site, you must determine where your site will be hosted. There are four common options for hosting a website:

- The organization hosts the webserver
- Co-location
- Dedicated server
- Virtual hosts

Organizationhosted webserver

With this configuration, an organization hosts both the database server and the web-server.

To host the webserver at your site, you must have a high-speed Internet connection and an Internet service provider (ISP). You must purchase, install, and configure com-munications hardware and pay monthly connection fees.

This option gives you complete control over the webserver because it is located at your site. You are responsible for all software backups, security, upgrades, monitoring, and other security procedures.

Best Practice: Host both the database and the webserver on separate servers.

Advantages: With this option you have complete control over the webserver.

Disadvantages: This option is expensive because you must purchase the server and the communications equipment, pay for high-speed Internet access, and pay staff to maintain the webserver. In addition, rebooting your server will take down the website unless you have more than one server.

Colocation

With this configuration, you own and maintain the database server, but the webserver resides at the ISP's location.

If you select this option, you must purchase and configure your own webserver, but the server resides at the ISP. The server is connected to the ISP's network, and the ISP takes care of the high-speed Internet connection.

This hosting option allows you to have a high-speed Internet connection, but is much less expensive than paying for your own in-house, dedicated connection.

With the co-location option, your organization administers the machine. The ISP may monitor the machine's activity and notify you when the network is down, but is up to you to provide backups, upgrades, and security.

The ISP may allow you a few hours a month to physically visit its site to perform upgrades or swap out backup tapes.

Advantages: You have control over your webserver.

Disadvantages: You have to purchase and maintain the machine, even though the hardware is offsite. Most ISPs use Linux or UNIX platforms, which are not compatible with Windows platforms.

Dedicated server

With this hosting option, the webserver is owned by, maintained by, and resides at the ISP. A dedicated server is considered the preferred setup for server configuration.

This scenario is similar to co-location, except that the ISP provides the dedicated server for your use. The ISP configures the server and provides ongoing maintenance, such as creating user accounts, performing backups, monitoring the system, and producing

usage reports. Most ISPs provide monitoring services seven days a week, 24 hours a day.

With a dedicated server, you populate the webpages and programs and pay the ISP for their services.

This option is good for organizations that want to do their own Web development, but not their own system administration.

Advantages: Although you do not have to purchase hardware, you still have full control over the server content.

Disadvantages: The hardware is offsite.

Virtual host

With this hosting option, you share a server with several other sites. The server is owned by, maintained by, and resides at the ISP. You have your own domain name, but you share a server (and server resources) with several other sites. However, it appears to your customers that you have a dedicated site. This option is much cheaper than having a dedicated server.

Because you are sharing a server with other sites, you may be limited in the types of applications you can run. You also do not have as much control over software versions and upgrades, since these affect all sites hosted on this server. You also may be limited in the types of e-commerce solutions available to you.

Advantages: This is an inexpensive way to have your own domain name without having to maintain a server.

Disadvantages: The server is shared with other people. You have limited access to the server.

Installation Checklist

The following checklist includes the steps you should follow when installing an e-Series site:

1. Verify that the server has all of the required software.

2. Download the latest e-Series code, and review the release documentation.
3. Install e-Series:

- In your browser options under Check for newer versions of stored pages, enable Every visit to the page.
- Install e-Series on your webserver:
- Create an e-Series folder in the root directory (such as C:\e-Series), and unzip the files (make sure that all files are visible and that none are hidden).
- Copy all files from the C:\e-Series\Customer\Source\CustomTags folder into the C:\CFusionMX\CustomTags folder.
- Extract the contents of the CFX_PFPro_Java.zip file.
- In MS Internet Information Server (IIS), set up your website by entering the complete path to the directory.
- Manually create a SQL Server login for e-Series and ColdFusion to use for ODBC and JDBC connections.
- Create an ODBC data source for e-Series using the CF_Customer username and password.

4. Configure ColdFusion:

- Register the TCPClient and PayFlowPro custom tags.
- Connect ColdFusion to your data source.
- Configure ColdFusion settings:
- Change the client variable storage from the Registry to a new database.
- Configure your mail server settings.
- Map ColdFusion to your source directory.
- (optional) Enable ColdFusion debugging.

5. Run the e-Serieswizards and scripts:
   - Run the Application wizard.
   - Run the Script wizard.
   - Run the SQL security script.
6. Test your e-Series installation.

   Note: All e-Series site administrators should administer their site with the latest version of Internet Explorer.
7. Secure the webserver.
8. Secure the SQL server.
9. Configure SSL security.
10. Prepare to go live.

Installing and upgrading e-Series/e-CM

Note: This main procedure appears identically in both the e-Series and the e-CM reference guides.

To install or upgrade e-Series and e-CM

To prepare for installation

1. Back up your customized files so that you can reapply the customizations after upgrading e-Series. All customizations are overwritten during the upgrade process.
2. Ensure that you have completed a successful installation or upgrade of iMIS 15 on the appserver where you plan to install e-Series and e-CM.
   - If you performed a Custom installation of iMIS 15, you must have chosen e-Series as one of the options to install (The e-Series zip file is automatically installed as part of a Complete installation.)
   - (e-CM only) You must have performed a Custom installation of iMIS 15, and you must

have chosen Publishing Service as one of the options (Publishing Service is required for e-CM and is not part of a Complete installation.)

Caution! If you performed a Complete installation, or you performed a Custom installation of iMIS 15 and did not choose these listed Optional Components, then you must first install these components before performing this procedure. You can easily add these components to an already installed instance of iMIS 15 by choosing Start > Control Panel > Add or Remove Programs. From the list of Currently installed programs, select iMIS15 and click Change/Remove. When the Welcome page appears, select Modify and click Next to proceed.

3. Ensure that you have planned your iMIS architecture and have ensured the prerequisite conditions for all hosts and clients.
4. Ensure that a version of ColdFusion supported by this version of iMIS is installed on the iMIS appserver.
5. Ensure that a version of iBO for COM supported by this version of iMIS is installed on the appserver.
6. Ensure that a mail server has been configured in ColdFusion.
7. (e-CM only) Ensure that you have configured ColdFusion to redirect the storage of client variables to a database instead of to the registry of the appserver.
8. If you installed ColdFusion in a location other than the root (C:\CFusionMX), adapt the affected file paths below accordingly.
9. Ensure that the Windows Explorer folder options on the host are set so that all files are visible in Windows Explorer.
10. Ensure that Internet Explorer's Temporary Internet File options on the host are set so that IE checks for newer versions of stored pages every time you visit the webpage.

    To install or upgrade e-Series and e-CM into an iMIS 15 environment

Note: Some steps pertain only to e-Series or to e-CM. If you are not installing both into your iMIS 15 environment, you can skip the steps that are marked for the product that you are not installing.

1. (upgrades only) Back up all files located in your current e-Series directory. Any files that you customized in the \Customer folder will be overwritten during this procedure. You must have access to your customized versions of these files so that you can reapply your customizations after upgrading e-Series.
2. Locate the e-Series self-extracting zip file (eSeries.exe) on the appserver, which is in the folder C:\Program Files\ASI\iMIS15\eSeries.CF.

   Note: If this folder does not exist, you performed a Custom installation of iMIS 15 and did not specify to install e-Series. You must Modify the installation of iMIS 15 (Start > Control Panel > Add or Remove Programs > iMIS15, and click Change/Remove) to install the e-Series optional component before continuing this procedure.
3. Run the eSeries.exe file.

   The WinZip Self-Extractor window appears.
4. Click Unzip without changing any of the default settings.

   A C:\eSeries\ folder is created on the appserver.
5. (e-Series only) Copy all files from the C:\eSeries\Customer\Source\CustomTags folder to the C:\CFusionMX\CustomTags folder.
6. (upgrades only) If you are not using the iMISpublic application in your iMIS 15 environment, you must slightly modify the instructions in all of the following steps. For any step that refers to the iMISpublic application's virtual directory in IIS or the corresponding local path in the file system, you must instead substitute your current e-Series virtual directory and local path.

   Caution! If you are using the iMISpublic application in your iMIS 15 environment, then you must follow the remaining steps exactly, without substitution, to ensure that e-Series and e-CM are properly integrated with the iMISpublic application.

7. Use IIS Manager to locate the file system folder that contains your iMISpublic application files.

- Open IIS Manager and expand the folder tree to display the folders beneath the Default Web Site.
- Right-click the iMISpublic application and choose Properties.

  The Properties window appears.
- Write down the Local Path value that is displayed in the Virtual Directory tab. (This is C:\Program Files\ASI\iMIS15\iMIS_public by default.)

8. Move the entire contents from the C:\eSeries\Customer folder to the file system folder that contains the root of your virtual directory for the iMISpublic application (for example, to C:\Program Files\ASI\iMIS15\iMIS_public). If any file overwrite warnings are displayed, click Yes to All to approve the overwrites.
9. (e-CM only) Edit the IIS default documents and custom errors for the iMISpublic application.

- Open IIS Manager and expand the folder tree to display the folders beneath the Default Web Site.
- Right-click the iMISpublic application and choose Properties.

  The Properties window appears.
- On the Documents tab, click Add and specify the file name Template.cfm.
- Click OK and then click Move Up to position the Template.cfm file at the top of the list.
- On the Custom Errors tab, modify the error handler for 403;14 as follows:
- Message type: Select URL
- URL: Enter /iMISpublic/AM/404ErrorHandler.cfm (Assuming your iMISpublic application uses the default name. If you specified a different name for the iMISpublic application, use that name accordingly in the URL.)
- On the Custom Errors tab, modify the error handler for 404 as follows:

- Message type: Select URL
- URL: Enter /iMISpublic/AM/404ErrorHandler.cfm (Assuming your iMISpublic application uses the default name. If you specified a different name for the iMISpublic application, use that name accordingly in the URL.)
- Click OK.

10. Modify a key in the iMISpublic application's web.config file to prevent issues that can occur if e-Content Manager is not being used to customize e-Series or iMIS 15 Public view content.

    Note: Skip this step if you are not using the iMISpublic application.

    - Open IIS Manager and expand the folder tree to display the folders beneath the Default Web Site.
    - Right-click the iMISpublic application and choose Properties.

      The Properties window appears.
    - On the ASP.NET tab, click Edit Configuration.

      The ASP.NET Configuration Settings window appears.
    - On the General tab, in the Application Settings area, edit the EnableContentManager key to be true.
    - Click OK.

11. Create a SQL Server login for e-Series and ColdFusion to use for ODBC and JDBC connections.

    Caution! Do not use the Create_CF_Login_For_Customer.sql script, as in previous releases. Instead, manually create the SQL Server login as follows.

    - Open SQL Server Management Studio and log onto your iMIS database server host.
    - In the Object Explorer pane, collapse the Databases folder so that you can locate the Security folder for the host itself. (As opposed to the Security folder for a specific

database).

- Right-click the host's Security folder and choose New > Login.

  The Login - New window appears.

- In the Login name field, specify a meaningful name for this login so that other database administrators will recognize it as a special login used for e-Series and ColdFusion data sources (for example, CF_ESERIES).
- Select SQL Server authentication and specify a strong password for the new login.
- Record this login name and password for safekeeping. You will need these at several points in the process of installing and configuring e-Series and ColdFusion.
- If the following checkboxes are displayed on the window (this depends on whether the database server supports mixed authentication), set them as follows:
- Enforce password policy - Select this checkbox.
- Enforce password expiration - Clear this checkbox.
- User must change password at next login - Clear this checkbox.
- From the Default database field, select your iMIS 15 database.
- Click OK.
- In the Object Explorer pane, expand the Databases folder so that you can locate your iMIS database.
- Expand the node for your iMIS 15 database so that you can locate the database's Security folder.
- Right-click your database's Security folder and choose New > User.

  The Database User - New window appears.

- In the User Name field, enter the name of the SQL Server login that you defined for use by e-Series and ColdFusion (for example, CF_ESERIES).

- Select Login name and in the associated field, enter the name of the SQL Server login that you defined for use by e-Series and ColdFusion (for example, CF_ESERIES).
- In the Owned Schemas list, select the db_owner checkbox.
- Click OK.

12. (e-Series only) Create an ODBC data source for the e-Series connection to the iMIS 15 database.
    - Choose Start > Administrative Tools > Data Sources (ODBC).

      The ODBC Data Source Administrator window appears.
    - On the System DSN tab, click Add.

      The Create New Data Source window appears.
    - From the list, select SQL Server and click Finish.

      The Create a New Data Source to SQL Server wizard appears.
    - In the Name field, specify a meaningful name such as e-Series. You may optionally specify a Description too.
    - From the Server drop-down list, select the SQL Server host that contains your iMIS 15 database.
    - Click Next.

      The second page of the wizard appears.
    - Select With SQL Server authentication using….
    - Click Client Configuration.

      The Add Network Library Configuration window appears.
    - From the Network libraries options, select TCP/IP.
    - Click OK.

      Your focus returns to the Create a New Data Source to SQL Server window.

- Select the Connect to SQL Server to obtain… checkbox.
- In the Login ID field, enter the name of the SQL Server login that you defined for use by e-Series and ColdFusion (for example, CF_ESERIES).
- In the Password field, enter the password that you defined for the SQL Server login that you defined for use by e-Series and ColdFusion.
- Click Next.

  The third page of the wizard appears.
- Clear the Use ANSI quoted identifiers checkbox.
- Clear the Use ANSI nulls, paddings and warnings checkbox.
- Click Next.

  The fourth page of the wizard appears.
- Select the Perform translation for character data checkbox.
- Click Finish.

  The ODBC Microsoft SQL Server Setup window appears.
- Click Test Data Source.

  If the test completes successfully, your data source for e-Series and ColdFusion is working properly.

13. (e-CM only) Create a JDBC data source for the e-CM connection to the iMIS 15 database.

- In ColdFusion Administrator, go to Data Sources.
- From the drop-down list of drivers, select Microsoft SQL Server.
- Click Add and specify the connection information for the SQL Server login that you defined for use by e-Series and ColdFusion in a preceding step.

- Continue with the section Configuring ColdFusion and all remaining implementation sections of the e-Series and/or e-CM references.
- (upgrades only) Reapply all customizations to your e-Series and e-CM content as needed.
- If you are using e-CM alongside iMIS 15.1 and later releases, you must make some modifications to the master page of every existing website that is set up to be an ASP.NET website. These modifications ensure that the websites will work properly in the 15.1 environment (and later releases). For more information, refer to To modify master pages for iMIS 15.1 and later.

Configuring ColdFusion

The goal of this section is for you to gain the knowledge and skills needed for configuring ColdFusion.

After completing this section, you will be able to perform the following tasks:

- Register custom tags
- Connect ColdFusion to a data source
- Configure ColdFusion settings
- Map ColdFusion to the source directory
- Enable ColdFusion debugging

Registering Custom Tags

You must register the custom tags for ColdFusion to interpret SQL commands.

To register the TCPClient custom tag

You must register the CFX_TCPClient custom tag to verify the connection to the PayPal server.

1. Log in to ColdFusion Administrator.

2. Under Extensions, select CFX Tags to display the CFX Tags page.
3. Click Register C++ CFX to display the Add/Edit C++ CFX Tag page:

- Enter CFX_TCPClient for the Tag Name.
- Browse to the Server Library (.dll). For example, C:\C-fusionMX\CustomTags\TCPClient.dll).
- Enter ProcessTagRequest for the Procedure.
- Enable Keep Library Loaded.
- Enter a Description.

4. Click Submit to return to the CFX Tags page. The tag displays under Registered CFX Tags.

Connecting ColdFusion to a Data Source

ColdFusion requires a connection to a data source for e-Series to update your database.

To connect ColdFusion to a data source

Before connecting ColdFusion to a data source, make sure an ODBC data source has been created on the server.

1. Log in to ColdFusion Administrator.
2. Under Data & Services, select Data Sources to display the Data Sources page.
3. Add a new data source:

- In the Data Source Name field, enter the name of the data source created on the server for your e-Series installation.
- Select a Driver. (For combined e-Series and e-CM sites, you must select Microsoft SQL Server for the driver.)
- Click Add to open the Data Source Connection page (page name varies according to the Driver selected).

4. Click Show Advanced Settings to expand the page and view all connection options.
5. Enter the CF_Customer Username and Password.
6. (optional) For MSDE, limit simultaneous connections to five users:

- Enable Limit Connections.
- Restrict connections to 5.

7. Click Submit to update the data source and return to the Data Sources page. ColdFusion automatically verifies the connection (indicated by the Status of the data source). To verify all data source connections, click Verify All Connections.

Configuring ColdFusion Settings

e-Series requires the configuration of several ColdFusion settings.

To change variable storage from the Registry to a database

e-Series uses ColdFusion application and session variables. By default, ColdFusion stores client variables in the Windows registry for a period of 90 days. However, storing application and session variables in the registry may cause the registry to fill up, which can cause ColdFusion applications to stop and can seriously affect the performance of the Windows server. To prevent this, all variables should be stored in a table in a SQL Server or Access database using ODBC.

1. Create a new empty database using MS SQL Server or MS Access. Avoid using your iMIS database.
2. Create an ODBC data source named CFVariables that points to your new empty database. Use the administrator login without using a password, and test the data source connection.
3. Log in to ColdFusion Administrator.
4. Connect ColdFusion to the CFVariables data source.
5. Under Server Settings, select Client Variables to display the Client Variables page.

6. Under Select Data Source to Add as Client Store, select CFVariables from the drop-down list, and click Add to open the Add/Edit Client Store page.
7. Enable the following options:

- Create Client database tables (can be run only once).
- Purge data for clients that remain unvisited for xxx days (2-5 days is recommended).
- Click Submit Changes to add the data source and return to the Client Variables page.

8. Select CFVariables as the default storage mechanism for client sessions, and click Apply. (Do not select the registry as the default storage mechanism for client sessions.)
9. In SQL, give the CF_Customer user full permission for the CFVariables database.
10. Return to the CFVariables OBDC data source created in Step 2, and change the login and password to CF_Customer.

    Note: For SQL Server, it is not necessary to change the login in the ODBC data source because the password is not saved in the data source (assuming "sa" password is not blank).
11. In ColdFusion Administrator on the Data Sources page, select CFVariables to edit the data source connection, and change the Username and Password.

    Note: If you delete the default database or truncate tables after you set them, you will not be able to get back into ColdFusion.

    To configure mail server settings

    For e-Series to connect to your mail server, you must enter the mail server's IP address in ColdFusion. If a customer tries to register for a meeting or edit their record and the mail server's address is not populated, an error message displays:

    No SMTP Server Specified for CFMAIL.

    Note: The mail server IP address does not have to be a valid address until the e-Series site is public.

1. Log in to ColdFusion Administrator.

2. Under Server Settings, select Mail to display the Mail Settings page.
3. Enter the Mail Server IP address.
4. (optional) Accept the default Server Port, or enter a different one.
5. Enter the number of seconds for the Connection Timeout (the time ColdFusion should wait for a response from the mail server).
6. Click Submit Changes.

Mapping ColdFusion to the Source Directory

You must map ColdFusion to the source directory, which contains the encrypted business logic code for e-Series modules.

To map ColdFusion to the source directory

1. Log in to ColdFusion Administrator.
2. Under Server Settings, select Mappings to display the ColdFusion Mappings page.
3. In the Logical Path field, enter the IP Address of the machine where the site files are being staged. Because we are using a virtual directory for the customer site, add /eSeries (or your site name) after the IP address.
4. Enter the Directory Path by browsing to the eSeries folder. (The name in the directory path must match the name of the folder exactly.)
5. Click Update Mapping.

Enabling ColdFusion Debugging (optional)

The debugging features of ColdFusion are helpful when you are trying to determine the cause of problems that may occur when you install e-Series.

To enable ColdFusion debugging

1. Log in to ColdFusion Administrator.
2. Under Debugging & Logging, select Debugging Settings to display the Debugging Settings page.

3. Enable the following options:

- Enable Debugging.
- Enable Performance Monitoring.

4. Click Submit Changes.

Running e-Series Wizards and Scripts

Running e-Series Wizards

Included with e-Series code are script wizards that automate and speed up the process of building a customer site. The wizards, which are executed through a browser, run scripts that populate tables, create default security groups, and create style options. You should run the wizards only once per site. In fact, it may be a good idea to remove the wizards after you run them.

Note: All e-Series site administrators should administer their site with the latest version of the Internet Explorer browser.

To run e-Series wizards

You should run the wizards only once per site. Always make a backup of your iMIS database before running the wizards.

Note: The iMIS SQL Query utility cannot use any stored procedures or the TRUNCATE, DROP, DELTE, or CMDSHELL commands.

1. Install e-Series.
2. Configure ColdFusion.
3. Open your browser, and enter the following URL to display the Quick Start Wizard page: http://<yourIPAddress>/e-Series/wizards/index.cfm.
4. Run the applicable wizards.

   Quick Start Wizard page

   Open your browser, and enter <yourIPAddress>/e-Series/wizards/index.cfm

   ScriptWiz

Use the ScriptWiz (Script wizard) to set up security tables, security groups, security modes, security filters, style options, Gen_Descriptions and Gen_Tables, member types, system parameters, and states and countries against the database.

AppWiz

Use the AppWiz (Application wizard) to create the Default document and the Default Static Content document. The AppWiz automates the application.cfm file-editing process for the website.

Note: The application wizard should be used when making changes to the application.cfm file because a copy of this file is propagated to each directory in the source folder to support jumping directly to a page in the site.

CM Setup

Select to open the Active Matter Content Management Setup Wizard.

Home

This link takes you back to the Quick Start Wizard page.

To run the Application wizard

The only wizards you must run to activate the customer site are the AppWiz and the ScriptWiz. The application.cfm file is created when you run the AppWiz. This file gives ColdFusion the instructions to run e-Series.

1. On the Quick Start Wizard page, select AppWiz to display the Create Application.cfm page.
2. In the Datasource field, enter the name of the ODBC data source that you defined for the e-Series connection to the iMIS database.
3. In the Database Connection Username and the Database Connection Password fields, enter the name and password of the SQL Server login that you defined for use by e-Series and ColdFusion

4. In the iMIS System Admin Username and iMIS System Admin Password fields, enter your iMIS MANAGER logon name and corresponding password. This user record is needed to enable e-Series to interact with iMIS webservice methods. This logon information is encrypted when you execute the Application Wizard.
5. (iMIS 15 environments) In the iMIS Application Server URL field, enter the iMIS virtual root URL that you use to connect to iMIS with iMIS Desktop (for example, http://appserverName/imis15). This URL is used to enable access to the iMIS webservice for unified logons.
6. In the IP, DNS or Machine name field, enter the URL to your website virtual root.
   - (iMIS 15 environments) This should be the Public virtual root URL that you use to connect a web client to the iMIS public website (for example, http://appserverName/imispublic).
   - (iMIS 10.6 or earlier environments) This should be the virtual root URL that you use to connect a web browser to your e-Series website (for example, http://serverName/eSeries).
7. In the Customer Directory Path field, enter the path to your e-Series Customer folder.
   - (iMIS 15 environments) This path is C:\Program Files\ASI\iMIS15\iMIS_public.
   - (iMIS 10.6 or earlier environments) This path is C:\eSeries\Customer.
8. In the Webmaster Email field, enter the email address that should be the target of the webmaster contact hyperlink at the bottom of each page.
9. In the Contact Email field, enter the email address that should be the target of the information contact hyperlink at the bottom of each page.
10. From the Website Type options, select Combined eSeries & Content Management if you have a license to e-CM. Otherwise, select eSeries Only.
11. If this is a first-time installation, enable the Create Default Document option, and enter default.htm. (Make sure default.htm is specified for that site under the Document tab. When you enable this option, the Application wizard creates the Default document, which is the actual website.)

12. If this is an upgrade from an earlier version of e-Series, disable the Create Default Document option.
13. If this is a first-time installation, enable the Create Default Content option. When you enable this option, the Application wizard creates the Default Static Content document.
14. If this is an upgrade from an earlier version of e-Series, disable the Create Default Content option. If you enable the option, you will re-create your Static Content document and remove all customized files.
15. (Communities only) Enable the Registry Time Stamps option to build community e-mail notification with the server's time.
16. (Communities and Verity Indexing only) Enable the Create Scheduled Tasks option to create scheduled tasks in ColdFusion Administrator.
17. Click Continue to execute the Application wizard.
18. The Application wizard notifies you when the files are built. Click OK.

Script Wizard

Script wizards set up security tables, security groups, security modes, security filters, style options, Gen_Descriptions and Gen_Tables, Member Types, system parameters, and states and countries in the selected database for a selected application type. Following is list of the Script wizards and a brief description of what each wizard does.

Note: You can modify scripts if you need to run only part of a script.

Security Tables

Run this script to insert the records for the security filters.

Security Groups

Run this script to insert the default security groups: Administrator, Anonymous, Remote Chapter, Web Developers, and Site Administrators.

Security Modes

Run this script to insert the security modes: Browse, Search, Insert, Edit, and Delete.

Security Filters

Note: You must run the Administrator and Anonymous security filters; the others are optional.

- Administrator - Run this script to insert the security filters for the Administrator security group.
- Anonymous - Run this script to insert the security filters for the Anonymous security group.
- RemoteChapter - (optional) Run this script to insert security filters for the Remote Chapter security group.
- WebDevelopers - (optional) Run this script to insert security filters for the Web Developers security group.
- SiteAdministrators - (optional) Run this script to insert security filters for the Site Administrators security group
- Activity - (optional) Run this script to insert security filters for Activities.
- Custom Windows - (optional) Run this script to populate security tables and insert security filters for custom windows.

Style Options

Run this script to insert the records of the default style options.

Name Address Insert

If you are installing e-Series without iMIS, run this script wizard to insert a single record into the Name_Address and Name tables.

Name Security

If you are installing e-Series without iMIS, run this script to insert logins and passwords into the Name_Security table.

Gen Descriptions

Run this script to insert records that are related to Lookups into the Gen_Descriptions and Gen_Tables.

Member Types

If you are installing e-Series without iMIS, run the Web Member Type script.

Do not run this script if you are using e-Series with iMIS. If you do, it overwrites the existing Member Types in the iMIS database.

To run the Script wizard

1. On the Quick Start Wizard page, select ScriptWiz to display the Available ODBC Data Sources page.
2. Enter your Datasource.
3. Select the Application Type: e-Series SQL.

   Note: Run the same Script wizards in order, and run them all the way through. For example, do not change your data source and application type while running scripts.
4. Click Show Scripts to display the list of available scripts.

   Note: You must run the scripts one at a time. Follow the red arrow to run them in sequence so that you do not overlook any of the scripts.
5. Select the script you want to run, and the Selected Script Ready to Run window will open.

   Note: You can edit the scripts. For example, you may want to remove the WebDeveloper security filter value by simply removing it from the script.
6. Click Run This Script. A message displays if the script has run successfully.
7. Click OK.
8. Repeat the steps for each script.

Available Scripts list

Running SQL Security Scripts

When running the e-Series installation Script wizards, records, filters, and tables are inserted, and default security groups, style options, and several other items are created for the site.

The Security_Triggers_SQL.sql script (applicable only for SQL databases licensed for e-Series) sets up the application so that when security groups, products/activities, and custom windows are created, filters are created.

For example, when you define a new security group, a trigger directs the application to create the filters for the security detail settings for the new group. When this is complete, you can configure the new group's security detail.

By running the Update_Security_Cursors.sql script, changes made in iMIS are updated in e-Series. For example, if a new table or a new activity is added or deleted in iMIS, that change is reflected in e-Series if you have run the Update_Security_Cursors.sql script. Run this script each time you add or delete a table in iMIS.

To run SQL security scripts (MSSQL)

When iMIS is upgraded, the Security_Triggers_SQL.sql script runs automatically on SQL databases licensed for e-Series.

If the iMIS tables are rebuilt after iMIS is upgraded, the Security_Triggers_SQL.sql script must be run manually after each rebuild of the iMIS tables.

Note: You must run these scripts for each customer database. Do not run them on the master database.

1. Run the Security_Triggers_SQL.sql script on the Server Table Status window in iMIS (from Utilities, select Table Analysis, and click Make Triggers).
2. Run the Update_Security_Cursors.sql script in SQL Query Analyzer:

- Open Microsoft SQL Query Analyzer (Start> Programs> Microsoft SQL Server).
- Select the Load SQL Script folder at the top of the window.
- Navigate to the \Source\Scripts directory.
- Run the script.
- Close SQL Query Analyzer.

Test the installation

Now that you have installed e-Series, go to your website to test the installation.

To view your security filters

If you want to view the security filters set on each screen, add this string to the url.

&showfilters=yes

Securing the Webserver

The goal of this section is for you to gain the knowledge and skills needed to install an e-Series host site.

After completing this section, you will be able to:

- Set properties for the ScriptContent directory
- Set properties for the Source directory
- Set properties for the StaticContent directory
- Set properties for the Wizards directory

Setting Directory Properties

After installing your site, you need to secure the webserver. Starting in IIS, set up the correct permissions for the ScriptContent, Source, StaticContent, and Wizards directories.

To set properties in the ScriptContent directory

1. In IIS, navigate to the eSeries\Customer folder. Open the folder and highlight the ScriptContent folder.
2. Right-click the ScriptContent folder and select Properties. The ScriptContent Properties window opens.
3. Select the Directory tab.

- Enable the Script source access, Read, and Log visits options.
- Select Scripts only from the Execute Permissions drop-down list.

4. Click OK.

To set properties in the Source directory

1. In IIS, navigate to the eSeries\Customer folder. Open the folder and highlight the Source folder.
2. Right-click the Source folder and select Properties. The Source Properties window opens.
3. Select the Directory tab.

- Enable the Log visits and Index this resource options.
- Select Scripts and Executables from the Execute Permissions drop-down list.

Note: To properly display images, turn on READ permissions for the Source/Images directory in IIS. An image included in this folder is warning.gif.

4. Click OK.

To set the properties for the StaticContent directory

1. In IIS, navigate to the eSeries\Customer folder. Open the folder and highlight the StaticContent folder.
2. Right-click the StaticContent folder and select Properties to open the StaticContent Properties window.
3. Select the Directory tab:

- Enable the Read and Log Visits options.
- Select None from the Execute Permissions drop-down list.

4. Click OK.

To set the properties for the Wizards directory

It is very important that no one except the administrator should have access to the Wizards directory. If someone else has access to this directory, they are capable of running scripts and damaging the iMIS database.

1. In IIS, navigate to the eSeries\Customer folder. Open the folder and highlight the Wizards folder.
2. Right-click the Wizards folder and select Properties to open the Wizards Properties window.
3. Disable all permissions.
4. Set the Execute Permissions drop-down list to None.
5. Click OK.

Alternatives

Two alternative methods would require that the administrator have direct or remote access to the Webserver to make the scripts available:

- Back up and remove the Wizards directory.
- Leave the read and execute permissions enabled. Set SQL Server security, such that the user would be prompted for a database login and password when attempting to access the Wizards directory.

Securing the SQL Server

The goal of this section is for you to gain the knowledge and skills to be able to secure the SQL database server.

After completing this section, you will be able to:

- Enable encryption on MSSQL and SASA
- Enable encryption on the webserver

Overview of securing the database

After you have installed your website, the next step is to secure the SQL database server. This involves creating a login for e-Series in iMIS and enabling encryption on both the database server and the webserver.

Enabling Encryption on the MS SQL Server

Security for e-Series sites is implemented at several levels:

1. Security settings in Windows and ColdFusion are applied to e-Series.
2. MS SQL Server provides an additional level of security through encryption, which must be enabled from both ends of the Web connection: the webserver and the MSSQL or SASA database server. The options for enabling MSSQL server are:

- Enabling Multiprotocol encryption for all connections; or
- Enabling encryption for specified clients.

Note: The instructor will complete this step in class. For a customer's site, the actual database administrator enables encryption.

To enable Multiprotocol encryption for all connections (MSSQL)

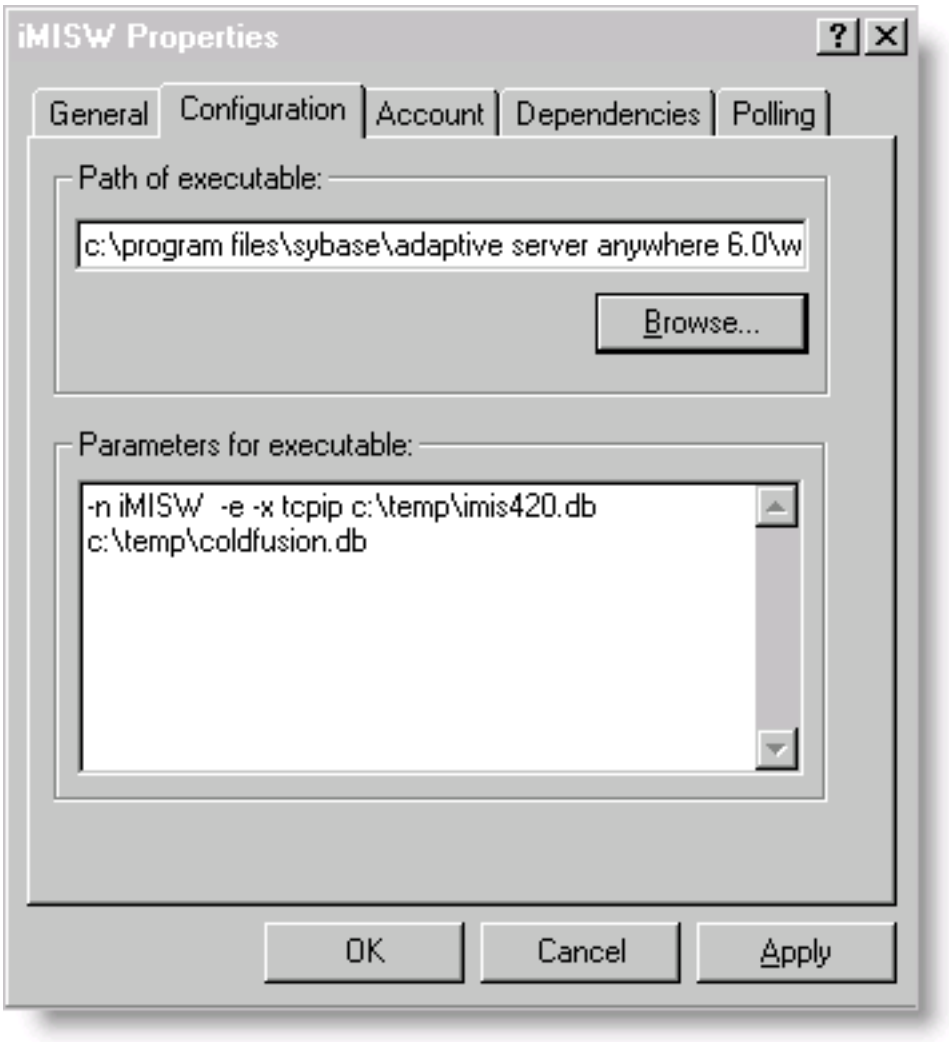
1. Configure the SQL Server to listen on Multiprotocol by adding or editing the Multiprotocol library.
2. For server-wide encryption, select the Enable Multiprotocol option.
3. Stop and restart the MSSQL Server service.
4. In the SQL Server Client Network Utility dialog box, select the General tab and then click Add.
5. Select Multiprotocol as the Network library.
6. Enter the SQL Server name in the Server alias text box.

To enable encryption for specific clients (MSSQL)

1. Configure the SQL Server to listen on Multiprotocol by adding or editing the Multiprotocol library.
2. Clear the Enable Multiprotocol option.
3. Stop and then restart the MSSQL Server service.

To enable encryption (SASA)

To encrypt all network packets transmitted to and from all clients with SASA 6.03, add the -e switch to your SASA 6.03 service. (For more information on SASA switches, see the Adaptive Server Books Online.)



iMISW Properties window

Use the -e switch on the dbsrv6 command line to encrypt packets for all clients, regardless of whether the encryption parameter is used by the client. Similarly, if the client asks for encryption, the server will encrypt.

Enabling SQL Server Client Encryption on the Webserver

We have enabled encryption on the SQL server. Now, we will turn on the SQL encryption mechanism at the webserver for the SQL server client. With encryption in place on both of the servers, any data passed between them is secure. Secure Socket Layers protects the data as it travels from the webserver through the Web back to the person initiating the request.

To enable encryption on the webserver

1. Select Start> Programs> Microsoft SQL Server 6.5 (or 7.0)> SQL Client Configuration Utility to open the SQL Server Client Configuration Utility window.
2. Click the Advanced tab.
3. Enter the following values:

Field	Value	Example
Server	SQL Server Name	CUSTNAMEA_SQL
DLL Name	Multi-Protocol	Multi-Protocol
Connection String	ncacn_ip_tcp:<ip_address> [<port>]	ncacn_ip_tcp:111.111.111.111 [1500]

Note: The IP address is the address of the remote SQL server. The port is the port assigned to multi-protocol on the remote SQL server. [1500] is the port number in the previous example.

4. Click Locate to open the ODBC SQL Server Setup window.
5. Modify the ODBC data source to use the new SQL Server entry you created using the ODBC Administrator.
6. Click OK.

Configuring SSL Security

The goal of this section is for you to gain the knowledge and skills to be able to configure SSL Security.

After completing this section, you will be able to:

- Enable encryption on MSSQL and SASA
- Enable encryption on the webserver

Overview of SSL

After you have secured the SQL database server, you need to add another layer of security, the Secure Sockets Layer (SSL).

SSL is a protocol layer placed between a reliable connection-oriented network protocol layer (TCP/IP) and an application protocol layer (HTTP). It provides for secure communication between client and server by allowing mutual authentication, encryption for privacy, and digital signatures on messages.

Suggestions for SSL Configuration and Operation

Use separate content directories for secure and public content, for example, C:\InetPub\Wwwroot\Secure-Content and C:\InetPub\Wwwroot\Public-Content.

Save your key file in a safe place in case you need it in the future. It is a good idea to store your key file on a floppy disk or tape and remove it from the local system after completing all setup steps. Do not forget the password you assigned to the key file.

Generating a Key Pair and Certificate Request

As part of the process of enabling Secure Sockets Layer (SSL) technology on your webserver, generate a certificate request and then acquire an SSL certificate. This is a simple procedure with Microsoft Internet Information services (IIS).

To generate a key pair and certificate request

1. Open Internet Information Services.
2. Right-click on the web site and select Properties.
3. Select the Directory Security tab.
4. Click Server Certificate to open the Webserver Certificate Wizard.
5. Click Next.
6. Select Create a New Certificate and click Next.
7. Enter the name for the new certificate and select the bit length.

Note: Do not select Server Gated Cryptography unless you have an SGC certificate and need the capabilities provided by SGC. Server-Gated Cryptography is an SSL extension that allows financial institutions with export versions of IIS to use strong 128-bit encryption. SGC capabilities are provided in IIS 5.0, but a special SGC certificate is required to use SGC.

8. Click Next.
9. Enter the Organization and Organizational Unit and click Next.
10. Enter the common name for the site and click Next.
11. Enter the Country/Region, State/Province, and City/Locality, and click Next.
12. Enter the filename for the certificate request, or click Browse and navigate to the directory and filename.
13. Click Next.
14. Click Next.

Acquiring a Certificate

The certificate request generated by Internet Information Services is not valid for use on the Internet until you obtain a valid certificate for it from a Certificate Authority, such as PayPal. This certificate authenticates your site to any client that accesses the server and provides the mechanisms for the client to initiate the secure session. Server-side certificates are necessary to establish an SSL-protected channel.

The process for obtaining a secure server certificate is as follows:

1. Generate a certificate request (see previous section for instructions).
2. Request a certificate by sending the certificate request file to a Certificate Authority.
3. Install the assigned certificate.
4. Activate SSL for your server.

For more information on acquiring certificates, refer to Implementing Web Site Client Authentication Using Digital IDs (http://www.verisign.com/clientauth/kit/details.html) on the VeriSign website.

Note: When processing a request for a certificate, the organization with Certificate Authority requests information including the person who applied for the e-Series domain name (the person who signed for the domain name); the address used when applying for the domain name, and the ISO 9000 official organization name. This process may take two weeks or longer to complete.

Installing a Certificate

After you complete your certificate request, you will receive a signed certificate from the Certificate Authority. Contact your Certificate Authority for complete details.

To install a certificate

1. Open Internet Information Services.
2. Right-click on the web site and select Properties.
3. Select the Directory Security tab.
4. Click Server Certificate to open the Webserver Certificate Wizard.
5. Click Next.
6. Select Process the pending request and install the certificate.
7. Enter the path and file name for the certificate, or click Browse and find the certificate.
8. Click Next.
9. Follow the wizard directions to complete the installation of the certificate.
10. Back up the certificate.

Note: If you do not specify an IP address when you install your certificate, the same certificate is applied to all virtual servers created on the system. If you are hosting multiple

sites on a single server, specify that the certificate be used only for a particular server IP address by adding the IP address.

Securing Data Transmissions with SSL

Internet Information Services provides a protocol for providing data security layered between its service protocols (HTTP and TCP/IP). This security protocol, called Secure Sockets Layer (SSL), provides data encryption, server authentication, and message integrity for a TCP/IP connection.

SSL provides a security “handshake” that is used to initiate the TCP/IP connection. The client and server agree on the level of security that will be used and that will fulfill the authentication requirements for the connection.

Thereafter, SSL's only role is to encrypt and decrypt the byte stream of the application protocol being used (for example, HTTP). This means that all of the information in the HTTP requests and responses is fully encrypted. This includes the URL requested by the client, submitted form contents (such as credit card numbers), HTTP access authorization information (user names and passwords), and all data returned from the server to the client.

An SSL-enabled server can send and receive private communication across the Internet to SSL-enabled clients (browsers). Because SSL-encrypted transmissions are slower than unencrypted transmissions, use SSL only for virtual folders that deal with highly sensitive information, such as form submissions that contain credit card information.

Configuring a Website to Require SSL

After you apply the certificate, you must enable the SSL feature from Internet Information Services. You should use Internet Information Services to configure the entire e-Series website to require SSL. You can then configure the SSL settings for specific folders and files in the e-Series system parameters.

For information on configuring e-Series system parameters, see e-Series Applications.

To configure a website to require SSL

1. Open Microsoft Internet Information Services.

2. Right-click the website and select Properties to display the website's Properties window.
3. Select the Directory Security tab.
4. In the Secure communications area, click Edit.
5. Select the Require secure channel (SSL) option.
6. Click OK.

Copying or Moving a Certificate to Another Server

After creating a certificate, you can use Internet Information Services to copy or move the certificate to another server.

To copy or move a certificate to another server

1. Open Internet Information Services.
2. Select Action> Connect.
3. Enter the name of the server where the certificate will be copied or moved and click OK. The server name appears in the list of servers (in the side index).
4. Select the certificate to move.
5. Select Edit> Copy to copy the certificate or Edit> Cut to move the certificate.
6. Select the server where the certificate will be copied or moved.
7. Select Edit> Paste.

Backing Up a Certificate and Key Pair

With Internet Information Services, you can create a certificate backup file and copy it to a floppy disk, CD, or tape for safekeeping.

To back up a certificate and key pair

1. Open Internet Information Services.
2. Locate and select the certificate.
3. Select Action> All tasks> Export to open the Certificate Manager Export Wizard.

4. Select Yes, export the private key.
5. Use the default wizard settings and enter a password for the certificate backup file when prompted.

   Note: Do not select Delete the private key if export is successful; this will disable your current certificate.
6. Complete the remaining wizard steps to export the certificate backup.

   The backup certificate file is given a .req filename extension and is saved to your hard disk. You can then copy or move the file to a floppy disk, CD, or tape.

Installing a Certificate Backup

You can install a certificate backup with Internet Information Services.

To install a certificate backup

1. Open Internet Information Services.
2. Right-click on the web site and select Properties.
3. Select the Directory Security tab.
4. Click Server Certificate to open the Webserver Certificate Wizard.
5. Click Next.
6. Select Process the pending request and install the certificate.
7. Enter the path and file name for the certificate, or click Browse and find the certificate.
8. Click Next.
9. Follow the wizard directions to complete the installation of the certificate.

Preparing to Go Live

The goal of this section is for you to gain the knowledge and skills necessary to prepare the e-Series site to go live.

After completing this section, you will be able to:

- Go live with your e-Series site with MSSQL
- Go live with your e-Series site with SASA

Completing the e-Series Implementation

The following procedures guide you through the transfer of data to the production database. You will have to create an administrative login in the production database before logging into the production site.

To create an administrative login

1. Open iMIS.

   Note: iMIS must be licensed for e-Series.

2. Enter or open a customer's record in the Manage customers window.

   Note: See Customer Management (see "Customers") for more.

3. Select the Internet Security tab in the Detail section of the Manage customers window.
4. Enter the customer's Internet Security information:

- Enter a Login.
- Enter a Password at least six characters long.
- Re-enter the password in the Verify Password field.

5. Enter an Expiration Date for the customer's login.
6. Select Administrator from the Security Group drop-down list.
7. Click Save.

To complete the e-Series implementation for MSSQL

1. Verify that all users are out of the databases.
2. Make a backup of your production and e-Series test databases.
3. Truncate the following tables in the production database:

- Cmty_Administrators
- Cmty_Discussion_Forums
- Cmty_Discussion_Posts
- Cmty_Email_Notification
- Cmty_Invitees
- Cmty_News
- Cmty_Read_Tracking
- Cmty_Shared_Files
- Cmty_Shared_Folders
- Cmty_Subscription
- Comment_Types
- Comment_Log
- Community
- Contacts
- Content_Pages
- Gen_Descriptions
- Name_Security
- Name_Security_Groups
- Security_Filters
- Security_Groups
- Security_Modes
- Security_Tables
- Style_Options

- URLs
- W_Reports

To transfer data using MSSQL Data Transfer Service (DTS)

1. Run MSSQL Data Transfer Service (in Enterprise Manager, Tools> Data Transformation Service)
2. Transfer the data from tables in the test database to the same tables in the production database, as follows:

- Gen_Descriptions
- Security_Filters
- Security_Groups
- Security_Modes
- Security_Tables
- Style_Options

To implement e-Communities on the production site

If you are implementing e-Communities, your best option is to create your communities and content on the production site, rather than transferring the setup from the test database.

When you create the communities on the production site, you should not copy any files in the /StaticContent/CmtyStorage directory from the test site to the production site. These folders will be created when you create the communities on the production site.

To transfer e-Communities with extensive content

Use the following guidelines for transferring e-Communities setup data only if extensive e-Communities content has been set up on the test site, and it would not be feasible to re-create the communities.

1. Copy all folders from the /StaticContent/CmtyStorage directory on the test site into the production site directory on the webserver.
2. Transfer the Community table from the test database.
3. Review the data in the following tables, noting any ID numbers referenced in the data.

   Note: Make sure that the ID numbers in this data correspond with the appropriate Name records in the production database. You can use a SELECT DISTINCT ID FROM… query to find the IDs referenced in each table.
4. Transfer these tables.

- Cmty_Administrators
- Cmty_Discussion_Forums
- Cmty_Discussion_Posts
- Cmty_Email_Notification
- Cmty_Inviteees
- Cmty_News
- Cmty_Read_Tracking
- Cmty_Shared_Files
- Cmty_Shared_Folders
- Cmty_Subscription

Note: If the ID numbers correspond with different records, some data cleanup will be necessary following the transfers.

5. Update the ID numbers in the tables as necessary.

To transfer optional e-Series tables

1. Transfer these tables which are used for optionale-Series applications.

- Contacts
- Content_Pages
- Mail_Lists
- Urls
- W_Reports

2. Carefully review any tables that include ID numbers. ID numbers that are different in the production database must be updated following the transfer.

   Note: Make sure the ID numbers correspond with the proper Name records in the production database.

   To transfer the login and password data

   If new records were added to the test database during the e-Series configuration, these ID numbers will likely overlap the ID numbers of new records added to the production database during that same time period.

- The Generate Login utility can be used to populate these tables in the production database.

  If you choose to transfer the data, transfer these tables from the test to the production database and review the ID numbers:

- Name_Security
- Name_Security_Groups

  To update the Counter table in the production database

  Since data has been imported into the production database, the Counter table must be updated so that the LAST_VALUE field for e-Series-related tables is updated according to the data now present in those tables.

1. Log into iMIS as an administrator.

2. Navigate to Utilities > Table Analysis.
3. Click Build Counter.

To point the ODBC connection to the production database

1. Change the ODBC data source (on the webserver) so that it points to the production database.

Alternatively,

- Create a new ODBC data source for the production database.
- Set up the new ODBC data source with a password in ColdFusion Administrator.
- Re-run the Application Wizard (AppWiz) to make sure that the e-Series site is pointing to the correct ODBC data source.

Note: Do not select the Create Default Content option.

2. Verify that the ODBC data source used by any Crystal reports is set to the production database, and not the test database.

Note: If you experience a slowdown in the reporting process on your SQL server, consider implementing a “reporting server” to alleviate any loading of your production database.

To create the e-Series security triggers

To create the e-Series security triggers, you must run the Update_Security_Cursors script in the production database.

1. Log into iMIS as an administrator.
2. Navigate to Utilities > Table Analysis.
3. Click the Make Triggers button.
4. From a SQL query tool, run the Update_Security_Cursors script.

To set the e-Series System Parameters

The System_Params table includes parameters for both iMIS and e-Series. It is not advisable to truncate this table in the production database. e-Series System Parameters must be set in the production database.

1. Re-enter the e-Series system parameters manually (Admin > Lookups > System Parameters) once the production site is set up.
2. Save screenshots of the system parameter settings while the test site is still accessible if the test site will be made inaccessible.

   Note: System parameter settings can also be found in the System_Params table of the test database. It is more efficient to view the information in screenshots rather than locating specific rows in the System_Params table.
3. Log into the production site as an administrator and update the system variables (Admin> Lookups> Update System Variables).

   To complete the e-Series implementation for SASA

   The e-Series implementation for SASA is the same process as implementation for MSSQL with two exceptions.

   Exception 1

   Instead of using MSSQL DTS to transfer data, you must unload the tables from the test database (into a text file) and load the data into the production database.

1. To unload a table from the test database, run the following SQL script against the test database for each table you need to transfer:

   unload table [table_name] to'[path]\\[file_name].txt'

   For example:

   unload table gen_descriptions to C:\\eseries\\transfer\\gen_desc.txt'

   Note: The text files names provided are examples. Paths are relative to the server, but the scripts can be run from any workstation via iSQL.

2. To load a table into the production database, run the following SQL script against the production database for each table you need to load:

   load table [table_name] from '[path]\\[file_name].txt'

   For example:

   load table gen_descriptions from 'C:\\eseries\\transfer\\gen_desc.txt'

   Exception 2

   Instead of using the Update_Security _Cursors script, use Sybase iSQL to run the Security_Triggers_Sybase.sql and Update_Security_Cursors_Sybase.sql scripts on the production database.

Troubleshooting e-Series implementation

Installation Troubleshooting Tips

All e-Series site administrators should administer their site with the latest version of the Internet Explorer browser.

Custom tags

1. Copy the entire contents of the custom tags folder \eSeries\Source\CustomTags into the \CFUSION\CustomTags directory.

Wizards

1. Run the Application wizard.

- If this is a new installation, enable (click Yes) the Create Default Document and Create Default Content options.
- If this is an upgrade, disable (click No) the Create Default Document and Create Default Content options. If you click Yes for an upgrade, you lose any customizations you have made.

2. Specify which scripts in the Script wizard to run against your database.

- If this is a new installation of e-Series with a new iMIS database, execute every single script against the database.

- If this is a new installation of e-Series with an existing iMIS database, run scripts only as appropriate. For example, for the script that inserts Member Types, insert only the “WEB” Member Type.

  Tip: You do not have to run the following scripts on an existing iMIS database: States_ Countries, Name_Address_Insert, Name_Security.

Common Error Messages

CFINCLUDE Error

If you use relative paths (for example, TEMPLATE=“index.cfm” or TEMPLATE-E=“\index.cfm”), you do not have to create any special mappings. We recommend that you use relative paths with CFINCLUDE whenever possible.

This particular CFINCLUDE looping error message does not give a clear diagnosis of the problem and actually is masking the real error message. You should refresh the error-request.cfm file:

1. Take the original e-Series source code zip file and extract the files again into a new folder.
2. Navigate to Customer\ScriptContent.
3. Copy the errorrequest.cfm file and paste it into your working e-Series folder's ScriptContent sub-folder.
4. Return to your website. Now you can see a better error message with an explanation of the real issue.

Access Denied

If you get the “Access Denied” error message, right-click on the webpage and select View Source. A second window pops up. Scroll to the bottom of that window. e-Series tells you which security filter must be enabled in order to have access to that area of the website.

HTTP 404 Object Not Found

This error occurs when there is an incorrect mapping. There are several things to check when you get the HTTP/1.0 404 Object Not Found error message:

1. Verify that the path to your website is correct in ColdFusion. Open the ColdFusion Administrator and go to Mappings. Check your logical path and IP address. If this is a virtual site, the logical path should be the IP address/name of the virtual site.
2. Open the default.htm file. Verify that all paths to the website are correct in this file.

   Note: There are other problems that may cause 404 errors.

Report Not Completed Error while Running Crystal Reports

Several sources including ActiveX Viewer, proxy servers, or NT security, could cause this error message. For more information see the Crystal Decisions (http://support.crystaldecisions.net/communitycs/technicalpapers/scr8_activexviewerissues.pdf) (formerly Seagate Software) website posting to help troubleshoot this issue. To access this technical paper, you may need your Crystal Reports Software Registration number.

Transaction Error Message during Checkout Process

For a PayPal gateway, a transaction error will be generated if any errors in the CheckOut Process occur that are outside the credit card gateway. If the gateway is enabled and a transaction error occurs the credit card information will have already been sent to the gateway.

Error message when editing a profile online

Sometimes Name.LAST_UPDATED is left unpopulated during a conversion. In this case, a customer/member encounters an error when trying to edit their profile online, “The update has failed, please try again!” You must populate the records where Name.LAST_UPDATED is null.

Error committing data from user defined windows

If a user defined window contains fields that access the same table in the iMIS database, only the data in the last user defined field is committed.

Error Executing Database Query. [Macromedia][SQLServer JDBC Driver][SQLServer-]Cannot convert a char value to money. The char value has incorrect syntax.

Password verification in e-Series

The password used in e-Series must be six characters in length and must contain at least one numeric and one alpha character. If you try to create a password that has single

quotes, double quotes, pound signs, or spaces, you will receive an error message.

An application variable, Application.PasswordValidationMessage, is located in the _eSeriesConfig.txt. This variable can be used to customize the password validation message.

QSI gateway connection not verified in e-Series

The QSI gateway cannot be successfully verified through e-Series. You must use the Dialect Payment Client Test on the server to test the QSI gateway connection. Only the gateway for Verisign/PayPal can be verified through e-Series.

When attempting to verify the QSI gateway connection iMIS displays the following message:

The credit card gateway has been configured but cannot be verified through e-Series. To verify the connection, you must use the Dialect Payment Client Test on the server.

Common Issues

See Customizing Confirmation emails for help with testing and troubleshooting those customizations.

Verifying the Gateway Connection

You can test and verify the connection between your e-Series site and the Verisign gateway to ensure credit card transactions process successfully. To verify this connection, select Verify gateway connection on the Credit Card Authorization Options window (from Admin, select Lookups> Credit Card Gateway).When you select Verify gateway connection, a message displays indicating if the connection was verified successfully or was not verified.

Note: If the credit card gateway is Disabled on the Credit Card Authorization Options page, the Verify gateway connection link will not display. The Enabled option must be enabled for the Verify gateway connection link to display.

Webmaster email Notification

When credit card transactions do not process successfully, webmaster notification will be sent by email when a customer is making a purchase and the gateway is unavailable. Logic has been added to the CCValidation.txt file that tests the connection before starting

an online transaction. If the connection fails, an email message is sent to your site's web-master.

The interval between email messages sent to the webmaster can be set in minutes when the gateway is unavailable and customers are trying to make purchases. The interval between email messages that are sent to the webmaster when the credit card gateway is unavailable for customers attempting to make purchases can be set in the Unresponsive gateway message interval field on the Credit Card Authorization Options window (from Admin, select Lookups> Credit Card Gateway).

When a change is made on the web, an email message is sent to the site administrator. This email contains a reference to a hyperlink, such as

http://www.txca.org/Source/Lookups/Memberlog.cfm?ID=13809

The site administrator must be logged on before clicking the hyperlink; otherwise an error is displayed on the referenced website.

Note: If the credit card gateway is Disabled on the Credit Card Authorization Options page, the Unresponsive gateway message interval field will not display. The Enabled option must be enabled for the Unresponsive gateway message interval field to display.

Disabling Online Purchases

You can temporarily disable online purchases if needed (for example, if the credit card authorization gateway is temporarily unavailable). To disable or enable online purchases, toggle the Disable online purchases/Enable online purchases link on the Credit Card Authorization Options window.

Note: If the credit card gateway is Disabled on the Credit Card Authorization Options page, the Disable online purchases/Enable online purchases link will not display. The Enabled option must be enabled for the Disable online purchases/Enable online pur-chases link to display.

Anonymous Users and Security Filters

Security filters do not adapt easily to anonymous user access. The problem is that when a security filter is evaluated, the filter is thrown into a query that includes Name.ID-

='#Client.ID#.' Since anonymous users do not have a Client.ID, the query will never return any rows.

A variable is created from the PreserveSingleQuotes (Variables.Filter) function that sets the AND criteria for search results, allowing search results to be returned for anonymous users.

If you want to allow anonymous users to search your site's Directory, only the Browse - Member filter should have a filter query; the Search - Member filter should not have a filter query.

For example, anonymous users will not be able to search your site's Directory if filter queries are defined for the following filters:

- Browse - Member: Name.MEMBER_TYPE='CM'
- Search - Member: Name.MEMBER_TYPE='CM'

The Search - Member filter is for page level security. If the Search - Member filter is enabled, anonymous users will not be able to access the search fields.

The Browse-Member filter is for record level security, and only the Browse - Member filter should have a filter query if you want anonymous users to have access.

Correcting Corrupt UserDefined Table Data

e-Series inserts Expansion codes into the database if Expansion codes have been defined in the general lookup/validation tables for user-defined tables (from Customers, select Set up tables > General lookup/validation). User-defined tables are accessible in e-Series by clicking more info on a customer's profile page.

iMIS will correct a customer's user-defined table data the first time the customer's record is edited in Customer Portfolio.

The following rules govern which code e-Series inserts into the database when inserting customer data in user-defined tables:

- If only the Code and Description fields are defined for a general lookup/validation table created for a user-defined table, then the Code is inserted into the database.

- If the Code, Description, and Expansion fields are defined for a general lookup/validation table created for a user-defined table, then the Expansion code is inserted into the database.

  Note: User-defined table fields of the type Money cannot exceed 22 characters in length. For larger numbers, use the Number type for user-defined table fields.

  Special characters

- Do not put special characters or spaces in meeting codes, function codes, product codes, activity types, pay types, and custom tables and windows. For example, hyphens are not allowed.
- The only special character that is allowed in custom tables and windows is the underscore. For example, using the naming convention "_eSeries" is acceptable.

  Modification of Unencrypted Files

  Below is a list of unencrypted files under the Source directory. These files control the characteristics of e-Series pages. For files that refer to tables, TableStandard_0.txt, TableStandard_0.txt, and TableStandard_0.txt the default pixels settings is 100%.

- Source/Body.txt - (All pages) Any parameter for the body tag can be added.
- Source/IncorrectPassword.txt - Displayed in the login page upon failed login.
- Source/Member-Logoff.txt - Text displayed when the logout link is used on a no-frames site.
- Source/Site-Logon.txt - Text displayed on the logon screen if jumping directly to a page before logging on.
- Source/TableButtons.txt - (All pages) Change or add parameters to the table that holds the buttons.
- Source/TableStandard_0.txt - (All pages) Controls the table width for the first table on the checkout basket page.
- Source/TableStandard_1.txt - (All pages) Change or add parameters to the tables that format the display of forms and retuned data.

- Source/TableStandard_2.txt - (All pages) Change or add parameters to the tables that format the display of forms and retuned data if it is in a child table.
- Meetings/CCValidation.txt - Access to CC_Validate and CT_ custom tags. Additional error handling or parameters can be added for the credit card gateway tag.
- Meetings/QuantityAdjustment.txt - Message displayed when in the check-out page if a function quantity is adjust.
- Meetings/NoFunctionsForMeeting.txt - Displayed in the meeting pages if no functions are available for the meeting.
- Meetings/NotRegistered.txt - Displays in the checkout basket page if you have not register for any meeting functions.
- Meetings/AllowRegSelect.txt - JavaScript pop-up message if meeting registration fails.
- Meetings/regclass.txt

Changing the Contents of Default Home Pages for a Frameless Site

Modify these files that are located in the Customer/StaticContent/StaticPages directory:

- eSeriesHome.htm
- eCustomerHome.htm
- eEventsHome.htm
- eOrdersHome.htm
- AdminHome.htm

Any valid HTML, ColdFusion, or JavaScript can be used in the home page files.

Useful Local Variables Available upon Login

The following variables are available when a customer has logged in:

- Client.ID
- Client.CHAPTER
- Client.CO_ID

- Client.COMPANY
- Client.IP_ADDRESS
- Client.MAJOR_KEY
- Client.MEMBER_TYPE
- Client.ORG_CODE
- Client.REGISTRANT_CLASS
- Client.SECURITY_GROUP
- Client.TITLE
- Client.FULL_NAME
- Client.FIRST_NAME,
- Client.FULL_ADDRESS
- Client.LAST_NAME
- Client.CITY
- Client.STATE_PROVINCE
- Client.ZIP
- Client.COUNTRY
- Client.TAX_EXEMPT
- Client.EMAIL

NT/IIS Security

For more information on NT/IIS security, see

http://www.macromedia.com/devnet/security (http://www.macromedia.com/devnet/security)

Third address line in outgoing email

Caution! When you enable third address line in iMIS for the first time, any customization you have previously done to the email that notifies customers of record edits will be lost.

ColdFusion Issues

Testing your ColdFusion installation

Before you begin installing e-Series, you should perform a quick and simple test of your ColdFusion server installation.

Registry

e-Series uses ColdFusion application and session variables. By default, ColdFusion stores client variables to the System Registry for a period of 90 days. Storing application and session variables in the Registry may cause the Registry to fill up, which could stop any ColdFusion applications and could seriously affect the performance of the Windows Server.

ASI recommends that all variables be stored to a table on a SQL server or Access database using ODBC.

Mappings

Verify that your mappings in ColdFusion are correct.

If you are using virtual directories for several customers, add the customer name after the IP address when entering the logical path.

Mail

The Mail Server field must be populated in e-Series. The Mail Server field is located in ColdFusion in the side index under Miscellaneous> Mail.

If the field is not populated, iMIS returns an error message stating No SMTP Server Specified for CFMAIL when customers try to register for a meeting or edit their records.

Note: The mail server address does not have to be a valid address until the e-Series site is public.

Configuring an Exchange Server to relay mail for a ColdFusion Server

1. Select the Internet Mail Connector in Microsoft Exchange Administrator.

2. Click on the Routing tab, and then enable the Reroute incoming SMTP mail option that is required for POP2/IMAP4 support.
3. Click Add, and then enter all the available domains that your Exchange server recognizes. For example, if you receive mail for csiinc.com and csisupport.com, enter both of these domains.
4. Click on the Routing Restrictions tab.
5. Enable the Hosts and clients that successfully authenticate and Hosts and clients with these IP addresses options.
6. Enter the public IP address of your ColdFusion Server in the IP Address and Mask fields.
7. (optional) If you are using NAT, enter the internal IP address provided if both the Exchange Server and ColdFusion server are on the same side of the firewall.
8. (optional) If you want to allow a single IP address, enter the Mask as 255.255.255.255.
9. (optional) If you want to allow a full c-class range of IP addresses, enter the IP address ending in a zero (for example, 192.168.1.0) and a Mask of 255.255.255.0.
10. Restart your Internet Mail Connector.

Securing the ColdFusion Service for Windows 2000 Server

The first step is to control access to the ColdFusion service by creating a new user account for ColdFusion in Windows 2000, and configuring the security settings.

Note: The steps to control access to the ColdFusion service may appear excessive to some administrators, and are optional security measures.

ColdFusion recommends that the ColdFusion service account should not log in as the system account; therefore, use the Windows 2000 Computer Management window to configure security.

To add a ColdFusion user (Windows 2000)

1. Select Start> Settings> Control Panel> Administrative Tools> Computer Management.

2. On the Computer Management window, select System Tools> Local Users and Groups> Users.
3. Right-click on Users to open the New User window.

- Enter CF_Manager for the User name.
- Enter ColdFusion Manager for the Full Name.
- Enter a Password, and confirm the password by reentering it in the Confirm Password field.
- Enable the User cannot change password option.
- Enable the Password never expires option.
- Click Create on the New User window.

4. On the Computer Management window, select System Tools> Local Users and Groups> Groups.
5. Right-click on Users to open the Users Properties window.
6. Select CF_Manager in the Members area of the window, click Remove and then click Apply.
7. Select Programs> Administrative Tools> Local Security Policy to open the Local Security Settings window.
8. Select Security Settings> Local Policies> User Rights Assignment.

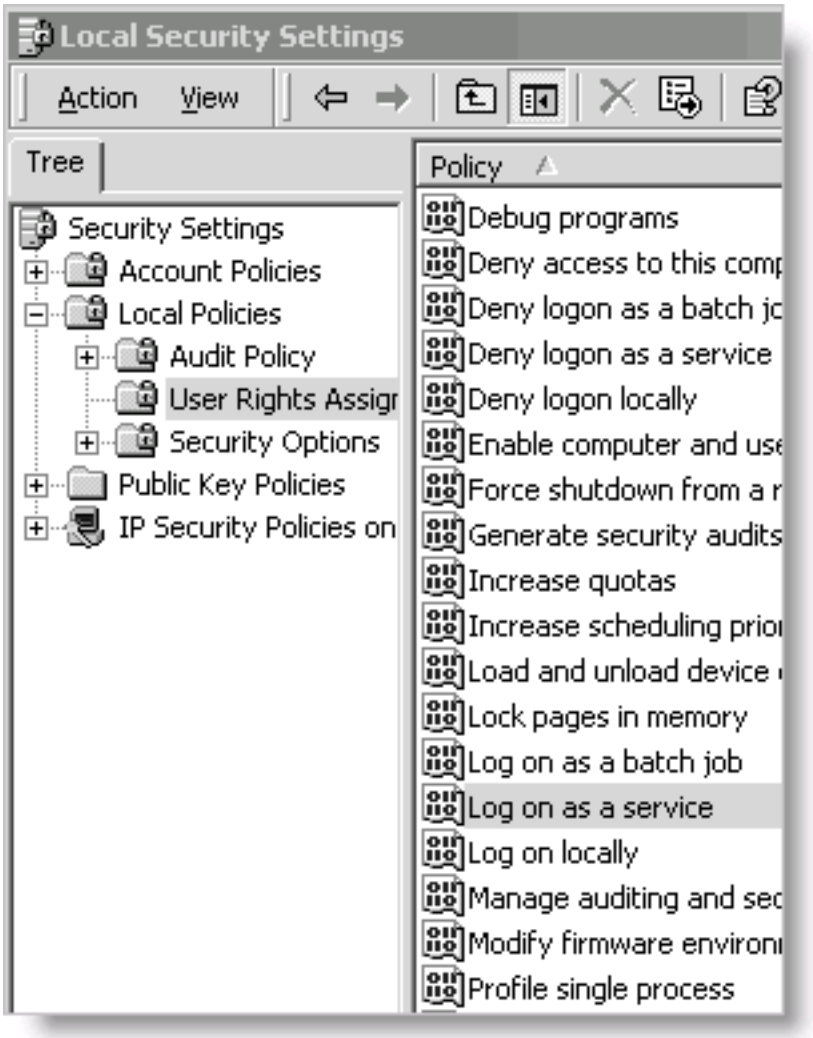
- From the available policies, double-click on Log on locally to open the Local Security Policy Setting window.
- Select CF_Manager from the scroll-down list.

9. Click Add on the Local Security Policy Setting window to open the Select Users and Groups window.

- Select CF_Manager from the scroll-down list.
- Click Add on the Select Users and Groups window.

- Click OK twice.

10. On the Local Security Settings window, double-click on Log on as a service to go to the Local Security Policy Setting window.
11. Select CF_Manager from the scroll-down list.
12. Click Add on the Local Security Policy Setting window.
13. Select CF_Manager from the scroll-down list.
14. Click Add on the Select Users and Groups window.
15. Click OK.



Local Security Settings window

To set directory permissions for CF_Manager (Windows 2000)

In the following procedure, you will set directory permissions for CF_Manager in the ColdFusion, InetPub, and eSeries directories.

1. Using Windows 2000 Explorer, navigate to the Cfusion directory.
2. Right-click the Cfusion directory and select Properties. The CFusion Properties window opens.

- Click the Security tab, and select ColdFusion Customer.

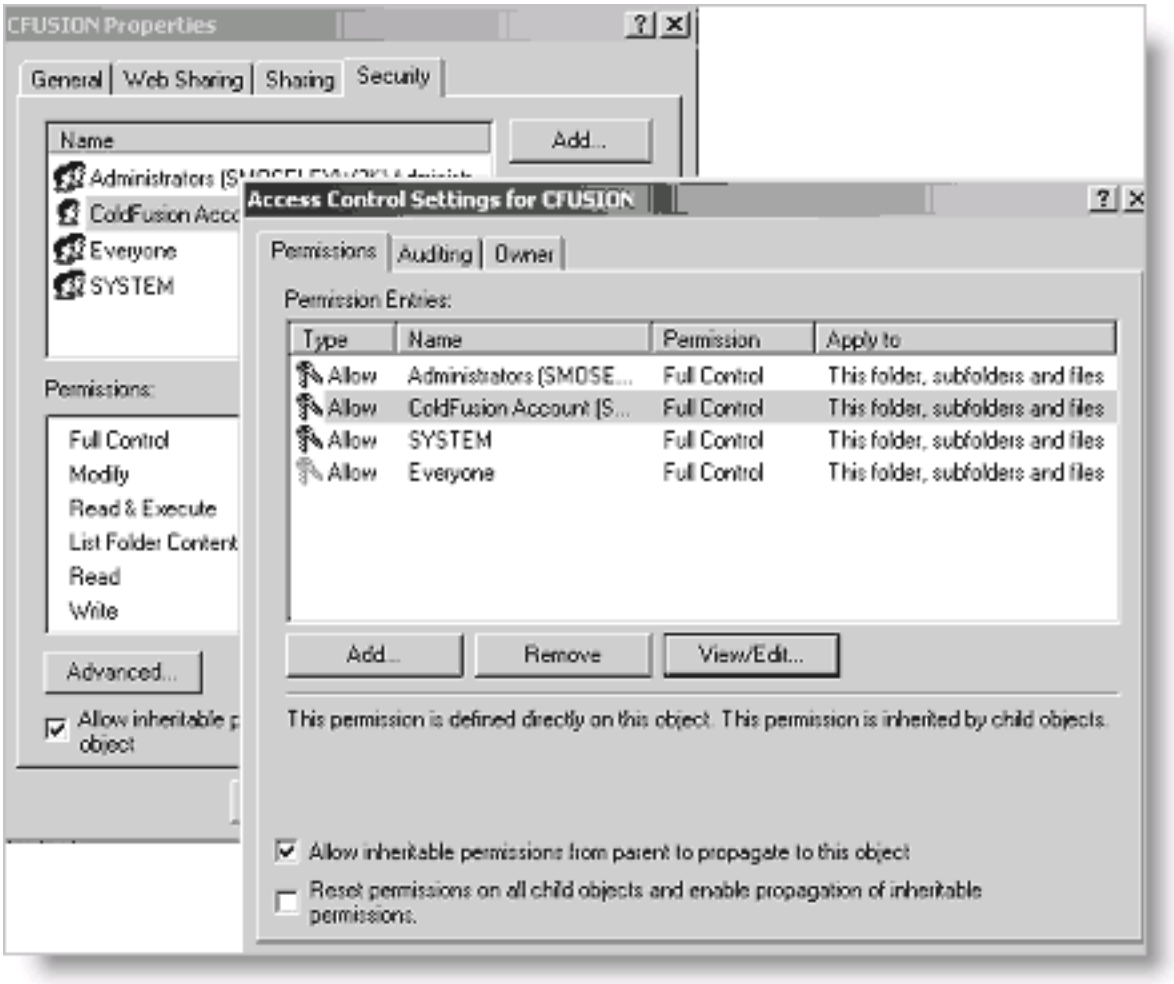
  If CF_Manager does not display, click Add and select CF_Manager from the Select Users or Groups window. You may need to change the selection in the Look-in drop-down list to the local computer's account.

  Note: If the Security tab does not appear on the CFusion Properties window, you will need to enter C:/fs:ntfs in the Run window (Start> Run), and then reboot your computer.

- Click Add,
- Click OK.

3. Under Permissions, select the Full Control, Modify, Read & Execute, List Folder Contents, Read and Write options.
4. Select the Allow inheritable permissions from parent to propagate to this object option.
5. Click Apply.
6. On the CFUSION Properties window, click Advanced to open the Access Control Settings for CFUSION window.
7. Verify that the ColdFusion account has the Full Control and This folder, subfolders and files options set.
8. Click OK on the CFUSION Properties window.
9. Repeat the previous steps for the following directories:

- C:\InetPub
- C:\eSeries



Set Access Control Settings

To grant CF_Manager limited access to the Registry (Windows 2000)

1. Select Start> Run to open the Run window.
2. Enter regedt32 (the Windows 2000 Registry Editor program).
3. Click OK to open the Registry Editor.
4. Using regedt32, navigate to the following registry key: HKEY_LOCAL_MACHINE> SOFTWARE> Macromedia.

5. Select the Macromedia folder, and then select Security> Permissions to open the Permissions for Macromedia window.
6. Click Add to open the Select Users or Groups window.
7. Select CF_Manager from the list of users.
8. Click Add, and return to the Registry Key Permissions window. CF_Manager now displays in the window.
9. Click OK.
10. Enable the Replace Permissions on Existing Subkeys option.
11. Select CF_Manager (ColdFusion Account) from the list of users.
12. Enable the Read and Full Control options.
13. Enable the Allow inheritable permissions from parent to propagate to this object option.
14. Click Apply.
15. Repeat the steps to apply Full Control rights to e-Communities.

    Note: The key for e-Communities is Software> Advanced Solutions International> iMIS e-Series. Since the registry is being updated every time the CF Scheduler runs to send out emails, the CF_Manager needs to have Full Rights added to the IMIS eSeries registry key similar to the settings for ODBC and INETPUB. E-mails will not be sent unless CF_Manager has appropriate permissions.
16. (optional) If Advanced ColdFusion Security is installed, repeat the steps to add Full Control rights for CF_Manager to HKEY_LOCAL_MACHINE/SOFTWARE/NETEGRITY.
17. To grant CF_Manager access to the OBDC, repeat the steps to add Full Control rights for CF_Manager to HKEY_LOCAL_MACHINE/SOFTWARE/ODBC.

    To start or stop the ColdFusion services (Windows 2000)

    Next, you need to start the ColdFusion services, then stop and restart the services.

1. Select Start> Settings> Control Panel> Administrative Tools> Services to open the Services window.
2. Right-click on ColdFusion Application Server to open the ColdFusion Application Server Properties (Local Computer) window.
3. Select the Log On tab and enable the This account option.
4. Browse to CF_Manager to verify that the correct domain is entered.
5. Enter your password in the Password field and reenter the password in the Confirm Password field.
6. Click OK to return to the Service window.
7. Right-click on ColdFusion Application Server to open the ColdFusion Application Server Properties window.
8. Select the Hardware Profile, and click Enable.
9. Repeat the steps for ColdFusion Executive and ColdFusion RDS.

Setting up CF_Manager with ColdFusion Advanced Security

If you install Advanced Security with ColdFusion and are running the ColdFusion services under the CF_Manager account, you have to add additional registry rights to the that account to be able to start the ColdFusion Application and RDS Services. You will need to grant Full Control to CF_Manager for the HKEY_LOCAL_MACHINE>> SOFTWARE>> Netegrity keys and all subkeys.

Enabling ColdFusion debugging for e-Series

When trying to determine e-Series and installation problems, you can benefit from the debugging features of ColdFusion. Enabling these settings allows you to determine the SQL query, data source name, and which .cfm files are being used by e-Series.

1. In ColdFusion, select Miscellaneous> Debugging in the side index.
2. If desired, specify the users who will also see this information.

Forgot your ColdFusion Administrator password?

The password is stored in the systems registry. To turn off the password, set UseAdminPassword to 0. If you are running ColdFusion 4.5 or a later version, you will need to restart your application for this change to be detected.

Referring IP Address Error Message

Errors messages from the ColdFusion server list a referring IP address. This IP address should be the IP of the client workstation, not the IP address of the ColdFusion server.

Assistance from Technical Support

FTP Access to Webserver

In order to debug a problem with your e-Series website, Advanced Solutions Technical Support may need FTP access to the webserver where the e-Series source code is installed.

You can set up an FTP site in IIS. FTP site setup is similar to website setup.

1. Open IIS on the webserver.
2. Right-click on the website and select New> FTP site.
3. Enter the IP address and the required properties.

Access to the iMIS database

To be able to debug a problem with your e-Series website, Advanced Solutions Technical Support may need to access to your database. The iMIS database can be accessed with PC Anywhere, RAS access, or over the Internet.

Sending screenshots to Support

If the e-Series website is behind a firewall and cannot be viewed by Advanced Solutions Technical Support, you must send screenshots of all error messages. The preferred method for sending screenshots is to paste the screenshot into Microsoft Word and email the Word document as an attachment.

Debugging in ColdFusion

To debug a problem with your e-Series website, you may need to turn on ColdFusion debugging. Turn on debugging before you call Technical Support so they can go to the website and gather all the necessary information.

e-Series Applications

Introduction

This guide teaches you how to set up and use iMIS e-Series™. It walks you through the most important tasks in setting up your site and defining the parameters for iMIS e-Customer Management™, iMIS e-Billing™, iMIS e-Events™, iMIS e-Orders™, and iMIS e-Communities™.

Upon completion, you will be able to do the following:

- Administer, set up, and use the iMIS e-Series modules
- Configure security
- Customize your e-Series site

Terms for e-Series applications

Some explanations in this document may vary depending on the database used with iMIS. In these situations, the following nomenclature is used to identify the database:

- Microsoft SQL Server®: (MSSQL)
- Sybase Adaptive Server Anywhere™: (SASA)

Browser

Browsers request pages from webservers, process HTML and client-side scripting (such as JavaScript and VBScript), and display pages.

Dynamic webpage

Dynamic webpages are interactive and allow the user to display custom information. Usually, the information is queried from a database and then displayed on the page. Dynamic page processing includes the following steps:

1. The user requests the page by entering a URL in a browser.

2. The browser requests the page from the webserver.
3. If the requested page has a .cfm extension, the webserver sends the page to the ColdFusion Application Server for processing.
4. The ColdFusion server processes the ColdFusion tags and outputs the data in HTML.
5. The webserver sends the resulting HTML page to the browser.
6. The browser interprets the HTML and displays the page to the user.

HTML

(Hypertext Markup Language) HTML is the markup language used to format documents on the World Wide Web.

HTTP

(Hypertext Transfer Protocol) HTTP is the client/server protocol used to access information on the World Wide Web.

Static webpage

Static webpages are pages that do not change and have little interactivity except hyperlinks. The information on a static page changes only when an HTML developer updates it. Browsers and webservers process static pages by following these steps:

1. The user requests the page by entering a URL in a browser.
2. The browser requests the page from the webserver.
3. The webserver sends the page to the browser in HTML.
4. The browser interprets the HTML and displays the page to the user.

e-Series Overview

The iMIS e-Series products give you the ability to provide online functions and e-commerce for your customers so that they can enter customer information, make dues payments, purchase products over the Web, and join communities.

e-Series includes the following modules:

- e-Customer Management
- e-Billing
- e-Events
- e-Orders
- e-Communities

You must purchase e-Customer Management to use the e-Events and e-Orders modules. To use e-Events, you must purchase the iMIS e-Event Management module so that your customers can register for events and event functions online. To use e-Orders, you must purchase the iMIS Orders module so that your customers can place orders online.

e-Series Features

e-Series allows organizations running iMIS to access the member database through the Internet. Customers, traveling staff, and staff at remote offices can enter customer information, register for events, purchase products over the Web, and join communities.

The e-Series features include the following:

- Real-time processing - Because your Web pages integrate with the iMIS database, transactions are processed as they happen
- Microsoft SQL Server (MSSQL) or Sybase Adaptive Server Anywhere (SASA) database support
- Customizable interface and modules
- PayPal support to validate and authorize credit card payments
- Configurable security levels - Create up to 99 security groups including the default logins for Administrator, Web Administrator, Remote Chapter, and Anonymous
- Comments - Receive customer input and store email messages in a database with unlimited comment types
- Integration with the iMIS Orders module

- Value Added Tax (VAT) and Canadian taxation integration
- e-Customer Management functions:
- International date formatting
- Customer sign up
- Enable anonymous user sign up
- Customer search/query screens
- Customer data maintenance
- Security on almost every field allowing limited filtered access
- Security on custom windows
- e-Billing functions:
- Credit card payment verification
- View outstanding balances
- Make online payments
- e-Events functions:
- Event search capability
- Registration options
- E-mail registration
- View only
- Online registration
- View/confirm event registration
- Conflict checking for event functions
- View rosters
- View order detail of registration

- Function links for more information
- e-Orders Functions:
- Define credit card accounts
- Set up batch control
- Define tax codes
- Define Web order types
- Enable products and product categories for the Web
- View products on the Web
- Purchase products on the Web
- e-Communities Functions:
- Create and manage communities
- Create and manage email lists
- Create and manage community news items
- Archive community news items
- Create and manage community discussion forums
- Participate in discussion forums
- Create and manage community documents
- Subscribe to communities
- Set email preferences
- Mark items as read
- Search communities
- Verity Indexing set up and maintenance

Using e-Customer Management

Overview of e-Customer Management

e-Customer Management connects directly to the iMIS customer database to provide online access and functionality. Customer information submitted through e-Customer Management is accessible instantly in the iMIS system.

e-Customer Management provides you with many powerful features that allow you to perform the following actions:

- Search and view the directory, export selected records, and email customers returned by a search
- Sign up and edit customer records
- View, modify, and insert customer activity records

The goal of this section is to give you the knowledge and skills necessary to use the e-Customer Management module.

After completing this section, you will be able to perform the following functions:

- Using Directories
- Using the Search Utility
- Using the Speed Search Utility
- Signing Up a New Customer
- Editing Logins and Passwords in e-Series
- Resetting User Passwords
- Logging In as Another User
- Editing Records in e-Series
- Viewing Customer Activity Records
- Viewing Additional Customer Information

- Recording Relationships
- Entering Notes

Using Directories

The Directory feature of e-Customer Management allows you to find an individual or company name quickly. Do not use this feature for large databases because of the time required to return results. As an alternative, you can use the Speed Search utility.

Note: Make sure that field names and activity type names do not contain spaces. If they do, you will receive a ColdFusion error if you conduct a search and any of these fields contain spaces.

To view the director

Note: You can change the list sort order by clicking the column headers.

1. Log in to the e-Series website.
2. Select Directory in the top navigation bar to display the Directory Search utility.
3. Select the letter that matches the first letter of the customer's last name or the first letter of the company name to display the Search Results page.

To export selected records

After you conduct a directory search, you can export selected fields from the returned records to a .csv file that you then can download.

1. On the Search Results page, click export to display the Export page.
2. Select the Address Type to export.
3. In the Fields to Export list, press Ctrl and select each field you want to export.
4. Click submit to view the Export Results page.
5. Click the report hyperlink to open or download the spreadsheet and view the export as shown in the following example.

Note: You must have Microsoft Excel loaded on your computer for the file to display in an Excel spreadsheet. Excel limits the name of the workbook to 32 characters, so if your search query results in a long name, you may see an error that Excel cannot resolve the workbook name. The data is still exported though.

Export Custom Windows

The export utility includes the Custom Windows (or User Defined Fields). The Export function has an option to select a custom window and select various fields of the table to export a file. Refer to Customizing e-Series Scripts.

Using the Search Utility

e-Series includes a powerful search utility that allows you to conduct searches on the following:

- Standard fields such as ID, Last_Name, Company, Chapter, State, and Zip
- User-defined fields
- Any combination of standard fields and user-defined fields
- Security groups

The search fields that display in the Advanced Search page are determined by the configuration of the customer's security group, and you can limit the number of fields that display for each security group. The MEMBER - Search security filter restricts search results at the query level. The MEMBER - Browse security filter restricts search results at the browse level; users are restricted from seeing a record.

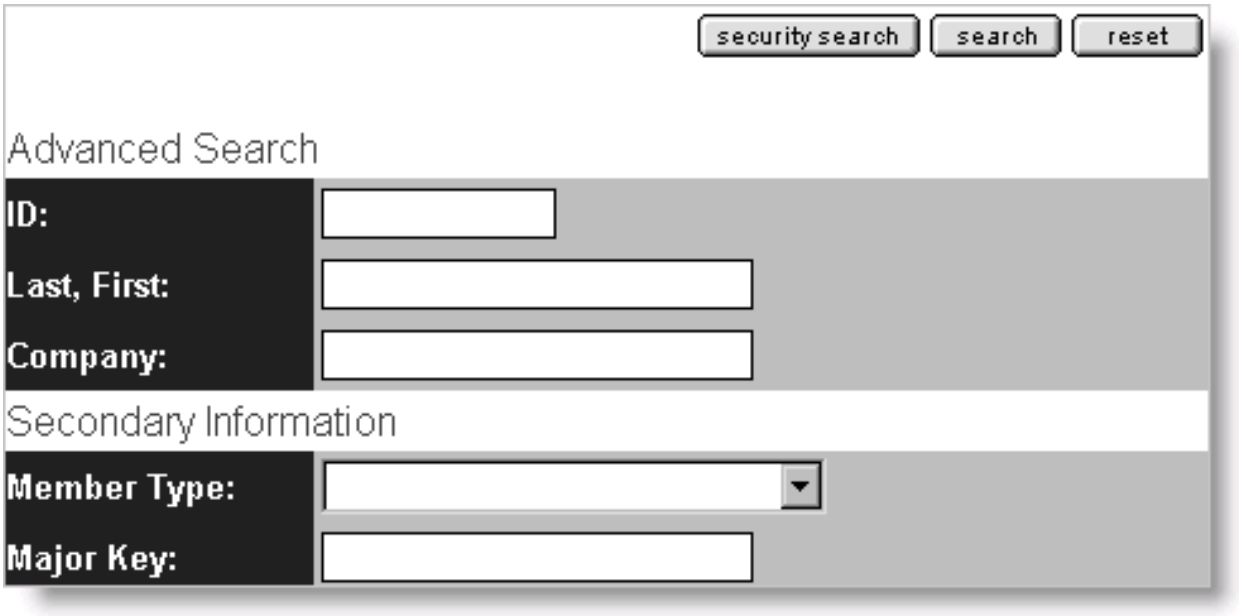
Depending on the user's security group, users can perform several functions after a search:

- View and edit customer records
- Send email messages
- Export records

For better performance and to limit risk to large databases, restricting the number of records returned from a search is recommended. Refer to “Maximum Rows Returned by Search” for more.

To conduct a search

1. Log in to the e-Series site.
2. Select Directory in the top navigation bar.
3. Select Directory> Search in the side index to display the Advanced Search page.
4. Enter the criteria upon which you want to base the search. For example, if you want to search for customers whose last names begin with the letter H, enter H in the Last, First field.
5. Click search to display the Search Results page(s).



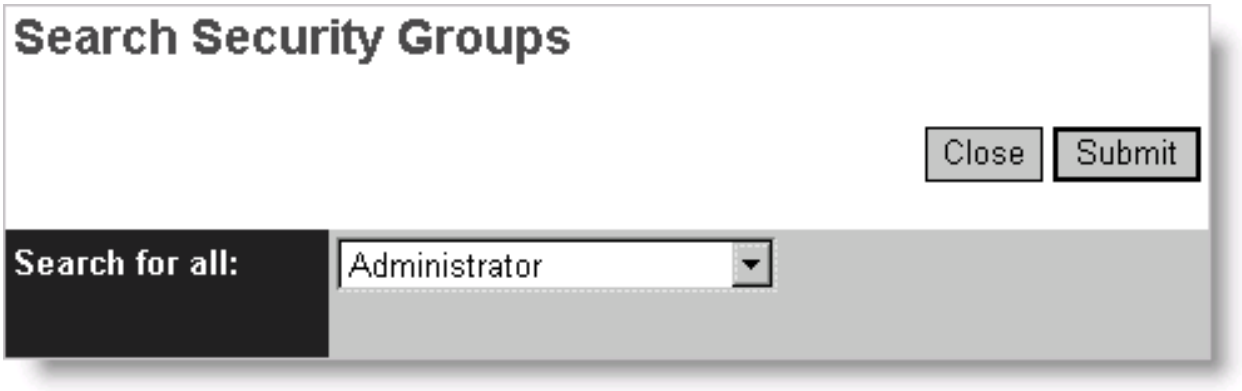
Advanced Search page

To conduct a security search

The Security Search function allows you to search by security group.

1. Log in to the e-Series site.

2. Select Directory in the top navigation bar.
3. Select Directory> Search in the side index to display the Advanced Search page.
4. Click security search to display the Search Security Groups page.
5. Select a security group from the Search for all drop-down list.
6. Click Submit to display the Search Results page.

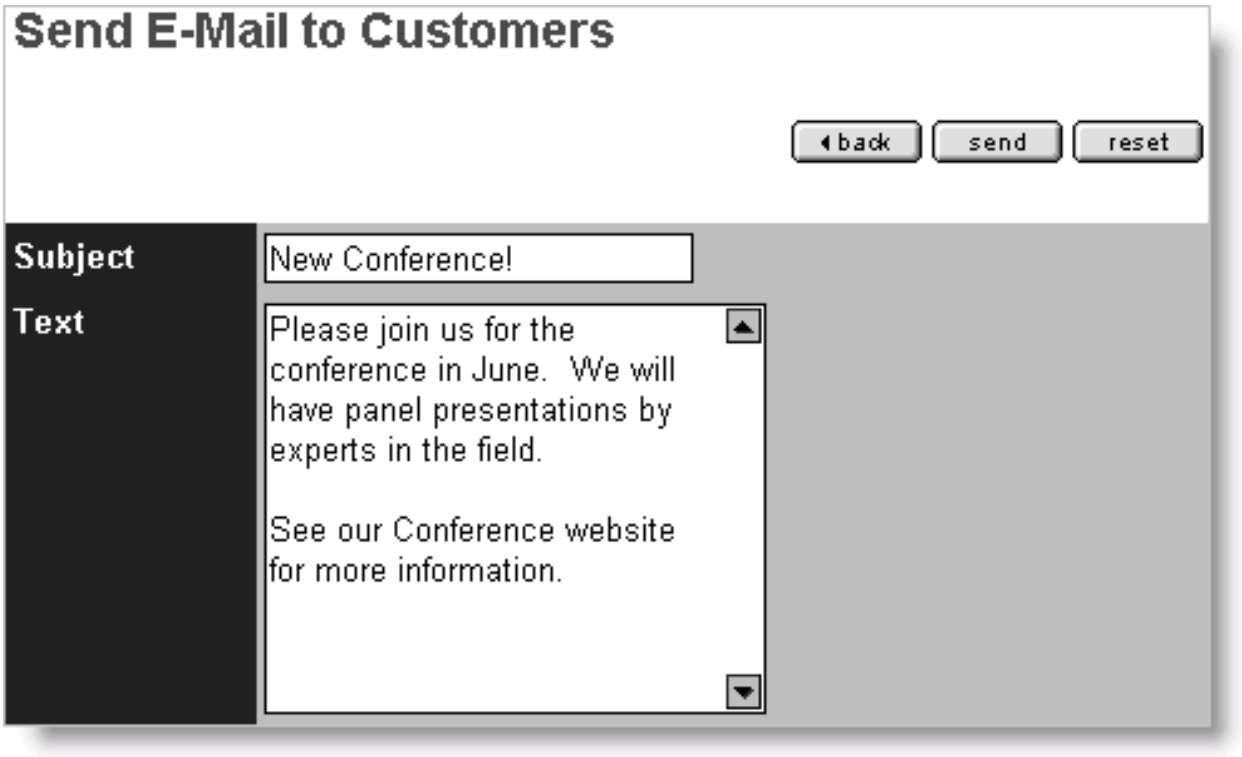


Security Groups page

To email customers returned by a search

After you conduct a search, you can e-mail the customers whose records were returned from the search.

1. On the Search Results page (Directory> Search> click search), click email members to display the Send E-Mail to Customers page.
2. Enter the Subject of the e-mail message.
3. Enter the content of the e-mail message in the Text field.
4. Click send.



Send email to Customers page

Hands-on exercise: Use the directory search feature

1. Find Marcie Farmhaven's customer record using the directory.
2. Export the following fields:

- FULL_NAME
- ADDRESS

Using the Speed Search Utility

The Speed Search utility is similar to the Search utility except that fewer, more specific fields are searched. The fields on the Speed Search page are pre-defined and non-configurable.

To conduct a speed search

1. Log in to the e-Series site.

2. Select Directory in the top navigation bar.
3. Select Directory> Speed Search in the side index to display the Speed Search page.
4. Enter the criteria upon which you want to base the search.
5. Select the appropriate Chapter from the drop-down list.

   Note: The Chapter drop-down list defaults to the logged-in user's chapter entered in the Chapter table, so be sure to select the correct chapter.
6. Click search to display the Search Results page.

   Note: At the conclusion of a search, click the reset button on the Search page to remove the existing search criteria.

Signing Up a New Customer

e-Series allows enables customers to sign up directly for an e-Series site and simultaneously create a user login and password. You also can sign up other customers and create security logins and passwords for them.

When a customer submits a site registration to an organization using e-Customer Management, that information is entered directly into the iMIS database and is accessible instantly within the iMIS system (note that this is not an application process).

New site users are assigned to a security group that you configure in the e-Customer System Parameters. After you set up your security groups, you can limit the fields that customers can view and edit. If you log in as an administrator, all available fields are visible.

You have the option of allowing new users to create their own login and passwords. Typically, a new user is assigned to the Web member type and the Anonymous security group, and their assignment is valid for three months.

An email message is sent to the designated staff person notifying the organization that a person has signed up. The prospective customer receives an email message (which you can customize) that confirms receipt of the user's information.

About signup fields

When a user opens the Sign Up page in e-Series, each signup field is verified against its related security filter to determine the user's privileges and whether the field is a required field. A key at the top of the Sign Up page shows the symbols for required fields.

Required field validation

Customers who try to submit an incomplete signup form are informed that their entry is incomplete and that their information has not been submitted. The message may also include information on the State, Country, and Zip fields if the option requiring these fields has been enabled. A red notation is displayed next to the required fields that have been left blank on the Sign Up page.

Email format validation

Email addresses entered in e-Series are checked to ensure that they are properly formatted, that is, they contain the @ symbol, they have no embedded spaces, and they end in characters separated by a period.

Note: Only the email address format is validated, not the address itself. Therefore a customer could enter a properly formatted, invalid email address, and it would be accepted.

About Address Flow Down

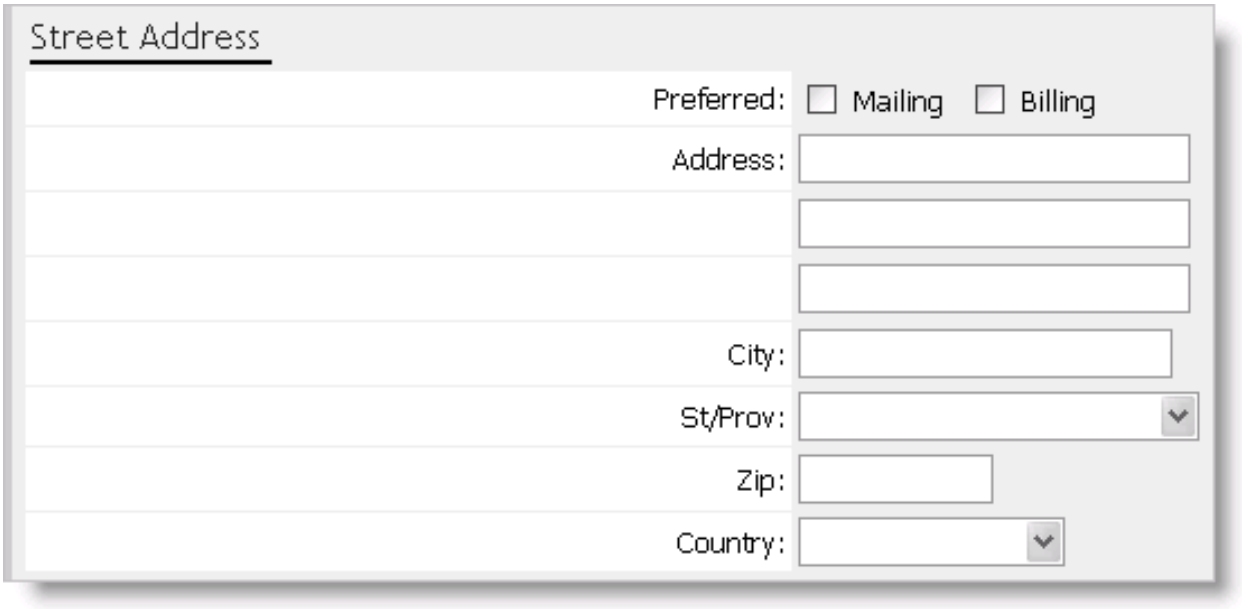
The flow down of company information to new records functions only when Disable Auto Flow Down of company address Information is disabled in the iMIS Customer Setup - Advanced window.

When a user selects a company record, the following fields automatically populate with the company information: Company, Work Phone, Fax, Toll Free, and Address1.

Note: To enable the Company Search function and the flow down of the company information, Insert must be enabled for both the Member - Company Name and Member - Company ID security filters. If these filters are not enabled, but the Search for Member - Company ID is enabled, the company record will not be associated with the member record.

Third address line support in e-Series

e-Series supports a third address line for all postal/street address areas. You can enter a third line for an address wherever the address appears in e-Series.



Example of the third address line for a Street Address

Example of the third address line in a customer record

To sign up a new customer

When you open the Sign Up page, the Company Search page also opens, requesting your company affiliation. If you enable Yes for company affiliation, Company ID and Company Name fields display which allow the values in the text fields to be searched. A search result of matching companies based on the entries in the text fields will display. You have the choice of selecting a record or returning to the search function.

1. Select Sign Up in the top navigation bar to display the Company Search page.

2. (optional) If you are affiliated with a company, enable Yes on the Company Search page to display the Company ID and Company fields.

- Enter your Company ID. This ID is associated with the parent company for the customer who is signing up.
- If you do not know your company's ID, enter the full or partial company name in the Company field.
- If you want to search for your company, click Search to display the Company Search Results page. If your company is listed, select the company's ID. If your company is not listed, click back to search again, or click close to go to the Sign Up page.

3. (optional) If you are not affiliated with a company, enable No and click Next to display the Sign Up page.
4. (optional) If you are affiliated with a company and did not enter your company information in the Company Search page,

- Enter your Company ID.

  If you do not know your company's ID, click company search to display the Company Search page and repeat Step 2.

- Enter the name of your Company.

5. Enter your customer information in the Sign Up page(s). If custom pages have been created, sign up fields will display either on a single Sign Up page or on multiple Sign Up pages depending upon the settings in the e-Customer System Parameters.

   Note: An asterisk denotes a required field.

6. Click submit.
7. (optional) If the Sign Up Confirmation Screen option is disabled in the e-Customer System Parameters, a message displays confirming that your customer information was inserted successfully.

   Click OK to log in to the site and open your customer profile.

8. (optional) If the Sign up Confirmation Screen option is enabled in e-Customer System Parameters, the Confirm Information page displays:

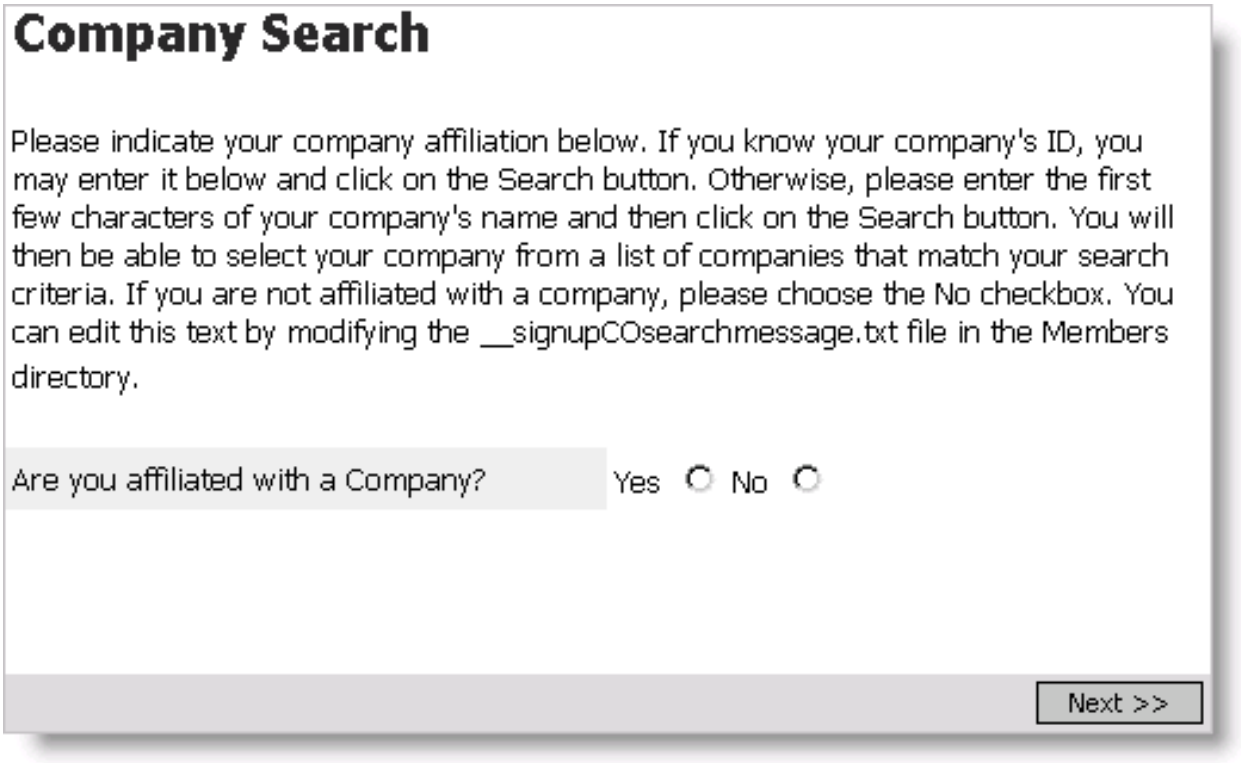
- Verify that the information is correct.
- Click edit and make any necessary changes.
- Click submit. The More Information page displays.

9. Select Create Login and Password to open the Security Insert page, and enter your Login and New Password.

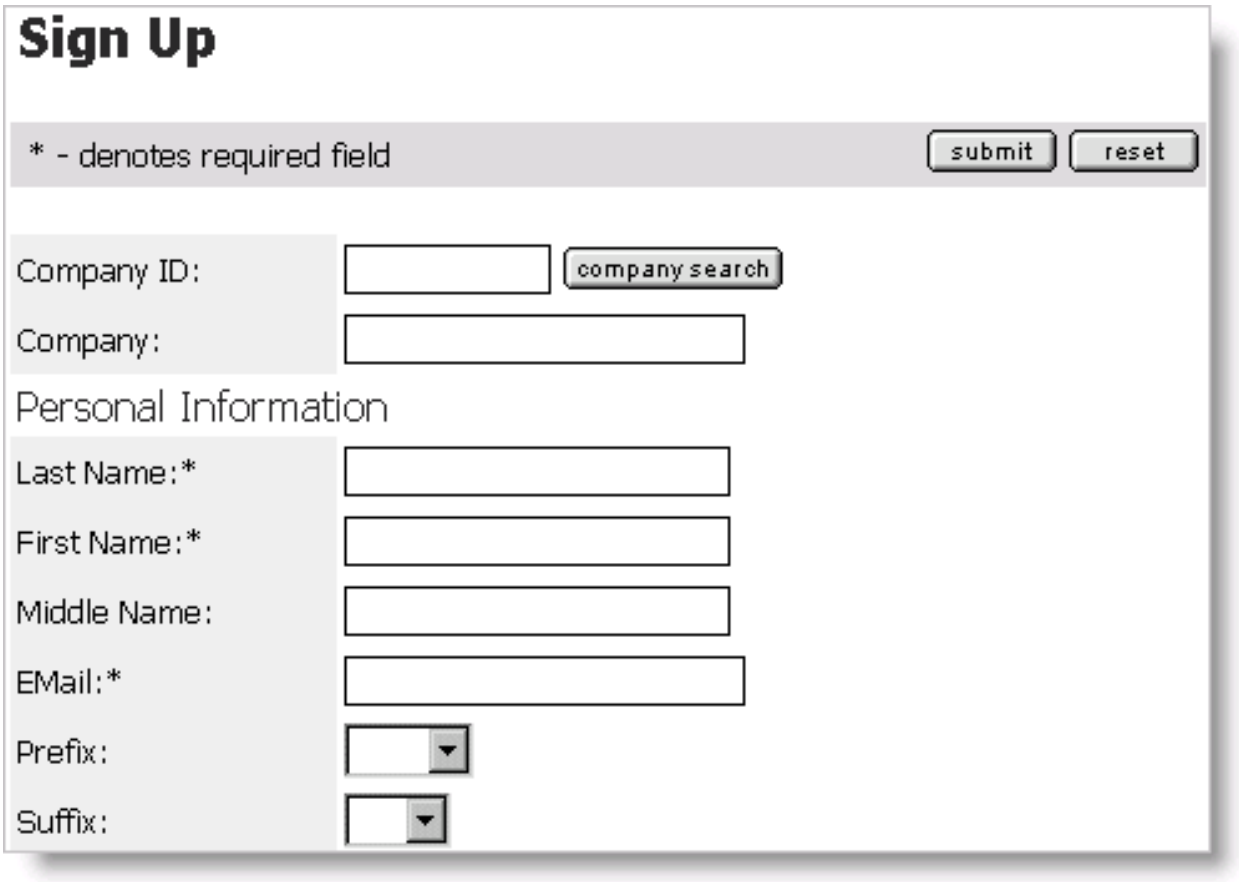
   Note: The Login and New Password fields may display at the bottom of the Sign Up page if the Single page with all user-defined windows option is enabled in the e-Customer System Parameters.

10. Click submit, and click OK.

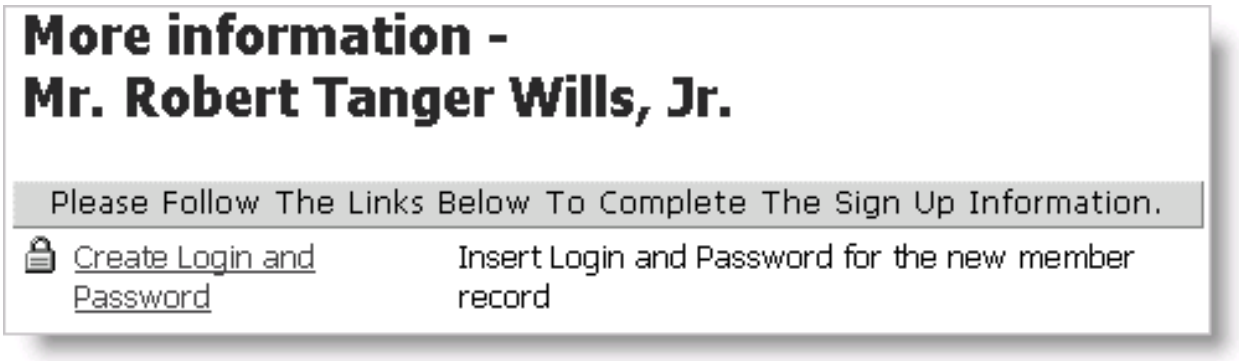
    Note: When the new member record has been submitted, the organization contact is sent an email.



Company Search page



Sign Up page



More information page

Hands-on exercise: Sign up a new customer

1. Log in to your e-Series site and enter the following name and address information:

- Name: Michael Benton
- Address: 3323 Elmwood, Houston, TX 71344

2. Enter the following login security information:

- Login: Benton
- Password: Mike01
- Expiration Date: 09/28/01

Editing Logins and Passwords in e-Series

All user passwords are hashed in the database. Hashed passwords cannot be unencrypted, and users must reset their passwords if they are lost or forgotten.

User passwords also are hashed when sent across networks. They are hashed when sent from the Security Edit page to the server before being saved to the database, and users must know their existing passwords to change them.

Hashing is a form of encryption that transforms a string of characters into a fixed-length value or key that represents the original string. Hashing functions are always a one-way operation, and this type of encryption commonly is used to protect user passwords since they cannot be unencrypted.

e-Series users can change their passwords in e-Series. However, any password changes made in e-Series do not result in the user's password being updated on the User Passwords window in iMIS (select File> System Setup, and click User Passwords). For this reason, staff users should change their password on the User Passwords window. When a password is changed on the User Passwords window, the user's e-Series password is also changed to the new password.

To edit your login and password

Non-administrative users are required to enter their old passwords when changing and submitting their passwords, and the passwords will be encrypted when uploaded to the server as an additional measure of security.

1. Log in to your e-Series site.

2. Select your record from the side index to display your profile.
3. Click security to display the Security Edit page.
4. (optional) Edit your Login.
5. Enter your New Password.
6. Reenter your new password in the Verify New Password field.
7. (For non-administrative users only) Enter your Old Password.
8. Click submit to save your new password.
9. Click OK.

To edit another customer's login and password

You must have either administrator privileges or the correct security privileges to edit a customer record other than your own. If for any reason an administrator changes another user's password, the administrator must supply the user with the new password in order for the user to log in to their site.

Note: Any changes an administrator makes to a user's record are logged in the system.

1. Log in to the e-Series site.
2. Search for the customer's record that you want to edit. Refer to “Using the Search Utility” for more.
3. Select the customer's record to open the customer's profile.
4. Click security to display the Security Edit page.
5. Make any necessary changes and click submit.

Resetting User Passwords

You must reset your password when it is lost or forgotten. Requiring users to reset their passwords provides an additional level of security in preventing unauthorized users from

gaining access to logins and passwords. To reset your password, you must have a valid email address listed in your record.

Authenticating User Information

For a user to reset their password, they must be able to authenticate specific information stored in their record in the iMIS database. If a user does not authenticate all of the required information, they will not be able to reset their password.

A user's email address is the only information that always requires authentication when resetting passwords. It is required so that e-Series can send the Reset my password link to the correct email address for the authorized user who needs to reset their password.

e-Series administrators may, however, require authentication of any or all of the following information in addition to the user's email address:

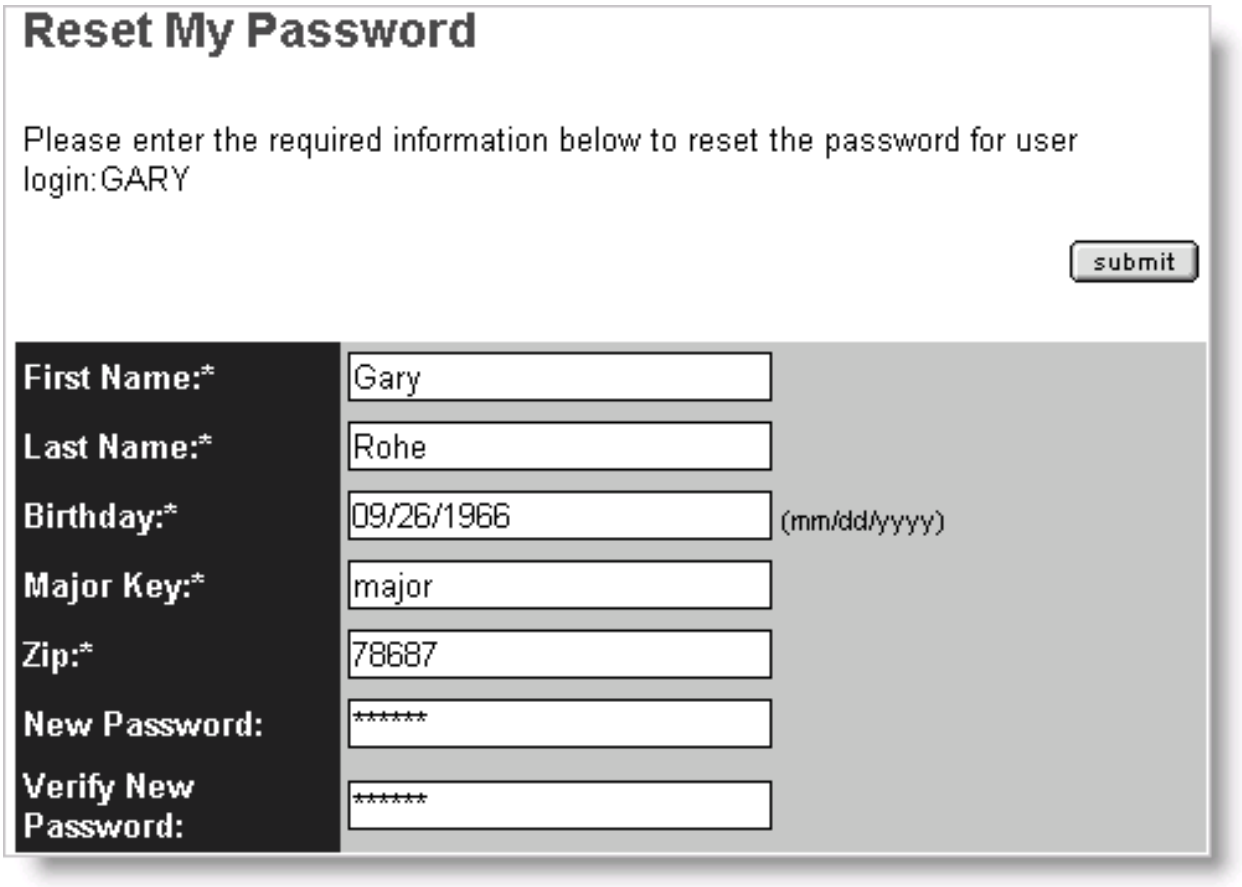
1. First Name
2. Last Name
3. Birthday
4. Major Key
5. Zip (from the preferred address) - Users are not required to enter their entire zip. They can enter a subset, and iMIS will match it with the value in Name.ZIP.

If an administrator requires authentication of any information in addition to the user's email address, the user will be required to enter the correct information in the Reset My Password page before the system will accept their new password. If an administrator does not require authentication of additional information, the user will have to enter only their new password.

Requiring authentication of additional user information serves two purposes:

1. It provides an additional level of security that helps prevent unauthorized users from accessing other users' logins and passwords. Only an authorized user should be able to authenticate the information required for resetting their login and password.

2. It helps eliminate the possibility of multiple users having identical logins and passwords. If more than one user's record matches the information submitted for authentication, no email containing the Reset my password link will be sent. The user will have to contact the e-Series administrator in order to reset their password. This should not happen if the administrator requires users to authenticate several fields.



Example of the Reset My Password page

To reset your password

If you lose or forget your login and password and have a valid e-mail address listed in your record, you can request that e-Series email a link to you so that you can reset your password. If you do not have a valid email address listed in your record, you will have to contact your site's administrator in order to reset your password.

1. Open your e-Series site and select Login in the top navigation bar.

2. Select Reset my password to open the Reset My Password page.
3. Enter your email address in the e-Mail field.
4. Click submit. An email containing the Reset my password link will be sent to you.
5. Click OK.
6. Open your email program to receive the email containing the Reset my password link.
7. Select the Reset my password link to open the Reset My Password page. Your user login will be included on the page.

   Note: The email contains a link that you can copy and paste into your browser's address field.
8. Enter the correct information in any of the fields requiring authentication:

- First Name
- Last Name
- Birthday
- Major Key
- Zip (You are not required to enter your entire zip. You can enter a subset or partial value, and iMIS will match the value with the zip in the database.)

9. Enter your New Password.
10. Reenter your new password in the Verify New Password field.
11. Click submit.

Logging In as Another User

Administrators can log in as another user without entering the user's login and password by simply opening. An administrator simply has to open a user's record on the Profile page and click the login as button to log in as the user

When an administrator logs in as another user, the administrator goes directly to the user's home page without logging in. The administrator sees the same information the user sees and has the same authorization levels as the user. The administrator literally becomes the user in the system and can make any necessary changes for a user that is having problems. If an administrator wants to log back in as Administrator after logging in as another user, the administrator will have to log in again.

Note: To log in as another user, the user must be in either the same or a lower security group than the administrator. An administrator cannot log in as another administrator who is a member of a higher security group.

Logging administrative access

If an administrator changes a user's data while logged in as that user, the data will appear to have been changed by the user. However, by viewing the change log, you can determine whether or not an administrator made any changes to the user's data while logged in as the user.

All administrative 'login as' entries are logged in a text file. This log reflects all instances when an administrator assumes another user's identity and any changes an administrator makes to another user's data. The text file is named loginas_log.txt and is stored in the StaticContent/StaticPages directory. The flat file format is:

User 1120 Logged in as 1155 from 172.16.10.106 on 12/07/2002 @ {t '10:17:12'}

User 1120 Logged in as 1126 from 172.16.10.106 on 12/09/2002 @ {t '13:04:33'}

To log in as another user

1. Log in to your e-Series site as an administrator.
2. Select the user's record from the directory and open it on the Profile page.
3. Click the login as button.
4. Click OK to open the user's Home page.
5. Make any necessary updates to the user's record and then log back in as yourself using your own login and password.

Editing Records in e-Series

You can edit your own record in e-Series as well as other customer records if you are an administrator or have the appropriate security privileges.

Remember that information access is governed by the security filters enabled for a particular user group on the Detail Security page. For example, if a designation is defined for a customer in iMIS, but the MEMBER-DESIGNATION filter is disabled for your user group, you will not be able to see or edit a user's designation.

Consider the following before editing records in e-Series:

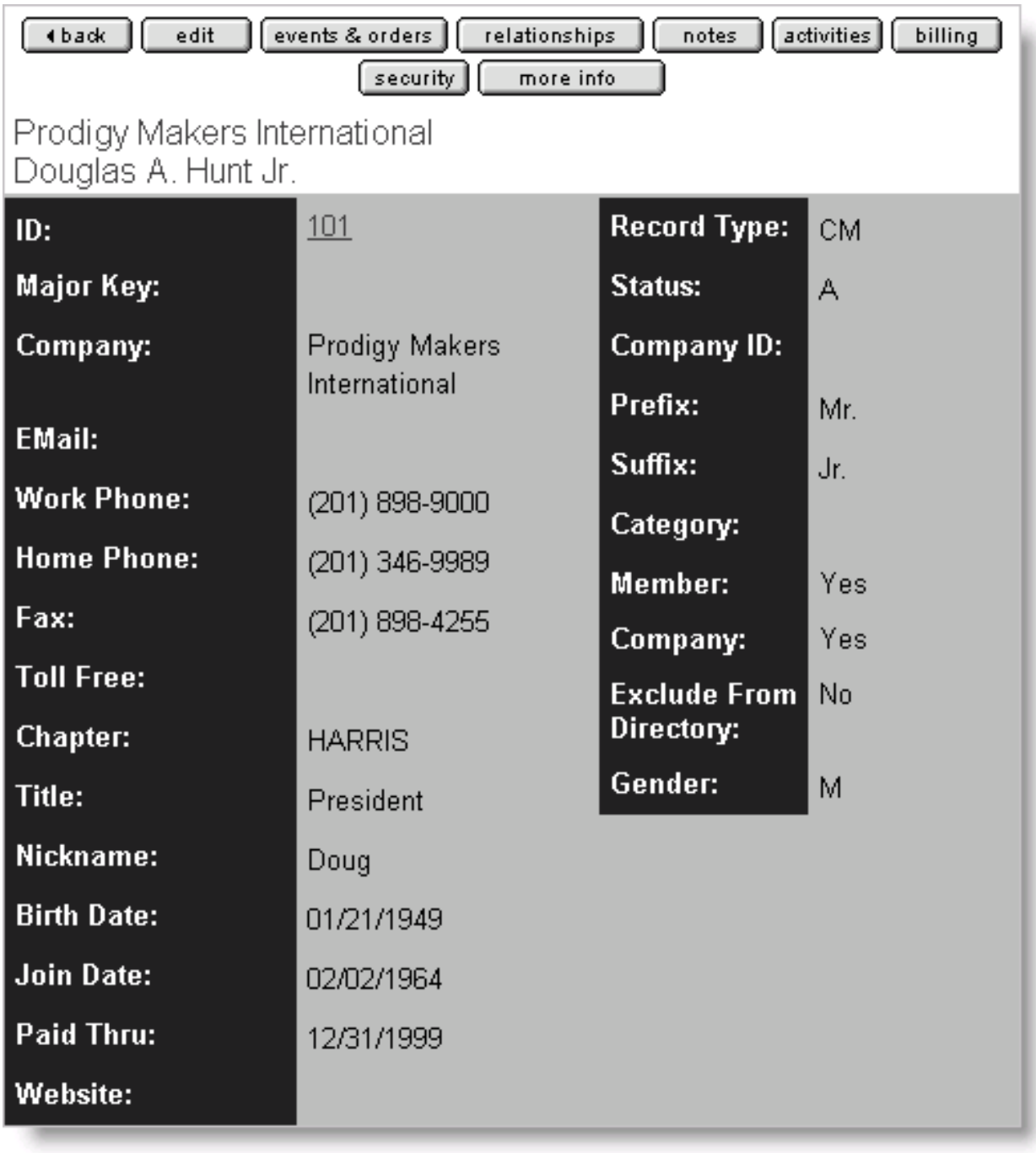
- In e-Series, you can edit only the three addresses defined in iMIS.
- Customers whose member status begins with the letter “D” are not allowed to log in.
- Do not edit or add member types in e-Series, only in iMIS.

Determining who changed records

Administrators can determine who made changes to records, and whether the changes were made in iMIS or in e-Series. For changes made to user records, the Change Log shows the user's name if the record was edited in iMIS or the user's ID if the record was edited in e-Series.

To edit your customer record

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click edit to display the Edit page.
4. Edit the information.
5. Click submit. A message displays confirming that the information updated successfully.
6. Click OK to return to your profile. An email message is sent to the organization indicating that a customer's record has been updated.



Customer Profile

To edit another customer's record

You must have either administrator privileges or the correct security privileges to edit a customer record other than your own.

1. Log in to the e-Series site.
2. Search for the customer's record that you want to edit. Refer to “Using the Search Utility” for more.
3. Select the customer's record to open the customer's profile.
4. Click edit to open the customer's Edit page.
5. Edit the customer's record.
6. Click submit. A message displays confirming that the customer's information updated successfully.
7. Click OK to return to the selected record.

Viewing Customer Activity Records

e-Series allows you to view and modify your existing activity records. Some activity types, such as AWARD, CALL, CEU, and LETTER, also allow you to insert new activity records in e-Series.

To insert customer activity records

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click activities to open the Activities Available page.
4. Select an activity type to open the Activities page.
5. Click insert activity to open the Activity page.
6. Enter the information for the activity.
7. Click submit.
8. Click OK.

Activity page

To view and modify existing customer activity records

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click activities to open the Activities Available page.
4. Select an activity from the list to open the Activities page and view the related activities.

5. Select a specific activity to open the Activity page and view the activity details.
6. (optional) Click modify activity to open the Activity Modification page.
7. Make any necessary modifications.
8. Click update.
9. Click OK.

Viewing Additional Customer Information in e-Series

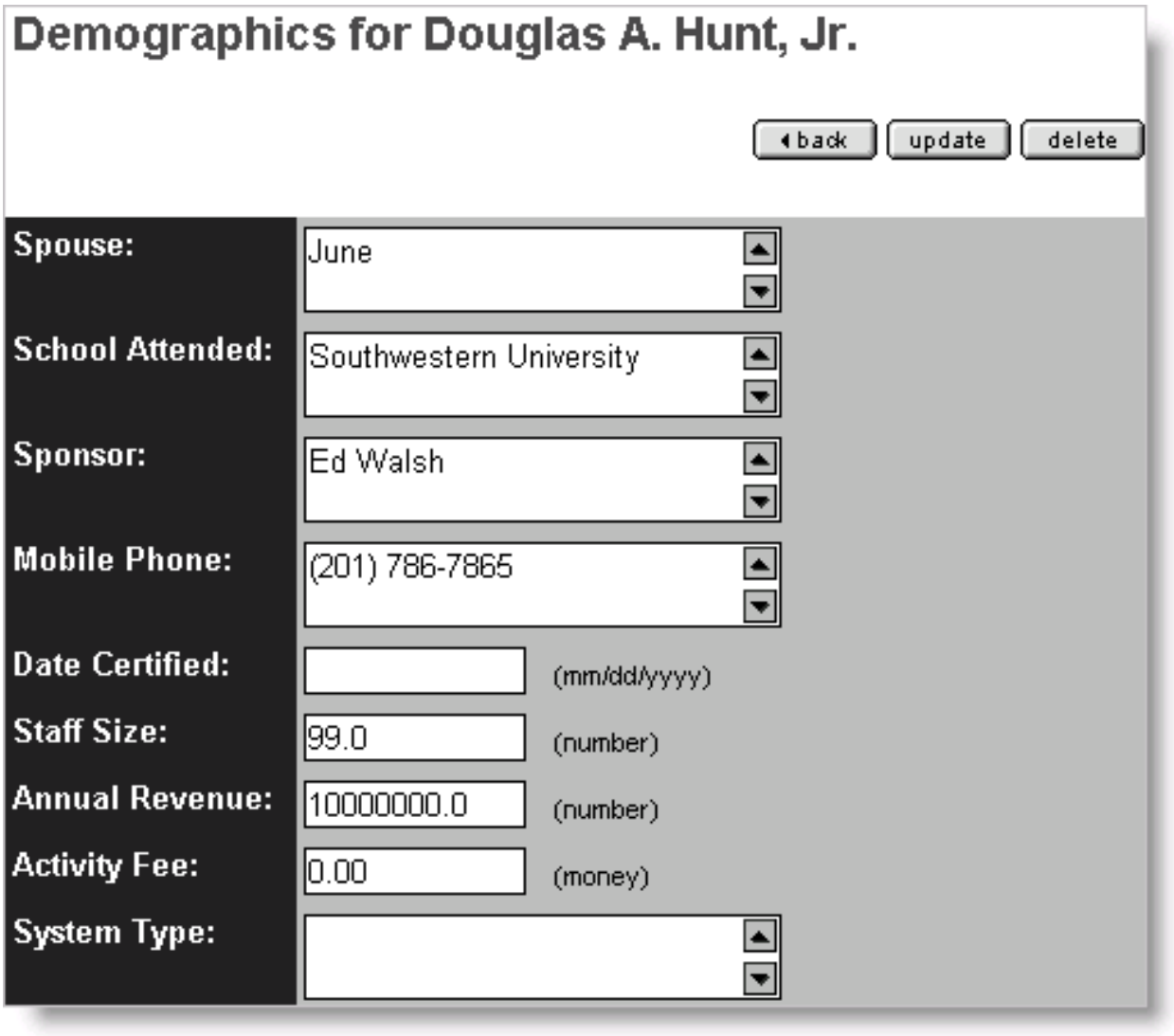
If custom windows have been set up for your e-Series site, you can view, modify, and delete the information they contain. The information contained within these windows will vary depending on organizational needs.

To view, edit, and delete additional customer information

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click more info to open the Edit Information page.
4. Select a link to open its corresponding page and view your information.
5. (optional) If you want to edit or delete the information,

- Make any necessary edits and click update, or
- Click delete to delete the information.

Edit Information page



Demographics page

Recording Relationships

e-Series allows you to record relationships between individuals, customers, and organizations. For example, you could create and record a relationship that reflected your organization's affiliation with another organization.

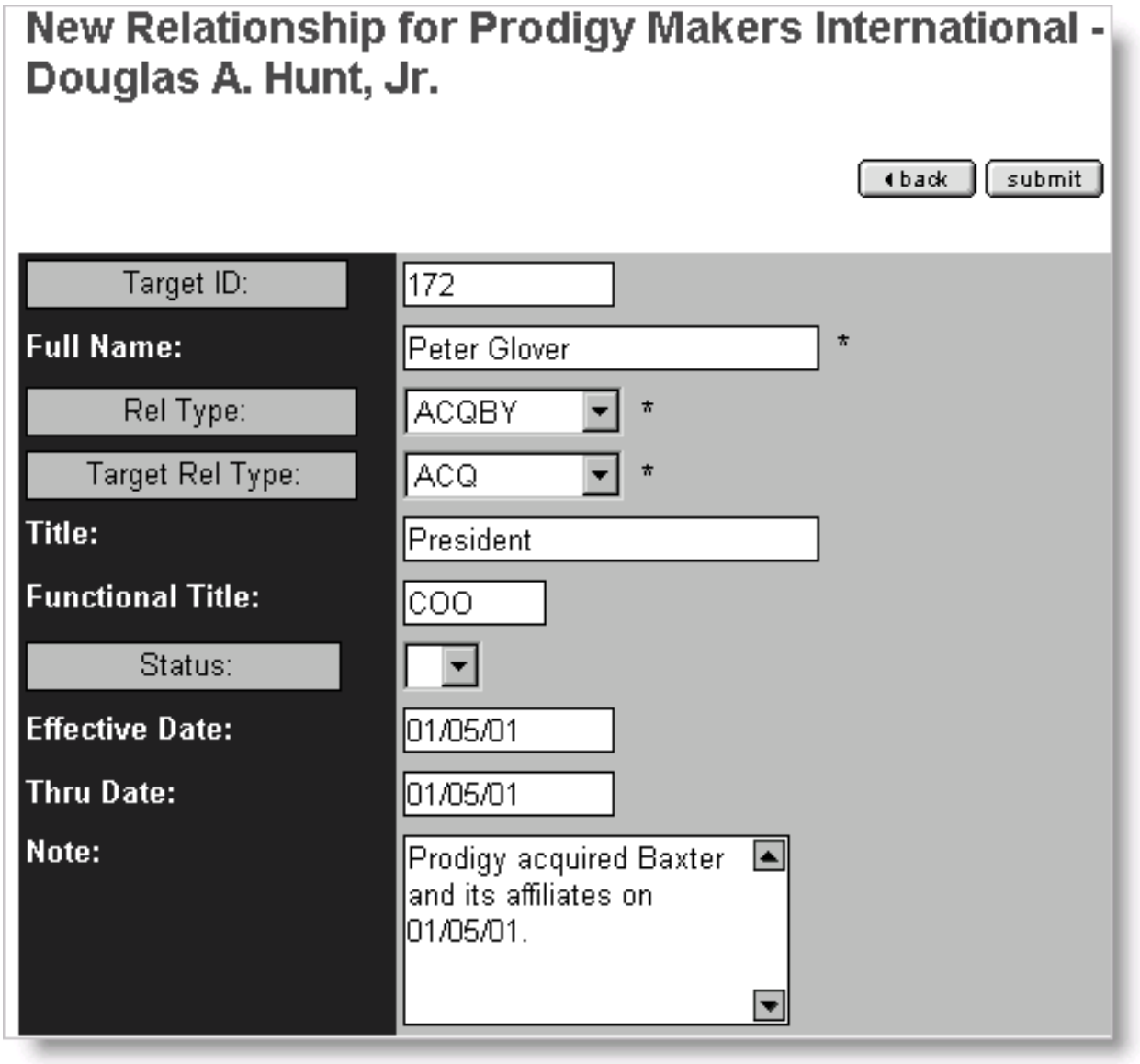
To record a relationship

1. Log in to your e-Series site.

2. Select your record from the side index to display your profile.
3. Click relationships to open the Relationships page.
4. Click new relationship to open the New Relationship page.
5. Enter the contact's relationship information. The following fields are required to be populated before submitting the relationship:

- Full Name - Enter the contact's full name.
- Rel Type - Select your or your organizations position in the relationship.
- Target Rel Type - Select the contact's or the contact organization's position in the relationship.

6. Click submit.



New Relationship page

To view, edit, and delete a relationship

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click relationships to open the Relationships page.
4. Select the Full Name to view the relationship information.
5. (optional) If you want to edit or delete the relationship,

- Make any necessary edits and click update, or
- Click delete to delete the relationship.

Entering Notes

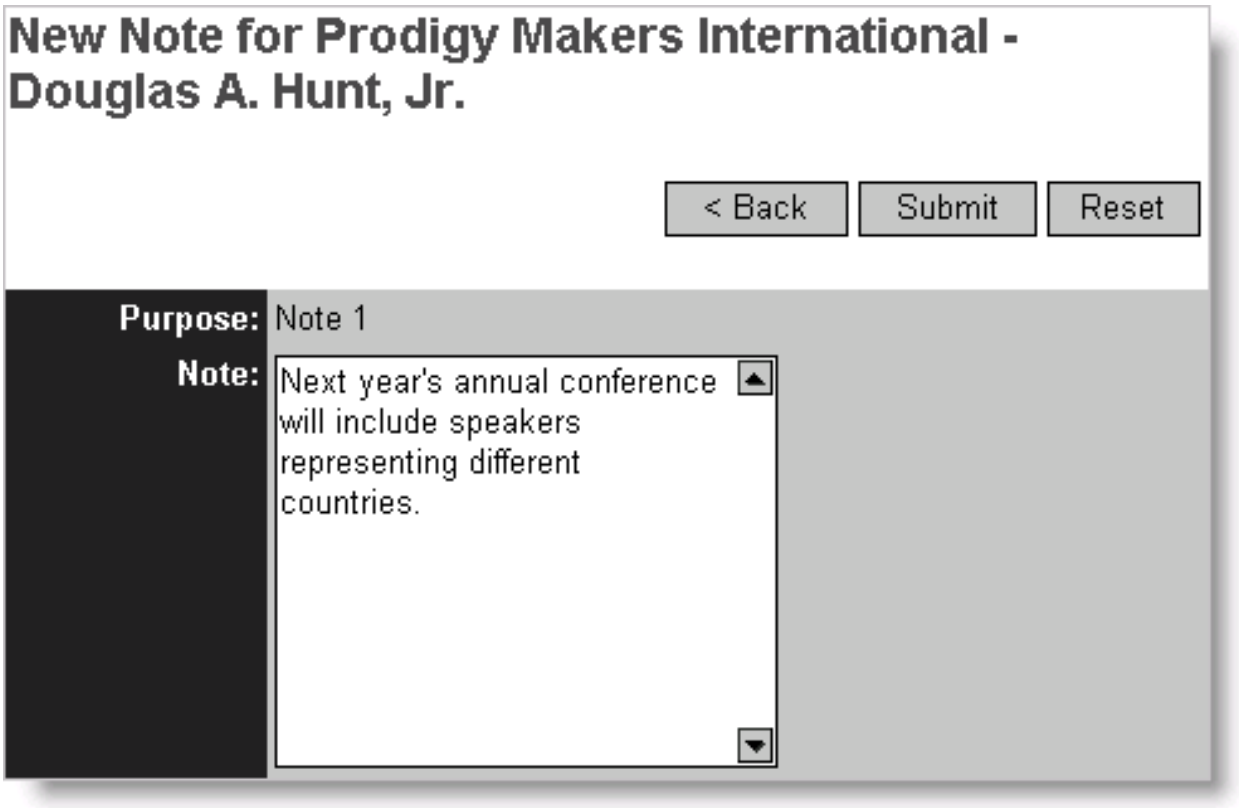
e-Series allows you to add notes to your customer record. Notes are good places to record personal and professional accomplishments and any information that you want to access quickly and easily.

To enter notes

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click notes to open the Notes of page.
4. Click Note 1 or another note prompt to open the New Note page.
5. Enter your Note in the available text area.
6. Click Submit.
7. Click OK.

Notes of Prodigy Makers International - Douglas A. Hunt, Jr.
< Back
Note 2
Note 3
Purpose
Note
Additional Notes
Doug has been a pivotal member of our association and has expressed a willingness to volunteer in various capacities in the future.
Note 1
Next year's annual conference will include speakers representing different countries.

Notes page


New Note for Prodigy Makers International - Douglas A. Hunt, Jr.
< Back
Submit
Reset
Purpose:
Note 1
Note:
Next year's annual conference will include speakers representing different countries.

New Note page

To view, edit, and delete notes

1. Log in to your e-Series site.
2. Select your record from the side index to display your profile.
3. Click notes to open and view your notes in the Notes of page.
4. (optional) Select the note that you want to edit or delete to open the Edit Note page.
5. (optional) If you want to edit the note,

- Make any necessary edits and click Update.
- Click OK.

6. (optional) If you want to delete the note,

- Click Delete.
- Click OK.

Using e-Billing

e-Billing allows customers to pay for Dues items through an e-Series site and provides many powerful features:

- Client/Server transaction processing
- Unified basket for single payment across licensed e-Series modules (e-Events, e-Orders, and e-Billing)
- Customer control of voluntary items and contribution amounts
- Ability to display required items as one-line summaries or individual line items

The goal of this section is to give you the knowledge and skills necessary to set up and use the e-Billing module.

After completing this section, you will be able to do the following:

1. View outstanding balances

2. Make and edit online payments
3. Describe the financial aspects of e-Billing

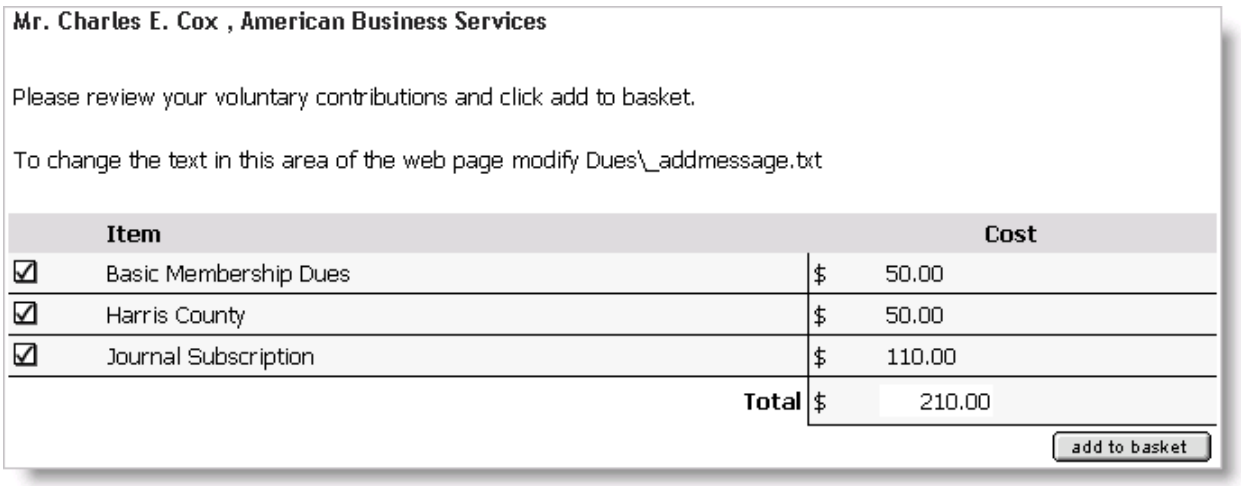
Viewing an Outstanding Balance

In e-Billing, customers and administrators can view outstanding Dues balances.

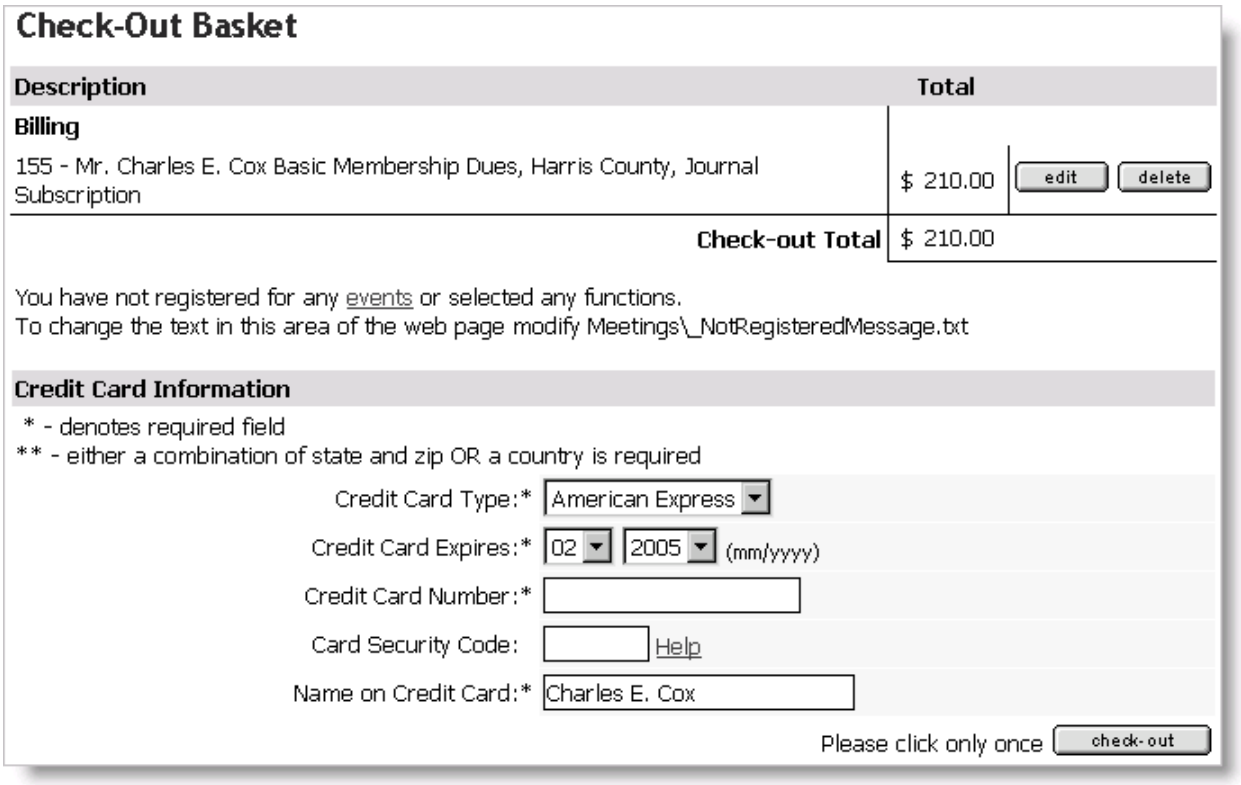
To view an outstanding balance

If the e-Billing Notice option is enabled in the e-Billing System Parameters, e-Billing Reminder links display in the side index and top navigation bar for customers with outstanding Dues balances. Logged in customers with outstanding Dues balances can select the links to go directly to the
e-Billing page.

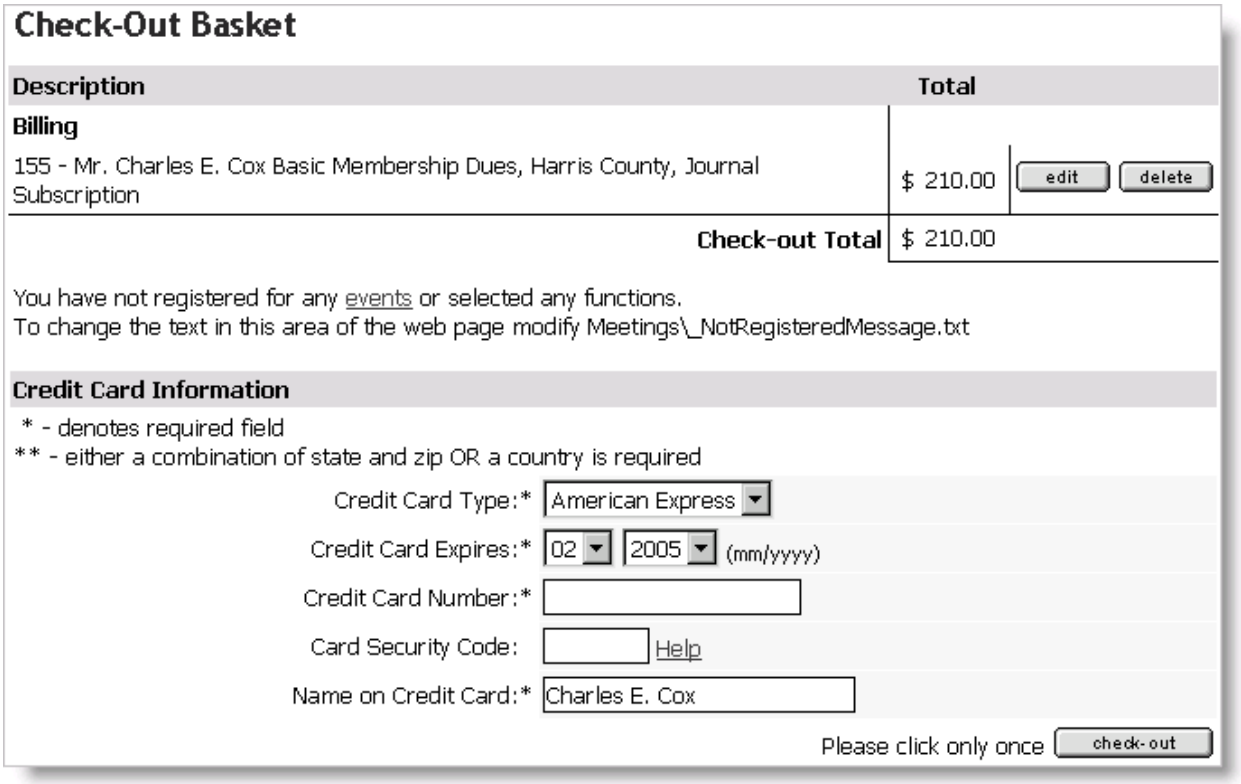
1. Log in as the customer whose balance you want to view.
2. Select Profile> [customer name] to display the Customer Information page.
3. Click billing or select one of the e-Billing Reminder links (if displayed) to display the e-Billing page.
4. Click add to basket to display the Check-Out Basket page and view any outstanding items.



View outstanding balance on Customer Information page



e-Billing page



Check-Out Basket page

Making Online Payments

In e-Billing, customers can make online credit card payments if the Enable e-Billing option is enabled in the e-Billing System Parameters.

To make an online payment

Customers with outstanding Dues balances are required to make payments in full at the time of check-out.

If the e-Billing Notice option is enabled in the e-Billing System Parameters, e-Billing Reminder links display in the side index and in the top navigation bar for customers with outstanding Dues balances. Logged in customers with outstanding Dues balances can select the links to go directly to the e-Billing page.

1. Log in to your e-Series site.
2. Select Profile> [customer name] to display the Customer Information page.
3. Click billing to display the e-Billing page.
4. Select the item(s) you wish to pay for by enabling the checkbox.

   If you have an outstanding mandatory Dues balance, the Dues item is selected automatically and cannot be deselected. You will be required to make the payment in full for the Dues item at the time of check-out.
5. (optional) If you want to pay a different amount than the amount listed for a voluntary item such as a PAC Contribution or a donation, enter the desired amount in the voluntary item's text box under the Cost category.
6. Click add to basket to display the Check-Out Basket page.

   Note: If PayPal is enabled, additional information is requested in the Credit Card Information area.
7. Enter the credit card information and click check-out to display the Purchase Detail page.

You will receive a Purchase Confirmation by e-mail containing both billing and order information.

To edit an online payment

1. Navigate to the Check-Out Basket page.

   If the e-Billing Notice option is enabled in the e-Billing System Parameters, e-Billing Reminder links display in the side index and in the top navigation bar for customers with outstanding Dues balances. Logged in customers with outstanding Dues balances can select the links to go directly to the e-Billing page.

2. On the Check-Out Basket page, click edit to display the e-Billing page. The e-Billing page has three buttons:

   cancel button - Click to return to the Check-Out Basket page without making any edits.

   remove all button - Click to remove all the items from the check-out basket.

   check-out button - Click to save any edits and return to the Check-Out Basket page.

3. Perform one of the following functions to edit your billing payment:

- Deselect individual items to remove them from the check-out basket.

  Or

- Click remove all to remove all the items from the check-out basket. A message displays asking you to confirm that all items should be removed from the check-out basket. Click OK.

4. Click check-out to save your edits and to return to the Check-Out Basket page.

Financial Aspects of e-Billing

The following summarizes the financial aspects of e-Billing:

- Customers with outstanding Dues balances are required to make payments in full at the time of check-out.

- If only dues items are in the basket, they are processed during check-out using traditional iMIS processing with a DIST line for each dues item and an overall PAY line inserted into the Trans table.
- For a mixed basket with a combination of two or more billing, events, and orders items, the following transactions are generated:
- An AR Cash receipt transaction for the full payment amount that is fully applied to a brand new prepayment invoice
- A cash-based billing payment transaction that is similar to the normal cash dues payment, except that the PAY line is an AR debit to the prepayment credit invoice
- An order payment *TAB transaction that is similar to a normal order payment, except that the PAY line is a debit to AR that is linked to the prepayment credit invoice generated by the first transaction
- A meeting transaction containing a *TAB transaction that is similar to a normal order payment, except that the PAY line is a debit to AR that is linked to the prepayment credit invoice generated by the first transaction
- Subscription date calculations occur according to iMIS processing.
- Billing items have a PAY line and two Transfer/Clearing lines (TR). Each dues item has a DIST line in addition to the two AR lines for split credit card payment, and the appropriate lines for orders and events processing.
- Items in a mixed or dues-only basket retain a balance until payment is posted.
- A new batch is created with the first transaction that occurs after midnight each day. If that batch is posted during that same day, another new batch will be created with the first transaction that occurs after the previous batch has been posted.
- Billing payments entered in e-Series are not visible in e-Series until batches are posted. This means that the opportunity exists for an overpayment to occur. For example, if a customer pays a bill in
  e-Series and returns to the site before the payment's batch posts, the site does not reflect

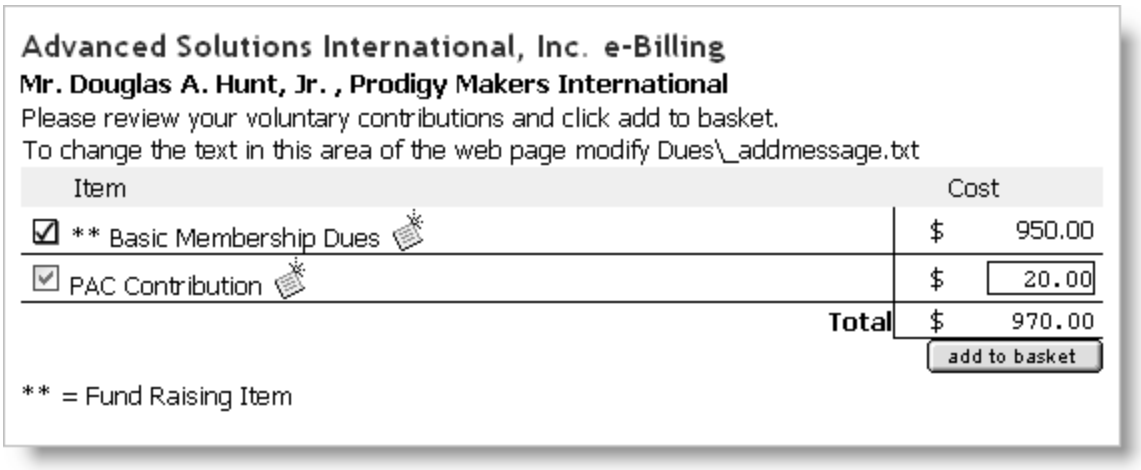
the payment, and the outstanding balance still exists.

Note: To avoid applying the payment incorrectly, close the batch containing the over-payment before closing the batch that contains the Billing payment.

Multi-entity support for e-Billing

Multi-entity support for e-Billing

You can identify items that are assigned to a Fundraising entity on the Purchase Detail screen. Two asterisks (**) appear next to the item. Multi-entity is supported at the product level in iMIS Dues billing.



e-Series supports multi-entity billing

Using e-Events

Overview of e-Events

e-Events connects to the iMIS Events module. As with e-Customer Management, all e-Series transactions are in real-time and affect the database immediately.

e-Events includes several advanced features which enable you to do the following:

- Search for and view events and event functions
- Register for an event online or by email

- View event rosters and email registrants listed on the roster
- Create and edit badge information for event registrants
- Sign up directly from the Event Registration page
- View registration order details
- View function links for more information

The goal of this section is to give you the knowledge and skills necessary to use e-Events.

After completing this section, you will be able to do the following:

- Search for an event
- Register for an event
- View event rosters
- Create badges
- View e-Events registration and payment information in iMIS
- Explain the financial aspects of e-Events

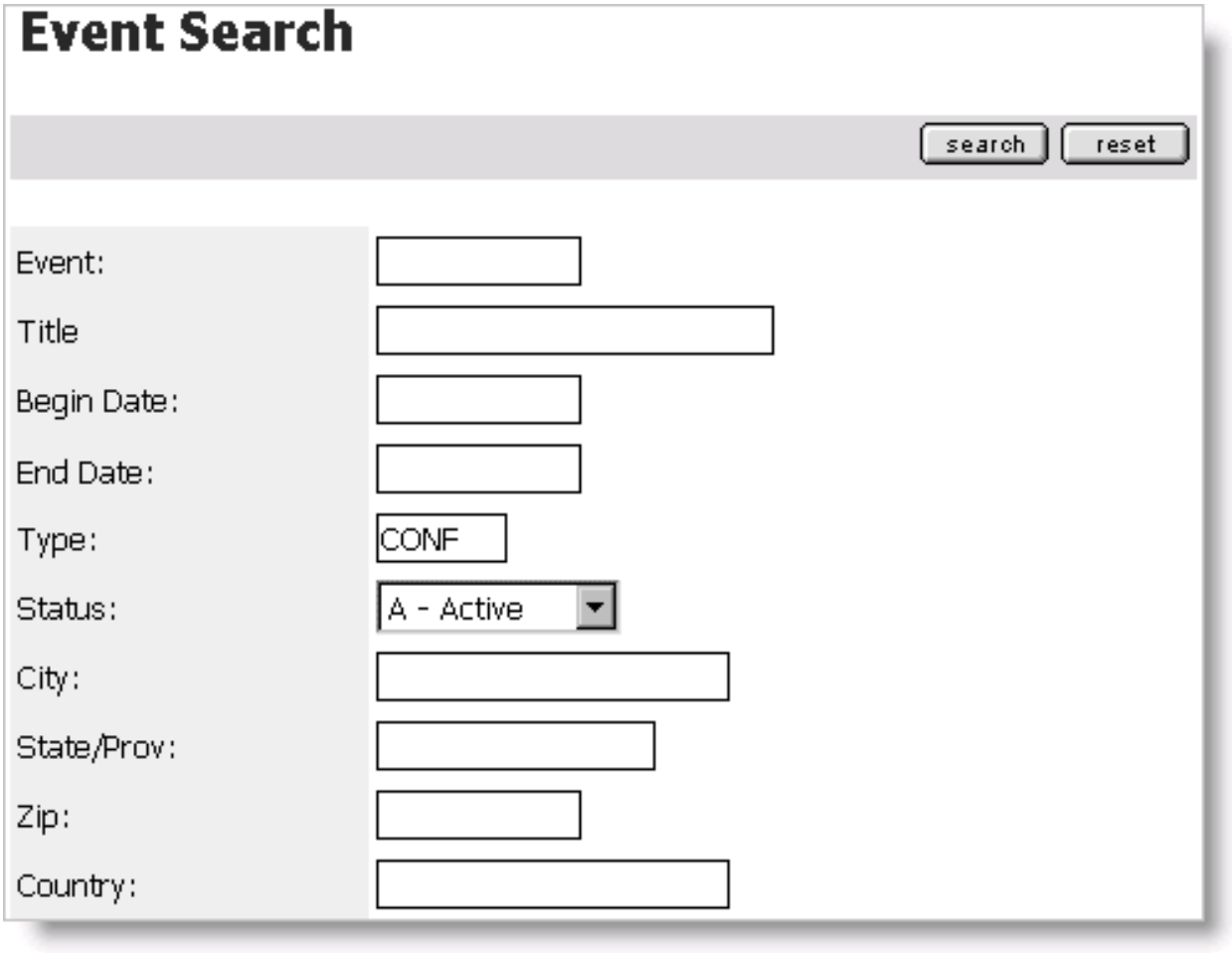
Searching for Events

Use the Events Search utility to search for specific events. You can search by event, title, date, status, location, or any combination of these options. After searching for an event, you can view all of the event information including specific event functions.

To search for an event

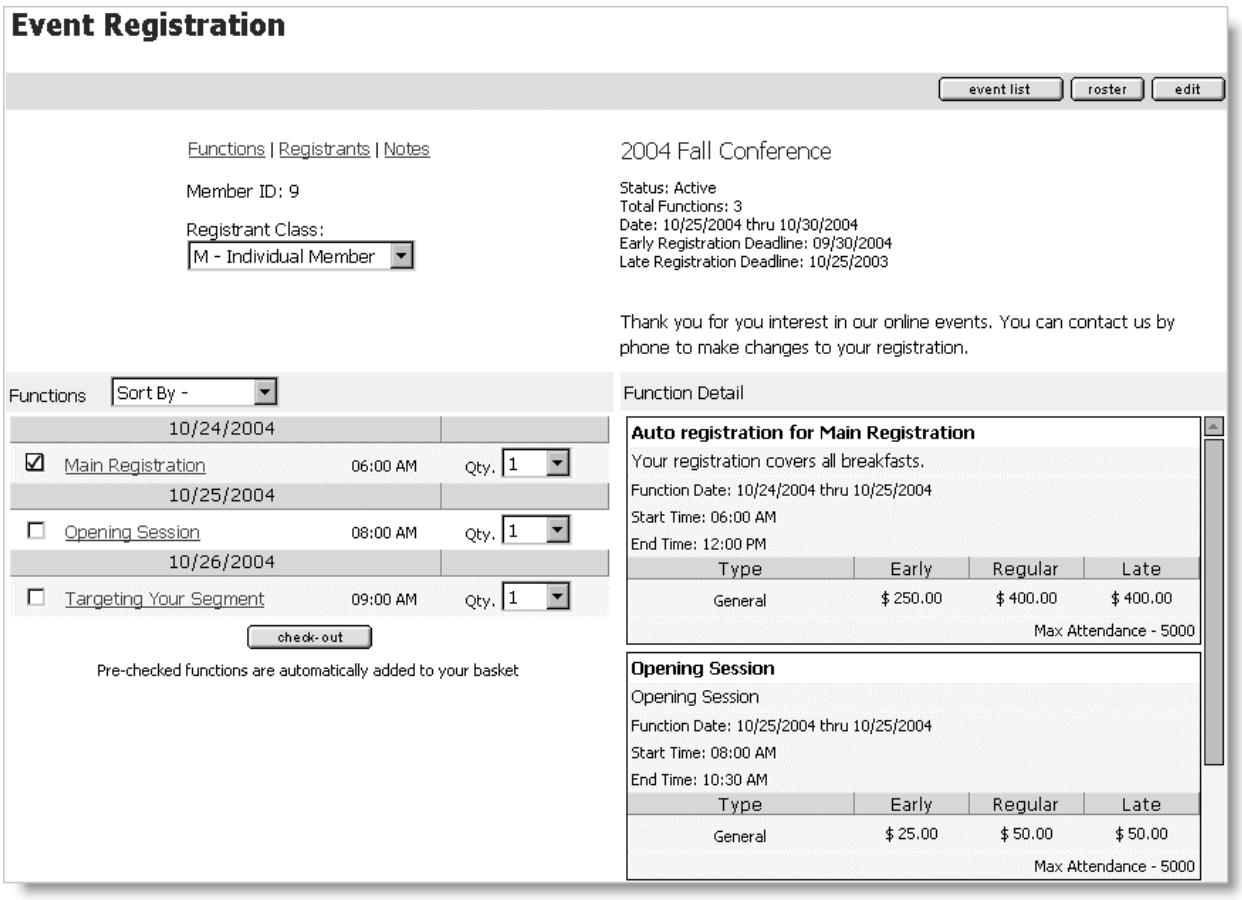
1. Log in to the e-Series site.
2. Select Events in the top navigation bar to display the Event Search page.
3. Enter the search criteria.
4. Click search. The Available Events page displays the search results.

5. Select the event to open the Event Registration page and view the event and event function details.



Event Search page

Available Events page



Event Registration page

Registering for an Event

After you set up an event, you can begin accepting registrations. Two email messages are sent when an event registration is received in e-Events: one to the staff person responsible for entering event registrations and another to the customer registering for the event.

To register for an event

1. Log in to the e-Series site.
2. Select an event to open the Event Registration page.
3. Enter your registrant information (depending on the settings in the e-Events System Parameters, these steps may not be required):

- Enter a Member ID. (If entering event registrations for other company members, select all registrants from the Member drop-down list.
- Select a Registrant Class.

4. Register for all applicable event Functions (depending on the settings in iMIS Events, these steps may not be required):

- Enable the appropriate checkbox for each event Function to be attended (required functions cannot be deselected).
- For each selected Function, select the registration Qty being purchased. (If the function is limited to one registration, the Qty field does not display. If the function is limited to a specific number of registrations, only that number of registrations can be purchased.)

5. Click check-out to display one of the following:

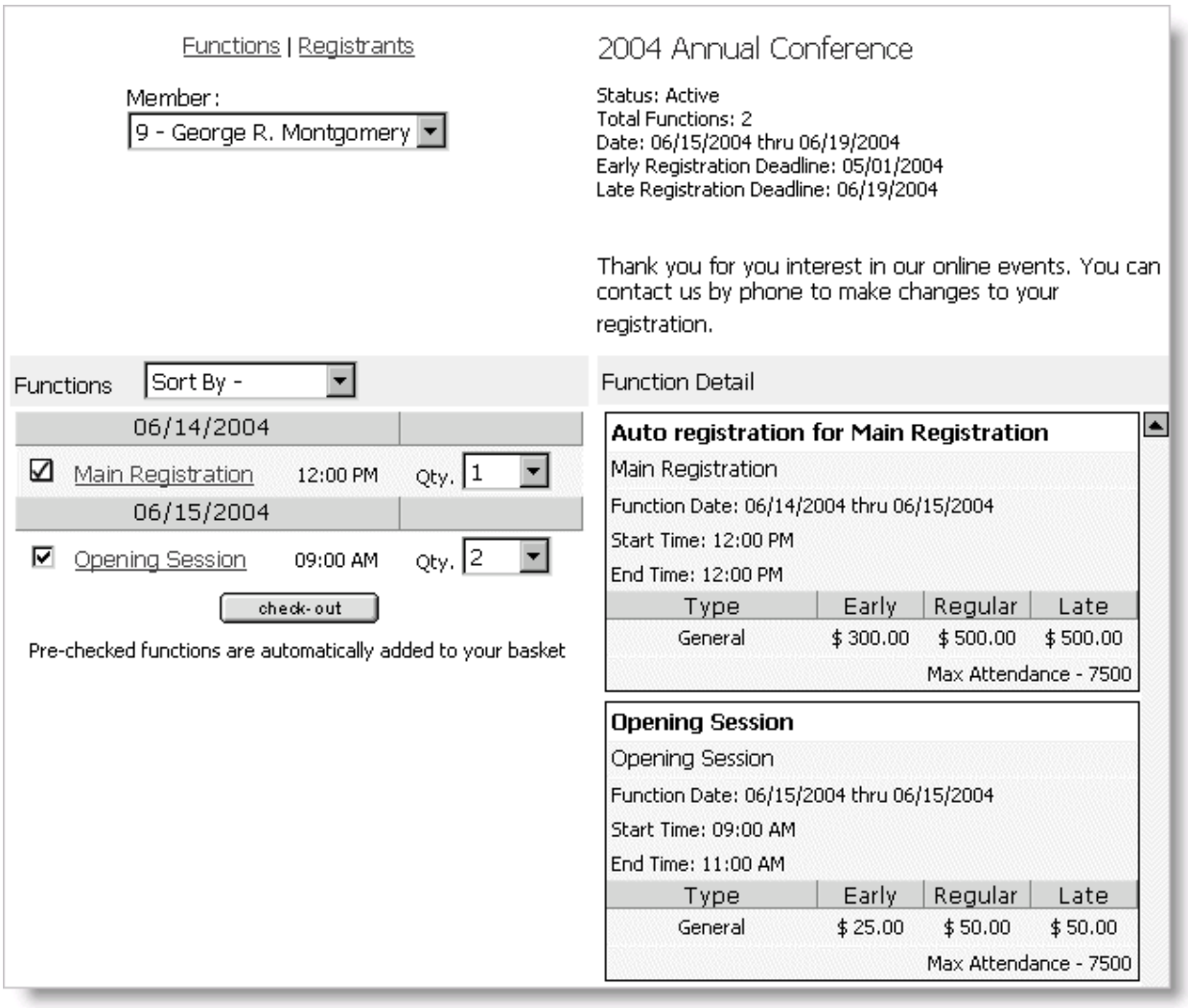
- The Badge Maintenance page. (Displays only if Include Badges in Check Out is enabled in the e-Events System Parameters.)
- The Check-Out Basket page.

6. Verify the accuracy of the information on the Check-Out Basket page, and edit or delete as necessary:

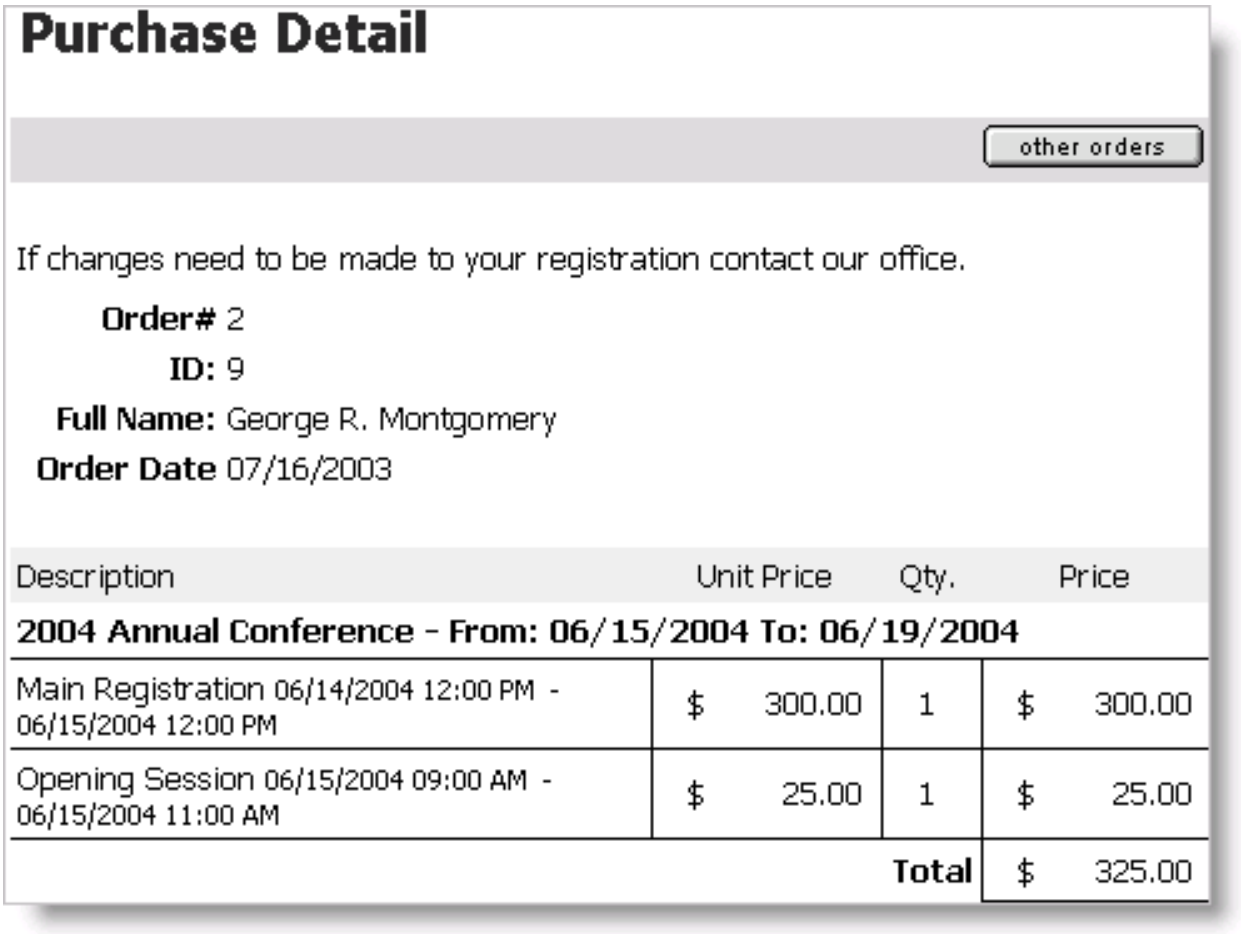
- Select Badge Maintenance (if displayed) to enter or edit badge information before checking out.
- Select Your Events to return to the Event Registration page and make any necessary changes.
- Select Add Purchase Comments to display the Purchase Comments field and submit comments.

7. (required) Enter the correct Credit Card Information. You must fill out all of the fields.
8. Click check-out. The Purchase Detail page displays.

   After registering for an event, the system automatically e-mails a purchase confirmation containing billing and order information to the customer and a transaction confirmation that contains event, billing, and order information to the appropriate staff person.



Function Detail page

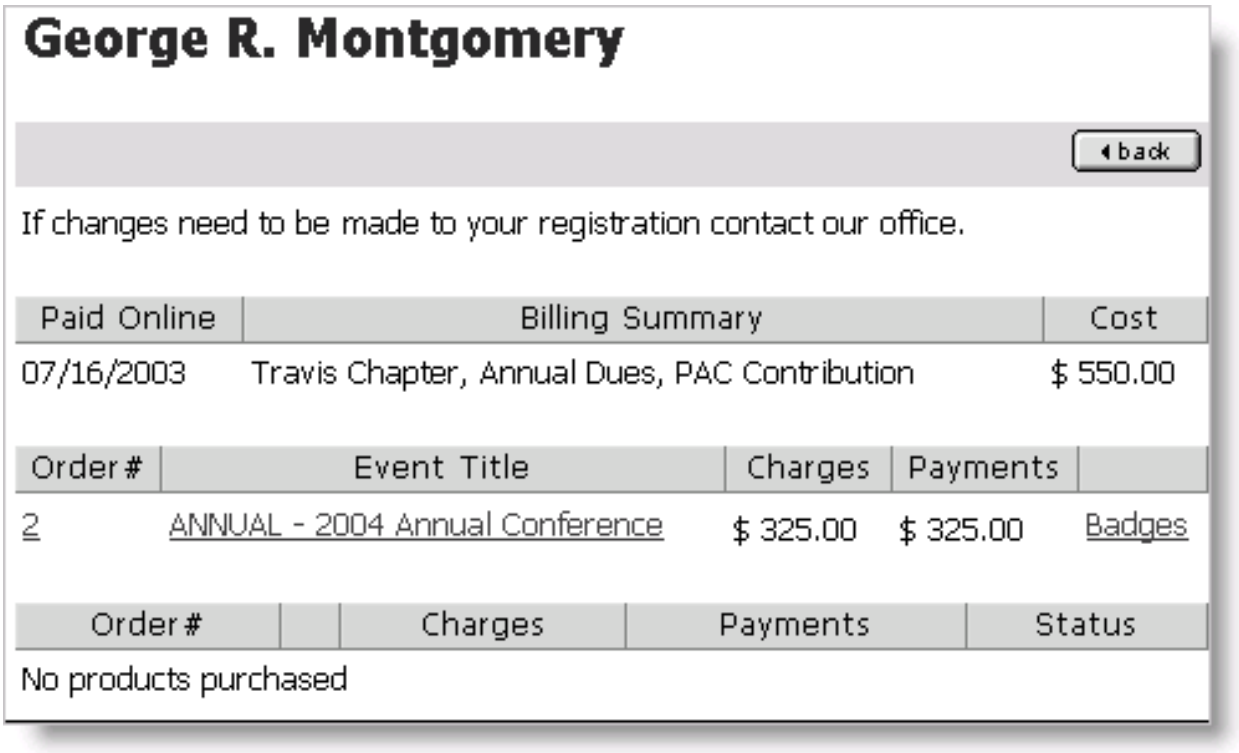


Purchase Detail page

To view event order activities

The Events and Orders page displays your event order activities. All of the events you have registered for are displayed on this page.

1. Log in to your e-Series site.
2. Select your record in the side index to display your profile page.
3. Click events & orders to open the Events and Orders page and display all of your event order activities.
4. (optional) Select an event title to open the Event Registration page and view the event and event function details, or select the order number to open the Purchase Detail page.
5. (optional) Select the Badges link to open the Badge Maintenance page.



George R. Montgomery

back

If changes need to be made to your registration contact our office.

Paid Online	Billing Summary	Cost
07/16/2003	Travis Chapter, Annual Dues, PAC Contribution	$ 550.00

Order #	Event Title	Charges	Payments	
2	ANNUAL - 2004 Annual Conference	$ 325.00	$ 325.00	Badges

Order #		Charges	Payments	Status
No products purchased				

Event Scheduled - Technology Expo

back email members

Reg#	Name Company:	Contact By
12.0	Charles E. Cox *American Business Services*	(w) (713) 897-5600 (e)
15.0	John Doe *Pecan Street, Inc.*	(w) (512) 576-2345 (e)
16.0	Marcie L. Farmhaven, CPA *Prodigy Makers International*	(w) (201) 898-9000 (e)
18.0	James H. Harrison, Jr. *Prodigy Makers International*	(w) (201) 898-9000 (e)

Events and Orders page

Entering Event Registrations for Other Company Members

Non-anonymous users who are company members can enter event registrations for other company members that have active records. For users to enter registrations for fellow company employees, the Select option must be enabled under the e-Event Registration ID Field Type options in the e-Events System Parameters.

When Select is enabled, two options are presented.

- Continue using the currently logged in customer?
- Register a different customer?

If you are registering yourself for an event, choose the first option. The system will automatically register you using your login information. When the Event Registration page opens, you can then sign up for an event function and edit your registration information.

If you are registering someone else, choose the second option. When the Event Registration page opens, you can then register someone else up for an event using an ID number, enter relevant information, and sign them up for an event function.

Viewing Event Rosters

If the Meetings Roster security filter is enabled for non-Administrative security groups, users can view event rosters that list all of the registrants for an event.

To view an event roster in e-Series

1. Log in to your e-Series site.
2. Select Events in the top navigation bar to display the Event Search page.
3. Select Events> Register in the side index to display the Available Events page.
4. Select an event to open the Event Registration page.
5. Click roster to open the Event Scheduled page and view all of event registrants.
6. (optional) If you want to e-mail a message to all of the event registrants on the roster, click email members to open the Send E-mail to Roster page.

- Enter a Title for the e-mail.
- Enter the Subject text of the e-mail.
- Click send.

Event Scheduled page

Entering and Editing Badge Information

When Include Badges in Check Out is enabled in the e-Events System Parameters (and the Insert and Edit Meeting Badges security filters are enabled), registrants can view, enter, and edit badge information. Event registrants can enter badge information before or after checking out, and they can add badges for guests.

When Include Badges in Check Out is disabled, registrants are unable to view or edit badge information for any event. Badges links are hidden from view on all applicable pages (including the Events and Orders page), and registrants cannot access the Badge Maintenance page at any stage of the event registration process.

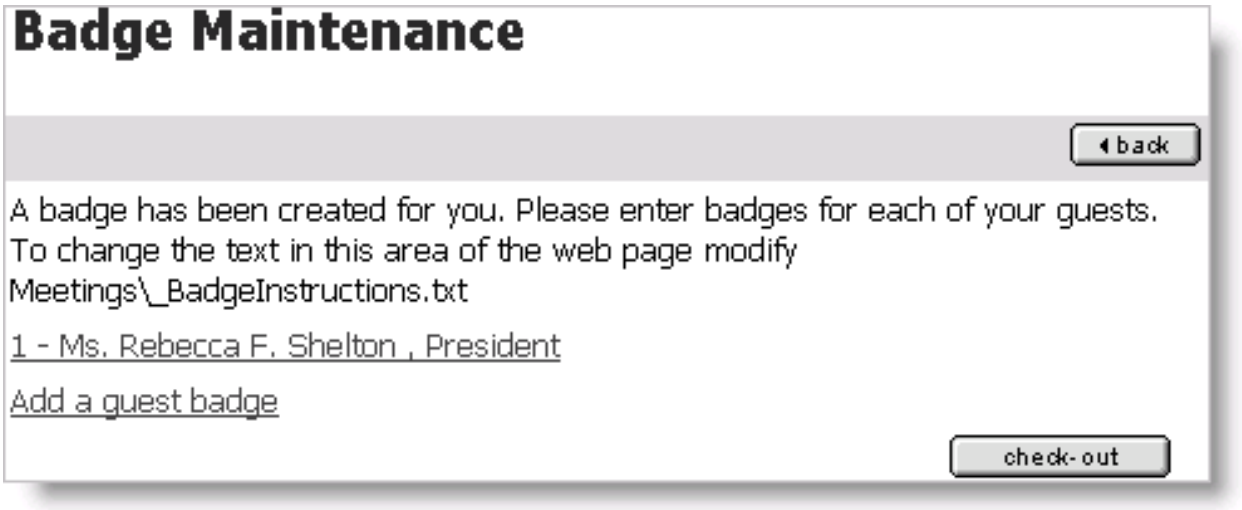
Note: Text that displays on the Badge Maintenance page can be customized through the eEventsConfig.txt file found in the Module Config Files page (select Admin> Style Form, and select Edit Config Files).

To enter badge information before check out

1. Register for an event, and click check-out to display the initial instance of the Badge Maintenance page.
2. Select the link that is your name to display the second instance of the Badge Maintenance page.
3. Enter or edit your badge information.
4. Click continue to return to the initial instance of the Badge Maintenance page.
5. (optional) Enter a guest's badge information:

- Select the Add a guest badge link to display the second instance of the Badge Maintenance page.
- Enter your guest's badge information.
- Click continue to return to the initial instance of the Badge Maintenance page. (The guest's name displays as a link to the second instance of the Badge Maintenance page.)

6. Click check-out to proceed to the Check-Out Basket page.



Badge Maintenance page

To enter, edit, or delete badge information after check out

1. Open the Events and Orders page:
   - Open the registrant's Profile page from the side index.
   - Click events & orders.
2. Select an event's Badges link to open the Badge Maintenance page.
3. Select the registrant's name to display the second instance of the Badge Maintenance page.
4. Enter, edit, or delete the badge information.
5. Click continue to return to the initial instance of the Badge Maintenance page.
6. (optional) Enter a guest's badge information:
   - Select the Add a guest badge link to display the second instance of the Badge Maintenance page.
   - Enter the guest's badge information.
   - Click continue to return to the initial instance of the Badge Maintenance page. (The guest's name displays as a link to the second instance of the Badge Maintenance page.)

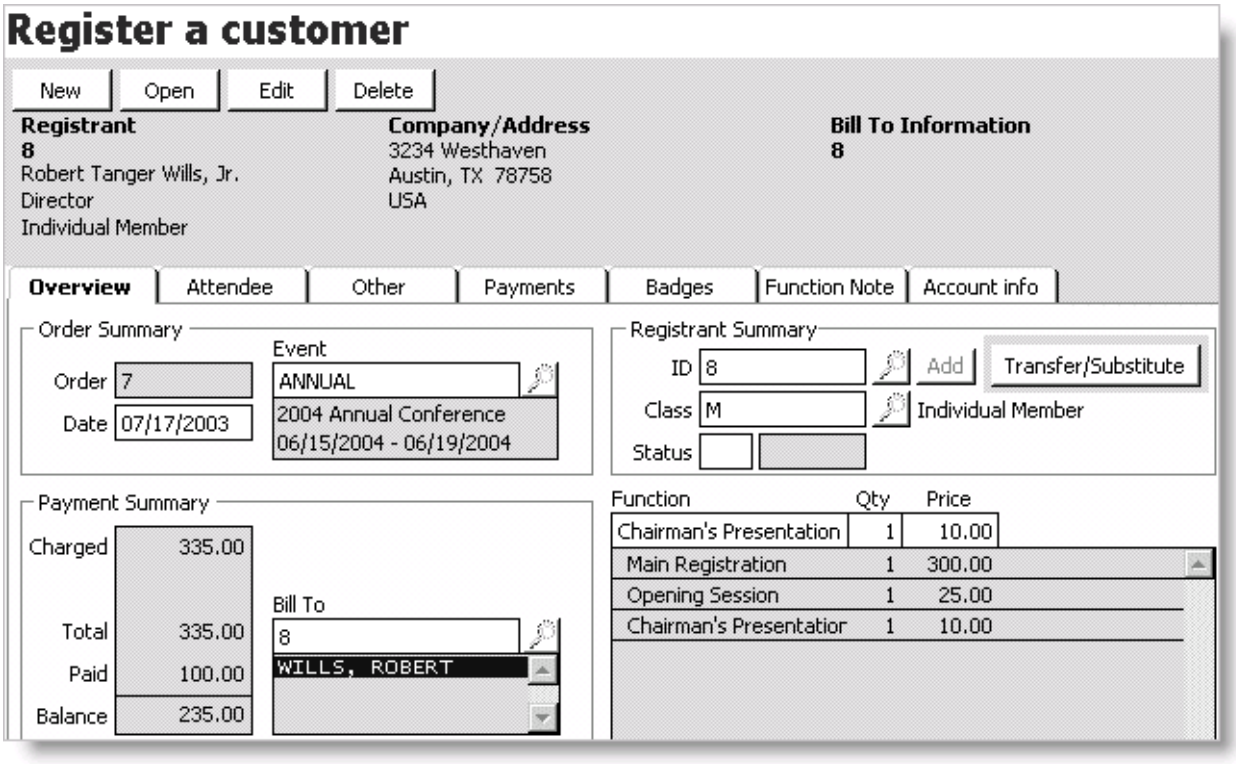
7. Click check-out to return to the Events and Orders page.

Viewing e-Events Registration and Payment Information in iMIS

After registering for an event, event registration and payment information is viewable in iMIS.

To view an eEvent registration in iMIS

1. From Events, select Register a customer to open the Register a customer window. The Overview tab displays by default.
2. Click Open, and enter the Event code.
3. Enter the registrant's ID. The event registration displays.



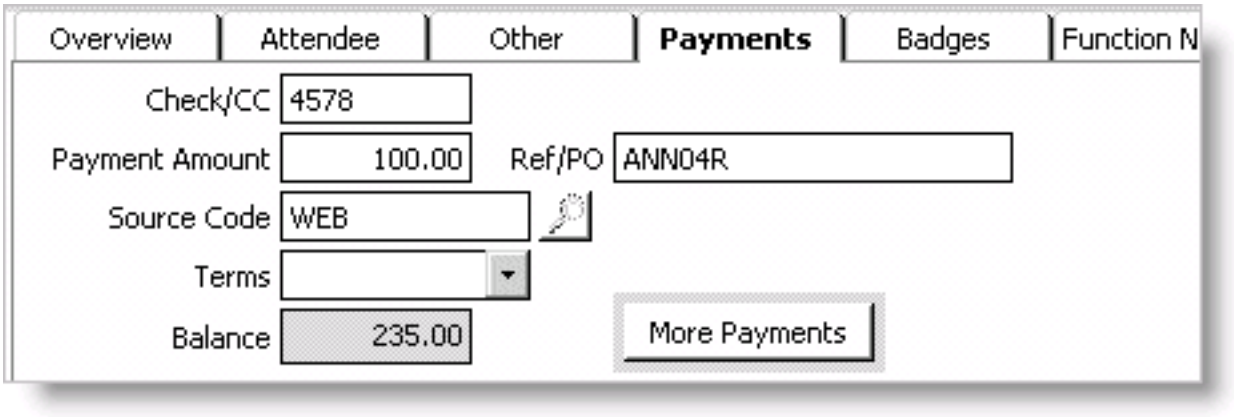
Register a customer page in iMIS

To view e-Event payment information in iMIS

1. Open the event registration. -

2. Select the Payments tab to view the registration payment information.
3. Click Print, and select Confirmation from the drop-down list to print a confirmation notice.

   Note: You must edit and cancel event registrations in Events. You cannot edit or cancel event registrations in e-Events. Refer to iMIS Events for more.



Payments tab in iMIS

Delayed Login for e-Events

The Sign Up and Log In links on the Event Registration page allow a customer or guest to select an event, enter their sign-up or login information, and return directly to the event to complete their registration or make a payment. The guest user can select an event to view from the event list or click a link to go directly to the event.

Guest users cannot register for events until they have logged in from the Sign Up link on the Event Registration page. When the guest user signs up, their record is added to the iMIS database and a new customer type is created for them based on the value set in the Member Type used for Anonymous Sign Up field (Admin> Lookups> System Parameters> e-Customer). The user then is returned to the Event Registration page where they can register for events.

Existing customers also can access and view e-Events without logging in. However, customers cannot register for events until they have logged in from the Log In link on the Event Registration page. Once the customer logs in, they are returned to the Event Registration page where they can register for events.

Financial Aspects of e-Events

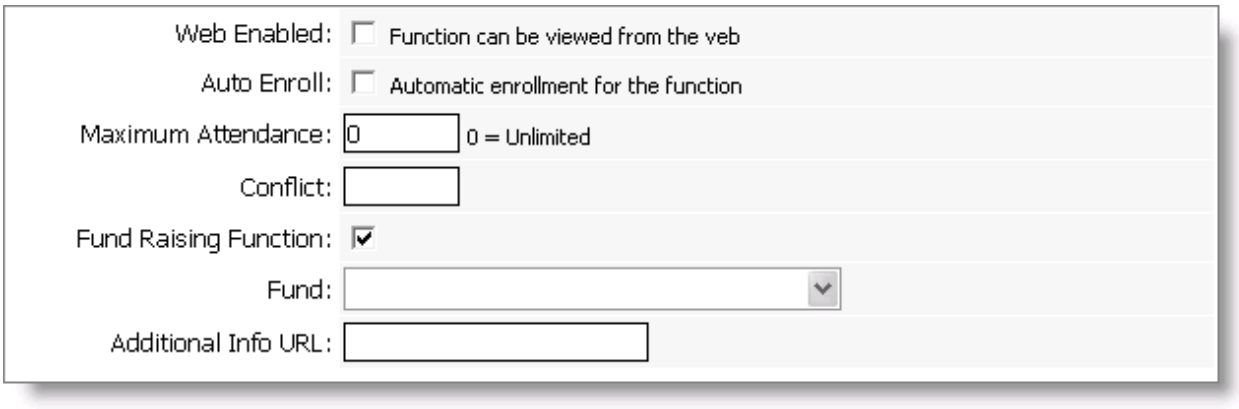
Consider the following when accepting e-Events registrations:

- Payment in full is required at the time of the event registration.
- Only credit card payments are accepted when registering for an event online.
- When a user registers for an event over the Web, a batch is created automatically. The batch is designated by an “I” at the end of the batch number to indicate that it was created over the Internet.
- Invoice lines are not created until batches are posted.

Fundraising for e-Events

To create a Fundraising Function in e-Series

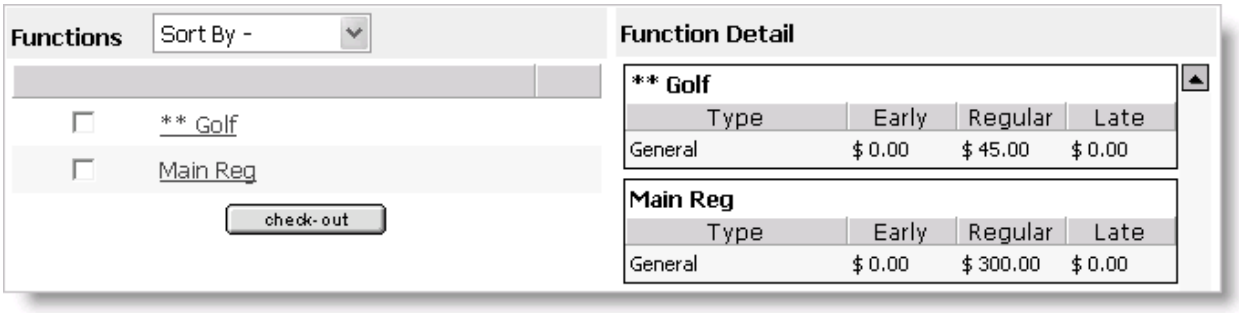
1. In the Events module, navigate to the Available Events window.
2. To add a function, click on the event name in the list. The Event Registration window appears.
3. Click Edit. The Edit Event window appears.
4. Click the Functions & Pricing. The Event Function List window appears.
5. Click Insert Function. The Insert Event Function window appears.
6. Enter the specifics of your function.
7. Click the Fundraising Function checkbox.
8. Select a Fund from the drop-down list.
9. Click Submit.



Fundraising Function in e-Series

Identifying a Fundraising function in e-Series

You can identify a Fundraising function on the Event Registration window by the double asterisks (**) next to the title of the function.



Fundraising function in e-Series

Using e-Orders

e-Orders Overview

e-Orders is the Web extension of the iMIS Orders module and includes advanced features that allow customers to order and pay for products over the Internet. e-Orders is similar to iMIS Orders with the following exceptions:

- All e-Orders purchases must be made with a credit card and are treated as prepaid transactions
- e-Orders are entered as pro-forma (quote) orders

For authorizing credit card purchases, e-Orders uses PayPal, a third-party credit card validation vendor. Administrators can enable or disable it (the default is disabled). If you elect not to use the vendor, orders entered in e-Orders bypass the connection and forward the transaction to the iMIS Orders module.

Administrators also can enable e-Orders for anonymous user access so that only a mailing address and credit card information are required for purchases. To use e-Orders, you must be licensed for both e-Orders and the iMIS Orders module.

The goal of this section is to give you the knowledge and skills necessary to set up and use the e-Orders module.

After completing this section, you will be able to do the following:

- Purchase products over the Web
- Describe the financial aspects of using e-Orders

Entering Orders

All orders entered using e-Orders are entered as pro-forma orders. They are created as quotes and converted to regular orders after verification.

e-Orders payments are entered as prepaid cash and must be paid using a credit card. iMIS uses PayPal to authorize and validate credit card payments. When a product is purchased through e-Orders, a batch is created automatically.

When converting a pro-forma order or quote to a regular order, you must identify the batch. Complete the order invoicing process, and then post the e-Orders batch.

To purchase products online

1. Select Orders from the top navigation bar to open the e-Orders page (a list of Featured Products displays by default).
2. Make a selection from the list of Departments to display the products page, which lists all of the products belonging to that department.

3. Select a product's title to open the product detail page, and enter any required Additional Information about the product.
4. Select add to your products to go to your products page.
5. Enter the product Qty being purchased, and click update qty (click remove all to empty the Qty field).

   Verify the order information on your products page, and make any necessary changes:

- To remove the product from the order and return to the e-Orders page, click remove next to the product.
- To add additional products to the order, click keep shopping.

6. Click select freight to display the select freight page, and enter all applicable shipping information.

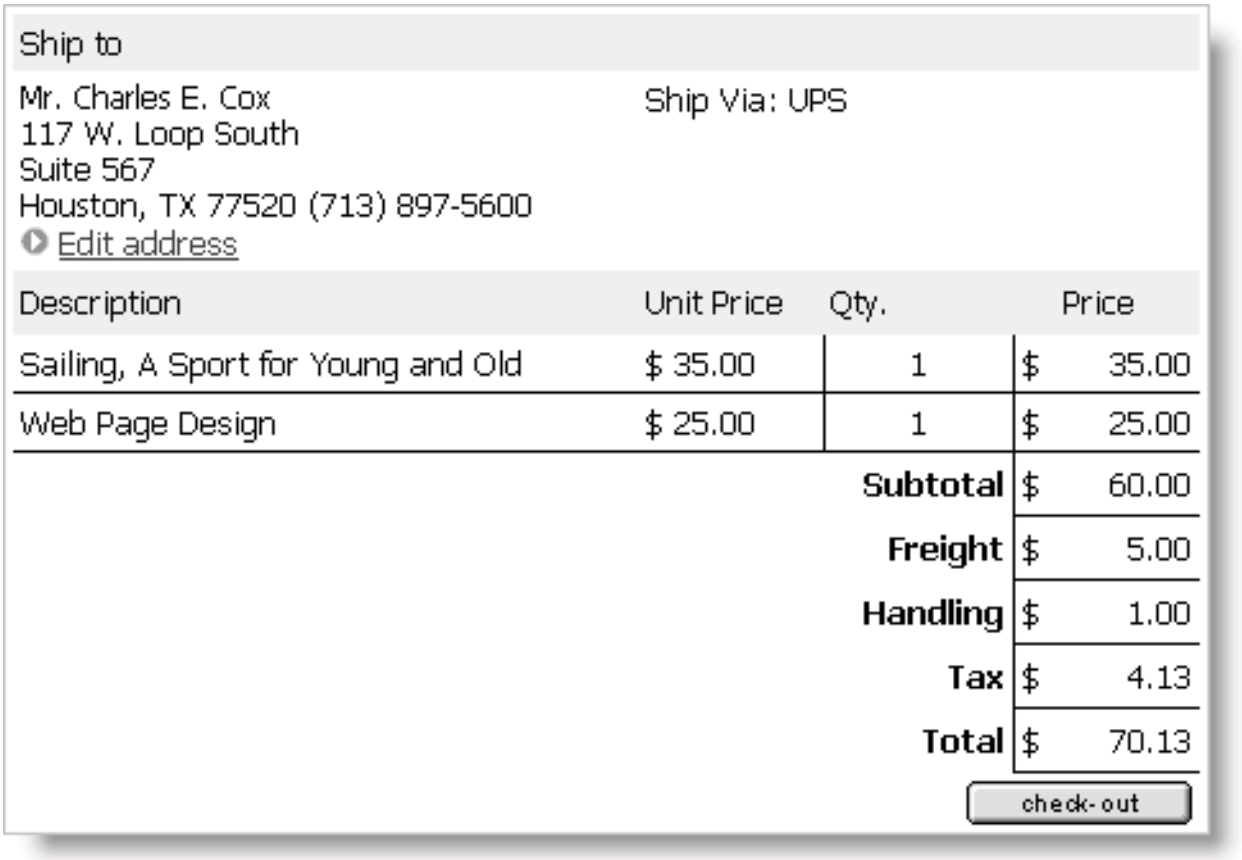
   (If you are not logged in, you will be asked to log in or create a new account. You can indicate interest in becoming a member of the organization by enabling Contact me about becoming a member of your organization. Click sign on or new account to display the Shipping Address page:

- Enter the shipping address information. Asterisks designate required fields. State and ZIP Code information is not required if the address is international. The e-mail address is required.
- If you are logged in (or after completing the previous step), the Select Freight page displays.)

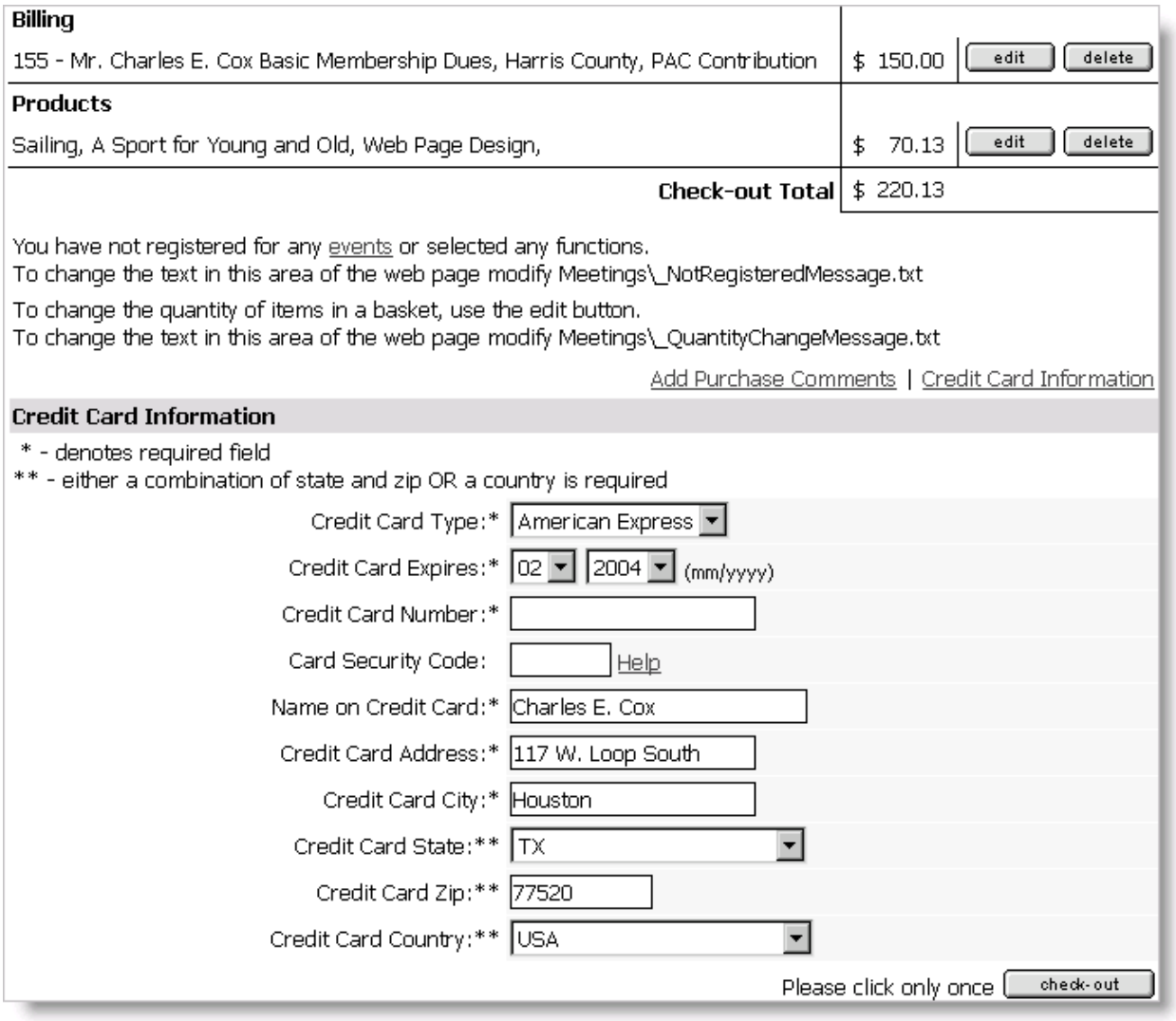
7. Click products total to display the Products Total page.
8. Click check-out to display the Check-Out Basket page, and enter the credit card information (click edit or delete to make any necessary changes to the order before checking out).
9. Click check-out to process the order and display the Purchase Detail page:

- You will receive an order confirmation by email containing detailed order information.
- If you also registered for an event, an transaction confirmation email containing event, billing, and order information is sent to the organization.

your products page



Products Total page



Check-Out Basket page

To view order activities

1. Log in to your e-Series site.
2. Select your record in the side index to display your profile page.
3. Click events & orders to open the Events and Orders page and display all of your order activities.
4. Select an order number to open the Purchase Detail page and view the order information.

Order#		Charges	Payments	Status
99	ORDER - Product purchase	$ 345.00	$ 345.00	Processing
98	ORDER - Product purchase	$ 265.00	$ 265.00	Processing
97	ORDER - Product purchase	$ 45.00	$ 45.00	Processing
85	ORDER - Product purchase	$ 255.00	$ 255.00	Processing
83	ORDER - Product purchase	$ 265.00	$ 265.00	Processing
82	ORDER - Product purchase	$ 125.00	$ 125.00	Processing
81	ORDER - Product purchase	$ 40.00	$ 40.00	Processing
5	ORDER - Product purchase	$ 39.00	$ 0.00	Shipped
4	ORDER - Product purchase	$ 78.00	$ 0.00	Shipped

Events and Orders page

Order# 81
ID: 101
Full Name: Douglas A. Hunt, Jr.
Order Date 09/20/2001

Description	Unit Price	Qty.		Price
Products				
Shipping Envelopes	$ 30.00	1	$	30.00
		Freight	$	10.00
		Total	$	40.00

Purchase Detail page

When a web user navigates to the Orders page to place an e-order, the Ship To address will default to the Preferred Shipping Address. Web users can specify another preferred shipping address when performing online updates of their user profile. The Ship To

address will then default to the address that the web user indicated as his preferred shipping address.

Figure 1: Using a preferred shipping address

Related and affected topics:

Manage customers window - Address section

To purchase products online

Financial Aspects of e-Orders

Consider the following when using e-Orders:

- Payment in full is required at the time of a purchase.
- Payments must be made by credit card.
- Items purchased through e-Orders are treated as prepaid transactions.
- You must enable batch control for e-Orders.
- New batches are created automatically and are designated by an “I” at the end of the batch number. A new batch is not created if an existing batch is open.
- Invoice lines are not created until a batch is posted.
- Orders are entered in iMIS as pro-forma orders.

- Anonymous users can purchase products through e-Orders.
- The Batch-per-Meeting-per-Day functionality is not compatible with e-Orders. The use of a single checkout basket for several modules conflicts with the use of the Batch-per-Meeting-per-Day option. Therefore, all items purchased within a unified basket must be processed as one batch.

Using e-Communities

Overview of e-Communities

The e-Communities module of e-Series is an area where customers and visitors with similar interests can do the following:

- Subscribe to communities
- Browse topics of common interest
- Set global and community level email preferences
- Mark items as read
- View new and archived community news items
- Create and participate in discussions
- Contribute and download shared documents

The facilities available to users of these communities are identical regardless of community type. However, certain communities are open to the public while others may be available only to customers and dues paying members of an organization. Both customers and members of the general public must be logged in to “subscribe” to specific communities. Subscribing to a community allows you access to different community levels and provides you with a dynamic personal home page.

The goal of this section is to give you the knowledge and skills necessary to use the e-Communities module.

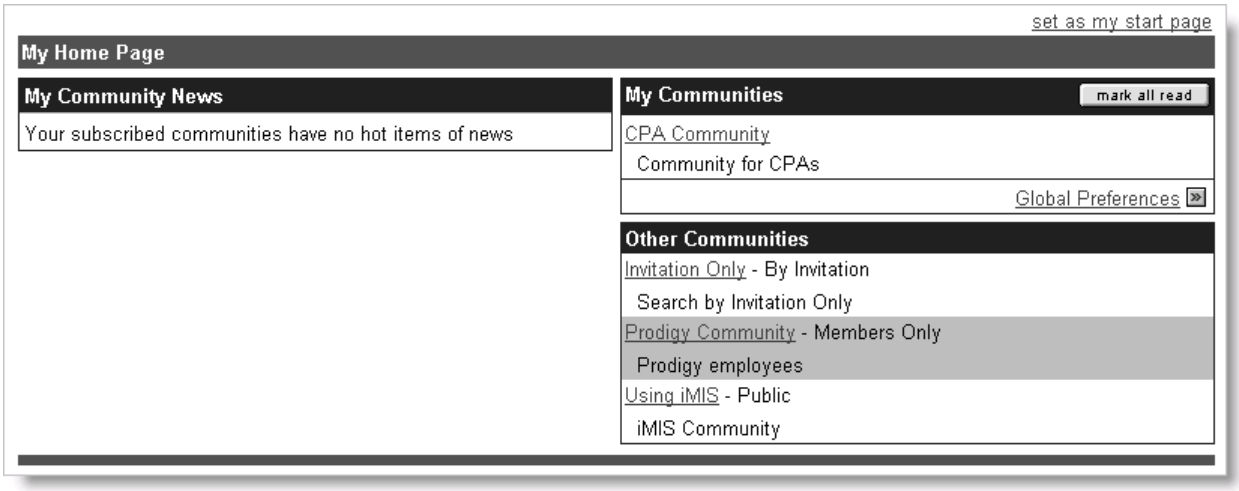
After completing this section, you will be able to do the following:

- Configure your Community home page
- Search communities
- View Community news items
- Participate in discussions
- View documents

Configuring “My Communities” Home Page

The User Home Page represents the user's dynamic personal home page and displays links to the user's subscribed communities and community news items. Links to the communities the user is subscribed to are listed in the My Communities area. Hot news items from the user's subscribed communities are listed under My Community News. Links to communities the user may be interested in joining are listed under Other Communities.

My Home Page



Communities

set as my start page

Select to set your User Home Page as the default start page on login. If your User Home Page is set as the default start page, the link remove from being my start page displays and deselects your User Home Page as the default start page.

Note: The set as my start page option is not available for combined e-Series/Content Manager sites. This option is applicable to e-Series alone.

My Community News

Lists the news documents associated with a particular community. Only 'HOT' news items are displayed in this section. They are displayed in time order with the most recent first.

A maximum of five news items are displayed. If more than five are available, a line displays the number of items that are not visible, and a link displays to allow the user to view all of the items. If the user selects this link, the page is redrawn with all available items displayed.

A New graphic will display to the right of the news item title in the My Community News section if the item has been posted since the last time the user has marked news items as read.

My Communities

Lists the user's subscribed communities in alphabetical order

A maximum of five subscribed communities is displayed. If more than five are available, a line displays the number of items that are not visible, and a link displays to allow the user to view all of the items. If the user selects this link, the page is redrawn with all available items displayed.

In the My Communities section, a New graphic and the number of new posts will display to the right of each community name if there are new items available in the community.

mark all read

Click to mark all news items, discussion posts, and uploaded files as read for all of the user's subscribed communities. Items in unsubscribed communities will not be marked as read.

Global Preferences

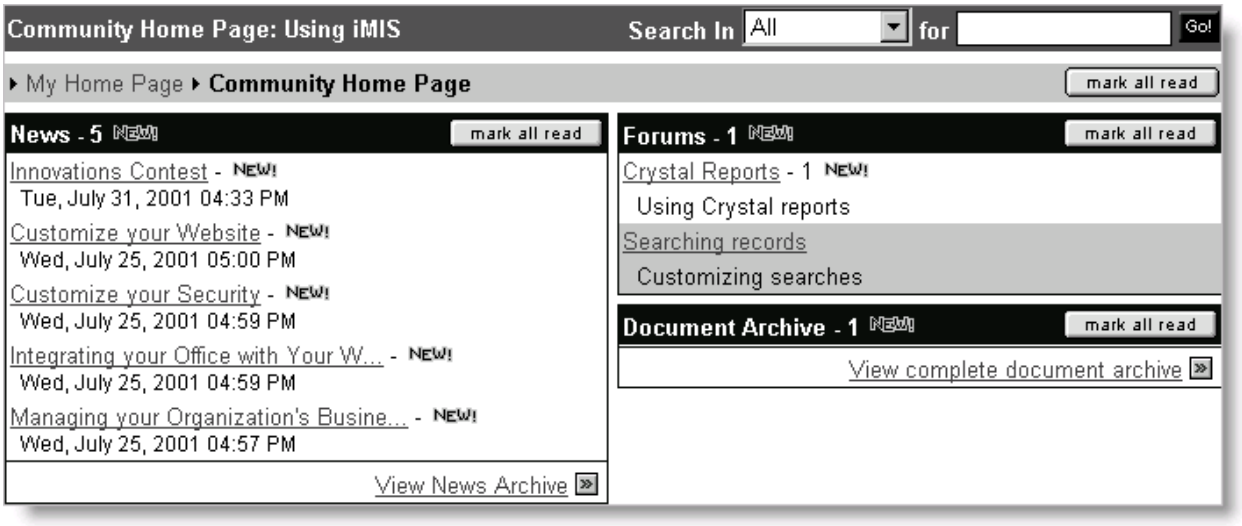
Select to open the Global Preferences page.

Other Communities

This area displays non-subscribed communities. Invitation only communities are listed first followed by the remaining communities in alphabetical order.

Community Home Page

The Community Home Page is the home page for a particular community. Each community has its own page that includes a list of community news items, a list of discussion forums, and an area from where you can access community documents.



Communities> My Communities

set as my start page

Select to set your User Home Page as the default start page on log in. If your User Home Page is set as the default start page, the link remove from being my start page displays and deselects your User Home Page as the default start page.

Note: The set as my start page option is not available for combined e-Series/Content Manager sites. This option is applicable to e-Series alone.

Search In

Select an area of a community in which to search from the drop-down list. Options include All, Discussions, News, and Shared.

for

Enter the topic or item for which you are searching.

Go

Click to execute your search.

mark all read

Click to mark all news items, discussion posts, and shared documents as read for the specific community.

News

Lists the news documents the community administrator has posted for the given community. News items are sorted primarily by priority (hot, normal) and secondarily by date. Both hot and normal priority news items are listed. Hot news items are designated by a HOT graphic displayed to the left of the news item title.

A New graphic will display to the right of the news item title in the My Community News section if the item has been posted since the last time the user has marked news items as read.

A maximum of five news items will be displayed. If more than five news items are available, a line displays the number of items that are not visible, and the View All Current News Items link displays to allow the user to view all of the items. If the user selects the View All Current News Items link, the page is redrawn with all of the current news items displayed.

mark all read

Click to mark all news items as read for the specific community.

View News Archive

Click to view all archived news items. Only news items with a status of Archived are displayed. Archived news items are sorted in date order.

Forums

Lists the discussion forums created and maintained by the community administrator for the given community. Discussion forums are associated with a particular community and cannot be shared between multiple communities. Administrators can add, edit, and remove discussion forums, topics, and items. Community members may start a new discussion topic within a discussion forum or post documents to an existing discussion topic.

The number of new discussion posts and the New graphic display to the right of the forum section caption if items have been posted since the last time the user marked discussion posts as read. For each forum, the number of new discussion posts and the New graphic display to the right of each forum title for items that have been posted since being marked as read.

Discussion forums are listed in alphabetical order, and a maximum of five forums are displayed. If more than five forums are available, a line displays the number of items that are not visible, and a link displays to allow the user to view all of the forums.

mark all read

Click to mark all discussion posts as read for the specific community.

Document Archive

Lists the shared documents posted by members that are specific to the given community. Community members may post any document to a public area (specific to the community) if the community is set up to allow documents to be updated. Community members can browse and download documents from this area. Administrators maintain the document archive area (create a hierarchical file structure and add or remove documents).

A maximum of five hot documents are displayed. If more than five hot documents are available, a line will display the number of documents that are not visible. The user must click View complete document archive to view other documents.

mark all read

Click to mark all shared documents as read for the specific community.

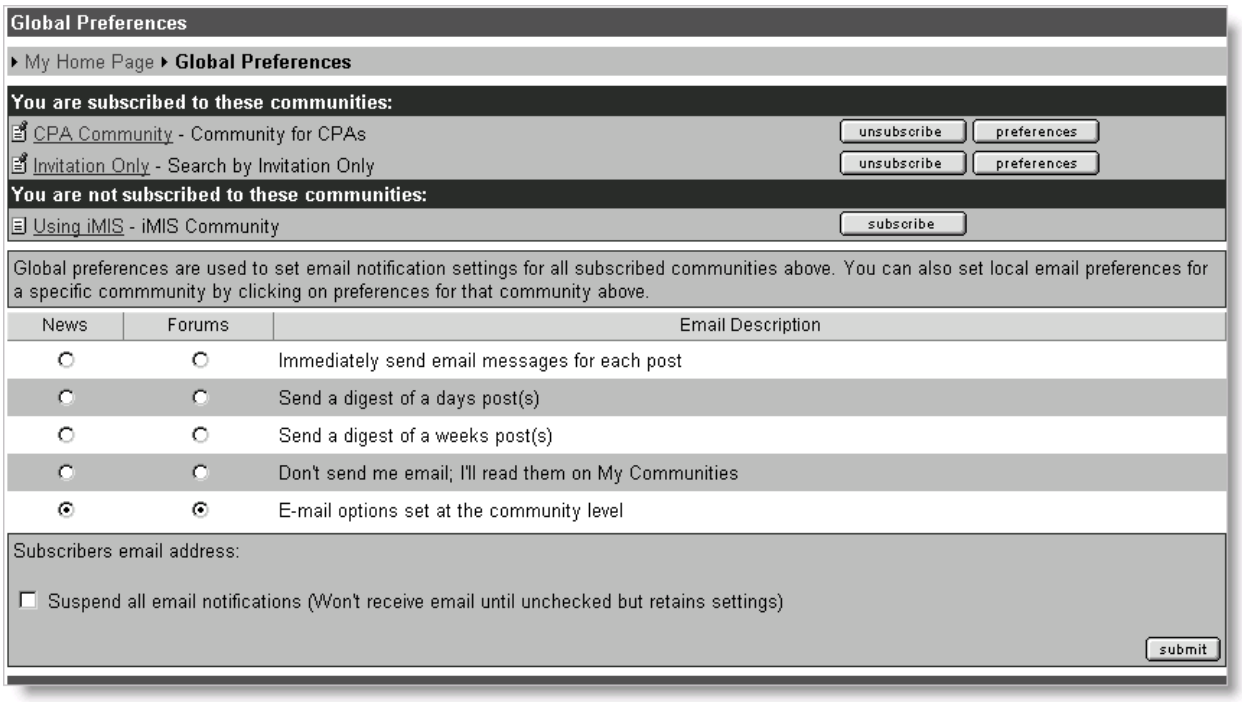
View complete document archive

Click to view all archived documents.

Global Preferences page

Users have the ability to customize their home page through the Global Preferences link. Clicking this link opens the Global Preferences page where users can subscribe and unsubscribe to communities as well as change their email settings.

The Global Preferences page displays links to the communities the user is subscribed to and links to the communities to which the user has permission to subscribe. Links to communities that the user does not have permission to subscribe to are not displayed. Users that are members of the Administrators security group will have access to all communities regardless of whether the community criteria is Public, Members Only, or By Invitation.



Communities> Global Preferences

You are subscribed to these communities

Lists the communities in alphabetical order to which the user is subscribed.

unsubscribe

Used to unsubscribe from the given community and move the community to the appropriate section.

preferences

Opens the Community Preferences page and set community level email preferences.

You are not subscribed to these communities

Lists the communities, in alphabetical order, to which the user is not subscribed

subscribe

Used to subscribe to the given community and move the community to the appropriate section.

Immediately send email messages for each post

Select to send email for each new News and/or Forums posting.

Send a digest of a days post(s)

Select to send a daily email containing a digest of News and/or Forums posts.

Send a digest of a weeks post(s)

Select to send a weekly email containing a digest of News and/or Forums posts.

Don't send me email; I'll read them on My Communities

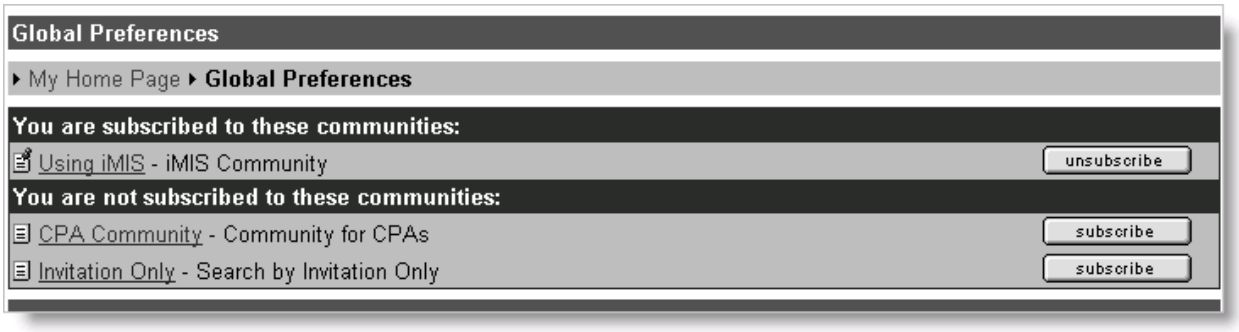
Select to send no email for News and/or Forums posts.

email options set at the community level

This option enables when preferences are set at the community level for the News and/or Forums posts.

Note: The email options set at the community level option is only included in the Global Preferences page when email settings are set at the community level for a given community.

If the administrator has configured e-Communities with email notifications disabled, then the Global Preferences page displays without any email options available:



Global Preferences page

To use Breadcrumb Navigation Aids

e-Communities uses Breadcrumb Navigation Aids. Breadcrumbs are visual indicators of the pages you have visited that function as hyperlinks. These hyperlinks allow you to navigate to any link (page) in the breadcrumb trail with only one click.

In the following example, the breadcrumb shows the path as My Home Page> Community Home Page> View Discussion Forum. The current page is shown in black text while the hyperlinks to the previous pages are shown in red. You can click any hyperlink to navigate to that page. For example, if you click Community Home Page, the Community Home Page opens.

In the following example, the breadcrumb shows the path as Admin Home> Manage Communities> Edit Community> Edit Community Properties. The current page is shown in black text while the hyperlinks to the previous pages are shown in red. You can click any hyperlink to navigate to that page. For example, if you click Manage Communities, the Manage Communities page opens.

To subscribe to a community

1. Select Communities to open your home page.
2. Click the Global Preferences link to open the Global Preferences page.
3. Click subscribe on the same line that corresponds to the community to which you want to subscribe. The community name automatically moves to the list of subscribed communities.

To unsubscribe from a community

1. Select Communities to open your home page.
2. Click the Global Preferences link to open the Global Preferences page.
3. Click unsubscribe on the same line that corresponds to the community to which you want to subscribe. The community name automatically moves to the list of unsubscribed communities.

To set global email preferences

The default setting for all email preferences is that no email will be sent to the user without the user setting their preferences at either the global or community level.

Note: Setting global preferences will overwrite any community level preferences previously set.

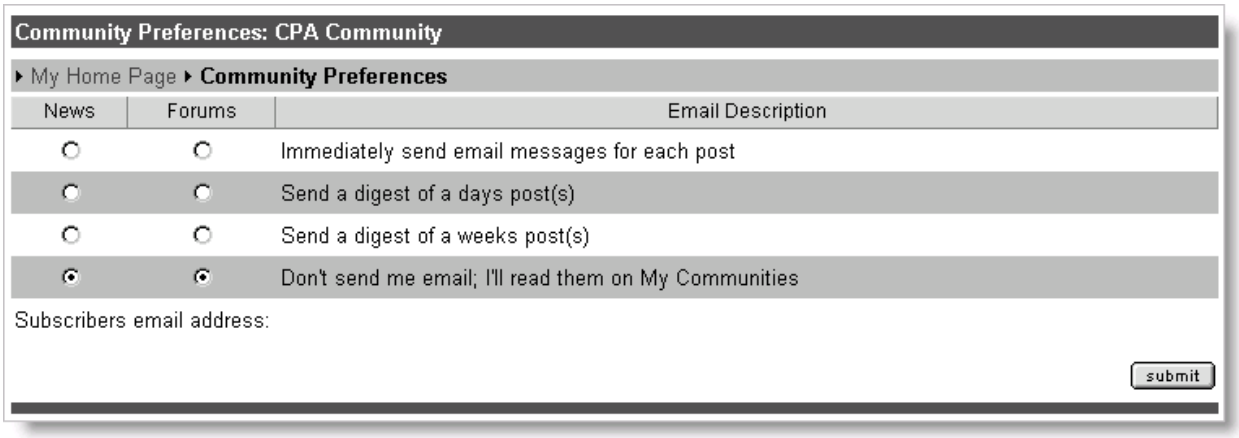
1. Select Communities to open your home page.
2. Click the Global Preferences link to open the Global Preferences page.
3. Enable the appropriate radio buttons for your Community News and/or Discussion Forums posts.
4. Click submit.
5. Click OK on the message box.

To set community level email preferences

The default setting for all email preferences is that no email will be sent to the user without the user setting their preferences at either the global or community level.

1. Select Communities to open your home page.
2. Click the Global Preferences link to open the Global Preferences page.
3. Click preferences on the same line that corresponds to the community for which you want to set community preferences. The Community Preferences page opens.
4. Enable the appropriate radio buttons for your Community News and/or Discussion Forums for the given community.
5. Click submit.
6. Click OK on the message box to update the Global Preferences page.

Note: Setting preferences at the community level modifies the Global Preferences page to include the E-mail options set at the community level option.



Global Preferences page

To mark items as read

Users have the option of marking news items, discussion posts, and uploaded files as read. The mark all read function can be applied to all of the user's communities, to individual communities, and to specific areas of a community.

1. Select Communities to open your home page.

2. To mark all items as read for all of the subscribed communities:

- Click mark all read.

3. To mark all items as read for all of the items in a specific community:

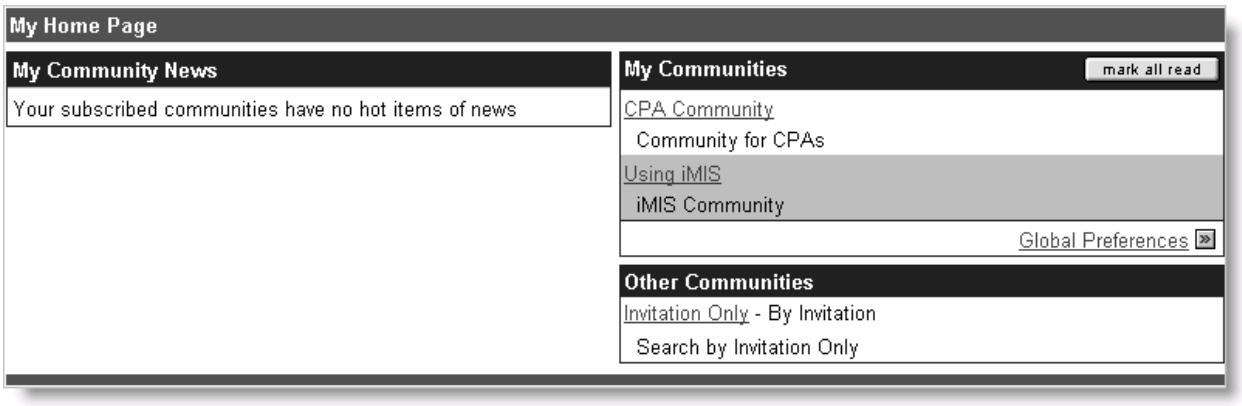
- Select the community from the My Communities area that you want to view and open the Community Home Page.
- Click mark all read to mark all items in the community as read.

4. To mark all items in specific areas of a community as read:

- Click mark all read in the area for which you want to mark all items as read. For example, if you want to mark all News items, click mark all read in the News area.

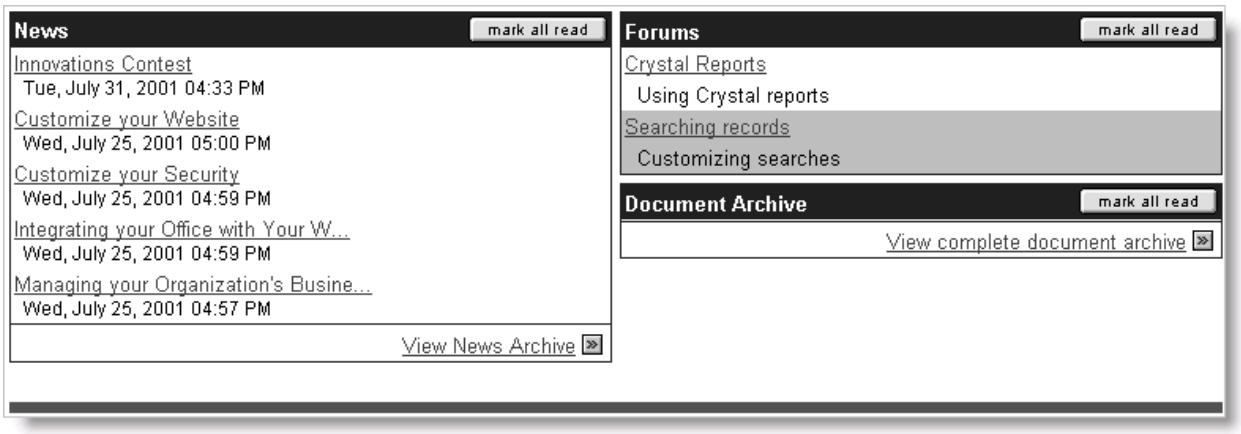
5. To mark a specific forum as read:

- Click the forum to open the View Discussion Forum page.
- Click mark all read to mark all items in the forum as read.

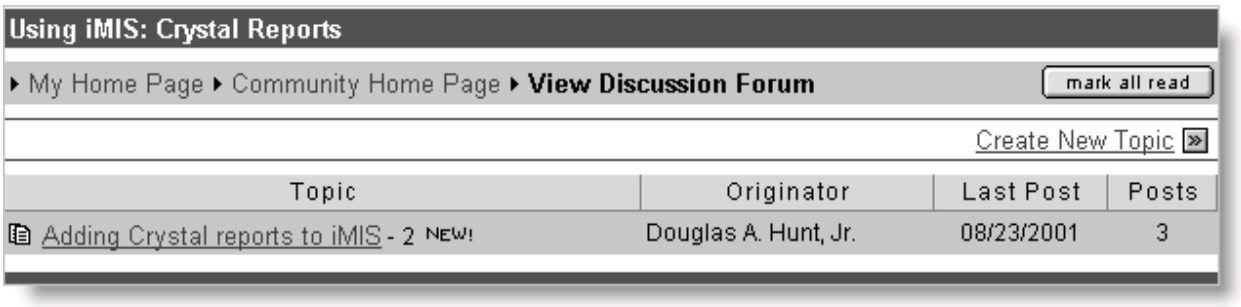


My Community News page

Communities Home page



News and Forums page



Using iMIS: Crystal Reports discussion forum

Searching e-Communities

The Verity Indexing and the Verity search engine are used for performing searches in e-Communities. Before e-Communities can be searched, Verity must first index data into a collection. Once Verity Indexing is set up and the Communities collection is created, community search fields become available for the Community Home Page. Users are then able to perform community level searches.

Users can search whatever communities they select provided those communities are accessible from their User Home Page. Anonymous users do not have the ability to perform searches. Users have the option to search an entire community or to narrow their focus and search specific community areas:

- News
- Forums

- Documents

  Note: The Verity search does not search on the Discussion Subject field or the News Title field, unless the <title></title> parameter is added to a news item when it is created. Only content, not titles, is searched.

  Note: Content returned from a Discussion or News item will not reference a document title, unless the <title></title> parameter is added to a news item when it is created. The reference will be No document title found.

  To search the Community Home Page

  Community search fields become available in the Community Home Page only after the Verity Indexing is set. Users can then perform community level searches.

1. Log in to the e-Series site.
2. Select Communities to open the My Home Page.
3. Click an item or area that you want to search to open the Community Home Page and access the community search fields. For example, click Using iMIS under My Communities.
4. Select an area in the Search In drop-down list that you want to search. For example, select News. Search options include:

- All - Searches all areas of the community
- Discussions - Searches only items in the Forums area
- News - Searches only items in the News area
- Shared - Searches only items in the Document Archive area

5. Enter the content to be searched in the for field. For example, enter security.
6. Click Go to open the Search Results page and view the returned results.
7. Select a returned item(s) and view the returned content.

Viewing Community News Items

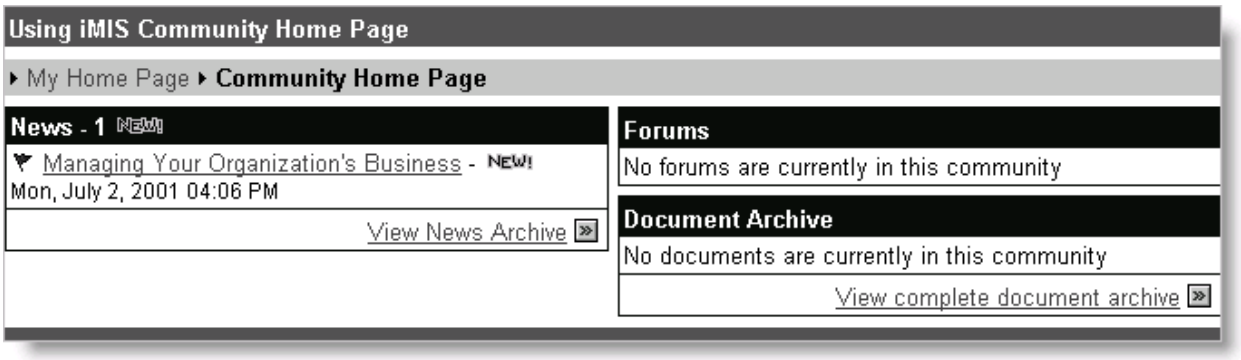
Community news items are the news documents associated with your particular community. Only 'HOT' news items are displayed on your Community Home Page, and they are displayed in time order with the most recent news item listed first.

A maximum of five news items are displayed. If more than five are available, a line displays the number of items that are not visible, and a link displays to allow you to view all of the items. If you select this link, the page is redrawn with all available items displayed.

A New graphic will display to the right of the news item title in the My Community News section if the item has been posted since the last time you marked news items as read.

To view news items

1. Select Communities in the top navigation bar.
2. Click the appropriate community to display the Community Home Page.
3. Click the news item.



Community Home Page - News

To view archived news items

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to display the Community Home Page.

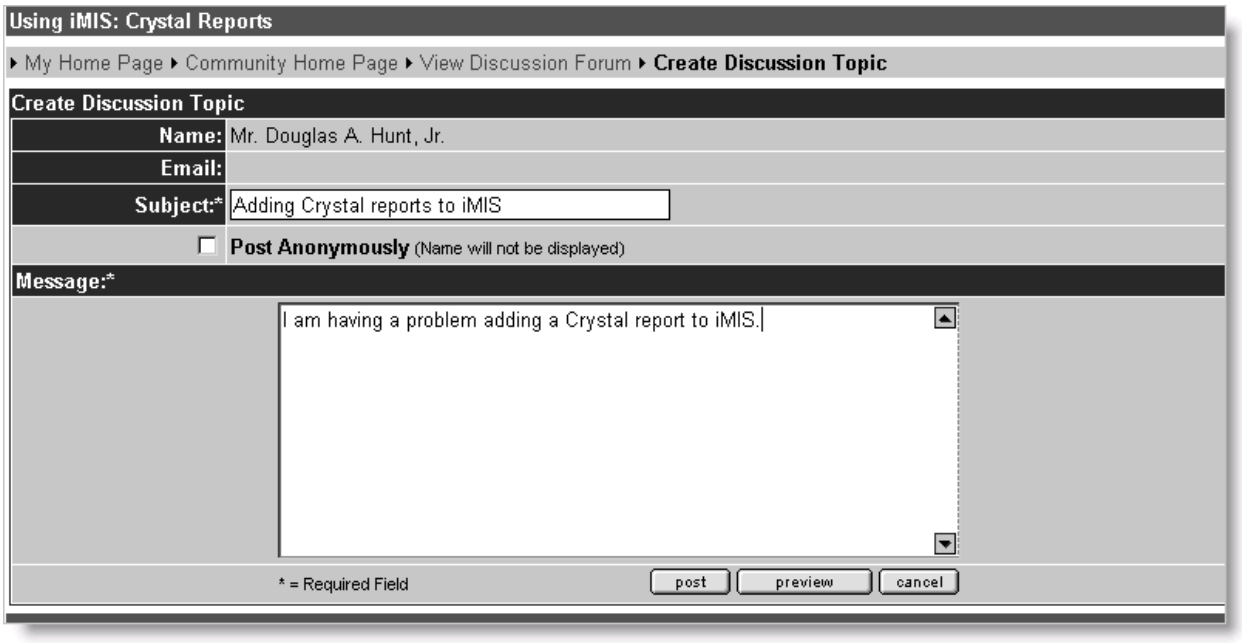
4. Click View News Archive. The news items with a status of Archive are sorted in date order.
5. Click the news item.

Participating in a Discussion

A customer can add discussion topics to any forum within a community they can access.

To create a discussion topic

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to open the Community Home Page.
4. Click the forum for which you want to add a discussion topic.
5. Click Create New Topic to open the Create Discussion Topic page.
6. Enter the Subject.
7. (optional) Enable the Post Anonymously option if you want to hide your user name when this topic displays on other discussion pages.
8. Enter the Message.
9. Click preview if you want to view the content before it is posted.
10. Click post to create the discussion topic.
11. A message indicating the discussion item was created successfully displays. Click OK.



Create a Discussion Topic page

To respond to or post a discussion topic

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to open the Community Home Page.
4. Click the forum. If a forum contains any new posts, the number of new posts is listed next to the forum.
5. Click the topic to display the View Discussion Topic page.

   The top section displays all topic postings in a tree view. A user can reply to any posting and the reply will display in the appropriate branch of the tree. A NEW graphic will display next to the title if a topic was posted since the last time the user marked the discussion item(s) as read.

   Note: The Edit this post option only displays if the current user posted the topic or if the current user is a member of the Administrator security group. The Delete this post option displays only if the current user is a member of the Administrator security group.

6. Click the Reply option that corresponds to the topic to which you want to respond.

   The Reply to Discussion Topic page opens with the user name or company name pre-filled into read only fields. The subject field is pre-filled with RE: and the subject of the message.

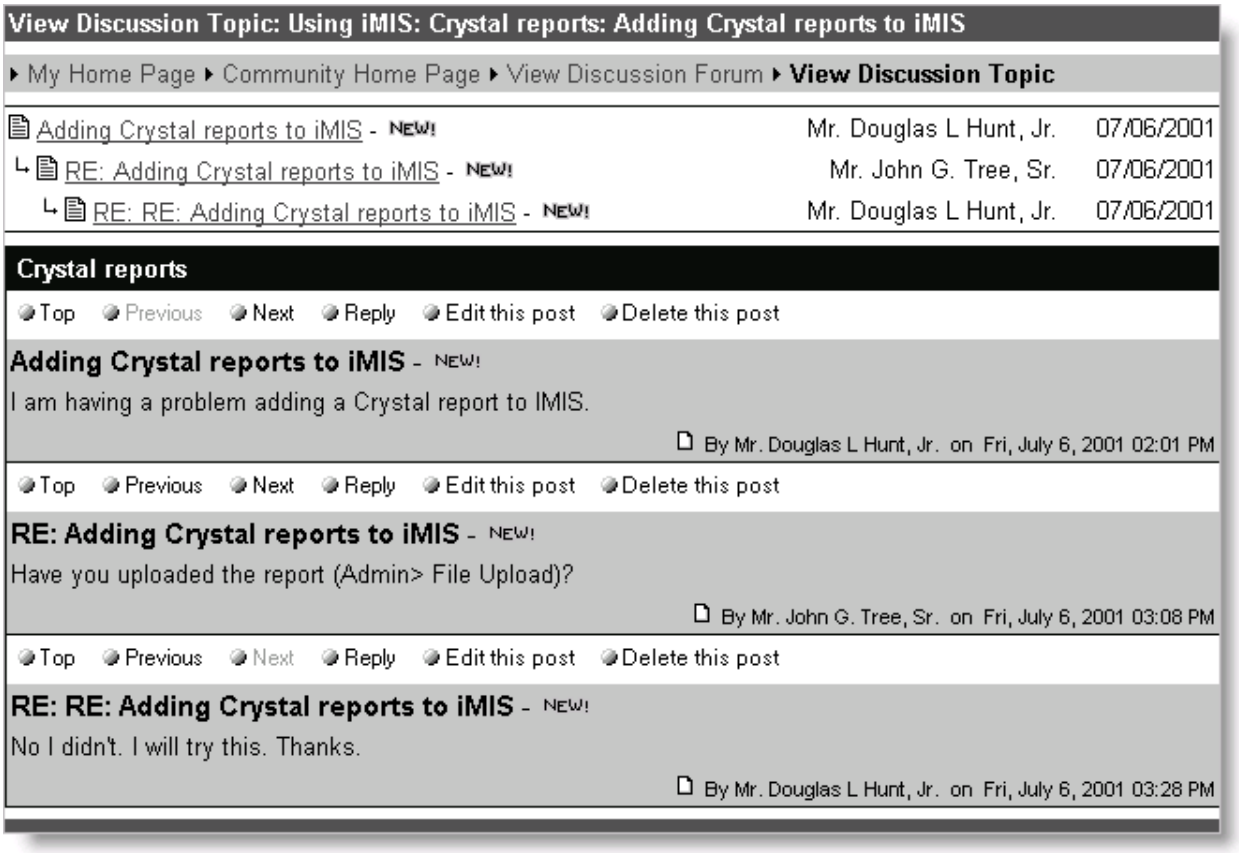
7. The Reply option is enabled by default. If you click New, the Subject line does not clear. However, you can enter a new subject.

8. (optional) Enable the Post Anonymously option if you want to hide your user name when this topic is displayed on other discussion pages.

9. Enter the Message.

10. Click post to create the discussion topic. A message indicating the discussion item was created successfully displays.

11. Click OK.



View Discussion Forum page

To view a discussion topic

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to open the Community Home Page.
4. Click the forum you want to view. If a forum contains any topics, the number of new posts is listed next to the forum. Discussion topics are sorted in date order.
5. Click the topic to display the View Discussion Topic page.

To edit a discussion post

You can only edit a topic that you posted.

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to open the Community Home Page.
4. Click the forum containing the topic you want to edit. If a forum contains any topics, the number of topics is listed next to the forum.
5. Click the topic to display the View Discussion Topic page.
6. Click Edit this post that corresponds to the posting. The Edit Discussion Post page displays.
7. Modify the topic.
8. Click post. A message indicating the discussion post was updated successfully displays.
9. Click OK.

To delete a discussion post

You can only delete a posting that you posted.

1. Log in to your e-Series site as an administrator or as a community administrator.

2. Select Communities in the top navigation bar.
3. Click the appropriate community to open the Community Home Page.
4. Click the forum. If a forum contains any posts, the number of new posts is listed next to the forum.
5. Click the topic to display the View Discussion Topic page.
6. Click Delete this post that corresponds to the post you want to delete.

   Note: Deleting a post also removes any posts that have replied to the post you are deleting.
7. A system message prompts you to verify the deletion of the posting. Click OK. The View Discussion Topic page updates.

Viewing archive documents

You can view documents and document folders in the document archive of your community.

Each document listing includes its file name, document description, document submitter, document posting date, and document size.

Each folder listing includes its folder name, folder description, document count, and the last date a document was posted to the folder.

Note: If the document count for a folder is 0, there is no last posting date.

Change the sort order of documents or folders by clicking the appropriate column heading. You can sort documents by their names, descriptions, posting dates, or sizes. You can sort folders by their names or their descriptions.

To view archive documents

1. Log in to your e-Series site.

2. Select Communities in the top navigation bar.
3. Click the appropriate community to display the Community Home Page.
4. The documents set with a priority as Hot are listed below the Document Archive area. You can click any document in this area to open the document.
5. Click View complete document archive to view all documents and folders.

   The documents located in the top half of this page open when selected.
6. If you want to view a document located in a folder, click the Folder Name to open the View Document Folder page.
7. Click the document you want to view.

View Document Archive page

Setting e-Series System Parameters

Overview of e-Series System Parameters

This section includes the system settings that apply to your entire e-Series site. Use only the latest version of Internet Explorer when administering your e-Series site and performing the following procedures:

- Setting up and editing Web, e-Customer, e-Billing, e-Events, e-Orders, and e-Communities System Parameters
- Displaying the save password option
- Saving user passwords
- Setting session variables
- Setting standard and European date formats
- Modifying locale code values
- Selecting required fields for new member records
- Setting the display mode for custom windows
- Customizing e-Communities prompts and fields
- Enabling e-Communities for security groups

The goal of this section is to give you the knowledge and skills necessary to set up, define, and use the system settings that are applicable to your entire iMIS e-Series site.

After completing this section, you will be able to do the following:

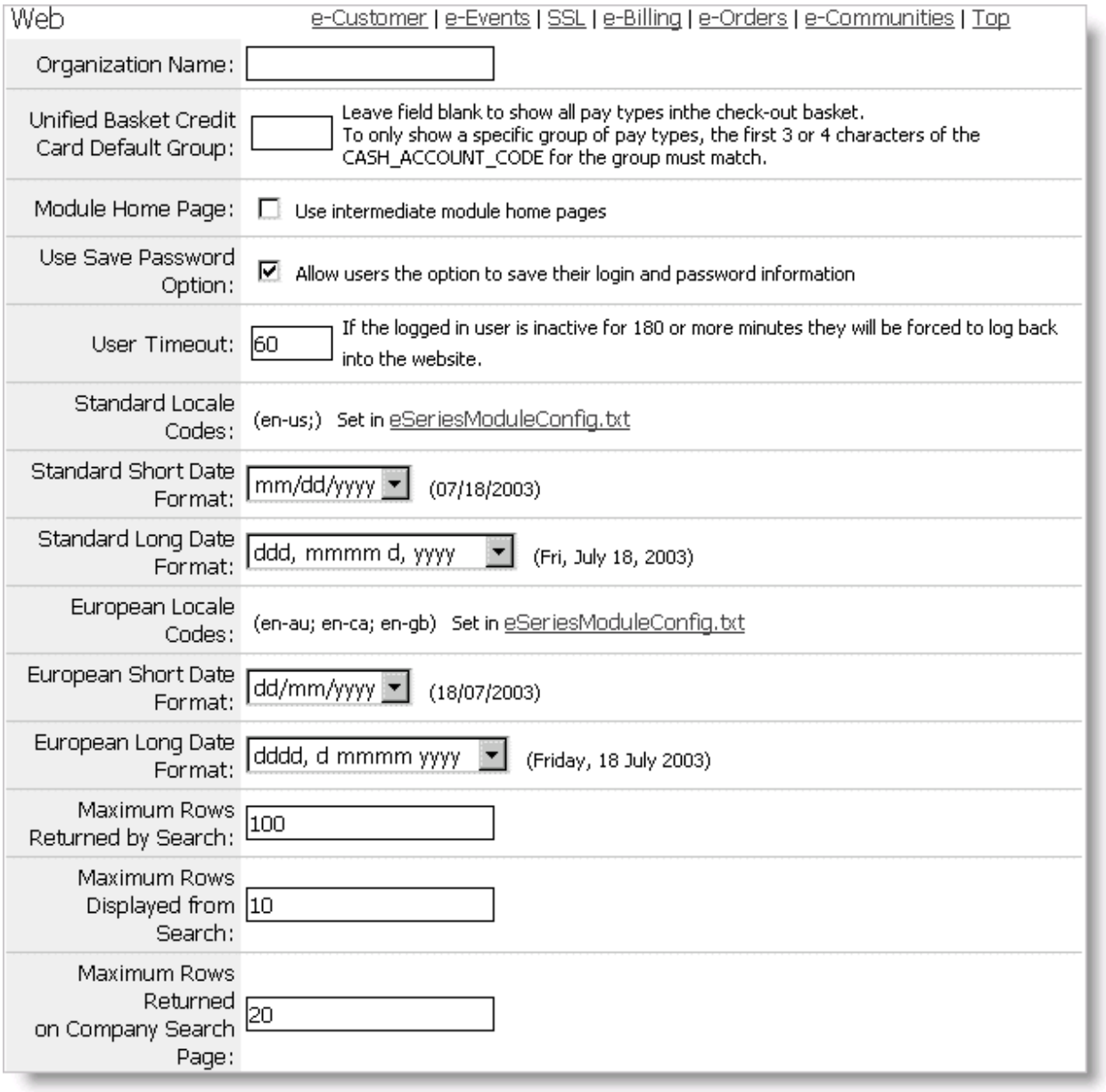
- Set Web, e-Customer, e-Billing, e-Events, e-Orders, and e-Communities System Parameters
- Save user passwords
- Set session variables and International date formats
- Use the Sign Up feature

Setting Web System Parameters

The Web System Parameters specify general display options (global defaults) for your e-Series site and are accessible only by Administrators. Define the Web System Parameters before defining the e-Customer System Parameters.

Caution! Changing settings in the System Parameters not only changes e-Series setup, but also affects the iMIS database. For this reason, be very careful when editing the System Parameters.

Web System Parameters page



Admin> Lookups> System Parameters> Web

Organization Name

Specifies the organization's name. The value you enter in this field displays in the side index and at the top of each page.

Caution: The value you enter in this field overrides the organization name in iMIS.

Unified Basket Credit Card Default Group

Enter a cash account to display a specific group of pay types on the Check-Out Basket page (the first four characters of the group's CASH_ACCOUNT_CODE must match). Leave the field blank to display all pay types on the Check-Out Basket page.

Module Home Page

Enable to allow the use of intermediate module home pages.

Use Save Password Option

Enable so users can save their passwords when logging in to e-Series (the Save password option displays on the Login page only when this option is enabled). If a user saves their password, the Password field on the Login page automatically populates each time the user logs in.

If session variables (User Timeout) have been set and a user has saved their password, the logged in user will not be required to log back into the site when the session variables time out.

If a user has not saved their password, the current time stamp is monitored. If the logged in user is inactive within the site for a period greater than or equal to the time limit set in the session variables, a system message displays requiring the user to log back into the site.

User Timeout

Specify the time a logged in user can be inactive before being forced to log back into the website. If a logged in user is inactive within the site for a period greater than or equal to the time limit set, the user will be required to log back into the site. This e-Series feature allows both the client and the session variables to be cleared upon logout.

Note: This time limit does not apply to users who have chosen to save their passwords. Only users who have not saved their passwords are required to log back into the site at the end of the session.

Standard Locale Codes

List of codes designated to use the US date format of MMDDYYYY to view or edit data. These codes are set in the _eSeriesConfig.txt file and define standard language and country codes. For example, en is the abbreviation used for the English language, and us is the abbreviation used for the United States.

To configure these settings, edit the eSeriesConfig.txt file to designate which input locale codes use the Standard (Western or US) format of MMDDYYYY (separate locale codes by semicolons):

<cfset Application.System.ST="(any locale code entered here will display as MMDDYYYY)">

For example, the following would allow all members with an input locale of en-us (United States) to see the MMDDYYYY format:

<cfset Application.System.ST="en-us;">

Standard Short Date Format

Select one of the three standard short date formats from this list:

- mm/dd/yyyy (default)
- mm-dd-yyyy
- mm dd yyyy

The system default values for the date formats are pre-defined in the ini-tializeapplicationvariables.cfm file. The date format selection is based on the locale set-tings of the web browser.

Standard Long Date Format

Select one of the three standard long date formats from this list:

- ddd, mmmm d, yyyy (default)
- dddd, mmmm dd, yyyy
- dddd, dd mmmm, yyyy

The system default values for the date formats are pre-defined in the initializeapplicationvariables.cfm file. The date format selection is based on the locale settings of the web browser.

European Locale Codes

List of codes designated to use the European date format of DDMMYYYY. These codes are set in the _eSeriesConfig.txt file and define standard European language and country codes. For example, en is the abbreviation for the English language and gb is the abbreviation used for Great Britain.

To configure these settings, edit the eSeriesConfig.txt file to designate which input locale codes use the European format of DDMMYYYY (separate locale codes by semicolons):

<cfset Application.System.EU="(any locale code entered here will display as DDMMYYYY)">

For example, the following would allow all members with an input locale of en-au (Australian), en-ca (Canadian), and en-gb (Great Britain) to see the DDMMYYYY format:

<cfset Application.System.EU="en-au; en-ca; en-gb">

European Short Date Format

Select one of the three European short date formats from this list:

- dd/mm/yyyy (default)
- dd-mm-yyyy
- dd mm yyyy

The system default values for the date formats are pre-defined in the initializeapplicationvariables.cfm file. The date format selection is based on the locale settings of the web browser.

European Long Date Format

Select one of the four European long date formats from the list:

- dddd, d mmmm yyyy (default)
- dddd, d mmmm yyyy
- dd mmmm yyyy
- d mmmm yyyy

The system default values for the date formats are pre-defined in the initializeapplicationvariables.cfm file. The date format selection is based on the locale settings of the web browser.

Maximum Rows Returned by Search

Use this field to limit the number of records (rows) returned when a user performs a search. For better performance and to limit risk to large databases, restricting the number of records returned from a search is recommended.

If the returned records exceed the maximum setting, the search ends, and users receive a message telling them to further define their search.

Maximum Rows Displayed from Search

Specifies how many records (rows) display on each returned search page.

Maximum Rows Returned on Company Search Page

Enter the number of records (rows) returned on the Company Search page.

Web Source Code

Select the source code to track how a record was entered in iMIS.

Security Filters Start

Enter the number of filters you can view when using the Find Filter security option.

Primary Forum

Specifies the name of the Primary Forum link that displays in the side index of the Home page.

Primary Path

Specifies the primary path or URL to the Primary Forum.

Secondary Forum

Specifies the name of the Secondary Forum link that displays in the side index of the Home page.

Secondary Path

Specifies the primary path or URL to the Secondary Forum.

Base Currency Code

Use this field to select the currency in which transactions are accounted. Though customers may display prices in their currency, the underlying price will still be stored in the database in the base currency.

Note: If the Display Alternative Currency prompt is checked, the Base Currency Code must be selected.

Display Alternative Currency

Use this check box to allow customers to display prices in the currency of their choice.

- Enabling this option places a drop-down currency list on web pages with price listings.
- Disabling this option displays price listings on web pages in the base currency, and the option to convert the price to an alternative currency is not displayed on web pages.

To edit Web System Parameters

1. Log in to your e-Series site as an administrator.

2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select Web to display the Web System Parameters page.
6. Enter the parameter information in the appropriate fields.

   Note: Do not enter the Organization Name if you are using iMIS. This parameter overrides the organization name in iMIS.

7. Update the System Parameters:

- Click Update. A message displays confirming that the system parameter information updated successfully.
- Click OK to return to the Lookup Lists page.
- Click Update System Variables.
- Click OK.

Hands-on exercise: Edit the Web System Parameters

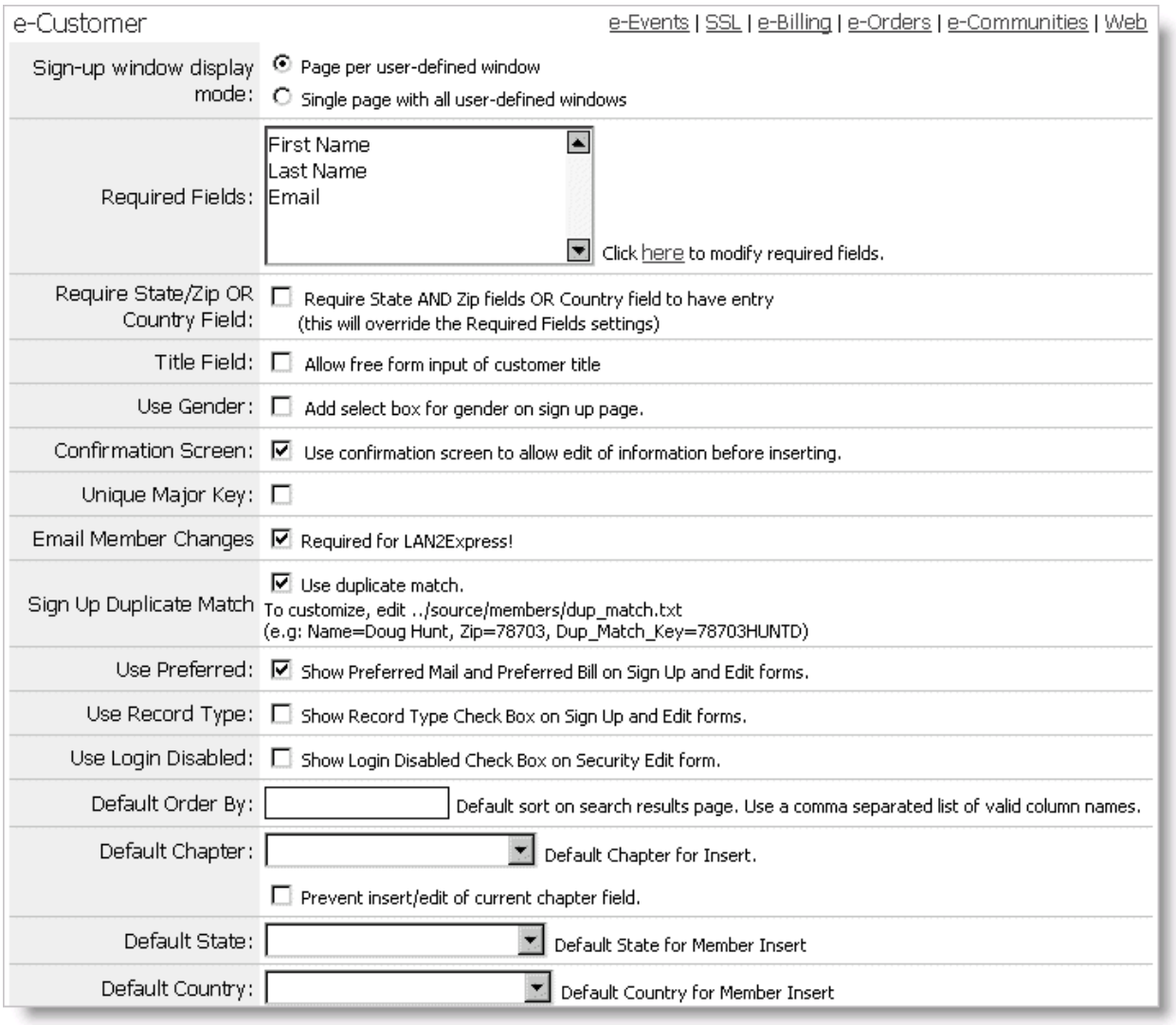
1. Enter the following Web System Parameters:

- Maximum Rows Returned by Search: 100
- Maximum Rows Displayed from Search: 10
- Web Source Code: Web
- Validation Screen Delay: 10
- Security Filters Start: 10
- Primary Forum: Primary Forum
- Primary Path: http//www.newsforum.com

2. Update the parameters.

Setting e-Customer System Parameters

e-Customer System Parameters page



Admin> Lookups> System Parameters

Sign-up window display mode

Enable the appropriate display mode to display either one page per user-defined Sign Up window or one page that contains all of the user-defined Sign Up windows:

- Page per user-defined window - Generates only the company name, address, and company ID fields (current layout).

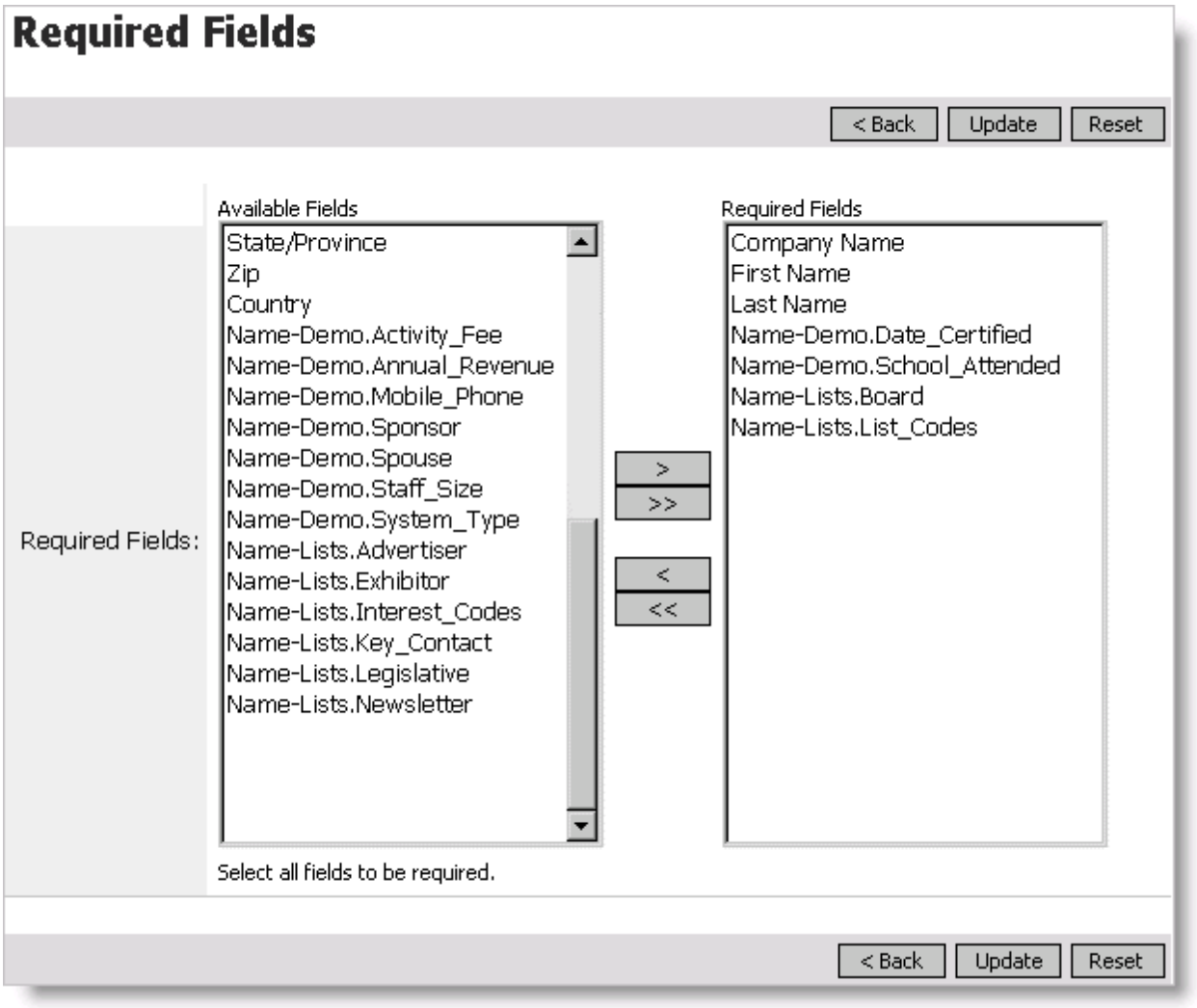
- Single page with all user - defined windows - Displays all user-defined windows attached to the Sign Up page such as home address and demographics.

  (If you want members or anonymous users to enter information in the custom windows, you will have to enable the Custom Windows filters on the Detail Security page. The user-defined and security windows will display on the page according to their security filter settings for anonymous users. Only the first instance of multi-instance windows will be allowed for entry on the Sign Up page. Additional instances will need to be added through the member profile.)

  Required Fields

  Displays the fields that require population by new users during sign up. Click here to open the Required Fields page and modify the required fields. From the list of Available Fields, select the field(s) you want to designate as required, and then update your selection.

  The Required Fields page allows you to designate which fields require population when entering new user records in e-Series. For all fields requiring population, users must populate the fields with the requisite data before proceeding.



Example of the Required Fields page showing both system and user-defined fields

Note: Ship Phone is a reference to the phone number field used in e-Orders. For logged in users, this field populates automatically with the user's work phone unless it is blank, then it populates automatically with the user's home phone. If both of these fields are blank, the Ship Phone field will be blank as well. For anonymous users, the shipping address information is stored in the Name table for later reference.

Require State/Zip OR Country Field

Enable to require the State and Zip fields or the Country field to have an entry.

Title Field

Enable to allow the free form input of the customer title.

Use Gender

Enable to display the Gender field on the Sign Up page.

Confirmation Screen

Enable to display a confirmation screen when a customer signs up.

Unique Major Key

(Overrides the setting in iMIS) The unique value entered in this field becomes the major key value if your organization selects a value for the major key other than the member ID.

Email Member Changes

Enable to have an email sent automatically to your organization's contact whenever a customer's record is added or changed. The email is sent whenever changes occur to the Name table.

Sign Up Duplicate Match

If enabled, this option prevents users from inserting duplicate records. If a customer's record is already on file and they try to sign up, they receive the error message, Another member has a profile similar to your own, and your application cannot be processed. Please contact the association directly to sign up.

Use Preferred

Enable to use the preferred billing and mailing addresses on the Sign Up and Edit pages.

Use Record Type

Enable to display the Record Type checkbox on the Sign Up and Edit pages.

Use Login Disabled

Enable to show the Login Disable checkbox on the Security Edit pages.

Default Order By

Specifies the default sort order for the Search Results page.

Default Chapter

Select the default chapter for new customer records.

Prevent insert/edit of current chapter field

Enable to prevent the entering/editing of the current Chapter field.

Default State

Select the default state for new customer records.

Default Country

Select the default country for new customer records.

Days to Expire

Enter the number of days until a password expires after being entered in the system. Use this option to require users to update their passwords.

Member Type used for Anonymous Sign Up

Specifies the customer type that will be assigned to anonymous users when they sign up. Web is the default customer type.

Security Group Auto-Assign

Enable an option for automatically assigning security groups to new customer records (you can enable only one option at a time):

- Default - Enable to assign all new records to the Anonymous security group.
- Security Group - Enable to assign all new records to an existing security group (select a security group from the drop-down list).

Additional Info Insert Title

Enter the title of the prompt that is used to inform customers that more information is available.

Additional Info Sign-Up Message

(optional) Specifies the additional information that displays on the Additional Information Signup page.

Additional Info Edit Title

Specifies the title of the message that will be sent to individuals who edit customer information.

Additional Info Edit Message

Enter the information sent to users who edit their customer information.

Currency Type

Enter the symbol for the currency type used when processing customer information. For example, enter $ for dollars. Any symbol and/or letters may be used. This field does not calculate currency exchanges.

Chapter Prompt

(Overrides the setting in iMIS) Specifies the Chapter field prompt that displays on the Sign Up page.

Address One Prompt

(Overrides and changes the default address purpose setting in iMIS) Enter the first Address field prompt that displays on the Sign Up page.

Address Two Prompt

(Overrides and changes the default address purpose setting in iMIS) Enter the second Address field prompt that displays on the Sign Up page.

Address Three Prompt

(Overrides and changes the default address purpose setting in iMIS) Enter the third Address field prompt that displays on the Sign Up page.

State/Province Prompt

(Overrides the setting in iMIS) Specifies the State/Province field prompt that displays on the Sign Up page. This is a required field.

Zip/Postal Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Addresses and Notes window (Membership> Utilities> System Setup> click Address and Notes). If you change this prompt in e-Series, it changes the setting in iMIS.

Note One Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Addresses and Notes window (Membership> Utilities> System Setup> click Address and Notes). If you change this prompt in e-Series, it also changes the setting in iMIS.

Note Two Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Addresses and Notes window (Membership> Utilities> System Setup> click Address and Notes). If you change this prompt in e-Series, it also changes the setting in iMIS.

Note Three Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Addresses and Notes window (Membership> Utilities> System Setup> click Address and Notes). If you change this prompt in e-Series, it also changes the setting in iMIS.

CEU Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Advanced window (Membership> Utilities> System Setup> click Advanced). If you change this prompt in e-Series, it changes the setting in iMIS.

Major Key Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Basic Options window (Membership> Utilities> System Setup> click Basic Options). If you change this prompt in e-Series, it changes the setting in iMIS.

Institute Prompt

e-Series with iMIS: This prompt is set in iMIS in the Membership Setup - Basic Options window (Membership> Utilities> System Setup> click Basic Options). If you change this prompt in e-Series, it changes the setting in iMIS.

To edit e-Customer System Parameters

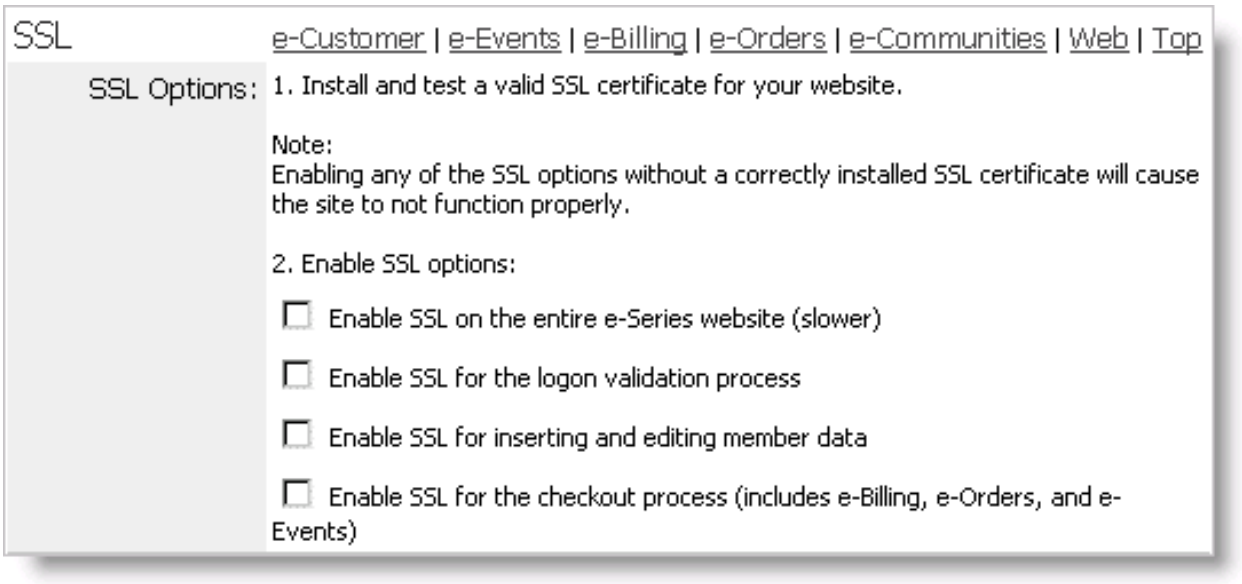
1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select System Parameters to open the e-Customer System Parameters page.
5. Enable the desired options, and enter the parameter information in the appropriate fields.
6. Update the System Parameters:

- Click Update. A message displays confirming that the system parameter information updated successfully.
- Click OK to return to the Lookup Lists page.
- Click Update System Variables.
- Click OK.

Setting the SSL System Parameters

The SSL System Parameters allow you to define the Secure Sockets Layer protocols for your e-Series site.

SSL System Parameters page



Admin> Lookups> System Parameters> SSL

Enable SSL on the entire e-Series website (slower)

Enable SSL for the entire e-Series website.

Enable SSL for the logon validation process only

Enable SSL for the logon validation process only.

Enable SSL for inserting and editing member data

Enable SSL for entering and editing customer data.

Enable SSL for the checkout process

Enable SSL for the checkout process.

To edit SSL System Parameters

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select SSL to display the SSL System Parameters page.

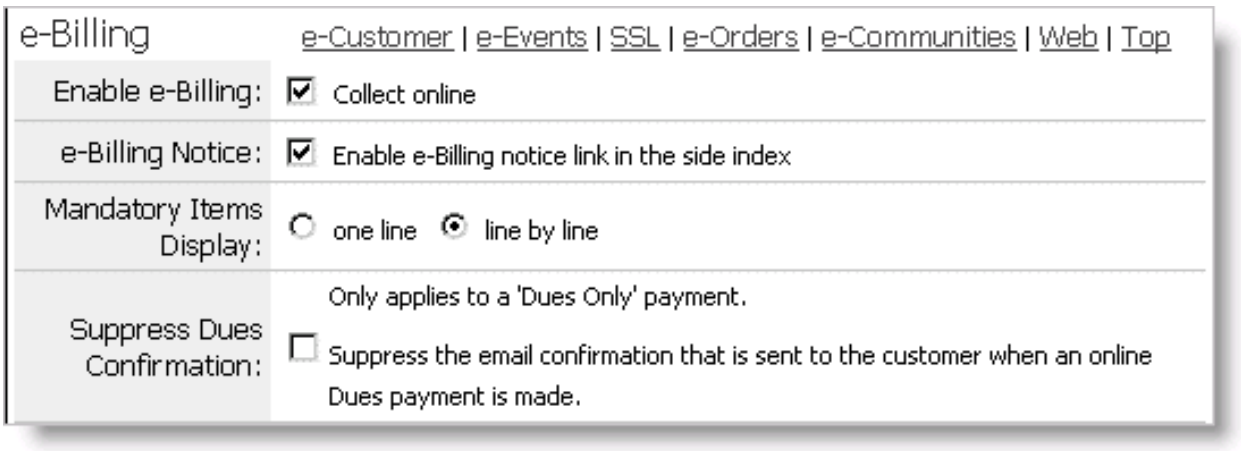
6. Enable the desired options.
7. Click Update. A message displays confirming that the system parameter information updated successfully.
8. Click OK to return to the Lookup Lists page.
9. Click Update System Variables.
10. Click OK.

    Note: You must click both the Update button on the System Parameters page and the Update System Variables button on the Lookup Lists page for the changes to the system to take place.

Setting e-Billing System Parameters

The e-Billing System Parameters allow you to collect payments online and to display Billing notices.

e-Billing System Parameters page



Admin> Lookups> System Parameters> e-Billing

Enable e-Billing

Enable to allow customers to make online payments.

e-Billing Notice

Enable to display e-Billing notice links in the side index. An e-Billing Reminder link will display under the customer's Profile section and in the top navigation bar if the customer has unpaid Dues.

Mandatory Items Display

Enable one of the options to display mandatory items in either a one line display or in a line-by-line display.

If line by line is enabled for the Mandatory Items Display option in the e-Billing System Parameters, and if a description is defined for the product in iMIS on the Billing Set up products window (from Billing, select Set up module> Products), a Note icon displays next to a dues-billing product's title on the e-Billing Reminder page.

The Note icon indicates that a description of the product is available. When users mouse-over a product's title or Note icon, the product's description displays.

Caution! For this feature to work, you must enable line by line. If you enable the one line option, the mouse-over functionality will not work.

Suppress Dues Confirmation

Enable to suppress the confirmation email sent to customers for Dues payments.

To edit e-Billing System Parameters

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Billing to display the e-Billing System Parameters page.
6. Enable the desired options.
7. Click Update. A message displays confirming that the system parameter information updated successfully.

8. Click OK to return to the Lookup Lists page.
9. Click Update System Variables.
10. Click OK.

    Note: You must click both the Update button on the System Parameters page and the Update System Variables button on the Lookup Lists page for the changes to the system to take place.

Setting the e-Orders System Parameters

You can open your store for business by enabling the Open Store option in the e-Orders System Parameters page.

e-Orders System Parameters page

Open Store

Enable when you are ready to allow online ordering.

To set the e-Orders System Parameters

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select System Parameters to display the System Parameters page.
5. Select e-Orders.
6. Enable the Open Store option to open your online store.
7. Click Update. A message displays confirming that the system parameter information updated successfully.

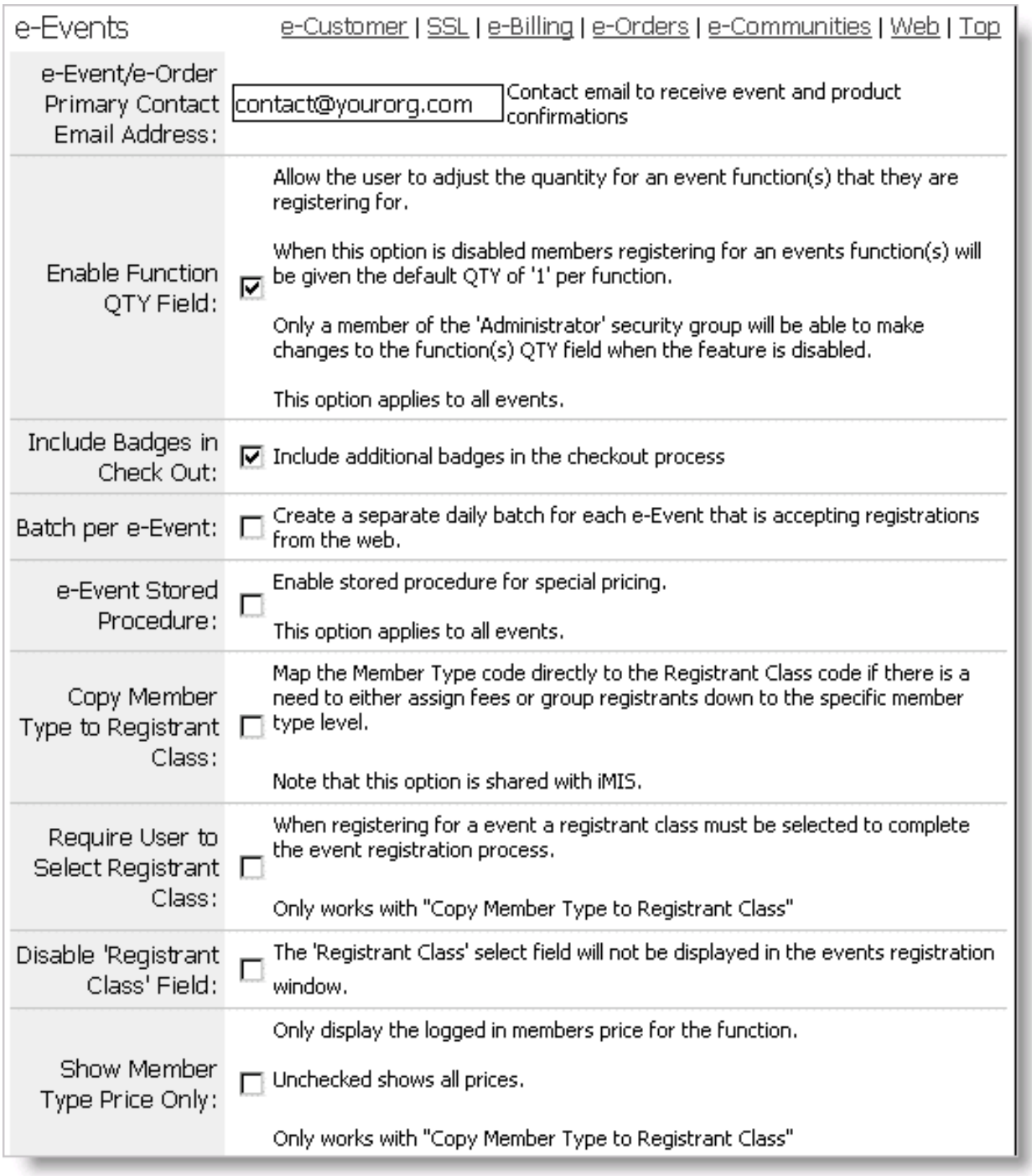
8. Click OK to return to the Lookup Lists page.
9. Click Update System Variables.
10. Click OK.

    Note: You must click both the Update button on the System Parameters page and the Update System Variables button on the Lookup Lists page for the changes to the system to take place.

Setting e-Events System Parameters

The e-Events System Parameters specify information about your events and how they display in your e-Series site.

e-Events System Parameters page



Admin> Lookups> System Parameters> e-Events

e-Event/e-Order Primary Contact Email Address

Enter the contact email address for receiving event and product confirmation messages. The email address entered in this field is used as the From address when an email confirmation is sent to a registrant.

Enable Function QTY Field

(Enabled by default) Applicable for all customers registering for event functions on the Event Registration page:

- Enable Function QTY Field enabled - Customers can edit the registration Qty field of the event functions for which they are registering.
- Enable Function QTY Field disabled - Customers cannot edit the registration Qty field of the event functions for which they are registering; they will be limited to the default of one registration per function. (Only members of the Administrator security group can edit an event function's Qty field on the Event Registration page when the Enable Function QTY Field option is disabled.)

Include Badges in Check Out

Enable to allow e-Events registrants to enter and edit badge information before checking out:

- Include Badges in Check Out enabled (and the Insert and Edit Meeting Badges security filters are enabled) - Registrants are able to view, enter, and edit badge information for any event. Registrants are taken directly to the Badge Maintenance page after clicking check-out on the Event Registration page.
- Include Badges in Check Out disabled - Registrants are unable to view or edit badge information for any event. Badges links are hidden from view on all applicable pages, and registrants cannot access the Badge Maintenance page at any stage of the event registration process.

Batch per e-Event

Enable to create a separate daily batch for each e-Event that is accepting online registrations (cannot be used in unified basket).

e-Event Stored Procedure

Enable to activate a stored procedure for special pricing. When the e-Event Stored Procedure option is enabled, e-Events is instructed to call the stored procedure sp_asi_event_price during checkout. The stored procedure is called with arguments for ID, IP_ADDRESS, and MEETING code. These codes correspond to:

Basket_Meeting.ID

Basket_Meeting.IP_ADDRESS

Basket_Meeting.MEETING

Basket_Function.ID

Basket_Function.IP_ADDRESS

Basket_Function.MEETING

Copy Member Type to Registrant Class

Enable to determine function fees for event registrants by mapping the registrant class with the customer type and to display the Registrant Class drop-down list on the Event Registration page.

When the Copy Membership Type to Registrant Class option is enabled in the iMIS Event System Preferences window (from Events, select Set up module, and click Preferences), iMIS looks for the registrant class that matches the registrant's customer type when a customer registers for an event. The registrant class is mapped to the customer type if they match. If the registrant class and customer type do not match, then iMIS maps the registrant class according to whether the customer is a Member or Non-Member.

The Copy Member Type to Registrant Class parameter duplicates the functionality of the iMIS option. In addition, the Registrant Class drop-down list also displays on the Event Registration page when the Meet Reg Class Over Ride security filter is enabled (Yes) on the Detail Security page (Admin> Security> Filters). The Registrant Class drop-down list allows logged-in users to select their registrant class when registering for events.

However, some e-Events administrators do not want customers to be able to select or override their Registrant Class when registering for events.

Require User to Select Registrant Class

Enable to require the customer to select a registrant class when registering for an event. This option works only when the Copy Member Type to Registrant Class option is enabled.-

Disable Registrant Class Field

When the Disable Registrant Class Field option is enabled, the Registrant Class drop-down list will be disabled on the Event Registration page; however, the registrant classes that display in the Function Detail section of the Event Registration page will not change. -

Note: The Registrant Class drop-down list displays on the Event Registration page only when the Copy Member Type to Registrant Class option and the Meet Reg Class Over Ride security filter (Detail Security page) are enabled.

Note: In addition to the Disable Registrant Class Field option, the Registrant Class drop-down list also can be disabled by disabling the Meet Reg Class Over Ride security filter on the Detail Security page.

Show Member Type Price Only

Shows the member type price, non-member or member, on the Function Detail window. This only applies when Copy Member Type to Registrant Class is selected.

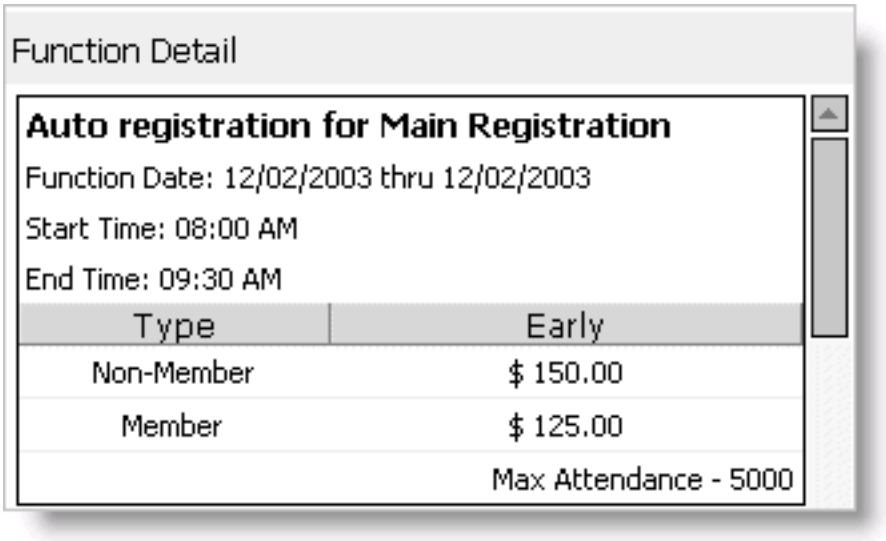
Show Current Date Price Only

Enable to display event function fees according to the date the fees become effective. When this option is enabled, the effective date of event function fees is determined by the following:

1. Early, Regular, and Late function fees defined for a customer's Registrant Class on the Event Function Definition - Fees window in iMIS.
2. Early Cutoff and Reg Cutoff dates defined for the event on the Define an event window in iMIS.

If you have defined Early, Regular, and Late function fees for a customer's Registrant Class, the function fees that display for the registrant on the Event Registration page in e-Series are dependent on the event's Early Cutoff and Reg Cutoff dates.

For example, if a customer registers for an event function before the Early Cutoff date (as determined by the server's system date), only the Early fee defined for the customer's Registrant Class on the Event Function Definition - Fees window displays on the Event Registration page in e-Series.



Example of the Event Registration page when the Show Current Date Price Only parameter is enabled (for a registrant who registers before the Early Cutoff date)

Example of the Event Registration page when the Show Current Date Price Only parameter is disabled

Note: To customize the text that displays for Early, Regular, and Late on the Event Registration page, edit the eEventsConfig.txt file on the Module Config Files page (select Admin> Style Form, and select Edit Config Files).

e-Event Registration ID Field Type

Determines a user's specific registration capabilities when registering for events on the Event Registration page:

- No Field - Enable if you want only a logged in user to be able to register for events. When the No Field option is enabled, the Member ID field on the Event Registration page is not editable.
- Text - Enable if you want users to have the ability to register other users that have valid customer IDs. When the Text option is enabled, the Member ID field on the Event Registration page is editable.
- Select - Enable if you want company members to be able to select and register fellow company members for events. The Select option uses a select statement to populate the Member drop-down list on the Event Registration page (the Member drop-down lists all of the name records that have the same Name.CO_ID that have not registered for the event).

  Note: The Select option is not applicable for anonymous users. If an anonymous user is logged in to e-Series, the Member drop-down list on the Event Registration page will display only that user's name if the Select option is enabled.

e-Event Registration ID Select Argument field

A select statement entered in the e-Event Registration ID Select Argument field populates the Member drop-down list on the Event Registration page. This select statement is only in effect when the Select option is enabled in the e-Event Registration ID Field Type. This select statement is used to further define the list of returned name records.

Enable Duplicate Registration Checking

Enable to activate duplicate registration checking.

Warning for Maximum Registrants

Enable to display a warning when the number of registrants for an event exceeds the limit. Once the limit has been met, potential registrants receive a message stating that the event is full, and they are not allowed to register.

e-Event Function Default Order By

Enter the table name and the column name to sort event functions. Separate multiple column names with commas.

Maximum Rows for e-Event Functions

Enter the maximum number of event functions that will be returned from a search.

Maximum Rows Displayed from e-Event Functions

Enter the maximum number of event functions that will be displayed per page after performing a search.

Maximum Rows for e-Event Meetings

Enter the maximum number of events that will be returned from a search.

Maximum Rows Displayed from e-Event Meetings

Enter the maximum number of events that will be displayed per page after performing a search.

Maximum Time to Cache e-Event Queries

Enter the time limit to specify the length of time that you want ColdFusion to cache queries run through e-Events. The format is CreateTimeSpan(Days, Hours, Minutes, Seconds).

This setting is useful for sites that expect heavy volumes of traffic and that have large and numerous events. When the Event Registration page is opened, several standard and complex queries run in addition to a simple query per function. Constant execution of these queries increases the load on the database server and could result in performance

problems. An alternative is to enable the e-Events cache for an appropriate period of time so that ColdFusion can use the cached queries to build the page and avoid hitting the database.

However, if you are toggling between iMIS and e-Series while setting up a new event with the cache enabled, changes will not be reflected until the cached query has expired. If changes made to your event are not reflected automatically in your e-Series site, either wait for the cache to expire or disable it altogether while you are testing.

To disable the cache, set all of the values to zero: CreateTimeSpan(0,0,0,0).

Early Registration Prompt

Enter the prompt that displays on the Event Registration page reminding customers of the early registration deadline.

Late Registration Prompt

Enter the prompt that displays on the Event Registration page reminding customers of the late registration deadline.

Conflict Code Message

Enter the message that displays when there is a scheduling conflict.

Conflict codes are used in determining conflicts at the time of registration such as date and time conflicts or event content conflicts. Registering for conflicting functions will yield the warning message that you define in this field.

e-Event Edit Message

Enter the message that displays on the Purchase Detail page.

e-Event General Message

Enter the message that displays on the Event Registration page above the event function price list.

Registrant e-Mail Greeting

Enter the message that displays when a customer registers for an event.

Full e-Event Prompt

Enter the message that displays when the event is at registration capacity.

Full Function Prompt

Enter the message that displays when the event function is at registration capacity.

Web Instructions

Enter the message that displays on the Event Registration page if the customer has forgotten to log in or if the customer's login is not recognized by the system.

Sign Up Instructions

Enter the message that displays on the Event Registration page for the link to the Sign Up page.

Log In Instructions

Enter the message that displays on the Event Registration page for the link to the Login page.

Lost Registration Instructions

Enter the message that displays explaining the process to investigate a lost customer registration.

To edit e-Events System Parameters

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Events to display the e-Events System Parameters page.
6. Enable the desired options.
7. Enter the parameter information in the appropriate fields.

8. Click Update. A message displays confirming that the system parameter information updated successfully.
9. Click OK to return to the Lookup Lists page.
10. Click Update System Variables.
11. Click OK.

    Note: You must click both the Update button on the System Parameters page and the Update System Variables button on the Lookup Lists page for the changes to the system to take place.

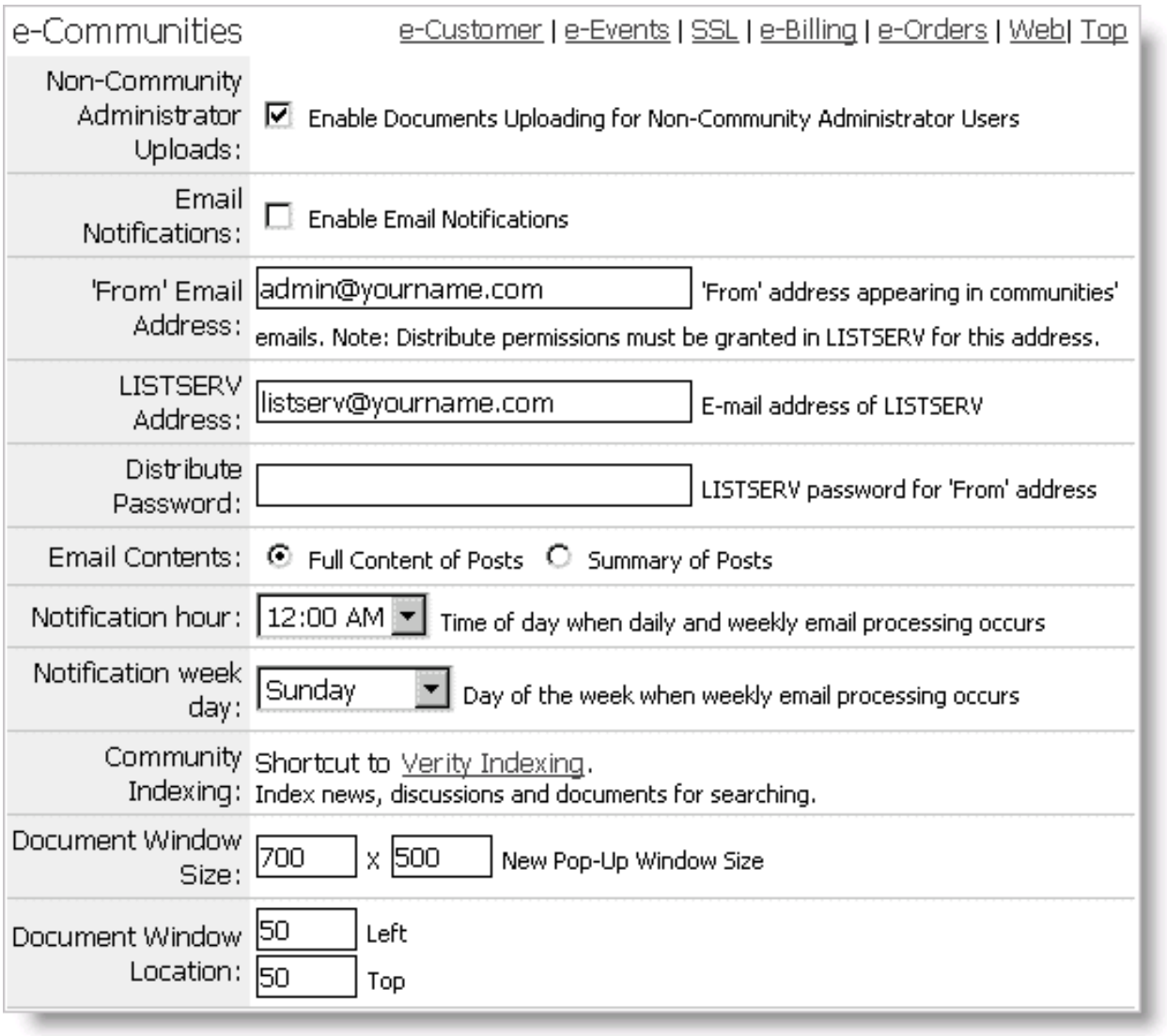
    Hands-on exercise: Set e-Events System Parameters
    Set the following e-Events System Parameters:

- Enable the Enable Duplicate Registration Checking option.
- Enable the Warning for Maximum Registrants option.
- Maximum Rows for e-Event Functions: 100.
- Maximum Rows Displayed from e-Event Functions: 10.
- Maximum Time to Cache e-Event Queries: 0.
- Early Registration Prompt: Early Registration Deadline.
- Late Registration Prompt: Late Registration Deadline.
- e-Event Edit Message: If Meeting Registrations need to be edited, contact our office.
- e-Event General Message: Thank you for your interest in our online events. Contact us if you want to make changes to your registration.
- Registrant e-Mail Greeting: You are registered for the following functions.
- Full e-Event Prompt: This event is full. If you would like to be placed on a wait list, contact us.
- Full Function Prompt: If the function is full, contact us for availability.

- Web Instructions: It appears that you are not a member or that you have forgotten to log in.
- Sign Up Instructions: If you are not currently a member, sign up and submit your information for membership.
- Log In Instructions: If you are a member, login and register for the event.
- Lost Registration Instructions: If you are using Netscape and resize your browser when entering your event registration, the registration may be lost.

Setting e-Communities System Parameters

The e-Communities System Parameters specify information about your communities and how they are displayed in your e-Series site.



Admin> Lookups> System Parameters> e-Communities

Non-Community Administrator Uploads

Enable to allow users to upload documents to the community.

Email Notifications

Enable to notify community members by email of new community items.

From Email Address

Enter the email address that will display as the 'from' address on all emails sent from communities.

LISTSERV Address

Enter the address used to send jobs to LISTSERV.

Distribute Password

Enter the password that matches the password set in LISTSERV. This password is used by LISTSERV to determine if documents received are from a valid user.

Email Contents

Enable the appropriate option:

Full Content of Posts - Enable if you want emails to list the complete contents of all new posts.

Summary of Posts - Enable if you want emails to list a summary of the contents of all new posts.

Notification hour

Select the time of the day when both daily and weekly email notifications are processed (setting this time to a night when activity is low is recommended).

Notification week day

Select the day when both daily and weekly email notifications are processed.

Community Indexing

Select the shortcut to Verity Indexing to open the Collection Actions page and set up Verity Indexing.

Document Window Size

Enter a size for pop-up windows.

Document Window Location

Enter a location for pop-up windows.

To edit the e-Communities parameters

1. Log in to your e-Series site as an administrator (or as a member of a security group that allows browsing and editing of Admin Style Forms).
2. Select Admin in the top navigation bar.
3. Select Admin > Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to display the System Parameters page.
5. Select e-Communities.
6. Enable the desired options, and enter the parameter information in the appropriate fields.
7. Click Update. A message displays confirming that the system parameter information updated successfully.
8. Click OK to return to the Lookup Lists page.
9. Click Update System Variables.
10. Click OK.

    Note: You must click both the Update button on the System Parameters page and the Update System Variables button on the Lookup Lists page for the changes to the system to take place.

Setting Up e-Communities

Overview of Setting Up e-Communities

The e-Communities module of e-Series provides the framework and applications that allow you to create and manage a wide variety of communities for your organization's website. These communities are areas where visitors with like interests can do the following:

- Browse topics of common interest
- Subscribe to communities
- View community news

- Participate in discussion forums
- Contribute and download shared documents

Community Types

When setting up and customizing the e-Communities module, you can create three different types of communities:

- Public - available to all site visitors including contacts and guests.
  Users that have not logged in may only browse the community, but a login is required to post documents and participate in discussions. This is referred to as 'read-only' access to the community.
- Members Only - available only to members of the association that meet the membership filter requirements.
- By Invitation - available to any contact that the association administrator chooses to add to the invitation list.

The facilities available to users of these communities are identical regardless of community type. However, certain communities are open to the public while others may be available only to dues paying members of the organization. Members and the general public must be logged in to “subscribe” to specific communities, which may give them deeper levels of access and a home page that consolidates news from the various communities they are interested in.

The goal of this section is to give you the knowledge and skills necessary to use the e-Communities module.

After completing this section, you will be able to do the following:

- Manage communities, community e-mail lists, community news items, community discussion forums, and documents
- Set up and maintain Verity indexing
- Schedule Verity collection maintenance

Managing e-Communities

e-Communities can be set up as public or can be made available only to certain members of an organization.

Note: We recommend that you use Internet Explorer to manage your communities. Javascript is used in e-Communities preview windows. Many browsers will have the javascript disabled for security reasons. This will prevent e-Communities from displaying preview windows.

e-Communities Administrators

The following tasks may be performed by a member who is designated as an e-Communities administrator.

- Add members to a community
- Remove members from a community
- Edit a community
- Delete a community
- Search and add other administrators to a community
- Search and remove other administrators from a community
- Create and delete folders
- Start discussion topics
- Edit posts
- All tasks available to ordinary members of a community, such as placing or deleting documents

Note: Only e-Series administrators have permissions to create new communities.

To create a community

- All site visitors can access a Public community. However, users not logged in may only browse a community.

- A Members Only community allows only members in selected chapters, selected committees, or selected member types to access the community. If multiple chapters, committees, or member types are selected, members must be in at least one of the selected chapters, committees, or member types to access the community.

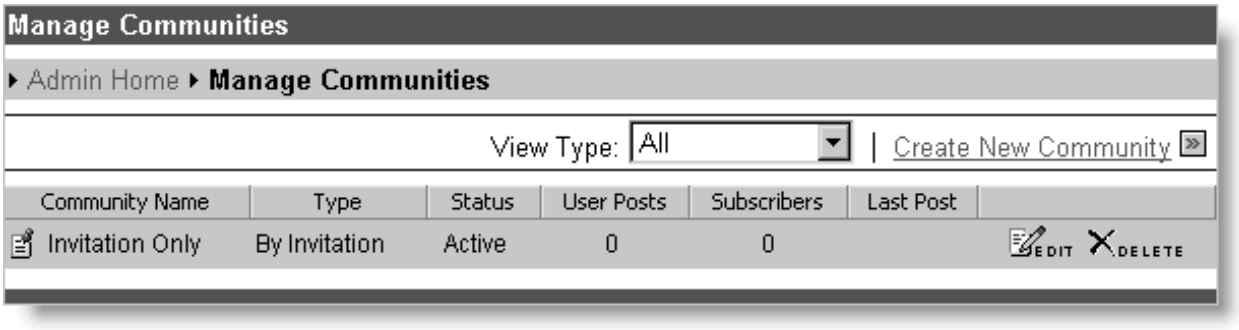
  Members Only communities that are restricted by chapter must have a chapter code listed in the member's subscription record. You can use a SQL Advanced restriction to limit by Name.CHAPTER.

- A By Invitation community allows only those members invited to the community to access the community.

1. Log in to your e-Series site as an administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Create New Community to open the Create Community page.
5. Enter the Title of the community.
6. Enter a short Description for the community. This description displays below the community name on the User Home Page.
7. Click the Status drop-down list and select Active. You may want to set the status to Inactive when first creating a community, and then change the status to Active after everything has been configured.
8. Click the Type drop-down list and select Public, Members Only or By Invitation.
9. (optional) If Members Only, click the Restrict Access By drop-down list and select Chapter, Committee, Member Type, or SQL (Advanced Only). The following field changes depending on the Restrict Access By selection. For example, if you select to restrict access by Chapter, a list of all chapters displays.
10. The Maximum Discussion Topic Age is the number of days after a topic is posted that the topic and comments will display in the View Discussion Topic page. After the maximum

number of days is met, the topic and comments are archived and can only be viewed by an administrator.

11. Click submit.
12. A message indicating that the community was created successfully displays. Click OK.



Manage Communities page

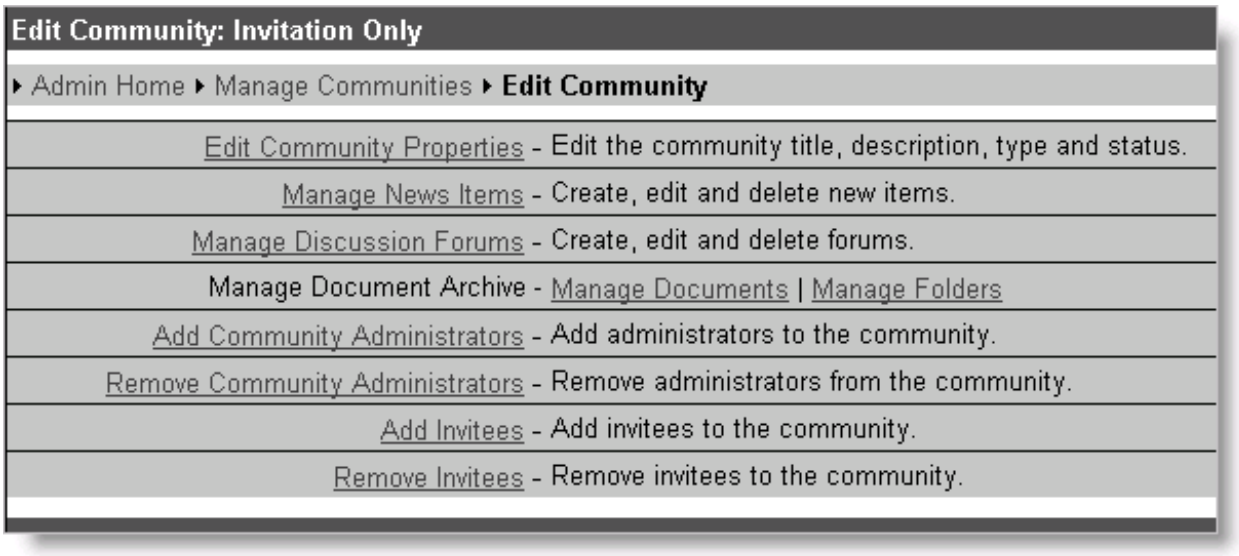
Create a Community page

To add invitees to By Invitation communities

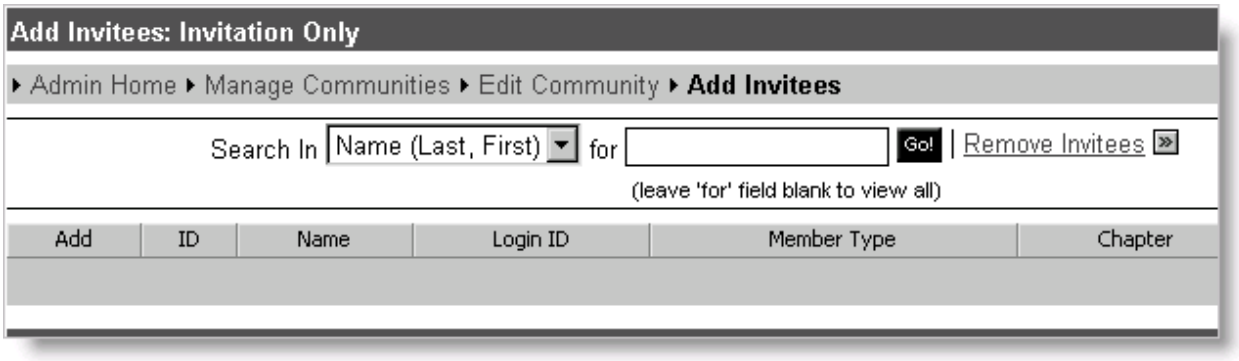
In order to invite members, you will have to search the database and then select the members from the search results.

Note: A web login and password must be created for the user before they can log in as an invitee. Refer to “Assigning Security Logins and Passwords” for more.

1. Log in to your e-Series site as an administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the By Invitation community. The Edit Community page displays.
5. Click Add Invitees.
6. Click the Search In drop-down list and select Name (Last, First), ID, Member Type, or Chapter.
7. (optional) Press Tab and enter specific information you want to search for based on the Search In selection. Leave the field blank to view all records.
8. Click Go. A list of members fitting the search criteria displays on the page.
9. Click the Add checkbox that corresponds to the member(s) you want to add to the list of invitees or click select all to include all members listed.
10. Click add selected. A message indicating that the invitees were added successfully displays.
11. Click OK.
12. (optional) If your list continues on multiple pages and you want to add additional members, click the page number that contains the names of the members you want to invite or click Next to view the next page.



Edit Community: Invitation Only page



Add Invitees: Invitation Only page

To remove invitees from a community list

1. Log in to your e-Series site as an administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the By Invitation community. The Edit Community page displays.
5. Click Remove Invitees.

6. Click the Search In drop-down list and select Name (Last, First), ID, Member Type, or Chapter.
7. (optional) Press Tab and enter specific information you want to search for based on the Search In selection. Leave the field blank to view all records.
8. Click Go. A list of members currently invited to the community displays.
9. Click the Remove checkbox that corresponds to the member(s) you want to remove from the list of invitees or click select all to remove all members listed.
10. Click remove selected.
11. A message indicating the invitees were removed successfully displays. Click OK.

To create a Members Only community with a SQL query

There is an advanced SQL query feature that you can use when creating a Members Only community. The SQL query defines the filter that determines what members have access to the community. For example, you may to create a community for members who live in a particular zip area or in a particular state.

1. Log in to your e-Series site as an administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Create New Community to open the Create Community page.
5. Enter the Title of the community.
6. Enter a short Description for the community. This description displays below the community name.
7. Click the Status drop-down list and select Active.
8. Click the Type drop-down list and select Members Only. Two additional fields display.
9. Click the Restrict Access By drop-down list and select SQL (Advanced).

10. Enter the SQL query in the Member only Criteria field. In the following example, a community has been created for Prodigy employees with the SQL query entered as:
    from Name where Name.COMPANY = 'Prodigy Makers International'
11. The Maximum Discussion Topic Age is the number of days after a topic is posted that the topic and comments will display in the View Discussion Topic page. After the maximum number of days is met, the topic and comments are archived and can be viewed by an administrator.
12. Click submit.
13. A message indicating that the community was created successfully displays.
14. Click OK.

    Note: A system error displays if the SQL criteria is not correct.

    To edit or delete a community

- Editing a community updates the properties of the community.

  Note: When you change the properties, you may be changing the community's membership. If a current member does not meet the criteria defined by the new properties, that member will be excluded, unless the member is a member of the Administrator security group.

- Deleting a community removes all archived documents, discussion forums, and news items. However, a community's corresponding folder in Customer\StaticContent\CmtyStorage is not deleted when the community is deleted.

  Note: Deleting a community does not delete the community's corresponding folder from the CmtyStorage directory.

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.

4. (optional) Click the View Type drop-down list and select the type of communities you want to display.
5. Choose to edit or delete the community.

- To edit, click Edit on the same line that corresponds to the community you want to modify. The Edit Community page displays.
- To delete, click Delete on the same line that corresponds to the community you want to delete. A system message prompts you to verify the deletion of the community.

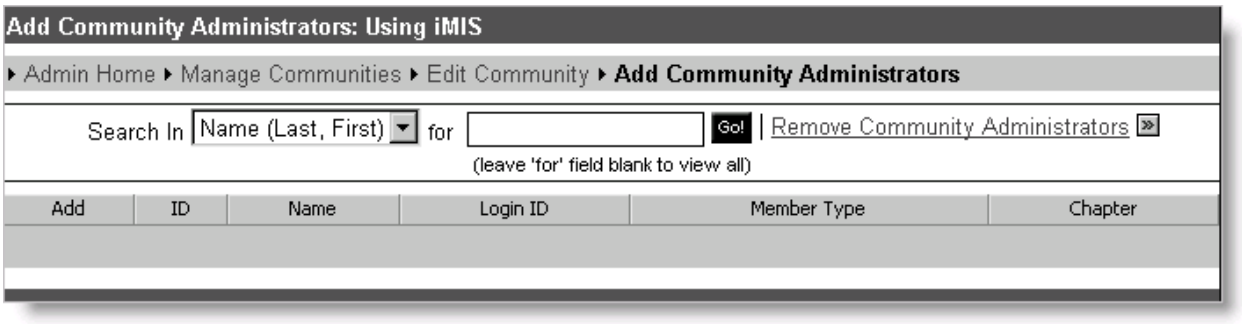
6. Click Edit Community Properties to change the properties of the community. All fields are pre-filled with the current settings.
7. Modify the properties.
8. Click submit. A message indicating the community was updated successfully displays.
9. Click OK.

To add administrators to a Community

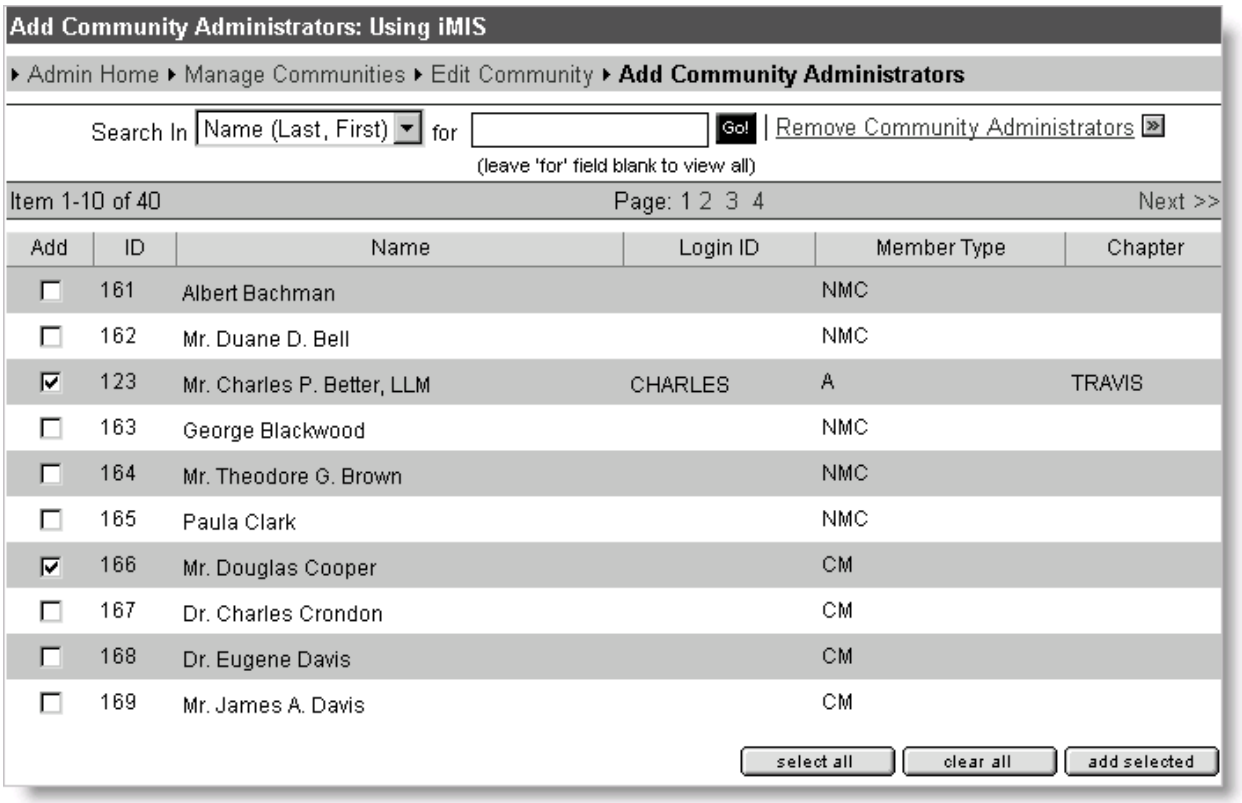
A web login and password must be created for the user before they can log in as a community administrator. Refer to Assigning Security Logins and Passwords (see "Assigning Security Logins and Passwords for e-Series").

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community. The Edit Community page displays.
5. Click Add Community Administrators.
6. Click the Search In drop-down list and select Name (Last, First), ID, Member Type, or Chapter.

7. (optional) Press Tab and enter specific information you want to search for based on the Search In selection. Leave the field blank to view all records.
8. Click Go. A list of members fitting the search criteria displays on the page.
9. Click the Add checkbox that corresponds to the member(s) you want to add as an administrator or click select all to include all members listed.
10. Click add selected.



Add Community Administrators: Using iMIS



Add Community Administrators list

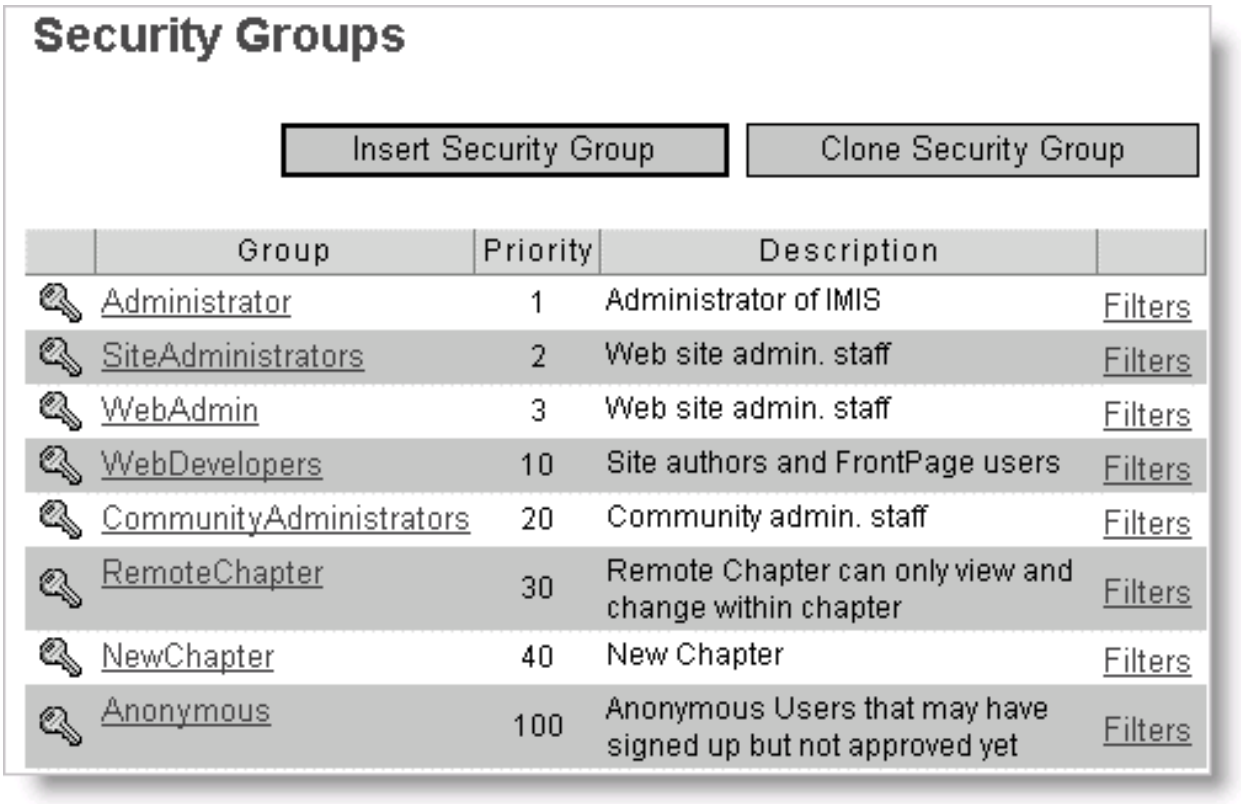
To remove administrators from a Community

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community. The Edit Community page displays.
5. Click Remove Community Administrators.
6. Click the Remove checkbox that corresponds to the member(s) you want to remove as an administrator.
7. Click remove selected.

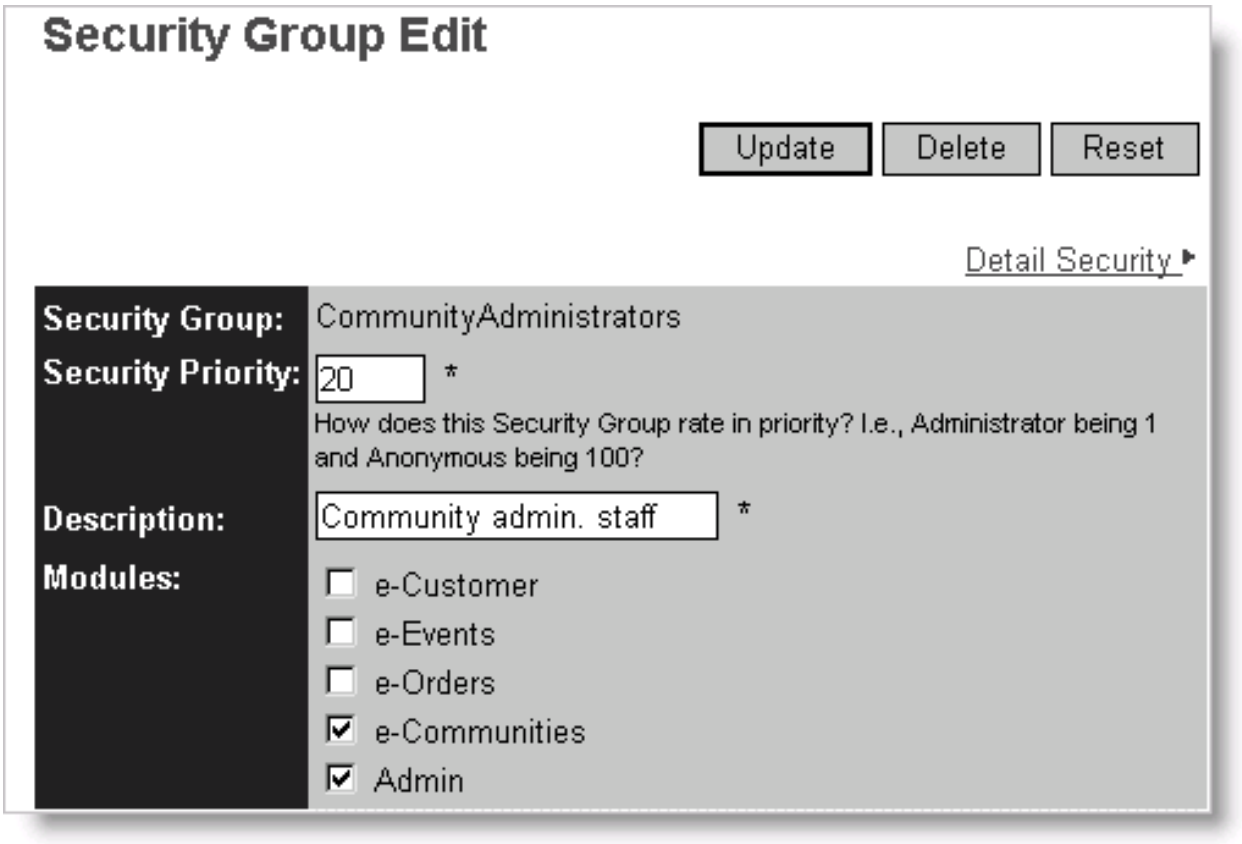
To enable e-Communities for Security Groups

A user will not be able to access e-Communities unless e-Communities is enabled for the security group to which they are assigned.

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Security in the side index to display the Security Groups page.
4. Click the security group name for which you want to enable the e-Communities module.
5. Enable the e-Communities option.
6. Click Update.
7. Click OK.



Security Groups list



Security Group Edit page

Managing community email lists

To simplify managing email lists, an email list management software solution is required. This software is capable of disseminating a single message simultaneously to a group of people and performs several functions that would otherwise have to be managed manually.

Note: If you simply want to use e-Communities as an online forum, you do not need LISTSERV.

e-Communities uses a process that is similar to, but less complicated and more automated, the one described above. e-Communities dynamically creates its own email list from the subscribed users who have set their preferences to send email. This list is then sent to ColdFusion. ColdFusion processes according to the schedule you have defined in the Add/Edit Schedule Task page and the schedule the users have defined in their Global

Preferences page. Depending on the schedule you have set in ColdFusion, the list of users is sent to the email list management software solution (LISTSERV). LISTSERV then distributes the emails to the subscribed users.

The email list management software supported by the e-Communities module is L Soft's LISTSERV (http://www.lsoft.com/)® . LISTSERV is a separate software application that must be purchased separately from L-Soft. L-Soft will determine which version of LISTSERV is required for your organization.

Using LISTSERV with e-Communities

The following list provides some basic information about using LISTSERV with iMIS e-Communities.

- All subscriber information is maintained in the iMIS database.
- All subscribe and un-subscribe operations are handled via the iMIS e-Series web interface.
- The LISTSERV world wide web interface is not used with e-Communities.
- There are no LISTSERV lists per se. All lists are maintained in the iMIS database.

Creating private and public respond email addresses

You can specify a From address for e-Communities email messages that is different than the From address that appears on notifications you send to LISTSERV. The LISTSERV-directed From address is private, keeping these operation more secure.

- The From address for e-Communities email corresponds to the value in the LISTSERV Public Respond Email Address field of the System Parameters page. To display the System Parameters page, go to the Admin area of your e-Series website, then select System Parameters on the Lookup Lists page (see "Setup for LISTSERV addresses for e-Communities").
- The From address for LISTSERV-directed email corresponds to the value in the LISTSERV Private Respond Email Address field.

  If you do not enter a LISTSERV Public Respond Email Address value, the From address field for e-Communities email is blank.

Note: A blank or poorly specified From field can cause email to be rejected by filtering software at the recipient's site.

Separate address for bounced email notifications

You can send bounced email notifications to a separate address. This address is specified in the LISTSERV Bounced Address field on the System Parameters page. If you do not enter a value for this field, the LISTSERV Public Respond Address is used for returning bounced emails.

To set up LISTSERV for e-Communities

Several steps are required in setting up LISTSERV for e-communities. The basic setup procedure is dependent upon the parameters established by L-Soft.

1. Configure and install L-Soft's LISTSERV software in accordance with their installation instructions and guidelines.

   Note: Make sure the DIST_ALLOWED_USERS address in LISTSERV matches the address entered in the 'From' Email Address field of the e-Communities System Parameters page (Admin> Lookups> System Parameters> e-Communities). See Set up the

- Refer to L Soft's documentation (http://www.lsoft.-com/products/default.asp?item=manuals). The specific documentation needed for setting up e-Series with LISTSERV is in the LISTSERV for Windows NT Installation Guide (http://www.lsoft.com/manuals/1.8d/ntinst.html) and the LISTSERV Site Manager's Manual (http://www.lsoft.com/manuals/1.8d/siteindex.html).

2. Verify that the LISTSERV configuration is set up correctly by sending an email to LISTSERV. The address fields can be found in the e (see "Setup for LISTSERV addresses for e-Communities")-Communities System Parameters page (see "Setup for LISTSERV addresses for e-Communities"). (Admin> Lookups> System Parameters> e-Communities).

   If LISTSERV was installed correctly, LISTSERV will send you their most commonly used commands.

1. Register the Distribute password by sending an email to LISTSERV with the email fields populated with the following information:

- To: address shown as the LISTSERV address that was set when you installed LISTSERV. For example, LISTSERV@advsol.com (mailto:listserv@advsol.com).
- From: address shown as the address from where email for the community will be sent. For example, cmmty1@imis.com (mailto:cmmty1@imis.com).
- Subject: (Optional, can be blank) PW ADD Password.
- Body: PW ADD Password
  where Password is the password set in LISTSERV - must match the password entered in the Distribute Password field of the e-Communities System Parameters page (Admin> Lookups> System Parameters> e-Communities).
- LISTSERV will send an email with the subject shown as Command confirmation request with a request for you to “Reply to add password command from listserv.” Click Reply.
- After you reply, LISTSERV will send an email indicating that your new password was registered successfully.

2. Schedule email notifications in e-Communities. .
3. Schedule email notifications in ColdFusion. -.

   LISTSERV Fully Qualified Domain Name (FQDN) for firewalls

   You can setup LISTSERV behind a firewall, but you must use a FQDN. LISTSERV will not run under IP address only. The Mail Server (LSMTP or other) needs a Public FQDN and access to the internet through a firewall.

   To add permissions to the registry to support LISTSERV automated emailing

   Make sure you have secured the ColdFusion Service before you change the following registry key. Refer to the e-Series Guide (Implementation - Securing the ColdFusion Service) for detailed instructions.

The registry is updated every time the ColdFusion Scheduler sends out e-mail notifications; therefore, the CF_Customer needs to have full rights/permissions added to the e-Series registry key. - Emails will not be sent unless CF_Customer has appropriate permissions.

1. Using regedt32, navigate to the following registry key: HKEY_LOCAL_MACHINE\SOFTWARE\Advanced Solutions International\iMIS eSeries.
2. Select Security> Permissions to open the Permissions window.
3. Click Add to open the Add Users and Groups window
4. Click Show Users.
5. Select CF_CUSTOMER from the list of users.
6. Click Add and return to Permissions window. CF_Customer now displays in the window.
7. Enable the Replace Permission on Existing Subkeys option.
8. Select CF_Customer (ColdFusion Customer) and select Full Control privileges to the iMIS eSeries registry key for the CF_Customer.

Managing Community Email Notification Capabilities

The e-Communities module of e-Series allows you to implement email notification capabilities. These capabilities include the ability to integrate and set up a third-party email list management application (LISTSERV) and schedule email notification. E-mail notification processing is based on parameters that both the Administrator and user have defined and applies to:

- News items
- Discussion posts

e-Series administrators have the ability to define parameters used in processing email notification. These parameters interact directly with the parameters the user has established in the Global Preferences page.

Administrators can configure the exact time and day email processing occurs by setting the email Notification hour and email Notification week day in the System Parameters page. The following are the types of email processing the administrator can schedule:

Each - Processes each time the cmtyEmail.cfm is called for each community news item and discussion post. The processing time is defined in ColdFusion, and can occur as often as once every minute.

Tip: We recommend setting Each processing to run once every 15 minutes.

Daily - Processes at a specified time during the day for each community news item and discussion post. Daily processing is defined in the e-Communities page of System Parameters, and occurs at a specified time of the day.

Weekly - Processes on a specified day and time during the week for each community news item and discussion post. Weekly processing is defined in the e-Communities page of System Parameters, and occurs at a specified time on a specified day in the week.

Note: A Registry Time Stamps option has been added to the AppWiz with the default set to No. If you select Yes, existing time stamps will be overwritten and discussion or news items created since the last notification will not be sent.

To schedule email notifications in System Parameters

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Click e-Communities to display the e-Communities System Parameters page.
6. Enable the Email Notifications option to be able to notify Community members through e-mail.

- This option is disabled by default because LISTSERV must be installed to use this option.
- Failure to enable the option results in no e-mail being sent when using LISTSERV.

7. Enter the 'From' Email Address that will be shown as the “from,” or return, address on all e-mail sent from e-Communities to Community members.

   Note: Distribute permissions must be granted in LISTSERV for this address. This is the same “from” address used by LISTSERV and must be entered exactly the same in both System Parameters and LISTSERV.

8. Enter the LISTSERV Address that will be used to send jobs to LISTSERV. This is the actual e-mail address of LISTSERV.
9. Enter the LISTSERV Distribute Password that matches the password set in LISTSERV. This password will be used by LISTSERV to determine if documents received are from a valid distributed user.
10. Enable the appropriate Email Contents option.
    - Enable the Full Content of Posts option if you want e-mails to contain full contents of posts.
    - Enable the Summary of Posts option if you want e-mails to contain a summary of each post made.
11. Click the Notification hour drop-down list and select the time of day when both daily and weekly e-mail notifications are processed.

    Tip: Setting this to a time at night when activity is lower is recommended.

12. Click the Notification week day drop-down list and select the day of the week when weekly notifications are processed.
13. Click Update. A message displays confirming that the system parameter information updated successfully.
14. Click OK to return to the Lookup Lists page.
15. Click Update System Variables.
16. Click OK.

Note: You must click both the Update button on the System Parameters page and the Update System Variables button on the Lookup Lists page for the changes to the system to take place.

Scheduling Email Notifications for ColdFusion

The e-Series Application Wizard sets up email notification tasks employing the ColdFusion Administrator. You can also schedule e-Community email notifications using the Scheduled Tasks feature in the ColdFusion Administrator, instead of the wizard. Refer to ColdFusion help for instructions on how to find and edit these tasks.

- To change email notifications using ColdFusion Administrator, enter the path to .../Source/communities/cmtyemail.cfm.

Managing Community News Items

Community administrators can post news items that are relevant to a community. A news item is sorted by status (Active or Archive) and by priority (Hot or Normal). A news item can be typed into a text input field or a file (HTM, HTML, or TXT) can be uploaded.

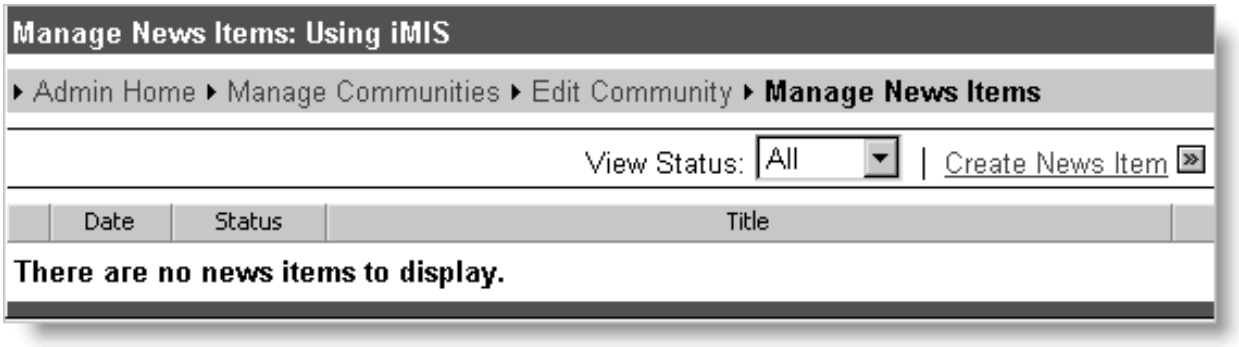
To add news items

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are adding a news item. The Edit Community page displays.
5. Click Manage News Items.
6. Click Create News Item.
7. Enter the Title of the news item.
8. Click the Priority drop-down list and select:

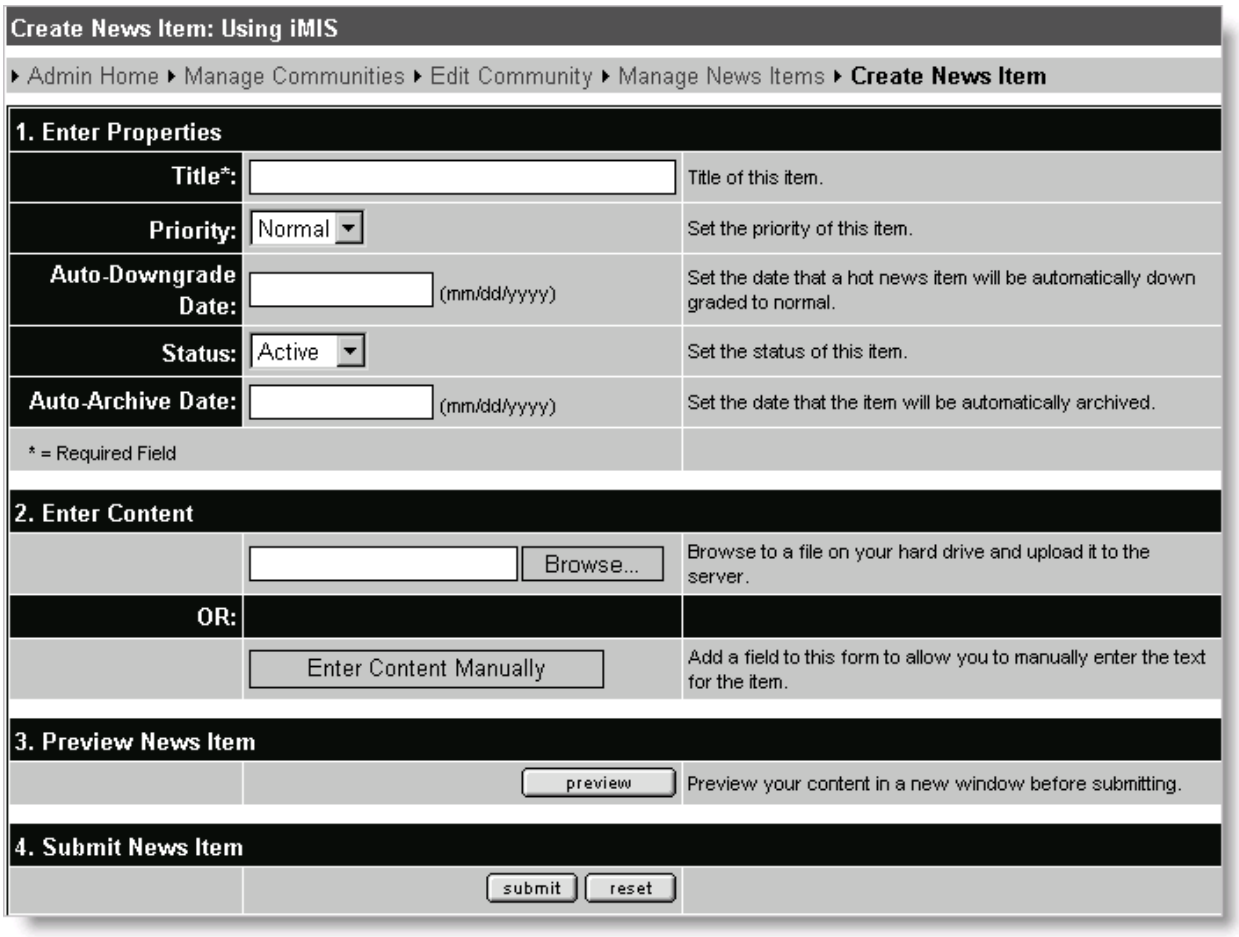
- Normal or
- Hot (a red flag graphic will display on the User Home Page)

9. Enter the Auto-Downgrade Date that the priority for a hot news item should be automatically changed to normal.
10. Click the Status drop-down list and select Active.
11. Enter the Auto-Archive Date when you want the news item to be automatically archived.
12. Enter the news item content.
    - Click the Browse button to locate the file containing the news item. Valid file types are HTM, HTML, or TXT.
      OR
    - Click Enter Content Manually to type or paste the contents. An input text box displays where you can enter or paste the text.

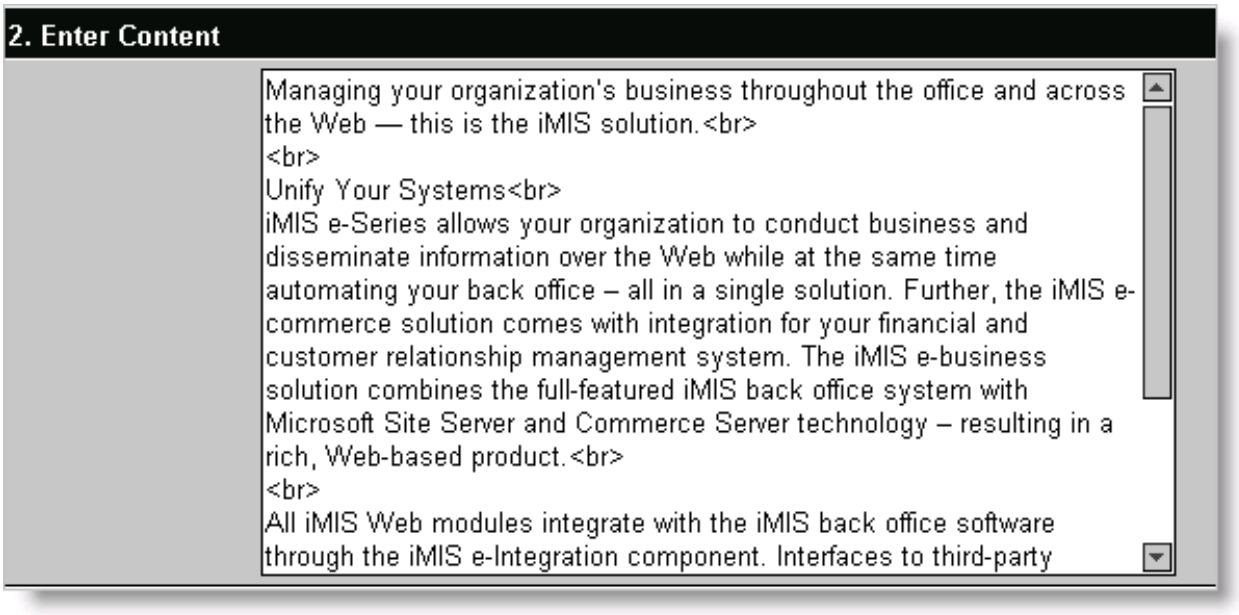
      Note: If you want line breaks to separate paragraphs, make sure to enter <br> to indicate an HTML line break.
13. Click preview. The news item displays in a separate browser window.
14. Click submit when you have completed entering the news item properties.
15. A message indicating the news item was created successfully displays. Click OK.



Manage News Items: Using iMIS page



Create News Items: Using iMIS page



Enter Content page

To add news items with images

A news item can contain images. However, the image is not included in the HTML file until you:

- Copy or upload the image to your server,
- Modify the HTML to include the correct path of the image on your server, and
- Add the HTML file as a news item

1. Copy the image file to your server or use the following procedures to upload the image with e-Series:

   Note: If you upload an image, make sure the image size does not exceed 10 MB. You may encounter difficulty or errors when trying to upload larger files.

- Log in to your e-Series site as an administrator.
- Click Admin> File Upload in the side index to display the File Upload page.
- Click the File Destination drop-down list and select StaticContent--Images.
- Click Browse, navigate to the directory, and select the image file.
- Click Send File to Server. A system message indicating the file was uploaded displays. Click OK.

2. Modify the HTML file to include the URL address where the image was copied or uploaded. For example, http://<your server>/<your site name>/StaticContent/Images/<image file>.

- If you are using Microsoft Word to modify the HTML file, remove the current image. Select Insert> Picture> From File and enter the http address in the File name field. Click the drop-down arrow next to the Insert button and select Link to File. Save your document as an HTML file.

- If you are using Microsoft FrontPage to modify the HTML file, remove the current image. Select Insert> Picture> From File and enter the http address in the URL field. Click OK. Save your document.

3. Add the news item:

- Log in to your e-Series site as an administrator.
- Click Communities in the top navigation bar.
- Click Communities> Manage in the side index to display the Manage Communities page.
- Click Edit on the same line that corresponds to the community for which you are adding a news item. The Edit Community page displays.
- Click Manage News Items.
- Click Create News Item.
- Enter the Title of the news item.
- Click the Priority drop-down list and select Normal or Hot.
- Enter the Auto-Downgrade Date that the priority for a hot news item should be automatically changed to normal.
- Click the Status drop-down list and select Active.
- Enter the Auto-Archive Date when you want the news item to be automatically archived.
- Click the Browse button to locate the HTML file containing the news item.
- Click preview. The news item displays in a separate browser window.
- Click submit when you have completed entering the news item properties.
- A message indicating the news item was created successfully displays. Click OK.

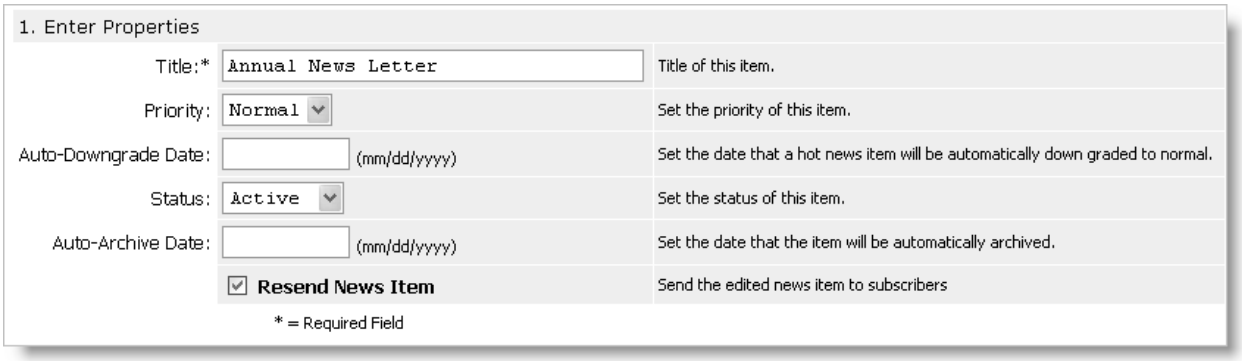
4. Go to the Community Home Page and select the news item. The news item displays on the page.

   To edit news items

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are editing a news item. The Edit Community page displays.
5. Click Manage News Items.
6. Click Edit on the same line that corresponds to the news item you are editing. The Edit News Item page displays with all fields pre-filled with the current settings.

- If the Priority is changed from Normal to Hot (or from Hot to Normal), the Auto-Downgrade Date automatically clears.
- If the Status is changed from Archived to Active, the Auto-Archive Date automatically clears. The date of the news item is reset only if the news item content is changed.

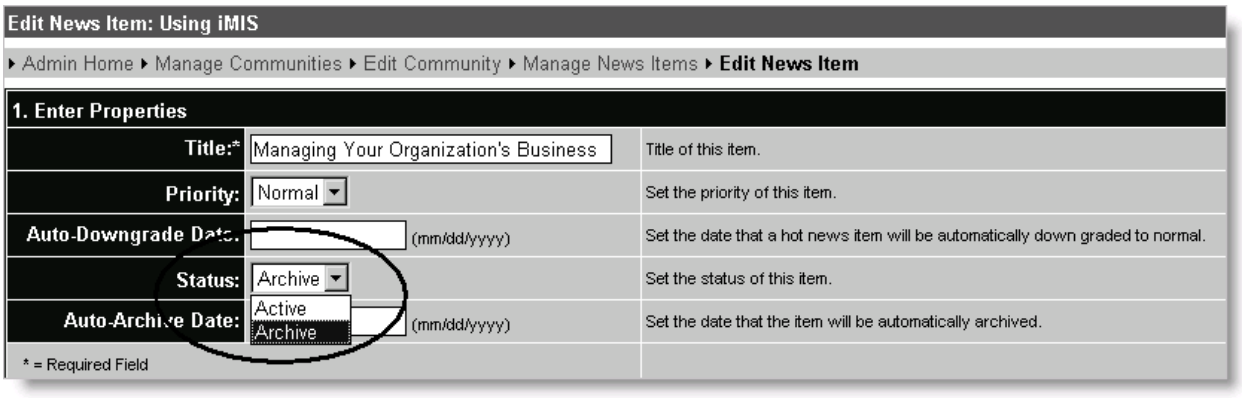
7. Select Resend News Item, if you want to notify the members of the change.
8. Make the necessary changes.
9. Click submit. A message indicating the news item was updated successfully displays.
10. Click OK.



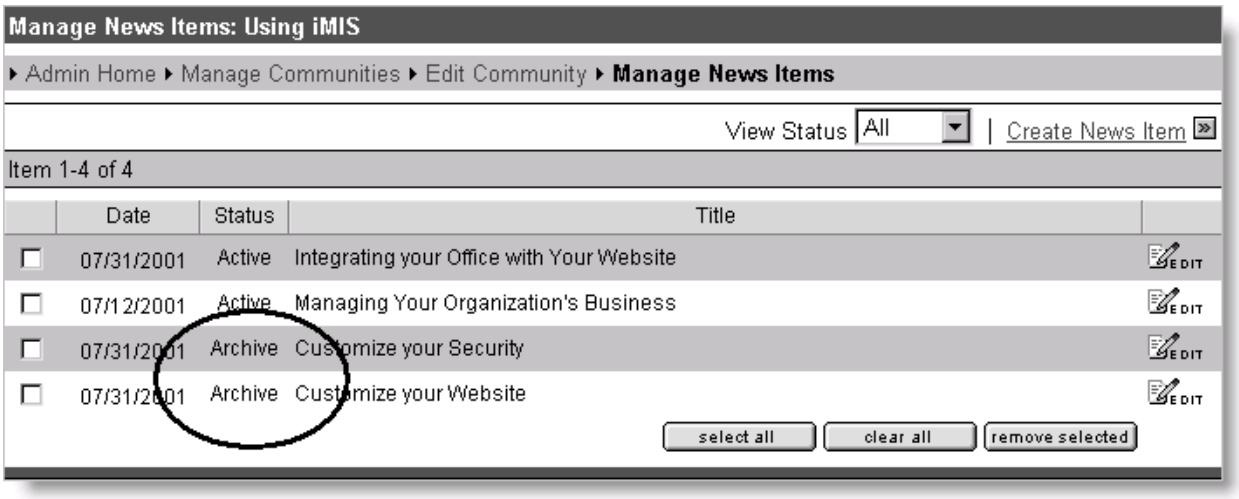
Select Resend News Item option

To archive news items

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are archiving a news item. The Edit Community page displays.
5. Click Manage News Items.
6. Click Edit on the same line that corresponds to the news item you want to archive.
7. Click the Status drop-down list and select Archive.
8. Click submit. A message indicating the news item was updated successfully displays.
9. Click OK. The status of the news item is updated on the Manage News Items page.



Archive status



New status in list of news items

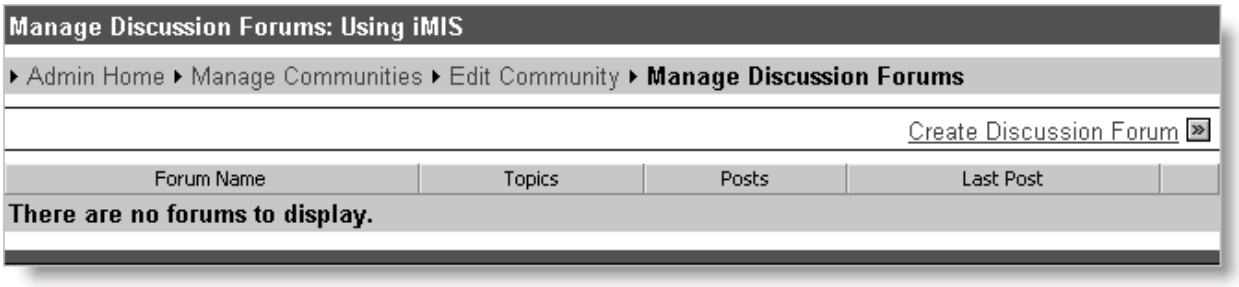
Managing Community Discussion Forums

A forum is a public meeting place where discussions can be held. An administrator creates the forums to which users can later add discussion topics.

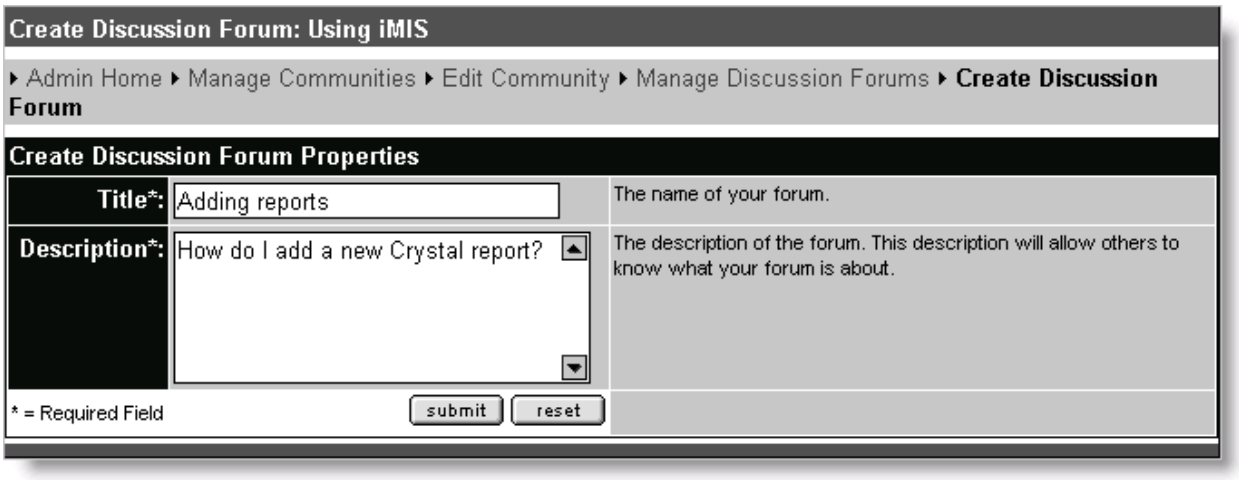
To create discussion forums

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you want to add a discussion forum. The Edit Community page displays.
5. Click Manage Discussion Forums.
6. Click Create Discussion Forum.
7. Enter the Title of the forum.
8. Enter a Description of the forum.

9. Click submit.
10. A message indicating the forum was created successfully displays. Click OK.



Manage Discussion Forums: Using iMIS page



Create Discussion Forum: Using iMIS page

To edit a discussion forum

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community that contains the discussion forum you want to edit. The Edit Community page displays.
5. Click Manage Discussion Forums.

6. Click Edit on the same line that corresponds to the forum you want to edit.
7. Modify the Title or the Description.
8. Click submit.

To delete a discussion forum

When you delete a forum, all discussions posted to the forum are also deleted.

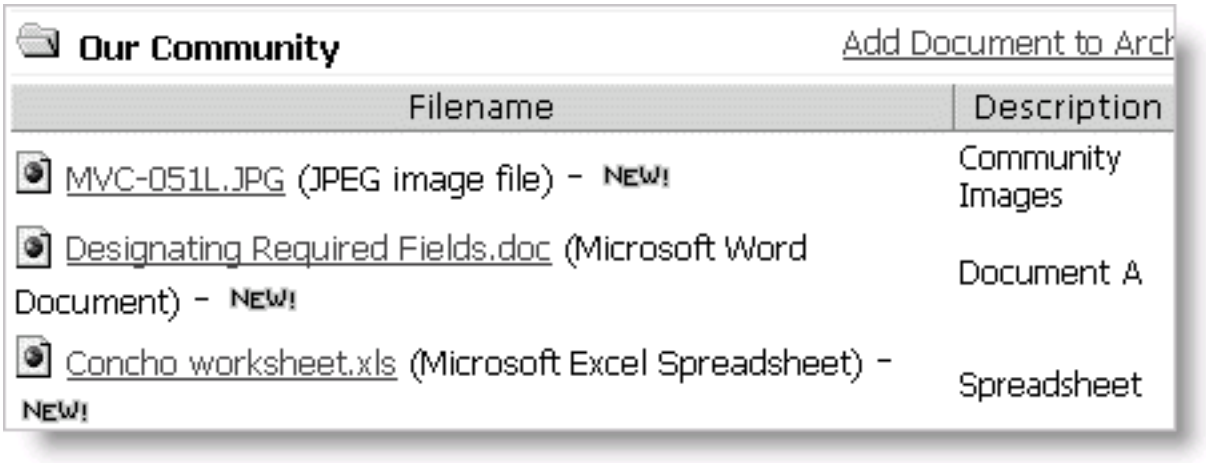
1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community that contains the discussion forum you want to delete. The Edit Community page displays.
5. Click Manage Discussion Forums.
6. Click Delete on the same line that corresponds to the forum you want to delete. A system message prompts you to verify the deletion of the forum.
7. Click OK to delete the forum.

Managing Documents

The Document Archive area of e-Communities enables visitors to view and contribute or download shared documents. The Document Archive displays a document's title followed by the document's type shown in parentheses. For example, a file named My Document.doc will display as My Document.doc (Microsoft Word document).

e-Communities Administrators can modify and add to the list of file type extensions and descriptions recognized by e-Series. This list is located in the eCommunitiesConfig.txt file on the Module Config Files page (select Admin> Style Form, and select Edit Config Files). The application variable (Application.Communities.EditDocProperties.ExtDescriptions) contains a file type's display value as well as the corresponding file extension.

If a file contains an extension value that is not listed in the application variable (or a file does not contain an extension), then e-Communities displays the file with no description.



Example of several document types displayed in a community's View Document Archive

Note: If SSL is enabled for e-Communities, users will not be able to right-click a document in the Document Archive and use the Save As function to save the document. For security, HTTPS (SSL) does not permit caching data on the server. Disable HTTPS for e-Communities if you want end users to be able to right-click on a link to save a document.

To upload or replace a document

When uploading a document, make sure the document size does not exceed 10 MB. You may encounter difficulty or errors when trying to upload larger files. Adding additional physical RAM to the server may help alleviate this problem.

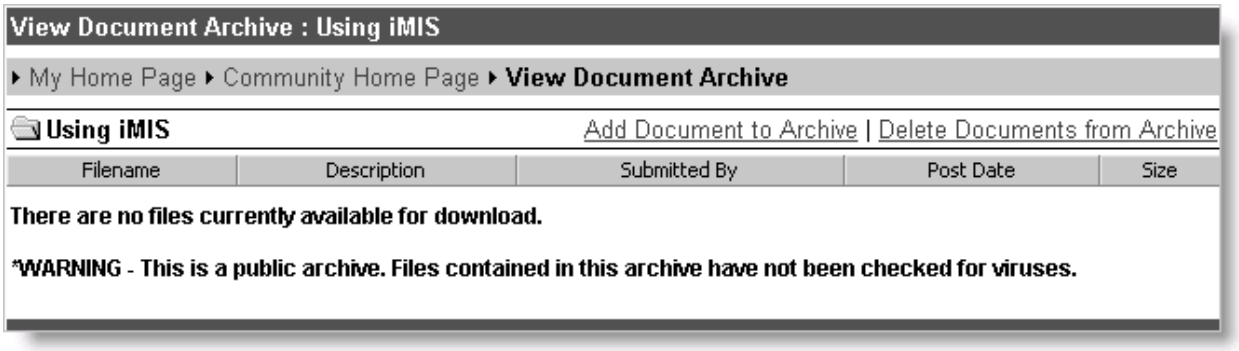
In addition, loading large documents requires the same amount of memory on the ColdFusion server. For example, uploading a 50 MB file will require that 50 MB of memory be available to ColdFusion.

If you want to allow non-administrative users to upload documents, be sure and enable the Non-Community Administrator Uploads option in the e-Communities System Parameters.

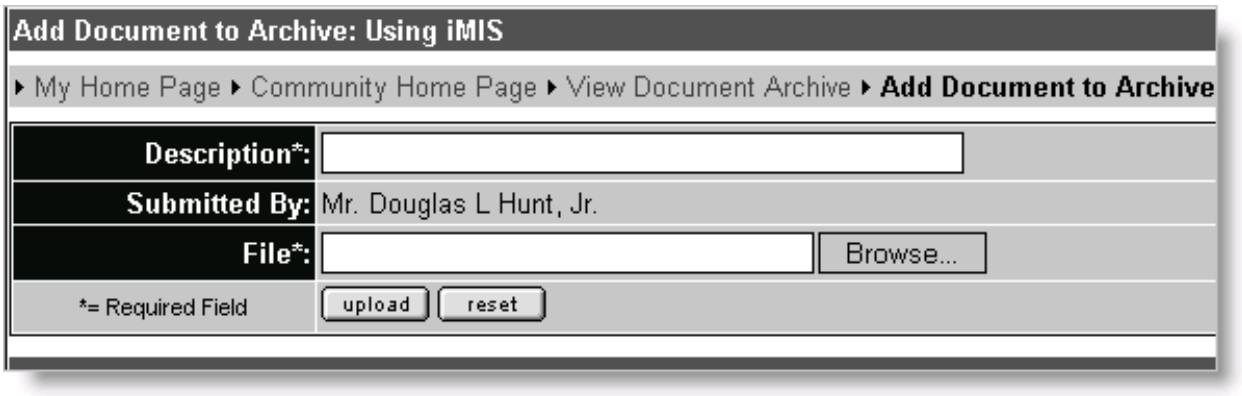
Authorized users also can upload a new copy of an existing file to the Document Archive without first having to delete the original version. When an authorized user uploads a new file, and the uploaded file's name is identical to a file already in the Document Archive folder, e-Communities prompts the user to verify replacing the older file with the new one:

- Replace the original file - e-Communities deletes the original file and saves the new file in the same location.
- Do not replace the original file - e-Communities terminates the upload, and you will need to rename the file before attempting to upload the file again.

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to display the Community Home Page.
4. Click View complete document archive.
5. Click Add Document to Archive.
6. Enter a Description for the document.
7. Click Browse to locate the file.
8. Click upload.
9. (optional) If uploading a new copy of an existing file, click OK to overwrite the existing file.



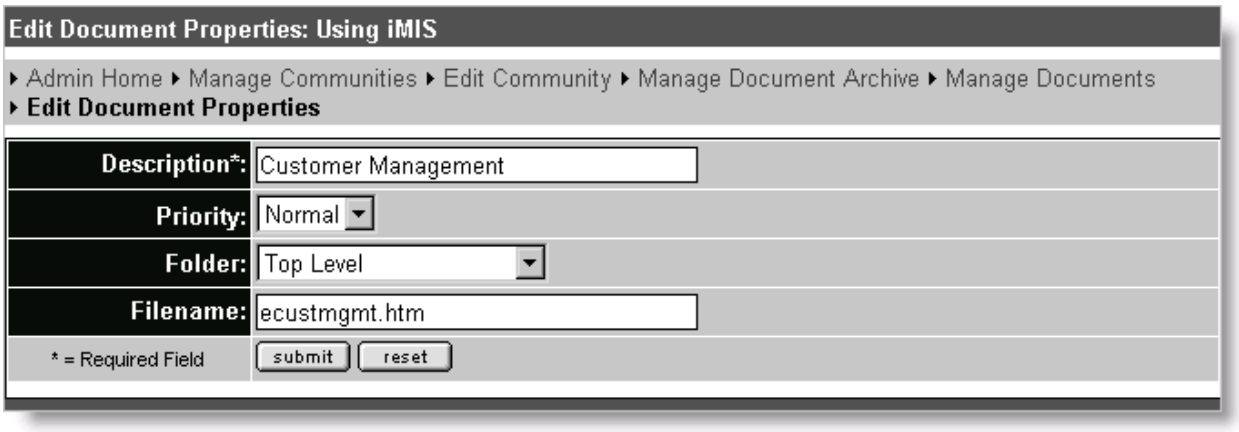
View Document Archive: Using iMIS page



Add Document to Archive: Using iMIS page

To modify document properties

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are adding a news item. The Edit Community page displays.
5. Click Manage Documents.
6. Click Edit on the same line that corresponds to the appropriate document.
7. Change the Description, if necessary.
8. Click the Priority drop-down list and select Normal or Hot.
9. Click the Folder drop-down list and select the folder in which you want the document placed.
10. Modify the file name, if necessary.
11. Click submit. A message appears stating that the properties were updated successfully.
12. Click OK.

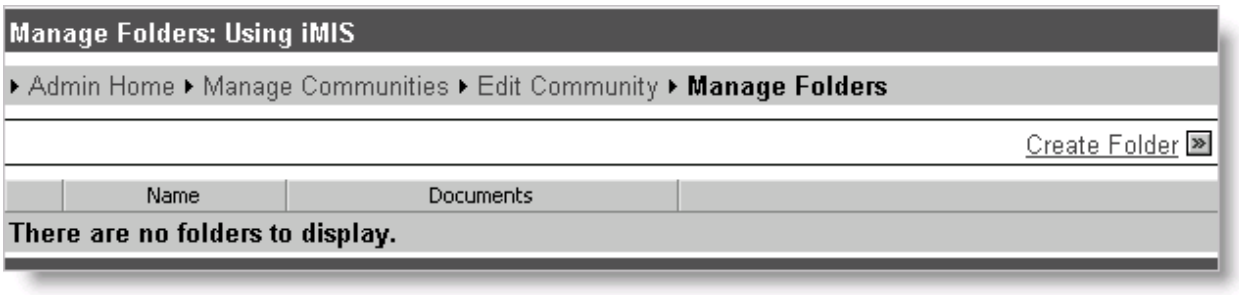


Edit Document Properties: Using iMIS page

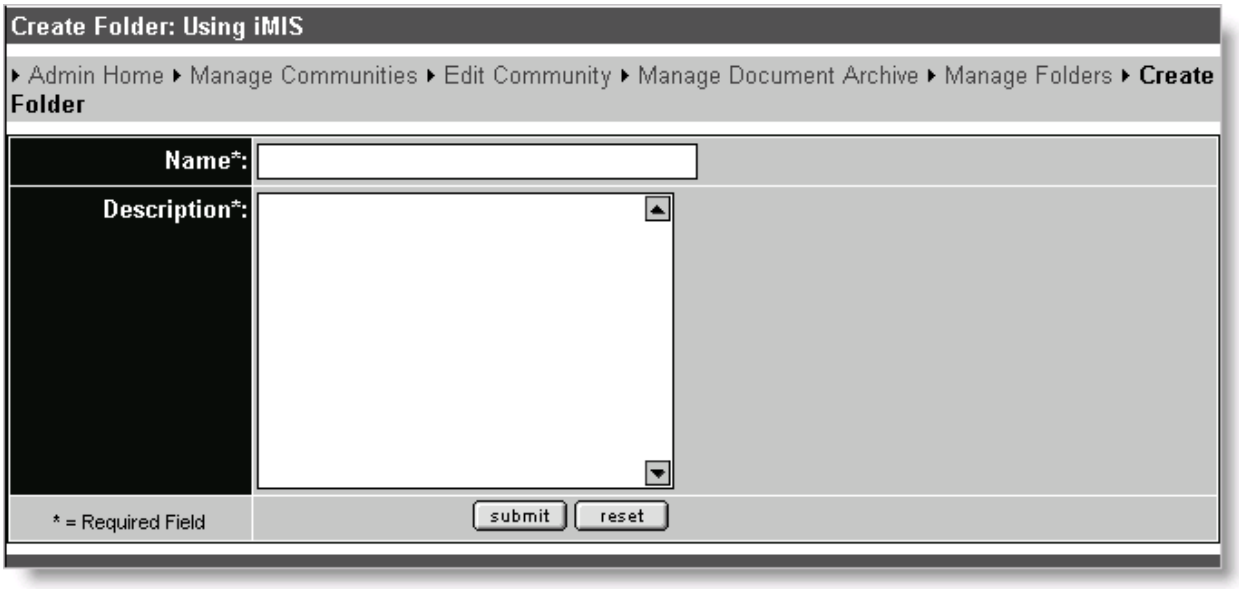
To create a document folder

You can use folders to help organize documents. To avoid problems accessing the folders, create your e-Series document folders as an administrator from e-Series. Do not change or add the folders from the Microsoft operating system.

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are adding a news item. The Edit Community page displays.
5. Click Manage Folders.
6. Click Create Folder.
7. Enter the Name of the folder.
8. Enter a Description of the folder.
9. Click submit. A message appears that the Document Archive Folder was created successfully.
10. Click OK.



Manage Folders: Using iMIS page



Create Folder: Using iMIS

To modify a document folder

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are adding a news item. The Edit Community page displays.
5. Click Manage Folders.

6. Click Edit on the same line that corresponds to the folder you want to modify.
7. Modify the folder properties.
8. Click submit. A message appears that the Folder Properties were updated successfully.
9. Click OK.

To create a hierarchical folder structure

e-Communities allows administrators to set up a multi-tiered, hierarchical folder structure for the Document Archive of a community. Authorized administrators can add sub-folders as necessary using standard naming conventions.

No limit exists to the number of nested subfolders you can create. However, folders in the same parent directory cannot have the same name, and files in the same folder cannot have the same name.

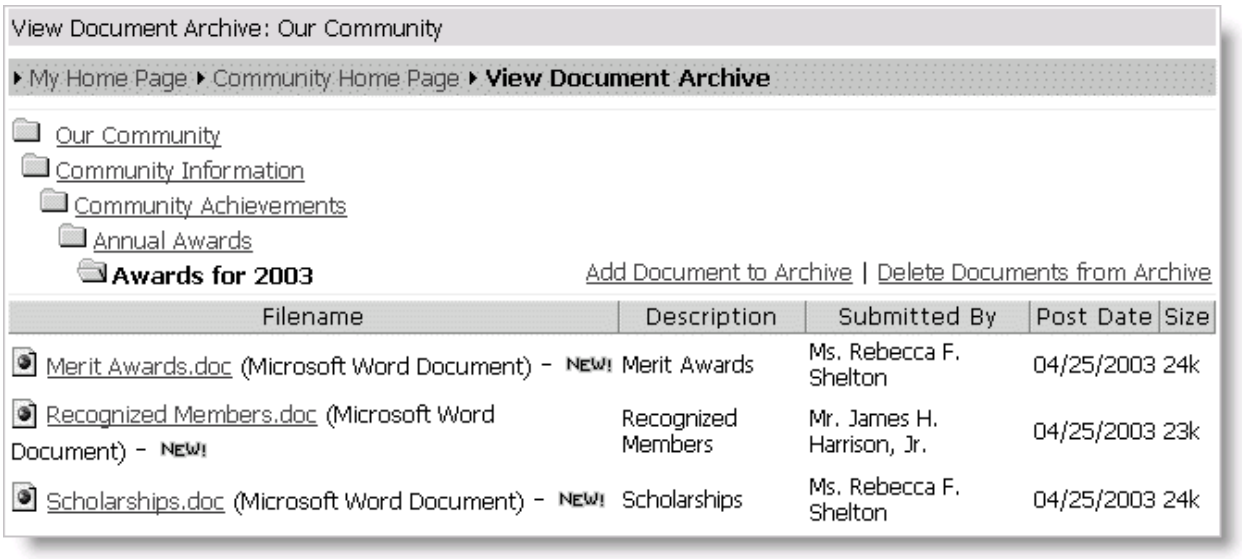
1. Log in to your e-Series site as an administrator.
2. Open the Manage Folders page:

- Select Communities> Manage to display the Manage Communities page.
- Select Edit for the community in which you want to create hierarchical folders to display the Edit Community page.
- Select Manage Folders to display the Manage Folders page.

3. Select an existing folder to display that folder's instance of the Manage Folders page.
4. Create a subfolder:

- Select Create Folder to display the Create Folder page.
- Enter a Name and Description for the folder.
- Click submit to return to the parent folder's instance of the Manage Folders page.

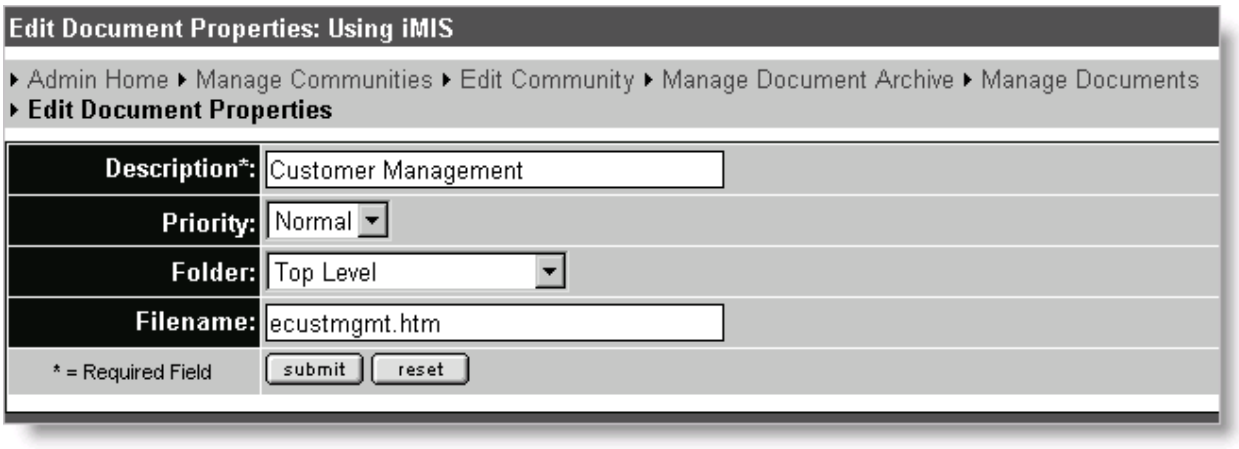
5. Create additional subfolders if needed.



Example of a hierarchical subfolder and its files

To place documents into a folder

1. Log in to your e-Series site as an administrator or as a community administrator.
2. Select Communities in the top navigation bar.
3. Select Communities> Manage in the side index to display the Manage Communities page.
4. Click Edit on the same line that corresponds to the community for which you are adding a document. The Edit Community page displays.
5. Click Manage Documents.
6. On the Manage Documents window, click Edit on the same line that corresponds to the appropriate document.
7. On the Edit Document Properties window, click the Folder drop-down list and select the folder in which you want the document placed.
8. Click submit.



Edit Document Properties: Using iMIS page

To delete a document from the archive

Only the person who uploaded the document to the community or an administrator can delete a document. Use the procedures shown under step 1 if you are the person who uploaded the document. Use the procedures shown under step 2 if you are an administrator.

Use the following steps to delete a document from the archive if you are the person who uploaded the document:

1. Log in to your e-Series site.
2. Select Communities in the top navigation bar.
3. Click the appropriate community to display the Community Home Page.
4. Click View complete document archive.

- If the document is listed in the top half of this page, click Delete Documents from Archive. If the document is listed in a folder, click the folder to open the View Document Folder page, then click Delete Documents from Archive. The Delete Documents from Archive page displays.

5. Click delete on the same line that corresponds to the document you want to delete. A system message prompts you to verify the deletion of the document.

6. Click OK to remove the document from the Document Archive. The file no longer displays in the Document Archive, but still exists and can be uploaded later.

   To delete a document from the archive as an administrator

   Use the following steps to delete a document from the archive if you are an administrator.

1. Click Admin in the top navigation bar.
2. Click Admin> Communities in the side index to display the Manage Communities page.
3. Click Edit on the same line that corresponds to the community for which you are adding a news item. The Edit Community page displays.
4. Click Manage Documents.
5. Click the checkbox located to the left of the document to select the document you want to delete.
6. Click remove selected.
7. A message indicating the document was deleted successfully displays. Click OK.

Setting up Verity Indexing

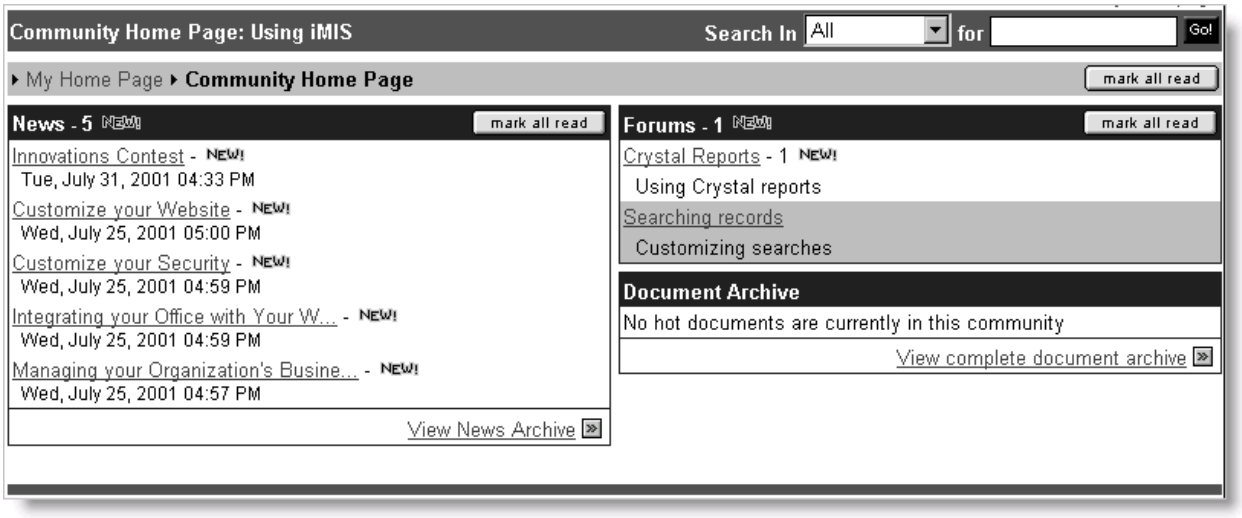
During setup, Verity indexes data into a collection. This collection is a set of files that represents a group of files optimized for searching. The specific information stored in this collection includes the following:

- Various word indexes
- An internal documents table containing document field information
- Pointers to the actual document files for file and path indexes

When the Communities collection is created, the storage location is server:\e-Series\Customer\StaticContent\, and the default collection name is CmtyStorage_Index.

Once the CmtyStorage_Index collection is created, it will be populated from shared files, news items, and discussions added through e-Communities.

The community search fields will be available only if the CmtyStorage directory is indexed by Verity and the CmtyStorage_Index directory is created successfully. If the CmtyStorage_Index directory is not created successfully, the community search fields will not be available in the Community Home Page.



Sample Community Home Page with the community search fields available

If the CmtyStorage_Index collection is deleted from the ColdFusion Administrator interface or the e-Series Verity interface, or, if the CmtyStorage_Index directory is deleted from the file system, the search fields will not be available to use for searching.

To create the CmtyStorage_Index directory

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Click e-Communities to open the Communities page.
6. Click Verity Indexing to open the Collection Actions page.
7. Click Create from the top menu to create the CmtyStorage_Index directory.

- Verity automatically creates the CmtyStorage_Index directory.
- Once created, the CmtyStorage_Index directory populates from shared files, news items, and discussions added through e-Communities.

8. Verify that the CmtyStorage_Index was created by looking at the Last action in the Collection Actions page.

   Note: If the CmtyStorage_Index directory is not created successfully, the community search fields will not be available in the Community Home Page.

Maintaining Verity Indexing

The maintenance requirements of a Verity collection are dictated by the amount, frequency, and type of changes that occur in the records. When site activity is high and users are making frequent and voluminous changes to data, such as posting new documents and discussion comments, maintenance requirements increase.

Perform the following maintenance tasks to maintain data integrity within the CmtyStorage_Index directory and to ensure Verity Indexing of e-Communities functions efficiently:

- Update
- Refresh
- Repair
- Optimize
- Delete

To update the CmtyStorage_Index directory

Updating the CmtyStorage_Index directory performs two functions:

- The collection is repopulated with changed and/or new records
- A key is added if one is not part of the collection

Note: Updating the CmtyStorage_Index directory does not delete records that have been deleted from the data source.

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Communities to open the Communities page.
6. Click Verity Indexing to open the Collection Actions page.
7. Click Update to update the CmtyStorage_Index directory.

To refresh the CmtyStorage_Index directory

Refreshing the CmtyStorage_Index directory deletes all of the data and re-populates the collection.

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Communities to open the Communities page.
6. Click Verity Indexing to open the Collection Actions page.
7. Click Refresh to refresh the CmtyStorage_Index directory.

To repair the CmtyStorage_Index directory

Repairing the CmtyStorage_Index runs internal Verity routines that fix corrupted records.

Note: If you suspect a collection has become corrupted, it is probably safest to delete and then recreate it.

1. Log in to the e-Series site as an administrator.

2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Communities to open the Communities page.
6. Click Verity Indexing to open the Collection Actions page.
7. Click Repair to repair the CmtyStorage_Index directory.

   To optimize the CmtyStorage_Index directory

   Optimizing the CmtyStorage_Index directory condenses the indexed data for better performance. This procedure is similar to database optimization and can be used as part of routine maintenance.

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Communities to open the Communities page.
6. Click Verity Indexing to open the Collection Actions page.
7. Click Optimize to optimize the CmtyStorage_Index directory.

   To delete the CmtyStorage_Index directory

   Deleting the CmtyStorage_Index directory deletes the entire collection. If you believe the data within your collection is corrupted, or, if Verity Indexing is not responding to performed maintenance tasks, you may want to simply delete and recreate the CmtyStorage_Index directory.

1. Log in to the e-Series site as an administrator.

2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to open the Lookup Lists page.
4. Select System Parameters to open the System Parameters page.
5. Select e-Communities to open the Communities page.
6. Click Verity Indexing to open the Collection Actions page.
7. Click Delete to delete the CmtyStorage_Index directory.

   Note: Once the CmtyStorage_Index directory is deleted, the community search fields will no longer be available in the Community Home Page. The CmtyStorage_Index directory will have to be recreated for the search fields to become available.

Displaying User-Defined Fields in e-Series

Security filters are available for controlling the display and functionality of user-defined fields in e-Series. For new sites, the wizards and triggers are modified to build new security filters for user-defined fields. For existing sites, run the Update_Security_Cursors script to add the user-defined tables and fields.

Naming User-defined Fields

When naming user-defined fields that have similar names (such as MRM_CAMP_DATE and MRM_CAMP), do not use names that end in _integer, _float, _range, _date, _time, or _eurodate if the fist custom field is a checkbox.

To export custom windows to a report

The export utility includes the option of exporting Custom Windows (or User Defined) fields.

Edit the CustomReport.cfm file to select custom fields contained in the custom windows Export file. This file is found in the following directory.

1. \ScriptContent\Reports\Custom Report.cfm

   As an administrator or member of a group with a member export filter,

1. Perform a search.
2. From the search results window. Click Export.
3. Click Custom View Report.
4. On the Export Results window, click Custom Window Export. The Export Results window displays the report.

   Custom Window Export CustomReport.cfm file

   The custom window export uses a customizable file, ScriptContent\Reports\CustomReport.cfm, that allows a single table name and x number of fields to be exported. Any table that can be joined with the Name table can be used with the custom export.

   An AND statement can be hard coded into the select statement that exports the record set. This provides additional control of report output. There are two options. You can specify a field, or you can create a ColdFusion variable for the value of the query criteria. The CustomReport.cfm file is annotated and provides an example of how to use the new field.

   Note: Since the custom export is using a user configurable file, security filters do not apply to the data export.

Defining Lookups

Overview of Defining Lookups

This section includes the system settings that are set up through the Lookup Lists page.

The goal of this section is to give you the knowledge and skills necessary to manage and administer the Lookup options.

After completing this section, you will be able to do the following:

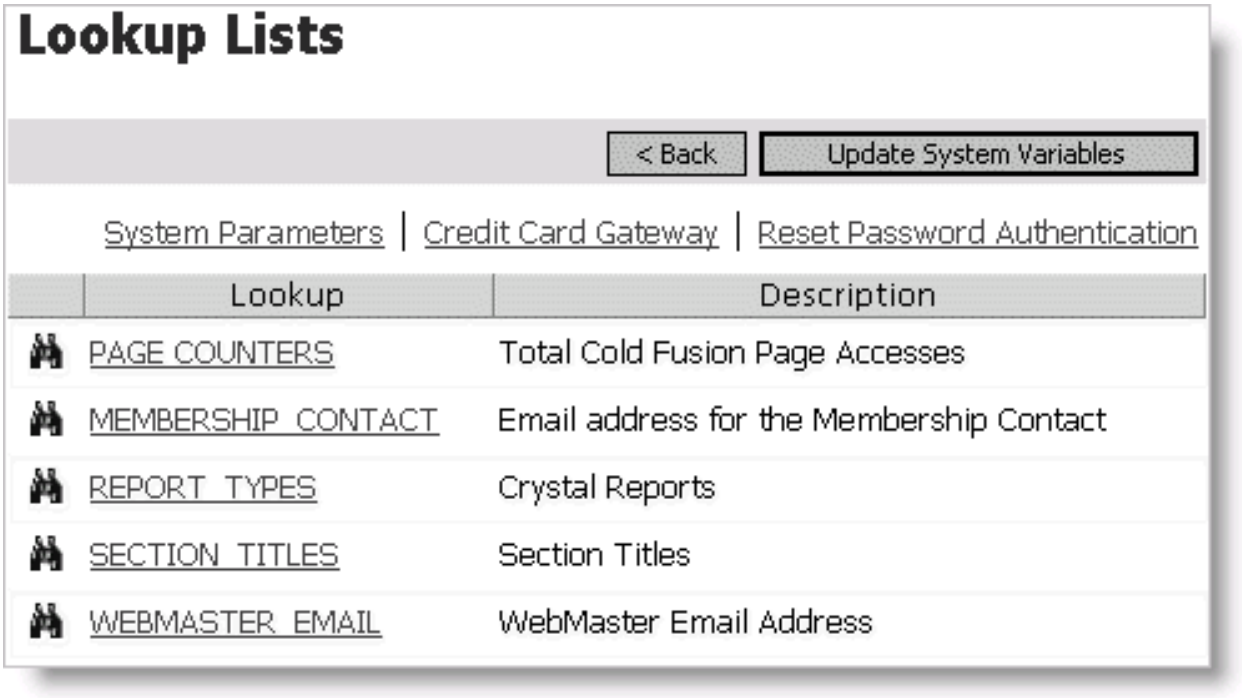
- Configure and manage Lookup options
- Verifying the Credit Card Gateway

- Resetting Password Authentication
- Insert organization contacts

Configuring and Managing Lookup Options

An important administrative tool in e-Series is the ability to configure the Lookup options. With the Lookup options, you can set parameters for the items you want to track in e-Series. View the Lookup options in the Lookup Lists page.

Lookup Lists page



Admin> Lookups

System Parameters

System Parameters set module-wide and site-wide functions.

Credit Card Gateway

Select to open the Credit Card Authorization Options window used for enabling PayPal and verifying the gateway connection.

Reset Password Authentication

Select to open the Reset Password Authentication page used for selecting the fields users are required to populate when resetting their passwords.

PAGE_COUNTERS

Page Counters allow the administrator to see which ColdFusion pages have been visited and how many times. This information is not visible to Web customers.

ACTIVITY_TYPES

Activity Types allow you to track system-defined and user-defined member activities.

CHAPTER

Create chapters and up to three sub-groupings of chapters for your organization.

COMMENT_TYPES

Comment Types allow you to respond to, delete, and archive comments submitted by customers. Comments are stored in the database. Follow-up and staff notification email messages are sent when comments are received.

COUNTRY

Insert country names.

MEMBER_TYPES

Insert member types and enter descriptions.

PAY_TYPES

Set up and track various payment types such as credit cards and cash.

RELATIONSHIP_TYPES

Define and track the types of relationships that can exist between one customer and another.

STATE

Insert state or province names.

CATEGORY

Create special billings or other categories that can be assigned to chapters.

CONTACT_SERVICES

Create codes for specific types of services such as PRINT for printers.

GL_ACCOUNT

Specify the GL Account to be used.

MEET_REG_CLASS

Insert event registration classes and enter descriptions.

MEMBER_STATUS

Insert member statuses and enter descriptions.

MEMBERSHIP_CONTACT

Enter the email address for your organization's Membership contact.

PREFIX

Insert name prefixes and enter descriptions.

REPORT_TYPES

Insert report types and enter descriptions.

SECTION_TITLES

Insert titles for page areas and enter descriptions.

SOURCE_CODE

Insert codes for source of order and enter descriptions.

SUFFIX

Insert name suffixes and enter descriptions.

TITLE

Insert name titles and enter descriptions.

WEBMASTER_EMAIL

Enter the email address for your organization's Webmaster contact.

Notes about the Lookups feature

- The Lookups feature in e-Series is very powerful, so allow only a few people in the organization to insert and edit the Lookup options.
- Inserting a new chapter with the e-Series Lookup option actually adds new chapters into the iMIS database; therefore, you should add new chapters only in the iMIS Set up chapters window (Customers> Set up tables > Chapters) and not in e-Series.
- Although you can add new member types in e-Series, those changes will affect the iMIS database. We recommend that you do not edit or change a member type in e-Series.
- A Category List can be added in e-Series, but it should not be edited or deleted.
- Do not use a space in the name of an activity type. The system will not accept it.
- The e-Series System Parameters go into the iMIS System Parameter tables.
- The Address One value is set in iMIS and should not be edited in e-Series.
- The Organization Name is the default Org Name in iMIS.
- The Functional Title is the default in iMIS.
- The GL_ACCOUNT in e-Series is the real GL account.
- The Hold Code is not supported in e-Series.
- Title is not supported in e-Series.
- The Max Number of Rows Displayed option is available to save your server's resources during large search requests.
- A search that produces more than 10,000 records generates an error message.
- The Major Key value pulls from iMIS.
- Several items in the Lookup options should be edited only if you are configuring an e-Series site without iMIS. These include:

- System Parameters - Several System Parameter fields should not be edited in e-Series because changes made to those fields affect the iMIS database.
- Member Types
- Chapter
- Country
- Pay Types
- Relationship Types
- State
- Category
- GL Account
- Meet Reg Class
- Member Status
- Prefix
- Source Code

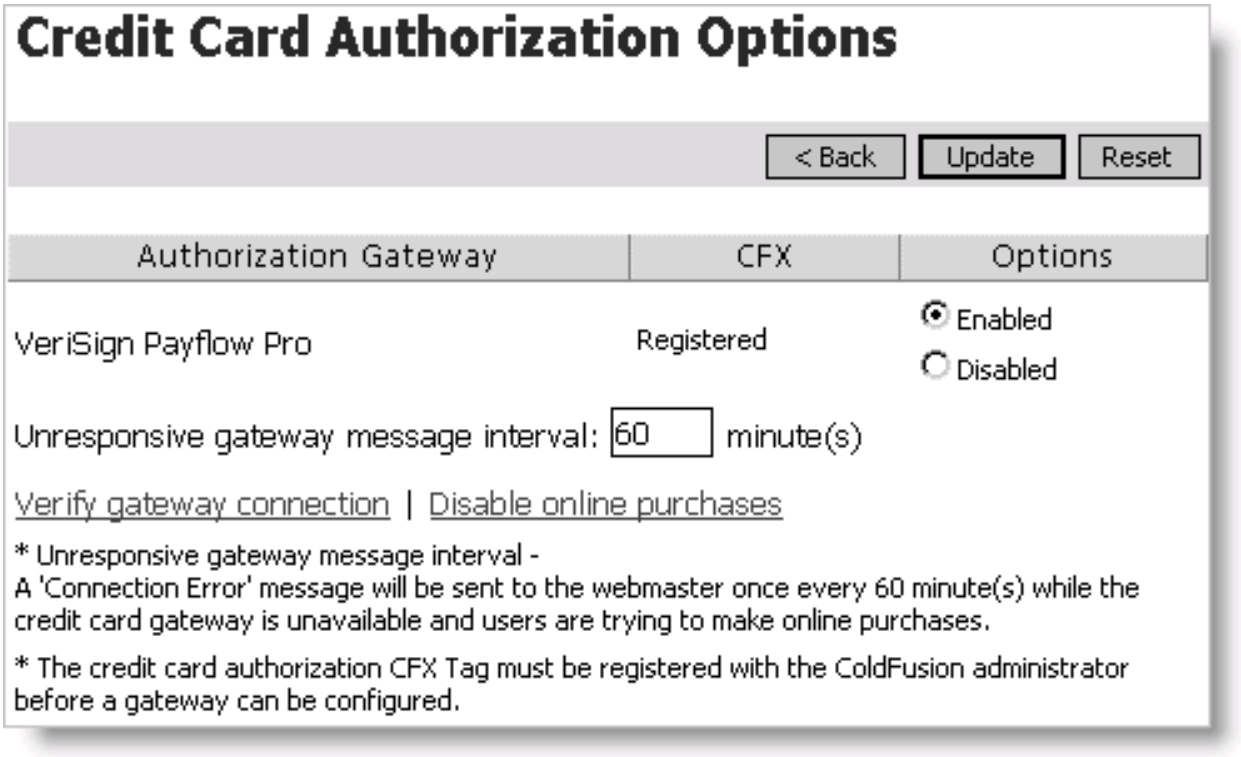
The other Lookup options are safe to edit in e-Series with or without iMIS Business Framework.

Verifying the Credit Card Gateway

You can test and verify the connection between your e-Series site and the gateway to ensure credit card transactions process successfully. When credit card transactions do not process successfully, webmaster notification is sent by email when a customer is making a purchase and the gateway is unavailable. Logic in the CCValidation.txt file tests the connection before starting an online transaction. If the connection fails, an email message is sent to your site's webmaster.

The interval between email messages sent to the webmaster can be set in minutes when the gateway is unavailable and customers are trying to make purchases. When the

gateway is unavailable, you can disable online purchases until the gateway can be re-established.



Example of the updated Credit Card Authorization Options page (from Admin, select Lookups> Credit Card Gateway)

Authorization Gateway

Enable or Disable your site's authorized credit card gateway.

Unresponsive gateway message interval

(Default is 60 minutes) Enter the interval in minutes between emails sent to the web-master when the credit card gateway is unavailable and customers are trying to make pur-chases. For example, if the interval is set to 60 minutes, 60 minutes will elapse between the emails that are sent automatically to the webmaster each time a customer tries to make a purchase when the gateway is unavailable.

Verify gateway connection link

Select to verify the connection to the credit card gateway. When the credit card gateway connection is verified, a message displays stating that the connection was verified successfully. If the credit card gateway connection is not verified, a message displays stating that the connection was not verified.

Enable/Disable online purchases link

Toggle to enable and disable online purchases by customers. When online purchases are enabled (the Disable online purchases link is displayed), customers can make purchases from your e-Series site.

When online purchases are disabled (the Enable online purchases link is displayed), customers will not be able to make purchases from your
e-Series site, and they will receive the following message when they try to make a purchase:

Online purchases are unavailable at this time. Please check back later.

To change the text in this area of the web page add a file named 'OnlinePurchases.txt' to the Source directory.

Remember to Update any changes each time you enable or disable online purchases.

Note: If the credit card gateway is Disabled on the Credit Card Authorization Options page, none of the new options will display. The Enabled option must be enabled for the new options to display on the page.

Resetting Password Authentication

e-Series administrators determine which information requires user authentication when users reset their passwords. However, to authenticate the required information when resetting their passwords, all users must already have the information stored in their records.

To ensure that all users have the necessary information entered in their records, the information requiring authentication in the Reset My Password page also must require population in the Sign Up page when users first sign up for an e-Series site. If the fields do not require population in the Sign Up page, a user may not enter all of the information

necessary for authentication. The user then would not be able to reset their password because the information that requires authentication would be missing in their record.

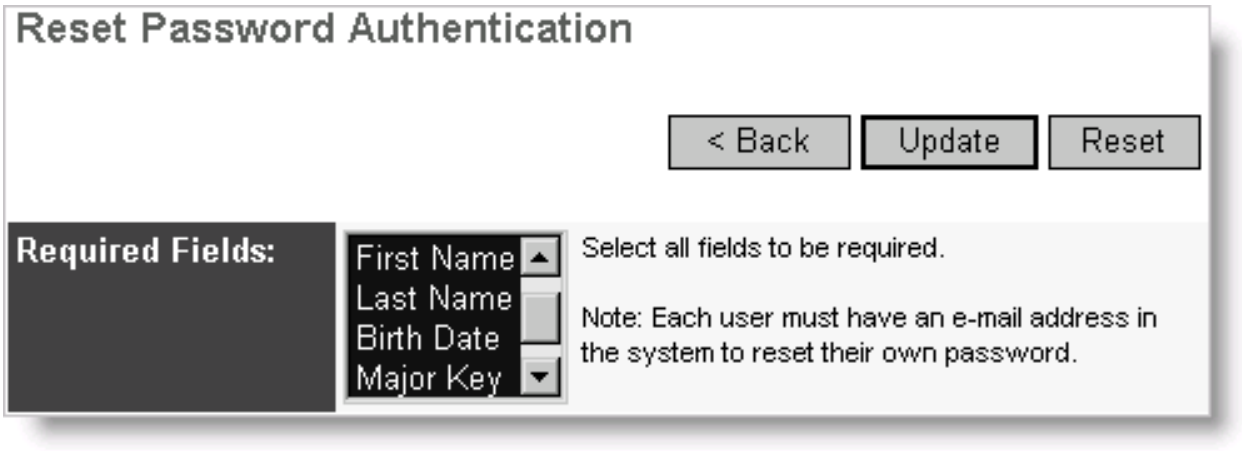
Administrators can enable the appropriate fields to require population in the Sign Up page by selecting the fields that require population on the Required Fields page in the e-Customer System Parameters.

Caution! Any time an administrator changes their site's required fields in the e-Customer System Parameters, they also must reset the password authentication fields. All users must have valid data entered in their record for all specified authentication fields in order to reset their logins and passwords.

To require password authentication

Before you can select the fields for which you want to require authentication, ensure that the same fields are selected on the Required Fields page in the e-Customer System Parameters. If the same fields are not selected, they will not display in the Required Fields list on the Reset Password Authentication page.

1. Log in to your e-Series site as an administrator.
2. Select Admin> Lookups to open the Lookup Lists page.
3. Select the Reset Password Authentication link to open the Reset Password Authentication page.
4. Select the fields for which you want to require authentication from the Required Fields list.
5. Click Update.



Example of the Reset Password Authentication page

Inserting Organization Contacts

When setting up your e-Series site, identify the individuals within your organization who will be the organization's customer contacts. These contacts are defined through the Lookup options.

To insert a Membership contact

The person assigned as the organization's Membership contact receives e-mail messages notifying the organization when a customer submits a site registration or updates their record (if this option is enabled). The system generates these notifications automatically.

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select MEMBERSHIP_CONTACT to display the MEMBERSHIP_CONTACT List page.
5. Click Insert MEMBERSHIP_CONTACT to display the Insert MEMBERSHIP_CONTACT page.
6. Enter the name of the customer contact in the MEMBERSHIP_CONTACT field.
7. Enter the e-mail address of the customer contact in the Substitute field.

8. Enter a brief description in the Description field.
9. Click Submit. A confirmation message displays.
10. Click OK.

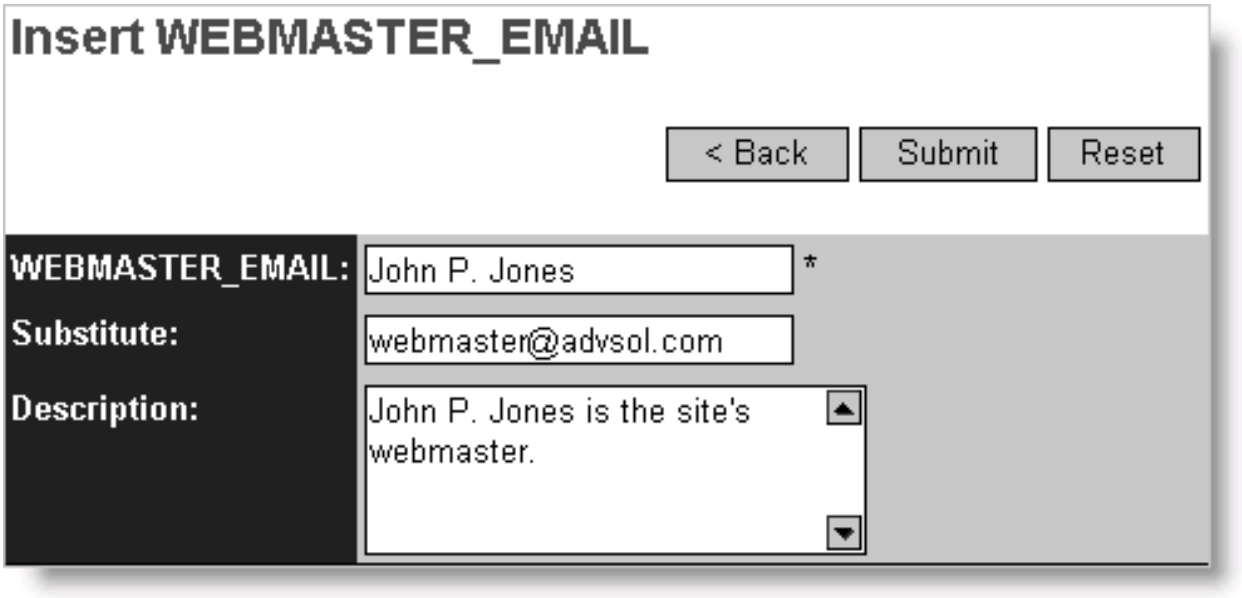
Insert MEMBERSHIP_CONTACT page

To insert a Webmaster contact

The person you assign to be the organization's Webmaster contact will receive all of the e-mail messages that users send when contacting your site's Webmaster.

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select WEBMASTER_EMAIL to display the WEBMASTER EMAIL_List page.
5. Click Insert WEBMASTER_EMAIL to open the Insert WEBMASTER_EMAIL page.
6. Enter the name of the Webmaster in the WEBMASTER_EMAIL field.
7. Enter the e-mail address of the Webmaster contact in the Substitute field.

8. Enter a brief description in the Description field.
9. Click Submit. A confirmation message displays.
10. Click OK.



Insert WEBMASTER_EMAIL page

Hands-on exercise: Insert yourself as the customer contact

Enter yourself as the customer contact with the following information:

- MEMBERSHIP_CONTACT: Your name
- Substitute: Your e-mail address
- Description: Name of individual doing this exercise

Setting up and Managing e-Series

Overview of Managing e-Series

Note: Customer records should be edited only in iMIS, not in e-Series.

This section includes the system settings necessary for managing your e-Series site.

1. Assigning Logins and Passwords in iMIS

2. Assigning Security Logins and Passwords for e-Series
3. Generating Logins for e-Series
4. Uploading Files

The goal of this section is to give you the knowledge and skills necessary to set up iMIS for your e-Series site. After completing this section, you will be able to do the following:

1. Assign security groups in iMIS
2. Assign security logins and passwords
3. Generate logins for e-Series
4. Upload files

Assigning Security Logins and Passwords for e-Series

You will need to create a security login and password for your e-Series site if a user has not created a login and password and you want to invite the user to an Invitation Only community or you want to add the user as a community administrator.

To assign a security login and password to a user

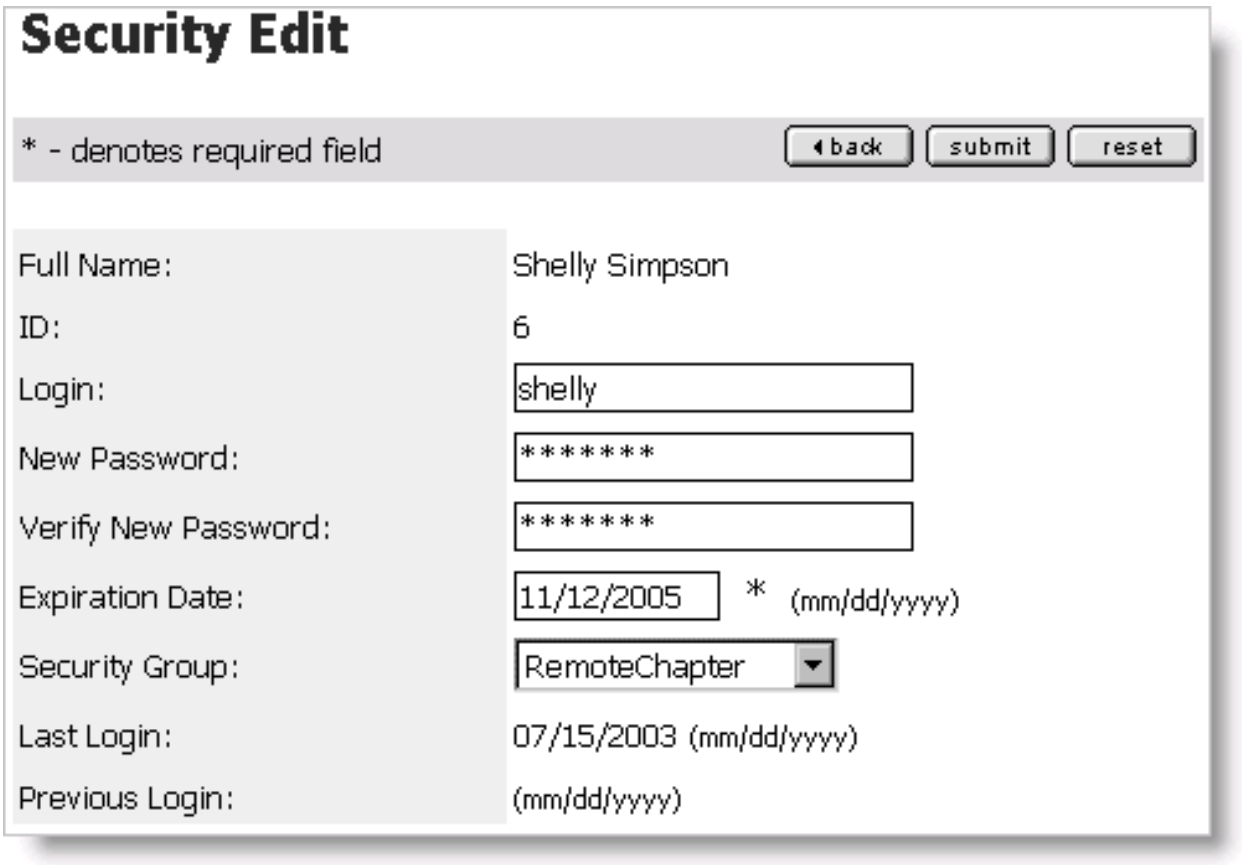
1. Log in to your e-Series site as an administrator.
2. Select Directory in the top navigation bar.
3. Search for and display the user's record for which you want to assign a security login and password. The user's Profile page displays.
4. Click security to open the Security Edit page.
5. Enter the user's security information:

- Enter a Login for the user.
- Enter a New Password for the user.
- Re-enter the password in the Verify New Password field.

- Enter the Expiration Date.
- Select a Security Group from the drop-down list.

  Note: Make sure the security group has access to the module(s) you want the user to access.

6. Click submit.
7. Click OK.



Security Edit page

Generating Logins for e-Series

The Generate Logins wizard allows e-Series administrators to automate and abbreviate the process of creating mass logins and passwords for new e-Series users.

Note: If more than one email address is entered for the e-Series MEMBERSHIP_CONTACT (either multiple values in the MEMBERSHIP_CONTACT general look-up/validation table or a single value with multiple email addresses), email generated by the Generate Logins wizard will not be sent out. Remove any additional membership contact email addresses so that only one exists.

Generate Logins wizard

Admin> Generate Login

Restrict by

The Restrict by field provides administrators with four options for defining specific user groups:

- None - Select this option to restrict login generation according to Security Group only.
- Chapter - Select this option to enable the Chapter field and restrict login generation according to specific chapter affiliation and Security Group.

- Member Type - Select this option to enable the Member Type field and restrict login generation according to specific member type and Security Group.
- SQL (Advanced Only) - Select this option to enable the SQL (Advanced Only) field and restrict login generation according to a specific SQL query and Security Group.

  Email Links to Members

  Enable to email the Add My Password link to the users of the defined group when the wizard runs.

  Expiration Date

  Enter the expiration date for the generation of logins for users in the defined group. Users defined in the group will not be able to enter their own personalized logins and passwords after the expiration date.

  To extend the Expiration Date after running the wizard, perform the following query:

  Update Name_Security

  Set EXPIRATION_DATE='Future_Date'

  Where EXPIRATION_DATE='Original_Date'

  Security Group

  Select the security group for which you want to restrict login generation.

Using the Generate Logins Wizard

When a new e-Series site is installed, logins and passwords have to be created for each of the site's new users. The Generate Logins wizard allows e-Series administrators to generate user logins automatically for all users or to restrict login generation to specific and defined user groups. Administrators set up specific user groups using parameters defined through the Restrict by and Security Group fields. After a user group has been set up in the wizard, the administrator clicks submit to run the Generate Logins wizard.

When the wizard runs, it simulates and creates logins and passwords for all of the users defined in the group. For example, entering a specific SQL query in the SQL (Advanced Only) field and selecting RemoteChapter in the Security Group field generates simulated

logins for all members of the Administrator security group who meet the parameters of the SQL query. Once the simulated logins and passwords have been created, users then can enter their own personalized logins and passwords.

Note: Performance testing indicates that the Generate Logins wizard may take some time to process on large databases. Make sure to run this process at night or when the database activity is low.

Disabling Login Authentication

If Login is one of the criteria enabled in the Reset Password Authentication page to require authentication in the Reset My Password page, new users will be required to authenticate their existing logins when creating their own logins and passwords. Since new users will not know their system generated logins, they will not be able to authenticate them and will not be allowed to create their own logins and passwords.

If an e-Series administrator does not want to require new users to authenticate their system generated logins, they can edit the GenerateLoginResponseText.cfm file found in ScriptContent/MailMessages by removing the #ucase(temp_logon)# Login variable.

For additional information on authenticating user information, refer to Resetting Password Authentication.

Notifying users to enter their logins and passwords

e-Series administrators have two options when running the Generate Logins wizard regarding notifying users to enter their own logins and passwords:

1. E-mail Links to Members option enabled - If an administrator enables the E-mail Links to Members option, then each user will receive an email containing the Add My Password link when the Generate Logins wizard runs. Users can select the link to go to a page where they then can reset the simulated login generated by the wizard and enter their own personalized logins and passwords. The Add My Password link essentially functions like the Reset my password link.
2. E-mail Links to Members option disabled - If an administrator does not enable the Email Links to Members option, then the Add My Password link is not sent to the users. The

administrator then will have to notify users by either email or letter to enter their own personalized logins and passwords using the Reset my password link.

To run the Generate Logins wizard

The Generate Logins wizard is applicable only for users whose records are stored in the iMIS database but who have never logged in to the e-Series site. The wizard is not applicable for users who have already created their logins and passwords. Existing e-Series users will have to change their logins and passwords through either the Security Edit page or the Reset My Password link on the Login page.

Note: Performance testing indicates that the Generate Logins wizard may take some time to process on large databases. Make sure to run this process at night or when the database activity is low.

1. Log in to your e-Series site as an administrator.
2. Select Admin> Generate Login to open the Generate Logins wizard.
3. Select the appropriate parameter from the Restrict by drop-down list that you want to use to restrict login generation:

- None - Select this option to not restrict login generation.
- Chapter - Select this option to enable the Chapter field and restrict login generation according to specific chapter affiliation.
- Member Type - Select this option to enable the Member Type field and restrict login generation according to a specific customer type.
- SQL (Advanced Only) - Select this option to enable the SQL (Advanced Only) field and restrict login generation according to a specific SQL query.
- If you select SQL(Advanced Only), you must add Name_Security.WEB_LOGIN='' and Name_Security.PASSWORD='' to your criteria. Otherwise, erroneous e-mails may be sent to members since their security information will not be updated.
- These clauses also are required to prevent overwriting existing users' valid logins.

4. (optional) Enable the Email Links to Members option. If the Email Links to Members option is not enabled, then no e-mail containing the Add My Password link is sent to the users. You then will have to manually notify users by either e-mail or letter to enter their own personalized logins and passwords using the Reset my password link.
5. Enter the Expiration Date.
6. Select the appropriate user Security Group.
7. Click submit.

Setting time span for changes to e-Series login information

Users can be prevented from logging on immediately after they change their e-Series password. The time span can be specified using a cfparam application variable. The default length is 0.

Example:

<cfparam name="application.logoncachequery" default="CreateTimeSpan(0,0,0,0)" type-e="string">

A variable can be added to the Security folders Module.cfm or Application.cfm file to set a time span to cache the query.

Example:

<cfset application.logoncachequery = "CreateTimeSpan(0,0,5,0)">

Uploading Files

The File Upload utility allows you to transfer files located on your local computer to the Webserver where they reside in your directory. Files also can be deleted from the server remotely. Files that are added or removed are recorded in a 'file.log' file in the customer directory. The File Upload utility is controlled through the Security Detail page.

It is important to place files where they belong. For example, upload headers you created to the StaticPages/HeaderImages directory and place bullets in the Bullets directory.

Note: Never remove any files that end with “.cfm.”

Be careful about uploading large files. If your Internet connection is slow or unreliable, limit uploading to small files.

To upload files

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> File Upload in the side index to display the File Upload page.
4. Select the File Destination directory.
5. Click Browse to find the new file.
6. Click Send File to Server to send the file. If you have multiple files, send one file at a time.

Hands-on exercise: Upload a file

1. Select Admin> File Upload in the side index.
2. Select Reports in the File Destination drop-down list.
3. Browse to your C:\eSeries folder and double-click Membertype.rpt.
4. Send the file to the server.

Ability to disable U.S. phone formatting in e-Series

An iMIS system setup option enables an administrator to disable formatting on all phone fields. This setting also applies to e-Series. By default this option is disabled and will not affect current customers.

Enabling European debit cards in e-Series

European users can make payments in iMIS using debit cards. Any cash account set up in iMIS of the type Debit Card appears in the Credit Card Type drop-down list on the Check-Out Basket page in e-Series. This is in addition to any credit card types that are currently displayed. See Set up cash accounts window.

Although e-Series supports debit card transactions, it does not validate the debit card information. Arranging immediate authorization of the debit card using an alternative

third-party gateway is the responsibility of the consultant or AiSP performing iMIS implementation.

Note: Debit cards are only supported outside of the United States.

Optional Issue Number and Issue Date

To support the use of European debit cards for making payments in e-Series, two optional fields, Issue Number and Issue Date, can be added. To place these two fields on the Check-Out Basket page, add <cfset application.enableissuefields = 1> to the _eSeriesConfig.txt file.

Date range for Issue Date

The date range for the Issue Date field can be configured by adding the application.issueyear variable to the _eSeriesConfig.txt file. This controls the years listed in the drop-down box for the Issue Date field on the Checkout Basket page.

Example:

<cfset application.issueyear = "2001;2002;2003;2004;2005">

GSTINC now supported in e-Series

GST Included pricing, purchasing, and registration is supported in e-Orders and e-Events. When a user purchases a GSTINC product or registers for a GSTINC event or event function, e-Series checks to see whether a user is required to pay taxes on this item, and if so, calculates the amount of the included tax and separates it from the product price when creating financial transaction records.

Note: GSTINC must be configured in iMIS and Canadian Taxation must be enabled for the organization in iMIS System Setup before e-Series can use GSTINC features. See Canadian Taxation.

GSTINC Events setup notes

To use GSTINC pricing with any part of an event, the Tax Authority must be defined as GSTINC on the iMIS Define an event window. Event functions can then be designated as GST by checking the GST box on the Event Function Detail window.

GSTINC Orders setup notes

To apply GSTINC to orders, you must check the Use Taxation box on the iMIS Set up country names window for each country to which GST applies and to which orders can be shipped.

If Use Taxation is not checked for the customer's Ship To country, iMIS will subtract the tax, based on the GSTINC tax rate, from any GSTINC products in the order.

If the customer's Ship To country is not specified in the order, iMIS assumes that the customer's country is the same as the iMIS default organization's country to determine GST status.

All products which are to be treated as GSTINC must have the GSTINC box checked on the manager products window.

Note: The Ship To address does not apply to events. Because events occur in a specified place, iMIS uses the Tax Authority defined in the Define an Event window.

Tax exempt status and GSTINC

Some customers are entitled to tax exempt status. iMIS recognizes the tax exempt status of customers whose tax exemption code or number has been entered in the Tax Exempt field on the Customers > Financial tab. When a tax exempt customer places an order or registers for an event, iMIS will subtract the tax amount, based on the GSTINC tax rate, from the price of any items defined as GSTINC.

Anonymous users and GSTINC pricing

If a customer is not logged in and adds items to the shopping basket, items will be displayed at their listed price. If the customer then logs in to check out and is either tax exempt, or is having the product shipped to a country to which GST is not applied, tax is subtracted from items that are defined as GSTINC.

Setting up iMIS for e-Events

Overview of Setting up iMIS for e-Events

Before you can accept online registrations for your events, you must set up the events in both iMIS Events and in e-Series.

1. Create the event in iMIS. We strongly recommend that all events be set up and edited in iMIS rather than e-Series. Refer to the iMIS Events guide.
2. Set up the e-Events System Parameters.
3. Enable batch control in iMIS.
4. Accept and process event registrations.

The goal of this section is to give you the knowledge and skills necessary to set up iMIS for e-Events.

After completing this section, you will be able to do the following:

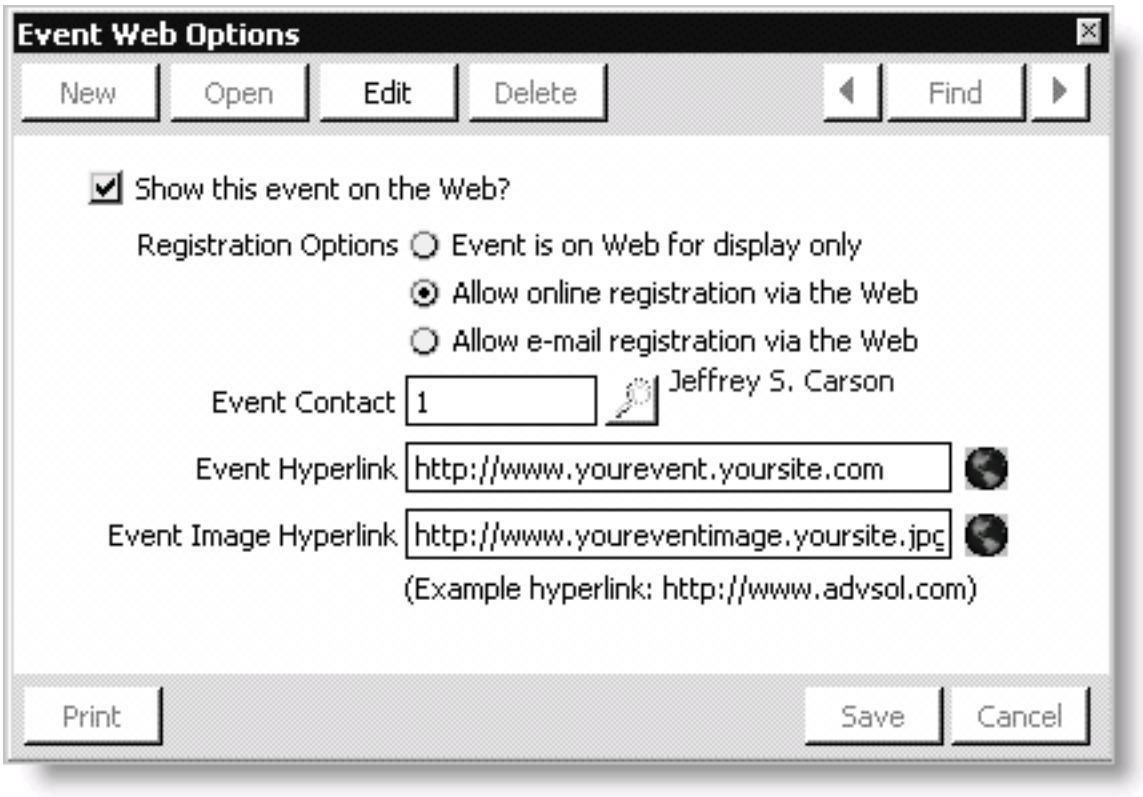
- Enable events for the Web
- Enable event functions for the Web

Enabling Events for the Web

If your system is licensed for e-Series, the Web Options menu item is accessible by clicking More on the Define an event window. Select Web Options to open the Event Web Options window and enable your events.

Note: To prevent registrants from registering for closed events (Status is C), make sure to disable the Show this event on the Web option for the event on the Event Web Options window.

Event Web Options window



From Events, select Define an event, select an event, click More, and select Web Options

Show this event on the Web

Select to display the event on the Web.

When an Administrator logs in to e-Series, every event is available for viewing in e-Events regardless of whether they are enabled to be viewed or sold on the Web. However, this functionality exists only for Administrators. Users logging in to e-Series without administrative privileges will see only the events that have been enabled for viewing on the Web.

Note: Do not enable an event for viewing on the web without setting up pricing information for the event. Site users can still register for events even if the pricing information has not been set up. This could result in a user being registered but not charged for an event.

Registration Options

Event is on Web for display only - Select to allow customers to view the event on the Web only. They cannot register for the event.

Allow online registration via the Web - Select to allow customers to register and pay for the event online.

Allow email registration via the Web - Select to allow customers to register for the event by email.

Event Contact

Enter the ID number of the event contact. When a site user registers for an event, an email is sent to the event contact notifying them of the user's registration.

Event Hyperlink

Enter the hyperlink to information about the event.

Event Image Hyperlink

(optional) Enter the hyperlink to the event logo or image.

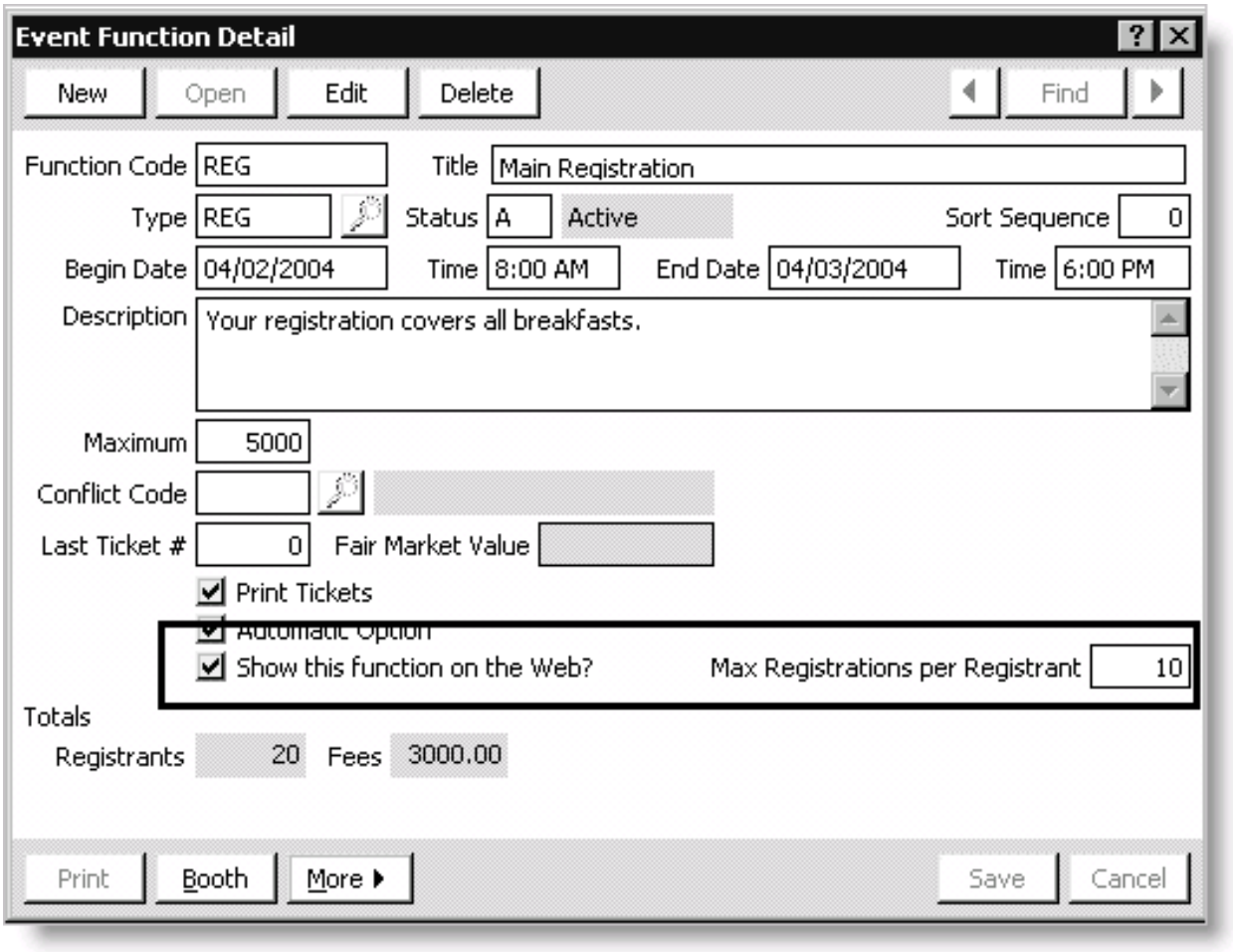
To enable an event for the Web

1. Open the Event Web Options window for an event:
   - From Events, select Define an event to open the Define an event window.
   - Double-click an event to open a second instance of the Define an event window.
   - Click More, and select Web Options to open the Event Web Options window.
2. Click Edit.
3. Enable the Show this event on the Web option.
4. Enable one of the Registration Options.
5. (optional) Enter an Event Contact.
6. (optional) Enter an Event Hyperlink.

7. (optional) Enter an Event Image Hyperlink.
8. Click Save.

Enabling Event Functions for the Web

Event functions are enabled for the Web on the Event function detail window. See the iMIS Events guide for more on defining an event function.



From Events, select Define an event, and double-click an event

Limiting the Number of Web Registrants for an Event Function

You can limit the number of Web registrations a single registrant can enter for a function in e-Events by entering a non-zero value in the Max Registrations per Registrant field.

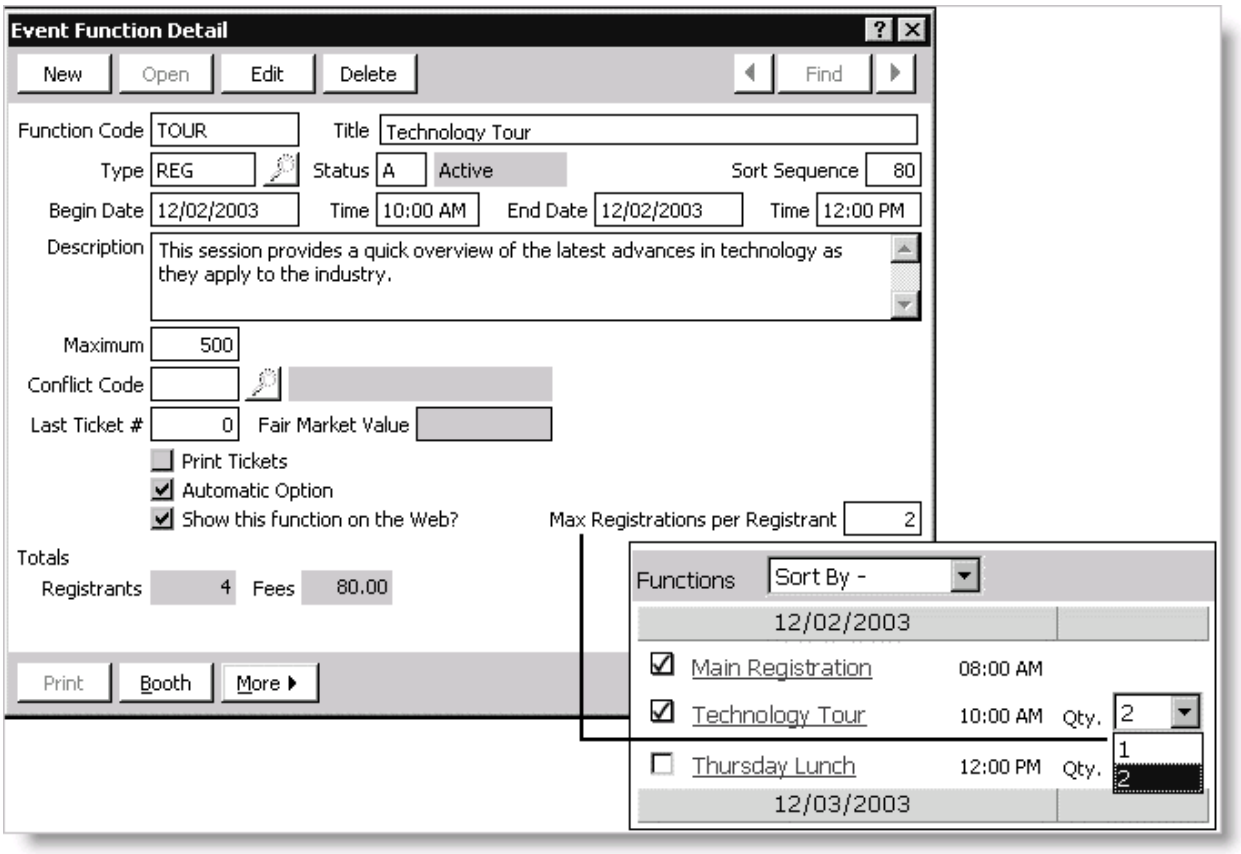
Note: The Max Registrations per Registrant field is only displayed if the Show this function on the Web option is enabled. The Show this function on the Web option only displays if the Show this event on the Web option is enabled for the event on the Event Web Options window (from Events, select Define an event, double-click an event, click More, and select Web Options).

The number of function registrations a single online registrant can purchase is dependent on the value in the Max Registrations per Registrant field, which governs the Qty drop-down list on the Event Registration page.

If you do not want to limit the number of function registrations that a single online registrant can purchase, then you should set the maximum value as high as is realistic for a single registrant at your event.

For example, if one (1) is entered as the Max Registrations per Registrant, then the function displays on the Event Registration page, but the Qty drop-down list does not display. A registrant is limited to purchasing only one function registration.

If five (5) is entered as the Max Registrations per Registrant, then the function displays with the Qty drop-down list showing the values of 1, 2, 3, 4, and 5. A registrant has the ability to purchase up to five function registrations.



Max Registrants per Registrant field

This is an example of the Max Registrations per Registrant field as it governs the Qty drop-down list on the Event Registration page. Max Registrations per Registrant is set to one for the Main Registration function and to two for the Technology Tour function.

Calculate Registration Eligibility in e-Events

You can set up a requirement for registrant eligibility using the SQL Registration Verification Calculation field in the Event Notes window. Set this option while logged in as an administrator in iMIS. (Events>Define an Event>New>More>Notes)

Enter a SQL calculation that results in either 1(pass) or 0(fail). If the event fails, the customer gets a registration failure error.

To enable an event function for the Web

1. Open the Event Function Detail window for an event:

- From Events, select Define an event to open the Define an event window.
- Double-click an event to open a second instance of the Define an event window.

2. Click Edit.
3. Enable the Show this function on the Web option.
4. Enter the number of Max Registrations per Registrant.
5. Click Save.

Hands-on exercise: Create an eEvent

1. Create the following e-Event:

- Meeting Code: SPRCONF
- Title: Spring Conference
- Begin Date: April 2, 2002
- End Date: April 5, 2002

2. Create the following functions:

- Code: GEN SESSION
- Title: General Session
- Cost: $35 Members; $50 Non-members

3. Make the event available for online registration.

Setting up iMIS for e-Orders

Overview of Setting up iMIS for e-Orders

Before using e-Orders, be sure to complete the following tasks in iMIS:

- Define credit card accounts
- Enable batch control
- Define tax codes

The goal of this section is to give you the knowledge and skills necessary to set up iMIS for your e-Series site.

After completing this section, you will be able to do the following:

- Define a Web order type
- Set up Web order options
- Set up order status defaults
- Set up inventory defaults
- Use multiple warehouses with e-Orders
- Create and enable product categories for the Web
- Create and enable products for the Web
- Calculate freight charges in e-Orders
- View batches, orders, and activity records in iMIS

Defining a Web Order Type

Before getting started with e-Orders, you must define a Web order type. All e-Orders are entered initially as pro-forma orders to ensure user validation. After you validate the order, the order converts to the default order type and processes through the required staging activities.

To define Web order types

1. From Orders, select Set up tables > Order types to open the Set up order types window.
2. Click New.
3. Enter a Code for the Web order type.
4. Enter a Description for the Web order type.
5. Enter a description of the invoice in the Invoice Desc field.
6. Select the Pro-Forma order type from the list of Categories.

7. (optional) Enable Print a Quote.
8. Enter an order type in the Convert to Order Type field.
9. Click Save.

Setting up Web Order Options

Enter the Web Customer Type and Web Order Type in the iMIS Web Order Options window. The settings defined in the Web Order Options window determine whether taxes are applicable for purchases made over the Web.

See these details in iMIS Orders Administration:

- Defining web order options
- Defining order status defaults

Hands-on exercise: Set up Order Status defaults

1. Enable the following Standard Orders options:

- Pick List
- Shipping Paper
- Invoice
- Affect Inventory

2. Debit Orders: Enable Invoice
3. Credit Orders: Enable Invoice
4. Pro Forma Orders: Print Quote
5. Convert to Order Types: REG

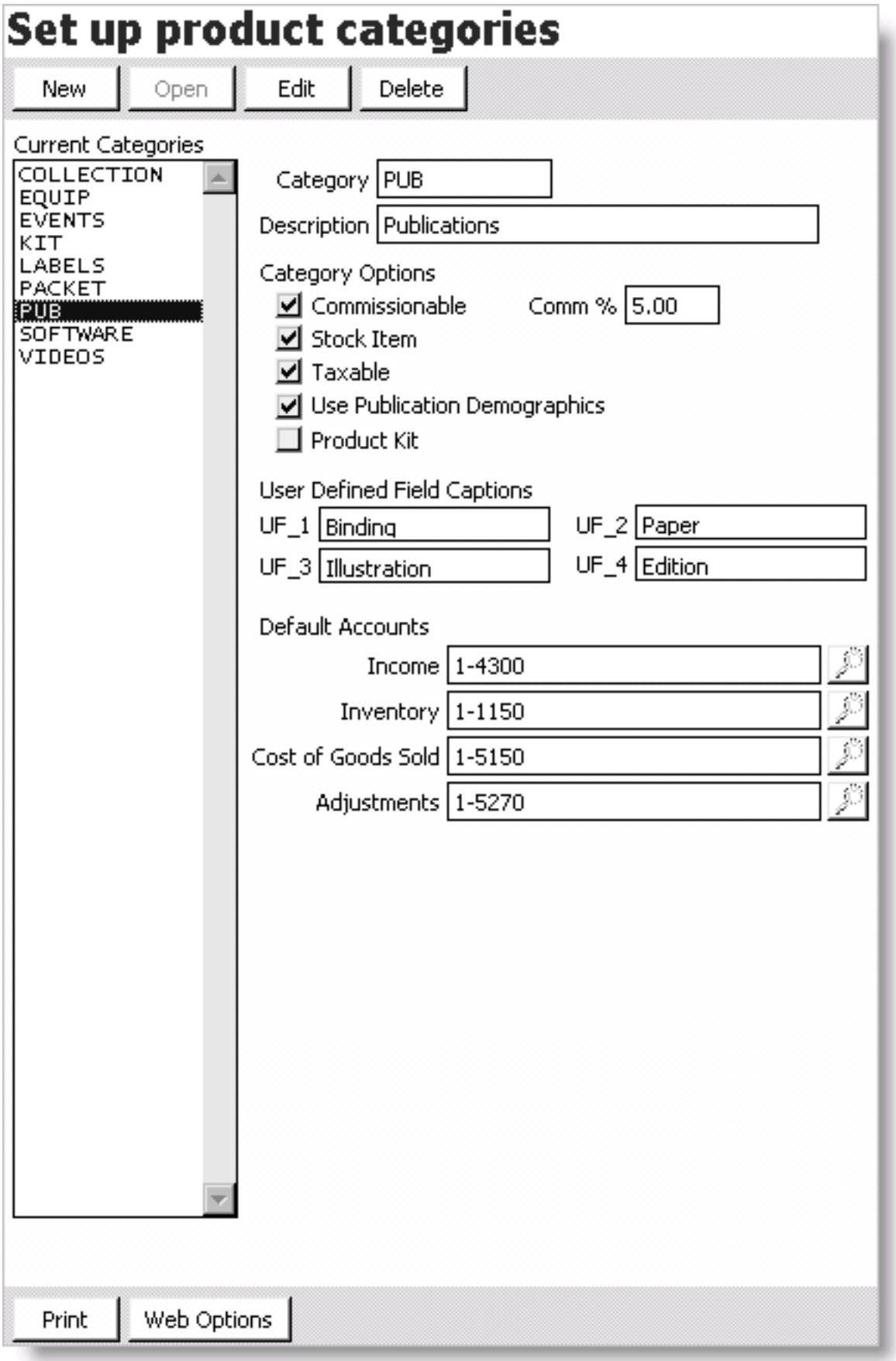
Creating Product Categories for the Web

The next step in setting up e-Orders is to set up product categories for the Web. Product categories allow you to classify your products, and you must define your product cat-

egories before defining your individual products. Each time you define a product, you must assign it to one of your product categories.

Product categories are used to assign default accounts and to enable category options for groups of products.

Set up product categories window


Set up product categories
New
Open
Edit
Delete
Current Categories
COLLECTION
EQUIP
EVENTS
KIT
LABELS
PACKET
PUB
SOFTWARE
VIDEOS
Category PUB
Description Publications
Category Options
Commissionable
Comm % 5.00
Stock Item
Taxable
Use Publication Demographics
Product Kit
User Defined Field Captions
UF_1 Binding
UF_2 Paper
UF_3 Illustration
UF_4 Edition
Default Accounts
Income 1-4300
Inventory 1-1150
Cost of Goods Sold 1-5150
Adjustments 1-5270
Print
Web Options

From Orders, select Set up tables > Product categories

Current Categories

This list displays the defined product categories.

Category

Enter a code for the product category.

Description

Enter a description of the product category.

Category Options

Enable the options that you want enabled by default when defining new products on the Manage products window (from Orders, select Manage inventory> Manage products). You can override all settings at the product level.

- Commissionable - Enable if you want the sale of a product within a category to generate a commission. The Comm % field displays when you enable the Commissionable option.
- Comm % - (Displays only when the Commissionable option is enabled) Enter the default commission rate generated by the sale of a product in this category. For example, a 5.00 % commission rate would generate a $5.00 commission on a $100.00 sale. Make sure to enter the rate as a percentage and not as a decimal.
- Stock Item - Enable to indicate that products within this category have physical inventory. You can track inventory only for items stocked in inventory.
- Taxable - Enable to indicate that the product category is taxable.
- Use Publication Demographics - Enable to define publication demographic information for a category's products. If the option is enabled, the Publication button displays and enables on the Manage products window for products belonging to that category. Clicking the Publication button on the Manage products window opens the Publication Demographics window used for defining demographic information for publications. e-Orders displays the demographic information defined for each product in the category on the

product detail page.

- Product Kit - Enable to indicate that the product category consists of product kits.

  User Defined Field Captions

  If the User Defined Field Captions (UF_1 through UF_4) are defined for a product category in Orders, then e-Orders will display the user-defined fields for each product in the category on the product detail page. If the User Defined Field Captions are not defined, the user-defined fields will not display on the product detail page.

  If general lookup/validation tables have been defined for the user-defined fields, each user-defined field's drop-down list will display the predefined data. Customers can customize their product orders by selecting specific options from the drop-down lists. However, customers cannot enter free-form data in the fields for which general lookup/validation tables have been defined.

  If general lookup/validation tables have not been defined for the user-defined fields, customers can enter any necessary order information for their products.

  Any Additional Information entered or selected for a product on the product detail page will display on each succeeding order-entry page up to but excluding the Check-Out Basket page.

iMIS

e-Orders

Wed, November 6, 2002 search in All

home ▸ departments ▸ **product detail**

Sailing, A Sport for Young and Old **Price: $ 32.00**

This book introduces you to the world of sailing. Topics discussed include an indepth history of sailing and sailing craft development, sailing terminology, and sailing maneuvers.

Product Demographics

Author:	Forrester, John R.
Publisher:	White Cap Publishing
Date of Publication:	02/20/2002
ISBN Number:	8905872AD
Format:	Hardcover
Edition:	Second
Pages:	438

Product Description

John R. Forrester introduces readers of all ages to the world of sailing. The history of sailing and craft development are covered, and sailing terminology and maneuvers are discussed in layman's terms. Detailed and descriptive illustrations are included.

Additional Information

Binding: Leather Cover

Paper: Acid Free Paper

Illustration: Color Illustrations

Edition: Limited Edition

add to your products

Example of the User Defined Field Captions set up for the product detail page

Default Accounts

These accounts allow you to define the default accounts for products within this category. You can override the accounts at the product level on the Accounting window and at the warehouse level on the Warehouses window if Multi-Warehouses is enabled.

When defining product-level accounts, the most specific accounting information takes precedence. For example, iMIS first looks for warehouse level accounts. iMIS then looks for product level accounts. If you have not defined product-level accounts, iMIS uses the default product category accounts. If you have not defined default product category accounts, iMIS uses the accounts defined on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

- Income - Enter a product category's default income account number.
- Inventory - Enter a product category's default inventory account number.
- Cost of Goods Sold - Enter a product category's default cost of goods sold account number.
- Adjustments - Enter a product category's default adjustments account number.

Web Options button

Opens the Web Options window for the selected product category. The Web Options window is used for enabling products either for sale or for viewing on the Web.

To define product categories for e-Series

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Click New.
3. Enter a code for the product category in the Category field.
4. Enter a Description of the product category.
5. Enable the applicable Category Options.

6. Enter the User Defined Field Captions that will display and generate text boxes on the Product Detail window.
7. Enter any applicable Default Accounts.
8. Click Save.

Note: If you are licensed for and plan to use product kits, you must define a product kit category by enabling the Kit category option. See Orders for details about product kits.

Hands-on exercise: Create a Web product category

Create the following product category:

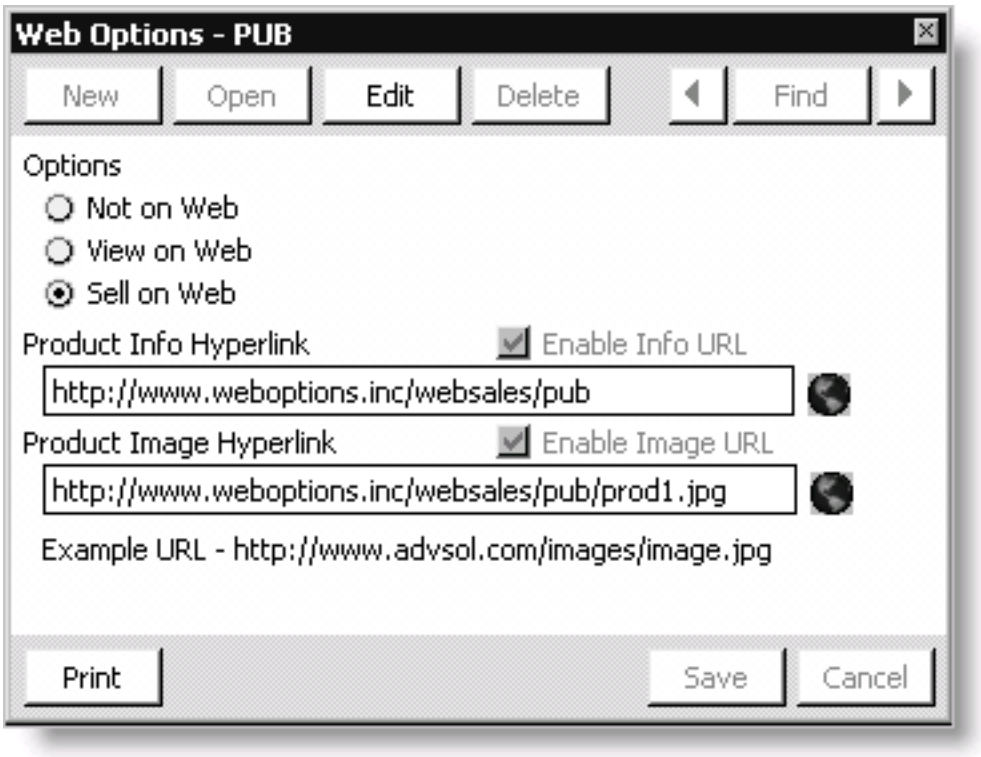
- Code: WEB_CAT
- Description: Web Products Category
- Enable the Stock Item option
- Enable the Taxable option

Enabling Product Categories for the Web

After defining your product categories, you can enable any of the categories for viewing or sale on the Web. Product categories are enabled for the Web through the Web Options window.

Note: Changing the Web options in the Web Category window after Web products have been created changes the Web options for all the products in that category.

Web Options window



From Orders, select Set up tables > Product categories, select a category, and click Web Options

Edit button

Click to define and edit a product category's Web options.

Options

- Not on Web - Enable to prevent the product category from being viewed or sold on the Web.
- View on Web - Enable to allow the product category to be viewed, but not sold, on the Web.
- Sell on Web - Enable to allow the product category to be viewed and sold on the Web.

Product Info Hyperlink

Enter a URL to information about the product category.

Enable Info URL

Enable to enable the hyperlink to the product category's information.

Product Image Hyperlink

Enter a URL to an image representing the product category.

Enable Image URL

Enable to enable the hyperlink to the product category's image.

To enable a product category for the Web

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Select a product category from the list of Current Categories.
3. Click Edit.
4. Click Web Options to open the Web Options window.
5. Enable the product for the Web:

- Enable the View on Web option if you want the product category to be viewed, but not sold, on the Web.
- Enable the Sell on Web option if you want the product category to be viewed and sold on the Web.
- Enable Not on Web option if you want to prevent the product category from being viewed or sold on the Web.

6. Enter the Product Info Hyperlink.
7. Enable the Enable Info URL option.
8. Enter the Product Image Hyperlink.
9. Enable the Enable Image URL option.
10. Click Save.

Hands-on exercise: Enable a product category to be viewed on the Web

Enable the following product category to be viewed on the Web:

- Option: Sell on Web
- Product Info Hyperlink: URL supplied by your instructor
- Product Image Hyperlink: URL supplied by your instructor
- Thumbnail Image Hyperlink: URL supplied by your instructor

Creating e-Order Products

After defining your Web product category, you can define your individual Web products. Products are defined and managed on the Manage products window, which allows you to enter and access product codes, titles, descriptions, prices, accounting information, and other specific product options. The Manage products window also is used for accessing and displaying product inventory information and for designating a product's Process Manager items.

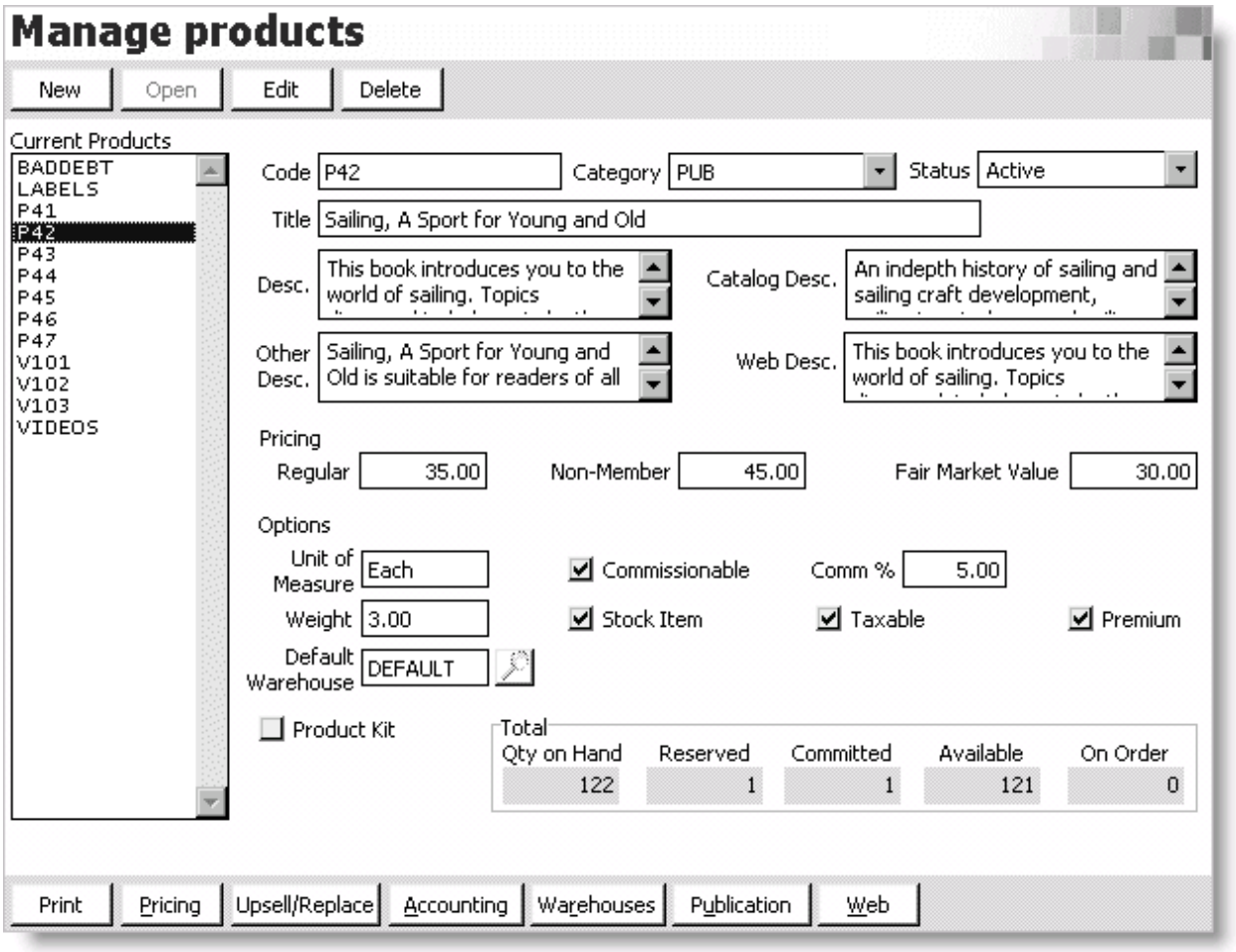
Using Product Status with e-Orders

The default status for all new products is Active, and you can assign the following status codes to your products at any time during a product's life cycle:

- Active (A) - Display and can be ordered in e-Orders (dependent on inventory level and/or the AllowOutofStockOrder configuration file).
- Inactive (I) - Do not display and cannot be ordered in e-Orders.
- Mark for Deletion (D) - Do not display in e-Orders and are no longer available. The only reason to keep these products in the system is for historical reporting or to prevent reusing an assigned product code.
- Not Available (N) - Display in e-Orders but are no longer available (the inventory level is set to zero, and the AllowOutofStockOrder configuration file should be set to No so the products cannot be ordered). The primary reason to keep these products in the system is to identify replacement products.

- Out of Production (O) - Display and can be ordered in e-Orders (dependent on inventory level and/or the AllowOutofStockOrder configuration file). Once stock is depleted, an Out of Production product's status is changed to Not Available.

Manage products window



From Orders, select Manage inventory > Manage products

Current Products

Lists all of the defined product codes. Select a product code from the drop-down list to view the product's details on the Manage products window.

Code

(required) Enter a specific code for an individual product.

Category

(required) Select a product's category from the drop-down list. Product categories are defined on the Set up product categories window (from Orders, select Set up tables > Product categories).

Status

Select a product's status from the drop-down list. The default status for all new products is Active, and you can assign the following status codes to your products at any time during a product's life cycle:

- Active (A)
- Inactive (I)
- Mark for Deletion (D)
- Not Available (N)
- Out of Production (O)

See Product Status Codes for more on product status code functionality.

Title

Enter a brief, descriptive product title. A product's title displays next to the product's code on windows and reports; product titles can be edited when entering orders.

If the Print 1st Line Desc on Statement option is enabled on the AR/Cash Set up module window (from AR/Cash, select Set up module), the product title entered in the Description field on the Overview tab of the Enter and edit orders window prints on invoices and statements. The product title entered in the Description field also displays on the AR/Cash tab on the Manage customers window and on the AR/Cash Enter and edit cash receipts window. If the Print 1st Line Desc on Statement option is disabled on the AR/Cash Set up module window, only the order number prints on statements and displays on windows.

Description Fields

All description fields hold product descriptions, to a maximum of 5000 characters:

- Desc

  Enter the product description to be seen by staff. The text entered in the Desc field does not appear on printouts, but it will appear on the product's web description if none exists in Web Desc.

- Catalog Desc

  (Applicable for e-Orders) Enter the description for a product catalog; the description can be used for reporting.

- Other Desc

  (Applicable for e-Orders) Enter additional product information; the description can be used for reporting.

- Web Desc

  (Displays only if you are licensed for e-Orders) Enter the description to display on the Product Detail page; otherwise, the web page uses the Desc text, if any.

  Note: Place key search terms within the first 300 characters of the description. In the Public view, search truncates the description to 300 characters, so only text within that range yields search results for users.

  Pricing

- Regular - Enter a product's default unit price. The price entered in the Regular field will apply for all customers unless you enter a different price in the Non-Member field. You can override a product's default price at order entry.

  The Use Member Pricing option on the Overview tab of the Enter and edit orders window allows you to apply Regular product pricing for non-member customers.

- Non-Member (optional) - Enter a product price for non-member customers. This price applies automatically when you sell a product to any customer with Non-Member status, allowing you to avoid most manual price overrides.

If the Non-Member field is blank, a product's price defaults to the value entered in the Regular field for non-member customers. You can override a product's default price at order entry, and the Use Member Pricing option on the Overview tab of the Enter and edit orders window allows you to apply Regular product pricing for non-member customers.

- Fair Market Value (Displays only when the Premium option is enabled) - Enter a fair market value for a product used as a premium. You must enter a value in this field, which can be 0.00. The default value is 0.00.

Options

- Unit of Measure - Enter a product's unit of measure, such as individually, each, foot, yard, sheet, book, or pack.
- Commissionable - Enable if a product's sale generates a commission.
- Comm % - (Displays only when the Commissionable option is enabled) Enter the commission percentage a product's sale will generate.
- Weight - Enter a product's weight. When defining product kits, be sure to enter a Weight. Freight by weight charges will not calculate for a product kit unless a weight has been defined, regardless of whether weight has been defined for the individual kit components.
- Stock Item - Enable to indicate that a product is stored in inventory. When the Stock Item option is enabled, both products in inventory and backorders are tracked in the Qty on Hand, Reserved, Committed, Available, and On Order fields on the Manage products window.
- Taxable - Enable if a product is taxable. When the Taxable option is enabled, iMIS automatically calculates any applicable taxes for a product according to the tax code entered for an order. When defining a new product, the Taxable option on the Manage products window enables by default if the Taxable option on the Set up product categories window is enabled for the new product's category.
- Premium - Enable this option to use a product as a premium for gifts and pledges. This option only displays only if Allow Premiums as Products is enabled on the Fundraising Set up module page.

When an order is generated for a product used as a Fundraising premium, the Notes field on the Order Details tab of the Enter and edit orders window displays the text “Premium order for Transaction TransNum, Batch BatchNum” (for example, Premium order for Transaction 1438, Batch 08062004). See Fundraising Management (see "Fundraising") for details about using premium products.

- Default Warehouse - (Required/Displays only if using Multi-Warehouses) Enter a stock item's default warehouse location. Select the Find icon to look up a warehouse; warehouse locations are defined on the LOCATION general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

  The Default Warehouse field displays only if a product is a stock item and the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory). If a default warehouse is defined on the Inventory System Setup window, the Default Warehouse field defaults to the warehouse defined on the Inventory System Setup window. A product's default warehouse can be overridden at order entry on the Product Detail window with a warehouse that is pre-defined for the product.

  Individual warehouses are set up for products on the Warehouses window (from Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Warehouses).

- Entity - (Optional/displays only if Multiple Entities is enabled on the AR/Cash Set up module window) Enter an owner entity for an individual product. Select the Find icon to look up an entity; entities are defined in the Org Codes field on the Organization Names window (select File > System Setup, and click Organization Names).

  An Entity value can be left blank if the entity owner is the same as the default Orders entity assigned on the AR/Cash Set up module window.

  See Understanding Multiple Entities and Orders for more on product-level entities.

  Product Kit

Enable if a product is a kit. A kit is a group of individual products sold as a single unit. The Product Kit option displays only if your system is licensed for product kitting.

Kit button

(Not shown in example, displays only when the Product Kit option is enabled) Opens the Kitting window used for defining product kits.

Total

The totals are display only:

- Qty on Hand - the total number of products in inventory. If using Multi-Warehouses, Qty on Hand includes the total number of products in inventory across all warehouses.
- Reserved - the number of products that are in “open order” status, including backorders. If using Multi-Warehouses, Reserved includes the total number of products reserved across all warehouses.
- Committed - the number of shippable products in inventory excluding backorders. If using Multi-Warehouses, Committed includes the total number of products committed across all warehouses.
- Available - the number of products on hand excluding reserved products. If using Multi-Warehouses, Available includes the total number of products available across all warehouses.
- On Order - the number of products on order from suppliers. If using Multi-Warehouses, On Order includes the total number of products on order across all warehouses.

  The number of products displayed depends on the number of products entered in the On Order field on the Inventory / Warehouses window (click Inventory / Warehouses on the Manage products window).

Pricing button

Opens the Special Pricing window used for setting up specific product price calculations.

Upsell/Replace button

Opens the Upsell/Replace window used for designating Upsell, Cross-sell, and Replacement items for products.

Accounting button

Opens the Accounting window used for entering product account information.

Inventory / Warehouses button

- Inventory button - (Disabled for non-stock items) Opens the Inventory window used for entering product inventory information. The Inventory button displays and replaces the Warehouses button when Multi-Warehouses is disabled.
- Warehouses button - (Disabled for non-stock items) Opens the Warehouses window used for entering inventory information for a product's individual warehouses. The Warehouses button displays and replaces the Inventory button when Multi-Warehouses is enabled.

Publication button

Opens the Publication Demographics window used for defining additional information for publications. The Publication button displays only if the Use Publication Demographics option is enabled for a product's category on the Set up product categories window (from Orders, select Set up tables > Product categories).

Web button

(Displays only if you are licensed for e-Orders) Opens the Web Options window to display a product on the Web.

To define a product

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Click New.
3. Define the product:

- Enter a Code for the product. The product code should not contain any spaces or special characters other than an underscore.
- Select a product Category from the drop-down list of available categories.
- Enter a Title for the product.

4. Enter any applicable product descriptions:

- Enter a general product description in the Desc field.
- Enter a product description for a product catalog in the Catalog Desc field.
- Enter any other product description in the Other Desc field.
- (e-Orders only) Enter a product description for an e-Orders site in the Web Desc field.

5. Enter the product's Pricing information:

- Enter a default price for the product in the Regular field.
- (optional) Enter a Non-Member price for the product if applicable.

  Note: If products are used only as kit components, you do not need to enter prices for the individual products that make up the kit. Only the kit itself requires product pricing information.

6. Enter the product's Options:

- Enter the product's Unit of Measure, such as each or sheet.
- (optional) Enable the Commissionable option if a product's sale generates a commission (enter a commission percentage in the Comm % field if you enable the Commissionable option).
- Enter the product's Weight.
- Enable the Stock Item option.
- (optional) Enable the Taxable option if the product is taxable.

- (Optional/For use with Fundraising) Enable the Premium option to use the product as a premium for gifts and pledges, and enter a Fair Market Value.
- (Multi-Warehouses only) Enter the product's Default Warehouse location if you are using Multi-Warehouses. Select the Find icon to look up a warehouse.
- (Multi-Entities only) Enter an Entity for the product.

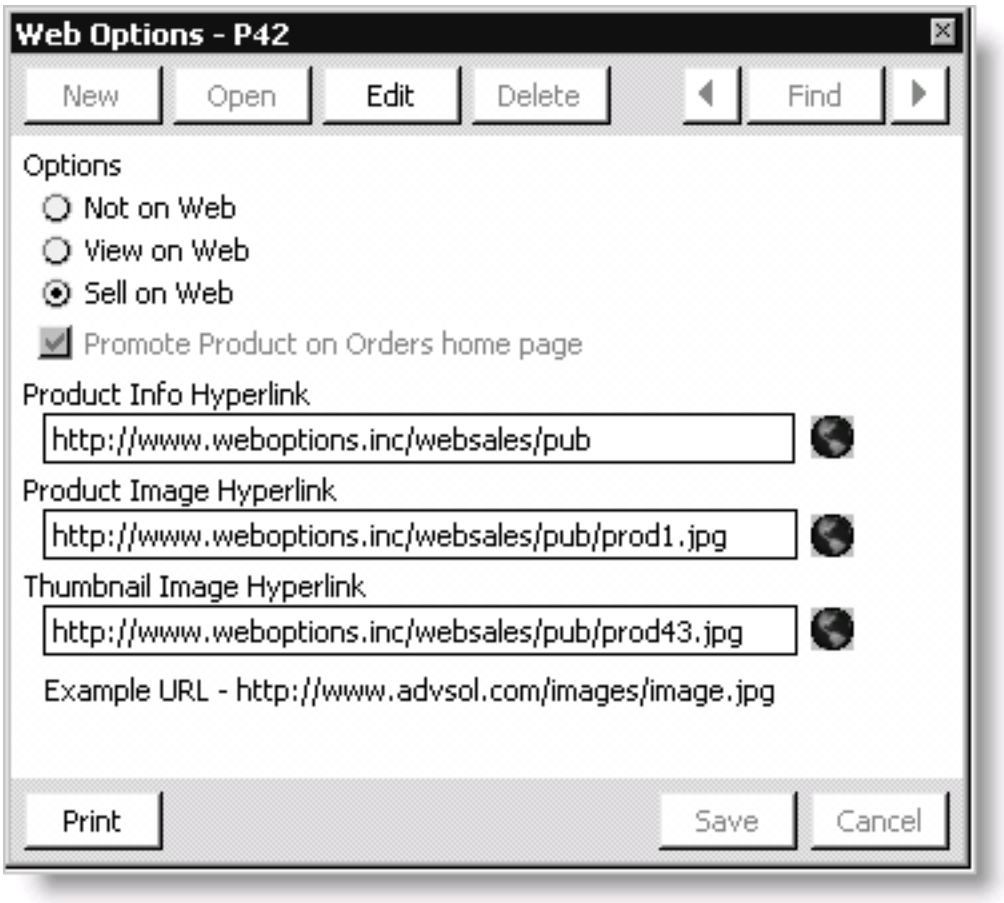
7. Click Save.

Enabling Products for the Web

After defining your Web products, you can enable any of the products for either viewing or sale on the Web. To enable products for the Web, your system must be licensed for e-Orders.

If your system is licensed for e-Orders, the Web button displays on the Manage products window. If your system is not licensed for e-Orders, this button will not be visible. Clicking the Web button opens the Web Options window used for enabling products for the Web.

Web Options window



From Orders, select Manage inventory> Manage products, select a product from the list of Current Products, and click Web

Edit button

Click to define and edit a product's Web options.

Options

- Not on Web - Enable to prevent the product from being viewed or sold on the Web.
- View on Web - Enable to allow the product to be viewed, but not sold, on the Web.
- Sell on Web - Enable to allow the product to be viewed and sold on the Web.
- Promote Product on Orders home page - Enable to promote the product as a Featured Product on the e-Orders main page and on every search e- Orders results page.

Product Info Hyperlink

Enter a URL to information about the product category. Click the Web icon to view the product category's information on the Web.

By default, this field populates with the value entered for the product's category in the Product Info Hyperlink field on the Web Options window (from Orders, select Set up tables > Product categories, select a category, and click Web Options).

Product Image Hyperlink

Enter a URL to an image representing the product category. Click the Web icon to view the product category on the Web.

By default, this field populates with the value entered for the product's category in the Product Image Hyperlink field on the Web Options window (from Orders, select Set up tables > Product categories, select a category, and click Web Options).

Thumbnail Image Hyperlink

Enter a URL to an image of the product. Click the Web icon to view the product on the Web.

Example URL

Displays an example of the proper format for entering a URL.

To enable a product for the Web

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Edit.
4. Click Web to open the Web Options window.
5. Enable the product for the Web:

- Not on Web - prevents it from being viewed or sold on the web.
- View on Web - allows it to be viewed, but not sold, on the web.

- Sell on Web - allows it to be viewed and sold on the web.

6. Enable Promote Product on Orders home page option if you want to promote the product as a Featured Product on your e-Orders main page and on every search results page.
7. Enter the Product Info Hyperlink.
8. Enter the Product Image Hyperlink.
9. Enter the Thumbnail Image Hyperlink.
10. Click Save.

Hands-on exercise: Define a Web product

1. Define the following Web product:

- Product Code: WLABELS
- Product Category: Web_CAT
- Title: Customer labels
- Desc: Set of mailing labels sold over the Web

2. Enter the following pricing information:

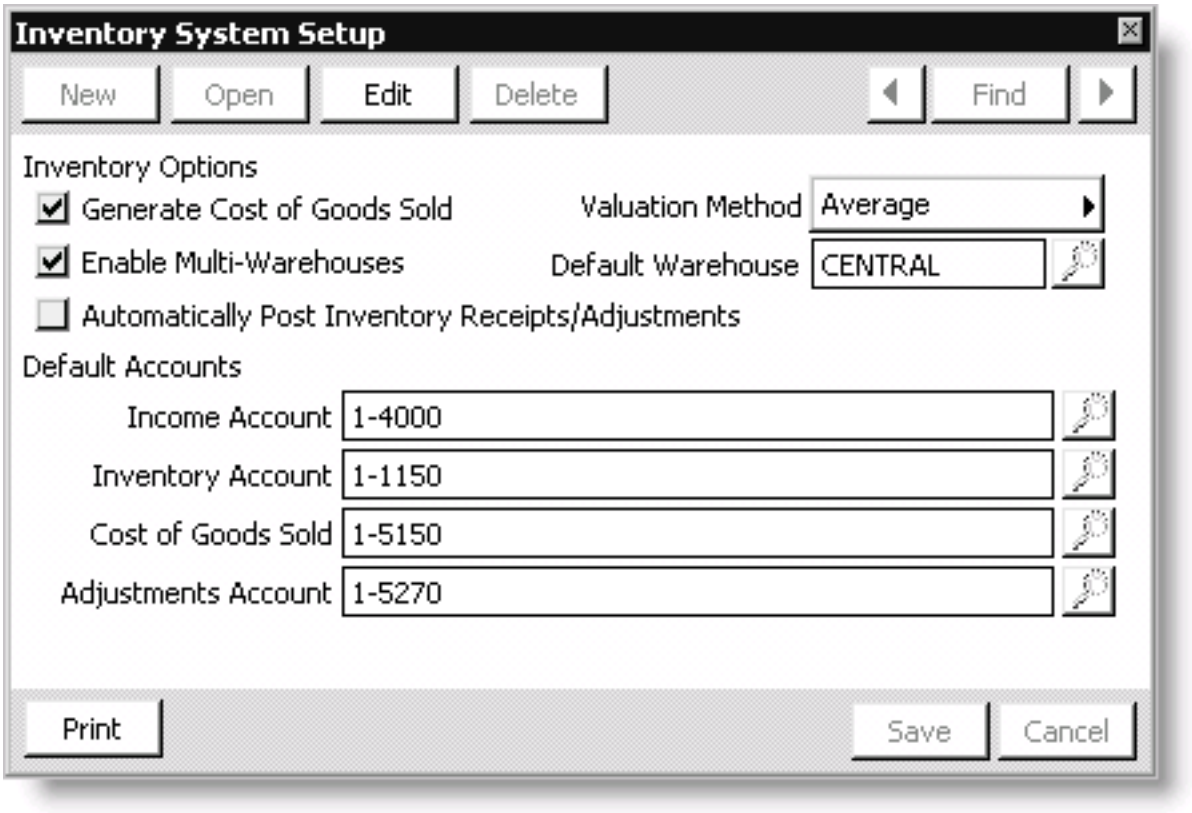
- Regular: 250
- Non-member: 375

3. Enable the Sell on Web option.

Setting up Inventory Defaults

Inventory defaults are the values that the system defaults to if you do not specify options or accounts at order entry. Set the inventory defaults in the Inventory System Setup window.

Inventory System Setup window



From Orders, select Set up module, and click Inventory

Inventory Options

Generate Cost of Goods Sold - Enable to track the cost of the products you sell. The cost of the products sold posts to the Inventory and Cost of Goods Sold accounts during the Invoice orders process. The Valuation Method field displays when you enable the Generate Cost of Goods Sold option.

Valuation Method - (Displays when the Generate Cost of Goods Sold option is enabled) Select the method you want to use to value your product inventory:

- Average - Select this method to determine the cost of goods sold as averaged over time.

  Average unit cost is calculated by dividing average total inventory cost by inventory on hand. Average total inventory cost is calculated using a two-step process:

- The total average unit cost of all invoiced products is subtracted from the average total inventory cost.
- The average total inventory cost then is divided by the updated product inventory on hand.

  A product's inventory on hand is recalculated each time products are invoiced. A product's average unit cost and average total inventory cost are recalculated each time inventory transactions are posted. The Product_Inventory.AVERAGE_COST field updates upon invoicing.

  When you invoice a product order, the product's average unit cost is calculated according to the product quantity on hand and the average total product inventory cost. This average total inventory cost can change every time you post an inventory transaction.

  For example, if you post inventory receipts for an individual product at a cost of $10 and $15 per unit, the total inventory on hand is two units, the average total inventory cost is $25, and the average product cost is $12.50. If you then sell one product and invoice the order, the total inventory on hand is one unit, the average total inventory cost is $25, and the average product cost is $12.50.

  However, if you then post another single product receipt for $15, the total inventory on hand is again two units, but the average total inventory cost and average product cost will be different: The average total product inventory cost will be $27.50 and the average product cost will be $13.75.

  To calculate the average total product inventory cost, subtract the total average product cost of the invoiced products ($12.50) from the average total product inventory cost ($40 - $12.50 = $27.5). To calculate the average product cost, divide the new average total product inventory cost ($27.5) by the current product inventory on hand ($27.5 / 2 = $13.75).
- Standard Cost - Select this method to use a fixed cost to determine the cost of goods sold. Depending on whether Multi-Warehouses is enabled, the Standard Cost is entered manually on either the Inventory or the Warehouses window, allowing you to build overhead costs into your cost of goods sold.

Enable Multi-Warehouses - Enable if individual products are stored in multiple warehouse locations. Warehouse locations are defined on the LOCATION general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

Enabling the Enable Multi-Warehouses option after posting products to inventory does not directly affect product inventory. As with all system setup changes throughout iMIS, changes do not update existing records. You simply need to enter your products' warehouses and inventory information on the Warehouses window (from Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Warehouses).

Default Warehouse - (Enables only if the Enable Multi-Warehouses option is enabled) Enter the default warehouse you want to use when defining new products. Select the Find icon to look up a warehouse; warehouse locations are defined on the LOCATION general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

The warehouse entered displays by default in the Default Warehouse field on the Manage products window when defining new products. You can override a product's default warehouse on the Manage products window at any time.

Automatically Post Inventory Receipts/Adjustments - (Most users should not enable this option) Enable to post inventory transactions automatically. If you do not enable this option, you still can verify and edit your inventory transactions before posting them.

Since posted inventory transactions cannot be edited, automatically posting inventory receipts, adjustments, and transfers is not recommended. Also, if you automatically post inventory receipts, iMIS automatically commits the products in inventory and releases backorders.

Default Accounts

Income Account - Enter the default income account to which income posts. This account is used when an income account is not defined at the warehouse, product, or category level. If you leave this field blank, the income account will not be populated.

Inventory Account - Enter the default inventory account used for recording inventory reductions. This account is used when an inventory account is not defined at the warehouse, product, or category level. If you do not track your product inventory, you do not need to enter an account number.

Note: iMIS does not create an accounting entry when inventory is received. The system assumes that the entry is made to the General Ledger or Accounts Payable when receiving or paying for inventory.

Cost of Goods Sold - Enter the default account used for recording inventory costs when invoicing orders. This account is used if you do not define a cost of goods sold account at the warehouse, product, or category level.

Adjustments Account - Enter the default account used for posting inventory adjustments. This account is used if you do not define an inventory account at the warehouse, product, or category level. The Adjustments Account offsets inventory when you post inventory adjustments, for example, when inventory cost and quantity are adjusted for loss or damage.

To define inventory options

1. From Orders, select Set up module to open the Set up module window.
2. Click Inventory to open the Inventory System Setup window.
3. Click Edit.
4. Enable the applicable Inventory Options.
5. Enter the Default Accounts.
6. Click Save.

Using Multiple Warehouses with e-Orders

e-Orders supports multi-warehouse functionality. See the iMIS Orders guide for more on setting up the Orders module for multi-warehouses.

Placing Orders for Products with Sufficient Inventory

If Multi-Warehouses is enabled in iMIS, e-Orders always places product orders from each product's default warehouse. If a product's default warehouse does not have sufficient inventory in stock to fill an order, but all of the product's warehouses combined do have sufficient inventory to fill the order, then e-Orders will allow the customer to place the order.

e-Orders looks at the total product quantity available but only allocates product orders from a product's default warehouse.

Caution! As long as all of a product's warehouses combined have sufficient inventory to fill an order, the order will be placed.

Placing Orders for Products with Insufficient Inventory

If all of a product's warehouses combined do not have sufficient inventory to fill an order, then e-Orders processes the order just as it currently does when Multi-Warehouses is not enabled. How e-Orders processes an order for a product with insufficient inventory depends on whether backorder processing is enabled or disabled for e-Orders on the Module Config Files page:

- AllowOutofStockOrder = “No” - e-Orders reduces the ordered product quantity to equal the amount available in inventory, and the customer is notified that an adjustment has been made to the items in their basket.
- AllowOutofStockOrder = “Yes” - e-Orders allows the customer to place the order even though insufficient inventory is in stock.

Processing Pro Forma Orders in iMIS

Because all orders entered through e-Orders are entered as pro forma orders, no e-Series order is complete until it is converted to a standard order and processed through the appropriate order processing stages in iMIS.

For orders for which a product's default warehouse does not have sufficient inventory in stock to fill the order, the order then becomes backordered in iMIS, and the product quantity ordered is reserved at the default warehouse. The user processing the order in iMIS then is responsible for determining how the order should be processed.

User Considerations for Processing Pro Forma Orders when MultiWarehouses is Enabled

Users need to consider the following when processing pro forma orders in iMIS when Multi-Warehouses is enabled:

- Determine how to fill a pro forma order for a product when the product's default warehouse does not have sufficient inventory to fill the order. You have three choices:
- Transfer a sufficient amount of product inventory to the default warehouse to fill the order; or
- Edit the order using the Product Detail window to ship the product from a different warehouse location or from multiple warehouse locations; or
- Let the order wait in backorder status until the default warehouse has sufficient inventory to fill the order.
- Process all pro forma orders in a way that minimizes shipping costs. Shipping a product from its default warehouse may not always by the most efficient or inexpensive method of processing an order.

Selling Product Kits in e-Orders

e-Orders supports selling product kits. A product kit is a collection of products sold together as an individual unit for a single price. You define the kits in iMIS and then map the individual products to the product kits. Before you can map individual products to specific product kits, however, you first must define the individual products. Once you define your products, you then can map them to any number of product kits. Refer to iMIS Orders for more on product kits.

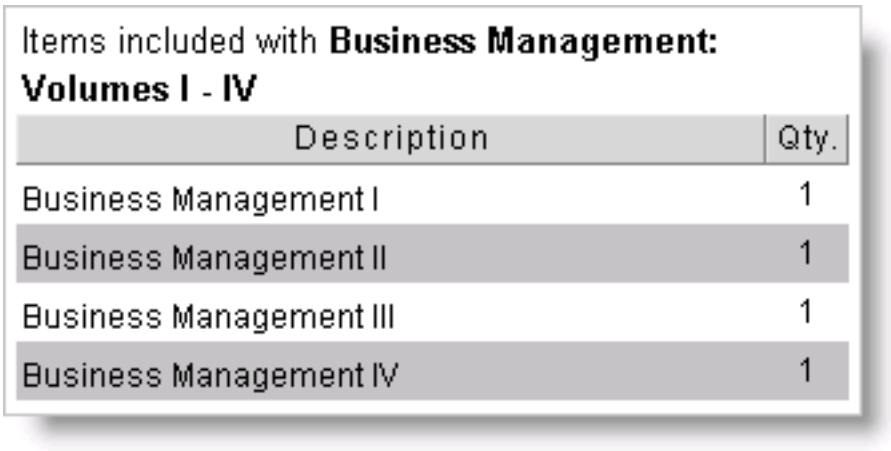
Note: iMIS must be licensed for Kitting before e-Series will use the e-Orders kitting logic.

Displaying and Selling Product Kits on the Web

Product kits function and display the same as individual products sold through e-Orders. Just as with all individual products, you can enable product kits either to sell or only to display on the Web, or you can disable the kits from displaying on the Web entirely.

Viewing Kit Items

Customers can view a list of the items that make up a product kit by selecting the new, customizable view kit items link on the products page. Selecting the link opens a window displaying all of the kit items.



Items included with **Business Management: Volumes I - IV**

Description	Qty.
Business Management I	1
Business Management II	1
Business Management III	1
Business Management IV	1

Example of the view kit items page listing the items in a product kit

Both the view kit items link and the text at the top of the view kit items window are customizable through the Module Config Files page (Admin> Style Form> Edit Config Files> select _eOrdersConfig.txt):

- view kit items link - Application.Orders.LinkTitle.ViewKitItems
- view kit items window text - application.orders.kitlistinfo1 and application.orders.kitlistinfo2

Product Kit Inventory

A benefit of product kitting is that you are able to maintain the inventory of your individual products even when they sell as part of a kit. Each time a customer purchases a product kit, the inventory of the individual products sold in the kit automatically updates within the Orders module of iMIS. By default, e-Orders allows customers to purchase products that are not in stock. This functionality also applies to product kits.

Product kits can be purchased even if individual kit items are not in stock. However, the Stock Item option must be enabled in the iMIS Manage products window for each item

that will be sold in a kit. Individual products that do not have the Stock Item option enabled cannot be sold as part of a kit.

Unless the items used in a product kit are in stock, the kit will be incomplete, and the customizable Out of stock message will display for the product kit on the products page. If your site is set up to accept out-of-stock orders, then the add to your products and view kit items links will display even if insufficient products are in inventory to complete the kit.

If your site is not set up to accept out-of-stock orders, then the add to your products link will not display for an out-of-stock product kit, and customers will not be able to purchase the product kit.

The view kit items link displays even if your site is not set up to accept out-of-stock orders, and customers can select the link to display the individual product kit items. Any out-of-stock item will display an out-of-stock message next to the item's description.

See Orders for more on managing product inventory.

Disabling the Acceptance of OutofStock Orders

To disable the acceptance of out-of-stock orders, the Application.Order.AllowOutofStockOrder variable must equal No in the _eOrdersConfig.txt file (Admin> Style Form> Edit Config Files> select eOrdersConfig.txt).

When the Application.Order.AllowOutofStockOrder variable is set to No, a validation check is performed against both the products available in inventory and the ordered quantity of the product or kit. If the ordered quantity exceeds the amount available in inventory, then the order adjusts automatically to the available amount, and the customer can purchase only the items currently in stock.

The order adjustment displays in the item's Qty field of the e-Orders your products page, and a customizable message displays in the page stating that the quantity requested exceeds the quantity in inventory. This message can be customized by modifying the Application.Orders.QtyAdjustment variable in the _eOrdersConfig.txt file (Admin> Style Form> Edit Config Files> select eOrdersConfig.txt).

Product Kit Confirmation

Both the Purchase Detail page and the Order Confirmation email include information about the individual products that make up a product kit.

On the Purchase Detail page, the Product Kit line lists the kit title, unit price, quantity, and total price of the kit. Each product used in the kit is listed as a bulleted item under the Product Kit line. The quantity of the individual products used in the kit displays next to the product titles. Any out-of-stock item will display an out-of-stock message next to the item's description.

An Order Confirmation email lists the product kit and the individual products that make up the kit. If your site allows out-of-stock orders, then a message displays next to the product line item that is out of stock.

Calculating Freight Charges in e-Orders

e-Orders supports the freight charge calculation methods implemented in iMIS Orders:

- Freight by Weight
- Freight by Total Value Ordered
- Freight by Total Quantity Ordered

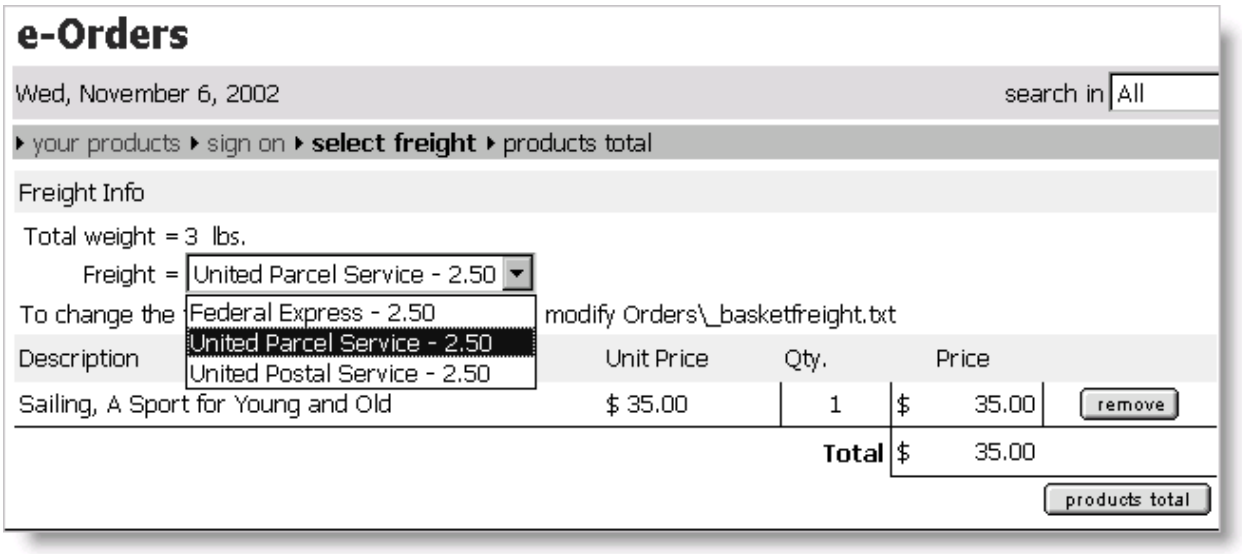
See Orders for more on setting up the Orders module for the new freight charge calculation methods.

Note: If the Automatic Calculation of Freight Charge option is disabled on the Add-on Charges window in Orders (from Orders, select Set up module, and click Add-on Charges), then freight charges will not be calculated for e-Orders, and shipping will be free.

Freight by Weight in e-Orders

When the Freight by Weight option is enabled on the Add-on Charges window in Orders (from Orders, select Set up module, and click Add-on Charges), e-Orders calculates order freight charges by weight.

The Freight Info area on the select freight page displays the Total weight of the order and the Freight drop-down list. Users can select which shipping method they want to use from the Freight drop-down list. The shipping methods that display in the list are limited to those for which weight tables have been defined on the Set up freight by weight window in Orders (from Orders, select Set up tables > Freight by weight).

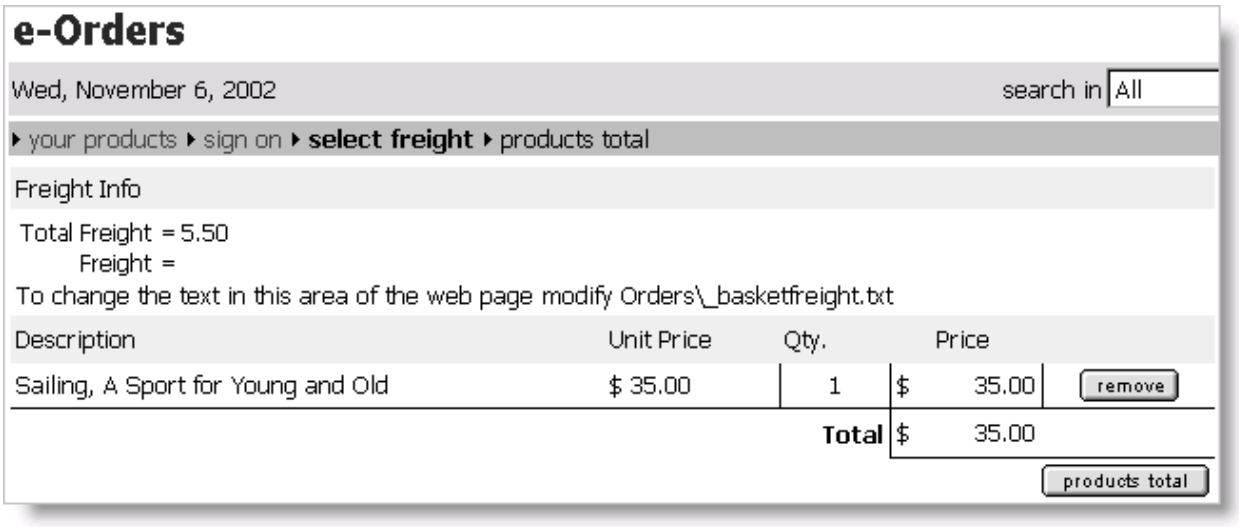


Example of the select freight page with the Freight by Weight calculation option enabled

Freight by Total Value Ordered

When the Freight by Total Value Ordered option is enabled on the Add-on Charges window in iMIS Orders (from Orders, select Set up module, and click Add-on Charges), e-Orders calculates order freight charges by order value.

The Freight Info area on the select freight page displays the Total Freight charge for the order, and the Freight drop-down list is disabled.



Example of the select freight page with the Freight by Total Value Ordered option enabled

Freight by Total Quantity Ordered

When the Freight by Total Quantity Ordered option is enabled on the Add-on Charges window in iMIS Orders (from Orders, select Set up module, and click Add-on Charges), e-Orders calculates order freight charges by order quantity.

The Freight Info area on the select freight page displays the Total Freight charge for the order, and the Freight drop-down list is disabled.

Example of the select freight page with the Freight by Total Quantity Ordered option enabled

Automatic Freight Calculation for International Addresses

e-Orders supports automatic freight calculation for international addresses when calculating freight charges by weight. As with Orders, freight calculation for international addresses is applicable only when calculating freight charges by weight. See Calculating Freight Charges for more.

Note: Shipping costs will not be calculated correctly for orders placed from countries for which shipping rates and zones have not been set up. See Orders System Setup for more on defining shipping rates and shipping zones.

Viewing Batches, Orders, and Activity records in iMIS

There are several things to remember about batches and activity records with e-Series:

- Batches are designated by an “I” at the end of the batch number.
- An activity record is created after a product is invoiced.
- You can view orders and payments made over the Web as you would in iMIS.

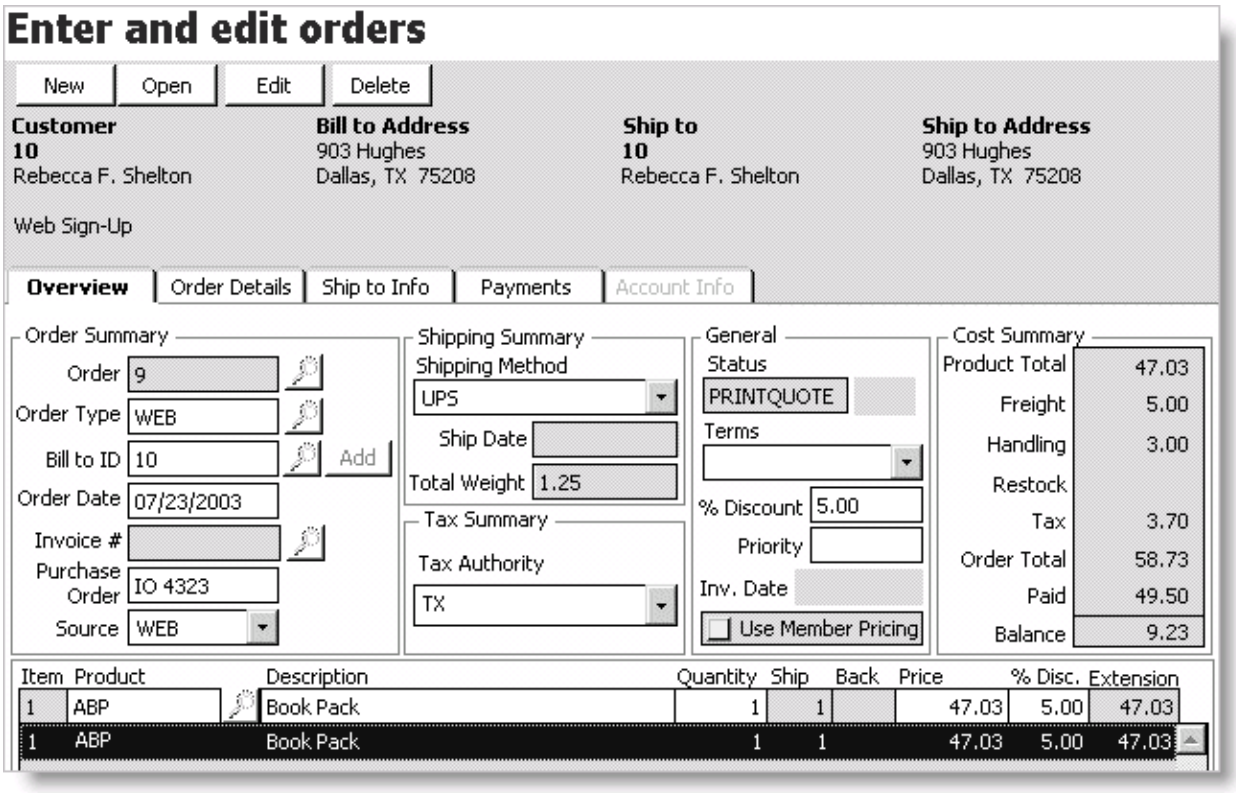
Viewing a Web batch in iMIS

Web batches are designated by the "I" at the end of the batch number. From AR/Cash, select Manage batches to open the Manage batches window.

To view e-Orders in iMIS

Because all e-Orders are pro-forma orders, you must convert a Web order to a regular.

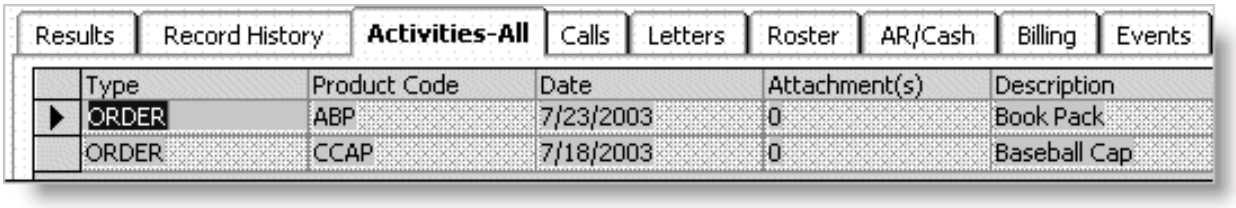
1. From Orders, select Enter and edit orders to open the Enter and edit orders window.
2. Click Open.
3. Enter the Order number, and press Tab to view the order:



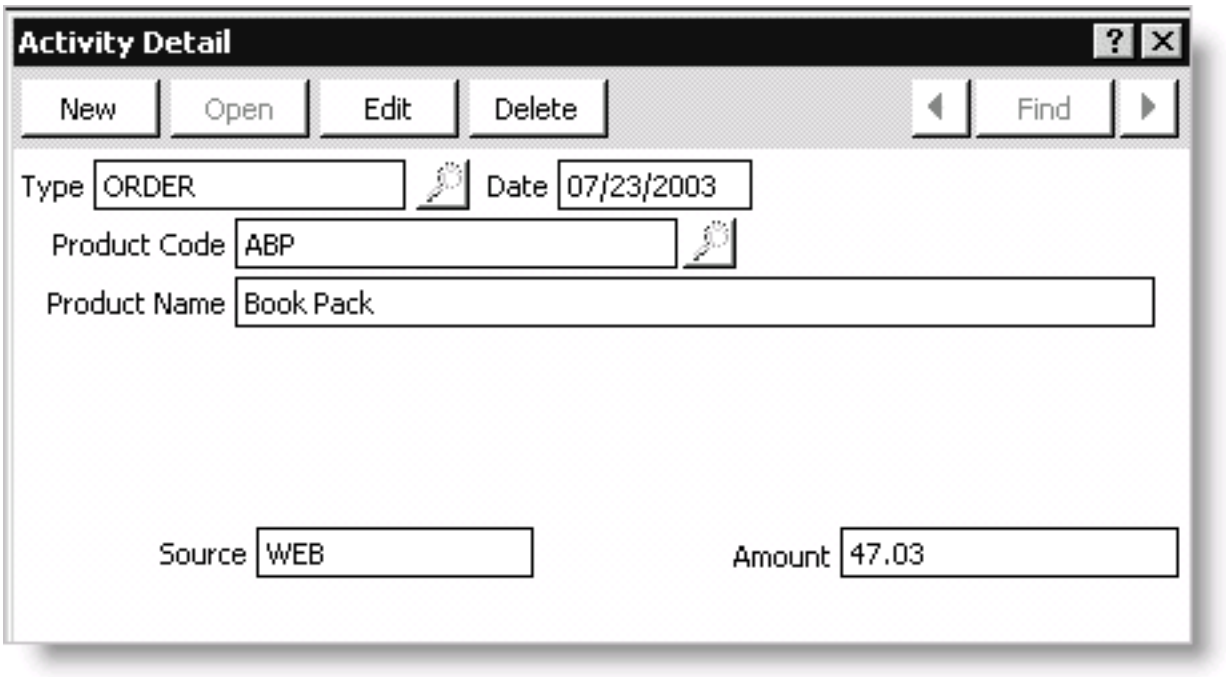
Enter and Edit Orders page

To view Web order activities

1. From Customers, select Manage customers to open the Manage customers page.
2. Open a customer's record.
3. Select the Activities-All tab in the History section.
4. Double-click an order activity line to open the Activity Detail window.



Activities-All tab



Activity Detail tab

Configuring Security

Overview of e-Series security

Security in e-Series is configured using security groups. Each security group allows the e-Series site administrator to grant different levels of access to the site and, ultimately, to the iMIS database.

Note: Configuring security groups is time-consuming, so plan accordingly.

e-Series supports up to 99 security groups. To simplify security group administration, you can do the following:

- Clone a security group
- Sort and organize by Access, Mode, Module, or Filter

The goal of this section is to give you the knowledge and skills necessary to configure security for your e-Series site.

After completing this section, you will be able to do the following:

- Create a security group
- Configure a security group
- Attach a security filter to a security group

Creating and Configuring Security Groups

The following items are required to successfully set up and configure security groups:

- e-Series installed on an active server
- Administrator authority and login ID for the application components
- Microsoft Internet Explorer 4.x (or later) or Netscape Navigator 4.x

With the e-Series security tool, you can identify groups of users who share similar access needs and requirements. Examples of these groups include the public, members of an organization, staff, regional offices, site administrators, and organization administrators.

The e-Series security feature allows you to create security groups and grant access authorization to specific modules and to individual fields within those modules.

Note: Although e-Series uses cookies, you do not have to worry about your customers' privacy because only the login is stored in a cookie.

To create or modify a security group, you must have authorization to access the Administrator security group and the administrative functions.

There are several considerations to keep in mind when setting up a security group:

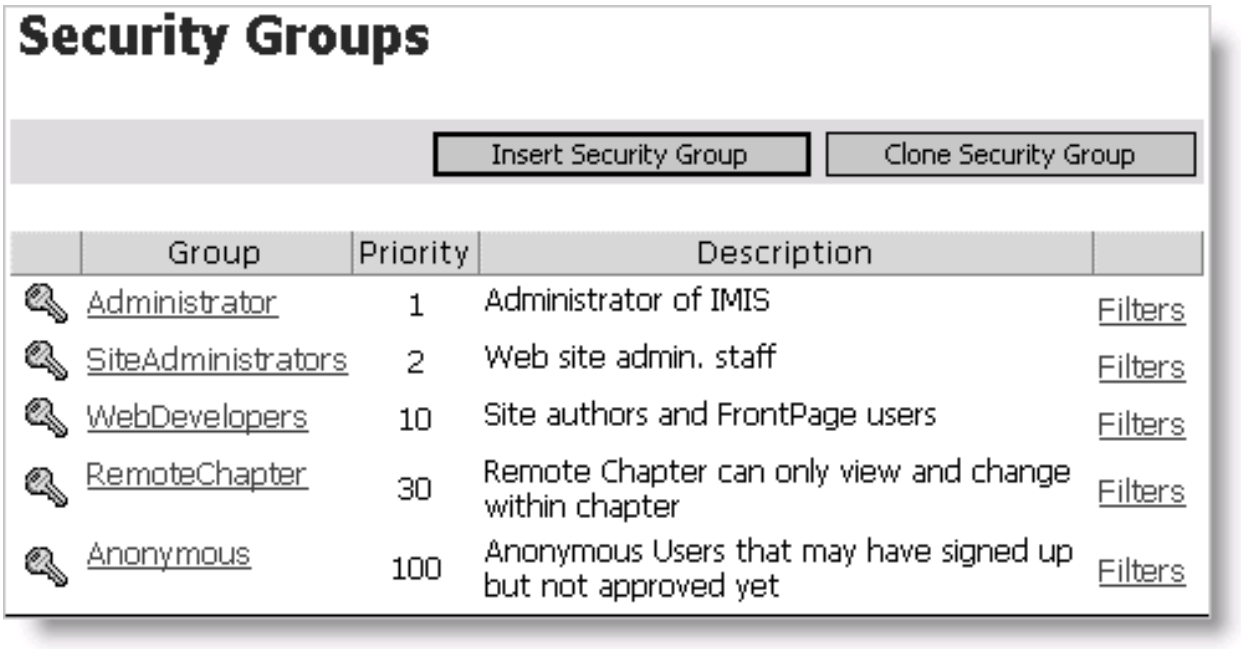
- When you run the Script wizards, the following default security groups are created: Anonymous, Administrator, Remote Chapter, Member, Site Administrator, and Web Developer. The Administrator and Anonymous security groups cannot be deleted.
- You can configure up to 99 security groups.
- You can create new security groups or you can clone existing groups.
- The Description field for a security group allows up to 255 characters.

- Security permissions for each group determine the data items the members of the group can view (Browse, Search) and change (Insert, Edit, Delete).
- A security group's privileges determine which individual or company records the group can access and what functions they can perform.

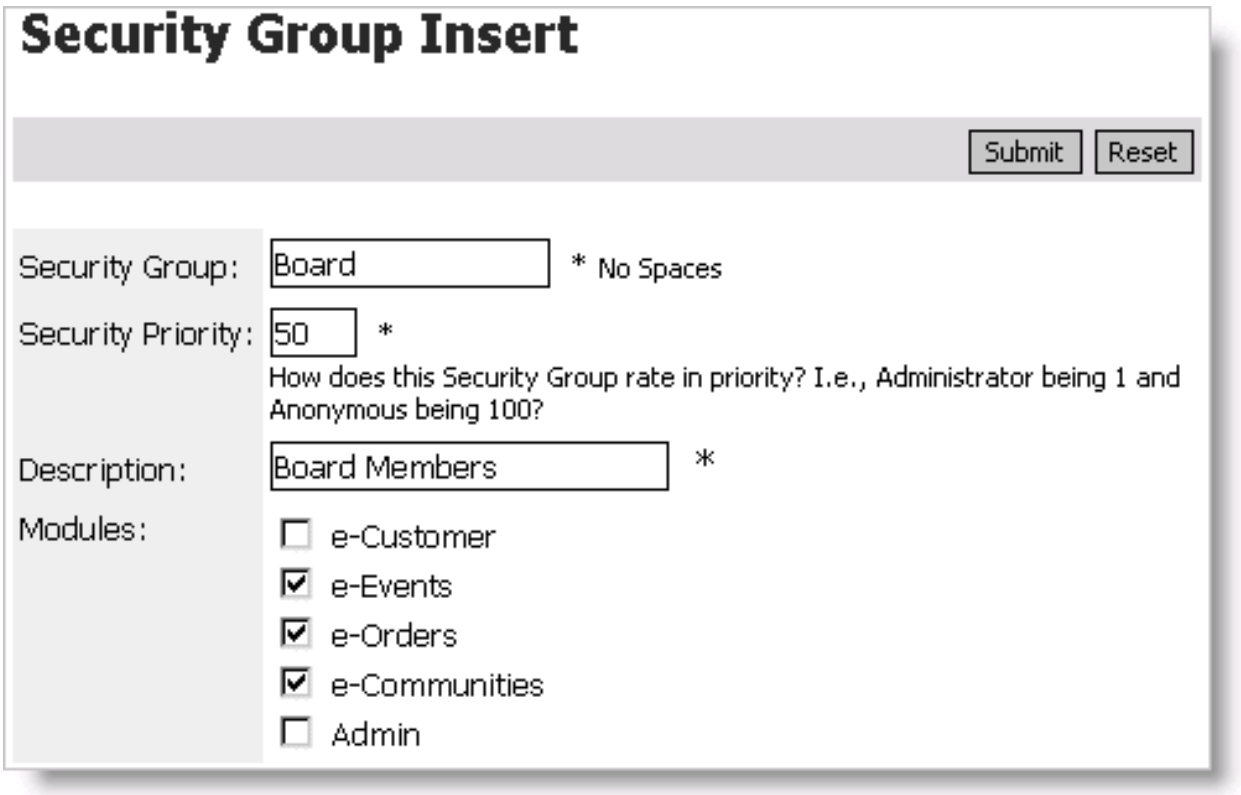
  Note: Although you can configure a security group so that its members may view member types and Paid Thru dates, those fields cannot be edited in e-Series. You can edit customer types and Paid Thru dates in iMIS only.

  To create a security group

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Security in the side index to display the list of default security groups.
4. Click Insert Security Group to display the Security Group Insert page.
5. Enter the name of the Security Group.
6. Enter the Security Priority. The priority number ranges from 1 = Administrator for full access to 100 = Anonymous for minimal access.
7. Enter a brief Description of the new security group.
8. Enable the Modules that this security group can access.
9. Click Submit. A message displays confirming that the security group information was inserted successfully.
10. Click OK to return to the Security Groups page.



Security Groups list

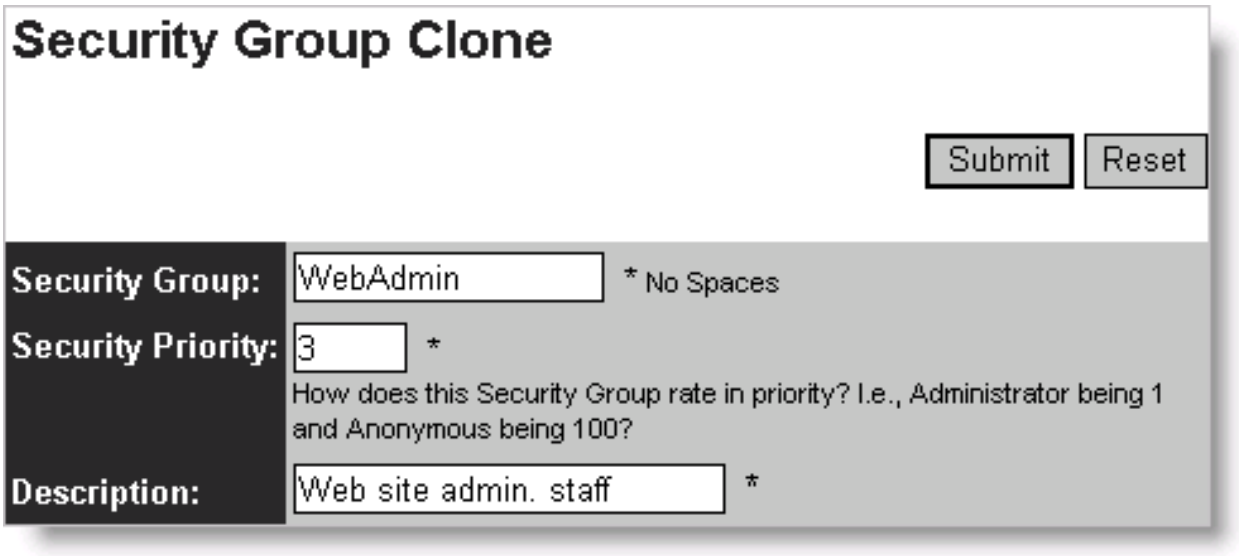


Security Group Insert page

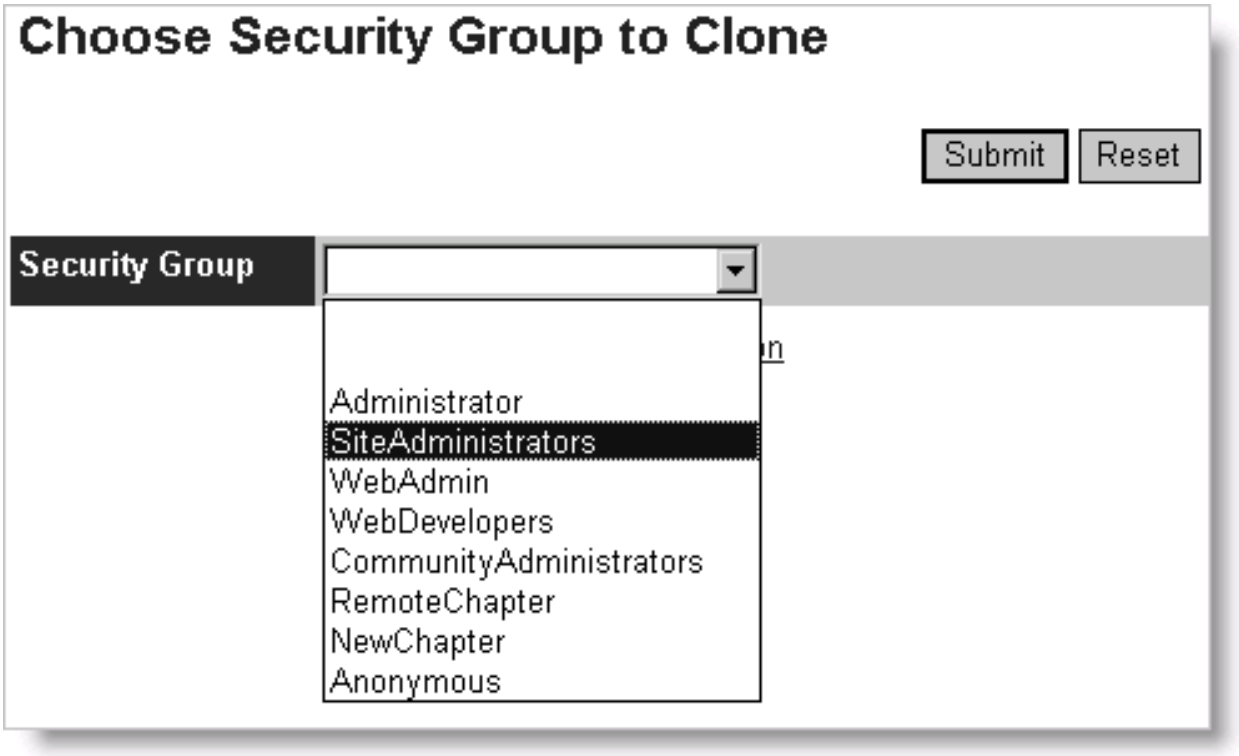
To clone a security group

Note: Sybase administrators cannot clone security groups and must create and configure new security groups as necessary.

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Security in the side index to display the list of default security groups.
4. Click Clone Security Group to display the Security Group Insert page.
5. Enter the name of the Security Group.
6. Enter the Security Priority. The priority number ranges from 1 = Administrator for full access to 100 = Anonymous for minimal access.
7. Enter a brief Description of the new security group.
8. Click Submit to open the Choose Security Group to Clone page.
9. Click the Security Group drop-down list and select the security group you want to clone.
10. Click Submit. A message displays confirming the security group information was cloned successfully.
11. Click OK.
12. The Detail Security filters and the modules the security group can access are the same as the cloned security group.



Security Group Clone page

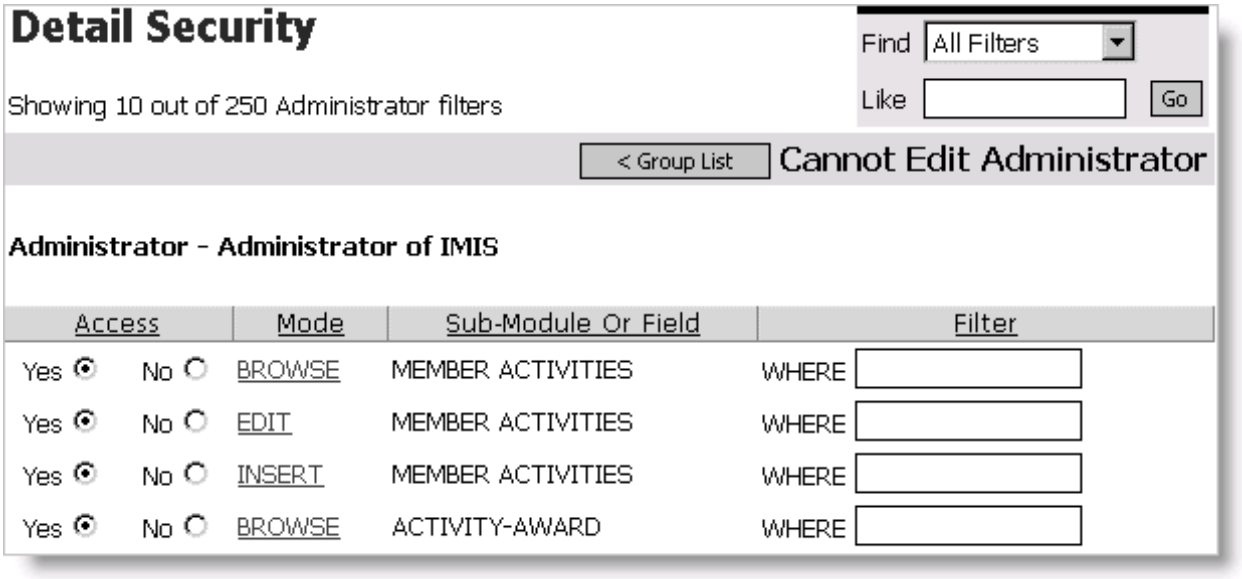


Chooser Security Group to Close page

Configuring a Security Group

Now that you have created a security group, the next step is to configure the security group. You will define the mode, sub-modules, and activities that members of that group can access. For example, you may allow the security group to view a record but not insert or edit a record.

Security groups are configured in the Detail Security page.



Detail Security page

Find

Select a security filter to view.

Like

Enter the title of the sub-module or field for which you are searching.

Go button

Used to perform the search.

Group List button

Used to return to the Security Group page.

Enable All button

Used to enable all security filters.

Disable All button

Used to disable all security filters.

Update All button

After you have edited the information, click this button to update all security filters.

Note: Clicking on the column headers will sort the filters by that column.

To configure a security group

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Security in the side index to display the Security Groups page.
4. Select a security group's Filters link to display the Detail Security page.
5. Find a specific activity or sub-module, or click Go to show all.
6. Configure the security group so that its members are able to view (Search and Browse), Insert, Edit, or Delete information.
7. Click the mode you have selected in each of the line items for the security group. The Detail Security Edit page displays.
8. Enable the Is this Security Detail Accessible? option if desired.
9. Leave the Which members are allowed Access? field blank to allow all members access to the security details.
10. Copy the filter definition that you want to use for the security of the line item selected (highlight and press Ctrl+C). Click Back to return to the Detail Security page.
11. Position your cursor in the appropriate field. Press Ctrl+V to paste the filter definition into the appropriate field in the Detail Security Edit page. If necessary, modify the filter definition.

12. Repeat steps 10 and 11 for each line item.
13. Click OK.

Allowing Anonymous Users to Search your Site's Directory

Security filters do not adapt easily to anonymous user access. The problem is that when a security filter is evaluated, the filter is thrown into a query that includes Name.ID-='#Client.ID#.' Since anonymous users do not have a Client.ID, the query will never return any rows.

A variable is created from the PreserveSingleQuotes (Variables.Filter) function that sets the AND criteria for search results, allowing search results to be returned for anonymous users.

If you want to allow anonymous users to search your site's Directory, only the Browse - Member filter should have a filter query; the Search - Member filter should not have a filter query.

For example, anonymous users will not be able to search your site's Directory if filter queries are defined for the following filters:

- Browse - Member: Name.MEMBER_TYPE='CM'
- Search - Member: Name.MEMBER_TYPE='CM'

The Search - Member filter is for page level security. If the Search - Member filter is enabled, anonymous users will not be able to access the search fields.

The Browse-Member filter is for record level security, and only the Browse - Member filter should have a filter query if you want anonymous users to have access.

Hands-on exercise: Configure the Member security group

Configure the Member security group you created in the previous exercise so that its members are:

- Able to View (Search and Browse) all aspects of their own member/contact record except notes, financial records, and relationships

- Able to Insert and Edit their own addresses, phone numbers, company name and ID, member security, and e-mail addresses
- Able to View (Search and Browse) another member record for name, company name and ID, address, fax, telephone numbers, and e-mail addresses
- Not able to View (Search and Browse) another member's home phone, home address, financial records, activities, relationships, notes, or meeting registration
- Not able to Insert, Edit, or Delete any data in any sub-module or field for another member's record
- Able to Register themselves for meetings

Setting up Security Filters

Security filters (sometimes referred to as WHERE clauses) allow the e-Series site administrator to display certain areas of a website only to a specified group of members. For example, an organization may want the logged-in user to view only their record information and no one else's. You can accomplish this by adding a security filter that states Name.ID='#Client.ID#'. The #Client.ID# variable has been created in ColdFusion and is used throughout the user's session.

View the list of available #Client.ID# variables in your /ScriptContent/appenv.cfm file.

Tip: Turn on ColdFusion debugging so you can see where the filter is being placed in the SQL query. You will then know what tables you can use, what format they should be in, and what they can do to maximize functionality.

Note: ColdFusion recognizes only the first variable and ignores all others. Therefore, use only one variable at a time.

When setting up Member Security on your e-Series page, you can use “where” clauses to narrow down the members' access to a feature. Any search condition available to your SQL Server can be used. List one ColdFusion parameter per where clause, and each parameter must be surrounded by pound signs (#).

The following are examples of where clauses with more detailed restrictions:

Name.ID='#Client.ID#' or '101'=Name.ID

Name.CO_ID = '101' and Name.MEMBER_TYPE = 'CM'

For members of a Security group to be able to change their login information on the web-site, you enable the following filters:

Browse - MEMBER SECURITY

where Name.ID = '#Client.ID#'

Edit - MEMBER SECURITY

where Name.ID = '#Client.ID#'

Browse - MEMBER-NAME SECURITY LOGIN

where Name.ID = '#Client.ID#'

Edit - MEMBER-NAME SECURITY LOGIN

where Name.ID = '#Client.ID#'

To attach a security filter to a security group

1. Log in to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Security in the side index to display the list of security groups.
4. Select the desired security group to display the Security Group Edit page.
5. Click Detail Security to open the Detail Security Edit page. Ten filters (by default) display on the page. The number of filters that display is set in the System Parameters.
6. Click on a Mode to open the Detail Security Edit page.
7. Enable the Is this Security Detail Accessible? option.
8. Leave the Which members are allowed Access? field blank. Leaving this field blank gives all members access to this security detail.
9. Copy a filter definition and click Back to return to the Detail Security page.

10. Select Paste or press Ctrl+V to paste the filter definition into the appropriate field on the Detail Security page.
11. Repeat steps 9 and 10 for each line item.
12. When you finish configuring the security group, click Update.
13. Click OK.
14. Select Admin> Lookups in the side index and click Update System Variables to update the security information.

Multi-Instance Filter e-Series

Browse filters are used on the multi-instance UD_DisplayList.cfm page.When viewing the Multi-Instance User Defined field, the max columns that display on the ud_dis-playdetailList.cfm page is four. If more than four columns were allowed to display, the user would have to scroll to the left to see the additional columns.

The UD_DisplayList.cfm page will use the security filter setting of the fourth field on the window for all fields on the window and will only display the first four fields. If you enable showfilter you can demonstrate that only the filter on the fourth field is used.

Customizing e-Series

Overview of e-Series site customization

e-Series provides you with the ability to customize the interface of your e-Series site in order to reflect the image of your organization. You have the ability to customize:

- Site styles
- Site options
- Prompts and labels
- Headers and footers
- The side index, top banner, and top navigation bar

The goal of this section is to give you the knowledge and skills necessary for customizing your e-Series site.

After completing this section, you will be able to do the following:

- Customize the e-Series interface
- Customize e-Billing
- Customize e-Communities
- Customize e-Customer Management
- Customize e-Events
- Customize e-Orders

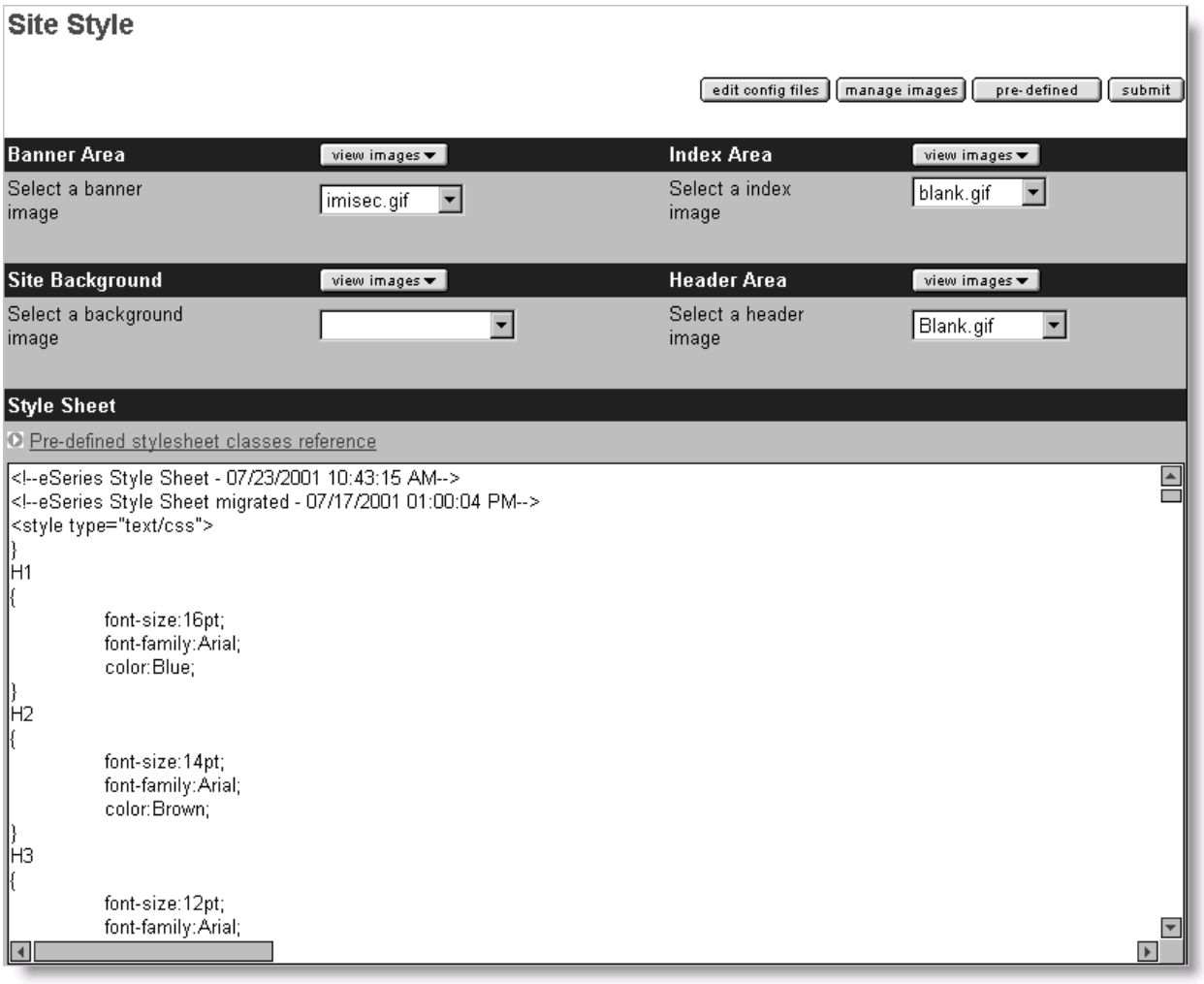
Customizing the e-Series Interface

This version of e-Series provides a style sheet structure (.css files) to specify display appearance. In addition, all e-Series modules have configuration files that allow you to customize onscreen text in prompts and labels.

This customization is accomplished through a user-friendly interface with edit capability. Or, you can download one of the pre-defined style sheets and edit it with an external style sheet editor using our defined style classes.

Image buttons are located in the Customer\Source\Images directory. Use an image editing tool such as Paint Shop Pro or Photoshop to change the text on a button image.

Site Style Page



Admin> Style Form> Edit Site Options

edit config files button

Opens the Module Config Files page and edit your sites configuration files.

manage images button

Opens the Manage Images - Upload page and upload images to your e-Series site.

pre-defined button

Opens the Pre-Defined Style page and select an existing style sheet template for your site.

Submit button

Click to submit any changes you have made to the site style.

Banner Area

view images button - Click to view the available banner images.

Select a banner image - Select a banner from the drop-down list.

Index Area

view images button - Click to view the available index images.

Select a index image - Select a index from the drop-down list.

Site Background

view images button - Click to view the available background images.

Select a background image - Select a background image from the drop-down list.

Header Area

view images button - Click to view the available header images.

Select a header image - Select a header image from the drop-down list.

Style Sheet

Pre-defined stylesheet classes reference - Click to display the pre-defined class names and the areas of the site where they are used.

Style Sheet Area - This area displays the active style sheet.

Button Bar

Select to activate the hover effect on normal form buttons.

To customize prompts, fields, and config variables

1. Log on to your e-Series site as an administrator.

2. Select Admin in the top navigation bar.
3. Select Admin > Style Form in the side index to display the Website Style and Prompts page.
4. Click Edit Config files to open the Module Config Files page.
5. Click the drop-down list and select the appropriate config file.

   The config file is opened in an edit box.
6. Edit the text within quotation marks to change the onscreen text. Use the scroll bars on the edit box to view more text if necessary.
7. On the upper right portion of the Module Config Files window, click submit changes to save the changes.

   A message informs you that site variables and styles have been updated.

   To customize site options

1. Log on to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin > Style Form in the side index to display the Website Style and Prompts page.
4. Click Edit Site Options to display the Site Style page or click download the body style sheet to use an external style sheet editor.
5. Click manage images to display the Manage Images - Upload page and upload images to your e-Series site.
6. Select the desired file destination from the drop-down list:

- Images
- Site Background
  - Header Area
  - Index Area
  - Banner Area

- Bullets
- Icons

- Source - images

7. Enter the image file name or browse to the file.
8. Click send to upload the image to your e-Series site. A message displays confirming that the image was uploaded.
9. Click the back button on your browser to return to the Site Style page.
10. Click pre-defined to select an existing style sheet template for your site: iMIS 10, ASI, Standard, or Black and White, and click submit. Click close to return to the Site Style page and make modifications to the pre-defined style sheet.
11. Select an image for the top of all pages from the banner image drop-down list. Click view images to view the available banner images.
12. Select an image for the top left area from the index image drop-down list. Click view images to view the available index images.
13. Select a background image from the drop-down list. Click view images to view the available background images.
14. Select an image for the top area of the body section from the header image drop-down list. Click view images to view the available header images.
15. The Style Sheet area displays the active style sheet. Click pre-defined style sheet classes references to display the pre-defined class names and the areas of the site where they are used.
16. Select whether to turn the Button Bar on or off to activate the hover effect on normal form buttons.
17. Click submit to save the changes. A message displays confirming that the style variables have been updated. Click OK.

    To customize the header and footer

You can customize the header and footer on your static pages.

1. Open the eSeries\Customer\ScriptContent\header.cfm or footer.cfm file with a text editor, such as NotePad or WordPad.

   Note: Do not open the header.cfm or footer.cfm files with FrontPage.

2. Modify the header or footer. You can copy and paste to modify the header or footer.
3. Save the changes and close the cfm file.

   To customize the top banner

   Change the size of the top banner or replace the banner with your own HTML page by modifying the Top.cfm file.

1. Open the Top.cfm file with a text editor, such as NotePad or Word Pad.
2. Change the following line:

   150<FRAMESET FRAMEBORDER-R=”0”FRAMESPACING=”1”border=”0”ROWS=”55”,*”>.

3. Save the changes and close the Top.cfm file.

   To customize the side index

   Change the width of the side index by modifying the Side_Index.cfm file.

1. Open the Side_Index.cfm file with a text editor, such as NotePad or Word Pad.
2. Change the following line:

   150<FRAMESET FRAMEBORDER-R=”0”FRAMESPACING=”1”border=”0”COLS=”150”,*”>.

3. Save the changes and close the Side_Index.cfm file.

Customizing e-Billing

You can extensively customize the display appearance and content of the e-Billing module by editing a set of text-based settings files. This section identifies the files you can

customize and explains the options in the module configuration file.

The settings files are all unencrypted and can utilize standard text, HTML, or ColdFusion to display customized content. The file names begin with an underscore (_) so that they sort to the top of the directory and are easy to identify.

Settings files

_addmessage.txt	Content displayed on the Add to Basket page
_duesoffmessage.txt	Content displayed when e-Billing is turned off in System Parameters
_editmessage.txt	Content displayed on the Edit Payment page
_ebillingconfig.txt *	Sets numerous instances of text, prompts, colors, and other formatting used repeatedly throughout the site.
_noduesmessage.txt	Content displayed on the Add to Basket page when the customer has not been billed for any dues items

Customizing e-Communities

e-Communities is an area where visitors with like interests can browse, learn, collaborate, and participate in discussions on a topic of common interest. The e-Communities module allows you to create and manage a wide variety of communities for your organization's website. You can define an unlimited number of communities to discuss a number of general interest topics, or you can facilitate a group setting such as a committee or board.

Visitors or members can view community news, contribute to discussion forums, and contribute or download shared documents.

Setting document archive default sort orders

You can configure the default sort order of e-Communities archived documents to be one of the following:

- FILE_NAME
- FILE_DESCRIPTION

- DATE_STORED
- FILE SIZE

  You can configure the default sort order of document archive folders to be one of the following:

- FOLDER_TITLE
- FOLDER_DESCRIPTION

  Use the Module Config Files window (see "To customize prompts, fields, and config variables") to find and modify the following lines in the eCommunities configuration file:

  <!--- Folder and File Sort--->

  <CFSET Application.Communities.DefaultFolderSort = "FOLDER_DESCRIPTION">

  <CFSET Application.Communities.DefaultFileSort = "DATE_STORED">

  To change date formats for e-Communities email

  You can set the e-Communities email date to the local date format by editing the emtyE-mail.txt file located in the /Source/Communities folder.

  Add a line as in the following example.

  <!---Change Client.System.DateMaskShort to mm-dd-yyy Example: 08-10-2002 --->

  <cfset Client.System.DateMaskShort = “dd/mm/yyy”>

  Note: Only edit this file if you are an experienced administrator and know the syntax requirements of ColdfUsion.

  To change the email notification colors

  If you use LISTSERV and you update the cmtyemail.cfm file, users will receive HTML e-mail notifications with color-coded cells as shown in the following example:

Advanced Solutions International, Inc.	
Forum: Crystal Reports	
Topic: Adding Crystal reports to iMIS Author: Douglas A. Hunt, Jr.	09/14/2001
Title: Adding Crystal reports to iMIS Author: Douglas A. Hunt, Jr.	09/14/2001
I'm having a problem adding a Crystal report to iMIS.	

To customize email notification colors

If you want to change the colors, modify the following section in the cmtyEmail.txt file (…\Source\Communities\CmtyEmail.txt):

<!---Header and footers contained in email body--->

<!---Change cell and text colors of html emails--->

To set the default remailing option for news item updates

1. Log on to your e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select e-Series in the side index to display the Lookups List page.
4. Select System Parameters from the menu at the top of the page to display the System Parameters page.
5. Select e-Communities from the menu at the top of the page to move to the e-Communities section
6. Select the Default setting for News Items to be re-emailed when edited option.

Setup for LISTSERV addresses for e-Communities

You can specify the LISTSERV email address options on the System Parameters page.

LISTSERV Public Respond Email Address

Appears in the From address of e-Communities email messages. If this is not specified, the From address field for e-Communities is left blank. This can cause email to bounce.

LISTSERV Private Respond Email Address

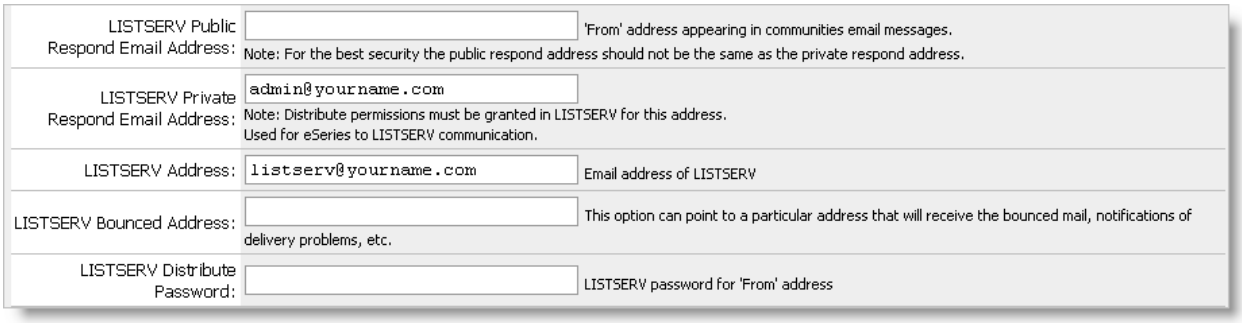
Specifies the From address for email directed to LISTSERV.

LISTSERV Address

Specifies the address used to send LISTSERV jobs (and LISTSERV commands) to the LISTSERV server address for LISTSERV email. This is the To email address for LISTSERV. This address is set when you install LISTSERV.

LISTSERV Bounced Address

Specifies the email address for bounced email. If you do not enter a value for this field, the LISTSERV Public Respond Email Address is used for returning bounced email.



System Parameters LISTSERV options

Customizing e-Customer Management

The _eCustomerConfig.txt file is the main location for specifying custom text, prompts, color, and formatting for the entire e-Customer Management module. Some of the settings by default accept site-wide application settings that are set in the _eSeriesConfig.txt file.

Customizing e-Events

e-Series provides configuration files for e-Events that allow you to customize prompts and labels.

e-Series provides web facilities for administrators to access configuration files with customizable prompts on the organization webserver. A new configuration file, _

eEventsConfig.txt, has been added to the Source/ModuleConfig directory, which can be selected from a list and edited through a text area provided by the interface. The configuration files are backed up when upgraded allowing the customization to be saved and migrated back into the site.

Only administrators or users with security privileges for the style options area access the interface to edit the configuration files for the e-Series site.

Number of Members Listed on Events Registration Page

You can specify the number of members listed in the drop-down list on the Events Registration page. By default the Members list is limited to 100. Modify either the Source/Meeting/Application.cfm file or the EventsConfig.txt file.

Place the maximum number of members you want to appear in the Members drop-down list by inserting the following line.

<cfset application. eventscoMembersSelectListMaxRows = “1000”>

You may substitute your maximum number for “1000”.

Note: You will see this drop-down list on the Events Registration page if you have enabled the Select option under the e-Event Registration ID Field Type. (Admin>Lookups>System Parameters>e-Events>e-Event Registration Type ID Field) The Select option allows you to register multiple company members.

Customizing e-Orders

You can extensively customize the display appearance and content of the e-Orders module by editing a set of text-based settings files. This section identifies the files you can customize and explains the options in the module configuration file.

The settings files are all unencrypted and can utilize standard text, HTML, or ColdFusion to display customized content. The file names begin with an underscore (_) so that they sort to the top of the directory and are easy to identify.

Settings files

_addressmessage.txt	Content displayed on the Shipping Address page above shipping address form entries

_applyproductsmessage.txt	Content displayed on the final Checkout page if products have not yet been applied to the basket
_contactmessage.txt	Body of the email message sent to the Membership contact when a customer indicates that they are interested in becoming a member
_customcontent.txt	Content displayed on the right side of the site pages under Search/Department/Product navigation
_moduleconfig.txt	Sets numerous instances of text, prompts, colors, and other formatting used throughout the site. See the following section for more information on this file.
_promoteareatext.txt	Content displayed when there are no products featured or set to promote in iMIS
_signonmessage.txt	Content displayed on the Sign on page above member login and new customer/account creation
_storeclosedmessage.txt	Content displayed when the e-Orders store is not set to open in the System Parameters
_welcomemessage.txt	Content displayed above the featured products when the customer navigates to Home
stylesheet.css	Style settings used throughout the e-Orders module. Not all colors and settings for this module come from this style sheet. For example, the color of table headings in the body of the e-Orders pages comes from the main StyleSheet.cfm file unless that is overridden in the _moduleconfig.txt file.

Hands-on Exercise: Change customization settings

The following exercise demonstrates how easy it is to change the customization settings. Note that you can develop any number of pre-designed _moduleconfig.txt files and simply replace the “standard” version with one of those replacements during the prototyping stage.

1. Rename the “..\Source\orders_moduleconfig.txt” file to “..\Source\orders__moduleconfig.org”.

2. Rename the "..\Source\orders_moduleconfig.new" file to "..\Source\orders__moduleconfig.txt".
3. Log back into the e-Orders module.

e-Series References

Setting up Registrant Class Fees in e-Events

How a Registrant Class is Assigned to a Registrant

How a registrant class is assigned to a registrant depends on whether the Copy Member Type to Registrant Class option is enabled or disabled in the e-Events System Parameters:

1. Copy Member Type to Registrant Class enabled - The registrant's customer type is copied to the registrant class ONLY if the registrant's customer type and registrant class match. For example, if a registrant has a customer type of A and a registrant class of A, then A will populate the Registrant Class drop-down list on the Event Registration page by default. If the registrant's customer type and registrant class do not match, then the following rule applies.
2. Copy Member Type to Registrant Class disabled (or enabled but no match exists between the registrant's customer type and registrant class) - The registrant class will default to either Member or Non-Member depending on whether the registrant is a member or non-member customer. The following rules dictate member pricing eligibility:

- If the Use Parent Company Pricing option is disabled (or the Company ID field (CO_ID) is not populated for the customer's record), then the registrant's own member status is used to determine which class is assigned. Otherwise, if the Use Parent Company Pricing option is enabled (and the Company ID field is populated for the customer's record), then the registrant's class is dependent on the member status of the parent company.
- If the Is a Member option is enabled for the registrant's (or parent company's) customer type in iMIS on the Set up customer types window (from Customers, select Set up module> Customer types), and the registrant's (or parent company's) customer status does

not begin with S, I, or D, then the registrant will be eligible for member pricing, and the registrant class will default to Member.

Allowing Users to Select a Registrant Class

Specific parameters can be set that allow users to select or override their Registrant Class when registering for events. This feature typically is reserved for an administrator and for specific security groups. The following parameters must be set to allow users to select or override their Registrant Class:

- Enable the Copy Member Type to Registrant Class option
- Disable the Disable Registrant Class field option
- Enable (Yes) the Meet Class Reg Over Ride security filter for user security group(s)

The Application.cfm file controls which registrant classes display in the Registrant Class drop-down list. By default, the drop-down list will include registrant classes that match the member types plus Member and Non-member.

Set the appropriate system variable options based on the following settings (...\Source\Meetings\application.cfm):

- Default setting - Only the Administrator security group can view Registrant Classes that do not have corresponding Member Types:

  APPLICATION.REGCLASSEXTGROUP_U = "NA"

  APPLICATION.REGCLASSEXTGROUP_G = "NA"

- All groups setting - All security groups can view Registrant Classes that do not have corresponding Member Types:

  APPLICATION.REGCLASSEXTGROUP_U = "All"

  APPLICATION.REGCLASSEXTGROUP_G = "NA"

- Specific group setting (only one) - Only the Administrator security group and the one other security group specified (in this case, Members) can view Registrant Classes that do not have corresponding Member Types:

  APPLICATION.REGCLASSEXTGROUP_U = "NA"

APPLICATION.REGCLASSEXTGROUP_G = "Members"

- Custom setting - Reads from a custom array to allow everyone the same Registrant Class view:

  APPLICATION.REGCLASSEXTGROUP_C = "Custom"

  The regclass.txt file (...\Source\Meetings\regclass.cfm) can be modified to set a list of hard coded registrant class options into an array that displays on the Event Registration page.

  Note: At a minimum, M and NM custom options should be used, and pricing should be defined on the Event Function Definition - Fees window (from Events, select Define an event, double-click an event, double-click an event function, click More, and select Fees). If a custom value is entered that does not have pricing set up and is selected during a registration, the registrant class pricing will default to General pricing.

Restricting Users from Selecting a Registrant Class

To prevent the Registrant Class drop-down list from displaying when the Copy Member Type to Registrant Class option is enabled, you have two options:

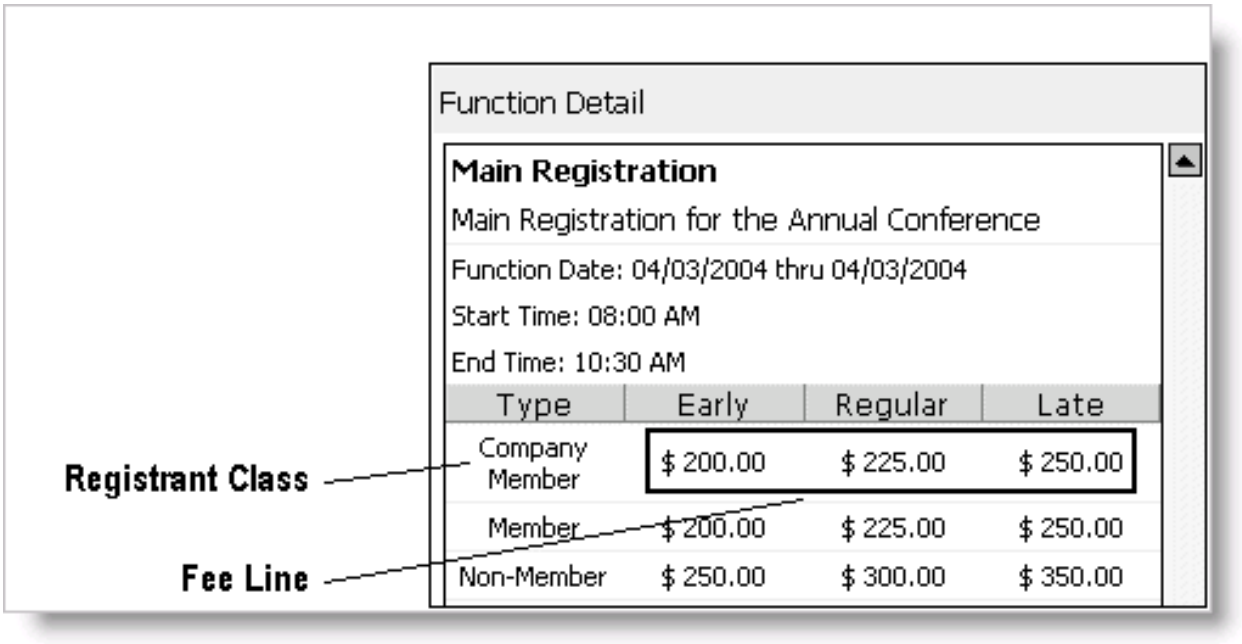
- Preventing all users from selecting a registrant class:
  Enable the Disable Registrant Class field option in the e-Events System Parameters to disable the Registrant Class drop-down list on the Event Registration page.

  Or

- Preventing security groups from selecting a registrant class:
  Disable the Meet Class Reg Over Ride security filter on the Detail Security page to prevent the Registrant Class drop-down list from displaying on the Event Registration page.

  By disabling the Meet Reg Class Over Ride filter, the Copy Member Type to Registrant Class parameter duplicates the functionality of the Copy Membership Type to Registrant Class option in iMIS without allowing customers to edit their Registrant Class when registering for events.

Reviewing the Function Detail section of the Event Registration page



Example of the Function Detail section of the Event Registration page

Registrant Class

The Description defined for the registrant class on the Set up registration classes window (from Events, select Set up tables > Registration classes) displays in the Function Detail section of the Event Registration page. If a Description is not defined for a registration code, the registrant Type will be blank in the Function Detail section. General displays for the Default registrant class if it displays in the Function Detail section.

Fee Line

A registrant class's fee line will display in the Function Detail section only if fees have been defined for the Registrant Class on the Event Function Definition - Fees window (from Events, select Define an event, double-click an event, double-click an event function, click More, and select Fees). If fees have not been defined for a specific Registrant Class or the Default registrant class, then no fee lines will display in the Function Detail section. The following is required on the Event Function Definition - Fees window for a fee line to display for a Registrant Class:

- The Comp option is enabled for the Registrant Class; or
- At least one of the fees (Early, Regular, or Late) is defined (non-zero) for the Registrant Class

Applying Fees to Registrants

The following rules govern which fees display in the Function Detail section and apply to a registrant:

- If fees are defined for the user's registrant class, then the fees defined for the user's registrant class apply.
- If fees are not defined for the user's registrant class, then the fees defined for the Default (General) registrant class apply (if defined).
- If fees are not defined for either the user's registrant class or the Default (General) registrant class, then no fee lines will display.

Displaying Registrant Class Fees in the Function Detail Section

This section summarizes the setup options required for displaying registrant class fees in the Function Detail section of the Event Registration page.

The function fees that display in the Function Detail section will depend on the following setup options:

- Copy Member Type to Registrant Class option - e-Events System Parameters (Admin> Lookups> System Parameters> e-Events)
- Disable Registrant Class Field option - e-Events System Parameters (Admin> Lookups> System Parameters> e-Events)
- Meet Reg Class Over Ride security filter - Detail Security page (Admin> Security> Filters)

These options can be enabled or disabled depending on the information you need displayed on the Event Registration page. The following are examples of four different displays:

Note: Refer to e-Events Registrant Class/Function Fees Setup Table for configurations.

To select the Registrant Class drop-down list and display all fees

- Enable the Copy Member Type to Registrant Class option
- Disable the Disable Registrant Class Field option
- Enable (Yes) the Meet Reg Class Over Ride security filter

  To disable the Registrant Class drop-down list and display all fees, including General

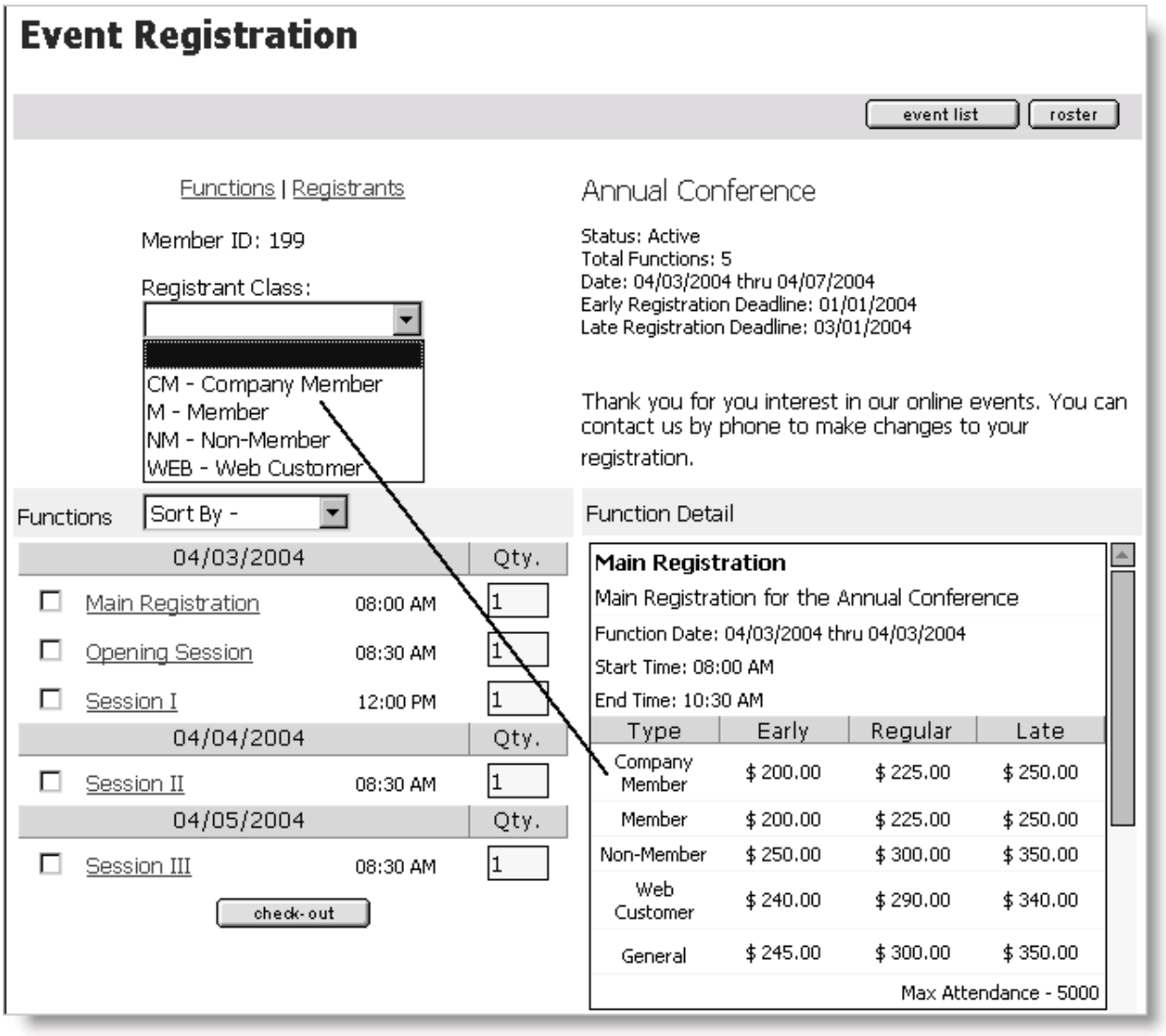
- Enable the Copy Member Type to Registrant Class option
- Enable the Disable Registrant Class Field option
- Enable (Yes) the Meet Reg Class Over Ride security filter

  To display the logged-in user's registrant class fees only

- Enable the Copy Member Type to Registrant Class option
- Disable the Disable Registrant Class Field option
- Disable (No) the Meet Reg Class Over Ride security filter

  To disable the Registrant Class drop-down list and display Member and Non-member pricing only

- Disable the Copy Member Type to Registrant Class option



Event Registration page showing all registrant classes and fees

Note: When the Registrant Class drop-down list displays, the listed registrant classes coincide with the registrant class fees that display in the Function Detail section of the Event Registration page. The General fee line displays in addition to the other registrant class fees if fees are defined for the Default registrant class on the Event Function Definition - Fees window in iMIS Events.

Restricting Users from Viewing Fees for Other Registrant Classes

To display only a logged-in customer's Registrant Class fees, enable the Copy Member Type to Registrant Class option in the e-Events System Parameters. Make sure the Meet

Reg Class Over Ride security filter is disabled (No) on the Detail Security page (Admin> Security> Filters).

e-Events Registrant Class/Function Fees Setup Table

The following table summarizes the system setup options that are used to display the Registrant Class drop-down list and registrant class fees on the Event Registration page:

Registrant Class drop-down list does NOT display Only Non-Member and Member fees display	Disabled	N/A	N/A
Registrant Class drop-down list does NOT display Only the fees defined for the logged-in user's registrant class display - If fees are not defined for the logged-in user's registrant class, then General (Default) fees display	Enabled	N/A (Enabled/Disabled)	Disabled (No)
Registrant Class drop-down list is disabled All defined registrant class fees display, including General (Default)	Enabled	Enabled	Enabled (Yes)
Registrant Class drop-down list displays All defined registrant class fees display, including General (Default)	Enabled	Disabled	Enabled (Yes)

Note: Enabling the Meet Reg Class Over Ride security filter causes the Registrant Class drop-down list to display (except when the Copy Member Type to Registrant Class option is disabled in the e-Events System Parameters). When the Registrant Class drop-down list is displayed, fees will be displayed for all registrant classes.

Customizing e-Series Scripts

Customizing e-Series Logins and Passwords

e-Series administrators have the ability to customize the logins and passwords that are generated when anonymous users sign up for an e-Series site. To modify the files in the ScriptContent directory, an administrator needs to know basic ColdFusion.

The following files can be modified in the ScriptContent directory:

1. genlogin.cfm - The default algorithm is the first letter of the first name concatenated with the last name, such as JDoe.
2. genpassword.cfm - The default algorithm is the first letter of the first name concatenated with the first letter of the last name concatenated with CFTOKEN, such as JD123456. CFTOKEN is a variable in ColdFusion that is unique to the user session.

   When customizing e-Series passwords using the genpassword.cfm, you can use only last name, first name, and email. No warning is given if invalid criteria are entered, which could result in an email being sent to every record in the database with a bad password.

   Note: The password algorithm requires a minimum string of at least six characters for a custom password to work correctly.

Customizing Confirmation emails

The text of e-Billing, e-Events, and e-Orders confirmation emails can be customized. Customizing the confirmation emails requires a working knowledge of ColdFusion and of how variables are created and appended.

All changes to the customizable email files should be tested before using them on a live site.

Customizable Files

Customizable files are located in the MailMessages folder of the ScriptContent directory. These editable files duplicate the encrypted source code that creates the confirmation email messages generated by the checkout process.

The following customizable files are located in the ScriptContent\MailMessages folder:

- eCheckOutMailContact.cfm
- eCheckOutMailRegistrant.cfm
- eCheckOutMailRegistrantAlt.cfm
- eCheckOutMailRegistrantAltContact.cfm
- eCheckOutOrderConfirmation.cfm
- vCheckOutAuthCode1.cfm
- vCheckOutAuthCode2.cfm
- vCheckOutChargeBy.cfm
- vCheckOutDues1.cfm
- vCheckOutDues2.cfm
- vCheckOutEventAdlInfo.cfm
- vCheckOutEventLineItems.cfm
- vCheckOutHeader1.cfm
- vCheckOutHeader2.cfm
- vCheckOutOrder.cfm
- vCheckOutOrderFullNameAddr.cfm
- vCheckOutOrderLineItems.cfm
- vCheckOutOrderShipInfo1.cfm
- vCheckOutOrderShipInfo2.cfm

- vCheckOutOrderTotal.cfm
- vCheckOutOrderTotalAll.cfm
- vCheckOutPurchaseComments1.cfm
- vCheckOutPurchaseComments2.cfm

Files that are prefixed with a 'v' contain an email's body text variables that are built during the checkout process. These files are then used by the confirmation email files generated for customers.

Files that are prefixed with an 'e' are the confirmation emails generated by the checkout process. These files contain the ColdFusion email functionality in combination with the variable files built during the checkout process.

In addition to the confirmation emails, the emails sent to a customer contact when a customer's record is updated also can be customized:

- cMemberProcessEditText.cfm
- cMemberProcessInsertText.cfm

To handle errors

Error handling has been built into the checkout process for each call to a customizable file.

Error handling is used when building confirmation emails, and an email is sent to the webmaster when an error is encountered. If an error is encountered in a customizable file, then the default confirmation email code will be used; the original code has not been removed from the checkout process.

The following is an example of the try/catch code:

cftry

call the customizable file 'vCheckOutHeader1.cfm'

cfset MailMessageType = 'custom'

cfcatch

cfset MailMessageErrorFound = 'vCheckOutHeader1.cfm'

use default email content fragment

/cfcatch

/cftry

When an error is caught, an email containing the problem file(s) will be sent to the site webmaster.

The confirmation email messages can be debugged by setting 'client.emailDeBug = 1.' If the variable 'client.emailDeBug' is set to 1, then the name of each customizable file used to build the confirmation emails will be appended to the section in the email to which it relates, helping identify the areas that need to be reworked or modified.

To customize and test files (suggested method)

1. Enable email debugging:

- Create a new file (setdbug.cfm) in the ScriptContent directory.
- Add the following line:

  <cfset client.emailDeBug=1>

- Save the new file.
- Call the new file (http://yourservername/scriptcontent/setdbug.cfm) through the web browser to enable debugging.

2. Test a confirmation email:

- Log in to your e-Series site as a customer that has an email address set up so that you can receive a confirmation email.
- Walk through any combination of an e-Billing, e-Events, or e-Orders purchase. Make sure to submit an order and complete the checkout process so that a confirmation email is generated.

- Verify the information in the confirmation email. After each section in the confirmation email is a line containing the name of the customizable file. The following is an example of a confirmation email:

  = Billing =

  Billing Total : $ 95.00

  Pay Date : 06 / 04 / 2002

  Summary : Mandatory Dues Total, PAC Contribution

  EMAILDEBUG - above info generated from vCheckOutDues2.cfm

- Note the section's file name that you want to modify.

3. Modify the file:

- Go to your e-Series site's ScriptContent\MailMessages folder.
- Open the file you want to modify.
- Make your modifications.
- Save your changes.

4. Test the modified confirmation email:

- Log in to your e-Series site as a customer that has an email address set up so that you can receive a confirmation email.
- Walk through any combination of an e-Billing, e-Events, or e-Orders purchase. Make sure to submit an order and complete the checkout process so that a confirmation email is generated.
- Verify the information in the confirmation email.
- Repeat as often as necessary until the changes to the confirmation email are correct.

5. Back up all of your changes once you verify that they are correct in case they are lost during a future upgrade.

Viewing Available e-Series Variables

To view a list of available e-Series variables, place the following into the footer.cfm found in the ScriptContent folder:

<CFDUMP var+"#application#">

This will display all the application variables. In addition, the following variable can be used to view a list of session variables:

<CFDUMP var="#session#">

Note: Make sure you remove the variable from footer.cfm. Otherwise, all application or session variables will be viewable by all e-Series users until the variables are removed.

Removing Security Filters for UserDefined Windows in e-Series (Sybase only)

If you add a new user-defined window or modify an existing user-defined window, you will have to run the Update_Security_Cursors_Sybase.sql script located in the \Source\Scripts directory. Running this script will not remove the existing security filters for the user-defined window; they must be manually deleted using iSQL.

Displaying alternative currency data in e-Series

You can configure e-Series to display alternative currency by selecting the Display Alternative Currency option (see "Setting Web System Parameters") on the System Parameters page in the e-Series admin portal (From e-Series Admin portal, Admin > Lookups > System Parameters).

The database stores the available currencies and the related exchange rates. The e-Series customer can choose the preferred currency from a drop-down list on the web pages that display price listings.

Note: The base currency that is displayed by default is set in the Base Currency Code drop-down list on the e-Series System Parameter page.

Preparing for updating exchange rate data

Before making any changes to the exchange rate data,

- The multi-currency feature in e-Series needs to be disabled (From e-Series Admin portal, Admin > Lookups > System Parameters)
- Or, the website service needs to be stopped using IIS.

This prevents e-Series users from seeing incorrect rates if you are changing their selected exchange rate or the base currency rate. It will also prevent an error if the user's selected currency is removed.

To disable the alternative currency feature

1. Login to e-Series with a login that is in the Administrator security group.
2. Navigate to the Administration section (From e-Series Admin portal, Admin > Lookups > System Parameters).
3. In the Web section, disable the Display Alternative Currency option.
4. Click Update.
5. Click the Update System Variables link at the top of top of the page so the change will take effect.

Modifying the exchange rate script

After the Display Alternative Currency option has been turned off or the website service has been stopped in IIS, edit the sample SQL, script_Exchange_Rate_and_Iso_Currency_Codes_values.sql, and apply it to the iMIS database.

Note: Download the script, insert_Exchange_Rate_and_Iso_Currency_Codes_values.sql, from the Tech Support Community in the product portal (Go to My Home Page > Community Home Page > View Document Archive > Downloads > iMIS 15 Tools > insert_Exchange_Rate_and_Iso_Currency_Codes_values.sql).

1. Open SQL Query Analyzer.
2. Login as an SQL user that has write permissions to the Iso_Currency_Codes and Exchange_Rate tables in the iMIS database.
3. Make sure you are running on the iMIS database.
4. While in Query Analyzer open the script. insert_Exchange_Rate_and_Iso_Currency_Codes_values.sql
5. Edit the script to reflect the current exchange rates.

   www.ecb.int/stats/exchange/eurofxref/html/index.en.html

6. Either view the exchange rates on the web page or choose to export them to your preferred format.
7. Remove the insert statements for any currencies you do not wish to show.
8. Update the ExchangeRateHistory portion of the script to use your iMIS ID. The ExchangeRateHistory table is used to keep a record of previous exchange rates. For example if your iMIS ID is 2000, you would update the statement to look like the following:

   INSERT ExchangeRateHistory (Ex_Hist_Id, CurrencyCode, ExchangeRate, ValidFrom, ValidTo)

   SELECT '2000', CurrencyCode, ExchangeRate, LastUpdateDate, @now FROM Exchange_Rate
9. Update the insert statements for the Exchange_Rate table accordingly.

   For, example, if the current exchange rate for United States Dollars is 1.2550, the insert statement for this row should be changed from:

   INSERT Exchange_Rate (CurrencyCode, ExchangeRate, LastUpdateDate) VALUES ('USD',1.23460,@now)

   Change to this code:

   INSERT Exchange_Rate (CurrencyCode, ExchangeRate, LastUpdateDate) VALUES ('USD',1.25500,@now)
10. Execute the script.
11. Once the script if finished executing,

- The Display Alternative Currency checkbox in e-Series can be turned back on (From e-Series Admin portal, Admin > Lookups > System Parameters.)
- Or, the web site can be restarted.

Managing e-Series Optional Features

Additional Site Functionality

The following procedures are integrated into iMIS to further simplify the development of the website. You may choose to use other methods of employing this functionality.

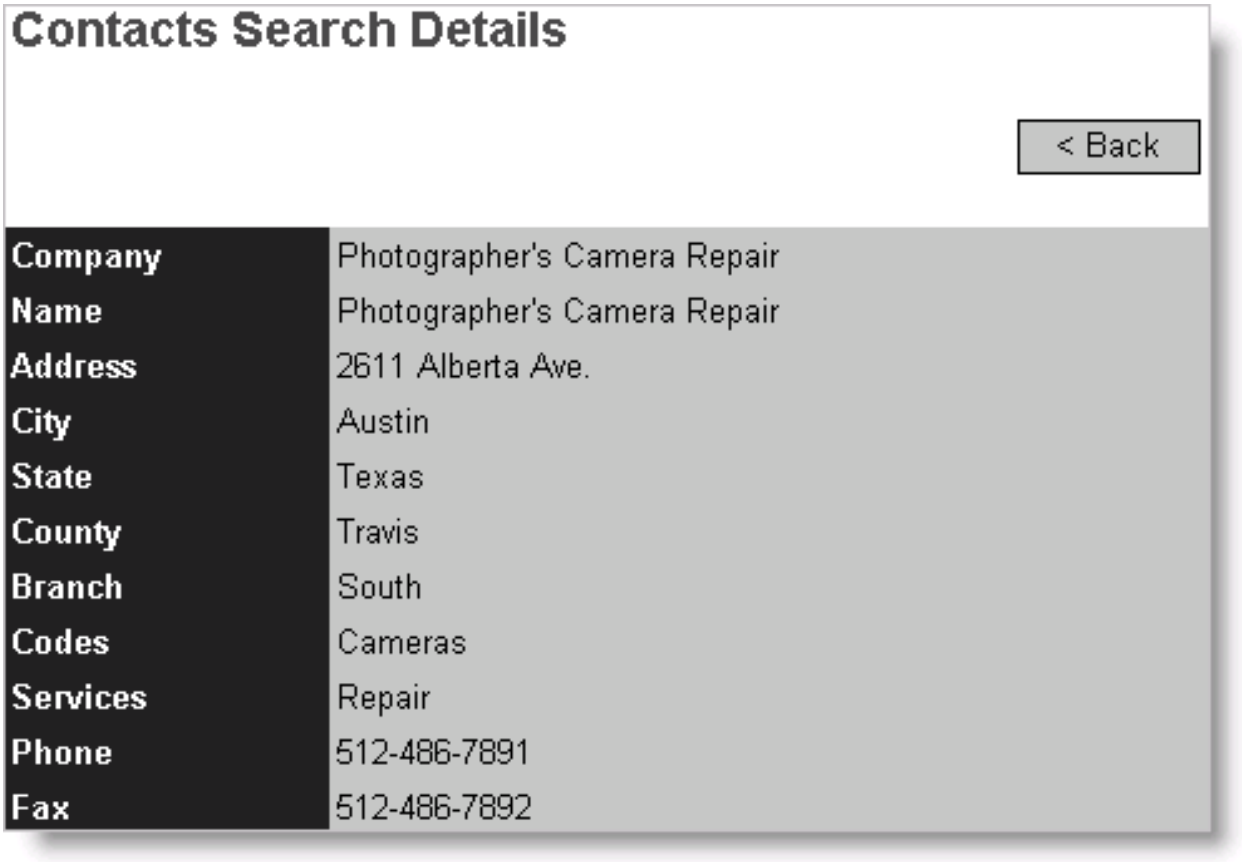
- Additional Site Functionality
- Searching for Contacts
- Inserting Contact Search Information
- Subscribing to an email List
- Creating and Managing E-mail Lists
- Submitting Comments
- Defining Comment Types and Managing Comments
- Setting up the JUMP_LIST
- Viewing Pages
- Creating Page Types
- Creating a Page or Document
- Creating URL Types
- Viewing the Links List
- Setting Up and Managing the Links List
- Creating Pay Types
- Creating Relationship Types

Searching for Contacts

The Contacts Search page lists the contacts that your site's administrator wants you to be able to find. These contacts can include any related organizations, industries, businesses, or individuals that may be of interest or relevance to you.

To search for a contact

1. Select Home in the top navigation bar.
2. Select Home> Contacts to open the Contacts Search page.
3. Enter the specific search criteria.
4. Click Search to open the Contacts Search Results page.
5. Select the contact to open the Contact Search Details page.



Contacts Search Details

Inserting Contact Search Information

e-Series allows you to set up a Contacts Search page that is accessible to all users from your site's Home page. The Contacts Search page lists the contacts that you want your users to be able to find. These contacts can include any related organizations, industries, businesses, and individuals that would be of interest or relevance to users of your site.

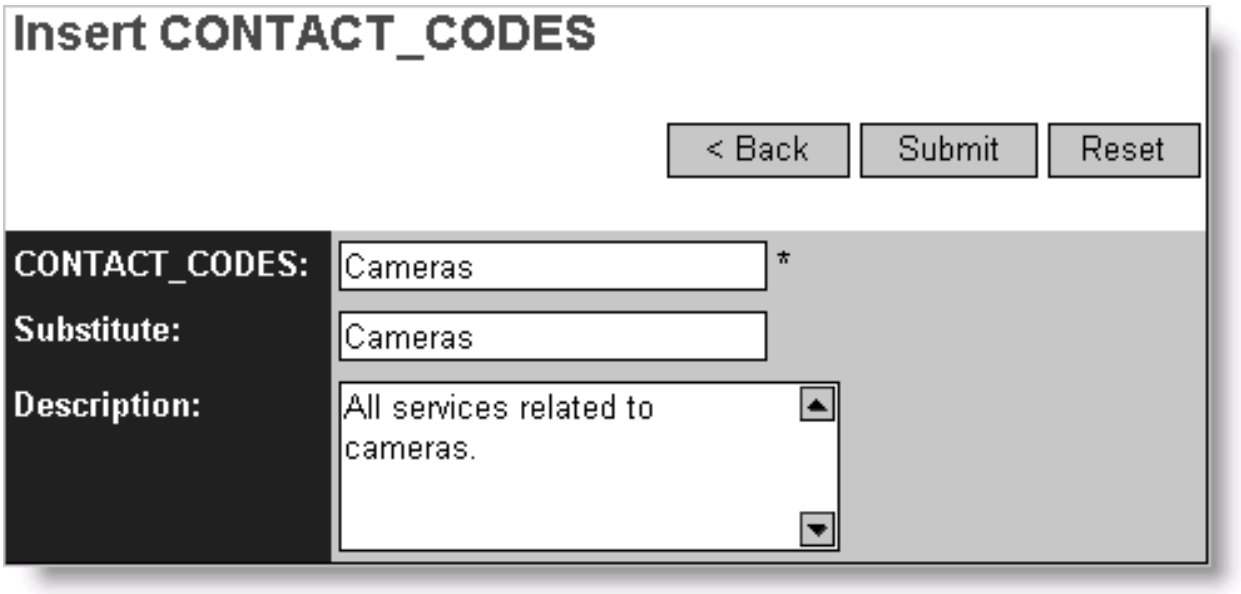
Setting up the Contacts Search page involves three steps:

1. Entering the contact codes
2. Entering the contact services
3. Entering the contacts

To enter a contact code

The contact codes that you enter should be general enough that related services can be grouped under them. For example, if your organization is associated with photography, you could enter codes such as Cameras, Film, and Lighting.

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select CONTACT_CODES to open the CONTACT_CODES List page.
5. Click Insert CONTACT_CODES to open the Insert CONTACT_CODES page.
6. Enter a provider search code in the CONTACT_CODES field.
7. Re-enter the provider search code in the Substitute field. The value entered in the Substitute field is the value that displays in the Codes drop-down list on the Contact Search page.
8. Enter a Description of the provider search code.
9. Click Submit.
10. Click OK.



Insert CONTACT_CODES page

To edit or delete a contact code

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select CONTACT_CODES to open the CONTACT_CODES List page.
5. Select the contact code that you want to edit to open the Edit CONTACT_CODES page.
6. Make any necessary edits.
7. Click Update or Delete.
8. Click OK.

To enter a contact service

The contact services are the specific services provided by the contacts listed in the Contacts Search page.

1. Log in to the e-Series site as an administrator.

2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select CONTACT_SERVICES to open the CONTACT_SERVICES List page.
5. Click Insert CONTACT_SERVICES to open the Insert CONTACT_SERVICES page.
6. Enter a provider search service in the CONTACT_SERVICES field.
7. Re-enter the provider search service in the Substitute field. The value entered in the Substitute field is the value that displays in the Services drop-down list on the Contact Search page.
8. Enter a Description of the provider search service.
9. Click Submit.
10. Click OK.

Insert CONTACT_Services page

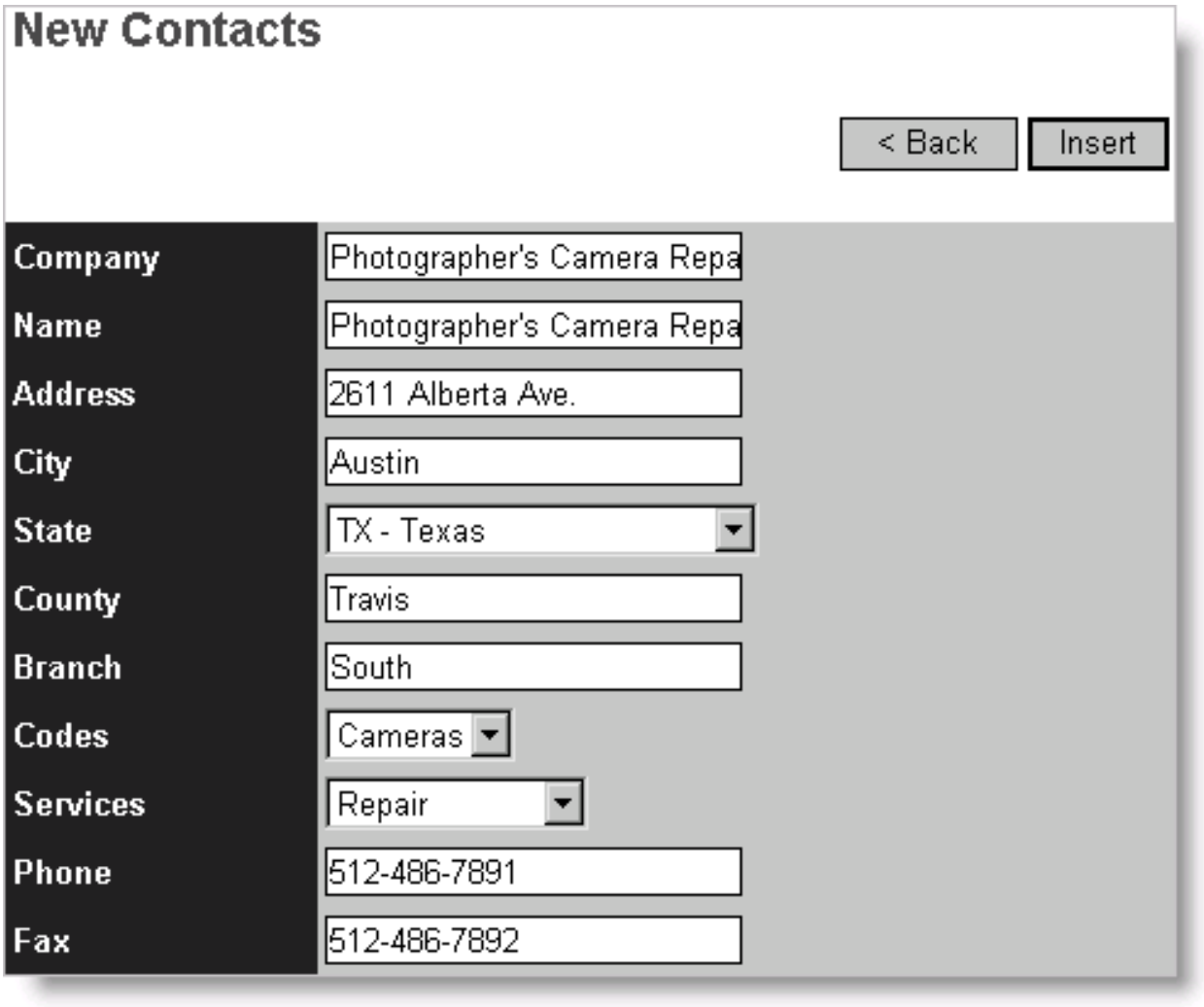
To edit or delete a contact service

1. Log in to the e-Series site as an administrator.

2. Select Admin in the top navigation bar.
3. Select Admin> Lookups in the side index to display the Lookup Lists page.
4. Select CONTACT_SERVICES to open the CONTACT_SERVICES List page.
5. Select the contact service that you want to edit to open the Edit CONTACT_SERVICES page.
6. Make any necessary edits.
7. Click Update or Delete.
8. Click OK.

To enter a new contact

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Contacts in the side index to open the Contacts Search page.
4. Click New Record to open the New Contacts page.
5. Enter the contact's information. Be sure to select provider search Codes and provider search Services.
6. Click Insert.
7. Click your browser's back button to return to the New Contacts page.



New Contacts page

To edit or delete a contact

1. Log in to the e-Series site as an administrator.
2. Select Admin in the top navigation bar.
3. Select Admin> Contacts in the side index to open the Contacts Search page.
4. Enter the specific search criteria.
5. Click Search to open the Contacts Search Results page.
6. Select the contact to open the Contact Search Details page.

7. Make any necessary edits.
8. Click Update or Delete.
9. Click your browser's back button to return to the Contact Search Details page.

Subscribing to an email List

You can subscribe to an email distribution list managed by your site's administrator. Users who subscribe to the list will receive broadcast letters and messages.

To subscribe to an email list

1. Log in to your e-Series site.
2. Select Home in the top navigation bar.
3. Select Home> Email List in the side index to open the Email List page.
4. Select the email list that you want to subscribe to and click Enlist.
5. Click OK.

Email List for contact

To unsubscribe from an email list

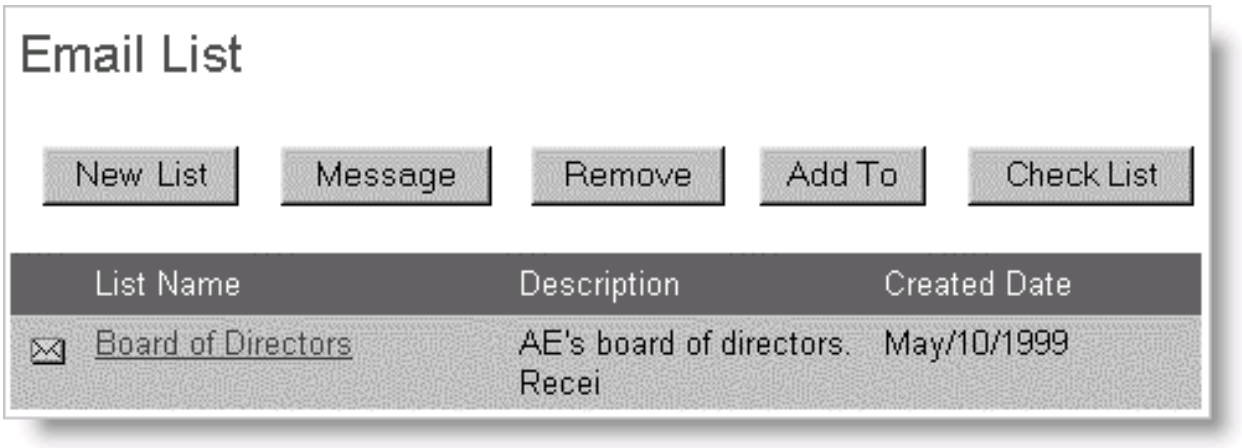
1. Log in to your e-Series site.

2. Select Home in the top navigation bar.
3. Select Home> Email List in the side index to open the Email List page.
4. Select the email list that you want to unsubscribe from and click Remove.
5. Click OK.

Creating and Managing Email Lists

The email distribution list is similar to a broadcast fax list distributed through email. Customers can review, subscribe to, and unsubscribe from an email list. When customers subscribe to a list, they receive messages sent to the list. Usually, only the staff is responsible for creating and distributing messages to enrolled customers; however, any security group can be given access to this feature. Access is granted through the Security Detail feature.

The email list displays in the Email List page. Additions and edits to the lists are made on this page.



Admin > Email List

New List button

Opens the Create New Email List page.

Message button

Opens the Send to Email List page.

Remove button

Opens the Remove from Email List page.

Add To button

Opens the Add to Email List page.

Check List button

Opens the Registration Totals page and view the total number of individuals registered for each of the email lists.

List Name

All available email lists are listed in this column.

Description

A brief description of the email list displays in this column.

Created Date

The created date for the email list displays in this column.

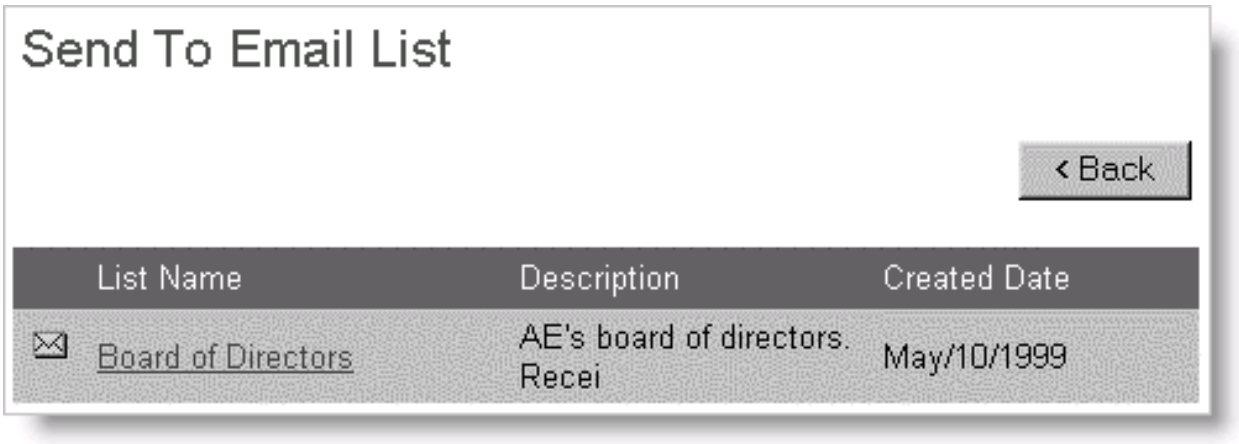
To create an email list

1. Select Admin in the top navigation bar.
2. Select Admin> Email List in the side index to display the Email List page.
3. Click New List to display the Create New Email List page.
4. Enter the List Name and Description.
5. Click Submit.
6. Click OK to return to the Email List page.

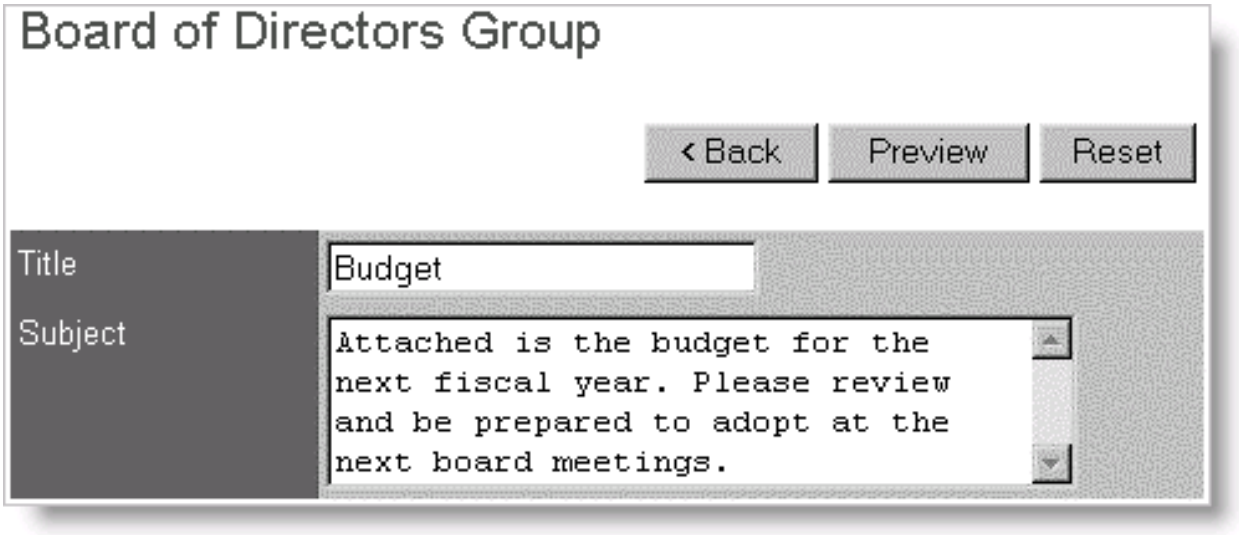
Create New Email List page

To create and send an email message

1. Select Admin in the top navigation bar.
2. Select Admin> Email List in the side index to display the Email List page.
3. Click Message to display the Send To Email List page.
4. Select a List Name to display the List Name page.
5. Enter the Title and Subject.
6. Click Preview to view the message.
7. Click Send.
8. Click OK.



Send To Email List page



Board of Directors Group page

To remove a customer from an email list

1. Select Admin in the top navigation bar.
2. Select Admin> Email List in the side index to display the Email List page.
3. Click Remove to open the Remove from Email List page.
4. Enter the customer's ID in the text box next to the name of the email list. Click Member ID to search for the customer's ID.
5. Click Remove.

To add a customer to an email list

1. Select Admin in the top navigation bar.
2. Select Admin> Email List in the side index to display the Email List page.
3. Click Add To to open the Add to Email List page.
4. Enter the customer's ID in the text box next to the name of the email list. Click Member ID to search for the customer's ID.
5. Click Enlist.
6. Click OK.

To check an email list

1. Select Admin in the top navigation bar.
2. Select Admin> Email List in the side index to display the Email List page.
3. Click Check List to open the Registration Tools page.
4. Select a list name to view the subscribers to the email list in the Registered page.

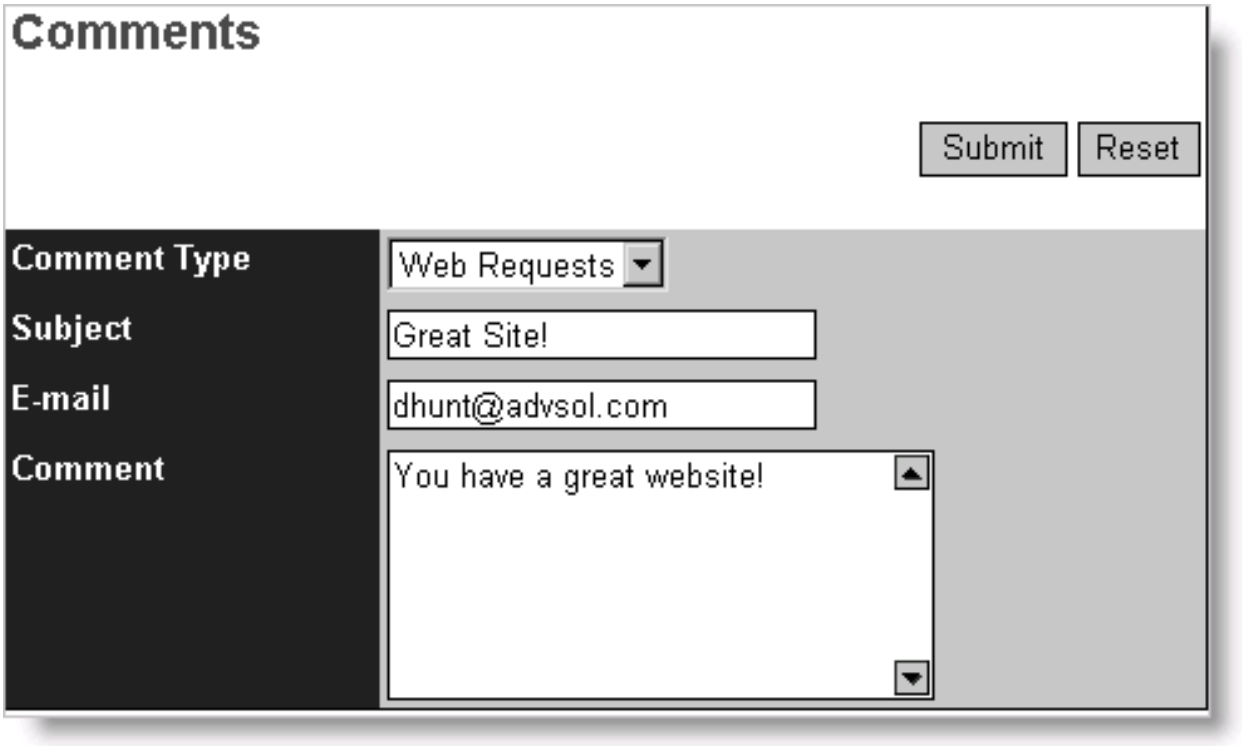
Submitting Comments

You can submit comments and feedback about the website through the Comments page. You will receive an automatic reply for any submitted comment.

To submit a comment

1. Select Home in the top navigation bar.
2. Select Home> Comments in the side index to display the Comments page.
3. Select a Comment Type from the drop-down list.
4. Enter the Subject of the comment.
5. Enter the E-mail address of the individual submitting the comment (defaults to the logged in member's email address).
6. Enter a Comment.

7. Click Submit.
8. Click OK.



Comments page

Defining Comment Types and Managing Comments

Most Websites contain one or more hyperlinked email addresses that allow users to submit comments and feedback on your site. Submitted comments are stored in the Comments_Log table of the iMIS database. This gives your organization flexibility in how comments are managed. When managing the comments, staff members can review, reply, archive, share, and delete comments.

Users who submit comments receive an automatic reply from the server, and a designated staff member receives an email notice every time a comment is submitted by a user.

To review a comment

Administrators can review submitted comments.

1. Select Admin in the top navigation bar.
2. Select Admin> Comments in the side index to open the Comments Types page.
3. Select a comment type to open the Web Comments page. The title that displays on the Web Comments page will be the same as the name of the comment type.
4. Select a web comment to open the Review Comments page and review the submitted comment.

To delete a comment

1. Select Admin in the top navigation bar.
2. Select Admin> Comments in the side index to open the Comments Types page.
3. Select a comment type to open the Web Comments page.
4. Select a web comment to open the Review Comments page.
5. Click Delete.
6. Click OK.
7. Click OK.

To respond to a comment

1. Select Admin in the top navigation bar.
2. Select Admin> Comments in the side index to open the Comments Types page.
3. Select a comment type to open the Web Comments page.
4. Select a web comment to open the Review Comments page.
5. Click Respond.
6. Enter a Comment that you want to send to the user.
7. Click Send.
8. Click OK.

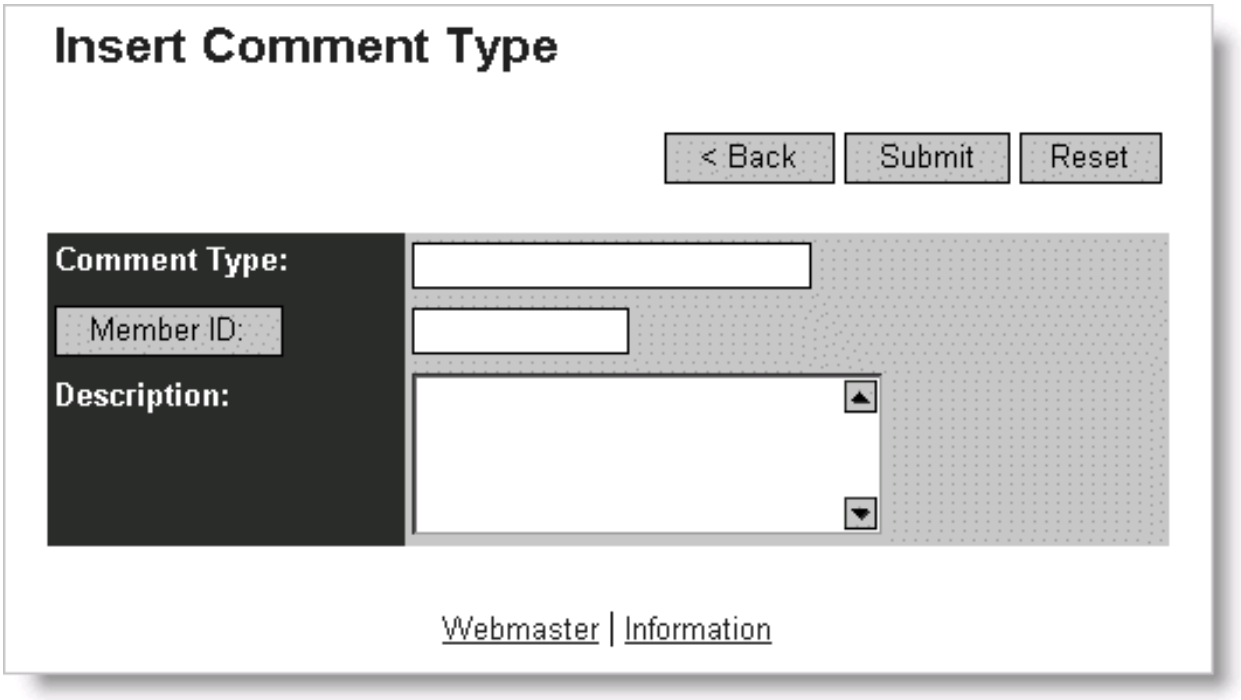
To archive a comment

1. Select Admin in the top navigation bar.
2. Select Admin> Comments in the side index to open the Comments Types page.
3. Select a comment type to open the Web Comments page.
4. Select a web comment to open the Review Comments page.
5. Click Archive.
6. Click OK.

To create Comment Types

1. Select Admin> Lookups in the side index to display the Lookup Lists page.
2. Select COMMENT_TYPES to display the Comment Type List page.
3. Click Insert Comment Type to display the Insert Comment Type page.
4. Enter a Comment Type.
5. Enter the Member ID of the organization's contact person. This contact person will receive an email notification every time a comment is submitted.
6. Enter the comment type Description.
7. Click Submit. A message displays confirming that the comment type information was inserted successfully.
8. Click OK.

Comment Type List page



Insert Comment Type page

To view links

1. Select Home in the top navigation bar.
2. Select Home> Links in the side index to display the Links page.
3. Select a link Type to view a categorized list of links.
4. Select a Link to display the site in your browser.

Offsite Companies Links

Setting up the JUMP_LIST

The JUMP_LIST is a drop-down list of links that you can set up for your users. These links can be to internal locations within your site or they can be to other Web sites. Once set up, the JUMP_LIST displays in the top navigation bar on the right hand side and is accessible by all users.

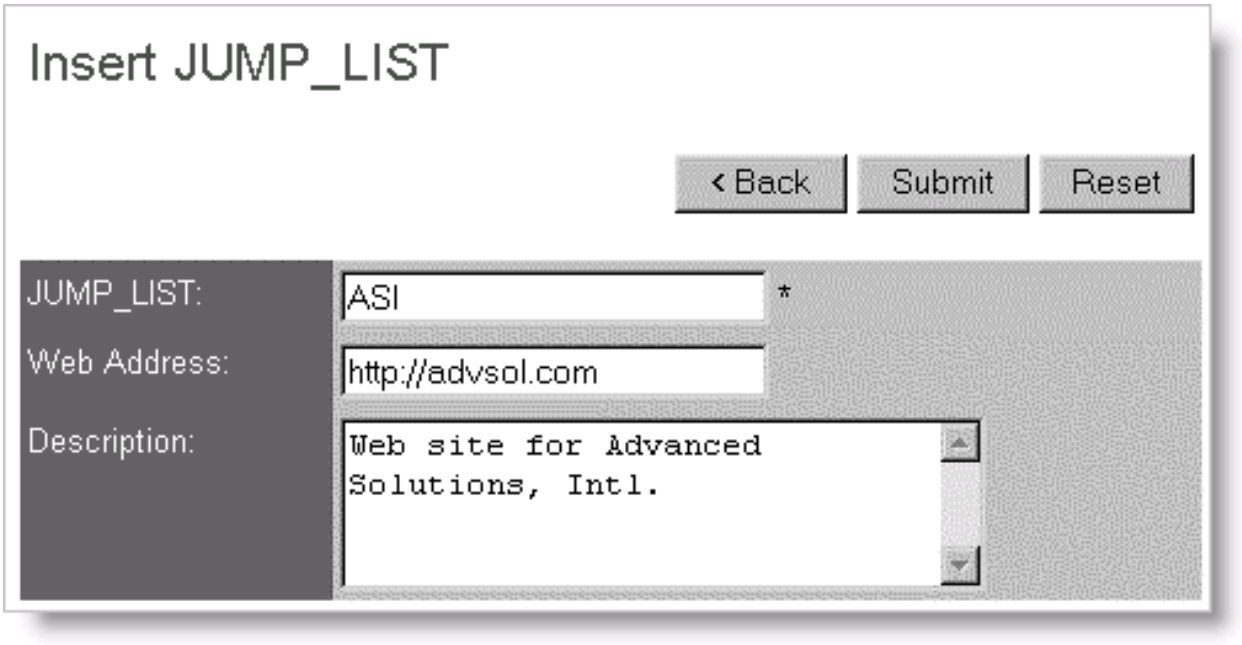
JUMP_List displayed

To insert new JUMP_LIST entries

1. Select Admin in the top navigation bar.
2. Select Admin> Lookups in the side index to display the Lookup Lists page.
3. Select JUMP_LIST to display the JUMP_LIST List page.
4. Click Insert JUMP_LIST to display the Insert JUMP_LIST page.
5. Enter a name in the JUMP_LIST field.
6. Enter the URL and the Description of the jump list.

Note: You must enter the entire URL and include the http:// protocol designation.

7. Click Submit. A message displays confirming that the jump list information was inserted successfully.
8. Click OK to return to the JUMP_LIST List page.
9. Click Back to return to the Lookup Lists page.
10. Click Update System Variables.
11. Click OK.



Insert JUMP_LIST page

Viewing Pages

The Pages function allows you to view documents created for your site. These documents can include topics that are unique to your organization as well as press releases and industry articles.

To view pages

1. Select Home in the top navigation bar.

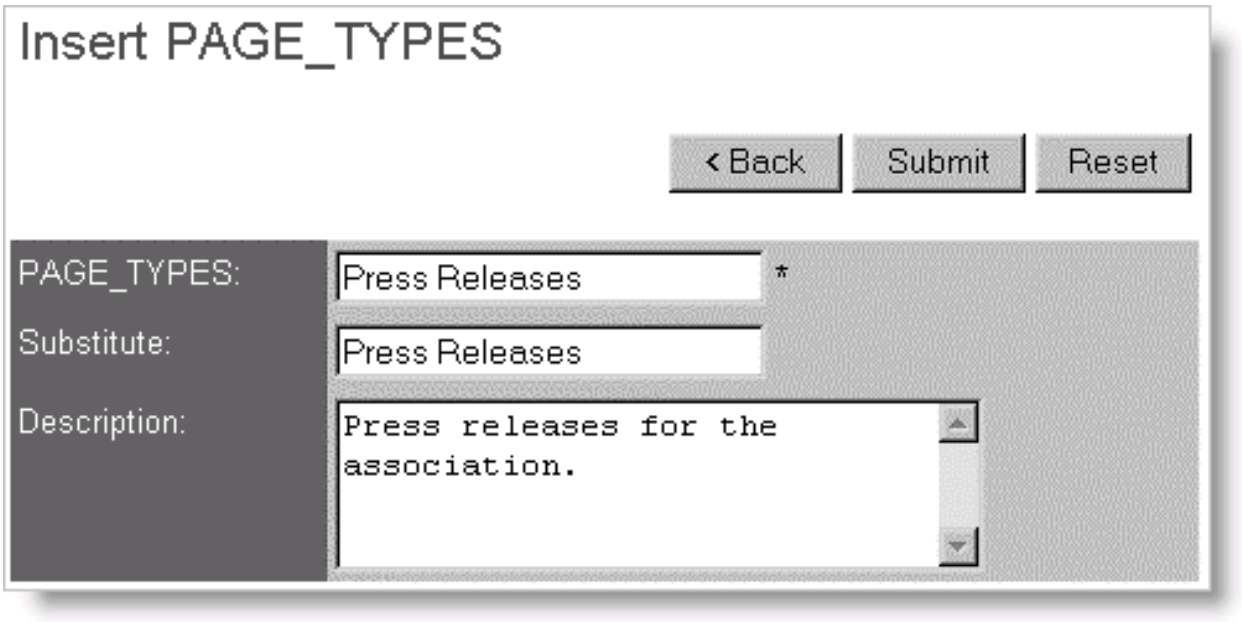
2. Select Home> Pages in the side index to open the Pages page.
3. Select a page Type to view a list of pages.
4. Select a page Title to view the page in your browser.

Creating Page Types

A database of documents is available for your site. The default label for this feature is Pages. It can be changed to “News Items”, “What's New,” “Documents,” or anything that suits your organization. You can easily insert a document into the Pages area without learning HTML or any other programming or markup language. You can also create a library of page types that are unique to your organization such as press releases and industry articles.

To create a page type

1. Select Admin> Lookups in the side index to display the Lookup Lists page.
2. Select PAGE_TYPES to open the PAGE_TYPES List page.
3. Click Insert PAGE_TYPES to open the Insert PAGE_TYPES page.
4. Type the name of the page type in the PAGE_TYPES field. This is a required field.
5. (optional) Enter a Substitute title and a Description.
6. Click Submit. A message displays confirming that the page types information was inserted successfully.
7. Click OK.

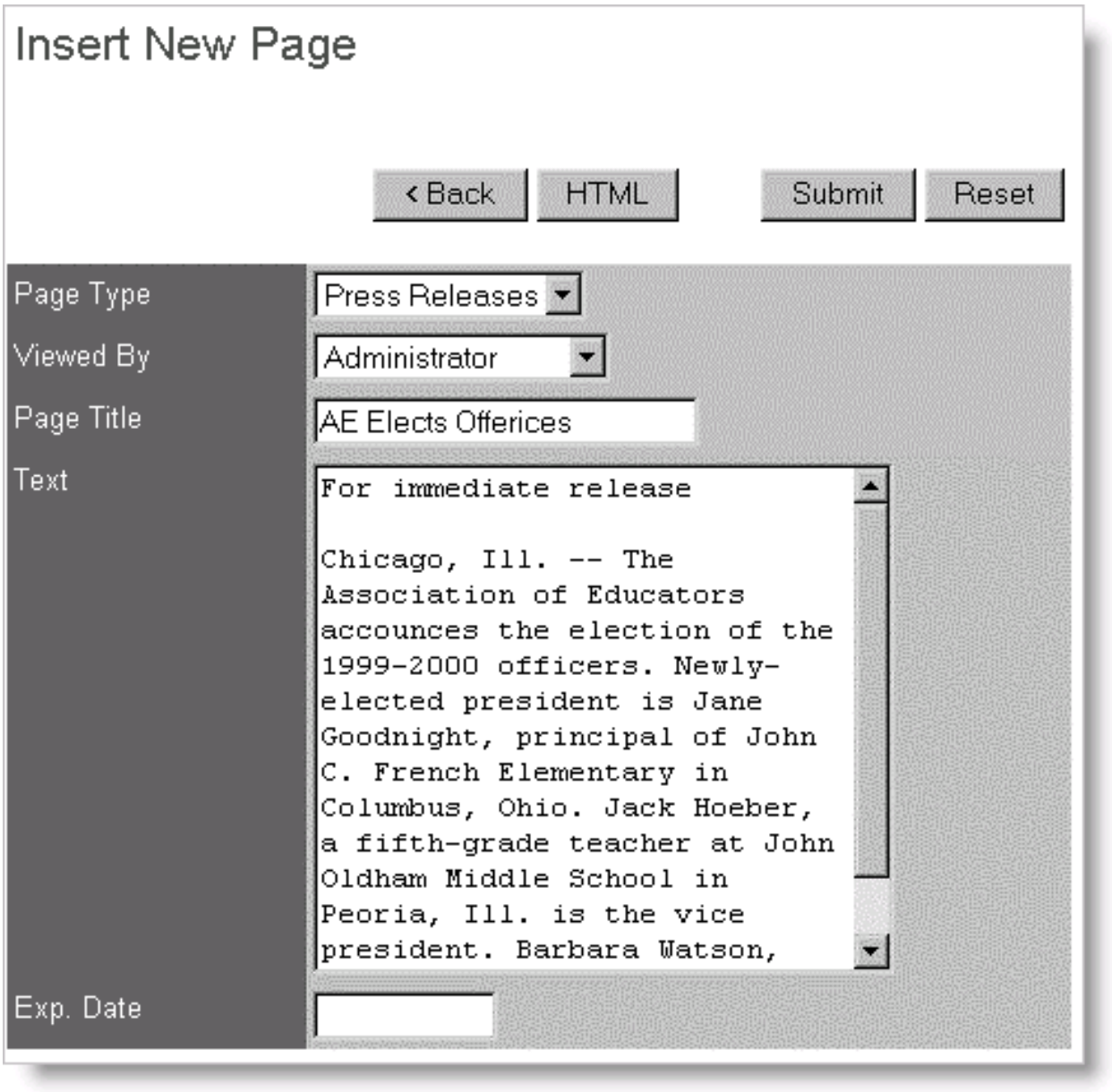


Create a PAGE_TYPE page

Creating a Page or Document

After creating a page type, you can create specific pages and documents such as press releases and industry articles. When you create a page or document, select the security group that will view the document and assign an expiration date to the document. After the expiration date has passed, only the site administrator can view the page or document.

Create the page or document in the Insert New Page.



Admin> Pages, click New Page

Page Type

A list of available Page Types created in the Lookups page

Viewed By

Select the security group(s) that can view the Page Type.

Page Title

Enter the name of the page.

Text

Enter the text of the page document.

Exp. Date

Enter the date that the Page expires.

Back button

Go back to the previous page.

HTML button

Locate an HTML file to attach.

Submit button

Submit the Page Type information.

Reset button

Clear the information.

To create and publish a new page

1. Select Admin> Pages in the side index to display the Pages page.
2. Highlight a page type from the Type list. This is the page type you created earlier.
3. Click New Page to display the Insert New Page.
4. Select a Page Type from the pull-down list.
5. Select a security group from Viewed By list of options. This allows you to select the security groups that are allowed to view documents. For example, there may be some pages that you want only the staff and administrator to see, but you may want to make other pages available to everyone.
6. Enter the Title of the document.

7. Enter the Text of the document. You can copy and paste from word processing applications and browsers.
8. Assign an expiration date and click Submit.

   Note: If you have access to the electronic version of a document, copying and pasting it is the quickest way to publish a page.

   You can also publish the following items in the Page publishing area:

- HTML code
- ASCII text
- PowerPoint presentations
- Adobe.pdf documents and files
- Images
- Hyperlinks

The font size of the document title can be modified in the Style Options.

Note: If you change the font size, it will also change font sizes in other locations on your site.

Alternatively, you can use HTML tags to enlarge the font size of titles or to implement special effects such as bold or italic fonts.

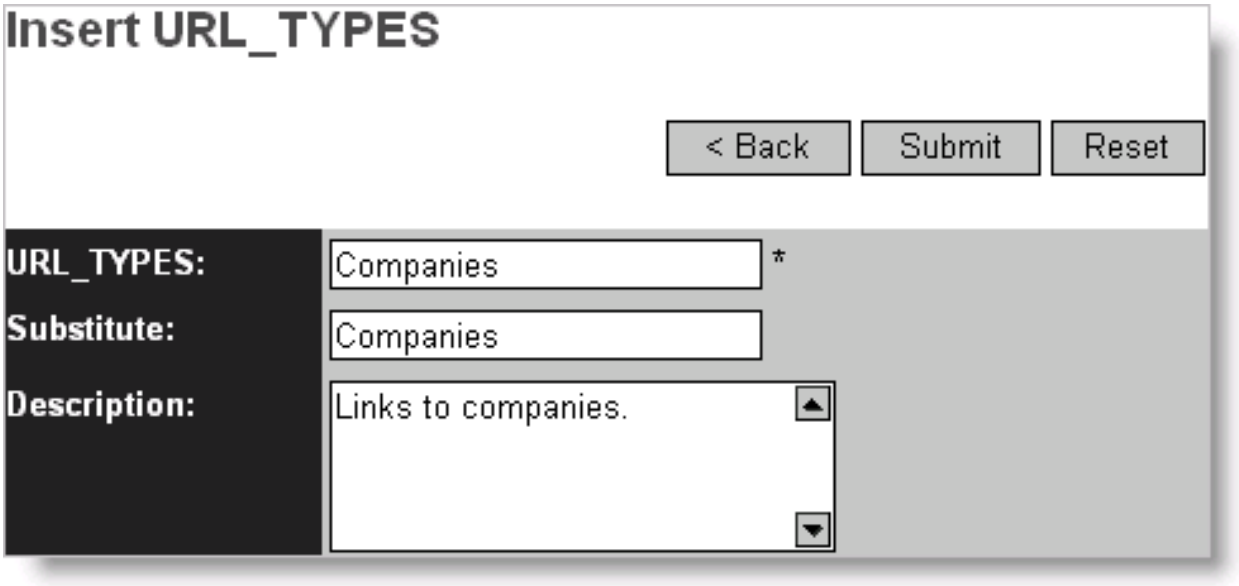
Creating URL Types

The URL or link types that you create are used to categorize the links that display in the Links page. The Links page lists the URLs or links to sites that you think may be of interest or relevance to your customers or staff. As you add links, you can categorize them according to URL type.

To create a URL type

1. Select Admin in the top navigation bar.

2. Select Admin> Lookups in the side index to open the Lookup Lists page.
3. Select URL_TYPES to display the URL_TYPES List page.
4. Click Insert URL_Types to display the Insert URL_TYPES page.
5. Enter the URL_Types.
6. (optional) Enter the Substitute and the Description. The Description that you enter displays in the Links page that the user sees.
7. Click Submit.
8. Click OK.



Insert URL_TYPES page

Viewing the Links List

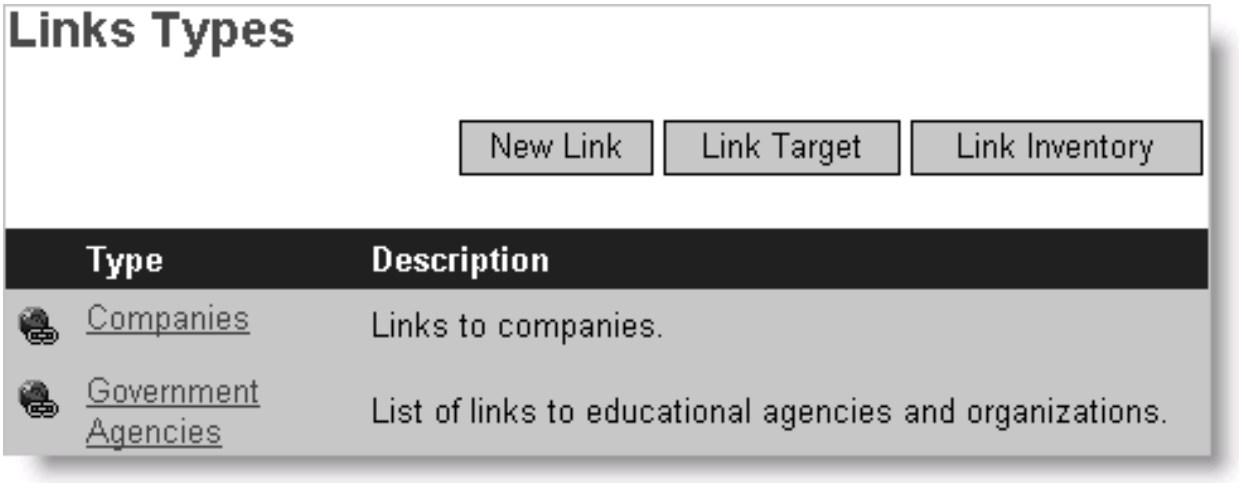
The Links List is a list of URLs (links) to websites that your site's administrator thinks may be of interest or relevance to you.

Setting Up and Managing the Links List

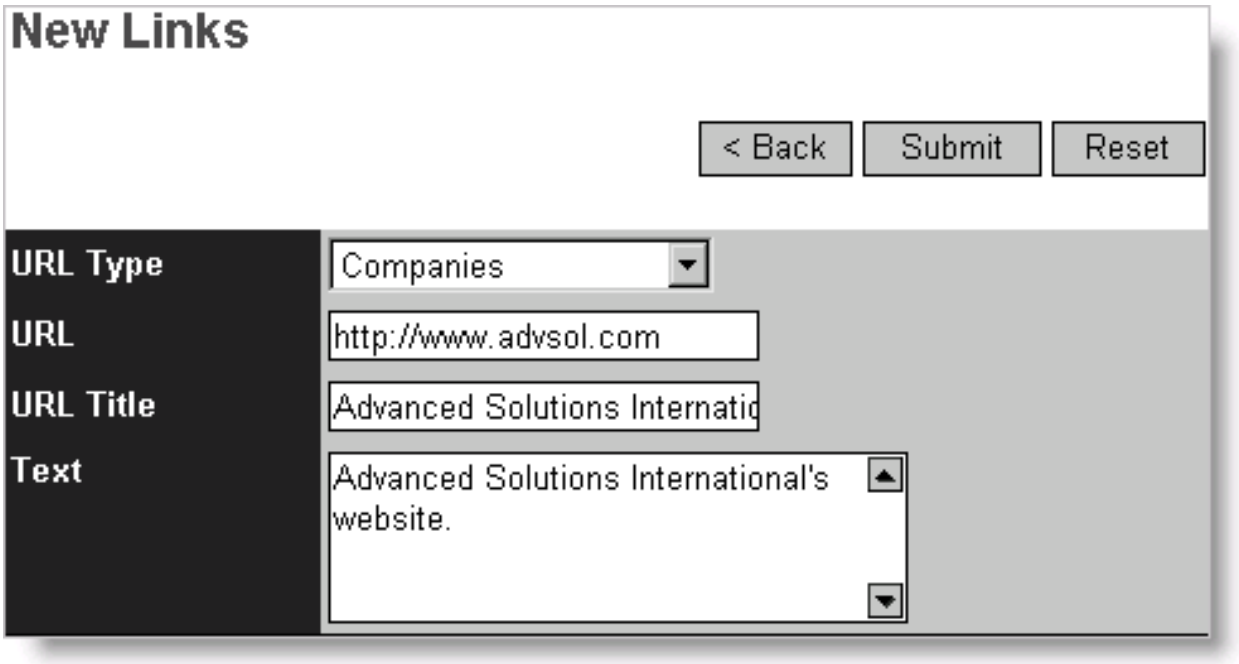
You can set up a list of URLs (links) to websites that may be of interest or relevance to your customers or staff. Categories or types of URL links are created in the Lookups feature. As links are added, they are assigned to one of the URL types.

To add a link to a URL type

1. Select Admin in the top navigation bar.
2. Select Admin> Links in the side index to display the Links Types page.
3. Click New Link to display the New Links page.
4. Select a URL Type from the drop-down list.
5. Enter the URL of the new link.
6. Enter the URL Title. This usually is the name of the organization whose URL is being referenced.
7. (optional) Enter a description of the new link in the Text field.
8. Click Submit to save the new URL.
9. Click OK to return to the Links Type page.



Link Types list



New Links page

To edit or delete a link

1. Select Admin in the top navigation bar.
2. Select Admin> Links in the side index to display the Links Types page.
3. Select a link Type to open the Links page.
4. Select the link that you want to edit or delete to open the Link Update page.
5. (optional) To edit the link:

- Make any necessary changes and click Update.
- Click OK.

To delete the link:

- Click Delete.
- Click OK.

To set the Link Target

The Link Target is a global setting that allows you to have linked websites open either in a new browser window or in the existing browser window. The benefit of having the linked websites open in a new browser window is that you are able to keep your site open in the browser while users are viewing the linked sites.

1. Select Admin in the top navigation bar.
2. Select Admin> Links in the side index to display the Links Types page.
3. Click Link Target to open the Links Target page.
4. Enable the Default or New Window option.
5. Click Submit.
6. Click OK.

Links Target page

To view the Link Inventory

The Link Inventory allows you to quickly view the number of links you have entered for each URL (link) type.

1. Select Admin in the top navigation bar.
2. Select Admin> Links in the side index to display the Links Types page.
3. Click Link Inventory to open the Links Totals page.

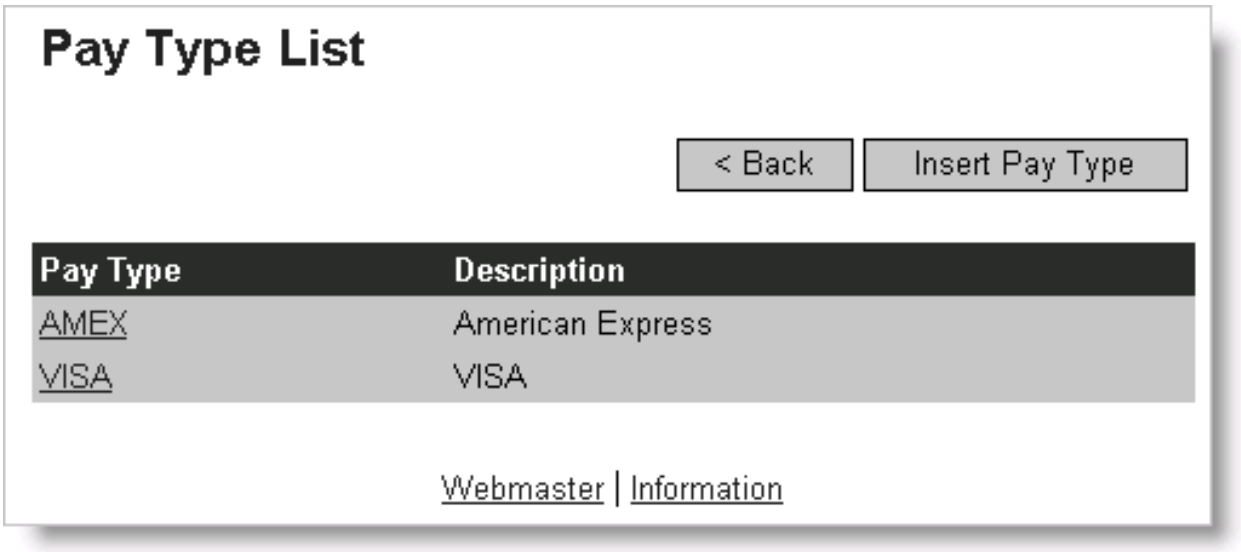
Links Totals page

Creating Pay Types

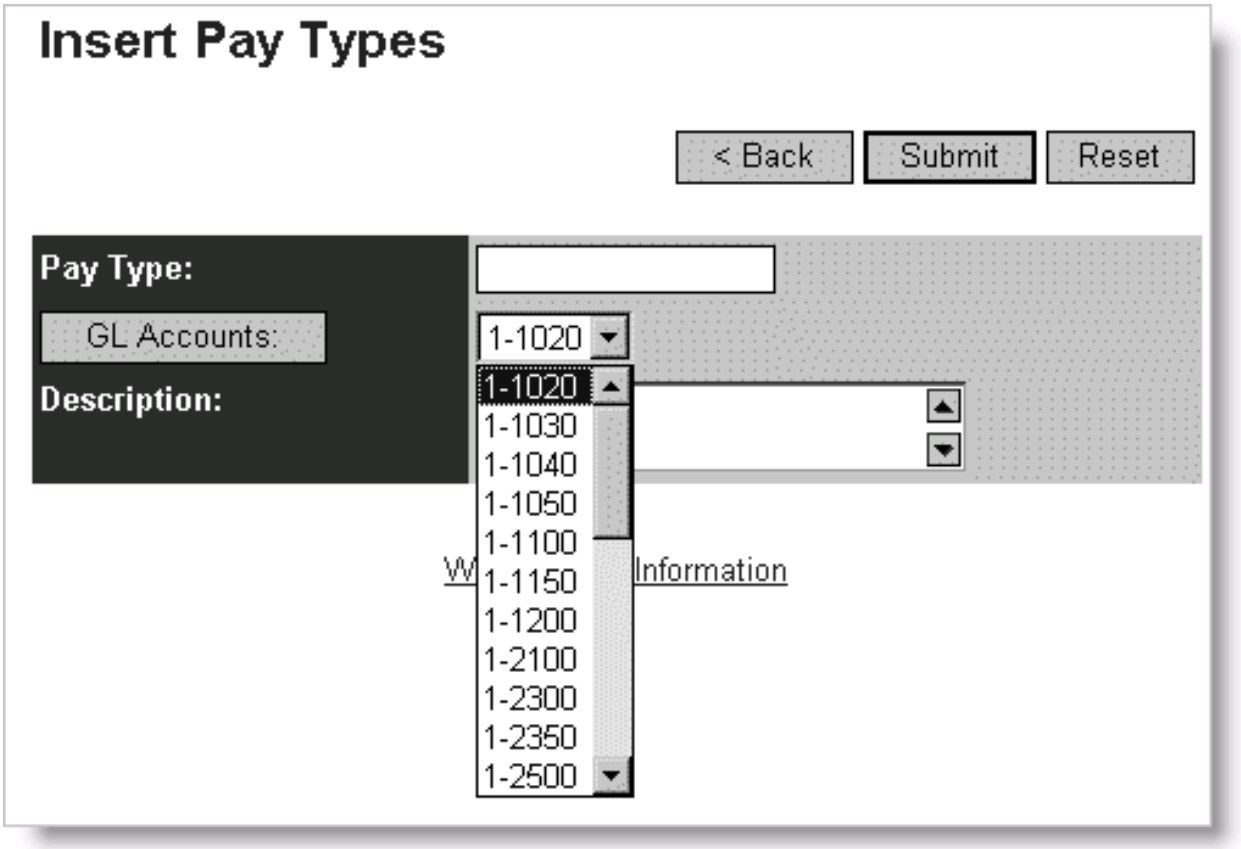
If you are using e-Series without iMIS, you can define the type of payment (credit card type) that you accept in e-Series. If you are using iMIS, pay types are set up in iMIS.

To create a Pay Type

1. Select Admin> Lookups in the side index to display the Lookup Lists page.
2. Select PAY_TYPES to display the Pay Type List page.
3. Click Insert Pay Type to display the Insert Pay Types page.
4. Enter a credit card code in the Pay Type field.
5. Enter the GL account for the pay type. If you are not sure which GL account to enter, click GL Accounts to display a list of GL accounts.
6. Enter a Description of the pay type.
7. Click Submit. A message displays confirming that the pay type information was inserted successfully.
8. Click OK to save the information.



Pay Type List page



Insert Type List page

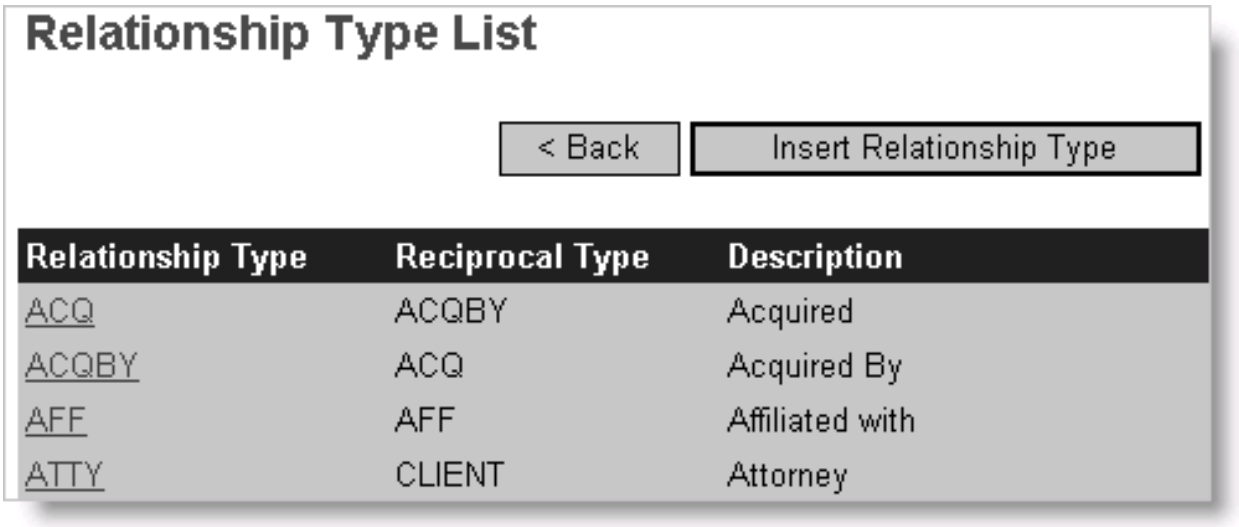
Creating Relationship Types

Relationship types allow you and your site's users to record their relationships with other individuals, customers, and organizations. For example, if you wanted to record the relationship between a parent and their child, you would need to create the child and parent relationship types.

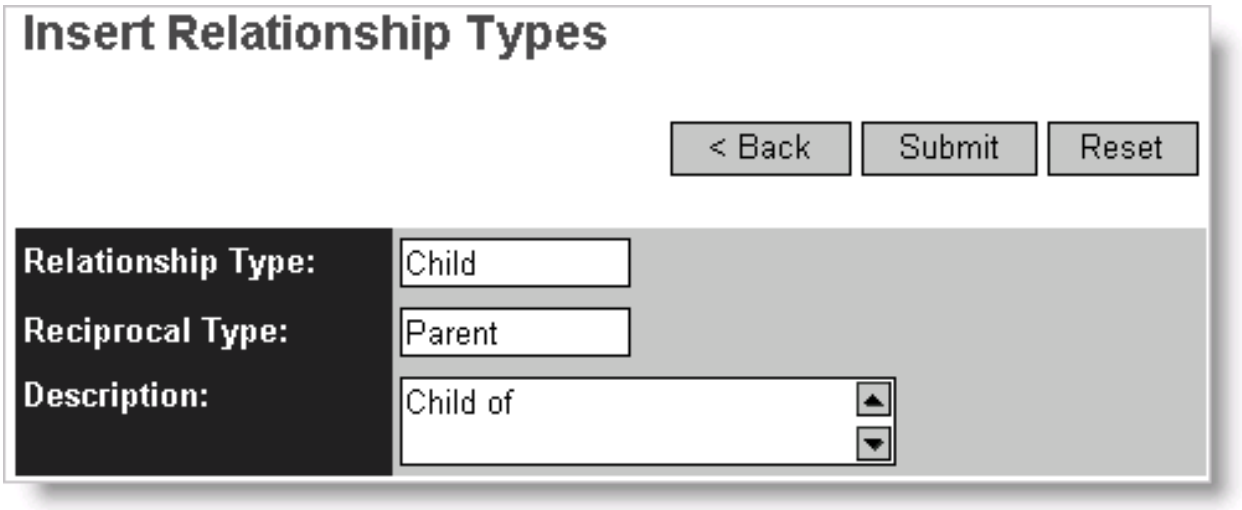
If you are using e-Series without iMIS, you can define the type of relationships that you use in e-Series. If you are using iMIS, relationships are set up in iMIS.

To create a relationship type

1. Select Admin in the top navigation bar.
2. Select Admin> Lookups in the side index to open the Lookup Lists page.
3. Select RELATIONSHIP TYPES to display the Relationship Type List page.
4. Click Insert Relationship Type to open the Insert Relationship Types page.
5. Enter a Relationship Type.
6. Enter a Reciprocal Type.
7. Enter a Description of the relationship.
8. Click Submit.



Relationship Type List page



Insert Relationship Types page

Troubleshooting Guide

General Troubleshooting Tips

Error message on login

If a customer receives the error message “Invalid Username or Password” when attempting to log in to the e-Series site and the login and password are correct, the problem could be that the customer does not have a record in the Name_Fin table. In most cases, this is the result of an error in the conversion process. When converting customer records into the Name table in iMIS, you must also convert corresponding Name_Fin records. When customer records are entered manually through iMIS, a Name_Fin record is created automatically.

To resolve this issue,

1. Run the following SQL update statement to insert Name_Fin records for every record in the Name table:

   insert into Name_Fin(ID)

   select ID from Name where not exists

   (select Name_Fin.ID from Name_Fin where Name_Fin.ID = Name.ID)

2. Re-create the views in iMIS:

- Select Utilities> Table Analysis to open the Server Table Status window.
- Click the Create Views button. A prompt displays.
- Click Yes.

Product Images do not Display in e-Orders

If product images are not displaying in e-Orders, verify the URLs for the Product Info Hyperlink, Product Image Hyperlink, and Product Thumbnail Hyperlink. You also may need to enable Read permissions in IIS for the Source\Images and Source\Orders directories.

Error message when editing a profile online

Sometimes Name.LAST_UPDATED is left unpopulated during a conversion. In this case, a customer/member encounters an error when trying to edit their profile online, “The update has failed, please try again!”

You must populate the records where Name.LAST_UPDATED is null.

Creating Static Pages

Static pages do not contain entry fields and do not require user input. These pages can be modified as needed by the webmaster.

A site that does not use iMIS contains five folders that contain and display static pages. When logged in as an Administrator, these are the five areas listed in the side index:

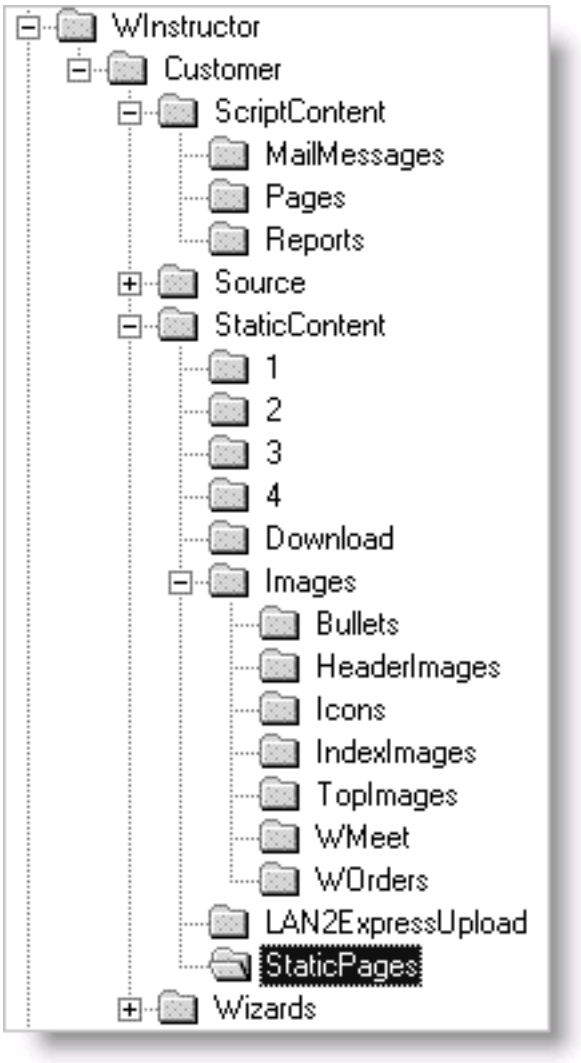
- Unsecured
- Anonymous
- Administrator
- Member
- Staff

Access to these five areas is turned on with the Security Detail tool.

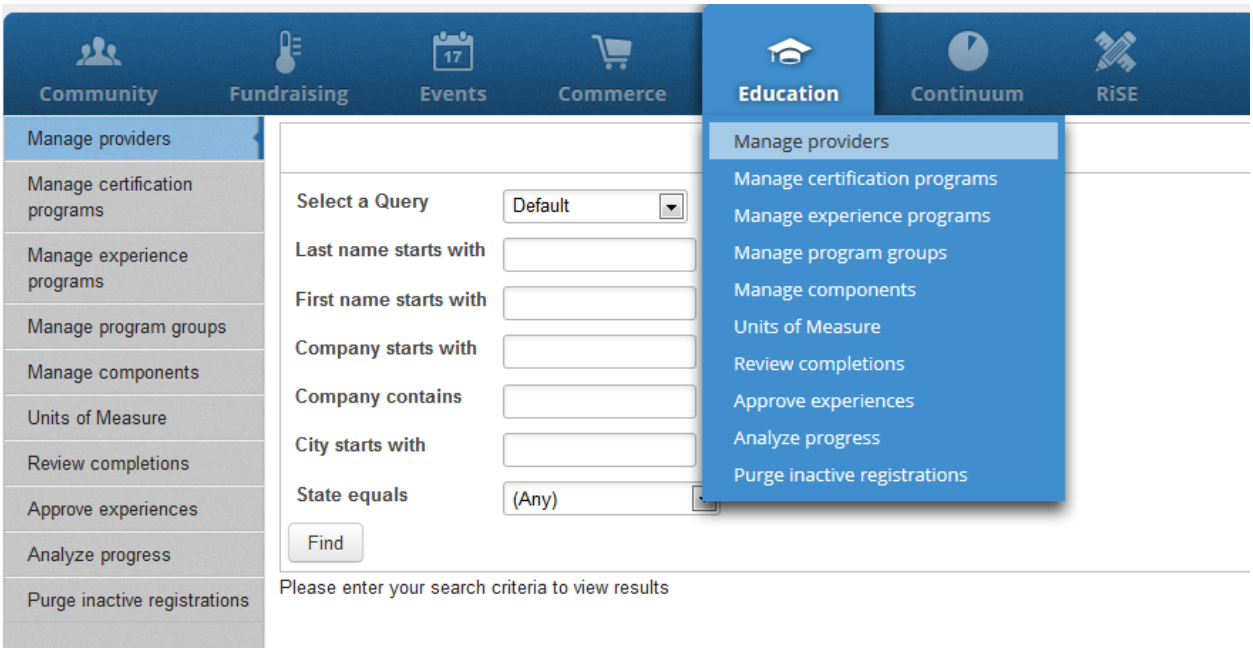
To create and place static pages in your site's Static folder

1. Load your site using the FrontPage Explorer loader.
2. Expand the StaticContent folder.
3. Open the index.htm file in the folder titled #1.
4. Add four static page documents, posting one to each of the four Static Page folders for your site.
5. Place them in the Anonymous, Admin, Member, and Staff areas of your site.
6. Link these static page documents to the Jump List.

   The StaticContent Folders 1-4 relate directly to the Anonymous, Admin, Member, and Staff areas of your site. The folder can be edited to allow for the use of terms other than Welcome, Admin, Member, and Staff. PowerPoint presentations and other types of documents can be loaded with FrontPage to the Anonymous, Admin, Member, and Staff areas as shown in the following example.


WInstructor
Customer
ScriptContent
MailMessages
Pages
Reports
Source
StaticContent
1
2
3
4
Download
Images
Bullets
HeaderImages
Icons
IndexImages
TopImages
WMeet
WOrders
LAN2ExpressUpload
StaticPages
Wizards

Education



Education management

Education management is how you define and coordinate education programs for your organization. It spans these activities:

- Defining training providers and locations
- Defining the overall program
- Defining the elements of the program
- Defining the program stages and the requirements for each stage
- Defining the fee structure
- Defining the schedule for courses and selecting trainers
- Reporting on education programs
- Canceling a course or an entire certification program

- Defining scheduled tasks for reviewing completions
- Troubleshooting issues reported by program participants

What must be done before you can start?

Before you define the education program, make sure:

- The iMIS administrator has configured both the iMIS database and the iMIS application to support the Education feature.
- The iMIS website administrator is aware that the program and its offerings will be displayed on your iMIS-enabled website, if applicable.
- You have designed a paper prototype of the program's stages and requirements. This upfront planning helps with the program design within iMIS.

Putting it all together

After you have defined the education program, make sure:

- Any offerings that carry fees are set up as products in the iMIS system.
- Any classes or events you provide are set up as events in the iMIS system.

Access control: Education

Your user class, your role assignments, and your specific Education authorization level affects the degree to which you can view or edit Education experience programs or certification programs and do other tasks related to Education.

If you are assigned the SysAdmin role you have full control rights for every Task List Item in this table.

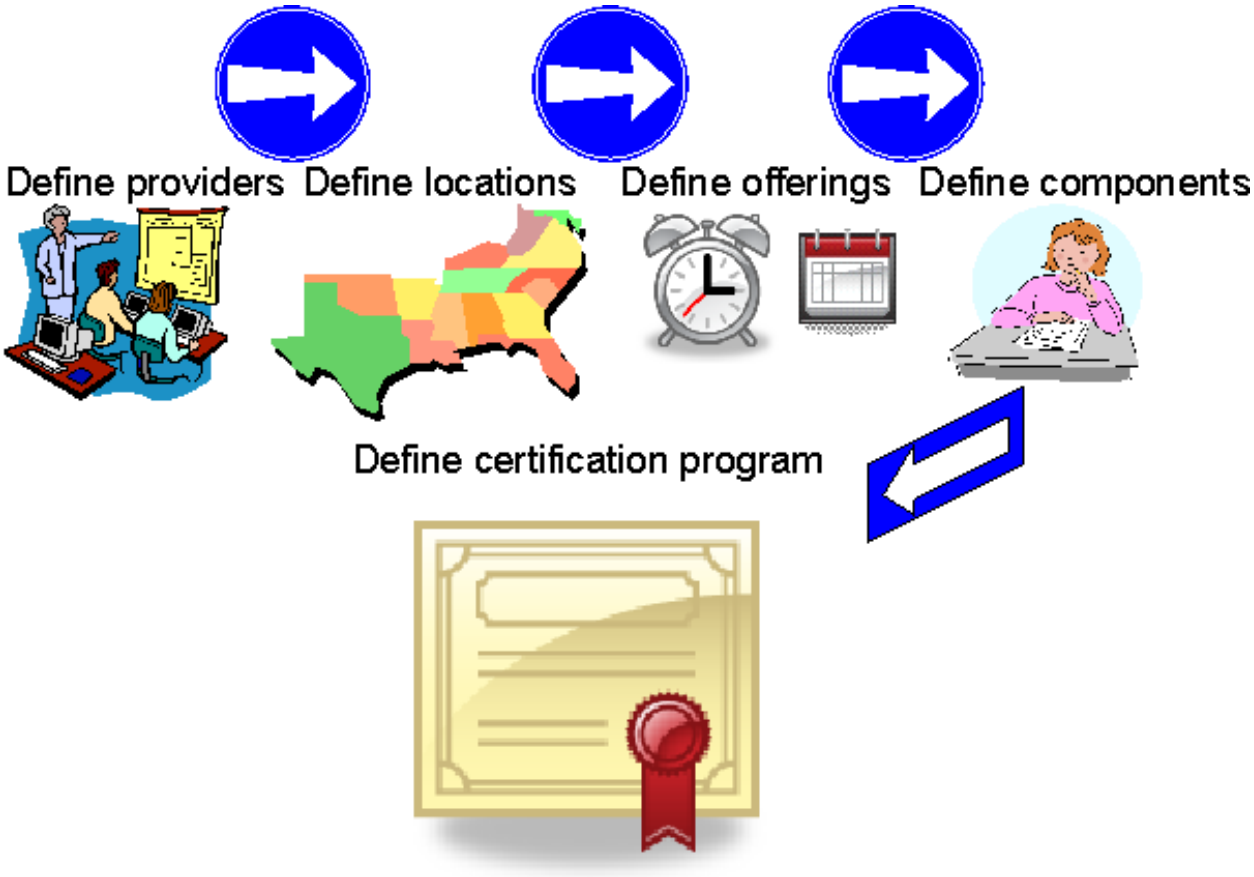
Task List Item	Required Conditions
Education > Analyze Progress	Full user + any Certification group + CERTETP license
Education > Manage Program Groups	Full user + CertificationAdmin group + CERTETP license
Education > Manage Certification Pro-	Full user + CertificationAdmin group OR Cer-

grams	tificationManager group + CERTETP license
Education > Manage Experience Programs	Full user + CertificationAdmin group OR CertificationManager group + CERTETP license
Education > Manage Components	Full user + CertificationAdmin group OR CertificationManager group + CERTETP license
Education > Manage Providers	Full user + CertificationAdmin group OR CertificationManager group + CERTETP license
Education > Approve Experiences	Full user + any Certification group + CERTETP license
Education > Review Completions	Full user + any Certification group + CERTETP license
Education > Purge Inactive Registrations	Full user + CertificationAdmin group + CERTETP license
Education > Generate reports	Full user + any Certification group + CERTETP license
Contacts > Contact Management > Personal > Certification History	Full user + any Certification group + CERTETP license
Contacts > Contact Management > Personal > Define Locations	Full user + CertificationAdmin group OR CertificationManager group + CERTETP license
Public View > My Account > Experiences	Any user + CERTETP license
Public View > My Account > Certification	Any user + CERTETP license

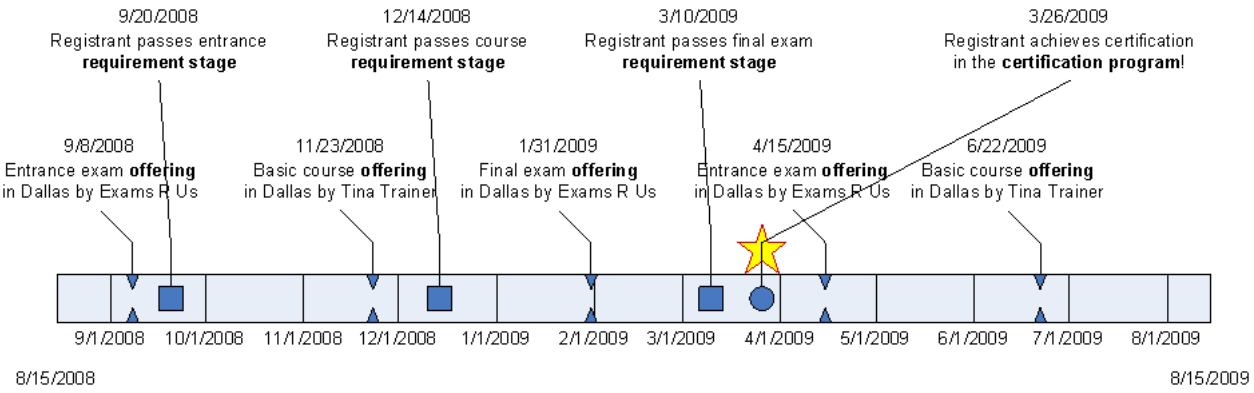
Certification and experience program definition

Certification programs

A certification program is a defined set of experiences or training programs offered by your organization to members to prove that they have achieved a measured level of knowledge within a designated timeline.



This figure shows the order that you use to create the objects that you select later for defining new objects. For example, you cannot define components until you define offerings.

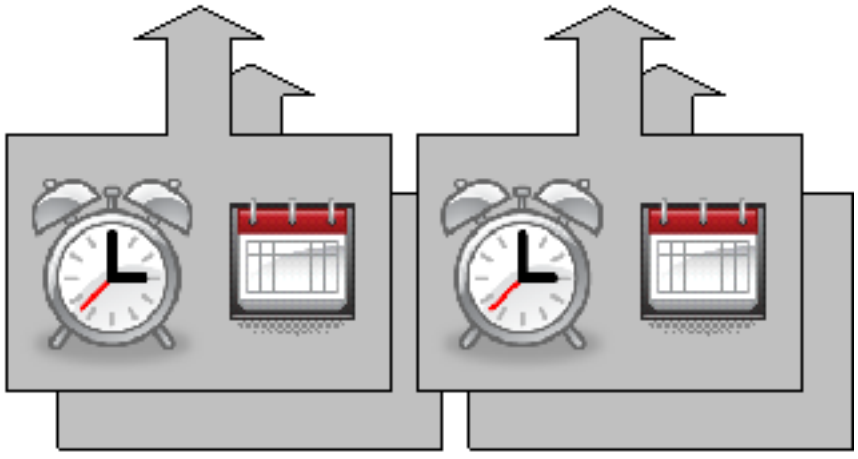


This figure shows an example certification program with three requirements - an entrance exam, a basic course, and a final exam. Staff approval may be required depending on the way the certification program is defined.

Experience programs

An experience program is a defined set of experiences that you group together to provide a known set of knowledge or expertise in a particular area or field for your members. Providers and locations are optional, and members may enter their own experiences using the Public view.

1. Define experience program
2. Define experiences



3. Define offerings

How experience programs relate to experiences and offerings. An experience program does not have components like a certification program. Instead, the program contains experiences which may have specific offering dates or locations, such as a volunteer cleanup shift.

Defining training providers and locations

Your iMIS database can store the contact information for your training providers so that the information is stored in the same location accessible by everyone in your organization. The Education feature helps you manage the providers of the certification training required by your program.

Before you begin

You must define an iMIS contact record for each trainer in order to manage their information as a training provider.

To define providers

1. Select Manage >Education > Manage Providers.
2. Select a provider by:

- Searching for the provider by using the filter, if needed. Select the provider's contact record in the Results list.
- If a contact record does not yet exist for the provider, go to Contacts > Contact management. Click Create Account and add contact information for the new provider.

3.

Defining the overall program

Defining experience and certification programs

Define experience programs to enable members to enter activities they have participated in, such as volunteer work hours that are not directly credited to a course or class.

Define certification programs to indicate that a member has achieved a measurable level of expertise for which your organization offers certification.

Before you begin

You must be a Certification User, Certification Admin, or Certification Manager to set up programs and to select to display or hide programs from users based on their role assignments.

To define experience programs

1. Select Manage > Education > Manage Experience Programs.
2. Click Create new Experience Program.
3. On the Definition tab, specify the experience program properties.
4. Click Save.

To define certification programs

1. Select Manage > Education > Manage Certification Programs.
2. Click Create new Certification Program.
3. On the Definition tab, specify the program information.
4. Click Save.

Note: If a contact registers for a program, the requirements of the program at that point in time are copied to their registration record. Updates to the requirements are not carried forward.

Defining the elements of the program

Program elements

An education or experience program can consist of any combination of two elements:

1. Components that indicate what classes or experiences a student should complete.
2. Offerings that indicate a specific date, time, and location that a member can complete a component or experience. A component may have multiple offerings, such as different dates when a course is offered.

Defining components

Components may require a fee, they may need staff approval to go through a component, or other options.

Before you begin

You must have already defined a certification or experience program in order to define components.

If you want to charge for participation, the product for the fee or charge must already be defined. You must associate the certification experience with the product when you define the experience.

If you want an event (such as a training class) to be associated with the program, the event or function must already be defined.

To define components

1. Select Manage > Education > Manage Components.
2. Click Create New Component.
3. On the Definition tab, specify the component properties.
4. Click Save.
5. Repeat definitions as needed for the components required for multiple stages and requirements of the certification program.
6. Click Save when you have created all the components you need for your certification program.

To define experiences

1. Select Manage > Education > Manage Experience Programs.
2. Select an experience program.
3. Click the Experiences tab.
4. Click Create new Experience.
5. On the Definition tab, specify the experience properties.
6. Click Save.

To define offerings

1. Select the desired component/experience.
2. Click the Offerings tab.
3. Click Create new Offering to associate a training class or a completion date for volunteer hours.
4. Enter the information for the offering, including;
5. Link Experiences – (optional) Select from an approved list of experience types that can be associated with this offering.
6. Click Save.

Tips

The Offerings tab appears after you define and save an experience or component.

iMIS populates the Provider list based on the definitions in the Education > Manage Providers area.

When defining a certification program or experience program, you cannot select a program group that is marked Status = Inactive.

Define the program stages and the requirements for each stage

Defining requirements for a program

For each education or experience program your organization offers, you can set up requirements sets which can contain components, tasks, notes, and email notifications that occur each time a stage is passed.

You can also define program stages to indicate a required order or specific requirements for passing through a stage, such as a grade, staff approval, payment of a fee, or attendance at an event. Stages are satisfied when all components within a stage are completed.

Requirements consist of sets that can be in a particular order, and you can use either AND combinations of sets, meaning both are required to pass the stage, or you can use OR combinations of sets, meaning either one or the other allows the member to pass through a stage.

Before you begin

You must be have the Certification Admin or Certification Manager role assigned.

You must fill out the Definition tab for a certification program and click Save in order to view the Requirement tab.

You must define components so that you can select them as a requirement set within the stage.

To define requirements

1. Select Manage > Education > Manage Certification Programs.
2. Select a certification program.
3. Click the Requirement tab.
4. Click Add Stage.

5. Define the stage by entering the desired information and adding tasks or email notifications as needed.
6. Click the Requirements tab and then click the Add a Requirement link next to Set 1 to add a required component for the stage. If you need multiple components to be completed before passing through a stage, click Add a new Requirement Set.
7. If more than one set is needed, select AND or OR from the drop-down list between the sets.

   You can combine sets with an AND combination, meaning both components must be completed before passing through the stage, or combine sets with an OR combination, meaning either component must be completed before passing the stage.
8. On a saved certification program, click the Requirement tab.
9. Click Add Stage and define the stage. You can combine requirements with AND or OR by adding requirement sets. For example, you can either require an exam component for entrance into a program or a staff approval component stating their experience qualifies them for entrance into a certification program.
10. After all the stages are defined, click Define Completion Stage and specify the completion stage.
11. Click Save.

Tips

The following information can be helpful when defining stages and requirements for a certification program.

- The first stage of a certification program is the completion stage. If you do not want to specify a completion process, create an empty first stage.
- All certification completions require approval.

- A stage could be an email message saying congratulations, or the printing of the actual certificate. That stage would be started once the completion has been approved.
- If you find that you need to combine both AND and OR within one set, see if you can add an additional Requirement Set rather than making a confusing combination that could be interpreted differently depending on what groupings are used.

  Defining a sequential program

  For a sequential program, you would create a program group so that one certification program can be a pre-requisite for another certification program because they both belong to the same program group.

  Defining a maintenance program

  For a program that has a renewal requirement, such as a perpetual certification status that members want to maintain over many years, ensure that the stages and requirements are repeatable, and choose Multiple Iteration on the Summary tab for the certification program.

  Defining experience programs as a pre-requisite to enter a certification program

  To use an experience program as an entry qualifier to a certification program, create a component that requires staff approval and use that component for the entry requirement stage. A staff member would be responsible for checking the member's record to know whether or not the entrance requirement of completing an experience program had been completed.

Defining a program group

You should define a program group when you want to associate multiple certification or experience programs together, allowing you to have one program be a pre-requisite for another program. For example, you may have an initial certification program that is followed by a maintenance certification program, so you would group those two programs together for tracking purposes to get an idea of the status of each as related to the other.

Before you begin

Determine which programs are grouped together for tracking purposes before defining a program group.

To define program groups

1. Select Manage > Education > Manage Program Groups.
2. Click Create new Program Group.
3. Specify the Program Group properties.
4. Click Save.

Tips

- You use these program groups when defining certification programs or experience programs by selecting a group from the drop down list.
- When defining a certification program or experience program, you cannot select a program group that is marked Inactive.

Defining the fee structure

Charging fees or selling materials for education products

You can charge and collect a fee for certain aspects of your certification program, such as an application fee or a fee for taking a certain class. A fee is an associated product attached to a component. You define the associations in the Component information window.

To define certification products

1. From Orders in iMIS Desktop, select Manage inventory > Manage products to open the Manage products window.
2. Click New.
3. Define the product, such as a program application fee or a book for a course.
4. Click Save.

Tips

- You may want to set up a certification or education category for these products using Orders > Setup tables > Product categories.
- Inform your members that when they purchase the product in the Public view they must register for the experience or training class separately. Purchasing the product indicating they have paid the application fee does not automatically indicate they are registered or that their application is accepted.
- When selecting a product in the Select Items window, you can use the search query and click Filter to see fewer products.

Defining the schedule for courses and selecting trainers

Defining events for education

When you offer a training course for certification, you relate it to an iMIS Event manually. You define the relationship in the Component Information window.

Before you begin

You should identify the training provider to ensure they are available for the event.

To define events

1. From Events in iMIS Desktop, select Define an event to open the Define an event window.
2. Click New to open another instance of the Define an event window.
3. Define the event with the appropriate dates and registration information for the component offering.
4. Save the event.

To create an offering for the event

1. Select Manage > Education > Manage Components.

2. Select an existing certification component.
3. Select the Offerings tab.
4. Click Create new Offering.

   The New Offering window appears.
5. Define the offering to match the corollary Event, and then click Save.
6. Click Save to save the certification program with the offering additions.

   Tips

   Inform your members that when they register for the training class they are not automatically associated with the certification experience and must register for the experience separately.

Defining certification communication

You create email messages that are sent at the start of a stage within a certification component for different reasons and audiences related to certification. For example, you may send notifications to a staff member so that they can review progress through stages. Or, you may need to send an email to all participants in a certification program before a particular offering is available so that they can sign up for the event. You define email merges for certification communication within the Document System in iMIS.

Before you begin

Certification programs must already be defined.

To define certification communication

1. Create an email merge output process such as those used for Marketing or Process Mgr. Refer to Creating an email merge output process in the iMIS Reference for Marketing features for additional detailed instructions.
2. Store the email merge in $ > Common > Shared Documents > Processes folder (or one of its sub-folders) of the Document System.

3. When defining a requirement, define the email notification within a stage and select the email merge output process that you want to be sent when the stage is started.

   When that stage starts, iMIS sends the communication.

   Tips

   The following information can be helpful when defining certification communication.

- If your merge produces any email address duplicates, they result from the query specified in the merge.
- The recipients of the communication are created in a query built in the Document System interface, based on the roles for the stage containing the email notification.

Defining custom data for certification programs

Using iMIS data about the certification or experience program, you can display additional data about the program, its registrants, or its trainers when viewing the Summary tab of the certification program.

Before you begin

In order to modify business objects, you must have system-level administrator privileges. Having administrator privileges for the Education module is not sufficient to change business objects.

To create custom data and modify a property display

1. Modify the database schema to include the custom data you want to display.
2. From the Tools console, select Business Object Designer.
3. Select the business object (BO) you want to modify and click Edit. These are the available BOs that can display custom data:

- CertificationModule (modifications display on the Manage Components page)
- CertificationProgram (modifications display on the Manage Certification Programs page)
- ExperienceProgram (modifications display on the Manage Experience Programs page)

- ExperienceDefinition (modifications display on the Manage Experience Programs page when editing an Experience)
- Offering (modifications display on the Offerings page)

4. On the Database tab, add the column and table as properties, joining the data as needed.
5. Click Save to save the Business Object.
6. Click Compile, then Close.
7. Click Publish, then Close.
8. Close the Business Object edit window.

To view the custom data

1. Select Manage > Education and select the menu item correlated to the Business Object that was modified.

   The custom data appears at the bottom of the page.
2. Click the Show or Hide link to display the information.

Putting it together: Defining a complete certification program

This scenario walks through the creation of the International Communication Certification Program with the designation ICCP.

Before you begin

Assign the certification administrator's logon to the Certification Admin Group in System Setup > Security Administration > Users. Logon as that user for all these tasks.

Define companies as providers

1. On Contacts, search for a company that provides training, and select that contact record.
2. Under Contact Management, click Define Locations.
3. Click Add a Location.

4. Define the Location Name. You may enter any text here, such as a city or state like Austin, TX.
5. Click Save.
6. Repeat for another company, making them a training provider as well.

Define exam and course components for the program

1. Select Manage> Education > Manage Components.
2. Click Create new Component.
3. Define the following components:

- Entrance Exam - Describes a graded entrance exam to prove worthiness as a communicator. Enter a Name, Code (such as ENTER), and Description. Select Requires Grade, Requires Approval, and select Fail and Pass under Available Grades and move them to Selected Grades. Click Save.
- Entrance Approval - Describes a "free pass" from a staff member to allow someone to enter the program without taking or passing the Entrance Exam. Enter a Name, Code (such as SKIPENTER), and Description. Select Requires Approval and Certification Staff Only. Click Save.
- Basic Communication - Describes an entry-level class. Enter a Name, Code (such as BASIC), and Description. Enter 3 for the Number of Units and select Requires Approval. Click Save.
- The Mind of the Communicator - Describes another class. Enter a Name, Code (such as MIND), and Description. Enter 3 for the Number of Units and select Requires Approval. Click Save.
- Culture Considerations - Describes another class. Enter a Name, Code (such as CULTURE), and Description. Enter 3 for the Number of Units and select Requires Approval. Click Save.
- What's Your Regional Knowledge? - Describes another class. Enter a Name, Code (such as REGION), and Description. Enter 3 for the Number of Units and select Requires

Approval. Click Save.

- Certification Exam - Describes a graded exit exam to demonstrate what a certification seeker has learned. Enter a Name, Code (such as FINALEXAM), and Description. Enter 3 for the Number of Units, select Requires Grade, Requires Approval, and select A, B, or C under Available Grades and move them to Selected Grades. Click Save.

4. Now that all the components are defined, define offerings for each component as described in the next section.

   To define at least one offering for each component

1. For example, open the Entrance Exam component created above by going to Manage Components and selecting it from the list.
2. Click the Offerings tab.
3. Click Create new Offering.
4. Enter a Name, Code, and Description. You may want to use the intended location or date as part of the name.
5. Click the select link next to Provider, and click Filter to search for and choose a provider for the offering.
6. Click the row to select the provider's company record, and click OK.
7. Choose a Location from the drop-down list.
8. Select a Date for the exam to be offered in the future.
9. Click Save.
10. Repeat these steps for each component to define offerings for each component.

    To define a congratulatory email to the registrant

1. Go to Tools > Document System and add an email merge to $\Common\Shared Documents\Process folder.

2. Select Bound as the Associated Query.
3. Select the All Contacts query in the $\Common\Shared Documents\Contact folder as the source Query.
4. Write the body of the email, using [NetContact.FullName] in the body if you want to personalize for each recipient.
5. Save the email merge and select it when you define the certification program's completion stage.

   To define the certification program

1. Select Manage> Education > Manage Certification Programs.
2. Click Create new Certification Program.
3. On the Definition tab, enter the following:

- Name International Communication Certification Program
- Status Active
- Deadline Period 1 Year
- Grace Period 3 Months
- Certification Program Description Show the world that you are a professional global communicator.
- Units of Measure Credits
- Minimum Value 0
- Maximum Value 3
- Select Requires Approval
- Clear Maintenance Program
- Clear Auto Enroll
- Designation ICCP

- Select Add Designation
- Certification Program Group (None)
- Prerequisite Program (None)
- Required Number of Units 0
- Certification Number Format ICCP-###

4. Click Save.
5. On the Requirement tab, click Stages must be completed in order.
6. Click Define Completion Stage.
7. Enter a Completion Stage Name such as "Completion of ICCP program". Keep the Required field cleared for the Completion stage.
8. In the Email Notifications tab, click Add Email.
9. Next to Process Name, click the browse button and select the email merge to add the congratulatory email message you created earlier in the Document System. Choose Registrant as the Assignee. Click Continue.
10. Click the Tasks tab and click Add Task.
11. Assign the Certification Admin a task called "Check for completions." Click Continue.
12. Click Add Stage in the Stages area to add the first stage.
13. Enter a name for the first stage in the Name field, such as "Entrance to the program".
14. From the Update Registration Status list, choose Pending Completion.
15. Click the Requirements tab
16. Click Add a new Requirement Set.
17. Search for and click to select the Entrance Exam component first, then click OK.
18. Click Add a Requirement under Requirement Set 2.
19. Search for and click to select the Entrance Approval component, then click OK.

20. From the AND or OR drop down list, choose OR. This selection indicates that a registrant can either take the exam or have staff approval for entering the program.
21. Click Add Stage to add additional stages. Repeat for the following stages, combining with AND or OR as appropriate:
    - Add a Basic Course stage with only the Basic Communication course as a requirement. Select Active for the Update Registration Status field for this stage.
    - Add a Main Courses Stage with three of the courses as options for taking - The Mind of the Communicator, OR Culture Considerations, OR What's Your Regional Knowledge?
    - Select (None) for the Update Registration Status field for this stage.
    - Add a Certification Exam stage with the only requirement being the Certification Exam.
    - Select Pending Approval for the Update Registration Status field for this Certification Exam stage.
22. Click Save.

    Now you can register members for the International Communication Certification Program.

Program maintenance

A program is a group of certification or experience components that contain specific offerings for the program and optionally products that can be purchased as related to the program.

Repeated maintenance on certification and experience programs

Maintenance on those programs involves the possible cancellation of an offering or an entire program. Also, you can define tasks for reviewing completions of requirements within a certification program that require staff approval.

Since components are re-usable for multiple certification programs, you may want to design your components for re-use and cloning. Cancelling a certification program does not affect the components that comprise the program.

What security privileges or role assignments are required for certification program definition?

Some organizations might choose to have a single iMIS administrator define all certification programs with the direction of other staff members. Other organizations might choose to enable the various business managers to define programs for their specific areas. With either model, the iMIS logon ID needs to have certain privileges for creating certification programs.

What role assignments are needed to view programs?

You can display or hide certification programs from users based on their user role assignments, if wanted.

- Certification User
- Certification Admin
- Certification Manager

Canceling certification or experience programs

When you no longer want to offer members certification for a certain skill set or experience set, you may need to cancel a program.

Closing a program to stop new registration is different from canceling a certification program. Also, canceling an event registration or canceling a product order does not cancel the entire program.

This procedure describes canceling a program.

Before you begin

Certification or experience programs must already be defined.

To cancel certification or experience programs

1. Select Manage> Education > Manage Experience Programs or Manage Certification Programs.

2. Select the experience or certification program that you want to cancel.
3. Click the Definition tab.
4. Select Inactive from the Status drop-down list.

Tips

The following information can be helpful when canceling certification programs.

- You might want to ensure that any related program group is marked Inactive.
- You might want to ensure that all registrations have been purged from the program using the Education > Purge Inactive Registrations area.
- In the registrant's Certification History area, their registrations continue to display with inactive programs indicated.
- After a program is marked Inactive, members are not allowed to register for future programs or components.
- Inactivating an experience, component, or offering should keep people from registering going forward, but existing registrations remain intact and valid. For example, if a class is offered and then cancelled, each registration must be cancelled.

Reporting on education progress

To monitor progress and manage the counts for education programs, iMIS offers management reports for education programs. Generate and print these reports to track progress on the education programs your organization offers.

Before you begin

You must have sufficient privileges to use iMIS to generate and print Education-based reports.

To generate reports

1. From Tools, select Reports.

2. Go to the CertificationManagement/Reports folder.
3. Open one of the reports.
4. Go to Run and enter the parameters for limiting the data used for the report.
5. Click Run.

Available reports

- Report Title: Experience Count Summary Report
- Report Title: Experience Roster
- Report Title: Participant Roster
- Report Title: Completed Certificates Report
- Report Title: Offering Roster
- Report Title: Program List
- Report Title: Component List
- Report Title: Upcoming Delinquency Report
- Report Title: Transcript Report

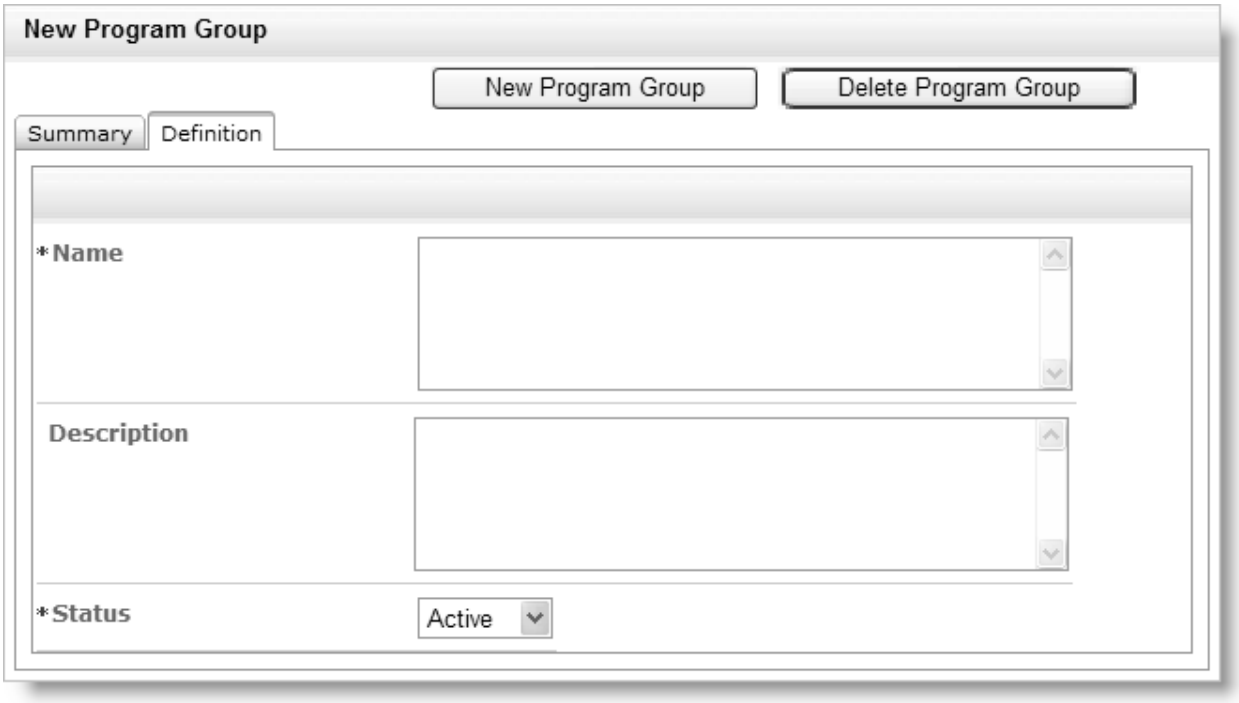
Certification administration windows

The windows described in this section are used when performing certification program management tasks.

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

Manage Program Groups window

This window defines program groups used to correlate two or more certification or experience programs together. This grouping allows you to track the status and enrollments for an initial program followed by a maintenance program, for example.



Select Manage> Education > Manage Program Group, and then add or select a program group

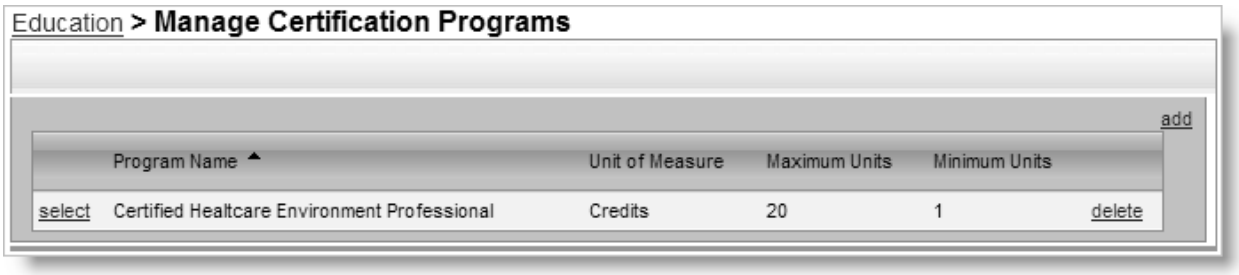
Definition tab

This area specifies a name and description for the program group and indicates the group status.

- Status - Indicates if the group is currently Active, Inactive, or Remove. Only groups marked Active are available for selection when creating a certification program. You cannot associate a program to an Inactive group. Program groups with a status of Remove do not appear in the list of program groups. Use a status of Remove only for groups that have no programs associated to it.

Manage Certification Programs window

This window lists previously defined certification programs.



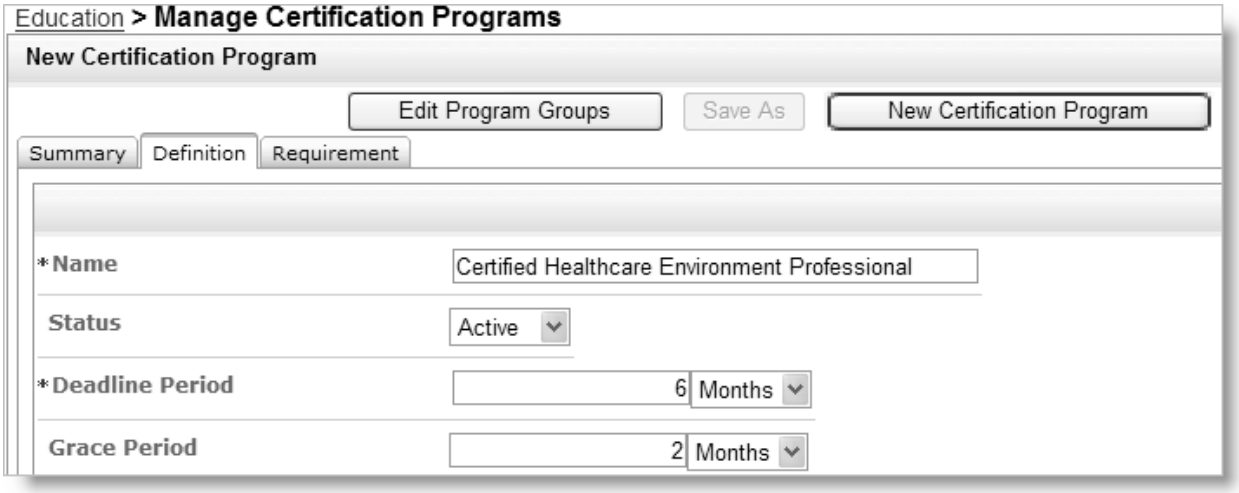
Manage> Education > Manage Certification Programs

Certification Program - Summary and Definition tabs

This window defines a certification program. Certification programs track progress towards earning certification through stages. At the completion of a program through all the stages, you award the member certification in that particular program.

Tips

- From this window, you can edit program groups if a grouping does not already exist.



Manage> Education > Manage Certification Programs, and then add or select a program

Summary

This area summarizes the definitions from the Definition and Requirement tabs. Fill out the fields in the Definition and Requirement tabs before viewing this tab. Some selections may be changed on the Summary tab.

Definition

This area specifies many aspects of the certification program from its status to whether it requires staff approval, to the designation and any prerequisite programs.

- Name - Specifies a descriptive name for the certification program that appears on the Public view.
- Status - Indicates whether the program is Active, Inactive, or Remove. Members cannot sign up for Inactive programs. Programs with a Status of Remove are not listed in the list of programs on the Manage Certification Programs window.
- Deadline Period - Sets an initial deadline period for program requirements. The period should be the amount of time within which the registrant must complete the program starting with the date the registrant is first registered for the program. For example, if participants must complete the program requirements within three years, but they do not fulfill the requirements during that time, they may be able to get a deadline extension for an additional fee, but they have not completed the program within the deadline period.
- Grace Period - Adds a grace period allowance, the amount of time that may be extended for the registrant to complete the program, for students who do not meet the maintenance requirements of a program.
- Units of Measure - Indicates the component's units, selecting from Credits, Hours, or CEUs, which stands for Continuing Education Units.
- Minimum Value - Indicates a whole-number value for the minimum units that a component in this program can contain.
- Maximum Value - Indicates a whole-number value for the maximum units that a component in this program can contain.

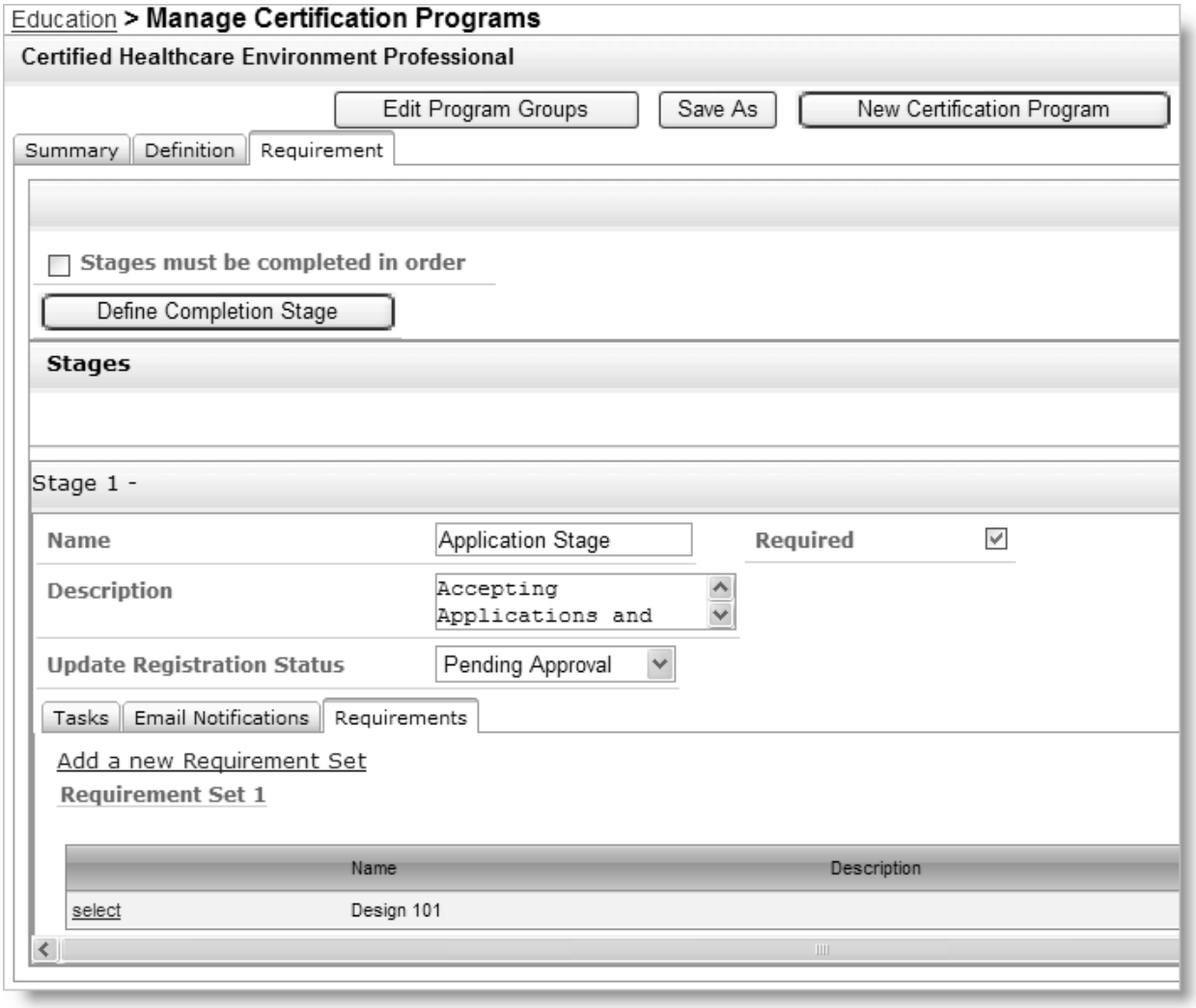
- Requires Approval - Indicates that a staff member must approve the certification before the program is complete. These programs can then mark the registrant as awaiting approval of program completion.
- Maintenance Program - Indicates that the certification program that has an initial requirement and a maintenance requirement or simply a rotating set of requirements over a specific period to maintain certified status.
- Auto Enroll - Indicates that when selected, iMIS automatically enrolls the registrant in the certificate program if the registrant completes one of a program's required components, such as taking a training course.
- Designation - Describes an acronym, such as CPA, that follows the contact record's name to indicate they have completed the requirements of a certification program and have earned this designation.
- Add Designation - Ensures that the designation is added to the contact record upon successful completion of this certification program.
- Certification Program Group - Defines which program group this program belongs to, enabling multiple programs to be part of a series of required programs.
- Prerequisite Program - Indicates which program comes before the program you are defining.
- Required Number of Units - Indicates the number of units required to complete the program. iMIS validates that the number is less than or equal to the total number of units of the components within the program.
- Certification Number Format - Indicates the numbering digits for earned certifications using hash mark symbol (#), letters, hyphens, and optional numbers to track the certifications that have been awarded within a program in a sequential numeric order. For example, enter CSP-###00 so that the certificate awarded for the first completion is indicated with CSP-00100.

Certification Program window - Requirement tab

This window defines the execution of the stages for the program requirements, including the order and components that must be completed in order to meet a requirement.

Tips

- Stages can be hidden with Hide/Show links.
- You can re-order stages using the triangle icon up and down buttons.



Manage> Education > Manage Certification Programs > Requirement tab

Requirement

This area specifies the stages for completion of the certification program.

- Stages must be completed in order - Indicates that your certification candidates follow each stage in order to obtain credit or certification status.
- Define Completion Stage - Defines a single stage that all members must clear in order to complete the program.
- Required - When checked, indicates that the stage must be completed in order for a member to move to the next stage and earn the certification through this program.
- Update Registration Status - Indicates the status that you want to use to update the program registration record when a registrant has reached this stage. Your choices include Active, Approved, Inactive, Pending Approval, Pending Completion, and Rejected.
- Task - Add a new Task opens a new window to define the task for the stage.

  The Task window defines the task that must be completed before passing a stage in a certification program's requirement list. When a registrant reaches the stage where the task is assigned, the task appears on the assigned users' list of tasks in iMIS.
- Days Allowed - Indicates the number of days to complete the task before iMIS marks the stage incomplete.
- Priority - Assigns a priority to the task, choosing from Low, Normal, or High.
- Assignee - Indicates who is assigned to the task, based on the role the person holds, such as Everyone, Certification User, Certification Manager, or Certification Admin.
- Email Notifications - Defines email notifications to be sent when a registrant has reached the current stage. Click Add Email to open a new window to define the email notifications to be sent.
- Requirements - Defines the components that are required for this stage to be passed. For more than one requirement, click Add a new Requirement Set to add multiple components, such as the different levels of education and experience that are required in order to pass this requirement's stage. You can combine requirements with AND or OR combinations using the drop-down list.

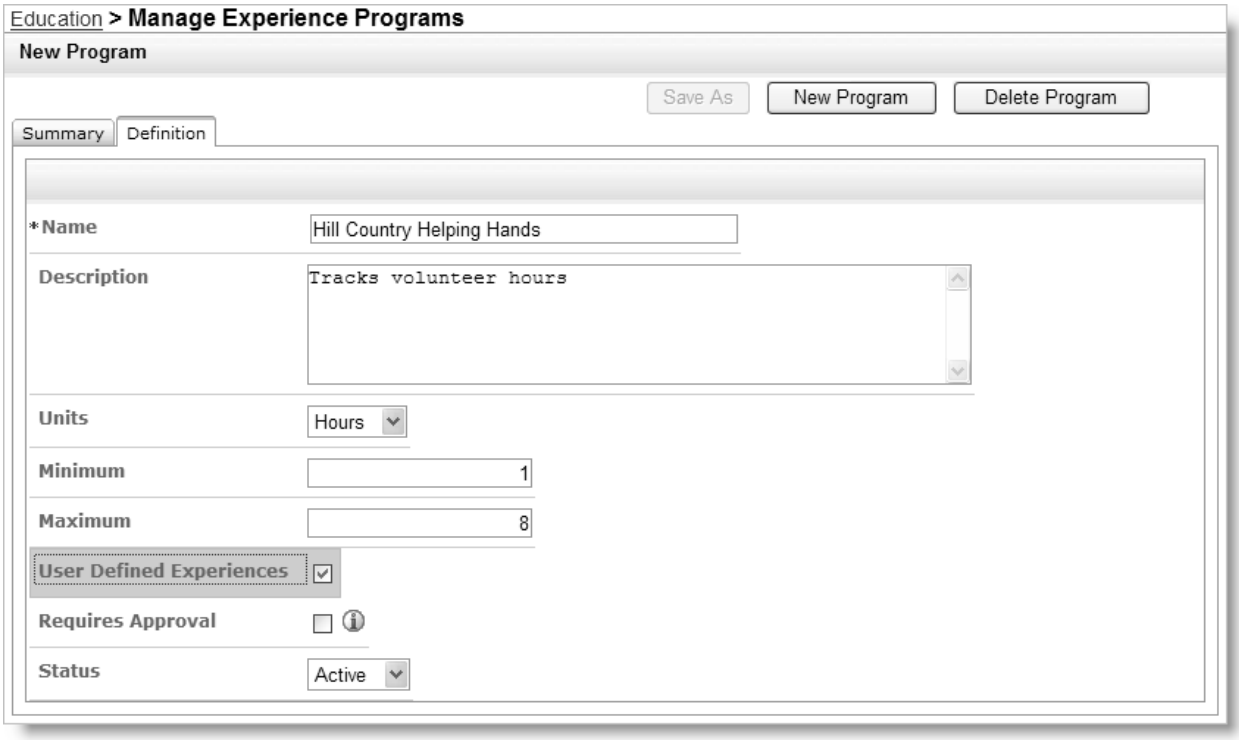
Manage Experience Programs window

This window lists previously defined experience programs.

Manage > Education > Manage Certification Programs

Experience Program - Definition tab

This window defines an experience program.



Manage > Education > Manage Experience Programs, add or select a program and then click the Definition tab

Definition

This area specifies the characteristics of the experience program.

Units - Defines the measurement for the experiences contained in the program including Credits, CEUs, or Hours. CEU stands for Continuing Education Unit.

Minimum - Indicates a whole-number value for the minimum units that an experience in this program can contain. For experience programs, consider that members may enter their own values for earned units.

Maximum - Indicates a whole-number value for the maximum units that an experience in this program can contain.

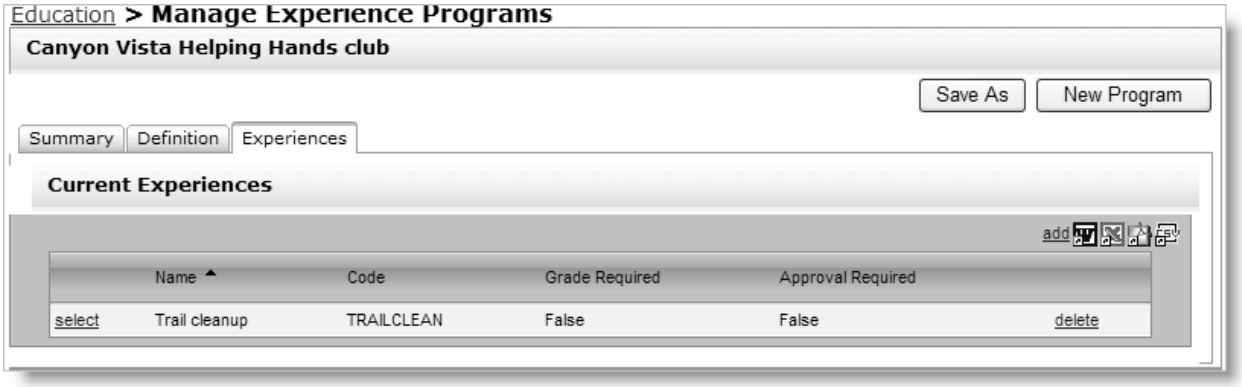
User Defined Experiences - Enables members to enter their own experiences in the Public view.

Requires Approval - Select this option if you want to require that staff members approve the experience before the units are credited to the member in their History.

Status - Indicates if the experience program is currently Active, Inactive, or Remove. Only experience programs marked Active are available for selection. Members cannot sign up for Inactive programs. Experience programs with a status of Remove do not appear in the list of experience programs. Use a status of Remove only for an experience program that does not have experiences associated to it.

Experience Program window - Experiences tab

This window defines the components that make up the experience program.



Manage > Education > Manage Experience Programs, add or edit an experience program, Experiences tab

Current Experiences

This area specifies which experiences have already been defined.

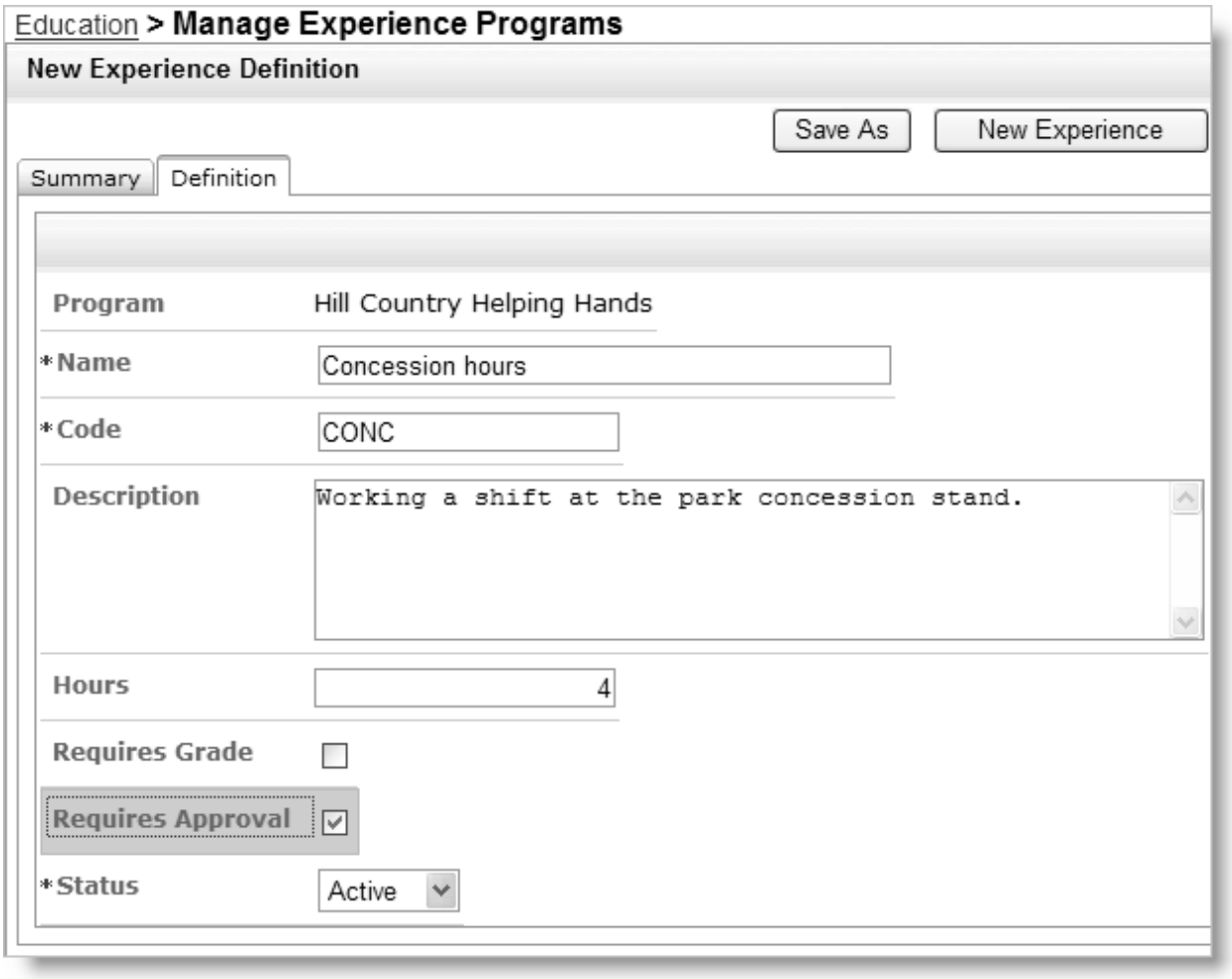
- Code - The shortened reference tag for the experience.
- Grade Required - True indicates that a staff member must assign a grade for the experience.
- Approval Required - True indicates that a staff member must approve the experiences before the member can see them in the History area.

Experience Program window - Experience - Definition tab

This window defines experiences that can be part of a program and also defines the offerings. Experiences are the building blocks of experience programs.

Tips

- You can clone existing experiences by clicking Save As.



Manage > Education > Manage Experience Programs > create or select an Experience > Definition tab

Definition

This area specifies experiences.

Code - The shortened reference tag to the experience.

Hours - Enter the number of expected hours for this particular experience.

Requires Grade - When selected, indicates that a staff member must assign a grade for the experience.

Requires Approval - When selected, indicates that a staff member must approve the experiences before the member can see them in the History area.

Status - Indicates if the experience is currently Active, Inactive, or Remove. Only experiences marked Active are available for selection when creating an experience program. You cannot select an Inactive component as part of an experience program. Experiences with a status of Remove do not appear in the list of experiences. Use a status of Remove only for experiences that do not have programs associated to it.

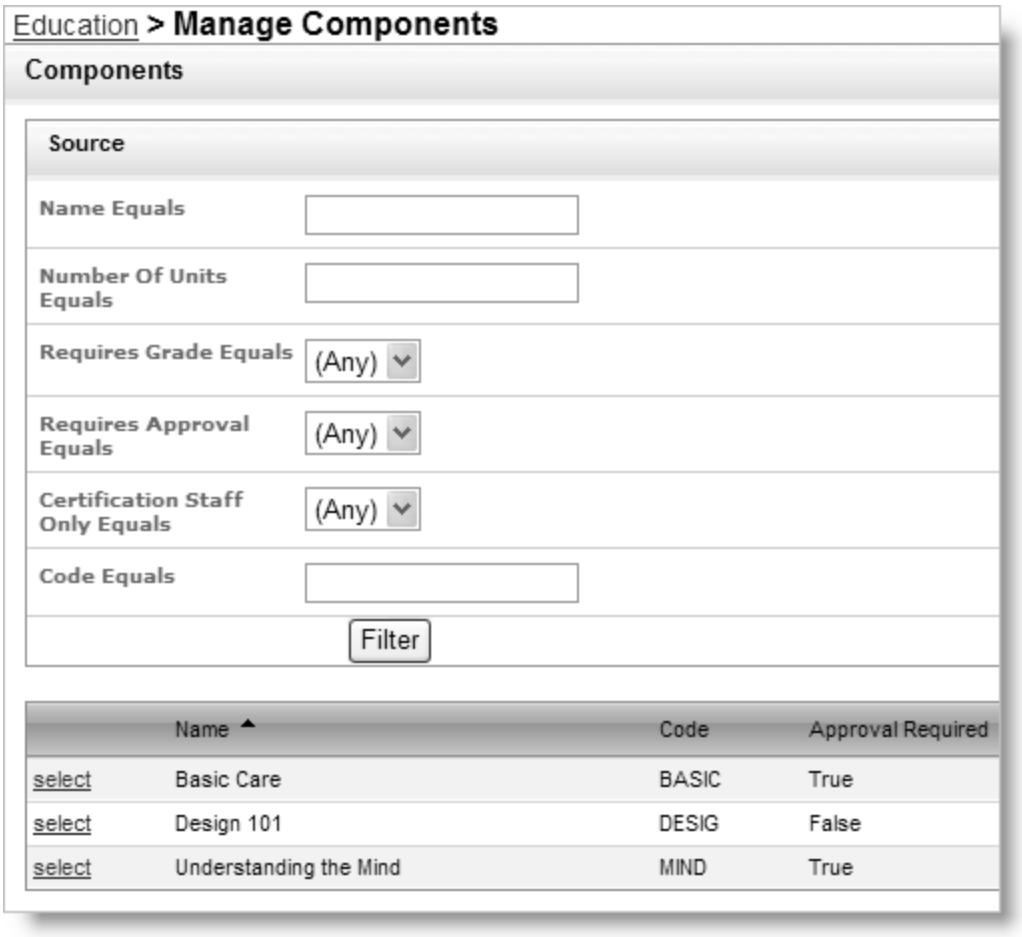
Manage Components window

This window defines and searches for components of certification programs.

A component is anything that is required of a student to complete a certification program. Usually, this is a specific offering on a specific date, such as a class, seminar, or exam; however, components can be other types of requirements, such as enrollment or application fees, applications, resumes, or letters of recommendation.

Note:

- Components are the smallest building blocks of a certification program. The first step in creating a certification program is to define the components required for program completion.
- You can clone or copy components and use them for other programs.



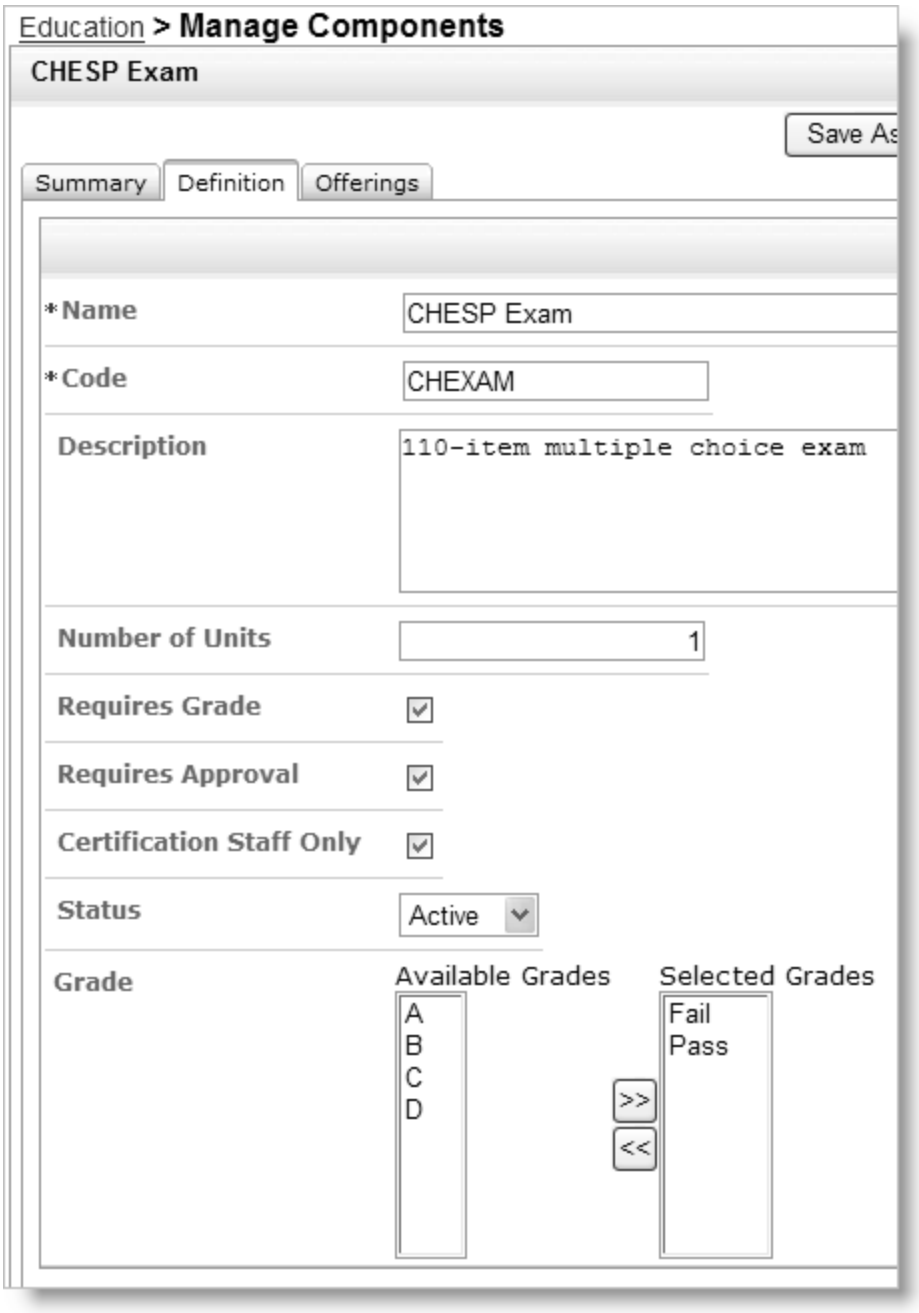
Manage > Education > Manage Components

Source

This area specifies a filter for the list of components below. Enter or select the limiting information and click Filter to show fewer components in the list.

Component Definition window

This window defines components, which are the building blocks of certification programs.



Manage > Education > Manage Components > click Create new Component

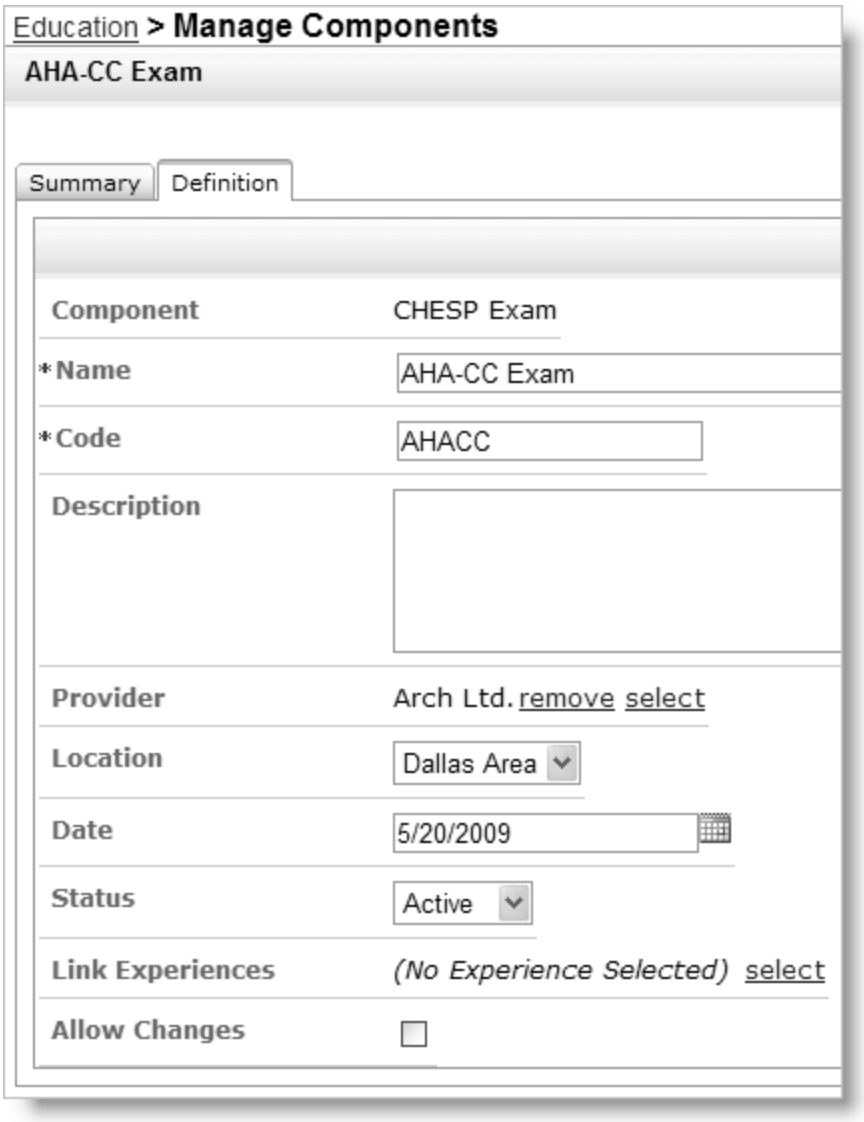
Definition

This area specifies the details of the component such as the number of units the student earns for completion, or the grade available.

- Code - Indicates the code that you can use to look up the component, up to 50 characters in length. Enter only letters and numbers, no symbols.
- Number of Units - Defines a number value to indicate how many units such as credits, or hours, a student earns upon completing this component.
- Requires Approval - Indicates that staff must approve completion of this component.
- Certification Staff Only - Indicates that a staff member can offer a "free pass" for this component. For example, if you want to allow a passing grade for an exam because the member has demonstrated abilities but cannot take the exam, you can use this option on a component to allow the participant to pass through the stage.
- Status - Indicates if the component is currently Active, Inactive, or Remove. Only components marked Active are available for selection when creating a certification program. You cannot select an Inactive component as part of a certification program. Components with a status of Remove do not appear in the list of components. Use a status of Remove only for components that do not have programs associated to it.
- Grade - Defines values for the grading system you want to use for this component.

Component Offerings window

This window defines the offerings for a specific component. Components are the smallest building blocks for certification programs, and offerings define specific dates and locations for that component to be offered.



Manage > Education > Manage Components > click Create new Component, create Component Definition, click Save, click Offerings tab, and then click Create new Offering Definition

This area specifies the offerings for the component, such as a specific date for an exam.

Code - Defines the code that you can use to look up the component, up to 50 characters in length. Enter only letters and numbers, no symbols.

Provider - Defines the person or company that manages the offering or gives the training. This list is created based on the records selected in the Education > Manage Providers area.

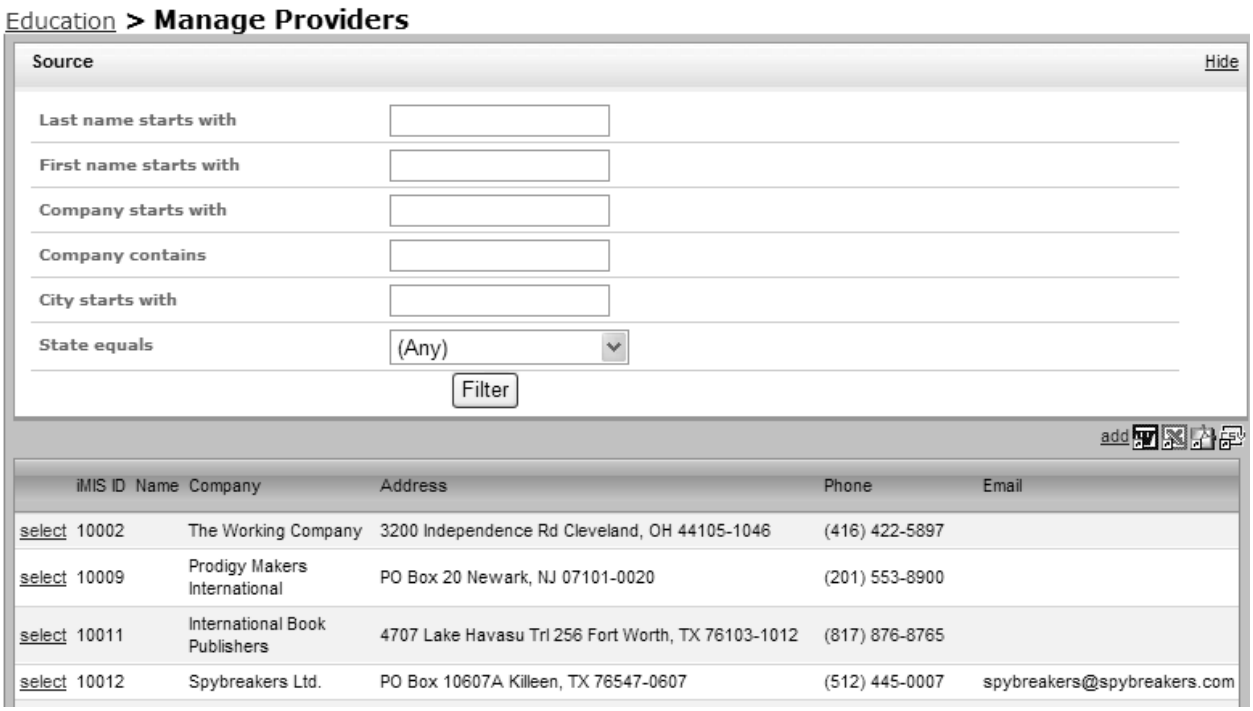
Location - Defines the place where the offering will be held. This list is also created based on the records selected in the Education > Manage Providers area.

Link Experiences - Defines which experiences are pre-requisites for this offering. Linking the experiences to an offering enables the registrant to enter experiences when registering for this offering. Also, you can view experiences when you review the component registration.

Allow Changes - When selected, this offering specifically enables registrants to enter information from a previous course, such as credit hours from another organization that occurred in the past. They can enter a grade, date, and description or notes from that prior course work, work experience, volunteer hours, or training class. When you mark a component's offering with Allow Changes selected, ensure that you also select Staff Approval in the component to ensure that user's defined offerings do not automatically qualify them for the next certification program stage.

Manage Providers window

This window enables you to select providers of training or other experiences based on your contact records in your iMIS database.



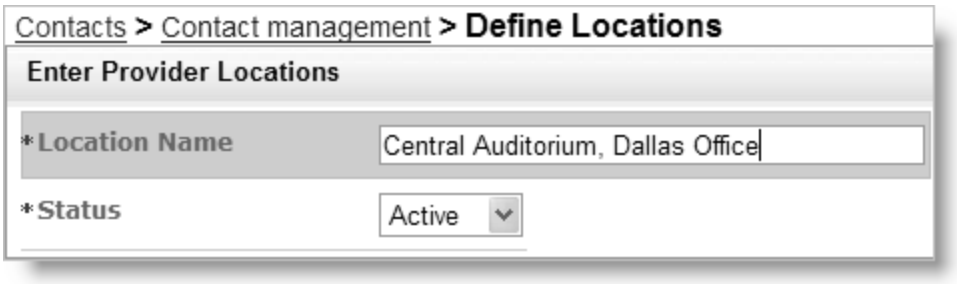
Manage > Education > Manage Providers

Source

This area specifies the items with which you may filter the providers list.

Define Locations window

This window defines places where you can offer training courses or other real-time interactions.



Contacts > Contact management > Define Locations

Understanding certification and experience programs

Program groups

Program groups associate multiple certification or experience programs together, allowing you to have one program be a pre-requisite for another program. This grouping enables an initial certification program as a pre-requisite accomplishment, before the participants begin a maintenance certification program.

Certification programs

Certification programs track participants' progress towards earning certification through requirements built on stages. At the completion of a program through all the stages, you award the member certification in that particular program.

Components build certification programs

A component is anything that is required of a student to complete a certification program. Usually, this is an event, such as a class, seminar, or exam; however, components can be other types of requirements, such as enrollment or application fees, applications, resumes, or letters of recommendation. You can clone or copy components and use them in other programs. You select components when defining the program's multiple stages made up of requirements.

Components are the smallest building blocks of a certification program. The first step in creating a certification program is to define the components required for program completion.

Certification programs consist of stages which contain requirements. When you select the program, and look at the requirements, you can see all the stages for that program.

When you select a component, you can see all the offerings for that component.

Experience programs

Experience programs enable members to enter and display activities they have participated in, such as volunteer work hours, which are not directly credited to a course or class. With an experience program, there is no end goal of earning certification.

Experiences build experience programs

Experiences are intended to enable your organization to keep track of defined tasks or countable metrics for their members. Experiences could be defined as volunteer hours, community service hours, or attending a meeting.

An experience definition can exist without a program associated with it. Also, not all experiences include countable units, although in the case where no units of measure are awarded, then you can use a pass or fail criteria for assurance of completion of that experience.

An experience must belong to one program in order to display or have members register for the experience. Unlike components, experiences are tied to a single experience program and only exist inside the experience program and cannot be used across multiple programs.

Offerings

Offerings are the specific date, time, and location that a member can complete a component or experience. A component may have multiple offerings, such as different dates when a course is offered. Offerings may be related to an event and a product, such as a fee-required training class offered at a set location on a certain date and time or a trail clean-up date that earns a person experience hours.

Products related to certification

Products are charges for a certification component, such as an application fee or a charge for a course registration. If you want to charge for participation, the product for the fee or charge must already be defined, and you must direct members to purchase the product. You associate the component with the product when you define the component. Inform your members that when they purchase the product in the Public view they must sign up for the offering separately.

Events related to certification

You might like to use iMIS Events synchronized with the defined dates and times for a particular offering. If you want an event associated with a component such as a training class, the event or function must already be defined. Inform your members that when they register for the training class they are not automatically associated with the certification component's offering and must register for the offering separately.

Certification records management

Certification records management is the process of keeping records and tracking member participation in an experience or certification program, which comprises the following activities:

- Managing participant records, including number of people registered for a certain course.
- Registering certification candidates or guide certification seekers to register using the Public view.
- Recording participation in a certification course.
- Printing transcripts.
- Determining credits earned by a particular member.
- Purging inactive registrations.

These registration and enrollment tasks can be performed by the customer or member using the Public view:

- Registering for a certification course.
- Recording participation in an experience.
- Determining credits earned.

Who depends on this?

Your certification records management tasks must be completed before anyone can achieve certification using one of your certification programs.

What must be done before you can start?

You cannot perform certification records management tasks until after:

- The person responsible for certification program management has defined experiences or certification programs with the related fees or events.

Putting it all together

Certification records management comprises two general workflows:

- The process of registering and tracking certification applicants entails the following actions, which must be performed in the order shown:

1. Register applicants or direct member to register themselves.
2. Approve or record participation in experiences.
3. Approve or record completion of programs.

- The process of keeping certification records entails the following actions, performed as needed:
- Purge inactive registrations.
- Cancel registrations.
- Print transcripts.
- Determine status, progress, number of credits earned.

Certification registration and approvals

Tracking registration for certification courses or certification programs involves knowing who is registered and getting counts of the number of registrants.

Students can register themselves in the Public view, or your staff can register students for programs and components in the Education feature on the Web view. This registration process includes processing certification orders, issuing invoices, and making payments.

You can test for an individual student's completion of the program after students have completed the requirements for a program or a portion of a program.

Registering certification candidates

When a student has expressed interest in earning the certification offered by your organization, either enroll the student in the certification program or give them instructions for enrolling using the Public view.

Before you begin

If the student is not already a contact record in your iMIS database, add their contact information.

Ensure that the certification program exists and has a Status of Active.

Ensure that components and offerings exist for the certification program.

To enroll a member in a program

1. Select Manage > Education> Analyze Progress.
2. Under the intended certification program statistics chart, click Register a contact.
3. You can search for the person you want to register, or you can register multiple people by selecting more than one row.
4. Click Register.

You can confirm the registration by viewing the statistics count in the Analyze Registrant Progress area for that certification or experience program.

To enroll in a program or class from the Public view

1. If needed, create a user ID for the organization's web site.
2. Log on to the organization's web site using the iMIS Logon information.
3. Click My Account.
4. Click Certification.
5. Under the intended certification program, click Register.

Purging inactive registrations

You purge inactive registrations when the member has decided not to continue the program or when the experience or certification program is no longer offered.

A purge does not delete the contact record, it deletes the related recorded registration information.

A person's registration is considered inactive when they have registered for an offering of a program that is cancelled.

Before you begin

You must log on as a user with the role of Certification Manager to purge inactive registrations.

To purge inactive registrations

1. Select Manage > Education> Purge inactive registrations.
2. If the list of inactive registrations is long, you can filter the list.
3. Select the registrations from the results list.
4. Click PURGE to purge the selected registrations.

Canceling registrations in certification programs

If a student must cancel or discontinue their participation in a certification program, follow these steps to ensure their registration is cancelled. You can either instruct members to cancel their registrations on the Public view, or log on to the Web view as a Certification User to cancel registrations.

Before you begin

To cancel registrations from the Web view, log on to iMIS with a user that has a role of a Certification User.

To cancel a registration for a member

1. Go to Contacts > Contact Management > Certification History.

2. If the member is enrolled for a certification program, you can cancel their registration under the intended certification program.

   To have a member cancel a registration from the Public view

1. Instruct your users to log on to the Public view.
2. Have the member go to My Account > Certification.
3. Under the program for which you want to cancel registration, click Cancel Program Registration.

   Tips

- Because products are not directly linked to certification fees, you must ask your members to contact you if they need a refund and then process the refund through the Orders system.

Certification records keeping

Certification records are kept so that members know their status towards achieving certification or the number of CEUs they have attained. Depending on how the certification program is defined, there are many different records that a user can retrieve.

What records does iMIS store?

Each member can log on to the Public view and see a record of their participation in experiences or certification programs.

In Education available on the Web view, no Activity records are stored based on participation in certification programs or experiences.

What is a transcript?

A transcript is a report indicating what courses, experiences, or certification programs a member has participated in or received credit for.

What defines participation in a class?

Each component listed in Education > Manage components has different definitions for participation in each stage and what requirements are needed to move forward through the stages.

What defines credit in a class?

Each component defines stages and requirements that define course or class credit.

Printing transcripts

A transcript is a record of the courses taken as well as dates and assessment such as a grade or pass/fail indicator. You print transcripts when a participant needs a record of their progress or proof of completion. You can either direct members to print their transcripts or print transcripts for members. These transcripts are also called certification history.

Before you begin

Because the transcripts are PDF files, printing transcripts requires that you have the free Adobe (see "Certification System Options window")® Reader® installed.

Ensure that the member has participated in some certification or experience programs before printing a transcript.

To print a transcript

1. Have the registrant log on to your Public view website.
2. Go to Manage Account > View experience history.
3. Print the transcript.

Tips

- The transcript contains your organization name, the date the transcript was printed, the program name, provider, location, dates, and number of units earned. You cannot currently customize the printed transcripts.
- You must be licensed for certification in order to show links to a transcript in the Public view.

Analyzing progress in a certification program

You may want to update information for students who have completed a certification program and also note progress on their journey to complete a certification program.

Before you begin

Experience or certification programs must already be defined, offerings must be defined, and students must be registered for offerings.

To determine how many students are in a program

1. Select Manage > Education> Analyze Progress.
2. If needed, scroll down to see the program you are interested in.
3. From the pie chart legend, you can see the values for these statuses:

- Earned
- Active, but not earned
- Grace Period
- Expired

To view additional statistics about programs

1. Select Manage > Education> Analyze Progress.
2. If needed, scroll down to see the program you are interested in.
3. Below the Overall stats pie chart, you see additional details for each certification program's name. Those charts include number of units and active enrollments for the program.

Tips

The following information can be helpful when analyzing progress.

- Click an area on the pie chart to see a table showing the contacts that are in that state, such as Enrolled and earned.

Approving experiences

Periodically you must approve a member's participation in an experience component based on the definition, such as completing a set number of volunteer hours.

Before you begin

Experience programs must already be defined, experiences must be defined, and members must have recorded participating in an experience that requires staff approval.

To approve experiences

1. Select Manage > Education> Approve Experiences.
2. If needed, filter the list by date or by program, for example.
3. Either approve all experiences listed, or select specific experiences and approve only those selected.

Reviewing for completions

At regular time intervals, you should review the programs to see if approvals or grades are needed or if associated products have been purchased.

Before you begin

Programs must be defined, and members registered or active in the programs.

To review completion of a certification program

1. Select Manage > Education > Review Completions.
2. If needed, filter the list by date or by program, for example.
3. If you want to view only those records that have completed a program, check the list for completions.
4. If you want to approve the entire filtered list, approve all the records in the list.

Certification records windows

The windows described in this section are used when performing certification records management tasks.

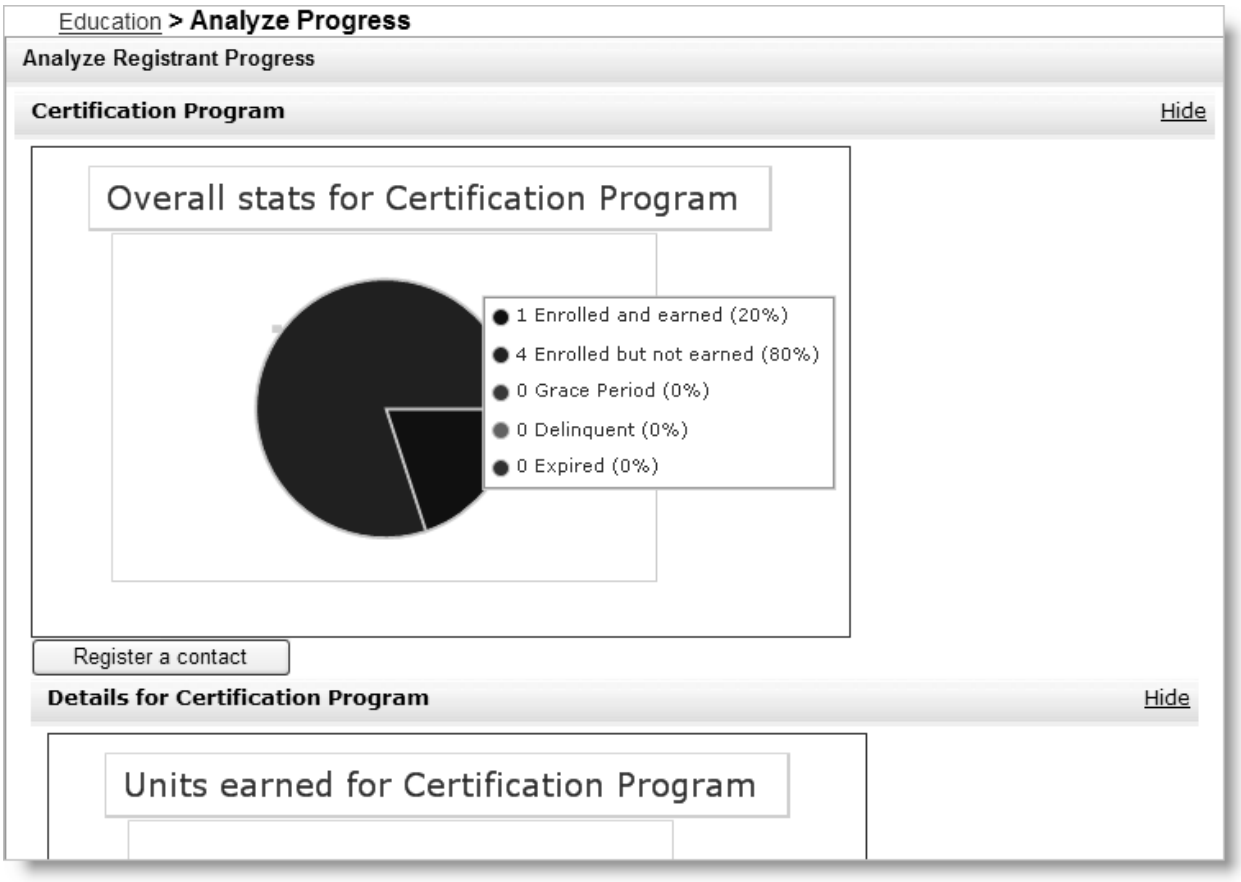
Note: The documentation might not match your product. Your organization can customize iMIS, license fewer features, or limit your security access, all of which affect the fields that you see in the product interface. Moreover, the documentation does not cover every window or window element. Windows and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

Analyze Progress window

This window lists certification programs and a graphic showing the numbers of members in different statuses for that program using a pie chart.

Tips

- Click the Hide link to compress the view of that certification program to one line and click the Show link to expand the view.
- Click Register a contact in this window to register multiple contacts for a program.



Manage> Education > Analyze Progress

Overall stats for <certification program>

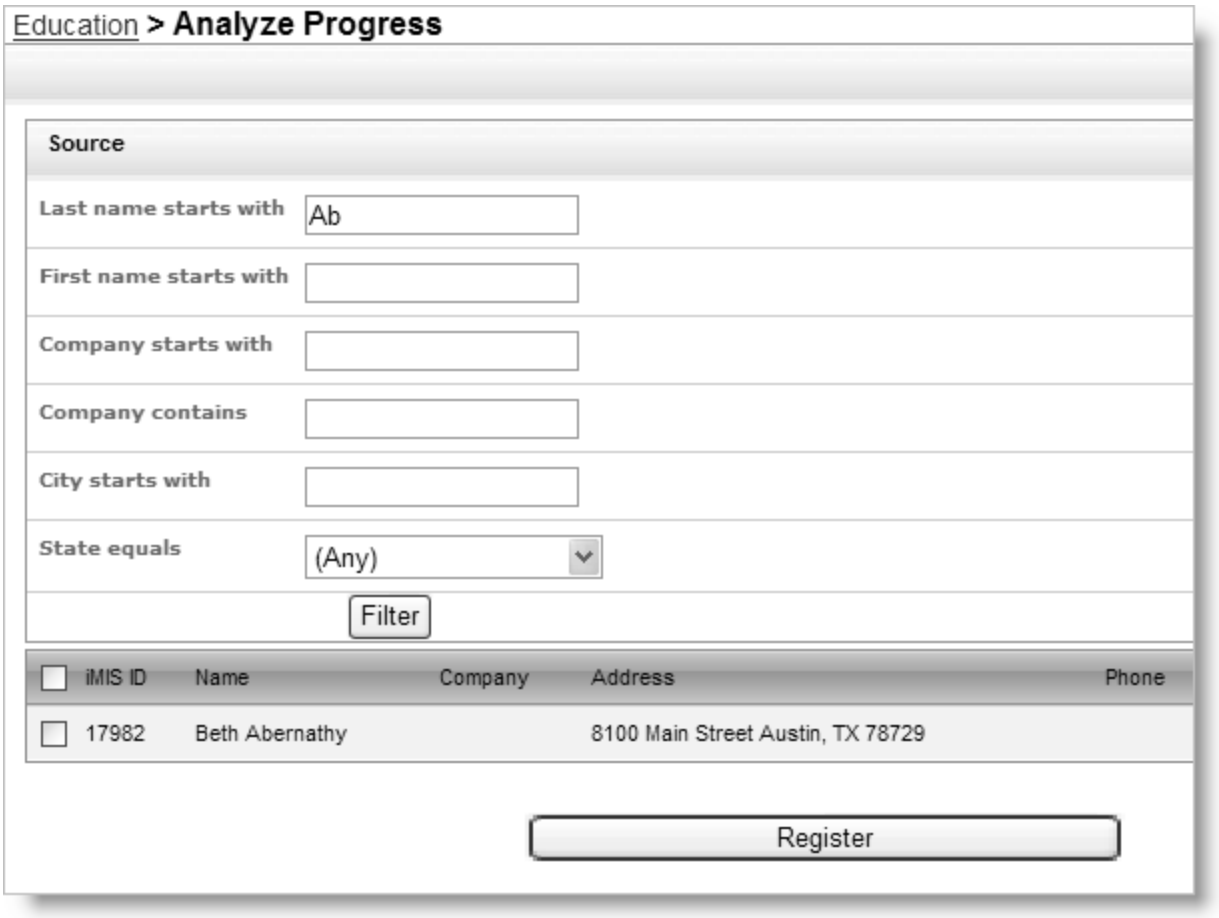
This area specifies the statistics for a certification program in a pie chart.

Units earned for Certification program

This area specifies the units earned based on the Credits, Hours, or CEUs defined in the certification program.

Analyze Progress - Register window

This window enables you to register a single contact or more than one contact for a certification or experience program.



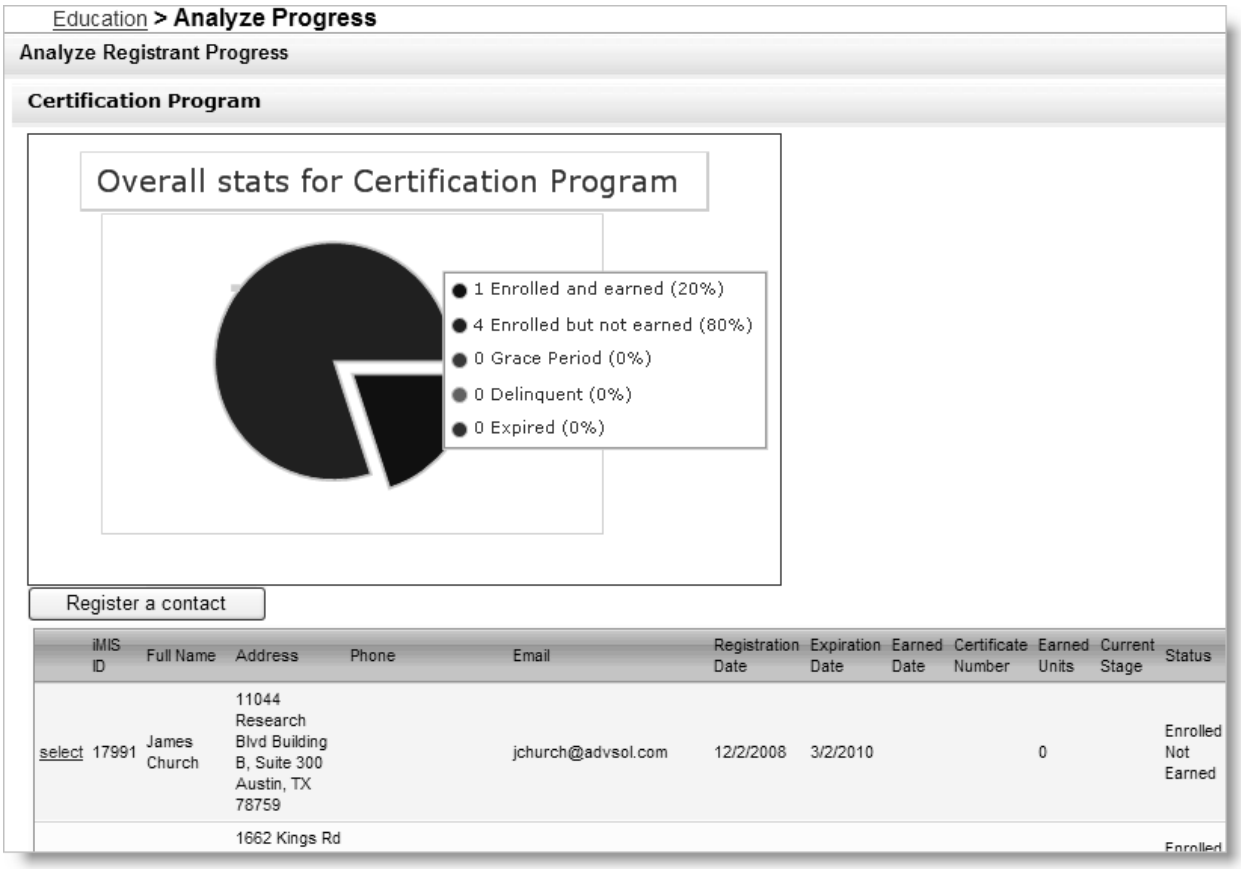
Manage > Education > Analyze Progress, and then click Register a contact under the appropriate program

This area specifies the list of contact records from which you can choose.

- Filter - Enter the limiting information in the fields and then click Filter to narrow down the selections.

Analyze Progress - Certification participants window

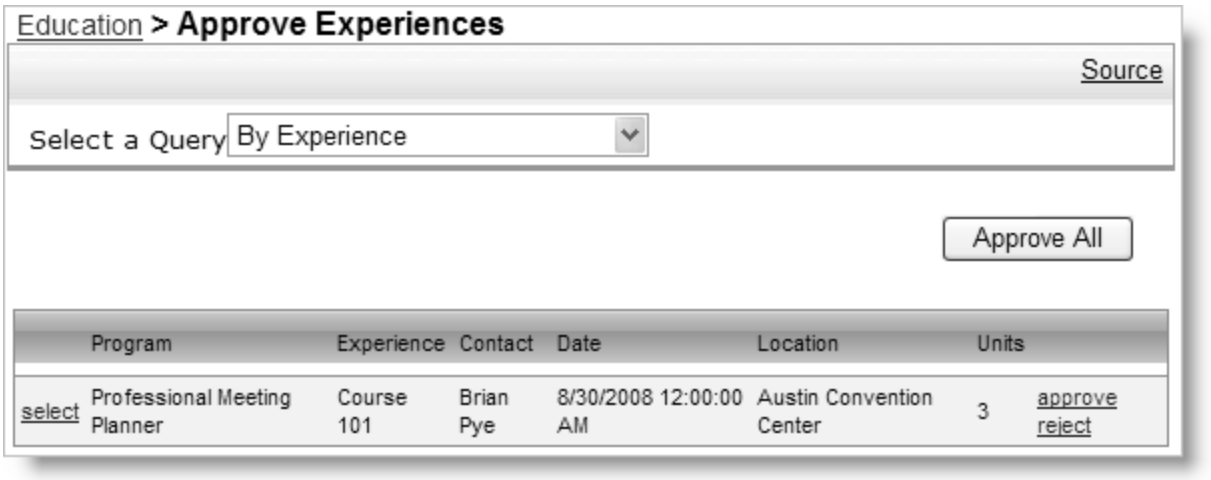
This window displays a list of the participants in a certification program including their current status.



Manage > Education > Analyze Progress, and then click the label for which you want to display participants (such as Enrolled but not earned)

Approve Experiences window

This window lists experiences that require staff approval before moving to the next stage based on a query. You can change the order for the list, and approve the listed completed experiences.



Manage> Education > Approve Experiences

Approve Experiences

Select a Query - The Recently Approved Experiences query lists all registrants who have completed an experience that requires staff approval. You cannot change the default query. Choose By Contact to sort by the contact's completions, choose By Date to sort by recent or past completions, or choose By Program to sort by completions grouped by experience program.

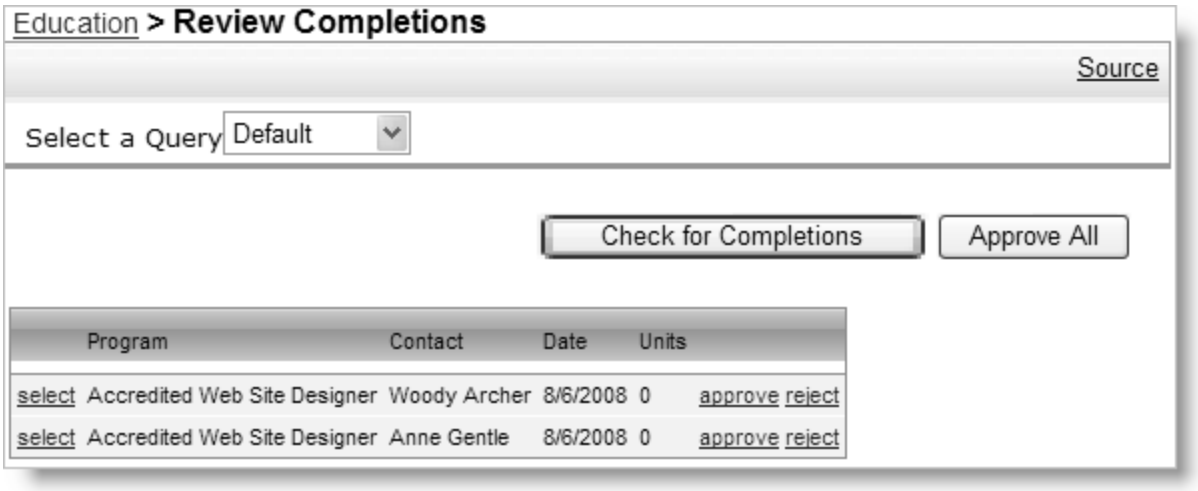
Approve All - Approves all the records returned by the query.

Review Completions window

This window enables you to approve and review completions of components. This window specifies the query to get the list of contact records from which you can choose as well as offering the buttons for checking and approving completions.

Tips

- You can choose to check for completions by date, by contact, or by program.



Manage> Education > Review Completions

Review Completions

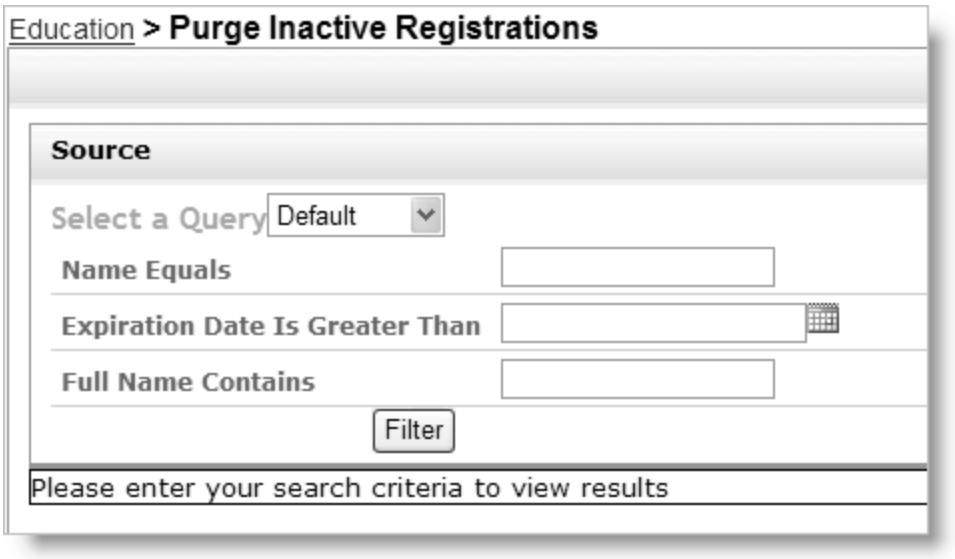
Select a Query - The Default query lists all registrants who have completed a program. Choose By contact to check for a contact's completions, choose By date to check for recent or past completions, or choose By program to check for completions only in a specific certification or experience program.

Check for Completions - Runs the selected query to search the database for completed offerings.

Approve All - Approves all the records returned by the query.

Purge Inactive Registrations window

This window lists records that can be purged from a certification program enrollment, which does not purge the contact record from the database.



Manage> Education > Purge Inactive Registrations

Source

This area specifies the list of participants that are marked as inactive registrants in the database.

Select a Query - Selects either the default query or returns only the inactive registrations within a certain program if you select By module.

Events Administration

Event Definition

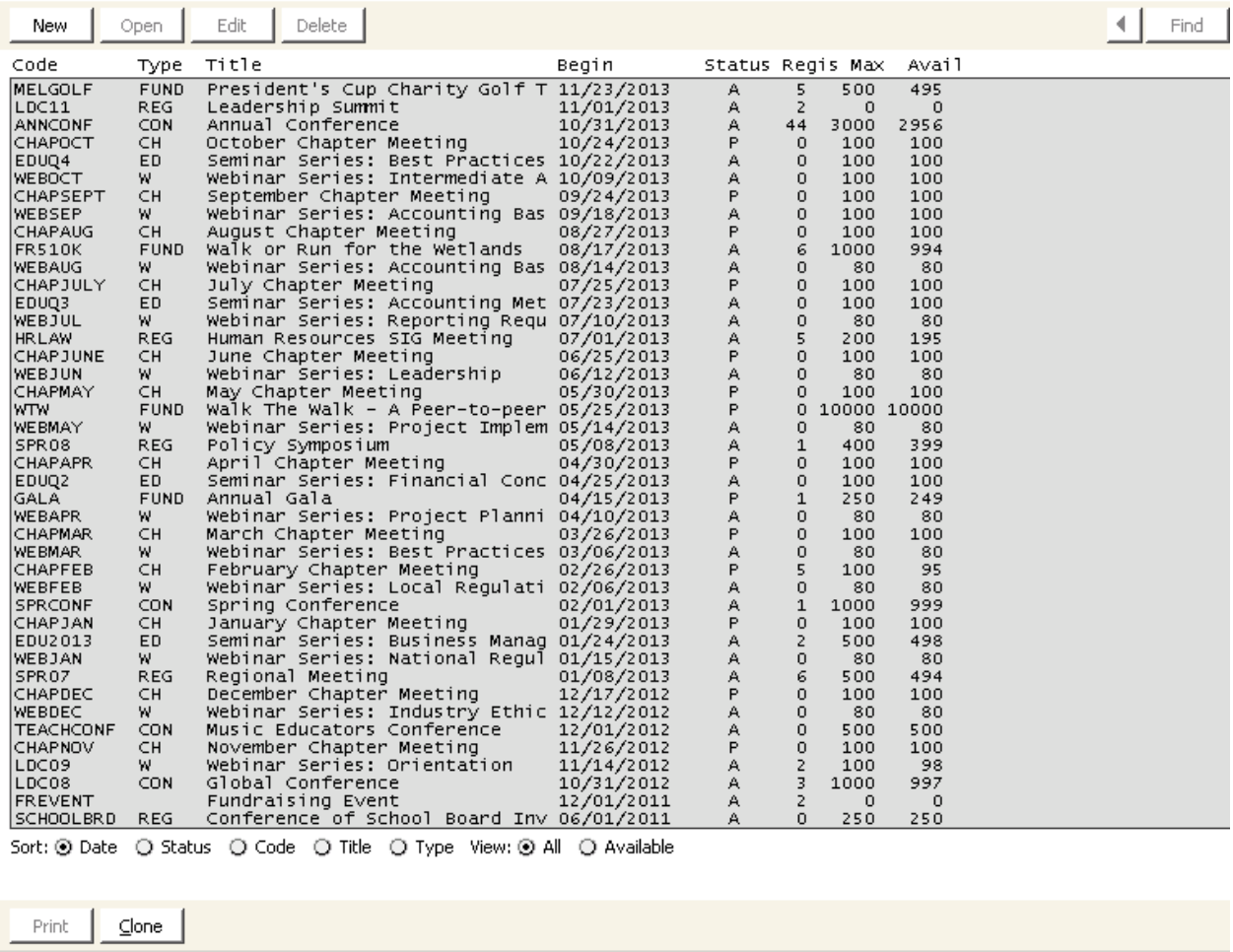
When defining and planning events, you enter the key information iMIS uses for each event and its functions. This information, in turn, enables all other Events operations from registrations and confirmations to inquiries and reporting. Defining and planning events involves the following steps:

- Defining and cloning an event
- Entering basic event information
- Defining separate function data
- Linking to primary functions
- Defining event fee information
- Entering event resources information.

Viewing available events

You can view defined events and their status through the Define an event window.

Define an event window



Admin Console: Home > Events > Define an event

Desktop: Events > Define an event

Code

Lists the user-defined event codes defined in the Define an event window (from Events, select Define an event, and double-click an event).

Type

Lists the user-defined event types defined in the Define an event window (from Events, select Define an event, and double-click an event).

Title

Lists the user-defined event titles defined in the Define an event window (from Events, select Define an event, and double-click an event).

Begin

Lists the event's start date defined in the Define an event window (from Events, select Define an event, and double-click an event).

Status

Lists the event status as defined in the Define an event window (from Events, select Define an event, and double-click an event):

- A - Active (registrations are accepted)
- P - Pending (default, still in the planning stages)
- F - Frozen (currently unavailable for registration)
- C - Closed (registrations no longer accepted)
- X - Canceled

Regis

Lists the current number of registrants excluding cancelled, cancelled/transferred, and guests.

Max

Lists the maximum number of registrants allowed as defined in the Define an event window (from Events, select Define an event, and double-click an event).

Avail

Lists the number of open registrations remaining (Max minus Regis).

Sort

Specifies the sort order of the displayed events. The events can be sorted in descending order by begin Date, or alphabetically by Status, Code, Title, or Type. If an event has no begin date, it appears at the bottom of the list when ordered by Date. When sorted by

Date, multiple events with the same begin date are sorted in ascending order by the event Code.

View

Specifies whether the list displays All events or only Available events (Status = A).

Clone

Clones an event.

To view and sort the list of events

1. From Define an event window, sort the list by selecting the appropriate Sort option.
2. Filter the list by selecting the appropriate View option.

Cloning an event

Cloning enables you to copy and duplicate an event and its functions rather than having to create a new event. Cloning is useful when you need to set up events that are identical except for the dates and times. When you clone an event, the event and function definitions are copied from the cloned event to the new event.

To clone an event

1. From Define an event window, select the event you want to clone.
2. Click Clone to open the Event Clone window.
3. Enter a new event code for the cloned event.
4. Click Save.
5. (optional) If iMIS is licensed for Hotels, and hotel information is defined for the event that is being cloned, iMIS asks if you want to copy hotel information:

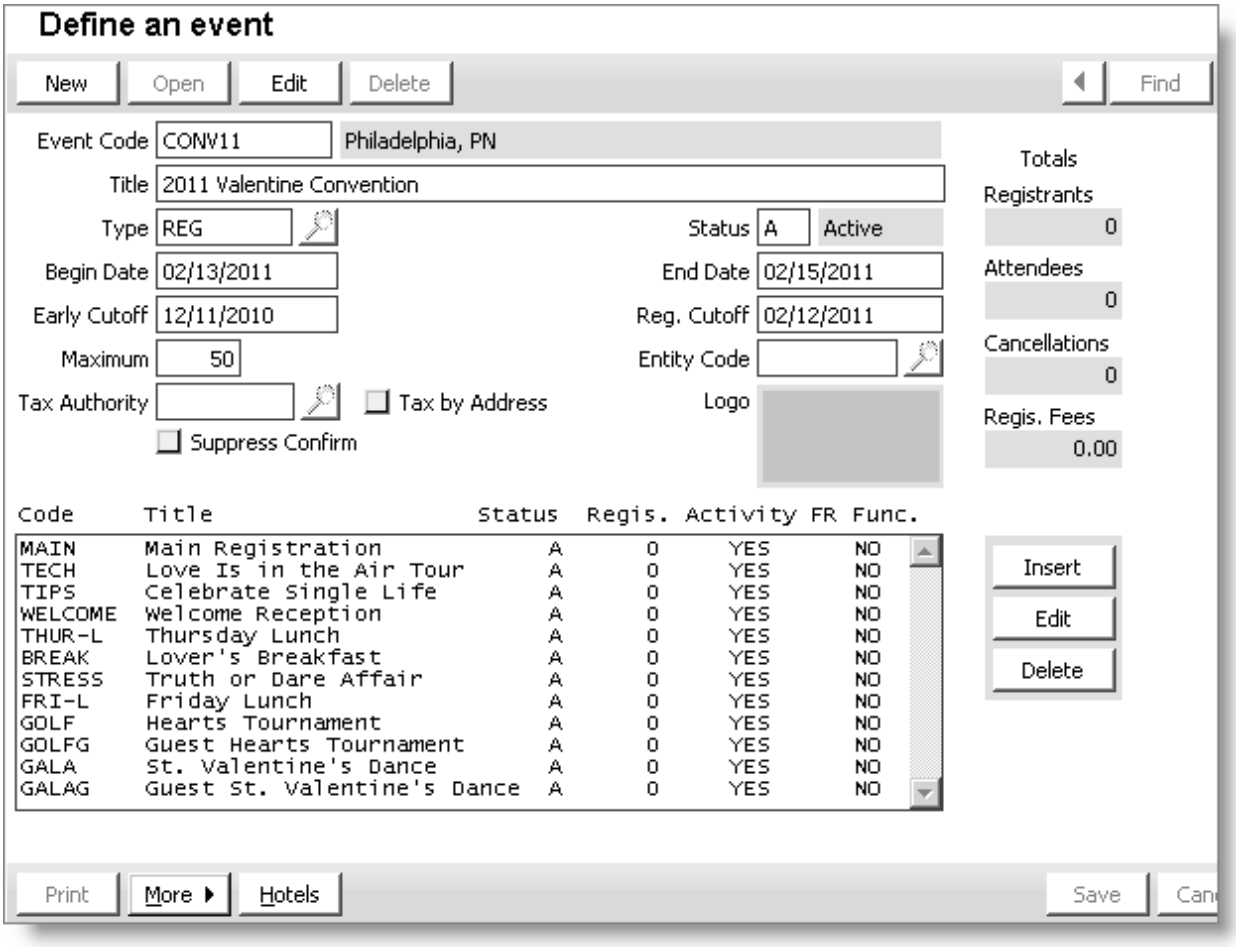
- Click Yes to copy the hotel information (including room types).
- Click No if you do not want to copy the hotel information.

6. Double-click the new event on the Define an event window to open it in the Define an event window.
7. Click Edit to make changes to the event dates, times, and details.
8. Click Save.

Defining a new event

Whether you are planning a conference, seminar, or any large or small event, you define an event in the Define an event window. Enter the basic information that defines the event in the window's fields.

Define an event - event details window



From Events, select Define an event, and click New

Event Code

Designates a unique code for the event. You can use a combination of letters and/or numbers to represent the event (do not use spaces, apostrophes, quotation marks, forward slash (/), or dashes).

> **Note:** Note: The content displayed in the Event Code field can be customized. See "Setting up advanced features.

Title

Specifies the name of the event. This title appears in windows and reports generated for this event.

Type

Specifies an event type.

The type defaults to EXPO for exposition events created using the Exposition module. Events to be managed using the Exhibition module should be set to EX.

> **Note:** Note: You can define additional type values on the MEETING_TYPE general lookup/validation table. For example, you can add AWARD for award ceremonies. For details, see Creating General Lookup/Validation Tables.

Status

This field specifies the event status:

- A - Active
- P - Pending (default, still in planning stage)
- F - Frozen (currently unavailable for active ordering., for example, on-site orders after an event has already started)
- C - Closed (orders no longer accepted)
- X - Canceled

> **Note:** Note: When you change the status of an event that is displayed on the web, it will take a few minutes before that change is reflected in the web view.

Begin Date

Specifies the event start date.

> **Note:** Note: The Begin Date determines when deferred income is transferred to earned income for an event.

End Date

Specifies the date the event ends.

Early Cutoff

Specifies the last calendar date a discounted rate can be applied for early registrations.

> **Note:** Note: If you do not vary fees for functions based upon the registration date, leave this field blank.

Reg Cutoff

Specifies the last calendar date the regular rate can be applied. If regular and late fees are set up as part of the event definition, any registrations entered after the regular cutoff date are automatically charged a late fee. If you do not charge a higher fee for late orders, leave this field blank.

Maximum

Specifies the maximum attendance limit for the event. The attendance limit and the number of available registrations (attendance limit minus registrations to date), displays for this event on the Define an event window.

Entity Code

(Displayed only when Multiple Entities is checked on the AR/Cash Set up module window) Specifies the accounting entity to which event income will be assigned. Event functions that do not specify an entity code will use this entity code. Event functions that specify their own entity code will ignore this code.

Tax Authority

(Appears only when Canadian taxation is enabled) Specifies the Canadian tax authority that applies to the event.

Tax by address

(Appears only when Canadian taxation is enabled) For HST, designates this event as taxable according to the registrant's address, as for virtual events.

Tax by address causes the appropriate tax to be charged based on the province specified in the registrant's Preferred Shipping Address. If that is unavailable, iMIS defaults to the tax authority of the event. Registrants see the HST amounts itemized in their carts and receipts.

Note: Note: Events not using Tax by Address still charge tax using the event's tax authority, and iMIS respects the Tax Exempt designation on the Name Fin tab.

Suppress Confirm

Specifies that confirmation notices will not be printed for this event.

Logo

Specifies an event logo that can be printed on badges. If there is no logo in this area, iMIS uses your organization's default logo stored in the Organization Names window for badges.

Function list

Lists the functions that have been defined for the event. A value of YES in the Activity column indicates which event functions have the Create Detail Activity checkbox selected

on the Event Function Detail window, which results in MEETFUNC activity records being created for the function when the event is closed.

Totals

- Registrants - Displays the total number of registrants including cancelled and cancelled/transferred registrants, but excluding guests.
- Attendees - Displays the total number of registrants including guests, but excluding cancelled and cancelled/transferred registrants.
- Cancellations - Displays the total number of cancelled and cancelled/transferred registrations.
- Regis Fee - Lists the total registration charges for all of the event registrations.

Insert

Opens the Event Function Detail window.

Edit

Opens the selected function in the Event Function Detail window.

Delete

Deletes the selected function.

More

Displays a menu of the following event setup options:

- Description - Opens the Event Description window used for entering a text description of the event.

  Note: Place key search terms within the first 300 characters of the description. In the Public view, search truncates the description to 300 characters, so only text within that range yields search results for users.
- Address - Opens the Event Address window used for entering the event address and directions to the event.

- Coordinators - Opens the Event Coordinators window used for entering the names of event coordinators.
- Notes - Opens the Event Notes window used for entering additional event information as well as a SQL Registration Verification Calculation.
- Roster - Opens the Event Roster window, which displays a list of event registrants.
- Close Current Event - Closes the event.
- Cancel Current Event - Cancels the event.
- Exhibit Rules - Opens the Rules for Exhibition Complimentary Registrations window used to enter text table rules and calculations for awarding complimentary registrations.
- Web Options - Opens the Event Web Options window, which lets you set the appearance and behavior of registration on the web.

  Important: Some options apply to iPart-based events only: See Configuring event registration in iPart Essentials for details.
- Web Setup Wizard – Launches the Event Web Setup wizard to define details to be displayed on the web (Public view only).

  Hotels

  (Displayed when licensed for Hotels) Opens the Hotels window.

  To define an event

1. From Events, select Define an event to open the Define an event window.
2. Click New to open another instance of the Define an event window.
3. Enter an Event Code.
4. Enter an event Title.
5. Enter an event Type.
6. Enter an event Status.

Note: Events must be active before registrations can be processed. Online event registration is only available for events with an Active status.

7. Enter a Begin Date for the event.
8. Enter an End Date for the event.
9. Enter an Early Cutoff date.
10. Enter a Reg Cutoff date.
11. Enter the Maximum number of registrants you will allow to register for the event.
12. (optional) Enter the Entity Code that will receive event income.

    Note: The event entity code can be overridden at the function level.
13. (optional) Enable the Suppress Confirm option.
14. Click Save.

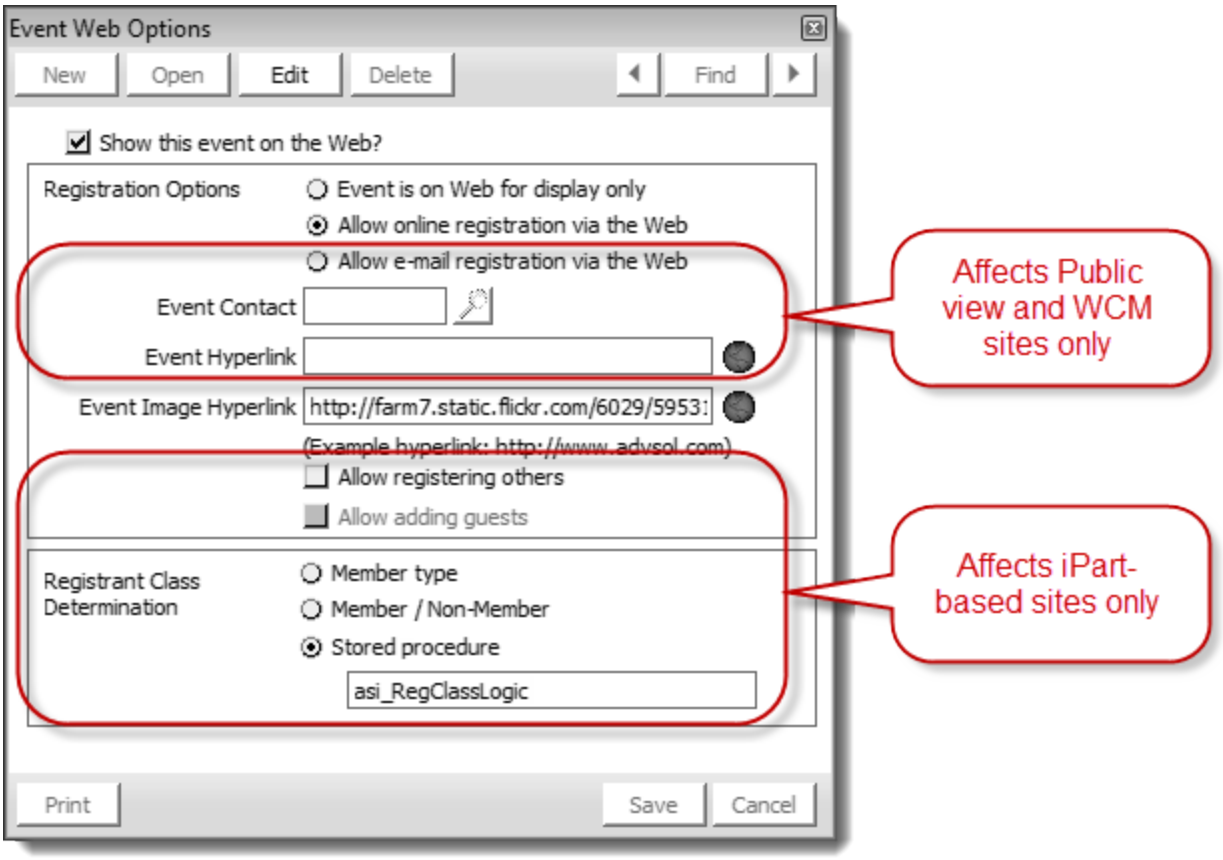
To modify an event

1. Select Events > Define an event to open the Define an event window.
2. Double-click the event you want to modify to open it in the detailed Define an event window.
3. Click Edit.
4. Make any necessary changes.
5. Click Save.

Defining Event Web Options

After defining the basics of the event, you can define how you want the event to appear and registration to behave on the web. Only two options (Show this event on the Web? and Event Image Hyperlink) affect every type of member-facing website; the other options apply to specific platforms only:

Note: Note: Staff users can search for all events, including events that are not web-enabled. You can only register for an event that has an Active status.



For Public view sites, note that you configure many of these iPart-only options using the Web setup wizard for events.

For iPart-based sites, see Configuring iPart-based event registration for details on using these settings. The Web setup wizard for events does not apply.

To make an event available on the web

Online event registrations are only available for events with an Active status.

1. In the Event Details window, click More > Web Options.

2. Enable the Show this event on the Web? checkbox.
3. (optional) Add an image to display on the web: enter a link in the Event Image Hyperlink field:

- Full path: Refer to an existing URL, such as http://example.com/myImage.jpg
- Relative path: Upload or select an image in Content Management > Manage images, and refer to it like this: /images/uploadedimages/myImage.jpg

  Tip: Image Manager lets you create subfolders, so you can group and organize images.

4. (Public view and WCM sites only) Specify these options:

- Select which Registration Option should be in effect:
- Event is on the Web for display only (useful for times before and after open registration)
- Allow online registration via the Web
- Allow e-mail registration via the Web
- (optional) Enter the Event Contact.
- (optional) Enter the Event Hyperlink.

5. (iPart-based sites only) Specify these options:

   Tip: You can use the Registration Option of Event is on the Web for display only to delay registration for an upcoming event while still allowing all details and pricing information to be viewable by your site visitors. Enabling this option disables the registration buttons and links.

- (optional) Enable Allow registering others, so that users can register others in their own organizations.
- (only available with Allow registering others) If you have functions for which this is appropriate, enable Allow adding guests.
- Select which Registration Class Determination should be in effect:
- (default) Member type, for pricing by registrant class

- Member/Non-Member, for pricing simply by membership status
- Stored procedure, for overriding the registrant class to implement pricing promotions, such as 50% off additional registrants from a given company. Your stored procedure can use the current registrant ID (which is supplied as a parameter to the procedure), calculate which class to assign, and return a valid registrant class; if it does not return one, default pricing remains in force.

6. Click Save.

Web setup wizard for events

(Public view only) The web setup wizard for events allows you to configure events and functions for online registration. You can access the setup wizard in two ways.

- From System Setup, select Set up events web components > Event setup, and select an event.
- From Events, select Define an event, select or create an event, and click More > Web Setup Wizard.

  You must log on as a user with rights to the Administrator or EventCoordinator security key to perform Event setup.

  > **Note:** Note: Staff users can search for all events, including events that are not web-enabled. You can only register for an event that has an Active status.

  Understanding Event setup steps

  You complete the tabs in the sequence given and click Next to proceed. First, you set up an Options page; at the end, you review a Summary page. This list encompasses all the tabs available and summarizes the options you set for each.

- Options: Determines which general information to enable or require from registrants.
- Reg. Steps: Allows the administrator to assign specific steps for the registration process.

- Registrant: Determines which prompts to use to gather contact information about a registrant.
- Func. Groups: Determines which functions are in Function Groups to ensure that people are registered for assigned functions. These assignments are only needed for functions not defined with the "Automatic Option" in iMIS Desktop view.
- Guest: Determines which general information to enable or require concerning guests.
- Survey: Allows the administrator to ask questions and select answer types.
- Summary: Offers remaining miscellaneous options.

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

> **Note:** Public view administrators can use the Setup web components task list on the System Setup feature to configure items for the Public view including labels for the various areas of the site and email and graphics settings.

Defining event setup Options

The Options tab of Event setup allows you to enter optional information for the registration process.

On-line registration cutoff date

Set a date to cutoff registrations by using the calendar provided in the On-line registration cutoff date field. This date can differ from the Early Cutoff or Reg. Cutoff dates in iMIS Event setup.

> **Note:** Tip: Registration cutoff dates are enforced for Public users only. Cutoff dates apply differently by user type (Public, Casual, or Full) to allow staff more flexibility in handling registration.

Registrant class determination

This area lets you specify how to determine registration fees.

- Map Type: Bases pricing on the registrant class that corresponds to the registrant's iMIS customer type. If an administrator chooses the Map Type method, a registrant's iMIS customer type corresponds directly to the registrant class for that individual. An administrator must determine pricing for every registrant class for each function recorded for this method to assign pricing properly. If no registrant class is created for a specific customer type, the pricing for that customer type will be incorrect.
- Member/Non-Member: Bases pricing on one of two registrant classes: members and non-members. The iMIS customer type assigned to each registrant is either member or non-member, regardless of the registrant class.
- Stored Procedure: Bases pricing on the registrant class that is returned by your stored procedure, which takes the registrant’s ID as its input parameter. Such stored procedures let you implement complex pricing promotions, such as 50% off additional registrants from a given company. If iMIS cannot find the stored procedure specified or if it fails, default pricing applies.

  Parameters - Your procedure must take one parameter, the registrant’s ID. Your stored procedure must contain all logic needed (including the Use Parent Company Pricing rules) to return a registrant class. Here is a simple stored procedure that returns a specific registrant class:

```
CREATE PROCEDURE [dbo].[asi_TestGetRegistrantClass]
    @RegistrantId varchar(10),
AS
BEGIN
```

```
    SELECT case @ RegistrantId when '146' then 'SPKR' else 'STD' END
END
```

Here is simple code to test this stored procedure:

```
exec asi_TestGetRegistrantClass '146'
```

Defining event setup Registration Steps

In the Reg. Steps tab, you can make modifications to the current default registration steps by optionally changing the names of individual steps in the Step 1, Step 2 and so on fields.

Order / Include under Step 3

Use the Order column to specify the order in which the included group names should appear. Specify the number of groups for functions by using the Include column. At least one group must be formed for attendees to register. Group1 is the Default Auto Enroll Group.

Optionally, enter names of specific groups attending the event under Step 3. If a new name is not entered, the default name will be used. The groups appear in online registration pages only if you check the Include checkbox.

The Default Auto Enroll Group must always be the first group.

Defining event setup Registrant information

Use the Registrant tab determine the content viewed by registrants during the Registrant step.

Registrant page message

Enter text that you want to appear on the page where the registrant enters or verifies their contact information.

Select the fields you want the user to submit

The Enable checkbox displays that field for the registrant to update but does not require them to add or update the data. The Require checkbox forces the registrant to add the data for that field. Required fields will have a bold field label.

For example, if the Enable and Require checkboxes are checked for the Email prompt field, the registrant is required to enter or update their e-mail address.

Defining event setup Function Groups

The modifications made in the Funct. Groups tab determine the content viewed by registrants during the Groups step.

You must enter information individually for every group created in Step 1. Beginning with Group1, you can complete a specific Group page message, assign functions, and move to another page concerning the next group, until each group has been configured.

- Group Page Message – Enter a message to inform the user that they are automatically enrolled for a function, if applicable.
- Select an Auto Enroll option – If the Automatic Option has been checked for a function in iMIS Desktop view Events > Define an event, the registrants are automatically registered for that function and assigned the pricing for that function based on their registrant class.
- iMIS Auto Enroll Functions – Selecting this option presents a list of functions assigned to the group at the user registration page. The administrator must choose at least one function from the Unassigned Functions box and move it to the Assigned Auto Enroll Functions box. The registrant may choose several functions during online registration, but then cannot continue registration until at least one of the Assigned Auto Enroll Functions is selected.

  Note: Functions that have the Guest Function option enabled do not appear in the list of available functions.
- Assigned Auto Enroll Functions – Many administrators decide to form several groups for registration and assign specific functions to those groups. Assigning functions allows an administrator to build customized tracks for registrants. Assigning functions to groups also allows an administrator to offer pricing for individual days or functions, rather than offering one set price for the entire event.

> **Note:** Note: When you create new Group pages, you are creating sub-tabs on the web-based interface that users cannot use the Previous and Next buttons to click

through. This means your users are warned that Previous and Next navigate through the larger steps of the registration process, but not through the Groups tabs. Because of this navigation design, web users need to click and fill out each tab while completing their registration.

Defining event setup Guests

The modifications made on the Guest tab determine the content viewed by registrants during the Guest step.

These are some important considerations when defining guest-attendee registrations, functions, and pages.

- If the Guest Function has not been enabled on the Event Function Detail window in iMIS Desktop, the guest registration process is not available on the web.
- If a guest badge function has not been created, no options will be available on the drop-down menu and Public view will not allow guest registrations.
- You can change the field label for these demographic fields using the Prompt fields. Changing the field labels does not change the field type.
- The Enable checkbox displays that field for the registrant to update but does not require them to add or update the data.

Guests page message

Enter text that you want to appear on the page where the registrant enters or verifies their guest's contact information.

Select the fields you want the user to submit

The Enable checkbox displays that field for the registrant to update but does not require them to add or update the data. The Require checkbox forces the registrant to add the data for that field. Required fields will have a bold field label.

For example, if the Enable and Require checkboxes are checked for the Email prompt field, the registrant is required to enter or update their e-mail address.

> **Note:** Note: The Public view administrator can also change the field label for these demographic fields using the Prompt fields. Changing the field labels does not change the field type.

Defining event setup Survey questions

The modifications made on the Survey tab determine the content viewed by registrants during the "Questions" step. You can enter questions related to the event or to specific groups. These questions allow you to collect additional information about the registrant that may apply to their registration for this event.

Answer Type

There are six different answer types available:

- Numeric – The registrant may enter only numbers.
- Multiple Selection – The registrant may select multiple (up to 10) answers. You must designate the number of choices offered to users, and write the answers that correspond to the question.
- Single Selection – The registrant may choose only one answer (of up to 10 choices).
- Multiple Line Text – The registrant may enter lengthy answers in a text box.
- Single Line Text – The registrant may enter a short answer of only one line in a text box.
- Yes/No – The registrant may only choose "Yes" or "No".

> **Note:** Note: After entering a question in the Question field, click Save to add it to the Select Questions box.

Verifying event setup with the Summary page

The Summary page contains all of the administrator's modifications and customized messages.

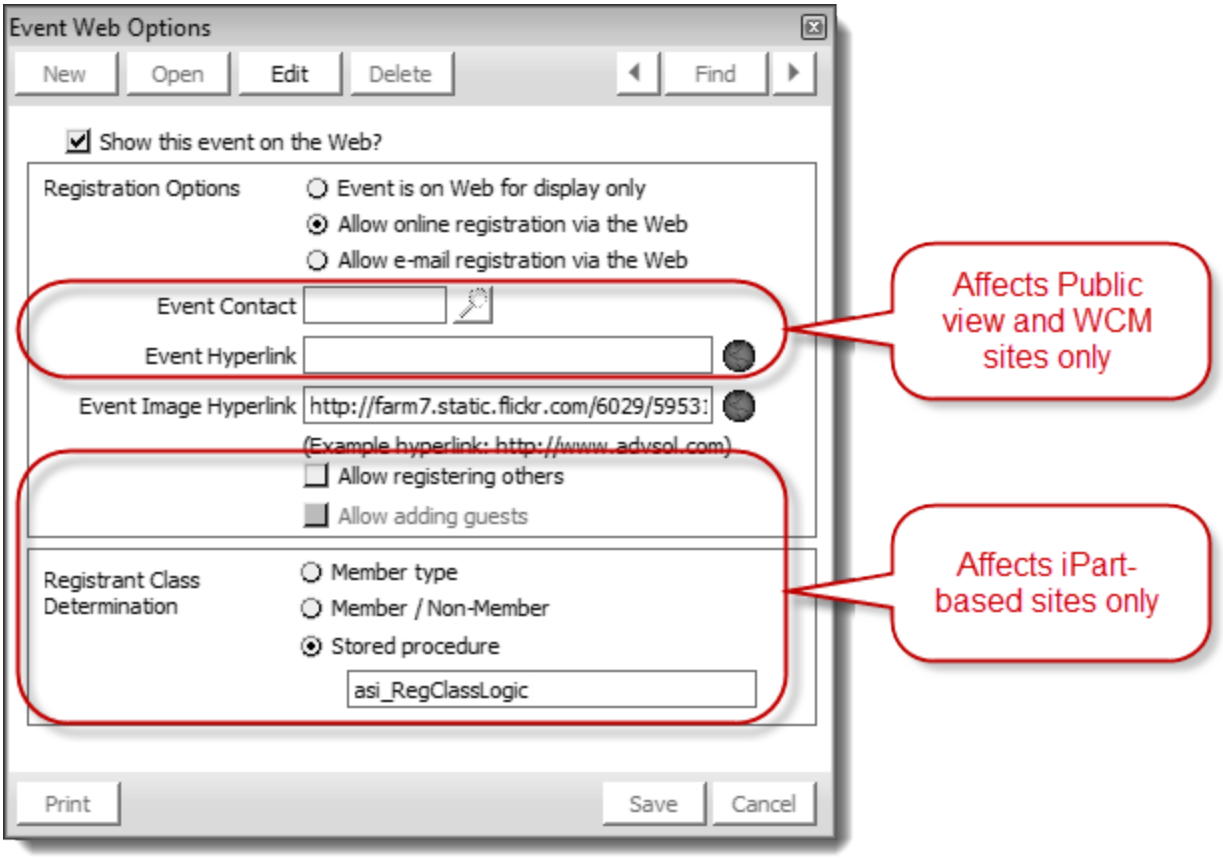
After reviewing the summary, you can edit the information by clicking the Previous button to go back to the previous tab. Click Next to save all the Event setup settings.

Configuring iPart-based event registration

> **Note:** Note: The options managed by the Web setup wizard for events do not affect iPart-based registration.

These are the key steps in Desktop for enabling web registration with iParts:

1. In Desktop, select Events > Define an event, and Edit the event.
2. Select More > Web Options to configure the event's appearance and behavior on the web.



3. On the Event Web Options window, enable event-level visibility: select Show this event on the Web?

   This option lets events appear in the search result of Search iParts, such as the Events List in the Member sample site.

> **Note:** Tip: If your event uses either of the Public view Registration Options that prevent online registration, your iPart-based site will disable the registration buttons and links but still allow the event to appear. You can use this feature to delay registration for an upcoming event while still allowing all details and pricing information to be viewable by your site visitors.

4. (optional) Add an image to display on the web: enter a link in the Event Image Hyperlink field:

- Full path: refer to an existing URL, such as http://example.com/myImage.jpg
- Relative path: Upload or select an image in Content Management > Manage images, and refer to it like this: /images/uploadedimages/myImage.jpg

  Tip: Image Manager lets you create subfolders, so you can group and organize images.

  This option lets the event's image appear throughout iParts and search results.

5. (optional) Enable Allow registering others, so that users can register others.

- (only available with Allow registering others) If you have an event for which this is appropriate, enable Allow adding guests.

6. Specify which Registrant Class Determination method to use for pricing your functions.

- Member type: Bases pricing on the registrant's member type; if the member type is not set or found or the price is undefined, iMIS uses the default pricing.
- Member/Non-Member: Bases pricing on the registrant's member status, using the configured price; if the member or non-member price is not found or the price is undefined, iMIS uses the default pricing.
- Stored Procedure: Bases pricing on the registrant class returned by a stored procedure. Such stored procedures let you implement complex pricing promotions, such as 50% off additional registrants from a given company. If iMIS cannot find the stored procedure specified or if it fails, default pricing applies.

Parameters - Your procedure must take one parameter but could take two. If your procedure takes one parameter, iMIS passes in the registrant ID only; if it takes two parameters, iMIS passes in the registrant ID and the event ID, in that order. Using both parameters lets you manage multiple events in the same procedure.

Your stored procedure must contain all logic needed (including the Use Parent Company Pricing rules) to return a registrant class. Here is a simple stored procedure that uses both parameters and returns a specific registrant class:

```
CREATE PROCEDURE [dbo].[asi_TestGetRegistrantClass]
  @RegistrantID varchar(10),
  @EventID varchar(10)
AS
BEGIN
  SELECT case @EventId when 'SPRCONF' then 'M' else 'NM' END
END
```

Here is simple code to test this stored procedure:

```
exec asi_TestGetRegistrantClass '146', 'SPRCONF'
```

7. Select Save to close the Event Web Options window.
8. (optional) Set a Maximum for the number of registrants for the event.

   When the registration maximum is reached, the Event display disables the Register button to prevent additional registrations. Be aware that simultaneous or bulk registrations (using Register Someone Else) could result in a few registrations being accepted beyond the maximum.

   Note: The Register button is disabled whenever the event is unavailable for the given user selected, whether for maximum reached or another constraint.
9. Unless the event itself is free, set one or more event-level pricing options: enable Is an Event Option on each function that you want to appear as a choice under Registration

Options. If you flag only one function with this option, it alone sets the event pricing (based on its Fees); if you flag several, the iPart displays a Registration Option panel, based on those functions and their fees:

Registration Options	Price
○ One Day Attendance	100.00
○ Two Day Attendance	250.00
○ Exhibit Only	50.00
◉ Full Conference	350.00

Because they have this special purpose, Is an Event Option functions do not appear in the Event Program Display listings.

Tip: You can set Maximum values on the functions that you use for your event's Registration Options and have those capacity limits selectively prevent registration as they fill up, option by option. For example, you can have the Conference fill up while still permitting registration to the Exhibition alone. When an option fills up (or if pricing is not yet defined), registrants must select another option.

10. Edit each function that you want to make available for web registration and do the following:

- Enable Show this function on the Web?

  Tip: You can disable Show this function on the web to keep your program item hidden until you are ready to accept registrations.

- Choose REG as the Type; other types will not be available for web registration.

- Verify the Fees that will apply, making sure to price all free functions as Comp (Complimentary). Enter only positive amounts for fees.

Important: If you leave a function fee at zero without enabling Comp., iMIS hides the program item or registration option from your customers, although non-Public users see it with “pricing undefined.” Hiding functions safeguards you from revenue loss that would occur if customers could register successfully when pricing is missing.

Tip: Function hiding lets you present different registration choices to different registrant classes. That is, if you keep *Default* pricing undefined, but add pricing for certain registrant classes (such as Company Members), you can offer a registration option that only Company Members can see and select.

- (optional) Add values to the Track and Category fields. Users will be able to sort functions by these values in the Event Program Display iPart.

  You can enter multiple tracks and categories to a function by entering semicolons between values; you can also leave some functions blank for these fields.

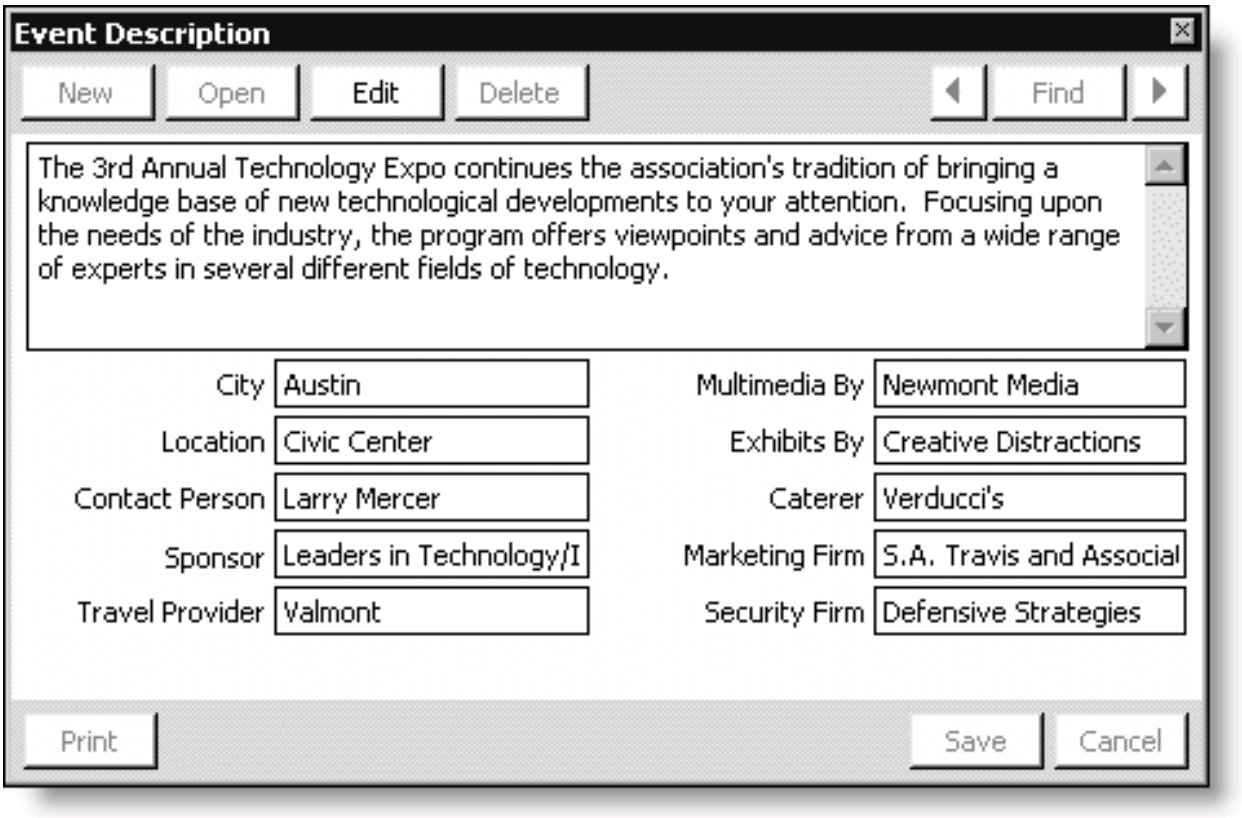
Entering event descriptions and addresses

Use the Event Description window to enter a description of the event.

Use the Event Address window to enter the address of the event, including directions.

Event Description window

The Event Description window enables you to enter a description (up to 1000 characters) of the event.



From Events, select Define an event, double-click an event, click More, and select Description

Description text box

By default, the Event Description window contains a text box for the event description. Your administrator may define additional fields for event information (see "Set up module window for Events").

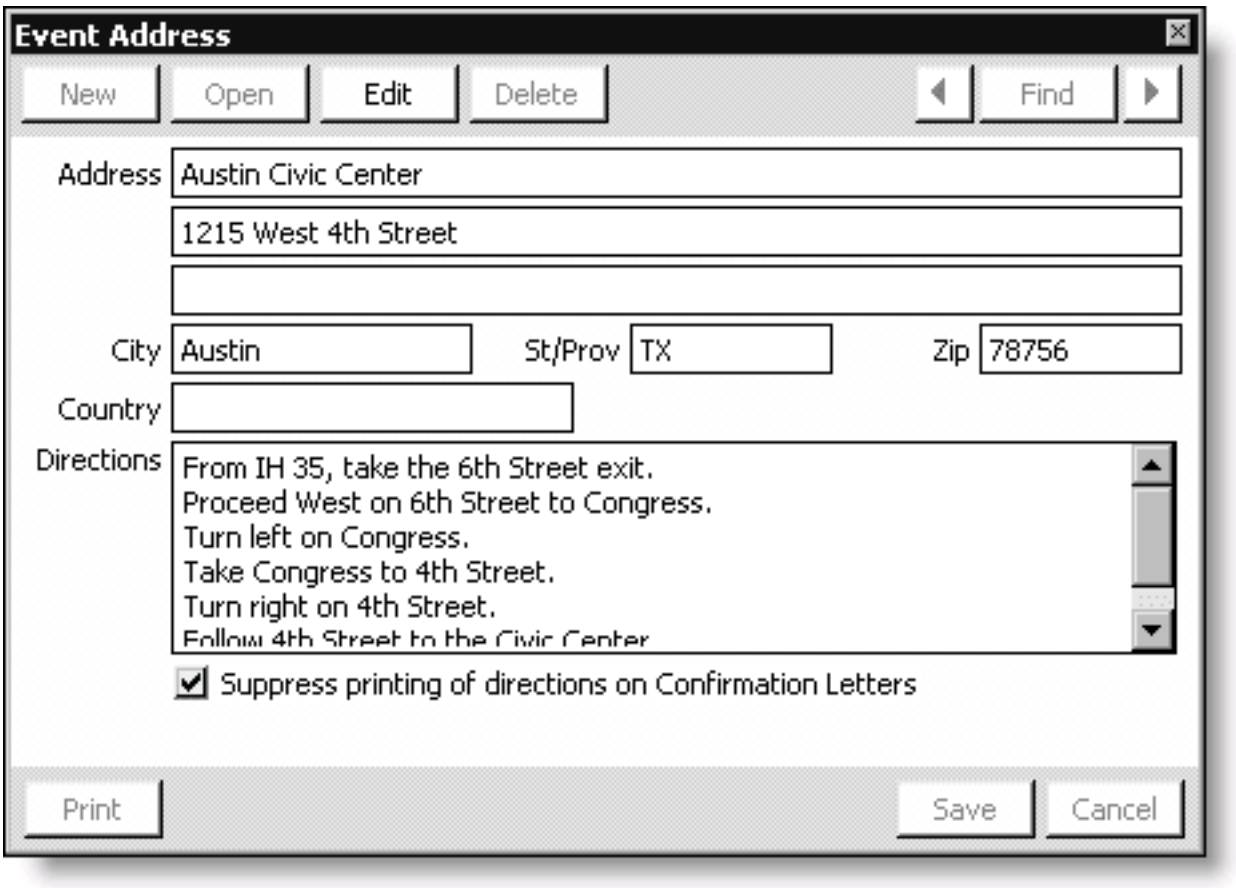
To enter event description information

1. Select Events > Define an event to open the Define an event window.
2. Double-click an event title to open it in the detailed Define an event window.
3. Click Edit.
4. Click More, and select Description to open the Event Description window.
5. Enter a description of the event.

Note: Your administrator may have configured the Event Description window to show more fields.

6. Click Save.

Event Address window



From Events, select Define an event, double-click an event, click More, and select Address

Address

Use these fields to enter the event's address (maximum field size of 50 alphanumeric characters).

City

Specifies the city where the event is being held (maximum field size of 40 alphanumeric characters).

St/Prov

Specifies the state or province where the event is being held (maximum field size of 15 alphanumeric characters).

Zip

Specifies the ZIP code where the event is being held (maximum field size of 10 numeric digits).

Country

Specifies the country where the event is being held (maximum field size of 20 alpha-numeric characters).

Directions

Specifies directions to the event (maximum field size of 256 alphanumeric characters).

Suppress printing of directions on Confirmation Letters

Enable if you do not want to print directions to the event on confirmation letters.

To enter an event's address

1. Select Events > Define an event to open the Define an event window.
2. Double-click an event title to open the detailed Define an event window.
3. Click More and select Address to open the Event Address window.
4. Click Edit.
5. Enter the address information for the event.

   Note: This information appears on default confirmation letters, and you can include it on other reports.
6. Check the Suppress printing of directions on Confirmation Letters check box if you do not want the directions to be printed on the confirmation letter.
7. Click Save.

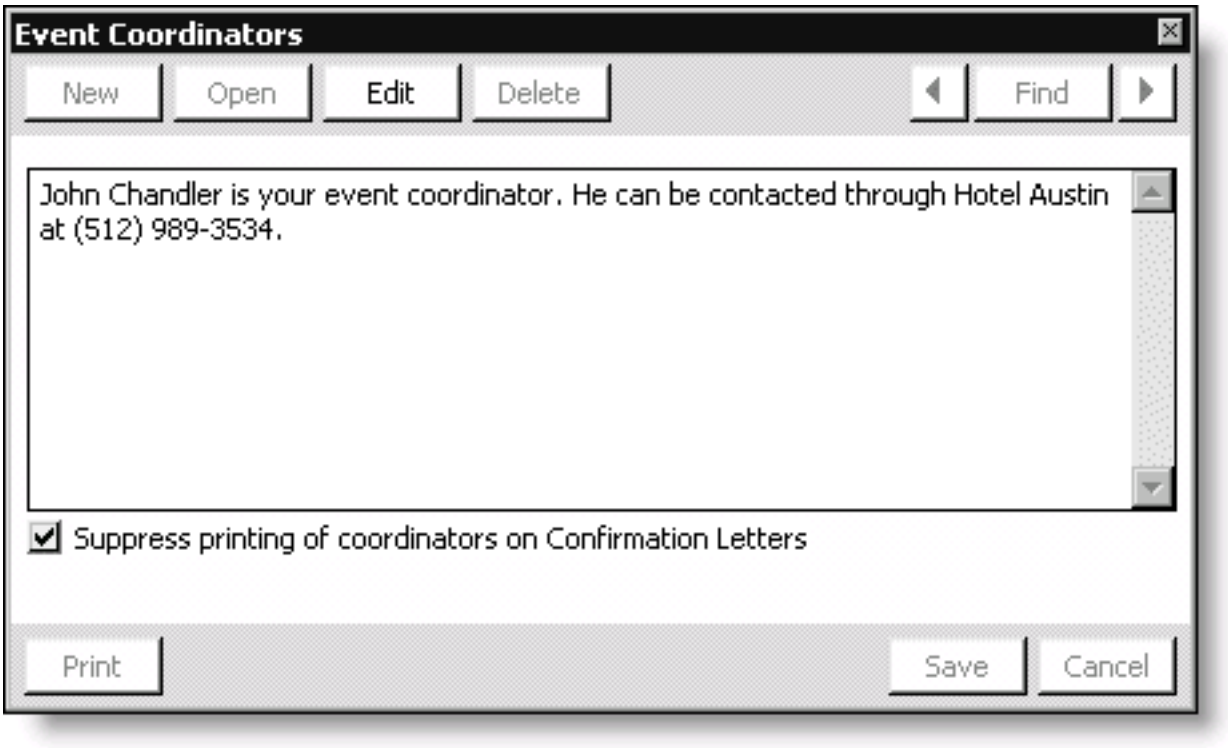
Entering event coordinators and notes

Use the Event Coordinators window to enter a list or description of the event coordinators.

Use the Event Notes window to enter additional information about an event.

Event Coordinators window

You can enter a list or description of the event coordinators on the Event Coordinators window.



From Events, select Define an event, double-click an event, click More, and select Coordinators

Coordinators

Specifies a description of the event coordinators (maximum field size of 256 alpha-numeric characters).

Suppress printing of coordinators on Confirmation Letters

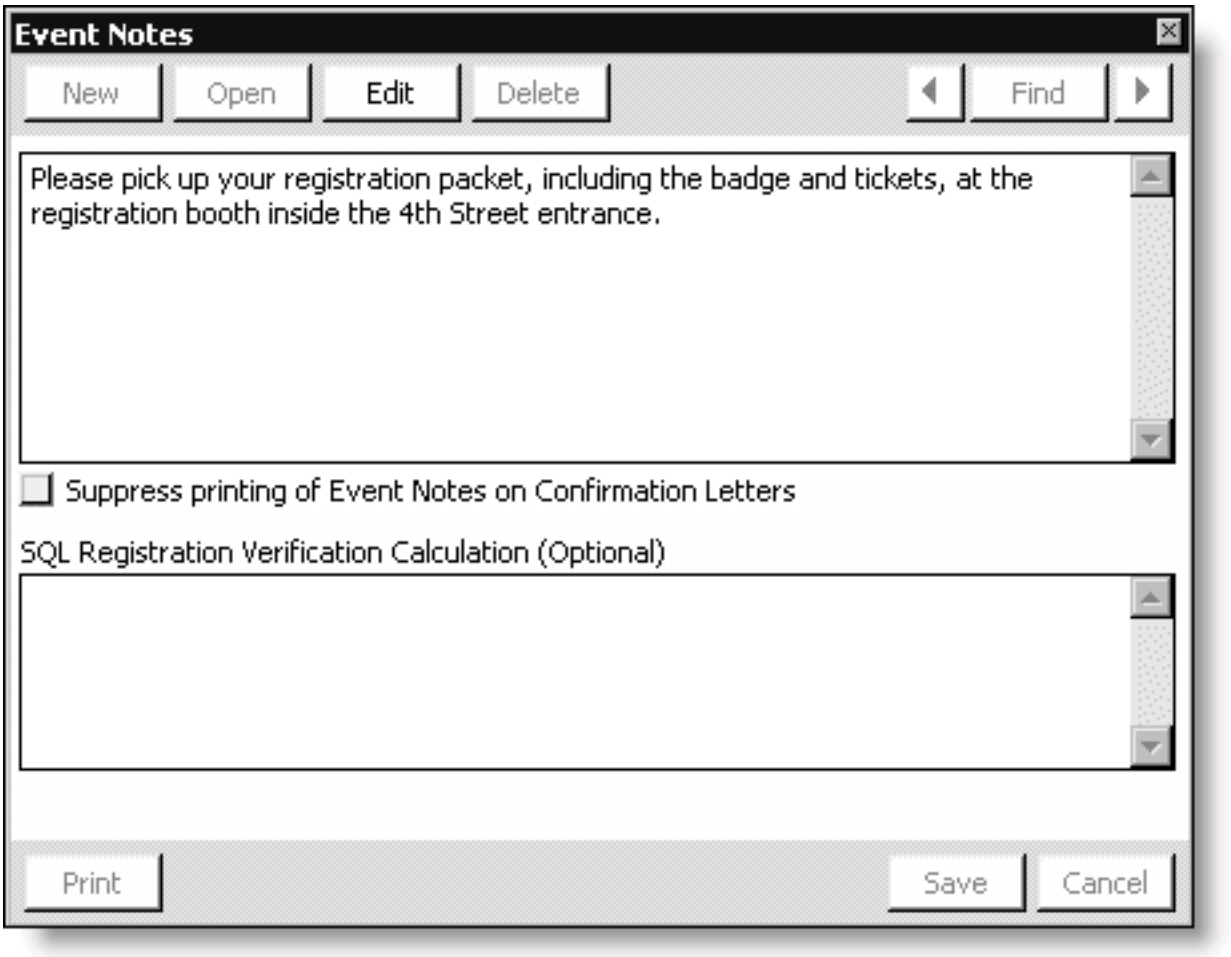
Enable if you do not want to print event coordinator information on confirmation letters.

To enter event coordinator information

1. Select Events > Define an event to open the Define an event window
2. Double-click an event title to open the detailed Define an event window.
3. Click More and select Coordinators to open the Event Coordinators window.
4. Click Edit.
5. Enter the event coordinator information.

   Note: This information appears on default confirmation letters, and you can include it on other reports.
6. (optional) Check the Suppress printing of coordinators on Confirmation Letters check box if you do not want coordinator information printed on confirmation letters.
7. Click Save.

Event Notes window



From Events, select Define an event, double-click an event, click More, and select Notes

Notes

Specifies any applicable event notes (maximum of 256 alphanumeric characters).

Suppress printing of Event Notes on Confirmation Letters

Enable if you do not want to print event notes on confirmation letters.

SQL Registration Verification Calculation (optional)

Specifies a SQL calculation. When you enter a SQL calculation, registrants who try to place an order and do not meet the required criteria defined in the calculation cannot sign up for the event.

To enter event notes

The Event Notes window enables you to enter additional information about an event.

1. Select Events > Define an event to open the Define an Event window.
2. Double-click an event title to open the detailed Define an event window.
3. Click More and select Notes to open the Event Notes window.
4. Click Edit.
5. Enter any applicable event notes. A maximum of 1,000 alphanumeric characters can be entered.
6. (optional) Enable the Suppress printing of Event Notes on Confirmation Letters option so that the event notes do not print on the confirmation letter.
7. Click Save.

To enter a SQL verification calculation

If you enter a SQL Registration Verification Calculation, iMIS tests a registrant's eligibility based on the requirements defined in the calculation. The SQL calculation results in either a 1 or a 0. If the result is a 1, then iMIS enables you to create an order for the registrant. If the result is a 0, then a message is displayed indicating that the registrant is not eligible, and the registration is canceled.

1. From Events, select Define an event, double-click an event, click More, and select Notes to open the Event Notes window.
2. Click Edit.
3. Enter a verification calculation in the SQL Registration Verification Calculation (optional) field.

   The following is a sample calculation (the calculation varies from organization to organization). The sample calculation searches for all CM (company member) types, and, if the registrant is not a CM, iMIS displays a message indicating that the registration cannot be processed.

select COUNT(*) from Name where MEMBER_TYPE='CM' and ID = [AsiSQL(Orders.ST_ID)]

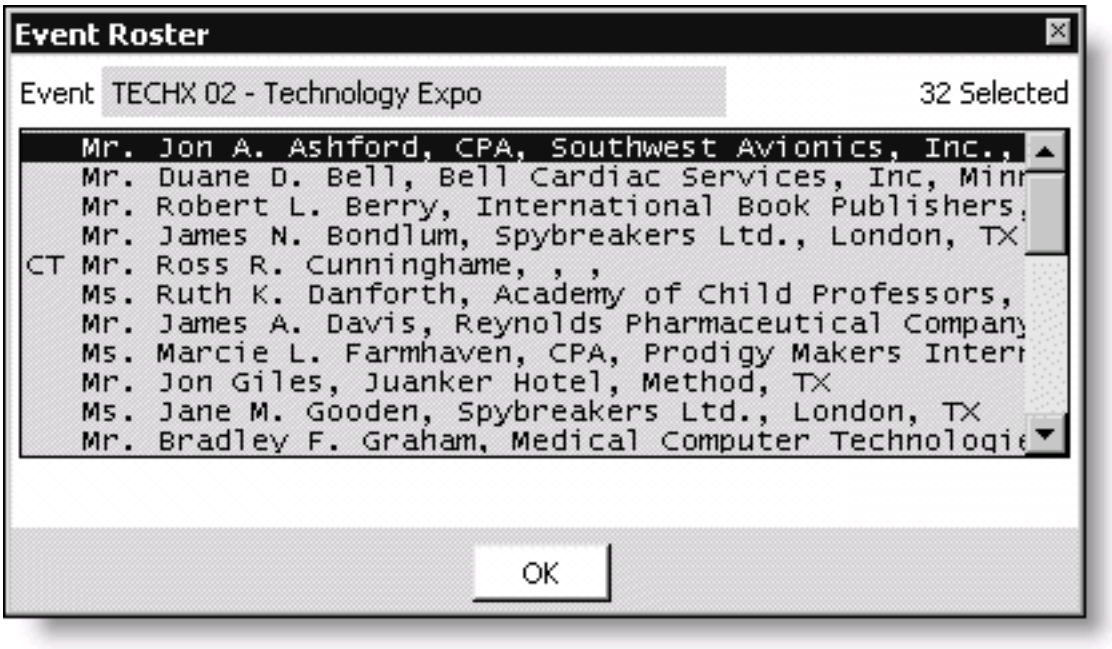
4. Click Save.
5. Restart iMIS.

Viewing the event roster

Use the Event Roster window to view a list of event registrants.

To view a roster

1. From Events, select Define an event, double-click an event, click More, and select Roster to open the Event Roster window.
2. The letter C in the first column designates a canceled registration. CT in the first column designates a transferred registration.



Example of the Event Roster window

Closing an event

You must close an event before event MEETING and MEETFUNC activity records can be created. When closing a completed event, a registrant's order data is replaced with an

event MEETING activity record.

If the Create Detail Activity checkbox is selected on the Event Function Detail window for a specific function, a MEETFUNC activity record will be created for this function when the event is closed. You can tell at a glance which event functions have this checkbox selected by looking at the function list in the Define an Event - event details window. The Activity column specifies YES if the checkbox is selected.

> **Note:** Note: You must ensure that you have selected the Create Detail Activity checkbox for the desired functions before you close the event.

If the Delete Event Definition on Close option is enabled on the Event System Preferences window the definition and planning records for the event are purged when you close the event. If this option is disabled, the event and product planning information remains in iMIS, the event detail is purged, and a C appears in the Status field to indicate that the event has been closed.

You can close an event any time after completing all event registrations. Open receivables are tracked in AR/Cash for any outstanding balances.

> **Note:** Note: If you are licensed for CEU and tracking continuing education units for one or more functions within the event that you are closing, you must update the attendance for those functions before closing the event. If an individual is marked as a no-show, you must remove that individual from the function to avoid creating a MEETFUNC activity record for the no-show.

To close an event

1. Select Events > Define an event to open the Define an event window.
2. Double-click a completed event to open it in the detailed Define an event window.
3. Review the Activity column in the function list to ensure that a value of YES is displayed for every function for which you want MEETFUNC activity records created when you close the event.

To change an Activity value to YES, edit the function and select the Create Detail Activity checkbox in the Event Function Detail window.

4. Click More and select Close Current Meetings.

   If the system finds current registrants, a message is displayed stating that the event has current registrants.

5. Click Yes.

   A system message prompts you to verify closing the event.

6. Click Yes.

   A message is displayed notifying you that all event details will be removed and that activity history will be generated for all of the registrants.

7. Click Yes to close the event.

Canceling an event

When you cancel an event, iMIS automatically reverses the accounting entries that were created during order processing. The income accounts are debited and AR/Cash is credited. All open receivable balances for unpaid orders are closed (brought to zero balance). For registrants who have already paid, the reversed entry results in open credits. Open credits can be refunded or can be applied to other orders or event registrations.

If you enable the Delete Event Definition on Close option on the Event System Preferences window the event definition is deleted when you cancel the event. If the option is not enabled, the event you are canceling appears on the list of events on the Define an event window with a status of X.

Canceling an event, unlike canceling a registration, is irreversible. All registration details are always deleted after an event is canceled.

To cancel an event

1. Select Events > Define an event to open the Define an event window.

2. Double-click the event you want to cancel to open it in the detailed Define an event window.
3. Click More and select Cancel Current Meeting.

- If the system finds current registrants, a message prompts you to verify the cancellation of the event.

  Click Yes if you receive this message.

  A system message prompts you to verify canceling the event.

4. Click Yes.

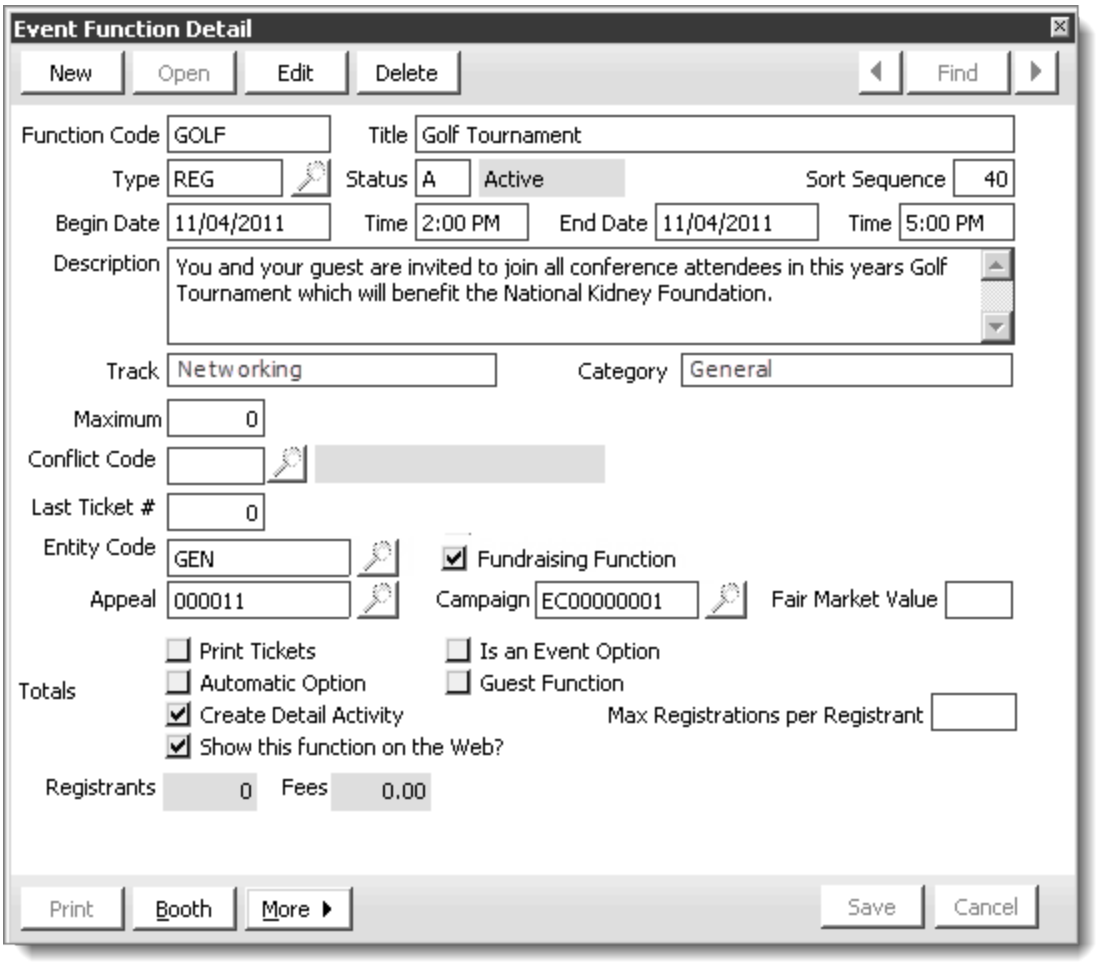
   A message prompts you to verify canceling the event because the action is not reversible.

5. Click Yes to cancel the event.

Event Function Definition

Many of the details you define about an event, both required and optional, are maintained at the individual function level. An event function definition includes a general description of the function, the location and schedule, the registration fee information including account and fundraising data, and optional room setup and planning details.

Event Function Detail window



From Events, select Define an event, double-click an event, select an event function, and click Edit

Function Code

Designates a unique code for the event function. You can use a combination of letters and/or numbers to represent the function (do not use spaces, apostrophes, quotation marks, forward slash (/), or dashes).

Title

Specifies a title for the event function. The title appears on all lists and reports that show individual event functions, such as confirmation letters, tickets, and detailed rosters. Maximum size: 60 characters.

Type

Specifies the event function type. The field defaults to REG for normal registrations. Use the lookup icon to find a function type.

- REG - This type is used for regular event registrations. It is displayed on the registration window, confirmations, and invoices.
- MEMO - This type is used when the function type should not be displayed on the registration window or be printed on invoices or confirmations. Tickets may be printed if this function is linked to a REG function.
- EX (iMIS Exhibition Management only) - This type is used for booth functions when processing exhibitor orders within the Exhibition Management system.

Status

Specifies an event function status code:

- A - Active (available for registration - default)
- P - Pending (still in planning stage)
- F - Frozen (currently unavailable for active registration, due to events such as registration currently occurring at the site)
- C - Closed (registrations no longer accepted)
- X - Canceled

Sort Sequence

This field specifies the sort sequence of functions that have the same start date and time (the first two sort criteria).

When used, this third-level sort function places functions with lower values ahead of those with higher ones: 1 sorts ahead of value 2, which sorts ahead of 3.

Note: Note: Functions display by starting date, starting time, and sort sequence on the Define an event window and, initially, on the Register a customer window. If

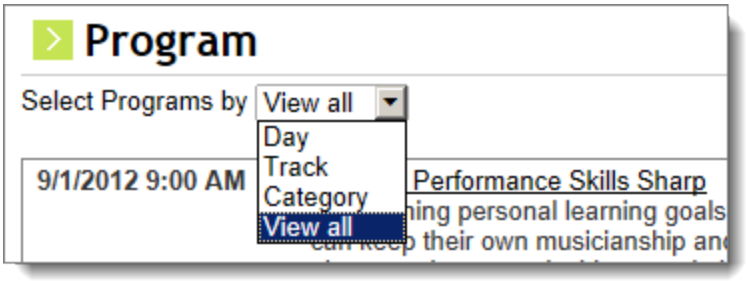
> you later add functions for an existing registrant, those new functions will appear at the bottom of the list on displays and reports.

Begin Date

Specifies the beginning calendar date of the event function. If the function spans more than one day, enter the beginning date.

Track

(iParts only) Designates one or more terms, separated by semicolons, as being relevant tracks for this function. For example, if the function serves both managers and technologists, you might enter Management;Technical. You may leave this blank for some or all of your functions.



Track and Category entries allow registrants to view and collapse (hide) those groupings in the Event Program Display.

Category

(iParts only) Designates one or more terms, separated by semicolons, as being relevant categories for this function. For example, if the function targets both intermediate and advanced practitioners, you might enter Intermediate;Advanced. You may leave this blank for some or all of your functions.

Maximum

Specifies the total number of attendees for this function (for example, due to space limitations).

Taxable

(VAT taxation enabled) Designates that the function fees are taxable under VAT.

Tax Code

(VAT taxation enabled and Taxable enabled) Specifies the VAT tax code for this function's fee.

GST/HST

(Canadian taxation enabled) Specifies that the function fee is subject to General or Harmonized Sales Tax.

PST

(Canadian taxation enabled) Specifies that the function fee is subject to Provincial Sales Tax

Conflict Code

Designates an optional code used to label time slots or content areas to prevent scheduling conflicts. Registering for conflicting event functions will produce a warning message. Your administrator can set up conflict codes using a lookup/validation table.

Last Ticket

Specifies the number of the last ticket printed for this function, which is zero (blank) until tickets are printed.

Fair Market Value

Specifies the fair market value for the function if there is one.

Print Tickets

Specifies that tickets should be printed for this function.

Automatic Option

(optional) Specifies that new registrants will be registered for the function automatically.

Create Detail Activity

(optional) Specifies that a MEETFUNC activity record will be created for this function when the event is closed. The activity record is listed in the Activities-All tab in the history area of the Manage Customers window. The activity record is created only for the function registrants who are listed in the Event Roster window at the time the event is closed.

Is an Event Option

(iParts only) Specifies that the function appears as the event's overall registration option or, if you designate additional, as one of several Registration Options that registrants can choose from. iMIS prevents registration for the function until you define its pricing.

Limiting numbers of registrations: Enabling this along with a Maximum value, you can set capacity restrictions on the functions that you use for your event's Registration Options and have those capacities selectively prevent registration as they fill up, option by option. For example, you can have the Conference Workshops fill up while still permitting registration to the Conference itself. When the number of registrations for a specific Registration Option is met (or if pricing is not yet defined), users cannot register for that registration option, and they are prompted to select another option.

Guest Function

(optional) Specifies that the function allows guest registration. If this option and the Show this function on the Web option are enabled, the function will not show as a separate function on the web. Instead, it will show up as a guest type.

Show this function on the Web

Unused.

Max Registrations per Registrant

Unused.

Totals

- Registrants - Displays the total number of registrants for the given function. Canceled and canceled/transferred registrants are not included in these numbers.
- Fees - Displays the total of fees for current registrants for this function.

Booth

(Displayed when licensed for Exhibition) Opens the Booths window that enables you to generate a group of booths, add an individual booth, remove a booth, and import booths. See Exhibition Management for more information.

More

Displays the following drop-down menu items:

- Fees - Opens the Event Function Definition - Fees window.
- Plan - Opens the Event Function Definition - Plan window.
- CEU - Opens the Event Function Definition - CEU window. See Tracking Credits for Continuing Education for more.
- Speakers - Opens the Event Function Definition - Speakers window.
- Staff - Opens the Event Function Definition - Staff window.
- Links - Opens the Function Links window.
- Roster - Opens the Function Roster window.

To define event functions

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event (detail) window.
3. Click Insert to open the Event Function Detail window.
4. Enter a unique Function Code using any combination of letters and/or numbers.
5. Enter a Title (function name) of up to 60 characters. The title you enter here appears on reports that show individual products, such as confirmation letters and detailed rosters.

   Note: The function Type defaults to REG, and the Status defaults to A.
6. In the Type field, accept the REG default, or select the lookup icon to select a value.
7. In the Status field, accept the A default, or select the lookup icon to select a value.

8. (optional) Enter a numeric Sort Sequence.
9. (optional) Enter a Begin Date for the function.
10. (optional) Enter a beginning Time for the function.
11. (optional) Enter an End Date for the function.
12. (optional) Enter an ending Time for the function.
13. (optional) Enter a Description.
14. (optional) Enter a Maximum number of registrants.
15. (optional) Enter a Conflict Code, or if conflict codes have been defined, select the lookup icon to search for a code.

    Note: You can set up Conflict Code validation by editing the CONFLICT_CODE table (from Customers, select Set up tables > General lookup/validation, and edit or create the table named CONFLICT_CODE).
16. (optional) Enter the Last Ticket #. If printing tickets for the function, enter a specific start number, or accept the 0 default.
17. Check the Fundraising Function checkbox. The Fundraising specific fields (Appeal, Campaign, and Fair Market Value) appear, and the Entity Code field changes to the Fund field.

    Note: The Fund field is restricted to codes that are marked "Is Fund" in iMIS setup. Entity Code can contain any Org Code defined in iMIS setup.
18. Fill in the following fundraising information (all fields are optional):

- Fund
- Appeal
- Campaign
- Fair Market Value

19. (optional) Select Print Tickets if you want to generate tickets for this function.
20. (optional) Select Automatic Option if you want new registrants to be registered for the function automatically.
21. (optional) Select Create Detail Activity if you want MEETFUNC activity records to be created for the registrants for this function at the time the event is closed.
22. Click Save.

Using the Event Function Detail window and its child windows

Some tips for entering data to the Events Function Detail window and its child windows will help you enter your data more efficiency.

- If the Event Function Detail window is in insert or edit mode, you cannot select a new function from the Define an Event window. You must cancel or save first.
- If the Event Function Detail window and any of its child windows are open, but not in edit mode, you can click on the Define an event window and select another function. If you select a new function, you can enter data to the Event Function Detail window and its child windows listed under More.
- When the Event Function Detail window is in insert or edit mode, all of its child windows are also in insert and edit mode. A save in one window will save data in all windows.
- An exception is, if the Function Links window is open, the user cannot click behind it to access the Function Detail window, a child window, or the function list on Define an Event window.

Using the Booths window and its child windows

Some tips for entering data to the Booths window and its child windows will help you enter your data more efficiency.

- If the Booth window is open, you can click on child windows and select another function. The Booth window will refresh and display the booths for the newly-selected function.
- If the Function Detail window or any of its child windows is in insert/edit mode, then the

Booth window is not in edit mode, and vice versa. If the Booth Generator or the Add an Individual Booth dialog boxes are open, other windows are disabled.

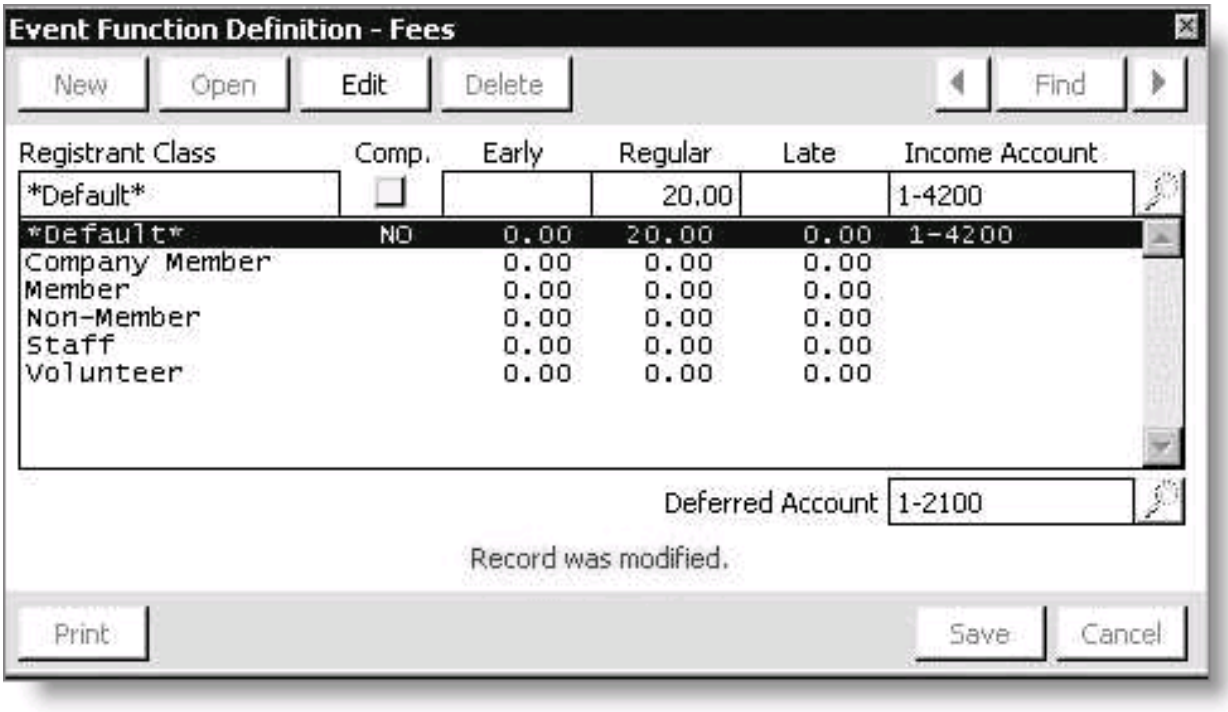
Setting fees

Registration fees may be based on the registration date (early, regular, and late), the registrant class (member or non-member), or a combination of registration date and registrant class.

You also can choose to charge all of your registrants the same price, regardless of registrant class or registration date by defining a default regular price.

The Event Function Definition - Fees window displays a list of each registrant class and one labeled *Default*. These lines are where you enter the various fees for this function and the General Ledger accounts to which the fees apply. You must supply information on the Event Function Definition -- Fees window for each function, even if you only enable the Comp option and no fees apply.

Event Function Definition - Fees window



From Events, select Define an event, enter or open an event, enter or open an event function, and select More > Fees

Registrant Class

Displays the registrant class selected from the list below the field. You have the option of charging different registration fees for different registration classes. If the Default registrant class is selected, all registrant classes will be charged the same registration fees.

Comp

Designates functions which are complimentary (free of charge) for one or more registrant class.

Early

Specifies the fee charged when a registrant places an order on or before the established Early Cutoff date as defined on the Define an event window.

Regular

Specifies the fee charged when a registrant places an order after the Early Cutoff date but on or before the Reg Cutoff date.

Late

Specifies the fee charged when a registrant places an order after the established Reg Cutoff date as defined on the Define an event window.

Income Account

Specifies the general ledger account number assigned to the function for this specific registrant class.

Deferred Account

Specifies the general ledger number that records the fee until it is transferred to earned income. (This field is visible only if you are licensed for Deferred Income)

To define event function fees and GL information

> **Note:** Note: Although this procedure describes assigning a flat fee for all registrant classes and all registration dates, you can assign different fees for different registrant classes and registration dates.

1. Define an event.
2. Define an event function.
3. On the Event Function Detail window, click More and select Fees from the drop-down list.

   The Event Function Definition - Fees window opens.
4. Click Edit.
5. Choose a registrant class or the *Default* class.
6. Enter the amount for the Early, Regular, and Late fees or check the Comp box if you will not charge members of this registrant class a fee for this function.
7. (optional) Enter the general ledger account number where the income should be credited in the Income Account field, or click the lookup icon to select an account.

   Note: If you are using a General Ledger interface, you must assign a GL account number to all fees other than complimentary.
8. (optional) Enter the deferred income account in the Deferred Account field, or click the lookup icon to select an account.
9. Click Save.

Fee structure scenarios

Just as event definitions vary from simple to complex, so do the fee and accounting structures. You can choose from:

- No fees charged
- Single fee and income account
- Early and regular fees for all classes

- Multiple fees and income accounts by class
- Multiple fees by class, single income account
- Single fee and multiple income accounts by class
- Multiple fees for some classes, single fees for others
- Some functions with fees by class, some with fees for all

Use the Event Function Definition - Fee window to set up these structures.

No Fees Charged

1. Define a single event function through the Event Function Detail window so that you can process registrations for the event.
2. To speed registration, enable the Automatic Option.
3. Because no fees apply to any registrant class, enable the Comp option for the Default registrant class.
4. No accounting information is involved, so leave the Income Account blank.
5. Click Save.

Single Fee and Income Account

1. Define a single event function through the Event Function Detail window so that you can process registrations for the event.
2. To speed registration, enable the Automatic Option.
3. Enter a single fee amount in the Regular field for the Default registrant class.
4. Enter the single General Ledger account number for the Default registrant class if you are using the iMIS General Ledger (G/L) interface or want to track and report on the accounting entries.
5. Click Save.

Early and Regular Fees for All Classes

Assume you are offering early rates to encourage people to mail in their registrations. You lower the fee from the regular $55 to $45 for all registrations received on or before May 15, but you still only have one class of registrant. Use this function/fee setup:

1. Define a single function to record registrations.
2. To speed registration, enable the Automatic Option.
3. Enter 45 in the Early column and 55 in the Regular column. Enter the 5/15 date in the Early Cutoff field on the Define an event window.
4. Enter the single General Ledger account number for the Default registrant class if you are using iMIS General Ledger (G/L) interface or want to track and report on the accounting entries.
5. Click Save.

Multiple Fees and Income Accounts by Class

Assume you are charging different rates for a single event based on the membership status (class) of the registrant. You have separate income accounts for recording the fees, and early and regular fees are $75 and $90 for customers, and $125 and $150 for nonmembers. Follow these steps to define the fees:

1. Define a single function to record registrations.
2. To speed registration, enable the Automatic Option.
3. Because the fees vary according to status and class, skip the Default registrant class; instead, enter fees of $75 and $90 in the Early and Regular columns for the Member registrant class and $125 and $150 in the Early and Regular columns for the Nonmember registrant class.
4. If you have more groups to register (such as speakers or staff), either record their fee information in their class lines or as a whole in the *Default* line.
5. If you are tracking the income accounts, enter them separately on the Member and Non-

member lines, respectively.

6. Click Save.

Multiple Fees by Class, Single Income Account

This setup is similar to the scenario above except there is only one income account, rather than several, for recording the fees. To set up these fees:

1. You still must enter the different fee amounts on each Registrant Class line.
2. Although you could enter the same account for both the Member and Nonmember registrant classes, you simply can enter the single account for the Default registrant class.
3. Click Save.

Single Fee and Multiple Income Accounts by Class

This is an uncommon situation, but you can set up such a scenario. You can process identical fees in separate income accounts based on registrant class by following these steps:

1. The same fee structure (early, regular, and late) applies to all registrant classes. Record the fees for each registrant class instead of the Default registrant class.
2. Record the different income account numbers for each registrant class instead of the Default registrant class.
3. Click Save.

Multiple Fees for Some Classes, Single Fees for Others

In this scenario, you will set member and nonmember fees separately as before. However, you also are providing complimentary (free) registrations for speakers, exhibitors, and staff customers. To set up this fee structure:

1. Enter the fee for the Default registrant class because all nonstandard registrant classes are assigned the same fee.
2. Record the different fee amounts for the Member and Nonmember registrant classes.
3. Although you could mark Comp for each remaining registrant class, you also can enable

it for the Default registrant class.

4. Click Save.

Some Functions with Fees by Class, Some with Fees for All

In this situation, you need to set up a conference in which some functions, such as the registration, require that fees vary by class and date, but other functions have a single fee or none at all. While this sounds complex, the setup is simple:

- For each function, record variable fee amounts for each registrant class;
  or
- Edit the Default registrant class by enabling the Comp option or entering a fixed amount.

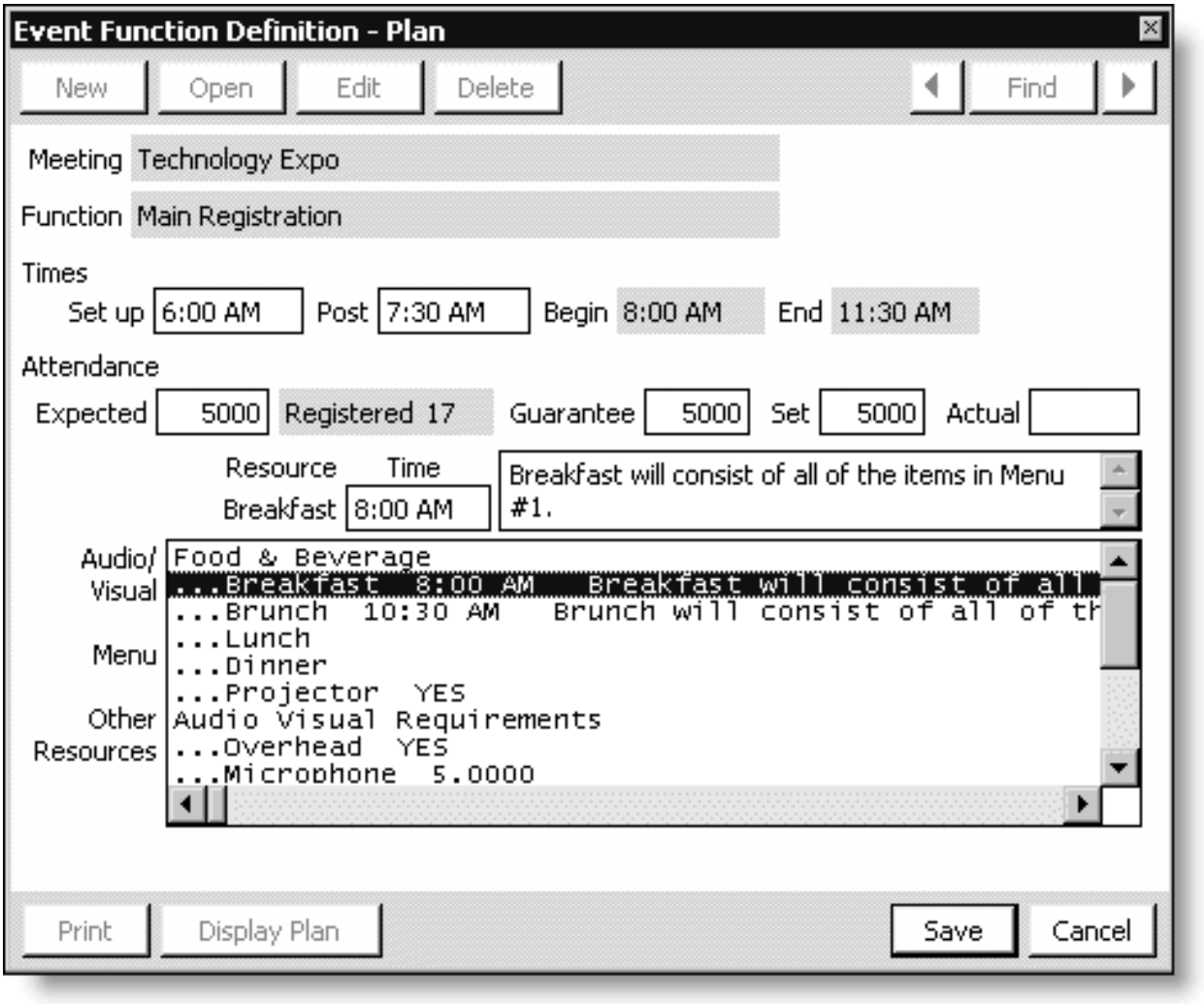
Function planning

iMIS enables you to plan each function to the smallest detail, including information on food and beverages, equipment, room arrangements, and notes. This information is important for internal usage and for communicating your plans to hotels and conference centers. Detailed plans may be printed and sent to hotel staff or other personnel in charge of planning and arranging event function facilities.

The Event Function Definition - Plan window is used for:

- Room planning and setup information, including scheduling
- Expected attendance and related figures
- Notes about required resources

Event Function Definition - Plan window



From Events, select Define an event, double-click an event, double-click an event function, click More, and select Plan

Meeting

Displays the event Title defined on the Define an event window.

Function

Displays the event function Title defined on the Event Function Detail window.

Times

- Set up - Specifies the time for room setup to begin. The format for entering time is [hour] (space) [minutes] (space) [pm]. For example, 7:15 a.m. would be entered as 7 15 (because the default is a.m.) and 2:00 p.m. would be entered as 2 pm..
- Post - Specifies the time for room setup to be completed.
- Begin - (read only) Displays the event function Begin Time from the Event Function Detail window.
- End - (read only) Displays the event function End Time from the Event Function Detail window.

Attendance

- Expected - Specifies the number of registrants expected to attend the function.
- Registered - (read only) Displays the total number of function registrants from the Event Function Detail window.
- Guarantee - Specifies the total number of attendees you guarantee will attend the function.
- Set - Specifies the total number of attendees for which the room should be set or arranged.
- Actual - After the function is complete, Specifies the actual number of attendees.

Resource

- Title - (read only) Displays the resource's title when a resource is selected from the Resource list.
- Qty - (Displays only if enabled for the resource in the Set up event resources window (from Events, select Set up tables > Event resources)) Specifies the number of the selected resources needed.
- Time - (Displays only if enabled for the resource in the Set up event resources window) Specifies the time the resource will be needed.

- Check Box - (Displays only if enabled for the resource in the Set up event resources window) Enable to indicate that a projector will be needed for the function.
- ID - (Displays only if enabled for the resource in the Set up event resources window) Displays the resource ID number.
- Text - (Displays only if enabled for the resource in the Set up event resources window) Specifies any applicable note for the resource.

  Resources

  Lists the resources defined in the Set up event resources window.

  Display Plan button

  Used to display the Room Setup Report.

  To define a plan

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit to open the Event Function Detail window.
4. Click More, and select Plan to open the Event Function Definition - Plan window.
5. Enter the Set up and Post times.
6. Enter the Expected number of attendees.
7. (optional) Enter the number of attendees you want to Guarantee.
8. (optional) Enter the Set number of attendees for which the room should be set up or arranged.
9. Select the resource items, and the prompts enabled for the resource in the Set up event resources window will display.
10. Define the details for each resource item. For example, enter a Time for breakfast to be set up or served and any additional information in the Text field.

11. Click Save.
12. Select Display Plan to display the Room Setup Report on the screen:

Room Setup Report as of April 5th, 2002

Page 1

Advanced Solutions International, Inc.

Meeting: *Technology Expo* — *Austin, TX*

Function: *Main Registration* — *12/02/2002 8:00 AM* / *December 2nd, 2002*

Times

Set-Up 6:00 AM | Post 7:30 AM | Begin 8:00 AM | End 11:30 AM

Attendance

Expect 5,000 | Registered 17 | Guarantee 5,000 | Set 5,000 | Actual 0

Food & Beverage

Breakfast 8:00 AM	Breakfast will consist of all of the items in Menu #1.
Brunch 10:30 AM	Brunch will consist of all of the items in Menu #2.

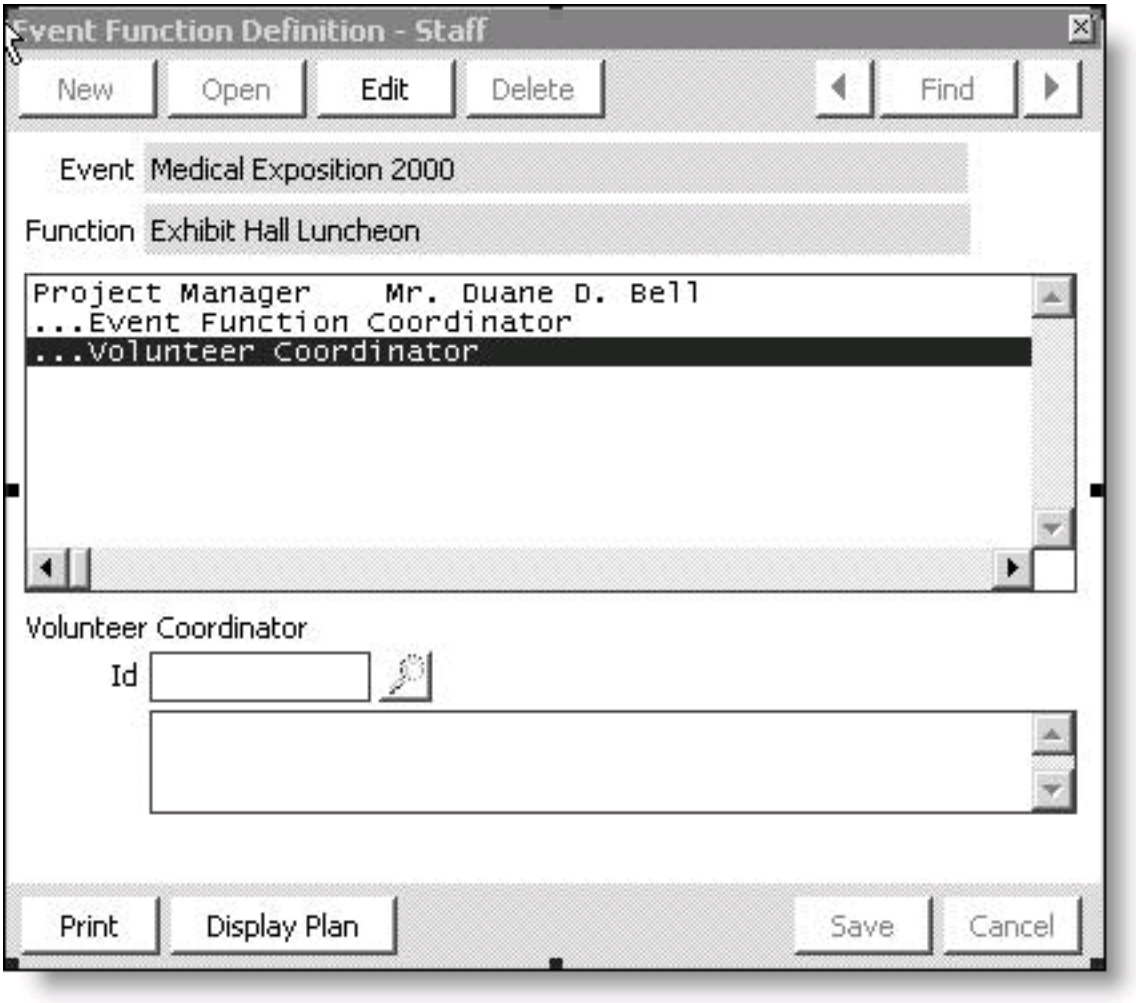
Example of the Room Setup Report

View and assign event function staff

Use the Event Function Definition - Staff window to:

- View all event staff roles as defined by your organization using Events > Set up tables > Event Resources
- View any staff members that have been assigned roles for an event function
- Assign staff to an event function
- Run a report containing basic details about the event function, staff members assigned to the event function, and each staff member's role for that event function

Event Function Definition - Staff window



From Events, select Define an event, double-click an event, double-click an event function, click More, and select Staff

To view staff assigned to an event function

1. Go to Events.
2. Select Define an event.
3. From the list of events, double-click the event you want to open.
4. From the list of event functions at the bottom, double-click the function to be staffed.
5. On the Event Function Detail window, select More > Staff.

To assign staff to an event function

1. Go to the Event Function Definition - Staff window.
2. Select Edit.
3. Select a staff role from the list. Once a role is highlighted, the Id field appears at the bottom of the window.

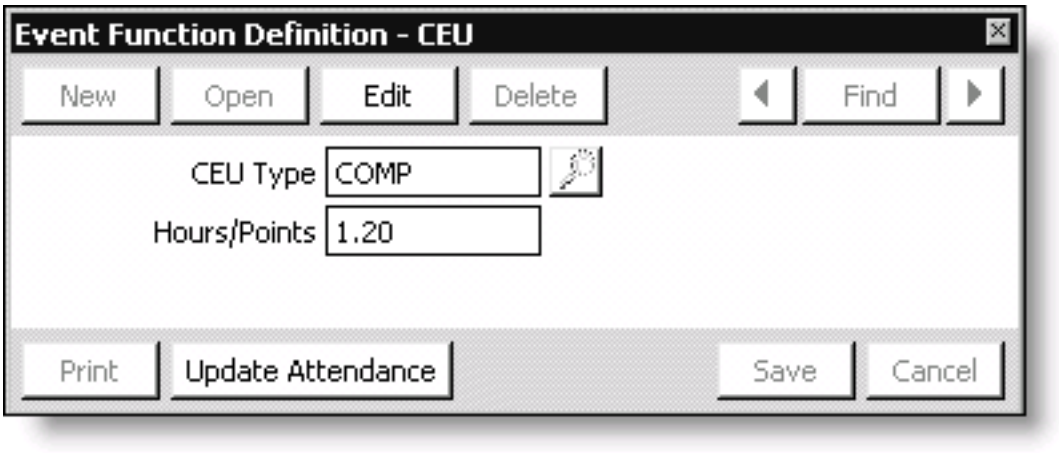
   Note: If the Id field does not appear, return to the Set up tables > Event Resources window, select the staff role you wish to assign, and make sure that Id has been selected in the Field 1 Usage option.
4. Enter the ID in the Id field, or use Find to locate the individual: select the QuickLook button to the right of the Id field. When you locate the staff member, double-click the name to assign it to the event function.
5. Select Save.
6. Close the Event Function Definition - Staff window.

Tracking credits for continuing education

If your system is licensed for iMIS Continuing Education (CEU), you can track the education credits awarded to function attendees. Because CEU data is managed at the function level, you can easily track multiple functions that offer different awards and credits during a single event.

Event Function Definition - CEU window

The Event Function Definition - CEU window enables you to record education credits to be awarded to function attendees. Because CEU data is managed at the function level, you easily can track multiple functions for the same event.



From Events, select Define an event, double-click an event, double-click an event function, click More, and select CEU

> **Note:** Note: You can access the Event Function Definition - CEU window only if the CEU Name field is populated on the Customer Setup - Advanced window. The entry in the CEU Name field is shown on the Event Function Detail window's More menu.

CEU Type

Designates the continuing education category of the course. Valid codes are defined in a lookup table according to the following rules:

If you are not licensed for Certification, you must create and populate the CEU_TYPE general lookup/validation table (see "Events: Set up tables") to use the lookup and validation features of this field.

If you are licensed for Certification, lookup and validation of this field is performed against types defined in Certification. You can also use the CEU_TYPE table in combination with Certification types. In this case, codes are listed alphabetically when using the lookup function.

> **Note:** Note: If a CEU code appears both in Certification and in the CEU_TYPE table, the code from Certification is used.

This field's prompt can be customized on the Customer Setup - Advanced window.

Hours/Points

Specifies the number of units or hours to be awarded for attending the course.

This field's prompt can be customized on the Customer Setup - Advanced window.

Update Attendance

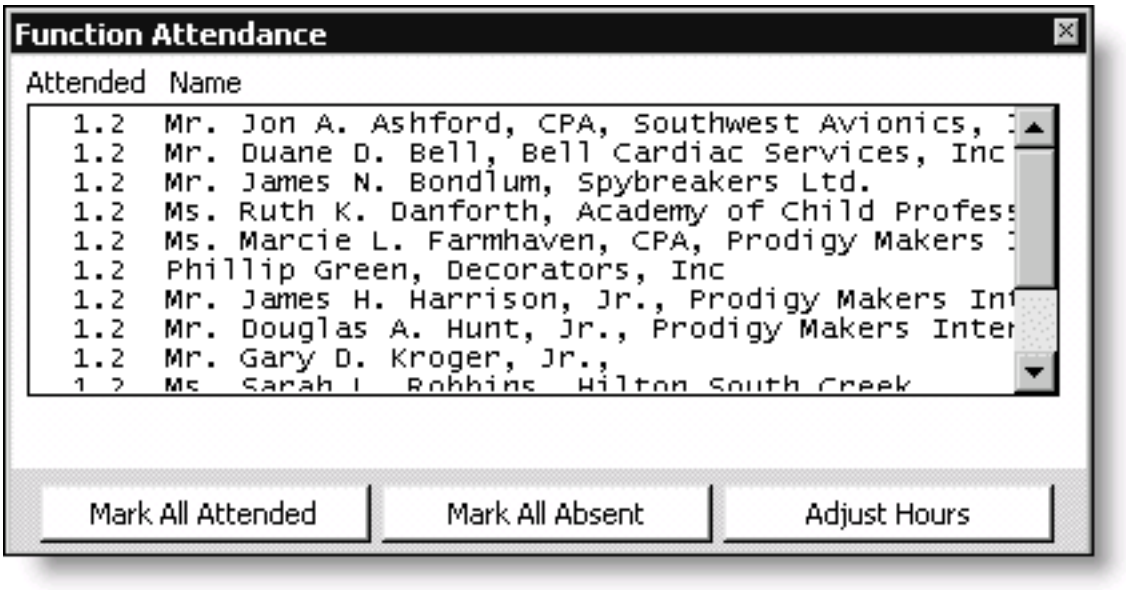
Opens the Function Attendance window used for awarding CEU hours/points.

To track credit for continuing education

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit to open the Event Function Detail window.
4. Click More, and select CEU to open the Event Function Definition - CEU window.
5. Enter the CEU Type (use the lookup icon to find a CEU type).
6. Enter the Hours/Points.
7. Click Save.

Function Attendance window

The Function Attendance window displays a list of non-canceled registrants for a selected function and is used for awarding CEU hours/points.



From Events, select Define an event, double-click an event, double-click an event function, click More, select CEU, and click Update Attendance

Mark All Attended

Changes the attendance status for all individuals on the roster to “Attended.”

Mark All Absent

Changes the attendance status for all individuals on the roster to “Absent.”

Adjust Hours

Adjusts the default credit hours set for this function.

To mark attendance

The first time you open the Function Attendance window for a function, all registrants appear on the list with an unmarked attendance status. When a registrant's status is changed to “Attended,” a pointer and the amount of continuing education credits awarded appear in the Attended column.

Mark attendance by double-clicking on the individual's name to change the attendance status as follows:

- If the line is unmarked (no pointer and zero hours/points in the Attended column), double-clicking marks it as Attended.
- If the line is marked, double-clicking will unmark it.

This toggling action lets you mark attendance by either of these two approaches:

- Manually mark each individual who attended.
- Globally mark the group and, on an exception basis, only unmark those who did not attend (no-shows).

To update attendance (CEU)

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit next to the list of functions to open the Event Function Detail window.
4. Click Cancel.
5. Click More, and select CEU to open the Event Function Definition - CEU window.
6. Click Update Attendance to open the Function Attendance window.
7. Mark the registrants as attended. You have two options:

- Click Mark All Attended to select all the registrants, click Yes, and then double-click the registrants who did not attend the function to mark them as absent.
- Double-click each registrant individually to mark them as attended.

8. If you make mistakes or lose track of your changes, return all individuals to the unmarked status, click Mark All Absent, click Yes, and start over with the attendance marking.

To adjust continuing education credits

Complete the following steps to adjust the continuing education credits awarded to a registrant to an amount other than that defined for the function:

1. From Events, select Define an event to open the Define an event window.

2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit next to the list of functions to open the Event Function Detail window.
4. Click Cancel.
5. Click More, and select CEU to open the Event Function Definition - CEU window.
6. Click Update Attendance to open the Function Attendance window.
7. Select a registrant on the Function Attendance window.
8. Click Adjust Hours to open the Adjust Hours window. You may have to reposition the Function Attendance and Event Function Definition - CEU windows.
9. Enter the correct credit amount for the registrant.
10. Click Save.

Linking event functions

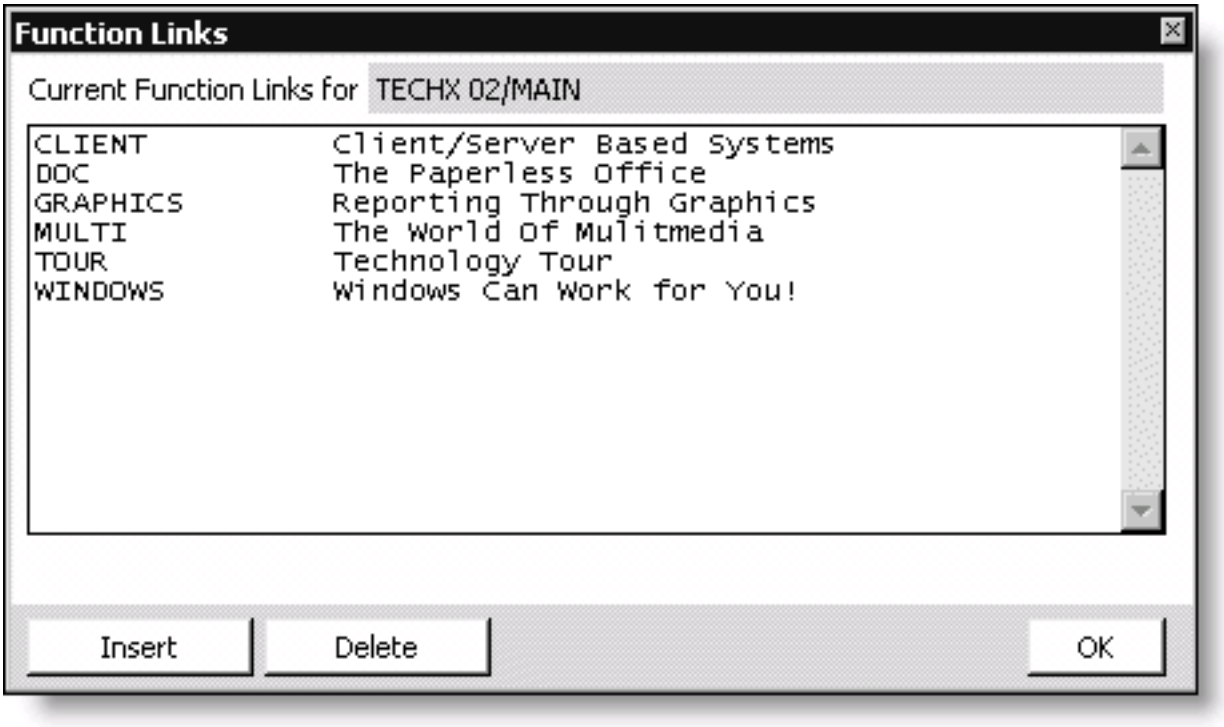
The Links option enables you to associate a primary (parent) event function to secondary (child) event functions. When a registrant registers for the primary event function, iMIS automatically registers the registrant for all secondary functions that are linked to the primary function.

Linking event functions is a shortcut for data entry. If you clear the primary function, then iMIS leaves the linked function(s) selected (that is, selecting the parent also selects the children, but clearing the parent affects only the parent).

You have the option of individually selecting and clearing linked functions at any point during the event registration process. However, if you have no cost associated with an optional child function, such as a banquet that does not have an additional cost, you should set up the child function to be complimentary (with pricing) so that your headcount is accurate even when you remove someone from a parent function registration list.

Note: Note: The linking feature does not affect pricing or complimentary functions.

Function Links window



From Events, select Define an event, double-click an event, double-click an event function, click More, and select Links

Current Function Links for

Displays the primary event function name.

Function Links

Lists the secondary event functions that are linked to the primary function.

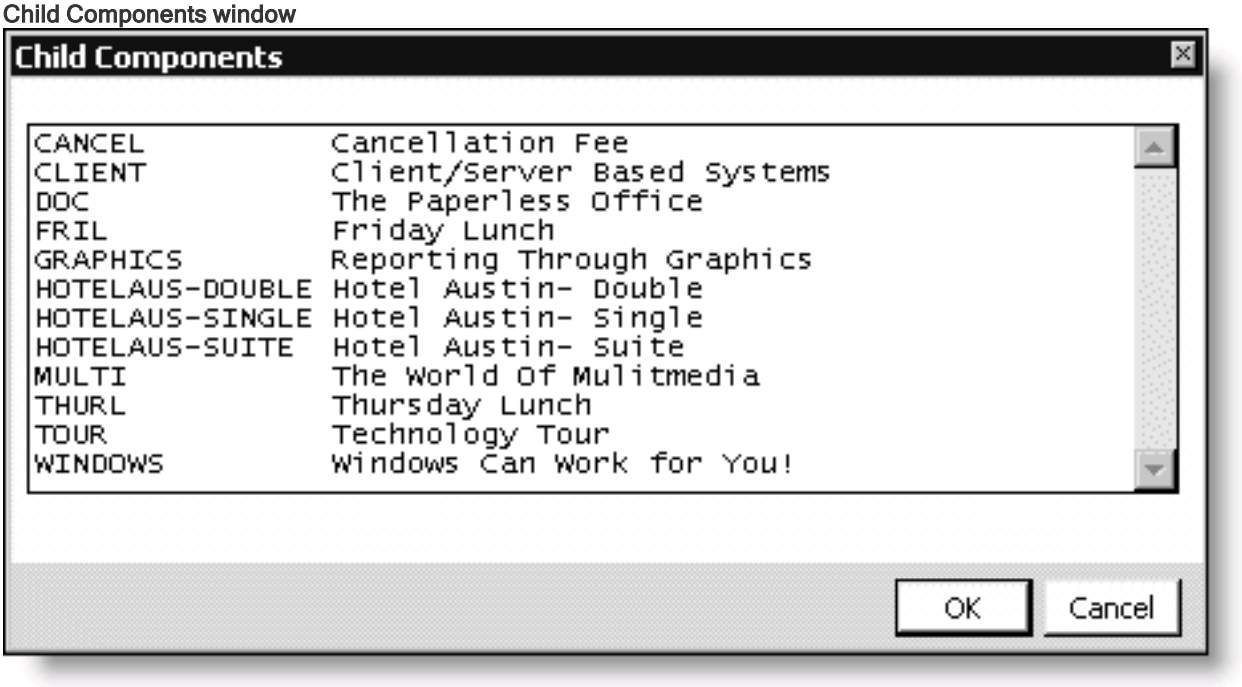
Insert button

Opens the Child Components window. The Child Components window lists all of the secondary event functions.

Delete button

Used to disable a linked secondary event function.

Child Components window



From Events, select Define an event, double-click an event, double-click an event function, click More, select Links, and click Insert

Secondary Functions

Lists all of the secondary event functions that are not linked to the primary event function.

To link event functions

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit to open the Event Function Detail window.
4. Click Cancel.
5. Click More, and select Links to open the Function Links window.
6. Click Insert to open the Child Components window.
7. Select a secondary event function that you want to link to the primary function.

8. Click OK to link the secondary function to the primary function. The Child Components window will close, and the linked function will be added to the Function Links window.
9. Click OK.

> **Note:** Note: To print tickets for a MEMO function, it must be linked to a REG function, and Print Tickets must be enabled for the REG function.

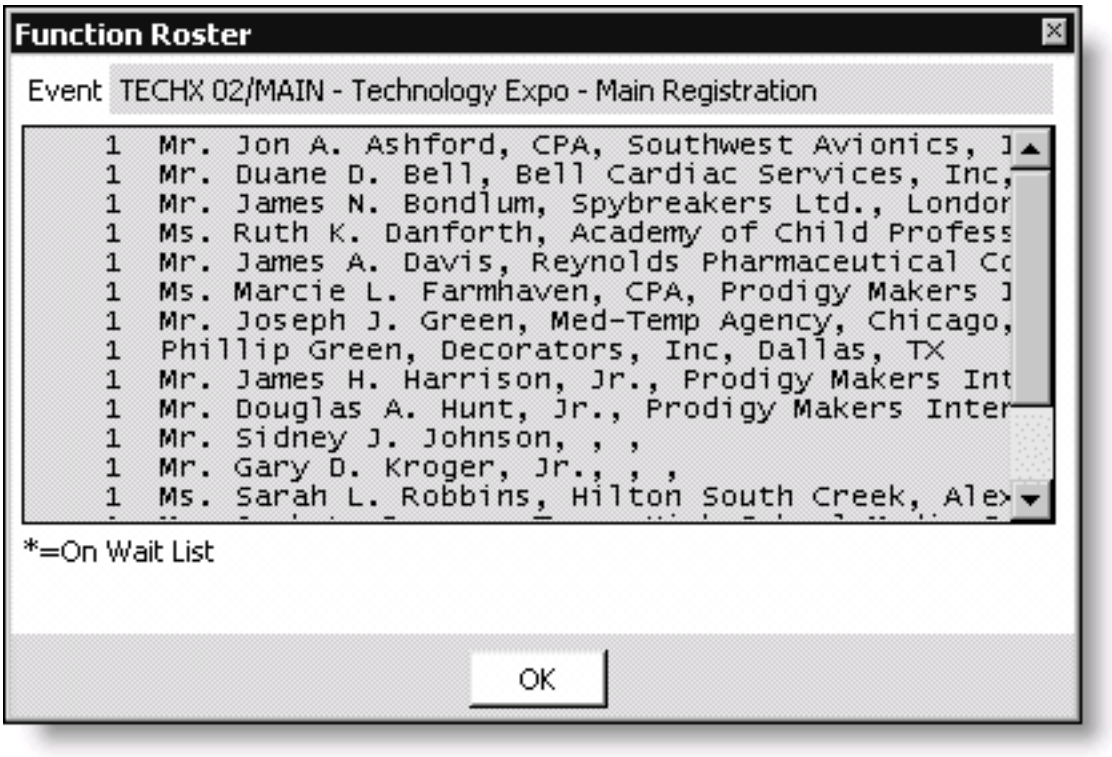
To delete an event function link

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit to open the Event Function Detail window.
4. Click Cancel.
5. Click More, and select Links to open the Function Links window.
6. Select the linked secondary event function you want to delete.
7. Click Delete.
8. Click Yes.
9. Click OK.

Note: The primary and deleted secondary function(s) are no longer linked. You did not delete any functions. If you completed a registration with a primary function linked to a secondary function, you manually must delete the linked (secondary) function from the registration.

Viewing the function roster

Use the Function Roster window to view a list of registrants who have signed up for a function.



From Events, select Define an event, double-click an event, double-click an event function, click More, and select Roster

Event

Lists the event code, event title, and function title.

Function Roster

Lists all of the event function's registrants.

To view an event function roster

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Edit to open the Event Function Detail window.
4. Click Cancel.
5. Click More, and select Roster to open the Function Roster window.

Editing event functions

All available event functions appear in the scrolling area of the Define an event window. You can edit and delete functions using the buttons next to the list of functions.

To edit event functions

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the detailed Define an event window.
3. Select an event function, and click Edit to open the Event Function Detail window.
4. Make any necessary changes.
5. Click Save.

To delete an event function

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select an event function, and click Delete.

   A system message prompts you to verify the function's deletion.
4. Click Yes to delete the function.

   Note: You cannot delete a function until you cancel all registrations for the function. If you attempt to delete a function that has registrants, a system message explains why you cannot delete the function.

Events Setup

Events: Set up module

iMIS Events has its own system setup where you define global parameters, such as user-defined descriptions and registration fields.

Based on your organization's requirements, you will select from a number of options on the Set up module window. These options have global implications for the management of your events.

Events includes a wait list feature that enables you to add potential registrants to a wait list when an event function is full. By enabling the wait list options, you can take full advantage of this feature.

Events also provides several advanced features that enable you to customize your module. By mapping additional fields to event activity records, you can extend the range of the information you collect about an event.

See AR/Cash "Deferred Income in iMIS" for "Deferring dues/subscriptions income" and "Deferring events/exhibition/exposition income".

Events: Set up tables

Events provides several General Lookup/Validation tables that help you manage your events:

BADGE_TYPE

Stores the badge types needed for your events. The Events module comes with two predefined badge types: Free_Pass and Paid_Pass. Free passes come with the purchase of a booth. For example, when setting up your event, if you indicate that each booth unit receives two free passes, that is the number of free passes available to the registrant for each booth unit.

A Paid_Pass is a specific product defined at the event function level. For example, registrants may want to purchase additional badges with their booth order. The BADGE_TYPE information is available from the Register a customer window's Badges tab. As you issue each badge, you can see the number available for each Paid and Free Pass type displayed below the data entry area.

Although the Events module comes with the Free_Pass and Paid_Pass badge types already defined, you can define as many badge types as you need for your particular

event. Badge types will be available on the Badges tab only if they have been defined in the BADGE_TYPE General Lookup/Validation table.

CEU_TYPE

Stores continuing education units (CEU) type codes used for validation and lookup of CEU credit entries if you are not licensed for the Certification module.

If you are licensed for Certification, lookup and validation of CEU Type fields are performed against CEU type codes that are defined in Certification. If this CEU_TYPE table is also populated with CEU type codes, then the codes from both sources are combined and listed alphabetically when you click the CEU Type field's Lookup icon.

Note: Note: If an identical CEU type code exists both in Certification and in the CEU_TYPE table, the code from Certification is used.

CONFLICT_CODE

Stores codes used in determining date/time conflicts and content conflicts between events. Registering for conflicting event functions will display a warning message.

GL_ACCOUNT

Stores accounting codes. If the Validate G/L Accounts option is enabled on the AR/Cash General Ledger Interface window, then the table will be used to validate accounting codes. If the option is not enabled, you may enter codes that are not in the table.

MEETING_TYPE

Stores codes used in distinguishing different types of events, such as CONF for conference and SEM for seminar.

PREFIX

Stores titles and abbreviated titles that precede a customer's formal name, such as Mr., Ms., and Dr.

SOURCE_CODE

Stores codes used in specifying the marketing program or contact type that generated an accounting transaction, such as phone and mail. Enable the Force Source Coding option on the Customer Setup - Basic Options window to require source coding.

SUFFIX

Stores titles and abbreviated titles that follow a customer's formal name, such as Jr., Sr., II, and III.

TITLE

Stores professional titles and positions, such as CEO, COO, and CMO.

To create General Lookup/Validation tables for events

1. Select Customers > Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Select the drop-down arrow to display a list of table types.
3. Scroll to the bottom of the list, and select (New Table). A data entry window opens.
4. Enter a New Table Type in the window.
5. Click Save to return to the Set up general lookup/validation window.
6. Click New.
7. Enter the table information:

- Enter a Code for the new definition.
- (optional) Enter an expansion value for the code.
- (optional) Enter a brief Description of the defined item.

8. Click Save.

Setting up basic event information

You must perform basic system setup activities before you can begin using the Events module. System setup information is entered on the Set up module and Event System

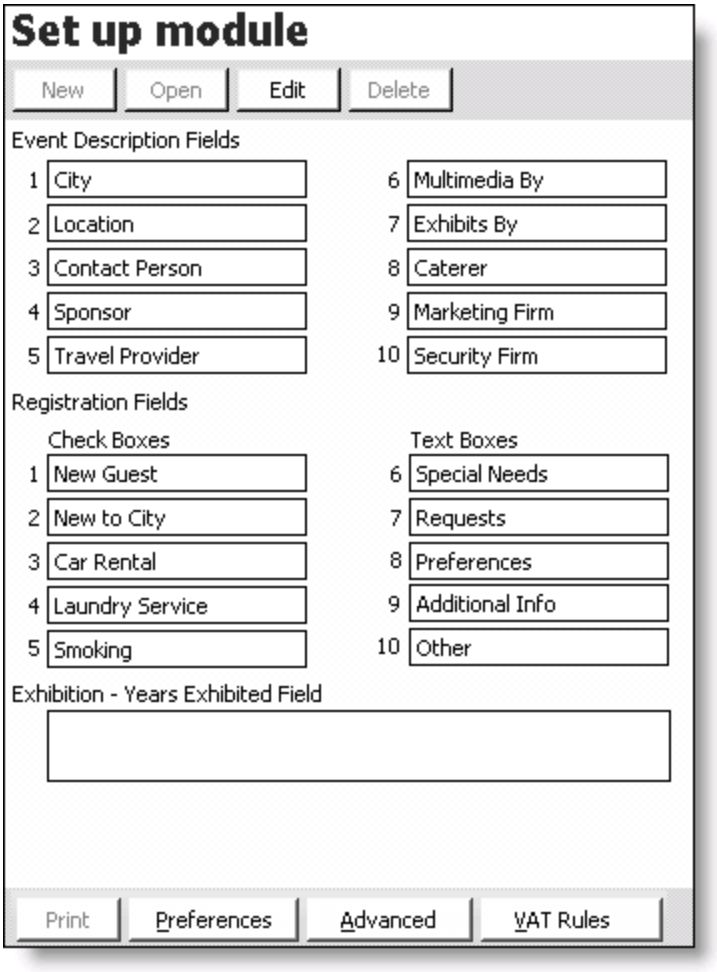
Preferences windows. Some setup also is performed on the Events Advanced Features window (see "Setting up advanced features").

The Set up module window contains options grouped into three areas: Event Description Fields, Registration Fields, and the Exhibition - Years Exhibited Field. By entering user-defined information in these fields, you customize the information that appears on the Event Description window and the Register a customer window's Other tab.

Information you define in the Event Description Fields appears as labels on the Event Description window. For example, you may want to have fields that specify the location of the event, who the event contact is, or other pertinent event information. These fields will not appear on the Event Description window unless they are given labels on the Set up module window.

Information added in the Registration Fields appears as fields on the Register a customer window's Other tab. This is helpful if you want to track information about registrants, such as first-time attendee status, the registrant has special room needs, or other information that might be helpful for analysis and future planning.

Set up module window for Events



From Events, select Set up module (VAT Rules appears only if VAT is enabled)

Event Description Fields

These user-defined description fields display on the Event Description window.

Registration Fields

These user-defined registration fields display on the Register a customer window's Other tab.

Exhibition - Years Exhibited Field

This custom field stores the number of years exhibited. You must be licensed for Exhibition in order to use this field.

Preferences button

Opens the Event System Preferences window where you can enable several options.

Advanced button

Opens the Events Advanced Features window.

VAT Rules button

(if licensed and enabled at the organization level) Opens the VAT Rules window, for optionally defining rule sets for “place of supply” requirements. See “Defining VAT Rules for Events” in International Taxation.

To add user-defined Event Description Fields

1. From Events, select Set up module to open the Set up module window.
2. Click Edit.
3. Enter the field names in the Event Description Fields that you want to display on the Event Description window. The user-defined fields entered on the Set up module window display as data entry fields on the Event Description window.
4. Click Save.

To add user-defined event Registration Fields

1. From Events, select Set up module to open the Set up module window.
2. Click Edit.
3. Enter the field names in the Registration Fields that you want to display on the Register a customer window's Other tab. The user-defined fields entered on the Set up module window display as data entry fields on the Other tab.
4. Click Save.

To add field names to the Exhibition - Years Exhibited Field

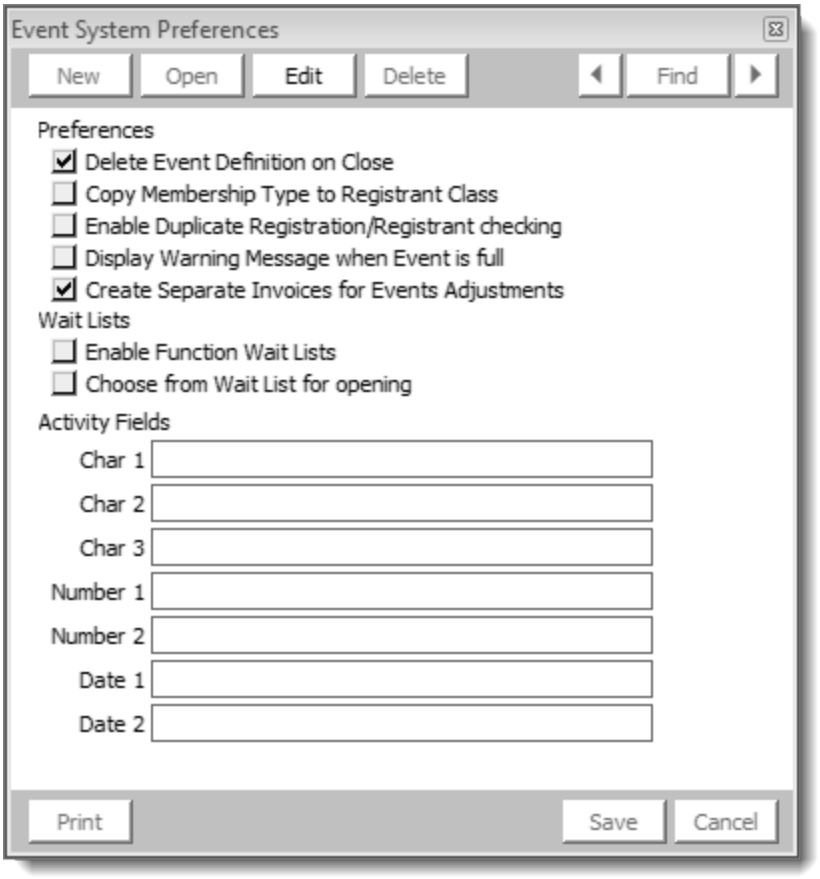
1. From Events, select Set up module to open the Set up module window.

2. Click Edit.
3. Enter the field name in the Exhibition - Years Exhibited Field that will store the calculated number of years exhibited.
4. Click Save.

Enabling event system preferences

The Event System Preferences window has several setup options you need to consider when planning your management system for Events. Each of these options is discussed in detail in the following procedures.

Event System Preferences window



From Events, select Set up module, and click Preferences

Preferences

Delete Event Definition on Close - Enabling this option has significant implications. If enabled, all event definition records and function definition records are deleted when you close the event.

If you do not enable this option, you can retain the event definition and summary records, which may be important to you when cloning events. The event remains listed on the Define an event window with a status of C for closed.

Copy Membership Type to Registrant Class - iMIS can copy the customer type code directly to the registrant class code if you need to assign fees or group registrants at the customer type level. All non-represented types map to the basic Member (M) or Non Member (NM) classes. You can directly override any system-assigned class on the Event Registration window. If you want to use customer types to define your registrant classes, you can copy the existing customer types from the Set up customer types window to the Set up registration classes window. For example, if you have a student type (customer type = STU) that you need to assign different product fees to, enter the same customer type code on the Set up registration classes window. You can select the customer types that you want to use only by entering matching codes for those types.

Enable Duplicate Registration/Registrant checking - This option compares registrants without customer IDs to the customer database. When this option is enabled and iMIS finds a customer with the same first and last name as the registrant, a warning message displays informing you that the person may already exist in the database.

Display Warning Message when Event is full - This option enables a warning message when the maximum event registration limit has been reached. This option is not related to the Wait Lists options.

Create Separate Invoices for Events Adjustments – (option only available for organizations whose Taxation Method is set to VAT) To comply with regulations related to VAT invoicing, enable this option so that new invoices are generated for financial adjustments made to event registrations. Once the original invoice is printed, then the line items, quantities, and amounts in that document will not change. With this option, every adjustment generates a new invoice document (credit note or positive adjustment), which uses

the date of the adjustment, lists any credits or debits, and references the original invoice. These invoices can be viewed and printed from Events > Register a customer > Account Info tab.

> **Note:** Note: Enabling this option affects new event registrations only; existing registrations retain their consolidated, single invoice.

Wait Lists

Enable Function Wait Lists - This option enables the wait list for all event functions that have an entry in the Maximum field.

Choose from Wait List for opening - When this option is enabled, you can select from the wait list which registrant you want to register for a function when it becomes available.

Activity Fields

These seven mapped fields can be defined to capture and store order information in the registrant's activity records. See "To map user-defined fields to event activities" for details.

To delete an event definition on close

1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit on the Event System Preferences window.
4. Enable the Delete Event Definition on Close option.
5. Click Save on the Event System Preferences window.

To copy customer type codes to registrant class codes

1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit.

4. Enable the Copy Membership Type to Registrant Class option.
5. Click Save.

Note: You must have the same information on both the Set up registration classes and Set up customer types windows for the customer types to display in the Event Function Definition - Fees window.

To enable Duplicate Registration/Registrant checking

The Enable Duplicate Registration/Registrant checking option on the Event System Preferences window (Events > Set up module, Preferences) turns on duplicate checking for registrants. It may be useful if you routinely register customers who do not have records in the customer database. When this option is enabled and a suspected duplicate registrant is entered, a message appears on the Register a customer window stating that the customer is already registered for the event.

1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit.
4. Enable the Enable Duplicate Registration/Registrant checking option.
5. Click Save.

To display a warning message when an event is full

1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit.
4. Enable the Display Warning Message when Event is full option.
5. Click Save.

Enabling event wait lists

The Enable Function Wait List option allows iMIS to maintain and check wait lists for event functions that have specified enrollment limits. Wait listing is useful for registrants when another registrant cancels their order, the maximum attendance limit is increased, or both. To use the wait list option, you must have a value in the Maximum field in the Event Function Detail window, and you must enable the Enable Function Wait List option on the Event System Preferences window at system setup.

> **Note:** Note: Enable only if you intend to use it; wait list checking makes registration processing more complex, which could affect system performance.

If you enable the Enable Function Wait Lists option, the system assigns the opening to the first registrant on the wait list. If you enable the Choose from Wait List for opening option, you can select a registrant from the wait list to fill the opening if a registrant cancels his order or the attendance limit is increased.

To enable function wait lists

The Enable Function Wait List option applies only to event functions that have a non-zero Maximum amount specified. You can view the registrants on the wait list for a specific function by clicking More and selecting Roster on the Event Function Detail window.

1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit.
4. Enable the Enable Function Wait Lists option.
5. Click Save.

During registration, as long as the Maximum attendance limit has not been reached (or is not set to 0), registrations proceed as usual. However, after a function reaches its maximum attendance limit, iMIS prompts you to place new registrants on a wait list for that function. You can easily cancel the function request at this point to prevent the registrant

from being added to the wait list. If the registrant is added to the wait list for a function, that function is prefaced with an asterisk on the registrant's list of enrolled functions.

If you cancel (clear) a registration for a particular function for which a wait list exists and the Choose from Wait List for opening option is activated, iMIS prompts you to select a replacement registrant from the wait list to complete the cancellation. Select from the wait list iMIS presents (sorted so that the first person added appears at the top). When you click Save, iMIS updates both attendees' registration records.

iMIS will automatically select replacements from the wait list under the following conditions:

- The Maximum attendance limit is increased in the Event Function Detail window.
- A registration is canceled.
- An individual registration function is canceled, and the Choose from Wait List for opening option is not activated.

To enable the Choose from Wait List for opening option.

1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit.
4. Enable the Choose from Wait List for opening option.
5. Click Save.

Mapping user-defined fields to event activity records

iMIS has the ability to map user-defined fields to event activity records. This system setup function lets you specify up to seven event-related data fields (three character, two numeric, and two date fields) to be added to each registrant's activity record when an event is closed. The data can come from the individual registration data, such as the user-defined fields, or from event definition information from the following tables:

- Meet_Master
- Order_Meet
- Order_Badge (Primary badge only)
- Orders

If you want to view the added data on the Manage customers window's Activities-All tab for the registrant, you can edit the Event activity type and provide meaningful prompts for the user-defined fields.

To map user-defined fields to event activities

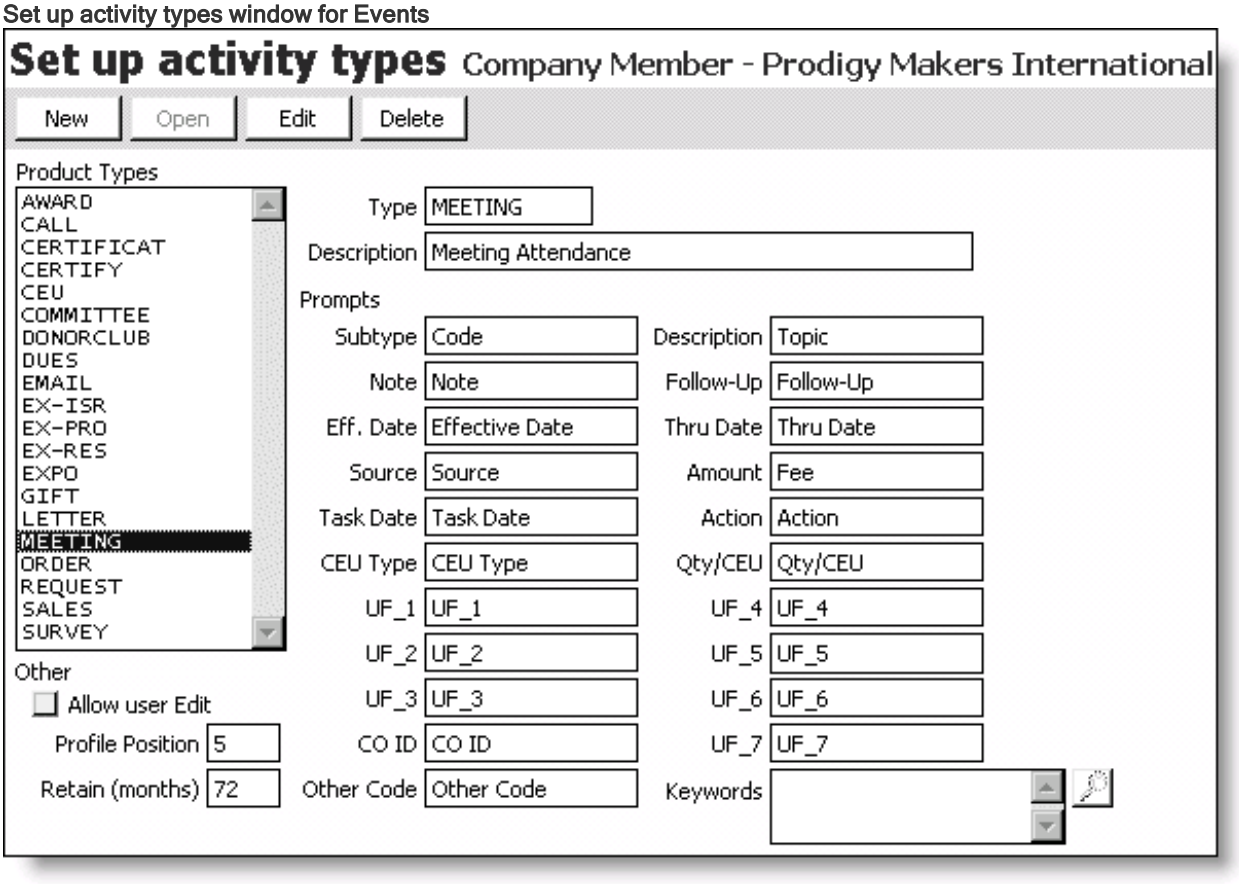
1. From Events, select Set up module to open the Set up module window.
2. Click Preferences to open the Event System Preferences window.
3. Click Edit.
4. Enter additional activity fields for iMIS to track. For example, to track the first user-defined registration text field, enter Order_Meet.UF_6.
5. Click Save.
6. From Customers, select Set up module> Activity types to open the Set up activity types window.
7. Select MEETING from the Product Types list.
8. Click Edit.
9. Enter the field labels you want to appear in the individual activity records. The seven UF fields listed under Prompts correspond to the seven fields on the Event System Preferences window.

- UF_1-UF_3 map to Char 1-Char 3
- UF_4-UF_5 map to Number 1-Number 2
- UF_6-UF_7 map to Date 1-Date 2

10. Click Save.

After an event is closed, you can view event-related activities on the Manage customers window's Activities-All tab for registrants with customer records.

Set up activity types window for Events



From Customers, select Set up module > Activity types

Product Types

Lists all of the defined activity types.

Type

Specifies an activity type prompt.

Description

Specifies a description prompt for the activity type.

Prompts

- Subtype - Specifies a subtype prompt.
- Description - Specifies a description prompt for the subtype.
- Note - Specifies a note prompt.
- Follow-Up - Specifies a follow-up prompt.
- Eff Date - Specifies an effective date prompt.
- Thru Date - Specifies a thru date prompt.
- Source - Specifies a source prompt.
- Amount - Specifies an amount prompt.
- Task Date - Specifies a task date prompt.
- Action - Specifies an action prompt.
- CEU Type - Specifies a CEU type prompt.
- Qty/CEU - Specifies a CEU quantity prompt.
- UF1 - UF3 - Use these fields to enter prompts for the values entered in the Char 1 - Char 3 fields on the Event System Preferences window.
- UF4 - UF5 - Use these fields to enter prompts for the values entered in the Number 1 - Number 2 fields on the Event System Preferences window.
- UF6 - UF7 - Use these fields to enter prompts for the values entered in the Date 1 - Date 3 fields on the Event System Preferences window.
- CO ID - Specifies the company ID prompt.
- Other Code -Specifies another code prompt.

  Keywords

  Specifies keywords (use the lookup icon to open the Select ACCESS_KEYWORDS value(s) window and search for defined keywords.

  Other

- Allow user Edit - Enable to allow users to edit activity records.
- Profile Position - Specifies the profile position.
- Retain (months) - Specifies the number of months the activity record will be retained.

To view event activities for a registrant

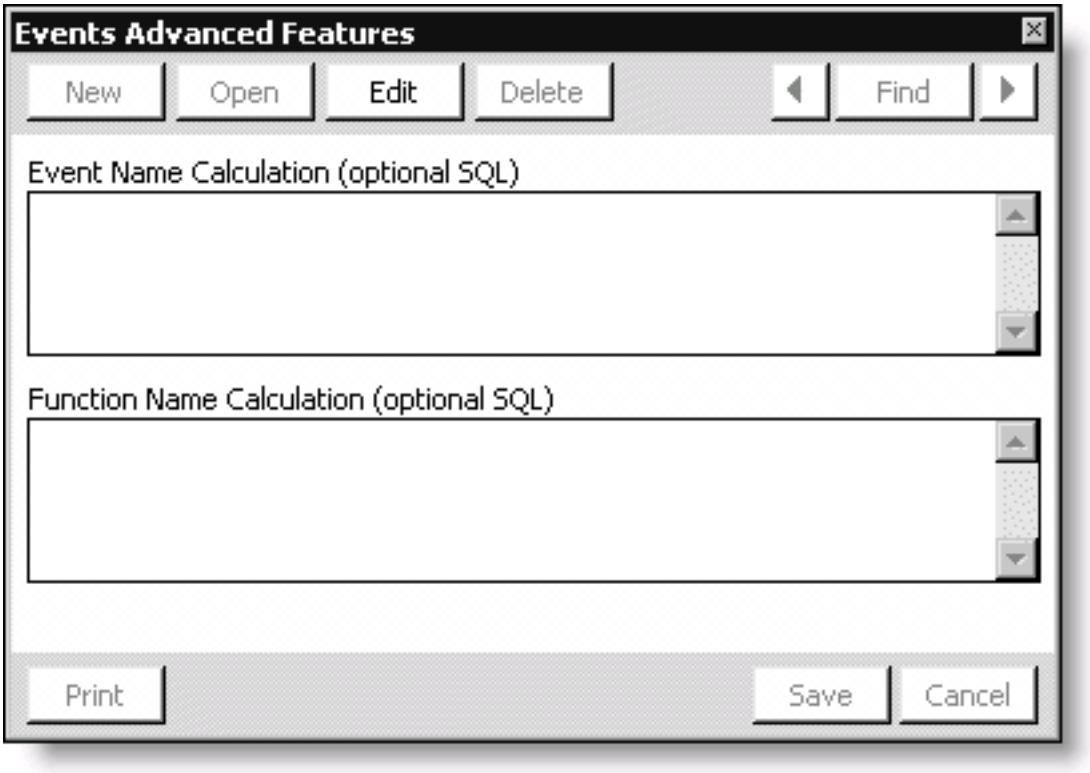
1. Select Customers > Manage customers to open the Customer Portfolio.
2. Find the registrant's record.
3. Select the Activities-All tab.
4. Select MEETING from the drop-down list under the Sort by options.

   Note: MEETING activities, which are created when events are closed, do not include fundraising information, such as GIFT activities generated by a fundraising function registration.
5. Double-click an event to open the Activity Detail window.

Setting up Advanced features

You can set up instructions on the Events Advanced Features window so overall event codes or function codes are automatically assigned or auto-generated according to a formula of your own choosing (as opposed to user-assigned codes). For example, if you create an auto-generated formula (an appropriate SQL script is entered in the Event Name Calculation field) when you insert a new event or function, a system-assigned code is automatically inserted, rather than the system prompting you to type a user-assigned code.

Events Advanced Features window



From Events, select Set up module, and click Advanced

Event Name Calculation (optional SQL)

Specifies the name of the SQL string used to store the procedure that automatically assigns event codes.

Function Name Calculation (optional SQL)

Specifies the name of the SQL string used to store the procedure that automatically assigns function codes.

To create a stored procedure

1. From the menu bar, select Utilities > SQL Query to open the SQLQuery window.
2. Click New.
3. Enter the SQL command in the SQL Command Text field. For example, the following

SQL command will create a stored procedure to generate unique, consistent event codes that include the year and event number count:

```
CREATE PROCEDURE Meeting_Calc @MeetingCounterName varchar (30) AS

Declare @MeetingCounter int, @Count int
select @Count=Count(*) from Counter
where COUNTER_NAME=@MeetingCounterName
if @Count=0
begin
insert into Counter (COUNTER_NAME,LAST_VALUE)
values (@MeetingCounterName,1)
select @MeetingCounter=1
end
else
begin
update Counter set LAST_VALUE=LAST_VALUE+1
where COUNTER_NAME=@MeetingCounterName
select @MeetingCounter=LAST_VALUE from Counter
where COUNTER_NAME=@MeetingCounterName
end
select convert(varchar,datepart(yy,getdate()))+convert(varchar,@MeetingCounter)
```

4. Click Execute.

To set up event and function name calculations

1. From Events, select Set up module to open the Set up module window.
2. Click Advanced to open the Events Advanced Features window.
3. Click Edit.
4. Enter the SQL string that executes the stored procedure in the Event Name Calculation field or the Function Name Calculation field. For example, enter Meeting_Calc

'MeetingCounterName' in the Event Name Calculation field.

5. Click Save.

Events Table Maintenance

Table maintenance enables you to manage the two tables that iMIS Events refers to during its daily operations.

- Set up registration classes lets you define which classes display as categorization options for individuals registering for your events.
- Set up event resources lets you define which resource options display for the room/-function planning subsystem.

Defining event registration classes

Set up registration classes lets you manage the categories for customers that you plan to register for an event.

You should create categories for all groups for which you need to do the following:

- Charge different fees
- Track
- Print badges
- Report on separately

A set of registrant classes can include member, non-member, exhibitor, speaker, staff, student, and volunteer. When you set up your categories, include all of the classes that you will need for tracking and differentiating the registrants attending the largest events that you will process through iMIS.

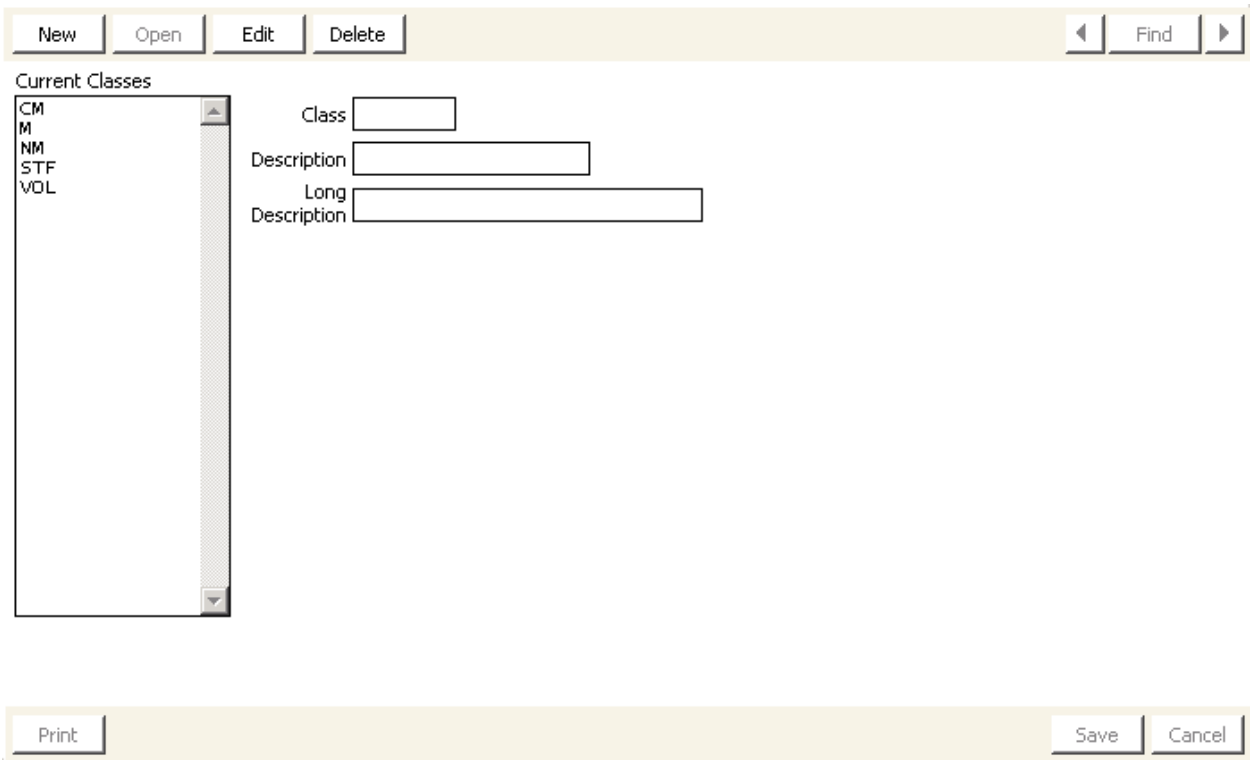
At its basic level, iMIS Events will categorize each event registrant into either the member (M) or non-member (NM) class because most organizations commonly assign registration fees at those levels. This determination is made based upon the registrant's customer type and whether or not the registrant's record is on file in the database.

> **Note:** Note: A non-member class will be assigned if the customer's status is set to suspended, inactive, or deleted (begins with S, I, or D).

These are three possible scenarios for defining event classes:

- Let the registrant class default to the M = Member or NM = Non-member type in the Member Type table. Using this scenario, all registrants are either members or non-members based upon their customer record.
- Map customer types to registrant classes. Using this scenario, you may or may not want to map all customer types. For example, you may want to map only M = Member, NM = Non-member, and CM = Company Member.
- Define your own registrant classes without using customer types. Using this scenario, you must override the M = Member and/or NM = Non-member status during the event registration process by entering the appropriate registrant class.

Set up registrant classes window



Admin Console: Configure > Events > Set up tables > Set up registrant classes

Desktop: Events > Set up tables > Registration classes

Current Classes

Lists all of the defined registrant classes.

Class

Specifies an abbreviation or alphanumeric code that represents a specific class or category of registrants.

Description

Specifies a description of the registrant class. The description entered displays in the Event Function Definition - Fees window.

Long Description

(optional) Specifies a detailed description of the registrant class.

To define event registration classes

1. From Set up registrant classes window, click New.
2. Enter the Class, Description, and Long Description.
3. Click Save.

Defining event standard resources

The Set up event resources window enables you to define all of the potential room/-function resource groups and items.

Standard resources define the elements you need in preparing the physical setting for an event function:

- Facilities
- Tools
- Refreshments

- Furniture
- Supplies

On the Set up event resources window, you can outline major planning resource groups and detail items (indented from the group heading). After you establish the groups and detail items, including assigning codes, descriptions, and the order in which they appear on the planning report, those resource groups and items are available when you activate any room setup/planning sheet.

Keep in mind that you can define any number of resource groups and detail items so you can cover the anticipated needs of any particular event or function. Extra resources will not clutter your planning reports; while you may have defined many resource areas on the window, only the ones that you need and activate for a particular event function appear on its planning report.

The Set up event resources window has three purposes and enables you to do the following:

- Define a full range of event planning resources (both groups and detail items) to accommodate and plan for any size and type of event
- Establish a print/display order for resource groups and items on the planning report (and related windows)
- Dictate the type of information that you can enter for a resource item when you define a plan, such as quantity, time, and notes

iMIS Events includes a sample set of resource entries. You are free to use and build on this skeleton sample or discard it. You can add, delete, and edit resource table records as needed.

When you define a resource group (such as Audio-Visual), you name, describe, and set the order in which each group should appear on reports and windows. Similarly, if a resource group has multiple detail items such as projectors and microphones, assign a ranking for these items as well.

Depending on the resources you select for a function, iMIS may prompt you for a quantity (of the resource needed) or a time (for which the resource is needed), or require you to verify that the resource applies. A large text area may appear for you to enter notes in the resource area. When you define a resource group or item, you also can specify which kinds of information it will accept.

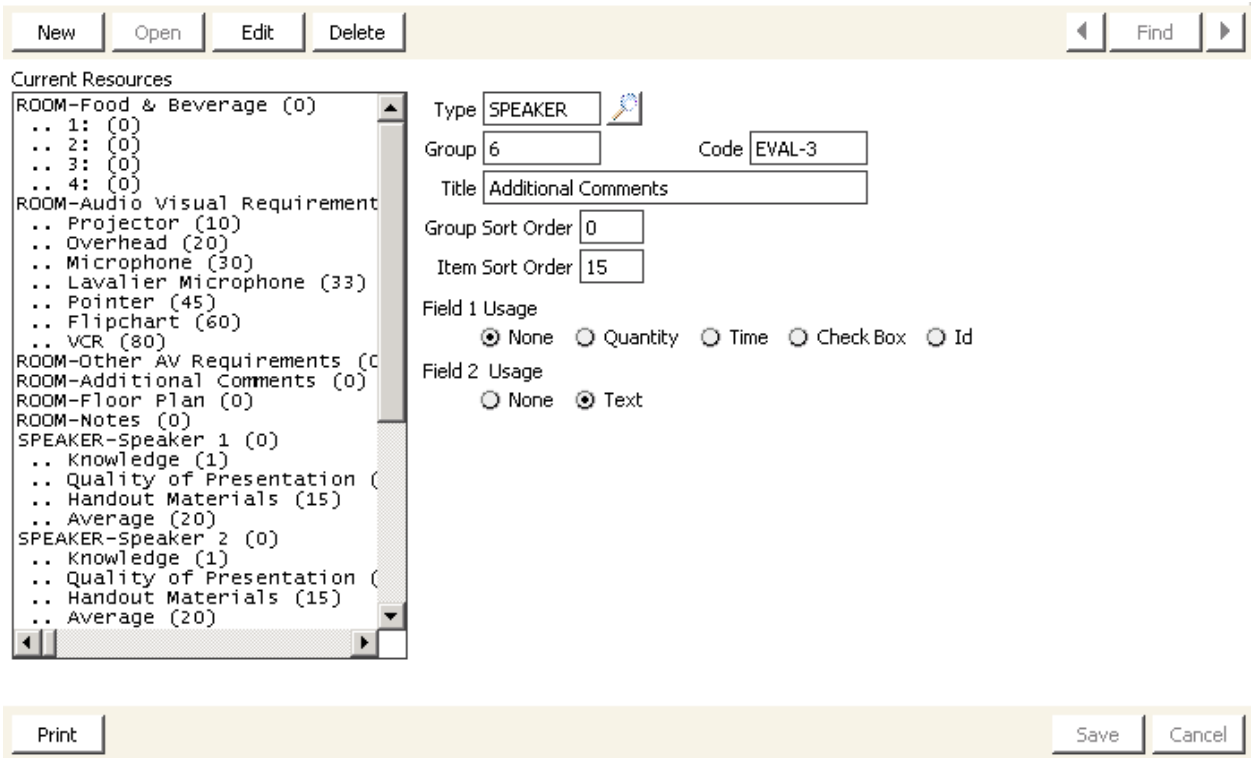
Sometimes a group may not have any detail items. Conversely, planning data may use only detail-level items (such as Audio-Visual: Microphone). In this case, the group entry provides a heading for its detail items included in the plan. When a group has no detail items, you enter planning information directly at the group level (as with Floor Plan and Notes above).

The Set up event resources window enables you to define the options that appear in the function/room setup and planning facility. If your license includes iMIS Speaker Evaluation, this window also lets you define the event/speaker evaluation areas you want to track.

The Room Setup facility provides planning reports and inquiry tools to help you organize the setup requirements for any function. Within iMIS Events, the room setup categories and items that you can specify for any function are referred to as resources. You determine the type of resource groups and items to have available for a planning facility. Overall resource groups include Audio-Visual (A/V) Equipment and Food and Beverage; items within the A/V group include microphones and overhead projectors.

When you plan your available resource groups and items, list all of the items that you may want to include for complex events in a planning sheet that you can give to hotel or other setup personnel.

Set up event resources window



Admin Console: Configure > Events > Set up tables > Set up event resources

Desktop: Events > Set up tables > Event resources

Current Resources

Lists the defined current resources and their detail items. Resource groups, such as ROOM-Audio Visual Requirements and Room-Other AV Requirements, sort according to the order you define. Detailed group items, such as Projector, Overhead, and Microphone, are indented and sorted under their respective groups.

Type

Specifies the event resource type. The type defaults to ROOM for the Room Setup event resource. Standard Ctrl+L lookup is available, and the codes listed in the lookup window are hard coded in iMIS.

Group

Specifies a subgroup if you want the event resource divided into groups. For example, F&B and A/V are subgroups of ROOM.

Code

Specifies a unique code for a specific resource or item in a group. For example, PROJ and OVER are items in the A/V group.

Title

Specifies a description of the resource group or code, depending on which you are currently defining. For example, the title for A/V is Audio Visual Requirements; the title for PROJ is Projector. This title appears on planning reports.

Sort Order

Specifies the sort order of the resources on lists and reports.

- Group Sort Order - Enter a number indicating the sequence of this group in relation to other groups.
- Item Sort Order - Enter a number indicating the sequence of this item in relation to other items in the same group.

Field 1 Usage

Select one of these options for each type/group/code combination. Data is entered on the Event Function Definition - Plan window during the setup of the event:

- None (default) - When defining a group, enable this default option when the following options are not required.
- Quantity - Enable when you need to enter a quantity for a specific item, such as 2 microphones.
- Time - Enable to enter a specific time the item is required. For example, coffee will be needed at 7:00 am.
- Check Box - Enable if a specific item is required (the resource does not require quantity or time indications).

- ID - Enable when the Type is SPEAKER to link the speaker's customer record to ratings data. The ratings data will be transferred to an activity record at the close of the event.

  Field 2 Usage

  Select one of these options for each type/group/code combination. Data is entered on the Event Planning Definition - Plan window during the setup of the event:

- None (default) - Enable when text is not required.
- Text - Enable to enter text notes or comments for groups or specific items.

  To define event resource groups

1. From Set up event resources window, click New.
2. Enter a resource Type (press Ctrl+L to select a value).
3. Enter a Group code, for example, A/V.
4. Enter a Title for the group, for example, Audio Visual Requirements.
5. Enter the Group Sort Order, for example, 10.
6. (optional) Enable the Text option under Field 2 Usage.
7. Click Save.

   To define resources for a group

   After defining an event resource group, you will need to define the resources for the group.

1. From Set up event resources window, click New.
2. Enter a resource Type (press Ctrl+L to select a value).
3. Enter the Group code established in the above procedure, for example, A/V.
4. Enter a resource Code for the group.
5. Enter a Title for the resource code.
6. Enter the Group Sort Order defined in the above procedure.

7. Enter an Item Sort Order.
8. (optional) Enable a Field 1 Usage option.
9. (optional) Enable the Text option under Field 2 Usage.
10. Click Save.

Events Accounting

When you finish entering a new event registration or updating an existing one, files are simultaneously updated (unless you have enabled the Separate Posting Cycle Required option on the AR/Cash Batch Control window).

Orders and Order_Lines

A record in Orders (header record) is generated for each new event/registrant combination, and one Order_Lines record is generated for each function for which a customer registers.

> **Note:** Note: Existing order lines do not change if a function's Entity, Appeal, Campaign, and Fair Market Value are changed unless the customer un-registers for that function and re-registers after the new values are in place.

Trans

When you enter a new registration, a multiple-line/record transaction entry is generated for each of the following:

- Payment in Full - Generates a debit to cash for the amount of the payment and a credit to income/deferred for total amount of fees
- No Payment - Generates a debit to the default AR account and a credit to income/deferred in the amount of the total fees
- Under Payment - Generates a debit to cash for the amount of the payment, a credit to income/deferred for the total amount of fees, and an additional debit to the default AR account for the remaining amount owed

- Over Payment - Generates a debit to cash for the payment amount, a credit to income/deferred for the total amount of fees, and an additional credit to the default AR account for the amount overpaid.

  Invoice (for registration)

  One record is generated for each registration, showing the overall balance, if any. Changes made to an existing registration, such as payments, functions, or cancellations, generate a set of new Trans entries and update pre-existing records in the Orders, Order_Lines and Invoice Tables.

  > **Note:** Note: Unlike other accounting software, direct payments made through AR/Cash (direct Trans Table entries) post to the payment accumulator in both the related Invoice and the orders record, to keep the balances synchronized. Using this feature, you can process late event-related payments efficiently on the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions> Cash receipts).

  Invoices for event adjustments

  > **Note:** Note: This option is currently only available to organizations whose Taxation Method is set to VAT.

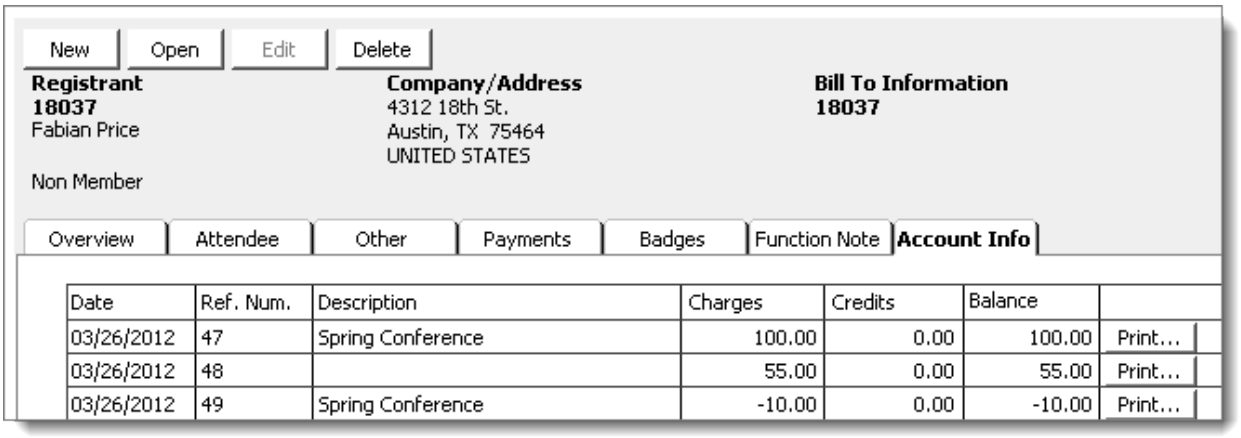
  The new Event System Preferences option to Create Separate Invoices for Events Adjustments makes it easier to track and print registration adjustments for both online and on-site events, to help you comply with regulations related to VAT invoicing. With this option, every adjustment generates a new invoice document (credit note or positive adjustment), which uses the date of the adjustment, lists any credits or debits, and references the original invoice.

  This option links multiple invoices to a single user event registration, so that, when a user registers for an event, any billing information is associated with an initial invoice. Once that invoice is printed, any subsequent changes are then associated with a new invoice. You can view and print these invoices from Events > Register a customer > Account Info

tab. Double-click the line to view a full transaction ledger for each invoice, including any event transfers or substitutions.

Note that enabling this option affects new event registrations only; existing registrations retain their consolidated, single invoice.

Note: Note: Only Crystal Reports currently support event adjustment invoices.



Multiple entities in events

If multi-entity is enabled in your iMIS system, you can use multiple income entities within event registrations. The income entity for an event function is designated by the most specific income entity defined. For example:

- if the event function has an entity defined on the Event Function Detail window that entity is used, otherwise
- if the event has an entity defined on the Define an event window that entity is used, otherwise
- if there is a default meeting entity defined in the AR/Cash module that entity is used, otherwise
- the default system entity is used

> **Note:** Note: You must enable the Multiple Entities checkbox option on the AR/Cash Set up module window to use Entity Codes with Events and Event Functions.

Individual order lines to support different entities for functions

Each event function can have its own income entity, therefore each event function has its own order line.

> **Note:** Note: Existing order lines do not change if a function's Entity, Appeal, Campaign, and Fair Market Value are changed unless the customer un-registers for that function and re-registers after the new values are in place.

Income GL Account Hierarchies for event function Registrations

The income GL account recorded in the Trans table for event function DIST lines is determined in the following way:

- if there is an account defined in the Event function detail > Fees window that account is used, otherwise
- if the event function has a fund defined, that fund's default income account is used if it has one, otherwise
- if the event has an entity defined on the Define an event window, that entity's default income account is used, otherwise
- if there is a default meeting entity defined in the AR/Cash module, that entity's income account is used, otherwise
- the default income account for the default system entity is used.

Events Field Formats

This section provides the lists of fields in the main tables used by iMIS Events. You can reference these internal system field names from certain functions within iMIS:

- Custom Report Writer
- Ad Hoc Search

- Built-in letter-writing facility

You also can enter these fields in the Sort Fields area of certain event reports.

There are many tables within iMIS that are used to store data for various modules. iMIS Events interacts with several of these tables. This chapter outlines the most important tables/fields that you may need to reference.

Events key tables

The primary registration table is the Orders table, which is shared by many modules including iMIS Order Processing and iMIS Exhibition Management. In addition to the primary Orders table, there are a number of secondary Orders-related tables that contain registration data. The Orders and related tables (those whose names start with Order_) are linked by a common ORDER_NUMBER value for each registration.

The Events fields include the following tables and their descriptions:

Orders

Contains the primary name, address, status, and related information for each registrant you enter through the Events system. This table also contains summary information for the total fees charged to the registrant, the total payments applied to those fees, and the resulting balance.

Order_Badge

Contains the name, address, and company information that prints on registrant badges

Order Lines

Maintains the ticket quantity and fee information for the functions that registrants select

Order Meet

Contains the event code, registrant class, traveling arrangements and general-purpose notes, as well as information contained in user-defined fields

Order Payment

Maintains information on payments made after the primary payment

Meet_Master

Contains the definition for the overall event

Product

Contains the code, title, description, and default fees data for the individual functions

Product_Function

Maintains a wide variety of additional function definition elements, including function dates and times, projected and maximum attendance counts, CEU setup elements, and more

At the end of this chapter, there are record layouts for each field or data element in field position order for each of these main tables. Separate preliminary sections list the key registration fields as they appear on the registration windows.

A follow-up section lists other key fields that do not appear on any window, but that do play important roles (see Events Field Formats).

Accessing the events fields

Often when you want to access or reference a particular field, you can make your selection from a scrolling list. For example, the Ad Hoc Search facility lets you select from scrolling lists of tables and fields within the chosen table. In the following cases, however, no scrolling lists are available and you must enter field names in a text box, alone or imbedded in a character string:

- Identifying fields for merging in the Standard Letter System
- Specifying sort sequence for a report or other output
- Referencing additional fields to add to certain reports or output
- Setting up system areas
- Identifying programmers' statements that are available in certain functions for advanced requirements

Field syntax

When you enter data in a field, use the following form: Table_Name.FIELD_NAME

You must prefix the field name with the name of the table that maintains it, separated by a period. Capitalization is Caution! You must enter the table name with the first letter of each word capitalized, and the field all capitalized.

> **Note:** Note: Do not enter any spaces. Instead, enter underscores Shift+_ in place of spaces, for example, FULL_NAME.

> **Note:** For example, reference the first name, last name, and system-maintained full-name fields in the Orders (event registration) table as follows:

- For the first name, use: Orders.FIRST_NAME
- For the last name, use: Orders.LAST_NAME
- For the full name, use: Orders.FULL_NAME

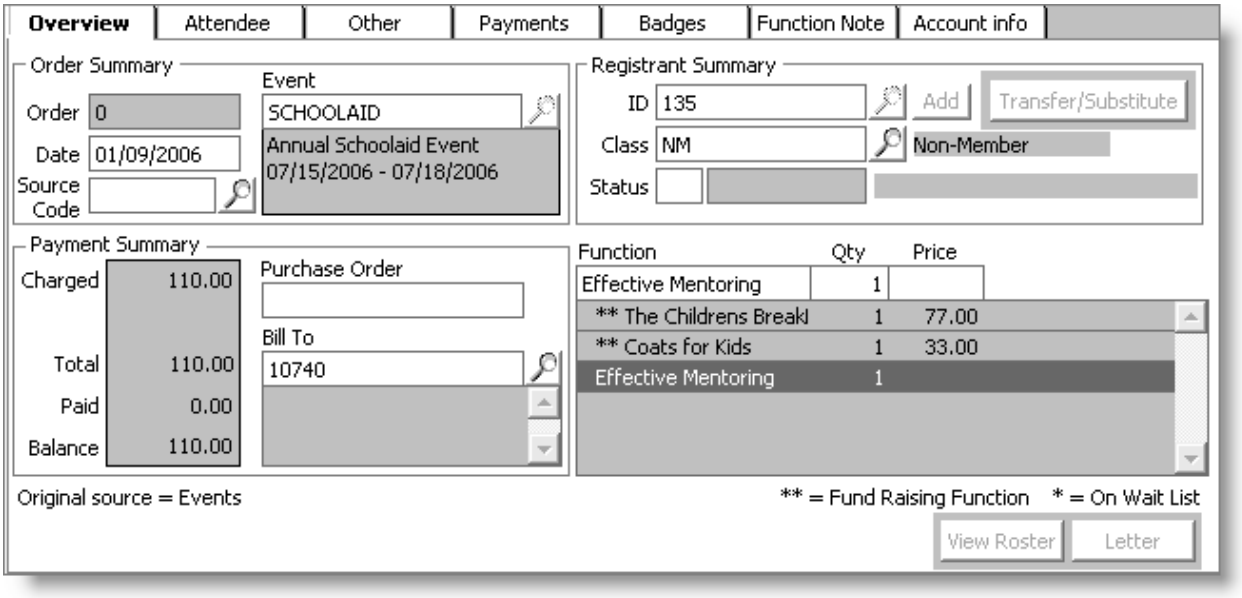
Events registration fields

The registration fields are spread across Orders and several Orders-related tables. Also, because the large Orders table serves many purposes for different iMIS modules, it contains fields that do not apply to iMIS Events directly. For these reasons, the following section reviews the fields that appear on various registration windows and indicate where those fields reside.

At the end of this window-by-window field outline is a section listing other key Events fields (see Events Field Formats). While they do not appear on any window, you may find these fields important for special-purpose sorting, searching, and reporting.

> **Note:** Note: The iMIS table layouts are not static; they may vary with product releases. Due to ongoing enhancement and reorganization of the iMIS product, the number of fields within a table, the field names, and the field types and/or lengths will change. Therefore, refer to the database schema documentation that accompanies new releases.

Fields: Register a customer window - Overview tab



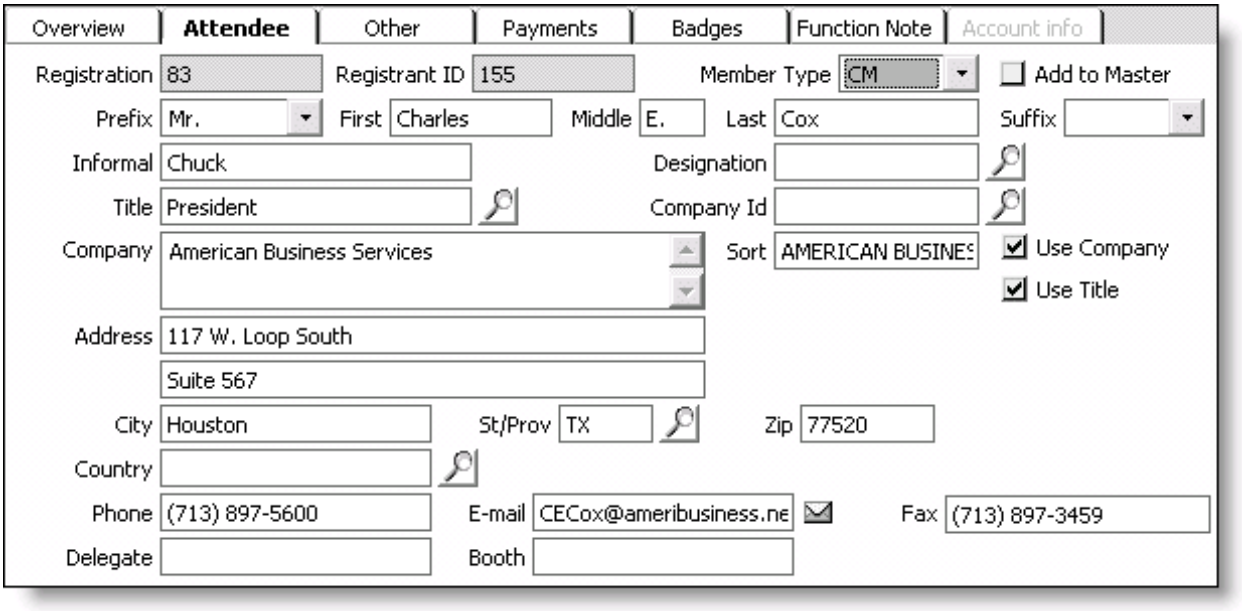
From Events, select Register a customer, and select the Overview tab

Data in the scrolling list of event functions is maintained within the Order_Lines table (each registered function is stored in a separate record). Most of the other fields are stored in the Orders table, except those noted.

Order: ORDER_NUMBER	Number	(Order Summary area) Sequential registrant order number assigned to each new order.
Event: Order_Meet.MEETING	Character 10	(Order Summary area) Event code
Date: ORDER_DATE	Date	(Order Summary area) Registration date, which affects assigned fee amounts
ID: ST_ID	Character 10	(Registrant Summary area) Registrant's customer ID
Class: Order_Meet.REGISTRANT_CLASS	Character 5	(Registrant Summary area) Code for broad category of registrants

Status: STATUS	Character	5	(Registrant Summary area) Code that remains blank unless a registrant is canceled normally (C) or canceled for purposes of a substitution or transfer (CT)
Charged: TOTAL_ CHARGES	Money	4 dp	(Payment Summary area) Grand total of all fees charged
Paid: TOTAL_ PAYMENTS	Money	4 dp	(Payment Summary area) Grand total of all payments applied to this order (both from payment window and Enter and edit cash receipts window)
Balance: BALANCE	Money	4 dp	(Payment Summary area) Net balance computed by subtracting payments from charges
Purchase Order: CUSTOMER_ REFERENCE	Character	40	(Payment Summary area) Reference number for the order
Bill To: BT_ID	Character	10	(Payment Summary area) Customer ID of party responsible for paying registrant's fees; may be the same as the registrant's customer ID

Fields: Register a customer window - Attendee tab



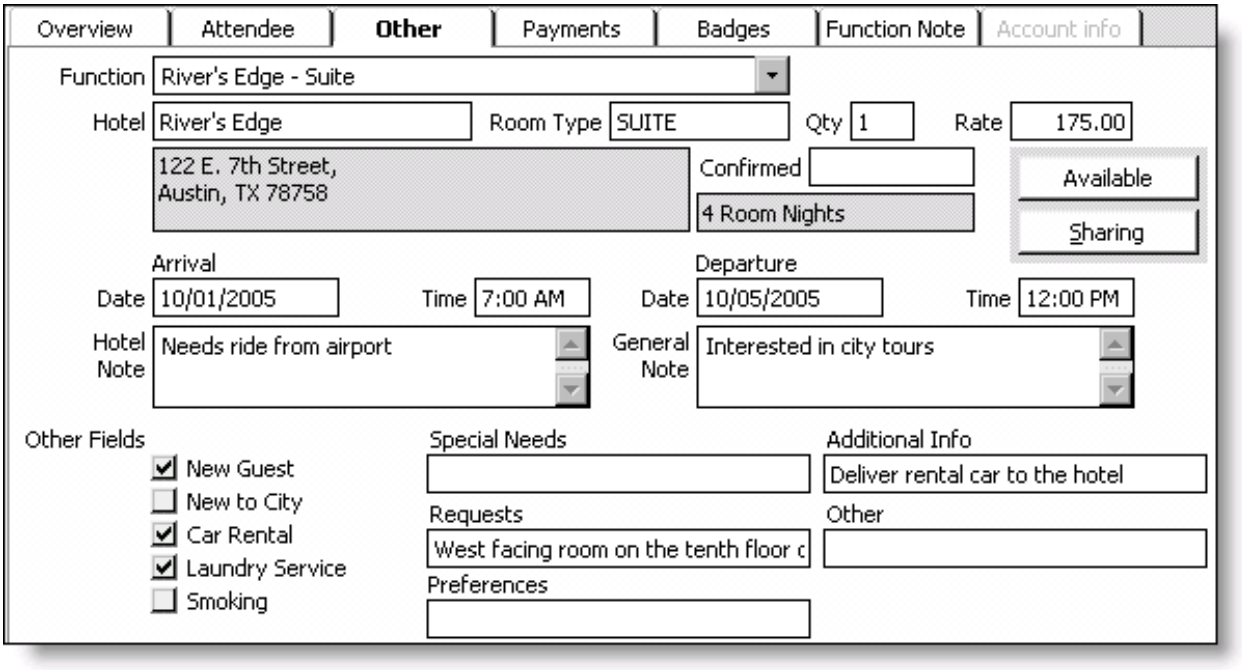
From Events, select Register a customer, and select the Attendee tab

All fields are stored in the Orders table, except those noted.

Registration: ORDER_ NUMBER	Number		Sequential registrant order number assigned to each new order
Registrant ID: ST_ID	Character	10	Customer File ID; blank if new registrant is not added to Master
Member Type: MEMBER_ TYPE	Character	5	Customer type
Prefix:PREFIX	Character	10	
First: FIRST_NAME	Character	20	
Middle:MIDDLE_NAME	Character	20	
Last: LAST_NAME	Character	30	
Suffix: SUFFIX	Character	10	
Informal:INFORMAL	Character	20	
Designations: DESIGNATION	Character	30	

Title:TITLE	Character	80
Company ID: CO_ID	Character	10
Company: COMPANY	Character	80
Sort: COMPANY_SORT	Character	30
Use Company: ST_USE_COMPANY	Checkbox	
Use Title: ST_USE_TITLE	Checkbox	
Address: ADDRESS_1	Character	40
ADDRESS_2	Character	40
City: CITY	Character	40
St/Prov: STATE_PROVINCE	Character	15
Zip: ZIP	Character	10
Country:COUNTRY	Character	25
Phone: PHONE	Character	25
Fax: FAX	Character	25
Email: EMAIL	Character	100
Delegate: Order_Meet.DELEGATE	Character	10
Booth: Order_Meet.BOOTH	Character	255

Fields: Register a customer window - Other tab



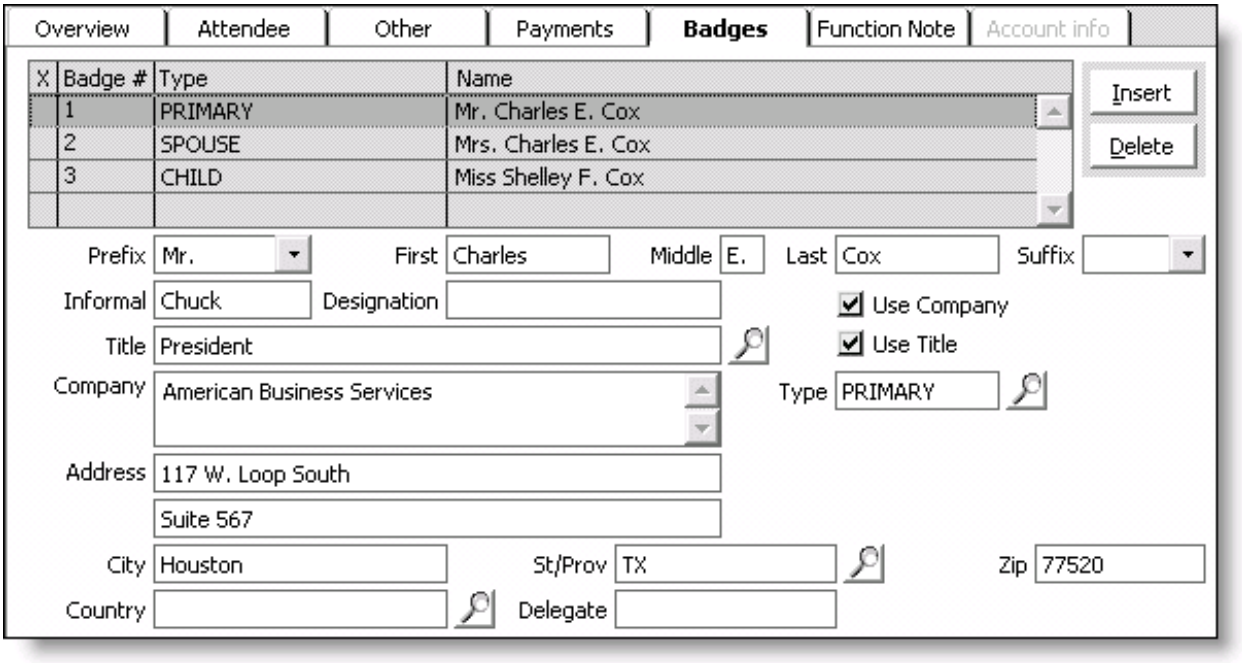
From Events, select Register a customer, and select the Other tab

All fields are stored in the Order_Meet table, except those noted.

Function: Order_Lines. DESCRIPTION	Character 255	
Hotel: HOTEL		Display only (data stored in Meet_Hotel.COMPANY)
Room Type: ROOM_TYPE		Display only (data stored in Product.Group_2)
Quantity: Order_Lines. QUANTITY_ORDERED	Number	
Rate: Order_Lines. UNIT_PRICE	Money 4dp	
Occup: Order_Lines. LOT_SERIAL		
Confirmed: Order_Lines.	Date	

DATE_CONFIRMED			
Arrival Date: ARRIVAL	Date & Time	8	
Arrival Time: ARRIVAL_TIME	Date & Time	8	
Departure Date: DEPARTURE	Date & Time	8	
Departure Time: DEPARTURE_TIME	Date & Time	8	
Hotel Note: Order_Lines.NOTE	Character	255	
General Note: Orders.NOTES	Character	255	
?: UF_1	Checkbox		Appears with custom label only if activated in the Set up module window
?: UF_2	Checkbox		"
?: UF_3	Checkbox		"
?: UF_4	Checkbox		"
?: UF_5	Checkbox		"
?: UF_6	Character	100	"
?: UF_7	Character	100	"
?: UF_8	Character	100	"
?: UF_9	Character	100	"
?: UF_10	Character	100	"

Fields: Register a customer window - Badges tab



From Events, select Register a customer, and select the Badges tab

All fields are stored in the Order_Badge table.

Prefix:PREFIX	Character	10
First:FIRST_NAME	Character	20
Middle:MIDDLE_NAME	Character	20
Last:LAST_NAME	Character	30
Suffix:SUFFIX	Character	10
Informal:INFORMAL	Character	20
Designation:DESIGNATION	Character	20
Title:TITLE	Character	80
Company:COMPANY	Character	80
Use Company: ST_USE_COMPANY	Checkbox	
Use Title: ST_USE_TITLE	Checkbox	
Type:BADGE_TYPE	Character	10

Address:ADDRESS_1	Character	40
ADDRESS_2	Character	40
City:CITY	Character	40
StProv:STATE_PROVINCE	Character	15
ZIp:ZIP	Character	10
Country:COUNTRY	Character	20
Delegate:DELEGATE	Character	10

Events Additional Features

Continuing Education

iMIS Continuing Education (CEU) provides many advanced features:

- Defining a program type and credit category for each educational program
- Awarding continuing education credits to each attendee according to either automatic program defaults or manually-entered overrides
- Recording attendance rosters
- Printing continuing education completion certificates
- Retaining long-term continuing education records for documentation purposes, transcript requests, and inquiry and data analysis

The Customer Setup - Advanced window enables you to customize the continuing education program name and the units name in order to meet the needs of your organization. For example, in the healthcare profession, Continuing Medical Education (CME) or Continuing Nursing Education (CNE) could be used instead of Continuing Education Units (CEU).

CEU system setup

The Event Function Definition - CEU window enables you to assign continuing education units for a selected function through two fields, CEU Type and Hours/Points.

To customize the CEU field prompts

1. From Customers, select Set up module > General to open the Set up general options window.
2. Click Advanced to open the Customer Setup - Advanced window.
3. Click Edit.
4. Enter an appropriate field name that represents your CEU program in the CEU Name field. For example, enter CME, CLE, or CPE.
5. Enter a term for the units awarded (for example, hours or credits) in the CEU Units Name field.
6. Click Save.

   Note: For iMIS to create activities for the label you enter in the CEU Name field, you must create an activity type with the same name using the Customers > Set up activity types window.

   Note: These assigned field names will appear on all CEU-related windows and reports. They also will be mapped to the Activity.TYPE field when continuing education activity details are generated at the close of an event.

   CEU record keeping

   With iMIS Continuing Education, long-term CEU activity or history records are created when an event is closed. The module produces one Continuing Education activity record for each course for which the registrant received credit. The combined event and course code, course description, CEU credit type, and number of credits earned is recorded for these activity records.

   You can close an event any time after registration activity is complete and attendance has been marked.

Speaker Evaluation

iMIS Speaker Evaluation enables you to evaluate and rate the individuals who speak at your events. The compiled evaluation data is stored in numeric fields, and you can average the data to determine a speaker's overall rating. You also have the ability to print a

report based on the evaluation data. After an event is closed, iMIS creates activity records that contain the evaluation data for the speaker.

The functions provided by iMIS Speaker Evaluation include the following:

- Setting up an activity type for your speaker evaluations
- Defining speaker rating groups and criteria
- Entering speaker evaluation data by function
- Generating speaker evaluation reports upon event completion

Defining speakers and evaluation criteria

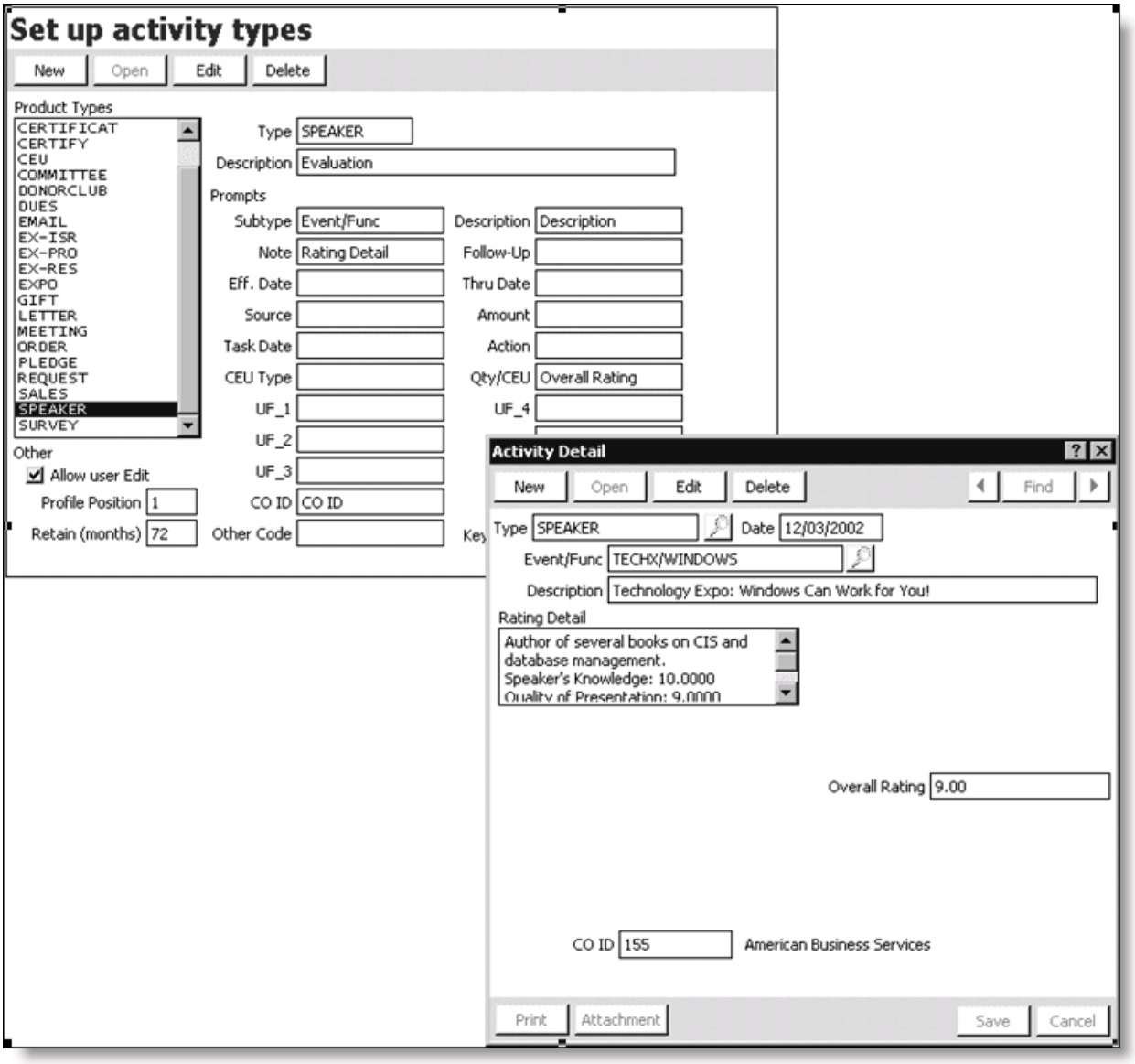
Before you can evaluate a speaker, you first must define the speaker activity type and the speaker evaluation criteria.

To set up a speaker activity type

1. From Customers, select Set up module> Activity types to open the Set up activity types window.
2. Click New.
3. Enter SPEAKER in the Type field.
4. Enter a description of the activity in the Description field (for example, Evaluation).
5. Enter a prompt for the Subtype (for example, Meet/Func).
6. Enter a prompt for the Description (for example, Description).
7. Enter a prompt for the note area in the Note field (for example, Rating Detail).
8. Enter a prompt for the overall or average rating in the Qty/CEU field (for example, Overall Rating).

   Note: iMIS will automatically populate the rating for any line item within the detail section that contains the word “average” or “overall” in its description. However, you first must enter the prompt in the Qty/CEU field for the field to display on the Activity Detail window.

9. Enter a prompt in the CO ID field (for example, CO ID).
10. Under Other, enable or disable the Allow user Edit option.
11. Enter a value in the Profile Position field.
12. Enter a value in the Retain (months) field.
13. Click Save. The values defined for the activity type on the Set up activity types window display on a speaker's Activity Detail window.



How many speaker groups?

In most cases, you will organize your evaluation questions into groups, and you will create one group for each speaker. The groups will contain detailed records of the ratings, questions, comments, and other evaluation criteria for the speakers belonging to them.

Set up a sufficient number of speaker groups to accommodate the maximum number of speakers who may participate and who you may want to rate for any event function. For example, if five speakers will be presenting at a single function and you want to rate them individually, then you will need five speaker groups.

In addition to evaluating speakers, you also can set up groups for evaluating non-speaker categories. You could rate the facilities or report statistics on the demographics of the attendees. These additional groups will print on the speaker evaluation report.

> **Note:** Note: Long-term activity records can be created only for groups that are linked to customer IDs through the Field 1 Usage field on the Set up event resources window.

To enter rating groups and evaluation criteria

Set up your evaluation criteria to match each question that you ask on any of your speaker/event evaluation questionnaires.

1. From Events, select Set up tables > Event resources to open the Set up event resources window. See Defining Event Standard Resources for details on using this window.
2. Click New.
3. Override the default in the Type field, and enter SPEAKER to create the speaker group.
4. Enter the name (or number) for the Group (for example, SPKER1).
5. Enter a Title for the group (for example, Speaker One).
6. Enter the Group Sort Order to control the order in which the groups display for each Type. Entering numerically lower numbers will display the group ahead of those groups with higher numbers.
7. Under Field 1 Usage, select the Id option.

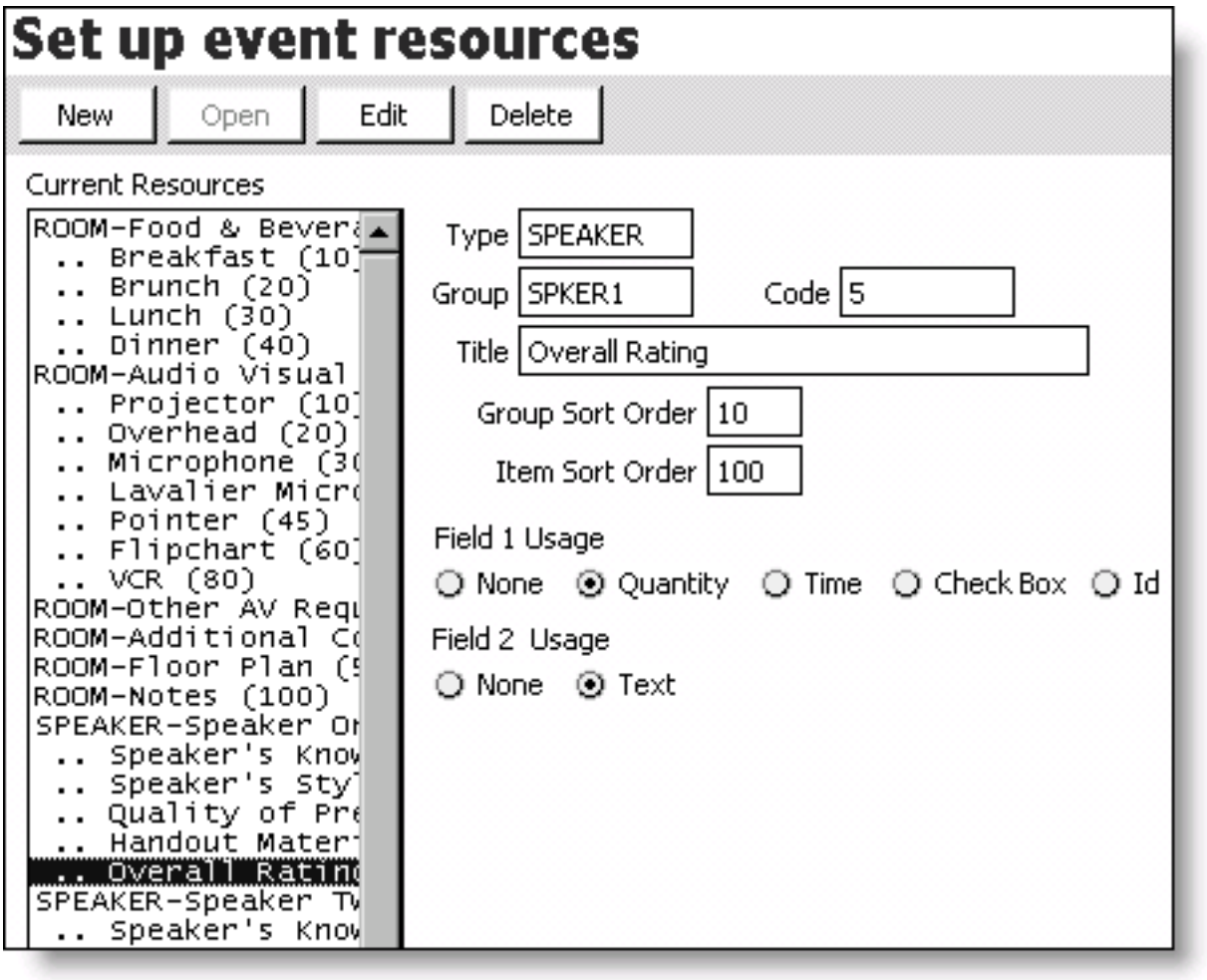
8. (optional) If you want to enter comments in addition to the evaluation score, select the Text option under Field 2 Usage.
9. Click Save.
10. Click New to enter the evaluation criteria for each group.
11. Enter the group Type for which you are entering evaluation criteria (for example, SPEAKER). This is the same Type entered in Step 3.
12. Enter the Group name for which you are entering evaluation criteria (for example, SPKER1). This is the same Group entered in Step 4.
13. Enter a Code for the evaluation criterion (for example, 2).
14. Enter a unique Title for the criterion you want to track (for example, Quality of Presentation).
15. Enter the same Group Sort Order entered for the group in Step 6.
16. Enter the Item Sort Order to control the order in which the evaluation criteria display for each group. Entering numerically lower numbers will display the criterion ahead of those criteria with higher numbers.
17. Select the Quantity option under Field 1 Usage (if the criterion is to have a numerical evaluation score). Long-term activity records can be created only for groups that are linked to customer IDs through the Field 1 Usage field.
18. (optional) If you want to enter comments in addition to the evaluation score, select the Text option under Field 2 Usage.
19. Click Save after entering each evaluation criterion.

Speaker resources example

In this example, two speaker groups have been set up and labeled as SPKER1 and SPKER2. For each speaker group, evaluation criteria have been set up to record the ratings and any text comments. The evaluation criteria include Speaker's Knowledge, Speaker's Style, Quality of Presentation, Handout Materials, and Overall Rating. These criteria use the Quantity option under Field 1 Usage to allow entering averages with two

decimal places. We chose Text under Field 2 Usage so we could enter comments for the criteria ratings. These criteria link to their common group, but each criterion has a unique code.

The final category, Overall Rating, records our calculated average of the speaker's ratings. In our previous example (“To set up a speaker activity type”), we entered Overall Rating as the prompt that displays on the Activity Detail window for the Qty/CEU field. Because this record contains the word “overall,” its rating will be placed in the Qty/CEU field of the activity record so it can be used for analysis.



Example of the Set up event resources window

Evaluating speakers

Enter any evaluation data that you want to record for a speaker's activity record before closing an event. The data used to generate the activity records consists of the evaluation criteria within the speaker's group. This evaluation criteria is defined on the Event Function Definition - Speakers window and is indented underneath the group's heading.

You can enter several speaker evaluations for a given function, one for each speaker resource group defined on the Set up event resources window (from Events, select Set up tables > Event resources).

To enter evaluation data

Before you can evaluate a speaker, you first must define the speaker activity type and the speaker evaluation criteria. See Defining Speakers and Evaluation Criteria for more.

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select the event function for which you want to enter evaluation data, and click Edit to open the Event Function Detail window.
4. Click More, and select Speakers to open the Event Function Definition - Speakers window.
5. From the list, select the speaker group for which you want to enter evaluation data.
6. Enter the Id of the speaker (use the lookup icon to search for an ID).
7. In the text box below the Id field, enter any identifying information, such as a presentation title.
8. From the list, select the first evaluation criterion.
9. In the Qty field, enter the numeric score you calculated from the evaluations (record digits with up to two decimal places).
10. In the text box below the Qty field, enter any additional comments.

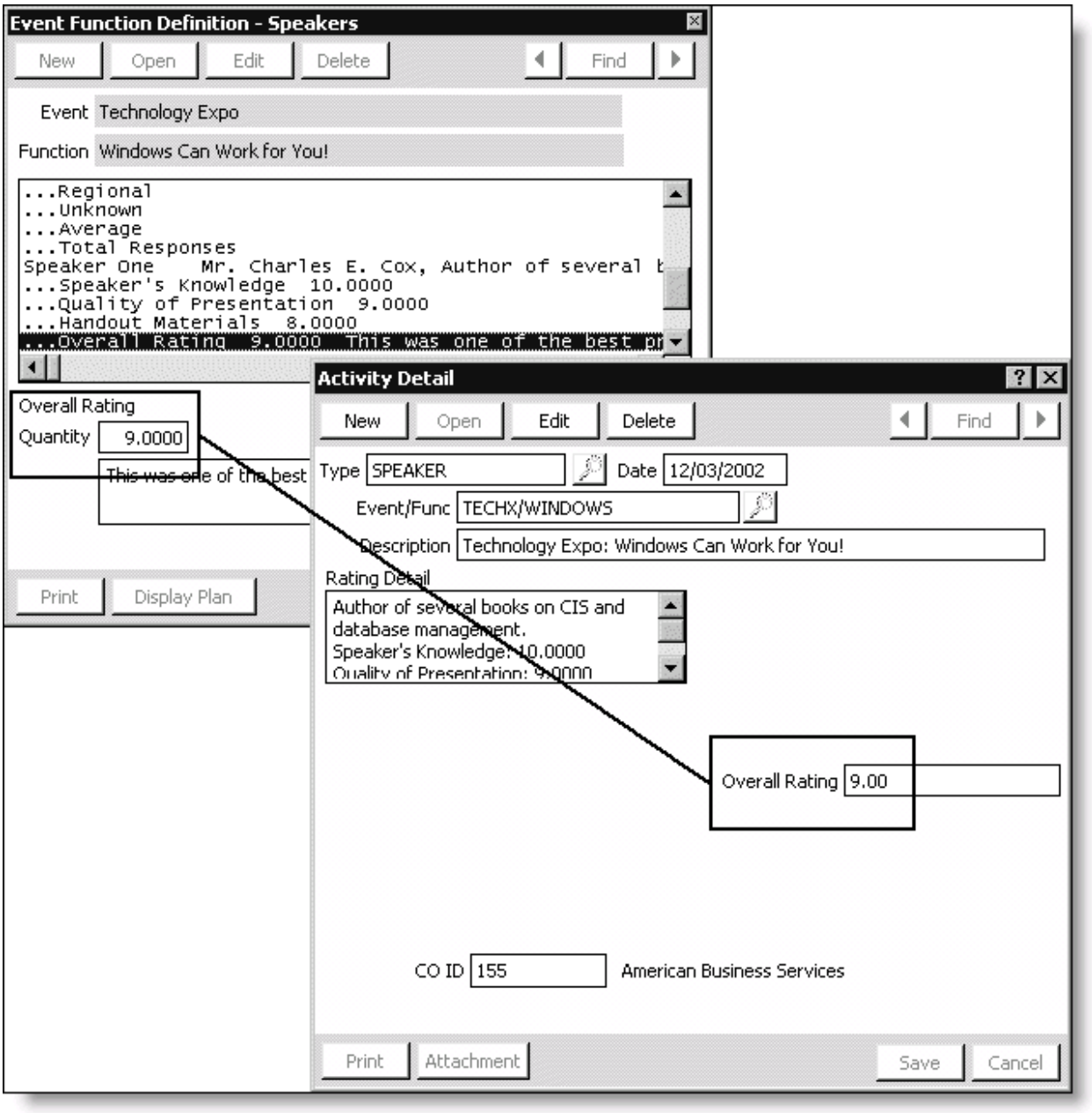
11. Repeat the process for the remaining group evaluation criteria.
12. Click Save.

Speaker activity records

Activity records are created for speakers when an event is closed. The data used to generate the activity records consists of the evaluation criteria defined on the Event Function Definition - Speakers window.

Because the Overall Rating record contains the word “overall,” its Quantity, as defined for the speaker on the Event Function Definition - Speakers window, will populate the Qty/CEU field (Overall Rating prompt) on the Activity Detail window for future analysis.

> **Note:** Note: The calculation of the Overall Rating is not performed automatically for a speaker's activity record. You must define a value (Quantity) for the Overall Rating on the Event Function Definition - Speakers window for it to be recorded for a speaker's activity record and display on the Activity Detail window.



Example of a speaker's Overall Rating recorded on the Event Function Definition - Speakers window and displayed on the speaker's Activity Detail window

Hotel Room Block Management

iMIS Hotel Room Block Management is an extension of iMIS Events and enables you to book hotel room blocks quickly and efficiently for specific events.

This section provides information on the following topics:

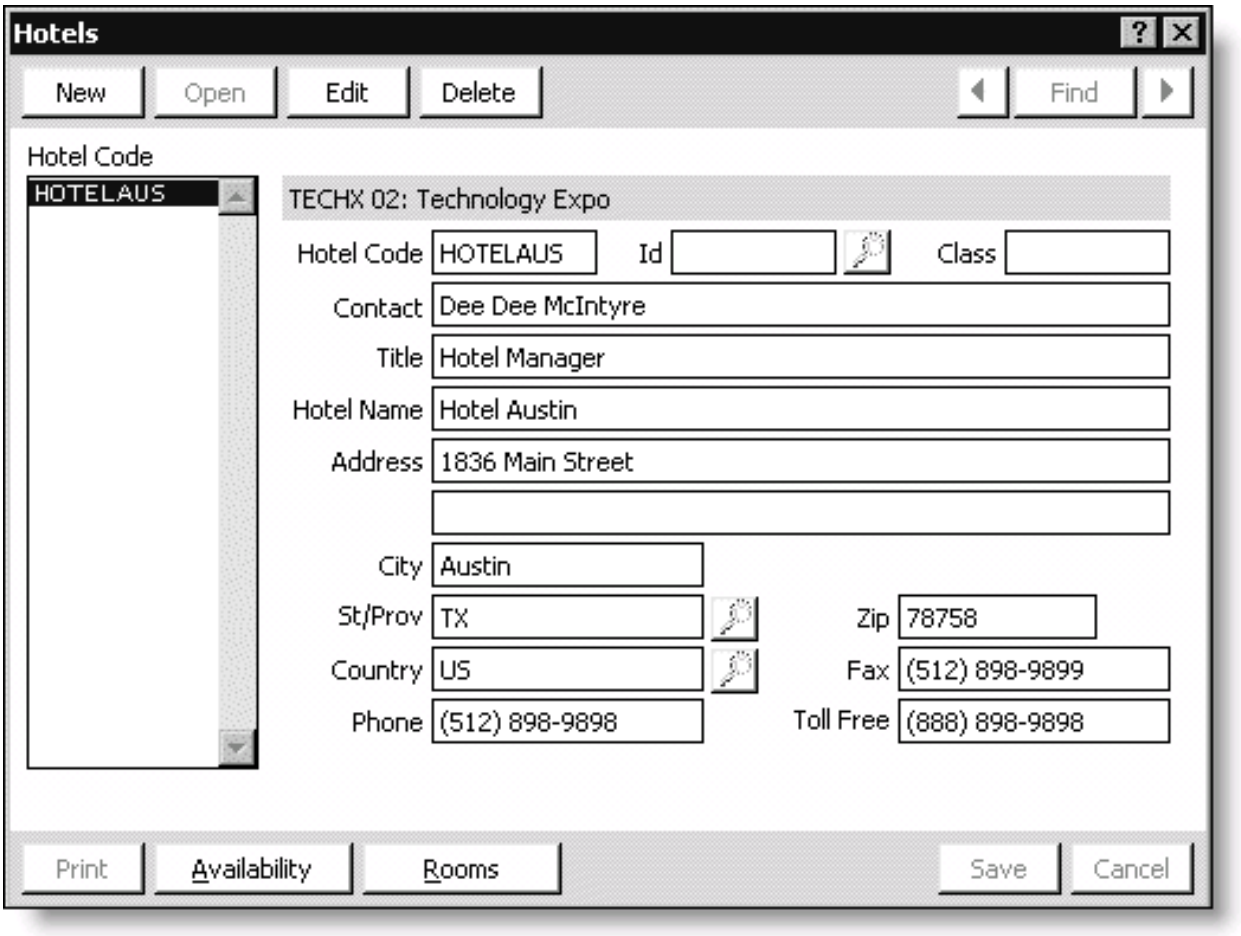
- Defining hotels and room availability for your events
- Booking rooms through the event registration process
- Setting up rooms for registrants to share
- Canceling reservations and overbooking rooms
- Generating rosters and reports for distribution to hotel personnel and other associated services

  The rosters included in your Standard Reports provide a list of persons assigned to each room per night, so hotel personnel can manage the reservations according to their needs and policies. Additional output and inquiry information helps event managers track room reservations and room availability.

  Defining hotels

  You will need to create a list of available hotels for each event. If you routinely use the same hotels for your events, set up an ID for each hotel. This will allow you to generate hotel information automatically when setting up future events. If no ID exists for a hotel, you can enter the hotel contact and address information directly through the Hotels window.

Hotels window



From Events, select Define an event, double-click an event, and click Hotels

Hotel Code

Lists defined hotel codes.

Event

(read only) Displays the event code and event name.

Hotel Code

Specifies a code for the hotel.

Id

Specifies the hotel's ID (applicable only if you created a record for the hotel in the Manage customers window).

Class

Specifies a class for the hotel.

Contact

Specifies the contact for the hotel.

Title

Specifies the hotel contact's title.

Hotel Name, address fields

Specifies the name and address of the hotel.

Availability button

Opens the Hotel Availability window used for determining room availability.

Rooms button

Opens the Room Types window used for setting up hotel rooms.

To enter hotel information

1. From Events, select Define an event to open the Define an event window.
2. Double-click the event for which you need to set up hotel rooms to open the event in the Define an event window.
3. Click Hotels to open the Hotels window.
4. Click New.
5. Enter the hotel information:

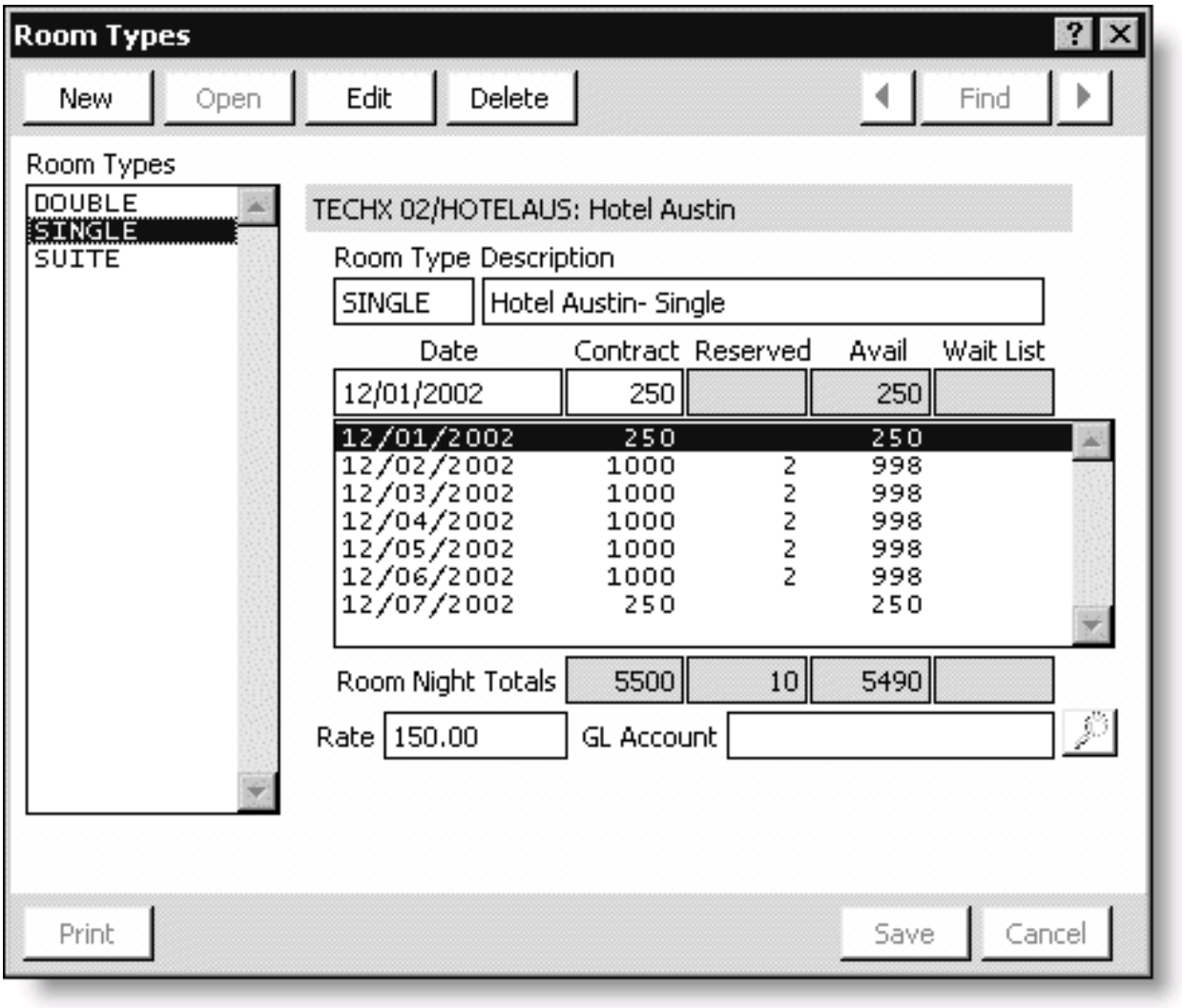
- If you created a record for the hotel in the Manage customers window, enter the Id for the hotel to populate the appropriate fields automatically. If you set up a specific customer type for your hotels, search by customer type to locate those records.

Note: To locate your hotel records easily, maintain a customer type specifically for them.

- If the hotel's record links to an associated customer record, the contact name, hotel name, address, and telephone data automatically populate the appropriate fields on the Hotels window.
- If you have not created a record for the hotel, manually enter the hotel's information.

6. Click Save.
7. Click New for each additional hotel you want to define, and then repeat the process.

Room Types window



From Events, select Define an event, double-click an event, click Hotels, and click Rooms

Room Types

Lists defined room types.

Event

(read only) Displays the event code and name of the event.

Room Type

Specifies a code for the room type.

Description

Specifies a description for the room type.

Date

Specifies a reservation date.

Contract

Specifies the number of hotel rooms contracted for the event.

Reserved

(read only) Displays the number of hotel rooms that have been reserved.

Avail

(read only) Displays the number of contracted hotel rooms that have not been reserved and are still available.

Wait List

(read only) Displays the number of registrants on the wait list for rooms.

Room Nights

(read only) Displays a summary of the number of Contract, Reserved, Avail, and Wait List rooms for each Date.

Room Night Totals

(read only) Displays the total number of Contract, Reserved, Avail, and Wait List rooms.

Rate

Specifies the daily hotel room rate.

GL Account

Specifies the GL account for the hotel charges (use the lookup icon to search for an account number).

To define hotel room inventory

1. From Events, select Define an event to open the Define an event window.
2. Double-click the event for which you need to set up hotel rooms to open the event in the Define an event window.
3. Click Hotels to open the Hotels window.
4. Select the hotel for which you need to set up a room inventory.
5. Click Rooms to open the Room Types window.
6. Click New.
7. Enter a code for the Room Type (for example, DOUBLE or SINGLE).
8. Accept the default Description, or enter another Description for the room type.

   For each reservation date, enter the date in the Date field and the number of rooms needed in the Contract field. To add dates, select the empty line directly below the last table entry, and then enter Date and Contract information for that date.

   Note: The Reserved quantity updates automatically as rooms are booked. The Avail quantity equals the contracted quantity minus the number of room nights reserved (available = contracted - reserved).
9. (optional) If you also will be billing registrants for their hotel room reservations, enter the amount (per night) in the Rate field for each room type and the GL account into which the charges will be booked. This GL account may represent a liability account (for example, payable to the hotel) or an income account.

10. If VAT is applicable to the room rate, enable the Taxable option and enter the appropriate tax code.
11. Click Save.
12. To define additional room types, click New, and repeat the process.

Managing reservations

Use the Register a customer window's Other tab to enter and cancel hotel reservations. Click Available to view hotel availability.

Use the Register a customer window's Other> Sharing tab to enable the room sharing option.

To enter hotel reservations

Hotel reservations are entered through the Register a customer window's Other tab.

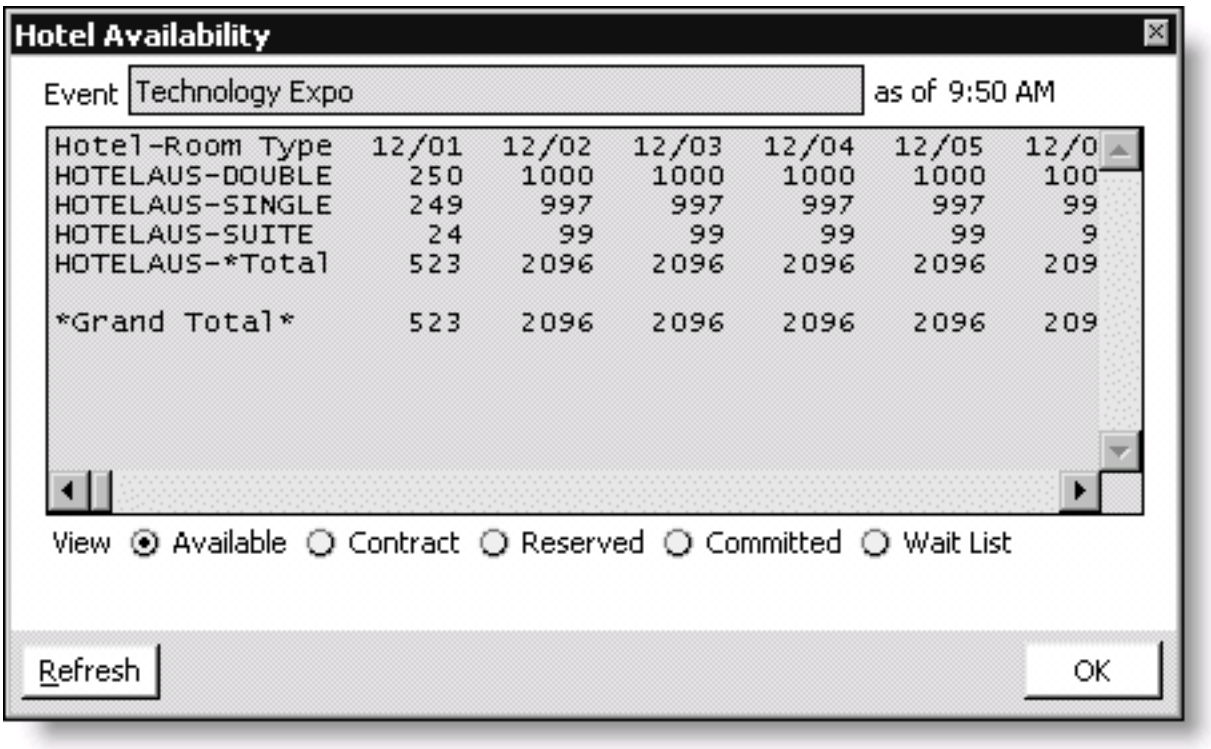
1. From Events, select Register a customer to open the Register a customer window.
2. Click Open or Find.
3. Enter the Event code (use the lookup icon to search for the event), and Tab to the registrant ID field.
4. Enter the registrant's ID (use the lookup icon to search for the registrant) and press Tab. The customer's current registration information displays in the Register a customer window's Other tab.
5. Click Edit.
6. Select the Other tab.
7. To reserve a hotel room, select a hotel room from the Function drop-down list.
8. Enter a non-zero number in the Qty field (defaults to 1) for the number of rooms needed.

   Note: If your reservation is for multiple-nights, treat the reservation as a single unit. For example, a hotel reservation for four nights would display with a Qty of 1 and Room Nights of 4. The hotel reservation lists as a single order with the cost calculated for each reserved night.

9. Enter the room Rate.
10. Enter the Confirmed date of the reservation.
11. Enter dates in the Arrival and Departure fields. The number of Room Nights calculates and displays.

    iMIS alerts you if the Arrival date is equal to or later than the Departure date or if you book a room for a date that is sold-out or undefined in the Room Types window. However, iMIS will allow you to overbook and reserve a sold-out room. Click Available to open the Hotel Availability window to determine hotel room availability.
12. (optional) Enter any other relevant registrant information that the hotel will need in the Note and Other Fields. The Other Fields are user-defined fields and only display if they have been set up in the Set up module window (from Events, select Set up module).
13. Click Save.

    Hotel Availability window



From Events, select Register a customer, select the Other tab, and click Available

Event

(read only) Displays the name of the event.

Time

(read only) Displays the time the window was last updated. Selecting Refresh updates both the window and the time.

Hotel Rooms

(read only) Displays the available hotel rooms by room type.

View

- Available - Enable to view the total number of rooms available.
- Contract - Enable to view the total number of rooms contracted for the event.
- Reserved - Enable to view the total number of rooms that have been reserved.
- Committed - Enable to view the total number of rooms for which registrants have committed their registrations. (Committed is the amount of the Contract “committed” to open orders. The Committed quantity mirrors the Reserved quantity but cannot exceed the Contract quantity. The difference between the Reserved and Committed quantities equals the backorder quantity.)
- Wait List - Enable to view the total number of registrants on a wait list for the rooms.

Refresh button

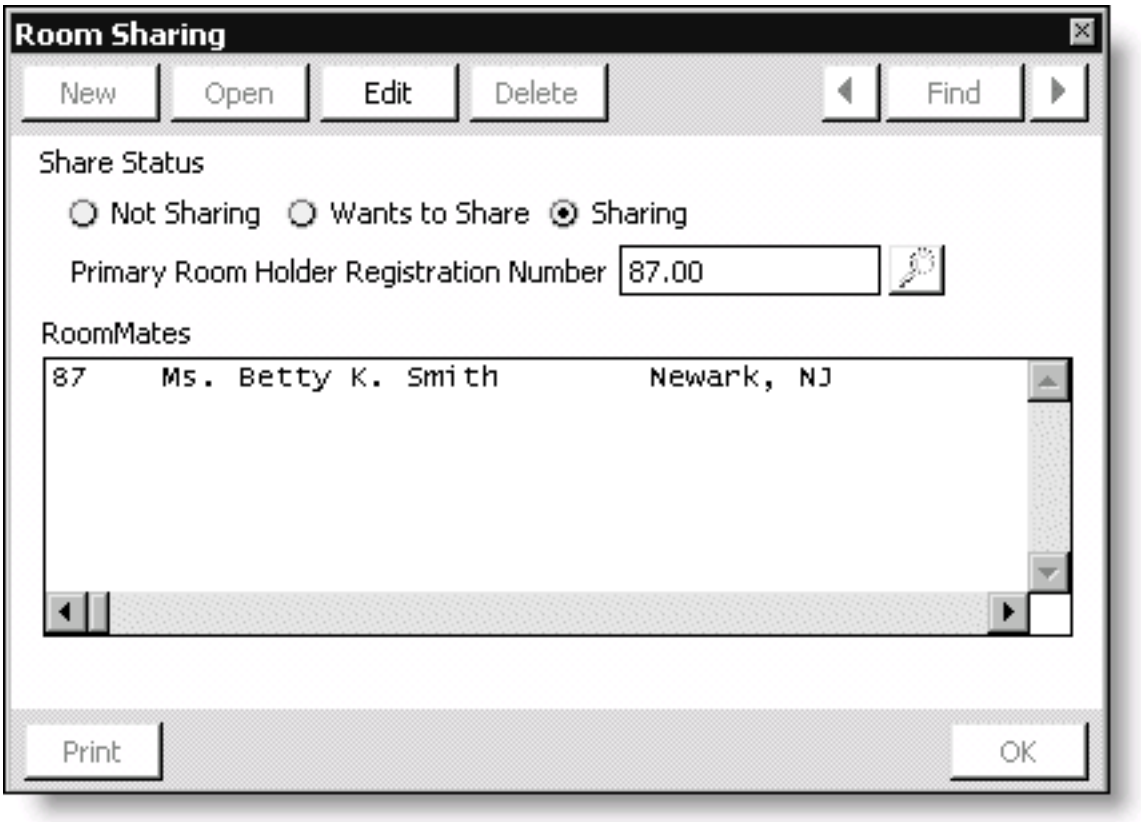
Click to update the data.

To determine hotel room availability

1. From Events, select Register a customer to open the Register a customer window.
2. Click Open or Find.
3. Enter the Event code (use the lookup icon to search for the event).

4. Enter the registrant's ID (use the lookup icon to search for the registrant), and press Tab. The customer's current registration information displays on the Register a customer window's Overview tab.
5. Click Edit.
6. Select the Other tab.
7. Click Available to open the Hotel Availability window.
8. Select the View option to narrow your search.
9. Click Refresh.
10. Click OK.

Room Sharing window



From Events, select Register a customer, select the Other tab, and click Sharing

Share Status

- Not Sharing - Enable if the registrant is not sharing a room.
- Wants to Share - Enable to indicate that the registrant wants to share a room with another registrant.
- Sharing - Enable to indicate that the registrant is sharing a room with another registrant.

  Primary Room Holder Registration Number

  Specifies primary registrant's registration number. Use the lookup icon to search for the registration number.

  RoomMates

  Lists all of the registrant's roommates.

  To use room sharing

1. Register the primary registrant for a room.
2. From Events, select Register a customer to open the Register a customer window.
3. Open the record of the registrant who will share the room with the primary registrant.
4. Click Edit.
5. Select the Other tab.
6. Click Sharing to open the Room Sharing window.
7. Enable the Sharing option.
8. Enter the Primary Room Holder Registration Number (use the lookup icon to locate the primary registrant).
9. Double-click on the roommate's name. The registration number of the primary registrant will display, and the primary registrant's name will display in the RoomMates field.
10. Click Save.

When you return to the Register a customer window's Other tab, note that nothing displays in the function list for hotels. The room only appears in the primary room holder's function list because it is a shared room.

Generate the Hotel Room Roster Report to see the primary room holder's functions, qty/-price information, the other registrant who is sharing the room, and the primary registrant's arrival/departure dates (if entered).

To cancel a reservation

To cancel a room reservation, simply edit the registration and change the room quantity of the canceled reservation to zero.

Cancel and change rooms manually (rather than allowing iMIS to automatically change when a registrant changes a room) so registrants can register for two or more room types.

To overbook rooms

An overbooked room will display as an amount in parenthesis (1) in the Hotel Room Bookings Availability Report. The Reserved Rooms inventory will reflect this also by adding the quantity to its total.

Each time you overbook, the quantity is added to all of the totals just as with a regular booking, except that the Availability number appears in parentheses to signify a negative number. The Contract totals will be less than the reserved quantity for this room type.

Exhibitions

See AR/Cash: Deferred Income for how to defer dues/subscriptions income and events/exhibition/exposition income.

> **Note:** Note: To authorize credit card payments for Events, Exhibition, Exposition, and Orders, enter them through Service Central > Enter and edit payments (if licensed for SERVCEN) or AR/Cash > Cash receipts (if licensed for CCAUTH).

Printing individual reports and reviewing rosters

iMISEvents contains reports that are specific to planning and administering events. You can run reports from the Generate reports window (from Events, select Generate reports) as well as generate several individual reports by selecting one of the following options on the Register a customer window's Overview tab:

- Print - Opens the Select Report window and generate one of these individual reports: Confirmation, Invoice, Ticket, or Badge.
- View Roster - Opens the Event Roster window and view all of an event's registrants.
- Letter - Opens the Meeting Standard Letters window (Letter Text window if using Quick Letter) and the event letter subsystem. You can use an existing standard letter or compose a new letter specifically for an individual registrant.

To set the report destination

Reports print to the destination you select, and Printer is the default destination. To change the report destination to Screen, select File> Report Destination> Screen.

To print individual reports from the Register a customer window's Overview tab

1. From Events, select Register a customer to open the Register a customer window.
2. Find an event registration.
3. Select File> Report Destination, and select the output destination.
4. Click Print to open the Select Report window.
5. Select a Report Option:

- Confirmation
- Invoice

- Ticket
- Badge

6. Click Print to send the selected Report Option to the current output destination.

To view an event roster

1. From Events, select Register a customer to open the Register a customer window.
2. Find an event registration.
3. Click View Roster to open the Event Roster window.
4. Double-click a registrant's name on the Event Roster window to view and open their registration information on the Register a customer window.

Viewing a registrant's account information

iMIS updates the Transaction Ledger after you apply a payment. You can view the transaction details for a particular order on the Register a customer window's Account info tab.

To view a registrant's account information

1. From Events, select Register a customer to open the Register a customer window.
2. Find an event registration.
3. Select the Account info tab. This tab displays the transaction details for the selected registrant's order, including invoice number charges and the balance.

Substituting registrants

Times may exist when a registrant cannot attend a particular event because of a conflict or some other unforeseen occurrence. However, another registrant may want to take

over the order purchased by the first registrant. This can be accomplished easily in the iMIS Events module.

To substitute registrants

1. From Events, select Register a customer to open the Register a customer window.
2. Find the event registration for which you want to substitute registrants.
3. Click Transfer/Substitute.
4. Your cursor is now in the Event field. Tab to the ID field and enter the substitute registrant's ID (select the Find icon to search for an ID). Notice that when you pressed Tab, the Bill To and Function field information disappeared. When you enter the substitute registrant ID, the Bill To and Function fields are populated with the new information.
5. Click Save.

   Note: CT displays on the event roster by the name of the original registrant, indicating that the registrant's order was canceled and transferred.

Transferring a registrant to another event

When a registrant cannot attend a particular event because of a conflict or unforeseen occurrence, you can transfer the registrant to another event.

To transfer a registrant to another event

1. From Events, select Register a customer to open the Register a customer window.
2. Find the event registration from which you want to transfer the registrant.
3. Click Transfer/Substitute.
4. Your cursor is now in the Event field. Enter the event code to which you want to transfer

the registrant (select the Find icon to search for an event).

5. Click Save.

   Note: CT displays on the original event roster by the name of the registrant, indicating that the registrant's order was canceled, then transferred to another event.

   To transfer a registrant back to the original event

   If a registrant registers for an event, transfers to another event, and then decides to transfer back to the original event, cancel the second event registration and edit the original event registration to remove the Canceled status. Any payments made towards the second event will have to be applied to the original event.

1. From Events, select Register a customer to open the Register a customer window.
2. Find the event registration from which you want to transfer the registrant.
3. Click Delete.
4. Click Yes to cancel the registration.
5. Click Open or Find.
6. Enter the Event code of the original event to which the registrant wants to transfer.
7. Enter the registrant's ID.
8. Click Save.
9. Click Edit.
10. Click Yes to un-cancel the registration.
11. Click Save.
12. Find any payment credits for the registrant, and apply the credit to the open, unpaid registration. Refer to the following two procedures:

To use the *Tab method to find open credit items

1. From A/R Cash, select Enter and edit transactions> Cash receipts to open the Enter and edit cash receipts window.
2. Click New.
3. Enter the ID number of the registrant in the Id field to locate their record.
4. Press Tab to populate the window with the registrant's information.
5. Enter * in the Check/CC field.
6. Press Tab to open the Select Open Payments window and find any open credits for the individual.

To apply a prepaid amount to an open item

When a registrant prepays for an event and then transfers to another event, use this feature to apply the payment credit for the cancelled event to the new, open event.

1. From A/R Cash, select Enter and edit transactions> Cash receipts to open the Enter and edit cash receipts window.
2. Click New.
3. Enter the ID number of the registrant in the Id field to locate their record.
4. Press Tab to populate the window with the registrant's information.
5. Select the event with the credit (negative) Balance.
6. Enter a negative amount in the Amt Paid field.
7. Select the event with the debit (zero or positive) Balance.
8. Enter a positive amount in the Amt Paid field equal to the amount entered in Step 6. For example, enter 125.00 as opposed to
   -125.00.
9. Click Save. The prepaid amount will be applied to the open event.

Invoice	Date	Description	Balance	Amt Paid
R89	03/28/2002	Fall Conference	-125.00	0.00
		(PrePay - New)	0.00	0.00
R87	03/20/2002	Technology Expo	640.00	0.00
R89	03/28/2002	Fall Conference	-125.00	0.00
11	01/25/2001	Order 53	0.00	0.00
R88	03/20/2002	Annual Conference	0.00	0.00

Managing wait lists

Wait listing is a strategy that helps you manage events by allowing registrants the opportunity to sign up for currently unavailable functions. In order to use wait listing, the Enable Function Wait Lists option must be enabled on the Event System Preferences window (from Events, select Set up module, and click Preferences).

The wait list option is triggered when function registrations exceed a function's maximum attendance limit. A message displays when a function's maximum attendance limit is exceeded, allowing you to add registrants to a wait list.

When a function becomes available, you have the option of manually choosing attendees on the wait list. You must enable the Choose from Wait List for opening option on the Event System Preferences window if you want to select registrants manually. If this option is not enabled, iMIS automatically selects the registrants in chronological order from the wait list and registers them for the function when and if it becomes available.

Functions become available when one of the following occurs:

- A function's maximum attendance limit is increased.
- A registrant is un-registered for a function with a wait list.
- A registration that includes a wait-listed function is cancelled.

To place a registrant on a wait list

1. From Events, select Register a customer to open the Register a customer window.

2. Find an event registration.
3. Click Edit.
4. Double-click a function. If the maximum attendance for the function has been reached, a message displays asking whether you wish to add the attendee to the wait list.
5. Click Yes to add the registrant to the wait list. The function will display with an "*" to the left of the function title.
6. Click Save to update the registration order.

To view wait lists

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Double-click an event function to open the Event Function Detail window.
4. Click More, and select Roster to open the Function Roster window and view the registrants on the wait list.

To create a wait list report

The Function Roster can be cloned, and new search criteria can be added to create either a Function Roster that includes wait list registrants or a Function Roster listing only wait list registrants.

1. Select Utilities> Report Specs to open the Report Specifications window.
2. Select MEETING - Rosters - Function Roster.
3. Click Clone.
4. Tab to the Title, and change the title, for example, Function Roster Including Wait List Registrants.
5. Click Parameters to open the Detail Reports Parameters window.

6. Place your cursor in the Search field.
7. Update the search criteria to read as follows:

   Order_Lines.QUANTITY_ORDERED>0 or Order_Lines.QUANTITY_BACKORDERED>0 or Orders.STATUS like 'C%'
8. Click Save.

To increase a function's maximum attendance limit

Use the following steps to increase a function's maximum attendance limit.

1. From Events, select Define an event to open the Define an event window.
2. Double-click an event to open it in the Define an event window.
3. Select the event function for which you want to increase the maximum attendance limit.
4. Click Edit to the right of the list of event functions to open the Event Function Detail window.
5. Increase the number in the Maximum field.
6. Click Save. When there is a wait list for this function, a message displays alerting you that you have increased the max allowed, and asking if you want the system to enroll as many as it can.
7. Click Yes to increase the maximum allowed.
8. Click Save.

   Note: Increasing a function's Maximum attendance limit will enroll registrants automatically from a wait list regardless of whether the Choose from Wait List for opening option is enabled or disabled on the Event System Preferences window (from Events, select Set up module, and click Preferences).

To cancel a registration and add an attendee from a wait list

Use the following procedure when the Choose from Wait List for opening option on the Event System Preferences window is enabled:

1. From Events, select Register a customer to open the Register a customer window.
2. Find the registration you want to cancel that contains the wait-listed function.
3. Click Delete. A system message prompts you to verify the cancellation of the registrant.
4. Click Yes to cancel the registration and display the Wait List window.
5. Double-click the attendee that you want to attend the function. A '>' appears to the left of the attendee's name.
6. Click OK.

Use the following procedure when the Choose from Wait List for opening option on the Event System Preferences window is disabled:

1. From Events, select Register a customer to open the Register a customer window.
2. Find the registration you want to cancel that contains the wait-listed function.
3. Click Delete. A system message prompts you to verify the cancellation of the registrant.
4. Click Yes to cancel the registration, and iMIS will register the first wait-listed attendee on the list.

To remove a wait-listed registrant from a wait list

You can use this process to remove an attendee from a wait list.

1. From Events, select Register a customer to open the Register a customer window.
2. Find the registration for the attendee you want to remove from a wait list.
3. Click Edit.
4. Double-click the wait-listed function which is marked with an ' *.' A system message prompts you to verify the removal of the attendee from the wait list.

5. Click Yes to remove the attendee from the wait list.
6. Click Save.

   Note: If the registrant decides to sign up for this function later, and the function is not available at the time of ordering, you can place the attendee on the wait list again.

Events

From your Staff site, Events offers a quick-view Dashboard of your organization's event progress and figures.

- Event registration last year
- Registrations by member type
- Revenue by event this year
- Total event registrations this year
- Event revenue this year
- Recent & upcoming events

Events Overview

Helping with events

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

Offering registrations on the web

It is easy for your members to register for events and individual functions from the web in just a few easy steps.

Scheduling sessions

Your iMIS administrators can watch for conflicts in schedules by setting up Conflict Codes |topic=Define Event Functions in the administrative views.

Registering attendees from your company

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

Tip: Check the carousel beneath the registration buttons to see which contact is currently selected.

Creating and managing events

To create an event

Staff Site > Events

1. Select Add event.
2. Enter the Event Code.

   Important: Code must be alphanumeric, contain no spaces, and be unique among all events.

3. Enter the Event Name.
4. Enter the optional information as appropriate:

- Enter a Description
- To allow users to register others, enable Allow registering others.
- (only available with Allow registering others) If you have an event for which this is appropriate, enable Allow adding guests. When enabled, the registrant can add a new contact and register that person for an event.
- To allow users to change their program items after checkout, enable Allow itinerary changes after checkout. If there is a cutoff date for changes, enable Cutoff for itinerary changes.
- Specify the inclusive dates and times.
- Enter a Capacity if you want iMIS to limit the number of registrations to accept.
- To display an image with the event listing, choose an Image from the list or browse to Upload New Image.
- To include Additional Information, enter HTML text in the editing panel. There is no limit on size.

5. Click Save.

To define registration options and event pricing

You must define at least one registration option or program item in order for users to be able to register for your event. For example, you might choose to create several registrations to include your members, students, vendors, staff members, and presenters. Each registration option allows you to set a price and registration cut-off date that is unique from other registration options.

1. Click Edit next to the event, navigate to the Pricing tab.
2. Enter the Early Cut-Off date and Regular Cut-Off date for the registration prices, if applicable.

Note: The dates entered are inclusive. As an example, Early Cut-Off date is the last day for the early discount price.

3. In the Registration Options section, click Add.
4. On the Add Registration Option popup, add a Function Code and Function Name.

   Important: Code must be alphanumeric, contain no spaces, and be unique among all registration options and program items in the event.

   Note: Once you have saved your Function Code, you are unable to change it.
5. Enter any other optional fields that apply to the registration option.
6. Open the Pricing tab and set the prices for the registration option.

- You can set both Standard and Discount Price fields, so that your members (those with IsMember status) can enjoy the benefit of a reduced fee. Note that the price you enter auto-fills the Discount Price; leave it (to prevent any discounting) or override the price: lower the amount, or set it to zero for those members to not be charged a fee. When your members view an event, they will see only the appropriate fee.
- If you entered an Early Cut-Off date for your event, the Early pricing fields will be available. If you entered a Regular Cut-Off date, Late pricing fields will be available.
- To make the registration option complimentary, select Comp for Standard and/or Discount prices.

7. On the Accounting tab and from the Income dropdown, choose the GL account to assign to the registration option. The Default option will use the system default account for events.
8. Click Save & Close.

   If needed, you can define additional registration options so that registrants can choose between different options.

   To add program items to an event

1. Select the desired event.
2. In the Program area, click Add.
3. Enter a Program Item Code and Program Item Name for the program item.

   Important: Code must be alphanumeric, contain no spaces, and be unique among all registration options and program items in the event.
4. Enter values for Capacity, Category, or Track if needed; these fields are optional.
5. If there are multiple program items with the same start date and time, you can enter a Sort Sequence to determine what order they appear in the program. Program items with the same start date and time will be sorted by this value, lowest to highest (items with a value of 0 will be the first in the order).
6. To display an image with the program item listing, choose an Image from the list or browse to Upload New Image.
7. To include Additional Information, enter HTML text in the editing panel; there is no limit on size.
8. Open the Pricing tab and set the prices for the program item.

- You can set both Standard and Discount Price fields, so that your members (those with IsMember status) can enjoy the benefit of a reduced fee. Note that the price you enter auto-fills the Discount Price; leave it (to prevent any discounting) or override the price: lower the amount, or select Comp for those members to not be charged a fee. When your members view an event, they will see only the appropriate fee.
- If you entered an Early Cut-Off date for your event, the Early pricing fields will be available. If you entered a Regular Cut-Off date, Late pricing fields will be available.
- To make the program item complimentary (or to include it as part of the event registration), select Comp for Standard and/or Discount prices.

9. Open the Accounting tab and from the Income dropdown choose the GL account to assign to the program item. The Default option will use the system default account for

events. If needed, you can also choose a Deferred Income account to assign to the program item.

Important: The Deferred Income option is available with a DEFINC iMIS license.

10. Click Save & Close.

Additional options for event definition may be available in the Administrative Console. Events and program items created on the web using iParts can be updated in the Administrative Console, if needed. See Event Definition and Event Function Definition for more details.

Troubleshooting: You must populate the Default Terms Code field in AR/Cash > Set up module > Aging with a value. If not, Event program items and registration options do not appear when users register on the web. You may also see the following error in the Error log: "COrder.TermsCode: The supplied value '0' is not defined in the Financial Terms reference table."

Registering for events

For yourself or On Behalf Of another contact, you can view contacts' events and register them for events. Public and Casual users are able to register other contacts from the same company.

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

To register for an event

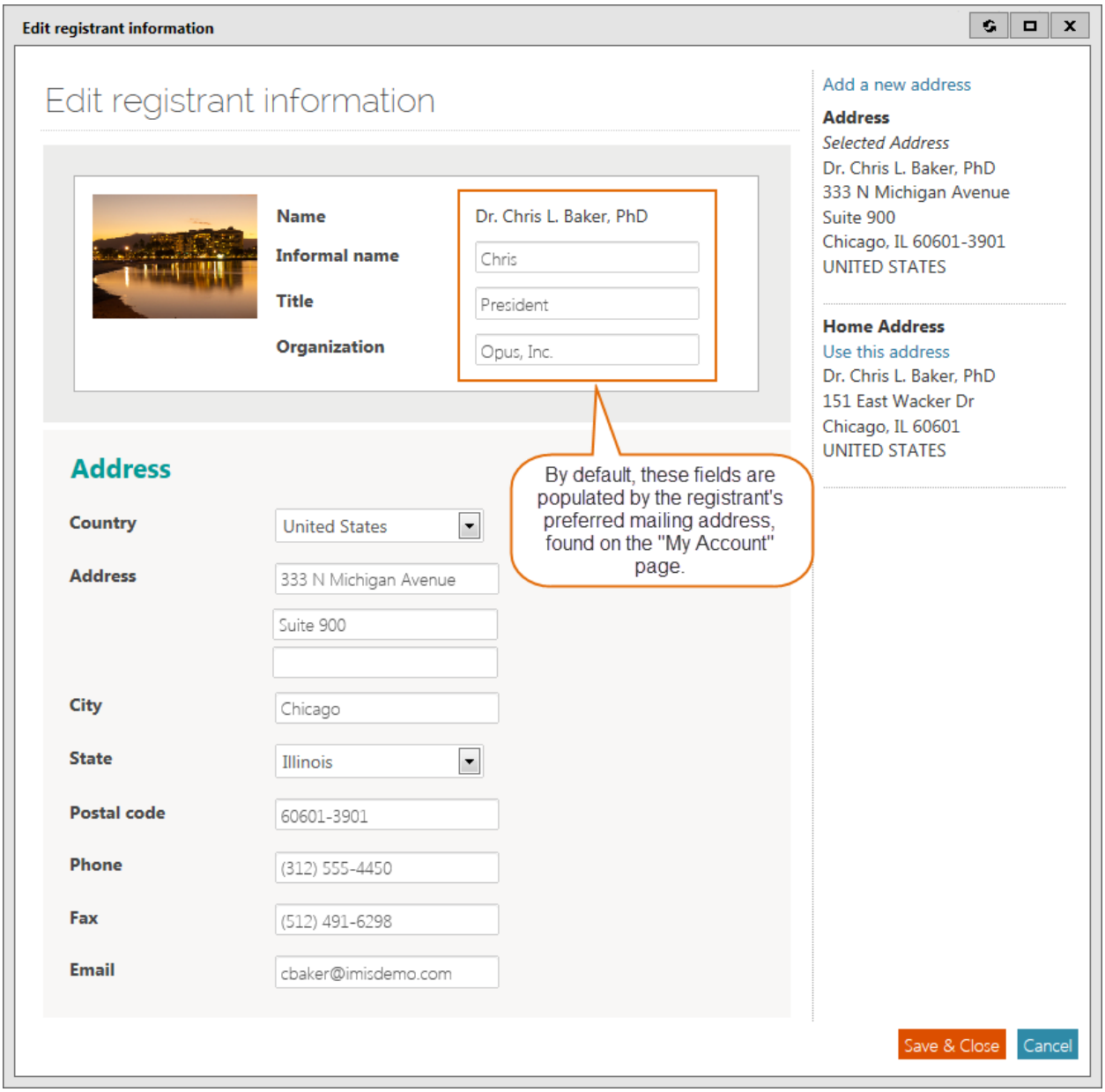
All available events are listed on the Event Calendar and in the general events list (Events > Find Events). You can browse this list or use the Search box to search for a word or phrase. Registrations appear in your cart along with any other items added, such as products and donations.

Note: Event registration is only available for events with an Active status.

Troubleshooting: If double-clicking an event in the Event Calendar returns the error The resource cannot be found, ensure that the EventDetail shortcut is configured correctly in Site Designer > Manage Shortcuts.

1. Select Events > Find Events or Search for the event.
2. Select the event.
3. Click Register or Register Someone Else.

   Note: If you would like to register On Behalf Of a contact, click the select contact drop-down, then search for the contact by name, company, or ID.
4. Click Edit to manage the registrant details (Informal name, Title, Organization, and Selected Address). This information is used for badges and other event-related reports. Registrants can edit this information or add a new address:



To override this default (Preferred Mail) address, select a different address or add one to the user's account.

Note: Any changes made to these registrant details update every instance of that address throughout iMIS. If you would like to create unique badge information for a registration, choose Add a new address and include your desired information.

Note: If you would like to leave the Informal name, Title, or Organization blank, this information must be removed from the My Account page. When a user simply deletes this

information while registering for an event, it is repopulated by the information on the My Account page.

5. If the event has registration options, select one for the registrant.
6. Select the program items the registrant will attend.

- Click on the program item group headings to expand and collapse the group sections.
- (Optional) If available for the program item, adjust the quantity.

- Click Add.

  Note: Functions set up for automatic enrollment do not have an Add link.

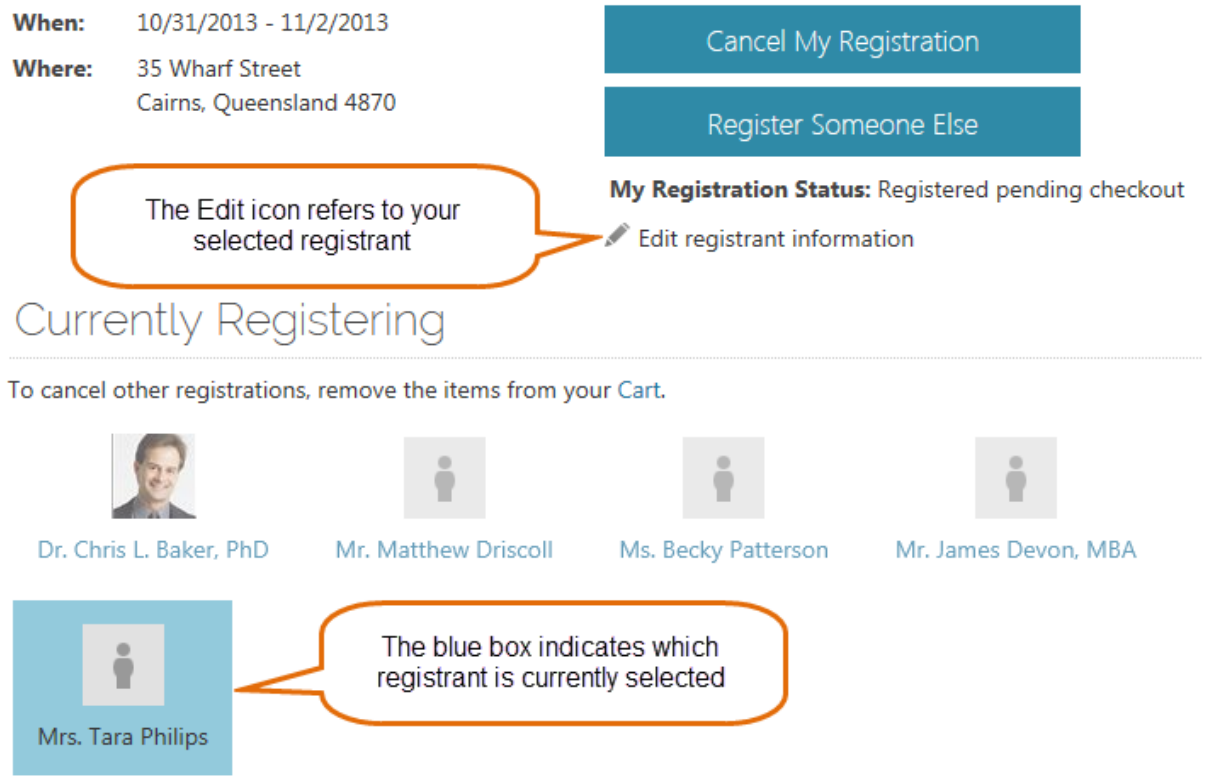
- For each program item added, the text In Itinerary appears next to the program item name.
- If there are any conflicting program items in the itinerary, such as two program items at the same time, you will receive a conflict message and will not be able to complete the registration process. You can easily clear up the conflict by removing one of the conflicting items.

7. (Optional) Choose whether to add any additional registrants by selecting Register Someone Else.

- Proceed as described in steps 3-6.
- To modify any registration in your shopping cart, select the desired registrant from the Currently Registering list.

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

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



Note: Using the Register Someone Else feature will place all additional registrations in your shopping cart. If you would like to register a different user and place the registration in their shopping cart, elect to work On Behalf Of, and select another user.

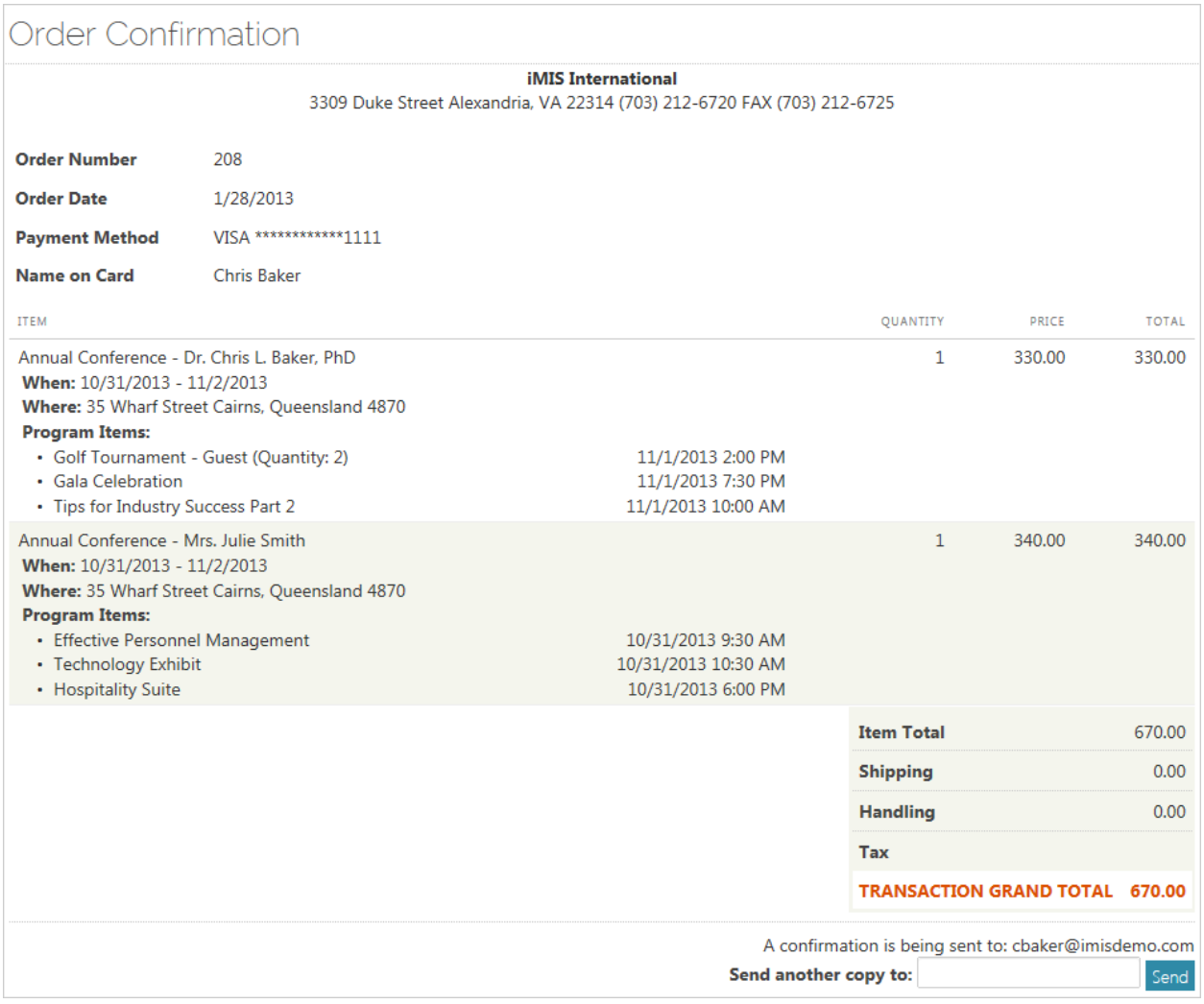
8. The Cart will contain your registration checkout details.

   iMIS guides you through the payment process.

Event and program item registrations appear in the shopping cart. Registrants may continue shopping or proceed to checkout. The pending registration is noted in the cart counter at the top of the page, and it shows up in the cart along with any other items selected for purchase. Links in the cart let users:

- cancel the pending registration by removing it
- click back to the event showcase (the page with both event details and the program items)

9. After checking out from the Cart, an Order Confirmation page appears. This reflects all registration details, including additional registrants and program item details.



Order Confirmation

iMIS International
3309 Duke Street Alexandria, VA 22314 (703) 212-6720 FAX (703) 212-6725

Order Number	208
Order Date	1/28/2013
Payment Method	VISA **********1111
Name on Card	Chris Baker

ITEM		QUANTITY	PRICE	TOTAL
Annual Conference - Dr. Chris L. Baker, PhD **When:** 10/31/2013 - 11/2/2013 **Where:** 35 Wharf Street Cairns, Queensland 4870 **Program Items:**		1	330.00	330.00
• Golf Tournament - Guest (Quantity: 2)	11/1/2013 2:00 PM			
• Gala Celebration	11/1/2013 7:30 PM			
• Tips for Industry Success Part 2	11/1/2013 10:00 AM			
Annual Conference - Mrs. Julie Smith **When:** 10/31/2013 - 11/2/2013 **Where:** 35 Wharf Street Cairns, Queensland 4870 **Program Items:**		1	340.00	340.00
• Effective Personnel Management	10/31/2013 9:30 AM			
• Technology Exhibit	10/31/2013 10:30 AM			
• Hospitality Suite	10/31/2013 6:00 PM			

Item Total	670.00
Shipping	0.00
Handling	0.00
Tax	
TRANSACTION GRAND TOTAL	**670.00**

A confirmation is being sent to: cbaker@imisdemo.com
Send another copy to: Send

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

To cancel an event registration

Users can cancel an event registration if they have not yet paid for it.

1. Select Events > Event list or Search for the event.
2. Select the desired event.
3. Click Cancel Registration.

Canceling an event registration before checkout has the effect of canceling registration for any and all of its program items as well.

Tip: If the ability to register someone else is enabled, you can delete others' registrations in bulk from the shopping cart.

To cancel a program item registration

Users can also cancel a program item registration if they have not yet paid for it.

1. Select Events > Event list or Search for the event.
2. Select the desired event.
3. Click Remove for the desired program item.

To change program item registrations after registration is complete

If Allow itinerary changes after checkout is enabled for the event (and the Cutoff for itinerary changes date has not passed), users can change their program item registrations after completion of the registration process, with the following exceptions:

- Fundraising program items
- Program items with a promotion discount applied

- VAT or Canadian taxation methods
- Canceled registrations

(The above scenarios are supported via Administrative Console and Desktop.)

1. In the program area of an event you have already registered for, add, remove, or update the quantity for any program item.
2. After completing all desired changes to program items, click Proceed to Checkout or view the Cart.

- The Cart will contain a line for the adjusted event with the total charge or credit for all adjustments.
- iMIS guides you through the payment process.

3. An Order Confirmation page will appear, reflecting all of your registration and program item details.

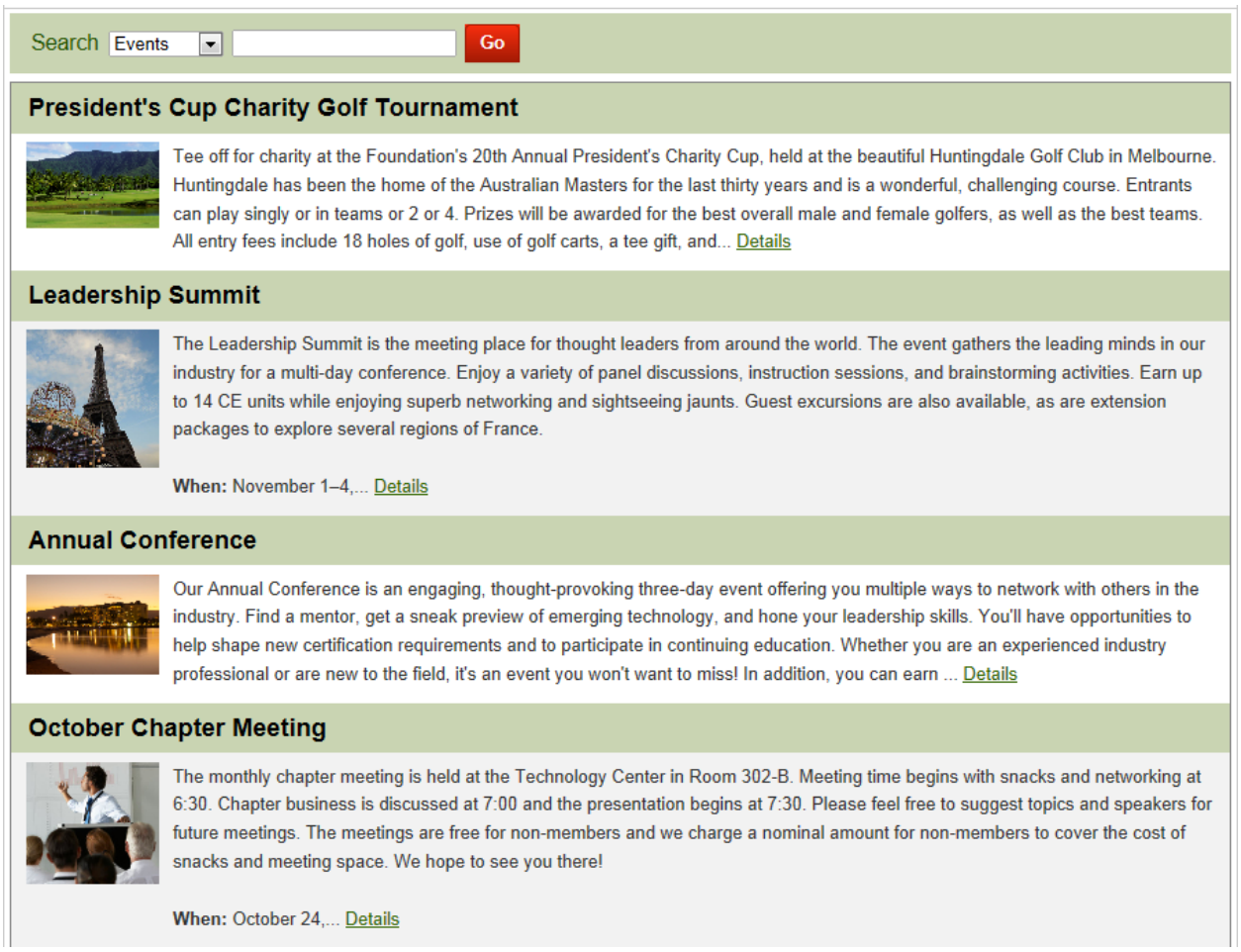
Note: Changing program item registrations after checkout is only available if the batch for the original registration is posted in iMIS Administrative Console/Desktop (or if the changes are being made in the same batch as the original registration).

Browsing events

Event list

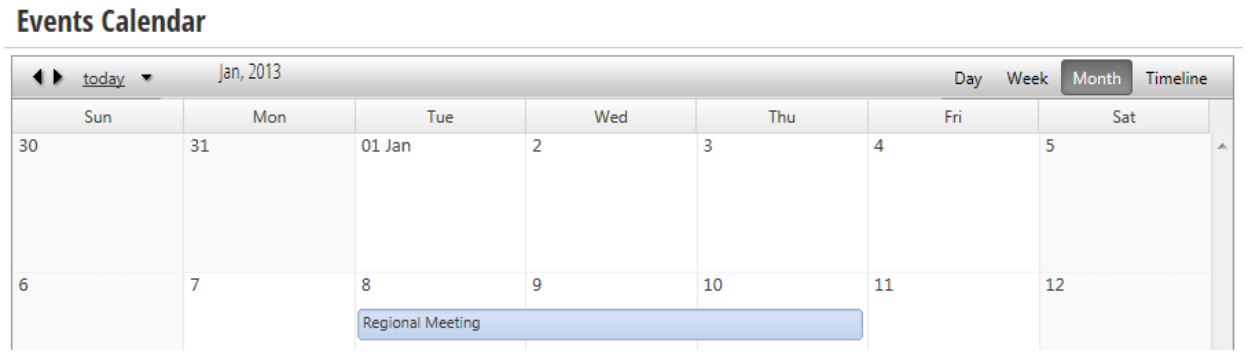
List active events by selecting (Event tab) > Event list.

Note: You can configure this page to list any type of event using the ViewAll query. Access this query from RiSE > IQA > EventManagement > DefaultSystem > Queries > EventList to add a filter for the event Type.



Event calendar

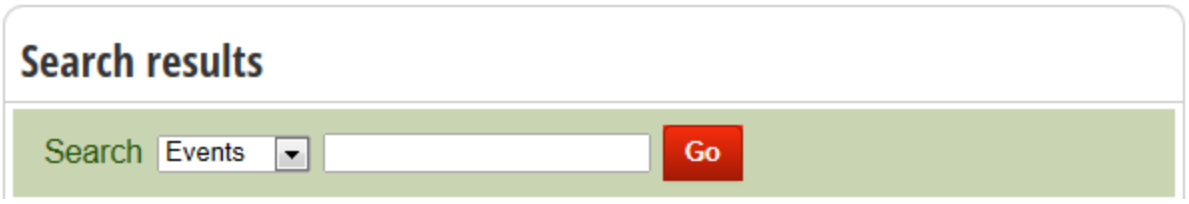
View the calendar by Day, Week, Month, or Timeline by selecting (Event tab) > Event calendar).



Event search

You can search for events by month, event name, city, state, or province, or topic in Events > Event list. Staff users can search for all events, including events that are not web-enabled when defined from the Administrative Console or Desktop.

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



Note: This page can be configured to list any type of event using the ViewAll query. Access this query from RiSE > IQA > EventManagement > DefaultSystem > Queries > EventSearch to add a filter for the event Type.

Enabling 'Register Someone Else'

You can grant your users the ability to register themselves and/or to register and pay for the registrations of others. Your staff may also complete bulk registrations using Register Someone Else when they work On Behalf Of.

When this option is disabled, users can only register themselves.

To enable 'Register Someone Else'

1. Open the desired event and select Edit.
2. Enable Allow registering others, so that users can register others.

Note: The user who pays for the registrant's event fees is listed as the Bill To party on those registrations. All accounting and invoice transactions are tracked under the Bill To ID.

3. (only available with Allow registering others) If you have an event for which this is appropriate, enable Allow adding guests. When enabled, the registrant can add a new contact and register that person for an event.

   Note: You can edit the form that pops up when a registrant creates a new contact to add as a guest. The popup window displays the Simple Account Creator content record, located in @/iMIS/ContactManagement.

4. Select Save & Close.

   Troubleshooting: If the Event Program Display does not refresh when the user selects to register another person, you may need to connect the iParts on your content record. Connecting iParts to refresh program items.

   Connecting iParts to refresh program items

   In order for the Program Display iPart to refresh automatically whenever a user changes the selected registrant, it needs a connection to the Event Display iPart on the content record that they share. You will need to create connections for any event pages that you design from scratch using the iPart's Connect feature, which you enable separately from Configure.

   Note: Check an iPart's Configuration Help topic to find out if it supports any connection options. An iPart has no connection support (neither consumer nor provider) unless its author added it.

   To connect event iParts for dynamic updating

1. Edit the content record that contains the event iParts (Event Display, Event Program Display).
2. Set up the connection:

- From the Event Display iPart's title-bar menu, select Connect.

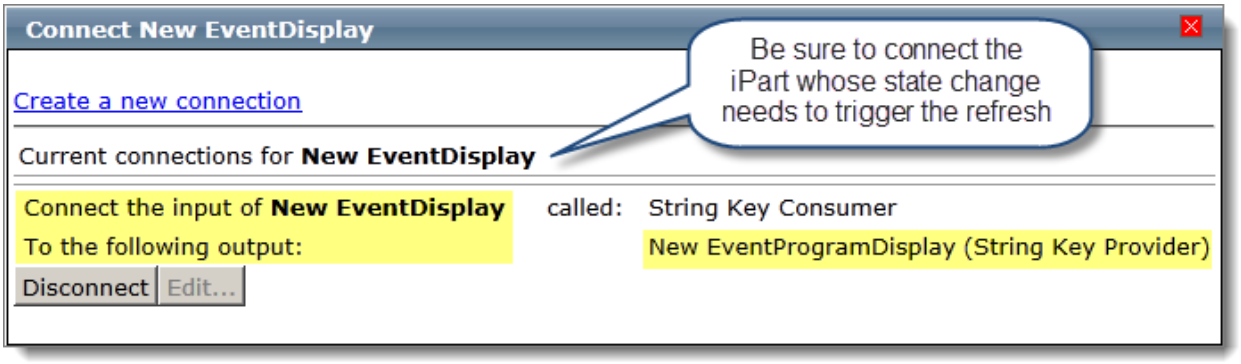
The Connect box that opens shows you any current connections and lets you disconnect them.

- Select Create a new connection.

  The Connect box that pops up prompts you to create one of four connection types.

  Tip: Do not be misled by the language of connection. The Consumer is the actor that triggers a refresh on another iPart, and the Provider provides a pointer to itself to the Consumer.

- From the String Key Consumer drop list, select your Event Program Display iPart.
- Select Connect.



3. Save and Publish the content record.

Enabling 'Allow itinerary changes after checkout'

You can easily grant your users the ability to change program items within their itineraries after they have checked out. Staff can also assign cutoff dates for allowing changes to program items.

When this option is disabled, users will not be able to change program items within itineraries after checking out.

To enable Allow itinerary changes after checkout

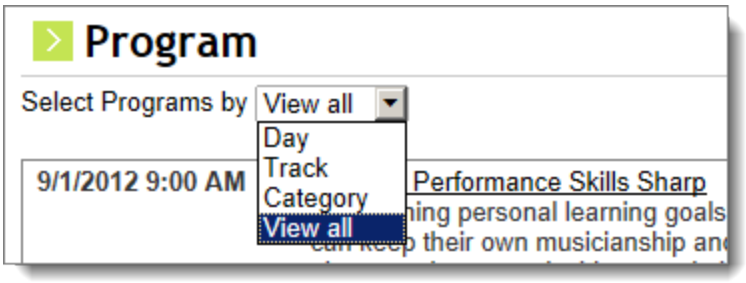
1. Open the desired event and select Edit.

1. From the Info tab, enable Allow itinerary changes after checkout.
2. (Optional) If you have a cutoff date, enter the date in Cutoff date for itinerary changes.
3. Save.

Events iParts overview

Use the Events iParts (Content Gallery > Offering) to design and present your events for self-service registration in your public-facing iMIS website.

- Event Display – shows event information, manages registration status, and (optionally) permits users to register others
- Event Program Display – lists all program items within an event that the registrant can select, with the ability to group the program items by day, track, and category, if they are defined:

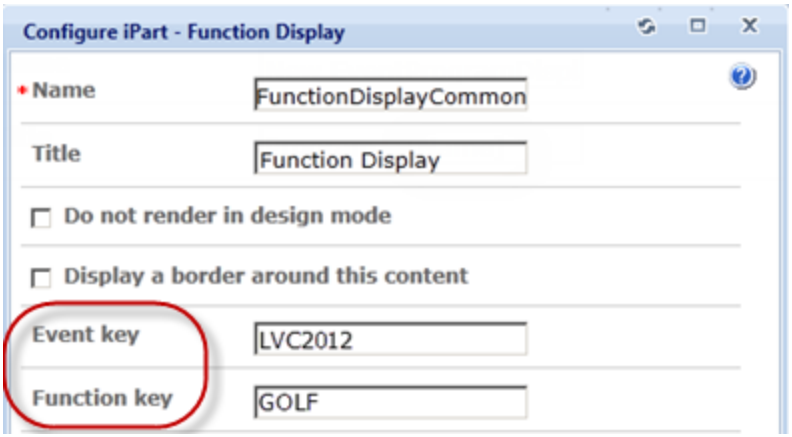


- Function Display – shows program item information and modifies registration status
- Event Edit – edits details about an event and allows creation of new events when no event key is specified
- Function Edit – edits details about a program item and allows creation of new program items when no function key is specified

Note: Anonymous visitors to your website (both non-members and members who have not signed in yet) may view information about events and program items. However, to register, they must sign in.

Referencing by Key

These iParts reference specific events and program items directly by use of a key. Usually keys are passed via the URL, but you can also specify a key when configuring an iPart. Keys in the URL override those in the configuration.



Keys are required for the Display iParts. If a key is missing (that is, a key is neither passed on the URL nor specified in the configuration) in a Display iPart, then the iPart hides itself from your users. If a key is missing in the Edit iParts, then the iPart will create a new event or program item.

Note: It takes a while for the indexing service to remove a deleted event. If an iPart cannot hide itself because of this delay, it reports that the event was deleted.

Finding event keys

How you identify the key for a specific item depends on whether it is an event or a program item:

- Event key (Meet_Master.MEETING column): This comes from the Event Code defined in the event.
- Function key (Product_Function.PRODUCT_CODE column): This comes from the Program Item Code defined in the program item.

EXPOCAD Interface

Overview: EXPOCAD Interface

Welcome to iMIS EXPOCAD interface. iMIS integrates EXPOCAD into iMIS Exposition Management. This product allows you to work within the graphical interface of EXPOCAD to create and modify booth assignments and then transfer that data to the iMIS Exposition Management system for invoicing and tracking of exhibitor information.

The purpose of the EXPOCAD interface is to allow booth selection and assignments to occur in EXPOCAD while maintaining billing and prospecting capabilities in iMIS. The EXPOCAD interface and iMIS Exposition Management system work independently, but collectively:

- Booth inventory numbers are maintained in EXPOCAD.
- The ExpoCadExp event file contains all the data pertinent to renting, un-renting, or editing existing rented booth information
- EXPOCAD booth information is imported into iMIS based on booth assignment activity within EXPOCAD.
- All order processing is completed in the Exposition Management system.

Note: To authorize credit card payments for Events, Exhibition, Exposition, and Orders, enter them through Service Central > Enter and edit payments (if licensed for SERVCEN) or AR/Cash > Cash receipts (if licensed for CCAUTH).

Note: This document describes how EXPOCAD interfaces with the iMIS Exposition Management system. EXPOCAD functionality is only discussed in reference to the iMIS interface. For detailed instructions on EXPOCAD, see the EXPOCAD User's Guide.

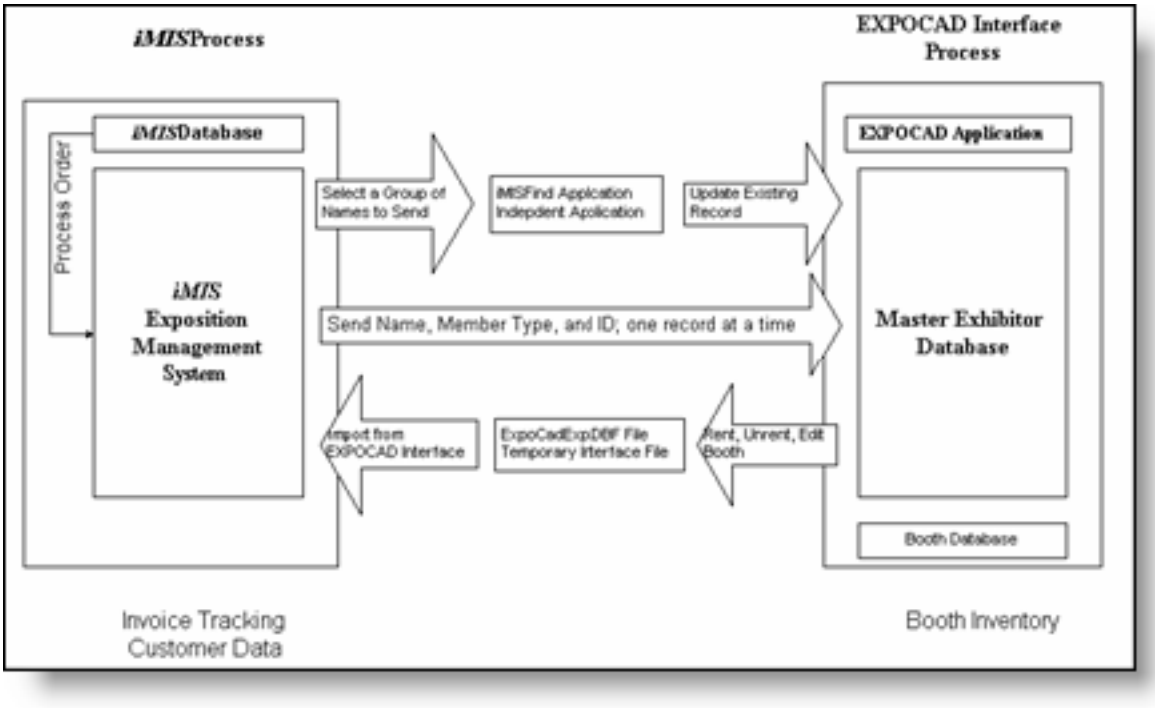
EXPOCAD Interface Capabilities

The EXPOCAD interface automates the booth inventory process. Your initial floor layout and booth numbering provide standards for a database of exposition booths. With

EXPOCAD booths, you can create islands and peninsulas, or booths can be combined to conform to your layout needs.

The following diagram shows how the EXPOCAD interface works. Exhibitor names are imported using an independent iMISFind application. You can also import Member Type and member ID from one iMIS exhibitor at a time to an EXPOCAD Master Exhibitor database. All booth renting activity takes place in EXPOCAD, and is stored in a temporary interface file called ExpoCadExp. Information in the ExpoCadExp file is then exported into iMIS for order processing.

EXPOCAD Components



The following are the three main components required for using the EXPOCAD interface with iMIS:

- iMISFind application
- EXPOCAD application and ExpoCadExp file
- iMIS modules

iMISFind

This is a Visual Basic executable file. You must use the iMISFind application to log in to the iMIS database and retrieve records, and also to export them to the EXPOCAD Exhibitor database. Users must have at least a level 1 security for both Membership and Exposition Management in iMIS to use iMISFind.

To use iMISFind you must have an iMIS ODBC setup.

For an export to be successful:

- Both iMISFind and EXPOCAD must be open; and
- An event has to be open in EXPOCAD.

You can find exhibitors (all from the Name table) using the following:

- Member ID
- Name
- Company
- Member Type
- Prospect on Event

The Name and Company searches can be partial searches on a “begins with” basis. If you do enter a search value, a system message displays warning you that it may take a long time for the system to complete the search.

If an Exhibitor ID already exists in EXPOCAD, the system automatically compares the Group, Name, and Displayed Name. If any of the fields do not match the corresponding Exhibitor ID in EXPOCAD, the system automatically updates the record with the current information imported from iMIS.

EXPOCAD and ExpoCadExp file

The ExpoCadExp file contains the following information: rented booths, un-rented booths, booth number changes for rented booths, and booth class changes that involve aisle booths that occur in EXPOCAD. This file is updated by all booth activities from the EXPOCAD database. Each time a booth is rented, or un-rented, or when a previously

rented booth has a number change, or a previously rented booth has a class change to/-from aisle booth in the EXPOCAD database, the system writes transactions to the ExpoCadExp file.

The first time you open an event in EXPOCAD, the ExpoCadExp file is created in the same location as the EXPOCAD Master and/or Event Exhibitor database. The system uses the same file for all EXPOCAD events.

The iMIS Import will process records from the ExpoCadExp file into Exhibition Management.

iMIS Modules

To import and export information to and from EXPOCAD, you will use the following iMIS modules:

- Customer Management – iMISFind displays exhibitor records in this module which you can export to EXPOCAD.
- Exposition Management – You will use this module with EXPOCAD to accomplish the following:
- Define exposition code, begin/end date, and early/regular cutoff dates (product related)
- Choose the exposition category (iMIS or EXPOCAD)
- Insert exposition products and fees

The EXPOCAD Import in iMIS imports records from the ExpoCadExp file to create or update orders. To use the EXPOCAD Import, you must enable Batch Control (AR> System Setup, click Batch Control, select a batch control option). A batch must be selected before any ExpoCadExp orders can be imported to iMIS Orders.

Before you import exhibitor records to iMIS, you can run an iMIS ExpoCadExp report that prints all records in the file.

Benefits of the EXPOCAD Interface

The following are benefits of using the EXPOCAD interface with the Exposition Management System:

- Saves you time by reducing data entry.
- Booth assignments can be managed in one place and then imported into iMIS for order processing. When you use the EXPOCAD interface, booth assignments are made in EXPOCAD. You will not use the Exposition Management System to manage booths.
- Promotes accurate record management by lessening the chance of user error as wait listing is not used and booth assignments are made in the EXPOCAD interface.
- Allows you to see the floor plan in a graphical image.
- You can see where a booth is located on the floor, whether the booth is rented, and to whom it is rented.

EXPOCAD Interface Terms

The following are EXPOCAD terms. In the definitions, you are also given the Exposition Management System related term.

Event

Events are your shows. They are also the same as an exposition. The EXPOCAD event file contains all booth layout information, booth graphics, and text associated with your event. This includes the size, number, and location of each individual booth, as well as all exhibitor booth assignments.

Event Exhibitor List

This is a database of potential or actual exhibitors. This database in conjunction with the Master Exhibitor List must contain all the assigned exhibitors. If you do not use the Master Exhibitor List, you should change to the alternate database before any booth assignments are made.

Exhibitors

Exhibitors are your clients or prospects (potential clients). Exhibitors can also be companies. These files contain exhibitor information that may be used for assigning and managing your clients. The exhibitor file is associated with the iMIS Membership list, a specific event's exhibitor list, or a contact management file.

Import

This function imports booth files and exhibitor information into iMIS.

Master Exhibitor List

This is a database of potential or actual exhibitors. This database in conjunction with the Event Exhibitor List must contain all of the assigned exhibitors.

Pack

The primary function of Pack is to remove a record marked for deletion in the ExpoCadExp file. Records are marked 'Deleted' once they are successfully imported, or upon deletion from the Import Error List. Using Pack physically deletes the marked records from the file, reducing the file size.

Rent

This is the same as "assigning" exhibitors to booths in iMIS Exposition.

Table Structures for EXPOCAD

These are the tables and fields involved in EXPOCAD:

Expo_Control

Stored in System_Params where ParameterName = Expo_Control. Additional fields have been added to the Expo_Control table. These fields will be used in the Expo System Setup window.

UseQtyOrSqrFt	Boolean	0 if using Quantity 1 if using Area (Square Units)
ImportRunning	Boolean	1 if import is running

ExpoCad_Prod

Stores the product mapping between EXPOCAD and iMIS.

MEET_ID	Char(10)	Event in EXPOCAD Exposition code in iMIS
ExpoCad_ Type	Char(40)	Booth Type in EXPOCAD Island, Peninsula, Corner, Inline, Custom and Aisle Booth
Product_Code	Char(31)	Exposition ‘Booth’ product code
Premium_1	Char(31)	Exposition ‘Other’ or ‘Paid Pass’ product code
Qty_1	Numeric	Quantity for Premium_1
Premium_2	Char(31)	Exposition ‘Other’ or ‘Paid Pass’ product code
Qty_2	Numeric	Quantity for Premium_2

Meet_Master

Additional field has been added.

Meet_Category	Numeric	0 if iMIS exposition 1 if EXPOCAD exposition

Exhb_Booth

Additional field has been added.

Booth_Type	Char(40)	Stores the Booth Type from EXPOCAD

EXPOCAD: ExpoCadExp

A FoxPro database file created when an event in EXPOCAD is initially setup.

Count_Val	Numeric (18)	Value of the current counter. Equal to 0 when Proc_Desc ='iMISCounter'
UniqueID	Numeric (18)	Unique ID generated from the increment of Count_Val
Orig_ Booth	Char(20)	Original Booth Number
New_ Booth	Char(20)	New Booth Number
Booth_ Size	Numeric (18)	Size of booth in square units
Booth_ Type	Char(40)	Booth Type in EXPOCAD Island, Peninsula, Corner, Inline, Custom and ab
Exhb_ID	Char(20)	Exhibitor ID
Event_ Name	Char(20)	Event name in EXPOCAD Exposition name in iMIS
Proc_ Desc	Char(100)	Description of EXPOCAD activity 'Rent Booth','Unrent Booth','Booth Num Change','Booth Class Change', and 'iMISCounter'
Insert_Dat	Char(22)	Date record was added in EXPOCAD stored in CCYYMMDD HH:MM:SS format
Retrv_By	Char(100)	Upon successful import, stores the UserID+RetrieveDate, marking that line for deletion. If the record fails the import, stores FAIL_UserID+RetrieveDate

EXPOCAD Known Issue

If you change the class of a rented booth to Aisle, then go to Booth> View Booth to verify the class change, to close that window you only have the choices of OK or Cancel.

- If you close the window using the OK button, then Booth> Booth Class to change the class back to Standard, the Booth Type in EXPOCAD remains at Aisle. Depending on your Product Mapping and pricing in iMIS, using the OK button would create orders with incorrect pricing and an incorrect booth product code.
- If you close the window using the Cancel button, then Booth> Booth Class to change the class back to Standard, the class does revert to Inline, as it should.

Overview of EXPOCAD Requirements

The following steps must be completed before you can begin using EXPOCAD:

- Install EXPOCAD
- Install iMISFind
- Setup an ODBC driver for Microsoft Visual FoxPro 6.01.8629.01 or higher

  Note: You must be on Sybase Adaptive Server Anywhere 6.0 or MSSQL Server 6.5 or 7.0.

  Note: You may receive a warning message within iMIS when using MSSQL Server 6.5 that you are unable to connect due to the maximum number of configured user connections already connected. A higher value can be configured with sp_configure.

Defining an Event (Exposition) in EXPOCAD

To define an event in EXPOCAD, you must do three things:

- Define the default booth size
- Define the event
- Create the floor plan

Defining the Default Booth Size in EXPOCAD

In order to define the default booth size, you will need to first set the default unit of measure that will be used, and then set the size of the smallest booth.

Note: See the EXPOCAD User's Guide for additional information on how to use EXPOCAD.

To set the default unit of measurement

The Unit window is used to set the default unit of measurement (for example, inches or meters) that will be used to describe the booth size.

1. Open the EXPOCAD application (Start> Programs> EXPOCAD).
2. Select Options> Unit to open the Unit window. The default values shown in the Unit window are set for English measurements.
3. Select the units.
4. Click OK.

To set the booth default values

The default booth sizes are based on 10' 0" x 10' 0" (U.S.) and 3.0m x 3.0m (Europe). You will set the smallest booth size needed as a building block for the floor plan.

1. In EXPOCAD, select Options> Default to open the EXPOCAD – Default Values window.
2. Change the default values, if necessary.

Note: These defaults are what appear on the EXPOCAD – Max Fit window.

Defining the Event (Exposition) in EXPOCAD

The event you define will be used in EXPOCAD and iMIS for importing and exporting records. Make sure to create an iMIS exposition with the same name as the event you define in EXPOCAD. See Defining an EXPOCAD Exposition (Event) in iMIS.

To define the company database and event in EXPOCAD

The steps below demonstrate defining both a Company Database and an Event in EXPOCAD, however, you are not required to create a new Company Database for each Event.

1. In EXPOCAD, select File> Open File to open the EXPOCAD – File Open window.
2. Enable the Company Database option.

   Note: At this point, you could select a Company Database, or continue with step 3 and enter a new one. If you select a Company Database, continue with step 6.
3. Enter the File Name of the company database in the File Name field.
4. Click OK. The EXPOCAD – Add New Exhibitor window opens, expecting you to enter an individual exhibitor name. You won't need to enter exhibitor information because you will later import this information from iMIS.
5. Click Cancel.

   Note: If you click OK, a message displays stating that a client number and name must be entered. Click OK to close the message and then click Cancel.
6. Select File> Open to open the EXPOCAD – File Open window again.
7. Enable the Event option and enter the EXPOCAD event name, which is the same name you will enter in as the exposition code in iMIS.

   Note: This field must match the iMIS Exposition Code, so it is both case sensitive (use all capital letters) and character specific.
8. Click OK to display the EXPOCAD – Event Information window.

   Note: At this point you need to decide if your exhibitor list is going to be specific for this event, or if you're going to use a master list (one used in other events).

   When importing exhibitor names into EXPOCAD, it will first look to see if there is a file name entered for the Master Exhibitor List. If no file name is entered, it will import to the default file name entered for the Event Exhibitor List.
9. Click the Event Exhibitor List or Master Exhibitor List button to open the Open file window, or accept the Event Exhibitor List default.

Note: EXPOCAD does not allow you to create an event without a Master Exhibitor List or Event Exhibitor List referenced. If both these fields are left blank, EXPOCAD creates a default Event Exhibitor List and populates the field when the window is closed.

10. Select the company database and click Open. The database name is automatically populated in the corresponding list field.
11. Click OK to display the EXPOCAD tool bar.
12. Click X in the right hand corner to close this window.

Creating an EXPOCAD Floor Plan

Now that you have defined your event in EXPOCAD, you will create a graphical layout of the event floor plan using the EXPOCAD – Max Fit window. Using the floor plan you can rent (order), un-rent, or reassign booths, and perform other booth management tasks.

To create an EXPOCAD floor plan

1. In EXPOCAD, select Booth> Max Fit to open the EXPOCAD – Max Fit window.

   Note: The layouts are based on the smallest booth size set in the EXPOCAD – Default Values window (Options> Defaults). The size can be any value that you want and it may vary in a single event.

2. Create the floor plan based on your exposition needs.

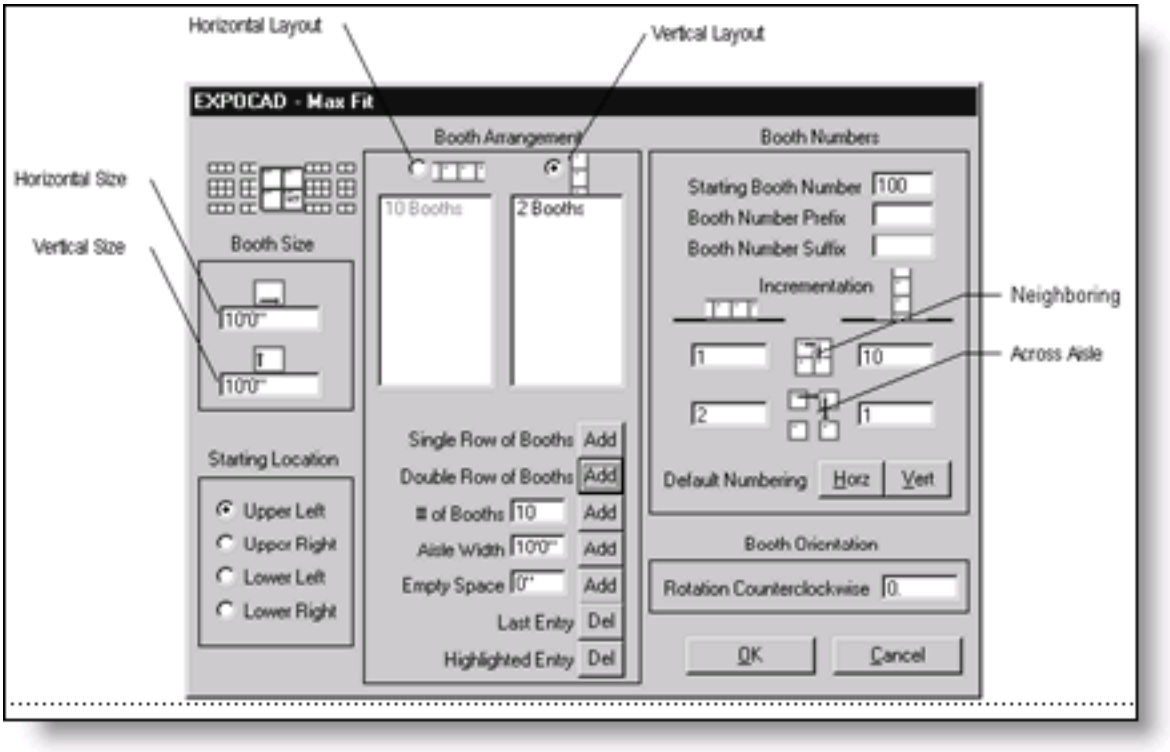
   Note: Tabbing through the Default Numbering Horz and Vert buttons will save the Incrementation as you entered it. Clicking the Horz button will revert to the default Incrementation of 2, 99, 2, 1.

3. Click OK. This will close the EXPOCAD – Max Fit window.
4. Click on the main EXPOCAD window to view the floor plan.

   Note: If you do not click on the main EXPOCAD window, you will lose the setup you have just done.

5. Select View> Fit to fit the plan to the window. The floor plan will display in your EXPOCAD window.

6. Select File> Close.



Installing the EXPOCAD Components

Installing EXPOCAD

You must purchase EXPOCAD version 6.8 or later from Applied Computer Technology, Inc. (www.expocad.com). Follow the installation instructions provided with the EXPOCAD CD.

Program files must be installed on your local drive while data files can be installed on the server.

Installing iMISFind

iMISFind is a Visual Basic executable file. iMISFind allows you to log on to the iMIS database and retrieve any necessary Name record(s) and import that information into an EXPOCAD database. The ODBC used for iMIS is also used for the iMISFind application. Your logon name and password for iMISFind are the same as the ones you use for iMIS.

Note: Installing iMISFind prior to creating events in EXPOCAD is required. The installation of iMISFIND replaces the expo1.dll file.

To install iMISFind

The current version of the iMISFind utility will need to be uninstalled prior to installing a newer version.

1. Uninstall iMISFind.

1. Click Start and select Settings> Control Panel.
2. Double-click Add/Remove Programs on the Control Panel.
3. Select iMISFind and click Add/Remove.
4. Run the setup program for iMISFind.
5. A message box indicates “Copying Files, please stand by.”
6. A message box displays that welcomes you to the iMISFind Installation program and recommends that you close any applications you are running before proceeding.
7. Click OK. If you do have other programs open, click Exit Setup, close any open applications and resume the setup.
8. A message displays telling you that you can begin the installation by clicking the button below. The installation program prompts you to place the iMISFind program in the default location, C:\Program Files\iMISFind\, or to select another destination folder.

1. Click the Change Directory button to specify that the iMISFind program be installed in the EXPOCAD\Program directory.
2. Browse to the EXPOCAD\Program directory, double-click the destination directory and click OK.
3. To begin the installation, click the button that has the computer graphic on it.
4. A message displays telling you that setup will add items to the group shown in the Program Group box. Click Continue to create the iMISFind group. The install process begins copying the files.

5. When the message appears telling you that the iMIS Find Setup was completed successfully, click OK.

   Note: The St6unst.log file is created as part of the installation process. This file is located in the same directory as the iMISFind.exe. Do not modify or delete this file. The St6unst.log file contains information about the installation, and it is used to automatically remove all application components when you remove the program through Start> Settings> Control Panel> Add/Remove Programs.

   ODBC setup for the iMISFind application

   The ODBC setup for iMIS can be used as the ODBC for the iMISFind application.

Creating an ODBC for FoxPro

An ODBC must be set up to use the Microsoft Visual FoxPro driver, which is required to retrieve records from the ExpoCadExp file. The ExpoCadExp file stores the EXPOCAD activity records, which are then available for import (Expo> EXPOCAD Import).

To set up a FoxPro ODBC

1. Click Start> Settings> Control Panel, and select Data Sources (ODBC) to open the ODBC Data Source Administrator window.
2. Click the System DSN tab.
3. Click the Add button. The Create New Data Source window opens.
4. In the list of drivers shown, highlight Microsoft Visual FoxPro Driver and click Finish. The ODBC Visual FoxPro Setup window opens.
5. Enter a Data Source Name and Description.
6. Check the Free Table directory option. This specifies the data source you want to connect to the directory for free tables (.dbf).
7. Enter or browse to the Path to the directory where you have your EXPOCAD\Company file folder. This path will be used by iMIS to find the ExpoCadExp file, which will be created in the Company folder of EXPOCAD.
8. Click Options to view additional ODBC setup options:

9. Select Machine from the Collating sequence drop-down list. The following options are ODBC defaults. Do not disable the defaults.

- Null – allows an insert on a null value
- Deleted – prevents deleted records from being retrieved. This option should remain enabled because the FoxPro database does not physically remove deleted records from the database until a Pack command is run. Disabling this option will cause deleted records to be retrieved.
- Fetch data in background – determines whether records can be retrieved in the back-ground (progressive fetching)

10. Click OK on the ODBC Visual FoxPro Setup window:

- If the path for your EXPOCAD\Company folder is incorrect, a message displays telling you that you have an invalid free table directory specification.

11. Verify the path and click OK.

- If the path for your EXPOCAD\Company folder is correct, click OK on the ODBC Data Source Administrator window.

Setting up iMISFind for use with EXPOCAD

You must specify a Data Source Name in the Local Preference window of the iMISFind application before you run the iMISFind application. The Data Source Name is the same one used for iMIS.

To determine the data source name used with iMIS

1. Click Start and select Settings> Control Panel.
2. Double-click Data Sources (ODBC).
3. Click the System DSN tab.

The data source name is shown in the Name column.

To specify the data source in iMISFind

1. Open the iMISFind application (Start> Programs> iMISFind).

2. Click Cancel when the Logon window opens.
3. Select Logon> Set Host Location. The Local Preference window opens.
4. Enter the Data Source Name.
5. Click OK.
6. Select Logon> Logon to Host to log on to iMISFind.

Setting up iMIS for use with EXPOCAD

There is an additional license key for EXPOCAD in iMIS. You must have both the Exposition Management System license key and the EXPOCAD license key to use the EXPOCAD interface. Without the EXPOCAD license key, EXPOCAD buttons are hidden and graphic features cannot be seen or used. In addition to adding the EXPOCAD license key, you must do the following:

- Set the iMIS authorization levels
- Select the booth measurement option
- Define the EXPOCAD local setup

To set iMIS authorization levels

The following authorization levels must be set in iMIS before you can use EXPOCAD:

1. Log on to iMIS as MANAGER.
2. From System Setup, select Security administration > Users.
3. Find a Full or Casual user and open their user record.
4. Set the following authorization levels:

- To allow the user to have access to both the EXPOCAD Local Setup menu item (Expo> EXPOCAD Local Setup) and the EXPOCAD Import menu item (Expo> EXPOCAD Import), the user must have an Expo Mgmt authorization level of 4 or higher.
- To allow the user to have access to the Delete button on the EXPOCAD Import window, the user must have an Expo Mgmt authorization level of 8 or higher.

- To allow the user to have access to the iMISFind application, the user must have a Members and Expo Mgmt authorization level of 1 or higher. When a user with an unauthorized level tries to use the utility a message displays telling the user the level of authorization needed to access that feature and to contact your system administrator to obtain the necessary authorization.

  Note: EXPOCAD security is independent of iMIS Security.

5. Click Save.

To select the booth measurement option

With the addition of EXPOCAD, booth pricing can be calculated in one of two ways: quantity or area.

Calculating by Quantity calculates booth pricing based on the quantity of booths ordered that are of the dimension defined in the booth product code. The booth price is multiplied by the quantity ordered to calculate the total price. This is the way Exposition has worked in the past, and is the default setting for this option.

EXPOCAD defines all booth products by total square units. The Area (Square Units) option allows iMIS to calculate pricing in this manner as well.

Note: This is a System Setup option and not exposition-specific; therefore, booth pricing for all expositions will be calculated using either Quantity or Area.

Note: Do not change these options while an exposition is in progress. When this option is changed, it will affect orders entered from that point on. Changing this option will not update or change previous orders.

1. Select Expo> System Setup to open the Expo System Setup window.
2. Click Expocad. The ExpoCad System Options window opens.
3. Click Edit on the palette.
4. Enable the measurement option that iMIS will use to calculate orders.

- Quantity (default) – When this option is selected, iMIS will prompt you to enter the required booth product code dimensions. Booth price is determined by the number

(quantity) of booths of the defined dimension multiplied by the product fee. The product fee is setup as the total fee for that booth. For example, a booth is defined in iMIS with dimensions of 10' x 10' for a cost of $1,000. An exhibitor rents two booths in EXPOCAD, which exports as 200 square units. 200 square units (coming from EXPOCAD) divided by 100 square units (dimensions in iMIS) equal a quantity of 2. The quantity is multiplied by the product fee of $1,000 for a total cost of $2,000.

- Area (Square Units) – iMIS-defined booth dimensions do not apply to the calculation. The price of the booth is a per square unit price. For example, a booth is defined in iMIS with a cost of $10 per square unit. An exhibitor rents two standard (100 square units each) booths in EXPOCAD, which exports as 200 square units. 200 square units (coming from EXPOCAD) multiplied by $10 (price per square unit in iMIS) equals a total cost of $2,000.

5. Click OK.
6. Click X to close the window.

To define the EXPOCAD local setup

1. Select Expo> EXPOCAD Local Setup to display the ExpoCad Local Setup window.
2. Click Edit on the palette.
3. Click Browse to locate the path to the EXPOCAD\expocad.dll file (C:\EXPOCAD\-program). This path enables the Send ID to EXPOCAD button to find the expocad.dll so that it can send the Exhibitor ID to the EXPOCAD event list.
4. Click OK to select the path to Expocad.dll.
5. Enter the EXPOCAD ODBC Data Source that was created using the Microsoft FoxPro driver. This enables iMIS to log into the ExpoCadExp file.
6. Click OK.
7. Click X to close the window.

Exporting Exhibitor Records into EXPOCAD

Exhibitor records can be exported from iMIS into EXPOCAD without an exposition in iMIS being defined, with one exception. If you export prospects, the exposition and the

prospect list need to be defined in iMIS before the export can occur.

To successfully export exhibitor records from iMISFind to the EXPOCAD Exhibitor List (database):

- Both iMISFind and EXPOCAD must be open
- An EXPOCAD event must be open

Opening the Event in EXPOCAD

Before you can export records from iMIS into EXPOCAD, you must open the EXPOCAD event that will use the exported records.

To open the EXPOCAD event

1. To open the event, click Start> Programs> EXPOCAD.
2. Select File> Open to open the EXPOCAD – File Open window.
3. Select an event. The name appears in the File Name field.
4. Click OK to display a message telling you how many other users are on show, and the current user number.
5. Click OK. The EXPOCAD Tool Box and floor plan opens.
6. Close the EXPOCAD Tool Box.

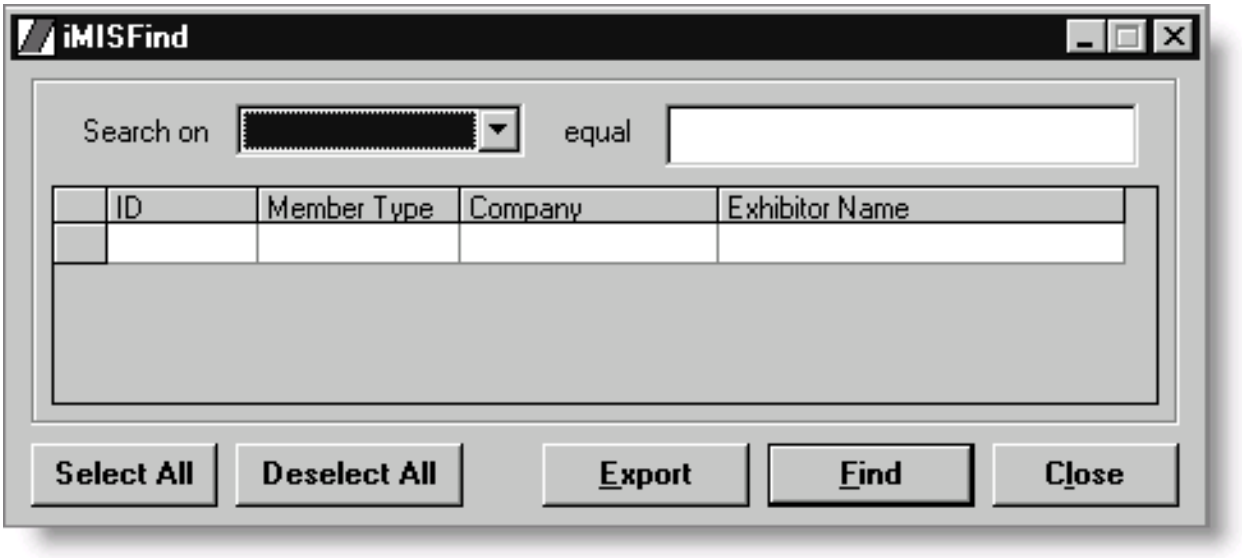
   Note: When exporting records with iMISFind, the Master Exhibitor List is populated with new records. Upon creating the event, if the Master Exhibitor List field was left blank, the Event Exhibitor List field was populated. If both fields were left blank, a default database was created and stored in the Event Exhibitor List when the window was closed.
7. (optional) Select Event> Information to open the EXPOCAD – Event Information window.

- You can click the Event Exhibitor List button to locate the database files. Use this procedure if you are choosing an alternative database for your event.
- Click OK to accept the event information.

Using iMISFind to Retrieve iMIS Records

The iMISFind application is a Visual Basic executable file that allows users to log on to the iMIS database, and retrieve records to import into the EXPOCAD Exhibitor Database.

iMISFind window



Start> Programs> iMISFind

Search on

This is a drop-down list of search options.

Exhibitor Id – Searches on Name.ID

Name – Searches on Name.LAST_FIRST

Company/Institute – Searches on Name.COMPANY_SORT

Prospect on Event – Searches on Activity Type = 'EX-PRO' and exposition code equal to that of the event selected

Member Type – Searches on Name.MEMBER_TYPE

equal

You can enter a search qualifier, for example, if you Search on by Name or Company, you can enter an alphabetic character and the system returns a list of all the last names in database that begin with that character.

Display area

This is where the information found displays

Select All button

Highlights to select all the information in the list display area

Deselect All button

Deselects all the information highlighted

Export button

Exports the selected records into the Exhibitor List in EXPOCAD

Find button

Searches the iMIS database for records that meet the search criteria

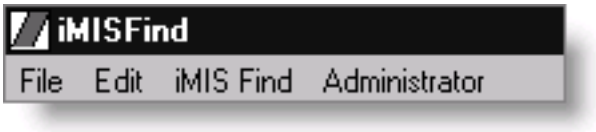
Close button

Closes the iMISFind window

The following fields are exported from iMIS into EXPOCAD

Name.ID	Exhibitor #
Name.Member_Type	Group
Name.COMPANY or Name.FULL_NAME	Name
Name.COMPANY or Name.FULL_NAME	Displayed on Drawing

iMISFind menu commands



- File> Exit – closes the iMISFind Application
- Edit> Cut – deletes the value in equal field
- Edit>Copy – copies the value in equal field
- Edit>Paste – pastes a copied value into equal field
- iMIS Find – Opens the iMISFind window – reopens the window once the Close button has been clicked
- Administrator> Pack ExpoCadExp – allows you to physically remove the deleted records from the database.

  You must have exclusive access to the file as well as an Exposition Management authorization level of 8 or higher in order to run this option. It is recommended that an administrator occasionally run this option to remove the deleted records from the ExpoCadExp file. This will prevent the ExpoCadExp file from getting too large.

To export iMIS records into EXPOCAD

1. To open iMISFind, click Start> Programs> iMISFind.
2. Log on to iMISFind.
3. Select a find option from the Search on drop-down list.
4. Enter a value in the equal field to assist with the system find. For example, if you select Prospect on Event as a find option, enter the exposition codes to find prospect exhibitors for that exposition.
5. Click Find. The records that match the search criteria display in the window.
6. To select records to be exported,

1. Highlight one record,
2. Press Ctrl and click on each record to select, or
3. Click Select All to select all records, as shown in the following window.

4. Click Export. When the export is complete, a message displays telling you that the export is successful.

   Note:

- If a company record contains a carriage return in iMIS, it is exported into EXPOCAD with a space.
- Records retrieved from the Name.COMPANY and Name.FULL_NAME tables are truncated to 50 characters when exported into EXPOCAD.
- Any exhibitor information exported to EXPOCAD should not be edited in EXPOCAD. Records should be edited in iMIS. After a record is edited, you can use iMISFind or click Send ID to EXPOCAD to export the updated record to EXPOCAD.

8. Click OK. Close the iMISFind application.
9. (optional) Close the EXPOCAD application.

Importing EXPOCAD Booth Data into iMIS

Booth information is stored as event activities in the ExpoCadExp.dbf file, which is imported into iMIS. You can view the records to be imported by running the ExpoCadExp Crystal report. The report prints all records in the ExpoCadExp.dbf file that have not yet been processed. In order for the event activities to import into iMIS, an exposition with the same name as the event must be set up in iMIS.

Importing Booth Information into iMIS

Make sure you have defined an iMIS exposition with the same name as the EXPOCAD event. If a corresponding exposition is not defined in iMIS, the event activities will be deleted from the ExpoCadExp.dbf file after importing the EXPOCAD records.

Booth information from EXPOCAD is imported into iMIS by using the EXPOCAD Import window.

To import booth information into iMIS

The steps below assume that batch control is enabled in iMIS.

1. From iMIS, select Expo> Reports.

2. Select EXPOCAD from the Report Types area.
3. Select ExpoCadExp from the Available Reports area.
4. Select your report destination to screen and click Run to display the report.
5. After you have reviewed the report, select Expo> EXPOCAD Import.

   Note: If Batch Control is disabled, you will be prompted to create a batch.
6. The EXPOCAD Import window opens.
7. Click Import.

- If the import is in use by another user, a message displays telling you to try again when that import is complete. Click OK to close the message.

8. A system message displays Processing Order… Stand by. When the process is complete, a message displays telling you that the import is complete.
9. Click OK to display the Import Error List.

- If all EXPOCAD activities were imported, the Import Error List is blank.
- If errors occurred, they will display in the Import Error List.

To print the Import Error List

You can print the Import Error List one of two ways:

- To print all errors on the list, click Select All and click Print.
- To print selected errors on the list, press Ctrl and select the error or errors.

Note: The Import Error List (Expo_EXPOCADError.rpt) cannot be printed to the Print Manager (File> Print Manager).

To fix an error on the Import Error List

If any EXPOCAD activity did not import, the Import Error List displays one line for each activity that was not imported. A description of the error displays next to the record.

The following table provides a list of the error descriptions with a solution to fix the error. Once you fix the error, rerun the EXPOCAD Import. The activities will import and then be removed from the Import Error List.

Name ID not found	Membership> Enter/Edit Member, verify that ID exists
Exposition Status is not Active	Expo> Define/Plan Exposition, double-click exposition, Status must be A
Last First Name and Company name are both blank	Membership> Enter/Edit Member, find member ID. Record must have a Last Name or First Name or Company Name
Product Mapping does not exist (Each Booth Type will be specified at the start of the error message)	Expo> Define/Plan Exposition, double-click exposition, click More and select EXPOCAD Product Mapping and add the product mappings for the Booth Type(s) that are missing
Booth Dimension is not entered (Each Booth Type will be specified at the start of the error message)	Expo> Define/Plan Exposition, double-click exposition, select booth product, click Edit. Booth Length and/or Booth Width are missing
Product Pricing does not exist	Expo> Define/Plan Exposition, double-click exposition, select booth product, click Edit, click More and select Fees. Product Fees are missing
Booth has not been rented	Rent a booth in EXPOCAD. Delete the Product Mapping in iMIS. Run the import from EXPOCAD to iMIS. Error report will show that Product Mapping does not exist. Delete the error from the list. Unrent the booth in EXPOCAD. Add the Product Mapping in iMIS. Run the import from EXPOCAD to iMIS.

Booth has been rented	Rent a booth in EXPOCAD. Run the import from EXPOCAD to iMIS. Delete the Product Mapping in iMIS. Un-rent the booth in EXPOCAD. Run the import from EXPOCAD to iMIS. Delete the error from the list. Add the Product Mapping in iMIS. Rent the booth again in EXPOCAD. Run the import from EXPOCAD to iMIS.
Previous transaction failed	Indicates that an initial transaction has failed. The initial transactions will have one of the above Error Descriptions. If one transaction for a booth fails, any additional transaction belonging to that booth will also fail.
Unable to find exhibitor ID for current booth	Indicates that data has been altered.
Unable to find booth type	Indicates that data has been altered.
Order does not exist	Indicates that data has been altered.

To delete a record from the Import Error List

To delete a record from the list, select the record and click Delete. This button is disabled if you do not have an iMIS Expo Mgmt authorization level of 8.

Note: Deleting a record from the Import Error List will be rare. For example, a booth was rented in EXPOCAD to an exhibitor that was manually added through EXPOCAD and assigned an ID of 899. ID 899 does not exist in iMIS, and the error description "Name ID not found" has displayed on the Import Error List. In order to fix this error, you would add ID 899 to iMIS or un-rent the booth in EXPOCAD and then rerun the EXPOCAD Import. If you were to un-rent the booth, two activity records for ID 899 would display, one for the rented booth and one for the un-rented booth. These records would need to be deleted from the Import Error List.

1. Select line items and click the Delete button. A message displays asking if you're sure you want to continue with the deletion.
2. Click Yes to delete the selected line.
3. Click Close.

Reviewing the iMIS and EXPOCAD Fields

There are several differences in the fields that are used for an iMIS exposition and EXPOCAD exposition. The field differences are shown with examples.

Order_Lines

In an iMIS exposition, Order_Lines for each booth number are maintained. In an EXPOCAD exposition, Order_Lines for each product are maintained.

Example: Order_Lines for an iMIS Exposition for booths 101 and 102

Order_Number	Line_Number	Quantity_Ordered	Lot_Serial	Booth_Numbers
1	1	2		101,102
1	1.01	1	101	101,102
1	1.02	1	102	101,102

Example: Order_Lines for an EXPOCAD Exposition for booths 101 and 102 (when 101 and 102 are the same product code) with AREA system setup

Order_Number	Line_Number	Quantity_Ordered	Booth_Numbers
1	1	200	101,102

Example: Order_Lines for an EXPOCAD Exposition for booth 103 and the corresponding Premium product

Order_Number	Product_Code	Location	Booth_Numbers
2	HIST00/BOOTH		103
2	HIST00/CORNER	EXPOCAD	

Exhb_Booth

In an EXPOCAD exposition, Exhb_Booth.Booth_Units will reflect the quantity ordered:

Example: Exhb_Booth for an iMIS Exposition for booths 101 and 102

Exhb_ID	Meet_ID	Booth_Number	Booth_Units
124	HIST00	101	1
124	HIST00	102	1

Example: Exhb_Booth for an EXPOCAD Exposition for booths 101 and 102 with QUANTITY system setup

Exhb_ID	Meet_ID	Booth_Number	Booth_Units
124	HIST00	101	1
124	HIST00	102	1

Example: Exhb_Booth for an EXPOCAD Exposition for booths 101 (200 Sq Units) and 102 (100 Sq Units) with AREA system setup

Exhb_ID	Meet_ID	Booth_Number	Booth_Units
124	HIST00	101	200
124	HIST00	102	100

Defining an Exposition (Event) in iMIS

An exposition is categorized as either an iMIS or and EXPOCAD exposition. An exposition with an iMIS category will not use the EXPOCAD program. An exposition with an EXPOCAD category will enable the EXPOCAD Product Mapping option, allowing booth selection and assignments to occur in EXPOCAD, while maintaining billing and prospecting capabilities in iMIS.

To define an EXPOCAD exposition, you will do the following:

- Create an exposition with an EXPOCAD category
- Define exposition products and pricing

- Define product mapping

Defining an EXPOCAD Exposition (Event) in iMIS

When you define an exposition in iMIS, the Exposition Category selected determines whether the exposition is an iMIS exposition or an EXPOCAD exposition. You will define an exposition with an iMIS or EXPOCAD category in the Exposition Definition window.

iMIS features disabled when defining an EXPOCAD exposition

When you define an EXPOCAD exposition, the following occurs in iMIS:

- Product conflict checking is disabled. Products can still be set up as conflicting, but the checking is disabled. (Select Expo> Table Maintenance> Exhibited Product Maintenance, select a product, click Conflict List)
- Company conflict checking is disabled. Companies can still be set up as conflicting, but the checking is disabled. (Select Expo> Order Processing, find exposition, find exhibitor, click More, select Company Conflicts)
- Booth preferences are disabled. (Select Expo> Order Processing, click Insert, select exposition with a P status, insert exhibitor, double-click a booth product)
- Booth Waitlist is grayed out. (Select Expo> Order Processing, find exposition, find exhibitor, click More, select Booth Waitlist)
- Booth Proximity is grayed out. (Select Expo> Define/Plan Exposition, double-click exposition, click More, select Booth Proximity)
- Link is disabled. (Select Expo> Define/Plan Exposition, double-click exposition, select product code, click Edit, click More)
- Booth button in the Exposition Product Detail window has been removed. (Select Expo> Define/Plan Exposition, double-click on exposition, highlight booth product, click Edit)
- Max. Available field in the Exposition Product Detail window has been removed. (Select Expo> Define/Plan Exposition, double-click on exposition, highlight booth product, click Edit)

- Reserve Booth button in the Expo Sales window has been removed. (Select Expo> Prospect Management/Sales, choose exposition, highlight prospect, click Exhibitor Sales)
- Exposition code will not appear on the Booth Preference Management Expo drop-down list. (Select Expo> Booth Preference Mgmt, click Expo drop-down list)
- Exposition code will not show in the Exposition Search window on the Wait List Processing screen. (Select Expo> Wait List Processing, click Find Exposition)
- The Transfer/Substitution feature for an Exposition registration issues a system message indicating that Transfer/Substitution is not allowed for an Exposition that is EXPOCAD category. (Select Expo> Order Processing, find exposition, find exhibitor, click Transfer/Substitution button)

To define an EXPOCAD exposition (event) in iMIS

1. In iMIS, select Expo> Define/Plan Exposition to open the Available Expositions window.
2. Click Insert in the palette to open the Exposition Definition window.

   Note: Expositions can also be created with the clone function. EXPOCAD expositions that are cloned will include EXPOCAD Product Mapping.
3. Enter information in the following fields:

- Exposition code
- Title
- Begin Date
- End Date
- Status
- Early Cutoff (optional)
- Reg Cutoff (optional)

4. Enable the EXPOCAD option for the Exposition Category.
5. Click OK.

Note: Defining an EXPOCAD exposition in iMIS will not automatically create an event in EXPOCAD.

To change an exposition category

The exposition category can be updated from iMIS to EXPOCAD, or from EXPOCAD to iMIS as long as orders have not been entered for the exposition. After orders have been entered, the category may not be updated.

1. Select Expo> Define/Plan Exposition to open the Available Expositions window.
2. Double-click the exposition you want to change. The Exposition Definition window opens.
3. Click the Edit button on the palette.
4. Enable the appropriate Exposition Category.

   Note: If you change the category from iMIS to EXPOCAD and there is booth inventory or a wait list, a message warns that changing Exposition Category from iMIS to EXPOCAD will result in deletion of existing Booth Inventory and Wait Lists for the current Exposition, and asks whether you wish to proceed. Click Yes or No.
5. Click OK.

   Changing an Exposition Category from iMIS to EXPOCAD will result in the following system changes for the selected exposition:

- Deletes Booth Inventory (Product_Lot records for current exposition)
- Deletes Wait List (Exhb_Wait_List records for current exposition)
- Deletes Booth Preferences (Exhb_Booth records for current exposition)
- Sets Max. Available Booth to zero (Product_Function.MAXIMUM_ATTENDANCE)

Changing an Exposition Category from EXPOCAD to iMIS will result in the following system change for the selected exposition:

- Deletes all EXPOCAD Product Mapping (ExpoCad_Prod records for current exhibition)

Defining Exposition Products and Pricing

At this point, you have created an iMIS exposition and defined it as EXPOCAD event. You have also created the EXPOCAD floor plan (graphical layout). You will now add products and fees to the iMIS exposition. These products will reflect the booths set up in EXPOCAD, as well as any additional products needed for the exposition.

To define booth products and pricing

The booth product and booth pricing you enter will depend on whether you selected Quantity or Area (Square Units) as the measurement to use with your orders (Expo> System Setup, ExpoCad button). For example, if you selected Quantity as the measurement, and you had a booth defined as 10' x 10' with a fee of $2,000.00. The total cost charged for renting three booths would be $6,000.00.

1. Open the Exposition Definition window (select Expo> Define/Plan Exposition, double-click exposition).
2. Click Insert in the window. The Exposition Product Detail window opens.
3. Enter a unique Product Code (for example, BOOTH).
4. Enter a Title of up to 60 alphanumeric characters (for example, 10 x 10 Booth).
5. (optional) Enter a Product Description (for example, 10 x 10 Booth).
6. The data entered in the Booth Length and Booth Width fields are dependent on the measurement selected in the ExpoCad System Options window (Expo> System Setup, ExpoCad button). If the measurement used for orders is based on:

- Quantity, enter the Booth Length and Booth Width. If you omit the booth length and booth width, a system message indicating that this is required will display.
- Area (Square Units), leave the Booth Length and Booth Width blank.

7. Enable the Booth option to designate the type of product.
8. Click More and select Fees. The Exposition Booth & Product Fees window opens.

9. The fees entered for a Booth type product are dependent on the measurement selected in the ExpoCad System Options window (Expo> System Setup, ExpoCad button). If the measurement used for orders is based on:

- Quantity, enter the price per booth. In the following example, we set the rate for a 10' x 10' booth for a member to $2,000.00 (early registration), $2,500.00 (regular registration), and $3,000.00 (late registration).
- Area (Square Units), enter the price per square unit. In the following example, we set the rate for a 100 square unit booth to 20.00 per square unit (members early registration). The total cost for a 100 square unit booth would be calculated by multiplying 20 by 100 square units for a total cost of $2,000.00).

10. Click OK.
11. Click X to close the Exposition Booth & Product Fees window.
12. Click X to close the Exposition Product Detail window.
13. Repeat the process to enter additional products.

To define other products and pricing

Products other than booth products are defined with a type of Other or Paid Pass. For example, a registration fee may be defined with a type of Other.

Products with a type of Other or Paid Pass can also be used in the EXPOCAD Product Mapping window as Premiums. For example, you could set up one iMIS booth product code that is the base booth and fee, the set up additional charges with a type of Other to be used as Premium codes.

1. Open the Exposition Definition window (select Expo> Define/Plan Exposition, double-click exposition).
2. Click Insert in the window. The Exposition Product Detail window opens.
3. Enter a unique Product Code (for example, CORNERFEE).
4. Enter a Title of up to 60 alphanumeric characters (for example, Corner Fee).

5. (optional) Enter a Product Description (for example, Additional fee for corner booth).
6. Enable the Paid Pass, or Other option to designate the type of product.

   Note: Products that are going to be used as Premium products on the EXPOCAD Product Mapping window must be enabled as Other or Paid Pass.

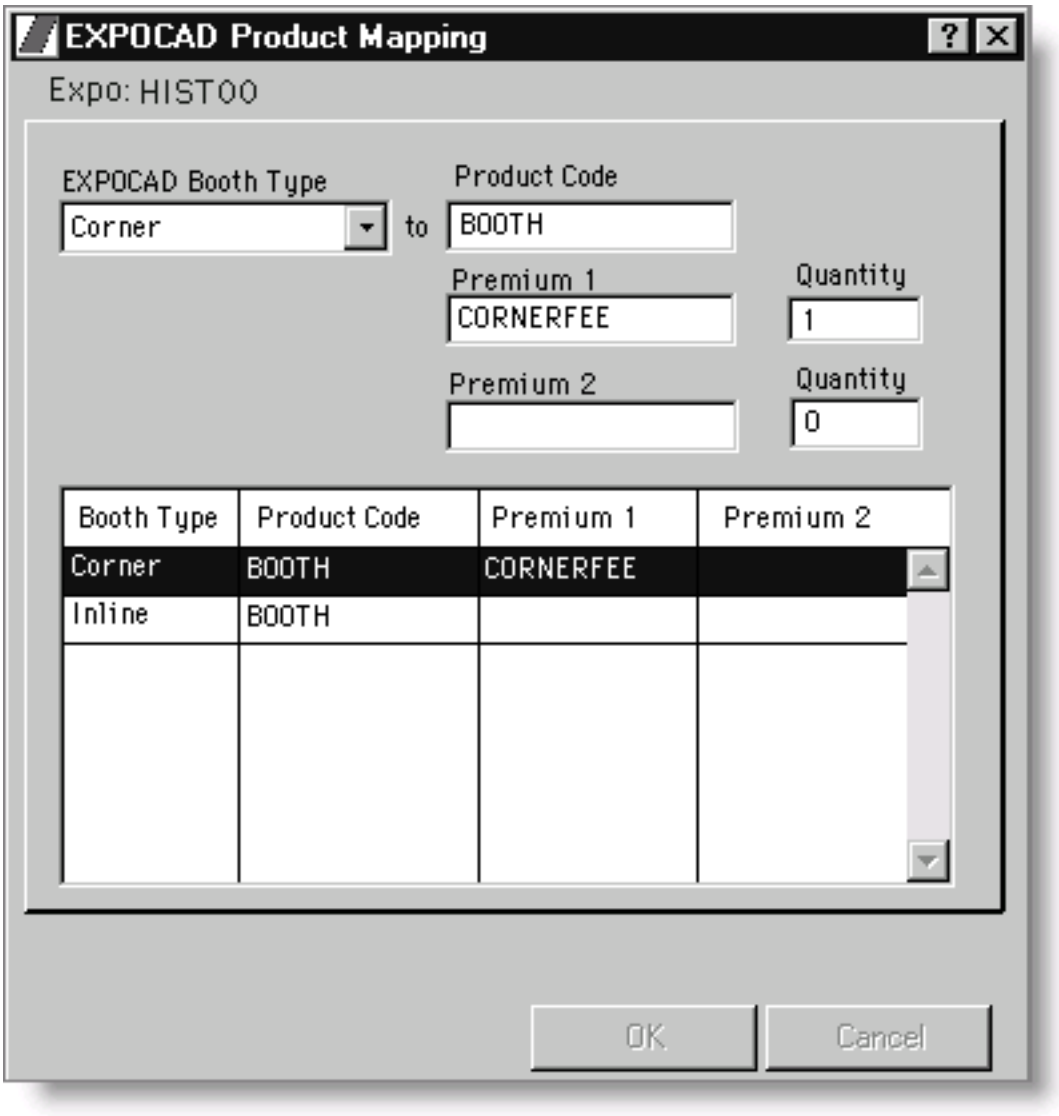
   Note: Once Paid Pass or Other is selected, the Booth Width and Booth Length fields are disabled.
7. Click More and select Fees.
8. The fees entered for a Paid Pass or Other type product use pricing based on Quantity, regardless of the measurement selected in the ExpoCad System Options window (Expo> System Setup, ExpoCad button). In the following example, we set the rate for a corner booth fee to $1000.00 (regular default registration)
9. Click OK.
10. Click X to close the Exposition Booth & Product Fees window.
11. Click X to close the Exposition Product Detail window.
12. Repeat the process to enter additional products.

Defining Product Mapping

The booth information in EXPOCAD must be mapped to an iMIS exposition booth product code. The mapping is done in the EXPOCAD Product Mapping window. Each EXPOCAD Booth Type can be mapped to one booth product code and up to two premium codes.

For example, you may want to set up one iMIS booth product code for each EXPOCAD Booth Type, so there is a one-to-one correlation. In this case, you may or may not use the Premium codes. Or, you could set up one iMIS booth product code that is the basic booth and fee, then set up additional charges with a type of Other to be used as Premium codes.

After the product mapping has been set up and exposition orders have been added, do not edit the product mapping. EXPOCAD uses this setup for renting and un-renting booths.



Expo> Define/Plan Exposition, double-click an exposition, click More, EXPOCAD Product Mapping

EXPOCAD Booth Type

A drop-down list of Booth Types used in EXPOCAD

- Custom – Non-rectangular booths
- These booths have only an area dimension. They do not have horizontal and vertical dimensions.
- Island – A single, rectangular booth
- This booth has 4 open corners.
- Inline – A booth with no open corners
- Corner – A booth with one open corner
- Peninsula – Anything not covered above
- The end of a single row is considered a peninsula, not a corner, since it has two open corners.
- Aisle Booth – Booth space that is rented, but no actual booth is present. For example, if your floor plan does not have room to configure an island, you may want to rent 2 booths at the end of a single row and eliminate the inline booth, leaving an aisle between the peninsula booth (or end) and the rest of the row.

  Product Code

- List of iMIS product codes identified as Booth that have Booth Length and Booth Width entered in the Exposition Product Detail window for this exposition when Expo> System Setup, ExpoCad is set to Quantity
- List of iMIS product codes identified as Booth entered in the Exposition Product Detail window for this exposition when Expo> System Setup, ExpoCad is set to Area (Square Units)

  Premium 1

  This field shows a list of product codes identified as Other or Paid Pass in the Exposition Product Detail window for this exposition. If you have only one basic booth product code in iMIS, you can specify a Premium code to further identify the booth. For example, you might have a basic booth, but charge an additional fee for a corner. In the Exposition

Product Detail window, the corner product code would have the Other option enabled, and you would choose it as a Premium product code. Each product can have up to two premiums.

Quantity

This is the number of Premium 1 products to associate with this EXPOCAD Booth Type and Product Code. This is a required field if the Premium1 field is used.

Premium 2

This field shows a list of product codes identified as Other or Paid Pass in the Exposition Product Detail window for this exposition. If you have only one basic booth product code in iMIS, you can specify a Premium code to further identify the booth. For example, you might have a basic booth but charge an additional fee for a corner. In the Exposition Product Detail window, the corner product code would have the Other option enabled, and you would choose it as a Premium product code. Each product can have up to two Premiums.

Quantity

This is the number of Premium 2 products to associate with this EXPOCAD Booth Type and Product Code. This is a required field if the Premium 2 field is used.

Booth Type

Displays the mapped Booth Types available for this exposition (event)

Product Code

Displays the booth product codes that are mapped to Booth Types for this exposition (event)

Premium1

Displays the ‘Other’ or ‘Paid Pass’ product codes that are mapped to booth product codes for this exposition

Premium2

Displays the ‘Other’ or ‘Paid Pass’ product codes that are mapped to booth product codes for this exposition

To define product mapping

Product mapping allows you to map EXPOCAD Booth Types to iMIS booth products.

1. Open the Exposition Definition window (select Expo> Define/Plan Exposition, double-click exposition).
2. Click More in the Exposition Definition window and select EXPOCAD Product Mapping to open the EXPOCAD Product Mapping window.
3. Click Insert on the palette.
4. Select an EXPOCAD Booth Type from the drop-down list.
5. Press Ctrl+ L on the keyboard to open the list of available booth Product Codes.
6. Double-click the booth product code for the EXPOCAD Booth Type.
7. (optional) Press Ctrl+L on the keyboard to open the list of available Other and Paid Pass Product Codes in the Premium 1 field.

1. Double-click the Premium product for the EXPOCAD Booth Type and iMIS Product Code.
2. Enter a quantity for Premium 1. Press Tab
3. (optional) Press Ctrl+L on the keyboard to open the list of available Other and Paid Pass Product Codes in the Premium 2 field.

1. Double-click the Premium product for the EXPOCAD Booth Type and iMIS Product Code.
2. Enter a quantity for Premium 2.
3. Click OK.
4. Repeat the process to map all EXPOCAD Booth Types to iMIS booth products.

Note: Once the booth product mapping has been set up and orders have been placed, the mapping should not be changed. Changing the mapping after an order is placed may cause the un-rent booth process to take out a quantity from an incorrect product code.

Creating Activities in EXPOCAD

As activities are created in EXPOCAD, the ExpoCadExp.dbf file is updated. The following processes are reported when the ExpoCadExp file is updated:

- Rent Booth
- Un-rent Booth
- Booth Num Change
- Booth Class Change for Aisle Class

Renting Booths in EXPOCAD

Renting booths in EXPOCAD updates the ExpoCadExp.dbf file. This file is located in the same folder as the Master Exhibitor and/or Event Exhibitor dbf file. The file is updated as follows:

- COUNT_VAL field is equal to the last UNIQUEID field
- ORIG_BOOTH field holds the booth number
- BOOTH_SIZE is the total booth area
- BOOTH_TYPE is the type of booth rented
- EXHB_ID is the Exhibitor ID
- EVENT_NAME is the name of the Event in EXPOCAD and the name of the Exposition in iMIS
- PROC_DESC displays Rent Booth
- INSERT_DAT is the date and time that the booth was rented in EXPOCAD

Note: It is not recommended that the Booth Type be changed after a booth has been rented. The booth type is the key to product mapping in iMIS. If you change the Booth Type in EXPOCAD, the ExpoCadExp.dbf will not be updated.

Note: Do not select File> Event Copy after a booth has been rented, as this will prevent an activity record from being inserted in the ExpoCadExp.dbf file for the new event.

To rent booths

The booth number needs to be selected in order to rent a booth. For more detailed instructions, see the EXPOCAD User's Guide.

1. Open the EXPOCAD event (select File> Open File, highlight the event and click OK).
2. Click OK on the system message. Close the EXPOCAD Tool Box.
3. Select the booth number for the booth you are going to rent.
4. Select Booth> Rent Booth. The EXPOCAD – Rent Booth window opens. The company names from the Event Exhibitor List file displays. The booth number selected displays in the title bar.
5. Highlight the company that will be renting the booth.
6. Click the OK to Rent button. The EXPOCAD Rent Booth window closes and the company name selected displays with the booth number on the floor plan.
7. Repeat the process to rent additional booths.
8. Select File> Close to close the event.

Un-renting Booths in EXPOCAD

When you un-rent booths, the EXPOCADEXP.dbf file is updated with the following:

- COUNT_VAL field is equal to the last UNIQUEID field
- ORIG_BOOTH field holds the booth number
- BOOTH_SIZE is the total booth area
- BOOTH_TYPE is deleted
- EXHB_ID is deleted
- EVENT_NAME is the name of the Event in EXPOCAD and the name of the EXPOSITION in iMIS

- PROC_DESC displays Un-rent Booth
- INSERT_DAT is the date and time that the booth was un-rented in EXPOCAD

To un-rent booths

The booth number needs to be selected in order to un-rent a booth. For more detailed instructions, see the EXPOCAD User's Guide.

1. Open the EXPOCAD event (select File> Open File, highlight the event and click OK).
2. Click OK on the system message. Close the EXPOCAD Tool Box.
3. Select the booth number for the booth you are going to un-rent.
4. Select Booth> Unrent Booth. The company name is deleted from the booth.
5. Repeat the process to un-rent additional booths.
6. Select File> Close to close the event.

Changing the Booth Number in EXPOCAD

As booth numbers are changed, the EXPOCADEXP.dbf file is updated with the following:

- COUNT_VAL field is equal to the last UNIQUEID field
- UNIQUEID field increments by one
- ORIG_BOOTH field holds the original booth number
- NEW_BOOTH field holds the new booth number
- BOOTH_SIZE is the total booth area
- BOOTH_TYPE holds the Booth Type
- EXHB_ID holds the Exhibitor ID
- EVENT_NAME is the name of the Event in EXPOCAD and the name of the EXPOSITION in iMIS
- PROC_DESC displays Booth Number Change
- INSERT_DAT is the date and time that the booth number was changed in EXPOCAD

To change a booth number

The booth number needs to be selected in order to change the number. For detailed instructions, see the EXPOCAD User's Guide.

1. Open the EXPOCAD event (select File> Open File, highlight the event and click OK).
2. Click OK on the system message. Close the EXPOCAD Tool Box.
3. Select the booth number you want to change.
4. Select Booth> Change Booth Number to display the EXPOCAD – Change Booth Number window.
5. Enter the new booth number in the to field.
6. Click OK.
7. Repeat the process to change additional booth numbers.
8. Select File> Close to close the event.

Changing the Booth Class in EXPOCAD

As booth class for the Aisle booth are changed, the EXPOCADEXP.dbf file is updated with the following:

- COUNT_VAL field is equal to the last UNIQUEID field
- UNIQUEID field increments by one
- ORIG_BOOTH field holds the original booth number
- BOOTH_SIZE is the total booth area.
- BOOTH_TYPE holds the new Booth Type
- EXHB_ID holds the Exhibitor ID
- EVENT_NAME is the name of the Event in EXPOCAD and the name of the EXPOSITION in iMIS

- PROC_DESC displays Booth Class Change
- INSERT_DAT is the date and time that the booth number was changed in EXPOCAD

To change the booth class

The booth number needs to be selected in order to change the class. For more detailed instructions, see the EXPOCAD User's Guide.

1. Open the EXPOCAD event (select File> Open File, highlight the event, and click OK).
2. Click OK on the system message. Close the EXPOCAD Tool Box.
3. Select the booth number for which you want to change the booth class.
4. Select Booth> Booth Class. The EXPOCAD – Set Booth Class window opens.
5. Click the appropriate button to select the new booth class.
6. Repeat the process to set additional booth classes.
7. Select File> Close to close the event.

EXPOCAD Expositions in iMIS

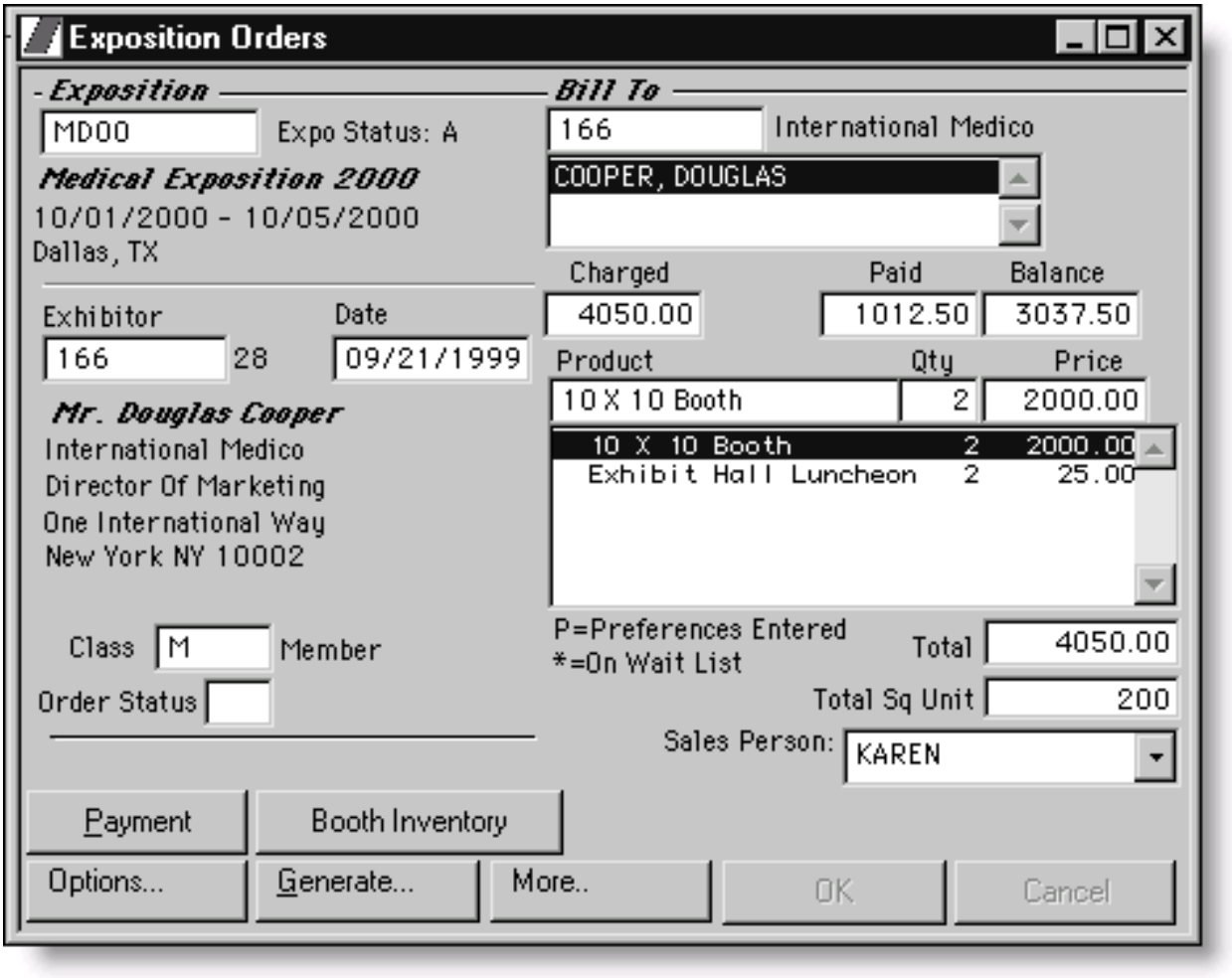
Once the booth information has been imported into iMIS, the order can be viewed in iMIS. An order can also be processed in iMIS first, the ID sent to EXPOCAD, and then a booth rented in EXPOCAD. You can also:

- Edit an EXPOCAD order
- Cancel an EXPOCAD order
- Close an EXPOCAD exposition

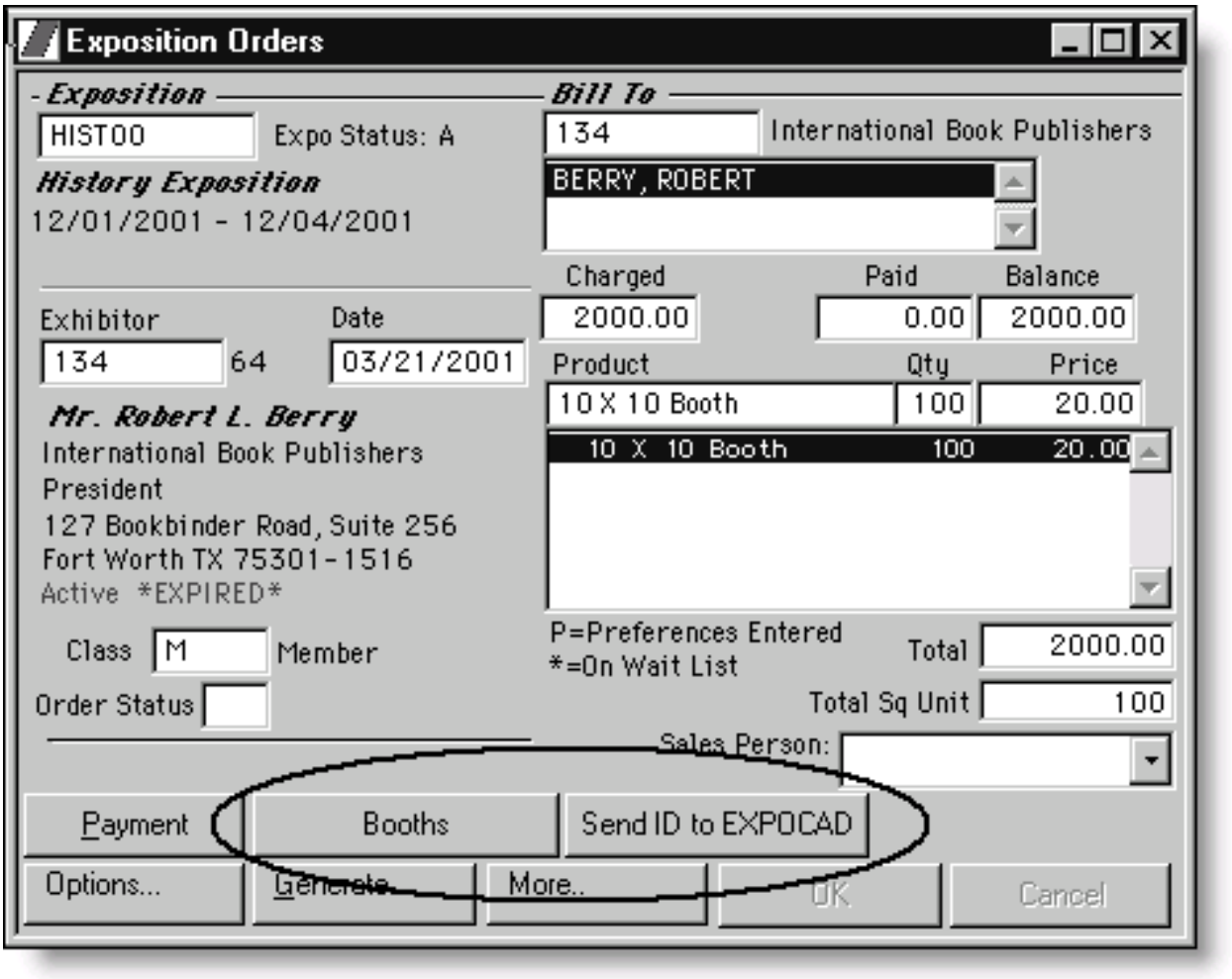
Reviewing changes in the Exposition Orders Window

If you are inserting a new EXPOCAD order or viewing an existing EXPOCAD order, the Exposition Orders window will show the following changes:

- In place of a Booth Inventory button, there is a Booths button.
- There is a Send ID to EXPOCAD button, which allows you to send the current Exhibitor ID to the EXPOCAD Exhibitor database. When this button is clicked, iMIS uses the EXPOCAD Application Path that was set in the ExpoCad Local Setup window (Expo> EXPOCAD Local Setup) to find the expocad.dll. The expocad.dll will then update the Exhibitor database with the Name.ID and Name.COMPANY_SORT or Name.FULL_ NAME for the exhibitor.



Sample Exposition Orders window for an iMIS category exposition order



Sample Exposition Orders window for an EXPOCAD category exposition order

Processing an EXPOCAD Order in iMIS

Exposition orders can be initiated in iMIS with the Exhibitor ID, Member Type, and Company or Full Name exported to EXPOCAD using the Send ID to EXPOCAD button.

To enter an EXPOCAD order

1. Select Expo> Order Processing to open the Exposition Orders window.
2. Click Insert on the palette.
3. Enter the Exposition Code and Tab to the Exhibitor field or press Tab three times to select an exposition.

4. Enter the Exhibitor Id or press Ctrl+L to find an exhibitor's record in the database. The exhibitor's name and address information displays. If the exhibitor is not in the Member database, press Tab in the Exhibitor Id field to open the Name/Address Info window and add a record.
5. (optional) Enter the Date. The date defaults to the batch date if batch control is used; otherwise, the date defaults to the system date.
6. (optional) Override the Class code if necessary.

   Note: The following are three scenarios for defining Exhibitor Classes:

- Let the Exhibitor Classes default to the M = Member or NM = Non-Member Types in the Member Types Table in Customer Management. Here, all exhibitors are either a Member or Non-Member based on their member record.
- Map Member Types to Exhibitor Classes. Here, you map all or only key Member Types (such as M = Member, NM = Non-Member, and CM = Company Member).
- Define your own Exhibitor Classes without using Member Types. Here, you must override the M = Member and/or NM = Non-Member status at order entry, entering the appropriate Exhibitor Class.

7. Enter the Bill To information if it is different than the name and address that displays in the window, or press Ctrl+L and select a value.
8. (optional) Override the Bill To Address information, if necessary.
9. To continue the order, select from one of the following options:

- If the order will consist of booth products only, click OK to update the order. The Product and Qty will be imported from EXPOCAD.
- If the order will consist of non-booth products as well as booth products, for example, a main registration:

10. Double-click the product and enter a quantity in the Qty field.
11. Click OK.

12. Click Send ID to EXPOCAD.
    - If the event is set up in EXPOCAD, but EXPOCAD is not running, a message displays asking if you would like to start EXPOCAD now. Click Yes.
    - If the event is not set up in EXPOCAD, a message displays telling you that the Exhibitor ID could not be sent to EXPOCAD because the matching Event could not be found in EXPOCAD. Click OK. The event will need to be set up in EXPOCAD.
13. In EXPOCAD, select File> Open to open the event you are registering for in iMIS.
14. In the EXPOCAD – File Open window, highlight the event and click OK. Click OK on the system message. The event is now open in EXPOCAD.
15. In iMIS, click OK when you see a message asking you to please click the Send ID to EXPOCAD button again to send the Exhibitor ID.
16. In iMIS, click Send ID to EXPOCAD. A message displays telling you that the specific Exhibitor ID number has been sent to EXPOCAD.
17. You can now assign booths to this exhibitor in EXPOCAD. See Renting Booths in EXPOCAD.

Viewing an EXPOCAD Order

To view an EXPOCAD order

1. Select Expo> Order Processing to open the Exposition Orders window.
2. Click Find on the palette.
3. Enter Exposition code or press Tab three times to open the Expo Find window, select the exposition, and click OK.
4. Enter the Exhibitor ID or press Tab three times to search for the exhibitor.
5. The Qty field will differ depending on the booth measurement option selected in the iMIS system setup.
    - If booths are based on Quantity, the Qty field represents the total square units in EXPOCAD divided by the total dimensions in iMIS. For example, if the square units in

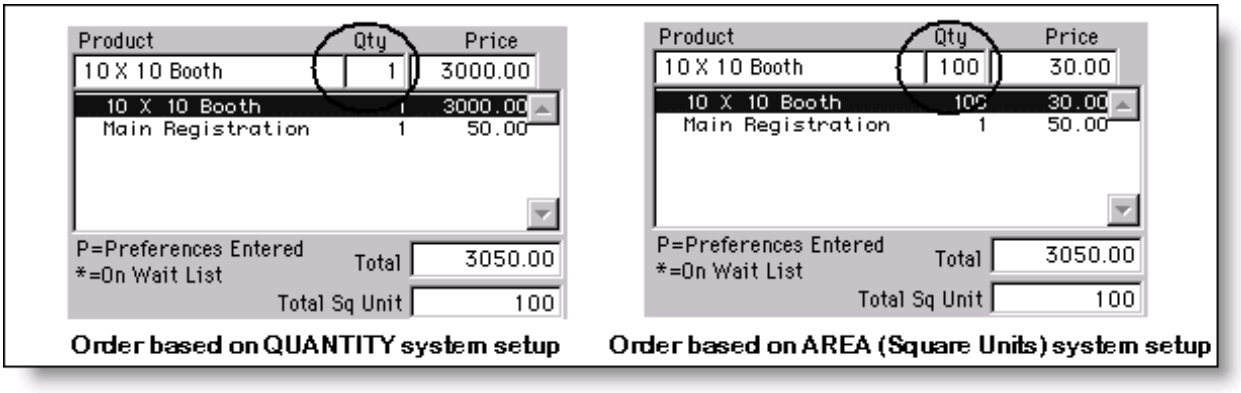
EXPOCAD are defined as 100 and the total dimensions in iMIS are 100 (10 x 10), then the quantity would be 1 (100¸100).

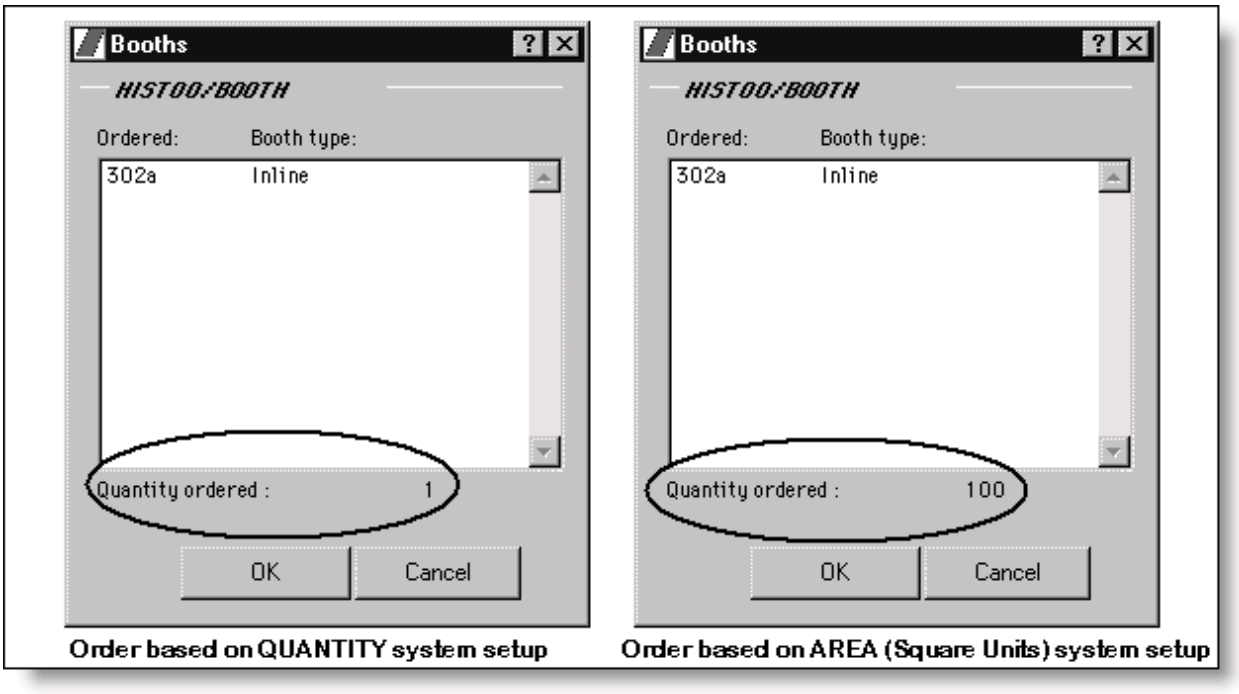
- If booths are based on Area (Square Units), the Qty field represents the total area of booth spaced rented in EXPOCAD.

6. Click Booths to view the booth number and booth type per order line.
7. The Quantity Ordered field will differ depending on the booth measurement option selected in the iMIS system setup. This window is for viewing purposes only. Only product codes that were defined as a Booth will display booth numbers.

- If booths are based on Quantity, the Qty field represents the total square units in EXPOCAD divided by the total dimensions in iMIS. For example, if the square units in EXPOCAD are defined as 1000 and the total dimensions in iMIS are 100 (10 x 10), then the quantity would be 1 (100¸100).
- If booths are based on Area (Square Units), the Quantity Ordered field reflects the total area for this booth.

8. Click OK to close the Booths window.





Viewing EXPOCAD Booth Changes

Use the Booth Change History window to view a history of all booth changes related to a particular exhibitor. Each transaction/change in EXPOCAD creates four Booth History records: Booth Number Change, Booth Units Change, Booth Dimension Change, and Booth Type Change. Booth Type Change has been added for EXPOCAD expositions. The Date shown is the date the booth activity took place in EXPOCAD, not the date of the import.

To view EXPOCAD booth changes

1. Select Expo> Exhibitor Information, click Find Exposition, double-click an exposition, and double-click an exhibitor to open the Exhibitor Information window.
2. Click More and select Booth Changes to open the Booth Change History window.

- If booths are based on Quantity, the Booth Units Change line item (in the Change List box) represents the total square units in EXPOCAD divided by the total dimensions in iMIS. For example, if the square units in EXPOCAD are defined as 1000 and the total dimensions in iMIS are 100 (10 x 10), then the quantity would be 1 (100¸100).

- If booths are based on Area (Square Units), the Booth Units Change line item (in the Change List box) reflects the total square units.

3. Click an item in the Change List to see a description of any booth changes, as well as who made the changes in the Description area in the bottom of the window.
4. Click Close to return to the Exhibitor Information window.

Editing an EXPOCAD Order in iMIS

After an EXPOCAD order is imported into iMIS, the Product and Qty fields for a booth product cannot be edited in iMIS. Changes in booths or booth quantity must be made in EXPOCAD, and then imported into iMIS through the ExpoCadExp file.

Products designated as “Other” or “Paid Pass” (products not rented through EXPOCAD) can be edited within iMIS.

All other information on the order, such as Payment Schedule and Address information is maintained and edited in iMIS.

In addition, a Transfer/Substitution is not allowed for an EXPOCAD exposition order. A message indicating that this is not allowed will display if you click the Transfer/Substitution button.

Canceling an EXPOCAD Order in iMIS

Before you can cancel an order in iMIS, you must unrent the booths in EXPOCAD. If you try to cancel an order in iMIS that has booths assigned, a message displays stating that you cannot cancel an EXPOCAD registration that has imported booths from EXPOCAD until you unrent the booths in EXPOCAD.

Closing an EXPOCAD Exposition in iMIS

Closing an EXPOCAD exposition in iMIS does not close the event in EXPOCAD. Closing an EXPOCAD exposition in iMIS deletes the Exhb_Booth records associated with the exposition.

- When you close an EXPOCAD exposition, a message displays stating that if you close this Exposition it will delete Order records and not close the matching Event in ExpoCad,

and asking if you wish to proceed.

- If you click Yes, another message displays stating that closing the current meeting will remove all meeting details and create history, and asking if you're sure you wish to purge that meeting.
- Click Yes or No.
- An EXPOCAD exposition cannot be closed if the End Date is greater than today's date. If that happens, a message stating that rule displays.

Expositions

Exposition Overview

Exposition Management helps you manage your day-to-day exposition activities by tracking all phases of the exposition process from initial floor plan requirements to the close of the exposition.

Exposition Management enables you to perform the following tasks effectively and efficiently:

- Enter, edit, and process exposition orders
- Find and track orders
- Manage exhibitor, exhibitor contact, company conflict, and service contractor information
- Assign and manage booths, booth preferences, and booth proximity
- Generate specific inquiries and reports
- Manage exposition-related forms, such as contracts and insurance documents
- Add new prospects and activity records
- Create and use sales scripts
- Define, clone, close, and cancel expositions
- Define exposition products
- View exposition rosters
- Define and configure the setup options used for customizing Exposition Management

iMIS Exposition Management System Capabilities

The following is an overview of the features of the Exposition Management module:

Exposition Definition and Planning

This setup area enables you to define specific exposition details, such as the following:

- Various booth products (sizes and types)
- Pricing schedules
- Other services, such as utilities, furniture, and carpet

Detailed Prospect List Maintenance

This component enables you to create prospect lists both from historical exhibitor files and specified additions of your own. Use this component to do the following:

- Scan through the special prospect working list as often as you want, inquiring about adding or updating records as you develop your marketing database
- Write notes to yourself with tickler follow-up dates
- Create mass mailings and generate mailing labels from the entire prospect list or any defined subset

Detailed Information Tracking

This feature enables you to track and review the short-term and long-term history of exhibitor booth and participation activity, including exhibits currently booked and past exhibits. In addition, all of the standard iMIS database features, including notes and custom demographics, and other tracking fields are available to the Exhibitor's Profile function. For example, Notes fields can store exhibitor products and service information.

Exposition Order Processing

The feature includes all aspects of signing up exhibitors, such as the following:

- Booking specific booths and booth materials for each exhibitor
- Registering booth personnel for tracking reports and producing badges
- Recording deposits and other ongoing payments as they are made
- Placing booths on hold for a specified period of time while waiting for contracts and deposits

Note: To authorize credit card payments for Events, Exhibition, Exposition, and Orders, enter them through Service Central > Enter and edit payments (if licensed for SERVCEN) or AR/Cash > Cash receipts (if licensed for CCAUTH).

Exposition Reporting

This feature includes many letters and reports, including the following:

- Status inquiries by exhibitor or by booth
- Inquiries and reports on booths sold and booths available
- Inquiries and reports on exhibitor orders, including booth numbers, fees, and payments made or due
- Badges
- Confirmations
- Invoices

iMIS Exposition Terminology

The following terms are used frequently in the Exposition Management module:

Badges

Name tags given to each attendee/exhibitor to wear at an exposition. Badges are usually formatted with the individual's nickname or first name, enlarged for readability, and include various identifying information: full name, title, company, city, state. Badges can be marked with a color-coded strip to differentiate groups of attendees, such as members, nonmembers, and exhibitors.

Booth Inventory

Total number of items that have been generated for a particular booth product. For example, the total number of 10' x 10's would be the booth inventory for that product.

Booth Preference Management

Strategy for selling booths where preferences are assigned to exhibitors based on priority points or a ranking system other than the first-come, first-served method. This is typically used by organizations that use the lottery method of assigning booths. With booth preferences, exhibitors can select their first, second, and third choices for booths and are assigned preferences based upon specific criteria, such as how long they have been exhibiting and the amount of space they purchase.

Classes (Exposition)

Categories or types of exhibitors (for example, member, non-member, and staff).

Company Conflicts

Strategy that lets you identify companies that are in conflict with other companies. For example, the companies may be exhibiting the same or similar products and do not want their booths in proximity. By defining proximity areas, you can ensure that these conflicting companies do not exhibit their products or services close to one another.

Exhibitor Products

Product(s) or service(s) that exhibitors show, demonstrate, and/or sell.

Exhibitor

Individual representing a company who exhibits the company's products or services at an exposition.

Exposition

Large event featuring many companies exhibiting products and services usually associated with one another by the industry they serve or by a similarity of the products and services they exhibit.

Exposition Products

Products that are sold by the exposition organizers to the exposition participants, usually called exhibitors. Exposition products are most commonly booths but also include passes and other products, such as sponsorships and advertisements.

Fees

Amounts charged to exhibitors for the various exposition products. Fees can be set by exposition classes/types and by when a product is purchased.

Linked Product

Associates a “primary” or parent product with a “child” or secondary product. When exhibitors order a primary (parent) product, iMIS automatically adds the linked “child” product to the order.

Mapping

Translates one value into another. For example, iMIS might translate (map) a virtual address into a physical address.

Order (Exposition)

Commitment by the exhibitor to participate in an exposition by purchasing booth space and possibly some other exposition products.

Product Conflicts

Strategy for ensuring that companies exhibiting similar products do not exhibit in the same area. Product conflicts are managed by defining proximity areas and only assigning booths to companies exhibiting certain products in those areas.

Prospect

Contact who is likely to participate in an upcoming exposition.

Proximity

You can identify and define proximity areas as a strategy for managing company and product conflicts. Proximity is defined by location relative to certain areas of the floor, such as the Food Court, or relative to location, such as the Southeast Quadrant. You also can use proximity to group similar vendors together on the floor, such as in the Technology Center or the Education area.

Reservations

Companies can reserve exposition products without making a payment or placing an order. Exposition products are reserved in the Reservation window where you can assign booth numbers and proximity area. Not all organizations allow companies to reserve exposition products.

Standard Report

Pre-set iMIS report formats including rosters, labels, and statistical reports. Most standard reports allow you to select which records you want, and most let you override the sort order. However, you may be limited to the amount of control you have over the format or layout of the report.

Upsell

Associates a product with another product as an upsell potential. For example, an exposition may offer other products, such as show directory ads, market research rooms, and sponsorship opportunities. Via such relating, salespeople can view the upsell options available when marketing a specific product.

Wait Listing

Strategy that allows an exhibitor to be placed on a waiting list to purchase an unavailable booth or other exposition product. Exhibitors placed on a wait list have the opportunity to buy the exposition product when it does become available due to an order cancellation or expansion of the floor plan.

Navigation for Exposition

The Exposition task list consists of the items that launch your Exposition Management windows.

Set up an exposition

Opens the Set up an exposition window to define, edit, and clone expositions.

Manage prospect lists

Opens the Manage prospect lists window to manage prospect lists and assign prospects to salespeople.

Process booth orders

Opens the Process booth orders window to record the sale of exposition products, including booths. You can edit, transfer, cancel, and reinstate exposition orders.

View exhibitor information

Opens the View exhibitor information window to search for an exposition and display a list of exhibitors. If you double-click on an exhibitor, the Exhibitor Information window opens, which enables you to view, enter, and edit exhibitor contacts, exhibited products, conflicts with other exhibitors, booth changes, and much more.

Manage wait lists

Opens the Manage wait lists window to record and maintain detailed records of wait-listed exhibitors.

Manage booth preferences

Opens the Manage booth preferences window, which lists all of the booth preferences requested by exhibiting companies for an exposition. You can accept, decline, convert, or delete booth preferences on this window.

Process EXPOCAD

(EXPOCAD only) Select to view the Process EXPOCAD sub-task list. You must be licensed for EXPOCAD for this item to display. See Using iMIS EXPOCAD Interface for additional information about the EXPOCAD module.

Set up EXPOCAD ODBC - Opens the Set up EXPOCAD ODBC window.

Import EXPOCAD - Opens the Import EXPOCAD window.

Generate reports

Opens the Generate reports window where you can select from a variety of standard reports including badges, confirmation letters, invoices, labels, products, rosters, status report, and transaction lists.

Set up tables

Select to display a sub-task list of the following set-up table options:

- Product master list - Opens the Set up product master list window.
- Forms master list - Opens the Set up forms master list window.
- Prospect list - Opens the Set up prospect list window.
- Sales scripts - Opens the Set up sales scripts window.
- Exhibitor classes - Opens the Set up exhibitor classes window.

Set up module

Opens the Exposition Set up module window to set up and customize your Exposition Management module.

Exposition Orders

Overview of exposition order processing

Processing an exposition order involves entering exhibitor information, selecting products to purchase, setting up payment schedules, making payments, and generating badges. Use the Process booth orders window to process orders.

Process booth orders window

From Exposition, select Process booth orders

Exposition

Enter the exposition's code name. Select the Find icon to look up valid exposition codes.

Exposition Information

Displays the exposition's name, dates, and location.

Expo Status

Displays the status of the exposition (A = active, P = Pending, or X = canceled).

Exhibitor

Enter the exhibitor's identification number. Select the Find icon to look up valid exhibitor identification numbers.

Exhibitor Information

Displays the exhibitor's full name, company, title, and address.

Order

Displays the order number.

Date

(Defaults to the current system date) The Date field can be overridden at order entry if you are not using batch control. If you are using batch control, the date defaults to the batch date.

Class

Enter the customer type. The field defaults to M = member or NM = nonmember. This can be overwritten to an exhibitor class as specified on the Set up exhibitor classes window.

Status

The status of the order if a cancellation or transfer has occurred displays in this field. (C = canceled or CT = canceled or transferred). If there has been no cancellation or transfer, the field is blank.

Bill To

Enter the customer identification number of the individual responsible for paying the fees associated with the order. The customer name and company also display.

Purchase Order

Enter a purchase order number or other reference number.

Charged

Displays the total amount charged for the current order.

Paid

Displays the amount paid to date toward the balance of the order.

Balance

Displays the total amount due for the current order.

Product

Select a product from the list of available exposition products.

Qty

Enter the number of products ordered.

Price

The cost of the selected exposition product displays in this field, which is editable. Product pricing is defined in the Exposition Booth & Product Fees window and may vary according to the date of the order and exhibitor class.

Total

Displays the total amount for the current order.

Total Sq Unit

Displays the total square units of booth products purchased by the exhibitor.

Sales Person

Select a salesperson from the drop-down list of available salespeople.

Payment button

Opens the Payments window for entering order payments.

Booth Inventory button

Opens the Booth Inventory Assignment window, which displays all available, sold, and reserved booths for the selected exposition.

Letter button

Opens the Letter Text window.

View Roster button

Opens the Expo Roster window to view all exposition exhibitors.

Options button

Click to display a drop-down list of additional functions:

- Address - Opens the Expo Registration - Name/Address window where you can add or edit exhibitor information.
- Payment Schedule - Opens the Payment Schedule window where you set up or adjust an existing payment schedule.
- Badges - Opens the Badges window where you insert, edit, or delete exhibitor badge information.
- Line Note - Opens the Expo Order Line Note window where you can enter a note about the product and/or the exhibitor.
- Ledger - Opens the Transaction Ledger window and display all accounting activity for the exhibitor.
- Other - Opens the Expo Registration - Other window used for entering additional registration information.

More button

Click to display a drop-down list of additional functions:

- Exhibited Products - Opens the Exhibitor Company Product Maintenance window used for designating exhibited products.
- Company Conflicts - Opens the Company Conflicts window used for determining the Conflicting Companies and Companies Not Conflicting.
- Booth Waitlist - Opens the Wait List Processing window used for processing exhibitors on wait lists.

Entering Exposition Orders

Exposition orders range from primary booth products to advertising inserts that display on the exposition program. Booth and other product sales are the primary activities associated with managing an exposition.

To enter an exposition order

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Click New.
3. Enter an Exposition product code (select the Find icon to look up an exposition).
4. Enter an Exhibitor ID (select the Find icon to look up an ID). The exhibitor's name and address information displays. If the exhibitor is not in the member database, press Tab in the Exhibitor Id field to open the Name/Address Info window and add a record.
5. (optional) Override the Date if necessary. The date defaults to the batch date if batch control is used; otherwise, the date defaults to the system date.
6. (optional) Override the Class code if necessary.
7. (optional) Enter a Bill To ID if it is other than the Exhibitor ID (select the Find icon to look up an ID), and override the Bill To Address information if necessary.
8. Enter a Purchase Order number.
9. Double-click exposition products to add them to the order:

- Enter the order Qty.
- (optional) Override the product Price if necessary.

10. Select a Sales Person.
11. Click Save.

Editing Exposition Orders

Managing expositions includes editing orders. For example, an exhibiting company may decide to change its order from a standard 10' x 10' booth to a 20' x 20' booth, add other

products, or move a booth to a different location.

The iMIS automatic re-pricing feature is unique. When an order's registrant class or registration date is changed, the price for that particular registration changes respectively. For example, if early and regular cutoff dates are defined for the exposition, and the product being ordered has early, regular, and late fees defined, when the registration order date is updated, iMIS automatically re-prices the product based on the date and established fees.

To edit an exposition order

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Find the order (see Finding Exposition Orders).
3. Click Edit.
4. Make any necessary changes.
5. (optional) To add a product to an existing order, do the following:

- Select the product you want to add to the order.
- Enter the Qty.
- (optional) Override the Price if necessary.

6. (optional) To delete a product from an order, double-click the product.
7. Click Save. The Total price updates automatically.

Finding Exposition Orders

In the Exposition Management module, four ways are available for finding an order:

- From a list of all expositions
- Using the Expo Find window
- From a list of all exhibitors
- Using the Roster Search window

To find exposition orders from a list of all expositions

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Click Open or Find.
3. Tab three times. The Expo Find window opens.
4. Select the desired exposition from the list.
5. Click OK.
6. Enter the Exhibitor ID (select the Find icon to look up an ID).

To find exposition orders using the Expo Find window

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Click Open or Find.
3. Tab to display the Expo Find window.
4. Select from the list of Search Types.
5. Enter the search criteria in the Search field at the bottom of the window, and click OK. A list of expositions matching the criteria displays.
6. Select an exposition.
7. Click OK.
8. Enter the Exhibitor ID (select the Find icon to look up an ID).

To find exposition orders from a list of all exhibitors

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Click Find.
3. Enter the Exposition code, and Tab to the Exhibitor field.
4. Tab three times. The Roster Search for (Exposition Name) window opens.

5. Select an exhibitor from the list.
6. Click OK.

To find exposition orders using the Roster Search window

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Click Find.
3. Enter the Exposition code, and Tab to Exhibitor field.
4. Tab twice. The Roster Search for (Exposition code) window opens.
5. Select the Search Type.
6. Enter the search criteria in the All field at the bottom of the window, and click OK. A list of exhibitors matching the search criteria displays.
7. Select an exhibitor from the list, and click OK.

Canceling Exposition Orders

If you must cancel an order for which an exhibitor has already paid, all charges are reversed and the payment becomes an open credit in Accounts Receivable. When this happens, you can apply the money to other products, such as an order or a dues payment, or you may issue a refund through AR.

Within the Exposition Management module, the procedure for canceling an order is the same regardless of whether a payment has been received. If booths are assigned and the order is canceled, the booths become available for assignment to other orders.

When canceling an exhibitor's exposition order, consider the following:

- Are you canceling an order with no cancellation fees? If so, iMIS automatically reverses the charges.
- Are you charging a cancellation fee? If so, you should have defined a cancellation fee product when defining your products. (See Defining Product Fees).

To cancel an exposition order

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Find the order you want to cancel (see Finding Exposition Orders).
3. Click Delete. A message prompts you to verify canceling the order.
4. Click Yes. A “C”, indicating that the order was canceled, displays in the Status field.

To cancel an exposition order with a cancellation fee

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Find the order you want to cancel (see Finding Exposition Orders).
3. Click Delete. A message prompts you to verify canceling the order.
4. Click Yes.
5. Click Edit. A message prompts you to reverse the cancelled order.
6. Click Yes.
7. Select the Cancellation Fee product.
8. Enter a C in the order Status field.
9. Click Save.

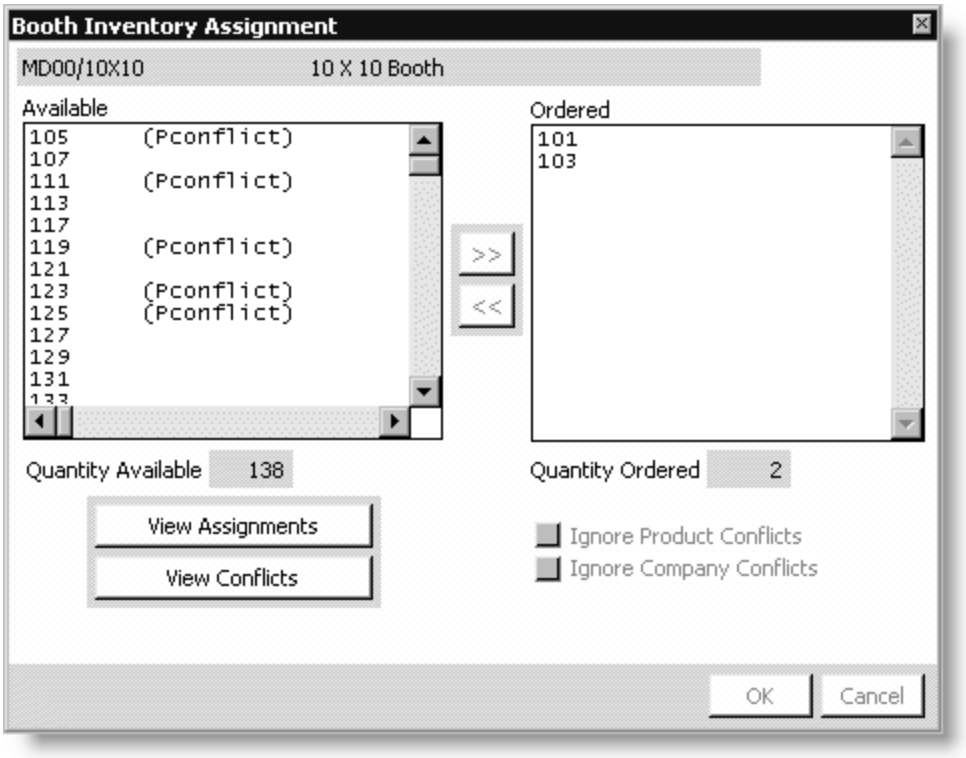
Note: The cancellation fee must be the only product ordered, and the order's Status must be C. If the cancellation fee is not the only charge, iMIS reverses all other charges. The record is preserved until the exposition is closed, which allows you to reactivate it later during order processing. However, the exhibitor does not appear on reports unless you enable the Include Canceled option.

Assigning Booths

After you establish your floor layout and set up booth numbers, you can assign booths when you enter an order. This ensures that you maintain a current inventory of available booths as well as assigned booths or products. To assign a booth to an order, the booth must be defined as a booth product (see Defining Exposition Products).

All booths are assigned through the Booth Inventory Assignment window.

Booth Inventory Assignment window



From Exposition, select Process booth orders, open an order, click Booth Inventory

Available

Lists all available booths for the booth product selected on the Process booth orders window. Reserved products and conflicting products display in this area if you enabled the Product Conflict Checking or Company Conflict Checking options for the exposition on the Expo Options window (from Exposition, select Set up an exposition, double-click an exposition, click More, and select Options).

Ordered

Lists the booths ordered by the exhibitor.

Quantity Available

Displays the total number of Available booths.

Quantity Ordered

Displays the total number of booths ordered by the exhibitor.

View Assignments button

Opens the Current Booth Assignments window, which lists all of the booths, booth numbers, and exhibitors associated with the booths.

View Conflicts button

Opens the Conflicting Booths/Products window. The button is disabled if no conflicts exist.

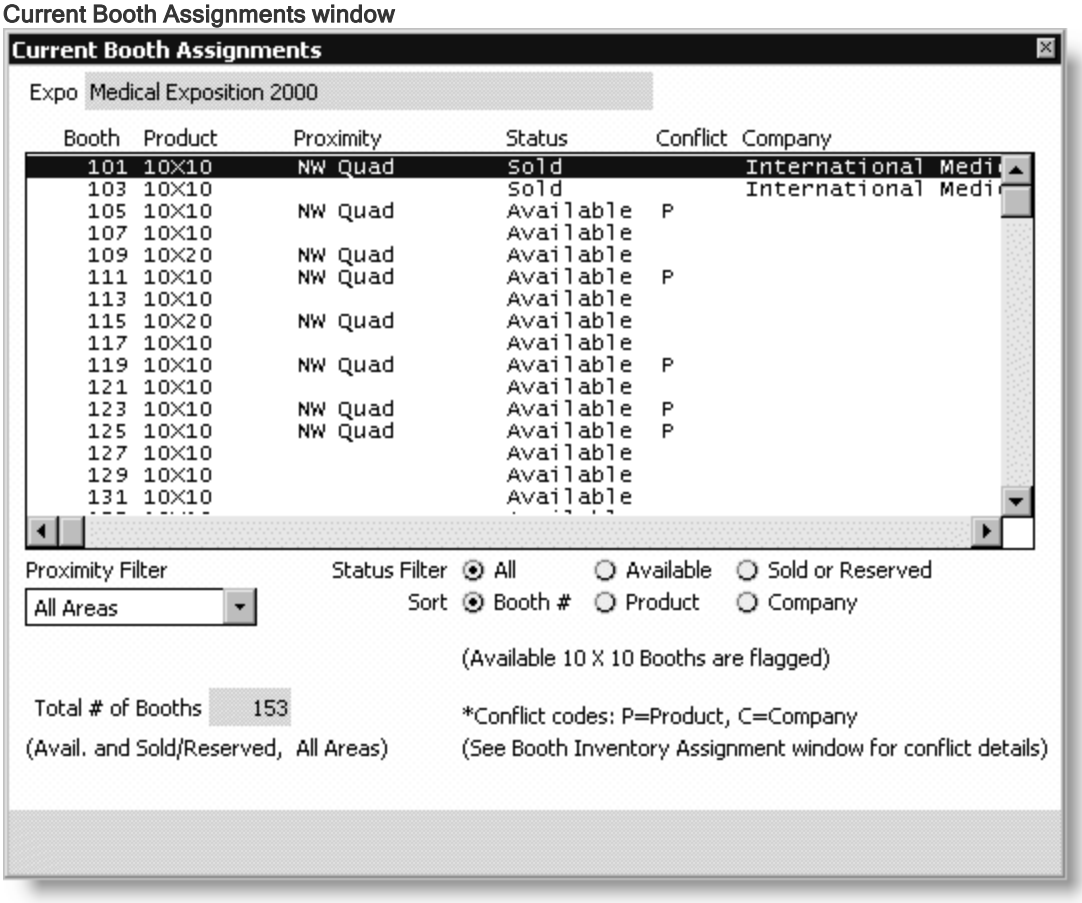
Ignore Product Conflicts

Enable to ignore and not display the order's conflicting products.

Ignore Company Conflict

Enable to ignore and not display the order's company conflicts.

Current Booth Assignments window



From Exposition, select Process booth orders, open an order, click Booth Inventory, and click View Assignments

Expo

Displays the name of the current exposition.

Booth

Displays the system-generated booth number.

Product

Displays the booth product type, such as booth, aisle, and corner.

Proximity

Displays the area on the exposition floor where the booth is located.

Status

Displays the status of the booth product (Available or Sold).

Conflict

Displays conflict information (C = company conflict or a P = product conflict).

Company

Displays the name of the exhibiting company that has purchased the booth product.

Proximity Filter

Select the booth area that you want to display.

Status Filter

Enable an option to display only booths with a status of All, Available, or Sold or Reserved.

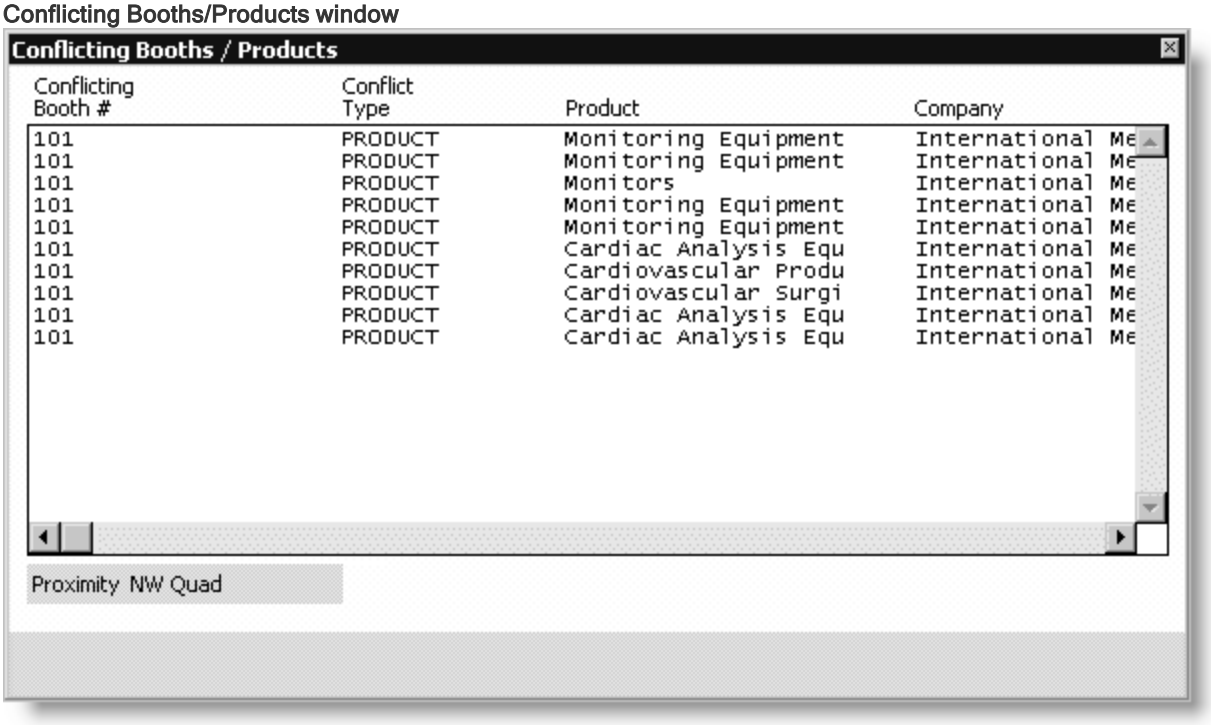
Sort

Enable the sort order for viewing booth assignments.

Total # of Booths

Displays the total number of booths.

Conflicting Booths/Products window



From Exposition, select Process booth orders, open an order, click Booth Inventory, and click View Assignments

Conflicting Booth #

Displays the booth number in conflict with the product selected on the Booth Inventory Assignment window.

Conflict Type

Displays the conflict type (C = company or P = product).

Product

Displays the product in conflict with the booth product selected on the Booth Inventory Assignment window.

Company

Displays the name of the company in conflict with the booth selected on the Booth Inventory Assignment window.

To assign a booth

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Select a Product.
5. Click Booth Inventory to open the Booth Inventory Assignment window.

   Note: If “(Pconflict) = product conflict” is listed beside a booth number, the booth has been assigned to an exhibitor with products that are in conflict. These products may be in conflict with the current exhibitor's products or with another company.
6. Double-click an Available booth (or click >>) to move the booth to the Ordered list. Repeat to assign more booths.
7. Click OK to return to the Process booth orders window.
8. Click Save.

Editing Address Information (Expo)

You can edit a registrant's name, title, company, and address information on the Expo Registration - Name/Address window. Updates on the Expo Registration - Name/Address window are specific to an exposition registration and do not update the information on the Manage customers window. If necessary, make sure to update the Manage customers window with the correct information.

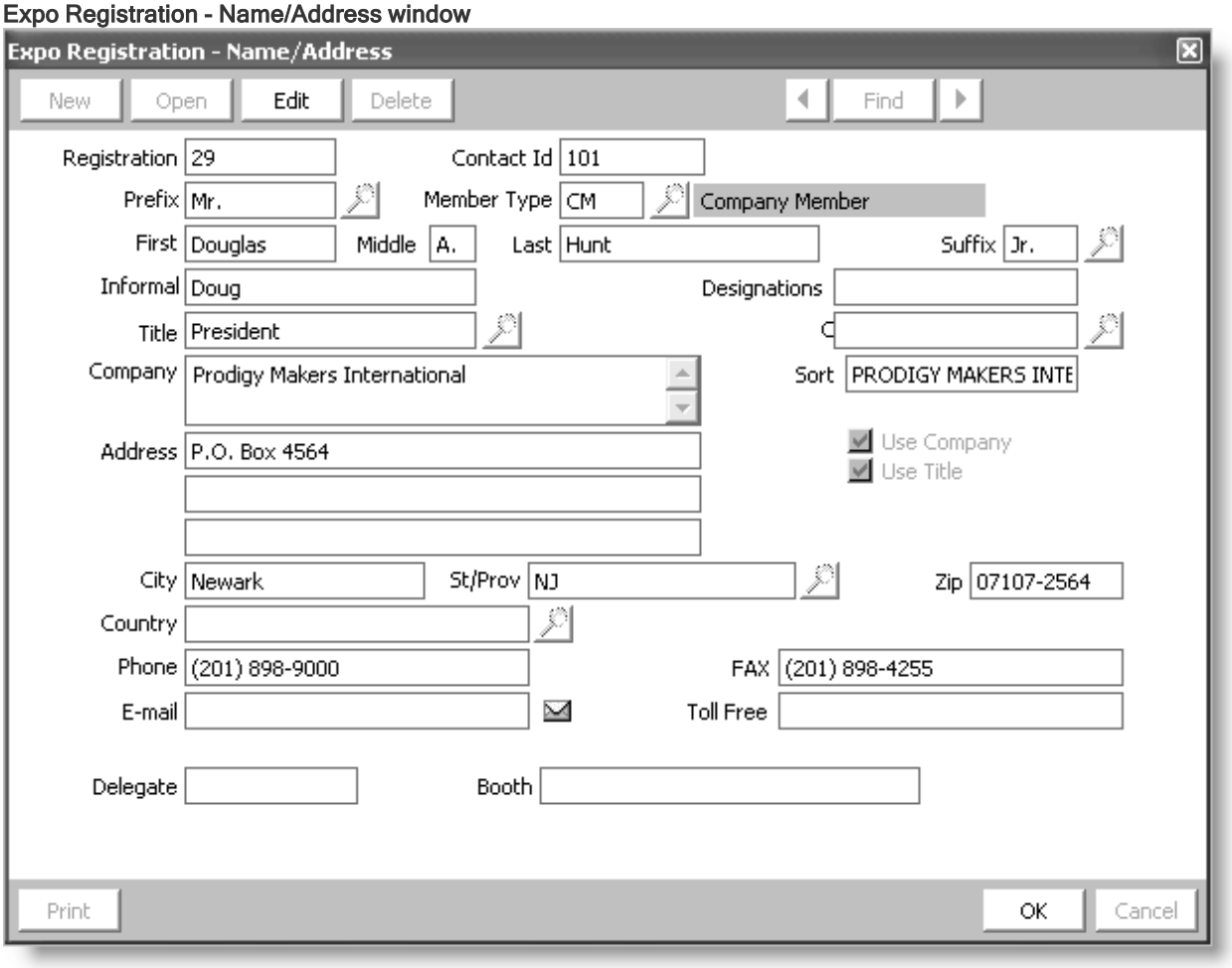
Information Flowdown to Open Expositions

Changes to name, title, company, and preferred mailing address information in Customer Portfolio flow down to open expositions when Update open meetings addresses with address changes is enabled on the Customer Setup - Advanced window.

Updates to name, title, company, and Preferred Mail address information on the Manage customers window will flow down to the Expo Registration - Name Address window if the information on each window is identical prior to the change.

If you designate a different Preferred Mail address on the Manage customers window, this change also will flow to the Expo Registration - Name Address window.

Expo Registration - Name/Address window



From Exposition, select Process booth orders, open an order, click Options, and select Address

Registration

Displays the registration number.

Contact Id

Displays the exhibitor's ID.

Prefix

Enter a prefix, such as Mr., Ms., and Mrs.

Member Type

Select a customer type.

First

Enter a first name.

Middle

Enter a middle name.

Last

Enter a last name.

Suffix

Enter a suffix, such as Jr., Sr., or II.

Informal

Enter an informal name.

Designations

Enter a professional status, such as Ph.D. or MD.

Title

Enter a professional title, such as president or executive director.

Company Id

Enter a company ID.

Company

Enter a company name.

Sort

Enter the name by which you want to sort the company.

Use Company

Select to include the company name with the 'Ship to' address that prints on reports. The Use Company option does not apply to the 'Bill to' address; the 'Bill to' (preferred billing) address's Use Company option is defined on the Customer Setup - Address and Notes window.

You can configure iMIS to set the Use Company option automatically. For details, see Automatic Settings for “Use Company” and “Use Title” Options (see "Name Address window - "Use Company" and "Use Title"").

Note: The label for the Use Company option is customizable, so your system may display another label for this option. The value entered in the Institute Type field on the Customer Setup - Basic Options window defines the option's label.

Use Title

Select to include the registrant's title with the 'Ship to' address that prints on reports. The Use Title option does not apply to the 'Bill to' address; the 'Bill to' (preferred billing) address's Use Title option is defined on the Customer Setup - Address and Notes window.

You can configure iMIS to set the Use Title option automatically. For details, see Automatic Settings for “Use Company” and “Use Title” Options (see "Name Address window - "Use Company" and "Use Title"").

Address

Enter an address.

City

Enter a city.

St/Prov

Enter a state or province code.

Zip

Enter a postal zip code.

Country

Enter a country.

Phone

Enter a phone number.

Fax

Enter a fax number.

E-mail

Enter an e-mail address.

Toll Free

Enter a toll free phone number.

Delegate

Enter the name of a delegate.

Name Address window - "Use Company" and "Use Title"

When entering exposition registrations, iMIS automatically sets the Use Company and Use Title options on the Expo Registration - Name Address window to equal the settings on the Customer Setup - Address and Notes window for the registrant's preferred mailing address (designated on the Manage customers window).

You can override the settings on the Expo Registration - Name Address window as necessary for the registrant's 'Ship to' address (does not affect the 'Bill to' address).

Automatic Updates

The Expo Registration - Name Address window's Use Company and Use Title settings are updated automatically by changing the registrant's designated preferred mail address only if all of the following are true:

1. Update open meetings addresses with address changes is enabled on the Customer Setup - Advanced window.
2. The address on the Expo Registration - Name Address window is identical to the original preferred address prior to the change.
3. The new preferred mail address's settings differ from the original.

Automatic Settings for New Records

For new records added on the Expo Registration - Name Address window during exposition registration, iMIS automatically sets the Use Company and Use Title options on the Expo Registration - Name Address window to equal the Main address field's settings on the Customer Setup - Address and Notes window.

You can override the settings on the Expo Registration - Name Address window as necessary for the new record's Ship To address (does not affect the Bill To address).

To edit a registrant's address (Expo)

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Click Options, and select Address to open the Expo Registration - Name/Address window.
5. Make any necessary changes.
6. Click OK to return to the Process booth orders window.
7. Click Save.

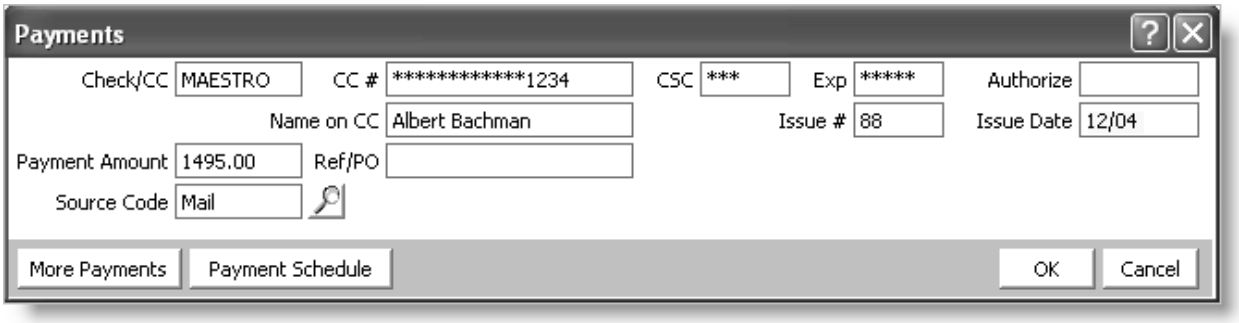
Entering Payments

An exhibitor can pay for an order at the time of order entry or at a later date, depending upon your organization's requirements. Payments can be made with a check, credit/debit card, or by billing the company directly. You may use a combination of payment methods. iMIS allows you to enter single or multiple payments for each order.

The multiple payments feature is used primarily when an order is secured with a partial payment and the balance is paid later.

Note: There is no limit to the number of payments that can be applied to an order. Payment plans and schedules are established by your organization.

Payments window



From Exposition, select Process booth orders, open an order, and click Payment

Check/CC

Enter the check number or credit/debit card code. Credit/debit card codes are defined on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts).

Payment card fields

- CC #

  (Required when a credit/debit card code is entered in the Check/CC field) Specifies a credit/debit card number. When a payment is saved, all but the last four digits of the card number are masked.

- CSC

(Displayed when a European debit card code is entered in the Check/CC field and the associated card authorization account uses the Other gateway and accepts a CSC number for deferred authorization) Specifies the European debit card CSC number. When a payment is saved, the CSC number is masked.

- Exp

  (Required when a credit/debit card code is entered in the Check/CC field) Specifies a credit/debit card expiration date (mm/yy). When a payment is saved, the expiration date is masked.

- Authorize

  (Displayed when a credit/debit card code is entered in the Check/CC field) Specifies an authorization code for the credit/debit card.

- Name on CC

  Enter the name on the credit/debit card.

- Issue #

  (Required/Displays when a debit card code is entered in the Check/CC field and the associated cash account requires an issue number) Enter the debit card issue number.

- Issue Date

  (Required/Displays when a debit card code is entered in the Check/CC field and the associated cash account requires an issue date) Enter the debit card issue date.

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Payment Amount

  Enter the amount of the check or credit/debit card payment.

  Ref/PO

  (optional) Enter the reference or purchase order number.

Source Code

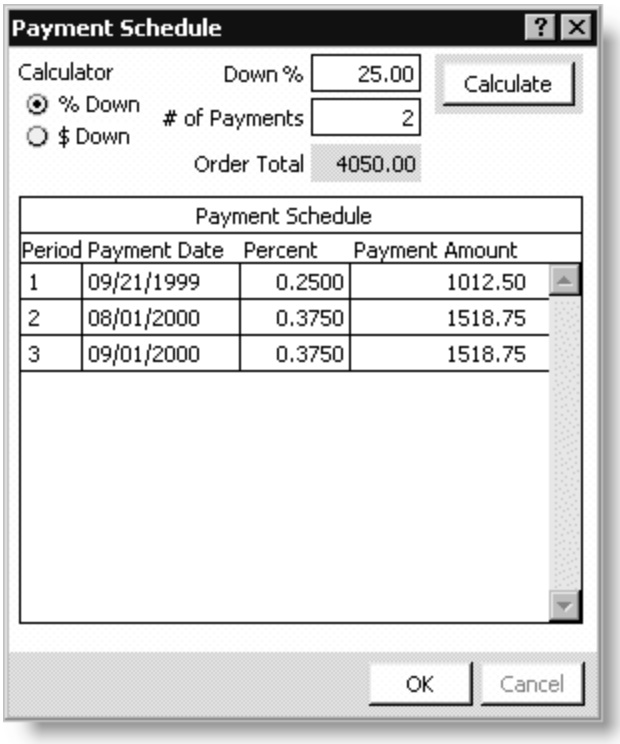
(optional) Enter the source of the payment; for example, mail or telephone. Select the Find icon to look up a source code.

More Payments button

Click to open an additional Payments window for recording additional payments made on the order.

Payment Schedule button

Opens the Payment Schedule window used for scheduling payments and overriding the payment schedule on the Expo General Setup window:



Calculator

% Down - Enable to indicate that the down payment is a percentage of the amount due.

$ Down - Enable to indicate that the down payment is a specific dollar amount.

Down (% or $) - Enter the required down payment (percentage or dollar amount).

# of Payments - Enter the number of payments.

Order Total - Displays the total payment amount.

Calculate button - Click to calculate the payment schedule.

Payment Schedule - Override the payment schedule defined for the exposition on the Expo General Setup window.

To enter a single payment for an order

Follow this procedure when an order is purchased with a single payment. See To enter multiple payments for an order for orders purchased with multiple payments.

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Click Payment to open the Payments window.
5. Enter the payment information:

- Enter either a check number or credit/debit card code (if you enter a credit card code, additional fields display, requiring population).

  Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.
- Enter the Payment Amount.
- (optional) If the exhibitor has sent a purchase order, enter the number or reference key in the Ref/PO field.
- (optional) Enter a Source Code.

6. Click OK to return to the Process booth orders window.
7. Click Save.

To enter multiple payments for an order

Follow this procedure when an order is purchased with multiple payments.

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Click Payments to open the Payments window (first instance), and enter the Payment Amount of the first payment.
5. Click More Payments to open the Payments window (second instance):

- Enter the payment information.
- Click OK to return to the Payments window (first instance).

6. Click OK to return to the Process booth orders window
7. Click Save.

To create or modify a payment schedule

Although you defined the default settings for the exposition payment schedule on the Expo General Setup window, you can override the settings on the Payment Schedule window (defaults to the settings defined on the Expo General Setup window).

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Open the Payment Schedule window:

- Click Payment to open the Payments window.
- Click Payment Schedule.

5. Enable either the % Down or the $ Down option, and enter the required Down payment:

- If you select the % Down option, the down payment is a percentage of the amount due.
- If you select the $ Down option, the down payment is a specified dollar amount.

6. Enter the required # of Payments, and Calculate the amount due on each payment.
7. Click OK to return to the Payments window.
8. Click OK to return to the Process booth orders window.
9. Click Save.

Entering Expo Badge Information

The Badges window is used for entering the registrant, guest, and address data used when printing badges and labels. By default, the Primary badge type does not exist for Exposition Management.

To create the Primary badge type (or additional non-Primary and Secondary badge types), add Primary to the list of badge types on the BADGE_TYPE general look-up/validation table. For details, see Creating General Lookup/Validation Tables for Exposition Management.

Information Flowdown to Expo Badges

Information flowdown to the Badges window is dependent on badge type:

Primary badge

Updates to name, title, company, and address information in Customer Portfolio or on the Expo Registration - Name Address window will flow down to a Primary badge if the information matches prior to the change.

Any name, title, company, or address change on the Manage customers window that updates the Expo Registration - Name Address window also updates Primary badges. A Primary badge can be overwritten, but a subsequent change on the Expo Registration - Name Address window will update the badge.

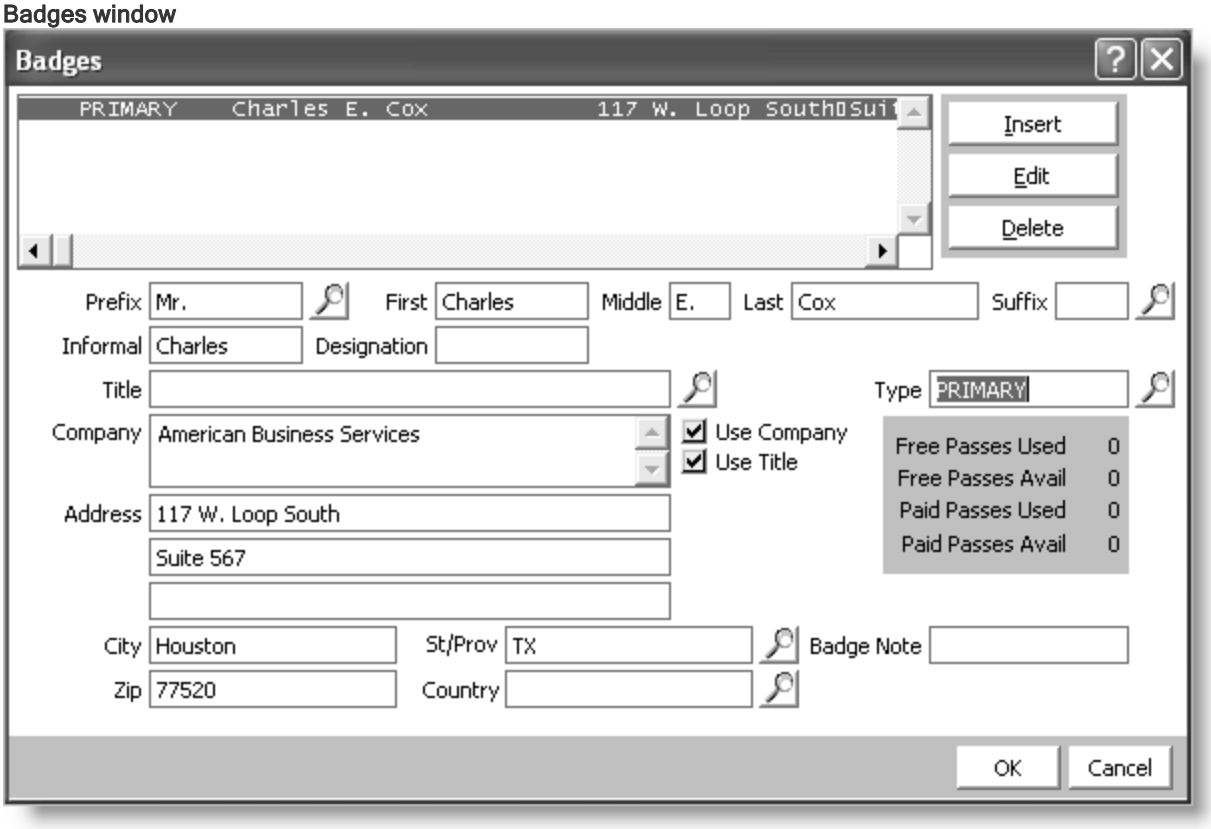
Non-Primary and Secondary badges

Updates to company and address information on the Expo Registration - Name Address window will flow down to non-Primary and Secondary badges if the information matches prior to the change. Name and title changes do not flow down for non-Primary and Secondary badges.

Any company or address information change on the Manage customers window that updates the Expo Registration - Name Address window also will update non-Primary and Secondary badges if the information matches prior to the change.

Note: Changes on the Badges window do not flow up to the Expo Registration - Name Address window or to Customer Portfolio.

Badges window



From Exposition, select Process booth orders, open an order, click Options, and select Badges

Badge Information

The information defined on the Badges window prints on exhibitor badges and reports and is not related to (and does not update) the exhibitor's record or order.

- Prefix - Enter the badge recipient's prefix, such as Mr., Ms., and Mrs.
- First - Enter the badge recipient's first name.
- Middle - Enter the badge recipient's middle name.

- Last - Enter the badge recipient's last name.
- Suffix - Enter a suffix, such as Jr., Sr., or II.
- Informal - Enter the badge recipient's informal name.
- Designation - Enter the badge recipient's professional status, such as Ph.D. or MD.
- Title - Enter the badge recipient's professional title, such as president or executive director.
- Company - Enter the badge recipient's company name.
- Use Company - Select to print the company name on badges and reports. You can configure iMIS to set the Use Company option automatically. For details, see Automatic Settings for “Use Company” and “Use Title” Options (see "Name Address window - "Use Company" and "Use Title"").

  Note: The label for the Use Company option is customizable, so your system may display another label for this option. The value entered in the Institute Type field on the Customer Setup - Basic Options window defines the option's label.
- Use Title - Select to print the registrant's title on badges and reports. You can configure iMIS to set the Use Title option automatically. For details, see Automatic Settings for “Use Company” and “Use Title” Options (see "Name Address window - "Use Company" and "Use Title"").
- Address - Enter the badge recipient's address.
- City - Enter the city in which the badge recipient lives.
- St/Prov - Enter the two-digit abbreviation for the state or province.
- Zip - Enter the postal zip code for the badge recipient.
- Country - Enter the badge recipient's country.

  Badge Status

Displays the amount and type of badges available to the exhibiting company. As badges are processed, the information in this area changes.

- Free Passes Used - Displays the number of free passes used. If the exposition uses free passes, the total number of free passes available to an exhibitor is determined by the options defined on the Expo General Setup window.
- Free Passes Avail - Displays the number of free passes available.
- Paid Passes Used - Displays the number of paid passes used.
- Paid Passes Avail - Displays the number of paid passes available.

Type

Select the type of badge being issued, such as Free_Pass or Paid_Pass.
Badge types are defined on the Set up general lookup/validation window.

Badge Note

(Optional, 10-character limit) Enter specific information about the badge. This information prints in the upper right hand corner of the badge.

Expo Badges window - "Use Company" and "Use Title"

When entering exposition registrations, iMIS automatically sets the Use Company and Use Title options on the Badges window to equal the settings on the Expo Registration - Name Address window.

You can override the settings on the Badges window as necessary for Primary and Secondary badges.

Automatic Updates

Primary badge - The Use Company and Use Title settings are updated automatically by the following:

- Changing the settings on the Expo Registration - Name Address window.
- Changing the registrant's designated preferred mail address (ONLY if all of the following are true):

- Update open meetings addresses with address changes is enabled on the Customer Setup - Advanced window.
- The address on the Expo Registration - Name Address window is identical to the original preferred address prior to the change.
- The new preferred mail address's settings differ from the original.

  Secondary badge - The Use Company and Use Title settings are never updated automatically.

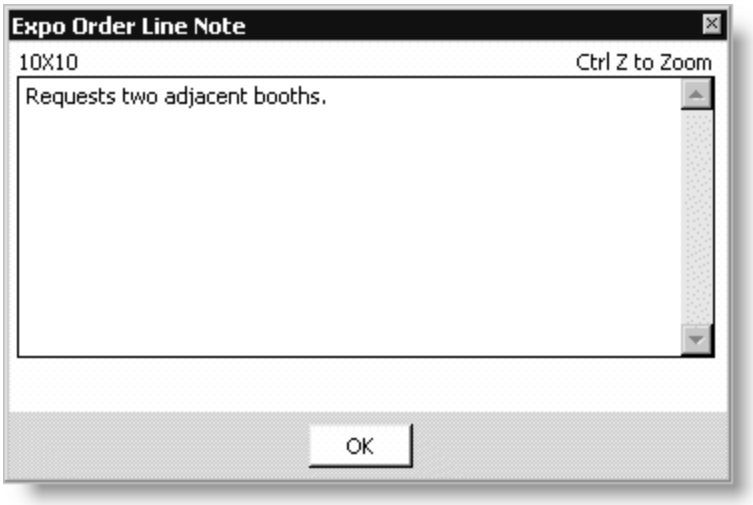
  To enter badge information

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Click Options, and select Badges to open the Badges window.
5. Click Insert.
6. Enter the badge information.
7. Click OK to return to the Process booth orders window.
8. Click Save.

Entering Order Line Notes

Use the Expo Order Line Note window to generate special notes about a product or line item on an exhibitor's order. For example, an exhibitor may have special decorating requirements that need to be communicated to the decorator.

Expo Order Line Note



From Exposition, select Process booth orders, select a line item, click Options, and select Line Note

Product

Displays the name of the product line item.

Note

Enter a note about the order line item.

To enter an order-line note

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Edit.
4. Select an order line.
5. Click Options, and select Line Note to open the Expo Order Line Note window.
6. Enter the order-line note. Press Ctrl+Z to enlarge the data entry area.
7. Click OK.
8. Click Save.

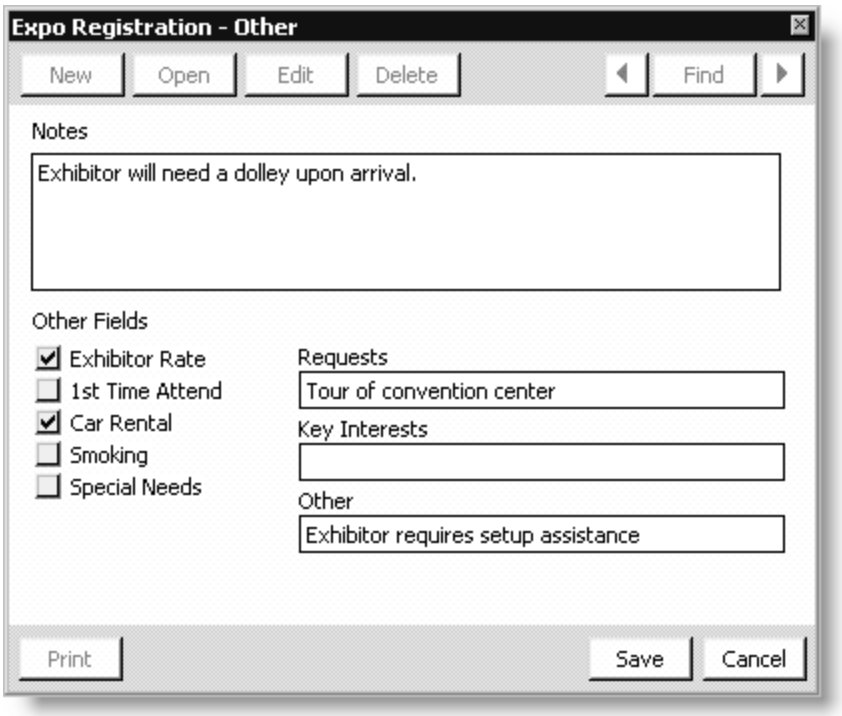
Viewing an Exhibitor's Transaction Ledger

iMIS updates the Transaction Ledger after you apply a payment. You can view the transaction details for an order on the Transaction Ledger window.

Entering Other Registration Information

Use the Expo Registration - Other window to enter additional registration information. The window's Other Fields are defined on the Exposition Set up module window.

Expo Registration - Other window



From Exposition, select Process booth orders, open an order, select a line item, click Options, and select Other

Notes

Enter additional registration information.

Other Fields

(Enabled on the Exposition Set up module window) Enable all applicable fields, and enter all applicable information.

To enter other registration information

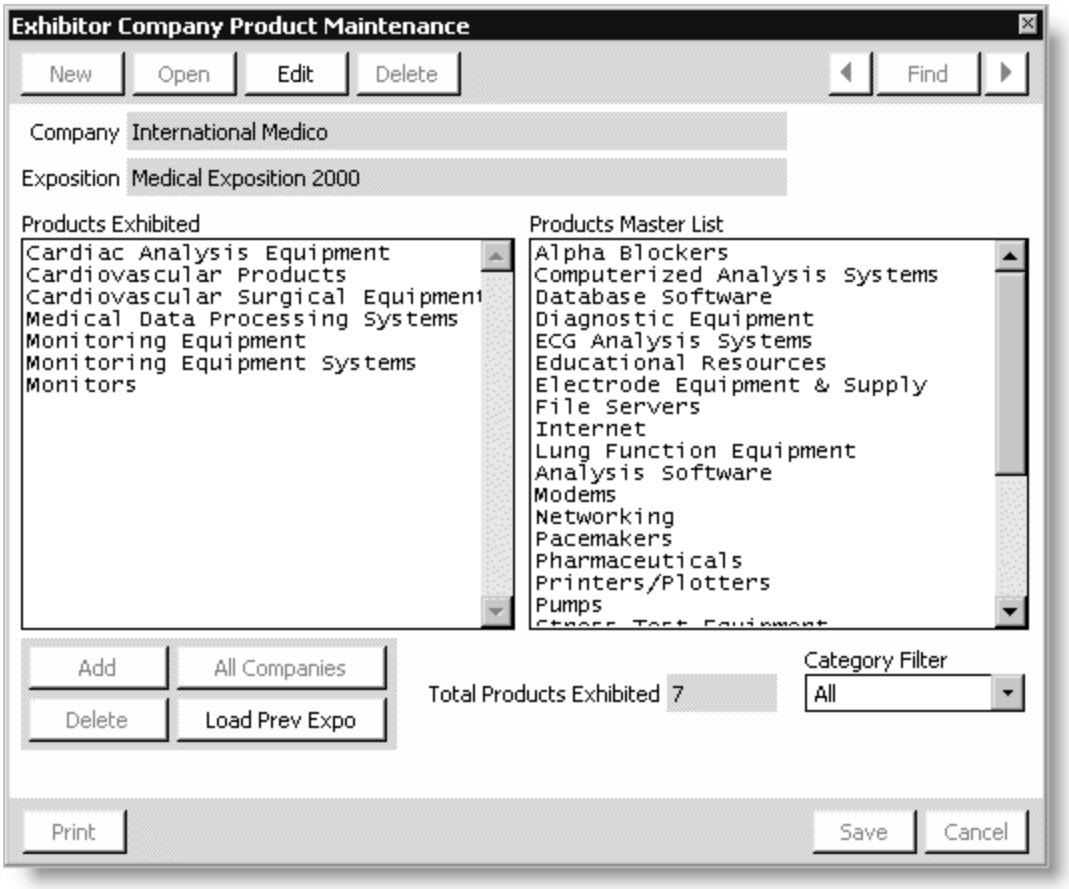
1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders).
3. Click Options, and select Other to open the Expo Registration - Other window.
4. Enter any applicable Notes.
5. Enable all applicable options and enter all applicable information under Other Fields.
6. Click Save to return to the Process booth orders window.
7. Click Save.

Managing an Exhibitor's Product List

You can view, add, or delete products from an exhibitor's product list on the Exhibitor Company Product Maintenance window. You can see which companies are exhibiting the same products (conflicting products) so that you can relocate an exhibitor to eliminate the conflict. You also can load products from previous expositions.

Note: You cannot check for product conflicts until you define products for the exhibiting company.

Exhibitor Company Product Maintenance window



From Exposition, select Process booth orders, open an order, click More, and select Exhibited Products

Company

Displays the name of the exhibiting company (if applicable).

Exposition

Displays the name of the exposition.

Products Exhibited

Lists products being exhibited.

Products Master List

Lists all exposition products.

Add button

Click to move a selected product from the Products Master List to the Products Exhibited list.

Delete button

Click to move a selected product from the Products Exhibited list to the Products Master List.

All Companies button

Opens the All Companies Exhibiting Product window, which displays a list of other companies that are exhibiting the selected product.

Load Prev Expo button

Opens the Load Products from Previous Exposition window where you can load a previous exposition's product list into the exhibiting company's product list.

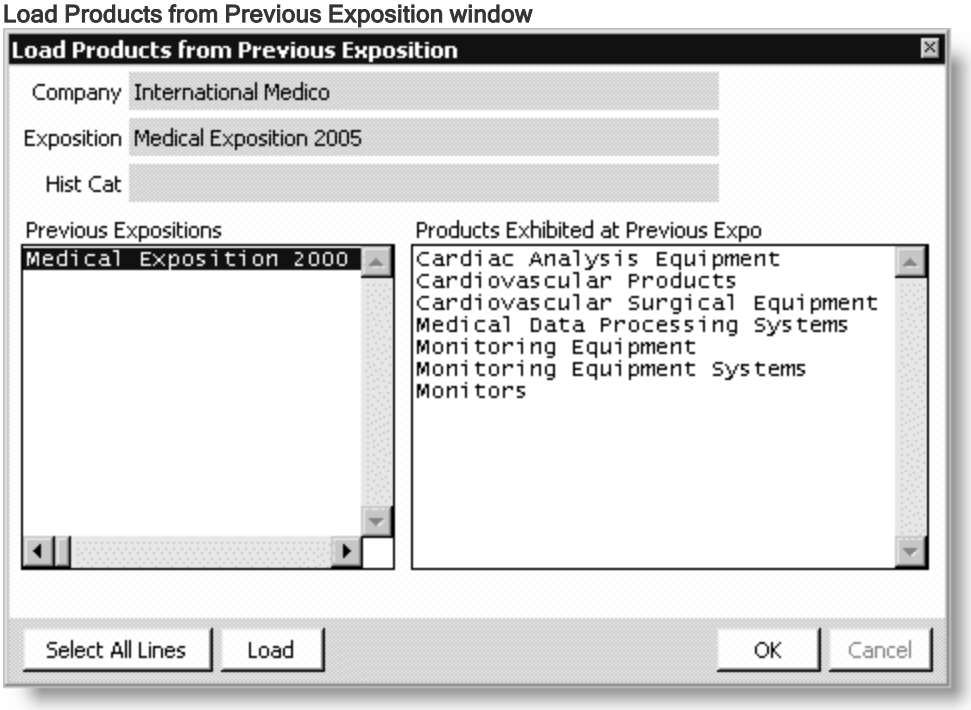
Total Products Exhibited

Displays the total number of products exhibited.

Category Filter

Select the product category you want to view. Product categories are defined on the EXPO_PROD_CAT general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

Load Products from Previous Exposition window



From Exposition, select Process booth orders, open an order, click More, select Exhibited Products, and click Load Prev Expo

Company

Displays the name of the exhibiting company (if applicable).

Exposition

Displays the name of the exposition.

Hist Cat

Displays the historical category.

Previous Expositions

Lists previous expositions.

Products Exhibited at Previous Expo

Lists previously exhibited products.

Select All Lines button

Click to select each line item under the Products Exhibited at Previous Expo list.

Load button

Click to load the selected products.

To add a product to an exhibitor's product list

1. Open the Exhibitor Company Product Maintenance window:

- From Exposition, select Process booth orders to open the Process booth orders window.
- Open an order (see Finding Exposition Orders).
- Click More, and select Exhibited Products.

2. Click Edit.
3. Select a product from the Products Master List, and click Add (press Ctrl to select multiple products).
4. Click Save.

To delete a product from an exhibitor's product list

1. Open the Exhibitor Company Product Maintenance window:

- From Exposition, select Process booth orders to open the Process booth orders window.
- Open an order (see Finding Exposition Orders).
- Click More, and select Exhibited Products.

2. Click Edit.
3. Select a product from the Products Exhibited list, and click Delete (press Ctrl to select multiple products).
4. Click Save.

To view other companies exhibiting the same products

1. Open the Exhibitor Company Product Maintenance window:

- From Exposition, select Process booth orders to open the Process booth orders window.
- Open an order (see Finding Exposition Orders).
- Click More, and select Exhibited Products.

2. Select a product from the Products Exhibited list.
3. Click All Companies to open the All Companies Exhibiting Product window. A list of all companies exhibiting the same product displays.
4. Click OK to return to the Exhibitor Company Product Maintenance window.

To load a product list from a previous exposition

Note: The previous exposition that you are loading from must have a list of products exhibited for the selected exhibiting company. Also, the products you are loading cannot be duplicates of the current exposition products list.

1. Open the Exhibitor Company Product Maintenance window:

- From Exposition, select Process booth orders to open the Process booth orders window.
- Open an order (see Finding Exposition Orders).
- Click More, and select Exhibited Products.

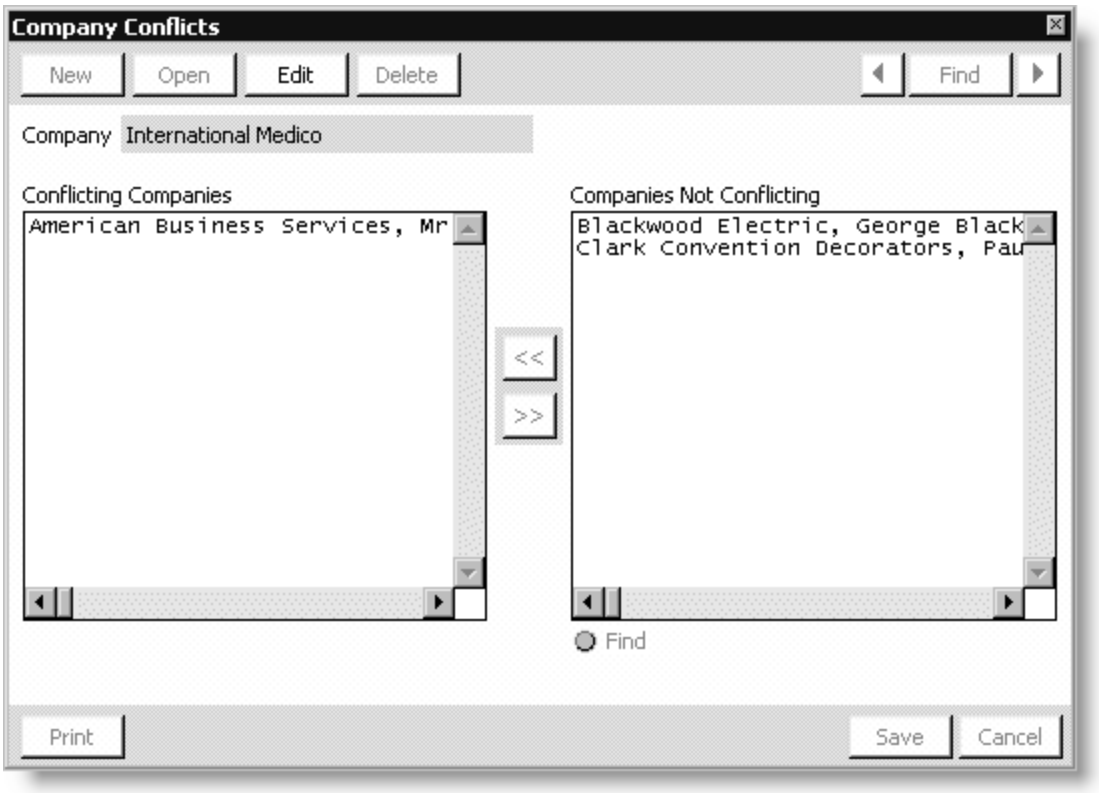
2. Click Load Prev Expo to open the Load Products from Previous Exposition window.
3. Select an exposition from the Previous Expositions list.
4. (optional) Select a product from the Products exhibited at Previous Expo list (click Select All Lines to select all products).
5. Click Load. A message prompts you to verify loading the products.
6. Click Yes.

Managing Company Conflicts

Company conflicts occur when you have companies selling the same products or services at the same exposition. For example, several companies may sell

telecommunications or educational software. Because they sell the same product, these competing companies may not want to exhibit in the same area. Identifying conflicting companies ensures that they are not placed in close proximity to one another.

Company Conflicts window



From Exposition, select Process booth orders, open an order, click More, and select Company Conflicts

Company

Displays the name of the exhibiting company.

Conflicting Companies

Lists companies that conflict with the exhibiting company.

Companies Not Conflicting

Lists companies that do not conflict with the exhibiting company.

Find

Enable to search for companies to add to the Companies Not Conflicting list.

To edit the list of conflicting companies

Before you begin

- Ensure that display fields for rosters of company records have been defined in the Customer Setup-Advanced window (Customers > Setup Module > General, and click Advanced). Specifically, values must be defined in the Roster Display CompanyFields field. Refer to Customizing Roster Display fields in iMIS Customer Management for more information.
- Ensure that all booths to be evaluated for company conflicts have been assigned to defined proximity areas. Refer to Managing Proximity Assignments for more information.
- Ensure that the specific exposition for which you are managing company conflicts is configured to check for company conflicts in the Expo Options window (Exposition > Setup an Exposition, edit the exposition, click More, and choose Options). Specifically, the Company Conflict Checking checkbox must be selected. Refer to Defining Exposition Options for more information.

Procedure

1. Open the Company Conflicts window:
   - From Exposition, select Process booth orders to open the Process booth orders window.
   - Open an order (see Finding Exposition Orders).
   - Click More, and select Company Conflicts.
2. Click Edit.
3. (optional) To add companies to the list of Conflicting Companies, do the following:
   - Enable the Find option to open the Find window.
   - Select a Search Type, and Tab twice to display a list of companies.
   - Select a company, and click OK.

The company is added to the list of Companies Not Conflicting.

- Double-click the company.

  The company is moved to the Conflicting Companies list.

- Repeat this process for each additional company.
- Click Save.

4. (optional) To remove companies from the list of Conflicting Companies, do the following:

- Double-click a company from the Conflicting Companies list.
- Repeat for each additional company.
- Click Save.

  Note: When you reopen the Company Conflicts window, no companies are listed under the Companies Not Conflicting list because the system returned the record(s) to the data files.

Managing Wait Lists for Exhibitors

Wait listing is a strategy to help you manage booth inventory by allowing an exhibitor the opportunity to purchase a currently unavailable booth product if it becomes available later. Booth products become available when an exhibitor cancels a booth or when more booths are added to the floor plan.

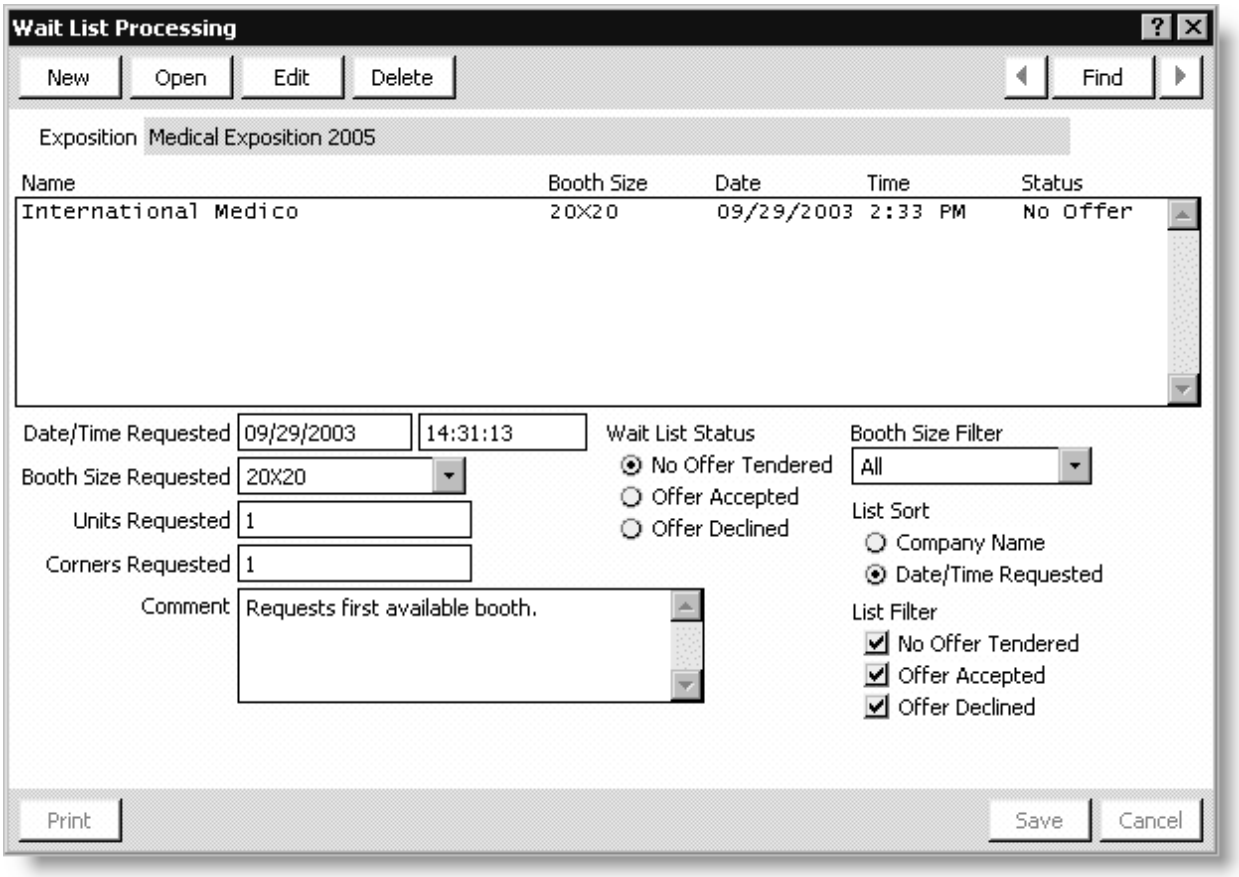
The wait list option is triggered when a product order exceeds the maximum number of units designated for a particular product. An exhibitor can be placed on a wait list even if the maximum number has not been exceeded or if no maximum has been set. iMIS displays a warning message when the maximum number of booths is exceeded. This allows you to add the exhibitor to the wait list on the Wait List Processing window.

You can process an order with a wait-listed booth product in one of three ways:

- Increase the maximum availability for the product
- Add additional booths for the product

- Cancel a wait-listed booth product

Wait List Processing window



From Exposition, select Process booth orders, open an order, click More, and select Booth Waitlist

Exposition

Displays the name of the current exposition.

Name

Displays the name of the exhibiting company on a wait list.

Booth Size

Displays the size of the booth product for which the exhibiting company is wait-listed.

Date

Displays the system date the exhibiting company was placed on the wait list.

Time

Displays the system time the exhibiting company was placed on the wait list.

Status

Displays the wait listing status for the exhibiting company.

Date/Time Requested

Enter the actual date and time that the exhibiting company requested to be on the wait list.

Booth Size Requested

Enter the size of the booth requested by the exhibitor.

Units Requested

Enter the number of booths requested by the exhibiting company (units represent the standard booth dimensions for the exposition).

Corners Requested

Specify whether corners were requested for the booth.

Comments

Enter notes regarding the wait list.

Wait List Status

Enable the current wait list status; for example, has the wait list offer been accepted or declined?

Booth Size Filter

Select a filter to shorten the list of the displayed booth products.

List Sort

Organize the wait list by Company Name or Date/Time Requested.

List Filter

Select from among three options for viewing the list. You can select one, two, or all three of these options:

- No Offer Tendered - Lists companies eligible to be placed on a wait list but that have not received an offer to be placed on the list.
- Offer Accepted - Lists companies that have accepted and have been placed on the wait list.
- Offer Declined - Lists companies that were offered the opportunity to be placed on the wait list but declined the offer.

To add an exhibitor to a wait list

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Enter or open an order (see Finding Exposition Orders).
3. Double-click a booth product, and enter a Qty:

- If the inventory for that booth is filled, and the booth product is not available, a message states that no more booths are available. Click OK.
- If the booth inventory is not yet 0, but the quantity you are ordering is greater than the remaining inventory, a message states only X number of booths are available. Click OK. The order quantity is reset to its original value. Re-enter the order quantity.

Note: If you have sold the maximum number of booths but have not inventoried those booths, the non-inventoried booths still display under the Available list on the Booth Inventory Assignment window. These booths actually are not available because the total number of booths for the selected product has been sold. If you try to add the booths to the current order, the system displays the wait list message.

4. Click Save to add the order.
5. Add the exhibitor to a booth wait list:

- Click More, and select Booth Waitlist to open the Wait List Processing window. A message states that you must enter values for booth size and quantity requirements.
- Click OK. The name of the exhibitor displays on the window, and the Date/Time Requested field is populated automatically.
- Select the Booth Size Requested.
- Enter the number of Units Requested.
- (optional) Enter the number of Corners Requested.
- (optional) Enter a Comment.
- Enable the appropriate Wait List Status.

6. Click Save. When viewing an order, a product that has been placed on a wait list displays with an asterisk (*) next to it.

To view wait lists

1. From Exposition, select Manage wait lists to open the Manage wait lists window.
2. Click Open to display the Exposition Search window.
3. Double-click the exposition you want to view to open it in the Manage wait lists window.
4. Select a Booth Size Filter (Select ALL or a specific booth size).
5. Select a List Sort option.
6. Enable the appropriate List Filter options.

To remove an exhibitor from a wait list

1. From Exposition, select Manage wait lists to open the Manage wait lists window.
2. Find an exhibitor on a wait list:

- Click Open to display the Exposition Search window.
- Double-click an exposition to display all exhibitors on wait lists.

3. Select an exhibitor.
4. Click Delete. A message prompts you to verify removing the exhibitor from the wait list.
5. Click Yes to remove the exhibitor from the wait list.

   Note: If the company decides to order this product at a later time, and the product is not available at the time of ordering, you can place the company on the wait list again.

   To increase booth availability for an exhibitor on a wait list

1. Open a product on the Exposition Product Detail window:

- From Exposition, select Set up an exposition to open the Set up an exposition window.
- Double-click the exposition to open it on the Set up an exposition window (second instance).
- Select a product from the list of Exposition Products.
- Click Edit to open the Exposition Product Detail window.

2. Increase the Max. Available quantity. (If a wait list exists for the product, a message indicates the number of companies on the wait list. Click OK.)
3. Click Save to update the Exposition Product Detail window.
4. Open a wait-listed company's order on the Process booth orders window.
5. Edit the company's order:

- Click Edit.
- Select the booth product that is on the wait list.
- Update the order Qty as availability allows.
- Click Booth Inventory, and assign booth number(s) for the product on the Booth Inventory Assignment window.

  Note: If booth numbers are not assigned, the wait list * will not be removed from the product.

Note: A message displays if you try to update the quantity for more than the amount available. Click OK, and update the order Qty based on the number of booths that are available.

6. Click Save to update the order. If booth numbers were assigned to the booth product, a message prompts you to delete the wait list entry:

- If the order is for the quantity specified on the wait list, click Yes to remove the company from the wait list.
- If the order is for less than the quantity specified on the wait list, click No. Manually update the wait list entry to reflect the number of booths required and the status of the wait list:

7. Open the Manage wait lists window (from Exposition, select Manage wait lists).

- Find the company whose entry you need to edit.
- Click Edit, adjust the Units Requested, and enable the No Offer Tendered under Wait List Status.
- Click Save.

To add additional booths for an exhibitor on a wait list

1. Open a product on the Exposition Product Detail window:

- From Exposition, select Set up an exposition to open the Set up an exposition window.
- Double-click the exposition to open it on the Set up an exposition window (second instance).
- Select a product from the list of Exposition Products.
- Click Edit to open the Exposition Product Detail window.

2. (optional) Add a single booth:

- Click Booth to open the Booths window.
- Click Add Individual.

- Enter a New Booth Number.
- Click Save.

  A message states that the maximum available quantity is being adjusted.
- Click OK.

  A message lists the number of companies on the wait list and prompts you to view the wait list.
- (optional) Click Yes to open the wait list, and note the companies listed.

3. (optional) Add a series of booths:

- Click Booth Generator to open the Booth Generator window.
- Enter the Starting Booth #, # of Booths, and Increment By number.
- Click Save.

  A message states that the maximum available quantity is being adjusted.
- Click OK.

  A message lists the number of companies on the wait list and prompts you to view the wait list.
- (optional) Click Yes to open the wait list, and note the companies listed.

4. Open a wait-listed company's order on the Process booth orders window.
5. Edit the company's order:

- Click Edit, then select the booth product that is on the wait list.
- Update the order Qty as availability allows.
- Click Booth Inventory, then assign booth number(s) for the product on the Booth Inventory Assignment window.

  Note: If booth numbers are not assigned, the wait list * will not be removed from the product.

Note: A message displays if you try to update the quantity for more than the amount available. Click OK, and update the order Qty based on the number of booths that are available.

6. Click Save to update the order. If booth numbers were assigned to the booth product, a message prompts you to delete the wait list entry:

- If the order is for the quantity specified on the wait list, click Yes to remove the company from the wait list.
- If the order is for less than the quantity specified on the wait list, click No. Manually update the wait list entry to reflect the number of booths required and the status of the wait list.

7. Open the Manage wait lists window (from Exposition, select Manage wait lists).

- Find the company whose entry you need to edit.
- Click Edit, adjust the Units Requested, and enable the No Offer Tendered under Wait List Status.
- Click Save.

To cancel an order for a wait-listed booth

1. Cancel the order. See Canceling Exposition Orders.
2. Remove the exhibitor from the wait list. See To remove an exhibitor from a wait list.

To delete a product (that has a wait list) from an order

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open an order (see Finding Exposition Orders), and click Edit.
3. Double-click the booth product for which a wait list exists.
4. (Applicable only if booth numbers are assigned) If a booth number is assigned to the product on the Booth Inventory Assignment window, a message prompts you to unassign booth numbers to reduce the quantity ordered:

- Click Yes to open the Booth Inventory Assignment window.
- Double-click the Ordered booth number to move it under the list of Available booth numbers, and click OK.

5. A message displays that states the number of companies on the wait list and prompts you to open the wait list after completing the order. Click OK to delete the product from the order.
6. Click Save to update the order.

Printing Individual Reports and Reviewing Rosters

The Exposition module contains reports that are specific to planning and administering expositions. You can run several reports from the Process booth orders window.

The Print button opens the Select Report window, which allows you to print an invoice, confirmation, or badge. The Letter button opens the Letter Text window where you can compose a letter for the exhibitor whose record you are editing. Output prints to the report destination you select. To change the report destination to screen, select File> Report Destination> Screen.

To print individual Expo orders

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Enter or open an order (see Finding Exposition Orders).
3. Click Print to open the Select Report window.
4. Select a Report Option.
5. Click Run.

To print a letter

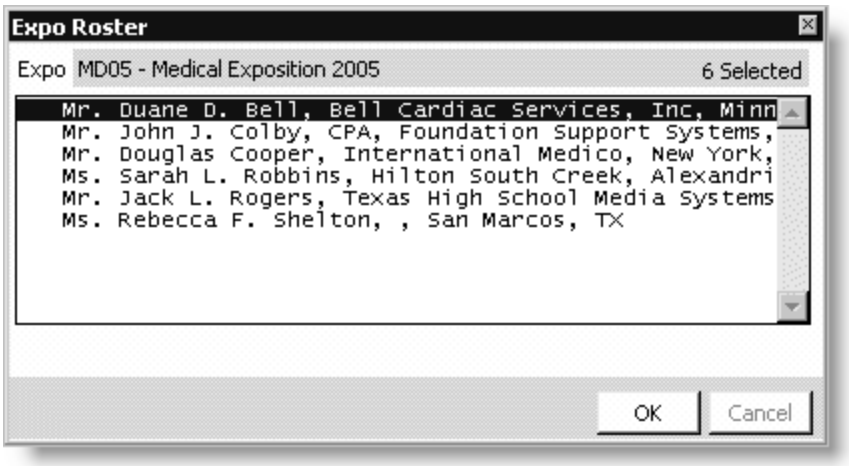
1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Enter or open an order (see Finding Exposition Orders).
3. Click Letter to open the Letter Text window.

4. Enter a letter.
5. Click Print.

Viewing Exposition Rosters

View exposition rosters on the Expo Roster window.

Expo Roster window



From Exposition, select Process booth orders, open an order, and click View Roster

Expo

Displays the name of the exposition.

Exhibitors

Lists exhibitors.

To view an exposition roster

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Enter or open an order (see Finding Exposition Orders).
3. Click View Roster to view all of the exposition's registered exhibitors.

Substituting Exhibitors

Times may exist when an exhibitor cannot exhibit at a particular exposition because of a conflict or other unforeseen occurrence. However, another exhibitor may want to take

over the order purchased by the first exhibitor. This can be accomplished easily in the iMIS Exposition Management module.

To substitute exhibitors

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open the order of the exhibitor whose order you want to substitute (see Finding Exposition Orders).
3. Click Transfer/Substitute. Your cursor is now in the Exposition field.
4. Tab to the Exhibitor field, and enter the substitute Exhibitor ID. Notice that when you press Tab, the Bill To and Product field information disappear. When you enter the substitute exhibitor ID, the Bill To and Product fields are populated with the new information.
5. Click Save.

After performing a substitution, CT appears on the Expo Roster window and the Roster Search window by the name of the original exhibitor, indicating that the exhibitor's order was canceled and transferred.

Also, the Transaction Ledger window lists the details of the transferred booth order, including the name to whom the order was transferred.

Transferring Exhibitors

When an exhibitor cannot attend a particular exposition because of an unforeseen occurrence, you can transfer the exhibitor's order to another exposition.

To transfer an exhibitor to another exposition

1. From Exposition, select Process booth orders to open the Process booth orders window.
2. Open the order of the exhibitor whose order you want to transfer (see Finding Exposition Orders).
3. Click Transfer/Substitute. Your cursor is now in the Exposition field.
4. Overtype the Exposition Code with the Code of the new exposition.
5. Click Save.

Note: Any positive balance from the original booth order is applied as a credit towards the exposition to which the exhibitor was transferred.

After performing a substitution, CT appears on the Expo Roster window and the Roster Search window by the name of the original exhibitor, indicating that the exhibitor's order was canceled and transferred.

Also, the Transaction Ledger window lists the details of the transferred booth order, including the exposition code to which the order was transferred.

Exhibitor Information

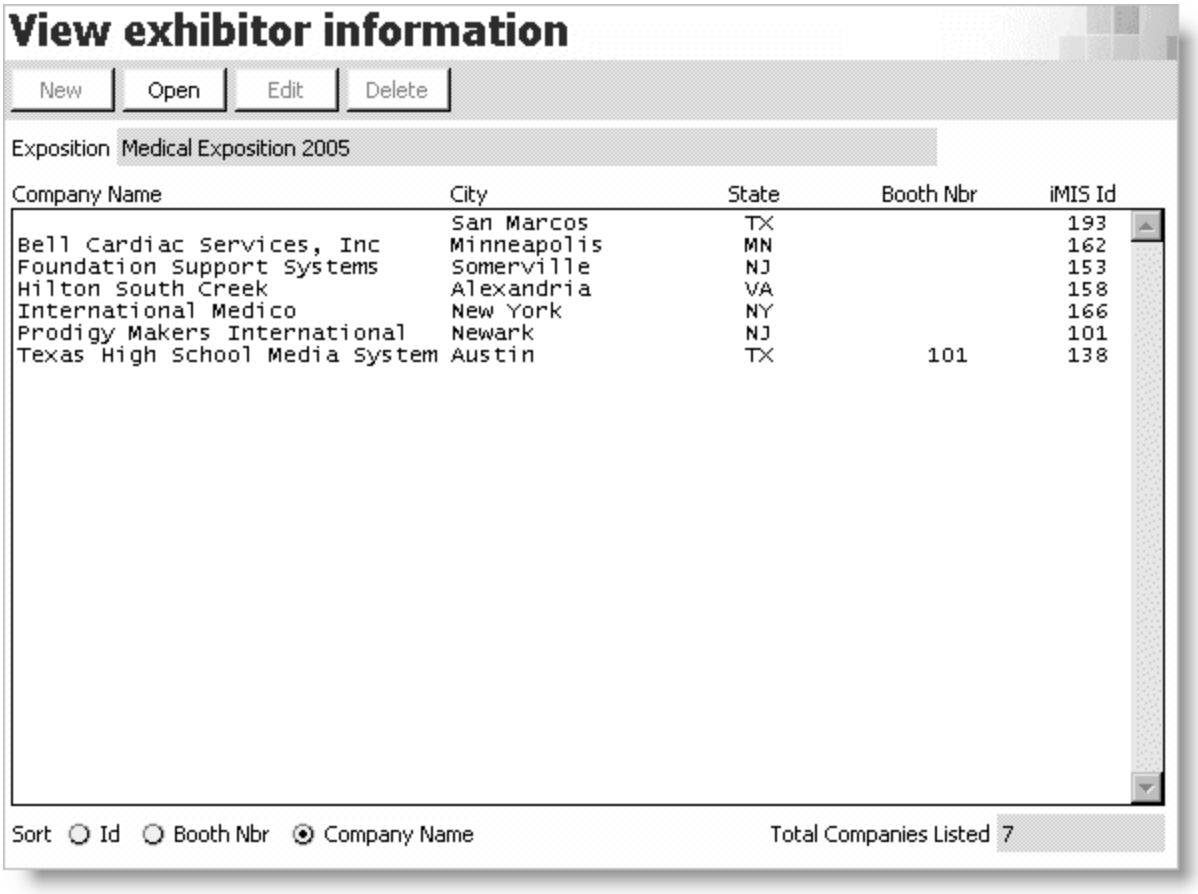
Overview of exhibitor information

Keeping exhibitor information current is critical to effectively managing your exposition. iMIS allows you to view a profile of an exhibiting company through the Exhibitor Information window.

Viewing Exhibitor Information

You can view all companies exhibiting at your exposition on the View exhibitor information window. It is through this window that you access the Exhibitor Information window, which is where you manage and track information about exhibiting companies.

View exhibitor information window



From Exposition, select View exhibitor information

Exposition

Displays the name of the selected exposition.

Company Name

Displays the name of an exhibiting company at the exposition.

City

Displays the city where the exhibiting company is located.

State

Displays the state where the exhibiting company is located.

Booth Number

Displays the booth numbers assigned to the exhibiting company.

iMIS Id

Displays the identification number assigned to the exhibiting company.

Sort Options

Id - Enable to view the list by customer identification number.

Booth Nbr - Enable to view the list by assigned booth number.

Company Name - Enable to view the exhibiting companies alphabetically.

Total Number of Companies Registered

Displays a running total of registered companies exhibiting at the selected exposition.

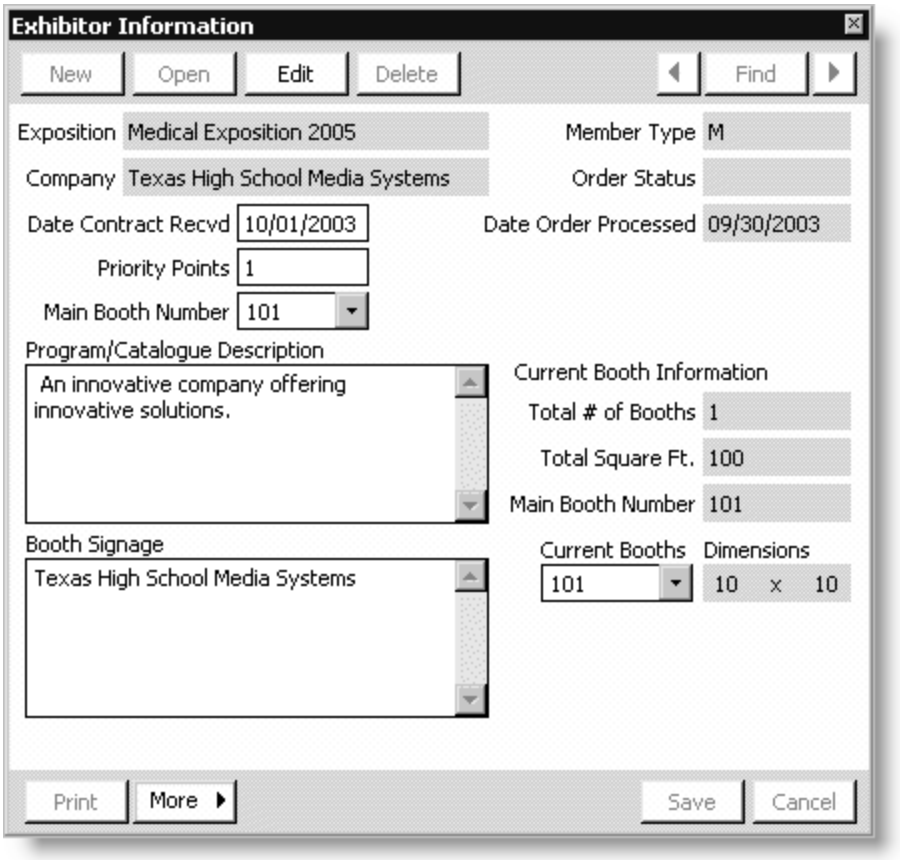
To view exhibitor information

1. From Exposition, select View exhibitor information to open the View exhibitor information window.
2. Click Open to display the Exposition Search window.
3. Double-click an exposition to display a list of all companies exhibiting at the selected exposition.

Entering Exhibitor Information

Use the Exhibitor Information window to enter specific information about exhibiting companies. You can keep the company's list of products up-to-date, as well as manage forms and service contractor information. You also can edit existing orders or set up conflicting companies.

Exhibitor Information window



From Exposition, select View exhibitor information, open an exposition, and double-click an exhibitor

Exposition

Displays the name of the current exposition.

Company

Displays the name of the exhibiting company.

Member Type

Displays the exhibitor's customer type.

Order Status

Displays the status of the order if a cancellation or transfer has occurred (C = canceled or CT = canceled or transferred).

Date Contract Recvd

Enter the date the contract was received. Leave this field blank if a contract has not been received.

Priority Points

Enter the number of Priority Points earned by this particular exhibitor.

Main Booth Number

Select the primary booth number.

Program/Catalogue Description

Enter information to be included on an exposition program.

Booth Signage

Enter information to be included on booth signage (company banner).

Current Booth Information

Total # of Booths - Enter the total number of booths ordered by the exhibitor.

Total Square Ft. - Enter the total number of booth square footage ordered by the exhibitor.

Main Booth Number - Enter the primary booth number (the first one entered) for the exhibitor.

Current Booths - Lists the booth numbers that are part of the order. Select a booth number to display the dimensions of the booth.

Dimensions - Displays the dimensions of the booth selected from the list of Current Booths.

More button

Click to display the following options:

- Contact Maintenance - Opens the Exhibitor Contacts window, which allows you to add or delete contacts and assign the contact type (primary or default).
- Display Contacts List - Opens the Contacts List window listing the company contact information.
- Exhibited Products - Opens the Exhibitor Company Product Maintenance window, which lists the products the company is exhibiting and the product master list. See Managing an Exhibitor's Product List for more.
- Booth Changes - Opens the Booth Change History window, which displays the company's booth history.
- Company Conflicts - Opens the Company Conflicts window, which displays the companies that conflict with the selected company. See Managing Company Conflicts for more.
- Service Contractors - Opens the Current Service Contractors window, which displays a list of approved service contractors.
- Form Tracking - Opens the Forms Status window, which lists the required forms, the date the form must be received, the received date, and the contact person's name.
- AR Ledger - Opens the Accounts Receivable window, which includes a list of the company's accounting transactions.

To enter exhibitor information

1. Open the Exhibitor Information window:
   - From Exposition, select View exhibitor information to open the View exhibitor information window.
   - Click Open to display the Exposition Search window, and double-click an exposition.
   - Double-click an exhibitor.
2. Click Edit.
3. Enter all applicable information.

4. Click Save.

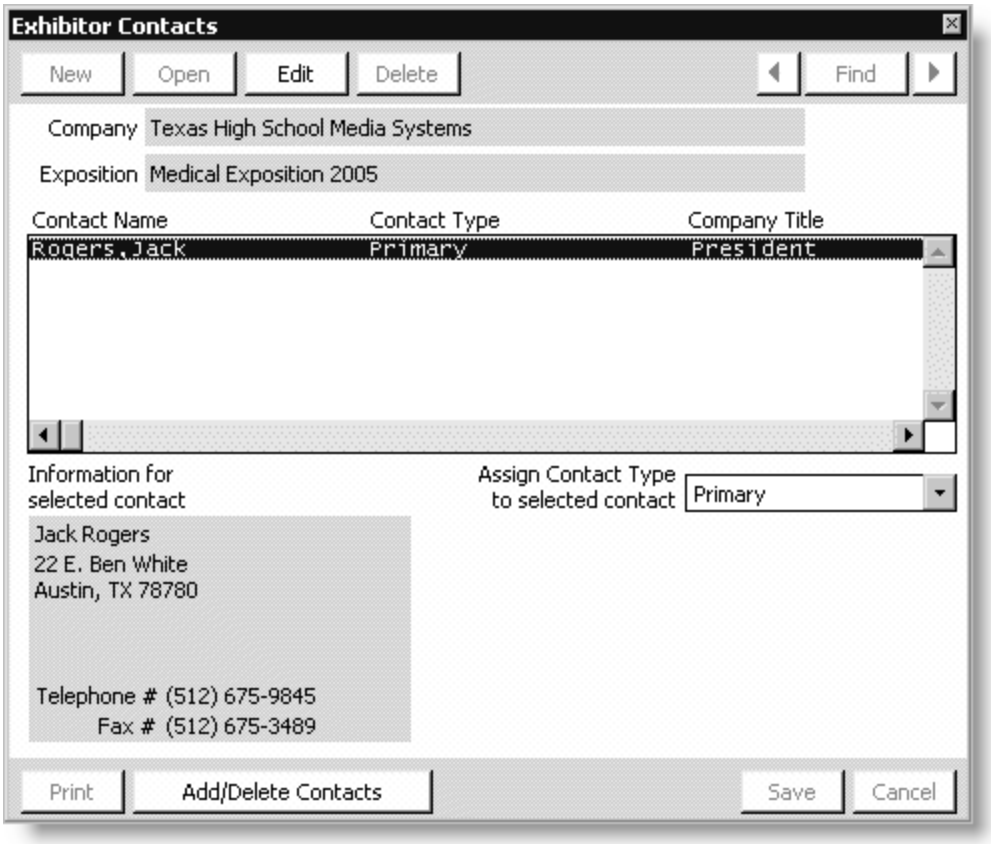
Managing Exhibitor Contacts

An important task in managing your exposition is maintaining an up-to-date contact list for each of the exhibiting companies. From time to time, you may need to add or delete contacts for the exhibiting companies.

For example, your initial contact with the company may have been the sales and marketing person who arranges booth purchases. Once the sale is complete, all future contact may be with the accounts payable clerk.

You manage exhibitor contacts through the Exhibitor Contacts window.

Exhibitor Contacts window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, and select Contact Maintenance

Company

Displays the name of the exhibiting company.

Exposition

Displays the current exposition selected.

Contact Name

Displays the name of the contact for the exhibiting company.

Contact Type

Displays the type of contact, for example, primary, accounting, or sales.

Company Title

Displays the contact's title within the exhibiting company.

Information for Selected Contact

Displays the contact's name and address information.

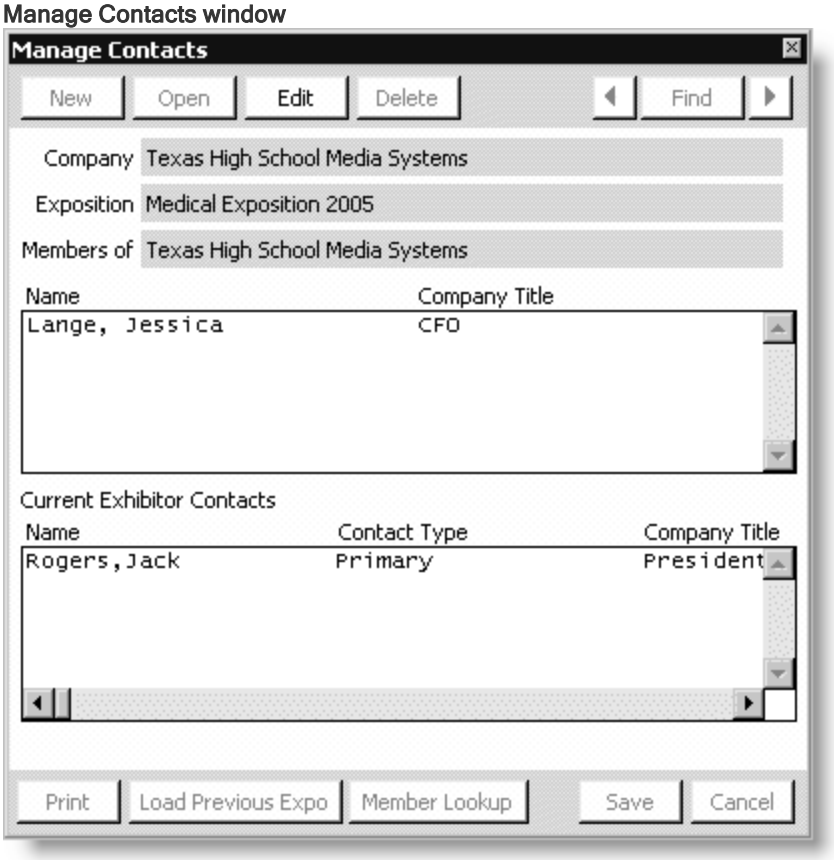
Assign Contact Type to selected contact

Select a contact type from the list (Primary is the default type). Define other contact types on the Set up general lookup/validation window.

Add/Delete Contacts button

Opens the Manage Contacts window where you add or delete contacts for the selected exhibitor.

Manage Contacts window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, select Contact Maintenance, and click Add/Delete Contacts

Available Contacts

Name - Displays the name of an available contact for the exhibiting company.

Company Title - Displays the contact's title within the exhibiting company.

Current Exhibitor Contacts

Name - Displays the name of an available contact for the exhibiting company.

Contact Type - Displays the type of contact, such as primary, accounting, or sales.

Company Title - Displays the contact's title within the exhibiting company.

Load Previous Expo button

Opens the Load Contacts from Previous Exposition window.

Member Lookup button

Opens the Find window to search for an exhibitor.

To add an exhibitor contact

1. Open the Exhibitor Contacts window:

- From Exposition, select View exhibitor information to open the View exhibitor information window.
- Click Open to display the Exposition Search window, and double-click an exposition.
- Double-click an exhibitor to open the Exhibitor Information window.
- Click More, and select Contact Maintenance.

2. Click Add/Delete Contacts to open the Manage Contacts window.
3. Click Edit, and add a contact by doing one of the following:

- Double-click an individual in the list of Available Contacts to add them to the list of Current Exhibitor Contacts (linked by CO_ID).
- Click Load Previous Expo to add contacts from a previous exposition.
- Click Member Lookup to find an individual contact.

4. Click Save, and return to the Exhibitor Contacts window.
5. Select an exhibitor contact, and click Edit.
6. Assign a contact type to the selected contact (select a type from Assign Contact Type to selected contact), and click Save.

To delete a contact

1. Open the Exhibitor Contacts window:

- From Exposition, select View exhibitor information to open the View exhibitor information window.
- Click Open to display the Exposition Search window, and double-click an exposition.

- Double-click an exhibitor to open the Exhibitor Information window.
- Click More, and select Contact Maintenance.

2. Click Add/Delete Contacts to open the Manage Contacts window.
3. Click Edit.
4. Double-click a contact in the list of Current Exhibitor Contacts to remove the contact from the list.
5. Click Save.

To view a list of contacts

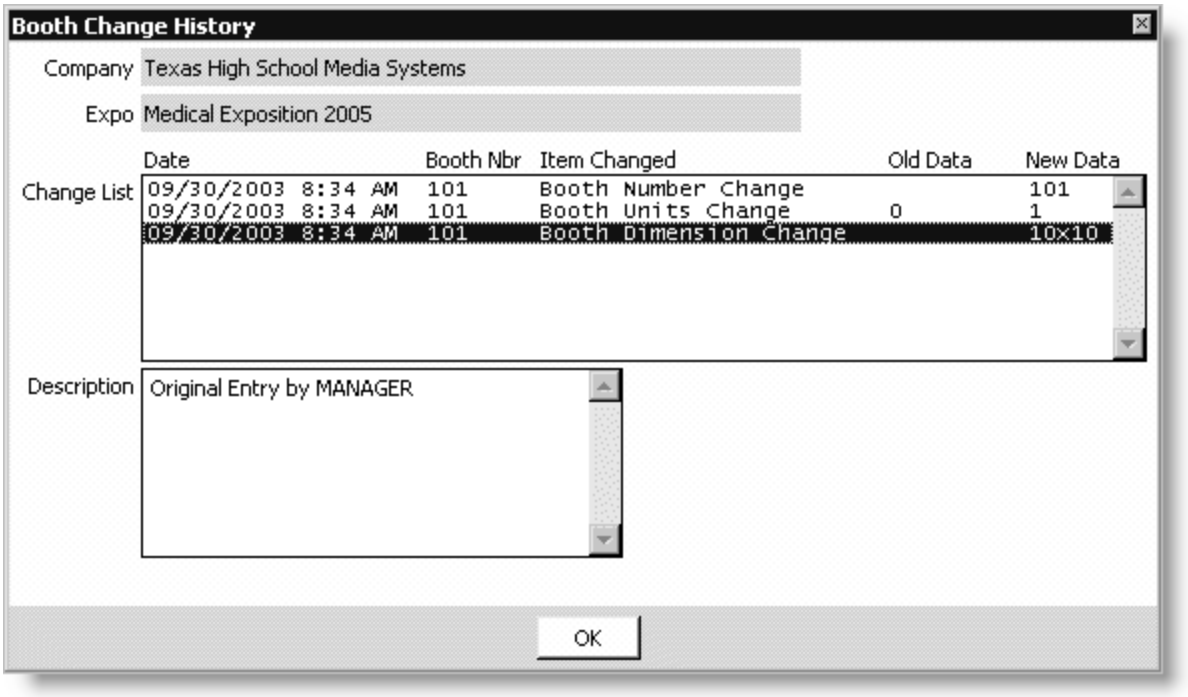
1. From Exposition, select View exhibitor information to open the View exhibitor information window.
2. Click Open to display the Exposition Search window, and double-click an exposition.
3. Double-click an exhibitor to open the Exhibitor Information window.
4. Click More, and select Display Contacts List.

Note: The contacts list can be set to display automatically if you enable the Contacts Pop Up Window option on the Expo Options window.

Viewing Booth Changes

Use the Booth Change History window to view a history of all booth changes related to a particular exhibitor.

Booth Change History window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, and select Booth Changes

Company

Displays the name of the exhibiting company.

Expo

Displays the name of the current exposition.

Change List

Lists all changes for booths.

Description

Lists all additional booth-change information.

To view booth changes

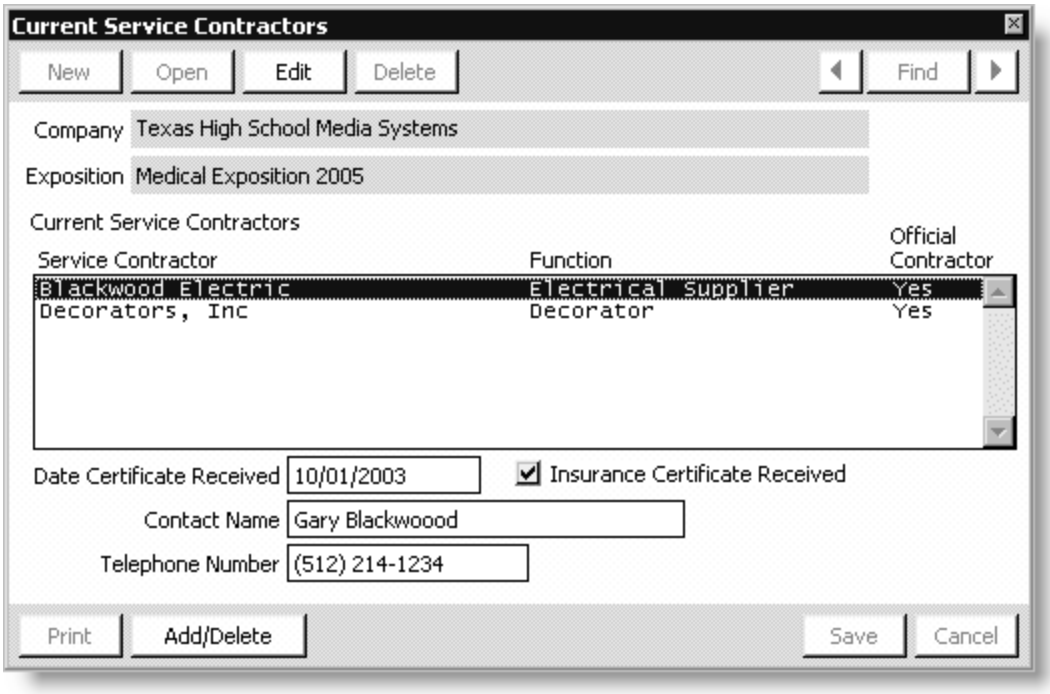
1. From Exposition, select View exhibitor information to open the View exhibitor information window.

2. Click Open to display the Exposition Search window, and double-click an exposition.
3. Double-click an exhibitor to open the Exhibitor Information window.
4. Click More, and select Booth Changes.
5. Select an item from the Change List to see a Description of any booth changes (and who made the changes).

Managing Service Contractors

Use the Service Contractor Find window to add and delete service contractors for an exhibiting company. You also can edit a service contractor's information using the Current Service Contractor window, which you access through the Service Contractor Find window.

Current Service Contractors window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, and select Service Contractors

Company

Displays the name of the exhibiting company.

Exposition

Displays the selected exposition.

Current Service Contractors

Service Contractor - Displays the name of the selected service contractor.

Function - Displays the service contractor's specialty.

Official Contractor - Indicates whether the selected contractor is an authorized contractor.

Date Certificate Received

Enter the date when the contract with the contractor is received.

Insurance Certificate Received

Enable to indicate that an insurance certificate was received from the contractor.

Contact Name

Enter the name of the contact for the service contractor.

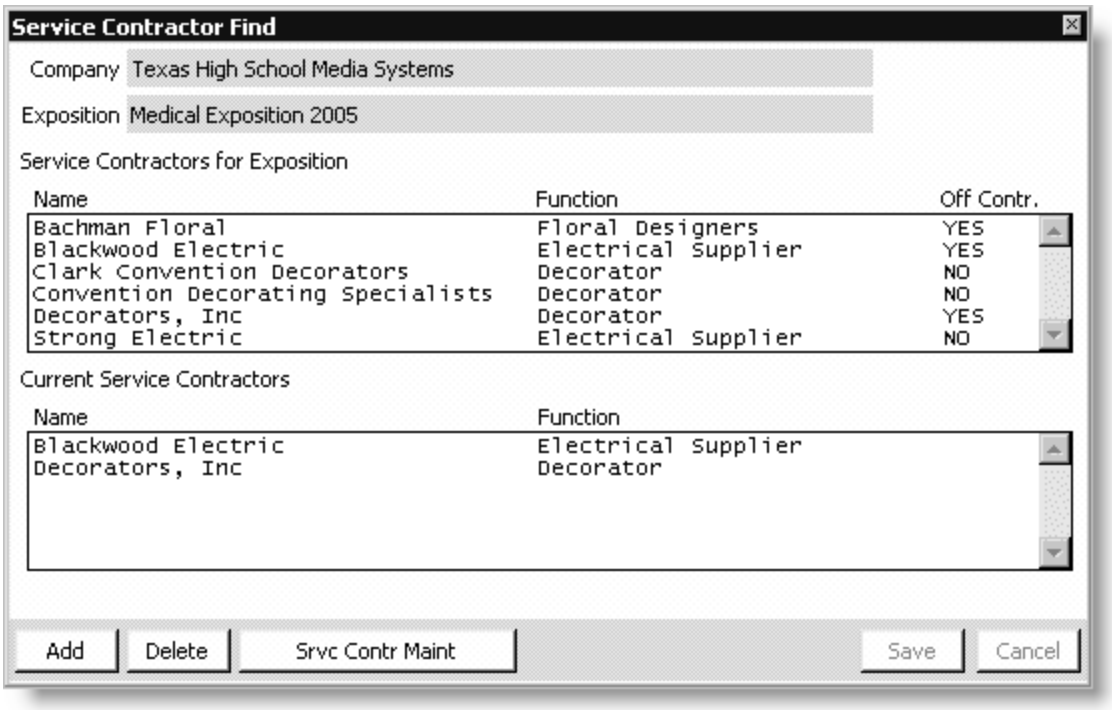
Telephone Number

Enter the contact's telephone number.

Add/Delete button

Opens the Service Contractor Find window used for adding and deleting service contractors.

Service Contractor Find window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, select Service Contractors, and click Add/Delete

Company

Displays the name of the exhibiting company.

Exposition

Displays the name of the selected exposition.

Service Contractors for Exposition

Lists exposition service contractors available to exhibiting companies. This list is generated from the exposition's Service Contractor Maintenance window.

Current Service Contractors

Displays the contractors currently assigned to the exhibitor for the exposition.

Add button

Click to add a contractor to the list of Current Service Contractors for an exhibiting company.

Delete button

Click to delete a contractor from the list of Current Service Contractors for an exhibiting company.

Srvc Contr Maint button

Opens the Service Contractor Maintenance window used for defining service contractors. See Managing Service Contractors for more.

To add a service contractor

1. Open the Current Service Contractors window:

- From Exposition, select View exhibitor information to open the View exhibitor information window.
- Click Open to display the Exposition Search window, and double-click an exposition.
- Double-click an exhibitor to open the Exhibitor Information window.
- Click More, and select Service Contractors.

2. Click Add/Delete to open the Service Contractor Find window.
3. Select a contractor from the Service Contractors for Exposition list, and click Add to move the contractor to the list of Current Service Contractors.
4. Click Save, and return to the Current Service Contractors window.
5. Select a contractor from the list of Current Service Contractors, and enter all applicable information for the contractor.
6. Click Save.

To delete a service contractor

1. Open the Current Service Contractors window:

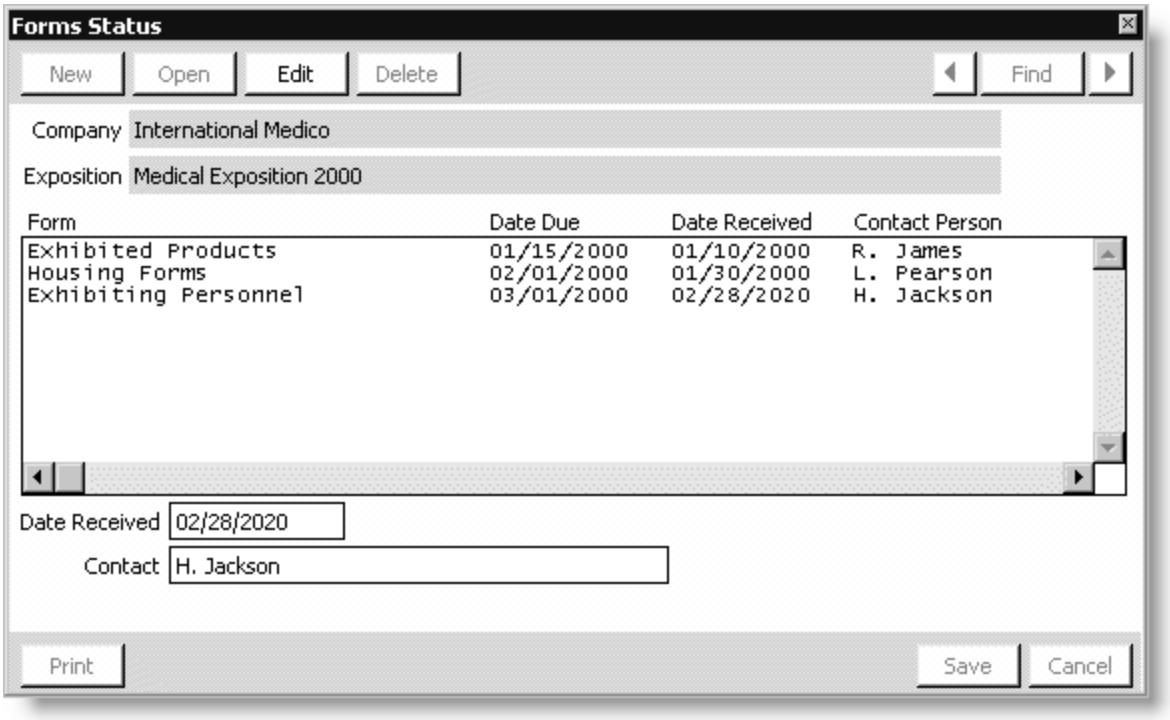
- From Exposition, select View exhibitor information to open the View exhibitor information window.
- Click Open to display the Exposition Search window, and double-click an exposition.
- Double-click an exhibitor to open the Exhibitor Information window.
- Click More, and select Service Contractors.

2. Click Add/Delete to open the Service Contractor Find window.
3. Select a contractor from the list of Current Service Contractors, and click Delete to move the contractor to the Service Contractors for Exposition list. A message prompts you to verify deleting the contractor.
4. Click Yes.
5. Click Save.

Tracking Forms

When you define an exposition, you identify the required forms. You can track these forms through the Forms Status window.

Forms Status window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, and select Form Tracking

Company

Displays the name of the exhibiting company.

Exposition

Displays the name of the current exposition.

Form

Lists all forms identified when you defined the exposition and includes the following:

- Date Due - Displays the date the form should be returned to the contact.
- Date Received - Displays the date that this form was received by the contact.
- Contact - Displays the name of the individual who is the contact for the form.
- Date Received - Enter the date the form was returned.

Contact

Enter the name of the contact person for the form.

To track forms

Forms are added to an exposition when an exposition is set up. If a form you are processing is not on the list, you must add the form to the exposition. (See Managing Exposition Forms.)

1. Open the Forms Status window:

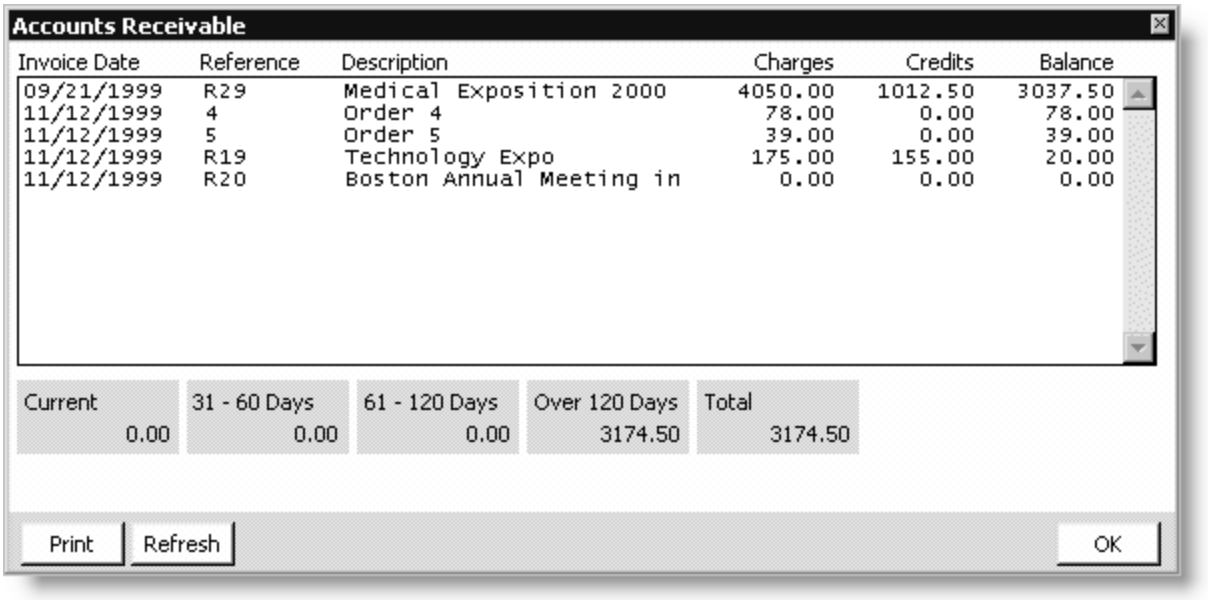
- From Exposition, select View exhibitor information to open the View exhibitor information window.
- Click Open to display the Exposition Search window, and double-click an exposition.
- Double-click an exhibitor to open the Exhibitor Information window.
- Click More, and select Form Tracking.

2. Select one of the forms listed on the Forms Status window.
3. Click Edit.
4. Enter the Date Received.
5. Enter the Contact for this form.
6. Click Save.

Viewing an Exhibitor's Ledger

The Accounts Receivable window displays an exhibitor's cash transactions, and the Transaction Ledger window displays the details of each cash transaction.

Accounts Receivable window



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, and select AR Ledger

Invoice Date

Displays the invoice issue date.

Reference

Displays the product order number the invoice is referencing.

Description

Displays a brief description of the order the invoice is referencing.

Charges

Displays the charges for the invoiced item.

Credits

Displays the credits (if any) for the invoiced item.

Balance

Displays the outstanding balance for the invoiced item.

Current

Displays the outstanding balance for which payments are current.

31 - 60 Days

Displays the outstanding balance for which payments are late by 31 to 60 days.

61 - 120 Days

Displays the outstanding balance for which payments are late by 61 to 120 days.

Over 120 Days

Displays the outstanding balance for which payments are late by over 120 days.

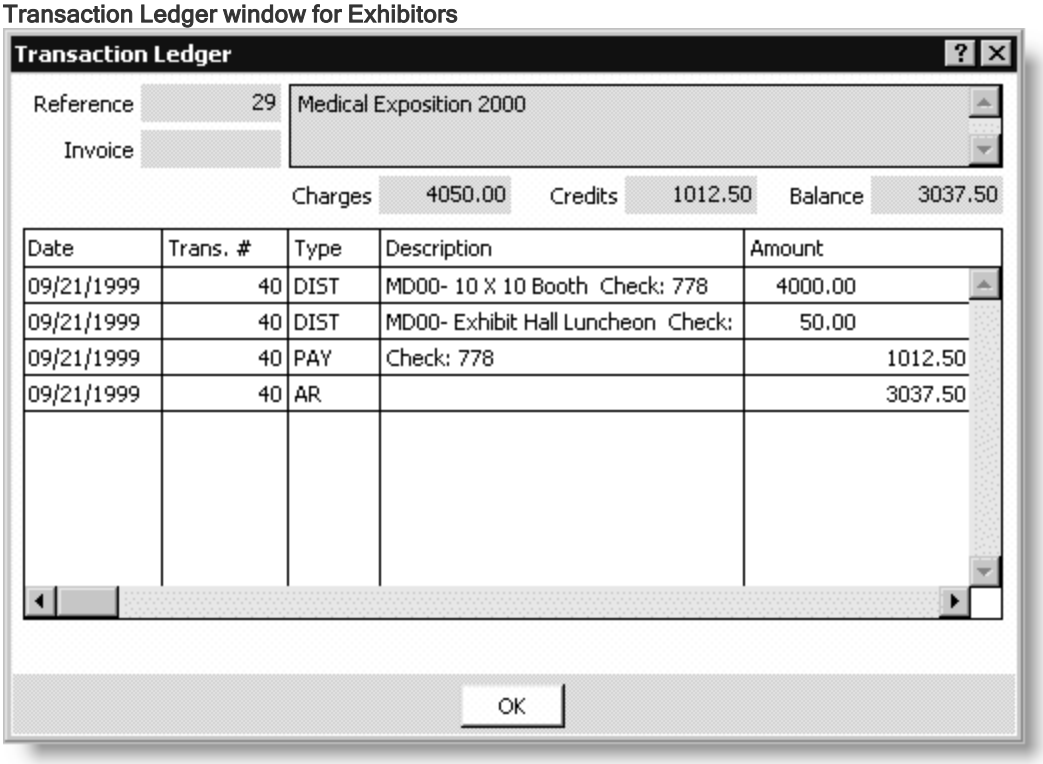
Total

Displays the total outstanding balance for all invoiced items.

Refresh button

Click to refresh the information displayed on the window.

Transaction Ledger window for Exhibitors



From Exposition, select View exhibitor information, open an exposition, double-click an exhibitor, click More, select AR Ledger, and double-click a transaction

Reference

Displays the product order number.

Invoice

Displays the invoice number of the transaction.

Description

Displays the name of the exposition.

Charges

Displays the total charges of the transaction.

Credits

Displays the total credits of the transaction.

Balance

Displays the total balance of the transaction.

To view an exhibitor's ledger

1. Open the Accounts Receivable window:

- From Exposition, select View exhibitor information to open the View exhibitor information window.
- Click Open to display the Exposition Search window, and double-click an exposition.
- Double-click an exhibitor to open the Exhibitor Information window.
- Click More and select AR Ledger.

2. Double-click a line item to open the Transaction Ledger window and view the details of the transaction.

Prospect Lists

Overview of prospect lists

In Exposition Management, prospects are managed primarily as lists, and you add and modify prospects throughout the exposition management process. See Managing Exposition Prospects for more on setting up prospect lists.

Loading Prospect Lists

On the Manage prospect lists window, you can view all prospects for an exposition as well as any individual prospect lists you have created. You also can change a prospect's status, add prospects, view a prospect's activity records, and view a prospect's exposition and registration history.

By default, the number of records that will display on the Manage prospect lists window is 5000. This default can be overridden using the following iSQL statement:

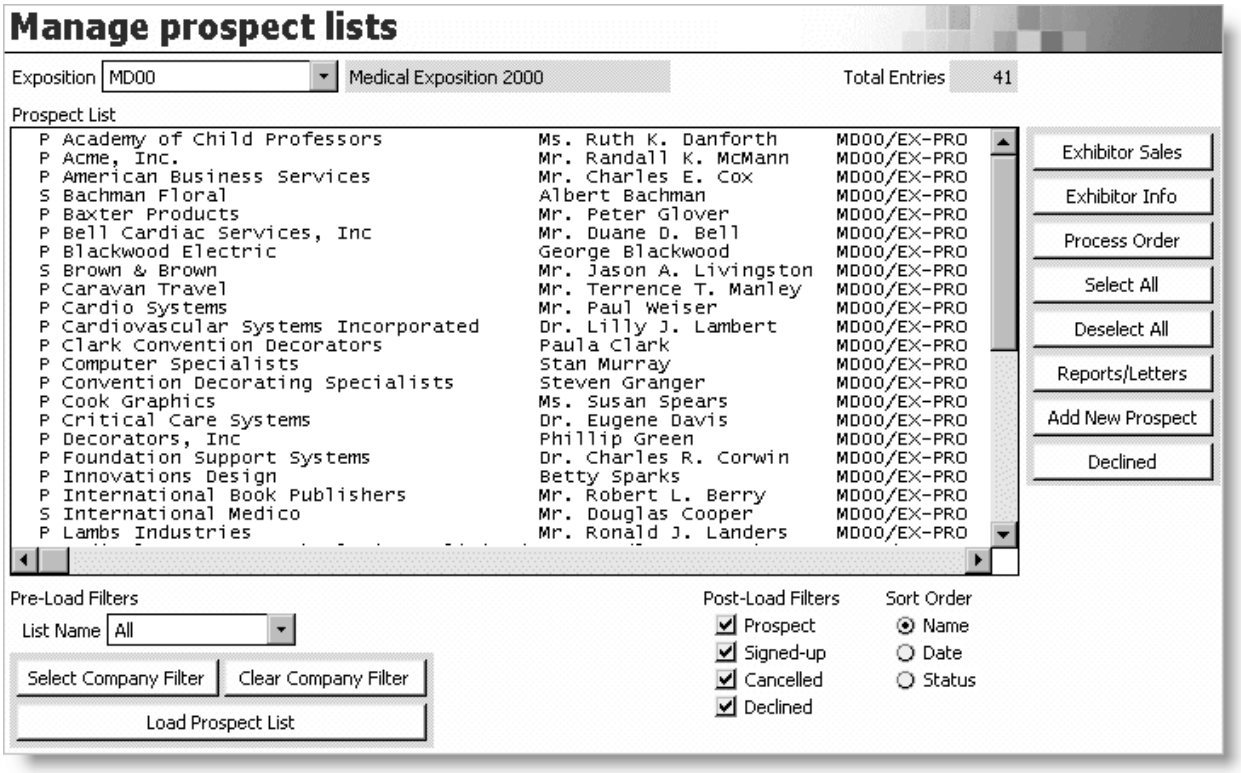
Update System_Params

Set ShortValue = 'xxxx' where ParameterName = 'ExpoControlProspectListMax'

The new default will equal 'xxxx'.

Note: ASI recommends that individual prospect lists be reduced to 5000 or fewer records whenever possible. This will avoid the use of excessive resources.

Manage prospect lists window



From Exposition, select Manage prospect lists

Exposition

Select an exposition from the list. A detailed Description of the exposition displays to the right.

Total Entries

Displays the total number of prospects.

Prospect List

Lists all prospects for the exposition, including name, date, and status. Scroll to the right to see the prospect's last activity and customer type.

Pre-Load Filters

List Name - Select the list of prospects you want to display.

If Enforce list Security by Logon Id is enabled when defining the exposition, only the prospect list assigned to the logon name for a specific iMIS user will display. See Defining Exposition Options for more.

Post-Load Filters

Prospect - Enable to display prospects that have not signed up (and are not on the wait list) but have not declined to exhibit.

Signed-up - Enable to display prospects who already have purchased an exposition product.

Cancelled - Enable to display prospects who have canceled an order.

Declined - Enable to display prospects who have declined to exhibit.

Sort Order

Name - Enable to list prospects alphabetically by last name.

Date - Enable to list prospects by the date that prospect was first added or entered.

Status - Enable to list prospects according to status (Prospect, Signed up, Canceled, or Declined).

Select Company Filter button

Opens the Select Company Filter window to display specific company records.

Clear Company Filter button

Click to clear the filter entered on the Select Company Filter window.

Load Prospect List button

Click to display the prospect list.

Exhibitor Sales button

Opens the Expo Sales window, which lists the exhibiting company's sales activities. You also can view predefined scripts for soliciting exhibitors and information about reserved booths.

Exhibitor Info button

Opens the Exhibitor Information window used for defining exposition-specific information for the exhibitor, such as products exhibited or contractors selected. See Entering Exhibitor Information for detailed information.

Process Order button

Opens the Exposition Orders window used for entering and editing orders. See Processing Orders (see "Exposition Orders") for detailed information.

Select All button

Click to select all records. iMIS places a > next to all records, indicating they are selected.

Deselect All button

Deselects all records. iMIS removes the > next to all records, indicating they are no longer selected.

Reports/Letters button

Opens the Expo Prospect Reports window used for processing letters, labels, and mail merges.

Add New Prospect button

Opens the Add a Prospect window used for adding individual prospects to the prospect list.

Declined button

Click to set the selected prospect's status to Declined.

To load a prospect list

1. From Exposition, select Manage prospect lists to open the Manage prospect lists window.
2. Select an Exposition from the list.
3. Filter the list:

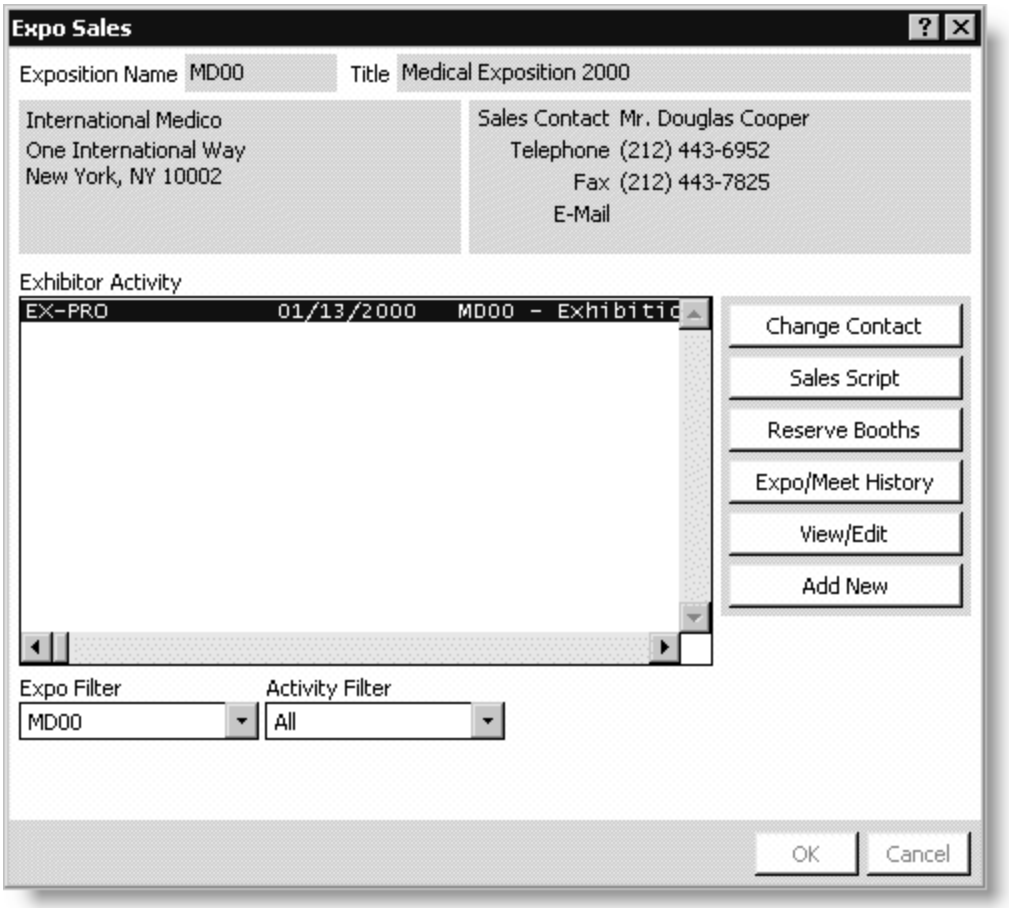
- Select a List Name filter (defaults to All).
- (optional) Click Select Company Filter to open the Select Company Filter window. Enter a company search string. For example, enter a C to view all companies that start with the letter C.

4. Click Load Prospect List to display a list of prospects. If a message prompts you to narrow your search, click OK, and refine your prospect list filters.

Managing Exhibitor Sales

Use the Expo Sales window to manage exhibitor and prospect sales.

Expo Sales window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, and click Exhibitor Sales

Exposition Name

Displays the exposition where the company is exhibiting.

Title

Displays the title of the exposition.

Exposition Address

Displays the address of the exposition.

Contact Information

Displays the exposition's contact information.

Exhibitor Activity

Lists the prospect's exposition-related activities.

Expo Filter

Select an exposition for the prospect whose activities you want to view (defaults to current exposition). When both the Expo Filter and Activity Filter are set to ALL, all activities (regardless of type) display for the prospect.

Activity Filter

Select an activity type for the prospect whose activities you want to view (defaults to ALL - which includes user defined activities).

Change Contact button

Opens the Find window where you can select and assign another sales contact from the customer database. See Finding Exposition Orders for more.

Sales Script button

Opens the Sales Script window where you can predefine your sales scripts.

Reserve Booths button

Opens the Reserve Products window to reserve products for the prospect.

Expo/Meet History button

Opens the Expositions/Meetings for (Name of exhibitor) window where you can view the Current Expos/Meetings for which the prospect is registered and their Attendance History.

View/Edit button

Opens the prospect's Activity Detail window. See Enabling System Options for more on exposition activities.

Add New button

Opens the Activity Detail window where you can add an activity for the prospect. See Enabling System Options for more on exposition activities.

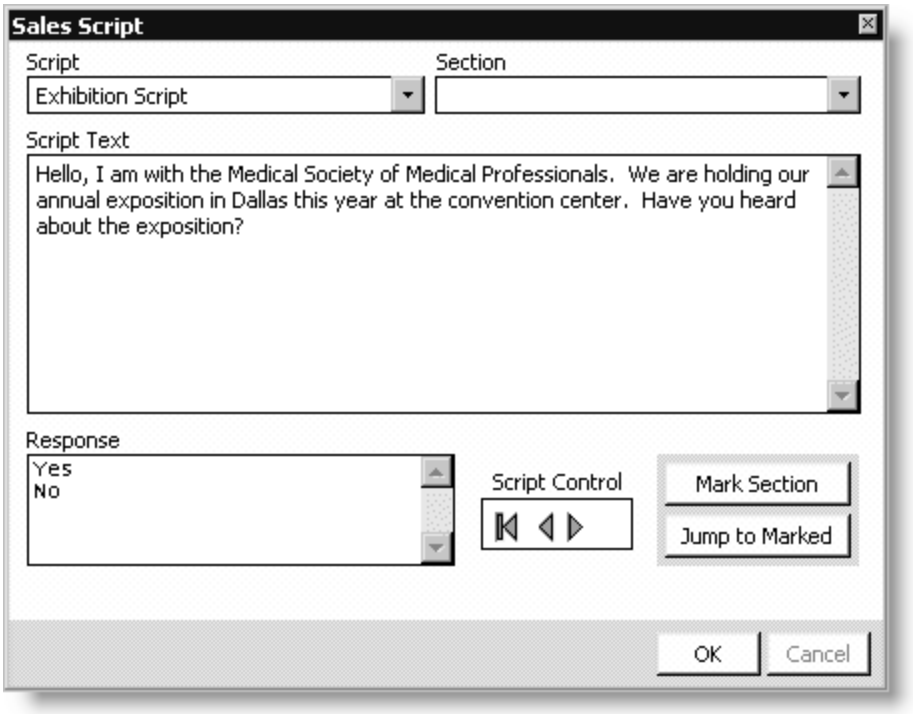
To open the Expo Sales window

1. From Exposition, select Manage prospect lists to open the Manage prospect lists window.
2. Load a prospect list. See To load a prospect list for more.
3. Select a prospect from the Prospect List.
4. Click Exhibitor Sales.

Using Sales Scripts

Using a standard sales script for your exposition allows you to have multiple salespeople even if they are not members of your staff. Using the script you created for the exposition, which includes prompts for each response, all salespeople appear knowledgeable about the show.

Sales Script window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, click Exhibitor Sales, and click Sales Script

Script

Select a list.

Section

Select a section of a list.

Script Text

Displays the text of the selected section.

Response

Lists responses associated with the selected section.

Script Control

Select to move forward and backward through the script sections.

Mark Section button

Click to mark a section of the script.

Jump to Marked button

Click to jump to marked sections of the script.

To use sales scripts

1. Open the Expo Sales window:

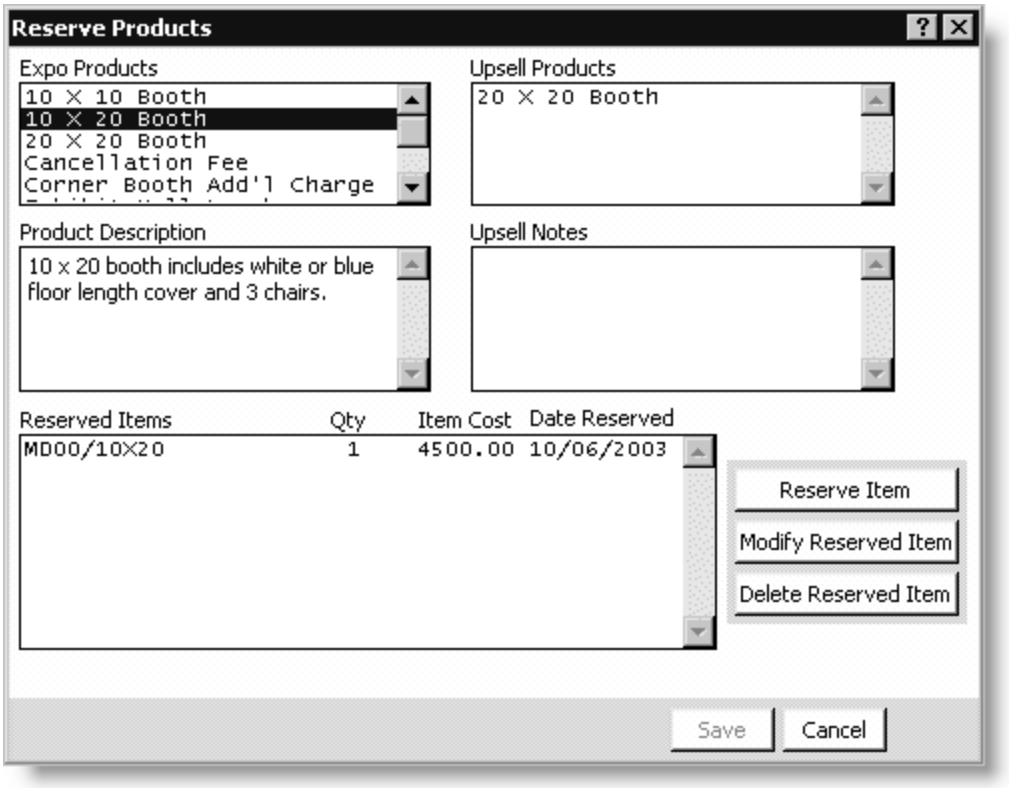
- From Exposition, select Manage prospect lists to open the Manage prospect lists window.
- Load a prospect list. See To load a prospect list for more.
- Select a prospect from the Prospect List.
- Click Exhibitor Sales.

2. Click Sales Script to open the Sales Script window.
3. Select a Script from the drop-down list.
4. Select a script Section from the drop-down list. The Script Text displays.
5. Read the script text, and double-click the appropriate Response. Based on the response you select, move to the next appropriate section.
6. Click Mark Section to put a temporary placeholder on a section. You can continue to move forward with the script, but if you need to return to the marked section, click Jump to Marked.
7. Click the Script Control arrows to jump back to the beginning of your script or to move forward or backward through the script.
8. Click OK.

Reserving Products

Use the Reserve Products window to reserve booths and other exposition products. Reserving an exposition product is not the same as ordering an exposition product. Unlike orders, reservations usually are made without payments or contracts.

Reserve Products window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, click Exhibitor Sales, and click Reserve Booths

Expo Products

Select from a list of available exposition products.

Upsell Products

Select from a list of available upsell products for the product selected from the list of Expo Products.

Product Description

Displays a description of the selected exposition product.

Upsell Notes

Displays comments relating to the selected upsell exposition product.
The upsell product must be selected for the note to display.

Reserved Items

Lists reserved exposition products.

Qty

Displays the number of reserved exposition products.

Item Cost

Displays the cost of the reserved exposition product.

Date

Displays the date the exposition product was reserved.

Reserve Item button

Opens the Reservation window where you can select from the list of available booths.

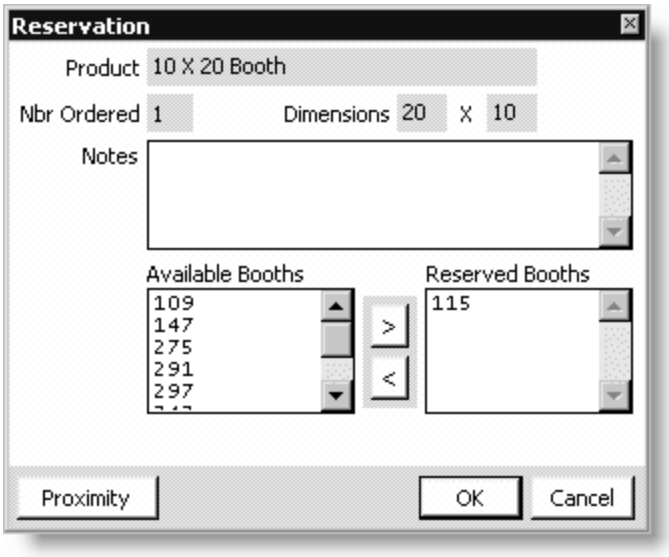
Modify Reserved Item button

Opens the Reservation window where you can modify the reservation information for the selected product.

Delete Reserved Item button

Click to delete the selected product from the list of Reserved Items.

Reservation window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, click Exhibitor Sales, click Reserve Booths, select a product, and click Reserve Item

Product

Displays the selected product.

Nbr Ordered

Displays the number of the selected products ordered.

Dimensions

Displays the dimensions of the selected product.

Notes

Displays additional information about the product.

Available Booths

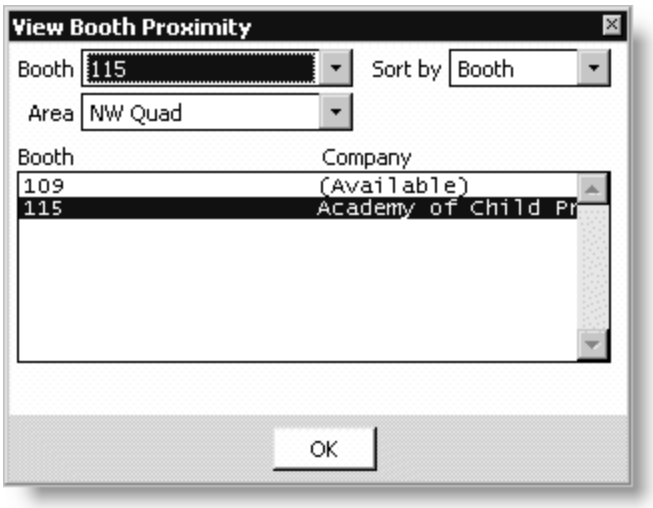
Lists the booths that are available.

Reserved Booths

Lists the booths that have been reserved.

Proximity button

Opens the View Booth Proximity window.



Booth - Select a booth.

Sort by - Select a sort method.

Area - Select an area of proximity.

To reserve a product and view booth proximity

1. Open the Expo Sales window:

- From Exposition, select Manage prospect lists to open the Manage prospect lists window.
- Load a prospect list. See To load a prospect list for more.
- Select a prospect from the Prospect List.
- Click Exhibitor Sales.

2. Click Reserve Booths to open the Reserve Products window.
3. Select a product from the list of Expo Products.
4. Click Reserve Item to open the Reservation window.
5. Double-click a booth from the Available Booths list to move the booth to the Reserved Booths list.
6. (optional) View booth proximity:

- Click Proximity to open the View Booth Proximity window.
- Select a Booth for the product selected on the Reserve Products window.
- Select the proximity Area.
- Click OK to return to the Reservation window.

7. Click OK to return to the Reserve Products window.
8. Click Save.

Note: At this point, the EX-RES activity is created for the reserved product(s). This activity is deleted once the booth size that was reserved is actually ordered. Reserved products display as “reserved” when processing booth inventory assignments for other orders, which can be viewed on the Booth Inventory Assignment window.

Note: See Enabling System Options for more on activities.

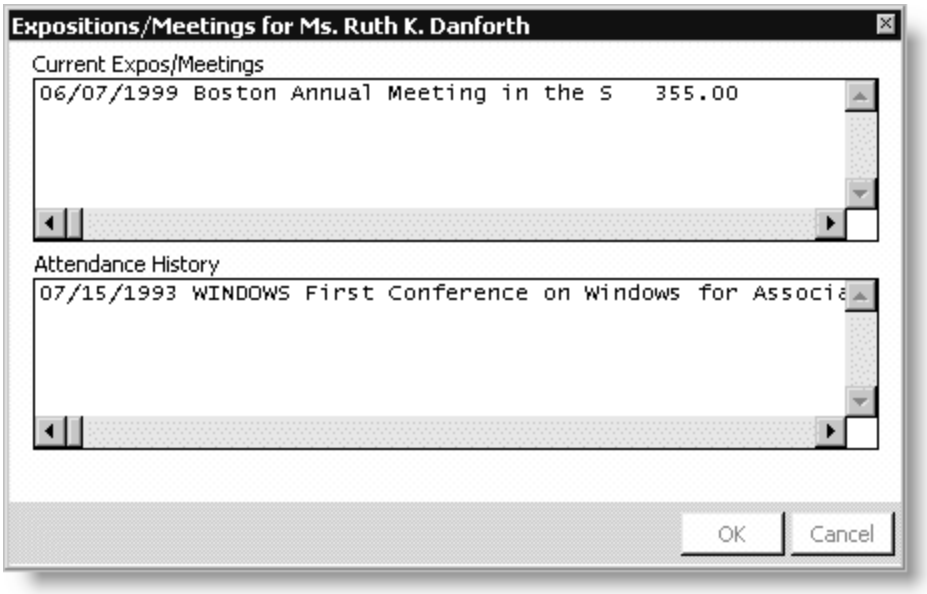
To modify or delete a reserved product

1. Open the Expo Sales window:
   - From Exposition, select Manage prospect lists to open the Manage prospect lists window.
   - Load a prospect list. See To load a prospect list for more.
   - Select a prospect from the Prospect List.
   - Click Exhibitor Sales.
2. Click Reserve Booths to open the Reserve Products window.
3. Select the product from the list of Expo Products that you want to modify or delete.
4. (optional) To modify a product, do the following:
   - Click Modify Reserved Item to open the Reservation window.
   - Make any necessary changes.
   - Click OK to return to the Reserve Products window.
   - Click Save.
5. (optional) To delete a product, do the following:
   - Click Delete Reserved Item.
   - Click Save.

Viewing Exposition History

Use the Expositions/Meetings for window to track your prospects' exhibit history with your organization.

Expositions/Meetings for window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, click Exhibitor Sales, and click Expo/Meet History

Current Expos/Meetings

Displays the expositions and events for which the prospect is currently registered.

Attendance History

Displays the prospect's attendance history.

To view a prospect's exposition order history

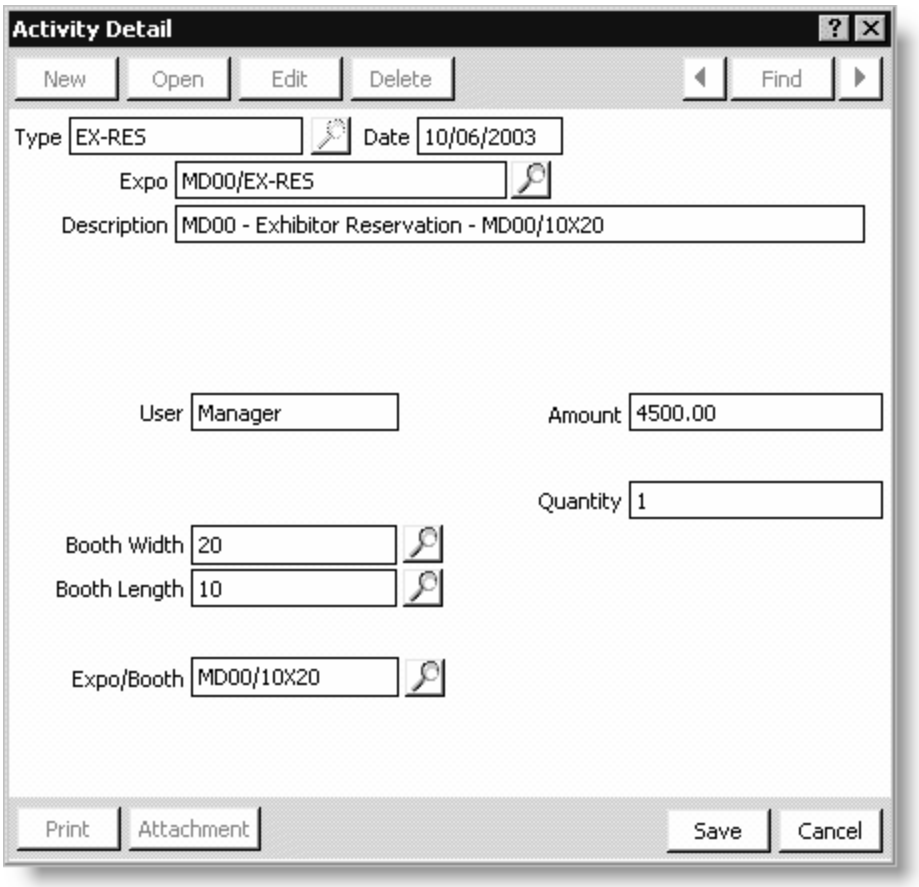
1. From Exposition, select Manage prospect lists to open the Manage prospect lists window.
2. Load a prospect list. See To load a prospect list for more.
3. Select a prospect.
4. Click Exhibitor Sales to open the Expo Sales window.

5. Click Expo/Meet History to open the Expositions/Meetings for window, which displays all expositions and events the prospect has attended.

Managing Activity Records for Exhibitors

Through the Expo Sales window, you can access the Activity Detail window and add information to an exhibitor's activity record.

Exposition Activity Detail window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, click Exhibitor Sales, and click View/Edit

Type

Select an activity type, such as CALL, COMMITTEE, or EXPO. Select the Find icon to look up an activity type.

Date

Enter the date of the activity.

Additional Fields

Additional fields display on the Activity Detail window depending on the activity type and which user-defined fields are mapped to the window. See Enabling System Options for more on mapping user-defined fields and default exposition activity types.

Attachment button

Not applicable.

To view or edit an Exposition activity record

1. Open the Expo Sales window:

- From Exposition, select Manage prospect lists to open the Manage prospect lists window.
- Load a prospect list. See To load a prospect list for more.
- Select a prospect from the Prospect List.
- Click Exhibitor Sales.

2. Select an Expo Filter and an Activity Filter.
3. Select the Exhibitor Activity you want to view.
4. Click View/Edit to open the Activity Detail window.
5. (optional) Make any necessary changes.
6. Click Save.

To add an activity record

1. Open the Expo Sales window:

- From Exposition, select Manage prospect lists to open the Manage prospect lists window.
- Load a prospect list. See To load a prospect list for more.

- Select a prospect from the Prospect List.
- Click Exhibitor Sales.

2. Click Add New to open the Activity Detail window.
3. Enter an Activity Type (select the Find icon to look up an activity type). Press Tab to display the appropriate fields for the activity type.
4. Enter all applicable information.
5. Click Save.

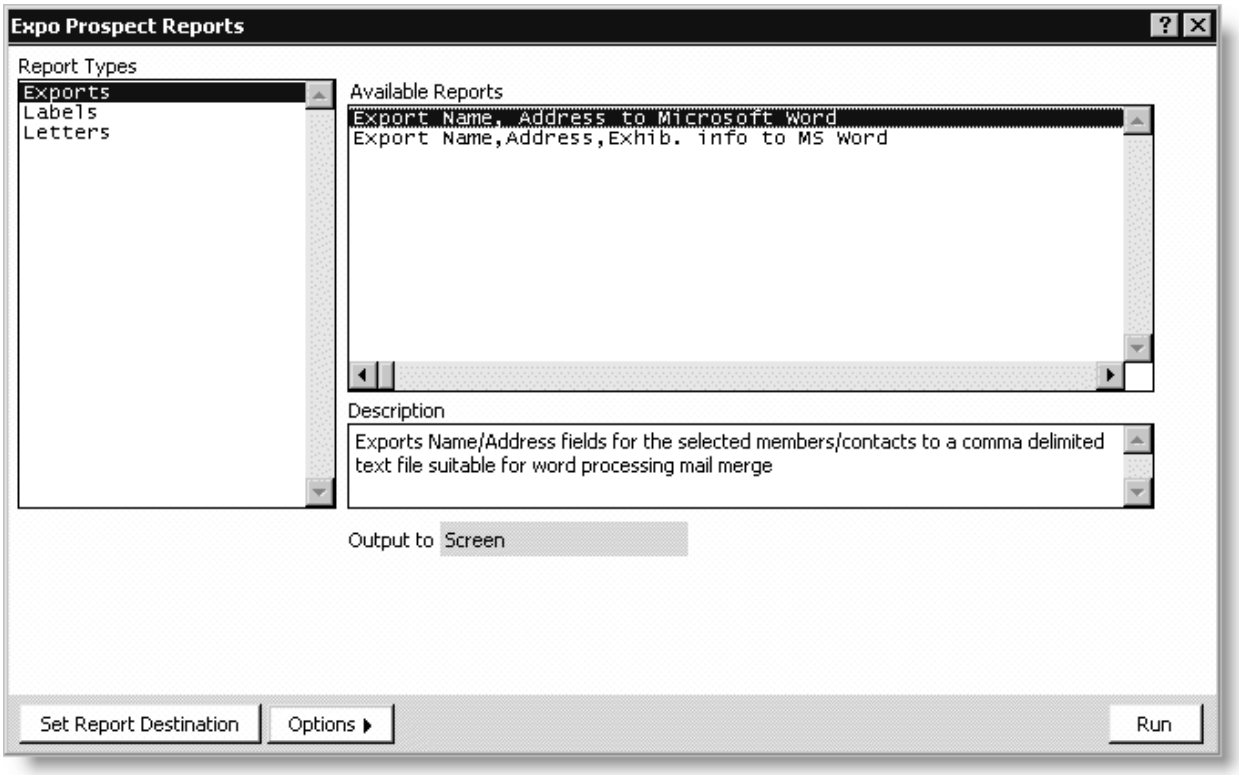
To view Exposition activities from Customer Management

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Open or Find to find a record.
3. Select the Exposition tab, and double-click an activity to open the Process booth orders window.

Generating Expo Letters and Reports

Exposition Management allows you to generate standard letters and labels, and create exports for mail merges from the Manage prospect lists window. This is convenient when you want to send just one letter. Letters can be generated for one prospect or multiple prospects, and you can generate reports by selecting all prospects or just those from specified prospect lists. You also can generate an export report in the Expo Sales window for an individual prospect.

Expo Prospect Reports window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, and click Reports/Letters

Report Types

Lists available report types.

Available Reports

Lists available reports for the selected Report Type.

Description

Displays a description of the report you have selected.

Output to

Displays the report destination.

Set Report Destination button

Opens the Report Destination window to select the report destination, such as Printer or Screen.

Options button

Click to display a menu of options available for the selected report. Options are disabled when they are not available for a selected report.

- Margins - available for Labels Report Types
- Search Format - available for all Report Types
- Sort Fields - available for all Report Types
- Export Format - available for Exports Report Types
- Additional Fields - available for Labels Report Types
- Letter Text - available for Letters Report Types
- Save - available for all Report Types
- Save As - available for all Report Types

Run button

Click to generate the letter or report you have selected.

To generate a report from the Expo Prospect Reports window

1. Open the Expo Prospect Reports window:

- From Exposition, select Manage prospect lists to open the Manage prospect lists window.
- Load a prospect list. See To load a prospect list for more.
- Select a prospect (or prospects) from the Prospect List.
- Click Select All to select all prospects.
- Click Reports/Letters.

2. Select a report type from the list of Report Types.
3. Select a report from the list of Available Reports.
4. Click Set Report Destination, and set the report destination.
5. Click Run to generate the letter.

To create or edit a letter from the Expo Prospect Reports window

1. Open the Expo Prospect Reports window:

- From Exposition, select Manage prospect lists to open the Manage prospect lists window.
- Load a prospect list. See To load a prospect list for more.
- Select a prospect (or prospects) from the Prospect List.
- Click Select All to select all prospects.
- Click Reports/Letters.

2. Select Letters from the list of Report Types.
3. Select a letter from the list of Available Reports.
4. Click Options, and select Letter Text to open the Letter Text window.
5. Edit the text of the letter.
6. To save the edited letter as a new letter, do the following:

- Click Save as Standard to open the Letter Name window.
- Enter the name of the new letter.
- Click Save.

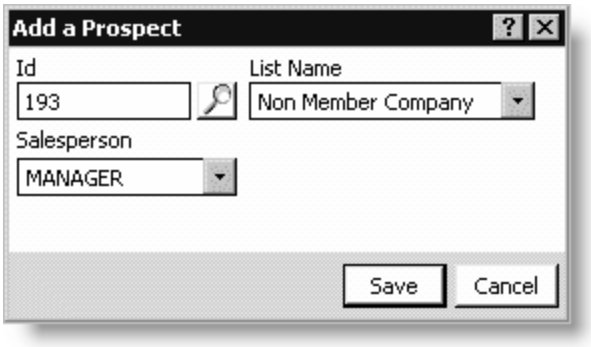
7. Click Print to generate the letter.

Adding Prospects

Exposition Management gives you the flexibility to add new prospects to existing prospect lists while marketing your expositions. All new prospects must have a record in the customer database.

Note: To allow your salespeople to add prospects, you must enable the Allow Sales People to Add Prospects option on the Expo Sales window.

Add a Prospect window



From Exposition, select Manage prospect lists, select an exposition, click Load Prospect List, and click Add New Prospect

Id

Enter the ID of the prospect you are adding. Select the Find icon to look up an ID.

List Name

Select a prospect list.

Salesperson

Select a salesperson.

To add a prospect

1. From Exposition, select Manage prospect lists to open the Manage prospect lists window.
2. Select an Exposition.
3. Click Add New Prospect to open the Add a Prospect window.

4. Enter the prospect's Id (select the Find icon to look up an ID). If adding a new prospect that does not have an ID, do the following:

- Press Tab in the Id field to open the Expo Prospect - Name/Address window.
- Enter a Member Type (required) and all other applicable information about the new prospect.
- Click Save to return to the Add a Prospect window.

5. Select a List Name (select NONE if you do not want to assign the prospect to a specific list).
6. Select a Salesperson (select NONE if you do not want to assign the prospect to a specific salesperson).
7. Click Save.

Booth Preferences

Overview of booth preferences

Many organizations sell their booth products using a lottery method - assigning booth preferences to exhibitors based on priority points or rank rather than the first-come, first-served method. Using a lottery system, exhibitors select first, second, third, and succeeding booth preferences.

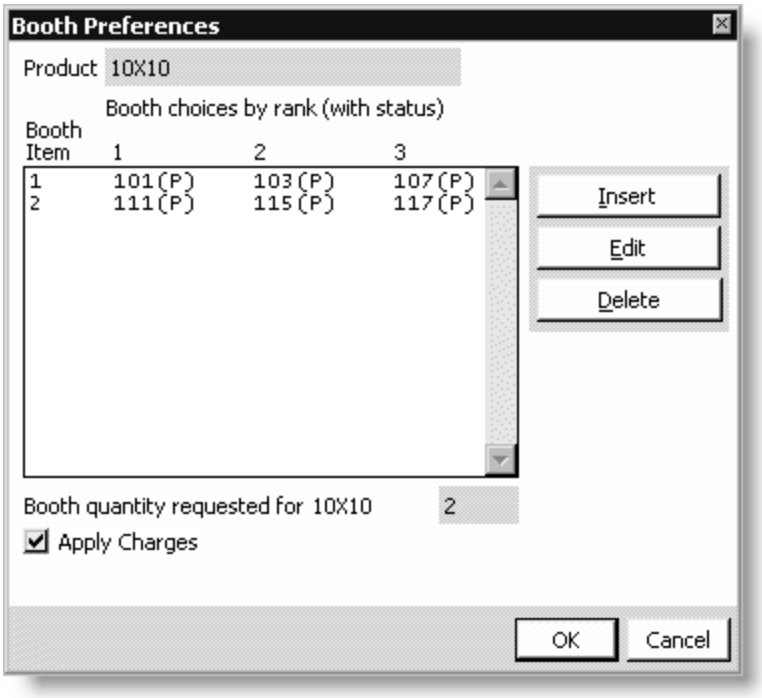
Exhibitors usually are assigned booth preferences based on exhibition history, amount of space purchased, date of contract, or other criteria useful in establishing exhibitor rank. iMIS Exposition Management enables you to enter booth preferences for exhibitors and then assign booths based on your established criteria.

Assigning Exhibitor Booth Preferences

iMIS Exposition Management enables you to assign exhibitor booth preferences for pending expositions (P status). If Check Booth Inventory for Preferences is enabled on the exposition's Expo Options window, you can assign booth preferences only for inventoried booths (see Managing Booth Inventory for additional information).

Enter exhibitor booth preferences on the Booth Preferences and Preference Booth Select windows.

Booth Preferences window



From Exposition, select Process booth orders, insert or edit an order for an exposition with a P status, and double-click a booth product

Product

Displays the selected booth.

Booth Item

Displays the sequentially numbered booth products that have been purchased.

Booth choices by rank (with status)

Displays the exhibitor's booth preferences. For example, an exhibitor selects booth 101 as the first choice, booth 103 as the second choice, and booth 105 as the third choice for the first Booth Item.

Insert button

Opens the Preference Booth Select window to enter an exhibitor's preferred booth numbers.

Edit button

Opens the Preference Booth Select window to edit an exhibitor's preferred booth numbers.

Delete button

Click to delete the selected booth preferences.

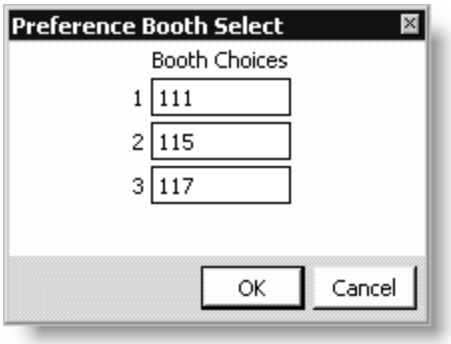
Booth quantity requested for

Displays the number of selected booth items.

Apply Charges

Enable to charge an exhibitor for the pending booths when setting booth preferences. The Qty and Price fields populate automatically for the order on the Process booth orders window.

Preference Booth Select window



From Exposition, select Process booth orders, insert or edit an order for an exposition with a P status, double-click a booth product, and click Insert

Booth Choices

Enter your first, second, and third booth preferences for a specific booth product.

To assign booth preferences

1. From Exposition, select Process booth orders to open the Process booth orders window.

2. Enter or edit an order for a pending exposition (see Finding Exposition Orders).
3. (optional) If entering an order, a message prompts you to continue with the registration as you Tab out of the Exposition field. Click Yes.
4. While in edit mode, double-click the appropriate booth Product to open the Booth Preferences window (opens only for pending expositions).
5. Click Insert on the Booth Preferences window to open the Preference Booth Select window.
6. Enter the booth number of the first, second, and third choice for each booth requested by the exhibitor. For example, if the exhibitor plans to purchase four booths, click Insert four times, each time entering the first, second, and third choice for each booth. Room for four booth entries exists on the Booth Preferences window.

   Note: If Check Booth Inventory for Preferences is enabled for the pending exposition, you cannot enter a booth number that is not part of booth inventory.
7. (optional) Enable Apply Charges to charge the exhibitor for the pending booths. The order can be billed as soon as the preferences are recorded for the exhibitor.
8. Click OK to return to the Booth Preferences window, and click OK to return to the Process booth orders window.
9. Click Save.

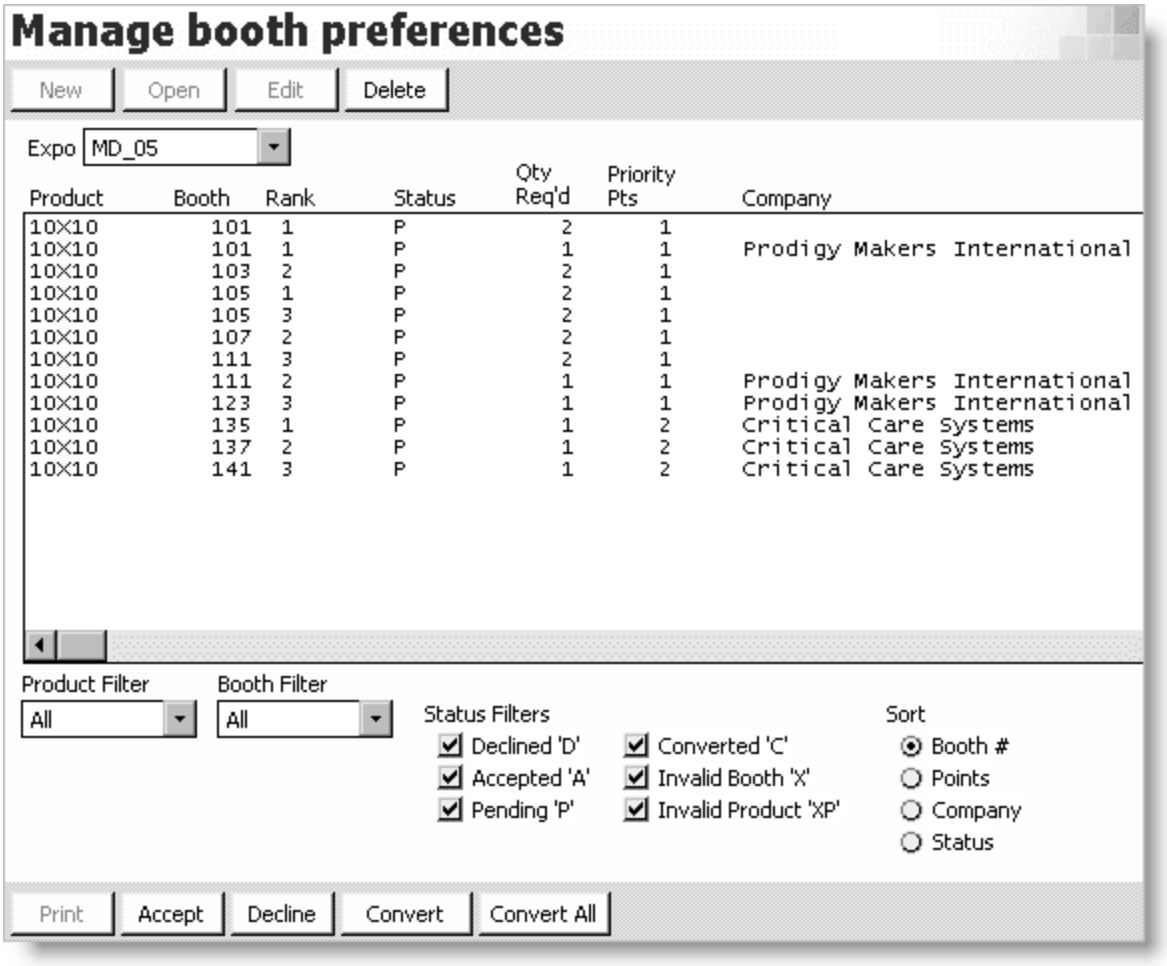
Accepting, Declining, Converting, and Deleting Exhibitor Booth Preferences

After you enter exhibitor booth preferences, you can assign booths. Most exposition managers use priority points (defined on the Exhibitor Information window) to determine who has first preference for booth products. Regardless of the criteria used to assign booth preferences, you must use some method for determining who will have first preference.

Booth preferences are analyzed and managed on the Manage booth preferences window. This window lists all the booth preferences that have been requested by exhibiting companies for a specific exposition. On this window, you can accept, decline, convert, or

delete booth preferences. When you accept a booth preference, you indicate that that booth will be assigned to the exhibitor requesting it. After an exhibitor accepts a booth, the selection of that booth by any other company is automatically declined. This prevents you from assigning duplicate booths.

Manage booth preferences window



From Exposition, select Manage booth preferences

Expo

Select an exposition from the list.

Exhibitor Booth Preferences

Displays all exhibitors' booth preferences for the selected exposition.

Product Filter

Select a specific filter from the list. Only Exhibitor Booth Preferences for that product display.

Booth Filter

Select a booth for the product selected from the Product Filter list. Only Exhibitor Booth Preferences for that booth display.

Status Filters

Enable the appropriate filters:

- Declined D - Enable to view booth preferences that have been declined.
- Accepted A - Enable to view booth preferences that have been accepted and will be converted to assigned booths.
- Pending P - Enable to view booth preferences that have not been accepted or declined.
- Converted C - Enable to view booth preferences that have been accepted and converted.
- Invalid Booth X - Enable to view booth preferences that are assigned or booths that do not exist.
- Invalid Product XP - Enable to view exposition products that do not exist.

Sort

Enable the appropriate options:

- Booth # - Enable to sort the list by booth number.
- Points - Enable to sort the list by priority points.
- Company - Enable to sort the list alphabetically by company name.
- Status - Enable to sort the list by status.

Status buttons

This group of buttons allows you to process and apply preferences:

- Accept button - Click to accept booth preferences prior to conversion.
- Decline button - Click to decline booth preferences.
- Convert button - Click to convert accepted booth preferences into actual booth orders.
- Convert All button - Click to convert all booth preferences that have been accepted into product orders.
- Delete button - Click to delete individual booth preferences.

To accept booth preferences

You must accept exhibitor booth preferences before converting booth preferences.

1. From Exposition, select Manage booth preferences to open the Manage booth preferences window.
2. Select an exposition from the Expo list to display all booth preferences.
3. (optional) Filter and sort the list:
   - Select a Product Filter.
   - Select a Booth Filter.
   - Sort the list.
4. Select the Exhibitor Booth Preferences you want to accept, and click Accept. A message prompts you to continue.
5. Click Yes. All unaccepted booth preferences have a D (declined) status.

To decline booth preferences

1. From Exposition, select Manage booth preferences to open the Manage booth preferences window.
2. Select the booth preferences you want to decline from the list of Exhibitor Booth Preferences.

3. Click Decline. A message prompts you to verify declining the selected entries.
4. Click Yes.

To convert booth preferences

After accepting booth preferences, convert the preferences to orders. You can convert preferences individually or all together.

1. From Exposition, select Manage booth preferences to open the Manage booth preferences window.
2. Accept all applicable booth preferences for the selected exposition. See To accept booth preferences for more.
3. (optional) To convert selected booth preferences, do the following:
4. Select the booth preferences you want to convert.

- Click Convert. A message prompts you to continue.
- Click Yes to convert the selected booth preferences.

5. (optional) To convert all booth preferences, do the following:

- Click Convert All. A message prompts you to continue.
- Click Yes to convert all the accepted booth preferences.

To delete booth preferences

1. From Exposition, select Manage booth preferences to open the Manage booth preferences window.
2. Select the booth preferences you want to delete.
3. Click Delete. A message prompts you to verify deleting the selected booth preferences.
4. Click Yes.

Exposition System Setup

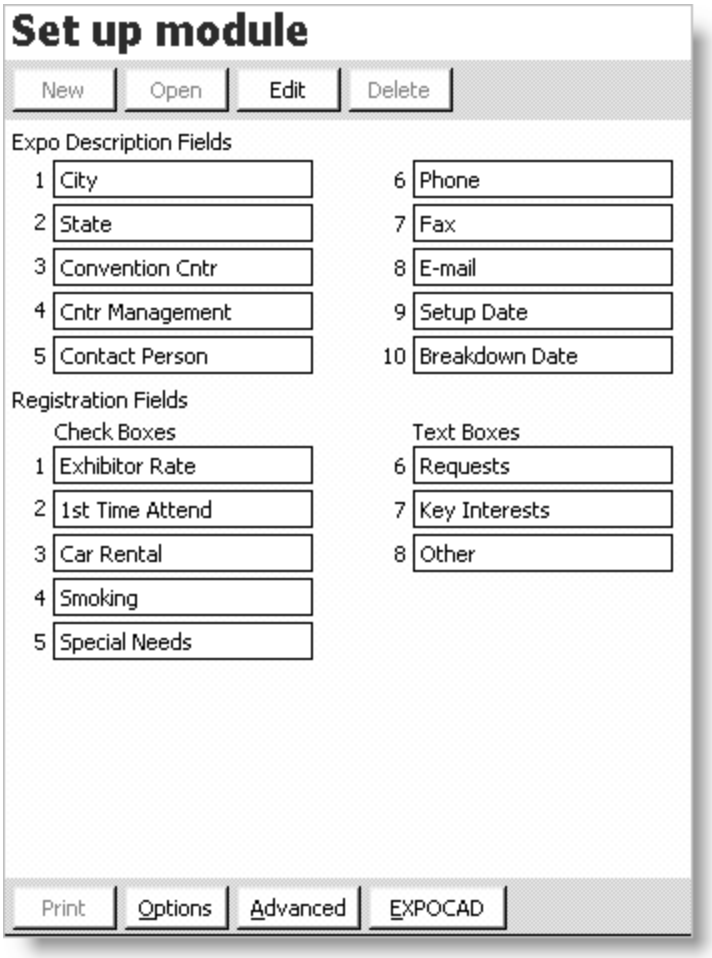
Overview of Exposition Setup

Exposition has many advanced features that enable you to customize your module. Based on your organization's requirements, you can select from a number of options that have global implications for managing your expositions.

You set up and customize your Exposition Management module through the Exposition Set up module window.

See AR/Cash: Deferred Income for how to defer dues/subscriptions income and event-s/exhibition/exposition income.

Set up Expo module window



From Exposition, select Set up module

Expo Description Fields

Enter the field labels that will display on the Expo Description window (from Exposition, select Set up an exposition, double-click an exposition, click More, and select Description).

The user-defined Expo Description Fields will display on the Expo Description window only if labels are defined for the fields on the Set up module window.

Registration Fields

Enter the field labels that will display on the Expo Registration - Other window (from Exposition, select Process booth orders, open an order, click Options, and select Other).

The user-defined Registration Fields will display on the Expo Registration - Other window only if labels are defined for the fields on the Set up module window. Both checkboxes and text boxes are available.

Options button

Opens the Expo System Options window.

Advanced button

Opens the Expo Advanced Features window.

EXPOCAD button

(Displays only if licensed for ExpoCad) Opens the ExpoCad System Options window.

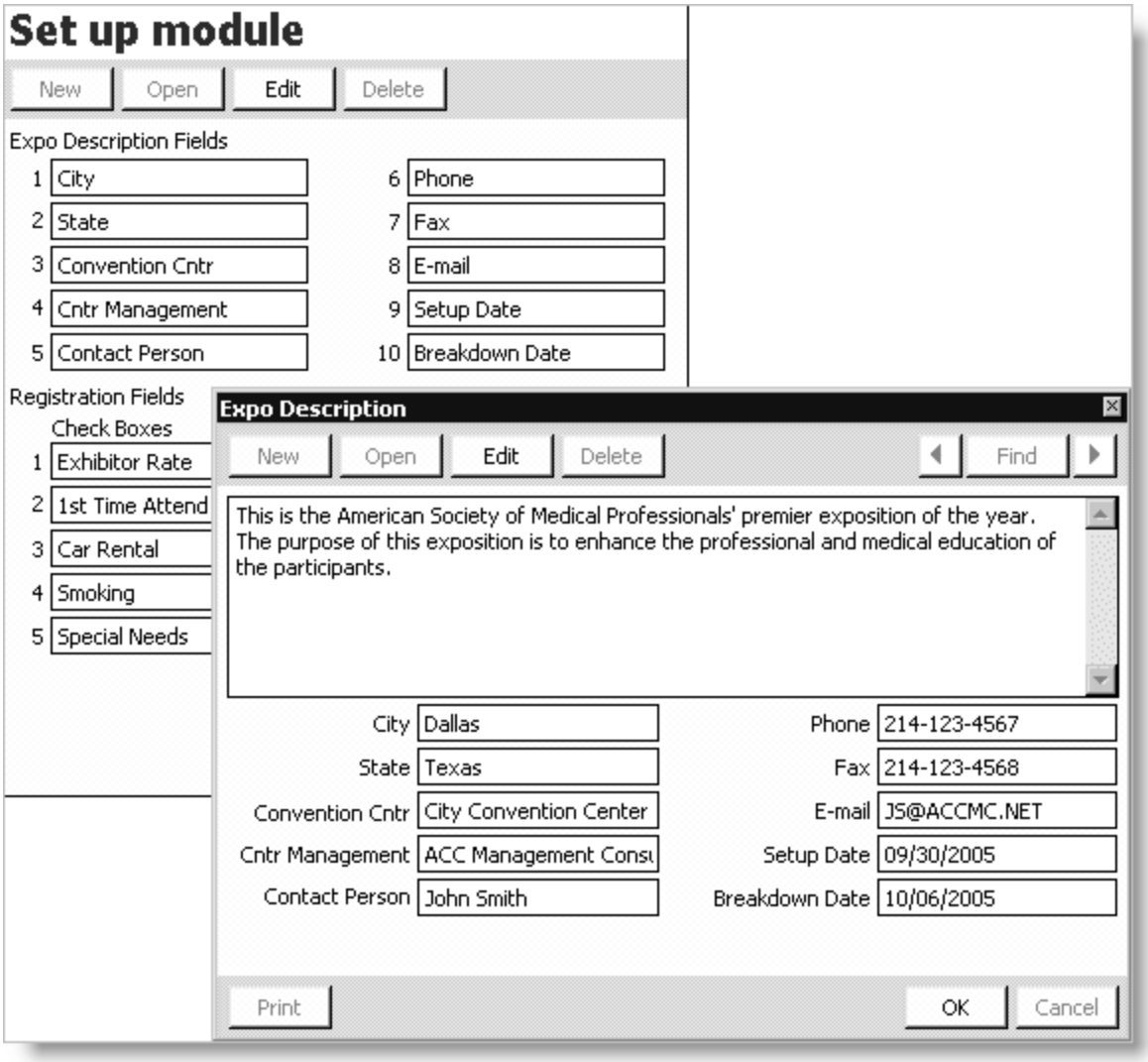
Creating User-Defined Fields

On the Exposition Set up module window, create the custom, user-defined fields that you want to display on the Expo Description and Expo Registration - Other windows.

Note: The user-defined fields display on the Expo Description and Expo Registration - Other windows only when labels are created for the user-defined fields on the Exposition Set up module window.

To create user-defined fields for the Expo Description window

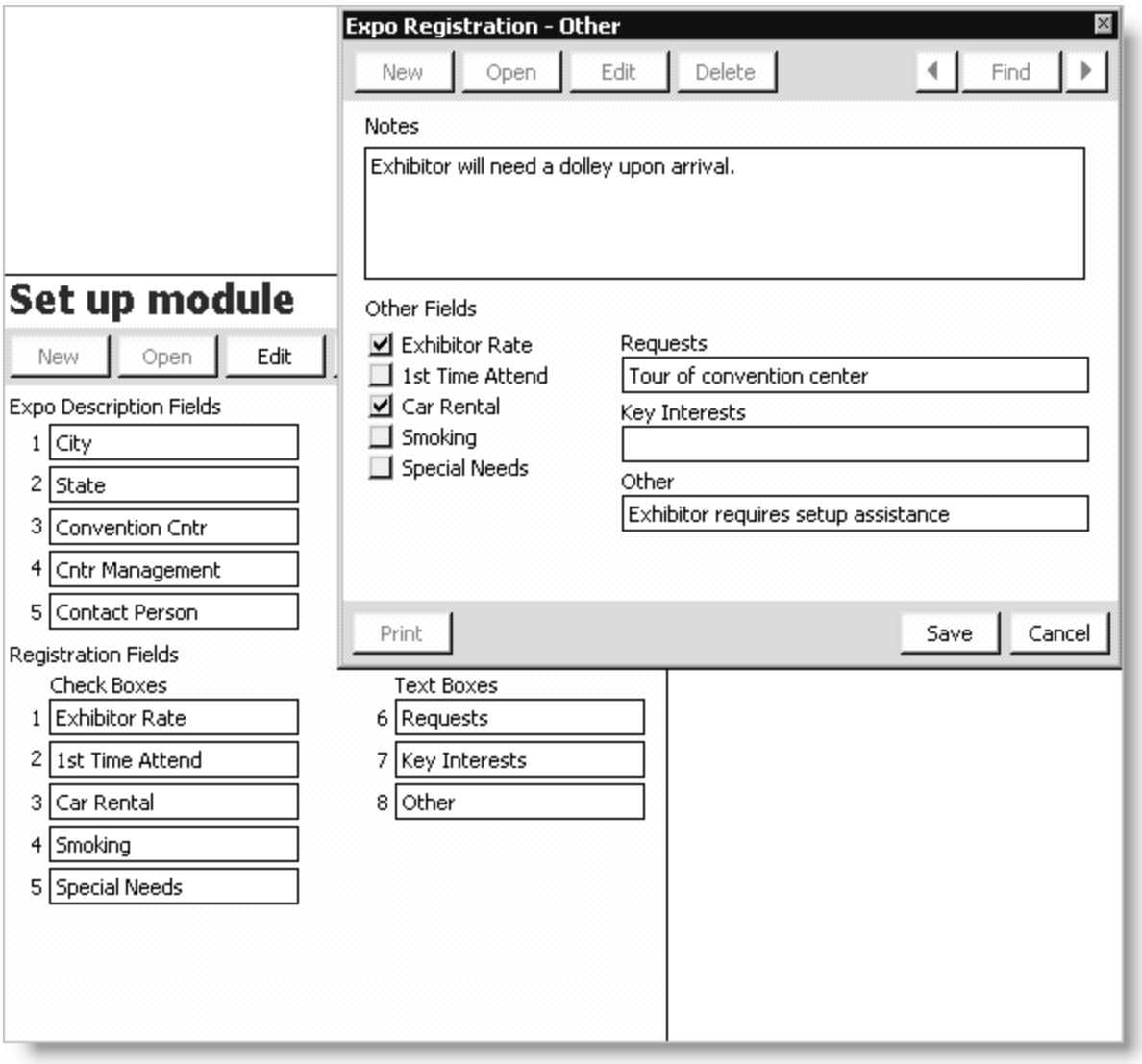
1. From Exposition, select Set up module to open the Set up module window.
2. Click Edit.
3. Enter the Expo Description Fields that you want to display on the Expo Description window.
4. Click Save.



Example of the user-defined Expo Description Fields displayed on the Expo Description window

To create user-defined fields for the Expo Registration - Other window

1. From Exposition, select Set up module to open the Set up module window.
2. Click Edit.
3. Enter the Registration Fields that you want to display on the Expo Registration - Other window. Both checkboxes and text boxes are available.
4. Click Save.

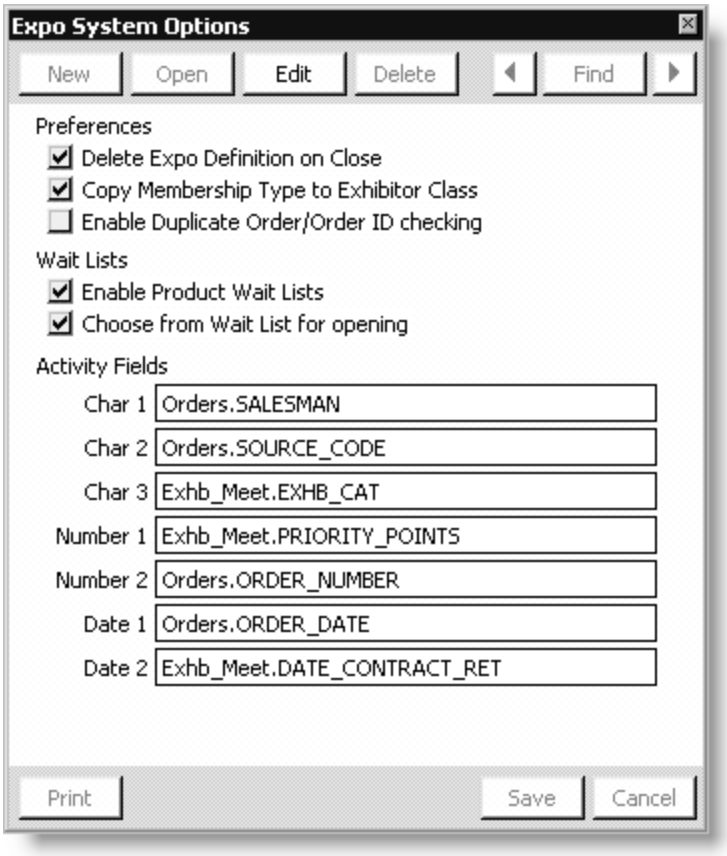


Example of the user-defined Registration Fields displayed on the Expo Registration - Other window

Enabling System Options

Several important options are available on the Expo System Options window for setting up your Exposition Management module. Carefully consider your organization's needs before enabling these options.

Expo System Options window



From Exposition, select Set up module, and click Options

Preferences

Delete Expo Definition on Close - Enable to delete all of an exposition's definition and function records upon closing the exposition.

If you do not enable this option, you can retain the exposition definition and summary records, which you will need when cloning expositions. The exposition is retained on the Set up an exposition window with a status of “C” for closed.

Copy Membership Type to Exhibitor Class - Enable to copy the customer type code directly to the exhibitor class code if you need to assign fees or group exhibitors at the customer-type level. All non-represented types map to the basic Individual Member (M) or Non Member (NM) classes.

You can override any system-assigned class on the Process booth orders window. If you want to use customer types to define your exhibitor classes, you can copy the existing customer types from the Set up customer types window to the Set up exhibitor classes window. For example, if you have a customer type (such as STU) for which you need to assign different product fees, enter that customer type Code on the Set up exhibitor classes window. You can select the customer types that you want to use only by entering matching codes for those types.

Enable Duplicate Order/Order ID checking - Enable to activate duplicate checking for exhibitor orders. When this option is enabled, and a suspected duplicate order is entered (either a Name/ID record or an order record), a window displays for verification of the record.

To verify that the record is a duplicate, double-click the line with the exhibitor's name on the popup window. This cancels the new order. You then can proceed with a new order and ignore the duplicate warning by closing or canceling the duplicate display window.

Wait Lists

The wait list feature allows you to add potential exhibitors to a wait list when an exposition product is sold out (maximum availability is reached). Potential exhibitors are added to wait lists in priority order as they attempt to purchase products (each exhibitor has priority over each succeeding exhibitor added to the list).

When other exhibitors cancel orders (or an exposition product is expanded), iMIS assigns an available exposition product to the first exhibitor on the wait list.

Note: Wait lists are applicable only for exposition products that have an entry in the Max Available field on the Exposition Product Detail window.

Enable Product Wait Lists - Enable to activate the wait list function for all exposition products that have an entry in the Max Available field on the Exposition Product Detail window. When enabled, iMIS assigns an available exposition product to the first exhibitor on the wait list.

Choose from Wait List for opening - Enable to select exhibitors from exposition wait lists when additional exposition products become available (requires enabling the Enable Product Wait Lists option).

Activity Fields

Define the exposition-related data fields (three character, two numeric, and two date) that you want to map to exhibitor activity records when expositions are closed.

By mapping additional fields to exposition activity records, you extend the range of collectable exposition data. Data can come from either individual orders (such as user-defined fields) or from exposition definitions.

To display the mapped data on exhibitor Activity Detail windows, edit the EXPO product type on the Set up activity types window. Enter the UF field labels you want to display on individual activity records (these seven UF fields correspond to the Activity Fields on the Expo System Options window).

To enable system options

1. From Exposition, select Set up module, and click Options to open the Expo System Options window.
2. Click Edit.
3. Enable all applicable options (Preferences and Wait Lists).
4. Define all applicable Activity Fields, and click Save.

To enable wait lists for exposition products

1. Enter a Max Available value on the Exposition Product Detail window for each exposition product that will use wait lists.
2. Enable the Enable Product Wait Lists option on the Expo System Options window.
3. (optional) Enable Choose from Wait List for opening on the Expo System Options window (overrides automatic assignment of exposition products to the first exhibitors on wait lists, and requires selecting exhibitors manually).

To map user-defined fields to Expo activities

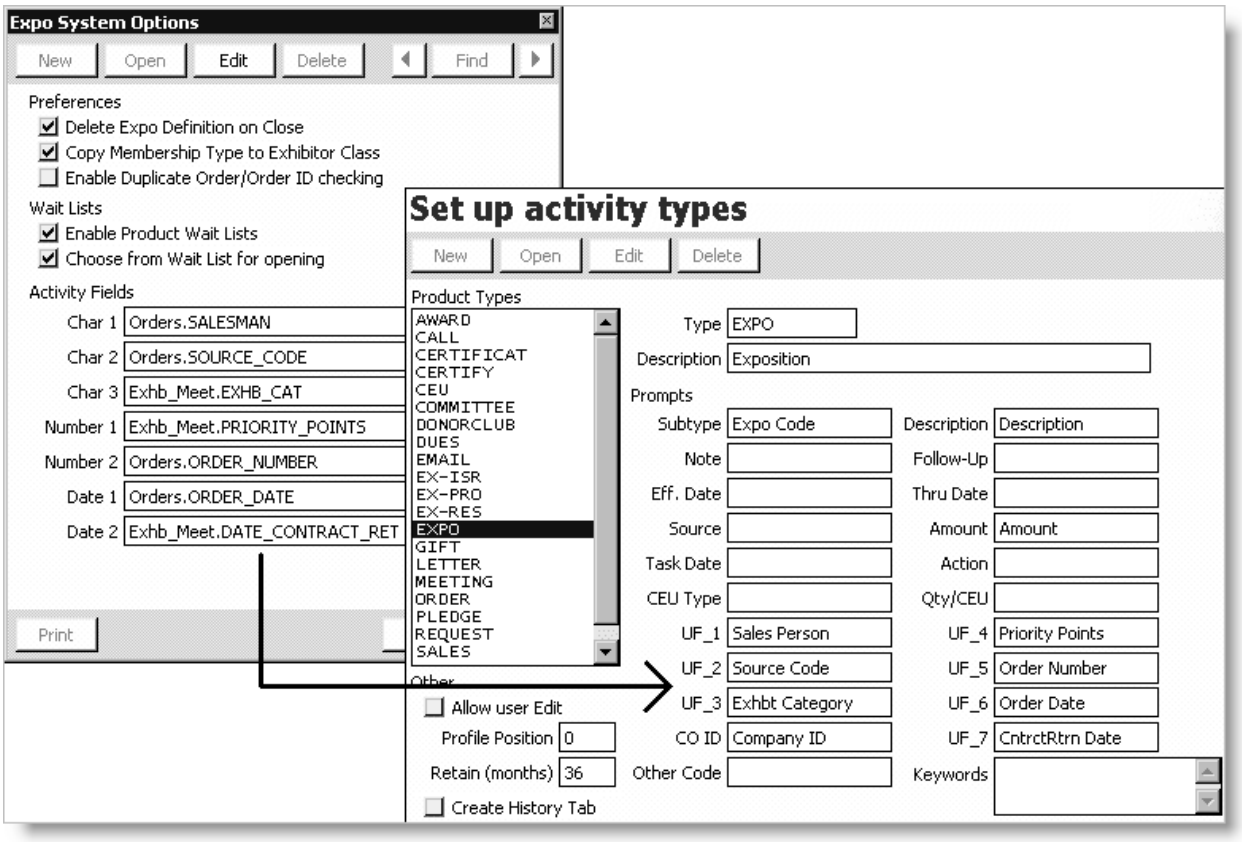
1. Define the Activity Fields on the Expo System Options window (from Exposition, select Set up module, and click Options).

   These fields map to exhibitor activity records when expositions are closed.
2. Enter the UF field labels on the Set up activity types window (from Customers, select Set up module> Activity types).

   The UF fields display on exhibitors' Activity Detail windows and correspond to the Activity Fields on the Expo System Options window:

- UF_1-UF_3 map to Char 1-Char 3
- UF_4-UF_5 map to Number 1-Number 2
- UF_6-UF_7 map to Date 1-Date 2

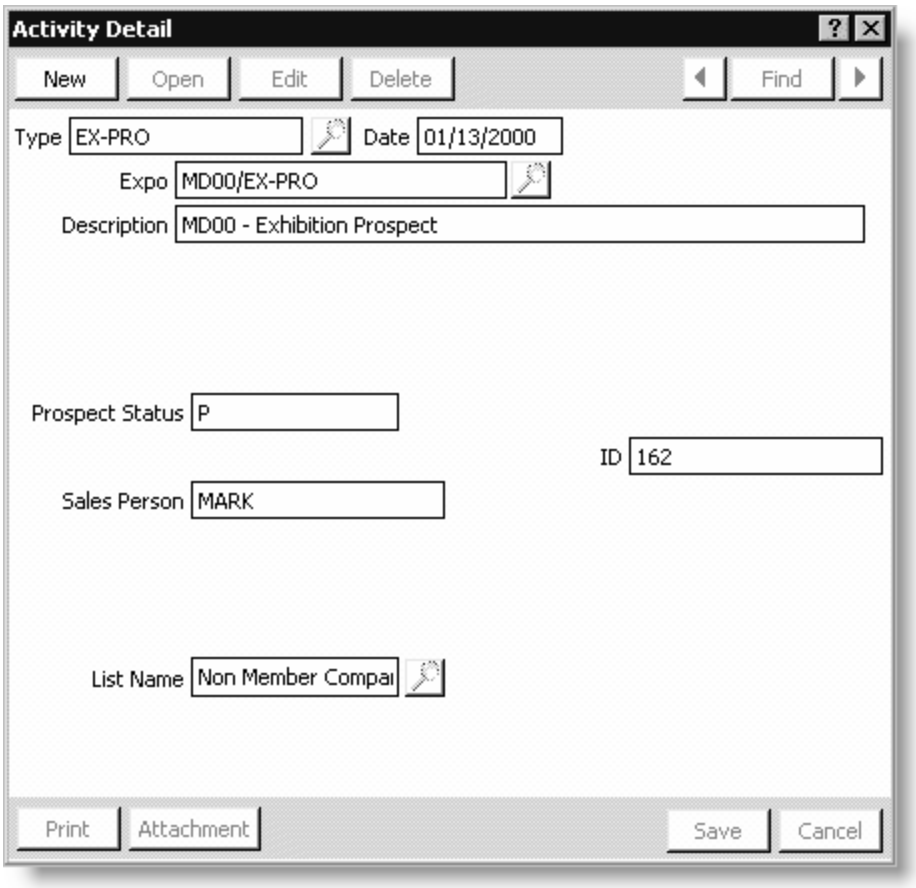
3. View an exhibitor's exposition information on the Activity Detail window after closing the exposition.



Example of the Activity Fields mapped to the EXPO product type

To view an exhibitor's exposition-related activities

1. From Customers, select Manage customers to open the Manage customers window.
2. Open an exhibitor's record.
3. Select the Activities-All tab.
4. Double-click an exposition activity to open the Activity Detail window.



Using default exposition activity types

Exposition Management ships with the following default activity Product Types as defined on the Set up activity types window:

EX-ISR (Expo Initial Size Request)

Activity generated when an exhibitor makes an initial size request for an exposition booth product. By default, no Prompts are enabled:

- Type - Activity product type (EX-ISR)
- Description - Description of activity type (Expo Initial Size Request)

EX-PRO (Exposition Prospect)

Activity generated when a customer becomes a prospect for an exposition. The following Prompts are enabled by default (items in parentheses display on the Activity Detail window):

- Type - Activity product type (EX-PRO)
- Description - Description of activity type (Expo Prospect)
- Subtype - Displays the exposition activity type (Expo)
- Description - Displays the exposition code - exhibition prospect (Description)
- Source - Displays the status of the prospect (Prospect Status):
- P = Prospect
- S = Signed up
- C = Canceled
- D = Declined
- Action - Displays the ID of the prospect (ID)
- CEU Type - Displays the sales person for the prospect (Sales Person)
- Other Code - Displays the list name of the prospect (List Name)

EX-RES (Exposition Reservation)

Activity generated when an exhibitor reserves an exposition product. The following Prompts are enabled by default (items in parentheses display on the Activity Detail window):

- Type - Activity product type (EX-RES)
- Description - Description of activity type (Expo Booth Reservation)
- Subtype - Displays the exposition activity type (Expo)
- Description - Displays the exposition code - exhibition prospect (Description)
- Source - Displays the name of the user who created the booth reservation (User)
- Amount - Displays the total cost of the booths that have been reserved (Amount)
- Qty/CEU - Displays the total number of booths that have been reserved (Quantity)

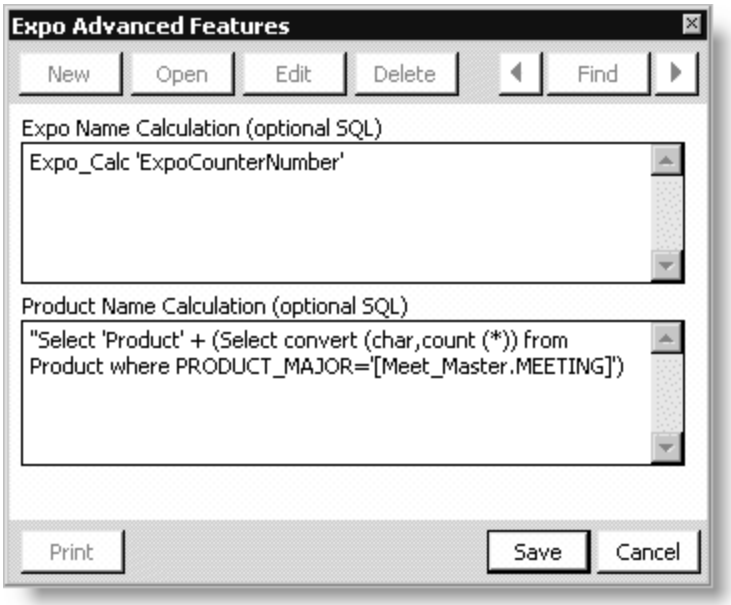
- UF_1 - Displays the total booth width for booths that have been reserved (Booth Width)
- UF_2 - Displays the total booth length for booths that have been reserved (Booth Length)
- Other Code - Displays the Exposition Code/booth Product Code (a new activity is created for each unique Exposition Code and Product Code)

Setting up Advanced Exposition Features

You can set up instructions on the Expo Advanced Features window so that exposition and product codes are automatically assigned or generated according to a formula you choose (as opposed to user-assigned codes).

For example, if you create an auto-generated formula (an appropriate SQL script is entered in the Expo Name Calculation area) when you insert a new exposition or product, a system-assigned code is automatically inserted, rather than iMIS prompting you to enter a user-assigned code.

Expo Advanced Features window



From Exposition, select Set up module, and click Advanced

Expo Name Calculation (optional SQL)

Enter the name of the SQL string used to store the procedure that automatically assigns exposition codes.

Product Name Calculation (optional SQL)

Enter the name of the SQL string used to store the procedure that automatically assigns product codes.

To set up advanced exposition features

1. From Exposition, select Set up module, and click Advanced to open the Expo Advanced Features window.
2. Click Edit.
3. Enter the SQL string that executes the stored procedure in the Expo Name Calculation (optional SQL) and Product Name Calculation (optional SQL) text boxes.
4. Click Save.

Exposition Table Maintenance

Overview of Exposition Tables

Set up tables sub-task list (Exposition)

Exposition has its own tables that must be set up before you can use the module. You access these tables through the Set up tables sub-task list.

Note: From Exposition, select Set up tables.

Product master list

Opens the Set up product master list window for defining and managing exposition products.

Forms master list

Opens the Set up forms master list window for defining and managing exposition forms.

Prospect list

Opens the Set up prospect list window for defining and managing exposition prospect lists.

Sales scripts

Opens the Set up sales scripts window for defining and managing exposition sales scripts. Salespeople use the sales scripts for marketing.

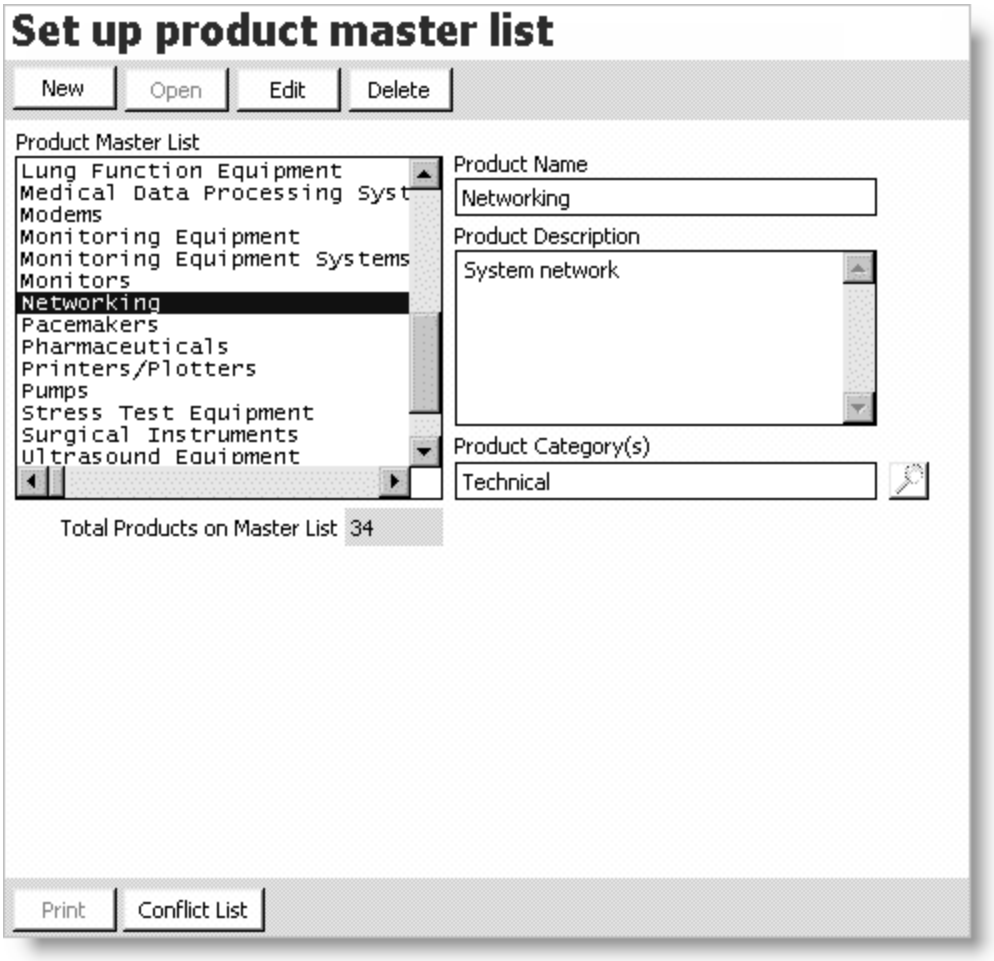
Exhibitor classes

Opens the Set up exhibitor classes window for defining and managing exhibitor classes. Exhibitor classes categorize the exhibitors displayed on the Process booth orders window. You also can create classes (or categories) for all groups that you need to charge different fees or track separately.

Managing Exposition Products

Exposition products are defined on the Set up product master list window.

Set up product master list window



From Exposition, select Set up tables > Product master list

Product Master List

Lists all products available for exhibition at specific expositions.

Product Name

Enter a name for a product being added to the master list.

Product Description

Enter a description of the product.

Product Category

Enter a category for the product (select the Find icon to look up a category). Exposition-product categories are defined on the EXPO_PROD_CAT general lookup/validation table.

Total Products on Master List

Displays the total number of products on the Product Master List.

Conflict List button

Opens the Exhibited Product Conflicts window used for defining and managing lists of conflicting products. See Managing Conflicting Products for more.

To define an exposition product

1. From Exposition, select Set up tables > Product master list to open the Set up product master list window.
2. Click New.
3. Define the product:

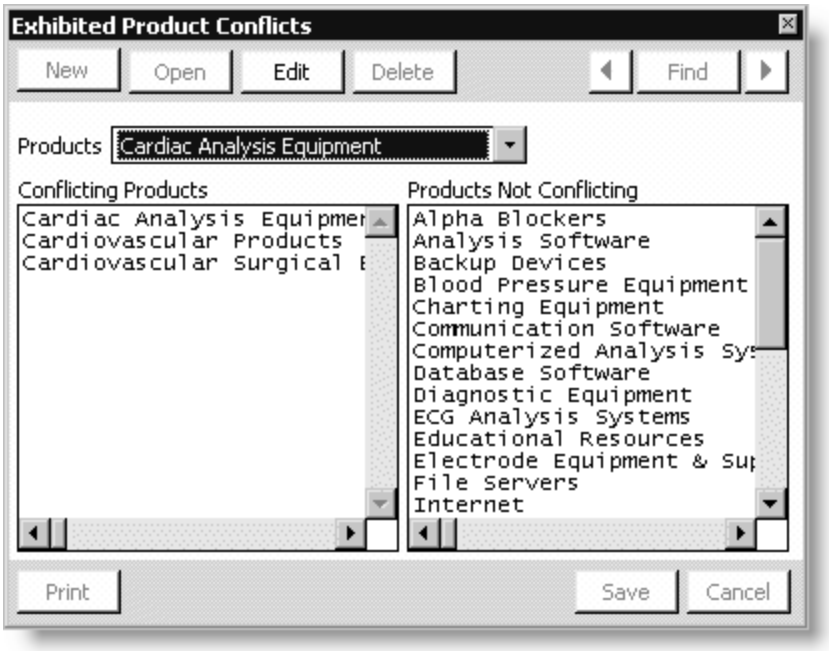
- Enter the Product Name.
- Enter the Product Description.
- Enter the Product Category (select the Find icon to look up a category).

4. Click Save.

Managing Conflicting Products

iMIS Exposition Management allows you to create lists of conflicting products for use when setting up expositions. For example, similar products displayed by competing exhibitors could be considered conflicting products. You might want to identify these conflicting products so that competing exhibitors are not assigned booths in close proximity with one another. (See Managing Proximity Assignments.)

Exhibited Product Conflicts window



From Exposition, select Set up tables > Product master list, and click Conflict List

Products

Select a product for which you want to define a list of conflicting products.

Conflicting Products

Lists a selected product's conflicting products.

Products Not Conflicting

Lists a selected product's non-conflicting products.

To manage conflicting products

1. Open the Exhibited Product Conflicts window:

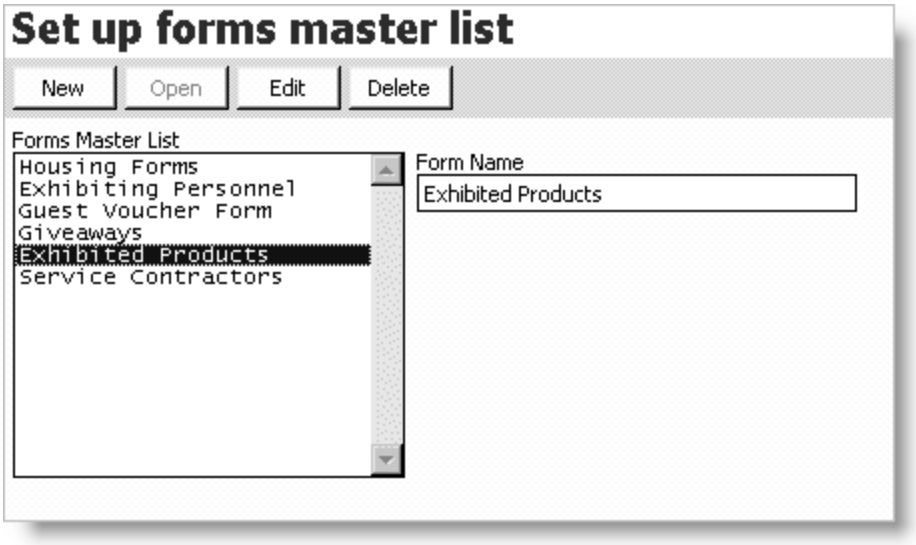
- From Exposition, select Set up tables > Product master list to open the Set up product master list window.
- Click Conflict List.

2. Select a product from the Products list.
3. Click Edit.
4. (optional) To add conflicting products, double-click a product in the Products Not Conflicting list. The product moves to the Conflicting Products list.
5. (optional) To delete conflicting products, double-click a product in the Conflicting Products list. The product moves to the Products Not Conflicting list.
6. Click Save.

Managing Exposition Forms

Managing forms is an important part of any exposition, and the completion and submission of exposition forms is important to exposition staff. Forms might include contracts, service kits, or a form listing electrical needs. Forms are managed on the Set up forms master list window.

Set up forms master list window



From Exposition, select Set up tables > Forms master list

Forms Master List

Lists all available forms.

Form Name

Enter the name of the form you are adding to the Forms Master List.

To add, edit, and delete forms

1. From Exposition, select Set up tables > Forms master list to open the Set up forms master list window.
2. (optional) To add a form, do the following:

- Click New.
- Enter the Form Name.
- Click Save.

3. (optional) To edit a form, do the following:

- Select a form from the Forms Master List.
- Click Edit.
- Edit the Form Name.
- Click Save.

4. (optional) To delete a form, do the following:

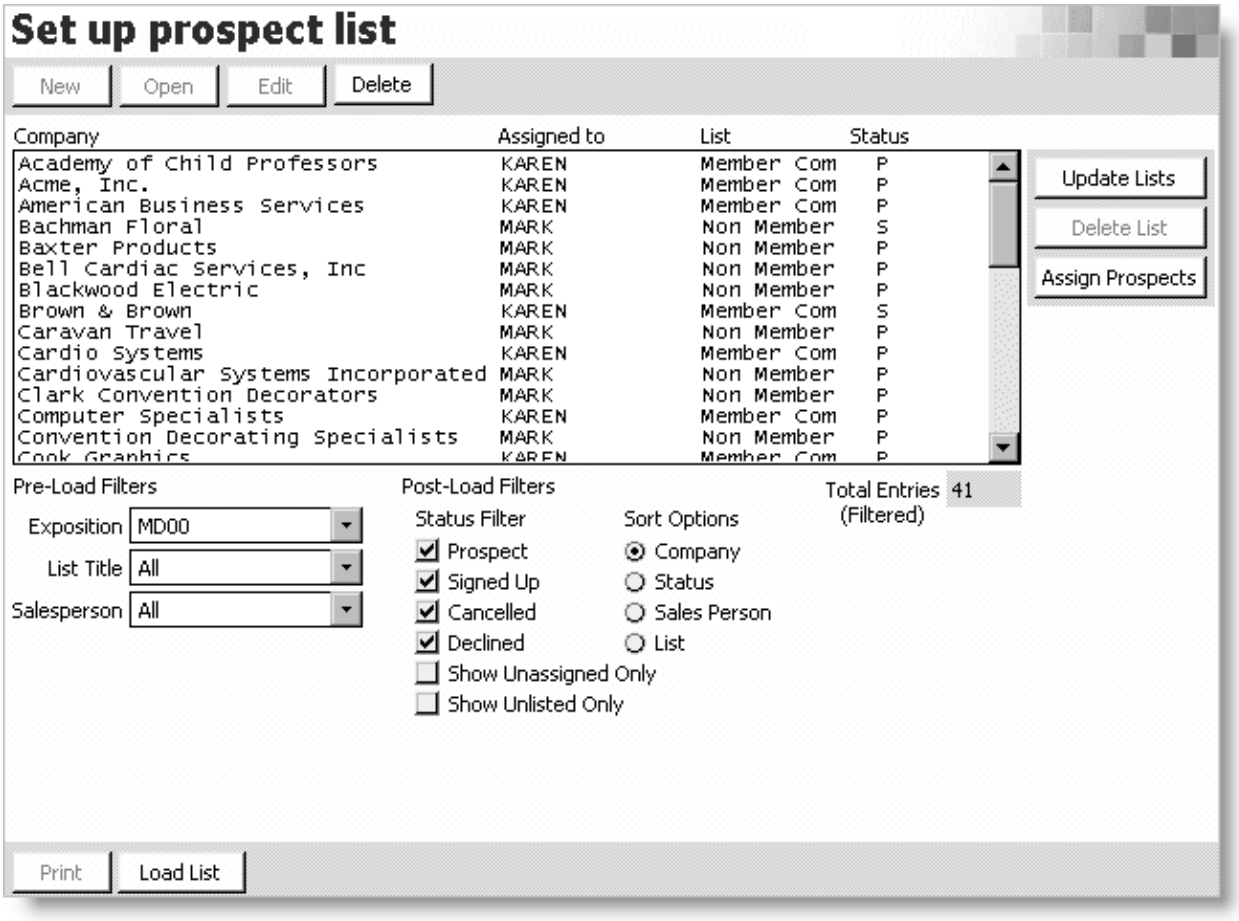
- Select a form from the Forms Master List.
- Click Delete.
- Click Yes to delete the form.

Managing Exposition Prospects

When marketing your expositions, you need to maintain a list of current prospects. This list is based on previous exhibitors as well as other prospects in the customer database. Throughout the marketing process, you can add prospects, import prospect lists, and select records from your customer database.

View, add, delete, update, and create prospect lists through the Set up prospect list window.

Set up prospect list window



From Exposition, select Set up tables > Prospect list

Prospect List

Lists all available prospects by Company name.

Update Lists button

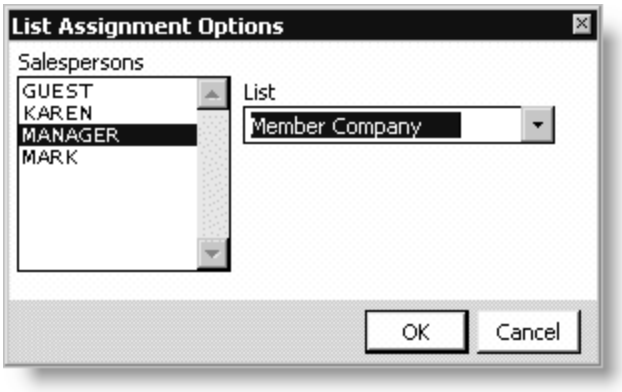
Opens the Update Prospect Lists window for updating prospect lists.

Delete List button

Click to delete a single prospect list (disabled when all prospects are displayed).

Assign Prospects button

Opens the List Assignment Options window used for assigning an exhibitor/prospect to a specific salesperson (enables only when prospects are selected from the Prospect List).



Salespersons - Select a salesperson.

List - Select the list you are assigning to the salesperson.

Pre-Load Filters

Exposition - Select the exposition's associated prospect list.

List Title - Select the customer type of a specific list of prospects (defaults to ALL).

Salesperson - Select the salesperson(s) associated with the list (defaults to ALL).

Post-Load Filters

Status Filter - Separate your list using any combination of the following:

- Prospect - Lists prospective exhibitors. These prospects are individuals who have exhibited at a previous exposition.
- Signed Up - Displays exhibitors who have already signed up for the selected exposition.
- Cancelled - Displays exhibitors who have canceled their order.
- Declined - Displays prospects who have declined to exhibit in the selected exposition.
- Show Unassigned Only - Displays only exhibitors/prospects who are not assigned to a specific salesperson.

- Show Unlisted Only - Displays only those exhibitors/prospects who are not assigned to a specific prospect list.

  Sort Options - Sort your list using any combination of the following:

- Company - Lists exhibitors/prospects alphabetically by company name.
- Status - Lists exhibitors/prospects by status in the following order:
- S = signed up
- P = prospect
- W = wait list
- D = declined
- C = cancelled
- Sales Person - Lists exhibitors/prospects alphabetically by salesperson.
- List - Lists exhibitors/prospects alphabetically by list title.

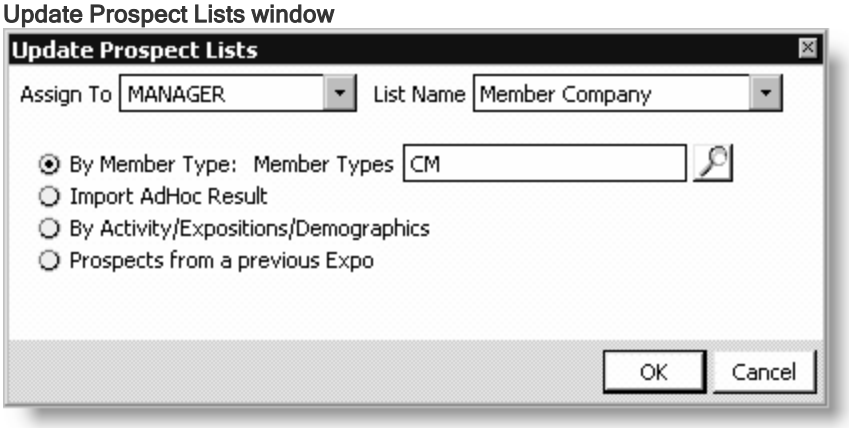
  Total Entries (Filtered)

  Displays the total number of prospects listed.

  Load List

  Click to display the Prospect List on the window.

Update Prospect Lists window



From Exposition, select Set up tables > Prospect list, click Load List, and click Update Lists

Assign To

(optional) Select a salesperson to assign to the selected prospect list. The salesperson is also referred to as the login because iMIS recognizes the salesperson by their login name.

List Name

Select or enter a name that is representative of the prospect list.

By Member Type

Enable to create a prospect list by Member Type.

Member Types - Enter the customer type used to create the list (select the Find icon to select from available customer types). To enter more than one customer type, place a comma (no spaces) between codes (for example, M,NM,CM).

Import AdHoc Result

Enable to create a prospect list using an AdHoc search (opens the Select import file window). Once the search selects the records that meet your criteria, you can import that file as a prospect list.

By Activity/Expositions/ Demographics

Enable to define specific search instructions for creating a new list (opens the Select Search Instructions window).

Prospects from a previous Expo

Enable to select prospects from a previous exposition (opens the Previous Expo window):

- Exhibition - Select from the list.
- Include - Select a status filter:
- Prospect - Lists prospective exhibitors. Prospects are individuals who have exhibited at a previous exposition.
- Signed Up - Displays exhibitors who have already signed up for the selected exposition.
- Cancelled - Displays exhibitors who have canceled their order.
- Declined - Displays prospects who have declined to exhibit in the selected exposition.

To load a prospect list

1. From Exposition, select Set up tables > Prospect list to open the Set up prospect list window.
2. Select the Pre-Load Filters:

- Select an Exposition.
- (optional) Select a List Title.
- (optional) Select a Salesperson.

3. Click Load List to display the list of prospects, and select one or more Post-Load Filters for the prospect list.

To update a prospect list

Before you can create a prospect list, you first must define an exposition for the list.

1. Load a prospect list. See To load a prospect list.

2. Click Update Lists to open the Update Prospect Lists window.
3. (optional) Select a salesperson from the Assign To field.
4. (optional) Enter or select a List Name.
5. Enable an option for updating your prospect list:

- By Member Type
- Import AdHoc Result
- By Activity/Exposition/Demographics
- Prospects from a previous Expo

6. Click OK.

To load a prospect list from a previous Expo

1. Update a prospect list. See To update a prospect list.
2. Enable Prospects from a previous Expo to open the Previous Expo window.
3. Make a selection from the Exhibition list, and enable the status filters you want to Include.
4. Click OK to generate the results of the search.
5. Click Yes to view the results of the search on the Search Results window.
6. Click OK on the Search Results window.
7. Click Yes to add the results of the search to the prospect list.

To delete a prospect list

The Exposition Management module allows you to delete a prospect list. For example, you may have created a short-term list assigned to a particular salesperson that is no longer with your organization, and now you want to delete the records assigned to that individual.

1. From Exposition, select Set up tables > Prospect list to open the Set up prospect list window.

2. Select an Exposition.
3. Select the List Title for the prospects you want to delete.
4. Click Load List to display the prospects.
5. Click Delete List. A warning message displays.
6. Click Yes to delete the list of prospects.

To delete an individual prospect from a list

1. Load a prospect list. See To load a prospect list.
2. Select a prospect from the Prospect List.
3. Click Delete. A message prompt displays.
4. Click Yes to delete the prospect from the list.

To assign prospects to salespeople

Assigning prospects to salespeople is a key feature of the Exposition Management module. Organizations with several salespeople can track and manage their sales activities by assigning prospects and prospect lists to each salesperson.

1. Load a prospect list. See To load a prospect list.
2. Select one or more prospects from the Prospect List (enables the Assign Prospects button).
3. Click Assign Prospects to open the List Assignment Options window.
4. Select from the list of Salespersons (press Shift to assign the prospects to multiple salespeople).
5. Select or enter a List you are assigning to the salesperson(s).
6. Click OK to assign the list. (If assigning prospects to multiple salespeople, a message prompt displays.)

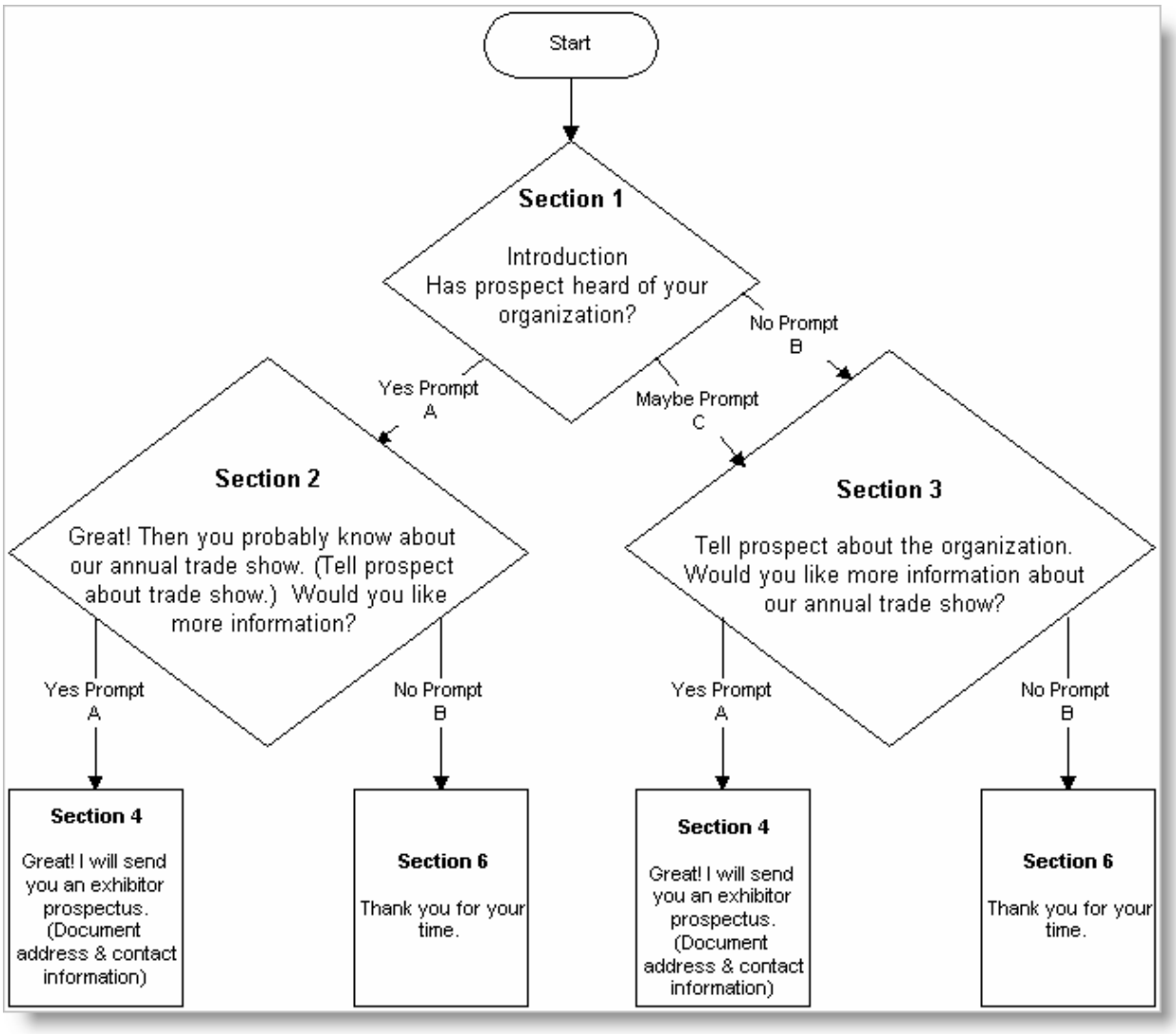
7. (Multiple salespeople only) Click Yes to randomly assign prospects to multiple salespeople.

Managing Sales Scripts

Often several salespeople are involved in selling booths and other products for an exposition. The Exposition Management module allows you to set up a structured sales script that all permanent or temporary sales people can follow. Sales scripts help ensure that the individuals selling booths and other exposition products appear knowledgeable. You also may want to vary the scripts within a single exposition to measure responses or to market to different types of exhibitors.

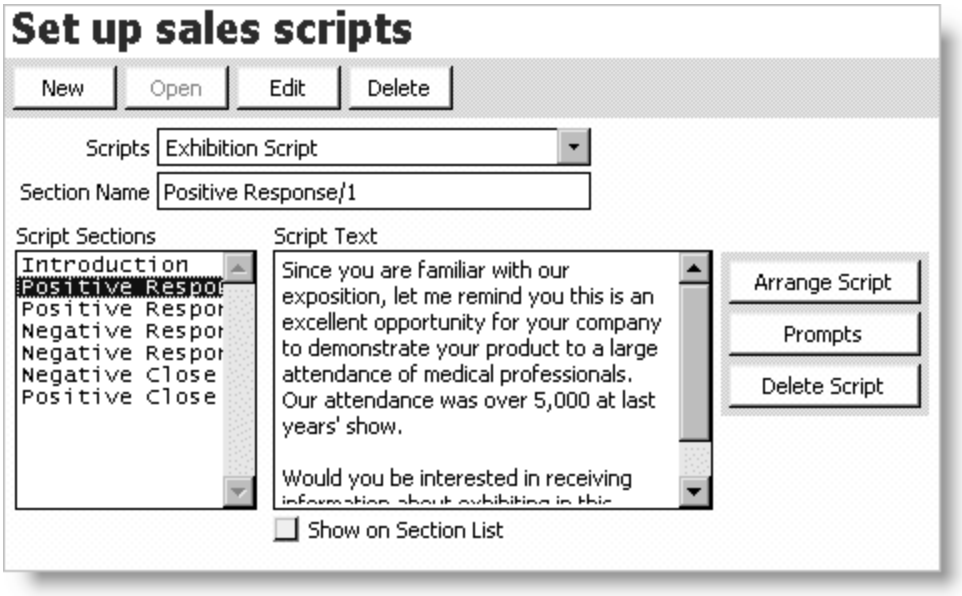
Set up hierarchical scripts on the Set up sales scripts window. You will use the scripts you have entered while in the Expo Sales window. See Using Sales Scripts.

To help you understand how iMIS manages scripts, study the following diagram, which illustrates the hierarchical layout of a prototype script.



Sample prospect script

Set up sales scripts window



From Exposition, select Set up tables > Sales scripts

Scripts

Select a script from the drop-down list.

Section Name

Enter the name of the script section.

Script Sections

Displays all of the script sections.

Script Text

Enter the script content.

Arrange Script button

Opens the Arrange Script Sections window used for arranging a script's logical sequence based upon responses or prompts.

Prompts button

Opens the Section Prompts window used for prompts for script sections.

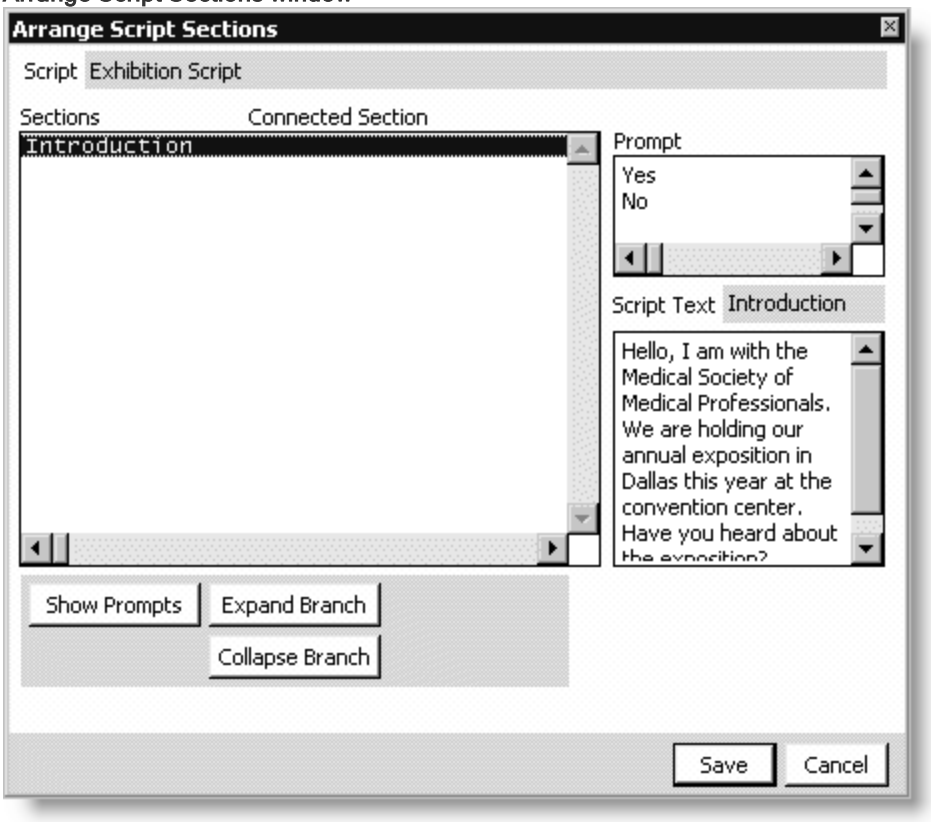
Delete Script button

Click to delete the selected script.

Show on Section List

Enable to display the section name in the Script Sections list.

Arrange Script Sections window



From Exposition, select Set up tables > Sales scripts, select a script, and click Arrange Script

Script

Displays the name of the script.

Sections

Lists the section names of a particular script.

Connected Section

Displays the prompt response that is connected to the listed section (displays only when you click Show Prompts).

Prompt

Displays the response a customer might give after hearing a particular script.

Script Text

Displays the content communicated to customers. This is the script text that is the response to the selected prompt (answer given by the customer) or the initial marketing text.

Show Prompts button

Click to display the Script Section, Prompts, and the Connected Section associated with the script, as well as three additional buttons:

- Connect Section - Opens the Select a Section window where you select script sections to connect to the highlighted prompt.
- Disconnect Sect - Click to break the link between the script section and the prompt. The system removes the information in the Connected Section.
- Show Sections - Click to display Sections, Prompts, and Script Text.

Expand Branch button

Click to display the Script Section with the Connected Section data.

Collapse Branch button

Click to display the Script Section data only.

To create scripts

Before you create a script, write it down on paper first. Break it into logical sections prompted by positive, negative, and maybe responses. This helps you structure your script correctly when entering it.

1. From Exposition, select Set up tables > Set up scripts to open the Set up sales scripts window.
2. Select (New Script) from the Scripts drop-down list. This opens the New Script Name window.
3. Enter a Script Name and click Save to return to the Sales Script Entry window.
4. Click New.
5. Enter a Section Name for the script and Script Text for the section. For example, Section 1 might be your introductory comments in which you state the name of your organization and end with a question, such as "Are you familiar with our organization?"
6. Click Save.
7. Repeat this process for each section you create. Each section is based upon a response or "prompt" to the previous section.
8. Create section prompts after creating all of your sections:

- Select a script section.
- Click Prompts to open the Section Prompts window.
- Connect the prompts for the selected section.
- Repeat this step for each prompt that you create.
- Click Save.

To arrange scripts

Now that you have created the sections and prompts for your script, you are ready to arrange the script.

1. From Exposition, select Set up tables > Set up scripts to open the Set up sales scripts window.

2. Select Introduction under Script Sections.
3. Click Arrange Script to open the Arrange Script Sections window. In this window, you see the Introduction section and associated prompts and text.
4. Click Show Prompts to see the prompts connected to the Introduction section.
5. Select a prompt, and click Connect Section to open the Select a Section window.
6. Select the section on the Select a Section window that you want to connect to the highlighted prompt. For the Yes prompt, select Positive Response/1. For the No prompt, select Negative Response/1.
7. Click OK.
8. Click Save. At this point, you have assigned scripts for both a positive (Yes) and negative (No) response to the Introduction script. The following steps will allow you to continue to assign scripts based on additional questions and answers:
9. From the Set up sales script window, (Introduction is still highlighted) click Arrange Script to reopen the Arrange Script Sections window.
10. Click Expand Branch.
11. Select Positive Response/1.
12. Click Show Prompts. The Yes prompt is highlighted.
13. Click Connect Section.
14. Select Positive Response/2, and click OK.
15. Click Save. Repeat the process until the script sequence is complete.

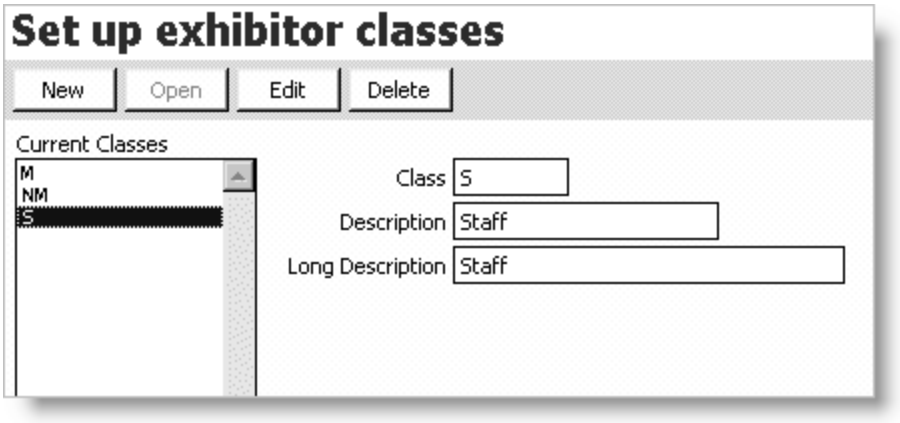
Managing Exhibitor Classes

The Set up exhibitor classes window allows you to define which classes appear as options for categorizing exhibitors and registrants on the Process booth orders window. Create categories for all groups for which you charge different fees, print badges, or print reports.

There are three scenarios for defining your exhibitor classes:

- Let the exhibitor classes default to Member or Non-Member. Using this scenario, all exhibitors are either a member or non-member based upon their customer record.
- Map member types to exhibitor classes. Using this scenario, you may or may not want to map all member types. For example, you may want to map only Member, Non-Member, and Company Member.
- Define your own exhibitor classes without taking member types into consideration. Using this scenario, you have to override the Member/Non-Member status at order entry and enter the appropriate exhibitor class.

Set up exhibitor classes window



From Exposition, select Set up tables > Exhibitor classes

Current Classes

Displays the exhibitor class codes used by all expositions.

Class

Enter a code for the class name.

Description

Enter a short description of the class.

Long Description

Enter a detailed description of the class.

To define exhibitor classes

1. From Exposition, select Set up tables > Exhibitor classes to open the Set up exhibitor classes window.
2. Click New.
3. Enter a Class.
4. Enter a Description.
5. Enter a Long Description.
6. Click Save.

Note: If you define classes that do not map to customer types, override the M or NM that displays in the Class field on the Process booth orders window.

To map a customer type to an exhibitor class

1. Enter the customer type on both the Set up customer types and Set up exhibitor classes windows. If you do not enter this in both places, the new customer type does not show up on the Exposition Booth & Product Fees window.
2. Enable the Copy Membership Type to Exhibitor Class option (this class maps to the basic M = Member or NM = Non Member classes).

Creating General Lookup/Validation Tables for Exposition Management

You must set up four general lookup/validation tables for the Exposition Management module.

BADGE_TYPE

This table includes the badge types needed for your expositions. The Exposition Management module comes with two badge types predefined: Free_Pass and Paid_Pass. Free passes come with the purchase of the booth. For example, when setting up your exposition, if you indicate that each booth unit receives two free passes, that is the number of free passes available to the exhibitor for each booth unit.

A Paid_Pass is a specific product defined at the exposition product level. For example, exhibitors may want to purchase additional badges with their booth order. The BADGE_TYPE information is available on the Badges window, which you gain access to from the Process booth orders window.

As you issue each badge, you can see the number available for each Paid and Free Pass type displayed below the data entry area. Badge types are only available on the Badges window if they have been defined on the Set up general lookup/validation window. Although the Exposition Management module comes with Free_Pass and Paid_Pass already defined, you can define as many badge types as you need for your particular exposition.

CONTACT_TYPE

This table contains the contact types for the exhibiting company. The Exposition Management module comes with Primary contact defined, although you may want to define several contact types for the companies exhibiting at your exposition, such as accounts payable, sales, and so forth.

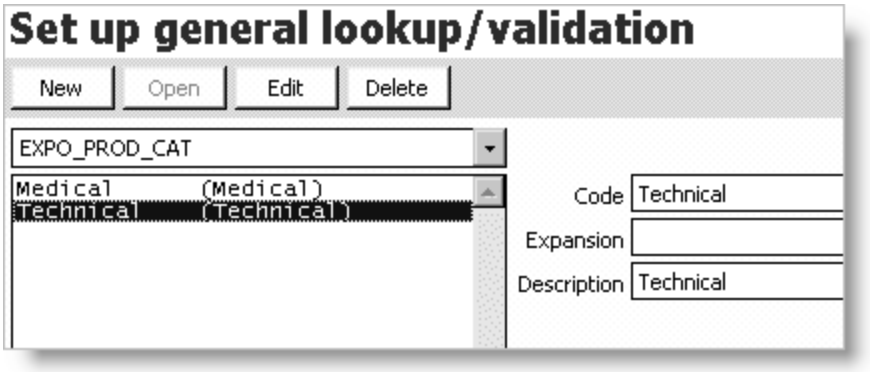
EXPO_CAT

This table contains the historical category types of expositions. You can define the category types depending upon the types of expositions you conduct. For example, you might hold several different types of expositions, such as technology conferences, educational shows, and so forth.

EXPO_PROD_CAT

This table allows you to define categories for grouping the products you enter in the Product Master File. For example, you might group your products based upon the types of expositions you hold, such as technology products for the technology conference, or educational products for an educational show, and so forth. You can define the category types depending upon the types of expositions you conduct. Even if you hold only one category of exposition, you still might have several product categories you want to define.

Tables window



From Customers, select Set up tables > General lookup/validation

Code

Enter an abbreviation for the table (can be 60 characters long).

Expansion

(Does not apply for Exposition Management) Allows you to expand the character length for the code.

Description

Enter detailed information about the table type.

Import button

Opens the Importing Tab-Delimited Table window, where you can import tables from tab-delimited files.

To create general lookup/validation tables for Exposition Management

1. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Scroll down the list and select (New Table). A data entry window opens.
3. Enter the New Table Type in the pop-up window.
4. Click Save to return to the Set up general lookup/validation window.
5. Click New.

6. Enter a Code for the new table type.
7. (optional) Enter a brief Description of the table type.
8. Click Save.

Exposition Definition

Overview of exposition definition

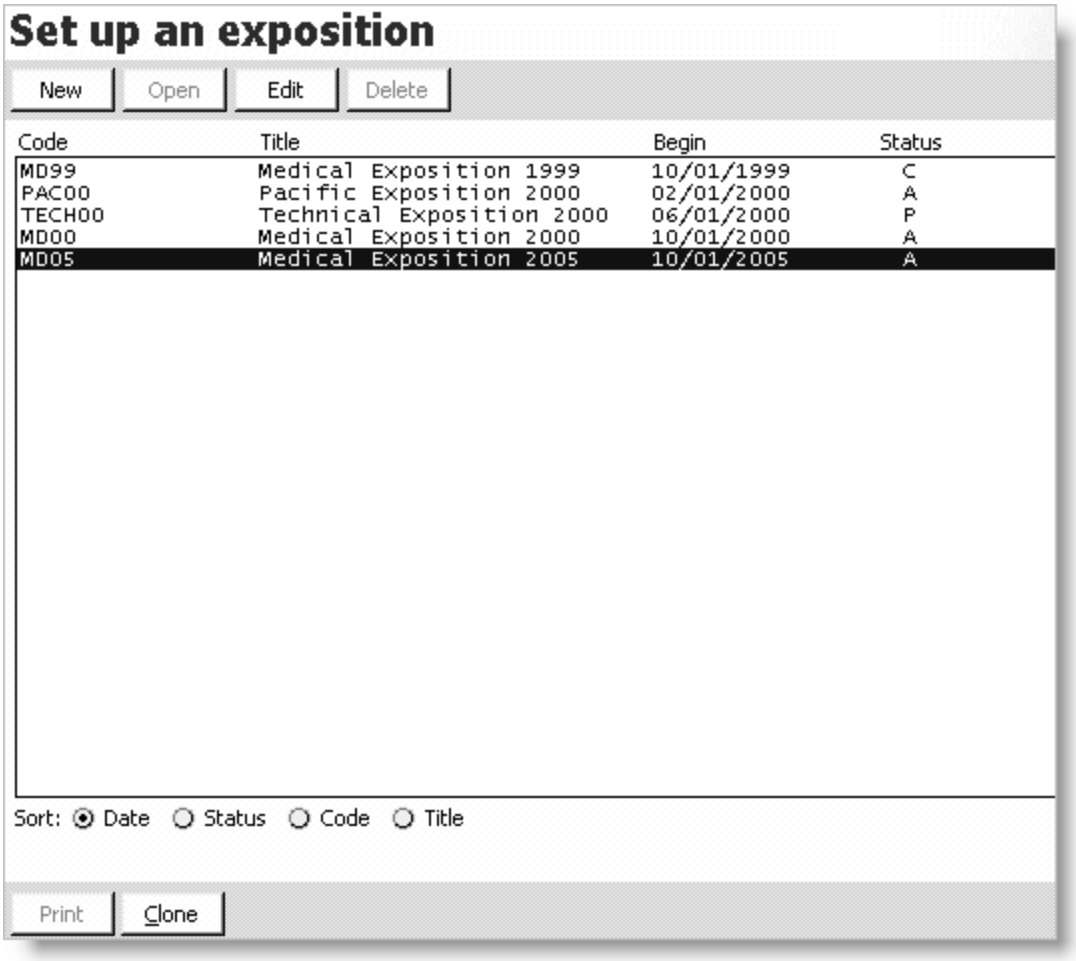
Defining an exposition involves entering basic exposition information (such as description and location) as well as defining service contractors and forms that are required for the exposition.

Managing an exposition entails adding, modifying, and deleting predefined information.

Viewing Available Expositions

You can view defined expositions and their status through the Set up an exposition window.

Set up an exposition window



From Exposition, select Set up an exposition

Code

Displays the exposition code.

Title

Displays the exposition title.

Begin

Displays the exposition's start date.

Status

Displays the exposition's status:

- P = Pending (default, still in the planning stages)
- F = Frozen (currently locked from order)
- C = Closed (orders no longer accepted)
- X = Canceled

Sort

Enable the appropriate options for sorting the listed expositions.

Clone button

Click to create a copy of the selected exposition.

To view and sort the list of expositions

1. From Exposition, select Set up an exposition to open the Set up an exposition window.
2. Sort the list by enabling the appropriate Sort option:

- Date organizes the expositions chronologically by start date.
- Status organizes the expositions alphabetically by status code, displaying all open, active expositions (with A = Active status codes) first, followed by the closed, pending, and canceled expositions.
- Code organizes the expositions alphabetically by exposition code.
- Title organizes the expositions alphabetically by exposition title.

See these related topics:

- To clone an exposition (how to create a new exposition by copying an existing exposition)
- To define an exposition
- To modify an exposition

Cloning an Exposition

Cloning allows you to copy an existing exposition rather than create a new exposition. Cloning is useful when you need to set up expositions that are identical except for the dates and times. When you clone an exposition, the exposition definition, product definitions, and sales scripts are copied from the cloned exposition to the new exposition.

To clone an exposition

1. From Exposition, select Set up an exposition to open the Set up an exposition window.
2. Select the exposition you want to clone.
3. Click Clone to open the Specify a new Expo Code window.
4. Enter the new exposition code for the cloned exposition.
5. Click Save.
6. Double-click the new exposition on the Set up an exposition window to open a second instance of the Set up an exposition window.
7. Click Edit, and make any necessary changes to the exposition dates, times, and details.
8. Click Save.

Defining an Exposition

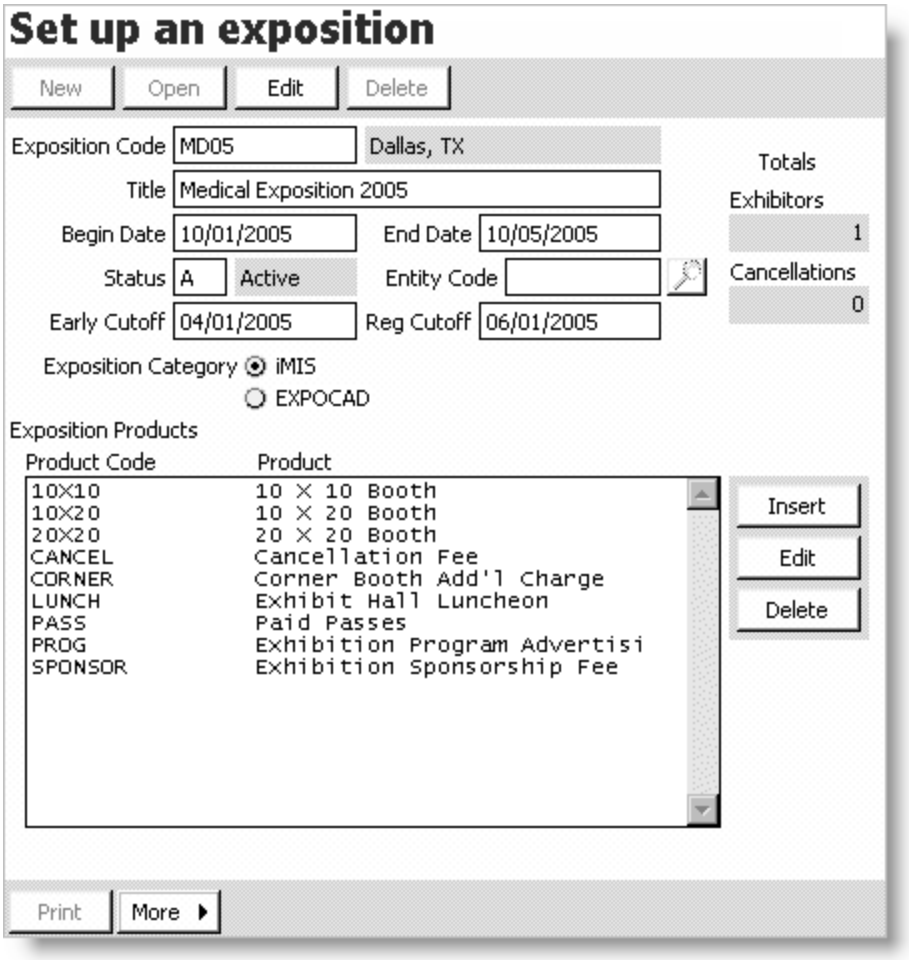
This section explains how to define an exposition and edit exposition information using the Set up an exposition window. Additional exposition setup options are discussed later in this chapter.

Defining an exposition involves the following:

- Entering the exposition dates
- Selecting global default options
- Identifying service contractors
- Establishing form tracking
- Entering descriptions, address, and notes

Note: For detailed instructions on adding booths to a proximity area, see Managing Proximity Assignments.

Set up an exposition window (second instance)



From Exposition, select Set up an exposition, and double-click an exposition

Exposition Code

Enter a unique, abbreviated code that represents the exposition. Do not use spaces or special characters (such as “or”). The code can be any combination of letters and numbers as long as the code is different from that of other expositions being maintained in iMIS.

Title

Enter the name of the exposition you are defining. This title appears on windows and reports generated for this exposition.

Begin Date

Enter the start date of the exposition. The Begin Date determines the accounting method in which deferred income is transferred to current income for this exposition.

End Date

Enter the date the exposition ends.

Status

Enter the status of the exposition:

- A = Active
- P = Pending (still in planning stage)
- F = Frozen (currently locked from active order, due to events, such as on-site orders after an exposition has already started)
- C = Closed (orders no longer accepted)
- X = Canceled

Note: An exposition must have a pending (P) status to use the Booth Preferences Management feature.

Entity Code

Enter the entity assigned to the exposition income account if using the non-default exposition entity (a blank field uses the default). Select the Find icon to look up an entity.

The Entity Code field displays only if you enable multiple entities on the AR/Cash Set up module window (where you also can change the default entity). For detailed information on processing multiple entities and assigning entity codes, see Learning and Using iMIS Accounts Receivable and Cash Receipts.

Early Cutoff

Enter the last calendar date a discounted rate can be applied for early orders.

Reg Cutoff

Enter the last calendar date the regular rate can be applied. If regular and late fees are set up as part of the exposition definition, any orders after the regular cutoff date are automatically charged the late fee. If you do not charge a higher fee for late orders, leave this field blank.

Totals

Exhibitors - Displays the total number of exhibitors.

Cancellations - Displays the total number of cancellations.

Exposition Category

Enable the applicable category.

Tax Authority

(Canadian tax only) Enter the tax code used for the exposition. Select the Find icon to look up the current tax codes defined on the Set up tax codes window (from AR/Cash, select Set up tables > Tax codes).

The Tax Authority field displays only if the Canadian Taxation Method is enabled on the Organization Names window (File> System Setup, click Organization Names).

Exposition Products

Displays the products defined for the exposition on the Exposition Product Detail window.

Insert button

Opens the Exposition Product Detail window used for defining exposition products.

More button

Click to display a menu of additional exposition set up options:

- General - Opens the Expo General Setup window used for setting default options.
- Options - Opens the Expo Options window used for enabling prospect list security, product and company conflict checking, and booth preferences.
- EXPOCAD Product Mapping - Applicable only for EXPOCAD.
- Service Contractors - Opens the Service Contractor Maintenance window where you enter service contractor information. You can designate official contractors and the function the contractor is performing for the exposition.
- Form Tracking - Opens the Expo Forms window where you define the forms required for the exposition and assign due dates for the forms.
- Roster - Opens the Expo Roster window, which displays a list of exhibitors registered to attend the exposition.
- Booth Proximity - Opens the Proximity Assignment window where you create special areas within the exposition and assign selected booths to these special areas. These areas are used to determine product conflicts.
- Description - Opens the Expo Description window where you enter a text description of the exposition. A maximum of 1,000 alphanumeric characters can be entered. This window also displays user-defined fields created on the Set up module window.
- Address - Opens the Expo Address window where you enter the exposition address.
- Notes - Opens the Expo Notes window where you enter additional exposition information, as well as a SQL Registration Verification calculation.
- Close Current Expo - Closes the exposition, deletes exposition details, creates activity records, and changes exposition status to C = Closed.
  Choosing this option also deletes the exposition definition, depending on the preferences enabled on the Expo System Options window.
- Cancel Current Expo - Changes the exposition status to X = Canceled and deletes order information. Also, it may delete the exposition definition, depending on the preferences enabled on the Expo System Options window.

To define an exposition

Enter the basic information that defines the exposition in the main definition fields.

1. From Exposition, select Set up an exposition to open the Set up an exposition window.
2. Click New to open a second instance of the Set up an exposition window.
3. Enter an Exposition Code.

   Note: You can automate what appears in the Exposition Code field of the Set up an exposition window by entering a SQL calculation in the Expo Name Calculation field of the Expo Advanced Features window. See Setting up Advanced Exposition Features.
4. Enter all other applicable exposition information.
5. Click Save.

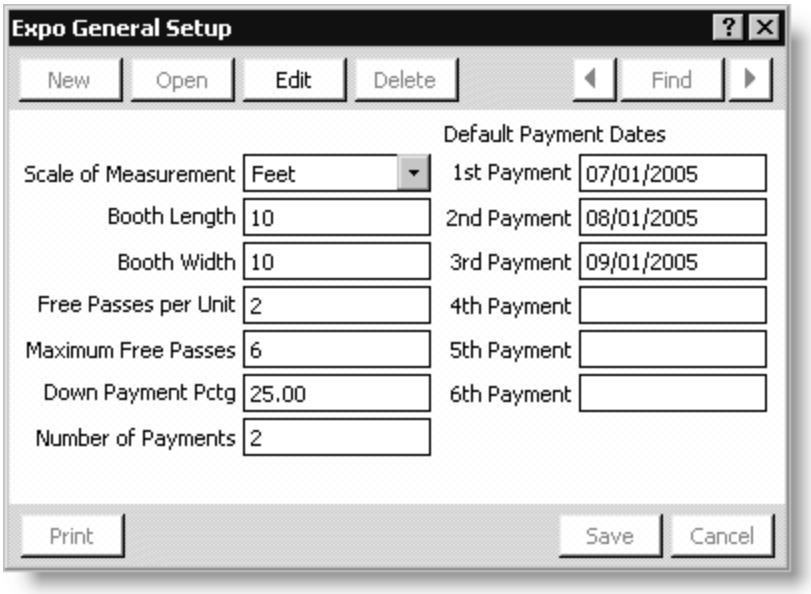
To modify an exposition

1. From Exposition, select Set up an exposition to open the Set up an exposition window.
2. Double-click the exposition you want to modify. The exposition displays on the second instance of the Set up an exposition window.
3. Click Edit.
4. Make any necessary changes.
5. Click Save.

Defining General Exposition Options

Use the Expo General Setup window to define the general options for the exposition, including default booth measurements, number of free passes per booth, down payment percentage, and remaining payment dates.

Expo General Setup window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select General

Scale of Measurement

Select the unit of measure: Feet or Meters.

Booth Length

Enter the default booth length for the exposition booth products.

Booth Width

Enter the default booth width for the exposition booth products.

Free Passes per Unit

Enter the number of free passes designated for each booth (unit).

Maximum Free Passes

Enter the maximum number of free passes regardless of booth units ordered. The maximum number of free passes should be equal to or greater than the number of passes entered in the Free Passes per Unit field. Passes do not display on the Badges window if zero is entered as the maximum.

Down Payment Pctg

Enter the default down-payment percentage that appears on the Payment Schedule window. This is informational only and does not interface with AR/Cash.

Number of Payments

Enter the default number of payments that appears on the Payment Schedule window. This is informational only and does not interface with AR/Cash.

Default Payment Dates

Enter the default dates for the payment schedule of the exposition. This is informational only and does not interface with AR/Cash.

To define general exposition options

1. Open the Expo General Setup window:

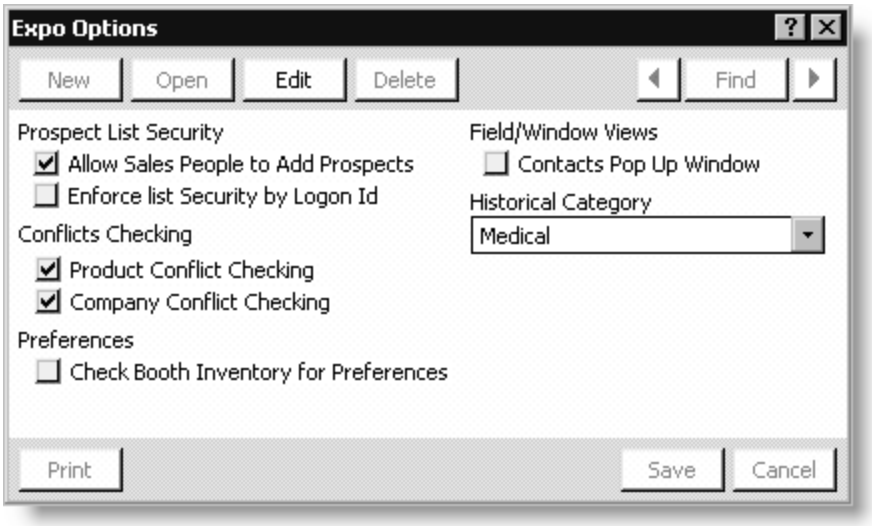
- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select General.

2. Click Edit.
3. Enter the setup information.
4. Click Save.

Defining Exposition Options

Use the Expo Options window to enable system features such as enabling iMIS to check for product and company conflicts.

Expo Options window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Options

Prospect List Security

Allow Sales People to Add Prospects - Enables Add New Prospect on the Manage prospect lists window, allowing salespeople to add prospects to the prospect list.

Enforce list Security by Logon Id - Enable so that iMIS verifies system security by logon identification. Prospect lists will display prospects assigned to the login ID only. List filters will display filters for the login ID only.

Conflicts Checking

Product Conflict Checking - Enable to enforce product-conflict checking when you process an order. Exhibitor product and proximity data must be set up for product conflict checking to function.

Company Conflict Checking - Enable to enforce company-conflict checking when you process an order.

Preferences

Check Booth Inventory for Preferences - Enable so that iMIS verifies whether the booth product exists and inventory is available before assigning a preference.

Field/Window Views

Contacts Pop Up Window - Enable so that the Contacts List window is available from the Exhibitor Information window.

Historical Category

Select the historical category you want to assign to the exposition. The categories that display are set up on the EXPO_CAT general lookup/validation table.

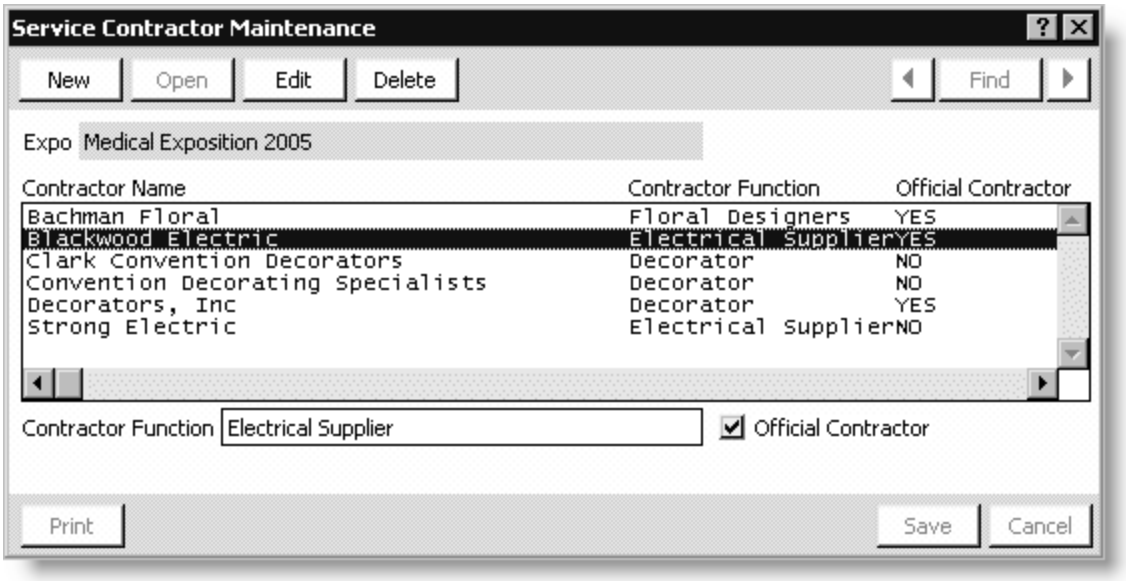
To define exposition options

1. Open the Expo Options window:
   - From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
   - Click More and select Options.
2. Click Edit.
3. Enable all applicable options.
4. Click Save.

Managing Service Contractors

Use the Service Contractor Maintenance window to manage exposition contractors and contractor functions.

Service Contractor Maintenance window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Service Contractors

Expo

Displays the name of the exposition.

Service Contractor List

Lists all of the contractors servicing the exposition.

Contractor Function

Enter the contractor's service type.

Official Contractor

Enable if the contractor is an official exposition contractor.

To add service contractors to an exposition

To add a service contractor to an exposition, the contractor must have a record in the customer database.

1. Open the Service Contractor Maintenance window:

- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select Service Contractors.

2. Click New to open the Find window. Search for a contractor.
3. Double-click a record. The company name associated with the record automatically displays in the Service Contractors List.
4. Enter the Contractor Function that best describes the contractor. A maximum of 30 alphanumeric characters can be entered.
5. (optional) Enable the Official Contractor option if the contractor is designated as an official contractor for the exposition.
6. Click Save.

To edit or delete a service contractor

1. Open the Service Contractor Maintenance window:

- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More, and select Service Contractors.

2. Select a contractor from the Service Contractor List.
3. (optional) To edit a service contractor, do the following:

- Click Edit, and make any necessary changes.
- Click Save.

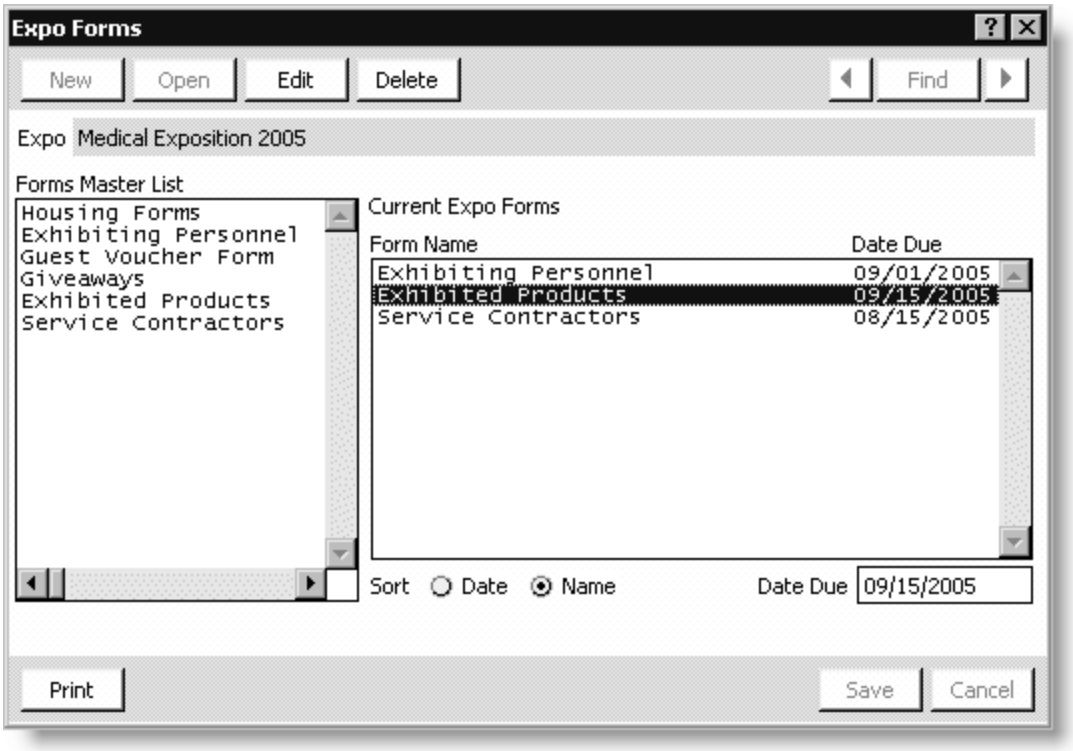
4. (optional) To delete a service contractor, do the following:

- Click Delete. A message prompts you to verify deleting the contractor.
- Click Yes to delete the service contractor from the list.

Managing Exposition Forms

Use the Expo Forms window to add forms (defined on the Set up forms master list window) to an exposition. Most expositions require that all forms be signed and returned prior to the exposition Begin Date.

Expo Forms window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Form Tracking

Expo

Displays the name of the exposition.

Forms Master List

Displays the list of available forms. Forms are defined on the Set up forms master list window.

Current Expo Forms

Displays the forms assigned to the exposition.

Sort

Enable a sort option for displaying the list of Current Expo Forms.

Date Due

Enter a final submission date for a form.

To add forms to an exposition

1. Open the Expo Forms window:

- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select Form Tracking.

2. Select a form from the Forms Master List, and click New to add the form to the list of Current Expo Forms.
3. Enter the Due Date for the form.
4. Click Save.

To edit or delete exposition forms

1. Open the Expo Forms window:

- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select Form Tracking.

2. Select the form from the Current Expo Forms list that you want to edit or delete.
3. (optional) To edit a form, do the following:

- Click Edit.
- Change the Date Due.
- Click Save.

4. (optional) To delete a form, do the following:

- Click Delete. A message prompts you to verify deleting the form.
- Click Yes to delete the form from the exposition.

Managing Proximity Assignments

Booth proximity is the relative closeness of one booth to another within a specific area on the exposition floor. Using the Proximity Assignments window, you can assign booths to specific areas on the exposition floor.

For example, if you do not want vendors with competitive products to be within five booths of each other, then define your proximity assignments so that these vendors are not near one another.

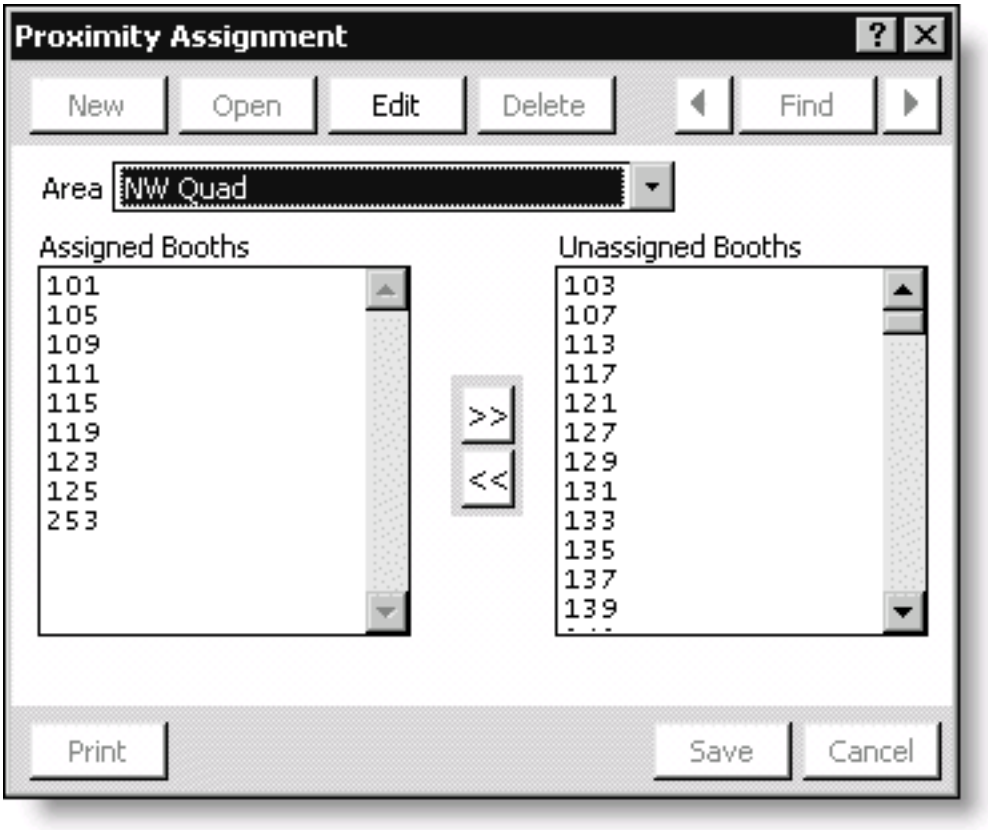
Note: When you define proximity assignments, you must assign at least one booth to an exposition area.

You also can use proximity assignments to group certain types of vendors. For example, you may define an area specifically for research companies.

This section address the following topics:

- Defining (creating) a booth proximity
- Adding booths to a proximity
- Removing a booth from a proximity

Proximity Assignment window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Booth Proximity

Area

Select a booth-proximity area. When naming an Area, provide a name that relates to something on the exposition floor (limit 38 alphanumeric characters). For example, if the booth area is near the food court, name the proximity area Food Court.

Assigned Booths

Lists the booths assigned to the Area (proximity).

Unassigned Booths

Lists the booths available for assignment to the Area (proximity).

To define a proximity area

1. Open the Proximity Assignment window:

- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select Booth Proximity.

2. Click Edit.
3. Select New Area from the Area list. The Add New Area window opens.
4. Enter the new Area Name.
5. Click OK to return to the Proximity Assignment window and add booths to the new area.

To modify booth proximity assignments

1. Open the Proximity Assignment window:

- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select Booth Proximity.

2. Select the Area you want to modify.
3. Click Edit.
4. (optional) To assign booths to an area, do the following:

- Select the booths from the Unassigned Booths list that you want to assign to the area. Press Ctrl to select multiple booths.
- Click << to assign the booths to the area. The selected booths display in the list of Assigned Booths.

5. To remove booths from an area, do the following:

- Select the booths from the Assigned Booths list that you want to remove from the area. Press Ctrl to select multiple booths.

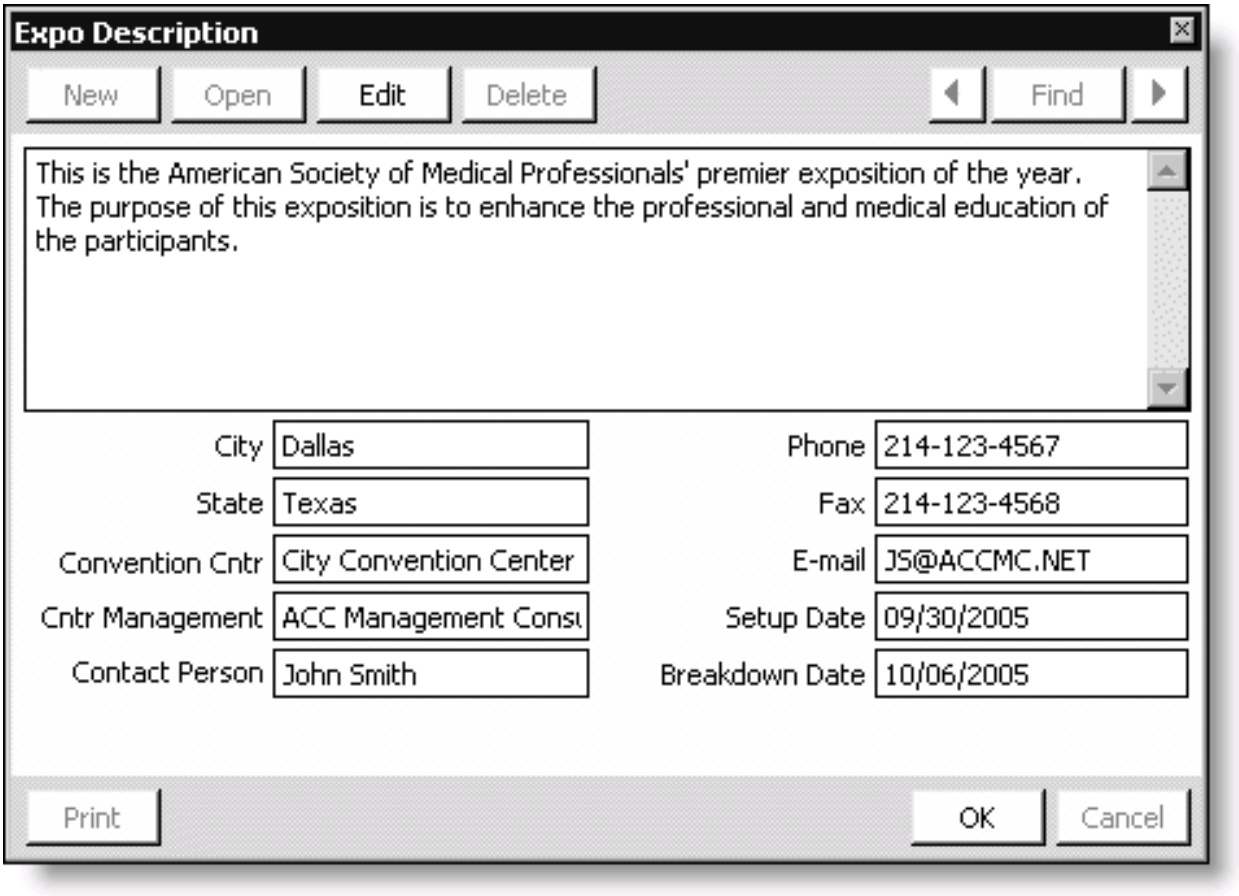
- Click >> to remove the booths from the area. The removed booths display in the list of Unassigned Booths.

6. Click Save.

Defining Exposition Descriptions

Define exposition descriptions on the Expo Description window.

Expo Description window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Description

Description

Enter a description of the exposition (1000 alphanumeric characters). Use the Description for inquiries, to paste content into word-processing documents, or to print on reports you design.

User-defined Fields

Enter all applicable exposition information. The user-defined fields are enabled under the Expo Description Fields area of the Exposition
Set up module window.

To define an exposition description

1. Open the Expo Description window:

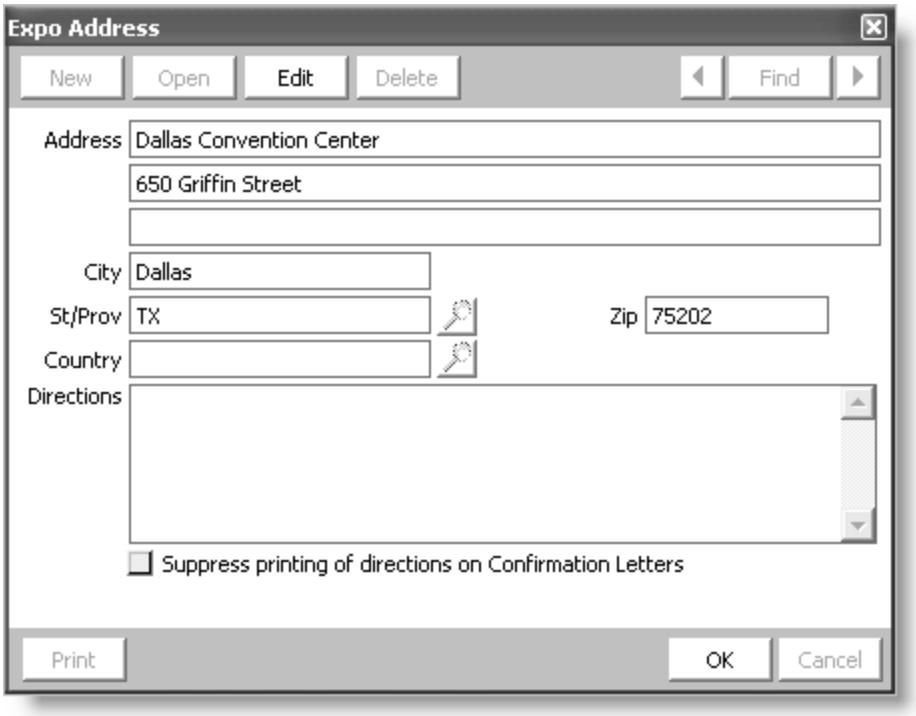
- From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
- Click More and select Description.

2. Click Edit.
3. Enter a Description of the exposition.
4. Enter any other applicable information in the User-defined Fields.
5. Click OK.

Defining Exposition Addresses

Define exposition addresses on the Expo Address window.

Expo Address window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Address

Address

Enter the location of the exposition (maximum of 50 alphanumeric characters). The Address displays on default confirmation letters, and you can include it on other reports.

City

Enter the city where the exposition is being held (maximum of 50 alphanumeric characters).

St/Prov

Enter the state or providence where the exposition is being held (maximum of 15 alphanumeric characters). Select the Find icon to look up a state or province code.

Zip

Enter the ZIP code where the exposition is being held (maximum of nine numeric digits).

Country

Enter the country where the exposition is being held (maximum of 20 alphanumeric characters). Select the Find icon to look up a country code.

Directions

Directions to the exposition location, with a maximum field size of 256 alphanumeric characters

Suppress printing of directions on Confirmation Letters

Enable to prevent printing directions to the exposition on confirmation letters.

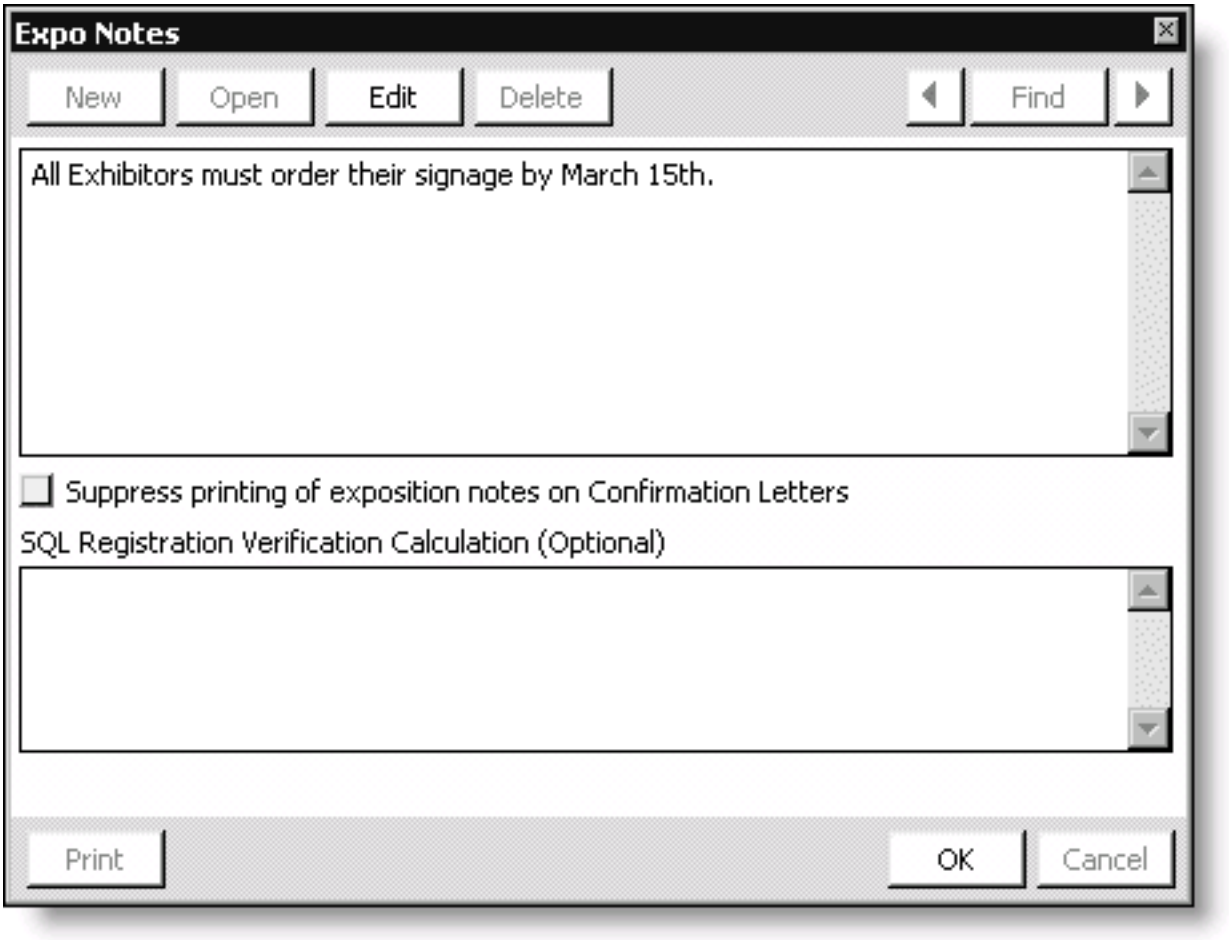
To define an exposition address

1. Open the Expo Address window:
   - From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
   - Click More and select Address.
2. Click Edit.
3. Enter the Address information for the exposition.
4. (optional) Enable Suppress printing of directions on the confirmation Letters to prevent printing the address on confirmation letters.
5. Click OK.

Defining Exposition Notes

Define exposition notes on the Expo Notes window.

Expo Notes window



From Exposition, select Set up an exposition, double-click an exposition, click More, and select Notes

Note

Enter a note or comment about the exposition (maximum of 256 alphanumeric characters).

Suppress printing of exposition notes on Confirmation Letters

Enable to prevent printing notes on confirmation letters.

SQL Registration Verification Calculation (optional)

Enter a SQL calculation. If you enter a SQL calculation, iMIS tests an exhibitor's eligibility based on the calculation's requirements.

The field stores a SQL calculation that results in either a 1 or a 0. If the calculation produces a 1, then iMIS allows you to create an order for the exhibitor. If the calculation results in a 0, then a message displays indicating that the exhibitor is not eligible and the order insertion is canceled.

The following is a sample calculation (the calculation varies from organization to organization). The sample calculation searches for all CM (company member) types:

select COUNT(*) from Name where MEMBER_TYPE='CM' and ID = [AsiSQL(Orders.ST_ID)]

To enter an exposition note

1. Open the Expo Address window:
   - From Exposition, select Set up an exposition, and double-click an exposition to open the Set up an exposition window (second instance).
   - Click More and select Notes.
2. Click Edit.
3. Enter a note or comment.
4. (optional) Enable Suppress printing of directions on the confirmation Letters.
5. (optional) Enter a SQL Registration Verification Calculation. (You must restart iMIS if entering a SQL calculation).
6. Click OK.

Canceling an Exposition

When you cancel an exposition, iMIS automatically reverses the accounting entries that were created during order processing. The income accounts are debited and Accounts Receivable is credited. All open receivable balances for unpaid orders are closed (brought to zero balance). For exhibitors who paid, the reversed entry results in open

credits. This credit can either be refunded or applied to other purchases or exposition orders. If product orders exist, they are purged.

If Delete Exposition Definition on Close is enabled on the Expo System Options window (from Exposition, select Set up module, and click Options), the exposition definition is deleted when you cancel the exposition. If the option is not enabled, the exposition you are canceling displays on the Set up an exposition window with a status of X.

Canceling an exposition is irreversible. Regardless of whether the Delete Exposition Definition on Close option is enabled, the product detail is deleted once the exposition is canceled.

To cancel an exposition

1. Open the exposition that you want to cancel:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
2. Click More and select Cancel Current Expo. (If current exhibitors are found, a message prompts you to cancel the expo. Click Yes.)
3. A message prompts you to verify canceling the expo. Click Yes.
4. A final message prompts you to verify canceling the expo. Click Yes to cancel the exposition.

Closing an Exposition

You must close the exposition before exposition activity records can be created. When closing a completed exposition, the order data is replaced with activity records.

If the Delete Expo Definition on Close option is enabled in the Expo System Options window (from Exposition, select Set up module, and click Options), the definition and planning records for the exposition are purged when you close the exposition. If this option is disabled, the exposition and product planning information remains in iMIS, the exposition

detail is purged, and a “C” displays in the Exposition Status field to indicate that the exposition has been closed.

To close an exposition

1. Open the exposition that you want to close:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
2. Click More and select Close Current Expo. (If active orders are found, a message prompts you to close the exposition and create activity records. Click Yes.)
3. A message prompts you to verify closing the exposition. Click Yes.
4. A final message warns you that all exposition details are removed and that activity history is generated for all the exhibitors. Click Yes to close the exposition.

Exposition Product Definition

Overview of exposition product definition

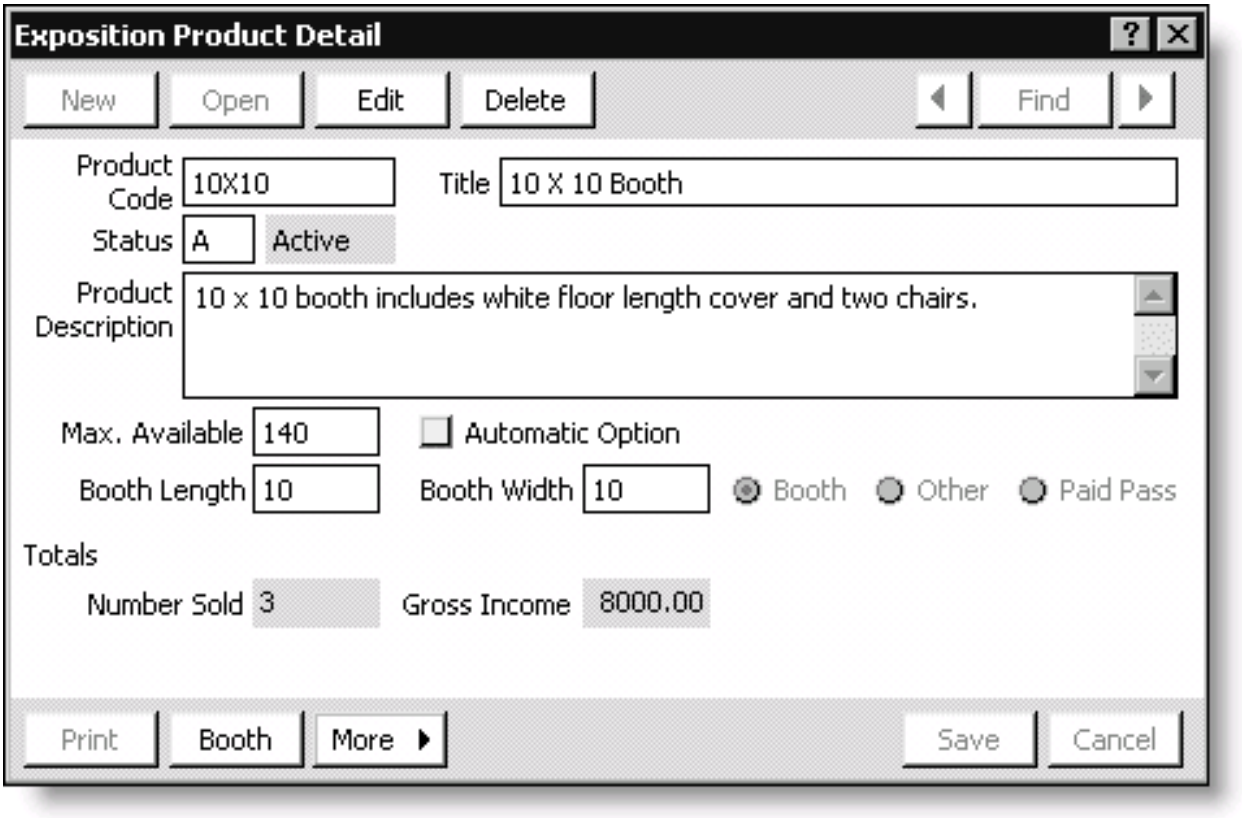
Exposition products are items sold to exhibitors to generate revenue. The booth product is the primary product sold, but examples of other exposition products include paid and free passes, sponsorships, and advertising.

Use the Exposition Product Detail window to define exposition products. After you define your exposition products, you can enter the pricing structure (Exposition Booth & Product Fees window), define linked products, and define upsell products.

Defining Exposition Products

Before you can define exposition products, you first must define the exposition. See Defining and Managing Expositions (see "Exposition Definition") for more. Exposition products and product information are defined using the Exposition Product Detail window.

Exposition Product Detail window



From Exposition, select Set up an exposition, double-click an exposition, and double-click an exposition product

Product Code

Enter a code for the exposition product. The code must be unique within each exposition.

Title

Enter a name for the product. The product Title displays on all lists and reports that show individual products, such as confirmation letters, tickets, and detailed rosters (maximum characters: 60).

Status

Enter the product's status:

- A = Active (accepting orders) is the default
- P = Pending (still in the planning stages)

- F = Frozen (currently locked from ordering)
- C = Closed (orders no longer accepted)
- X = Canceled

Note: Product status is not related to exposition status.

Product Description

Enter a description of the product, such as size or color. The Product Description does not print on reports, but it can be used to store data for exporting to a directory.

Max Available

Enter the maximum number of products available for this exposition (maximum characters: four). Once booths are created, you cannot edit this number without first removing booths.

Automatic Option

(optional) Enable to automatically add the product to each new order.

Booth Length

(Displays only when Booth is enabled for a product) Enter the length of the booth (integer-/whole number).

Booth Width

(Displays only when Booth is enabled for a product) Enter the width of the booth (integer-/whole number).

Taxable

(Not shown/Canadian tax only) Enable the appropriate tax authority: GST or PST. These options display only if the Canadian Taxation Method for the default organization is enabled in the Organization Names window.

Booth

Enable to indicate that the product is a booth. The Booth Length field, Booth Width field, and Booth button display when Booth is enabled.

Other

Enable to indicate that the product is anything but a booth or paid pass, such as program advertisement or sponsorship.

Paid Pass

Enable to indicate that the product is a paid pass.

Totals

Number Sold - Displays the number of products sold.

Gross Income - Displays the product's expected gross income.

Booth button

(Displays only when Booth is enabled for a product) Opens the Booths window used for generating, adding, removing, and importing booths.

More button

Click to display a menu of additional exposition-product set up options.

To define an exposition product

1. Open an exposition:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
2. Click Insert to open the Exposition Product Detail window.
3. Enter a unique Product Code.
4. Enter all applicable product information.
5. Click Save.

To edit or delete an exposition product

If you edit a booth product and change the product type from Booth to Other or Paid Pass, the booth numbers are deleted. You must regenerate the booth numbers if you change the product's type back to Booth.

When deleting products, only products for which no open orders exist can be deleted. If open orders exist for a product, you must either process the orders or remove the product from the orders before deleting the product.

1. Open an exposition:

- From Exposition, select Set up an exposition to open the Set up an exposition window.
- Double-click the exposition to open it on the Set up an exposition window (second instance).

2. Select a product from the list of Exposition Products.
3. To edit the product, do the following:

- Click Edit to open the Exposition Product Detail window.
- Make any necessary changes.
- Click Save.

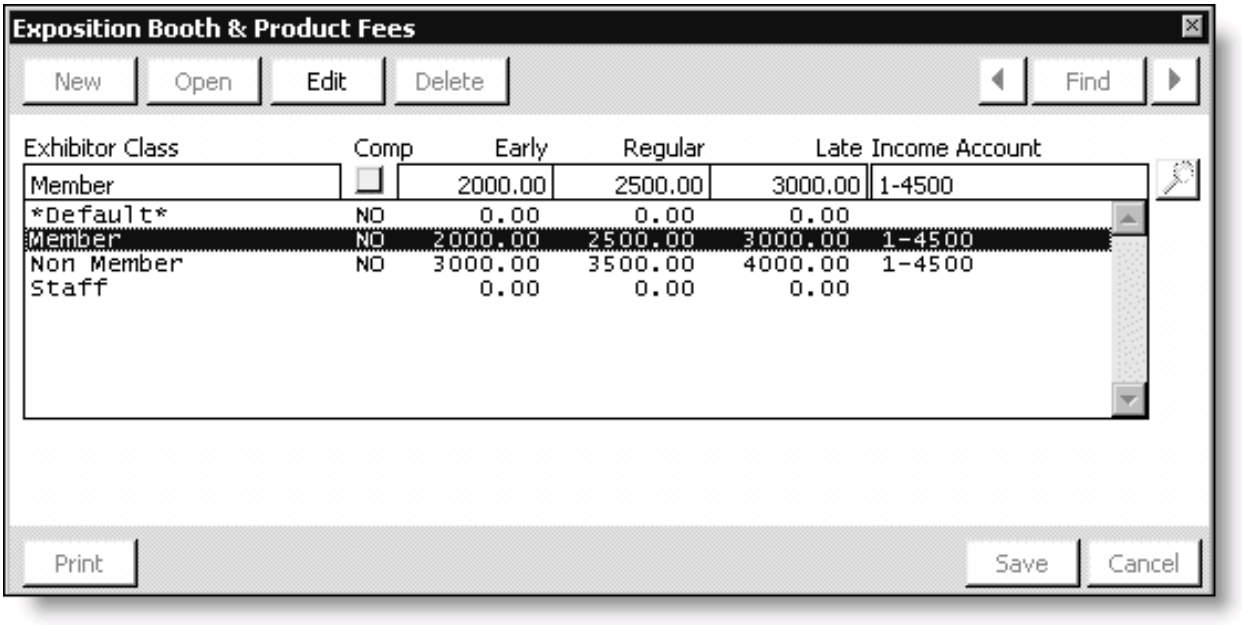
4. To delete the product, do the following:

- Click Delete. A message prompts you to verify deleting the product.
- Click Yes to delete the product.

Defining Product Fees

Follow these procedures to set pricing (fees) for exposition products and to assign a general ledger account number to record the income from those fees. Exposition product fees are set up on the Exposition Booth & Product Fees window.

Exposition Booth & Product Fees window



From Exposition, select Set up an exposition, double-click an exposition, double-click an exposition product, click More, and select Fees

Exhibitor Class

Displays the exhibitor's class as defined on the Set up exhibitor classes window. If Default is assigned, the product fees apply to all exhibitor classes (customer types). The following are examples of exhibitor classes:

- M = Member
- NM = Non-Member
- SP = Speaker
- STAFF = Staff

Comp

Enable to NOT charge the selected exhibitor class a fee for the product.

Early

Enter the rate that applies when an exhibitor places an order on or before the established Early Cutoff date as defined on the Set up an exposition window.

Regular

Enter the rate that applies when an exhibitor places an order for a product after the Early Cutoff date but before the Late Cutoff date.

Late

Enter the rate that applies when an exhibitor places an order after the established Late Cutoff date as defined in the Set up an exposition window.

Income Account

Enter the general ledger account number for the selected product. Select the Find icon to look up an account.

Deferred Account

Enter the general ledger number that records the fee until it is transferred to current income (when the exposition is presented). The Deferred Account field only displays if you are licensed for Deferred Income. Select the Find icon to look up an account.

To define product fees

1. Open an exposition product on the Exposition Product Detail window:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
   - Double-click a product.
2. Click More, and select Fees to open the Exposition Booth & Product Fees window.
3. Click Edit.
4. (optional) Enable the Comp option if the Exhibitor Class will not be charged for the exposition product.

5. Enter product fee information for each Exhibitor Class (iMIS automatically populates the decimal point and zeros):

- Early
- Regular
- Late

6. Enter an Income Account for each Exhibitor Class.

   Note: If you select *Default* and enable Comp, all exhibitors receive the selected product at no charge. If you select a specific Exhibitor Class and enable Comp, then only exhibitors in that class receive the product at no charge. See Editing Exposition Orders.

7. (optional) Enter a Deferred Account number for the *Default* line.

8. Click OK.

Linking Exposition Products

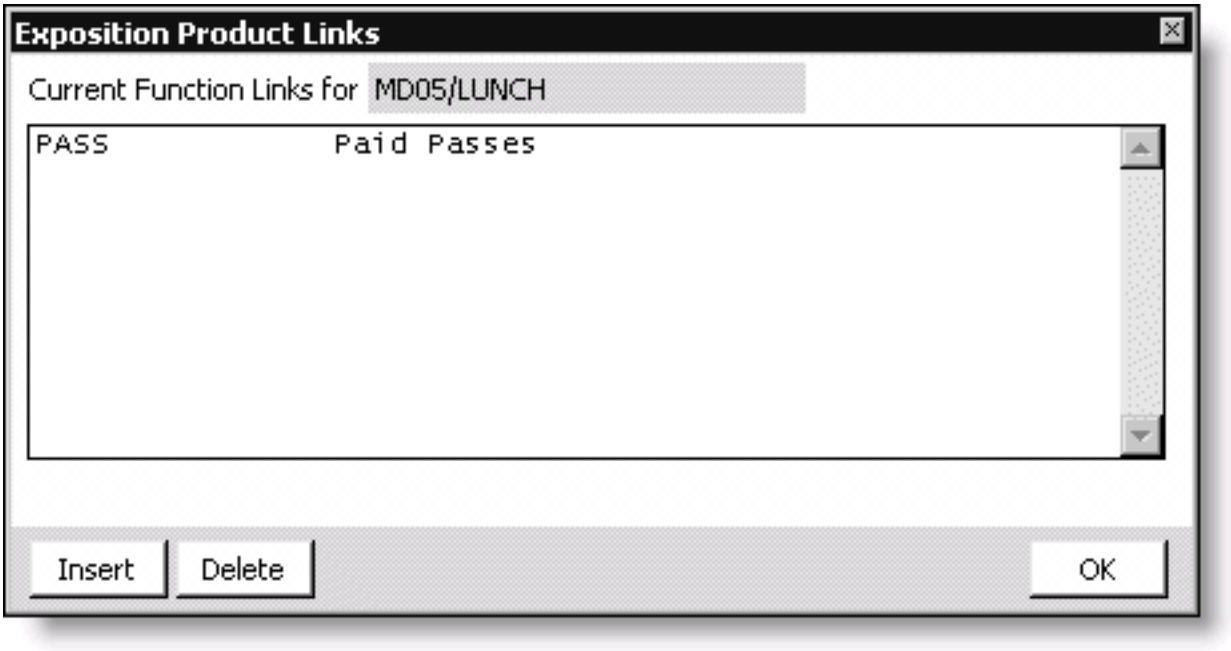
The Links option allows you to associate a primary (parent) product to a secondary (child) product. When an exhibitor orders a primary product, iMIS automatically adds all of the primary product's linked secondary products to the order.

Linking products is a shortcut for data entry. If you deselect the primary product, then iMIS leaves the linked products selected (selecting the parent also selects the children, but deselecting the parent affects only the parent). You have the option of individually selecting and deselecting linked products at any point during the exposition management process.

Use the Exposition Product Links window to link products.

Note: The linking feature does not affect either product pricing or complementary functions.

Exposition Product Links window



From Exposition, select Set up an exposition, double-click an exposition, double-click an exposition product, click More, and select Links

Current Function Links for

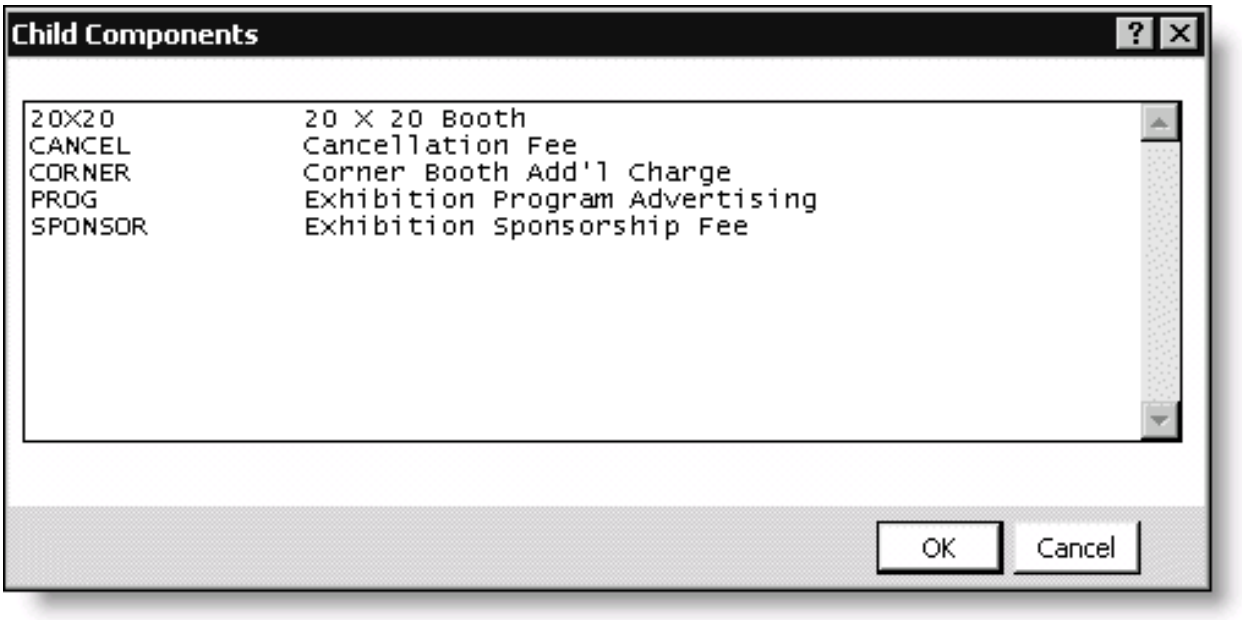
Displays the name of the parent product.

Linked Products

Displays the primary product's linked secondary products.

Insert button

Opens the Child Components window used for selecting secondary products:



Secondary Products - Lists all available (non-linked) products.

Delete button

Click to break the link to a selected secondary product.

To define a product link

1. Open an exposition product on the Exposition Product Detail window:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
   - Double-click a product.
2. Click More, and select Links to open the Exposition Product Links window.
3. Click Insert to open the Child Components window.
4. Select a secondary product, and click OK to link the secondary product to the primary product.

To delete a product link

1. Open an exposition product on the Exposition Product Detail window:

- From Exposition, select Set up an exposition to open the Set up an exposition window.
- Double-click the exposition to open it on the Set up an exposition window (second instance).
- Double-click a product.

2. Click More, and select Links to open the Exposition Product Links window.
3. Select the secondary product link you want to delete, and click Delete. A message prompts you to verify deleting the link.
4. Click Yes to delete the link.

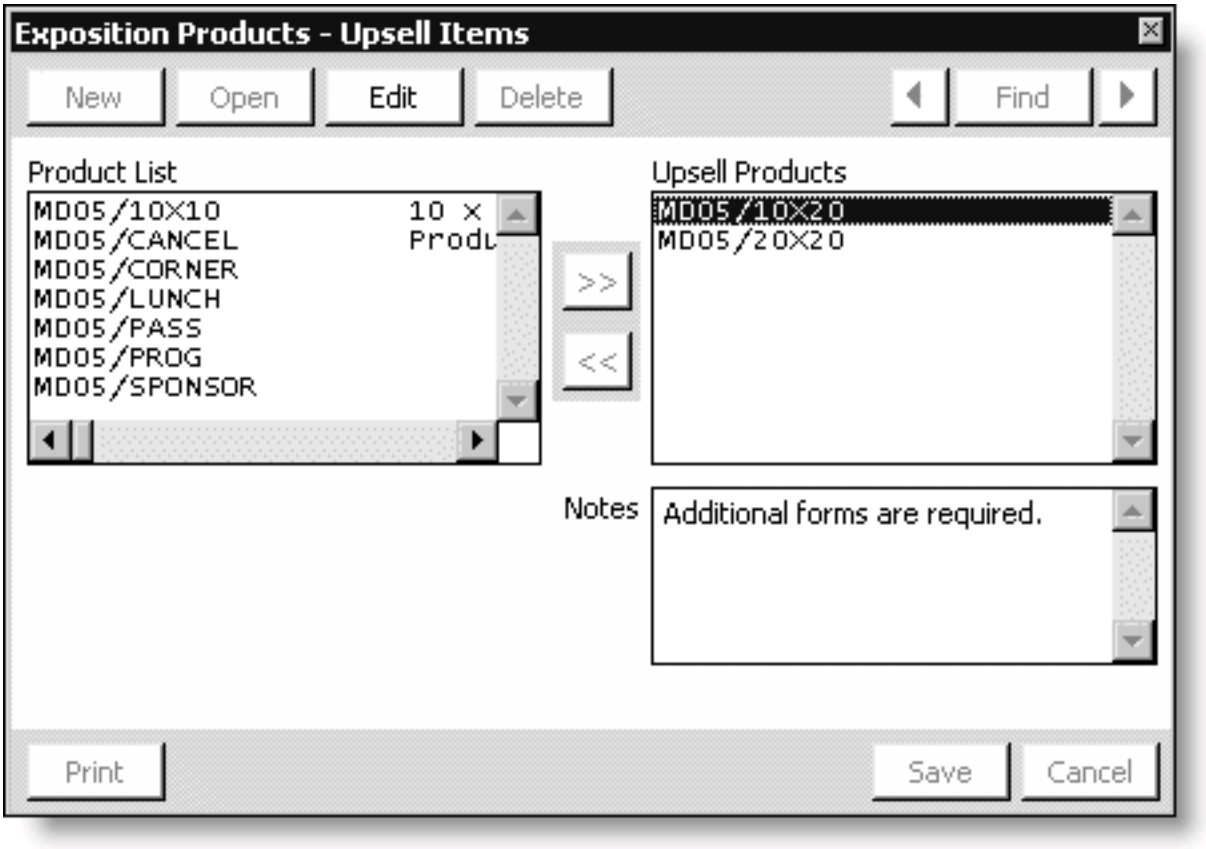
   Note: The primary and secondary products are no longer linked. You did not delete any products. If you filled an order with a primary product linked to a secondary product, you must delete the linked (secondary) product from the order manually. See Editing Exposition Orders for detailed procedures.

Defining Upsell Items

When exhibitors order products, additional items often are available that complement the products ordered initially. Upsell functionality allows you to designate and associate these items with other exposition products.

By relating items, salespeople can view available upsell products when marketing a specific product. Upsell items are designated on the Exposition Products - Upsell Items window.

Exposition Products - Upsell Items window



From Exposition, select Set up an exposition, double-click an exposition, double-click an exposition product, click More, and select Upsell

Product List

Lists available products.

Upsell Products

Displays all upsell products selected from the Product List.

Notes

Enter any additional information about an upsell product. (Enter up to 640 characters or 20 rows of data containing 32 characters each.)

To define an upsell product

1. Open an exposition product on the Exposition Product Detail window:

- From Exposition, select Set up an exposition to open the Set up an exposition window.
- Double-click the exposition to open it on the Set up an exposition window (second instance).
- Double-click a product.

2. Click More, and select Upsell to open the Exposition Products - Upsell Items window.
3. Click Edit.
4. Select an item from the Product List, and click >> to add the selected product to the list of Upsell Products.
5. Enter any applicable Notes for the selected upsell product.
6. Click Save.

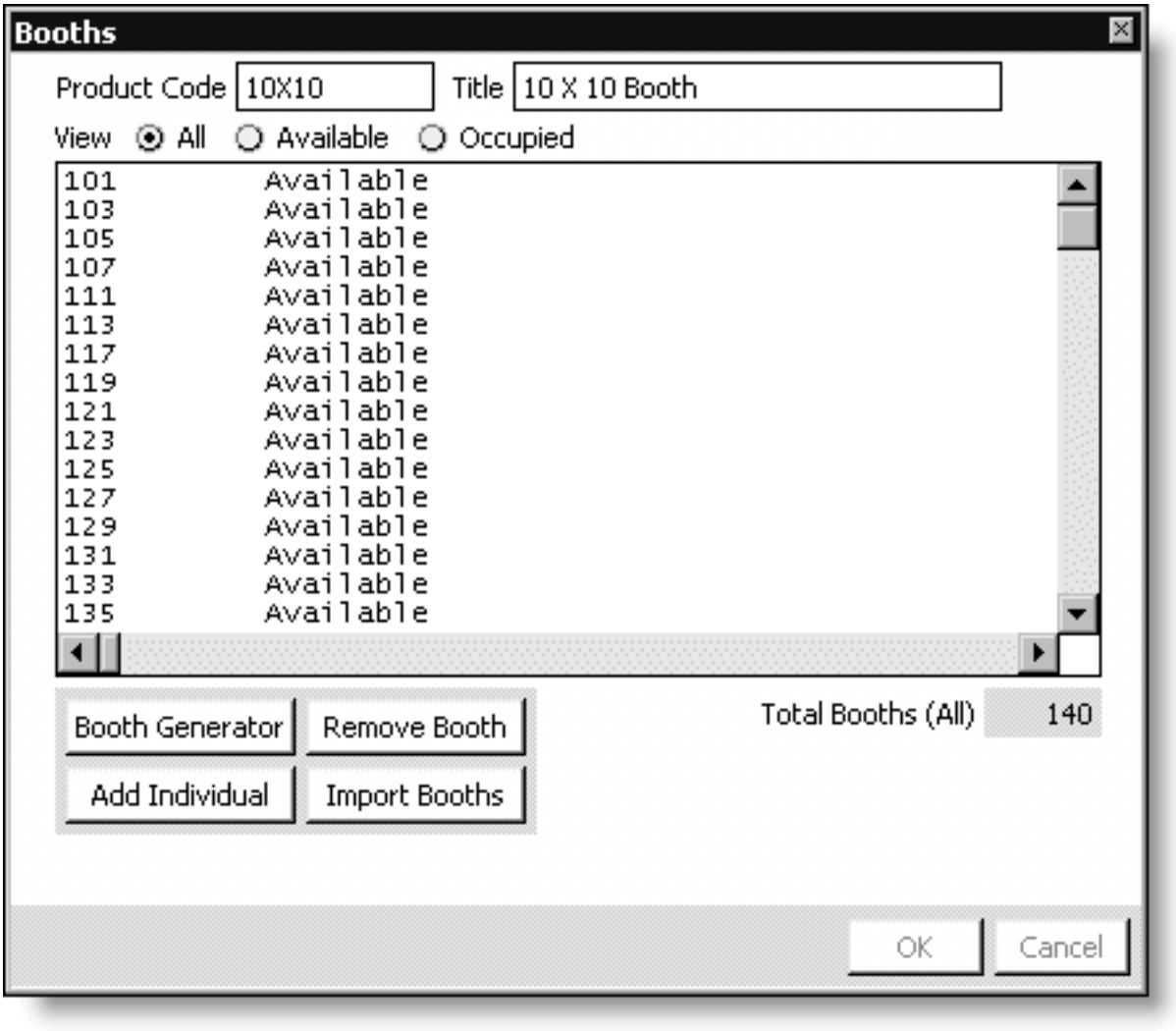
Managing Booth Inventory

Booths are primary exposition products. How you generate booths depends on the number of booths needed and whether your numbering scheme allows you to generate a range of booths. For example, if the booth numbers are sequential within a given range of booths (such as an aisle), or if the numbers are all odd or even within that range, then the fastest way to generate booth inventory is to use the booth generator.

Perform the following tasks using the Booths window:

- Add and delete booths
- Define and modify booth inventory
- Monitor booth status (available and sold)
- Import booth product files, such as from Excel

Booths window



From Exposition, select Set up an exposition, double-click an exposition, double-click an exposition product, and click Booth

Product Code

Displays the booth's product code.

Title

Displays the booth's title.

View

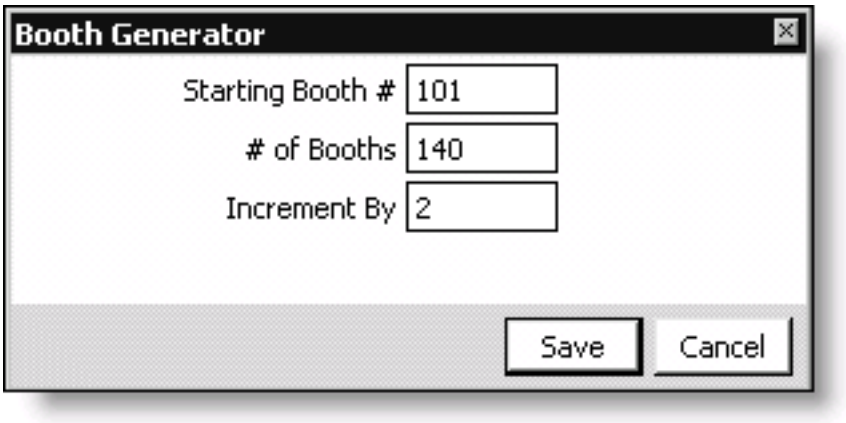
All - (Default) Enable to display all booths, available and occupied

Available - Enable to display all unassigned booths

Occupied - Enable to display all assigned (sold) booths

Booth Generator button

Opens the Booth Generator window used for defining a range of booths:



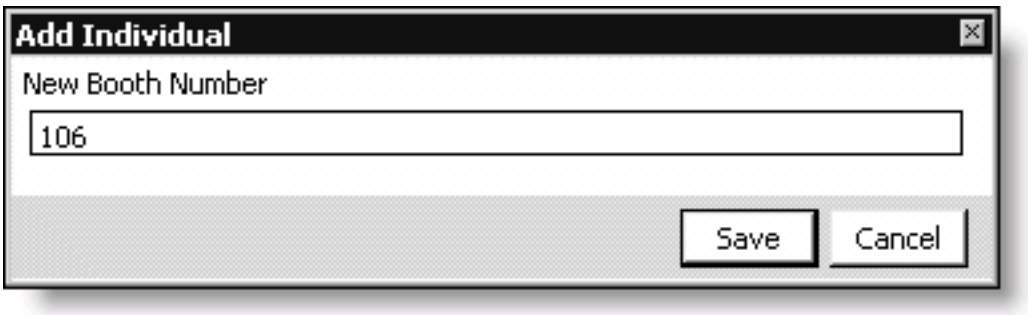
Starting Booth # - Enter the starting booth number.

# of Booths - Enter the total number of booths you want to generate.

Increment By - Enter the number by which you want to separate booth numbers.

Add Individual button

Opens the Add Individual window used for defining individual booths:



Remove Booth button

Click to delete a booth.

Import Booths button

Click to import booths from an external file.

Total Booths (All)

Displays the total number of booths.

To generate booths

Generate a range of booths (or an individual booth) after defining a booth product. You can generate booths as often as necessary for a booth product as exposition requirements change.

1. Open an exposition product on the Exposition Product Detail window:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
   - Double-click a product.
2. Click Booth to open the Booths window.
3. Generate a range of booths:
   - Click Booth Generator to open the Booth Generator window.
   - Enter the Starting Booth # for the range of booths.
   - Enter the # of Booths.
   - Enter the number you want to Increment By.

   Note: Booth numbers can be generated up to 15 digits in length. If you enter an originating number greater than 15 digits, or if you enter a booth number range that generates a number greater than 15 digits, an error message is provided. You must begin with a new booth number or range.
4. Generate an individual booth:
   - Click Add Individual to open the Add Individual window.
   - Enter a New Booth Number.

Note: Individual booth numbers cannot exceed 20 digits. If you add an individual booth number that exceeds 20 digits, the booth number is not saved, and an error message is not provided.

5. Click Save to generate the booth(s).

To remove booths

While managing your booth inventory, you may need to remove a booth from time to time. You may encounter a numbering error or a change in exposition floor layout. You also may want to remove individual booths to create small gaps within a large range of booths.

Note: You cannot remove a booth from inventory if the booth has been ordered. See Editing Exposition Orders to delete the booth from the order before removing the booth from inventory.

1. Open an exposition product on the Exposition Product Detail window:

- From Exposition, select Set up an exposition to open the Set up an exposition window.
- Double-click the exposition to open it on the Set up an exposition window (second instance).
- Double-click a product.

2. Click Booth to open the Booths window.
3. Select the booth(s) you want to remove from inventory, and click Remove Booth. A message prompts you to verify deleting the selected booth.
4. Click Yes to remove the selected booth(s).
5. (optional) If you entered a Max. Available quantity for the booth product on the Exposition Product Detail window, a message prompts you to adjust the maximum available quantity. Click Yes to adjust the Max. Available quantity to match the number of remaining booths.

To import booths

You can import booth numbers from other database files if the numbers are stored in a tab delimited file (fields are separated by a tab).

1. Open an exposition product on the Exposition Product Detail window:
   - From Exposition, select Set up an exposition to open the Set up an exposition window.
   - Double-click the exposition to open it on the Set up an exposition window (second instance).
   - Double-click a product.
2. Click Booth to open the Booths window.
3. Click Import Booths to open the Select import file window.
4. Select the File name that contains the booth numbers you want to import.
5. Click Open to import the files.

   Note: It is not necessary to assign a status to the booths. iMIS assigns a status of Available as the files are imported.

Extending iMIS SOA

In order to learn how to extend SOA, you must first have an understanding of how all the underlying SOA pieces fit together. For a quick overview of the layers, see Architecture: Importance of Layers. This document will delve into how this translates into code. An SOA module consists of data contracts, a persistence layer and client services. Let us start with an overview of each piece of an SOA module before getting into a detailed implementation for each level.

SOA Architecture Overview

Client Services

SOA is built on the Windows Communication Foundation (WCF), which differs from Web services in that the client needs a list of known types and is restricted to a specific set of operations. These known types are what we call Data Contracts. The specific operations are the standard operations you might expect for any generic object. They are called CRUDVE operations:

- Create (Add)
- Read (Find)
- Update
- Delete
- Validate
- Execute

The operations can be performed through the iMIS SOA Entity Service.

> **Note:** Note: Not all operations are supported on all entity types. The persistence layer defines which operations are applicable.

Client services also provide built- in caching. The caching functionality is discussed further with the details of a data contract.

Claims Map

SOA implements claims-based security. This means that when a particular user requests to perform an operation on a particular entity, SOA will go through the list of claims it knows of until it sees that the user has permission to perform the operation. This happens automatically when the user tries to perform the operation, but it can also manually be checked using the IEntityService.HasPermission method. The claims map looks like the following:

```
<?xml version="1.0" encoding="utf-8"?>
<m:ClaimsMapping xmlns:m-
m="http://schemas.imis.com/2008/01/DataContracts/Support">
  <m:IdentityMaps>
    <m:IdentityMap>
      <m:ClaimType>read,create,execute</m:ClaimType>
      <m:IdentityName>guest</m:IdentityName>
      <m:Resource>Membership</m:Resource>
    </m:IdentityMap>
  </m:IdentityMaps>
  <m:RoleMaps>
    <m:RoleMap>
      <m:ClaimType>read,create,update,delete,execute</m:ClaimType>
      <m:Resource>GroupMemberSummary</m:Resource>
      <m:Role>SysAdmin,IsStaff,OnBehalfOf</m:Role>
    </m:RoleMap>
```

```
    </m:RoleMaps>
</m:ClaimsMapping>
```

Manager classes

Manager classes, such as EntityService, MembershipManager, CommerceManager, and so forth, are like wrapper or helper classes for Entity Service. They are a way to enable you to perform common actions in one line so you are not required to write complicated code every time the functionality is needed. For example, you could call:

```
var price = CommerceManager.GetPartyItemPrice(EntityManager, ItemId, PartyId);
```

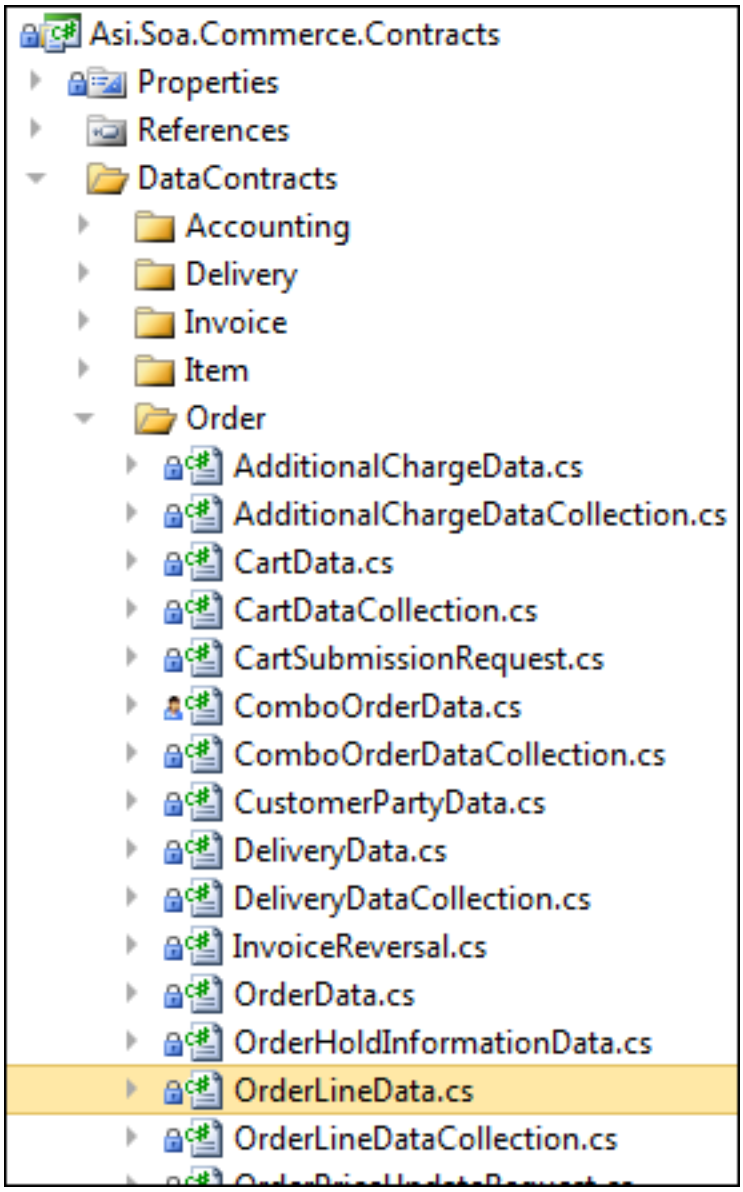
or

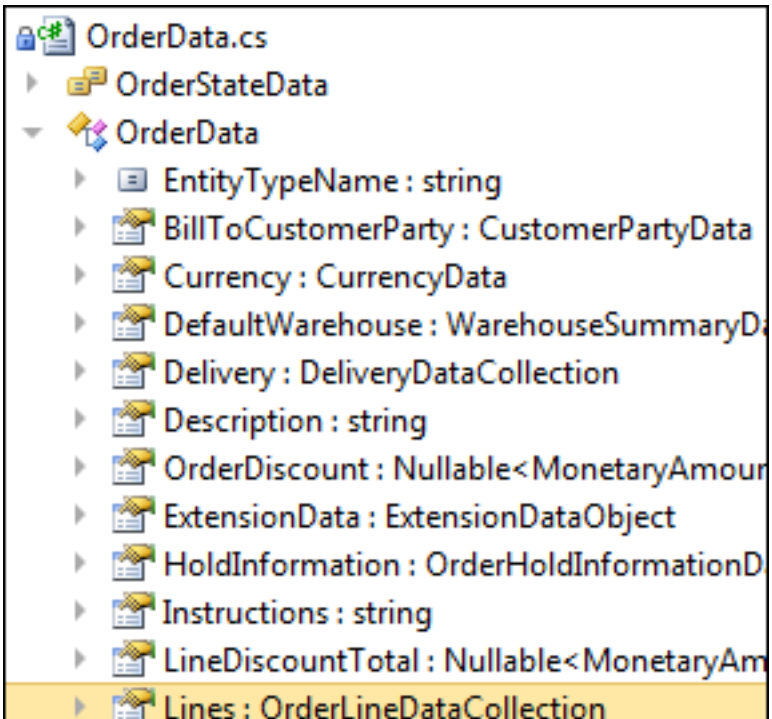
```
if (entityManager == null) throw new ArgumentNullException("entityManager");
var q = new QueryData("PartyItemPrice");
q.AddCriteria(CriteriaData.Equal("ItemId", itemId));
q.AddCriteria(CriteriaData.Equal("PartyId", partyId));
var price = entityManager.FindSingle(q) as PartyItemPriceData;
```

> **Note:** Note: Manager classes are not a necessary step in implementing a new SOA module.

Data Contracts

A data contract defines the structure of the data that end users will have access to. Some data contract classes represent a primary entity which can be accessed directly through the SOA API. Other data contract classes represent second-class entities that can only be accessed using their parent entity. In the following example, OrderData is a primary entity, while OrderLineData is a child entity which can only be accessed using Order-Data.Lines.

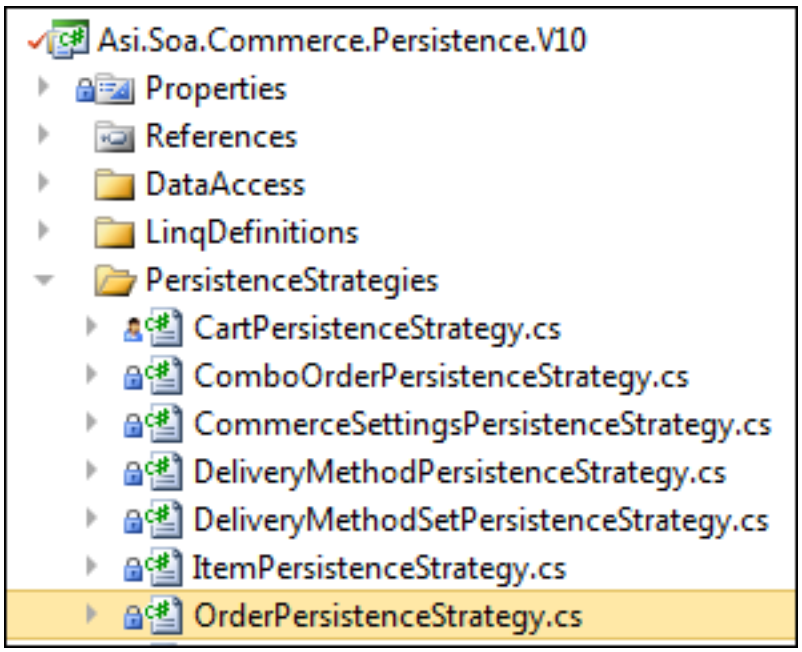

Asi.Soa.Commerce.Contracts
Properties
References
DataContracts
Accounting
Delivery
Invoice
Item
Order
AdditionalChargeData.cs
AdditionalChargeDataCollection.cs
CartData.cs
CartDataCollection.cs
CartSubmissionRequest.cs
ComboOrderData.cs
ComboOrderDataCollection.cs
CustomerPartyData.cs
DeliveryData.cs
DeliveryDataCollection.cs
InvoiceReversal.cs
OrderData.cs
OrderHoldInformationData.cs
OrderLineData.cs
OrderLineDataCollection.cs


OrderData.cs
OrderStateData
OrderData
EntityTypeName : string
BillToCustomerParty : CustomerPartyData
Currency : CurrencyData
DefaultWarehouse : WarehouseSummaryD
Delivery : DeliveryDataCollection
Description : string
OrderDiscount : Nullable<MonetaryAmour
ExtensionData : ExtensionDataObject
HoldInformation : OrderHoldInformationD
Instructions : string
LineDiscountTotal : Nullable<MonetaryAm
Lines : OrderLineDataCollection

Unfortunately, there is no easy way to indicate to users what is considered a primary entity. Therefore, it is recommended that you document your primary entities as in Common Entity Types.

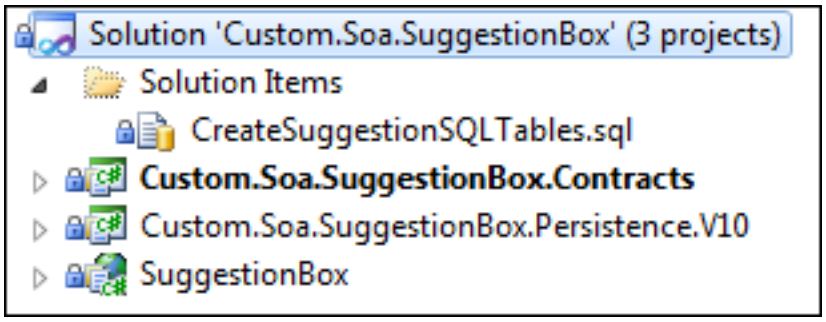
Persistence Layer

To populate the data contracts and perform any business logic, you need a persistence layer. This layer typically contains a combination of LINQ definitions and persistence strategies, as well as a RegisterEntityTypes file that links the persistence to the appropriate data contracts. This layer can be as simple as a definition of where the data maps in SQL for selects and updates. This layer can also contain business logic for the workflow, performing complex actions or even validation. A separate persistence strategy is needed for each of the primary entity types.



Learning by Example

With this basic understanding of SOA infrastructure, look at an example module of SOA. Open the Solution Custom.Soa.SuggestionBox.sln. This can be found on imis-community.com under develop > SDK Center > iMIS SOA Web Services. It will look like the following:

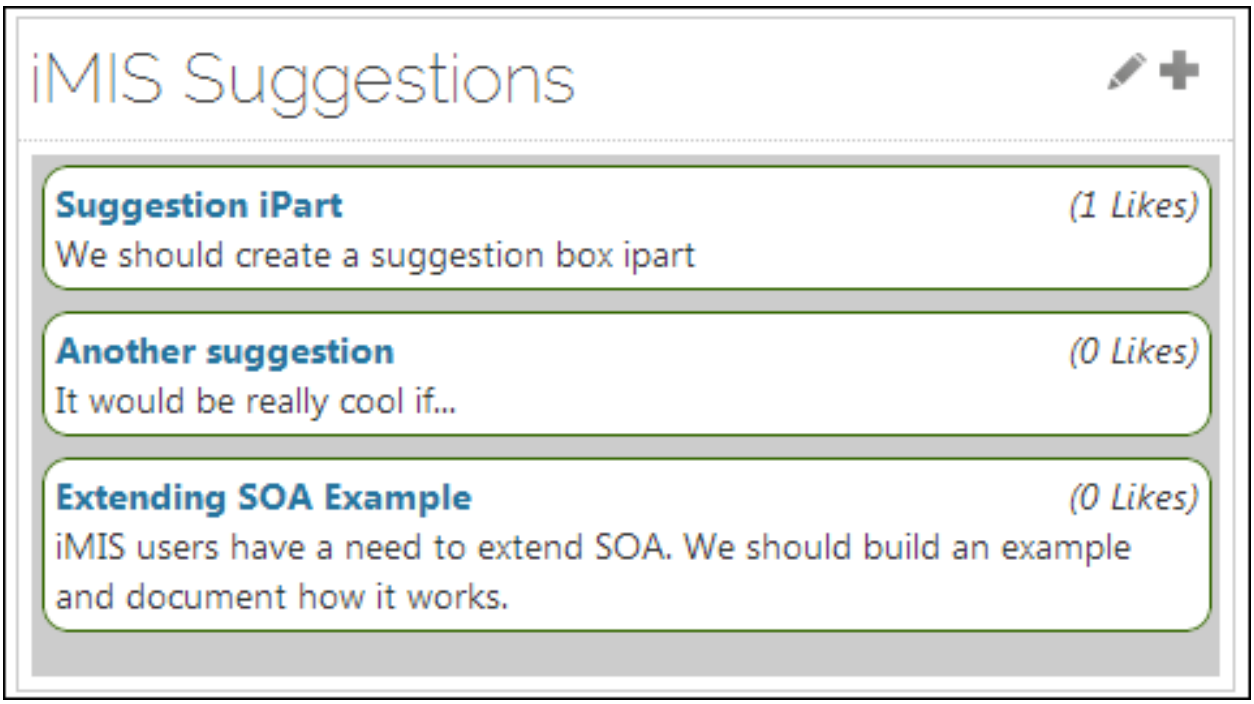


The three projects are:

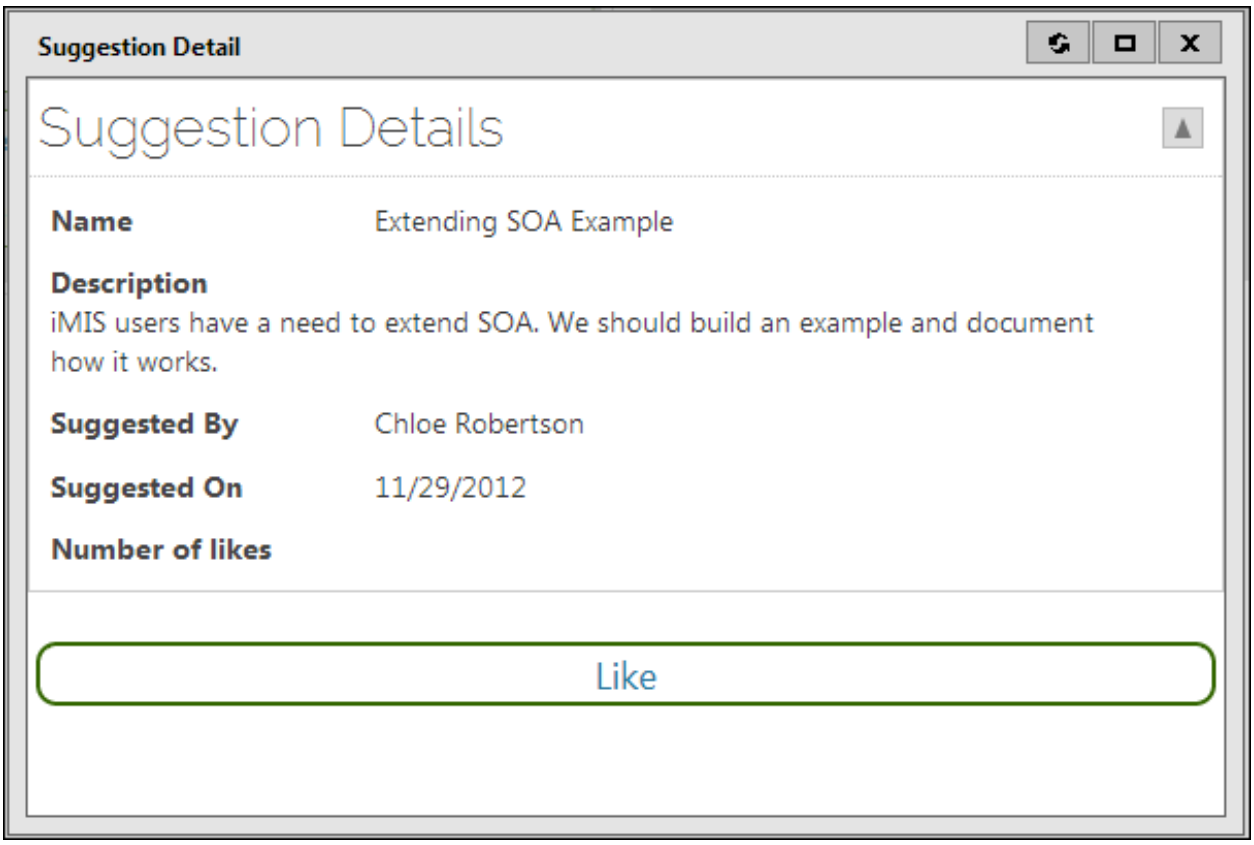
- Custom.Soa.SuggestionBox.Contracts – Data Contracts
- Custom.Soa.SuggestionBox.Persistence.V10 – Persistence Layer
- SuggestionBox – iPart to demonstrate the functionality of the previous two projects

This example is for creating a suggestion box module. This module will let you create categories for a suggestion, for example, “Annual Conference Locations”, “Product Improvements”, “HR Suggestion Box”, and so forth. You can create suggestions in each of these categories. You can allow people to vote on which suggestions they like best.

The following figure shows what the iPart will look like. When users log in, they see a list of suggestions on which they can vote. They also have an opportunity to add another suggestion.



Clicking on a suggestion will show a detail view in a pop-up window and allow users to vote.

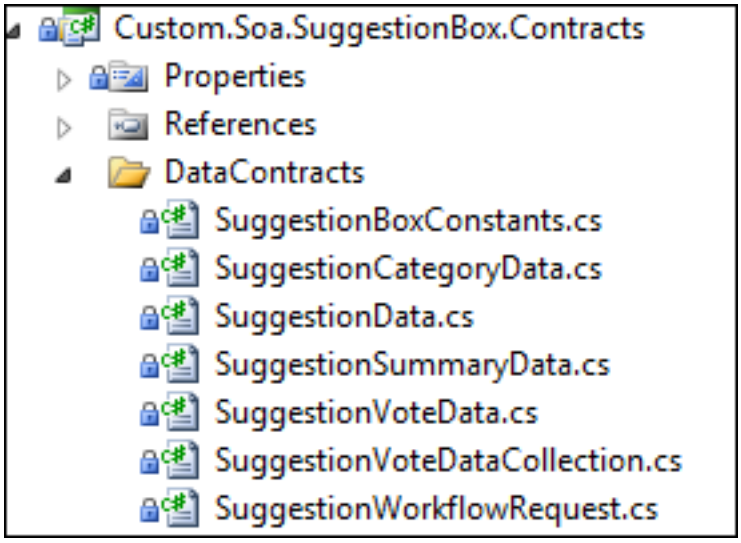


The following information discusses the code.

First, you need to create some tables in which to store the data. When building SOA extensions in the field, the SQL tables might already exist. For this example, create some new SQL tables. Run the script named CreateSuggestionSQLTables.sql, which can be found in the Solution Items.

Note: Note: For SQL help see SQL Best Practices and Conventions on imis-community.com

Contracts



A contract project typically contains the following types of files:

- [EntityName]Data.cs – Data contract definitions.
- [EntityName]DataCollection.cs – This is not usually a primary entity, but rather an object definition that is used within another entity, for example, OrderLineDataCollection is defined so that it can be used in OrderData.Lines.
- [ExecuteMethodName]Request.cs – This is only necessary when you need to define an Execute method on your data contract.
- [SOAModule]Constants.cs – A convenience/helper file.

The most important of these files are the files that end with Data.cs. These are the definitions for the objects. The suggestion box consists of three main entities:

- Suggestion categories
- Suggestions
- Suggestion Votes

Note that there is a file named SuggestionData as well as a file named SuggestionSummaryData. This is a convention often used in SOA, where smaller objects can be

used to quickly see a subset of information without having to retrieve the whole object. From a developer standpoint, this is similar to the concept of sub-classing. It is handy when listing a large number of objects as a list because the summary objects have a smaller footprint. Then, if the object needs to be updated or more details are needed, you would typically retrieve the full/non-summary version at that time.

It is good practice for data contracts to implement the IExtensibleDataObject interface. Implementing the IExtensibleDataObject interface "Provides a data structure to store extra data encountered by the XmlObjectSerializer during deserialization of a type marked with the DataContractAttribute attribute." This implementation ensures that if a client does not have the latest version of the contract, and the latest server-side contract has additional new properties, then if a contract instance is passed to the client when the client returns the contract instance, the new/extra properties will not be lost but will make the entire round trip (stored in the ExtensionData property). Note that in the above example SuggestionData does not require the ExtensionData property because it is inherited from SuggestionSummaryData.

There are three important attributes to add to your data contract classes:

- DataContract with a Namespace set
- Entity with an EntityTypeName set (only needed on primary entities)
- CachingPolicy – Adding this attribute tells the entity service how long it should automatically cache this object, for example, Short/5 seconds, Medium/5 minutes, and so forth (only needed on primary entities).

```
/// <summary>
/// Represents a suggestion.
/// </summary>
[DataContract(Namespace = SuggestionBoxConstants.SuggestionBoxDataContractsNamespace)]
[Entity(EntityTypeName = EntityTypeName)]
[CachingPolicy(CacheLifetime.Default)]
public class SuggestionData : SuggestionSummaryData
{
    /// <summary>
    /// Entity type name.
    /// </summary>
    public new const string EntityTypeName = "Suggestion";
```

Things to keep in mind when designing your data contracts:

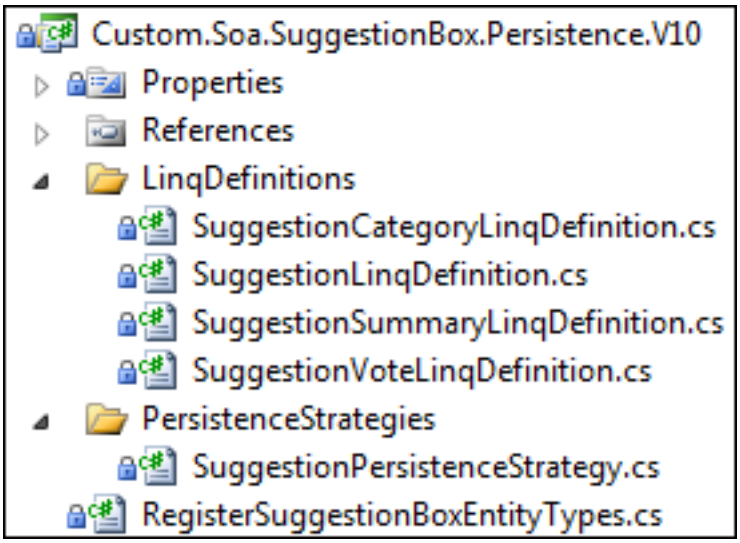
- Because the data contract appears on the client, make it as helpful and useful as possible. Avoid making data correspond to the columns in a table, but provide meaningful data that will be useful to a client. For example, do not provide lots of IDs that require the client then make further calls to look up the values for those IDs. Instead, provide the values for that referential data. SOA has a concept of Summary objects that provide a subset of useful information about an entity if the entity itself is very large. If a SQL table holds data linked to a contact (iMIS 20-Name record) for example, the data contract for that table should provide a PartySummary property populated with data for that contract. The data contract should not simply return the ID.
- Do not return GUIDs, which are concepts only used in particular coding platforms. Use strings instead. Asi.Soa.Core.Contracts provides standard data contract data types that ensure consistency in data contracts, such as QuantityData, CurrencyData, DocumentData, MonetaryAmountData and YearMonthDateData. The EntityUpdateInformationData provides the four standard update values used in iMIS:
- CreatedBy
- CreatedOn
- UpdatedBy
- UpdatedOn

  Use a single property called UpdateInformation with this data type instead of implementing four properties.
- Typically, set the EmitDefaultValue attribute to false. This is for generating the XML when serializing the object. Setting this attribute to false causes no XML to generate for any default values. This reduces the size of the transmission data.
- Do not use Key in a property name. Instead, use Id.

  This example defines an Execute operation, so let us look through the SuggestionWorkflowRequest.cs file briefly. This file has a custom enumerator defined, as well as

a class that inherits from ExecuteRequestBase. Since this example will only implement one operation for one entity type, both EntityTypeName and OperationName can be hard-coded. We also define operation-specific properties for the suggestion, the action to perform, and the party that is executing the action. Note that none of these operation-specific properties are required. If you define a simple execute method such as “Recycle old suggestions”, then it is not likely that you will need many extra properties, if you need any at all.

Persistence



A persistence strategy project typically contains the following files:

- [EntityName]LinqDefinition.cs – Used especially for reading the entity from the database. Usually contains properties, a GetEntity definition, and sometimes an UpdatePersistenceObjectFromEntity definition.
- [EntityName]PersistenceStrategy.cs – Usually built in conjunction with a LINQ definition. This is used when extra functionality needs to be defined, such as Execute methods.
- Register[ModuleName]EntityTypes.cs – Matches persistence strategies with the data contracts they define.

To populate the data contract object, there must be code to load and store database data. A goal for iMIS SOA is to work across old and new products: iMIS15, iMIS20, iMIS100,

and so on. This is another reason not to map data contracts directly to a database table, but to provide data that is conceptually useful for a developer who does not need to know about the underlying database design.

The next task in implementing a new entity type is to write the persistence code. Each SOA module has a persistence assembly. When creating projects/assemblies for persistence at ASI, we add a suffix of V10 to indicate it is specific to the iMIS 15/20 product line, or V100 if it is specific to the iMIS 100 product line.

Points to note while reviewing the example persistence project:

- GUID data types are used here because they must map to the SQL table column type.
- Property names are edited using the Column Name attribute to avoid the term key (replace it with id) and to ensure Pascal case, for example, a column named SALUTATION_TYPE would be a property SalutationType.
- Default order-by is needed to support LINQ-to-SQL paging (working with pages of results being returned).
- The IEntityPersistenceConversion interface is an iMIS SOA interface used by the LINQ-to-SQL persistence strategy. Implementing GetEntity allows data to be returned from the database, and implementing UpdatePersistenceObjectFromEntity allows database data to be updated.

There are several different types of persistence strategies. But for the purposes of this document, only two of the types will be explored: LINQ definitions and LINQ SQL persistence.

LINQ definitions

To see some examples of LINQ definitions, look at any of the files named [EntityName]LinqDefinition.cs. LINQ definitions are the easiest and most straight-forward persistence strategies. They are directly related to an SQL table or view, and contain properties that can be associated with columns on the table or view. They implement the IEntityPersistenceConversion interface, which requires two methods:

- GetEntity – This translates the LINQ definition into a data contract. This method typically only requires initializing an instance of the data contract and setting each of the properties to the values within the LINQ definition. However, extra logic can be performed here, such as concatenating fields or performing lookups to get a value.
- UpdatePersistenceObjectFromEntity – This translates the data contract back to the LINQ definition so it can be updated in the database.

  When querying an SOA entity, filters can only be placed on a field if the persistence defines a LINQ definition, and that LINQ definition has a property for the field which is directly associated with a column of an SQL table or view.

  EntityRefs and EntitySets

  When your data contract has another data contract as a property type, you might be able to make use of an EntityRef or EntitySet. Look at SuggestionLinqDefinition.cs for a variety of examples. An EntityRef can use another LINQ definition as defined within the same project or another persistence strategy project. Do the following to use an EntityRef:

1. Add a field for the EntityRef:

   ```
   private EntityRef<SuggestionCategoryLinqDefinition> suggestionCategory;
   ```

2. In the persistence constructor, initialize the field ():

   ```
   suggestionCategory = default(EntityRef<SuggestionCategoryLinqDefinition>);
   ```

3. Create a property for the entity with the LINQ definition as the type, and an Association attribute:

   ```
   [Association(Name = "Suggestion_SuggestionCategory",
   ThisKey = "SuggestionCategoryId", OtherKey = "SuggestionCategoryId",
   IsForeignKey = true, Storage = "suggestionCategory")]
   public SuggestionCategoryLinqDefinition SuggestionCategory
   {
      get { return suggestionCategory.Entity; }
   ```

```
}
```

4. Use the GetEntity method of the LINQ definition in your GetEntity method when setting the property:

```
SuggestionCategory = (SuggestionCategory != null ?
   (SuggestionCategoryData)SuggestionCategory.GetEntity() : null)
```

EntitySets work similarly to EntityRefs. These should be used instead of an EntityRef if you need a collection of the data contract. There are slight differences. Do the following to use an EntitySet:

1. Add a field for the EntitySet:

```
private readonly EntitySet<SuggestionVoteLinqDefinition> sug-
gestionVoteLinqDefinition;
```

2. In the persistence constructor, initialize the field ():

```
suggestionVoteLinqDefinition = new EntitySet<SuggestionVoteLinqDefinition>();
```

3. Create a property for the entity with the LINQ definition as the type, and an Association attribute:

```
[Association(Name = "Suggestion_SuggestionVote",
Storage = "suggestionVoteLinqDefinition", ThisKey = "SuggestionId",
OtherKey = "SuggestionId")]
public EntitySet<SuggestionVoteLinqDefinition> SuggestionVote
{
   get { return suggestionVoteLinqDefinition; }
   set { suggestionVoteLinqDefinition.Assign(value); }
}
```

4. Add each one to the collection by using the GetEntity method of the LINQ definition in your GetEntity method when setting the property:

```
suggestion.Votes = new SuggestionVoteDataCollection();

if (SuggestionVote != null)

{

   ...

   foreach (var vote in SuggestionVote)

      suggestion.Votes.Add(vote.ToSuggestionVoteData());

}
```

LINQ SQL persistence

To see an example of this approach, open SuggestionPersistenceStrategy.cs. This persistence type inherits from LinqSqlPersistenceStrategy and allows you to override the functionality of the following operations:

Entity Service Operation	Persistence Method Name	CRUDVE Operation Name
Add	SaveNew	Create
Delete	Remove	Delete
Execute	Execute	Execute
FindByIdentity	FindByIdentity	Read
Find	FindMatching	Read
Update	SaveChanged	Update
Validate	Validate	Validate

Only one of these operations will be discussed in-depth, Execute. For this example, an Execute method is added on SuggestionPersistenceStrategy.cs with a request type of SuggestionWorkflowRequest. This request type was defined in the data contracts so that you could make use of it in the persistence. If multiple request types were defined, you

could implement all of them within the same Execute method, but in this case you will only be concerned with workflow. Look within this method and notice that a check to make sure the correct request type was passed in is made, and that required properties are set before continuing on with the business logic. After this check, it is as simple as writing your methods as you normally would. Note that from here you can access information such as who the current identity/user is. You can also tap into any other APIs needed, such as iBO.

Register Entity Types

The last step when implementing a new primary entity type is to add the type to the registration code for the assembly in which you are working. Non-primary entity types, such as OrderLineData, do not need their own persistence strategies or their own registry info. In this example, a new class file called RegisterSuggestionBoxEntityTypes.cs is created. The class implements the IRegisterEntityTypes interface, which consists of PreRegisterEntityTypes and RegisterEntityType (which typically just returns null). Each EntityTypeInfo entry added to the collection can define the following properties:

- EntityTypeInfo takes the EntityTypeName of the new type as its TypeName parameter. This value should usually be defined as a constant in the data contract and match the name of the data contract class without the trailing “Data”.
- EntityType is the type of the data contract class.
- DataContractType is the type of LINQ class created. (optional)
- PersistenceStrategyType should be set to either the custom persistence type if a LINQ SQL persistence strategy was defined for the entity type, or “LinqSqlPersistenceStrategy” for entities that only have a LINQ Definition.
- PersistenceTableType is the type of LINQ class created. (optional)
- SecurityResourceGroup is set to be consistent with other types. It relates to role-based security and allows you to define security for a group of related entities. Some existing security resource groups are:

- "SystemSettings", "Import", and "IQA" from core
- "EventsSettings" from Events
- “CommerceTransactions” and"CommerceSettings" from Commerce and Fundraising
- "Membership" and "MembershipSettings" from Membership

In the SuggestionBox example, the existing claims map security for Membership and MembershipSettings was used. But the security resource group could have been left off in order to add claims on an entity-by-entity basis, or new security groups such as “SuggestionBox” and “SuggestionSettings” could have been used.

SOA Server

In order to pull the Data Contracts together with the persistence strategy, add two lines to the iMIS application web.config (or the SOA Service config file if running via SOAP): one to define the contract assembly, and another to define its entity type provider. For example, add the following highlighted lines to your iMIS web.config:

```
<Soa>
  ...
  <contractAssemblies>
  <contractAssembly assembly="Asi.Soa.Core.Contracts"/>
  ...
  <contractAssembly assembly="Asi.Soa.Nrds.Contracts"/>
  <contractAssembly assembly="Custom.Soa.SuggestionBox.Contracts"/>
  </contractAssemblies>
  <entityTypeProviders>
  <entityTypeProvider
  type="Asi.Soa.Membership.Persistence.V10.RegisterMembershipEntityTypes,
  Asi.Soa.Membership.Persistence.V10"/>
```

```
...
<entityTypeProvider type="Asi.Soa.Nrds.Persistence.RegisterNrdsEntityTypes,
Asi.Soa.Nrds.Persistence"/>
<entityTypeProvider
type="Custom.Soa.SuggestionBox.Persistence.V10.RegisterSuggestionBoxEntityTypes,
Custom.Soa.SuggestionBox.Persistence.V10"/>
<!-- Generally the Core.Persistence provider should be listed last, so that other applications can intercept
and supply service for deferred entity definition, as Core.Persistance may find a matching table, view or business object
and block other users applications if first.-->
<entityTypeProvider type="Asi.Soa.Core.Persistence.V10.RegisterCoreEntityTypes,
Asi.Soa.Core.Persistence.V10"/>
...
<settings>
...
</settings>
</Soa>
```

Using the example code

Once you build the example projects, copy them to the bin directory of the iMIS application and add the web.config entries listed in the previous section. Once this is done, you can start making use of the code. The following are some sample tasks you can perform with the code:

Adding a category

```
var category = new SuggestionCategoryData(){ CategoryName = "HR Suggestion Box"};
```

Finding a category

```
var category =
   EntityManager.FindByIdentity<SuggestionCategoryData>("HR Suggestion Box");
```

Adding a suggestion

```
var newSuggestion = new SuggestionData {
   SuggestionCategory = category,
   SuggestionName = "My Suggestion",
   Description = "My Description" };
var results = EntityManager.Add(newSuggestion);
```

Finding all suggestions for a category

```
var query = new QueryData("Suggestion");
query.AddCriteria(CriteriaData.Equal("SuggestionCategoryId", category.CategoryId));
query.AddCriteria(CriteriaData.IsEmpty("MarkedForDeleteOn"));
FindResultsData results = EntityManager.Find(query);
```

Adding a vote

```
SuggestionVoteData vote =
   new SuggestionVoteData { Party = party, Suggestion = suggestion };
var result = EntityManager.Add(vote);
```

Suggestion Box iPart

To see an example of how ASI makes use of a module like this within an iPart, load the last project in our sample solution, the Web application project named SuggestionBox. (This iPart is compatible with version 15.2.1 of iMIS and later.) Do the following to add this module to iMIS:

1. Modify your iMIS application web.config to include the highlighted lines shown in the Client Services section above.
2. In iMIS, using the staff site, navigate to Rise > Utilities > Package installer (this will create the necessary folders for step 3 if they don't already exist)
3. On the application server, copy the SuggestionBox.ipackage from the example to [iMIS install path]\Net\package\pending.
4. Go back to iMIS and refresh the page to see the package waiting for install.
5. Click Install.

Now you should be able to add the iPart to a content record and start using it!

> **Note:** Note: This iPart is an example only. There may be kinks and it should be fully tested before being placed in a production system.

Review

Question: Why are the data contracts and persistence layers separate? Why not go for an all-in-one approach like iBO .NET?

Answer: SOA is designed to be platform-independent. The data contracts were designed to make sense to any developer who is not familiar with current iMIS database tables or business rules. This means that as iMIS transitions over the years, the data contracts should remain the same. It also means that we can use the same data contracts for both iMIS 20 and iMIS 100, so that anything written for one platform should also be able to work on the other platform.

Fundraising Administration

Fundraising Event Management

In iMIS, when an individual registers for a fundraising event function, the registration fee for the function is counted as a donation. For example, if an event has two functions, a fundraising banquet with a $50 registration fee and a non-fundraising seminar with a $25 registration fee, $50 of the registration for both functions counts as a gift.

When you designate an event function as a fundraising function, you can also specify other fundraising information, such as campaign, appeal, and fair market value.

Defining an event as a fundraising event

Events are defined in the Events > Define an event window (see "Define an event - event details window"). Procedures for defining a fundraising event are the same as those for defining a regular event except for a few fundraising features.

Multiple entities

If your system is configured to use multiple financial entities (see "Multiple Entity Processing"), you can define a default entity code for an event and assign different entities to some or all of your event functions. This enables you to offer a mix of fundraising and non-fundraising functions, and a mix of entities receiving income, within the same event.

Need more?

For details about event and function definition and fees, see the Events section:

- Define an event - event details window
- To define an event
- Event Function Detail window
- To define event functions

Receipts, reports, and summaries

Registration fees for fundraising functions are included in Fundraising reports and summaries. Fundraising function fees are marked as fundraising items in Events reports and summaries and in customer receipts and invoices.

Setting event function fees

After you define your functions, define the fees associated with each function. Set function fees in the Event Function Definition - Fees window.

You can charge different fees for early, regular, and late registrations, and you can charge different fees for different registrant classes.

Need more?

For details about setting function fees, see the Events section:

- Setting fees
- Event Function Definition - Fees window
- To define event function fees and GL information

About multi-entity and function fees

If you have enabled multi-entity in the AR/Cash setup, you can use different entities for different functions of the same event. When you hold an event that has both fundraising and non-fundraising components, you can track the income from these components separately, and you can issue registrant receipts that separate donations from other registration fees for tax purposes.

> **Note:** Note: Non-fundraising functions can be assigned any entity, but fundraising functions can only be assigned entities for which the Is Fund checkbox has been checked in System Setup.

Fundraising Online

You can collect donations online through a WCM website ("iParts for donation features") or through the Public view ("Donate now! (Public view)").

Donate now! (Public view)

You can solicit and accept online donations through the Public view of iMIS using the Gift.aspx file, which creates a simple web page for processing donations.

The Administrator can:

- Modify the page properties, such as the donation messages and eligible distributions.
- Add multiple donation pages to the Public view.

The donor can:

- Make a donation whether or not they are logged on.
- Choose from the specified donation amounts or enter an amount.
- Apply the donation to a distribution.

Each donation is considered a single gift. It can not be split within a fund or distributed among more than one fund as a split gift.

Setting up online donations in iMIS Desktop

You must be licensed for Donate to use the online donations feature.

Follow these setup steps in iMIS Desktop to enable online donations. You may have already set up these features for other parts of your iMIS system.

1. Create a payment gateway (see "Setting up card authorization") (AR/Cash > Set up module > Credit Card Auth).
2. Configure iMIS to use batch control (see "Setting up batch control") (AR/Cash > Set up module > Batch Control). Online donations are automatically placed in system-generated Internet Gifts batches that are created based on the date the transaction took place. All of the transactions from a single day are placed in a batch with the same date. If today's Internet Gifts batch is closed, and a new transaction takes place, a new batch is created with today's date.
3. Determine which distributions will be credited with online donations. Either define a new distribution (see "Defining distributions and premiums") or select from existing

distributions (Fundraising > Set up tables > Distributions and premiums).

4. (optional) Set up a Donor Club (see "Defining donor clubs") (Fundraising > Setup tables > Donor clubs > Gift Amount). A Donor Club used for online donations must be set up for cash only payment.

   Removing the Donate link from the homepage

   A link to the donation page appears on the Public view's homepage even if your organization is not licensed for the feature.

   To remove the donation link, delete the following line of code from the Default.aspx file using a text editor. In a typical installation, the Default.aspx file is located in the local directory for the iMIS application - c:\Program Files\ASI\iMIS\iMIS_public\Default.aspx.

   <a id="ctl00_TemplateBody_HyperLink6" href-
   f="Core/Donations/Gift.aspx">Donate to our organization!

   Contact records created by online donations

   After clicking the donation link in the Public view, donors are taken directly to the I want to donate page.

   The donor is able to make an online donation in three different capacities.

- Current contacts who are logged on (authenticated users) – The information from the I want to donate page is submitted to the iMIS contact's existing record.
- Current contacts who are not logged on (unauthenticated user) – The information from the I want to donate page creates a duplicate contact record for existing contacts, but it does not create a new public user record. The new contact record is assigned the default contact type (System Setup > Set up web components > Quick setup).
- Public users who are not registered on the website (anonymous user) – The information from the I want to donate page creates a new iMIS contact record, but it does not create a public user record. The new contact record is assigned the default contact type (System Setup > Set up web components > Quick setup).

Customizing Public view online donations

You can customize the online donations feature by modifying the Gift.aspx page properties and the Web.sitemap file.

Modifying the donation page

You can customize the donation page for specific purposes by modifying the Gift.aspx page properties. For example, you can change the eligible distributions, the messages displayed, or the types of payment accepted.

In a typical installation, the Gift.aspx page is located in the local directory for the iMIS application: c:\Program Files\ASI\iMIS\iMIS_public\Core\Donations\Gift.aspx. You can also use a url to see the file: http://[servername]/imispublic/Core/Donations/Gift.aspx.

> **Note:** Note: Be sure to change the default values of EmailSmtpHost and EmailFromAddress to values specific to your organization. If your SMTP server requires authentication, then you must also include values for the EmailSmtpLoginId and EmailSmtpLoginPassword properties in your Gift.aspx page.

The following Gift.aspx page has been modified for land trust donations.

```
<%@ Register TagPrefix="uc1" TagName="GiftUserControl" Src="Gift.ascx" %>

<asp:Content ID="Content1" ContentPlaceHolderID="TemplateBody" runat="server">

  <uc1:GiftUserControl runat="server" ID="GiftUserControl1"

 GiftPanelTitle="Invest in our community - make a donation now!"

      ContactPanelTitle="Donor Information"

      PaymentPanelTitle="Payment Method"

      SummaryPanelTitle="Thank you!"

      SuggestedGiftAmounts="25,50,100,250,500"

      DistributionMessage="to the following:"

      EligibleDistributions="BLDG,GEN"
```

KnownUserMessage= "Hello, {0}! Your donation will help to make our community facilities and housing affordable for the people who live and work in our town. Please select a gift amount:"

UnknownUserMessage="Welcome! Your donation will help to make our community facilities and housing affordable for the people who live and work in our town. Please select a gift amount:"

CreditDebitCardCashAccountPrefix="W_"

SubmitButtonText="Submit my donation now"

RequiredFieldDescription="* Indicates a required field"

ProcessedSuccessfullyMessage="Your donation will help us to preserve our community. Thank you for your gift."

EmailSmtpHost="yourmailservr.yourdomain"

EmailSmtpPort="25"

EmailSmtpLoginId="youremail@yourhost.yourdomain"

EmailSmtpLoginPassword="yourpassword"

EmailFromAddress="youremail@yourhost.yourdomain"

EmailConfirmationSubject="Thank you for your donation"

EmailConfirmationAddressPrompt="Send confirmation email to:" />

</asp:Content>

Gift.aspx page properties

The following Gift.aspx page properties can be modified.

ContactPanelTitle – Specifies the title of the Contact panel.

CreditDebitCardCashAccountPrefix – The default value of this property (“”) results in all iMIS Credit/Debit Cash Accounts being listed in the Pay By drop-down list. Enter your

web Credit card prefix to filter this list (from System Setup, select Set up web components > General configuration). Only Credit/Debit Cash Accounts where the Cash Account Code begins with this prefix will be populated.

DefaultCountry – Sets the default country that will appear in the Country drop-down list.

DistributionMessage – Specifies the text displayed to the left of the drop-down list of distributions.

EligibleDistributions – Specifies a comma-separated list of distribution codes. A distribution must be added to this list for it to appear on the donations web page. When the web page is rendered, each code is translated into the full distribution name and displayed in a drop-down list in the same order as the code list. Distribution codes that do not match the codes defined in iMIS will not appear online. For a list of distributions defined in your system, open the Distributions and premiums window in iMIS Desktop (from Fundraising, select Set up tables > Distributions and premiums).

EmailConfirmationSubject – Specifies the subject line in the donation confirmation email.

EmailFromAddress – Specifies the From address of the confirmation email message. Be sure to change the default value in the GIft.aspx page to one that is specific to your organization.

EmailSmtpHost – Specifies the name or IP address of the host server used for SMTP transactions. Be sure to change the default value in the GIft.aspx page to one that is specific to your organization.

EmailSmtpLoginId and EmailSmtpLoginPassword – Specifies the login credentials required for authentication on your SMTP server. These properties are not included in the Gift.aspx page by default. If your SMTP server requires authentication, then you must add these properties to your Gift.aspx page. If your SMTP server does not require authentication, then these properties should not be included in the Gift.aspx page.

EmailSmtpPort – Specifies the port used for SMTP transactions. The default is 25.

GiftPanelTitle – Specifies the title of the Gift panel.

KnownUserMessage – Specifies the message displayed when a logged-on user navigates to the donation page. If this message contains the string {0} (brace zero brace), the logged-on user's first name (Contact.FirstName) is substituted for that string. Otherwise, the message is displayed without modification.

PaymentPanelTitle – Specifies the title of the Payment panel.

ProcessedSuccessfullyMessage – Specifies the message displayed when a donation is processed successfully.

RequiredFieldDescription – Specifies the text that appears if a user fails to supply a required field. The default text is "* Indicates a required field."

SubmitButtonText – Specifies the words that appear on the button used to submit the donation. The default is "Donate!"

SuggestedGiftAmounts – This is a comma-separated list of values displayed as radio buttons for the user to select. The user also has the option to enter an amount of their choice. The values specified in this list are interpreted as decimal numbers. Any values that can't be interpreted as a decimal number (for example "xyz") will not be displayed.

SummaryPanelTitle – Specifies the title of the Summary panel. The Summary panel is displayed after the donation has been successfully processed.

ThankYouMessage – Specifies the message displayed after a donation has been successfully processed. If the message contains the string {0} (brace zero brace), the logged-on user's first name (Contact.FirstName) is substituted for that string.

UnknownUserMessage – Specifies the message displayed when a non-logged-on user navigates to the donation page.

Adding distributions to the donation page

Out of the box, no distributions appear on the donation page in the Public view. You must add one or more iMIS defined distribution codes to the EligibleDistributions property of the Gift.aspx file. From the donation web page, donors can then select which of the distributions to credit with their donation. You can also specify a distribution to be selected by default when donors visit the page.

To add distributions to the donation page

1. Using iMIS Desktop, create or find distribution codes to add to the Gift.aspx file.
   - From Fundraising, select Set up tables > Distributions and premiums.
   - Either define a new distribution or select an existing distribution to view its code.
2. Open the Gift.aspx file with a text editor. In a typical installation, the Gift.aspx file is located in the local directory for the iMIS application: c:\Program Files\ASI\iMIS\iMIS_public\Core\Donations\Gift.aspx.
3. Add the distribution codes to the EligibleDistributions property, separated by commas.

   For example: EligibleDistributions=”BLDG,GEN”
4. Save your changes to the Gift.aspx page.

   When the donation web page is rendered, each of the codes will be translated into the full distribution name and displayed in a drop-down list in the same order as the EligibleDistributions list.

To specify a default distribution code

1. Open the Web.sitemap file with a text editor. In a typical installation, the Web.sitemap file is in the local directory for the iMIS application - c:\Program Files\ASI\iMIS\iMIS_public\Web.sitemap.
2. Find the "Donate now!" siteMapNode:

   <siteMapNode title="Donate now!" url="~/Core/Donations/Gift.aspx" />
3. Append ?DistributionCode=[default distribution code] to the URL. For example, the following URL tells the donation page to open with the BLDG distribution code selected by default:

   <siteMapNode title="Donate now!" url="~/Core/Donations/Gift.aspx?DistributionCode=BLDG" />

Adding multiple donation pages

You can create multiple versions of the Gift.aspx page by saving it under a different name and modifying the page properties. Once you have created the new page, you can add it to your Public view by modifying the Web.sitemap file. In a typical installation, the Web.sitemap file is located in the local directory for the iMIS application - c:\Program Files\ASI\iMIS\iMIS_public\Web.sitemap.

The original Web.sitemap file contains the following reference to the Gift.aspx page.

```
<siteMapNode title="Donate now!" navigateChild="0" roles="*" visible="true">
   <siteMapNode title="Donate now!" url="~/Core/Donations/Gift.aspx" />
</siteMapNode>
```

To add an additional donation page to your sitemap, open the Web.sitemap file and add a siteMapNode with a title and url specific to your new page. In this example, two .aspx pages have been added to the Web.sitemap file. The sitemap can be modified to accommodate several donation pages.

```
<siteMapNode title="Donate now!" navigateChild="0" roles="*" visible="true">
   <siteMapNode title="Donate now!" url="~/Core/Donations/Gift.aspx" />
   <siteMapNode title="Invest in our community!" url="~/Core/Donations/Community.aspx" />
   <siteMapNode title="Donate to some special causes!" url="~/Core/Donations/GiftWithOtherDistributions.aspx" />
</siteMapNode>
```

Required online donation information

The required information cannot be reconfigured on the donation page. iMIS checks all required fields before accepting the donation. If the required information is not entered in the correct format, the donor receives an error message.

Required donation fields

- Donation amount
- Distribution
- First Name
- Last Name
- Email
- Authenticated users see two email fields automatically populated with the email address in the contact record. If the user enters a different default email address, iMIS updates the contact's email in the database.
- Unauthenticated users are prompted to enter their email address twice, for confirmation.
- Address 1
- City
- Country
- Payment Information

  Optional donation fields
- Prefix
- Suffix
- Company Name
- Home Phone
- Work Phone
- Address 2
- Address 3
- State/Province
- Postal Code

Default credentials sent with SMTP requests

Some SMTP servers require that the client be authenticated before the server sends e-mail on its behalf. In this case, you can include the EmailUseDefaultCredentialsProperty in the definition of the Gift.aspx control to specify that authentication uses the default credentials of the currently logged on user.

> **Note:** Note: For ASP.NET applications, the default credentials are the user credentials of the logged-on user or the user being impersonated. See the MSDN documentation for System.Net.SmtpClient Class.

Fundraising System Setup

Customers: Set up fundraising

To set up fundraising in Customer Management, you will:

- Define activity types
- Create general lookup/validation tables
- Set up fundraising options
- Add information to a customer record
- Set up matching plans in company records

Defining activity types

iMIS makes extensive use of the activity table to help you keep track of your organization's contact with individuals and other organizations. The following activity types are specific to fundraising efforts:

- REQUEST - a specific request for a donation from a donor. Requests are recorded when they occur.
- GIFT - a donation in which the donor transfers funds immediately.
- PLEDGE - a donation in which the donor promises funds, but does not transfer them immediately. Pledges can be either single or installment pledges.

- DONORCLUB - a level of recognition accorded donors based on their giving histories. The DONORCLUB activity is recorded in the customer's record each time a donor club is achieved by the customer.

> **Note:** Note: If a gift or pledge is deleted, the DONORCLUB activity is not adjusted. The Allow User Edit option must be enabled or the DONORCLUB activity cannot be modified or deleted when a gift or pledge is deleted.

Setting up REQUEST, GIFT, and PLEDGE activity types

The Fundraising activity types REQUEST, GIFT, and PLEDGE, must be set up properly to help iMIS import, track, and report on donations and requests for donations.

To set up REQUEST, GIFT, and PLEDGE Activity Types

1. From Customers, select Set up module > Activity types.
2. From Product Types, look for the appropriate item (REQUEST, GIFT, or PLEDGE).
   - If the product type is listed, select it and click Edit.
   - If the product type is not listed, click New and enter the product type in the Type text box.
3. Set the activity type values according to the reference tables following this procedure.
4. Click Save.

The Request Activity Type

Type	REQUEST
Description	Request Activity
Subtype	Distribution
Note	Notes
Eff. Date	Begin Date
Thru Date	Gift Date
Source	Appeal Code
Amount	Requested Amt.

Qty/CEU	Frequency
UF_1	List As
UF_2	Request Type
UF_3	Fund Code
UF_5	Resulting Gift
UF_6	End Date
UF_7	Last Reminder
CO_ID	Solicitor ID

The Gift Activity Type

Type	GIFT
Description	Gift Activity
Subtype	Distribution
Note	Notes
Eff. Date	Receive Date
Source	Appeal Code
Amount	Amount
Task Date	Reminder Date
UF_1	List As
UF_2	Campaign Code
UF_3	Fund Code
CO ID	Solicitor ID

The Pledge Activity Type

Type	PLEDGE
Description	Pledge Activity

Subtype	Distribution
Note	Notes
Eff. Date	Receive Date
Source	Appeal Code
Amount	Amount
Task Date	Reminder Date
UF_1	List As
UF_2	Campaign Code
UF_3	Fund Code
CO ID	Solicitor ID

General lookup/validation tables for Fundraising

There are several general lookup/validation tables to define when setting up Fundraising. See the General lookup/validation tables section for details.

APPEAL_TYPE	A code that designates a short term activity with a specific goal.	FLOODRELIEF. LEGALDEFENSE. ROOFREPAIR
EXPENSE_TYPE	A code that enables you to categorize and keep track of money spent for fundraising efforts.	PHONE. ELECTRIC. RENT. POSTAGE
FUNDRAISER_TYPE	A code that designates the type of campaign that generates a donation.	NEIGHBOR_REACH. FAMILY_FRIENDS. CORP_RACE
MEM_TRIB_ RELATIONSHIP	A code that indicates relationship of a notification contact to the honoree of a memorial/tribute donation.	SIBLING. PARENT. SPOUSE.
REQUEST_TYPE	A code that indicates what kind of	PHONE. LETTER.

	request is made.	VISIT
SOURCE_CODE	A code that indicates the marketing program or mailing that solicited a donation.	LTR_Q2_05. TELETHON

Customer - Set up Fundraising options

There are a few Fundraising options that are set from the Customer module including:

Interest Codes	Interest codes indicate specific areas that an organization or fund supports (for example, education, health, or literacy). These codes can be assigned to your organization, to funds, and to company matching plans. Specifying interest codes is optional, but if an interest code is specified in a company matching plan, matching donations can only be made to funds that have that same code. For example, if the “ED” interest code is specified for the matching plan, but the GEN fund only has the “CHILD” code, you cannot enter a matching donation to the GEN fund.
Sender Codes	Sender codes enable you to assign a signature line to requests, acknowledgements, and other correspondence that iMIS generates. For example, different letters may be signed by the head of your organization, a committee chairperson, or a customer support representative. You must define one sender code for each different signature line that you wish to include in correspondence. When a new gift is entered, the sender code can be assigned by clicking Acknowledge on the Enter and edit gifts window.

Memorial/Tribute Codes	Provides memorial/tribute codes to identify the type of memorial gift or pledge (for example, “In Memory of,” “In Tribute to,” and “In Honor of”). Memorial/tribute codes help you track memorial and tribute donations and help to generate correspondence related to these donations. Memorial/tribute codes designate how a donation is dedicated. For example, the code “MEMOR” could stand for “in memory of”, the code “HONOR” could stand for “in honor of”. When a memorial/tribute donation is made, the iMIS user who records the donation chooses from pre-defined memorial/tribute codes.

To enter interest codes

1. From Customers, select Set up Fundraising > Interest codes to display the Set up interest codes window.
2. Click New.
3. Enter the Interest Code.
4. Enter a brief Interest Description of the interest code.
5. Click Save.

To create sender codes

1. From Customers, select Set up Fundraising > Sender codes to display the Set up sender codes window.
2. Click New.
3. Enter the Sender Code.

4. Enter the Sender Description, which specifies the exact name and title to be used for the sender code. You can include a Carriage Return in the Sender Description.
5. Click Save.

To enter memorial/tribute codes

1. From Customers, select Set up Fundraising > Memorial/tribute codes to display the Set up memorial/tribute codes window.
2. Click New.
3. Enter the Memorial/Tribute Code.
4. Enter the Description of the memorial or tribute. This description is printed or included on the letters sent to the Notify ID and to the donor.
5. Click Save.

Adding solicitor data to a customer record

A solicitor is an individual who is responsible for petitioning for gifts and pledges. The solicitor typically is the staff member responsible for fundraising. However, in some organizations solicitors are volunteers, such as board members and committee members. An organization may have zero, one, or multiple solicitors.

The purpose of defining solicitors is to determine who is responsible for obtaining specific gifts and pledges and to track this information. Each person identified as a solicitor must have a record in the customer database.

> **Note:** Tip: For details about the solicitor fields, see Manage customers window - Solicitor Data tab in the Customer section.

To add solicitor data to a customer record

1. From Customers, select Manage customers to display the Manage customers window.
2. Click Find, enter the customer ID, and click Go.
3. Select the Solicitor Data tab.

4. Enter the solicitor's title in the Title field.
5. (optional) Enable the Volunteer option.
6. Enable the Solicitor option.
7. (optional) Enter the Hours/Week.
8. (optional) Enter any comments in the Comments field.
9. Click Save.

Adding fundraising information to a customer record

You can add specific fundraising information to a customer record in the Donor Data tab on the Manage customers window.

> **Note:** Tip: For details about fields on this tab, see Manage customers window - Donor Data tab in the Customers section.

To add fundraising information to a customer record

1. From Customers, select Manage customers to display the Manage customers window.
2. Click Find, enter the customer ID, and click Go.
3. Select the Donor Data tab.
4. Select the Solicitor from the drop-down list.
5. (optional) Enable the Do not phone option.
6. (optional) Enable the Do not email option.
7. (optional) Enable the Do not solicit option.
8. (optional) Enable the Do not sell option.
9. (optional) Select the Preferred Distribution or Premium to be associated with this customer from the drop-down list. (This information is used only when this customer is being honored with a memorial or tribute.)

10. (optional) Enter the List as information, or click Anonymous to display Anonymous in the List as field.

    Note: The List as information does not affect how invoices are printed for this customer. Most reports include both the full name and the List as information.

    Note: The List as information on the Donor Data tab on the Manage customers window specifies how the customer is listed unless you override the List as information in the Enter and edit gifts window. If you override the List as information in the Enter and edit gifts window, this override only affects that particular gift. All future gifts default to the List as information defined in the Donor Data tab on the Manage customers window.

11. Select a Receipting Interval. The default is None.

12. Click Save.

Adding notification information to a customer record

When your organization receives a memorial or tribute, you must notify the honoree's family members and business associates that a donation has been made. Before you can notify the family or friend, you must create a list of individuals to be notified in the honoree's record.

Enter notification information in the honoree's customer record in the Notification tab on the Manage customers window.

Tip: For details about using the fields on this window, see these topics in the Customers section:

- Managing notification information
- To enter notification information
- To edit notification information
- To delete notification information
- Manage customers window - Notification tab

To enter notification information for a customer record

1. From Customers, select Manage customers to display the Manage customers window.
2. Click Find, enter the customer ID, and click Go.
3. Select the Notification tab.
4. On a blank row in the Notification tab, enter the Notify ID.
5. (optional) Select the Memorial/Tribute Code from the drop-down list.
6. (optional) Select the Relationship from the drop-down list.
7. (optional) Select the Salutation Code from the drop-down list.
8. (optional) Select the Merge Code from the drop-down list.
9. (optional) Select the Sender Code from the drop-down list.
10. Click Save.

To search for a Notify ID

1. From Customers, select Manage customers to display the Manage customers window.
2. Click Find, enter the customer ID, and click Go.
3. Select the Notification tab.
4. Click the blank Notify ID field and then click the down arrow to display the Find ID window.
5. Find and select the desired ID, then click OK. The Notify ID field is populated with the selected ID.

Creating matching plans in company records

You will need to set up a matching plan for the company before entering a matching gift. Typically, the matching plan is set as a percentage of the gifts within a specified date range or amount range made by company employees. For example, Company ABC matches 50 percent of employee gifts that range from $10 to $100. Interest codes can also optionally be assigned to the company's matching plans. If interest codes are assigned to a matching plan, at least one of the interest codes assigned to the matching plan must exist in the fund where a matching donation is made.

Matching plans are defined on the Matching Plans tab on the Manage customers window. All matching plans created for the company record display on the Matching Plans tab on the company's Manage customers window.

> **Note:** Note: The Matching Plans tab is only enabled for company records.

Need more?

For details about matching plans, see these topics in the Customer section:

- Manage customers window - Matching Plans tab
- To create a matching plan

To create a matching plan

1. From Customers, select Manage customers to display the Manage customers window.
2. Click Find, enter the company ID, and click Go.
3. Select the Matching Plans tab.
4. Enter the percentage of the matching contribution in the Match % field.
5. (optional) Enter the minimum contribution needed to qualify for the matching plan in the Minimum Contribution field.
6. Enter the maximum contribution that qualifies for the matching plan in the Maximum Contribution field.
7. (optional) Enter the start and end dates for the matching plan in the Start Date and End Date fields. If no Start Date is specified, the matching plan is effective immediately. If no End Date is specified, the matching plan is effective until it is deleted.
8. (optional) Click Interest Codes to display the Interest Codes window. Select one or more interest codes and click OK.
9. (optional) Enter the Form Number associated with the matching plan.

10. (optional) Enter any Notes associated with the matching plan.
11. Click Save.

Fundraising: Set up module

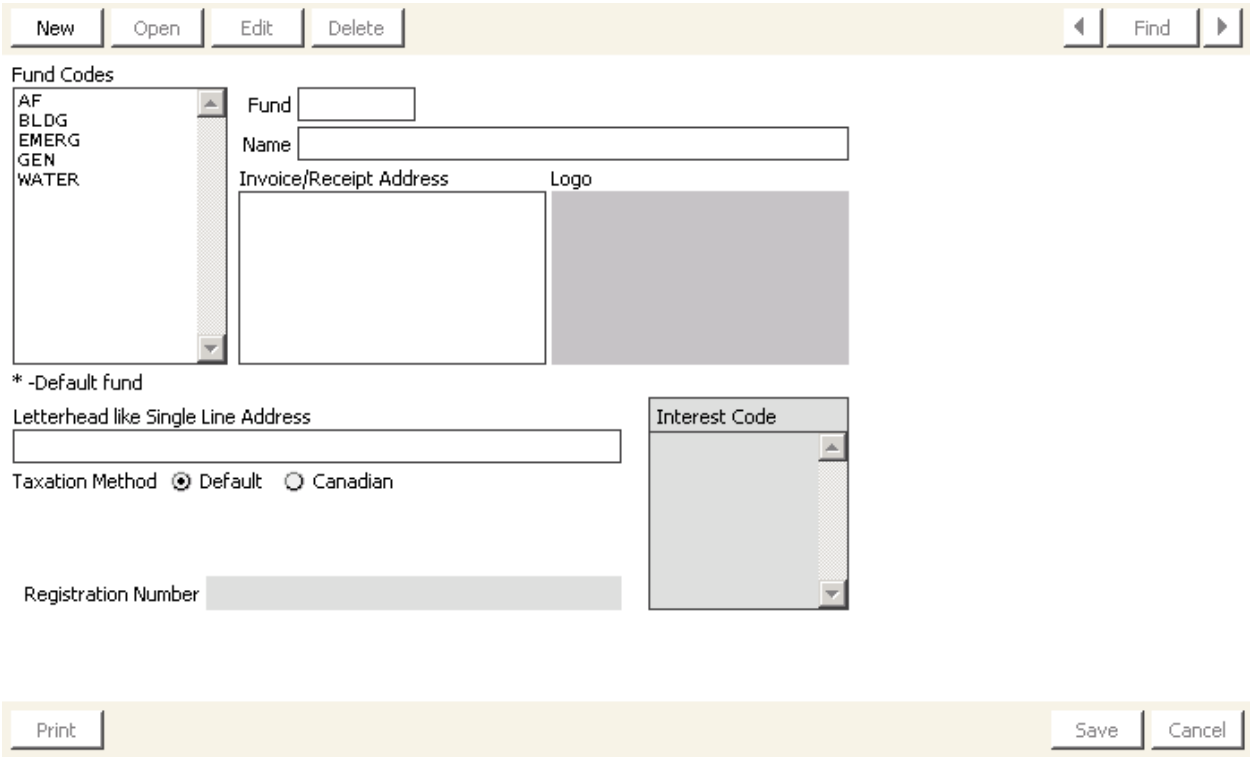
Fundraising setup overview

With iMIS Fundraising, you can create a customized fundraising management system for entering and tracking fundraising gifts and pledges. You can create several types of tracking categories such as funds, appeals, and campaigns.

Designating your organization as a fund

If your organization is small and does not use multiple funds, you can designate your organization as a fund in your system setup. If you use more than one fund, you must define the individual funds that you use.

Set up funds window



Admin Console: Configure > Fundraising > Set up tables > Set up funds

Desktop: Fundraising > Set up tables > Funds

Fund Codes

Lists all currently defined fund codes.

Fund

Designates the currently selected or the new fund code.

Name

Designates the full name of the organization or fund.

Invoice/Receipt Address

Designates the mailing address of the fund.

Logo

Designates the fund's logo that will be used on reports that include the logo.

Letterhead like Single Line Address

Designates the fund's letterhead if it is a single line address line.

Interest Code

(optional) Enter the interest codes associated with the fund.

Taxation Method

Designates the taxation method used for this organization/fund. Choose one of the following options:

- Default - Uses the default taxation method defined in system setup.
- Canadian - Uses the Canadian taxation method. This method requires the following additional fields:
- Tax Authority - The Canadian tax authority.
- GST/HST Remittance # - The GST/HST Remittance number.

Note: Note: Canadian taxation (see "Canadian Taxation (GST and HST)") requires additional configuration.

Registration Number

(optional) Designates the registration number associated with the fund. The registration number is used with the Fundraising receipting function.

To designate your organization as a fund

1. Select File > System Setup to open the System Setup window.
2. Click the Organization Names button to open the Organization Names window.
3. Select an item from the Org Codes list.
4. Click Edit.
5. Check the Is Fund checkbox.
6. Enter the Registration Number associated with the organization if applicable.
7. Click Save.

Defining funds

Funds are the entities within your organization that serve as asset accounts for your fundraising activities. Frequently, for legal and accounting reasons, an organization must maintain separate accounting records for each fund.

In iMIS, a fund is an organization. Gifts and pledges are directed to a fund (for example, a capital fund, a fixed asset fund, or a general unrestricted fund).

Information that is entered in the Set up funds window is displayed in the Organization Names window. Entities that have the Is Fund option enabled in the Organization Names window are also displayed in the Set up funds window.

Note: Note: If you add a fund, restart iMIS to enable access to the new fund information.

Note: Caution! Do not delete funds after you have completed fundraising transactions. Deleting funds affects the completed transactions. If you delete a fund, you

must manually delete the fund from the appeals, campaigns, distributions, and donor levels associated with the fund.

To define a fund

1. From Set up funds window, click New.
2. Enter the Code for the fund.
3. Enter the Name of the fund
4. (optional) Enter the fund's Invoice/Receipt Address.
5. (optional) Paste the fund's Logo if available.
6. (optional) Enter the Letterhead like Single Line Address if applicable.
7. Select the appropriate Taxation Method option.
8. (Canadian taxation only) Enter the Tax Authority.
9. (Canadian taxation only) Enter the GST/HST Remittance #.
10. (optional) Add any interest codes to be associated with the selected fund in the Interest Code field, or press Ctrl+L to select interest codes.
11. Click Save.
12. Restart iMIS.

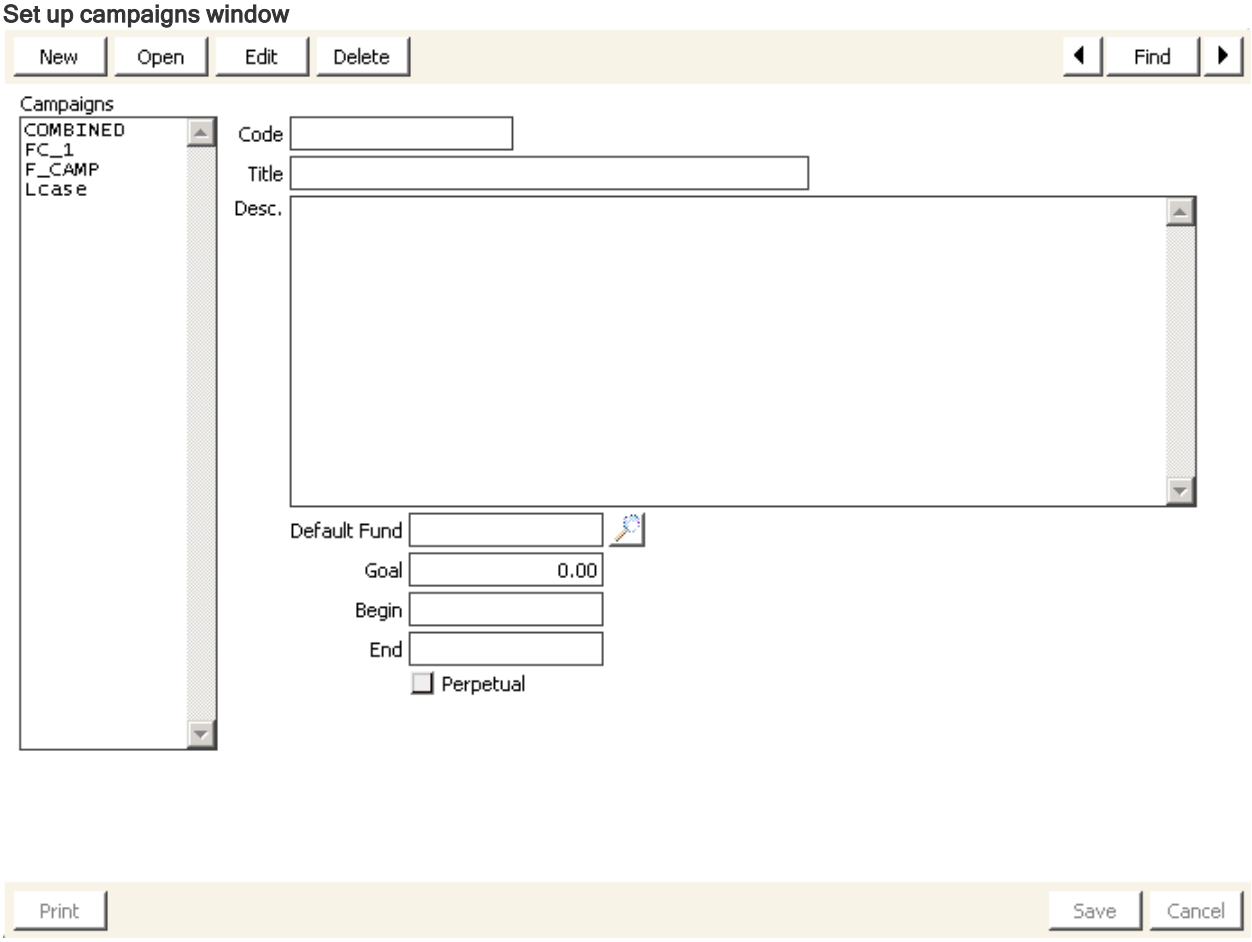
Note: Note: If you defined a fund as the default organization in the Organization Names window, the fund will have an asterisk next to it in the Org Codes scrolling list indicating that it is the default fund (and the default organization).

Defining fundraising campaigns

A campaign is a series of activities designed to generate money for a specific goal or objective. You may have a capital campaign with a goal of $1 million for a new building, or a scholarship campaign with a goal of $50,000 for a new scholarship. Campaigns are not

required by iMIS, and not all organizations use them. However, campaigns are useful for generating and tracking money that is targeted for a specific goal.

Set up campaigns window



Admin Console: Configure > Fundraising > Set up tables > Set up campaigns

Desktop: Fundraising > Set up tables > Campaigns

Campaigns

Lists all currently defined campaigns.

Code

Designates the campaign code of the currently selected or new campaign.

Title

Designates the title of the campaign.

Desc

Describes the campaign.

Default Fund

Designates the default fund for the campaign.

Goal

Designates the campaign's financial goal.

Begin

Designates the campaign's starting date.

End

Designates the campaign's ending date.

Perpetual

When checked, indicates the campaign does not have an end date.

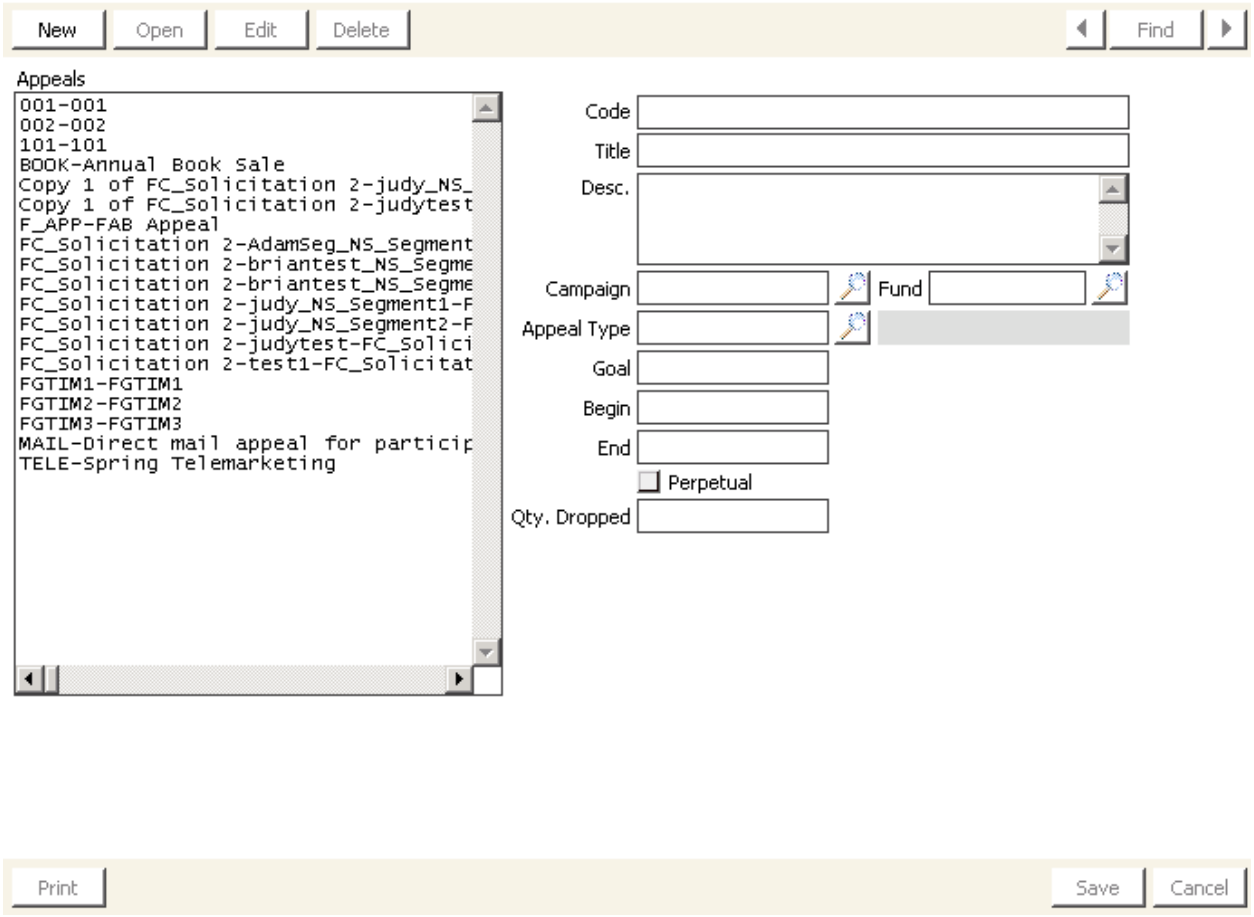
To define a campaign

1. From Set up campaigns window, click New.
2. Enter a descriptive alphanumeric Code to identify the campaign.
3. Enter the full Title of the campaign.
4. (optional) Enter a detailed description of the campaign in the Desc field.
5. (optional) Enter the Default Fund code for the campaign, or click the lookup icon to select a fund code.
6. (optional) Enter the financial Goal for the campaign.
7. Optional) Enter the starting date for the campaign in the Begin field.
8. (optional) Enter the predetermined End date for the campaign, or enable the Perpetual option if the campaign is ongoing.
9. Click Save.

Defining fundraising appeals

An appeal is a short-term activity, such as a mass mailing, a telephone solicitation, or a fax blitz, that may be connected to a particular campaign or fund. Appeals are not required in Fundraising. You can define any number of appeals, depending upon your organization's needs. Define appeals in the Set up appeals window.

Set up appeals window



Admin Console: Configure > Fundraising > Set up tables > Set up appeals

Desktop: Fundraising > Set up tables > Appeals

Appeals

Lists all currently defined appeals.

Code

Enter an alphanumeric code for the selected appeal.

Title

(optional) Enter the full title of the appeal.

Desc.

(optional) Enter a detailed description of the appeal.

Campaign

(optional) Enter the campaign associated with the appeal.

Fund

(optional) Enter the fund associated with the appeal.

Appeal Type

(optional) Enter the type of appeal. Appeal types are defined in the APPEAL_TYPE lookup table (from Customers, select Set up tables > General lookup/validation, and select APPEAL_TYPE).

Goal

(optional) Enter the appeal's financial goal. When you enter a monetary value, iMIS automatically formats the value with the appropriate commas. For example, if you enter 1000000 (one million) in the Goal field, iMIS automatically formats the value as “1,000,000.00” when you tab out of the field.

Begin

(optional) Enter the appeal's begin date.

End

(optional) Enter the appeal's end date.

Perpetual

(optional) Enable to specify that the appeal is ongoing.

> **Note:** Note: You cannot enable the Perpetual option if the appeal is associated with a campaign that has a specific end date. You may have to update the information in the Set up appeals window more frequently than in the Set up funds window (from Fundraising, select Set up tables > Funds) or the Set up campaigns window (from Fundraising, select Set up tables > Campaigns) if you conduct several appeals during the year.

Qty Dropped

Enter the quantity dropped for the appeal. This allows you to gauge the response rate to an appeal.

Premiums

Click this button to open the Appeal Premiums dialog and apply a premium against the appeal.

To define an appeal

1. From Set up appeals window, click New.
2. Enter a unique alphanumeric Code for the appeal.
3. (optional) Enter a descriptive Title for the appeal.
4. (optional) Enter a detailed Description of the appeal. This description displays only in the Set up appeals window.
5. (optional) Enter the Campaign to which this appeal belongs, or click the lookup icon and select a campaign.
6. (optional) Enter the Fund to which this appeal belongs, or click the lookup icon and select a fund.
7. (optional) Enter the Appeal Type, or click the lookup icon and select an appeal type.
8. (optional) Enter the Goal for the appeal.
9. (optional) Enter the date that the appeal starts in the Begin field.

10. (optional) Enter the date that the appeal ends in the End field, or enable the Perpetual option if the appeal is ongoing.
11. (optional) Enter the quantity dropped for the appeal in the Qty Dropped field.
12. (optional) Click Premiums to apply a premium to the appeal.
13. Click Save.

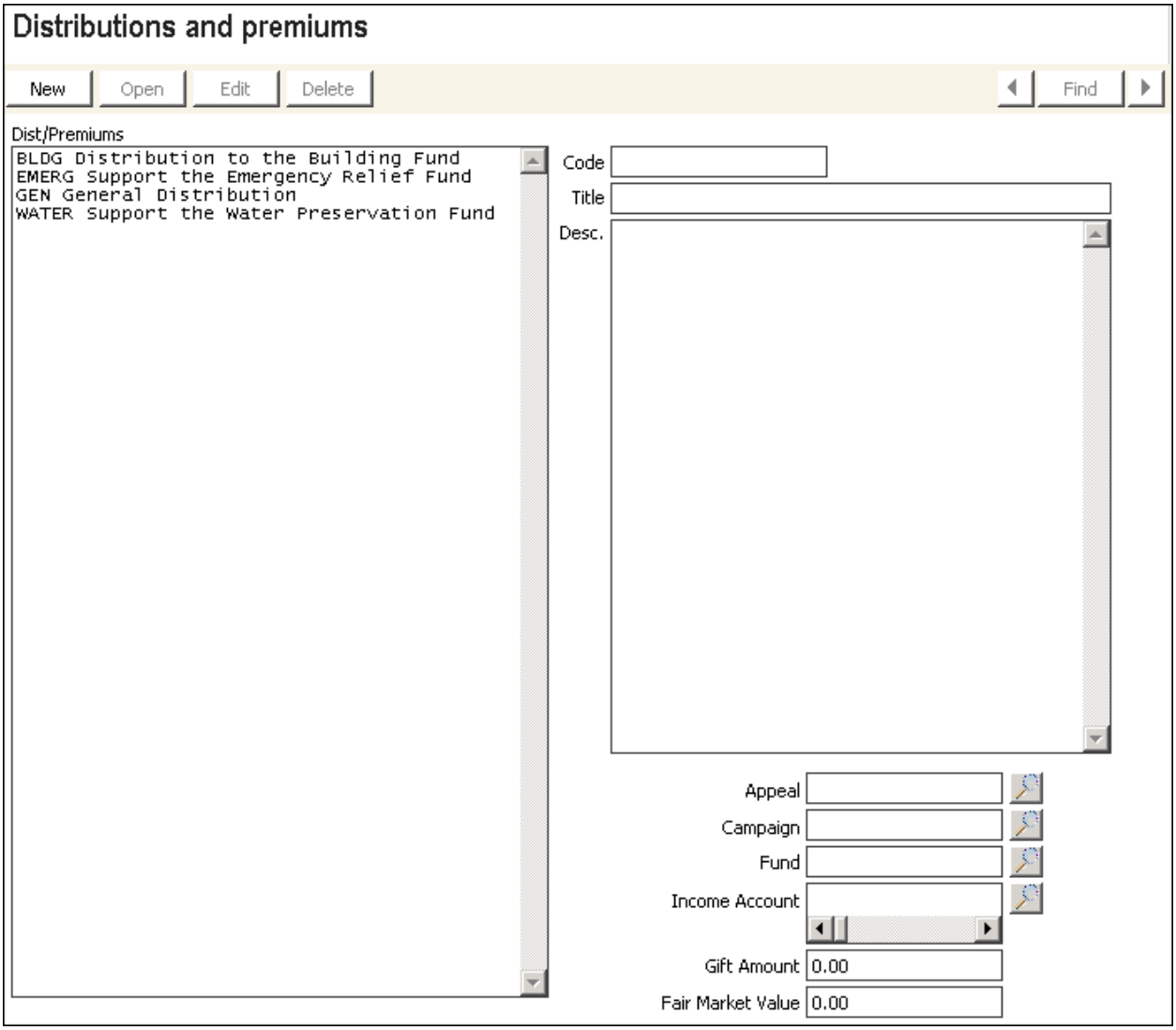
Defining distributions and premiums

Before you enter gifts and pledges, you must define the distributions or premiums that are to be credited with the contributions. Distributions allow you to predefine combinations of funds, campaigns, and appeals. When a gift is received, it is usually distributed among a fund, a campaign, and an appeal. A distribution does not have to include a campaign or an appeal, but it must include a fund. If you use a general ledger system, the distribution also determines the general ledger income account to be credited.

A premium is a complimentary gift, such as a coffee mug or T shirt, that is given to a contributor who makes a donation. A premium is a distribution with a fair market value. A premium also has a gift value. For example, the fair market value for a coffee mug may be only $4, but the donor may be required to donate at least the gift value of $25 to receive the coffee mug.

Distributions and premiums are defined in the Set up distributions and premiums window.

Set up distributions and premiums window



Admin Console: Configure > Fundraising > Set up tables > Set up distributions and premiums

Desktop: Fundraising > Set up tables > Distributions and premiums

Dist/Premiums

Lists currently defined distributions and premiums.

Code

Designates an alphanumeric code for the selected distribution or premium.

Title

Designates a descriptive title for the distribution or premium.

Desc

Specifies a detailed description of the distribution or premium.

Appeal

Specifies the appeal associated with the distribution or premium.

Campaign

Specifies the campaign associated with the distribution or premium.

Fund

Specifies the fund associated with the distribution or premium.

Income Account

Specifies the general ledger income account to be credited with contributions recorded with the distribution.

Gift Amount

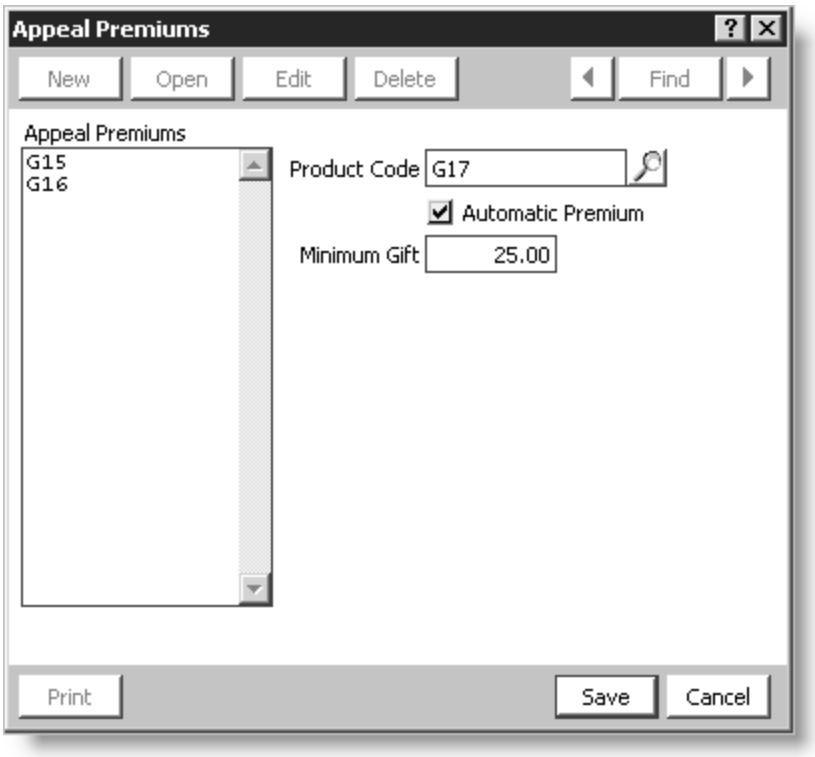
(Used only for premiums) Specifies the usual amount of the gift or pledge associated with the premium. This is the amount of money the donor must contribute to receive the premium.

Fair Market Value

(Used only for premiums) Specifies the fair market value of the premium. For example, if the premium is a coffee mug that sells for $4, but a donor receives the mug for a $20 gift, $4 is the fair market value.

Appeal Premiums window

You can apply a premium against an appeal code to establish rules about which premium is given for a specific gift amount. For example, a gift of $10 will provide a key chain, a gift of $ 25 will provide a mug. Appeal premiums are created and assigned to products on the Appeal Premiums window.



From Fundraising, select Set up tables > Appeals, highlight an Appeal and click Premiums

Note: Note: To display the Premiums button in the Appeals window, you must enable the setup option to Allow Premiums as Products (Fundraising > Set up module).

Creating appeal premiums

Appeal Premiums is the product selected for the premium.

Product Code is the product associated with the Appeal premium. The Premium option must be enabled on the Manage Products window for the product to appear in this list (Orders > Manage inventory > Manage products).

Automatic Premium controls options on the Enter and edit gifts window.

- If enabled, the premium will automatically attach.
- If disabled, the Show all premiums option is available and you can attach a general item from inventory.

  Minimum Gift sets the minimum amount required to apply the premium.

  To define a distribution or premium

1. From Set up distributions and premiums window, click New.
2. Enter a unique alphanumeric Code (five characters maximum) for the distribution or premium.
3. (optional) Enter the Title of the distribution or premium.
4. (optional) Enter the description of the distribution in the Desc field.
5. (optional) Enter the Appeal associated with the distribution or premium, or click the lookup icon and select an appeal.
6. (optional) Enter the Campaign associated with the distribution or premium, or click the lookup icon and select a campaign.
7. Enter the Fund to be identified with the distribution or premium, or click the lookup icon and select a fund.
8. (optional) Enter the general ledger Income Account to be credited with contributions recorded with the distribution or premium, or click the lookup icon and select an account.
9. (Premiums only) Enter the usual amount of the gift or pledge in the Gift Amount field. This is the amount the contributor must donate in order to qualify for the premium.
10. (Premium only) Enter the fair market value of the contribution in the Fair Market Value field.
11. Click Save.

Defining donor clubs

Many fundraising organizations establish donor clubs to recognize various levels of giving by donors. For example, for contributions of $10,000 or more, the organization may

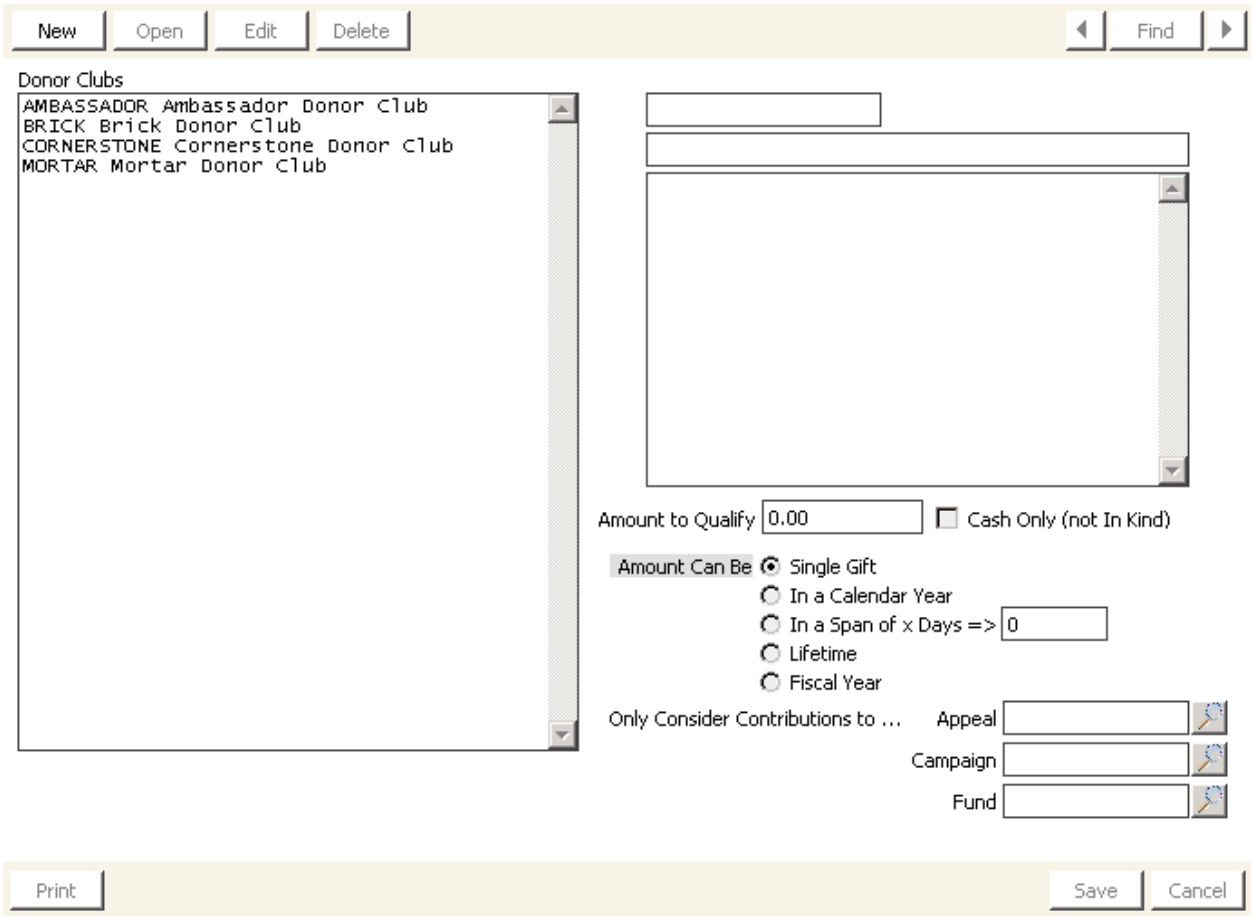
designate a donor as a “friend,” and for $20,000 or more, a donor may be designated as a “benefactor.” Not all organizations use donor clubs, but if your organization does, iMIS makes it easy to record and track donations and donor clubs.

iMIS automatically determines whether a donor club is attained with each gift entry. If you define a donor club at $20 for a single gift, and a contributor donates $20 or more, the contributor automatically attains the donor club.

When generating a Donor Club Detail report, the highest donor club achieved by an individual within the same criteria as defined in the Set up donor clubs window supersedes any lower donor club (if Superseded was entered in one of the user-defined fields on the Set up activity types window (from Customers, select Set up module> Activity types) when setting up the DONORCLUB activity type).

However, such a donor club does not supersede a donor club that was achieved under different parameters. For example, an individual makes a $1,000 cash contribution, which qualifies the donor for the Diamond Donor Club. The Diamond Donor Club requires a cash-only contribution of at least $1,000. The donor also qualifies for the Silver and Gold Donor Clubs, which require cash-only contributions of $100 or $500, respectively. The Diamond Donor Club supersedes the Silver and Gold, and only the Diamond Donor Club prints on the Donor Club Detail report. However, the contributor also qualifies for the Patron Donor Club, which requires a $500 gift, but does not require cash-only contributions. Both the Diamond and Patron Donor Clubs print on the Donor Club Detail report.

Set up donor clubs window



Admin Console: Configure > Fundraising > Set up tables > Set up donor clubs

Desktop: Fundraising > Set up tables > Donor clubs

Donor Clubs

Displays all currently defined donor clubs.

Code

Designates an alphanumeric code for the current donor club.

Title

Designates a title for the donor club.

Desc

Specifies a description of the donor club.

Amount to Qualify

Specifies the monetary value of donation needed to qualify for the donor club.

Cash Only (not In Kind)

Check this box to limit qualifying gifts to cash. When this box is cleared, pledges and or in-kind gifts are also eligible.

Amount Can Be

Designates whether the total of multiple gifts is used to qualify for donor club membership, and if so, what time span is used to calculate total giving.

- Single Gift - Specifies that only single gifts can qualify donor club membership.
- In a Calendar Year - Specifies that the sum of a donor's contributions made during a calendar year is the amount used to determine donor club membership.
- In a Span of x Days=> - Specifies that the sum of a donor's contributions made during the last X days is the amount used to determine donor club membership.
- Lifetime - Specifies that the sum of all contributions a donor has ever made is the amount used to determine donor club membership.
- Fiscal Year - Specifies that the sum of a donor's contributions made during the fiscal year, as defined in the AR/Cash module, is the amount used to determine donor club membership.

Only Consider Contributions to

Specifies if donations must be associated with a particular fundraising effort in order to qualify for donor club membership. If all items are left blank, all otherwise qualified donations are eligible. If one or more of the following items is specified, only donations that are associated with all of the specified codes are considered when determining donor club membership.

- Appeal - Specifies an appeal code with which qualifying donations must be associated.
- Campaign - Specifies a campaign code with which qualifying donations must be associated.
- Fund - Specifies a fund code with which qualifying donations must be associated.

To define donor clubs

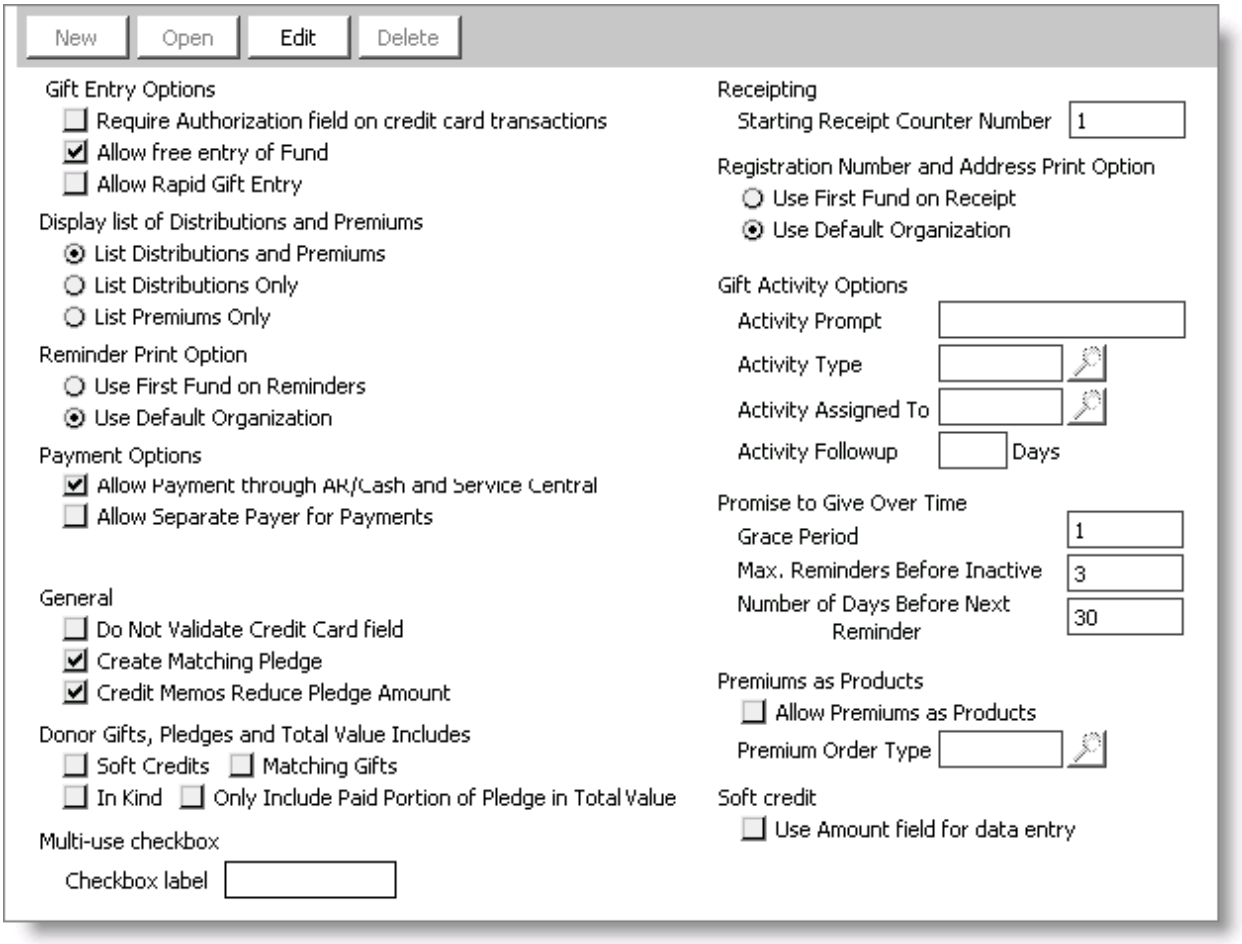
1. From Set up donor clubs window, click New.
2. Enter a unique alphanumeric Code (five characters maximum) for the donor club.
3. (optional) Enter the Title of the donor club. This is the title that will print on thank you letters to donor club members.
4. (optional) Enter a short description of the donor club in the Desc field.
5. Enter the amount needed to qualify for this particular donor club in the Amount to Qualify field.
6. (optional) Enable the Cash Only option for the donor club to be achieved only with cash gifts and not pledges or in-kind gifts.
7. Select a receipt period option for the gift or pledge in the Amount Can Be field.
8. (optional) In the Only Consider Contributions to area, enter the appropriate code or combination of codes if the donor club can only be achieved with a contribution to a specific appeal, campaign, or fund.
9. Click Save.

Defining fundraising setup options

Use the Fundraising Set up module window to:

- Select gift entry options
- Determine how distributions and premiums will display on the Enter and edit gifts window
- Select printing options
- Select payment options
- Set receipt printing options

Configure fundraising options window



Admin Console: Configure > Fundraising > Configure fundraising options

Desktop: Fundraising > Set up module.

Gift Entry Options

You may check any of the following boxes:

- Require Authorization field on credit card transactions - Enable to make the Authorization field a required field on every credit card transaction entered in the Enter and edit gifts window or the Process payments window.
- Allow free entry of Fund - Enable to freely match distributions and funds at gift entry. This allows you to determine on a case-by-case basis how the gift should be distributed. If you do not enable this option, you must define all valid combinations of funds and

distributions. Users can still overwrite the Campaign and Appeal fields even if the Allow free entry of Fund option is not enabled.

- Allow Rapid Gift Entry - Enable to give users the ability to enter Date Received, Gift Type, Gift Amount, Distribution, Appeal, Campaign, and Fund once on the Enter and edit gifts window and have these fields automatically entered in additional records. When this option is checked, the buttons Enable Rapid Gift Entry and Disable Rapid Gift Entry are available to users.

> **Note:** Note: The Single Gift and Single Pledge gift types are the only gift types supported for rapid gift entry. If the gift type is Installment, an error message displays when you click Enable Rapid Gift Entry.

- Date Received
- Gift Type
- Gift Amount
- Distribution
- Appeal
- Campaign
- Fund
- Installment gifts
- Acknowledgements
- Split gifts
- Memorials/TributesNotes
- Matching plans
- Inserting or editing soft credits (you can enter an existing soft credit ID, but you cannot create a new soft credit ID or edit an existing soft credit ID)

Display list of Distributions and Premiums

You must choose one of the following options:

- List Distributions and Premiums - Enable to display distributions and premiums in the Enter and edit gifts window (from Fundraising, select Enter and edit gifts).

- List Distributions Only - Enable to display only distributions in the Enter and edit gifts window.
- List Premiums Only - Enable to display only premiums in the Enter and edit gifts window.

Reminder Print Option

You must choose one of the following options:

- Use First Fund on Reminders - Enable to print the name of the first defined fund in the title of all reminders and reports. If there is only one fund, the name of this fund prints on reminders and reports.
- Use Default Organization - Enable to print the name of the default organization in the title of all reminders and reports.

Payment Options

You may check any of the following boxes:

- Allow Payment through AR/Cash and Service Central

Enabled

Allows fundraising payments through both the Service Central Enter and edit payments window and the AR/Cash Enter and edit cash receipts window. This is helpful if you receive payments for multiple products and some of those products are not related to fundraising.

Disabled

Prevents viewing Fundraising invoices on:

- Service Central Process customer requests window
- Service Central Enter and edit payments window
- AR/Cash Cash receipts window (AR/Cash > Enter and edit transactions > Cash receipts)

Note: If disabled, staff can only make fundraising payments through the Fundraising Process payments window.

- Allow Separate Payer for Payments - Enable to allow a separate payer for payments made in the Process payments window. If this option is enabled, you can specify a different payer ID for a pledge made by another individual.
- Payer Label - Enter the label that will be displayed for the separate payer field on the Process payments window. If you leave this field blank, the default label is Payer. Displays only if the Allow Separate Payer for Payments option is enabled.

  General

  You may check any of the following boxes:

- Do Not Validate Credit Card field - Enable to disable the credit card format validation feature when entering gifts in the Enter and edit gifts window and when making payments in the Process payments window or the AR/Cash Enter and edit cash receipts window.

  Note: When setting up the Fundraising module for Credit Card Authorization, we recommend disabling the Do Not Validate Credit Card field option on the Fundraising Set up module window. If the Do Not Validate Credit Card field option is enabled, the credit card number will not be formatted automatically when it is entered on the Fundraising Enter and edit gifts window. If the Deferred Authorization option is enabled on the AR/Credit Card Authorization window, transactions made on the Enter and edit gifts window with unformatted credit card numbers will not display in credit card searches and will not print on the Deferred Credit Card Pre-Authorization report.
- Create Matching Pledge - Enable to record matching gifts as pledges rather than requests.
- Credit Memos Reduce Pledge Amount - Enable if you want credit memos to reduce a pledge amount. For example, if you pledge $100 and you write off $25 of the pledge, iMIS will recalculate the pledge as $75 and display $75 in the Fundraising History window if the Credit Memos Reduce Pledge Amount option is enabled. However, if this option is disabled and you pledge $100 and write off $25 of the pledge, iMIS will display the pledge amount as $100 with a $25 credit in the Fundraising History window.

  Donor Gifts, Pledges and Total Value Includes

You may check any of the following boxes:

- Soft Credits - Include donation amounts not made by the contact, but made because of the contact.
- Matching Gifts - Include matching gift amounts provided by someone other than the donor.
- In Kind - Include the value of non-cash contributions
- Only Include Paid Portion of Pledge in Total Value - Include the amount actually received from pledges, not the total amount promised.

Multi-use checkbox

You can create a User Defined field to flag a gift record. Use the multi-use Checkbox label field to label the generic checkbox on the Enter and edit gifts window (Fundraising > Enter and edit gifts). This field will appear on the Enter and edit gifts window only if you have entered a label for the Checkbox label field.

Receipting

- Starting Receipt Counter Number - (optional) Enter the next receipt number to be automatically generated. The default for the initial counter number is 1. After you generate receipts, the counter increases the number incrementally by 1 for each printed receipt. You can manually change the counter value to a higher number, but not to a lower number. Automatically generated receipt numbers are not duplicated.

Registration Number and Address Print Option

You must choose one of the following options:

- Use First Fund on Receipt - Enable to print the name of the first fund the donor contributed to when donating to multiple funds on the receipt header.
- Use Default Organization - Enable to print the name and address of the default fundraising organization on all receipt headers. When this option is enabled, receipts aggregate by donor ID, even if the payments are to funds with different registration numbers.

Gift Activity Options

The fields in this area are used to specify a user-specified activity that can be created when a gift or pledge is entered or edited.

- Activity Prompt - Enter the prompt for the activity checkbox on the Enter and edit gifts window.
- Activity Type - Enter the activity type for the activity that is created when the activity checkbox is enabled on the Overview tab on the Enter and edit gifts window, or select the lookup icon and select the activity type from the drop-down list.
- Activity Assigned To - Enter the iMIS user who will be assigned the activity, or select the lookup icon and select the iMIS user from the drop-down list.
- Activity Followup - Enter the time (in days) between the gift or pledge entry and the follow-up action.

Promise to Give Over Time

- Grace Period - Enter the number of days beyond the end date that requests with a status other than Active continue to display in the Manage requests window. The default grace period is 1 day.
- Max Reminders Before Inactive - Enter the number of reminders before the request status is changed to Inactive. The default value is 3.
- Number of Days Before Next Reminder - Enter the minimum number of days between the printing of reminder notices for a request. The default value is 30 days.

Premiums as Products

- Allow Premiums as Products - When checked, products can be used as premiums. You can set up stock, non-stock, and kit products so that they can be used as premiums for gifts and pledges with the added benefit of inventory control.

  Note: You must have the Full Order Entry module, and all products that are to be used as premiums must be set up for use as premiums on the Orders Manage products window.
- Premium Order Type - Designates the order type for products used as premiums.

Soft Credit

Select the Use Amount field for data entry option if you want iMIS to automatically calculate the amount as a percentage of the entire donation.

To define default Fundraising options

1. From Configure fundraising options window, click Edit.
2. Select one or more of the Gift Entry Options checkboxes.
3. Select one of the Display list of Distributions and Premiums options.
4. Select one Reminder Print Option.
5. (optional) Select one or more of the Payment Options checkboxes.

- If you checked the Allow Separate Payer for Payments box, fill in the Payer Label field.

6. (optional) Select one or more of the General checkboxes.
7. (optional) Select one or more of the Donor Gifts, Pledges and Total Value Includes checkboxes.
8. (optional) Enter the Starting Receipt Counter Number.
9. Select one of the Registration Number and Address Print Options.
10. (optional) Enter Gift Activity Options.
11. (optional) Enter Promise to Give Over Time Options.
12. (optional) Configure Premiums as Products options.
13. Click Save.

Enabling rapid gift entry in Enter and edit gifts window

Rapid gift entry field values are retained on a per-session basis. All of the field values that were retained for rapid gift entry are cleared if you disable rapid gift entry (click Disable Rapid Gift Entry), open another window, or restart iMIS. You must populate the rapid gift entry fields with the appropriate values before clicking Enable Rapid Gift Entry each time you use rapid gift entry.

Rapid Gift Entry will not be available if:

- Batch Control is disabled.
- Organization is not licensed for Fundraising.
- iBO Rapid Gift Entry is turned off via .NET security.

  A .NET Fundraising security group is created during install. Users with Fundraising security level 3-8 will be added to this group.

  Note: Note: Since the Installments tab is disabled during rapid gift entry, the installment date for a single pledge is set to the transaction date and cannot be changed.

- Date Received
- Gift Type
- Gift Amount
- Distribution
- Appeal
- Campaign
- Fund
- Installment gifts
- Acknowledgements
- Split gifts
- Memorials/Tributes notes
- Matching plans
- Inserting or editing soft credits (you can enter an existing soft credit ID, but you cannot create a new soft credit ID or edit an existing soft credit ID)

Note: Note:

Note: Split gifts require a fund. Split gifts must be split between or among multiple funds or within one fund. You can designate only one appeal or campaign for each gift/pledge entry.

> **Note:** If Allow Free Entry of Fund is disabled in Fundraising > Setup Module, you will not be able to edit the fund.

Fundraising authorization levels

Set up authorization levels for users according to your organization's needs.

Authorization levels for pledge credit and debit memos

Fundraising authorization level of 1 or higher lets you find and view existing pledge credit or debit memos.

Fundraising authorization level of 3 or higher lets you enter new pledge credit or debit memos. You can also edit or delete pledge credit or debit memos that you have entered with a Fundraising authorization level of 3 or higher.

Fundraising authorization level of 4 or higher lets you edit or delete pledge credit or debit memos entered by other iMIS users.

Setting up fundraising accounting

To implement Fundraising, you will make a few modifications and additions to iMIS AR/Cash.

Setting up fundraising in AR/Cash

After you have defined your funds, you will set up fundraising in AR/Cash.

> **Note:** Tip: If you are using multiple entities, see Configuring multi-entity processing in the AR/Cash Administration section.

Implementing Fundraising requires a few modifications and additions to your existing AR/Cash system. These changes are necessary for the successful use of the Fundraising module.

> **Note:** Note: Before you can set up AR/Cash to accommodate Fundraising, you must first define your funds.

Determining transaction entity ownership

Each transaction generated within iMIS is made up of two or more transaction entry lines. Each individual transaction line can be one of the following:

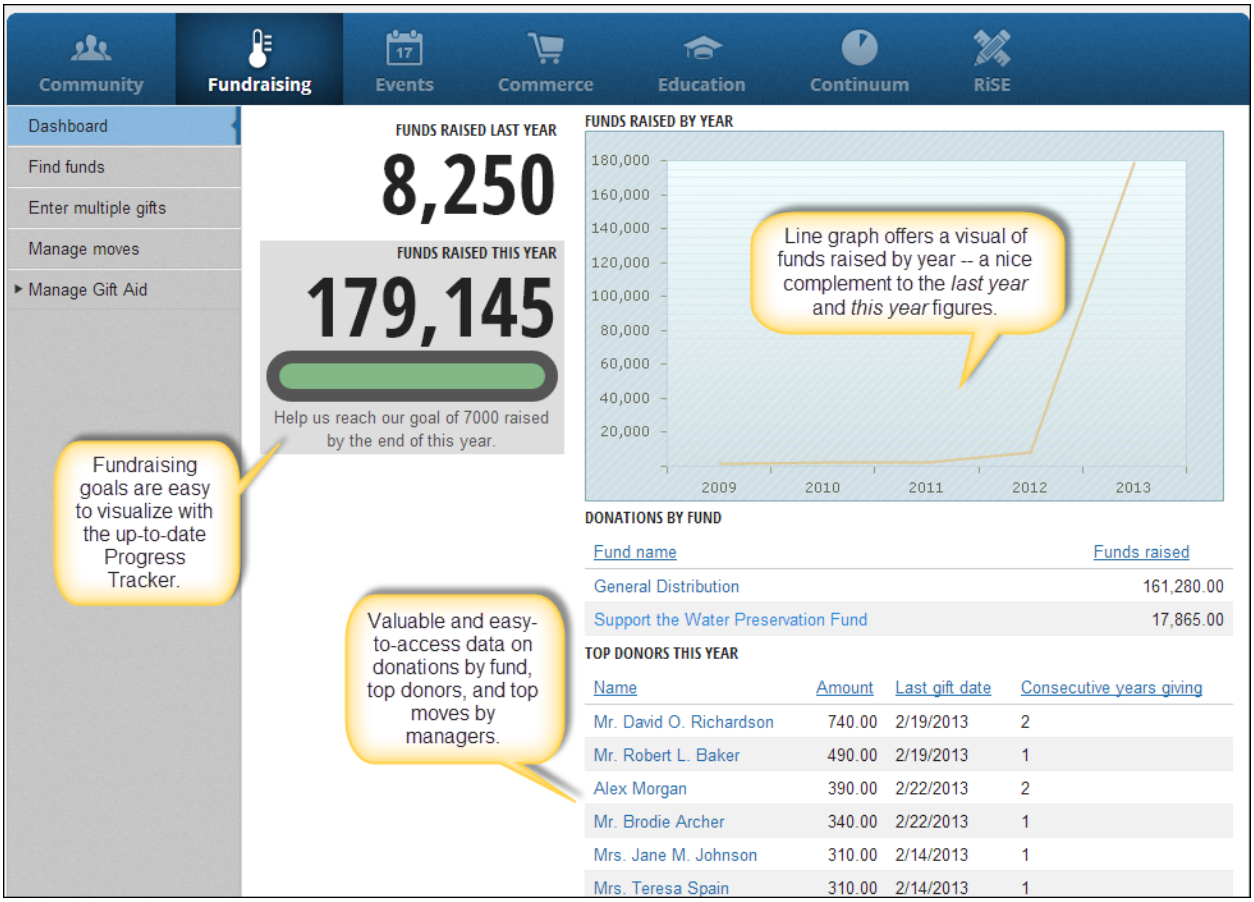
- a cash line, representing a cash payment or reversal
- a distribution line, typically representing an entry to income
- an AR line, normally representing an offset to the accounts receivable account

A due to/due from (see "DueTo/DueFrom processing") situation arises when there is a difference between the entity assigned to the cash line (for example, representing the cash account into which the funds are deposited) and the entity assigned to either a distribution/income or AR line within the same transaction.

The accounts to which transaction lines are assigned depends on the module and on configuration options.

Fundraising

Fundraising offers an easy-to-read Dashboard Overview of your fundraising activities for present and past years, as well as figures on new donors via Acquisitions.



- Overview
- Funds raised last year
- Funds raised by year
- Funds raised this year
- Donations by fund
- Top donors this year
- Top moves managers this year

- Acquisitions
- Number of new donors
- New donor revenue
- New donor average gift
- New donors

Rapid Gift Entry

The Enter multiple gifts window in the iMIS Staff site lets you quickly enter new gifts or single pledges based on default values. For each session you can set the default values for a specific gift or pledge. After setting the default values, you can enter as many gifts or pledges as needed in one session.

The Enter multiple gifts window is the same in all views.

The Single Gift and Single Pledge gift types are the only gift types supported for Rapid Gift Entry. The Rapid Gift Entry table does not support the following:

- Installment gifts
- Split gifts
- Matching plans

Note: To use Rapid Gift Entry, your administrator must set up batch control (see Batch Control).

Enabling web-based Rapid Gift Entry

Do the following to enable the web-based Rapid Gift Entry.

To enable web access to Rapid Gift Entry

1. Grant the Full users Fundraising authorization level 3 or higher.
2. Set the system to use batches (go to Accounting > Processes > Manage batches).
3. Tell the Full users how to log on to iMIS Web View.

Setting defaults for Rapid Gift Entry

To process gifts quickly, you enter shared field values (defaults) to set up your Rapid Gift Entry table. After you submit these values, iMIS builds your pre-populated table, ready for data entry.

Note: In Rapid Gift Entry, you cannot enter an in-kind gift or asset.

To set defaults for Rapid Gift Entry

Go to Fundraising > Enter multiple gifts:

1. In the top half of the table, enter the required overview fields and any others that apply. Most of these fields are in the Single Gift entry form and are described in Enter and edit gifts window - Overview tab and in Enter and edit gifts window - Acknowledge tab.

- (required) Date Received
- (required) Batch – Lists existing open batches.
- Distribution
- Salutation
- Appeal
- Merge
- Campaign
- Sender
- Fund
- Pay By – Lists the available payment types associated with the selected batch type.

  The description displayed is the Title of the cash account defined by the system administrator in Accounting > Options > Set up tables > Set up cash accounts.

2. In the bottom half of the table, enter one or more gift detail fields:

- (required) Gift Type
- Gift Amount
- Description
- Notes

3. Specify the number of entries you want to pre-populate with these defaults: How many rows would you like?
4. Click Go.

Using Rapid Gift Entry

When using the Enter multiple gifts window in the iMIS Web View, gifts paid for in cash or by check cannot be entered in the same batch as gifts paid for with debit or credit cards. Instead, cash and check gifts must be entered in a batch enabled for cash. When you create a batch for a cash or check gift entry, select an account from the Cash Table field that is set up for cash (go to Accounting > Processes > Manage batches).

Note: If the Multi-use checkbox is labeled in Configure > Fundraising > Configure fundraising options, then the generic checkbox appears next to the Notes column in the Rapid Gift Entry table. The checkbox is the last field on each line item in the grid.

Keyboard shortcuts for Rapid Gift Entry

Once your cursor is in the table, you can complete data entry without using the mouse:

- Tab – moves from left to right
- Enter on an icon pops up the needed window (Search or Add donor information)
- Arrow Down – moves the user to the donor id field at the start of the next row
- Alt+S – submits the batch to iMIS

To use Rapid Gift Entry

Go to Fundraising > Enter multiple gifts:

1. To customize the Rapid Gift Entry table, enter the field default data.

Note: On the web, the batch selected on the Enter multiple gifts window is for Rapid Gift Entry transactions only. No other types of transactions can be entered.

2. Click Go. The Enter multiple gifts window is updated with a table for data entry.
3. In the table, enter the donation information. You can override the value in any of the rapid entry fields for any gift or pledge.

   Tip: On the web, save your entries before clicking another tab, or your work might be lost.
4. Click Save.

   To substitute a credit card holder name

   During Rapid Gift Entry, you can submit donations for a donor with a credit card under a different name by manually overriding the donor's name in the Name on Credit Card column. iMIS substitutes the correct name.

   iMIS automatically associates the Name on Credit Card with the donor based on how you searched for the donor:

- By ID number: The text [Default:Donor's Name] appears in the Name on Credit Card column. This indicates that the Name on Credit Card will be substituted with the donor's name.
- By contact name: The name of the donor appears in the Name on Credit Card column.

Moves Manager

(Major Donor Solicitation)

Major gifts fundraising requires a highly individualized and hands-on approach. "Moves Management," developed by G.T. “Buck” Smith and David Dunlop at Cornell University, is a process of relationship management that specifically cultivates major gifts. This process spans prospect identification and research through involvement, solicitation, and stewardship.

Creating a Moves Management plan can help fundraisers build relationships with donors, which improves their success in obtaining larger contributions. Whether you need to

create a cultivation plan, track the moves made per donor, or check on the total amount raised, Moves Manager can help.

To designate a Moves Manager

The Moves Manager (also known as the solicitor) is responsible for defining a plan for interactions with the donor (the cultivation plan) and for keeping track of the plan's progress.

1. Find and select the staff member you want to designate as a Moves Manager.
2. From the staff member's account page, select the Donor Data tab.
3. Edit the Donor Info panel, and select the checkbox Is a moves manager.

   After saving this change, the staff member can be selected as a donor's Moves Manager.

To assign a Moves Manager to a contact

Any contact in iMIS can be assigned to a Moves Manager. Once assigned, the contact appears as a Major Donor assigned to the Moves Manager from Fundraising > Manage moves.

1. Find and select the contact.
2. From the contact's account page, select the Donor Data tab.
3. Edit the Donor Info panel, and from the Moves manager dropdown list, select the Moves Manager you want to assign.

   After saving this change, the Moves Manager can manage a cultivation plan for the contact.

To manage a prospective donor's cultivation plan

The Moves Manager can create a unique cultivation plan for each of their prospective donors, then track the plan's progress.

1. Sign in as a staff member that is designated as the contact's Moves Manager.
2. From Fundraising > Manage moves, select the contact for whom you want to manage the cultivation plan.
3. Create a cultivation plan. Edit the Cultivation Plan panel to define the following:

- Gift Type – Select the gift type you hope to acquire from the donor.
- Estimated Value – Enter the estimated value of the gift.
- Planned Ask Time – Define the timeframe for the plan.
- Note – Add any notes about the plan.
- Quality – Assign a quality level to the plan. For example, from here you can mark a plan as a high priority.

4. Add Cultivation Activities to track progress on the plan:

- Type of Move – Select the type of progress made on the plan. For example, note the type of contact made with the donor.
- Date – Enter the date the move occurred.
- Note – Enter any notes related to the move's progress.
- Follow Up Date – Select a date to follow up with the prospective donor.
- Follow Up Note – Enter any notes to keep in mind for the follow up contact.

5. Save and close the window.

Donations

With the Donation Creator iPart, you can integrate an online fundraising campaign into your website seamlessly. When you use the iPart alone or in combination with other iParts, your supporters can either pay for the gift immediately from a donation page or add the gift to their shopping cart and pay for it along with any other items from your store.

Tip: See the sample donation pages in the Member sample site. Turn on Easy edit to inspect the content records and iPart configuration settings.

Building donation pages

The Donation Creator is a flexible iPart that you can use in a variety of scenarios. Following are guidelines about setting it up to work in the two processing modes available:

- adding a donation to the cart
- processing the donation immediately

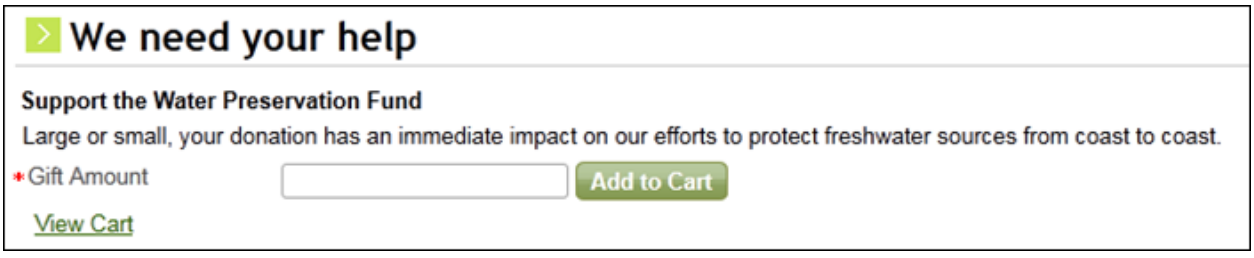
Regardless of the mode you choose, you must decide how to assign the distribution that is associated with the donations you receive. See Associating the donation with a distribution.

To build donation pages that use the cart

Using only the Donation Creator iPart, supporters can make a donation and then pay for it separately through the cart. At that time, they must also pay for any other items in their cart.

At a minimum, your content record must contain a Donation Creator iPart that is configured with a Processing mode of Add donation to the cart (setting a Commit sequence is not required). You can also use it with other iParts. For example, you could set up a page that features donation campaigns and products (using the General Product Display iPart), each of which your users can add to their cart with a single click.

Note: In this mode, you cannot connect the Donation Creator to the Display Name Editor or the Tribute Gift Editor. Those iParts can only be used together when the Donation Creator is configured to Process donation immediately.



To build donation pages that bypass the cart

You can build donation pages that allow supporters to enter their donation and payment information from a single page, bypassing the cart. There are many ways to set up your donation process, but at a minimum, you must do the following.

Go to RiSE > Content Designer > Manage content:

1. Create a new content record or edit an existing one.

   Note: For a sample content record, see @/iCore/Fundraising/Give Now. Make a copy of this content record if you want to use it in your website.

2. You must add multiple iParts to your content record to set up a standalone donation page. It does not matter the order in which these iParts are defined or displayed on the page. However, some configuration options are required so that iMIS can successfully process donations.

- Donation Creator – Allows entry of donation information.
- Processing Mode: Process donation immediately.
- Distribution: See Associating the donation with a distribution for your distribution options.
- Commit sequence: 2
- Display Name Editor – (optional) Allows donors to specify the name to be listed in all reports and acknowledgements for their donation (for example, Bob and Sue Smith). If you use this iPart, you must also create a connection to the Donation Creator|topic= Allowing donors to change the display name for the donation.
- Commit sequence: 3
- Salutation Type: Donation List As
- Tribute Gift Editor – (optional) Allows donors to make a donation in honor, memory, or recognition of someone. If you use this iPart, you must also create a connection to the Donation Creator|topic=Allowing donors to make tribute donations.
- Commit sequence: 4

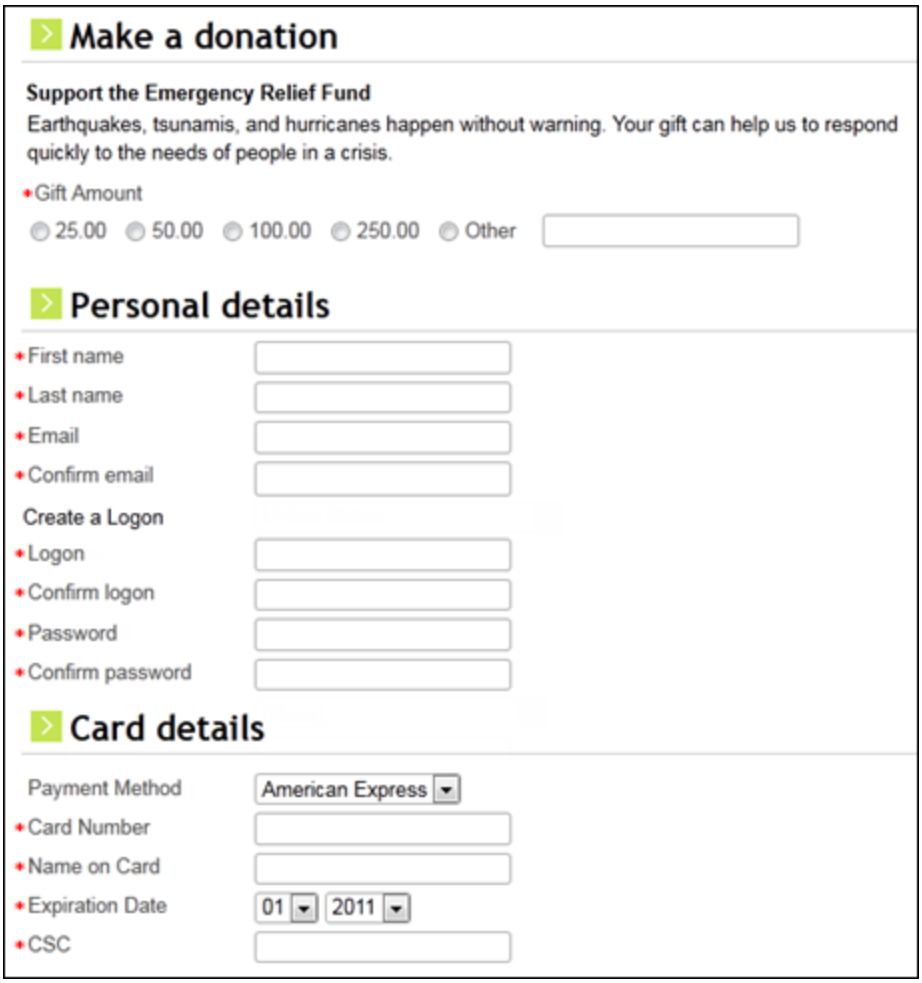
- Contact Account Creator – Allows unauthenticated users to create an account when they submit a donation.
- Hide for authenticated users: Enable

  Users must log in to make a donation, so that their contribution is recorded against an iMIS ID. Enable this option so that your supporters are only prompted to create an account if they are not logged in.
- Include option to create an account: Enable
- Require username and password: Enable
- Commit sequence: 1
- Payment Creator – Required to allow entry of payment information. For how to set up PayPal support, see PayPal Express Checkout Integration in Payment Authorization.
- Purpose: Donation
- Display Update button: Disable
- Commit sequence: 5
- Submit Order Button Link – Required to submit the donation.
- URL for order confirmation: Select a content record to display after the user has submitted a donation.

  Note: For a sample content record thanking the user for their contribution, see @/iCore/Fundraising/Donation Thank You Page. Make a copy of this content record if you want to use it in your website. It includes a sample implementation of HEP's E-Match Donor Link, which encourages donors to check if their employer has a matching gift program. The link is embedded in a Content HTML iPart using an iframe. Contact HEP if you want to create a custom link for your organization.
- Purpose: Donation
- Commit sequence: 6

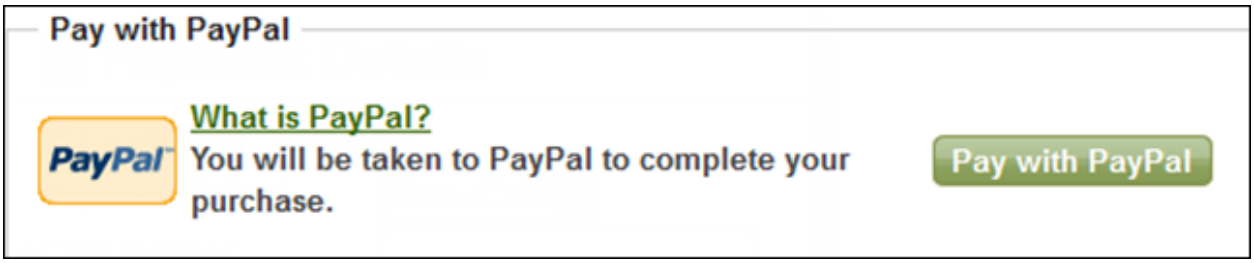
3. Save and Publish your content record.

When displayed in your website, the result should look something like this:



Offering Pay with PayPal

If you already accept credit cards online, you can set up Express Checkout with PayPal to integrate with your site. The PayPal option can enhance your campaign success by giving your donors the reassurance of a known and secure payment method. This option also reduces your liability for holding cardholder data, because their credit card information is stored securely at PayPal.



The Payment Creator iPart supports the PayPal Express Checkout panel when it appears outside of the context of the shopping cart, on a standalone donation page.

See PayPal Express Checkout Integration in Payment Authorization for how to set up PayPal support.

Allowing donors to change the display name for the donation

To provide the option for donors to change the name listed in reports and acknowledgements for a donation (for example, The Smith Family):

1. Add the Display Name Editor to a content record that contains the Donation Creator iPart configured with a Processing Mode of Process donation immediately.
2. Create a connection to the Donation Creator iPart.
3. Configure the Display Name Editor Salutation Type to be Donation List As.

Note: When you set up a connection between the Display Name Editor and the Donation Creator, then the value entered only applies to that specific donation. When the Donation List As type is selected, and the iPart is not on a donation page, then the value entered is saved for all future donations. The Donation List As salutation is synchronized with the List As field in Administrative Console > Home > Customer service > Enter and edit gifts > Overview tab. If you change one field, then the other field is also updated.

To create a connection for the Display Name Editor

1. Edit the content record that contains your donation iParts.
2. Set up the connection. From the Display Name Editor iPart's title-bar menu, select Connect. The Connect box that opens shows you any current connections and lets you disconnect them.
3. Click Create a new connection. The Connect box that pops up prompts you to create one of four connection types.
4. From the Object Consumer dropdown list, select your Donation Creator iPart.
5. Select Connect.

6. Save and Publish the content record.

Allowing donors to make tribute donations

When you add the Tribute Gift Editor to your donation page, donors have the option to indicate if their donation is a tribute. They can choose to make their donation in honor, memory, or recognition of someone and enter a tribute message. If they choose to notify someone of their donation, the recipient information they enter creates a new contact in your database. The creation of duplicate contacts is prevented by checking to see if another contact already exists with the same name and address, or name and email address.

To allow tribute donations, add the Tribute Gift Editor to a content record that contains the Donation Creator iPart configured with a Processing Mode of Process donation immediately and then create a connection to the Donation Creator iPart.

To create a connection for the Tribute Gift Editor

1. Edit the content record that contains your donation iParts.
2. Set up the connection:

1. From the Tribute Gift Editor iPart's title-bar menu, select Connect. The Connect box that opens shows you any current connections and lets you disconnect them.
2. Click Create a new connection. The Connect box that opens prompts you to create one of four connection types.
3. From the Object Consumer dropdown list, select your Donation Creator iPart.
4. Select Connect.

5. Save and Publish the content record.

Displaying gift arrays or pre-populated gift amounts

By default, the Donation Creator displays an empty gift amount field for users to enter the amount they want to donate, but you can set it up to display other gift amount formats, including:

- A pre-defined array of gift amounts from which the user can choose
- A gift amount field with a pre-populated gift amount
- An array of suggested gift amounts based on the signed-in user's prior giving history

To display a pre-defined gift array or a pre-populated gift amount in the Donation Creator

1. In the Admin Console, go to Configure > Membership > Set up lookup/validation tables.
2. If a GIFT_AMOUNT table does not already exist, select New Table to create it.
3. Select the GIFT_AMOUNT table from the list and click New.
4. In the Code field, enter the distribution code for which you want to customize the display. For example, BLDG.
5. The values you enter in the Description field determine what is displayed on the donation webpage:

- To display an array of gift amounts, enter a comma-separated list of gift values that you want to appear in the list. For example, entering 50,100,200,500 results in a radio list of those values displayed on the page. To preselect an option, precede the number with an asterisk: 15,*25,75.

Note: The gift array always displays an option for the user to select Other and enter any amount.

- To display a single Gift Amount field with a pre-populated gift amount, enter a single amount. For example, 25.

6. Click Save.

To display a gift array based on the donor's giving history

1. Configure the Donation Creator iPart for which you want to display personalized gift arrays.
2. For the Personalized gift array query, select the query $/Fundraising/DefaultSystem/Queries/ProductFundraising/GiftArray.
3. Save and Publish the content record.

When an authenticated user visits the donation page, the donation amounts shown in the gift array are generated based on that user's prior giving history. For example, if their last donation was $50, the gift array shown for them might be 55, 110, 220, 440, and a free text entry field.

Associating the donation with a distribution

Every donation must be associated with an iMIS distribution, which is a predefined combination of a fundraising appeal, campaign, and fund. The distribution is credited with the donations you receive. It also controls the description displayed in the iPart (if the configuration option Display the gift distribution description is enabled), and it controls which gift options are displayed, such as an array of gift amounts from which the user can select, a single Gift Amount field that is empty, or a pre-populated Gift Amount field.

Distributions are defined in the Admin Console. Go to Configure > Fundraising > Set up tables > Set up distributions and premiums (see Defining distributions and premiums). For information about how to customize the Gift Amount display for iMIS distribution codes, see GIFT_AMOUNT (Lookup only).

To associate the donation with a distribution, you have two Distribution options available in configuration:

- Set the distribution by an ItemId URL parameter – Indicates that the Donation Creator iPart will be dynamically populated with a distribution based on the value of an ItemId parameter in the URL (described below).
- Select a distribution– Specifies a single distribution code to be used for any donations made from the iPart. If selected, this option overrides the value of an ItemId parameter in the URL.

  How to pass a URL parameter value to the Donation Creator

  Using a URL parameter allows you to set up a single donation page that is dynamically populated based on the distribution you pass to it. For example, let's say you want to provide a list of all of your current fundraising campaigns on your homepage, each of which links to a donation page for the cause. Instead of creating a custom donation page for each campaign, you can set up a single content record that contains the Donation Creator configured to Set the distribution by an ItemId URL parameter. Then you only have to add the URL parameter and distribution code to each of the links. When clicked, your content record displays the description and gift amount options associated with the distribution code.

  The link to your Donation Creator page can be built using relative links, absolute links, or navigation items.

- Relative link: To assign the URL parameter from a relative link pointing to a content record published to your website, use the Content Link iPart. For example, if you have a content record with a Publish File Name of DonateNow in the @/iMIS/Fundraising content folder, and you want the link to populate the Donation Creator with the BLDG distribution, then enter the following relative URL in the Content Link iPart's URL for link field: ~/iMIS/Fundraising/DonateNow.aspx?ItemId=BLDG.
- Absolute link: To assign the URL parameter through an absolute link to the page, add the URL parameter to the link's URL. For example, if you want to create a link to a donation page for the BLDG distribution, set the URL to

http://mywebsite.com/donationpage.aspx?ItemId=BLDG.

- Navigation item: To assign the URL parameter from a navigation item, enter ItemId-d=DistributionCode in the URL Parameters field of the navigation item pointing to your content record. For example, ItemId=BLDG.

Friendraising

Friendraising adds social networking and peer-to-peer fundraising functionality to the iMIS fundraising product line. Customers who add Friendraising to their iMIS solution can empower their constituents to reach out to new members and donors. Friendraising supports campaigns and special events that rely on fundraising among peers to succeed.

This entirely web-based service empowers both the organization and its supporters. Organizations are able to communicate directly with team captains, share fundraising tips and tricks, upcoming deadlines, success stories, and other key information for the campaign. The result is dramatically increased campaign and member recruitment and fundraising revenue built upon of the strength of one-to-one relationships.

Friendraising consists of two pieces:

- The Friendraising Administration Console (a third party application) provides you with a site where you can create online fundraising events, from which your supporters can sign up to participate, create their own personal pages, set up collection goals, raise funds, and promote their participation to their friends, family, and others.

  Note: Contact your AiSP about obtaining the Friendraising Administration Console, which is separate from the iMIS Friendraising interface. The console is a required component of the Friendraising feature.

- The Friendraising Interface in iMIS provides the tools you need to import all activities from the Friendraising site into iMIS to create new contacts, event registrations, and donations. When a member clicks Sign Up on her Friendraising event home page, that transaction is considered a registration in the Friendraising system. During sign up, the member can add a Friendraising donation. iMIS uses a similar model to integrate transactions:

- A Friendraising constituent is imported as an iMIS Contact.
- A Friendraising registration is imported as an iMIS Event Registration.
- A Friendraising donation or sponsorship is imported as an iMIS Donation.

Enabling Friendraising

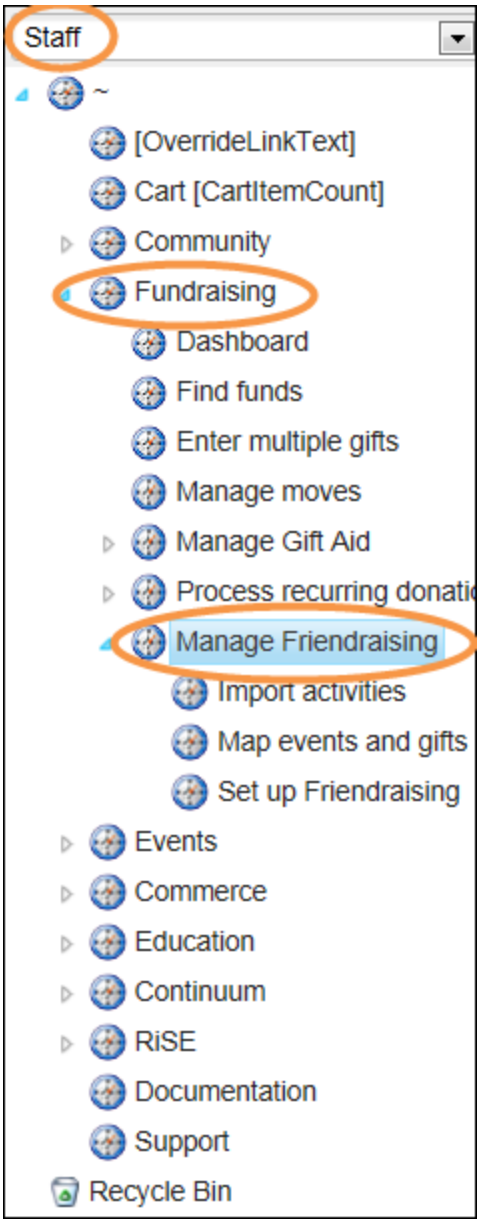
iMIS comes with the Friendraising feature pre-installed, however, by default, it is hidden and must be enabled. This is accomplished by unhiding the Manage Friendraising navigation item.

Note: The steps in this section are based on the default configuration of Friendraising. Your view of the product may not match these steps if your organization has implemented this feature in another way.

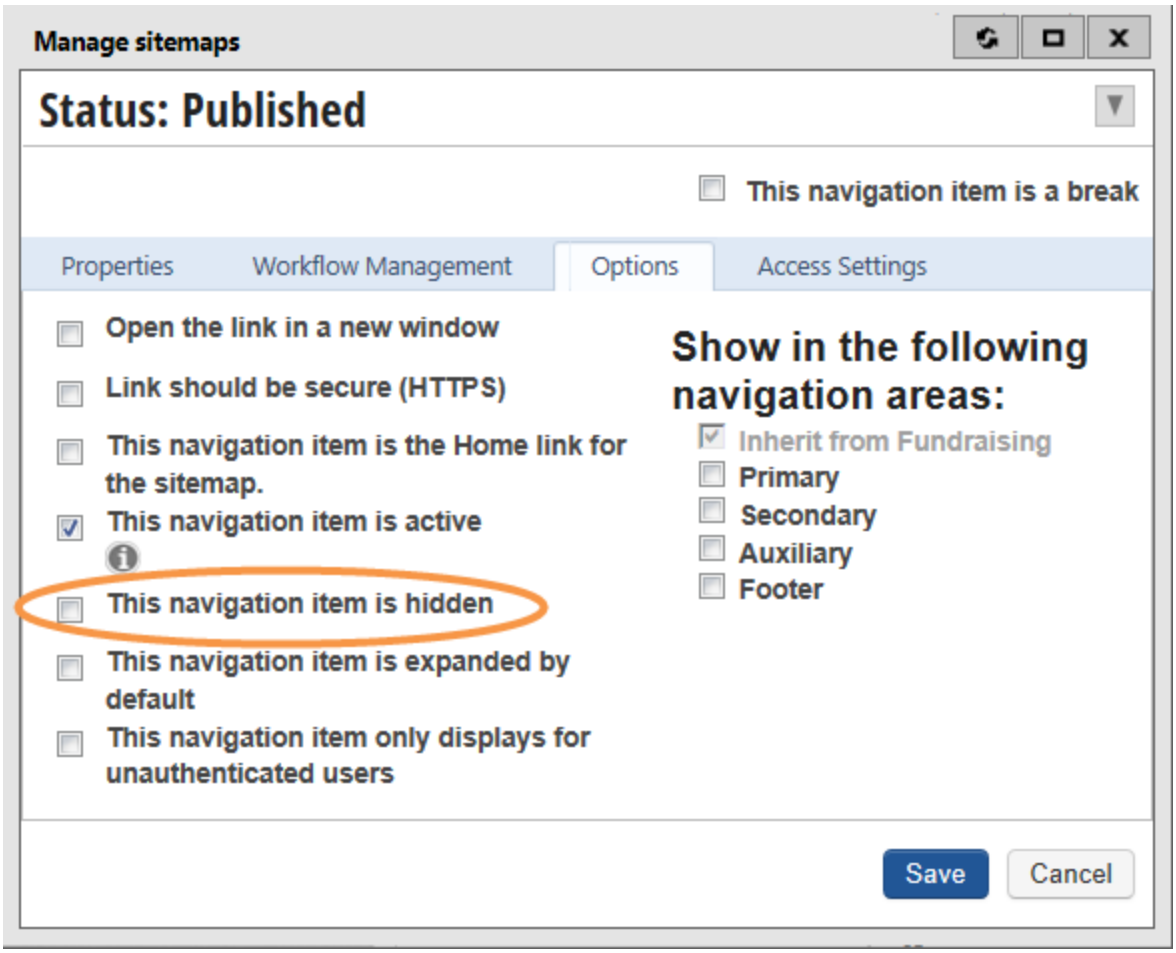
To access Friendraising on the Staff Site

Go to RiSE > Site designer > Manage sitemaps:

1. From the drop-down menu above the sitemap tree, select Staff.
2. Reveal the Manage Friendraising navigation item.

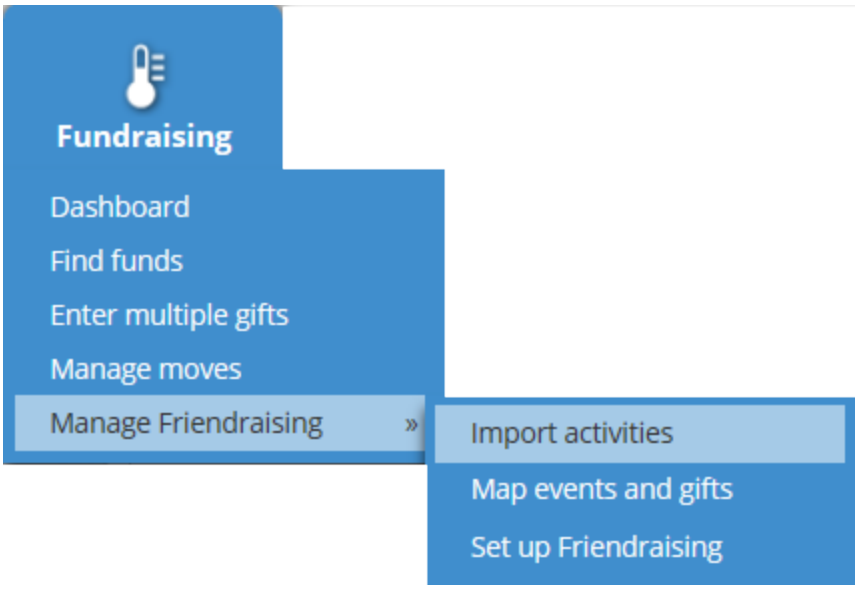


- In the sitemap tree, expand Fundraising.
- Select the Manage Friendraising navigation item.
- Click Edit.
- Under the Options tab, clear the This navigation item is hidden checkbox.
- Save, and close the window.



- From the toolbar, click Publish.

  The three Friendraising pages, Import activities, Map events and gifts, and Set up Friendraising, are displayed.



3. (optional) Set up on-demand imports using the Friendraising Importer iPart.

   Note: To use this iPart, your AiSP must help you set up the Friendraising Administration Console for on-demand exports.

- From RiSE > Content designer > Manage content, edit the Friendraising Imports content record.

  Note: By default, this is available from Core Content > Tools > Friendraising Imports, However, depending on your organization's configuration selections, this content record could be elsewhere.

- Remove the File Importer For Web Services iPart.
- Click add content to find and select the Friendraising Importer iPart.
- Save and Publish the content record.

Setting up Friendraising

To start using iMIS Friendraising:

- Update the Staff sitemap and configure the Friendraising pages from Content Management.
- Define the settings required to use the Friendraising Bridge in iMIS.

Note: These settings are defined within the third party Friendraising Administrative console.

- Map the events defined in the Friendraising Administration Console to events and gifts defined in iMIS.
- (optional) Create user-defined tabs for the Friendraising tables.
- (optional) Create the Team Participation report.

Note: Contact your AiSP about obtaining the Friendraising Administration Console, which is separate from the iMIS Friendraising interface. The console is a required component of Friendraising.

Setting up the Friendraising pages in iMIS

To set up the default member type of imported Friendraising contacts

Your system's default member type is assigned to any new contacts created when importing Friendraising transactions. If you have not already done so, select your default member type from RiSE > Set up web components > Quick setup > The default Customer Type to use when creating new customers online.

Configuring the Friendraising pages

The Friendraising pages are built in iMIS using content records and iParts|topic=Concept: content records, iParts, and content types that you can configure for the needs of your organization. For information about how to configure iParts, see Fields: Content Gallery. iMIS Friendraising is comprised of the following:

Description	Default navigation	Default content records	iParts
New node on the Fundraising tab to organize the Friendraising pages.	Fundraising -> Manage Friendraising	(none)	(none)
Staff can import and process Friendraising Export Files downloaded from the Admin-	Fundraising > Manage Friendraising	@/iCore/Tools/Friendraising_Imports	File Importer For Web Services

istration Console. The Export File must be manually downloaded first before you can import it.	> Imports		• File Viewer For Web Services • Log Viewer For Web Services
Staff can import Friendraising Export Files on demand from the third party Friendraising Administration Console, without the need to download the file first. If you prefer to use this import method, edit the Friendraising Imports content record and replace the File Importer For Web Services iPart with the Friendraising Importer iPart. Note: You must contact your AiSP to request that they enable your Friendraising Administration Console for exports to use this iPart.	(none)	(none)	• Friendraising Importer
Staff can map the events defined in the Friendraising Administration Console to gifts and/or events defined in iMIS.	Fundraising > Manage Friendraising > Map events and gifts	@/iCore/Tools/Friendraising_Mappings	• Friendraising Mapping
Staff can define the settings	Fundraising	@/iCore/Tools/Friendraising_	• Friendraising

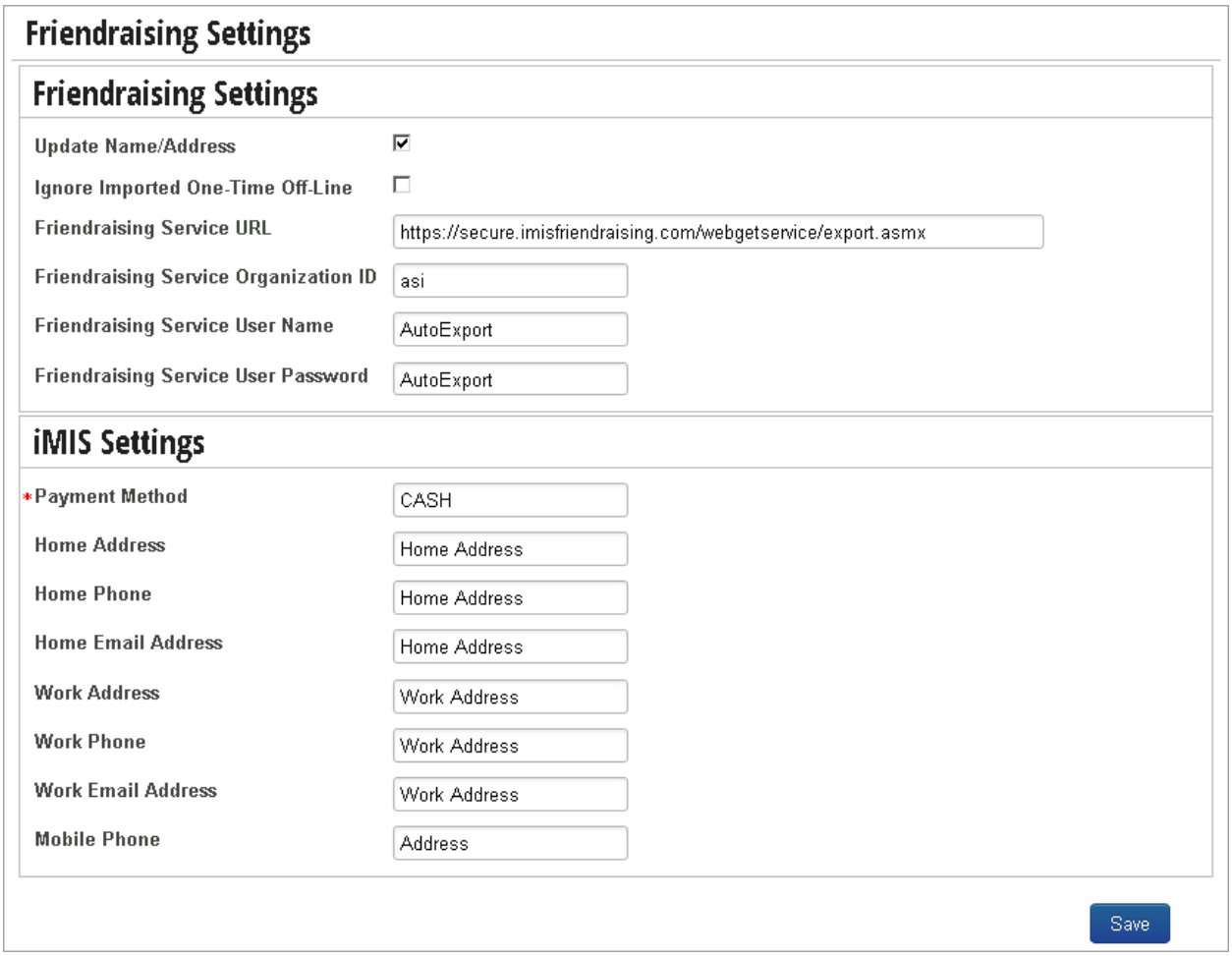
required to use the Friendraising Bridge in iMIS.	> Manage Friendraising > Set up Friendraising	Settings	Settings

Defining Friendraising settings

To import Friendraising contacts, event registrations, and gifts, you must define your connection settings and map the Friendraising events to iMIS events and distributions.

To define settings

Go to Fundraising > Manage Friendraising > Set up Friendraising:



1. Define the following Friendraising Settings:

- Update Name/Address: Enable this option if you want to update the name and address of Friendraising contacts in iMIS when differences are detected during an import. For example, if an existing contact registers for a Friendraising event using a new street address, their iMIS contact record is updated with the new address when you import the Friendraising transaction.

  This option does not affect new Friendraising contacts, which always generate new contact records in iMIS.

- Ignore Imported One-Time-Off-Line: Select this option if you do not want to import transactions marked as One-Time-Off-Line in Friendraising. This marker indicates that a transaction has been imported to the Friendraising Administration Console from an external source.

  For example, when setting up a new Friendraising implementation, some users import donations into the console to maintain a historical record. These imported transactions are marked as One-Time-Off-Line in the console.

- To download your Friendraising Export Files to iMIS on demand via the Friendraising Importer iPart, you must enter the following authentication information.

  Note: If you have not already done so, contact your AiSP to request that they enable your Friendraising Administration Console for on demand exports, so that you can enter the information below.

- Friendraising Service URL
- Friendraising Service Organization ID
- Friendraising Service User Name
- Friendraising Service User Password

2. Define the following iMIS Settings:

- Payment Method: Enter an iMIS Cash Account Code that is a Cash type. Incoming Friendraising transactions are associated with this code. iMIS Cash Account Codes of other types (i.e. Credit Card) cannot be used, because the incoming transactions have

already been billed via the payment gateway associated with your organization's Friendraising account. We recommend that you create a distinct Cash Account of the Cash type to track Friendraising transactions, so that you can make sure these are reconciled separately from other iMIS transactions (see Setting up cash accounts). If you create a new Cash Account, be sure to restart the ASISOAHost20 service before importing any transactions.

- If you want to capture address data from your imported Friendraising transactions, you must enter an iMIS Address Usage label for each Friendraising field listed below. You can find your Address Usage labels in Desktop from Customers > Set up module > General > Address and Notes.
- Home Address
- Home Phone
- Home Email Address
- Work Address
- Work Phone
- Work Email Address
- Mobile Phone

  Note: You can only record one phone number per each iMIS Address Usage label. Therefore, you must assign a unique iMIS Address Usage label to the Friendraising Home Phone, Work Phone, and Mobile Phone settings.

  Similarly, you can only record one email address per each iMIS Address Usage label. Therefore, you must assign a unique iMIS Address Usage label to the Friendraising Home Email Address and Work Email Address settings.

3. Click Save.

   Mapping events and gifts

To import registrations and gifts, you must first map each event defined in the Friendraising Administration Console to an event defined in iMIS. To map events, you need the Friendraising Event ID as well as the iMIS distribution, event, and function codes.

Each Friendraising event you create in iMIS must include at least one event function. The function fees are defined in the Friendraising Administration Console.

Each Friendraising donation is considered a single gift in iMIS. When a donor sponsors an event participant, the donation is imported as a single gift from the sponsor, but iMIS also records a soft credit|topic=About soft credit history in the iMIS Administrative Console on the event participant's record to show who is responsible for helping to obtain the gift.

To map events and gifts

Go to Fundraising > Manage Friendraising > Map events and gifts:

1. Click + Add new record.
2. Define the following Mapping elements:

- Event Id: The Friendraising event ID listed in the export file.
- Gift Item Code: The iMIS Distribution Code to be assigned to imported gifts associated with this event.
- iMIS Event Code: The iMIS Event Code to be assigned to imported registrations associated with this event.
- iMIS Event Function Code: The iMIS Event Function Code to be assigned to imported event function registrations associated with this event.

Note: If a registration fee has been set up for the event in the Friendraising Administration Console, then you must map that event to an iMIS Event Function Code that has the same fee amount.

3. To save the event mapping, click Insert.

Setting up Friendraising user-defined tabs in iMIS Administrative Console

To record and display important information about Friendraising event participants in the iMIS Administrative Console, you must first run a SQL script that allows you to create user-defined tabs based on the Friendraising-specific tables.

To enable the Friendraising tables for user-defined tabs

1. From the ~\util folder located in your appserver's installation directory, locate the Register-FriendraisingUDTablesV10.sql script. The ~\util path is relative to the root of your iMIS application.
2. From SQL Server Management Studio, execute the Register-FriendraisingUDTablesV10.sql script on your iMIS database.
3. From iMIS Administrative console, create user-defined tabs for the following Friendraising tables and fields:

- To create and edit the user-defined tables, go to iMIS Administrative console > Configure tab > Membership > Configure membership options > Additional Windows.

Description	Table	Fields
Contains information about any teams a contact has joined as part of an event registration.	Name_FRTeamInformation	ID SEQN MEETING TeamID TeamName TeamType TeamGoal

Contains information about a contact's event registrations.	Name_FREventInformation	TeamCaptainAlternateId ID SEQN MEETING LocationID RegistrationType ParticipantGoalOnline
Contains survey questions and the contact's answers.	Name_FRSurveyQuestion	ID SEQN MEETING QuestionID AnswerID AnswerValue
Contains the contact's mail and email opt out preferences.	Name_FRAdditionalInfo	ID HomeMailOptOut HomeEMailOptOut WorkMailOptOut WorkEMailOptOut
Contains a record of each registration or donation that has been successfully imported for a contact.	Name_FRTransactionLog	ID SEQN TransactionID TransactionType EventID ConstituentID

		DateImported
Contains a contact's AlternateId, which is the constituent ID in Friendraising. Note: Name_AlternateId is not a user-defined table specific to Friendraising, but does contain information useful for Friendraising purposes.	Name_AlternateId	ID SEQN IdType AlternateId

Managing Friendraising transactions

Use iMIS Friendraising to import Friendraising event registrations, donations, and contacts via Export Files downloaded from the Friendraising Administration Console.

Note: The steps in this section are based on the default configuration|topic=Setting up the Friendraising pages in iMIS of Friendraising. Your view of the product may not match these steps if your organization has implemented this feature in another way.

To import, process, and post Friendraising data

1. Import the Friendraising export file manually.

- Manual download, using the File Importer For Web Services iPart:
- Download the Friendraising export file from your Friendraising Administration Console.
- In iMIS, navigate to Fundraising >Manage Friendraising > Import activities.
- Select XML file from the File Format list.
- Browse for the export file that you just downloaded, and then click Upload.
- The file is added to the list under the File Name column and is updated with a timestamp.

2. From the file list, click Process on the line of the file you imported.

When you click Process, iMIS uses your mappings|topic=Defining Friendraising mappings and settings to process the registrations and gifts in the Friendraising export file, and it removes the import file from the File list. One of two scenarios may occur:

- Import succeeds:
- Success - [import file name].log is created in the Log Viewer. The log lists each transaction that successfully posted.
- Import fails (one or more transactions could not be processed):
- Warnings - [import file name].log is created in the Log Viewer. The log lists each transaction that could not be processed and any payments that have been successfully posted. Review the error messages to determine how to resolve the problems.
- [import file name] - error - [timestamp].xml is created in the File list. This file contains only those transactions that could not be processed. After you resolve the problems listed in the Warnings log file, Process this file to complete the import.

3. From iMIS Administrative Console, navigate to Accounting > Processes > Manage batches.

   Imported Friendraising transactions are automatically placed in system-generated batches that are created based on the date the import took place. All of the transactions from a single day are placed in a batch named Auto-Created, created by AUTOBATCH. This batch may contain other auto-created transactions. If today's Friendraising batch is closed, and a new import takes place, a new batch is created with today's date.

4. To review the imported Friendraising transactions, select the appropriate Auto-Created batch and click Print Selected.
5. To post the batch, click Post Selected.

Creating a Team Participation report

For easier querying and reporting, use the vFRParticipantTeamCaptain view, which unites team, team captain, and participant information. The view is created when you install Friendraising, and it contains the following columns:

- ID
- Meeting
- Team ID
- Team Name
- Team Type
- Team Goal
- Captain ID

To report on this information, create a Team Participation query based on a business object that uses this view.

To create the Team Participation report

1. Create the new business object.

Go to RiSE > Business object designer:

- Select New > Design Business Definition.
- Name the object FriendraisingTeamInfo.
- Click Create Object.
- (Database tab).
- From the Tables section, click Add.
- Select the vFRParticipantTeamCaptain view and click OK.
- The Available Columns section is updated to list the view's fields.
- From the Available Columns list, select the fields you want to be listed as Properties of the business object and then click Add as Properties. The properties are added in the order you select them. Or you can Add All as Properties. If you add all fields as properties, the properties are added in alphabetical order.
- Click Save and then Publish.

2. Define a query using the new business object.
3. Create a report using the new query.

Gift Aid (UK)

iMIS Gift Aid allows UK charities to reclaim tax on Gift Aid donations. This adds significant value to a gift at no cost to the donor.

How Gift Aid works

Paul earned £1000 last month. Assuming he pays regular income tax on his earnings at the basic rate of 20%, £200 in tax was deducted from his pay, or £25 in tax for every £100 in pay.

Paul then makes a donation of £100 to your charity. If Paul completes a Gift Aid declaration, you can reclaim the £25 he paid in tax on this £100 donation. Thus, your charity receives £125 (£100 donation + £25 tax reclaim) at no extra cost to Paul.

Changes to Gift Aid beginning April 6th, 2008

Since April 6th, 2000, charities have been able to claim Gift Aid relief at the basic rate of income tax (22%) if the individual donor consented and the donation was eligible for tax relief.

On April 6th, 2008, the basic rate of income tax changed to 20%, reducing the amount of Gift Aid relief available to charities. However, the government instituted a period of transitional tax relief that will last from April 2008 to April 2011. During this time, charities can claim 20% Gift Aid relief on donations and the HMRC will make up the remaining 2%.

Charities do not need to make a special claim for transitional relief. HMRC pays it automatically along with your Gift Aid tax repayment.

For more information about Gift Aid, visit the HMRC Gift Aid site.

Managing Gift Aid

Use iMIS Gift Aid to manage the following tasks:

- Recording a contact's Gift Aid declaration, so that you can reclaim tax on their donations.
- Generating Gift Aid tax reclaim data so that you can track the eligible Gift Aid donations your organization has received. You can also mark these as claimed, so that those transactions do not show up in future iMIS generated reclaims.
- Creating a printable report that you can use to reclaim tax from the HMRC. Visit the HMRC for more information about how to reclaim tax on Gift Aid.

  Recording Gift Aid declarations

  If a donor is a UK taxpayer, they can make a Gift Aid declaration to your organization, so that you can reclaim the tax paid on their donation. Donors can make Gift Aid declarations online, by filling out a form, or by phone, but you must confirm the declaration in writing. The declarations you enter into iMIS are matched against the donations you receive when you generate Gift Aid tax reclaims. You can only reclaim the tax if a donor has a valid Gift Aid declaration.

  A donor's declaration only has to be completed once for your charity and can be valid for as long as the donor remains a taxpayer. It is the donor's responsibility to inform you when they are no longer eligible for Gift Aid. In theory, all declarations could be open-ended. However, many organizations prefer to contact donors periodically to check that they are still taxpayers, and thus use an arbitrary declaration length of four or five years.

  Note: A 30-day cooling off period is applied to all gift aid declarations, based on the Date Received entered for the declaration. During the cooling off period, no tax can be reclaimed for the contact. Once the 30-day period is over, donations received from the contact are eligible for gift aid reclaims.

  To enter a Gift Aid declaration

1. From iMIS Web View, select Community > Find contacts.
2. Search for and select a contact.
3. From Contacts > Contact management, select Gift Aid declarations.
4. Select Create new declaration.

5. Create a new declaration using the fields described in the Gift Aid declaration window section.
6. Click Save.

To generate Gift Aid tax reclaim data

1. Navigate to the Tax reclaim page in iMIS. By default, it is located on iMIS Web View under Donations > Gift Aid.
2. Enter the tax recovery information using the fields described in the Gift Aid tax reclaim window section.
3. Click Generate Claim.

   The new claim appears in the Review Claim section.
4. Select Review next to the new claim.

   The Claim Details page opens.
5. Review the transactions in the claim.

   Note: iMIS does not check for missing or incomplete donor names in the claim. We recommend that you review the data and update records within iMIS as needed.
6. (optional) From the In Claim column, use the transaction checkboxes to exclude or include transactions in the claim. You can locate specific transactions using the Transaction ID or Contact ID fields.

   Changes to the transactions in the claim are automatically saved as you make your selections.
7. To ensure that the transactions in the claim do not appear in any future claims, select Mark as Claimed.

To create a Gift Aid tax reclaim report for the HMRC

1. Navigate to the Tax reclaim report page.

   By default, it is located on iMIS Web View under Donations > Gift Aid.

2. From the list, select Gift Aid Claim Report and click Run.
3. In the Gift Aid Reference Equals field, enter the claim's Tax Reclaim Reference.
4. Click Run.

   The tax reclaim report appears.
5. To export the report to a PDF or Excel file, click the one of the export icons located in the top-left of the page.

Gift Aid declaration window

These fields define a donor's gift aid declaration. By default, these fields are found in the following location:

- From iMIS Web View, select Contacts > Find contact, and then search for and select a contact. From Contacts > Contact management, select Gift Aid declarations.

Fields

- Prefix, First Name, Last Name – Defaults to the selected contact's prefix and name. These fields must contain the name of the individual paying tax for the gift aid declaration.
- Address, Address 2, Address 3, City, County, Postcode, Country – Defaults to the selected contact's main address in iMIS. For HMRC reporting purposes, the address fields must contain the taxpayer's correct address.
- High-rate tax payer – Indicates that the donor is a high rate tax payer. This field is for informational purposes only and does not affect the amount of tax reclaimed. You could use this information, for example, to target marketing campaigns to these donors.
- Declaration Notes – Captures notes about the declaration.
- Status – Specifies the status of the declaration.
- Declaration Method – Specifies how the declaration was made.
- Confirmation Required – Indicates that confirmation of the declaration must be obtained from the donor before any tax can be reclaimed. For example, a declaration made verbally requires confirmation. When cleared, no further confirmation is required.

- Confirmation Sent Date – Specifies the date a confirmation letter was mailed to the donor.
- Date Received – Specifies the date the donor made the declaration.

  Note: A 30-day “cooling off” period is applied to all gift aid declarations, based on the Date Received entered for the declaration. During the cooling off period, no tax can be reclaimed for the contact. Once the 30-day period is over, donations received from the contact are eligible for gift aid reclaims.
- Effective From – Specifies the date from which the declaration is valid.
- Apply 4 year rule – Sets the effective date of the declaration to a rolling four-year period that equals today minus 4 years.
- Other – Specifies a fixed date from which the declaration is valid.
- Expiry Date – Specifies the end date of the declaration. An end date is not required. However, some organizations prefer to contact donors periodically to check that they are still taxpayers, and thus use an arbitrary declaration length of four or five years.
- Related Appeal – Specifies a related appeal code associated with the receipt of the declaration.

Gift Aid tax reclaim window

These fields define a donor’s gift aid declaration. By default, these fields are found in the following location:

- From iMIS Web View, select Donations > Gift Aid > Tax reclaim.

  Fields
- Tax Reclaim Reference – Specifies a unique reference for the claim. The reference can be any combination of letters, numbers, or special characters. It has a maximum length of 50 characters.
- From / To – Specifies the date range of the tax reclaim. The From and To dates must not cross the end of a UK tax year which runs from 6 April to 5 April the following year.

- Tax Rate – Specifies the tax rate to be applied to the tax reclaim. Claims made for transactions before 6 April 2008 use a 22% tax rate, and transactions after that date use the prevailing tax rate.

Setting up Gift Aid

To set up Gift Aid in iMIS, you must:

- Edit iMIS Web View sitemap to display the Gift Aid navigation items.
- Configure the Gift Aid pages.

To display the Gift Aid navigation items

Go to RiSE > Site Designer > Manage sitemaps:

1. From the drop-down menu above the sitemap tree, select iMIS Web View.
2. Reveal the Gift Aid declarations navigation item.

1. In the sitemap tree, select Contacts > Contact management > Gift Aid declarations.
2. From the toolbar, click Edit.
3. (Options tab) Clear the This navigation item is hidden checkbox.
4. Click Save.
5. Close the window.
6. From the toolbar, click Publish.

3. Reveal the Gift Aid navigation item.

1. In the sitemap tree, select Donations > Gift Aid.
2. From the toolbar, click Edit.
3. (Options tab) Clear the This navigation item is hidden checkbox.
4. Click Save.

5. Close the window.
6. From the toolbar, click Publish.

To configure the Gift Aid pages

iMIS Gift Aid is built using content records and iParts (Concept: content records, iParts, and content types) that you can configure for the needs of your organization.

By default, iMIS Gift Aid is comprised of the following:

Description	Default sitemap navigation	Default content record	iParts
Record and manage Gift Aid declarations from donors.	Contacts > Contact management > Gift Aid declarations	@/iCore/Fundraising/Gift Aid declarations	ContentTypes/Offering/Gift Aid Declaration
Generate data for Gift Aid tax reclaims.	Donations > Gift Aid > Tax reclaim	@/iCore/Fundraising/Gift Aid tax reclaim	ContentTypes/Offering/Gift Aid Reclaim
Create tax reclaim reports for the HMRC.	Donations > Gift Aid > Tax reclaim report	(none)	(none)

Standing Orders (UK)

Some donors like to give recurring, open-ended gifts by instructing their bank to pay a certain amount of money each month, quarter, or year directly to the non-profit's bank account. In the UK, these bank instructions are known as Standing Orders. Unlike a continuous credit card donation or a direct-debit bank transaction, the donor initiates the Standing Order and the bank makes regular payments on the donor's behalf.

In iMIS, Standing Orders are known as Commitments. iMIS allows charities to manage various aspects of the Standing Order process, such as:

- Handling donor commitments – Logged-in public users can make a Standing Order commitment from a simple webpage and staff can add, update, or delete commitments using specialized staff screens.
- Generating expected payments – Staff can run a monthly report that calculates the income expected from each donor so that the non-profit knows how much income is expected from Standing Orders.
- Importing bank payments – On a periodic basis, the non-profit receives or downloads the file that contains information about all of the Standing Order payments it has received from donors. Using iMIS, staff can import and process this information to match bank payments to the expected payments. iMIS gifts are created for each matched payment.

Managing Standing Orders

Use iMIS Standing Orders to manage the following tasks:

- Recording a contact's commitment to donate to your organization by Standing Order.
- Generating a record of the payments your organization expects to receive every month.
- Importing the Standing Order payment file you receive periodically from your organization's bank.
- Matching the payments you received from the bank to the payments you expected to receive.
- Resolving any mismatched payments.

Note: The following steps are based on the default Standing Order configuration shipped with iMIS. If your organization has tailored this feature, your view of the product might not match the documentation.

To record Standing Order commitments, Staff

1. On iMIS Web View, select Contacts > Find contact.
2. Search for and select the iMIS contact who has made the commitment.
3. Navigate to the Standing Order commitments page.

By default, it is located on iMIS Web View from Contacts > Contact management > Recurring donation commitments.

4. Create a new commitment or edit an existing commitment.

   Note: A donor can notify you of their intent to make donations by Standing Order if your organization has implemented the Recurring Donation Commitments Public View (UK) iPart.

   To generate expected payments

1. Navigate to the Expected payments page.

   By default, it is located on iMIS Web View under Donations > Recurring donations.

2. Select a Month/Year and click Generate Expected Payments.

   To import the Standing Order payment file

1. Navigate to the Import Standing Order payment file page.

   By default, it is located on iMIS Web View under Donations > Recurring donations.

2. Select a File Format.

   The file format identifies the structure of the data within the file, so that iMIS can properly import and process the contents. Currently the Standing Order payments file - BACS format is the only supported format (see Supported Standing Order payment file format).

3. Select a file, and then click Upload.

   When you upload a file, it is prepared for processing as a common standing order payment file.

   To match imported payments to expected payments

   Note: The maximum import file size that can be processed depends on many factors, such as memory, processor speed, and load on the server. If you have any problems processing a large file, then we recommend that you break it up into smaller pieces of no more than 1000 transactions per file.

1. From the Files awaiting processing section of the Import Standing Order payment file page, find the file you imported in the list. The file name has been updated with a timestamp.
2. Click Process.

   When you click Process, iMIS compares the information in the imported bank file to the expected payments you have on record. For iMIS to successfully create a donation payment for the correct contact, each of the following items must match up:

- Branch Sort Code
- Bank Account Number
- Match Reference Number
- Donation Amount

  Note: An expected payment record must be generated for the month and year of the bank payment.

  After iMIS does the comparison, one of two scenarios may occur:

- If all items in the bank payment file are matched to expected payments, then:
- A Success - [import file name].log is created in the Log Viewer. The log lists each payment that has been successfully matched. An iMIS gift is created for each successful match.
- The original import file is removed from the Files awaiting processing list.
- If one or more items in the bank payment file could not be matched to expected payments, then:
- A Warnings - [import file name].log is created in the Log Viewer. The log lists each payment that could not be matched and any payments that have been successfully matched. If a Warnings log has been created, you must review the errors and take steps to resolve the payment mismatches. An iMIS gift is created for any successful matches.
- The original import file is removed from the Files awaiting processing list.

- An [import file name] - error - [timestamp].xml file is created in the Files awaiting processing list. This file contains all of the items from the original bank payment file that could not be matched. After resolving the payment mismatches, reprocess this file to complete the import.

  To resolve payment mismatches

1. From the Log Viewer section of the Import Standing Order payment file page, find the Warnings log for the file you are trying to process: Warnings - [import file name].log.
2. Click the arrow on the left to expand the log.

   The log lists each payment that could not be matched and any payments that have been successfully matched.
3. Review the error entries in the list.

   The error log entry describes the problem iMIS encountered, the steps you should take to resolve the problem, and the associated payment data from the bank.
4. Resolve the payment mismatches using the information in the error messages.
5. From the Files awaiting processing section of the Import Standing Order payment file page, process the [import file name] - error - [timestamp].xml file that contains the payments that failed to match.

   If all of the problems have been resolved, a Success - [import file name].log is created in the Log Viewer. However, if there is still a problem matching payments, a new Warnings - [import file name].log is created in the Log Viewer.
6. Repeat the steps above until all payments have been matched.

Supported Standing Order payment file format

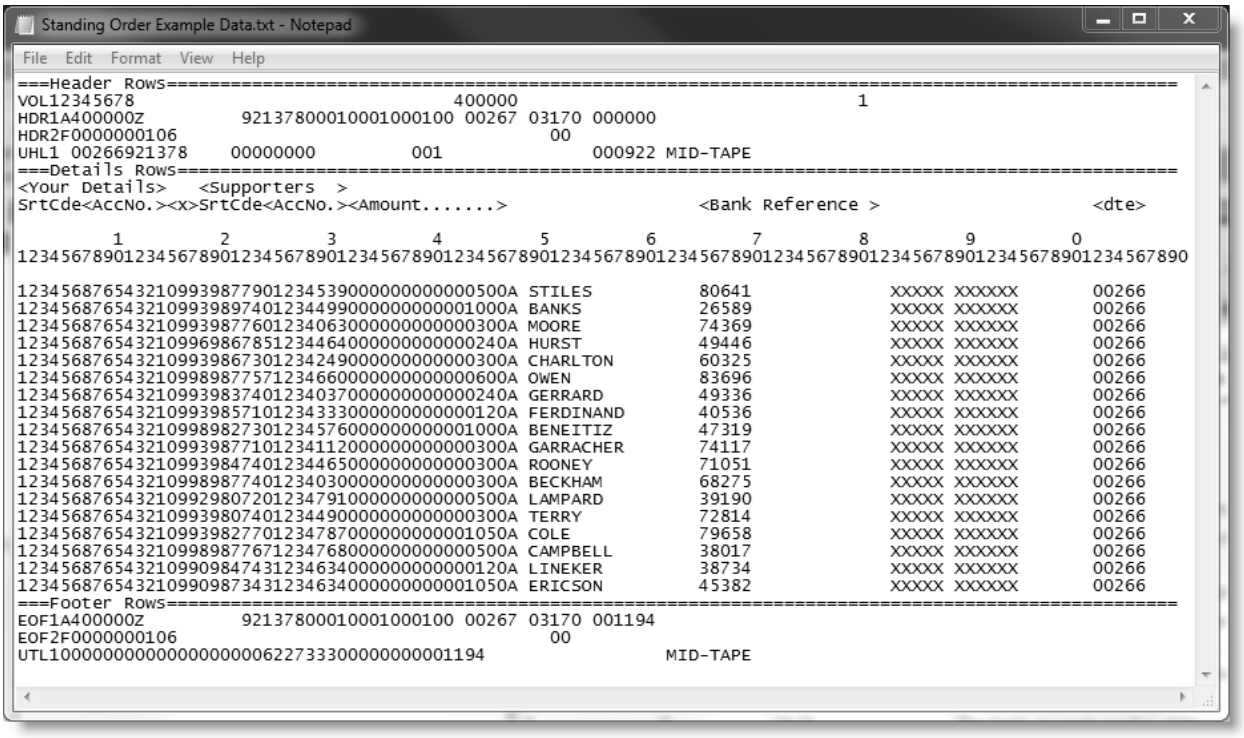
The Standing Order data file from your bank must be in the format described below for iMIS to successfully import the file and to match the payment details to the correct Standing Order commitments. Contact your bank to obtain the Standing Order data file. They should be able to provide you with the software necessary to electronically download the file in the following format.

Note: Header and footer rows in the file are ignored during processing.

Barclays Standard Format Layout 1, 106 character data record

Field Number	Field Size	Character Position	Description
1.	6	1-6	Sort Code of your account-holding branch.
2.	8	7-14	Account Number to which the payment has been applied.
3.	1	15	Account type. Note: Must be 0 for the iMIS import.
4.	2	16-17	Transaction code for the entry type. Note: Must be 99 for the iMIS import.
5.	6	18-23	Sort Code of the bank from which the payment originated.
6.	8	24-31	Account Number of the originating contact.
7.	4	32-35	The mandate identifier assigned by the originating bank. If none, this field is zero-filled.
8.	11	36-46	The amount of the entry in pence, unsigned, right-justified and left zero-filled.
9.	18	47-64	The originating customer name.
10.	18	65-82	The reference number quoted by, or on behalf of, the originating customer. In iMIS, this corresponds to the Match Reference Number. If entered, normally the field is left-justified and space-filled for unused characters.
11.	18	83-100	Space-filled field.
12.	6	101-106	The date the entry was applied to the bank account, in bYYDDD format (b = blank, DDD = Julian date).

Sample Standing Order payment file



Setting up Standing Orders

To set up Standing Orders, you must:

- Configure iMIS batch control for Standing Orders.
- Edit your Web View sitemap to display the Standing Order navigation items.
- Configure the Standing Orders pages.

Note: To use iMIS Standing Orders, the ASISOAHost20 service must be running on the appserver.

Note: The steps below are based on the default Standing Order configuration shipped with iMIS. If your organization has tailored this feature, your view of the product may not match the documentation.

To configure batch control for Standing Orders

To use iMIS Standing Orders, you must set up your AR/Cash batch control to enable either Auto Sequential Batch Numbers or Auto Date Batch Numbers, if one of these options is not already selected.

After you match the Standing Order payments you receive from the bank to the payments you expected to receive, an iMIS gift is created and automatically placed in system-generated Internet batches that are created based on the date the match was made. All of the transactions from a single day are placed in a batch with the same date. If today's Internet batch is closed, and a new Standing Order transaction takes place, a new batch is created with today's date.

To display the Standing Order navigation items

Go to RiSE > Site designer > Manage sitemaps:

1. From the drop-down menu above the sitemap tree, select iMIS Web View.
2. Reveal the Standing Order commitments navigation item. In the sitemap tree, select Contacts > Contact management > Standing Order commitments.
3. From the toolbar, click Edit.
4. (Options tab) Clear the This navigation item is hidden checkbox.
5. Click Save.
6. Close the window.
7. From the toolbar, click Publish. The Standing Order commitments page is displayed on iMIS Web View.
8. Reveal the Recurring donations navigation item. In the sitemap tree, select Donations > Recurring donations.
9. From the toolbar, click Edit.
10. (Options tab) Clear the This navigation item is hidden checkbox.
11. Click Save.
12. Close the window.
13. From the toolbar, click Publish. The Standing Order navigation items listed under Recurring donations are displayed on iMIS Web View.

To configure the Standing Order pages

iMIS Standing Orders is built using content records and iParts (Concept: content records, iParts, and content types) that you can configure for the needs of your organization.

By default, iMIS Standing Orders is comprised of the following:

An authenticated public user can commit to a Standing Order donation from a simple webpage. This feature is not set up by default. You can add this iPart to your public WCM website.	(none)	(none)	ContentTypes/Offering/Recurring Donation Commitments Public View
The default Thank You page that displays after a public user	(none)	@/iCore/Fundraising/Standing Order Thank You Page	(none)

makes a Standing Order commitment.			
Staff can add, update, or delete standing orders from a detailed view of the commitment. Before using this content for the first time, you must configure the iPart to select a default Payment Method.	Contacts > Contact management > Standing Order commitments	@/iCore/Fundraising/Recurring donation commitments	ContentTypes/Offering/Recurring Donation Commitments
Staff can generate expected Standing	Donations > Recurring donations > Expected	@/iCore/Fundraising/Expected payments	ContentTypes/Commerce/Recurring Donation Expected Payments

Order payments for a given month.	payments		
Staff can import and process Standing Order payment files received from your organization's bank.	Donations > Recurring donations > Import Standing Order payment file	@/iCore/Fundraising/Import Standing Order payment file	ContentTypes/Utility/File Importer For Web Services ContentTypes/Utility/File Viewer For Web Services ContentTypes/Utility/Log Viewer For Web Services

General Ledger Interfaces

Implementing General Ledger Interfaces

For each GL interface, you may be required to set the general ledger options in iMIS, create a lookup validation table in iMIS, create the export file, and import the data into the general ledger. For detailed information on setting the general ledger options in the AR/Cash General Ledger Interface window in iMIS, see Configuring the general ledger interface.

List of supported and unsupported interfaces

Supported interfaces

ASI supports the following interfaces through iMIS updates by updating our exports as these products change their import requirements.

- ACCPAC for Windows
- Fundware
- Great Plains Dynamics
- Great Plains Enterprise (CS+)
- MIP Non Profit Series
- MAS90 (Sage)
- Peachtree Windows
- Quick Books Pro
- Great Plains Dynamics
- Great Plains Enterprise (CS+)
- SQL Financials
- Solomon IV

Unsupported interfaces

ASI does not support for following interfaces. These options are not removed from the iMIS menu, but iMIS is not updated to match subsequent releases of these products that change their import format requirements.

If you depend on one of these interfaces, please note the role of the Generic General Ledger Conversion Program.

Solomon IV

SQL Financials

Access Accounts

Accounting Vision

AccPac Plus (DOS)

Business Works

Deltek

Exact

Great Plains DOS

Macola

Peachtree MAC

Platinum for Windows/SQL

Sage Sterling

SBT

Solomon III

Solomon III

Accounting Vision

Great Plains DOS

Solomon III Betrieve

Generic General Ledger Conversion Program

ASI has developed numerous General Ledger (GL) interfaces to work with popular third-party accounting software packages. See ASI Support for the list of supported interfaces and the support policy.

If you are integrating to an accounting package that is not included in the list of GL Interface types supported by iMIS, you can use the Generic GL Interface and the Visual Basic (VB) Conversion Template.

The Generic GL Interface creates a standard generic export file. The VB Conversion Template reads this file and reformats the data as you specify. The advantages of using the VB Conversion Template include:

- You do not have to write a VB program to convert data; simply modify the template to meet your requirements.
- After you modify the template to meet your requirements, you can run it within iMIS during month-end procedures. No additional interface is needed to do this.

To perform a GL export with the Generic GL Interface and VB Conversion template, you must have an iMIS FSI license and you must install Microsoft Visual Basic runtime. To obtain a license, please contact your Reseller or ASI.

To use the Generic GL Interface and the VB Conversion Template

The Generic GL Interface and the VB Conversion Template are used together to create an export file that is formatted to your specifications. To use these products:

1. Create a generic export file with the Generic GL Interface.
2. Modify the VB Conversion Template for your data requirements.
3. Test the modified VB conversion program (outside iMIS).

4. Run the VB conversion program in iMIS to modify the generic export file.
5. Check the results.

To create a generic export file

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Generic or Generic 2000. The Generic type uses a 2-digit year format. The Generic 2000 type uses a 4-digit year format.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output file path/name of the export/import file to be used by the conversion program when the GL Interface runs.
6. Click Save.
7. To create the generic export file, select AR/Cash > Process month-end procedures, and click Create GL Journal. You should see one export file:

   generic.txt (standard generic layout)

   The generic export file is generated, as in the following example:

   "iMIS","8",1,04/03/2011,04032011,20110403,"1-1100",,"","000403-8","000403-8: DEMO Cash Receipt",150.00,150.00,0.00

   "iMIS","8",2,04/03/2011,04032011,20110403,"1-4000",,"","000403-8","000403-8: DEMO-MEETING-BAMS/MAIN",-150.00,0.00,150.00

To modify the VB Conversion Template

1. Launch Visual Basic.
2. Double-click the Generic GL/GenGL.exe file from the iMIS CD to the desired project folder location. Double-click the GLIntConversion.vbp file to open it in Visual Basic.
3. Make layout modifications to the ts.write line in the WriteOut() procedure.

4. (Optional) Make other modifications to the VB Conversion Template if the GL package has other requirements. For example, some GL packages require an additional header record or limit the number of transactions per file.

   To test the modified program outside of iMIS

   To make sure the modified VB conversion program is correct, test it outside of iMIS.

1. Run the standard Generic or Generic 2000 interface in iMIS to produce a test export file. Do not fill in the Conversion Program File Path/Name.
2. Create a batch file:

1. Open an editor, such as Notepad.
2. Enter the command to call the VB Conversion Template executable file and include the path of your standard generic output file. For example:

   C:\glinterface\glintconversion.exe C:\glinterface\generic.txt
3. Save the file with a .bat extension.
4. Double-click the .bat file to run the program.
5. If the program completes and the Visual Basic syntax is correct, a .bak file is created, for example: C:\glinterface\generic.bak
6. Make sure the .bak file has a more recent date or timestamp than its corresponding generic export file.
7. Compare the .bak file to the generic export file to make sure all records in the generic export file are also included in the .bak file.
8. Import the .bak file into the GL package to make sure it works correctly.

   To run the VB conversion program in iMIS

   ASI recommends that you test on a demo database within iMIS and make a backup before beginning the conversion process.

1. Note: The VB conversion program runs after the generic export file is created; therefore, all transactions included in the generic export file are marked as posted and sent to GL in iMIS before the VB conversion program executes. If the program fails, restore from a backup or use the batch file created in the previous procedure to convert the file outside iMIS.
2. Enter the conversion program file path in AR/Cash > Set up module > GL Interface > Output file path/name.
3. To create the generic export file, select AR/Cash > Process month-end procedures, and click Create GL Journal. You should see two export files:

- generic.txt (standard generic layout)
- generic.bak (VB Conversion Template layout)

To check the conversion

Check the conversion to make sure iMIS finds the correct executable program and to verify that the correct records are being exported.

1. Make sure the .bak file has a more recent date or timestamp than its corresponding generic export file.
2. Compare the .bak file to the generic export file to make sure all records in the generic export file are also included in the .bak file.

Supported Interfaces

ACCPAC for Windows

iMIS provides support to meet export requirements for ACCPAC for Windows version 2.0A or greater. This support is in place in iMIS LAN as of version 3.50b and iMIS as of version 4.01.

To set up iMIS for ACCPAC

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.

2. Click Edit.
3. From the GL interface type drop-down list, select ACCPAC for Windows.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.
6. Click Save.

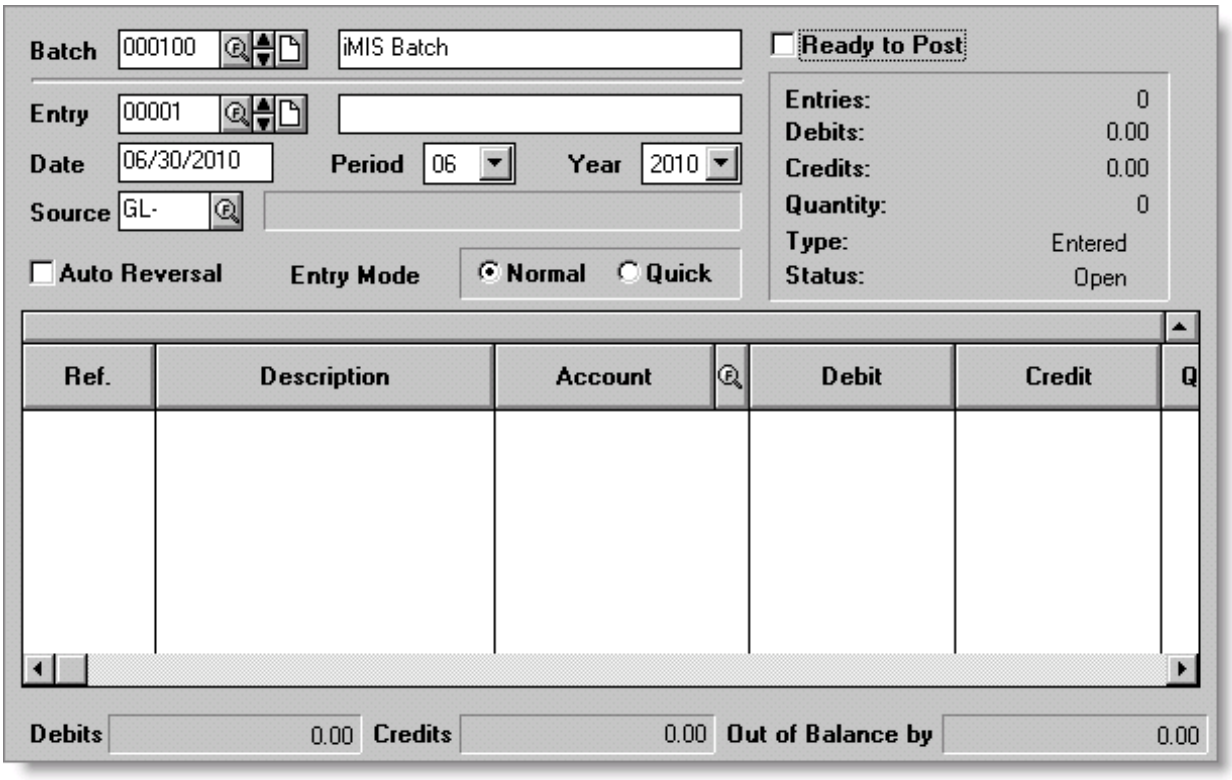
Note: No ACCPAC for Windows setup steps are required.

To create the export file from iMIS (ACCPAC)

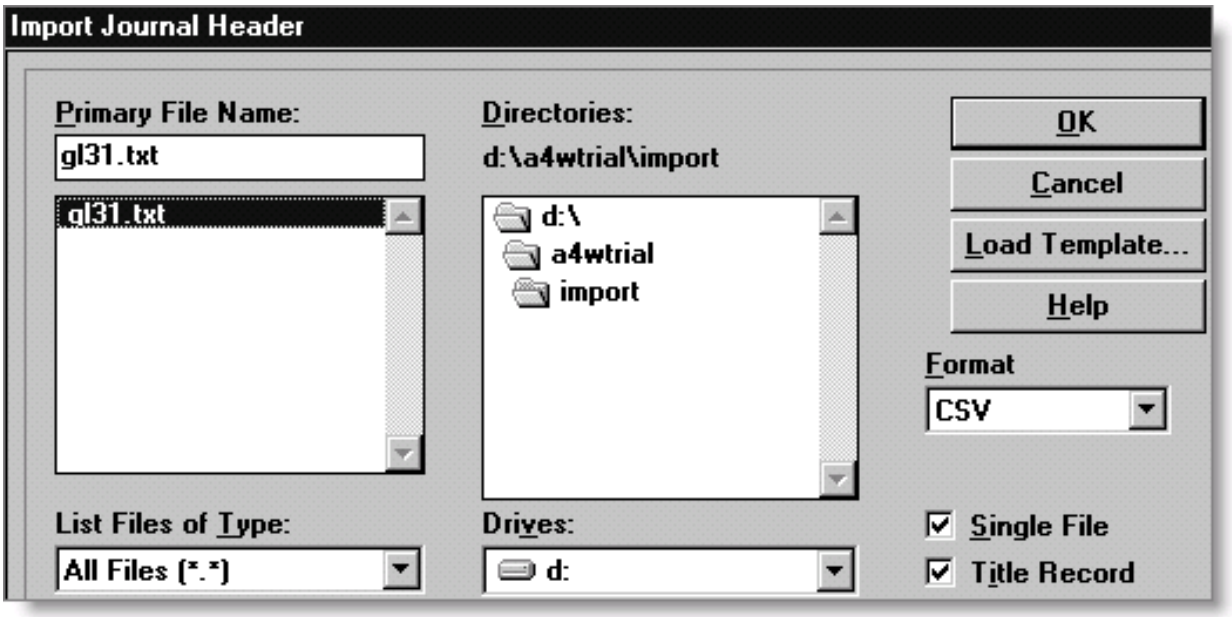
1. Select AR/Cash > Process month end procedures > Create GL Journal to generate the general ledger transaction export files.

To import data into ACCPAC

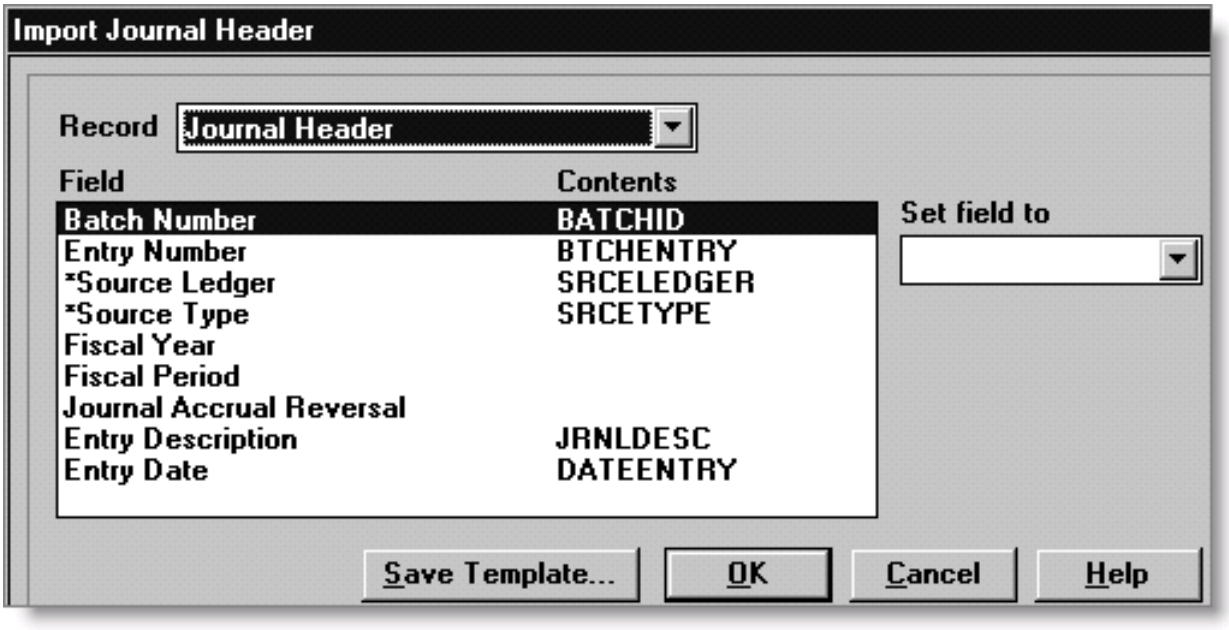
1. Open the G/L Journal Entry window.
2. Press the icon to assign a new Batch and fill in an appropriate description in the text box next to the batch number.



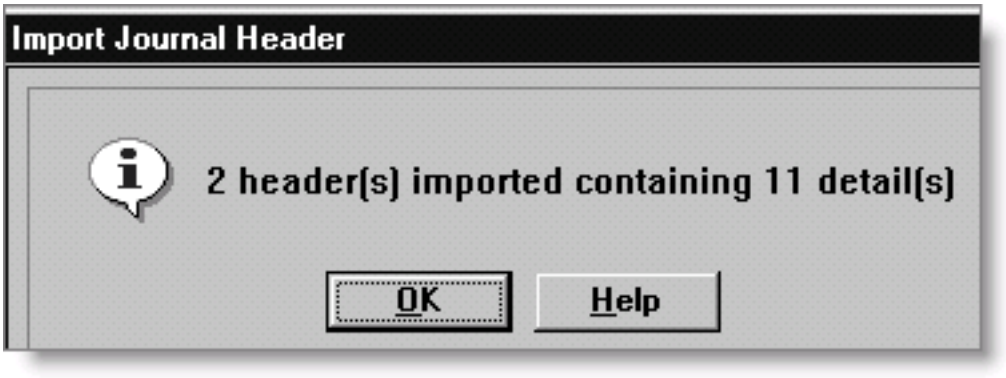
3. Select File > Import.
4. In the dialog box, navigate to and select the correct iMIS import/export file, maintaining all default options.



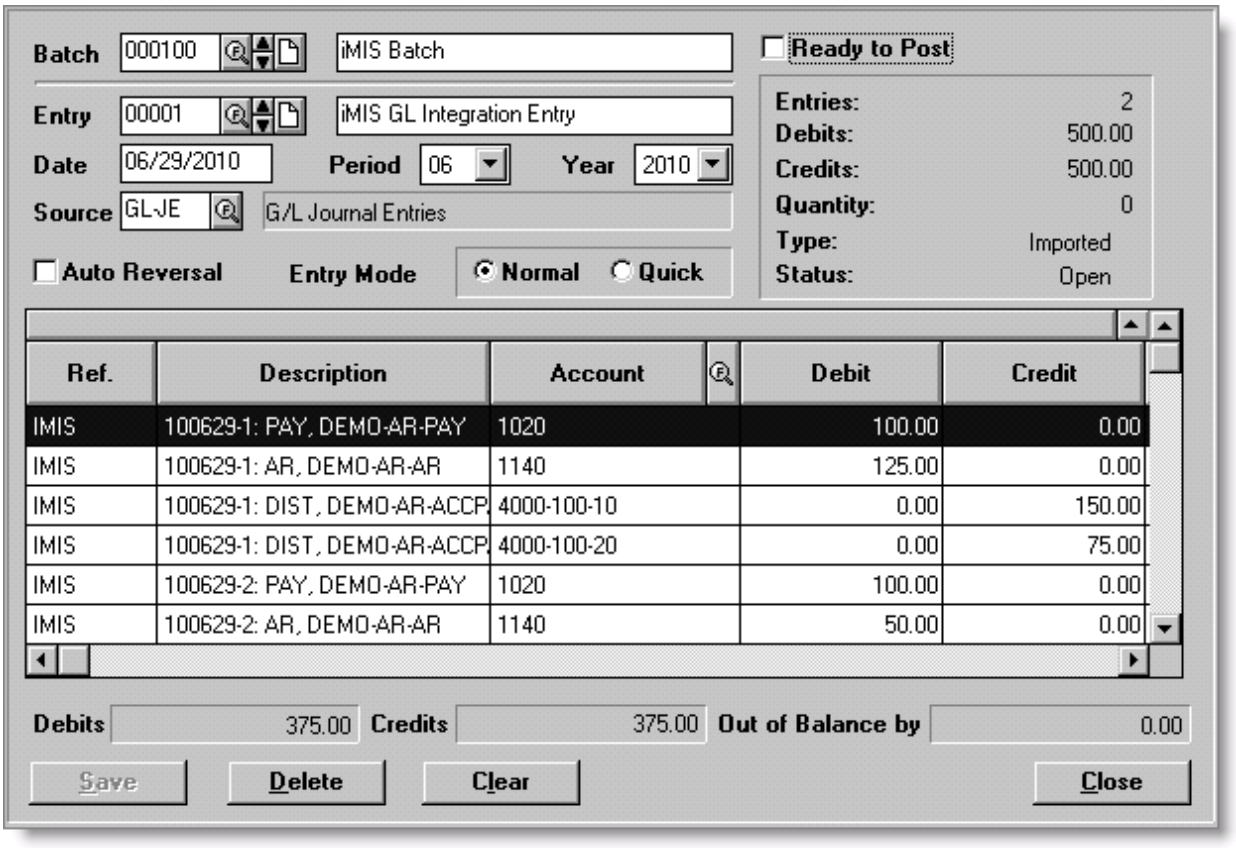
5. A second dialog box appears, based upon the field information in the import/export file (both for the Journal Header and Journal Detail portion contained in the single file).
6. Click OK to proceed with the import.



7. The import process proceeds. When it successfully finishes, a message such as the following displays.



8. Click OK to continue. The imported journal entries display in the journal entry window.



Print and post the iMIS batch with normal processing procedures.

Note: ACCPAC for Windows will always default the fiscal period for the imported transactions to the current or active fiscal period

Export/Import File Example

The export/import file is a two-tiered, comma-delimited file with initial title records listing the internal ACCPAC field names that correspond to the data columns. iMIS generates a separate journal entry for each transaction date that contains transaction data in the export/import file. Each exported journal entry contains a separate, single journal header record and multiple journal detail records.

The following export/import example shows a small interface file covering the period of 6/29/2010 thru 6/30/2010. The file, which was generated using the “Batch” summary level, contains two separate journal entries, one for each day for which transactions were exported.

RECTYPE,BATCHID,BTCHENTRY,SRCELEDGER,SRCETYPE,JRNLDESC,DATEEN-
TRY

RECTYPE,BATCHNBR,JOURNALID,TRANSNBR,ACCTID,TRANSAMT,TRANSDESC,-
TRANSDATE,TRANSREF

1,1,1,GL,JE,"iMIS GL Integration Entry",20100629

2,1,1,1,1020,100.00,"100629-1: PAY, DEMO-AR-PAY",20100629,IMIS

2,1,1,1,1140,125.00,"100629-1: AR, DEMO-AR-AR",20100629,IMIS

2,1,1,1,400010010,-150.00,"100629-1: DIST, DEMO-AR-ACCPAC",20100629,IMIS

2,1,1,1,400010020,-75.00,"100629-1: DIST, DEMO-AR-ACCPAC",20100629,IMIS

2,1,1,1,1020,100.00,"100629-2: PAY, DEMO-AR-PAY",20100629,IMIS

2,1,1,1,1140,50.00,"100629-2: AR, DEMO-AR-AR",20100629,IMIS

2,1,1,1,400010020,-150.00,"100629-2: DIST, DEMO-AR-ACCPAC",20100629,IMIS

1,1,2,GL,JE,"iMIS GL Integration Entry",20100630

2,1,2,1,1020,100.00,"100630-1: PAY, DEMO-AR-PAY",20100630,IMIS

2,1,2,1,1140,25.00,"100630-1: AR, DEMO-AR-AR",20100630,IMIS

2,1,2,1,400010010,-50.00,"100630-1: DIST, DEMO-AR-ACCPAC",20100630,IMIS

2,1,2,1,400010020,-75.00,"100630-1: DIST, DEMO-AR-ACCPAC",20100630,IMIS

FundWare

iMIS Financial Systems (GL) Interface module now provides support to meet import requirements for FundWare DOS version 5.50 or greater. This support is in place in iMIS as of version 4.10.

To set up iMIS for FundWare

The setup steps from iMIS include making appropriate choices on the AR/Cash General Ledger Interface window and an optional step to establish a FUNDWARE general/lookup validation table.

The iMIS setup steps are described in detail below:

Step 1 – Change the GL Interface Type

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select FundWare.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored. FundWare specifically looks in the AFW\DATA directory for a file name of GL000X.y where X corresponds to the terminal number. For example, c:\afw\data\gl0001.y assumes a terminal number of 1.
6. Click Save.

Step 2 – Set up a special FUNDWARE General Lookup/Validation Table

This step is required if you need to map each iMIS organization code to the FundWare Division code. As the Division code is an integral part of the export file, this step is crucial unless the iMIS organization or entity code already matches the FundWare Division code. It is very possible, especially in the case of multiple funds that more than one iMIS entity (i.e., Fund) may map to a single FundWare Division code.

If the table is properly set up and the output file name contains the substitute character #, the FundWare division, not the iMIS entity, will be the key factor in determining the splitting and generation of the output files.

Note: You do not have to create separate files (i.e., include a # in the output file name) if you have a single legal entity but multiple funds. iMIS treats funds as separate entities, but they are only handled in separate sets of books, not separate files, within FundWare. However, if iMIS transactions may cross over multiple Divisions, it is mandatory to create separate files per division (include the # separator symbol).

1. From Customers, select Set up tables > General lookup/validation to open the General lookup/validation window.
2. Select (New Table) from the list of table types. The New Table Type window opens.
3. Enter a New Table named FUNDWARE and click Save.
4. Click New and insert a record for each iMIS organization code, filling in the organization code in the Code field.
5. In the Expansion field, enter the appropriate FundWare Division code.
6. Click Save.

To set up FundWare

In FundWare, you will need to establish a special iMIS journal. The setup within FundWare includes a simple step to set up a special iMIS customer account to which all accounts receivable amounts will be linked.

1. From the General Ledger menu, choose Setup (7) > Define Journal Controls (5).
2. Enter A to Add.
3. Fill in the values as shown below.

Description: iMIS Journal Entry

Desc title: IMIS

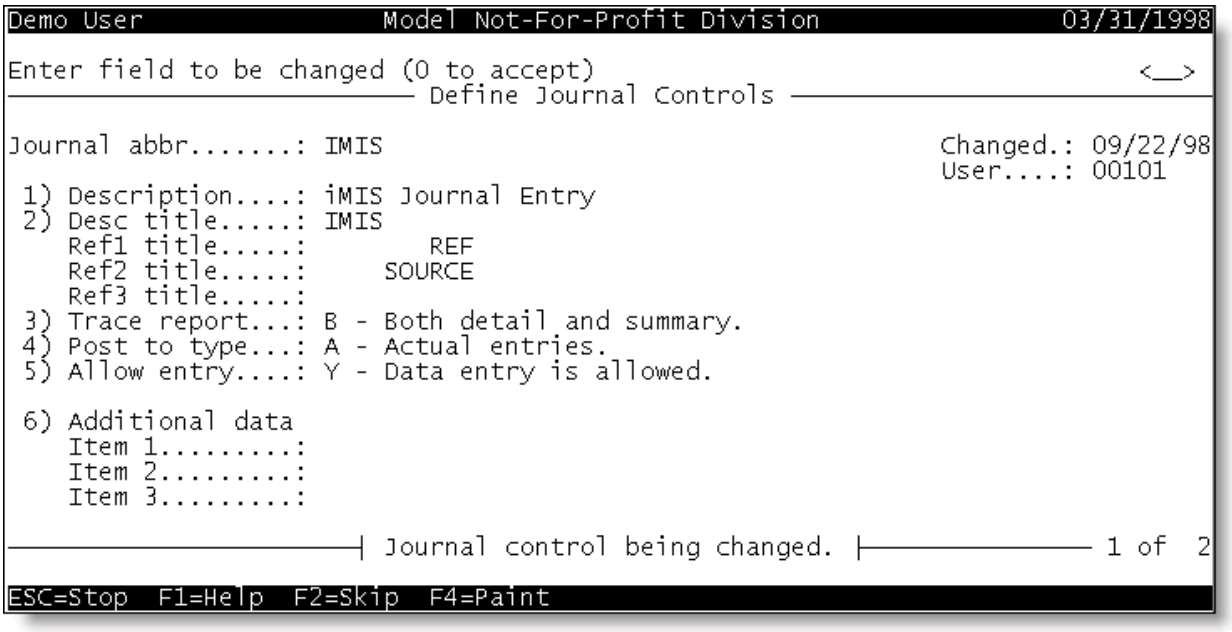
Ref1 Title: REF

Ref2: SOURCE

Trace report: B – Both detail and summary

Post to type: A – Actual entries

Allow entry: Y – Data entry is allowed.



To create the export file from iMIS (Fundware)

1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

To import data into Fundware

1. From the Administration menu, select Special Processing (5).
2. From the Special Processing menu, select Run Program (8)
3. Type GLS018 at the Program prompt and press Enter.
4. Type Y at the “Is above correct?” message.

The import process will begin and a message should appear giving you the assigned batch code and the filing report name. The filing report, similar to the one displayed below, should be located in the AFW\DATA directory:

Run date: 03/13/11 @ 13:31 Model Not-For-Profit Division

Bus date: 01/14/2011 * * * Journal entry trace * * *

CS00208.L96 Page 1

Jnl Description / Addnl data items Ref 1 Ref 2 Ref 3 Rate / Resrce Units Amount / Rate Posted amount

=== ========== ===== ===== ==== ========== === ========== ============

IMIS 110114-1: FNDW Cash Receipt 110114-1 IMIS

A01 00-00 1110

IMIS 110114-1: FNDW-AR-AR 110114-1 IMIS 50.00

A01 00-00 1210

IMIS 110114-1: FNDW-AR-FW1 110114-1 IMIS

A01 00-00 4110

IMIS 110114-1: FNDW-AR-FW2 110114-1 IMIS

A01 00-00 4110

IMIS 110114-1: FNDW-AR-FW3 110114-1 IMIS

A01 00-00 4150

Batch 208 posted on 03/13/11 by for business date 01/14/2011

Run date: 03/13/11 @ 13:31 Model Not-For-Profit Division

Bus date: 01/14/2011 * * * Journal entry trace * * *

Jnl Period Account Description Debit Credit Balance

===== ======= ========== ========== ========== ========== ========== ========

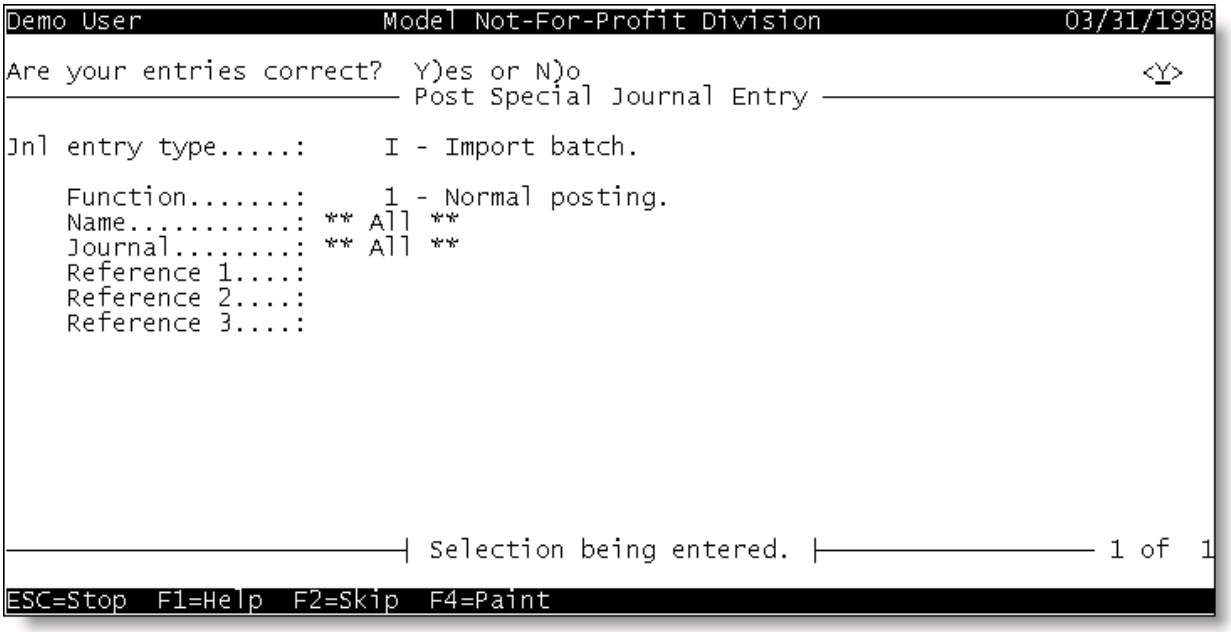
IMIS iMIS Journal Entry

01 2011 A01 00-00 1110 Cash in Bank - Banko Uno 80.00

```
01 2011    A01 00-00 1210        Accounts Receivable              50.00
  01 2011    A01 00-00 4110        Contributions                          110.00
  01 2011    A01 00-00 4150        Annual giving campaigns                 20.00
    Total for Financial Reporting System          130.00      130.00      .00
Batch   208 posted on 03/13/11 by     for business date 01/14/2011
Number of lines printed =     27              *** End of report ***
```

The imported data is used to create unposted general journal transactions. Once imported, the data can be posted through the following steps:

1. From the General Ledger menu, choose Transaction Entry (3).
2. From the Transaction Entry menu, choose Post Special Journal Entry (8).
3. Type I for Jnl Entry Type, 1 for Function and fill in the remaining fields, as appropriate



Export/Import File Example

The export/import file is a simple fixed file export/import file that contains a single heading line for the Division (one file per Division), a document header line for each new

transaction created, and detail document lines for each debit or credit entry in the document or transaction.

iMIS will generate a new journal entry and Document Number each time the following is encountered:

- A new transaction date (for Day or Detail summary methods)
- A new batch (for Batch summary methods)

The following export/import example shows a small interface file for two batches across two dates.

DIV=96 SEP=|

1|IMIS|03/15/2011|

4|A01 00-00 1110|110315-1: FNDW Cash Receipt|980310-1|IMIS||120.00|

4|A01 00-00 1210|110315-1: FNDW-AR-AR|110315-1|IMIS||160.00|

4|A01 00-00 4110|110315-1: FNDW-AR-FW1|110315-1|IMIS||-200.00|

4|A01 00-00 4110|110315-1: FNDW-AR-FW2|110315-1|IMIS||-60.00|

4|A01 00-00 4150|110315-1: FNDW-AR-FW3|110315-1|IMIS||-20.00|

1|IMIS|03/16/2011|

4|A01 00-00 1110|110316-1: FNDW Cash Receipt|110316-1|IMIS||80.00|

4|A01 00-00 1210|110316-1: FNDW-AR-AR|110316-1|IMIS||50.00|

4|A01 00-00 4110|110316-1: FNDW-AR-FW1|110316-1|IMIS||-50.00|

4|A01 00-00 4110|110316-1: FNDW-AR-FW2|110316-1|IMIS||-60.00|

4|A01 00-00 4150|110316-1: FNDW-AR-FW3|110316-1|IMIS||-20.00|

Great Plains Dynamics - Integration Manager

iMIS provides support to meet export requirements for Great Plains Dynamics version 5.0 or greater with the Integration Manager. This support is in place in iMIS version 4.11 and

later and iMIS LAN version 3.52 and later.

Note: Address line 3, which was added in iMIS 10.6, is supported for AP refunds in iMIS 15.x export files but not in iMIS 10.6.x export files.

To set up iMIS for Dynamics

This document provides some implementation setup steps for integrating iMIS with Dynamics using the Integration Manager. Also included are the instructions for importing the iMIS export/import files into Dynamics.

On the Dynamics side, follow the steps in the Dynamics Integration Manager setup instructions.

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Dynamics 5.0. The Taylor and Taylor OIM choices remain for those users who have not upgraded from older versions of Dynamics and Taylor GL Integration Kit (GLIK). If you use Dynamics version 3.15 through 4.0, select Taylor OIM. If you use an earlier version of Dynamics, select Taylor.
4. You also may need to modify the Output file path/name to dictate the naming and placement of the output files. The Output file path/name you enter in iMIS AR/Cash GL Interface should agree with the path and file name that you enter for your Query in the Dynamics Integration Manager (DIM).
5. The Dynamics Integration Manager requires two import files: a header file and a detail transaction file. iMIS correctly exports the two needed files, but it provides a single Output file path/name data entry box for naming the General Ledger export files. iMIS assigns the name you specify as the Path/Name in setup to the detail transaction file. It names the header file the same, except that it appends the letter H to the end of the specified name. For example, if you enter a path/file name of C:\TEMP\GLINT.TXT, iMIS creates a file named GLINT.TXT for the transaction export and a file named GLINTH.TXT for the

header export file.

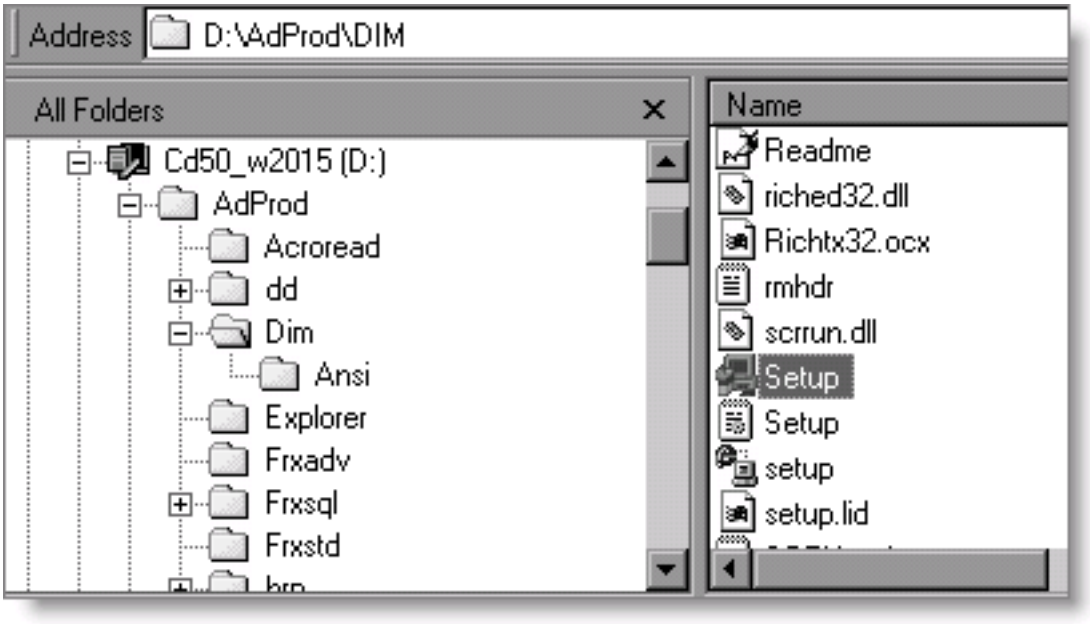
6. Click Save.

To set up Dynamics Integration Manager

The following instructions were established with the assumption that Dynamics has been fully installed/upgraded and is functioning properly. Dynamics must be installed before the following steps can be performed. Refer to the Dynamics Installation Procedures manual if you need assistance installing Dynamics.

Note: Be sure to enter your new or revised Dynamics registration keys at the appropriate point during the Dynamics install or upgrade. These keys make it possible for you to access the Integration Manager after it is properly installed.

Execute Setup.exe located in the AdProd\Dim directory of the Dynamics Installation CD. Follow the installation instructions in the Dynamics Integration Manager manual.



1. Launch Dynamics and answer Yes to include the new code.
2. If necessary, fine-tune the directory and/or file name for the export/import files.

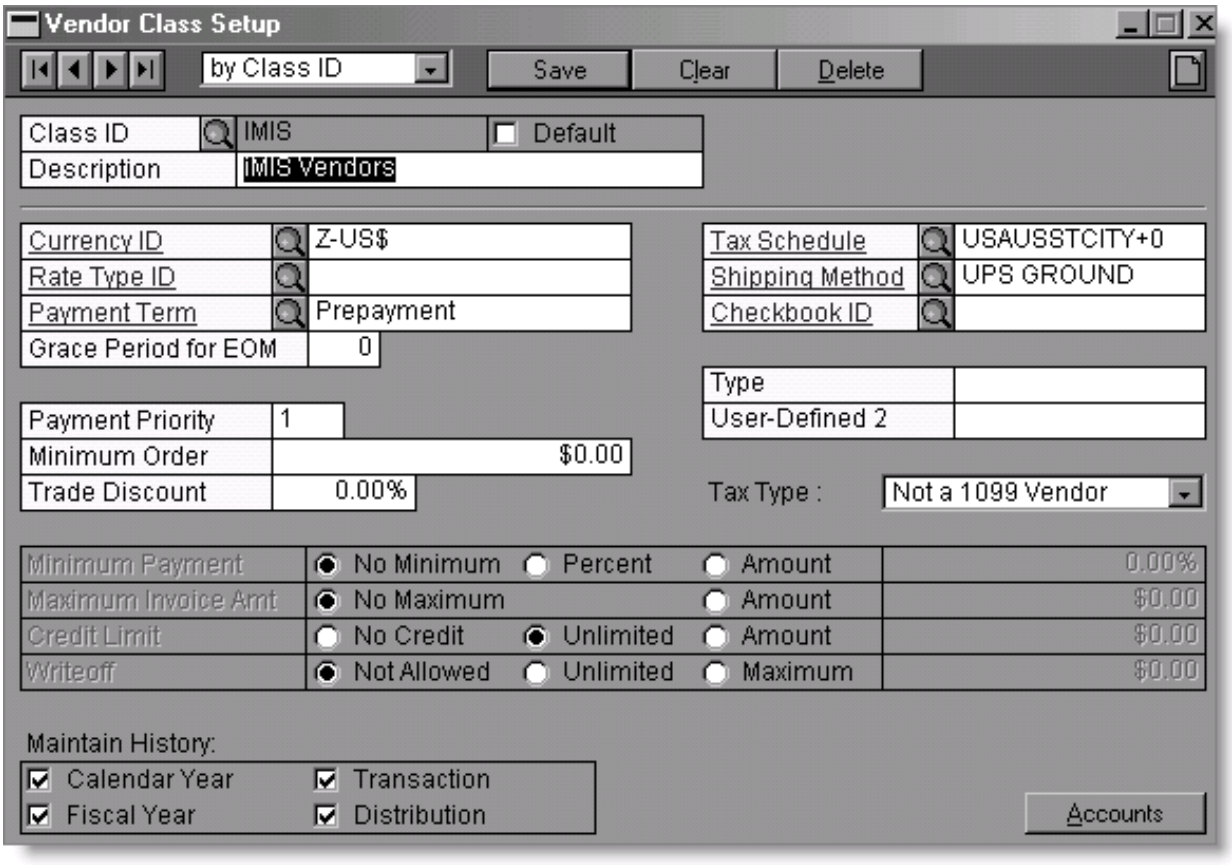
- Use an iMIS Integration to import accounting data from the export file generated by the iMIS GL Interface and AP Interface. To use an iMIS Integration, perform the following steps:
- Make a backup of your existing IM.MDB. This is an Access database that is distributed with the Dynamics Integration Manager 5.0. It contains consolidated information regarding integrations and queries for use by the DIM. It is located under the \..\Dynamics\IM\ folder of your Dynamics 5.0 installation.
- Copy and paste the IM.MDB file from the iMIS CD to \..\Dynamics\IM\.
- If your iMIS setup is complete, you are now ready to begin exporting iMIS GL and AP transactions and to run iMIS integrations in Dynamics.

3. (AP Interface only) In some circumstances, you may want to set up a special iMIS vendor classification (for example, to change the due date calculation). In this case, make a slight modification to the existing vendor interface setup.

   To change a Vendor Class (AP Interface Only)

   The iMIS-to-Dynamics setup tables are currently set so that all imported vendor records default to the default Vendor Class. If you wish, you can establish a special iMIS class (for example, to alter the payment terms) and make a minor modification so that all iMIS vendors receive this special classification.

1. Select Setup > Purchasing > Vendor Class and insert a new iMIS vendor class. The Vendor Class Setup window opens.
2. Click Insert on the left palette.
3. Enter the appropriate information in the setup fields.



To set up the Dynamics import/export files

The setup instructions are looking for specifically named export files in specific directory locations. If possible, create the specified directory and be sure to specify the same directory and file names in the iMIS setup.

The built-in external file names for the GL Interface are set as:

- GL Header Import File: C:\DYNAMICS\SYSTEM\GLINTH.TXT
- GL Transaction Line File: C:\DYNAMICS\SYSTEM\GLINT.TXT

The built-in external file names for the AP Interface are set as:

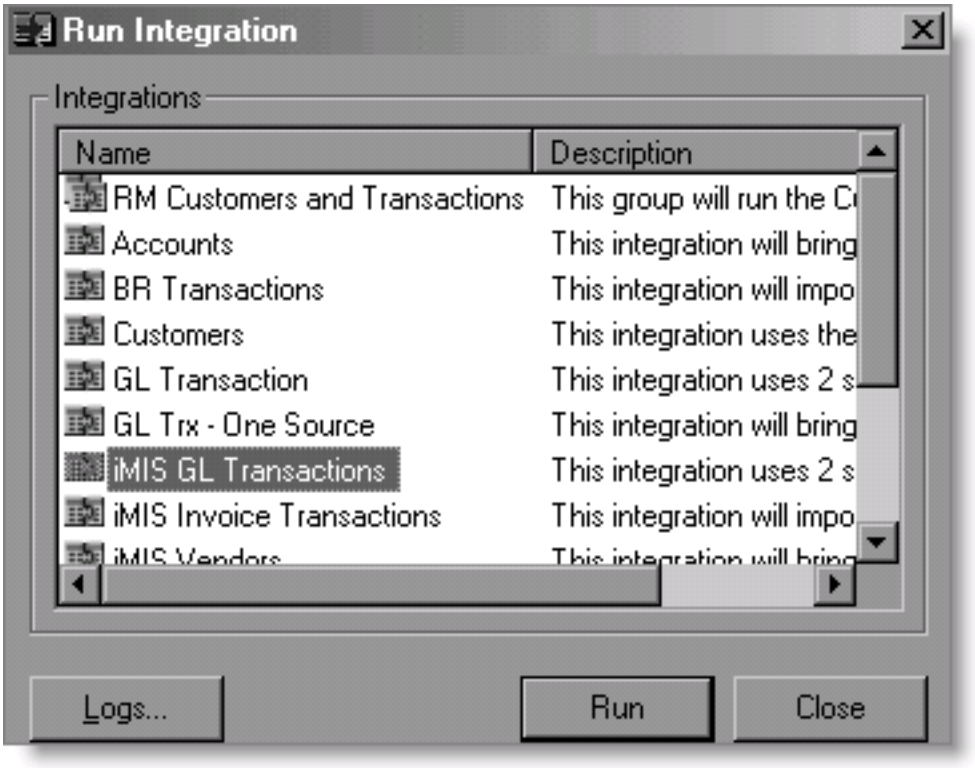
- Vendor Import File: C:\DYNAMICS\SYSTEM\VENDOR.TXT
- GL Transaction Line File: C:\DYNAMICS\SYSTEM\INVOICE.TXT

If you can maintain the file name but change the directory location, you can use the Pathname Translation tab under Tools > Options in the Dynamics Integration Manager to reroute the directory location that the iMIS Location ID points to. See the Dynamics Integration Manager manual.

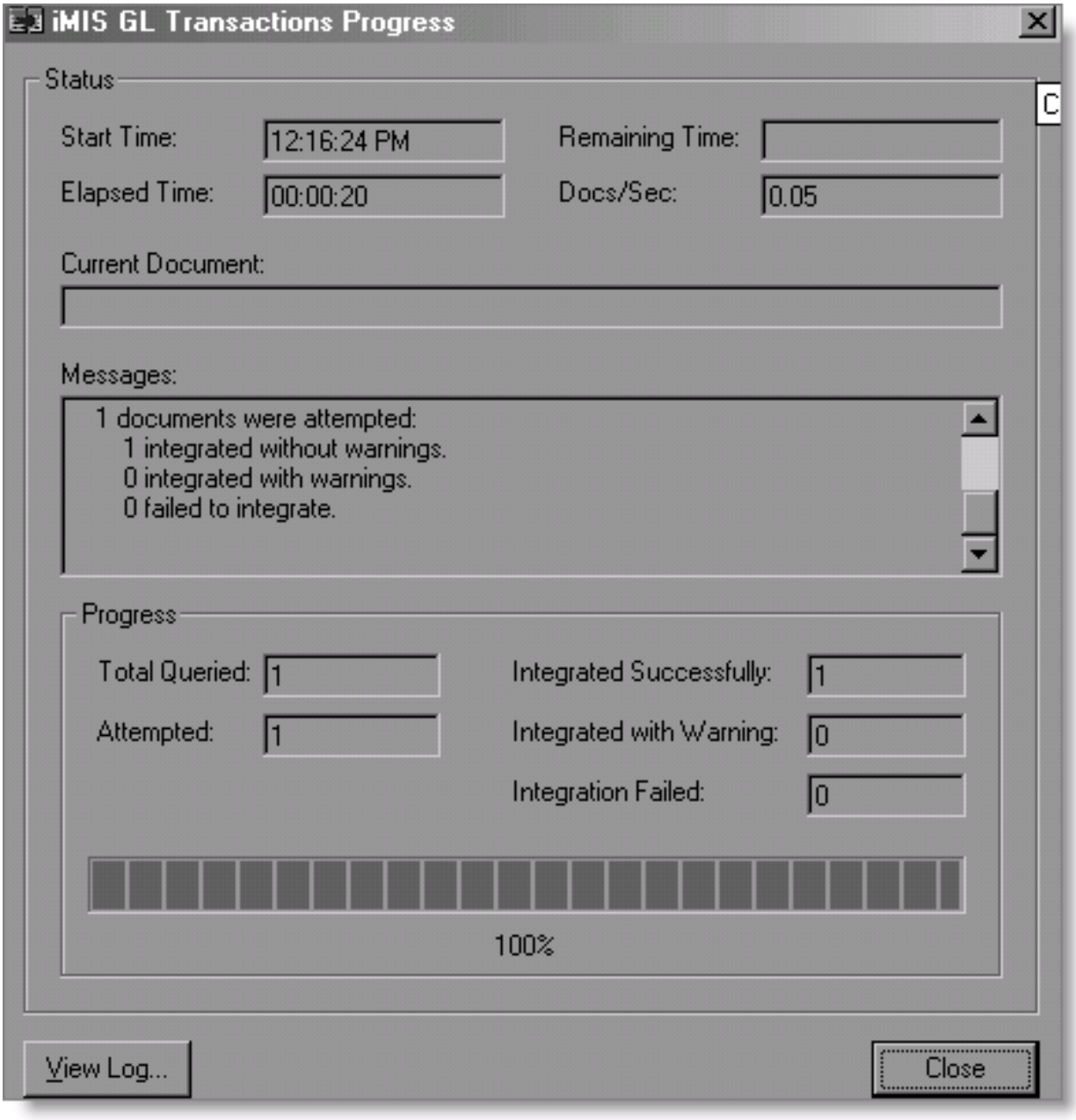
If you are operating in a multi-entity situation within iMIS (for example, the entity code becomes a part of the export file name: GL#.TXT translates to GLDEMO.TXT, etc.), you can modify the import/export file name directly and no special setup provisions are required for DIM version 5.0.

To run an iMIS GL transactions integration

1. Launch Dynamics 5.0.
2. Select Tools > Integrate > Run Integration. The Run Integration window opens.
3. Double-click iMIS GL Transactions.



As the integration runs, Dynamics 5.0 temporarily disappears, but reappears when the integration is complete. The iMIS GL Transactions Progress window opens.

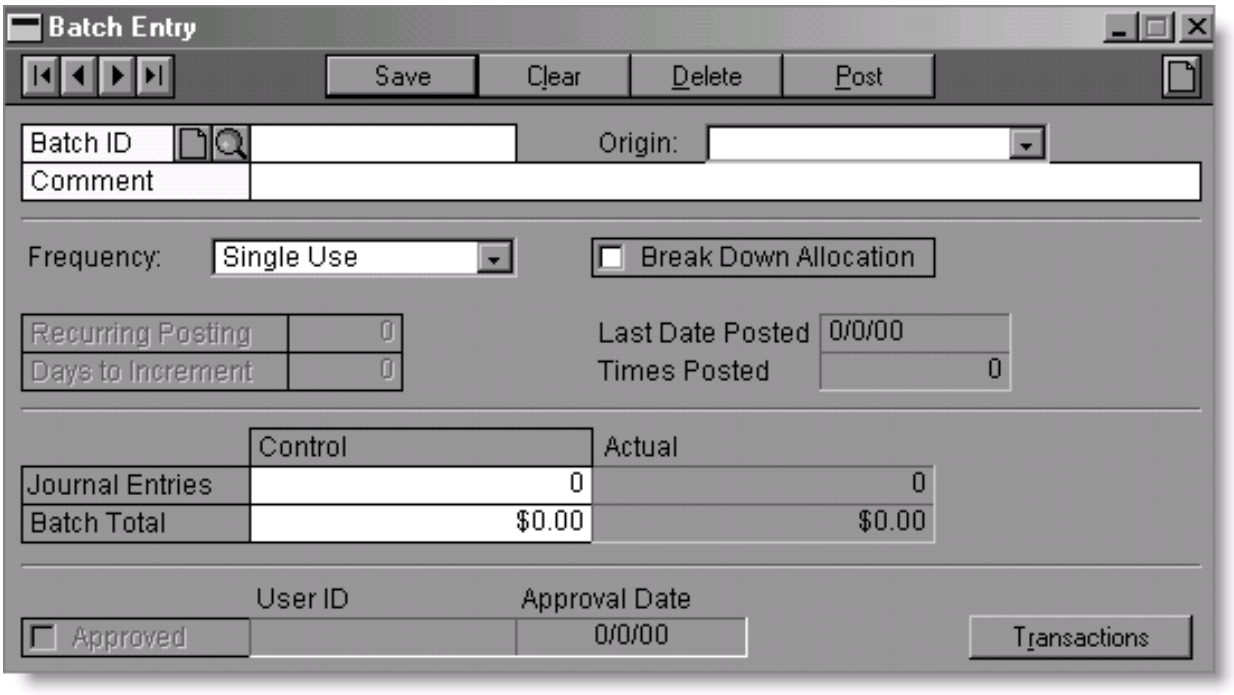


1. If the integration was successful, click Close. Otherwise, click View Log... to examine the error log.

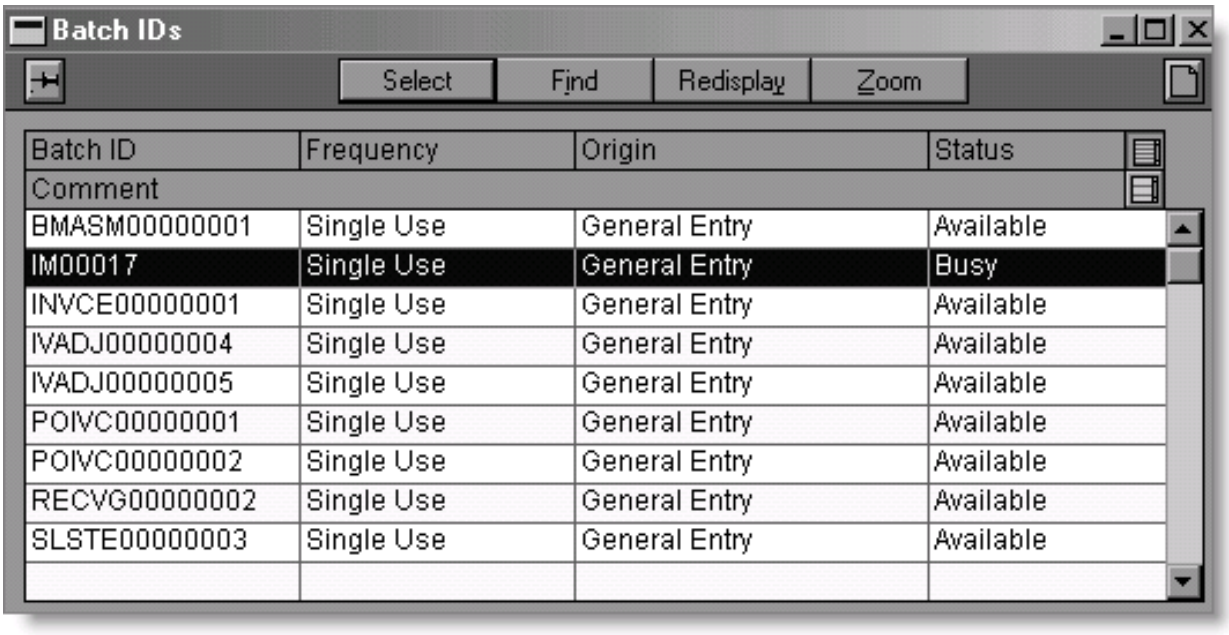
   Note: One of the most likely reasons that integration fails is invalid data (such as account numbers that do not match the required format and segmentation specified in Dynamics

5.0 during initial installation). If this is the case, review your account numbering scheme for compatibility in Dynamics and iMIS.

2. Verify that the integration of iMIS GL transactions was successful from within Dynamics 5.0: select Transactions > Financial > Batches. The Batch Entry window opens.



3. Click the magnifying glass icon for Batch ID to display a listing of Batch IDs.

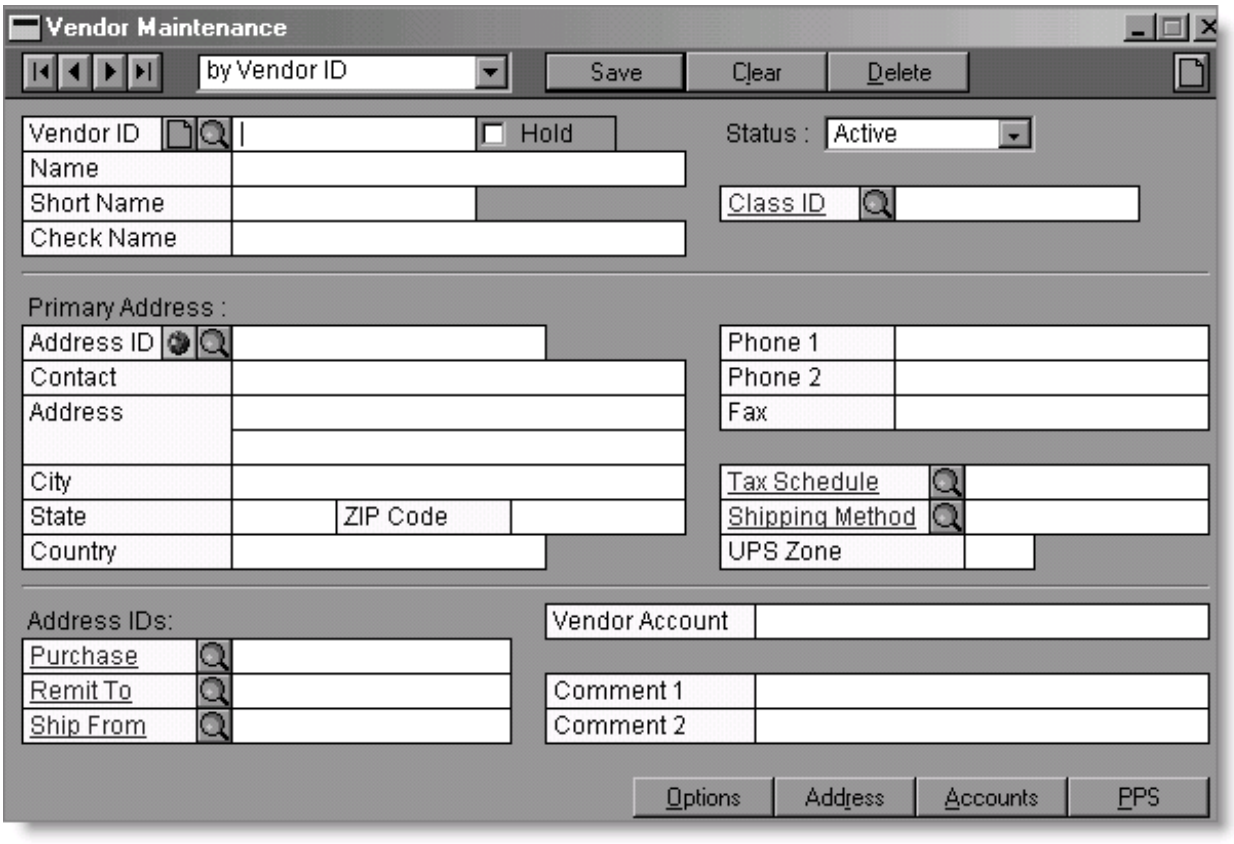


4. Locate and select the Batch ID corresponding to the integrated GLINT.TXT file. If the batch is still in a Busy Status, wait a few minutes for the Status to change to Available before viewing.

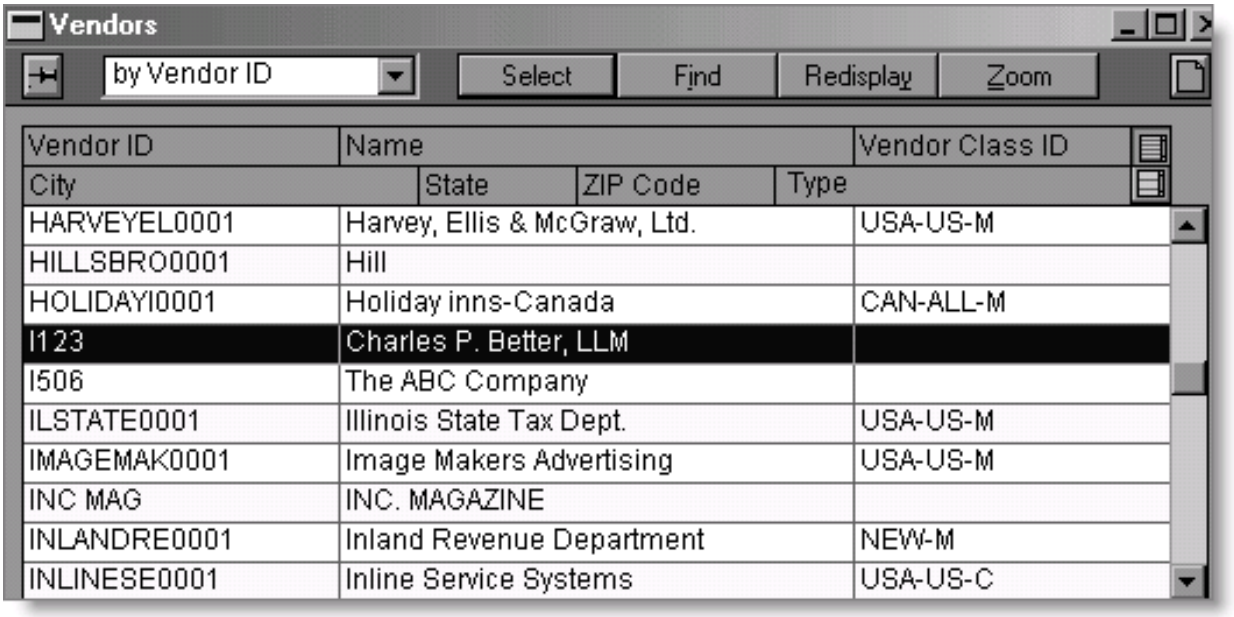
   To run an iMIS vendors integration

   This integration must be run before performing the iMIS Invoice Integration because it imports vendor data that is used later in the process. The integration steps for vendor integration are the same as in the iMIS GL transactions integration.

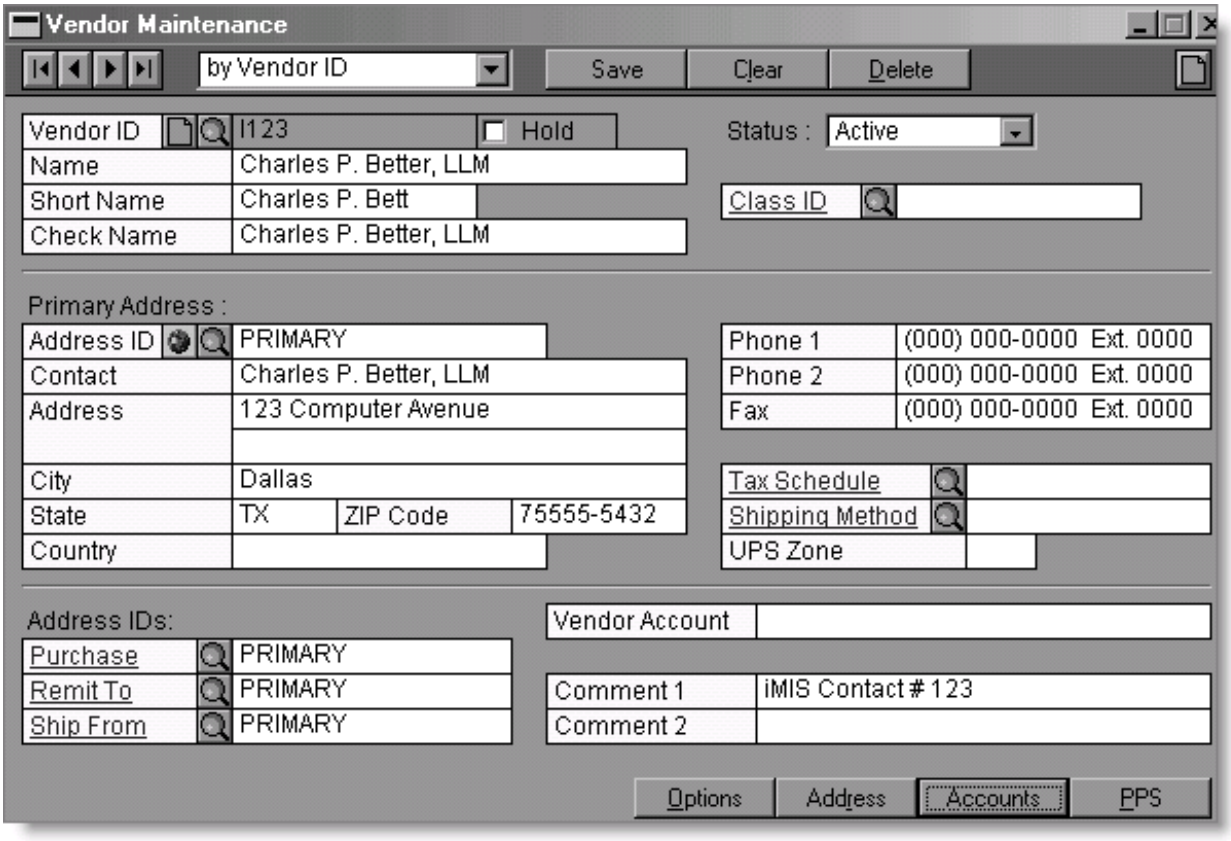
1. After successfully completing the iMIS Vendors Integration, in Dynamics, select Cards > Purchasing > Vendor. The Vendor Maintenance window opens.



2. Click the magnifying glass for Vendor ID and select the vendor(s) that corresponds to the one(s) you imported.



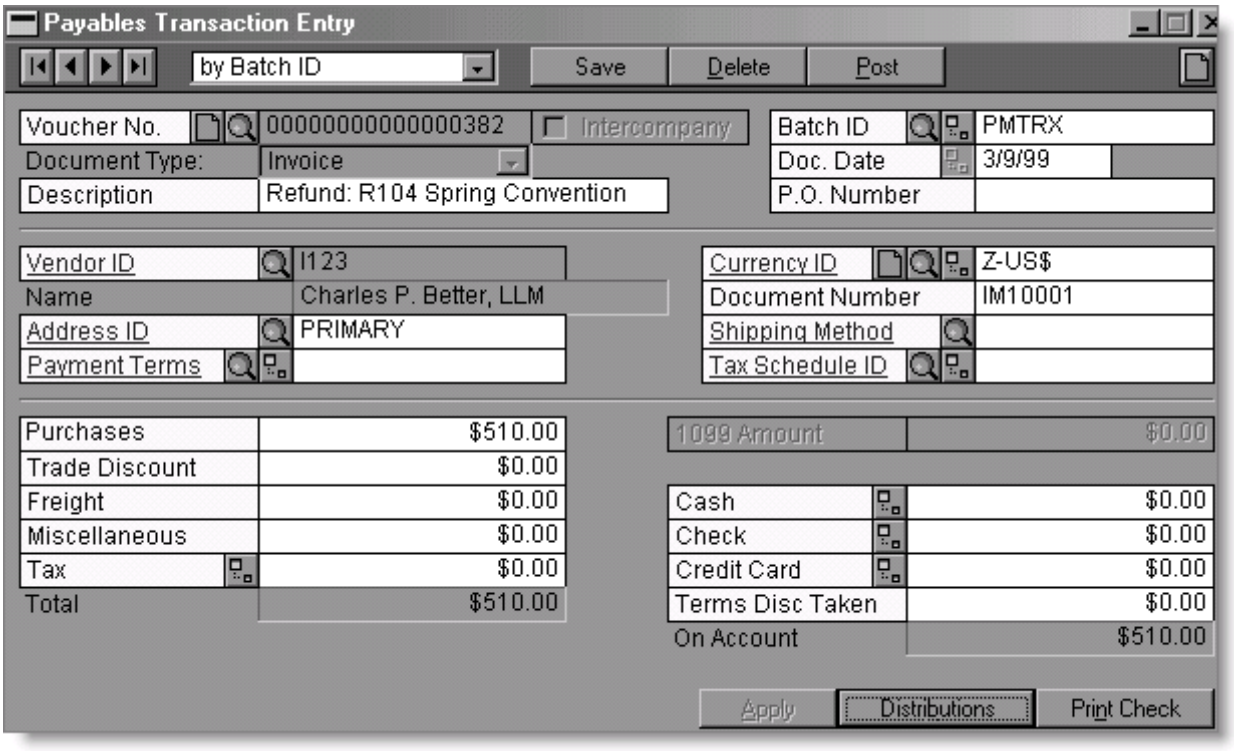
3. Review the Vendor data in the Vendor Maintenance window for accuracy.



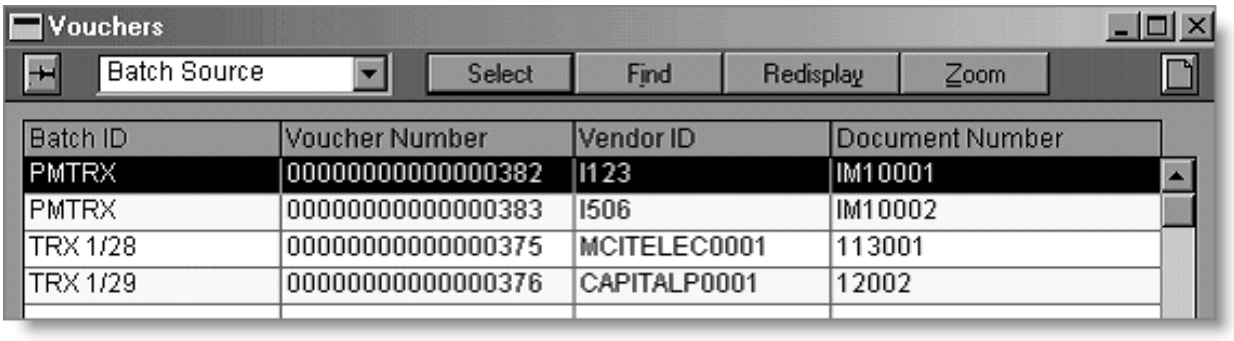
To run an iMIS invoice integration

You must run the iMIS vendor integration before iMIS invoice integration because the Vendor ID in the INVOICE.TXT file must cross-reference the Vendor ID in the VENDOR.TXT file. The integration steps for invoice integration are the same as in the iMIS GL transactions integration.

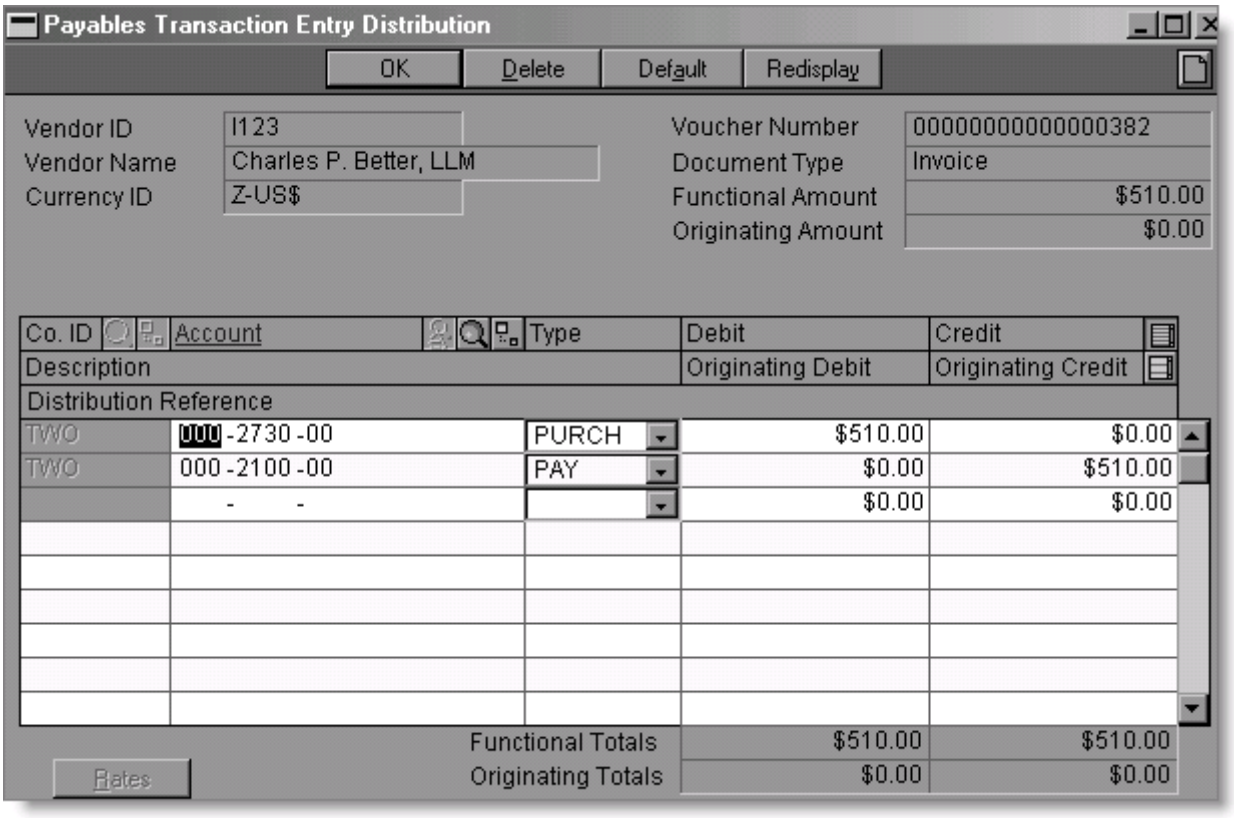
1. When the iMIS Invoice Transactions integration is complete, select Transactions > Purchasing > Transaction Entry. The Payables Transaction Entry window opens.



2. Click the magnifying glass for Voucher No. and select the voucher number that corresponds to the imported transaction.



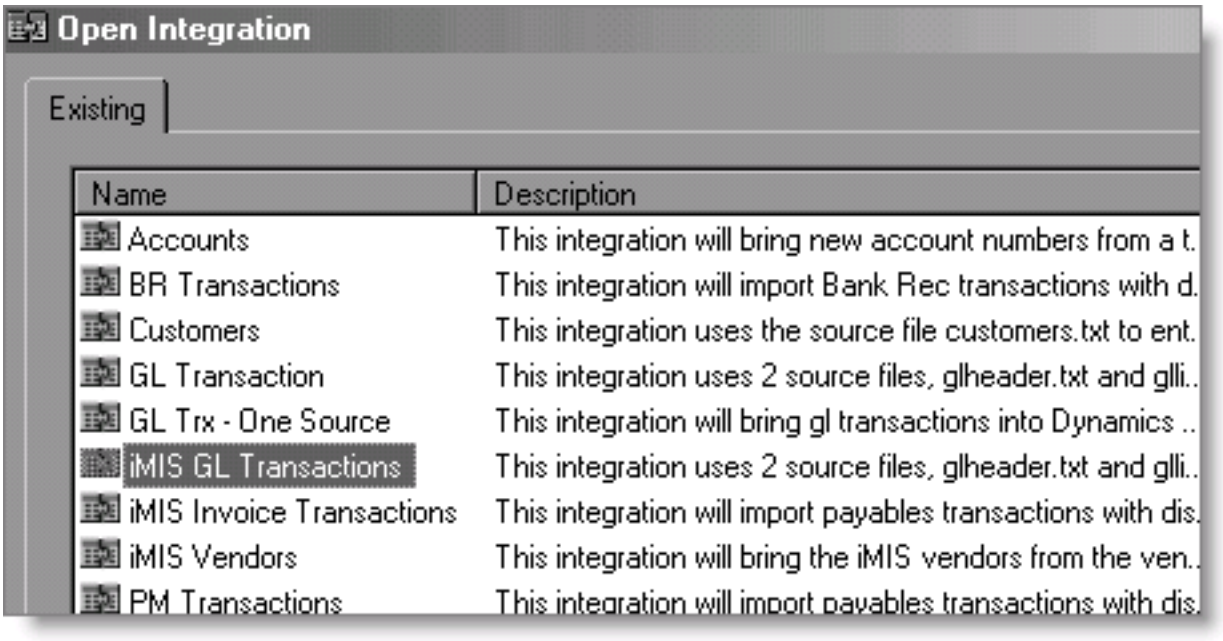
3. Click the Distributions button to display the Payables Transaction Entry Distribution window.



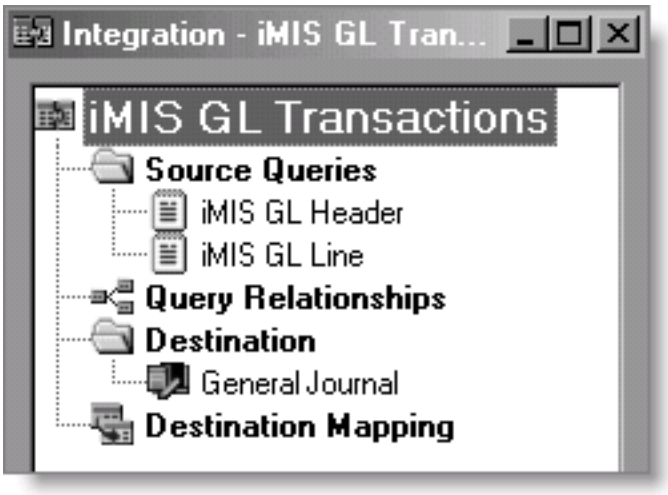
4. Confirm that the distributions are correct. Pay particular attention to the accounting entries and the Purchases account number.

To modify an iMIS integration

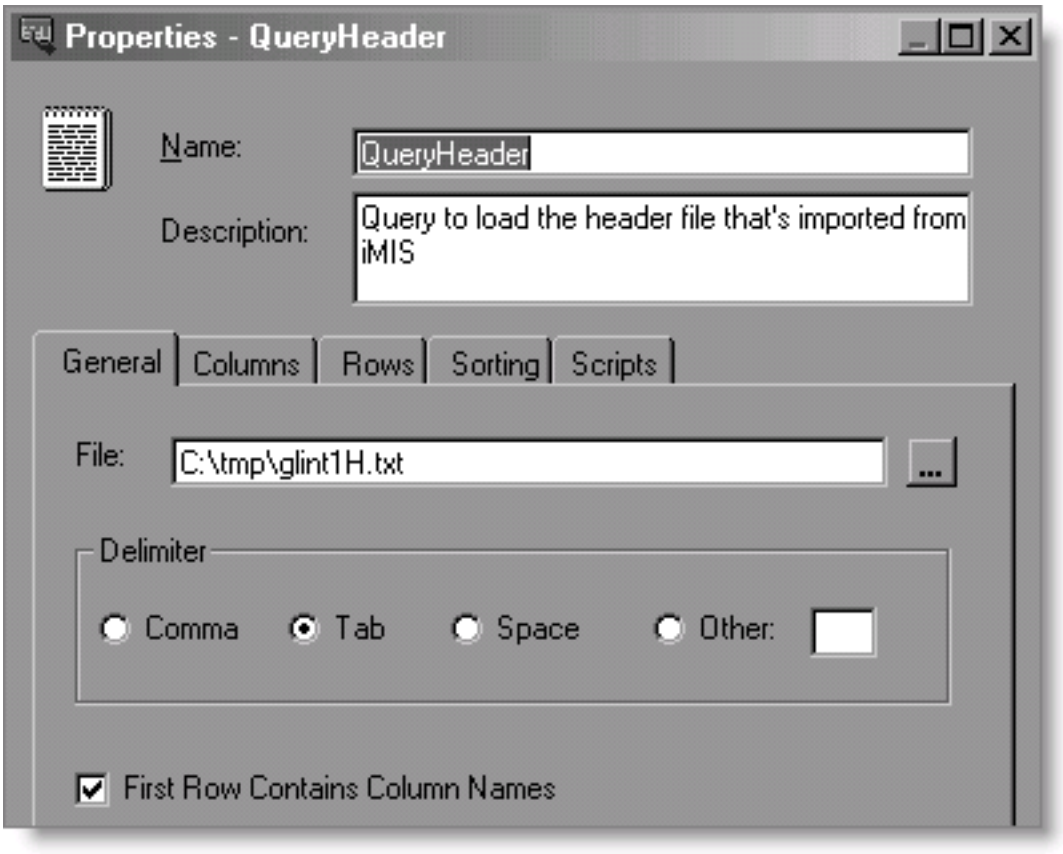
1. From Dynamics 5.0, launch the Integration Manager from Tools > Integrate > Integration Manager.
2. Click the Open button from the top row of buttons to display the available integrations.



3. Select the integration to modify (such as iMIS GL Transactions). The Integration – iMIS GL Transactions window opens.



4. Double-click the desired source query (such as iMIS GL Header). The Properties - QueryHeader window opens.



5. Modify the path and filename in the textbox under the General tab to correspond to your actual system. Note that the path/file name combination you specify here must match what you have set up for the Output file path/name under the GL Interface section in iMIS AR/Cash System Setup.
6. If you modify the path/file name combination for the iMIS vendors' integration or the iMIS invoice integration in the Dynamics Integration Manager, make the corresponding change to the Output file path/name under the AP Interface section in AR/Cash System Setup.

MAS 90 (Sage)

iMIS provides support to meet export requirements for MAS 90 version 3.21 or greater. This support is in place in iMIS LAN version 3.52 or greater and iMIS version 4.11 or greater.

To set up iMIS for MAS 90

This document provides some implementation setup steps for integrating iMIS with MAS 90. It also includes the instructions for importing the iMIS export/import files into MAS 90.

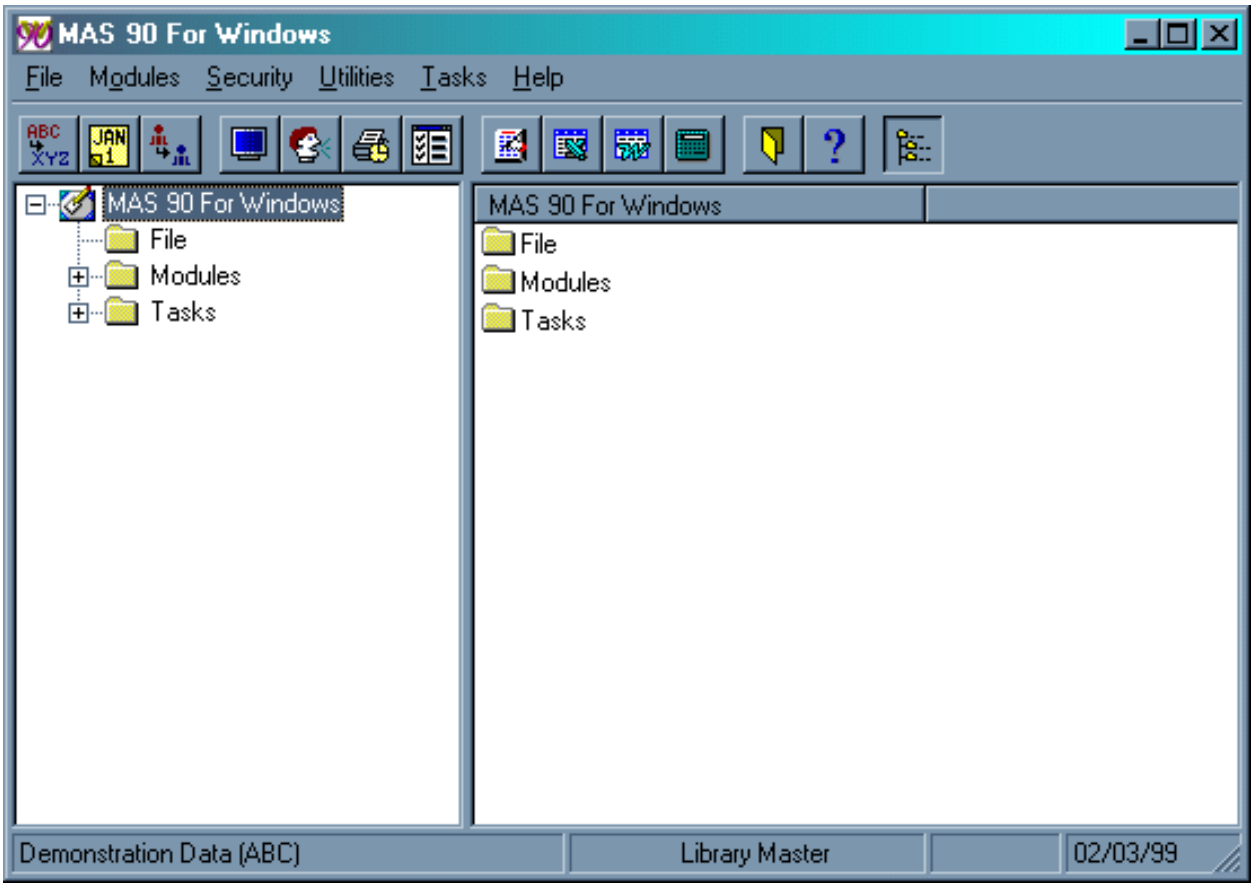
On the MAS 90 side, follow the steps outlined in MAS 90 Data Exchange Setup.

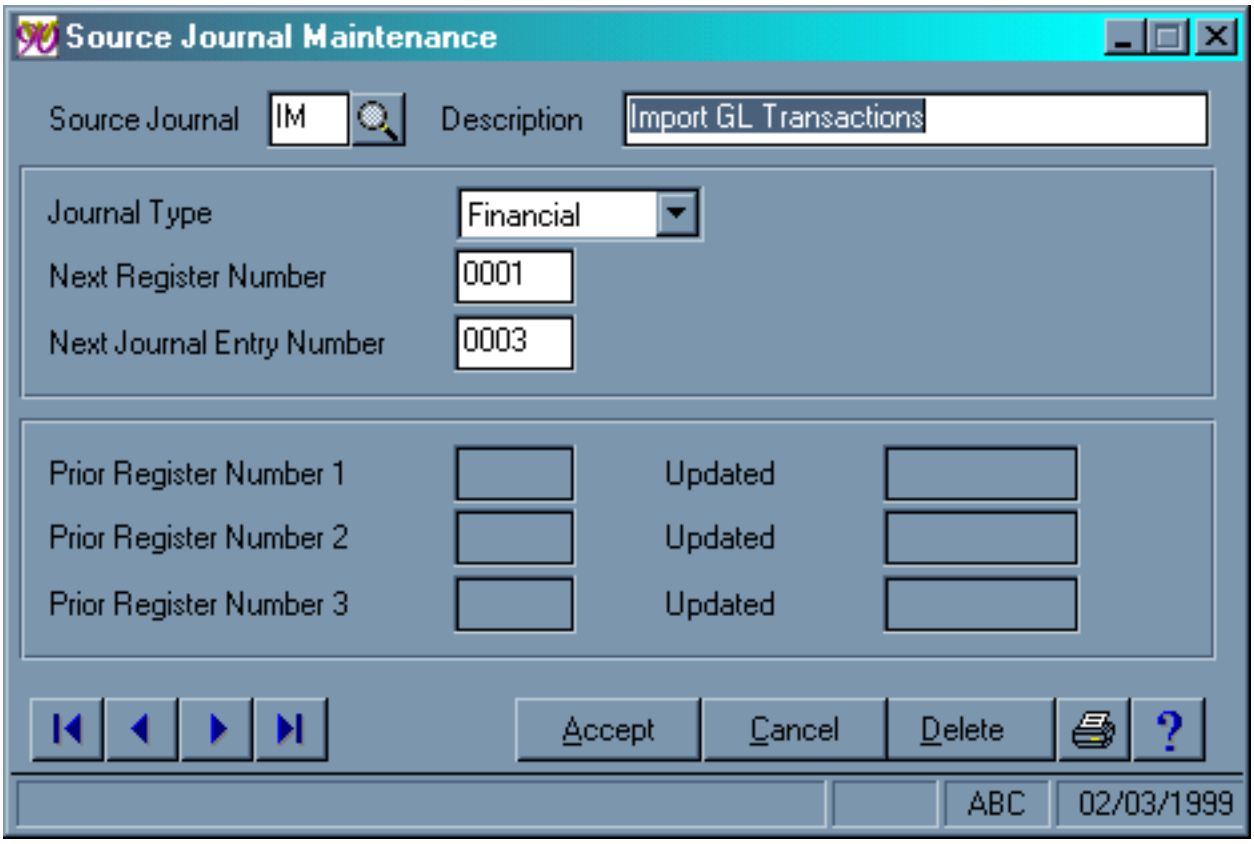
1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select MAS 90 Exchange. Note that the MAS 90 choice remains for those users who have not upgraded from older versions of MAS 90.
4. You may also need to modify the Output file path/name to dictate the naming and placement of the output file. The Output file path/name you enter in iMIS AR/Cash GL Interface should agree with the path and file name that you enter for your Import Transactions in the MAS 90 General Ledger module. MAS 90 requires a single detail transaction file only; iMIS correctly exports as the filename specified above.
5. Click Save.

To set up MAS 90

The following instructions were established with the assumption that MAS 90 version 3.21 has been fully installed/upgraded and is functioning properly. The General Ledger module must be installed before the following steps can be performed. Refer to your MAS 90 Installation Guide if you need assistance installing MAS 90.

Note: Be sure to enter your new or revised General Ledger module registration keys at the appropriate point during the MAS 90 install or upgrade. These keys make it possible for you to access the General Ledger module (which contains the Import Transactions feature) after it is properly installed.


MAS 90 For Windows
File Modules Security Utilities Tasks Help
MAS 90 For Windows
File
Modules
Tasks
MAS 90 For Windows
File
Modules
Tasks
Demonstration Data (ABC)
Library Master
02/03/99



Follow these steps to set up the MAS 90 Data Exchange to import a comma-delimited detail transaction line file into MAS 90.

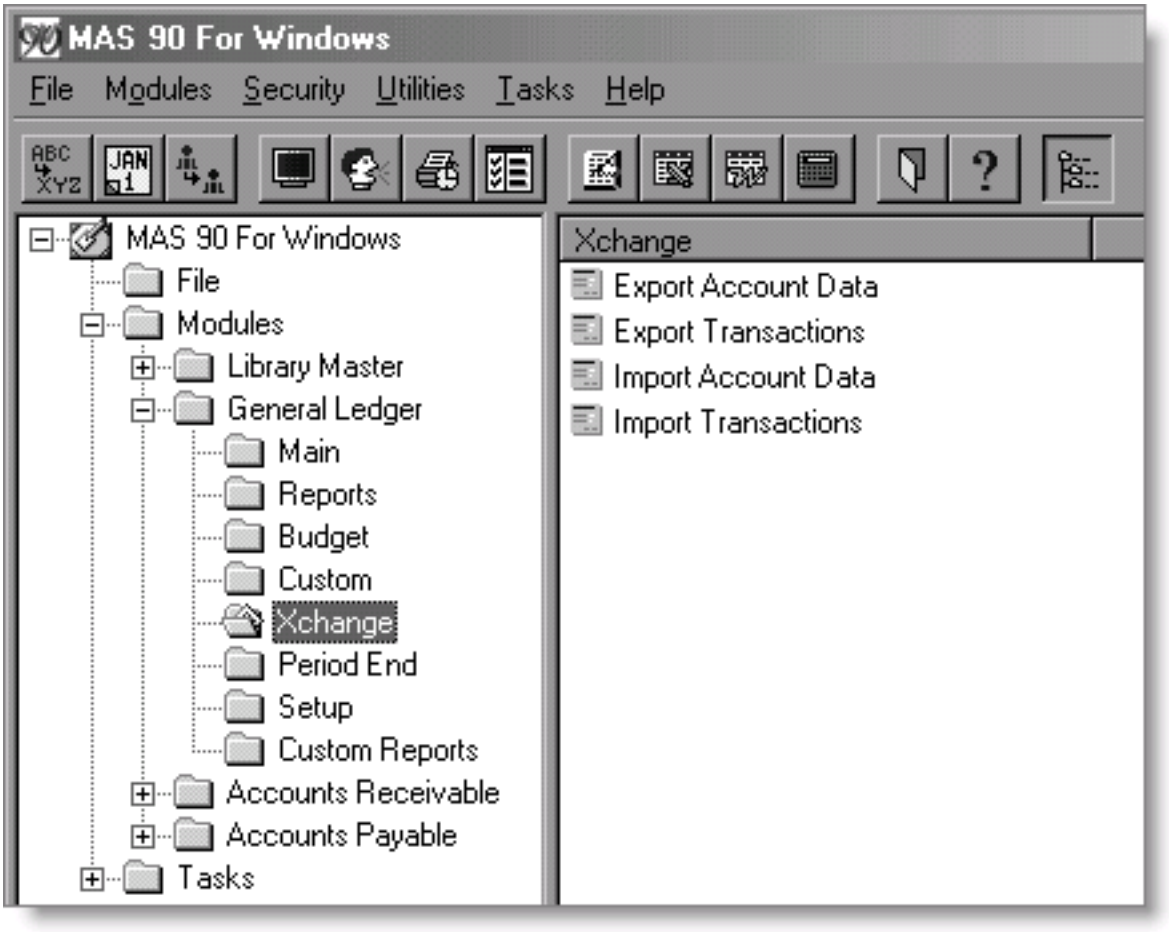
1. Launch MAS 90. The main window opens.
2. Create a Source Journal (or use an existing one) for importing transactions. In the pane on the left, select Modules > General Ledger > Setup. Double click Source Journal Maintenance in the pane on the right. The Source Journal Maintenance window opens.
3. Create a Source Journal with the following settings:

- Source Journal = IM
- Description = Import GL Transactions, or whatever is appropriate for your setup.
- Journal Type = Financial
- Next Register Number = Use the defaults or whatever is appropriate for your setup.
- Next Journal Entry Number = Use the defaults or whatever is appropriate for your setup.

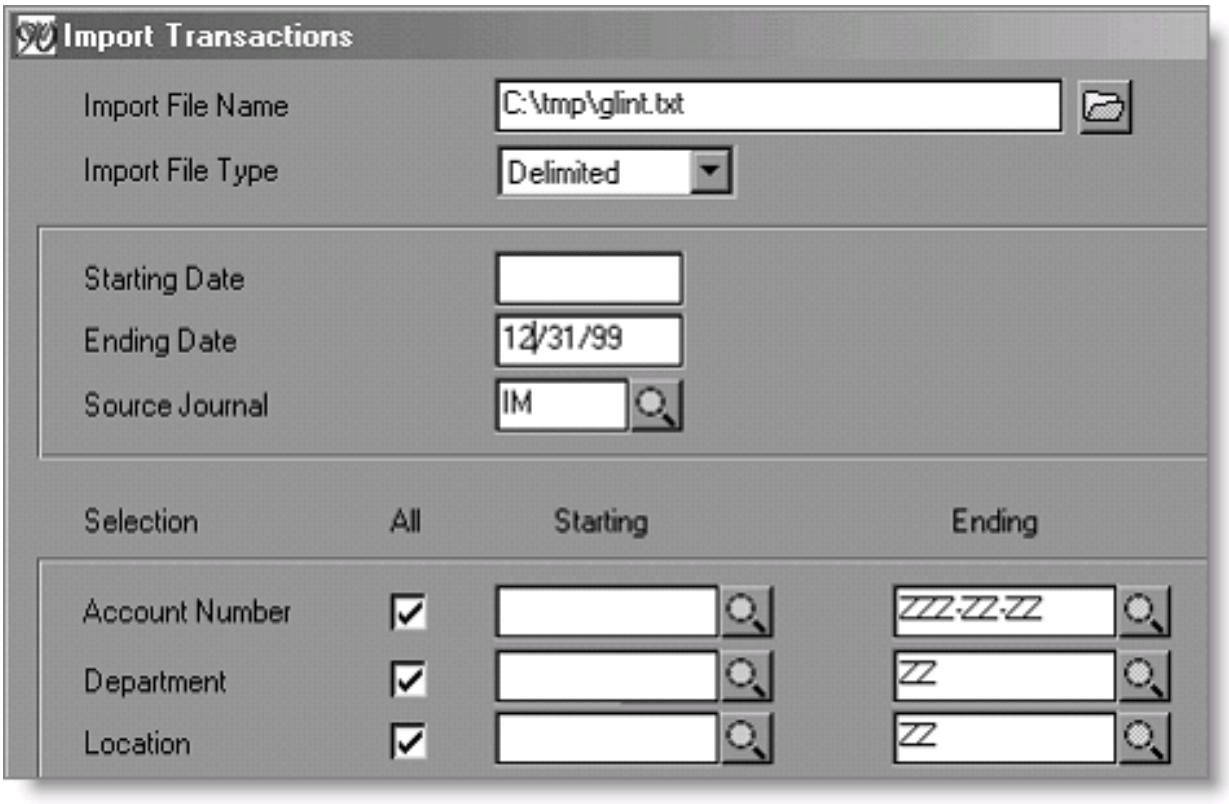
4. Click Accept.
5. Click X to close the Source Journal Maintenance window.

To import data into MAS 90

1. Open the Data Exchange area in the General Ledger module. In the pane on the left, select Module > General Ledger > Xchange.



2. Double-click on Import Transactions in the pane on the right to display the Import Transactions window.



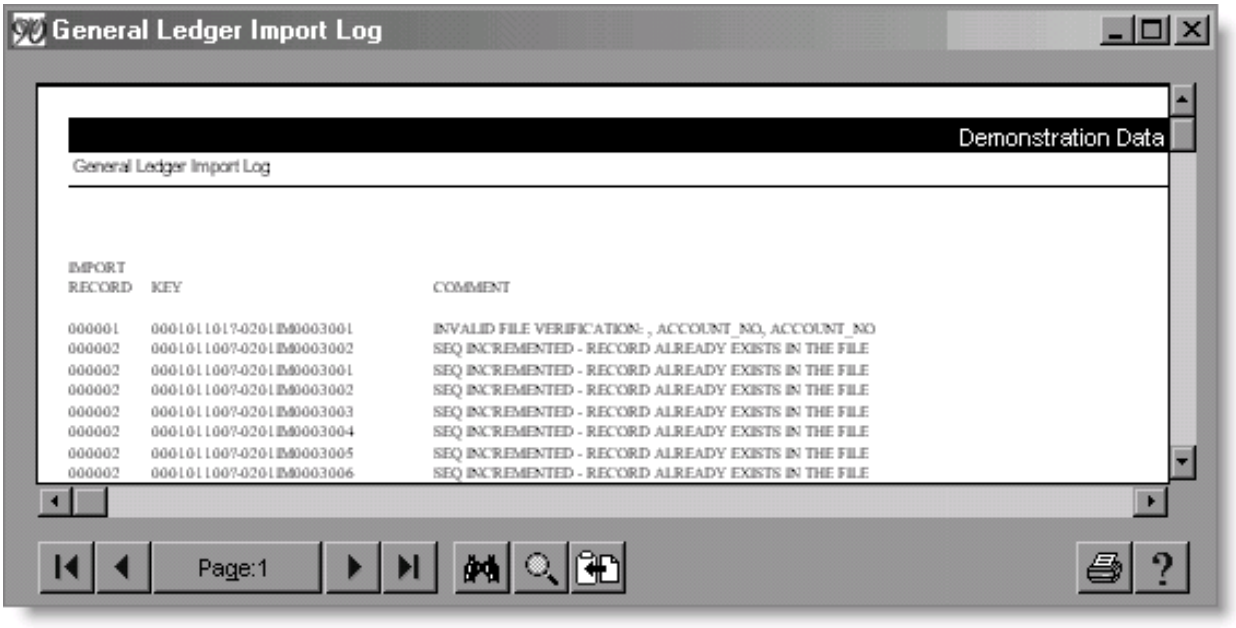
3. Enter the following settings:

- Import File Name = The default location where MAS 90 looks for import files is <root>:\MAS90\Home, but you can customize the Import File Name setting to a path and filename that is appropriate for your system. In this example, we use C:\TMP\GLINTDEMO.TXT to correspond to the setting for Output file path/name in iMIS AR/Cash GL Interface.
- Import File Type = Delimited
- Starting Date = N/A
- Ending Date = N/A
- Source Journal = IM

  Note: You must have already created a Source Journal listing of IM before you enter this setting for your import operation. See MAS 90 Data Exchange setup.

4. Click Proceed.
5. When a message box reporting the number of records imported prompts you to print the import log, click Yes. The GL Import Log window opens.

6. Click Preview and view the results to determine the possible cause for transactions that were not imported successfully.



7. Review the results as necessary and print the output as necessary with the printer icon button in the lower right portion of the window.
8. Click X to close the window.

MIP NonProfit Series

iMIS provides support to meet export requirements for MIP NonProfit Series for Windows version 3.0 or greater. This support is in place in iMIS as of version 4.10.

In order to facilitate the interface, iMIS formats the transaction data into a fixed-file format. The export/import file is then imported into a journal batch with a simple import process that works hand-in-hand with an iMIS-specific import definition file.

To set up iMIS for MIP

The setup steps from iMIS include making appropriate choices on the AR/Cash General Ledger Interface window and an optional step to establish a MIP general/lookup validation table.

The iMIS setup steps are described in detail below:

Step 1 – Change the GL Interface Type

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select MIP.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored. To avoid changing the file name with each new import, do not include the ? substitute character.
6. Click Save.

Step 2 – Set up a special MIP General Lookup/Validation Table

1. From Customers, select Set up tables > General lookup/validation to open the General lookup/validation window.
2. Select (New Table) from the list of table types. The New Table Type window opens.
3. Enter a New Table named MIP and click Save.

4. Click New.
5. Type SEGMENTS in all caps in the Code field.
6. In the Expansion field, fill in the number of segments in your GL Chart of Account structure.
7. Click Save.

To copy the IMIS_GL.def definition file

1. Copy the IMIS_GL.def file to the mipnps32\data directory. You can copy the definition file from either the iMIS_Ent\Files\GL_Int or the iMIS_Mil\Files\GL_Int directories on the CD.

To modify the export/import file path and name

1. Edit the copied IMIS_GL.def file with a text editor such as Notepad.
2. Change the path and file name on in the FILE,SESSION section to coincide with the location and naming convention you entered during the iMIS setup.

```
REM,-------------------------------------------------------------------
REM,                 SAMPLE IMIS JOURNAL VOUCHER IMPORT DEF FILE
REM,-------------------------------------------------------------------
REM, The following lines define where the text file is located that hol
REM, data to be imported. You should modify this path and filenames as
REM, appropriate.
REM,-------------------------------------------------------------------
FILE,SESSION            ,c:\program files\mipnps32\data\glint.txt
REM,-------------------------------------------------------------------
CONTEXTIDPOSITION,1,6
REM,-------------------------------------------------------------------
REM,                      Session Information Import
REM,-------------------------------------------------------------------
REM,                            Session Header Information
REM,-------------------------------------------------------------------
CONTEXT,SESSION,HEADER,HSESSN
SESSION_SESSIONNUMID,8,7
SESSION_TRANSSOURCEID,56,2
SESSION_SESSIONDATE,45,8
SESSION_DESCRIPTION,19,25
```

The path on the supplied definition is c:\program files\mipnps32\data\glint.txt

Note: If you are in a multi-entity situation in which you need to generate multiple output files (that is, you have a # entity substitution character within the output file), you must create a separate definition file for each entity. For example, if you had two entities, DEMO and FND, and the export/import file setup as GL#.TXT, copy the single IMIS_GL.DEF to 2 files, such as IMIS_GL_DEMO.DEF and IMIS_GL_FND.DEF. In IMIS_GL_DEMO.DEF, change the file name to GLDEMO.TXT. Likewise, the file name in IMIS_GL_FND.DEF should be changed to GLFND.TXT.

You do not need to create separate files if you have a single legal entity but multiple funds. iMIS treats funds as separate entities, but they are only handled in separate sets of books, not separate files, within MIP.

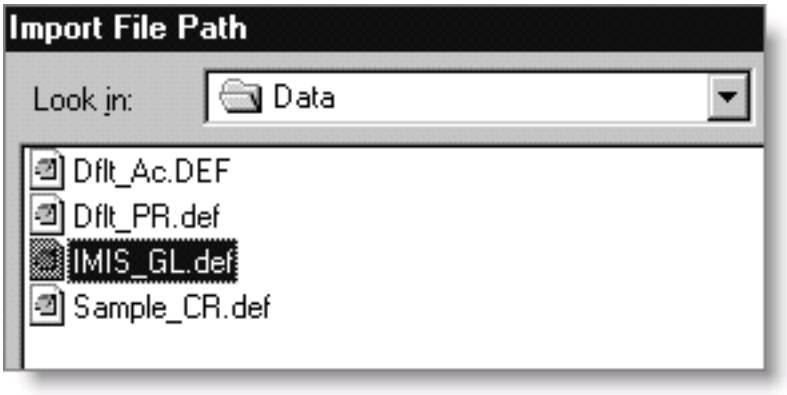
Caution! Do not make any other modifications to the definition file. This file contains important instructions to help MIP read and process the iMIS import.

To create the export file from iMIS (MIP)

1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

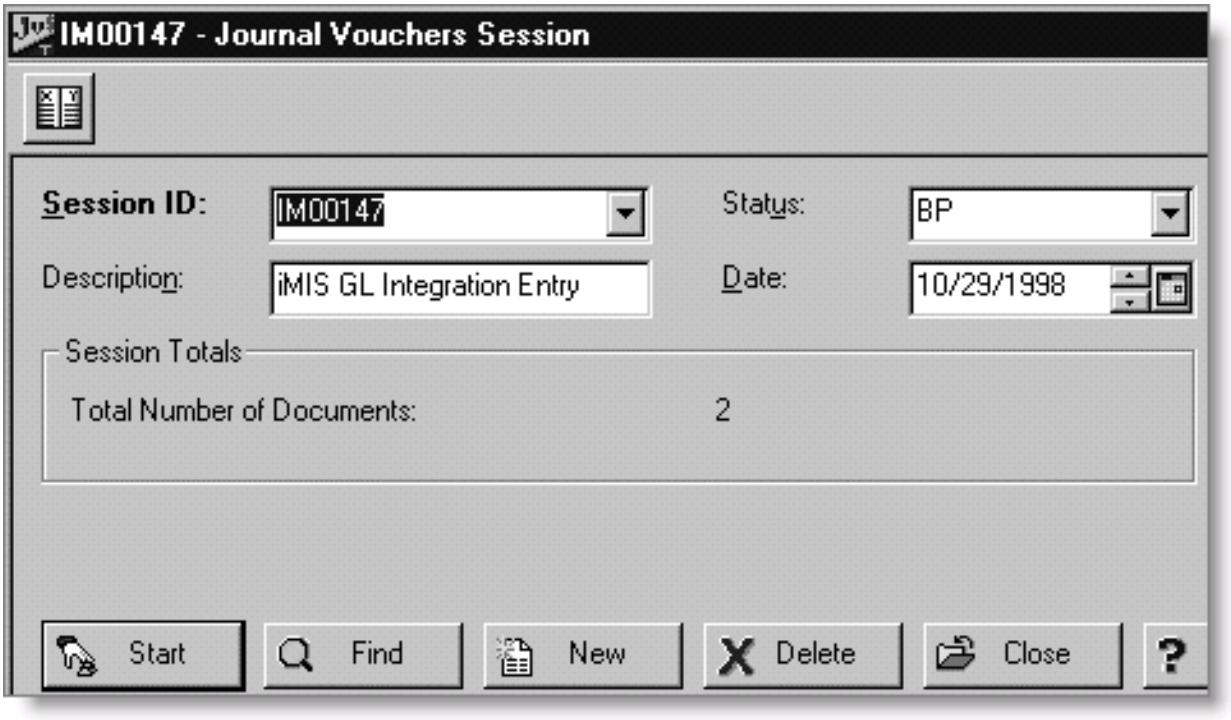
To import data into MIP

1. Select File > Import.
2. In the Import File Path window, locate and double-click the IMIS_GL.def definition file.

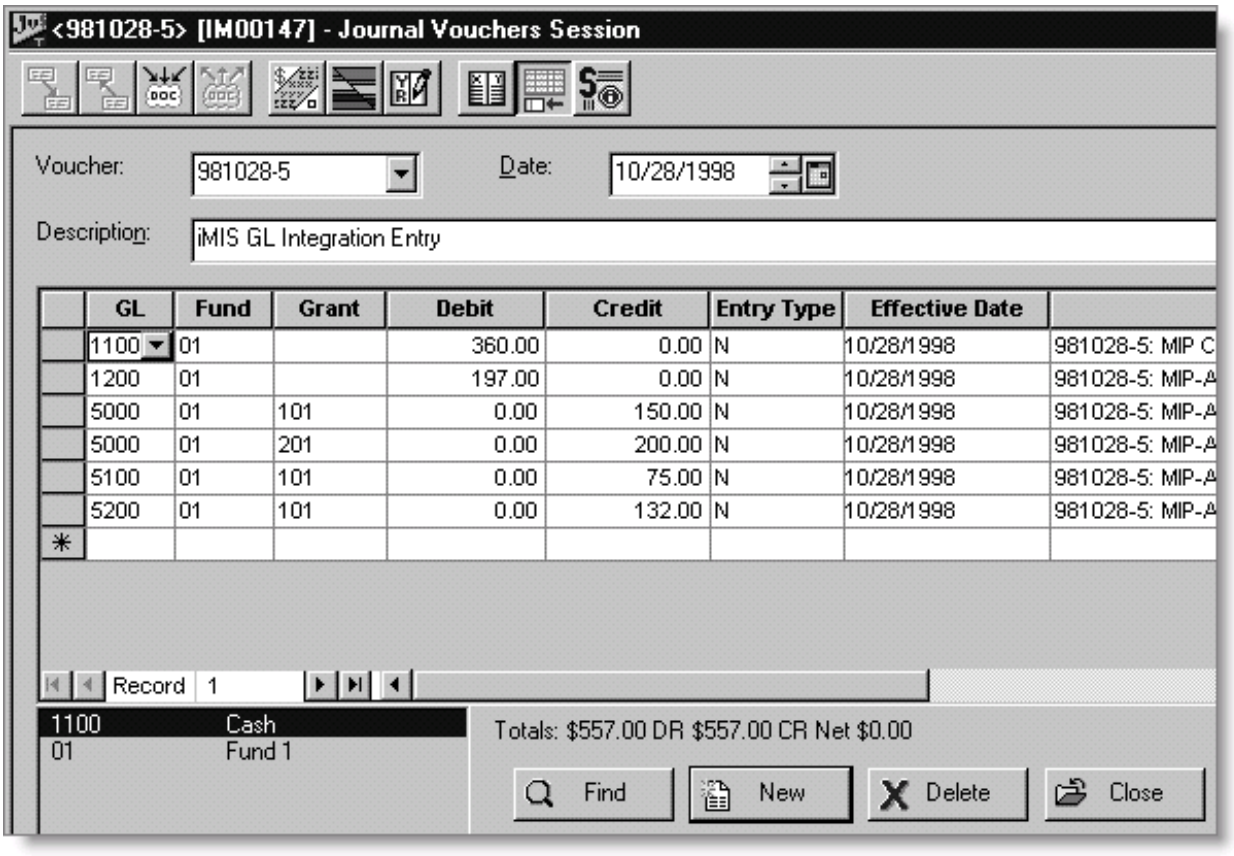


Note: In a multiple-entity, multi-file situation, select the appropriate copied and renamed definition file for the entity with which you are working.

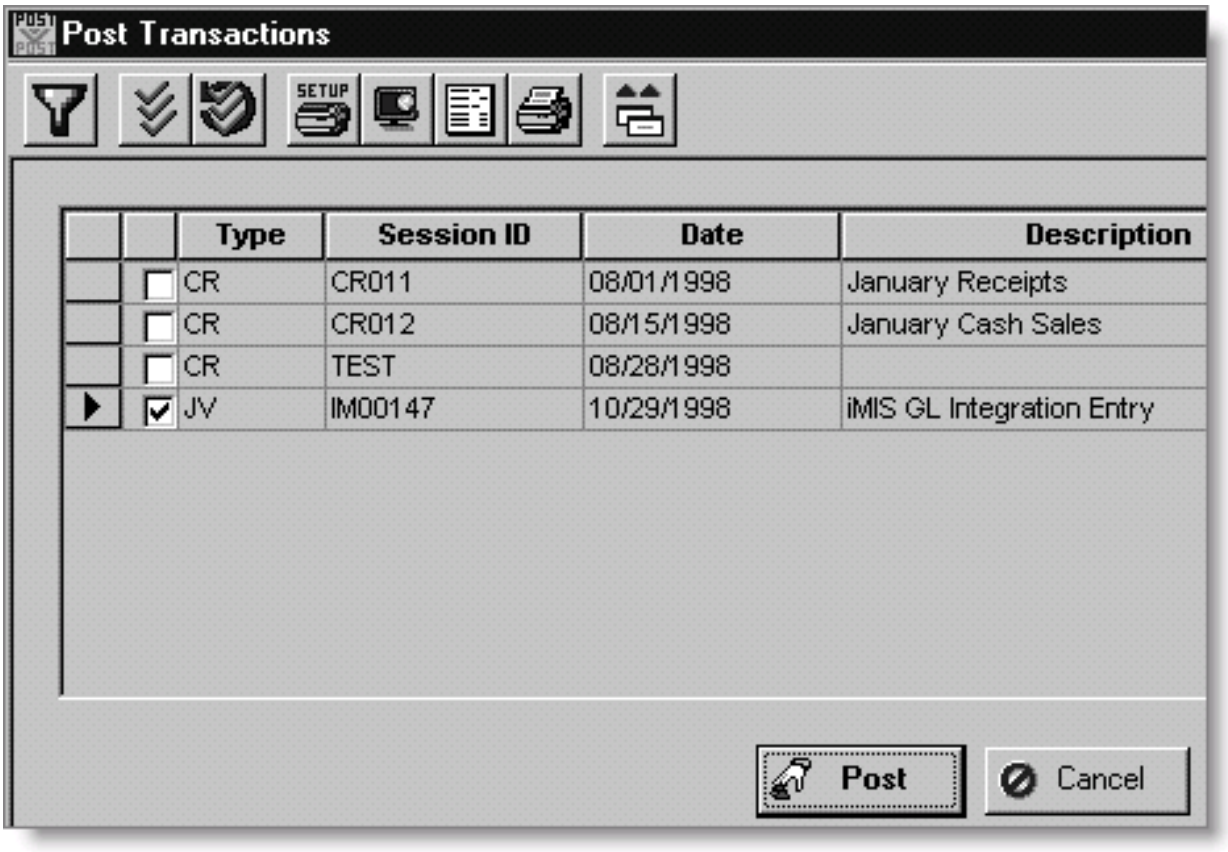
3. The data is used to create unposted general journal voucher transactions.
4. Once imported, the data can be viewed through Transactions > Enter Journal Vouchers.



5. Note that all iMIS generated Session IDs begin with “IM” so they are easy to locate.
6. To view the individual transactions imported, click the Start button and use the Voucher drop-down list to find the transaction to view.

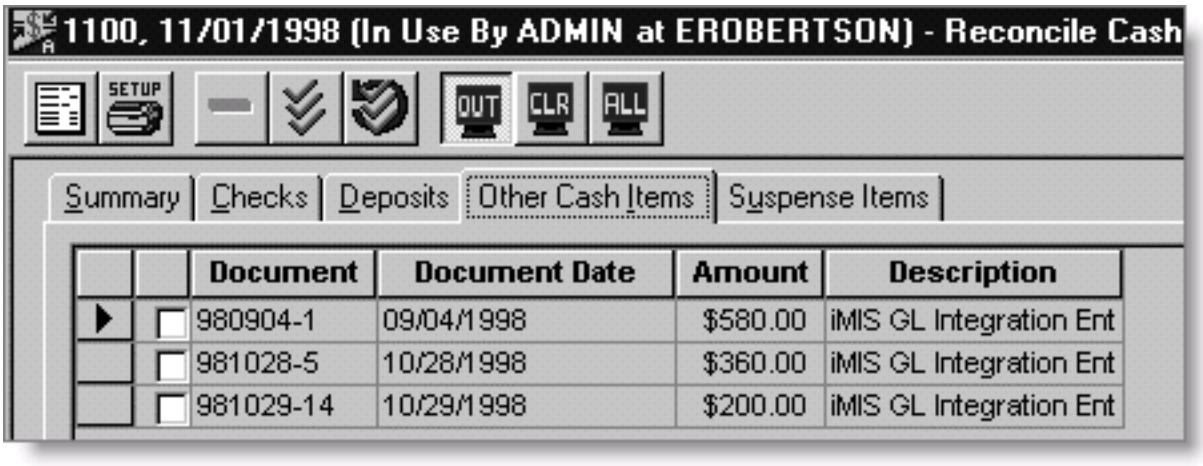


7. To post the transactions, select Activities > Manage Sessions > Post Transactions.



8. Enable the checkbox next to the iMIS GL Integration Entry session and click the Post button to post the imported entries.

   Note: iMIS-imported entries to a cash account appear under the Other Cash Items tab on the Reconcile Cash Accounts window.



Export/Import File Example

The export/import file is a simple fixed-length export/import file that contains a single heading line for the MIP session, a document header line for each new transaction created, and detail document lines for each debit or credit entry in the document or transaction.

iMIS generates a new journal entry and Document Number each time the following is encountered:

- A new transaction date (for Day or Detail summary methods).
- A new batch (for Batch summary methods).

The following export/import example shows a small interface file for two batches across two dates.

HSESSN IM00147 BP iMIS GL Integration Entry 04282011 JV

HDOC IM00147 JV 110428-5 04282011 iMIS GL Integration Entry iMIS 3

DDOC IM00147 110428-5CR 981028-5: MIP Cash Receipt CR N 04282011 00001 00000036000 00000000000 1100-01

DDOC IM00147 110428-5 110428-5: MIP-AR-AR CR N 042820118 00002 00000019700 00000000000 1200-01

DDOC IM00147 110428-5 110428-5: MIP-AR-MIP1 CR N 04282011 00003 00000000000 00000015000 5000-01-101

DDOC IM00147 110428-5 110428-5: MIP-AR-MIP4 CR N 04282011 00004 00000000000 00000020000 5000-01-201

DDOC IM00147 110428-5 110428-5: MIP-AR-MIP2 CR N 04282011 00005 00000000000 00000007500 5100-01-101

DDOC IM00147 110428-5 110428-5: MIP-AR-MIP3 CR N 04282011 00006 00000000000 00000013200 5200-01-101

HDOC IM00147 JV 110429-14 04292011 iMIS GL Integration Entry iMIS 3

DDOC IM00147 110429-14CR 110429-14: MIP Cash Receipt CR N 04292011 00001 00000020000 00000000000 1100-01

DDOC IM00147 110429-14 110429-14: MIP-AR-AR CR N 04292011 00002 00000015000 00000000000 1200-01

DDOC IM00147 110429-14 110429-14: MIP-AR-MIP1 CR N 04292011 00003 00000000000 00000010000 5000-01-101

DDOC IM00147 110429-14 110429-14: MIP-AR-MIP4 CR N 04292011 00004 00000000000 00000010000 5000-01-201

DDOC IM00147 110429-14 110429-14: MIP-AR-MIP2 CR N 04292011 00005 00000000000 00000015000 5100-01-101

Peachtree for Windows

iMIS provides support to meet export requirements for Peachtree for Windows version 6 and greater. This support is in place in iMIS as of version 4.11.13.04.

To set up iMIS for Peachtree

The setup steps from iMIS include making appropriate choices on the AR/Cash General Ledger Interface.

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select a version of Peachtree. The version you select depends upon which version of Peachtree Windows you are using.

- Select Peachtree V6 from the drop-down list if your version is 6 or greater.
- Otherwise, select the Peachtree V3_B5 option.

4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.

- Use a # sign in the file name to instruct iMIS to create files for each iMIS organization code, with the ORG code inserted in the file name.
- Use a ? mark in the file name to instruct iMIS to create sequentially numbered files with each subsequent file that is generated.

  For example, #glint?.csv will create ORG1glint1.csv and ORG2glint1.csv for the first export and ORG1glint2.csv and ORG2glint2.csv for the next export.

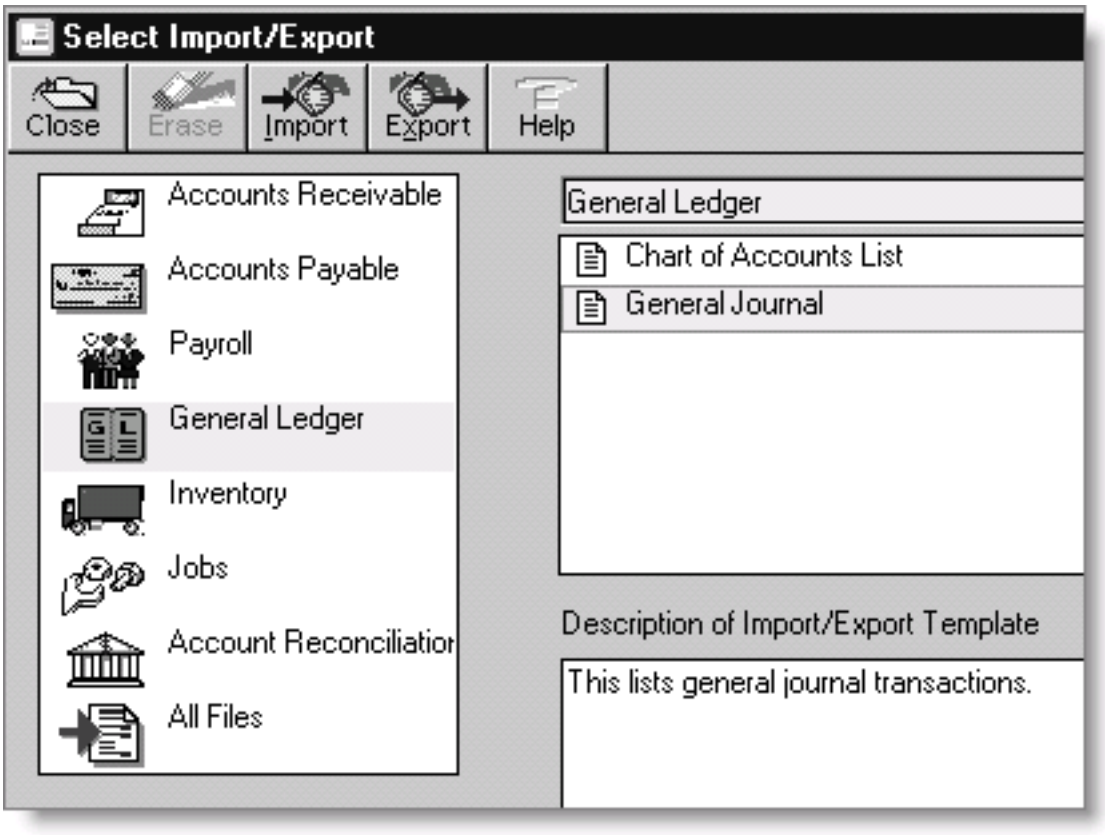
  Hint: The default extension for Peachtree import files is .CSV (Comma Separated Values). Peachtree uses the default directory bcs subfolder under the peachw folder when looking for import files. Although you can name and position Peachtree import files anything or anywhere you wish, you may wish to keep these defaults in mind when considering the name and location of the export file.

6. Click Save.

   To set up Peachtree Windows

   The setup within Peachtree Windows includes a simple step to fine-tune the General Journal Import definition.

1. Select File > Select Import/Export. The Select Import/Export window opens.

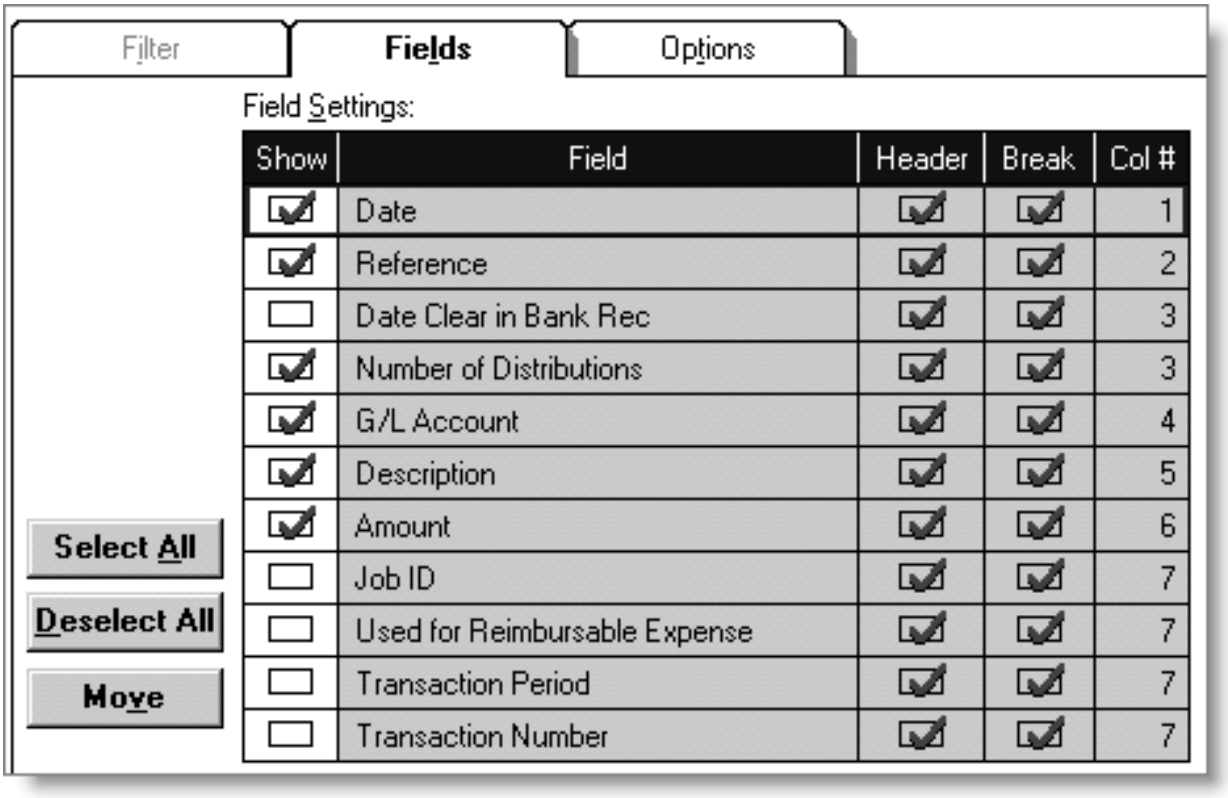


2. From the Select Import/Export window, highlight General Ledger on the left and General Journal on the right
3. Click the Import button. The General Journal window opens.
4. From the General Journal window Fields tab, uncheck the Show box for the following fields:

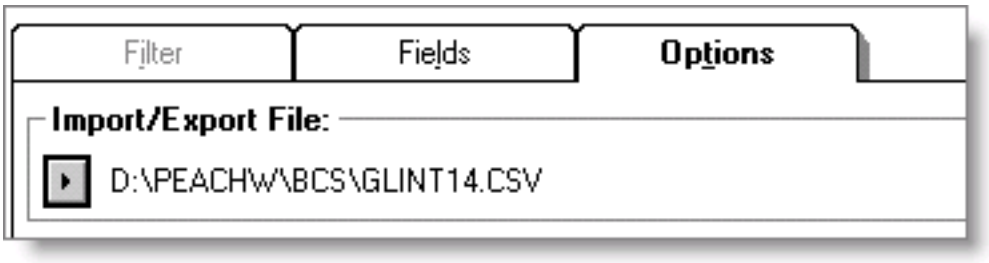
- Date Clear in Bank Rec
- Job ID
- Used for Reimbursable Expense
- Transaction Period
- Transaction Number

5. When you finish, six fields remain checked to match the iMIS Peachtree export output:

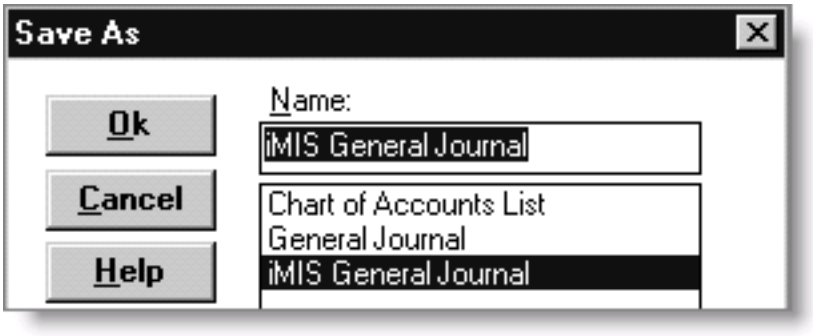
- Date
- Reference
- Number of Distributions
- G/L Account
- Description
- Amount



6. Click the Options tab.
7. Click the right arrow icon under the Import/Export File prompt and browse to the correct export/import directory and file name.



8. Click the Save button on the window.
9. Assign a new name (for example, iMIS General Journal) to the revised Import Definition in the Save As window.
10. Click OK.



If you wish to process the import, click the OK button on the Import definition window, or click the Cancel button to exit.

To create the export file from iMIS (Peachtree)

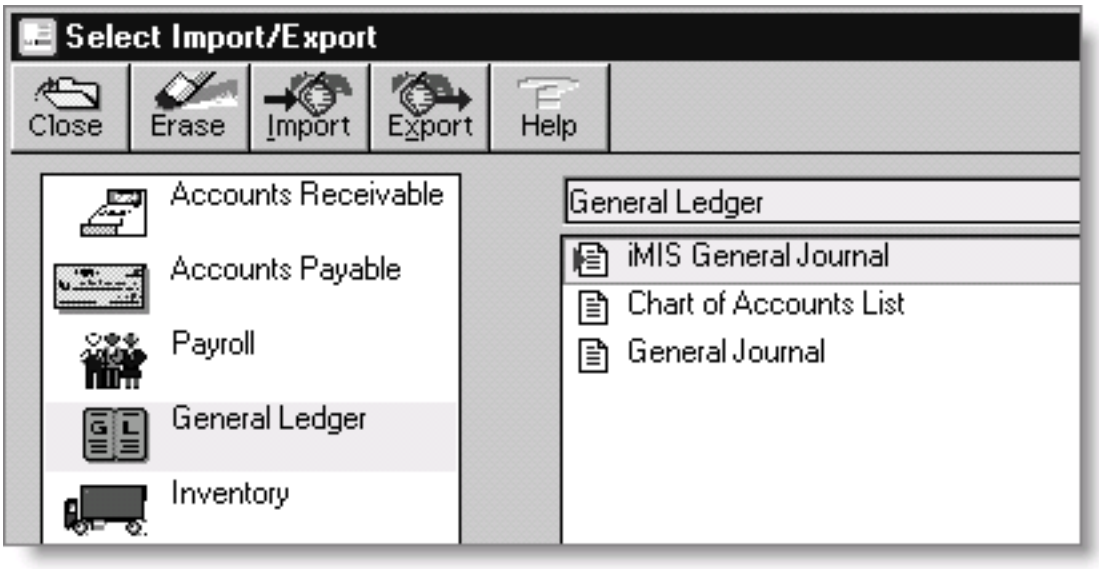
1. Select AR/Cash > Process month-end procedures > Create GL Journal to generate the general ledger transaction export files.

To import data into Peachtree Windows

Make sure you have a current backup before you begin the import process.

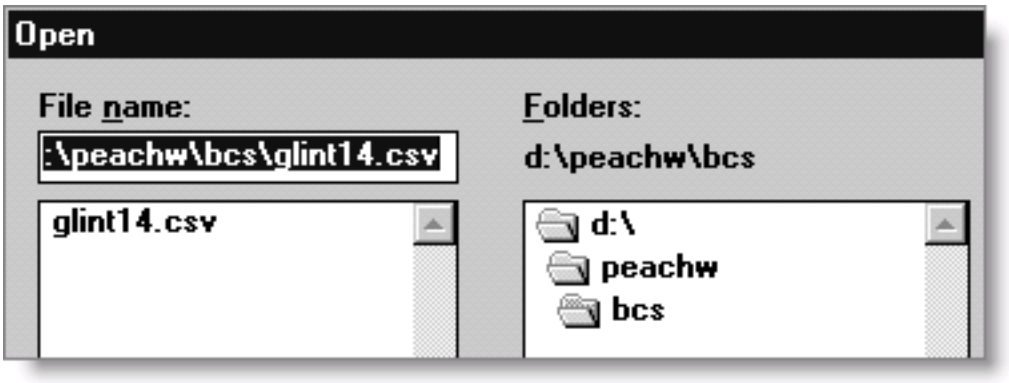
1. Select File > Select Import/Export to open the Select Import/Export window.

2. Select General Ledger on the left.
3. Select iMIS General Journal, or the name assigned in step Assign a new name (for example, iMIS General Journal) to the revised Import Definition in the Save As window. above.
4. Click Import.

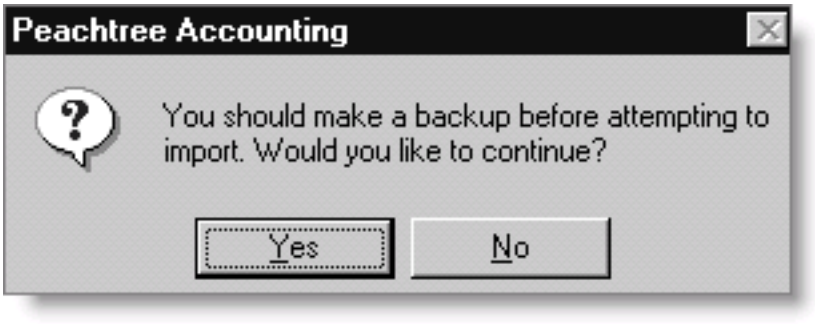


5. Click the Options tab and verify that the Path and file names are correct for the export file created by iMIS.

   Note: If your file name varies with each import, or if you have multiple files to import, click the right arrow icon under the Import/Export File prompt and select the correct export/import and file name.



6. Click OK from the Import window to proceed with importing the iMIS general journal entry. The following verification message displays.

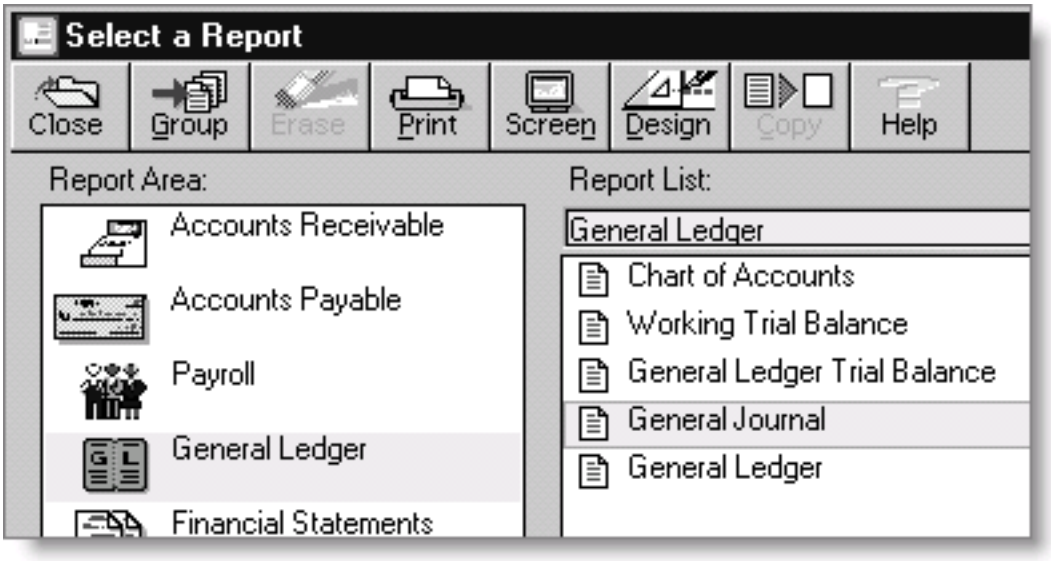


Make sure you have a current backup.

7. Click Yes to proceed with the import.

To view transactions imported from Peachtree

1. Select Reports > General Ledger. The Select a Report window opens.



2. You may need to click the Design icon and override the date range for the report.

Date	Account ID	Reference	Trans Description	Debit Amt	Credit Amt
3/12/00	10100	000312-1	000312-1: PEACH Cash Receipt	650.00	
	11000		000312-1: PEACH-AR-AR	60.00	
	11000		000312-1: PEACH-MEETING-AR	150.00	
	40000		000312-1: PEACH-AR-PEACH1		100.00
	40000-C		000312-1: PEACH-AR-PEACH2		60.00
	40000-R		000312-1: PEACH-MEETING-PEACH/M		700.00
3/12/00	10100	000312-2	000312-2: PEACH Cash Receipt	100.00	
	40000		000312-2: PEACH-AR-PEACH1		100.00
3/13/00	10100	000313-1	000313-1: PEACH Cash Receipt	210.00	
	11000		000313-1: PEACH-AR-AR		210.00
		Total		**1,170.00**	**1,170.00**

Export/Import File Example

The GL Interface process creates a single comma-delimited file containing the transactions selected for export in iMIS. The transactions are summarized based on the option selected in AR/Cash System Setup.

04/12/2011,"110412-1",6,"10100","110412-1: PEACH Cash Receipt",650.00

04/12/2011,"110412-1",6,"11000","110412-1: PEACH-AR-AR",60.00

04/12/2011,"110412-1",6,"11000","110412-1: PEACH-MEETING-AR",150.00

04/12/2011,"110412-1",6,"40000","110412-1: PEACH-AR-PEACH1",-100.00

04/12/2011,"110412-1",6,"40000-C","110412-1: PEACH-AR-PEACH2",-60.00

04/12/2011,"110412-1",6,"40000-R","110412-1: PEACH-MEETING-PEACH/MAIN",-700.00

04/12/2011,"110412-2",2,"10100","110412-2: PEACH Cash Receipt",100.00

04/12/2011,"110412-2",2,"40000","110412-2: PEACH-AR-PEACH1",-100.00

04/13/2011,"110413-1",2,"10100","110413-1: PEACH Cash Receipt",210.00

04/13/2011," 110413-1",2,"11000","110413-1: PEACH-AR-AR",-210.00

Quickbooks Pro

iMIS provides support to meet export requirements for Quickbooks Pro version 5.0 or greater. This support is in place in iMIS LAN version 3.50d or greater and iMIS as of version 4.10.

In Quickbooks Pro, all receivable and payable accounts must be cross-referenced to a customer or vendor account, respectively. For this purpose, you must set up a special iMIS customer in Quickbooks Pro to which the accounts receivable entries are linked. If you have to charge sales tax through iMIS processing, you must map the appropriate Vendor code to the tax liability account in iMIS. These required setup steps are outlined below.

To set up iMIS for Quickbooks Pro

The setup steps from iMIS include making appropriate choices on the AR/Cash General Ledger Interface window and an optional step to establish a Quickbooks Pro general/lookup validation table.

The iMIS setup steps are described in detail below:

Step 1 – Change the GL Interface Type

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Quickbooks Pro.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored. Although you can be flexible in what name and directory you assign to the export file, Quickbooks Pro will, by default, look in the qbooksw directory for import files with an .IIF extension. If you follow these defaults, there will be fewer steps required to importing.

   For best results, set the extension of the file name to .iif (i.e., I:\IMIS\GLINT.iif).

- Use a # sign in the file name to instruct iMIS to create files for each iMIS organization code, with the ORG code inserted in the file name.
- Use a ? mark in the file name to instruct iMIS to create sequentially numbered files with each subsequent file that is generated.

  For example, #glint?.iif will create ORG1glint1.iif and ORG2glint1.iif for the first export and ORG1glint2.iif and ORG2glint2.iif for the next export.

6. Click Save.

   Step 2 – Set up a special QUICKBOOKS General Lookup/Validation Table

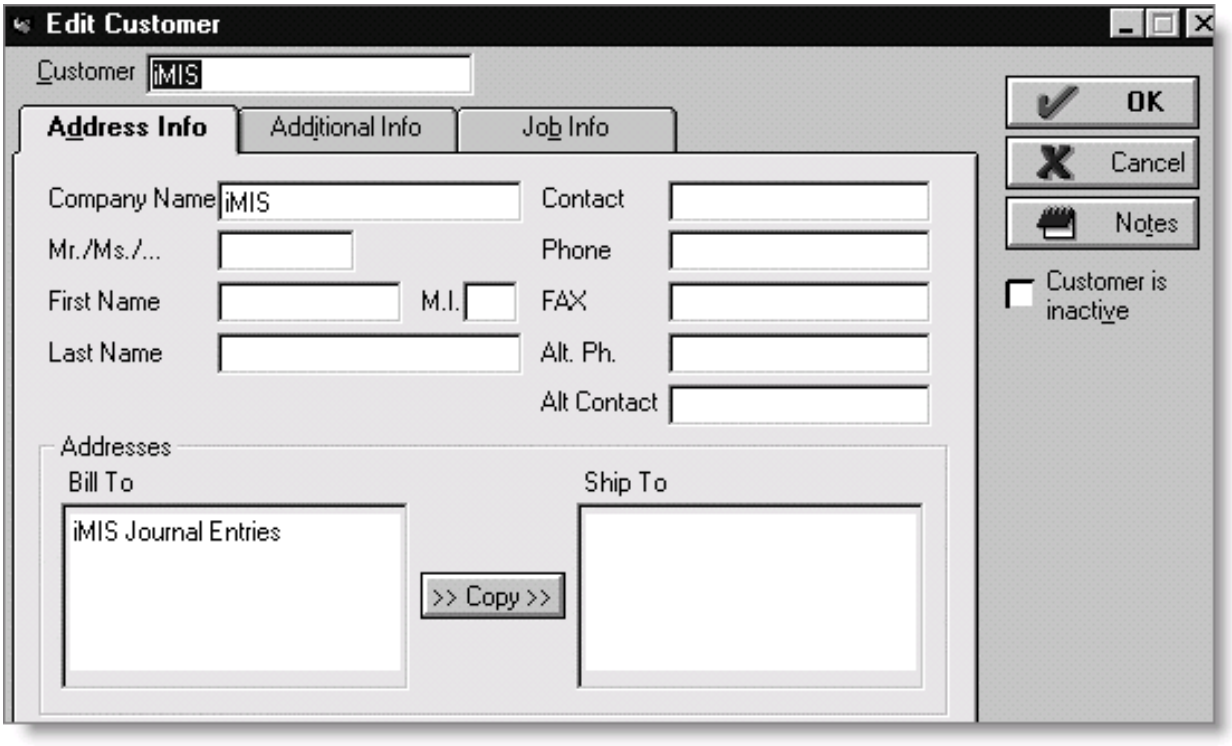
   You must follow these steps if you process sales tax through iMIS. If not, you can skip them. Creating this validation table will associate the QuickBooks vendor with your tax account in the GL_ACCOUNT table. All entries in the export file for this GL Account will be assigned to the appropriate vendor, instead of the Quickbooks customer “iMIS”.

1. From Customers, select Set up tables > General lookup/validation to open the General lookup/validation window.
2. Select (New Table) from the list of table types. The New Table Type window opens.
3. Enter a New Table named QUICKBOOKS and click Save.
4. Click New and insert a new record with the code equal to your tax liability account in the Code field.
5. In the Expansion field, fill in the Quickbooks Vendor Name associated with your tax liability account.
6. Click Save.

   To set up Quickbooks Pro

1. The setup within Quickbooks Pro includes a simple step to set up a special iMIS customer account to which all accounts receivable amounts will be linked.

2. Select Lists > Customer:Job List.
3. From the Customer:Job List window, select New from the Customer:Job List drop-down list.
4. Assign the code “iMIS” as the Customer Name and complete any other fields, as desired.
5. Click OK.

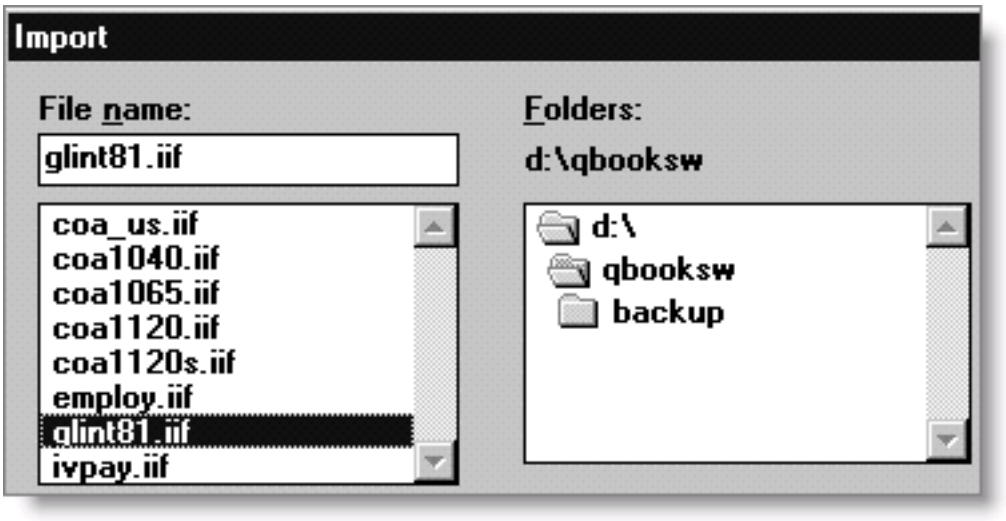


To create the export file from iMIS (Quickbooks Pro)

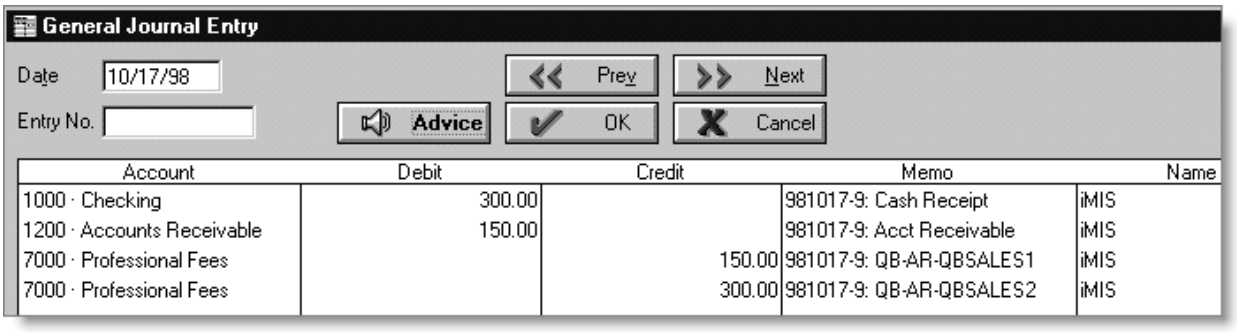
1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

To import data into Quickbooks Pro

1. Select File > Import.
2. In the Import window, locate and double-click the appropriate iMIS export/import file.



3. Once imported, you can view the data by selecting Activities > Make Journal Entry and choosing the Previous and/or Next buttons until the entry or entries are located.



Account	Debit	Credit	Memo	Name
1000 · Checking	300.00		981017-9: Cash Receipt	iMIS
1200 · Accounts Receivable	150.00		981017-9: Acct Receivable	iMIS
7000 · Professional Fees		150.00	981017-9: QB-AR-QBSALES1	iMIS
7000 · Professional Fees		300.00	981017-9: QB-AR-QBSALES2	iMIS

Export/Import File Example

The export/import file is a simple fixed-length export/import file that contains a heading section, a transaction header line for each journal entry to be created, and detail document lines for each additional debit or credit entry in that group (determined by the Summarize By field in iMIS). For example, if you summarize by batch, the first line of the export file for a batch containing payments and meeting registrations may show the Accounts Receivable total for the batch on the first line, followed by lines with totals for each additional GL account/pseudo-account in that batch.

Each group of entries are posted to QuickBooks under a single transaction, with transaction type of JOURNAL. iMIS generates a new journal entry each time the following is encountered:

- A new transaction date (for Day or Detail summary methods)
- A new batch (for Batch summary methods)

The following export/import example shows a small interface file for two batches across one date, summarized in iMIS by batch. Each batch is set off by a beginning line that starts with
TRNS and an ending line containing only “!ENDTRNS.” Each set of entries is recorded in QuickBooks

!TRNS TRNSTYPE DATE ACCNT NAME MEMO AMOUNT

!SPL TRNSTYPE DATE ACCNT NAME MEMO AMOUNT

!ENDTRNS

TRNS GENERAL JOURNAL 03/10/11 1-1100 iMIS PAY, DEMO-ORDER-PAY 38.00

SPL GENERAL JOURNAL 03/10/11 1-1150 iMIS DIST, DEMO-ORDER-INV -12.57

SPL GENERAL JOURNAL 03/10/11 1-1200 iMIS AR, Acct Receivable 120.25

SPL GENERAL JOURNAL 03/10/11 1-2350 iMIS DIST, DEMO-ORDER-TAX/TX -2.25

SPL GENERAL JOURNAL 03/10/11 1-4000 iMIS DIST, DEMO-MEETING-BAMS/TECH -50.00

SPL GENERAL JOURNAL 03/10/11 1-4000 iMIS DIST, DEMO-ORDER-V101 -30.00

SPL GENERAL JOURNAL 03/10/11 1-4500 iMIS DIST, DEMO-MEETING-BAMS/GOLF -70.00

SPL GENERAL JOURNAL 03/10/11 1-4900 iMIS DIST, DEMO-ORDER-HANDLING_2 -1.00

SPL GENERAL JOURNAL 08/30/05 1-5150 iMIS DIST, DEMO-ORDER-COGS 12.57

SPL GENERAL JOURNAL 03/10/11 1-5400 iMIS DIST, DEMO-ORDER-FREIGHT_2 -5.00

ENDTRNS

TRNS GENERAL JOURNAL 03/10/11 1-1200 iMIS AR, Acct Receivable 38.00

SPL GENERAL JOURNAL 03/10/11 1-4500 iMIS DIST, DEMO-MEETING-BAMS/GOLF -38.00

ENDTRNS

Solomon IV – Read Consolidation File

iMIS provides support to meet export/import requirements for Solomon IV Read Consolidation File. This support is in place in iMIS LAN version 3.00e or greater and iMIS version 3.30d or greater.

The standard Solomon IV Interface makes use of the built-in Solomon IV general ledger consolidation option. The export file created by iMIS when the Solomon IV option is chosen from the GL Interface down drop list is formatted according to the requirements of the import file needed by the General Ledger - Read Consolidation File window (01.510.00).

Make sure all GL accounts in iMIS match the accounts in Solomon's charge of accounts (and sub-accounts, if used in Solomon). When you enter a GL account in iMIS, use the format AAAA-SSSS, where A=the account number (i.e. 1200 for AR) and SSSS=sub-account number (defined in Solomon). The length of the account or sub-account can vary, and is defined in Solomon.

Note: iMIS currently supports two methods to export/import general ledger or financial data to Solomon IV. Financial transaction data can either be exported/imported using the Read Consolidation File method discussed here, or through the Transaction Import Utility. You may wish to review the import steps for both options before deciding which one you would prefer to use. For those users who are licensed for the iMIS Accounts Payable Interface, AP vendor and transaction data can only be imported using the Transaction Import Utility.

Note: Address line 3, which was added in iMIS 10.6, is not exported because the Transaction Import utility does not support it.

To set up iMIS for Solomon IV – Read Consolidation File

A Currency ID is required in the Read Consolidation import file as of Solomon IV version 4.21. A field was added to the AR/Cash General Ledger Interface window in iMIS version 4.41.

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Solomon IV.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.

   For best results, set the extension of the file name to .txt (i.e., I:\IMIS\GLINT.TXT).

- Use a # sign in the file name to instruct iMIS to create files for each iMIS organization code, with the ORG code inserted in the file name.
- Use a ? mark in the file name to instruct iMIS to create sequentially numbered files with each subsequent file that is generated.

  For example, #glint?.dta will create ORG1glint1.txt and ORG2glint1.txt for the first export and ORG1glint2.txt and ORG2glint2.txt for the next export.

6. Enter the Currency ID from your Solomon GL Setup (Module > General Ledger > GL Setup > Currency Info tab). The Currency ID field only displays when the Solomon IV GL interface type is chosen.
7. Click Save.

   To create the export file from iMIS (Solomon IV – Read Consolidation File)

1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal. If batch processing is enabled, only posted batches are included.

   To import data into Solomon IV – Read Consolidation File

   The steps to import data into Solomon IV using this method are:

1. Choose General Ledger > Read Consolidation.
2. At the prompt, Name of File to be Read, enter the export file name including the path name that you specified in iMIS. Notice that a Browse button is available to help you locate the file without typing it in.
3. At the prompt, Period to Post, enter the appropriate fiscal month and year for the transactions that are being imported. For example, the second fiscal period of 2002 would be entered as 02-2002.
4. Click the Begin Processing button to start the import process. A status box will appear to processing status information. When finished, it will inform you of the location of the log file to check for any errors, etc.
5. If errors occurred, the most likely problem may relate to validity errors with the GL account or the sub account. The error messages will point you to the exact error for your review.
6. If the import was successful, you can review the imported iMIS batch by choosing General Ledger > Journal Transactions. To locate the iMIS batch, you can press the F3 function key at the Batch Nbr prompt.
7. From this window, you may wish to select the Quick Print button to get a printout of the imported iMIS batch.
8. To make the batch ready for posting, select Release Now from the Batch Handling drop-down list.
9. To post the iMIS batch, choose General Ledger > Post Transactions.

   File Layout Example

'1200' '1' '1200' '06/01/2001' 'AR, GEN-MEETING-AR' '1500.00' 'D' 'BAS'

'4300' '1' '4300' '06/01/2001' 'DIST, DEMO_AR_LABELS' '1500.00' 'C' 'BAS'

@

File layout definition:

Field Name , Sample Data , Comments

1 account number, '1200', iMIS account number field, up to first dash (-)

2 subaccount number, '1', from iMIS account number field, after the dash (-)

3 ref number, '1200', iMIS account number field, up to first dash (-); Solomon Ref#

4 date, '06/01/2001'

5 description, 'AR, GEN-MEETING-AR'

6 amount, '1500.00'

7 credit or debit, 'D'

8 currency, 'BAS', entered in AR/Cash GL Interface setup in iMIS

9 end of file marker, '@'

Solomon IV – Transaction Import Utility

iMIS provides support to meet export/import requirements for Solomon IV – VI Transaction Import utility. This support is in place in iMIS LAN version 3.5 or greater and iMIS version 3.31 or greater.

Make sure all GL accounts in iMIS match the accounts in Solomon's charge of accounts (and sub-accounts, if used in Solomon). When you enter a GL account in iMIS, use the format xxxx-yyyy, where xxxx=the account number (i.e. 1200 for AR) and yyyy=sub-account number (defined in Solomon). The length of the account or sub-account can vary, and is defined in Solomon.

Note: iMIS currently supports two methods to export/import general ledger or financial data to Solomon IV. Financial transaction data can either be exported/imported using a Read Consolidation File option with Solomon IV, or through the Transaction Import Utility. You may wish to review the import steps for both options before deciding which one you would prefer to use. For those users who are licensed for the iMIS Accounts Payable Interface, AP vendor and transaction data can only be imported using the Transaction Import Utility. Refer to the Solomon System Manager manual for additional details on Transaction Import.

Note: Address line 3, which was added in iMIS 10.6, is not exported because the Transaction Import utility does not support it.

The following paragraphs provide some implementation setup tips for integrating iMIS with Solomon IV using the Transaction Import Utility.

The iMIS to Solomon IV (- TI) Interface works through the Solomon IV Transaction Import utility. The Transaction Import utility serves as the bridge to bring information from outside packages, such as iMIS, into the normal Solomon IV files. This utility provides the mechanism for bringing financial (accounts receivable/cash/income) data generated through iMIS into your Solomon IV General Ledger. If you are licensed for the iMIS AP Interface, it also provides the vehicle for imported vendor and accounts payable transaction data into Solomon IV for generating refund checks.

Note: The Solomon IV SQL-TI works the same as Solomon IV-TI except that the Ledger ID for the set of books that the transactions will be posted to must be specified in the export/import records.

The monthly (or more frequent) interface runs are quite straightforward.

On the Solomon IV side, the only setup required is to copy the control files supplied specifically for iMIS imports to the Solomon directory. The control files give the Solomon transaction import utility specific instructions as to how to import export data generated from iMIS. The control files for iMIS exports can be downloaded from the ASI Technical Support website. The following files should be copied into the main Solomon directory.

Solomon will report an error that the file cannot be opened if the file is not in the expected directory. The control files are:

For the Financial Systems (GL) Interface:

- IMIS.CTL – Control file to support the GL transaction import for Solomon IV-TI
- IMISSQL.CTL – Control file to support the GL transaction import for Solomon IV SQL-TI

For the Accounts Payable Interface:

Note: Solomon only allows 10 characters for the vendor ID, which includes the letter "I" plus the iMIS member ID. Therefore, the member ID cannot exceed nine (9) characters in order to support the processing of refunds in Solomon.

- IMISVEN.CTL – Control file to support the Vendor import
- IMISAP.CTL – Control file to support the Voucher import

To set up iMIS for Solomon IV – Transaction Import Utility

The setup steps from iMIS include making appropriate choices on the AR/Cash General Ledger Interface window and a required step to establish a SOLOMON general/lookup validation table.

The iMIS setup steps are described in detail below:

Step 1 – Change the GL Interface Type

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Solomon IV-TI or Solomon IV SQL-TI. If you are using Solomon VI, select a Solomon interface type.

- Select Solomon IV-TI if Ledger IDs are NOT used in Solomon.
- Select Solomon IV SQL-TI if multiple Ledger IDs are used in Solomon.

4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.

   For best results, set the extension of the file name to .DTA (i.e., I:\IMIS\GLINT.DTA). The .DTA extension will make it easier to find the import file using the lookup window.

- Use a # sign in the file name to instruct iMIS to create files for each iMIS organization code, with the ORG code inserted in the file name.
- Use a ? mark in the file name to instruct iMIS to create sequentially numbered files with each subsequent file that is generated.

  For example, #glint?.dta will create ORG1glint1.dta and ORG2glint1.dat for the first export and ORG1glint2.dta and ORG2glint2.dta for the next export.

6. Click Save.

   Step 2 – Set up a special SOLOMON General Lookup/Validation Table

   You must follow these steps if you process sales tax through iMIS. If not, you can skip them.

1. From Customers, select Set up tables > General lookup/validation to open the General lookup/validation window.
2. Select (New Table) from the list of table types. The New Table Type window opens.
3. Enter a New Table named SOLOMON and click Save.
4. Click New and insert a new record with the code of LEDGER in all caps in the Code field.
5. In the Expansion field, fill in the correct codes for Solomon IV Ledger ID.
6. Click Save.

   To create the export file from iMIS (Solomon IV – Transaction Import Utility)

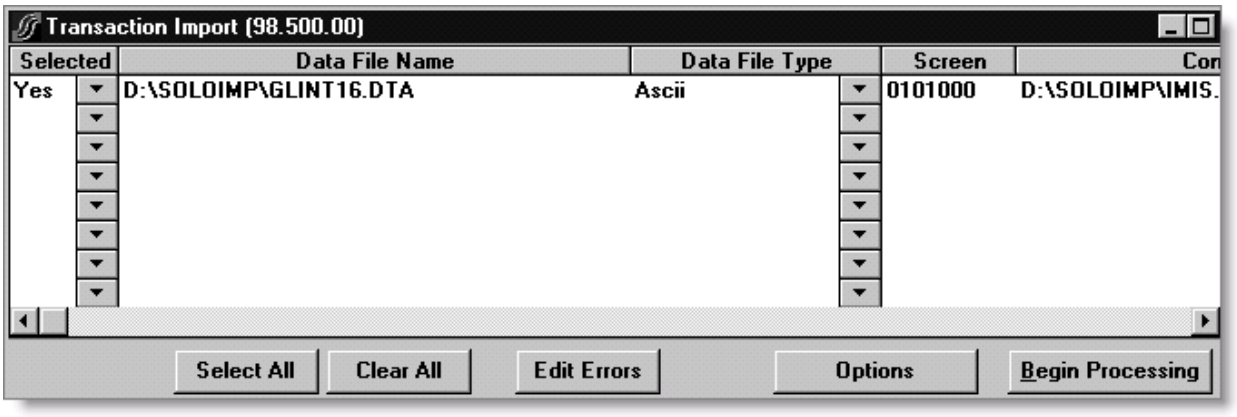
1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal. If batch processing is enabled, only posted batches

are included.

To import data into Solomon IV – Transaction Import Utility

After the new import files are created by iMIS, they can be imported into Solomon IV.

1. Select Transaction Import from the Solomon IV Utility menu.



2. Mark the first line as selected.
3. For the data file name enter the output file name including the path name that you specified in iMIS in the second column or press F3 to open a search dialog window. The third column should default to ASCII.
4. Select the screen in the fourth column by pressing F3. The following list of screens displays:

- 0101000 (Journal Transactions) for GL Import
- 0327000 (Vendor Maintenance) for Vendor Import
- 0301000 (Voucher and Adjustment Entry) for Voucher Import

5. Scroll over and enter the import control file into the fifth column. The import control file describes the import file. Select the control file from the following options:

- IMIS.CTL for GL Import without Ledger ID (Solomon IV -TI), or
  IMISSQL.CTL for GL Import with Ledger ID (Solomon IV SQL -TI)

- IMISVEN.CTL for Vendor Import
- IMISAP.CTL for Voucher Import

6. In the sixth column, enter a file name for the creation of an error or log file to be created during the import.
7. Enter the appropriate import control file name including the path name or press F3 to open a search dialog window. The seventh column should read Minimized and should not be changed.
8. Select Begin after you have filled in all columns. If you named an error file, you can review the status of the import through Edit Errors.

   This is an example of a normal error log output for a general ledger transaction import. The sample error log is configured to include “all import data”, and the Batch is out of balance message will always appear until the user enters a control and posts the batch. Make sure the number of errors near the end of the log file is zero.

   'System Message 8000: Start Processing Wed Feb 23 04:07 P.M.

   'System Message 8042: Transaction Import Processing Combine Edit and Update mode

   'System Message 8040: Database Name SSTRIAL

   'System Message 8011: ========Begin Processing of a Batch Data Line========

   '"Batch",,GJ,N,199607,R,-1,0,0

   'System Message 8005: New Record Requested

   'System Message 8012: ========Successful Processing of a Batch Data Line-========

   'System Message 8011: ========Begin Processing of a Detail Data Line========

   '"Detail",1020,00-000-00-00-00-0,,03/03/2011,"110301-2: AR, TEST-AR -17",,1719.38

   'System Message 8005: New Record Requested

'System Message 8012: ========Successful Processing of a Detail Data Line-========

'System Message 8011: ========Begin Processing of a Detail Data Line========

'"Detail",1110,00-000-00-00-00-0,, 03/03/2011," 110301-2: PAY, DEMO-AR-PAY",1719.38,

'System Message 8005: New Record Requested

'System Message 8012: ========Successful Processing of a Detail Data Line-========

'System Message 818: Batch is out of balance by 1719.38. Do you want to edit?

'System Message 8030: The Number of Errors detected was 0

'System Message 8001: Completed Processing Wed Feb 23 04:07 P.M.

Tip: Two import files (Vendor & Invoice) are required to support the AP Interface. You can shortcut your steps by entering the import instructions for both files (Vendor First) on one Transaction Import window.

1. When the import is complete, review the general ledger import batch through the General Ledger > Journal Transactions window.
2. Select Accounts Payable > Voucher and Adjustment for the AP interface, to review the batch of transactions. If you press F3 at the Batch Nbr field, the newly imported batch should be the first batch in the list.
3. To process/post the batch, fill in the batch control amount with the amount shown as the debit or credit amount at the bottom of the window.

4. Print the iMIS GL transaction batch using the Quick Print button at the lower left corner of the window. (For the AP batch report, select Accounts Payable > Reports > AP Edit.)
5. When you are ready to post the batch, change the Batch Handling drop-down list to Release Now.
6. Select General Ledger > Post Transactions to post the iMIS batch.

File Layout Examples

Financial Systems Interface – Solomon IV-TI

General Ledger Transaction Import/Export output file contains a batch header line and any number of detail lines:

"Batch",,GJ,N,200506,B,-1,0,0

"Detail",1100,0001,,06/13/2005,"PAY, DEMO-AR-PAY",100.00,

"Detail",1100,0001,,06/13/2005,"PAY, DEMO-MEETING-PAY",50.00,

"Detail",4000,0001,,06/13/2005,"DIST, DEMO-AR-LABELS",,100.00

"Detail",1250,0001,,06/13/2005, "DUE TO BLDG",,50.00

Layout definition:

Header record ("Batch")

Field Name Sample Data Comments

1 Record type "Batch"

2 Batch number blank

3 Journal Type GJ see Solomon journal type codes

4 Batch Type N see Solomon batch type codes

5 Period Posted 200506 taken from Trans.FISCAL_PERIOD

6 Batch Handling B see Solomon batch handling codes

7 Auto Ref # -1 turns auto-ref numbers on

8 Auto Reverse 0 turns auto-reverse off

9 Ctrl total 0 sets control total to zero for the batch

Detail records ("Detail")

Field Name Sample Data Comments

1 Account 1100

2 Subaccount 0001

3 Ref # blank

4 Trans date 06/13/2005

5 Trans description "PAY, DEMO-AR-PAY"

6 Dr amount 100.00

7 Cr amount blank

Financial Systems Interface – Solomon IV SQL-TI

General Ledger Transaction Import/Export output file contains a batch header line and any number of detail lines:

"Batch",,GJ,N,200506,"ACTUAL",B,-1,0,0

"Detail",1100,0001,,06/13/2005,"PAY, DEMO-AR-PAY",100.00,

"Detail",1100,0001,,06/13/2005,"PAY, DEMO-MEETING-PAY",50.00,

"Detail",4000,0001,,06/13/2005,"DIST, DEMO-AR-LABELS",,100.00

"Detail",1250,0001,,06/13/2005, "DUE TO BLDG",,50.00

Layout definition:

Header record ("Batch")

Field Name Sample Data Comments

1 Record type "Batch"

2 Batch number blank

3 Journal Type GJ see Solomon journal type codes

4 Batch Type N see Solomon batch type codes

5 Period Posted 200506 taken from Trans.FISCAL_PERIOD

6 Ledger ID "ACTUAL" from the iMIS validation table entry

7 Batch Handling B see Solomon batch handling codes

8 Auto Ref # -1 turns auto-ref numbers on

9 Auto Reverse 0 turns auto-reverse off

10 Ctrl total 0 sets control total to zero for the batch

Detail records ("Detail")

Field Name Sample Data Comments

1 Account 1100

2 Subaccount 0001

3 Ref # blank

4 Trans date 06/13/2005

5 Trans description "PAY, DEMO-AR-PAY"

6 Dr amount 100.00

7 Cr amount blank

Accounts Payable Interface

Sample output for the Vendor Import/Export file:

Vendor,I136,"A","Sailing Dreams, Inc.",2100,0001,"U","Sailing Dreams, Inc.","Ms. Margaret K. Nelson",,"P.O. Box 8765","","Dallas","TX","75206-8765",,,,"Sailing Dreams, Inc.","Ms. Margaret K. Nelson",,"P.O. Box 8765","","Dallas","TX","75206-8765",,,,"N"

Layout definition:

Header record ("Batch")

Field Name Sample Data Comments

1 Record type "Vendor"

2 Vendor Code "I136" Always "I" plus the appropriate iMIS ID

3 Status "A" Active

4 Name "Sailing Dreams..." Stores as the Solomon Vendor name

5 AP Acct 2100

6 AP Sub-acct 0001

7 Pay date "U" Designates 'due date'

8 Name1 "Sailing Dreams..."

9 Attn1 "Ms. Margaret..." From the iMIS name fields

10 Salutation blank

11 Addr1 "P.O. Box..." Preferred Bill address fields

12 Addr2

13 City "Dallas"

14 State "TX"

15 Zip "75206-8765"

16 Country blank

17 Phone blank

18 Fax blank

19 Remit Name "Sailing Dreams..."

20 Remit Attn1 "Ms. Margaret..." From the iMIS name fields

21 Remit Salutation blank

22 Remit Addr1 "P.O. Box..." Preferred Bill address fields

23 Remit Addr2

24 Remit City "Dallas"

25 Remit State "TX"

26 Remit Zip "75206-8765"

27 Remit Country blank

28 Remit Phone blank

29 Remit Fax blank

30 ReceiptAccept "N" N = 'accept quantity / no warning'

Sample output for the AP Transaction or Invoice Import/Export file, which includes a separate voucher and detail transaction line for each invoice in need of a refund:

Docu-
ment,"","VO",06/24/2005,"A","",06/24/2005,"I136",,,06/24/2005,06/24/2005,45.00,45.00,-2100,0001

Transaction,2500,0001,45.00,"Refund: R95 Books Are Good"

Layout definition:

Detail record ("Document")

#	Field Name	Sample Data	Comments
1	Ref Nbr	blank	
2	Doc Type	"VO"	for voucher
3	Doc Date	"06/24/2005"	
4	Status	"A"	for Active
5	Invc Num	blank	
6	Invc Date	"06/24/2005"	
7	Vendor ID	"I136"	"I" plus the iMIS member ID
8	PO #	blank	
9	Terms	blank	
10	Due Date	"06/24/2005"	
11	Pay Date	"06/24/2005"	
12	Orig Doc Amt	45.00	
13	Disc Bal	45.00	
14	AP Acct	2100	
15	AP Sub-acct	0001	

Detail record ("Transaction") - this is a detail line for the preceding Document record

#	Field Name	Sample Data	Comments
1	Acct	2500	

2 Sub-acct 0001

3 Trans amt 45.00

4 Trans Descr "Refund: R95 Books Are Good"

Note: Solomon only allows 10 characters for the vendor ID, which includes the letter “I” plus the iMIS member ID. Therefore, the member ID cannot exceed nine (9) characters in order to support the processing of refunds in Solomon.

Unsupported Interfaces

Access Accounts for Windows

iMIS provided support to meet export requirements for Access Accounts for Windows 95 version 3.41B or greater. This support was in place in iMIS LAN as of version 3.50b and iMIS as of version 4.01.

To set up iMIS for Access Accounts

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Access Accounts.
4. Select an option from the Summarize by drop-down list.
5. (Recommended) For the Output file path/name, enter the Access\Import subdirectory for the path and NOMJRNLS.TXT for the file. This is the default path location and file name where Access Accounts will use for importing general ledger transactions.

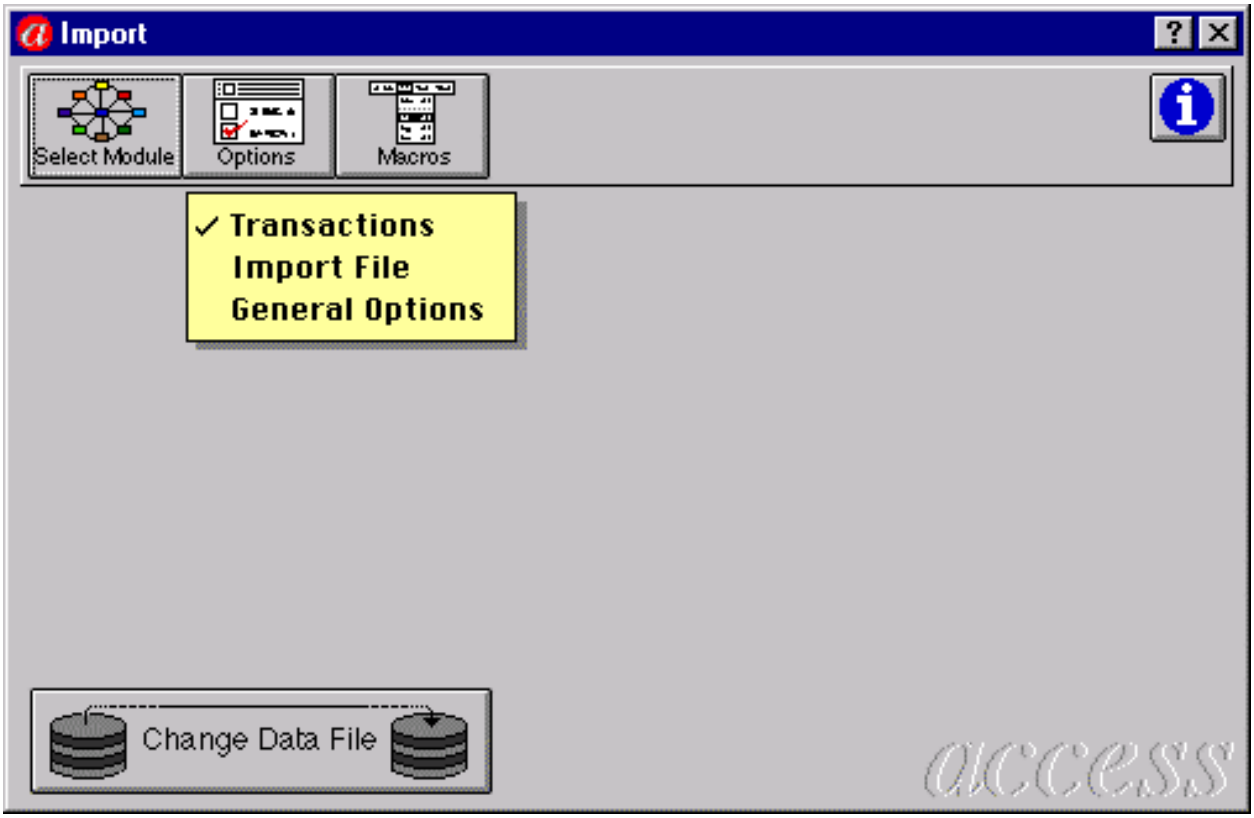
   Note: Optionally, you can enter a different path and/or file name than the default settings, as outlined above. For example, you can enter a file name that contains the allowed special characters (for example, ? to append a sequential number, # to create multiple export files for multiple entities). If you elect to use a non-default path and/or file name, be sure to choose the Always Prompt for Files option in the Access Accounts setup.

   To create the export file from iMIS (Access Accounts)

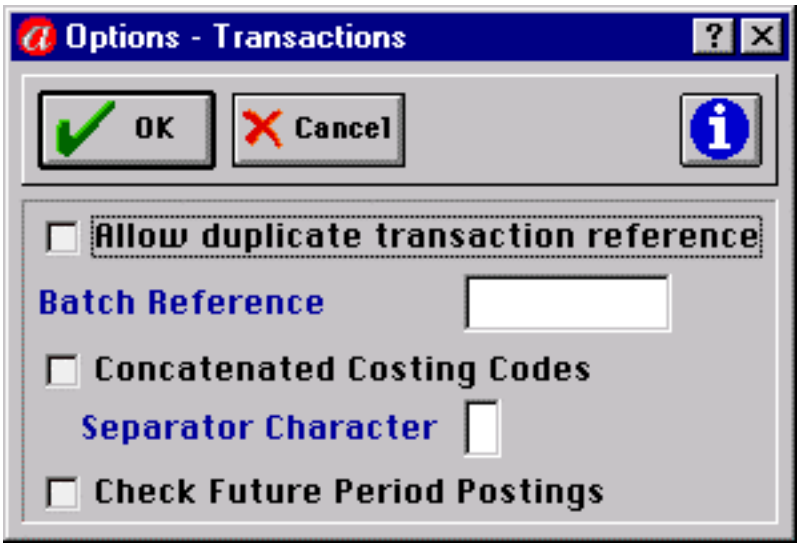
1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

   To import data into Access Accounts

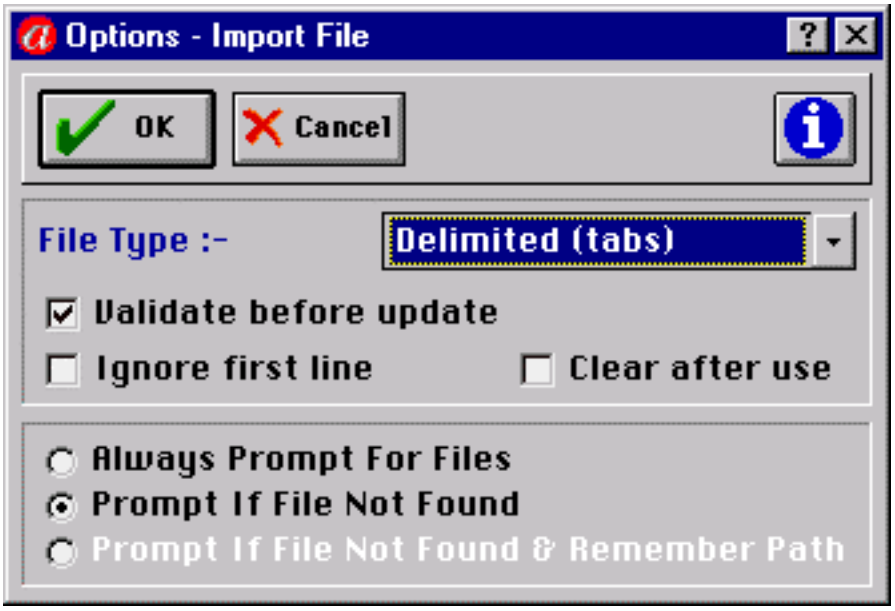
1. Open the Access Import/Export Utility.
2. Select Access Accounts > Import.
3. Select Options > Transactions.



4. (Recommended) Ensure that all options remain unchecked, as displayed below. Click OK.



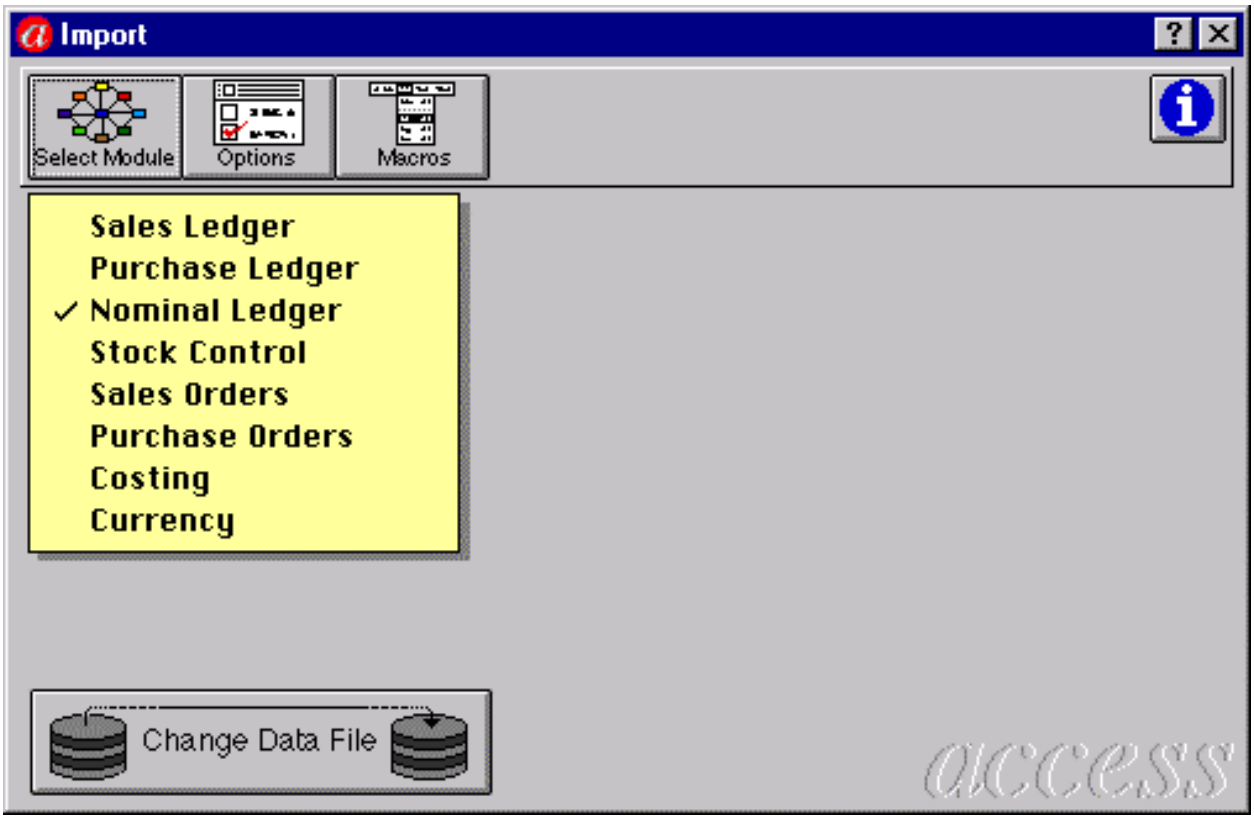
5. Click the Options button and select Import File.
6. Select Delimited (tabs) from the drop down list for the File Type.
7. Enable the Validate before update checkbox.
8. (Recommended) Select the Prompt if File Not Found radio button if the default path and file name were entered at the iMIS setup step 3 above. Otherwise, select the Always Prompt for Files options.



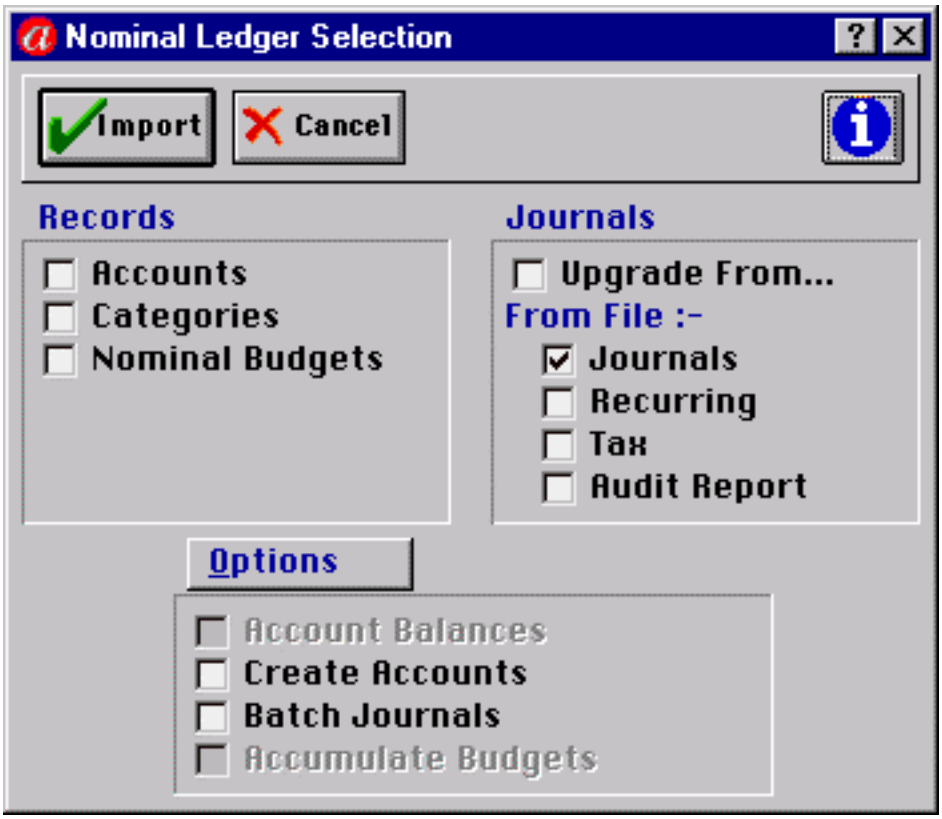
9. Click OK.

To integrate the General Ledger from Access Accounts

1. Open the Access Import/Export Utility.
2. Select Access Accounts > Import.
3. Click the Select Module button and select Nominal Ledger.



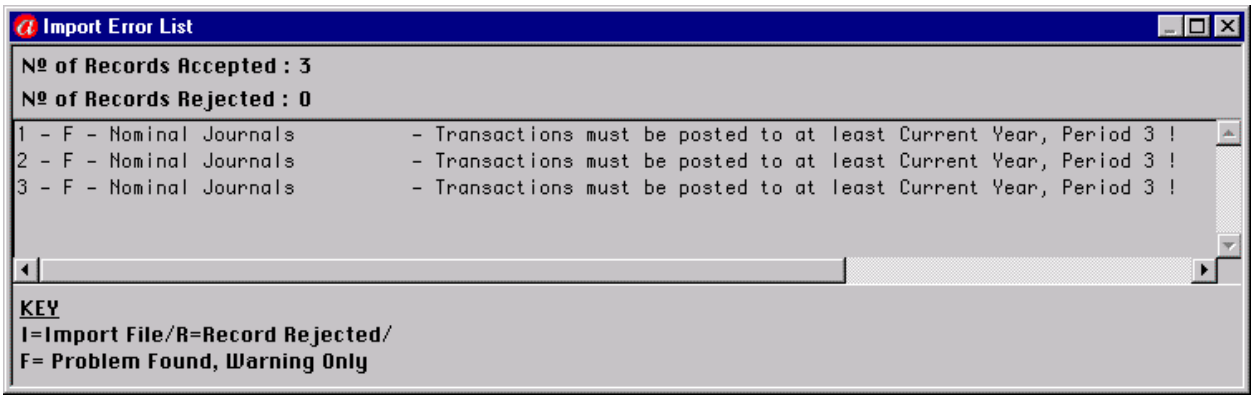
4. In the Nominal Journal Selection window, enable only the From File: - Journals checkbox only. Ensure that all other options are disabled or unchecked, as in the example below.



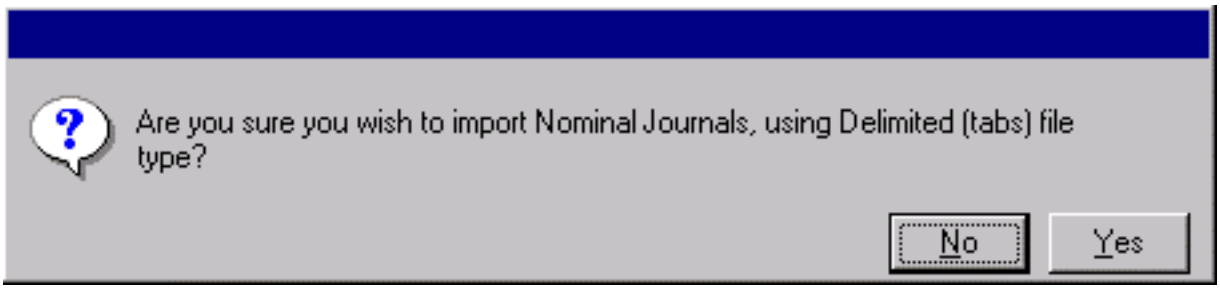
5. Click the Import button.
6. To proceed with the import validation process, answer or click Yes to the next four pop-up questions:

- Have you taken a backup of your data?
- The import routine may take a long time! Are you sure you wish to continue?
- Do you wish to validate Nominal Journals?
- Are you sure you wish to validate Nominal Journals, using Delimited (tabs) file type?

7. As the transactions are tested for validity, an error list is generated. It is normal to get Warnings concerning the fiscal period. Investigate problems if you received other types of errors (for example, the No. of Records Rejected is greater than 0).



8. Begin the actual import process by repeating steps 4 and 5 above.
9. Answer or click No to Do you wish to validate Nominal Journals?
10. Answer or click Yes to the following pop up question if you only received warning messages about the fiscal period.



11. After the import is complete, you may receive another warning message about the fiscal period. You can close the window. Your iMIS GL Integration Entry should have posted to your Nominal Accounts area.

Export/Import File Example

The export/import file is a simple tab delimited file.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
363		07/16/1996					This is a test desc	C	113101	206			Detail Desc.		IMIS6
363		07/16/1996					This is a test desc	D	133700	106			Detail Desc.		IMIS6
363		07/16/1996					This is a test desc	D	133500	100			Detail Desc.		IMIS6

Business Works for Windows

iMIS provided support to meet export requirements for Business Works for Windows version 12.02 or greater. This support is was place in iMIS LAN 3.50d and in iMIS as of version 4.10.

To set up iMIS for Business Works

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Business Works.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.

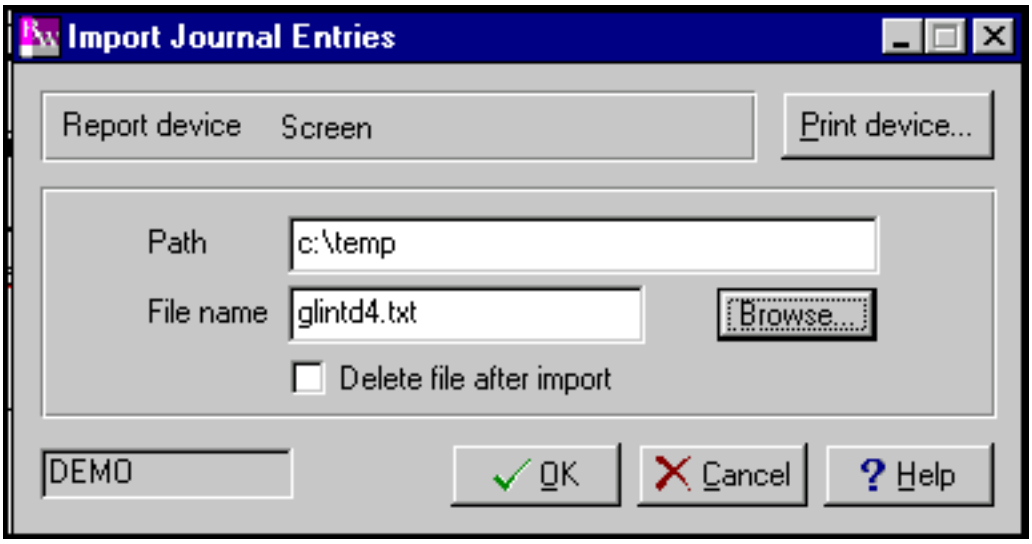
   Caution! Business Works can only accept 8-character file names.
6. Click Save.

To create the export file from iMIS (Business Works)

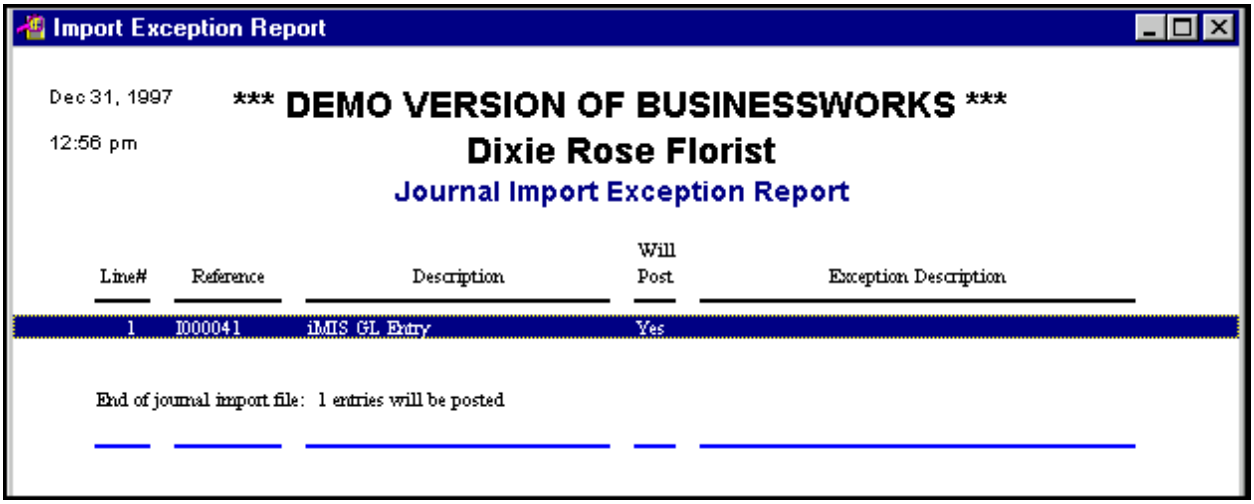
1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

To import data into Business Works

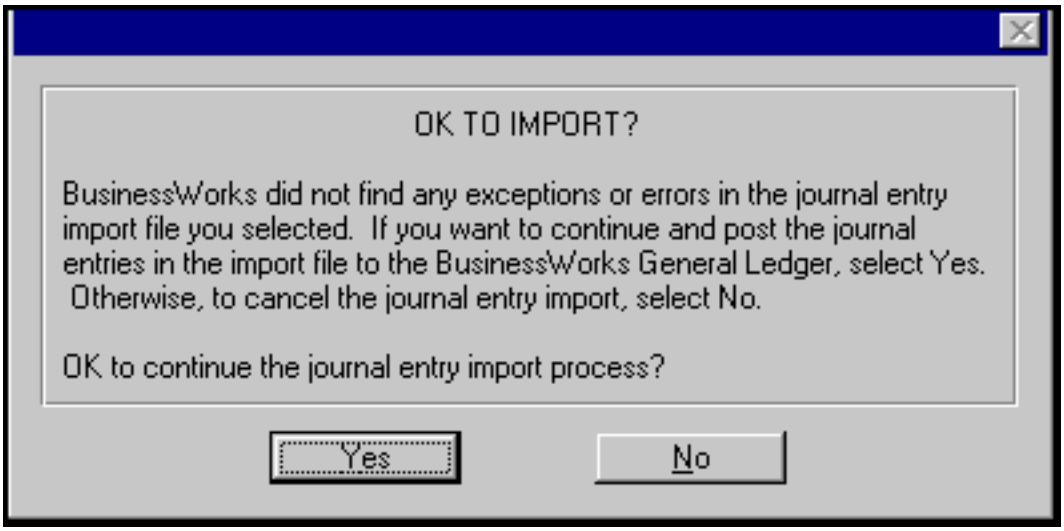
1. Select the Transfer > Import Journal Entries from the menu bar on the main Business Works window.
2. In the Import Journal Entries window, select the location where you want the exception report to be printed. Business Works will print an exception report for each import indicating the reasons why the import cannot be completed or warning of any potential problems.
3. Enter the path and file name of the file to be imported, or use the Browse button to locate the file to be imported.



4. Once the file is selected, click OK.
5. Click OK to the Journal Import Exception Report prompt.
6. Review the Exception Report for any errors.



7. You will be prompted whether or not to continue the import.



8. If there are no errors in the import file, click Yes. If errors do exist, click No, correct the file, and re-import the data.

   Export/Import File Example

   The export/import file is a simple comma-delimited file with a record for each transaction detail or summary line. Since each journal entry is limited to 99 records, be sure that the default Transfer/Clearing account is defined, in case a journal entry would normally exceed this limitation.

   Each record consists of seven fields, separated by commas, as follows:

   Sequence Number

   The sequence number is used to differentiate journal entries. This number must be unique, and all records in one journal transaction must have the same sequence number.

   iMIS will generate a new journal entry and Sequence Number each time the following is encountered:

1. The entry exceeds 90 lines (a transfer/clearing balancing line will be created)
2. A new transaction date (for Day or Detail summary methods)
3. A new batch (for Batch summary methods)

   Date

The date in MM/DD/YY format. Dates older than 24 months before the current month or more than 12 months in the future are not accepted.

Journal Number

The number is 0, for General Journal.

Reference

The reference field, which is used to identify a transaction, is a required field and cannot be blank. This identifier is a combination of the letter I for iMIS, the sequential GL interface run number, and a sequence number from the first field.

Description

The transaction description is typically “iMIS GL Entry.” It will include the batch number, if the Batch summary level is chosen.

Account Number

The General Ledger Account Number.

Amount

The transaction amount. Credits are denoted by a preceding minus sign.

The following export/import example shows a small interface file for the date of April 20, 2011

1,04/20/11,0,"I000041","iMIS GL Entry",1050.00,40.00

1,04/20/11,0,"I000041","iMIS GL Entry",1050.00,23.00

1,04/20/11,0,"I000041","iMIS GL Entry",6010.00,-23.00

1,04/20/11,0,"I000041","iMIS GL Entry",6010.00,-40.00

Note: After an export/import file is successfully imported, if you have not chosen to delete the file, the file will be flagged as imported. You will see an appropriate warning message if you attempt to reimport it.

Exact for Windows

The iMIS Financial Systems (GL) Interface module now provided support to meet import requirements for Exact for Windows version 3.11 or greater. This support was in place in iMIS version 4.11.

To set up iMIS for Exact

Step 1 – Change the GL Interface Type

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Exact.
4. Select an option from the Summarize by drop-down list.

   Note: Each import file is limited to 999 detail lines. We recommend you do not choose the Detail option.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.
6. Click Save.

Step 2 – Set up a special EXACT General Lookup/Validation Table

Create a new General Lookup/Validation Table to setup Accounts Receivable entries for export to Exact.

1. From Customers, select Set up tables > General lookup/validation to open the General lookup/validation window.
2. Create a new General Lookup/Validation Table to setup Accounts Receivable entries for export to Exact. Go to Customers > Set up tables > General lookup/validation.
3. Select (New Table) from the list of table types. The New Table Type window opens.

4. Enter a New Table named EXACT and click Save.
5. Click New and enter the following fields:

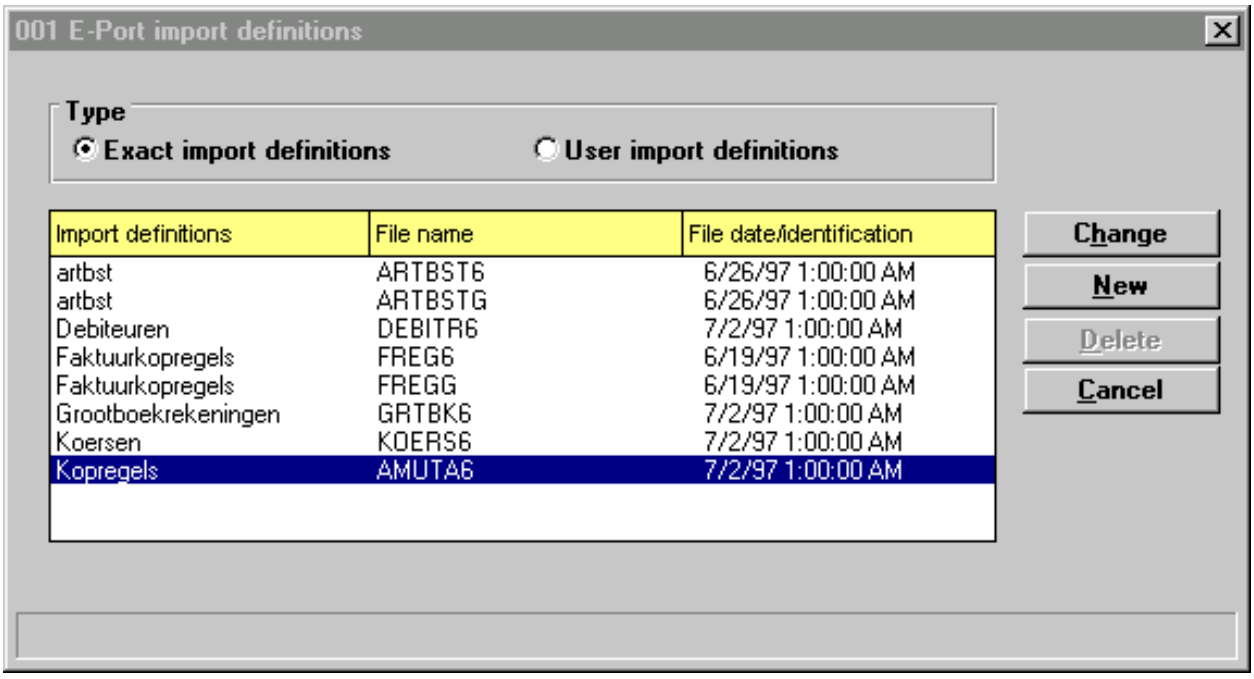
- Code: Must be a valid iMIS GL account for Accounts Receivable under Default Accounts for your Exact-compliant entity. In the example below, 1300 corresponds to the Domestic Debtors account in the demo data from Exact.
- Expansion: Must be a valid Debtor ID number from Exact (see Set up company – Financial > Debtor data > Debtors for a list of valid codes).
- Description: As appropriate.

To set up Exact

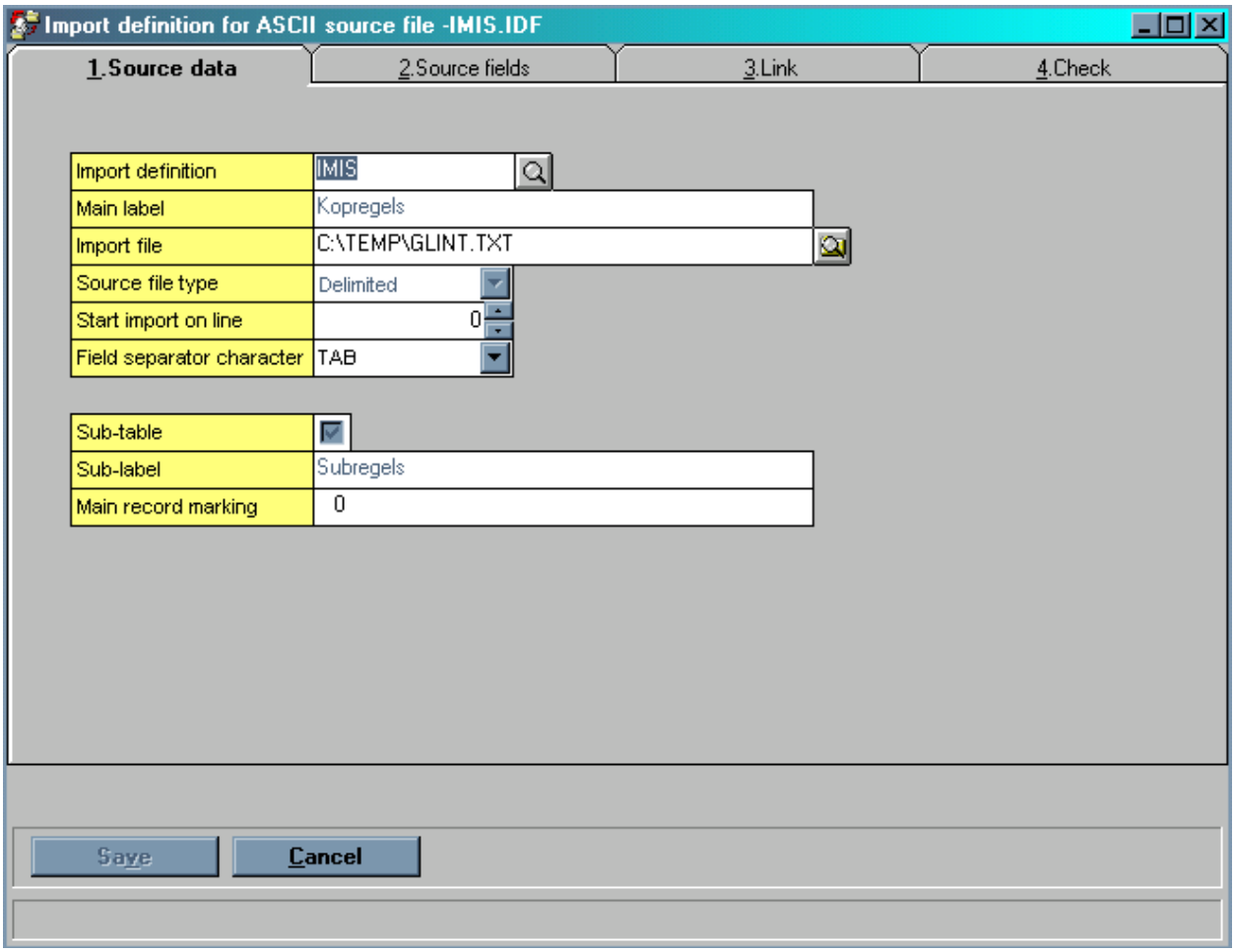
Note that iMIS assumes the General Journal number to be 90. If you do not have a journal 90 in place as a General Journal type, you should take the appropriate steps to enter one. Otherwise, the setup within Exact includes simple steps to modify the existing general journal import definition file, which will be used for both the Trial and Final Import processes.

Note: It is best to do this step with a sample or test export\import file available.

1. From Exact for Windows, select Menu > Systems Maintenance.
2. Choose File Control > Import > Definitions.
3. Select the Kopregels Import Definition (file name AMUTA6) and click the Change button.



4. From the Source Data tab, override the Import Definition name to IMIS. If appropriate, change the Import File or browse for the correct import path/file location.



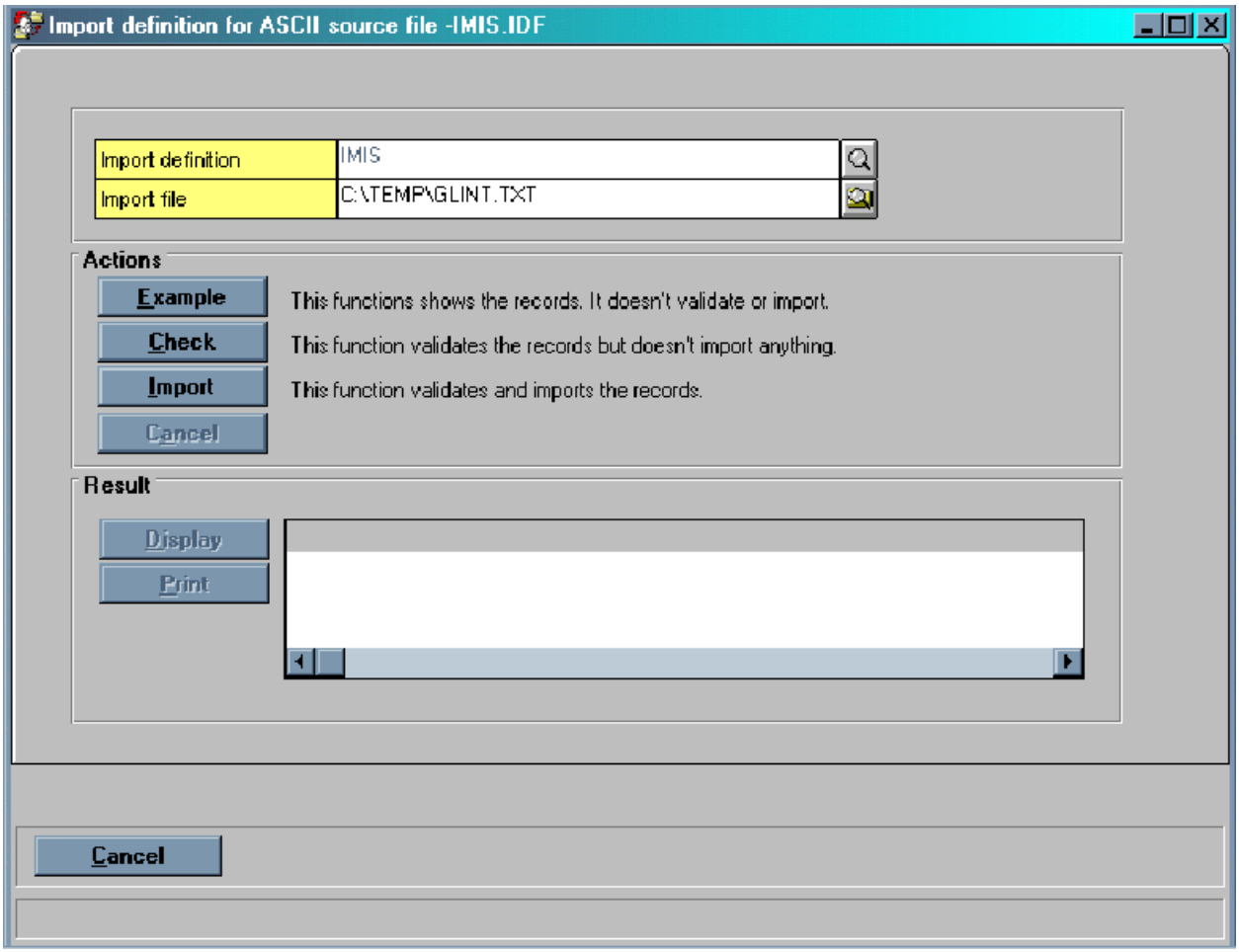
5. If you have a test import file, you can select the Check tab and click the Check button to validate the accuracy of the data.
6. Click Save.

To create the export file from iMIS (Exact)

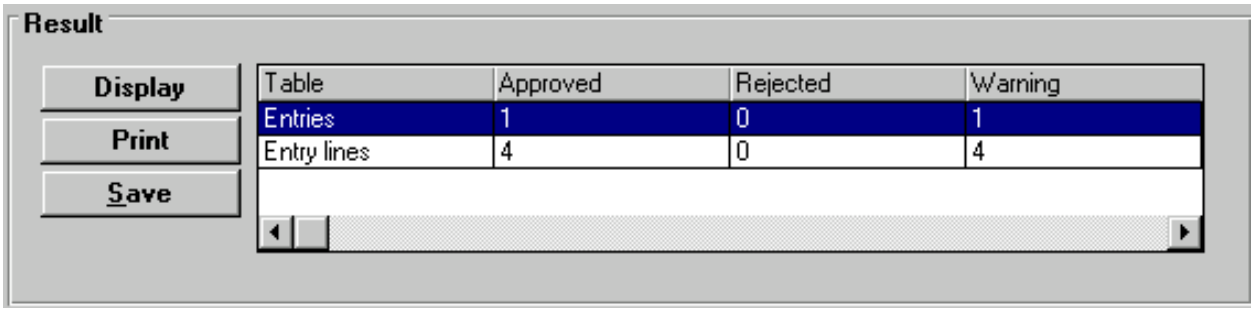
1. Generate the general ledger transaction export files using AR/Cash > Process month end procedures > Create GL Journal.

To import data into Exact

1. From Exact for Windows, select Menu > Systems Maintenance.
2. Choose File Control > Import > Import.
3. Select the User Import Definitions option.



4. Select the Kopregels/IMIS line and click the Open button.
5. Click the Check button to validate the import data. The summary results will display in the lower portion of the window. If there are any errors, you can highlight the line and click either the Display or Print buttons to review the warning or error messages.



6. If the data checked out properly, you can import the unposted batch by clicking the Import button on this window. You will be prompted about the backup status. Enter Y to proceed with the import.
7. To view the imported transaction, from the Financial menu select Enter>Enter>General Journal and do a lookup to locate the imported transactions. Note that you will not be able to edit the transactions from this window because the cash account is not normally included in a General Journal transaction.
8. To post the imported transaction, from the Financial menu select Process>Post Entries and process in the same manner as a normal posting run.

   Export/Import File Example

   The GL Interface process creates a file with a single line header and multiple detail lines (one for each debit and credit). Note that date values exported in field #8 (Date) for both the Import Header and Detail Lines are in a rearranged date format (DDMMYY). E-Port automatically rearranges the format to comply with the MM/DD/YY format in Exact for Windows.

   Import Header Line Sample

   "0" "M" "90" "04" "97" "" "iMIS GL:02/11/2011-
   02/11/2011" "110211" "" "" "" "" 0.00 "N" ""
   "" 0.00 "" "" "" 0.00 "" "" "B" 0.00 "" "" 0.00 "" "" "N" "" 0.00 0.-
   00 0.00 0.00 "" "" ""

   Import Detail Lines Sample (Summarized by Month)

   "1" "M" "90" "04" "97" "" "PAY, DEMO-DUES-
   PAY" "010411" "1100" "" "" "" 300.00 "" "" "" 0.00 "" "" ""
   "" "" "" 0.00 "" "" 0.00 "0" "" "N" "" 0.00 0.00 0.00 0.00 "" "" ""

   "2" "M" "90" "04" "97" "" "DIST, DEMO-DUES-
   BASIC" "010411" "1120" "" "" "" -150.00 "" "" "" 0.00 "" "" ""
   "" "" "" 0.00 "" "" 0.00 "0" "" "N" "" 0.00 0.00 0.00 0.00 "" "" ""

"3" "M" "90" "04" "97" "" "DIST, DEMO-DUES-
JOUR" "010411" "1130" "" "" "" -65.00 "" "" "" 0.00 "" "" ""
"" "" "" 0.00 "" "" 0.00 "0" "" "N" "" 0.00 0.00 0.00 0.00 "" "" ""

"4" "M" "90" "04" "97" "" "DIST, DEMO-DUES-
ACT" "010411" "1140" "" "" "" -45.00 "" "" "" 0.00 "" "" ""
"" "" "" 0.00 "" "" 0.00 "0" "" "N" "" 0.00 0.00 0.00 0.00 "" "" ""

When an outstanding balance exists, the entry to Accounts Receivable contains two additional fields that are required by the iMIS import definition (based on AMUTA6.IDF) in Exact. The Debtor ID (field 10) is required for successful import, and the Invoice Number (field 12) is required to successfully post the imported AR transactions to the General Ledger. See the following Import Header Line 2 and note that the Debtor ID (1510) must correspond to a valid entry in Exact.

The Invoice Number (00000001) is an arbitrary numeric constant. If necessary, you can manually modify this number from within Exact after the transactions have been imported, but before the GL entries are posted to the General Ledger.

To modify the invoice number

1. Go to the Financial menu. Select Enter > Enter > General Journal.
2. In the Jrnl field, enter the appropriate journal number (for example, 90).
3. Enter the appropriate FY.
4. Enter the appropriate Per. and Seq. for the corresponding GL entries, or click the magnifying glass icon to select the batch from a list.
5. Modify the Invoice field for the desired AR entries and click Save.

Import Header Line Sample

"0" "M" "90" "03" "11" "" "iMIS GL:03/15/11-
03/15/11" "150311" "" "" "" "" 0.00 "N" ""
"" 0.00 "" "" "" 0.00 "" "" "B" 0.00 "" "" 0.00 "" "" "N" "" 0.00 0.-
00 0.00 0.00 "" "" ""

Import Header Line Sample (Summarized by Batch)

```
"1"  "M"  "90"  "03"  "11"  ""  "110311-1: EXACT Cash
Rece"  "150311"  "1111"  ""  ""  ""  150.00  ""  ""  ""  0.00  ""  ""  ""
  ""  ""  ""  0.00  ""  ""  0.00  "0"  ""  "N"  ""  0.00  0.00  0.00  0.00  ""  ""  ""

"2"  "M"  "90"  "03"  "11"  ""  "110311-1: EXACT-AR-
AR"  "150311"  "1300"  "1510"  ""  "00000001"  50.00  ""  ""
  ""  0.00  ""  ""  ""
  ""  ""  ""  0.00  ""  ""  0.00  "0"  ""  "N"  ""  0.00  0.00  0.00  0.00  ""  ""  ""

"3"  "M"  "90"  "03"  "11"  ""  "110311-1: EXACT-AR-EXACT
"  "150311"  "4000"  ""  ""  ""  -200.00  ""  ""  ""  0.00  ""  ""  ""
  ""  ""  ""  0.00  ""  ""  0.00  "0"  ""  "N"  ""  0.00  0.00  0.00  0.00  ""  ""  ""
```

Platinum for Windows

iMIS provided support to meet export requirements for Platinum for Windows version 4.6 or greater. This support was for iMIS LAN version 3.51 and iMIS version 4.10.

In order to facilitate the interface, iMIS formats the transaction data into a Lotus spreadsheet format. The Lotus file is then imported into a journal batch using Platinum's Spreadsheet Import utility.

To set up iMIS for Platinum

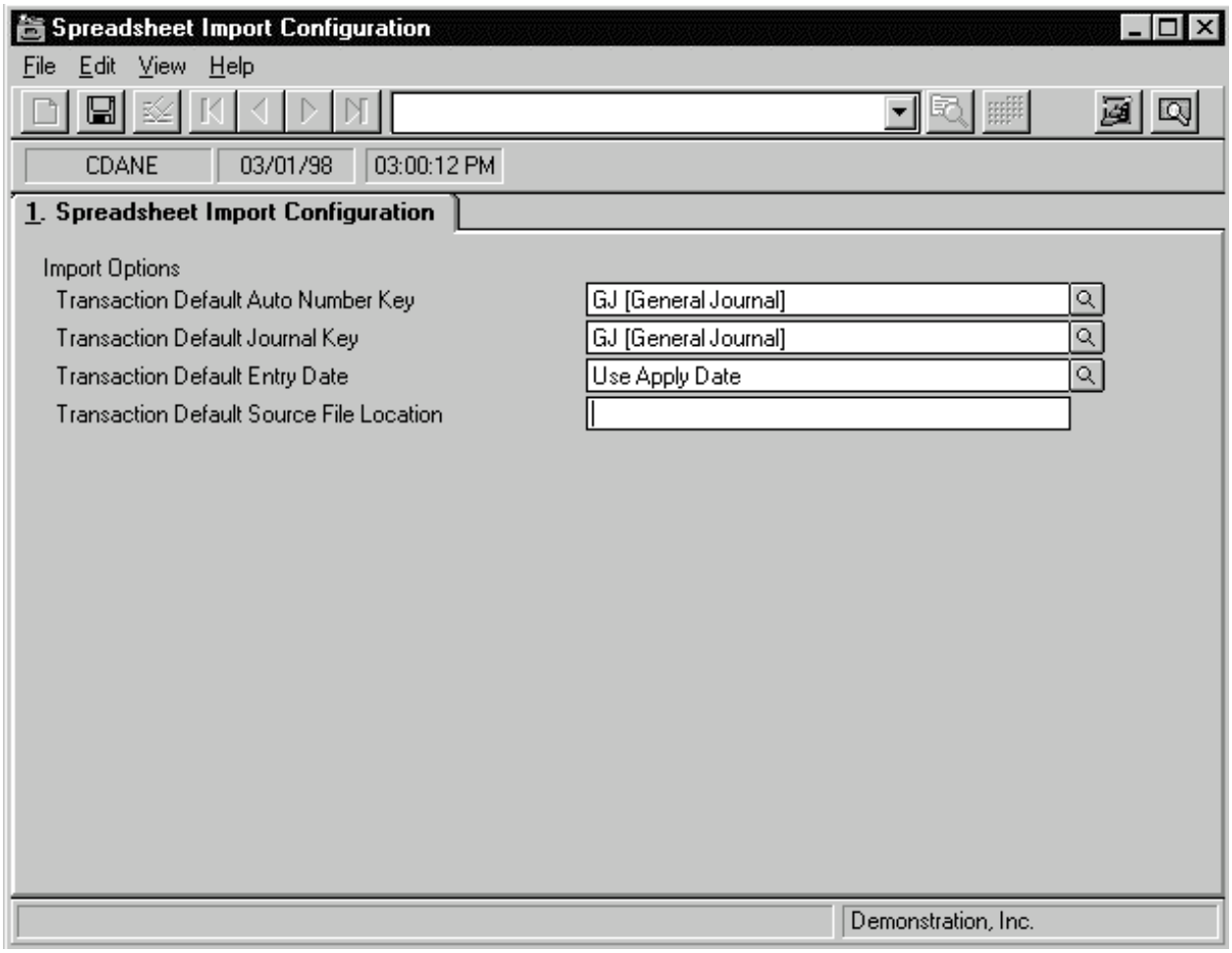
1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Platinum for Windows.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored. For best results, the path should be the Platinum\Post directory of the drive where the related Platinum Application Server (PAS) resides. Furthermore, the extension of the export/import file must be WKS, indicating a Lotus

spreadsheet file.

6. Click Save.

To set up Platinum

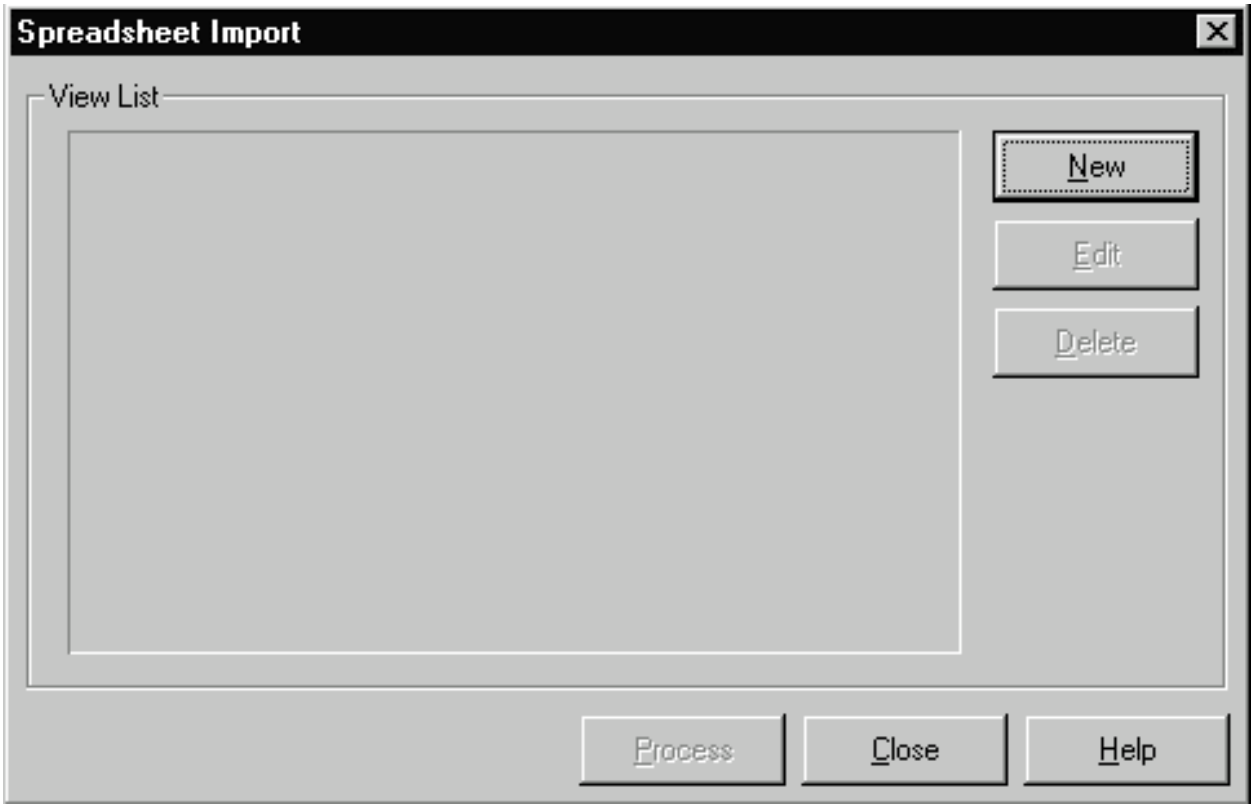
1. Select the Spreadsheet Import Configuration window from the GL menu browser.
2. Fill in the Import Options section (using the lookup button) as indicated below:
3. Transaction Default Auto Number Key: GJ (General Journal)
4. Transaction Default Journal Key: GJ (General Journal)
5. Transaction Default Entry Date: Use Apply Date
6. Click the Save (diskette) icon to finalize the import configuration settings.



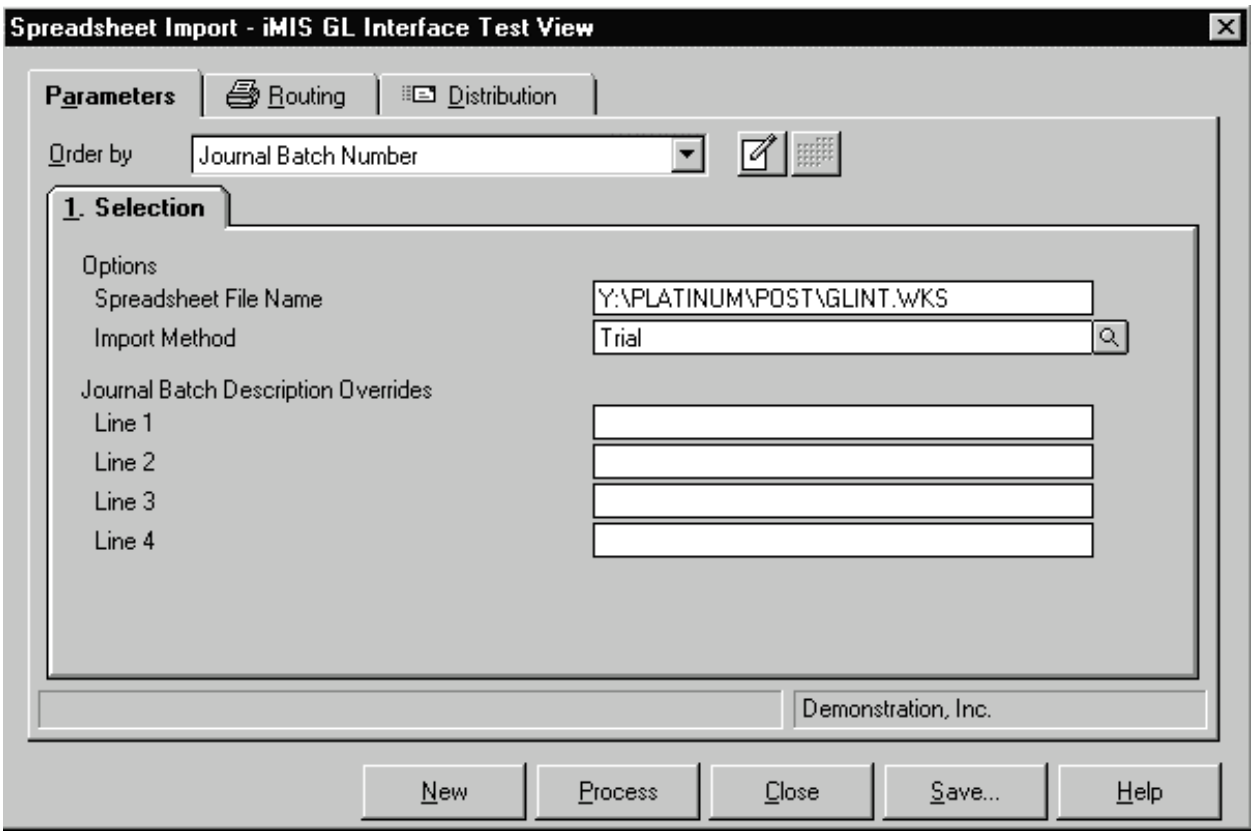
7. Continuing with the PFW setup, you may wish to set up 2 import views, one for testing the import data and process, and one for finalizing the import of the data.

   To set up the import test or trial view

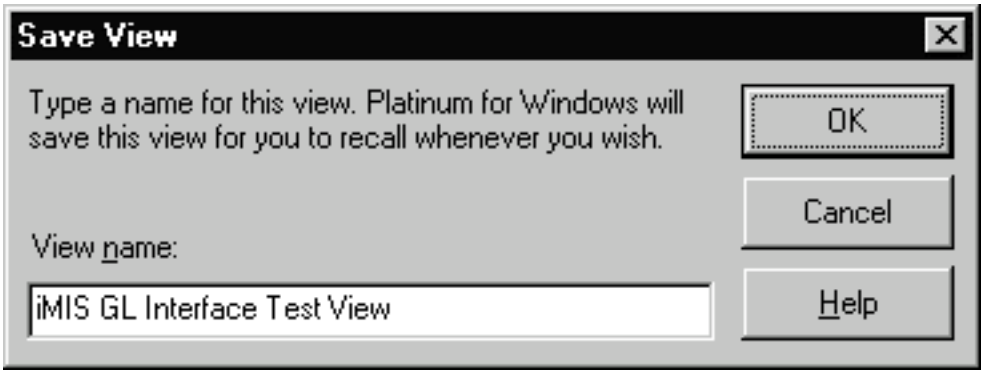
1. Select the Spreadsheet Import option from the GL menu browser.
2. In the View List window, select New.



3. On the Parameters tab, fill in the path/file name of the iMIS generated export/import file in the Spreadsheet File Name under options.
4. Select Trial as the Import Method.



5. Complete the Routing and Distribution tabs. Refer to the Platinum for Windows System Basics User's Guide for information about these tabs.
6. Click the Save button.
7. Assign a name to the view in the pop up box that appears and click OK.



8. Click the New button to begin the definition of the view to perform the final import procedure.

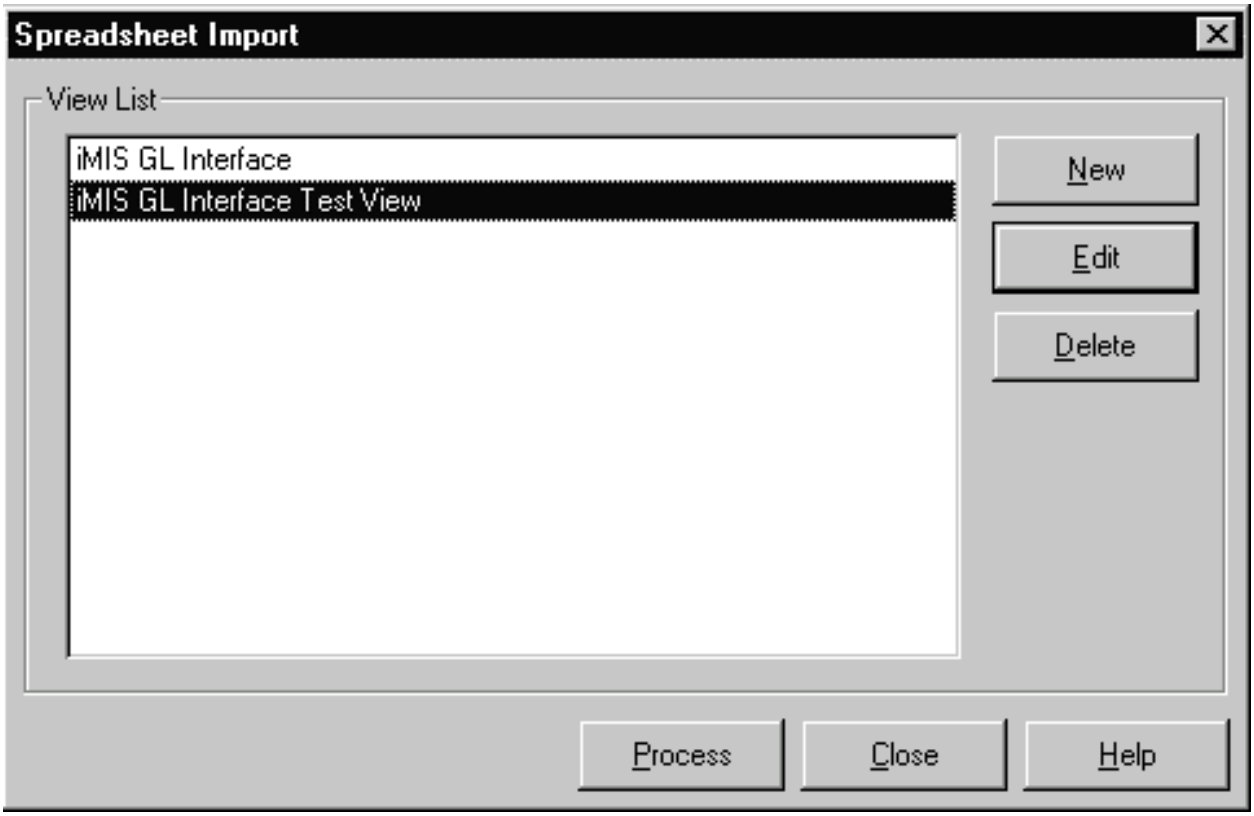
9. Repeat the steps outline for defining the Trial view (1 thru 7 above), except this time select Final as the Import Method in step 4.

To create the export file from iMIS (Platinum)

1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

To import data into Platinum

1. Select the Spreadsheet Import option from the GL menu browser.
2. In the View List window, highlight the Trial view if you wish to test the import data before finalizing the import.



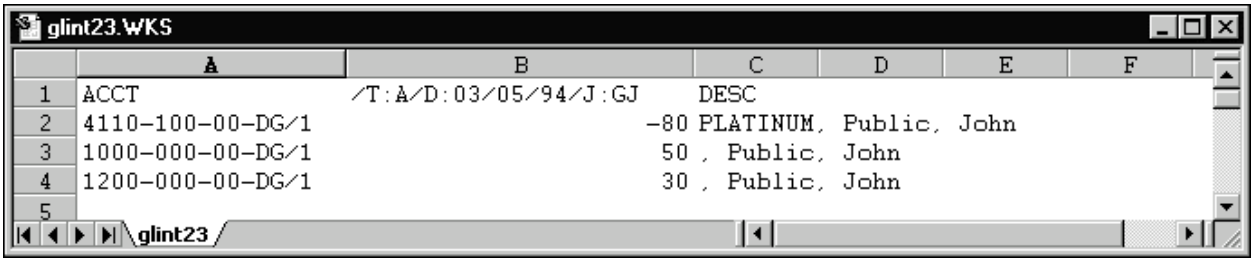
3. Click Edit and change the Spreadsheet File Name if the import file's path or name is different than the path/file originally defined in the view. Note that the file name should only be different if a unique, sequential number is appended to each newly created export/import file (i.e., if a? is imbedded in the Output file path/name name defined in iMIS).

4. Click Process to proceed with the trial run. A Spreadsheet Import Trial Report will print with the results of the test run.
5. To finalize the import procedure, highlight the View setup for the Final Import Method from the View List window.
6. Click Edit only if the Spreadsheet File Name needs to be changed (see step 3).
7. Click Process to proceed with the actual import of the journal transaction data. A Spreadsheet Import Final Report will print with the results of the import. This report will indicate the Journal Batch Number assigned to the set of iMIS transaction data.
8. You can continue normal General Ledger processing of the iMIS batch. To post the transactions, for example, print the Edit List and perform the Period Post.

   Export/Import File Example

   The export/import file is a simple Lotus spreadsheet file in which the first line contains required heading information, followed by multiple lines containing the journal transaction lines. The middle section of the heading contains the transaction date as well as the transaction type (A for Actual) and journal type (GJ for General Journal) indicators. The transaction line data includes the Account, Amount, and Description for each journal entry line.

   The following export/import example shows a small interface file for the date of March 4, 1994.



Platinum SQL

iMIS provided support to meet export requirements for Platinum SQL version 4.2 or greater. This support was in place in iMIS 4.10.

The iMIS to Platinum SQL Interface works through the Platinum SQL Import Manager. The Import Manager serves as the bridge to bring information from outside packages, such as iMIS, into the normal Platinum SQL files. The Import Manager provides the mechanism for bringing financial (accounts receivable/cash/income) data generated through iMIS into your Platinum SQL General Ledger.

To set up iMIS for Platinum SQL

The setup steps from iMIS include making appropriate choices on the AR/Cash General Ledger Interface window and an optional step to establish a PLATINUMSQL General/Lookup Validation Table.

Step 1 – Change the GL Interface Type

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Platinum SQL.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored. The path should point to the IMDATA directory of the drive where the related Platinum SQL Server (PAS) resides. Furthermore, the export/import file must be assigned the name “glintdet.tab”.
6. Click Save.

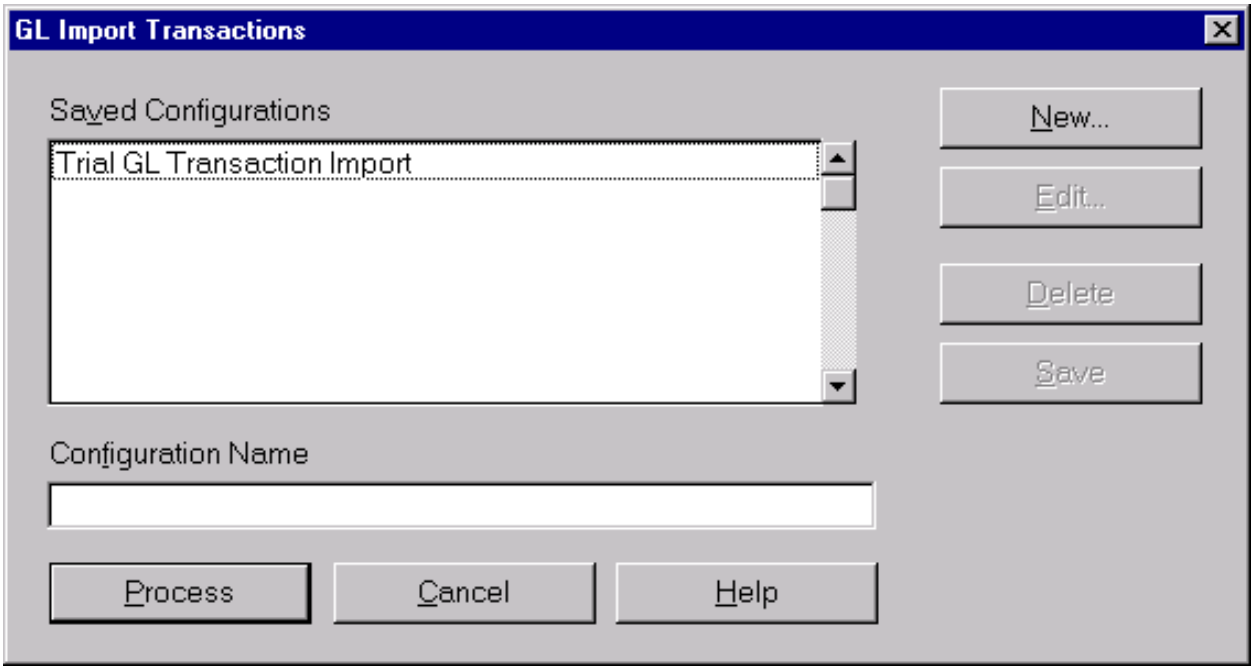
Step 2 – Set up a special PLATINUMSQL General Lookup/Validation Table

Create the Platinum lookup table. This step depends on whether you can use the iMIS default settings related to the Platinum company code and currency code. The default settings are to use the iMIS organization code for the Platinum company code and the literal “USD” for the currency code. If you need to use a different value for either the company code or the currency code, you must establish a PLATINUMSQL table and map the necessary codes to each iMIS organization code.

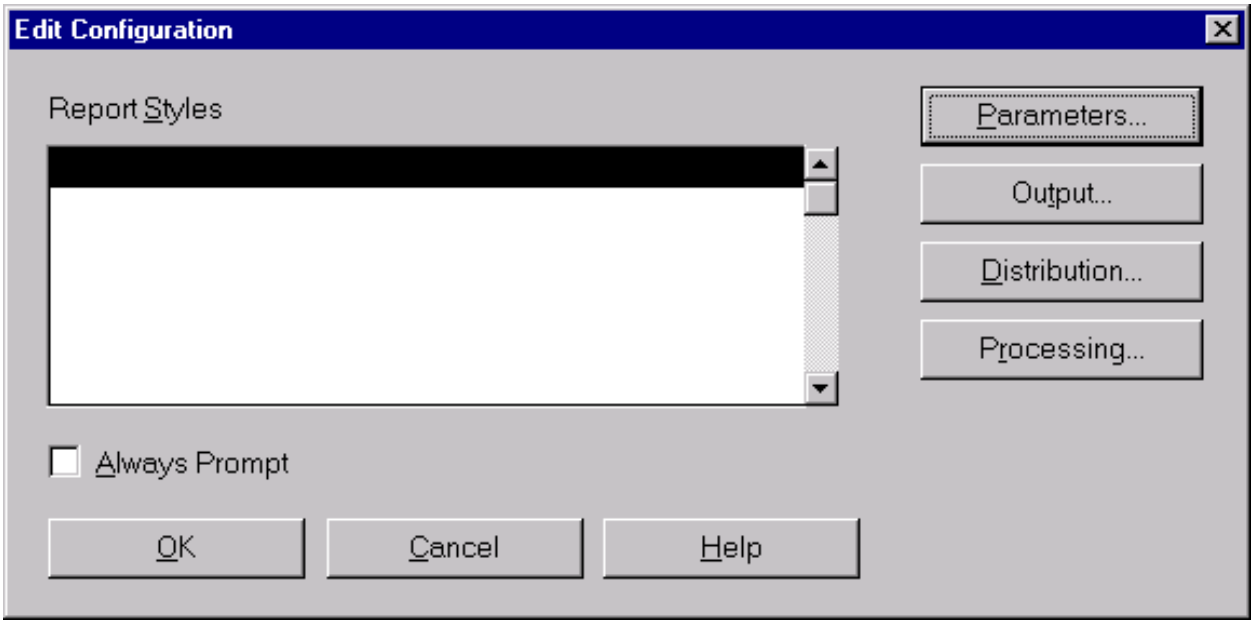
1. From Customers, select Set up tables > General lookup/validation to open the General lookup/validation window.
2. Select (New Table) from the list of table types. The New Table Type window opens.
3. Enter a New Table named PLATINUMSQL and click Save.
4. Insert a record for each iMIS organization code, filling in the organization code in the Code field.
5. Enter the appropriate Platinum company code in the Expansion field and the currency code in the Description field. Be sure to enter non-blank values for both fields.
6. Click Save.

To set up Platinum SQL

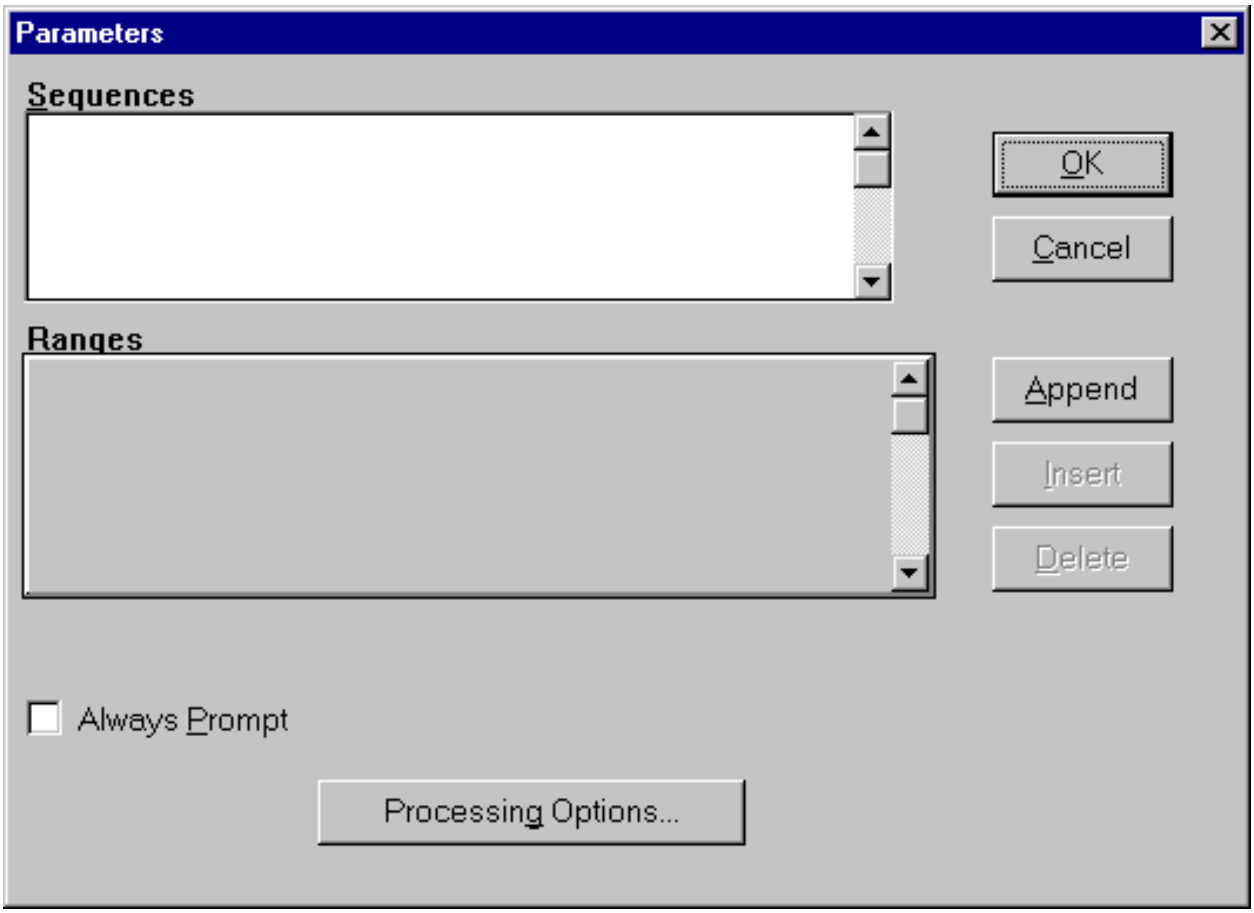
1. The setup within Platinum SQL includes simple steps to establish processing options for both the Trial and Final Import processes. These instructions are saved in Configuration files.
2. From System Manager, select Import > GL Import > GL Transactions from the System Manager menu bar to open the GL Import Transaction window.



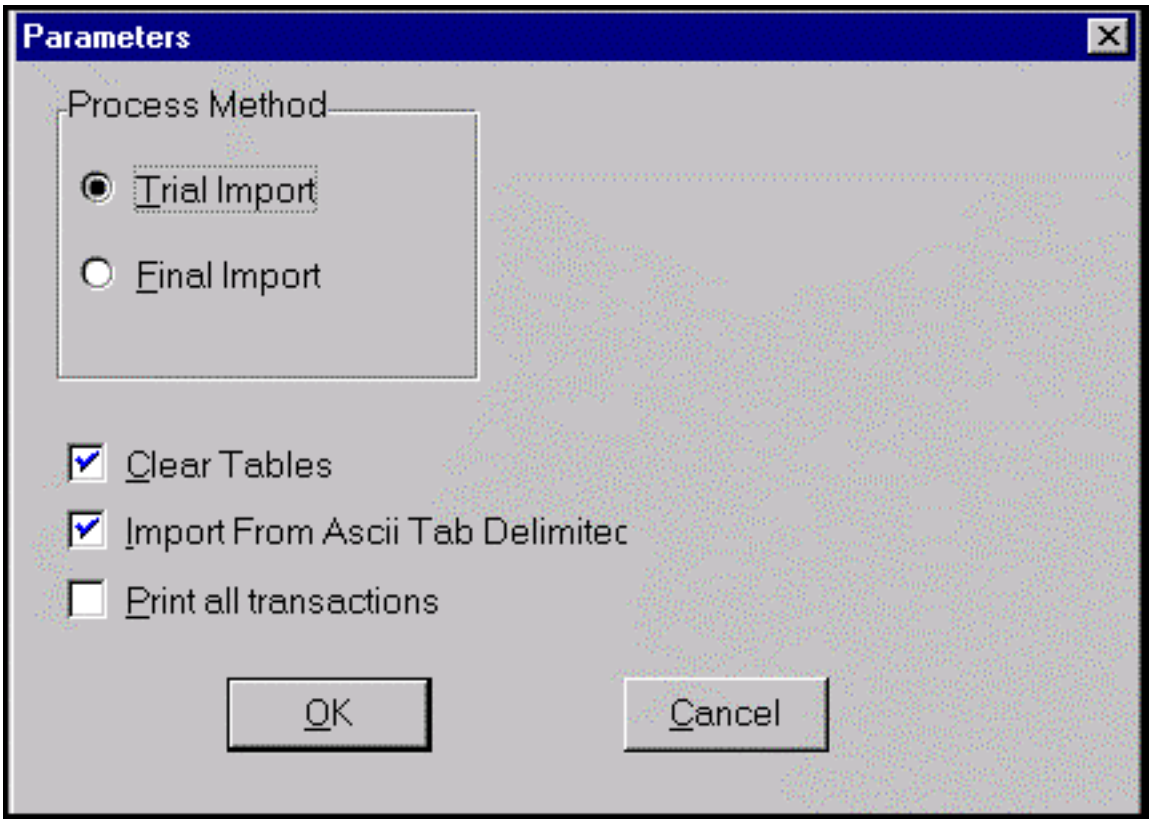
3. Click New to create the Import. An Edit Configuration window opens.
4. From the Edit Configuration window, click the Parameters button.



5. From the Parameters window, click the Processing Options window.



6. On the Options (Parameters) window, click the Processing Options button to open the Parameters window.



7. Set the Processing Method to Trial Import. This allows you to review the import report for errors prior to the final run.
8. Enable the Clear Tables and Import From Ascii Tab Delimited options.
9. Click OK.
10. Click OK to close the main Parameters window.
11. Optionally, click the Output, Distribution, and Processing buttons to change any default settings on those windows.
12. Click OK on the Edit Configuration window.
13. Enter an appropriate Configuration Name and click Save.
14. If you have a sample set of export/import files, click the Process button to test. Otherwise, click Cancel.

15. Repeat steps 1 through 9 to setup similar Configuration Instructions for the Final Import step. However, this time select the Final radio button within Processing Options in step 5.

To create the export file from iMIS (Platinum SQL)

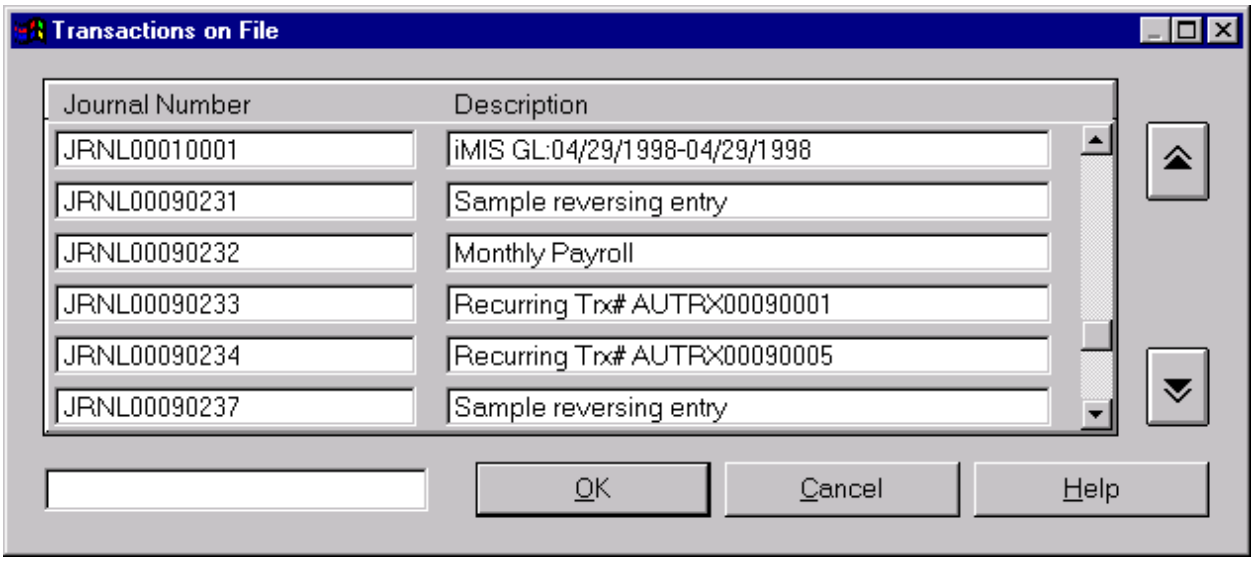
1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

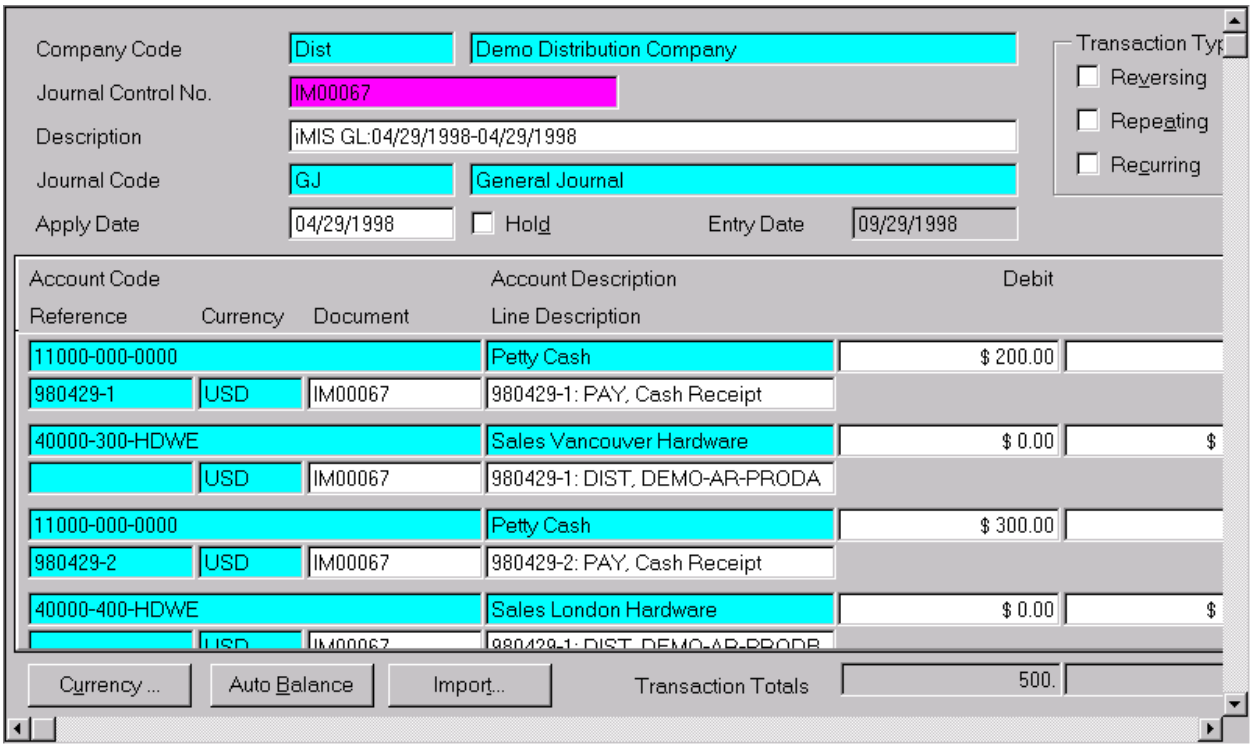
To import data into Platinum SQL

1. From System Manager, select Import > GL Import > GL Transactions from the System Manager menu bar to open the GL Import Transaction window.
2. Highlight the appropriate Trial Import Configuration Name on the list and click Process.
3. Once the import is complete, review the import report: report.out , which is located in the Winplt directory.
4. If there are no errors reported, repeat steps 1 and 2, choosing the Final Import Configuration in step 2.
5. If errors are recorded, analyze the results. In cases such as an incorrect or blank GL account, it may be easiest to correct the import file and repeat the process.

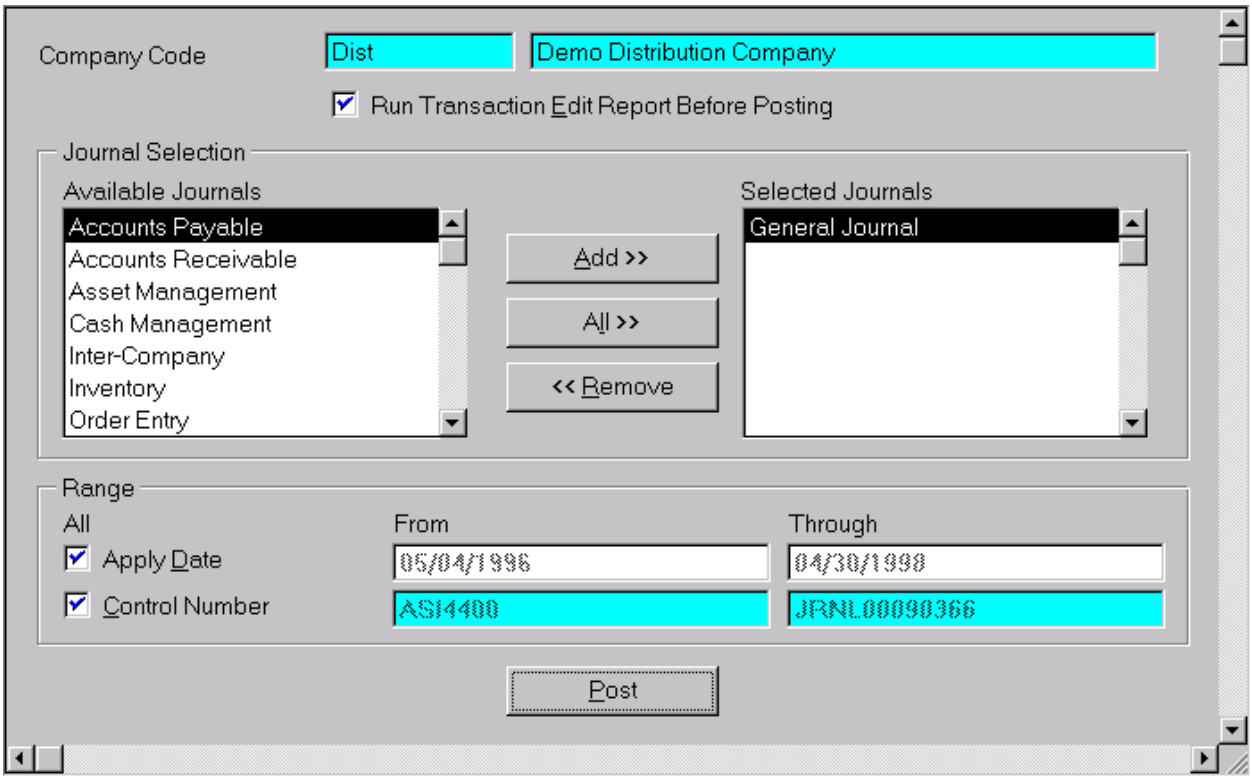
To view and post imported transactions

1. Select Applications > General Ledger.
2. View the transactions by choosing Processing > Standard Transactions > Transaction Entry.
3. Tab to the Journal Control No field and press Ctrl+Z. Double-click the line that contains the iMIS description.





4. To post the imported transaction, select Processing > Standard Transactions > Post Transactions.



5. Optionally, enable the Run Transaction Edit Report Before Posting option.
6. Click Post.

Export/Import File Example

The GL Interface process creates two tab-delimited files, a single line header file (GLINTHDR.TAB), and a multi-line detail file (GLINTDET.TAB). The header file contains the transaction date to be assigned to the journal entry. The begin date within the interface date range is used for this purpose. The detail file contains one line for each debit or credit entry.

Note: As you enter general ledger account numbers in iMIS, you can include dashes to separate the various components within the account structure (i.e., 11000-000-0000). All dashes will be dealt with properly and removed as required in the export data that is generated.

Import Header File Sample

GJ IM00067 iMIS GL:01/31/2011-
03/31/2011 05/31/2011 03/31/2011 0 0 0 0 0 Dist USD USD IM00067 -
0 05/31/2011

Import Data Sample

IM00067 1 Dist 110000000000 110331-1: PAY, Cash
Receipt IM00067 110331-1 110331-1 200.00 200.00 200.00 USD 1.0 1.0

IM00067 2 Dist 40000300HDWE 110331-1: DIST, DEMO-AR-
PRODA IM00067 110331-1 110331-1 -200.00 -200.00 -
200.00 USD 1.0 1.0

IM00067 3 Dist 110000000000 110331-2: PAY, Cash
Receipt IM00067 110331-2 110331-2 300.00 300.00 300.00 USD 1.0 1.0

IM00067 4 Dist 40000400HDWE 110331-1: DIST, DEMO-AR-
PRODB IM00067 110331-2 110331-2 -300.00 -300.00 -
300.00 USD 1.0 1.0

Sage Sterling

iMIS provided support to meet export requirements for Sage Sterling. This support was in place in iMIS LAN version 3.50b and in iMIS 4.10.

Minimal setup is required on the iMIS side to facilitate the interface. No setup steps are required with Sterling.

Within Sterling, there is a department designated by an integer no longer than 3 digits and a Nominal Account Reference, which is represented by a character string, no longer than 8 characters. You must construct the iMIS GL account by the department code, followed by a hyphen (-), followed by the account.

Example: 1-4000 in iMIS translates to Nominal Account Reference “4000” belonging to Department “1” in Sterling.

To set up iMIS for Sage Sterling

1. From AR/Cash, select Set up module, and click G/L Interface to open the AR/Cash General Ledger Interface window.
2. Click Edit.
3. From the GL interface type drop-down list, select Sage Sterling.

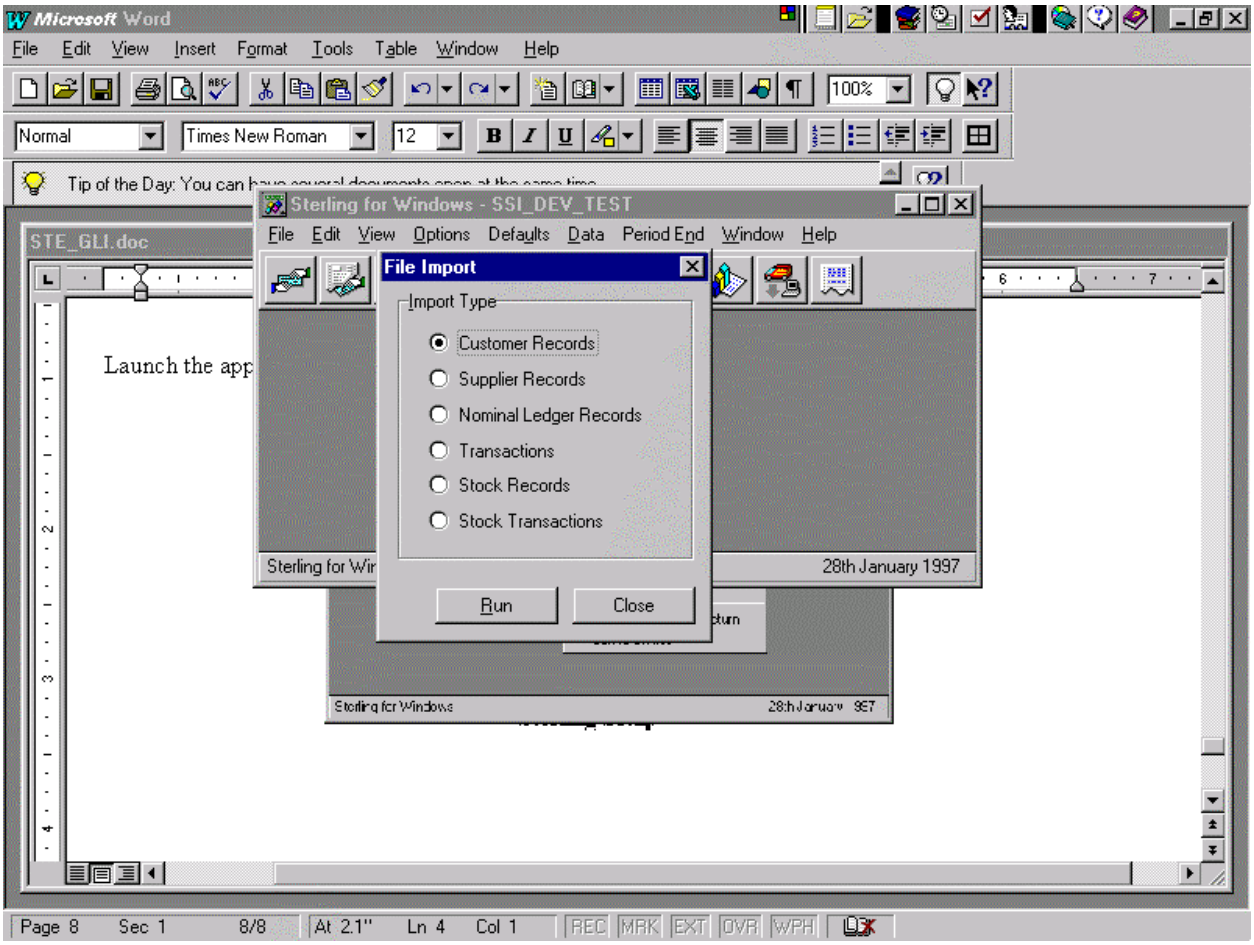
   Note: In LAN, select Sterling.
4. Select an option from the Summarize by drop-down list.
5. Enter the Output File Path/Name, which dictates how iMIS should name the export/import file and where it should be stored.
6. Click Save.

   To create the export file from iMIS (Sage Sterling)

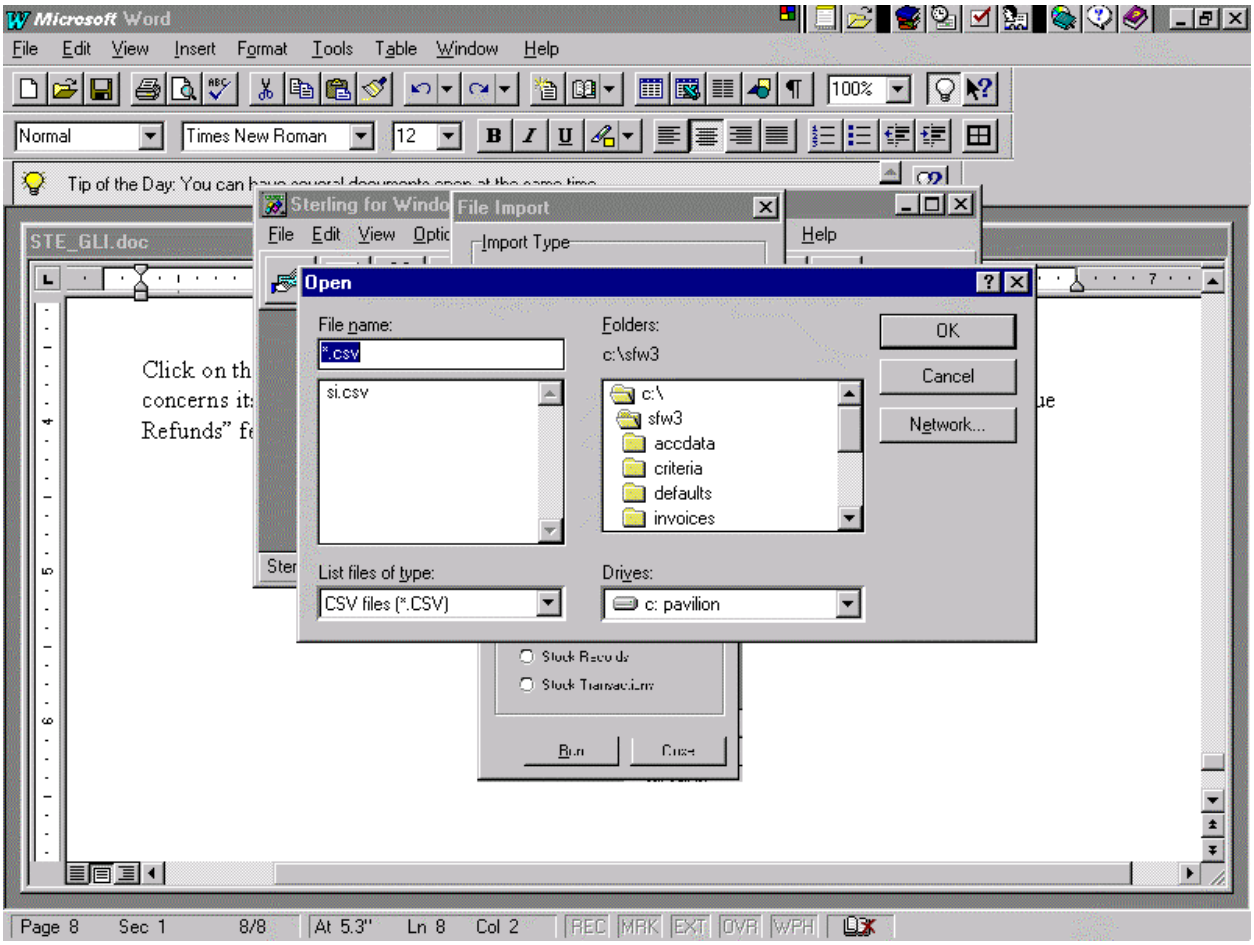
1. Generate the general ledger transaction export files using AR/Cash > Process month-end procedures > Create GL Journal.

   To import data into Sage Sterling

1. Launch the application and select Data > Import.
2. Click the Transactions radio button and click Run.



3. From the selection window that appears, locate and double-click the export/import file.



4. If Sterling detects a problem with the import file, it will post an error message detailing the problem line by line and will reject the import.

   Note: One common problem is that the Nominal Account number in Sterling does not match a GL number in iMIS.

   Import Header File Sample

   GJ ASI4000 Test GL
   Import 01/31/2011 04/30/2011 0 0 0 0 0 Dist IM0001 0 "

   Import Data Sample

   ASI4000 1 Dist 11000-000-0000 DIST-AR-
   PAY IM0001 IM00011 " 100.00 100.00 100.00 1.0 1.0

ASI4000 1 Dist 11010-000-0000 DIST-AR-PAY IM0001 IM00011 " -100.00 -100.00 -100.00 1.0 1.0

General lookup/validation tables

Creating general lookup/validation tables

iMIS enables you to create and add to validation and expansion tables for many fields of the iMIS interface. iMIS comes with built in links between many of the its standard fields, and you can create validation tables for any of your user-defined demographic or list-string fields.

Guidelines for populating tables

When working with lookup/validation and expansion tables, keep the following guidelines in mind:

- Do not use special characters in the Codes or Expansion fields when creating general lookup/validation tables.
- The Code field on the Set up general lookup/validation window can hold up to 60 characters. However, the general lookup/validation tables that are used for various fields in iMIS that have varying field length requirements. Before adding Code values to a general lookup/validation table, you should determine the maximum length of the field to which the general lookup/validation code is connected. If you add a Code that is longer than the field length requirement for the field to which it connects, the data will be truncated, or in the case of certain tables, the value will not be shown as an available option.
- If the length of the Code field for the following general lookup/validation tables is greater than the defined field length, the value will not display in the drop-down as an available option:
- CATEGORY
- MAIL_CODE
- MEMBER_STATUS

- SIC_CODE
- STATUS

  Note: Refer to the latest Alpha Table Layouts for field lengths.

- The value that is displayed in a drop down list or in a select window is determined in the following way:
- If a Description is defined, the Description is displayed.
- If no Description is defined, but an Expansion is defined, the Expansion is displayed.
- If neither a Description nor an Expansion are defined, the Code is displayed.
- The value that is saved after a user selects a value from a drop down list or select window is determined as follows:
- If the value in the general lookup/validation table has an Expansion value, the Expansion value is saved.
- If the value in the general lookup/validation table does not have an Expansion value, the Code value is saved.
- The Description value from the general lookup/validation table is never saved as the result of a selection from a drop down list.

  The value that is saved is the value that is displayed in the window that calls the drop down list or select window.

  The following are exceptions to the values that will display in a drop-down list:

- The SIC field on the Other tab will always display the Code field values defined in the SIC_CODE general lookup/validation table.

  Tables that provide validation

  The table validation feature enables you to assure that everyone within your organization uses the same codes to designate the same thing by either checking entered values

against a list of approved values (validation) or by providing a fixed list of values from which users must choose (lookup).

For example, the STATE_CODES table comes preloaded with state and regional two-character abbreviations, and iMIS rejects entries in the St/Prov field that fail to match those in the table. While you are entering or editing a field linked to a table, you can view a selection window of the available table values through the lookup feature.

Tables that provide expansion

Expansion tables provide input replacement for specified fields. With this keystroke-saving technique, the user enters an abbreviation for a field, and the table look-up replaces it with the associated replacement text. This feature is useful for fields that commonly contain the same text. For example, the Prefix field can expand abbreviations in data entry according to the PREFIX table: entering m expands to Mr., entering p in the Title field expands to President, entering vp expands to Vice President.

List string fields will only validate against a table if and when a general table is linked to the field. With a few fields, iMIS uses the table for expansion only (in which case the table associates abbreviations and expanded text) but does not restrict the text that users can enter. For example, the TITLE table expands vp to Vice President but it will not keep you from entering a new title that is not in the table, such as Sales Representative.

Tables that expand and validate

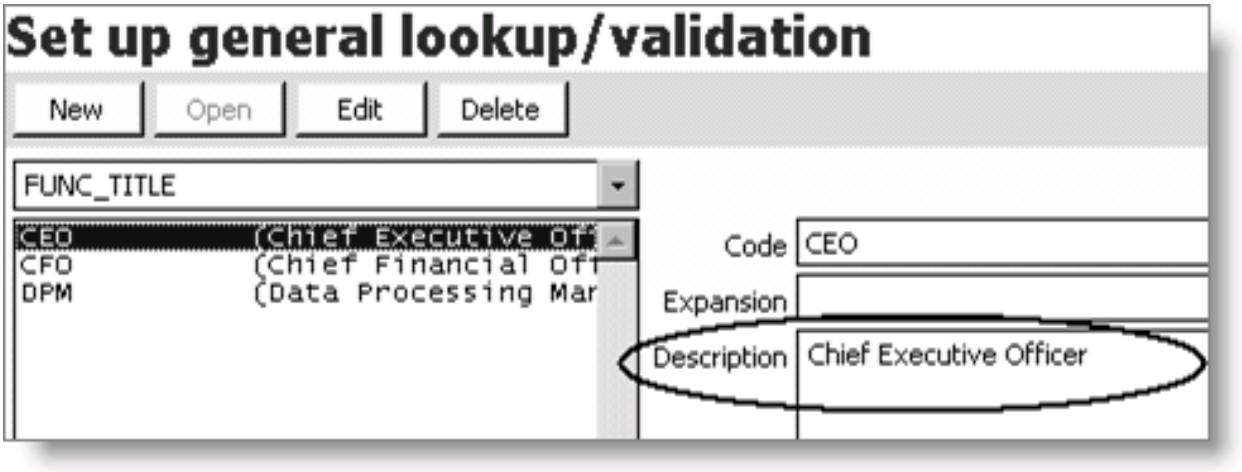
Some fields are set to use a table for both expansion and validation. For example, the PREFIX table provides abbreviated entries and restricts the text to one of the field values (or blank). When using combination tables, be sure to enter both the valid abbreviations and the full field values as codes so that both types of text entries will be accepted (validated).

When setting up tables on the Set up general lookup/validation window to provide lookup choices and validation during data entry for coded fields such as Prefix, you should enter values for Expansion or Description that are different from the specified Code to prevent duplicate values from displaying in your drop-down lists. For example, if you enter Dr. as the Code and Dr as the Expansion, you will have a duplicate in your list.

Note: Note: Leave the Expansion values blank for lookup/validation tables that you create unless you are sure that you need expansion. Entering expansion values when they are not necessary may cause problems with some lookup/validation fields in the iMIS interface.

Note: Note: Most lookup and validation fields limit input to values defined in their associated tables. Be sure to define all of the codes that your users will need when you set up lookup/validation tables.

Set up general lookup/validation window



From Customers, select Set up tables > General lookup/validation

New

This field creates a new value for the currently selected table.

To create a new table, scroll to the bottom of the table list and select New Table.

Tables

Displays a drop-down list of the lookup/validation tables established for your system. When you select a table, the code and description you have defined for the table display in the window below the drop-down list.

Code

Specifies the codes (up to 60 characters) for the lookup/validation tables you are defining for your system.

Expansion

Specifies the Expansion value that will be substituted for its Code.

Description

Specifies the description of the code you are defining for your system.

Print button

Used to generate and send a general lookup/validation table report to your report destination.

Import button

Used to import tab-delimited files into a general lookup/validation table.

To create a general lookup/validation table

When creating general lookup/validation tables, keep the tables as small as possible to optimize system performance on lookups.

The values or selections defined in a general lookup/validation table display in a drop-down list.

> **Note:** Note: In order for Prefix and Suffix data to show up in the Web view and Public view, the Expansion field must be populated. Otherwise, prefix and suffix information only displays in the iMIS Desktop view.

1. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Select New Table from the bottom of the drop-down table list.

   A window opens and prompts you for the new table name.
3. Enter the exact table name in the window.
4. Click Save to insert the new table into the table list.

5. Populate the new table:

1. Click New.
2. Enter a value in the Code field.
3. If you are creating an expansion table, enter a value in the Expansion field.

   Caution! When creating a general lookup/validation table, leave the Expansion field blank. Entering a value in the Expansion field of a lookup validation table can prevent iMIS fields tied to the table from working properly and may prevent iMIS from saving the correct data from fields populated by the table.
4. Enter a Description. The value entered in this field is displayed in lookup windows and drop down lists.
5. Click Save.
6. Repeat until you have entered all of the lookup/validation values.

To import files into a general lookup/validation table

iMIS allows you to import tab delimited files into a general lookup/validation table. The import process requires that the file be tab delimited and contain a Code, Expansion, and Description.

1. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Select New Table from the bottom of the drop-down table list. A window opens and prompts you for the name of the new table.
3. Enter the name of the new table in the window that displays.
4. Click Save.
5. Select Import to display the Importing Tab Delimited Tables... window.
6. Click Continue to display the Select import file window.

7. Navigate to your import file, and click Open.
8. When the import is complete, a dialog box will prompt you to select an additional file.

- Click No to end the import process.
- Click Yes to import another tab delimited file.

9. When complete, the Set up general lookup/validation window is displayed.

To delete a general lookup/validation table

> **Note:** Note: A general lookup/validation table is automatically deleted when no codes exist for the table. Follow the steps outlined below to delete each code you have defined for the table you wish to delete.

1. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Select the table to be deleted from the table name list. The table's code, expansion, and description values are displayed in their respective fields.
3. Delete all of the codes from the table:

1. Select a Code to delete.
2. Click Delete. A system message prompts you to verify the deletion of the selected record.
3. Click Yes.
4. Repeat until you have deleted all codes from the table.

Reference to general lookup/validation tables

For this reference to the general lookup/validation tables that are used in iMIS, the heading is the name of the table as it appears in the Set up general lookup/validation window, followed by indication of the table's purpose (data validation, expansion, or lookup only) and whether the table is required.

Table reference guide

- Required - Indicates that a value must be entered. Click the Lookup icon to select a value.
- Validation - Indicates that iMIS validates the data entered against the entries in the table. "Lookup" indicates that no validation is performed.
- Module - The name of the iMIS module that uses the table.
- Display field- The fields in the iMIS window where you can select from a value in the table.
- iMIS table - The specific iMIS table and column(s) whose contents are affected by the general lookup/validation table.

ACCESS_KEYWORDS (Validation)

Users must have a Customers Authorization level of 8 or higher to access this table. There is one predefined access keyword: HIDDEN. Assigning HIDDEN and another access keyword will hide a designated customized window. See Limiting User Access for more information.

Customers

Customer Setup – Access Keys (from Customers, select Set up module > General, Access Keys)	Name Financials Edit	System_Params: .Member_Control.NameFinKeys
	Name Addresses Edit	.Member_Control.NameAddressKeys
	Name Status Edit	.Member_Control.NameStatusKeys
	Import Activities	.Member_Control.ActivityImporterKeys
	Name Internet Security Data	.Member_Control.NameWebSecurityKeys

	Fundraising History View	.Member_Control.FRHistoryKeys
Set up activity types (from Customers, select Set up module > Activity types)	Keywords	Product_Type.ACCESS_KEYWORDS
Window Designer (from Customers, select Set up module > General, click Additional Windows, Define Windows)	Access Keywords	UD_WindowHeader.ACCESS_KEYWORDS

System Setup

Location	Display field	iMIS table
Users window (System Setup)	Access Keywords	Users.ACCESSKEYWORDS

ADDRESS_PURPOSE (Validation)

ADDRESS_PURPOSE enables you to have an unlimited number of addresses per customer. It includes address purposes that will be used in tracking multiple addresses. The three primary address tabs on the Manage customers window are reserved for the address types defined in Customer Setup - Address and Notes window. When the ADDRESS_PURPOSE table is created with at least one value defined, a New address tab is added to the Manage customers window (see “Customer data entry”).

> **Note:** Note: In iPart-based sites, you can create more than one address with the same custom purpose (defined in the ADDRESS_PURPOSE table), but multiples are not allowed for the standard purposes (defined in Customer Setup > Address and Notes). In the Public view and the Web view (non-iPart based sites), users will only be able to add or edit one address per ADDRESS_PURPOSE type.

1. Create the ADDRESS_PURPOSE table.
2. Enter one or more address purpose codes in the table.
3. Log out of iMIS.

Customers

Address tab (from Customers, select Manage customers, enter/edit record, and select Address tab)	Purpose	Name_ Address.PURPOSE

APPEAL_TYPE (Validation)

Appeal Types help to identify the kind of appeals used in fundraising activities.

Customers

Set up appeals (from Fundraising, select Set up tables > Appeals)	Appeal Type	Appeal.APPEAL_ TYPE

BAD_ADDRESS (Validation)

Used to indicate that an address is invalid and should not be used as mailing destination for reports. When reports are printed, a checkbox allows you to choose to include/exclude records with bad addresses.

Customers

Manage customers (from Customers, select Manage customers, enter/edit record, and select Address tab)	Bad Address	Name_ Address.BAD_ ADDRESS

BAD_ADDRESS enables you to mark address that do not pass validation with codes such as “moved”, “no_such_addr”, and so on. You can specify an address as bad (invalid) and include or exclude those customer records when generating Exports, Labels, and Letters (using the Word Integration Letter System) by selecting a bad address status from the Status drop-down list on the Address tab of the Manage customers window to associate with the customer’s address.

The values listed in the Status drop-down list are defined in the BAD_ADDRESS general lookup/validation table. If the table is not defined or there are no values specified, no values display in the drop-down list.

> **Note:** Note: The Status field accepts up to ten characters. Code or Expansion values defined for the BAD_ADDRESS general lookup/validation table that exceed ten characters will not display in the Status drop-down list. If the Description value exceeds ten characters, the value will display in the Status field but may display truncated (shortened), assuming the Code or Expansion associated with the Description does not exceed ten characters.

> **Note:** Note: To generate a report that includes or excludes addresses that have been marked with a bad address status, modify the report specification to include the Include Bad Addr option on the appropriate Selection window.

About company flowdown

If automatic flowdown of company address information is enabled on the Customer Setup – Advanced window, marking a company address as invalid will mark that address as invalid for all associated individual records with the following limitations:

- Only the data that appears in the Main address tab (the tab in the first position) for the company record will flow down to the address fields for associated individual records.
- Flowdown only occurs if the address for the individual record exactly matches the address for the company record.

BADGE_TYPES (Validation)

Exposition Management comes with two badge types predefined: FREE_PASS and PAID_PASS. Free passes are those that come with the purchase of the booth. A paid pass is a specific product defined at the exposition product level so you can purchase additional badges beyond the free passes.

Events, Exposition

Badges (from Events, select Register a customer, enter/edit record, select Badges tab OR from Exposition, select Process booth orders, enter/edit record, click Options> Badges)	Type	Order_ Badge.BADGE_ TYPE

CATEGORY (Validation)

The Category field must be enabled in Customers System Setup before it can be viewed/used on the Manage customers window.

Note: When entering a new value to the CATEGORY validation table, the CODE field must be 5 characters or less; otherwise, it will not display in the Category drop-down list under Customers.

Customers

Manage customers (from Customers, select Manage customers)	Category	Name.CATEGORY

CEU_TYPE (Required Validation)

Lists the continuing education units (CEU) type codes used for validation and lookup of CEU credit entries if you are not licensed for the Certification module.

If you are licensed for Certification, lookup and validation of CEU Type fields are performed against CEU type codes that are defined in Certification. If this CEU_TYPE table is also populated with CEU type codes, then the codes from both sources are combined and listed alphabetically when you click the CEU Type field's Lookup icon.

Note: Note: If an identical CEU type code exists both in Certification and in the CEU_TYPE table, the code from Certification is used.

Events

Event Function Definition - CEU window (from Events, select Define an event, double-click an event, double-click an event function, click More, and select CEU)	CEU Type	Product_Function.CEU_TYPE

COMMITTEE_GROUP (Validation)

Committees

Set up committee codes (from Customers, select Set up tables > Committee codes)	Group	Product.Product_Code

To create the Committee Group general lookup/validation table

You can define committee groups to collectively organize your committees. For large associations that may have hundreds of committees, this feature allows you to group committees for easier access, maintenance, and modification.

Committee codes are tagged with a committee group on the Set up committee codes window. The Manage committees window can view all committees or committees that have been assigned to a specific group.

COMMITTEE_STS (Required Validation)

Committee Management comes with two predefined codes: A and I. These codes allow for better committee management. ‘A’ indicates that a committee is of an active status. ‘I’ indicates that a committee is of an inactive status and will display the description on the Committee Roster window. A warning message will also appear in the Set up committee codes window when changing the status from A to I.

<tCommittee>

Set up committee codes (from <Cust>, select Set up tables	Status	Product.GROUP_

> Committee codes)	3

CONFLICT_CODE (Validation)

Used to determine conflicts based on date/time or content within events at the time of registration. Registering for conflicting event functions will yield a warning message.

Events

Event Function Detail (from Events, select Define an event, enter/edit event, and edit/insert function)	Conflict Code	Product_Function.CONFLICT_CODE

CONTACT_TYPE (Validation)

Exposition Management comes with one predefined code: PRIMARY.

Exposition

Exhibitor Contacts (from Exposition, select View exhibitor information, double-click company, and click More > Contact Maintenance)	Assign Contact Type to selected contact	Exhb_Meet_Contact.CONT_TITLE

COUNTRY (Validation, Expansion)

The COUNTRY table is a combination validation/expansion table for the Country field used in customer addresses. You need to specify values, either abbreviations for expansion tables and/or full country names, for all the countries in which your customers may reside.

DESIGNATION (Expansion only)

Customers

Manage customers (from Customers, select Manage customers)	Desig	Name.DESIGNATION

EXPENSE_TYPE (Validation, Expansion)

Used to help identify the kind of expenses associated with your fundraising appeals (such as Postage and Rent).

Fundraising

Set up appeal expenses (from Fundraising, select Set up appeal expenses)	Expense Type	Expenseitem.EXPENSE_TYPE

EXPO_CAT (Validation)

User defined types depending on the type of expositions you conduct. The values in this table must be entered in Description in order to view them through Exposition.

Exposition

Expo Options (from Exposition, select Set up an exposition, select an exposition, enter/edit exposition, and click More > Options)	Historical Category	Exhb_Setup.HIST_CODE

EXPO_PROD_CAT (Validation)

Defines exposition product categories to use for grouping exposition product codes.

Exposition

Product Master File Maintenance (from Exposition, select Set up tables > Product master list)	Product Category(s)	Exhb_Prod_Mast.PROD_CAT

FUNC_TITLE (Validation)

10.5 and later - Added to Relationship tab. The Functional Title field must be enabled in Customer System Setup before it can be viewed or used on the Manage customers window. Used for additional member tracking and reporting.

Customers

Manage customers (from Customers, select Manage customers)	Func Title	Name.FUNCTIONAL_TITLE
Relationship Detail window (from Customers, select Manage Customers, select Relationships tab, click New)	Functional Title	Relationship.FUNCTIONAL_TITLE

FUNDRAISER_TYPE (Validation)

10.4 and later - Used to indicate the type of fundraiser. Helpful in differentiating between types of soft credits when using the multiple soft credit feature.

Fundraising

Soft Credit tab (from Fundraising, enter/edit a gift, and select Soft Credit tab)	Type	Trans_SoftCredit

GIFT_AMOUNT (Lookup only)

By default, the Donation Creator iPart displays a single, empty Gift Amount field. However, you also have the option to display an array of gift amounts from which the user

can select, or to display a single Gift Amount field that is pre-populated with a gift amount of your choice. You set these options through the GIFT_AMOUNT table and can customize the Gift Amount display for any iMIS distribution code. For more information about using the Donation Creator, see iParts for donation features.

Fundraising

Donation Creator iPart Gift Amount	Activity.AMOUNT Trans.AMOUNT

To display a gift array or a pre-populated gift amount in the Donation Creator iPart

1. From iMIS Desktop, go to Customers > Set up tables > General lookup/validation.
2. If a GIFT_AMOUNT table does not already exist, select New Table to create it.
3. Select the GIFT_AMOUNT table from the list and click New.
4. In the Code field, enter the distribution code for which you want to customize the display. For example, BLDG.
5. The values you enter in the Description field determine what is displayed on the donation webpage:

- To display an array of gift amounts, enter a comma-separated list of gift values that you want to appear in the list. For example, entering 50,100,200,500 results in a radio list of those values displayed on the page. To preselect an option, precede the number with an asterisk: 15,*25,75.

  Note: The gift array always displays an option for the user to select Other and enter any amount.

- To display a single Gift Amount field with a pre-populated gift amount, enter a single amount. For example, 25.

6. Save.

GL_ACCOUNT (Validation)

If the Validate G/L Accounts is enabled in AR/Cash System Setup G/L Interface, then the table will be used to validate accounting codes. If this is not enabled, you may enter codes that are not in the table.

AR/Cash

Set up cash accounts (from AR/Cash, select Set up tables > Cash accounts)	Account	Cash_Accounts.GL_ACCOUNT

Billing

Set up product codes (from Billing, select Set up mod-ule> Products)	G/L Acct	Product.INCOME_ACCOUNT

Certification

Set up components (from Certification, select Set up components)	Income Account	Product.INCOME_ACCOUNT

Events

Event Function Definition - Fees (from Events, select Define an event, select/insert event, edit/insert function, and click More> Fees)	Income Account	Product.INCOME_ACCOUNT

Exposition

Exhibition Booth & Product Fees (from Exposition, select Set up an exposition, double-click an exposition, insert/edit function, and click More> Fees)	Income Account	Product.INCOME_ACCOUNT

Fundraising

Set up distributions and Premiums (from Fundraising, select Set up tables > Distributions and premiums)	Income Account	Product.INCOME_ACCOUNT

Orders

Inventory System Setup (from Orders, select Set up module, and click Inventory)	Default Accounts	Order_Control.INCOME_ACCOUNT
Set up product categories (from Orders, select Set up tables > Product categories)	Default Accounts	Product_Cat.INCOME_ACCOUNT
Accounting (from Orders, select Manage inventory> Manage products, enter/edit product, and click Accounting)	Income Account	Product.INCOME_ACCOUNT

GROUP_CODE (Validation)

Used to define relationship groups.

Customers

Relationship Detail Window (from Customers, select	Group	Relationship.GROUP_

Manage customers, select Relationships tab, click New)	Code	CODE

To create the GROUP_CODE general lookup/validation table

1. Create a general lookup/validation table (see "To create a general lookup/validation table") named GROUP_CODE.
2. Select New.
3. Enter ROLE in the Code field.
4. (optional) Enter a brief Description.
5. Click Save.

HOLD_CODES (Lookup only)

Orders

Order Entry General Information (from Orders, select Enter and edit orders, enter record, and click General)	Hold Code	Orders.HOLD_CODE

LOCATION (Lookup only)

Used to store warehouse locations in versions prior to 10.3; replaced by the Product_Location table.

Orders

Product Detail (from Orders, select Enter and edit orders, enter record, select Overview tab, and double-click a line item)	Warehouse	Orders.LOCATION

MAIL_CODE (Lookup only)

The Use Mail Code option must be enabled in Customers System Setup before it can be viewed/used on the Manage customers window. Used to identify and sort mail.

Customers

Manage customers (from Customers, select Manage customers)	Mail Code	Name.MAIL_CODE

MEETING_TYPE (Lookup only)

Used to distinguish between types of events.

Events

Event Definition (from Events, select Define and event, and enter/edit event)	Type	Meet_Master-.MEETING_TYPE

MEM_TRIB_RELATIONSHIP (Validation)

Includes memorial/tribute relationships that are used to help identify and maintain fundraising notifications (son of, mother of, etc.).

Fundraising

Notification tab (from Customers, select Manage customers, and select Notification tab)	Relationship	Name_Notify.RELATIONSHIP

MEMBER_STATUS (Required Validation)

10.5 and later – Added to Relationship tab. If the status code is left blank, the record will not be included in dues & subscription product billing runs. Status codes other than A, I, S and D will be ignored for dues & subscription product billing runs.

Customers

Manage customers (from Customers, select Manage customers)	Status	Name.STATUS
Relationship Detail window (from Customers, select Manage Customers, select Relationships tab, click New)	Status	Relationship.STATUS

MERGE_CODE (Validation)

Used to help identify the body of the letter for each gift/pledge acknowledgement.

Fundraising

Notification tab (from Customers, select Manage customers, and select Notification tab)	Merge Code	Name_Notify.MERGE_CODE
Acknowledgement Info (from Fundraising, select Enter and edit gifts, enter/edit a gift, and click Acknowledge)	Merge Code	Trans.MERGE_CODE

NOTE_PURPOSE (Validation)

Used to track note purposes beyond the three that are defined in Customers System Setup.

Customers

Notes tab (from Customers, select Manage customers, and select Notes tab)	Purpose	Name_Note.PURPOSE

PREFIX (Validation)

Titles or abbreviated titles that will be used before the contact's formal name (such as Mr., Ms., Dr.).

> **Note:** Note: A value that you enter in the PREFIX general lookup table can also be made to appear in the Name.FULL_NAME field of customer records if you add the value to the Prefixes in Full Name field in the Customer Setup - Basic Options window (Customers > Set up module > General, then click Basic Options).

Customers

Manage customers (from Customers, select Manage customers)	Prefix	Name.PREFIX

Events

Attendee (from Events, select Register a customer, enter/edit record, and select Attendee tab)	Prefix	Orders.PREFIX Order_ Badge.PREFIX

Exposition

Expo Registration - Name/Address (from Exposition, select Process booth orders, enter/edit record, and click Options> Address)	Prefix	Orders.PREFIX

Orders

Order Entry - Name/Address (from Orders, select Enter and edit orders, enter record, and click Address)	Prefix	Orders.PREFIX

REFERRAL_AREA (Validation)

Entries in table validate against Ref_Provider.ZIP field. Multiple zip codes can make up an area.

Referrals

Manage referrals (from Referrals, select Manage referrals)	Zip	Ref_Provider.ZIP

REQUEST_STATUS (Validation)

10.3 and later - Used to indicate the status of a request. Default status values: Active and Inactive.

Fundraising

Request Entry (from Fundraising, select Manage requests)	Status	Activity.Status_Code

REQUEST_TYPE (Validation)

Used to help identify the kind of requests used in fundraising activities. The activity where this resides is REQUEST.

Fundraising

Request Entry (from Fundraising, select Manage requests)	Request Type	Activity.UF_2

SALUTATION_CODE (Validation)

Used to help identify and track multiple customized salutations for gift/pledge acknowledgements and also in Customers.

iMIS allows you to create salutation codes that add salutation text to customer records. The assigned text is used for customizing acknowledgements for gifts, pledges, and letters. Before you can assign salutation codes to customers, you need to set up the Salutation Code table and enter the salutation codes and descriptions.

> **Note:** Note: If the Upper/Lower option is enabled in the System Setup window, then all values entered in the Salutation field convert automatically to upper/lowercase. If the Upper/Lower option is disabled, then the text is saved as it is entered.

Customers

Salutations (from Customers, select Manage customers, and select Salutations tab)	Salutation Code	Name_Salutation.SALUTATION_TYPE

Fundraising

Notification (from Customers, select Manage customers, and select Notification tab)	Salutation Code	Name_Notify.SALUTATION_CODE
Acknowledgement Info (from Fundraising, select Enter and edit gifts, enter record, and click Acknowledge)	Salutation Code	Trans.SALUTATION_CODE

Display Name Editor iPart

The iPart can be added to any con-	Field label is con-	Name_Saluta-

tent record	figurable	tion.SALUTATION_TYPE

SHIP_METHOD (Required Validation)

Used to specify the shipping method for a particular order.

Orders

Set up freight (from Orders, select Set up tables > Freight)	Shipping Method	Freight_Rate.SHIP_METHOD

SIC_CODE (Validation)

Used to define Standard Industry Code (SIC) that apply to businesses.

Customers

Other (from Customers, select Manage customers, and select Other tab)	SIC	Name.SIC_CODE

SOURCE_CODE (Validation)

Used to specify the marketing program or contact type that generated this accounting transaction. Customers System Setup gives you the option of requiring a source code throughout the system.

AR/Cash

Order Entry (from AR/Cash, select Enter and edit orders, and enter/edit record)	Source	Activity.SOURCE_CODE Invoice.SOURCE_CODE

		Trans.SOURCE_CODE
Billing, Customers		
Dues/Subscription Payment by Individual (from Billing, select Enter and edit payments OR from Customers, select Manage customers, find a record, select Billing tab, and click Payments)	Source Code	Activity.SOURCE_CODE Invoice.SOURCE_CODE Subscription.SOURCE_CODE
Events, Exhibition		
Payments (from Events, select Register a customer, enter-/edit record, and select Payments tab, OR from Exhibition, select Process orders, select Payments tab)	Source Code	Orders.SOURCE_CODE Trans.SOURCE_CODE
Exposition		
Payment (from Exposition, select Process booth orders, enter/edit record, and click Payment)	Source Code	Orders.SOURCE_CODE Invoice.SOURCE_CODE

		Trans.SOURCE_CODE
Fundraising		
• Set up Tables (from Fundraising, select Set up Tables select Appeals)	Appeal	Invoice.SOURCE_CODE
• Distributions and Premiums (from Fundraising, select Set up Tables, select Distributions and Premiums)		Trans.SOURCE_CODE
• Enter and Edit Gifts (from Fundraising, select Enter and Edit Gifts)		Activity.SOURCE_CODE
Orders		
Enter and edit orders (from Orders, select Enter and edit orders, and enter/edit record)	Source	Invoice.SOURCE_CODE
		Orders.SOURCE_CODE
		Trans.SOURCE_CODE
		Activity.SOURCE_CODE

SR_AREA (Validation)

Service Central

Service - Request (from Issues, select View and enter issues, and enter/edit record)	Area	Service_ Request.AREA

SR_CAT (Validation)

Service Central

Service - Request (from Issues, select View and enter issues, and enter/edit record)	Category	Service_ Request.CATEGORY

SR_ENVIRON (Validation)

Service Central

Service - Request (from Issues, select View and enter issues, and enter/edit record)	Environment	Service_ Request.ENVIRONMENT

SR_CATLEVEL (Validation)

Designates a category that spans across other categories. For example, you might have categories that align with product types, such as books, t-shirts, and desk accessories, but customers might inquire about the availability of these items in other languages. These inquiries might all receive an additional categorization such as "Language".

Values must be 20 characters or less.

Note: Note: Do not define Expansion values in this validation table. Expansion values will not be saved when creating new issues and will also prevent the appropriate codes from being saved in issues.

Service Central

Resolution window (from Issues, select View and enter issues, open an issue, click Edit, and click Resolution)	Category Level	Service_Request.CATEGORYLEVEL

SR_CNTTYPE (Validation)

Designates what kind of follow-up contact is necessary for an issue, for example, "onsite" or "callback".

Must be eight characters or fewer.

Service Central

Issue window (from Issues, select View and enter issues, and open an issue)	Contact Type	Service_Request.CONTACTTYPE

SR_RES (Required Validation)

Service Central

Service - Resolution (from Issues, select View and enter issues, enter/edit record, and click Resolution)	Resolution	Service_Request.RESOLUTIONCODE

SR_SRVTYPE (Required Validation)

Service Central

Service - Request (from <tIssue>, select View and enter issues, and enter/edit record)	Type	Service_Request.SERVICETYPE

SR_SYS (Validation)

Service Central

Service – Request (from Issues, select View and enter issues, and enter/edit record)	System	Service_ Request.IMISSYSTEM

SR_VERSION (Validation)

Service Central

Service – Request (from Issues, select View and enter issues, and enter/edit record)	Version	Service_ Request.PRODUCTVERSION

STATE (Validation)

STATE is a validation-only table, which comes preloaded with all 50 two-character abbreviations of the United States (with full name descriptions). It also contains valid codes for the District of Columbia, for Canadian provinces, and for some U.S. related regions. You can add any entries you need.

SUFFIX (Validation)

Titles or abbreviated titles that will follow the contact's formal name (for example, Jr., Sr., III).

Customers

Manage customers (from Customers, select Manage customers, and enter record)	Suffix	Name.SUFFIX

Events

Attendee (from Events, select Register a customer, enter/edit record, and select Attendee tab)	Suffix	Orders.SUFFIX Order_ Badge.SUFFIX

Exposition

Expo Registration - Name/Address (from Exposition, select Process booth orders, enter/edit record, and click Options> Address)	Suffix	Orders.SUFFIX

Orders

Order Entry - Name/Address (from Orders, select Enter and edit orders, enter record, and click Address)	Suffix	Orders.SUFFIX

TITLE (Validation/Lookup)

10.5 and later – Added to Relationship tab. Professional titles or positions used in contact management.

Customers (lookup only)

Manage customers (from Customers, select Manage customers, and enter record)	Title	Name.TITLE
Relationship Detail window (from Customers, select Manage customers, select Relationships tab, click New)	Title	Relationship.TITLE

Events (validation)

Attendee (from Events, select Register a customer, enter/edit record, and select Attendee tab)	Title	Orders.TITLE Order_ Badge.TITLE

Exposition (validation)

Expo Registration - Name/Address (from Exposition, select Process booth orders, enter record, and click Options > Address)	Title	Orders.TITLE

Orders (validation)

Order Entry - Name/Address (from Orders, select Enter and edit orders, enter record, and click Address)	Title	Orders.TITLE

ZIP3 (Validation)

ZIP3 is a validation-only table comprised of three-digit ZIP codes that reference the city to which each belongs.

Getting started with iMIS web-sites

iMIS 20 is the Engagement Management System (EMS) that allows organizations to engage their members anytime, anywhere, and from any device. iMIS 20 includes member management, member self-service, social engagement, private communities, mobile access, and website management – all in one cloud-based system.

iMIS 20 offers a variety of dynamic, out-of-the box, Quick Start Sites. Under Core Sites you will find Staff and Administrative Console. For Sample Sites: Annual Conference, Annual Conference Mobile, Donor, Member Mobile, and Member. And with the additional power of RiSE tools, Sample Sites can be tailored – or created new.

The following is a brief description of what you and your members can expect to see upon visiting your various sites – whether on desktop, laptop, or mobile device.

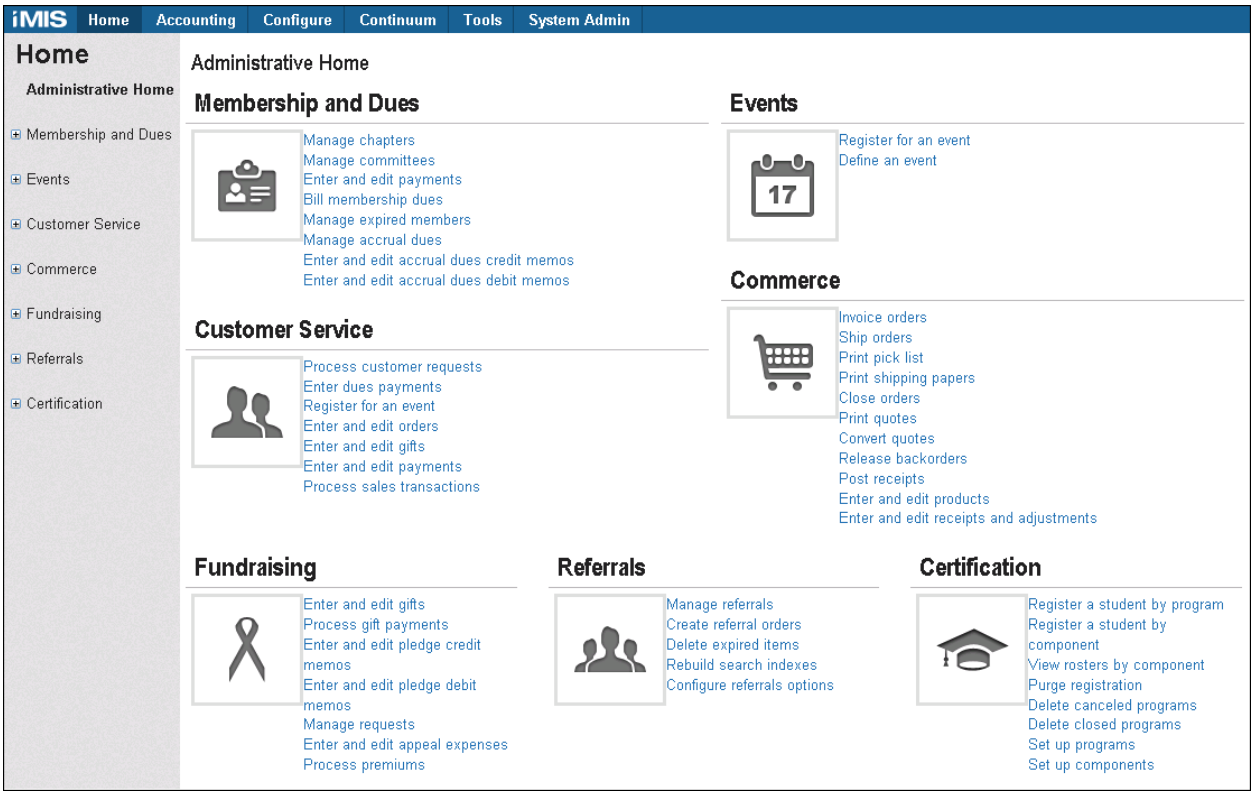
> **Note:** Tip: For further info on creating your iMIS sites, as well as documentation on the areas described in Getting started, please click on the conveniently located links within the descriptions.

Core Sites

Artfully designed to be used by organizations as-delivered in iMIS 20, Administrative Console and Staff are teeming with strategic content and management functionality.

Administrative Console

Operating from a workstation that can be hosted locally or remotely, iMIS Administrative Console is a streamlined, easy-to-use interface alternative to the earlier iMIS Desktop. (iMIS Desktop continues to allow an administrator to define and setup iMIS. However, as iMIS functionality is accessible from the web, many setup options can be administered in that way.)



Staff

iMIS Staff|topic=Using the iMIS Staff Site offers an attractive, easy to navigate, cloud-based site that staff can utilize to manage your organization's day-to-day activities in the areas of: Community, Fundraising, Events, Commerce, Continuum|topic=Continuum - Reporting, and RiSE. In addition, staff members with administrative privileges can utilize the powerful tools in RiSE to create and manage|topic=Creating a site your organization's additional websites – all from one central location.

From running reports to creating and managing events, organizations can call on the powerful security features of iMIS to finely tune which areas and content staff members can access.

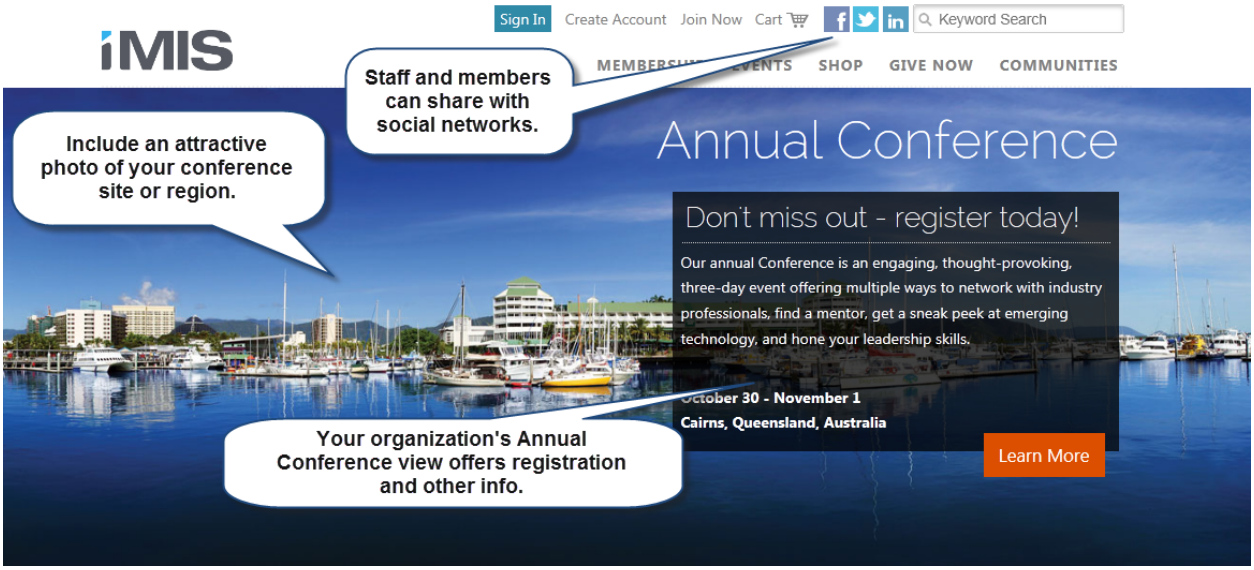
Staff view also provides a quick-view Dashboard of up-to-date info on your organization's activities within Community, Fundraising, Events, and Commerce.

Sample Sites

Designed to be copied and added to your organization's managed websites, Sample Sites can be imitated or, with powerful RiSE tools, tailored or created new to meet your organization's last-minute or pre-planned website needs.

Annual Conference

One of the most important events for organizations is their Annual Conference. With its dedication to conferences and other key projects, this iMIS microsite can be tailored|topic=Working with iMIS Sites by your organization with your own unique content. Tailored sites can maximize the impact of your conferences, without affecting your main site; iMIS seamlessly integrates content between your various sites.

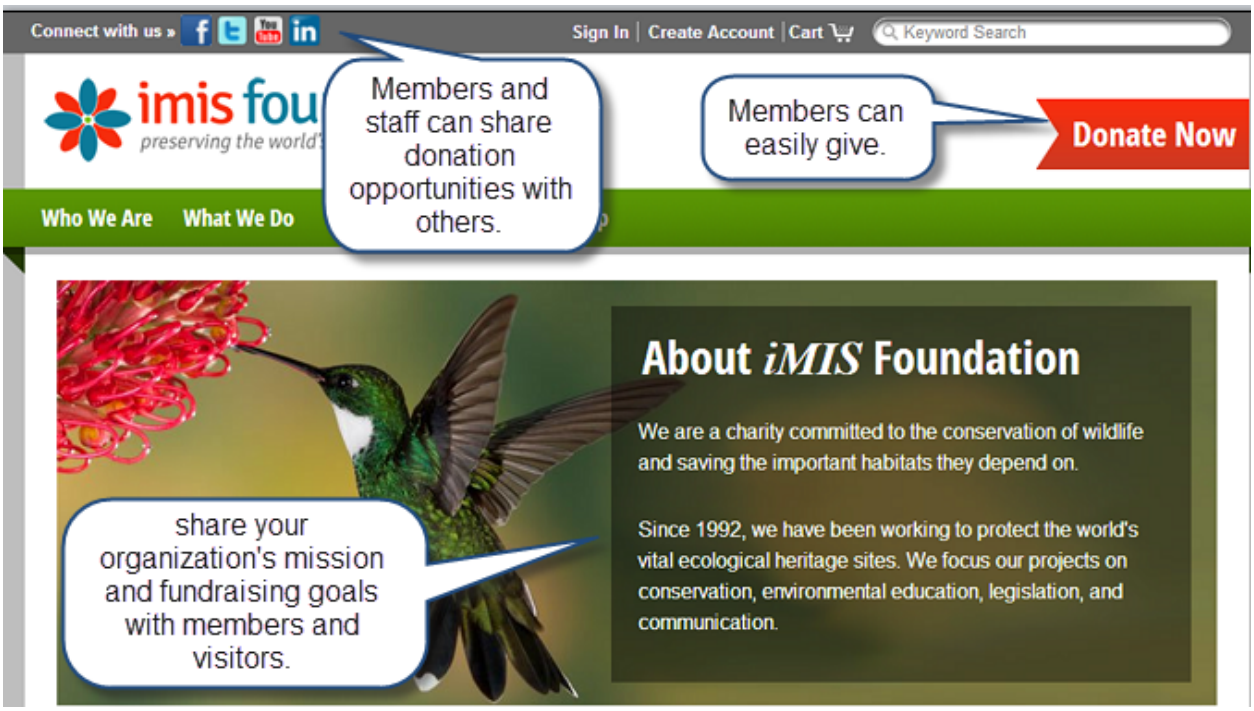


Annual Conference Mobile

This site renders a version of your Annual Conference that is optimized for use on mobile devices for both members and staff. Annual Conference Mobile|topic=Creating a site is especially handy for members and staff while attending conferences – they can gain quick access to their personalized programs, activities, event feeds, and instantly look up directory profiles of other attendees.

Donor

The Donor|topic=Working with iMIS Sites site offers options for quick donations and sharing, as well as shopping and learning more about your organization's missions and fundraising goals – including immediate fundraising needs|topic=Donation Creator. The Donor site offers a customizable experience for your members and the general public.



Member Mobile

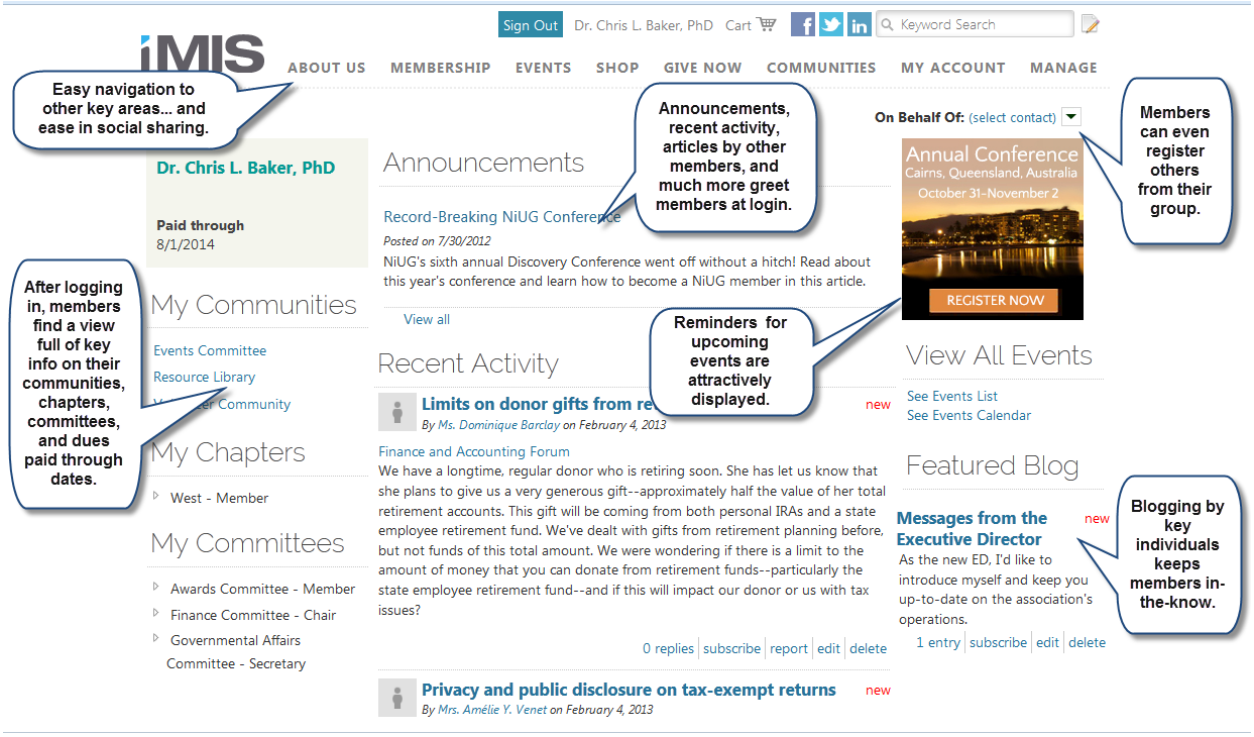
Your organization can engage with and energize your members with iMIS Member Mobile view|topic=Implementing a mobile site. Smart phones, tablets, and other mobile devices have a streamlined view, with easy access to key areas of your organization's site. The Member Mobile site is an easy connection for members and staff on-the-go.

AT&T
1:20 PM
77%
iMIS
Mobile view offers Shop and Cart.
Cart
Upcoming Spring Conference
Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.
Keep your mobile members current on upcomign events.
Directory
Donate
Events
With roomy title bars, mobile members will have a great navigation and viewing experience.
Home
News
Shop
Not finding what they need? Mobile members can do a search of your site for additional info.

Member

With its modern look and streamlined placement of key info, your members will find a Member site that inspires engagement. With many diverse areas to not only visit, but participate in, including Membership, Events, Shop, Give Now|topic=Building donation pages, and the ever-favorite Communities|topic=Community, iMIS Member is designed for a self-service experience, engagement, connection, and ease in navigation.

Organizations can choose from a variety of visual themes, quickly change navigations, and add query-driven iParts to present dynamic member info.



iMIS websites by view and class

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

Licensing - the keys registered in your iMIS database which enable features and numbers of users

Credentials - the user class and any roles, groups, authorization levels, and access keywords defined in each user record

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

Features	Admin	Staff	Admin	Staff	Member
Community					
Find/view contact or committee*	■	■	■	■	directory*
Add new contact	■	■	■	■	my company*
Edit contact profile data	■	■	■	■	myself, my company
View activities	■	■	■	■	my transactions
Add/edit call log	■	■	■	■	
Maintain user logon/password	■	■	■	■	
Add/edit committees	■		■		
Add/edit non-call activities	■		■		
Manage chapter rosters	■		■		
Run contact-related reports	■		■		
Events					
View event registrations	■	■	■	■	myself, my company
Run event-related reports	■		■		
Register contact for an event	■				myself, my company
Set up/manage events	■				
Fundraising					
View giving history	■	■	■	■	myself
View gifts, pmts, adjs, rqsts	■		■		
Enter gifts via Rapid Gift Entry	■	■		■	
Run fundraising-related reports	■		■		
Process donation for a contact	■				myself
Commerce					

View product orders	■	■	■	■	myself
Run orders-related reports	■		■		
Place product orders for a contact	■				myself
Set up products or warehouses	■				
View billing history	■	■	■	■	myself
Run billing-related reports	■		■		
Process accrual dues	■				
Pay billing for a contact	■				myself

Note: *Which contact records can be accessed?

Note: Members find contacts and committees through the directory, which shows limited contact information

Note: Members can access their own records

Note: Members can also access the profile and event registrations for others in their organization (my company), but only if authorized to manage their company roster

Note: Users with access to the Staff site and to the Administrative Console are able to access all contact information

Getting Started

The iMIS Service Oriented Architecture project (iMIS SOA) provides a new opportunity to leverage the iMIS platform. Among other goals, iMIS SOA provides a secure set of web services for accessing the iMIS platform, across the organization, across different physical locations, and even across organizational boundaries.

iMIS SOA leverages the current technologies of iMIS, but it also uses patterns and approaches that support future versions of iMIS. This includes concepts such as universal membership groups, universal order entry, and updated contact management approaches.

iMIS SOA web services is accessible by .NET application developers and by any platform that is equipped for SOAP/web services access technologies.

What are iMIS SOA and iMIS Web Services?

iMIS SOA consists mainly of a set of web services that enable access to much of the iMIS application platform. One definition of web services:

A collection of Web and object oriented technologies for linking Web-based applications running on different hardware, software, database, or network platforms. For example, Web services could link key business functions within the applications a business shares with its customers, suppliers, and business partners.

A simple way to look at iMIS SOA web services is that it presents a universal web-based Application Programming Interface (API) to iMIS that can allow a wide variety of customer and partner developer applications to communicate with iMIS, regardless of technology or application platform. For instance, applications can be written in Microsoft .NET technologies, or almost any other platform such as Java, JavaScript, or Adobe Flex 2 (Flash), and do not need to be server based. In addition, AJAX applications can access iMIS SOA services.

iMIS SOA is implemented using Microsoft Windows Communication Foundation, which is a part of .NET 3.5 and later. Applications written in Microsoft .NET technologies can

utilize a supplied or programmer generated Web service client interface with a wide variety of protocols including HTTP/SOAP, HTTPS, TCP, and others, and can use a wide variety of security bindings. Other non-Microsoft technologies can access iMIS SOA via HTTP/SOAP and WS-I. According to the needs, wide varieties of security bindings are available.

Simple example of accessing iMIS SOA via Microsoft C#

```
//
// get PartyName (contact name) for Party (contact) Id 101
//
string partyId = "101";
var entityManager = new EntityManager();
var membershipManager = new MembershipManager(entityManager);
PartyData party = membershipManager.GetPartyByPartyId(partyId);
string partyName = party.Name;
```

General Approach

iMIS SOA presents a high-level business view of the iMIS infrastructure that is mainly independent of the underlying infrastructure and implementation of iMIS. The view references the next generation of iMIS capabilities and iMIS concepts, yet it works over existing views of the latest release of iMIS today. Many of the concepts, names, and data structures for familiar business entities reflect broad industry standards that at first may not be familiar to long-time iMIS implementers.

iMIS SOA borrows terminology and some data structure from www.oasis-open.org, though it does not implement these standards strictly. Instead, many core concepts are leveraged, with additions specific to the needs of iMIS, as well as subtractions to keep the implementation no larger than necessary for iMIS.

iMIS SOA follows the normal approach for implementation of Windows Communication Foundation. Data structures and services are defined via various contracts, including data, service, and fault contracts. In turn, the entire API is well described via Web Service Description Language (WSDL). In fact, the WSDL description is rich enough the entire client API is actually generated from the WSDL for the various services.

iMIS SOA represents iMIS data in terms of advanced models that are similar to patterns that will be included in future versions of core iMIS. Some examples of these patterns follow.

Universal membership groups

All "people lists" are represented as a standardized membership group concept. So main memberships, subscription groups, sigs, chapters, committees, communities, event registration and function groups, company and family rosters, media lists, communities, security, and other participant groups, are all represented uniformly.

Universal order entry / commerce

All commerce transactions and history, regardless of type, are represented uniformly, with extensions as needed.

User-defined tables, user-defined activity

These are all represented uniformly.

iMIS SOA introduces new terms for core CRM elements. These names are more standardized in terms of Oasis-Open and other standards. Though these names appear in the underlying implementation, there is no concept that user interfaces need to or should change. (See the Glossary for a list of commonly used terms.)

Access to data is via various web services. Web services become the exclusive mechanism for importing or exporting data to and from iMIS.

iMIS SOA web services utilizes iBO and other API's and access methods to expose data. This ensures data is traveling over well-tested paths. As future versions of iMIS come

along with other new underlying API's, iMIS SOA will incorporate the new API elements, but for the most part, shield existing applications from the change.

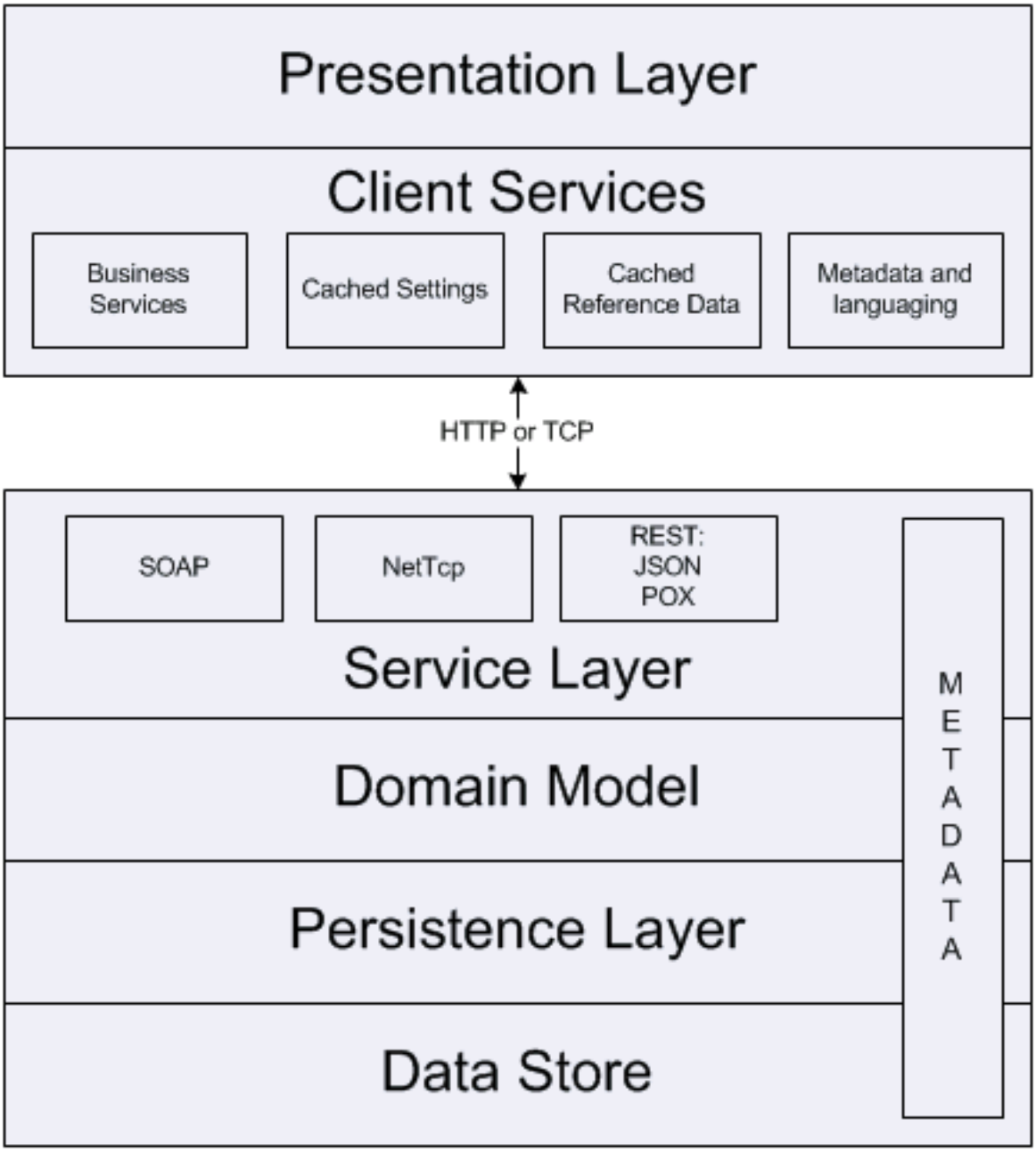
iMIS SOA Web Services essentially is an extensible platform for providing web services for iMIS. Though iMIS SOA Web Services provides a core set of services, the model is extensible: ASI, partners, and customers can add support for new types of data, queries, and processes at any time.

There a few special built in entity types. These include:

- The special IQA entity that can run IQA queries
- All defined BOD (Business Object Designer) entities
- All available tables and views

Architecture: Importance of Layers

A diagram of the internal architecture of iMIS SOA can help in understanding how it operates in several “layers”. While application developers will only work with the Client Services and Service layers, a basic understanding of the underlying implementation will be useful for future topics as SOA becomes integral to the overall application.



Presentation

The presentation layer represents the client application or UI that interacts with the model via web services. All iMIS iParts are an example of the presentation layer.

Client applications work either with the service layer directly or with the client services layer

Client Services

Client services are a simple remote façade to the service layer. The client application does not see any implementation details below the service layer. The actual API for common operations (such as Find or Add) is at the service layer.

Data Contracts

Data contracts are common between the client service layer and the service layer; they can be used up and down all layers, if needed.

Service

The top-level service implementation (the EntityService) works not with the persistence layer directly but rather with the domain layer.

Domain

The domain layer provides a consistent interface to the service layer, through “repositories”, and provides high-level unit-of-work “in process” object tracking (such as dirty objects, objects that need to be added, and objects already read). Repositories, which are domain-level devices, interface with persistence strategies to do basic IO operations.

Domain-level objects are the objects that the persistence level retrieves. In some cases, we can use data contract classes for instances of domain objects, but sometimes they are different, unique domain-level classes. That is, domain-level objects may include additional properties and methods that are important to the underlying implementation but are not exposed in the data contract at the service layer.

Therefore, most data passes up from the persistence strategy into intermediate domain-level object instances and are eventually translated to data contracts at the service layer.

Of course, it all returns the other way as well. The service layer deals with data contracts on the API side and domain objects on the domain side.

Persistence

The persistence layer contains the persistence strategies, which define how domain objects translate to an underlying data store. Persistence strategies may work with SQL source or other intermediate devices, such as iBO, IQA, BOD, and even other web services. Persistence strategies, such as LINQ to SQL persistence strategies, may utilize LINQ mapping classes or dynamically generated classes for very transient “persistence instances”.

Data Store

The data store layer represents the underlying device for how data is persisted. In the case of iMIS data, this generally means a SQL database. Multiple implementations can share the code at the domain level.

All code at the domain level and above is sharable or the same for multiple implementations, such as i15 and future releases.

Summary

There are usually four kinds of instance objects:

- Manager Helpers – helper classes in the Client Services layer that simplify common operations
- Service layer instances of data contracts – translated to domain objects when executing requested service operations
- Domain-level objects – not exposed in the API
- Persistence layer objects – not exposed in the API

As an example of how objects are instantiated, a typical update operation occurs as follows:

- At the service layer, the current instance of the domain object being updated is fetched up through the persistence layer.
- The service layer applies the requested updates from the instance of the client data contract.
- The domain object is persisted back. Typically, the service layer cannot update all properties of the domain object directly.

SOA setup

Requirements for web server

- Windows Server 2003, Windows Server 2008, Windows 7, or Vista
- Microsoft .NET 3.5, SP 1 (will be installed automatically if is not already loaded)
- SSL support (requires an appropriate certificate)

Installation

The web host and service host (AsiSoaHost15) are automatically included in all iMIS application server installations.

Configuration

The iMIS SOA Service Host (AsiSoaHost15) is a Windows service, physically located in <installdir>\net\bin\Asi.Soa.ServiceHost.exe. This SOA service includes a Net TCP endpoint.

This endpoint implements minimal security (by design). You must take additional actions to prevent unauthorized access to the endpoint. By default, the Net.TCP endpoint listens

on port 16000; you can change this to another port by editing the Asi.Soa.ServiceHost.exe.config file and restarting the AsiSoaHost15 service.

The recommended configuration is to limit access to this port to only specifically trusted IP addresses. These should include at minimum the addresses of any public or WCM servers that will be using (or hosting iParts which use) SOA to communicate with the database via the application server. Additional trusted servers might be in-house applications that use WCF to communicate with the application server. This endpoint should not be made available externally; for B2B and other external scenarios, the Soap11 (username/password required) endpoint is recommended.

To prevent unauthorized access, secure the host service's port by configuring Internet Protocol Security (IPSec). See Microsoft IPSec http://technet.microsoft.com/en-us/network/bb531150.aspx for a complete overview and walkthroughs of IPSec on both Windows 2008 and Windows 2003 platforms.

After completing installation, check the web.config values:

- Find the setting DefaultCountryCode and ensure the value is set as desired.
- Find the setting DefaultPaymentMethodId and set the value to the site's default cash account code. This value is used for creating financial batches.

Troubleshooting SOA

If you experience SOA connection problems, check the following to troubleshoot the problem.

- Restart SOA and IIS after all your changes are complete.
- Verify that you ran the MIU from the iMIS install directory. This configures the SOA service.
- Determine if Web Services is returning the correct WSDL. Go to the EntityService URL and check the WSDL address: http://[your website]/[your web application name]/EntityService.svc

Example: http://imis.mysite.org/imis15/EntityService.svc

- Inspect your SOA service using SOAP UI: http://www.soapui.org/
- If you need to set up SOA for external access, then we recommend that you set up a public domain name pointing to the appserver (e.g., imis.mysite.org) as early in the process as possible. If you have to change it after implementation, rerun the MIU to reconfigure and update the desktops to point to the new URL. Make sure that the URL is also accessible from the internal network so that the application server, web server, terminal server or desktops can also see the new domain (e.g. imis.mysite.org). You also need a publicly signed SSL certificate running on the server. Registering a * SSL certificate simplifies this task. Once you've got your domain you need to bind the domain to the site. Basically this means setting up a host header in IIS. Go into IIS and make sure that the website host headers point to your new domain for both HTTP and HTTPS. In IIS7 these are called Bindings. If the SSL Binding is grayed out in IIS7, see the steps below.

  Problem: The Host name is not available for editing

1. Open Internet Information Services (IIS) Manager.
2. Edit the Site Bindings for the website you want to assign an SSL certificate to. To get to Bindings in IIS7:

- Select your website in IIS.
- In the right nav area of the Edit Site section, select Bindings… .

3. Select the HTTPS port and click Edit.

   Note that the Host Name (Host Header) field is unavailable for editing.

4. Launch the Microsoft Management Console (MMC).

- Select Start > Run.
- Type in MMC and hit enter.
- From the console, select File > Add / Remove Snap-in.
- Select Certificates from the Add/Remove dialog.

- Select Computer Account when prompted for which certificates the snap-in will manage.
- Select Local Computer when prompted.
- Click OK to add the Snap-in to the MMC.

5. Locate your SSL certificate.
   - For self-signed (SELFSSL), look in Personal.
   - For installed / purchased, look in the folder where the certificate was originally installed.
6. Right click on the certificate and select Properties.
7. Edit the Friendly Name field so the name starts with an asterisk *.
8. To verify that the Host Name (Host Header) field is now available for editing, repeat steps #1 – 3 above.

Security and SSL Configuration

IIS6

To create a Self Signed SSL Certificate for Windows 2003, you need to download the IIS 6 Resource kit and install the SelfSSL 1.0 program. The documentation included with the Resource kit describes the optional parameters that are available.

Sample command line entry

This entry is for creating and registering a self-signed certificate:

Selfssl /V:1000 /T

If the installation has more than one web site under IIS, run the command using the /S parameter and the site id for the site you are trying to secure.

You might need to use the /N:cn parameter, which sets the “Issued To” property of your certificate.

For more information, see Configuring Server Bindings for SSL Host Headers (IIS 6.0).

IIS7

If you are running IIS 7, you can create a self-signed certificate for testing using the IIS user interface. See these example instructions.

Common Resources

Standard Data Types

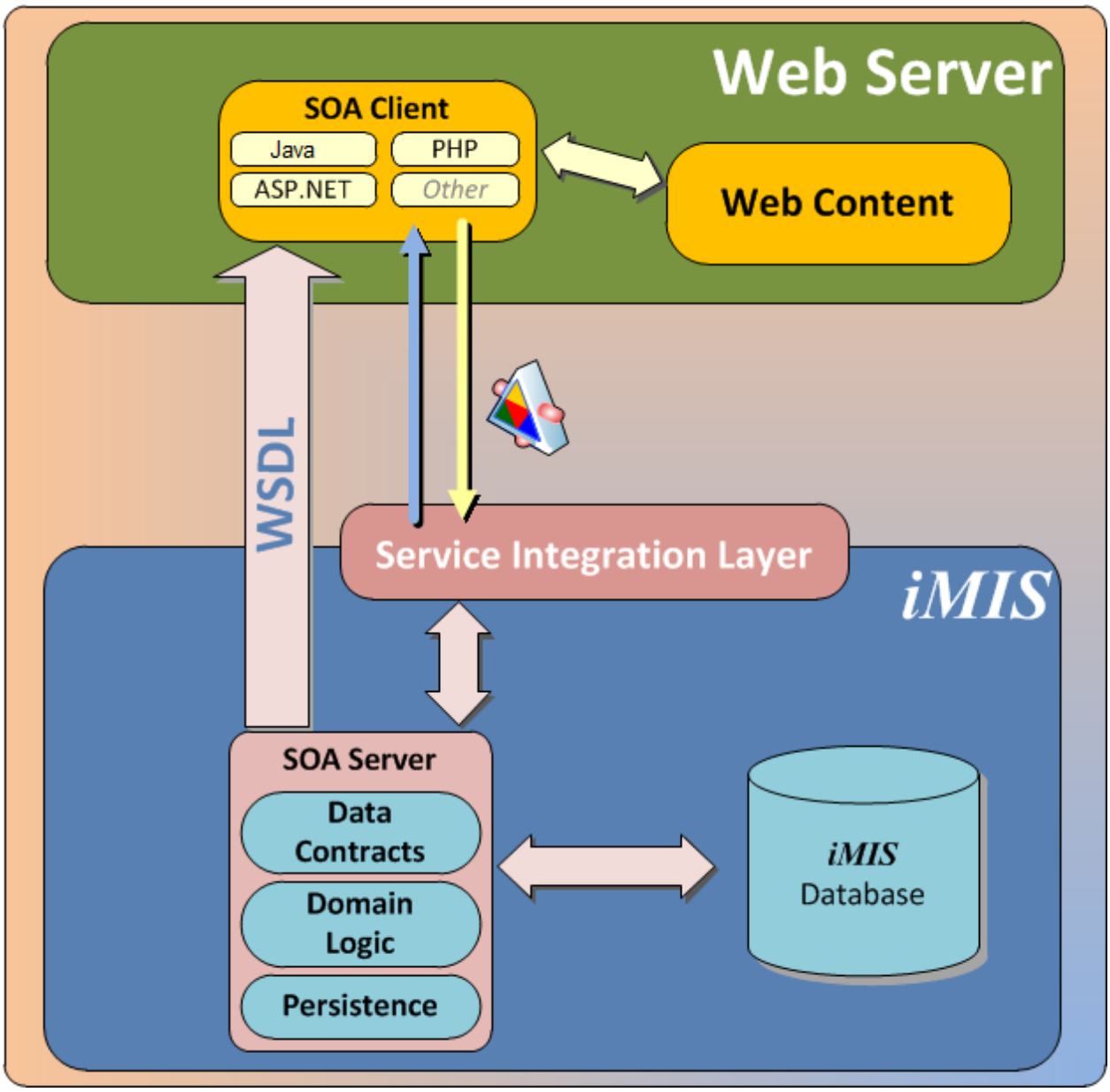
iMIS SOA uses a few new core/primitive data types throughout the system:

- MonetaryAmountData – a money amount that includes both a decimal amount and currency type. Use this type with all money amounts.
- QuantityData – a quantity that includes a unit of measure. Use this type with all order entry quantities.
- AternateIdData – a generic approach for alternate identifiers for parties, products, etc.
- YearMonthDateData – a date specifically for year and month only.
- EntityUpdateInformationData – a standard set of created/updated, by/on values. This is generally read-only, meaning never set by the client. The …by properties contain information that is useful for the UI, such as login Id, not GUIDs.

Most of these types have constructors and conversion methods to other data types.

Client Helper Classes

Once installed, iMIS SOA Web Services provides a complete WSDL description to web service consumers that fully describes the available operations and data structures (data contracts). Many programming tools are available that can create a proxy or client object to make data access easy through the generated object model.



With this in mind, there are basically three approaches for accessing the iMIS SOA Web Service API. These include:

- Use one of the provided access tool kits (recommended)
- Create soap call code and handle the underlying XML documents by hand.
- Generate a client “proxy” which fully describes the available operations and data contracts. This is known as a “Service Reference” in .NET.

Depending on the client environment, the first and second options are both good options. The first option is usually preferred as the provided toolkits add a few useful “helper extensions” that make data manipulation a bit more convenient.

Test Client

The iMIS SOA Web Services includes an example client application which demonstrates several iMIS SOA Web Services patterns. It also includes a client library which is recommended for access to the web services API. It is recommended that one install and become familiar with the sample client and the demonstration web service site, before installing and testing your own web services server instance.

A test client is provided as a Visual Studio 2008 project. It includes a sample set user interface to facilitate and demonstrate searching for a list of contacts (Parties), retrieving an individual party, updating a party, reveal and display group participation, user define demographics and change log.

PHP Toolkit

iMIS SOA Web Service includes a PHP Toolkit. The toolkit provides a number of PHP class definitions, a web access client, and a number of examples that illustrate the use of the toolkit. The PHP Toolkit.zip file can be downloaded from iMIS Community (http://www.imiscommunity.com/imis_soa_web_services).

Glossary of Terms

Accounting

The systematic recording, reporting, and analysis of the financial transactions of an organization.

Accounting date

The Date assigned to the journal entry (or journal entries) related to the upfront recording and posting of a commerce transaction or to subsequent processing of the commerce transaction related to the change in accounting status. The accounting date should always align with the invoice date for an accrual standard invoice or an accrual adjusting invoice. For a payment, the payment deposit date should be used to record the cash receipts journal entry.

Accounting period

A regular period of time for which a financial statement is produced.

Accounting policy

A systematic routine that determines how the financial transactions of an organization are recorded and reported, such as how income (whether earned or a gift) is received and recognized, how expenses are authorized and paid, and how assets and liabilities are presented on the organization's financial statements.

Accounts receivable

Money owed to an organization by customers who have bought goods or services on credit (when income is recorded on the accrual accounting basis). Accounts receivables are current assets that continually turn into cash as customers pay their bills.

Accrual basis

The system of accounting in which the income is recognized when it is invoiced or earned instead of when the invoice is paid.

Adjusting invoice

Invoice that is cross-referenced to a standard invoice for the purposes of increasing or decreasing product charges and/or reducing the open balance of the invoice.

Adjustment transaction

A commerce transaction (or a part of a commerce transaction) that impacts the current status of an original posted transaction.

Alias

(IQA) An alternate name for a column (property).

Announcements

Items posted for information only. Announcements typically allow no replies.

Application Service Provider (ASP)

Third-party entities that manage and distribute software-based services and solutions to customers across a wide area network from a central data center. ASPs may be commercial ventures that cater to customers, or not-for-profit or government organizations, providing service and support to end-users.

Asset

Something valuable that a financial entity owns, benefits from, or has use of, in generating income. In accounting, an asset is something an entity has acquired or purchased, and which has money value (its cost, book value, market value, or residual value). An asset can be (1) something physical, such as cash, machinery, inventory, land and building, (2) an enforceable claim against others, such as accounts receivable, (3) a right, such as copyright, patent, trademark, or (4) an assumption, such as goodwill.

Authenticated user

A user who has logged in

Batch

A group or collection of transactions of the same general type. The transactions may be batched together by date or by other parameters.

Bill to contact

The party financially responsible to pay for an order. A single bill to contact is assigned to each order and to each invoice.

Billing

The processing of renewable, specified-term products for a group.

Billing address

The address to which the invoice document should be sent. For online payments, the billing address of the credit card which is used for credit card verification.

Blog

Chronological listing of entries, often created by one individual.

Book

A set of pages tied together in a hierarchical parent-child relationship. Multiple levels can exist and these can be used for manuals, FAQs, or other content groupings.

Business Object

A collection of self-contained data that represents an entity or process, and shields the physical data.

Cash accounting

The system of accounting in which income is recognized when the payment is received for an invoice.

Cash GL account

GL Account that aligns with an individual bank account that is owned by a financial entity. Traditional payments, once processed and posted, will result in an increase in the balance of a Cash GL account.

Cash receipt

Cash amount (currency and checks) received and deposited into one of the organization's bank accounts.

Cash receipt document

Document that confirms the receipt of a payment from a customer and communicates information about how the payment was applied (such as applied to a new order or an existing open invoice balance).

Cash receipts journal

Journal in which all cash receipts are recorded before they are posted to the general ledger. These entries are reconciled regularly with the bank statements as an internal auditing measure.

Chapter

Method to organize contacts by regional areas.

Chart of accounts

System of accounting records developed by every organization to be compatible with its particular financial structure and with the amount of detail required in its financial statements. The chart of accounts consists of a list of GL account names and numbers showing classifications and sub-classifications, serving as an index to locate a given account within the general ledger. A company has the flexibility to tailor its chart of accounts to best suit its needs, including adding accounts as needed.

Commerce

The trading of something of value (such as goods, services, or money) between two parties.

Commerce transaction

The data set result from the recording and processing of any or all of the following items: one or more new customer purchases one or more prepayments an ordered product the assignment of payment or billing instructions for an unpaid order balance one or more payments of an existing open invoice balance an adjustment related to a previously processed and posted transaction

Comparison Method

(IQA) Specifies the method by which data is restricted for a column.

Contact status

Method to indicate standing within the organization for specific actions, communications, and workflows. Defaults: A – Active S – Suspended I – Inactive D - Mark for Deletion

Contact type

Method to categorize a contact for specific actions, communications, and workflows.

Claim

In security, an individual right or action applicable to a particular resource. Individual rights are granted by a particular Issuer and allow a user to perform a specific operation on a specific resource or group of resources

Claims set

In security, a collection of claims granted by a particular issuer to a given user or required by a specific resource in order to perform a specific operation.

Commerce item

A representation of goods or services offered for sale. A commerce item may be a physical item, a service, a downloadable item, an event registration, a subscription, or a donation.

Complex group

A group with roles assigned to some or all members.

Components

Individual items within a kit

Content Designer

Content management tool that allows organizations to build and manage pages of text, multimedia files, and iMIS iParts.

Content page

An iMIS definition object that contains the content layout information and iParts needed to render a web page.

Content layout

An iMIS definition object that contains information for how the content zones of a content page will be arranged. A content layout defines only the arrangement of elements that will be displayed for a content page within the main content area - it does not define the over-all layout of the website (which is defined by the site's master page).

Content record

An iMIS definition object stored in the Document System that specifies all the information needed to render a web page for an iMIS-controlled website.

Content tagging

A method of categorizing website content that helps users retrieve information.

Content type

A registered iPart definition that includes the information required by WCM to configure the iPart, publish it, and display it.

Control account

General ledger account whose balance reflects the total of balances of related subsidiary ledger accounts. Accounts receivable and accounts payable are the most commonly used control accounts and their balances serve as a crosscheck (control) of the accuracy of the associated subsidiary records.

Credit

Entry on the right side of a journal entry (that is, it carries a negative accounting sign). Credit has the effect of (1) decreasing an asset or expense GL account balance or (2) increasing a capital, liability, or income GL account balance.

Credit memo invoice document

Official document sent by an organization to a customer (Bill To Contact) stating that an amount has been credited to an original invoice belonging to the customer. A credit memo invoice document is issued for a variety of situations, including when (1) an invoice amount is overstated, (2) the correct price sheet or promotion was not applied, (3) the goods spoil within the guaranty period, or (4) the goods do not meet the customer's specifications and are returned.

Date-limited group

A group with specific join and end dates for the group or for a role in the group.

Debit

Entry on the left side of a journal entry (that is, it carries a positive accounting sign). Debit has the effect of (1) decreasing a capital, liability, or income GL account balance or (2)increasing an asset or expense GL account balance.

Debit memo document

Official document sent by an organization to a customer (Bill To Contact) stating that a new amount is owed due to a change applied to an original invoice. A debit memo invoice document is issued for a variety of situations, including a product price change.

Deferred income

The principle of accounting in which the recording of income is deferred until the accounting perious when the costs are incurred realted to the generation of the income. For example, for an event, the deferred income is recorded during the month in which the event occurs. For a subscription or membership, it is typically spread evenly across the span of service.

Display Order

(IQA) The order that columns display in the results for a query.

Document System

A server-side file system containing documents and objects (business objects, query objects, and output processes).

Event

A gathering of individuals that traditionally occurs at a particular time and place. The event may occur at a particular location and be attended in person (i.e., conference, seminar), or it may occur in a virtual meeting place (i.e., webinar, teleconference).

Event coordinator

An individual who is responsible for managing the planning and/or operation of the event or some aspect of the event.

Event showcase

The detailed display of information about an event. The showcase can include images and a variety of information.

End date

Date on which an individual's group membership ends.

Expiration date

Date on which a group member's role expires. For example, the treasurer might serve one year, but the chair of a committee serves two years. The individuals are still members of the group after their specific role term expires.

Expense

Money expended or cost incurred in an organization's efforts to generate revenue. An expense is typically an event in which an asset is used up or a liability is incurred, such as cost of goods sold, damaged goods, and bad debt expense.

Facility

A location that provides a particular service, typically the venue within which an event is being held (i.e., convention center, hotel, meeting room).

Filter

(IQA) One or more column-specific search conditions.

Financial entity

A legal entity for which a separate set of balanced financial accounts (or set of books) must be maintained independently. Although accounting information from different entities may be combined for consolidated reporting purposes, all transactions and accounts must be kept in balance for each entity.

Fiscal period

A month/year combination expressed in terms of a financial entity's fiscal year (as opposed to the calendar year). For example, if the calendar date of an accounting transaction is April 15, 2009, and the fiscal year begins in April, then the fiscal period is 1/2009. Likewise, if the transaction calendar date is is March 15, 2009, the fiscal period is 12/2008.

Fiscal year

Accounting period covering 12 consecutive months over which a financial entity determines income and profits. The fiscal year does not necessarily correspond to the calendar year.

Formal event

An event for which an official registration or a fee is required as a prerequisite for event participation.

Formal registration

An official event registration for a formal event. Usually, the registrant is expected to attend (i.e., a slot or seat may be held for him/her) unless the registration is canceled.

Fulfillment

The act in which the selling organization meets its financial obligation of delivering the goods and services that have been ordered by a customer. In the case of a physical product, fulfillment occurs when the product is shipped or physically delivered to the customer.

Function (in Events)

A sub-event or session that occurs within the context of an overall parent event. For example, a conference may incorporate multiple functions or mini-meetings over the course of the conference date span. Such a conference may include multiple break-out sessions, social events, and networking sessions.

Function (IQA)

(IQA) Summarizes some characteristic of the current set of rows. The functions that are available depend on the data type of the column you selected.

GAAP (Generally Accepted Accounting Principles)

Authoritative rules, practices, and conventions meant to provide both broad guidelines and detailed procedures for preparing financial statements and handling specific accounting situations.

Gateway account

General journal

Journal used to record journal entries other than those that are recorded in the Sales and Cash Receipts journal.

General ledger

The set of financial accounts (GL accounts) which contains the balance sheet and income statement accounts that summarize the financial activity of a financial entity.

Gift item

A commerce item that has a suggested amount price, such as for a donation.

GL account

An individual account within the Chart of Accounts that is used to record a financial amount in a journal entry.

Group

Method to organize contacts according to pertinent criteria such as chapters, interest groups, industry, or subscribers.

Group member

A contact who is, has been, or will be a member of the particular group.

Group role

A classification of the way in which a group member participates in the group.

Group member status

A potential membership stage or state within a detailed group.

Group type

A method of classifying similar groups for efficiency in setup and reporting. Default information is assigned to a group type, but can usually be changed at the individual group level.

GUID (globally unique identifier)

A 32-character hexadecimal string used to provide a unique reference number. iMIS often uses a GUID to identify controls and interface objects.

Identity claim

A security function that describes a set of attributes about a user or other entity.

Income

An amount generated from the sale of goods or services, or any other use of capital or assets, associated with the main operations of an organization before any costs or expenses are deducted. (Also called revenue.)

Income account

The account number by which income amounts are recorded or recognized. The income account is maintained with the Profit and Loss set of accounts.

Inventory setup options

The accounting treatment to be used for inventory. System defaults are FIFO, LIFO, Average, and Standard.

Invoice

An official object that itemizes all of the product charges and miscellaneous fees involved in a sales transaction. The invoice contains key reference data such as the invoice number, invoice date, references to the originating order, customer information, and billing instructions.

Invoice date

The date on which the invoice was issued or created, usually the date of product fulfillment. For an accrual invoice, the invoice date is the accounting transaction date for the related sales journal entry.

Invoice distribution line

An object attached to a parent invoice line that carries related accounting information and represents the detailed invoice balance level to which all payments are applied. Individual invoice distribution lines are created for each income account that is used in booking the income for the parent invoice line.

Invoice document

The printed or electronic invoice information sent to a customer.

Invoice due date

See "Payment schedule due date".

Invoice header

The portion of the invoice that contains general information about the invoice, such as the invoice number and date, customer information, and billing instructions.

Invoice line

A sequentially numbered line in an invoice that represents the charges for an individual product line (or a partial quantity of a product line) that has been fulfilled or a miscellaneous fee (such as taxes or shipping and handling). The extended amounts of all invoice lines should equal the grand total of an invoice.

Invoice number

A unique, sequential number assigned to each invoice as the primary reference.

iPart

An ASP.NET web part control designed for integration with iMIS that allows user to view and, in some cases, create and edit content.

IQA

Intelligent Query Architect. The query-building tool used to extract data from the iMIS database.

Issuer

A trusted source for granting Claim Sets based on user authentication.

Item

Generic term for commerce objects. For example, an event item, a dues/billing item, or a gift item. Items can be grouped into item sets.

Item class

The method to assign the default GL accounts, tax schedule, standard discount percentage, and other settings to be used for a type of commerce item, such as Chapter Products or National Events.

Item set

A collection of commerce items with related options and rules. For example, and event plus required functions, a product bundle, or a collection of membership and other fees.

Item showcase

A display of information about a commerce item. The showcase can contain all information and images for the item or can link to other pages.

Item type

A general kind of simple commerce item, usually used to differentiate a gift (donation) with a suggested amount from a commerce item with a set price.

Itinerary

A list of functions a person has chosen for an event. The itinerary can contain an informal choice of functions (pre-registration itinerary) or a formal registration, if required (post-registration itinerary).

Issuer

A trusted source for granting Claim Sets based on user authentication.

Joins (IQA)

Relationships between data used in query definition. Joins specify which fields are equivalent so the data is associated correctly.

Join date

Date on which an individual became a member of a group.

Journal

Business diary in which all financial data pertaining to the day-to-day business transactions of an organization is recorded. From the journal, debit and credit changes caused by each transaction will be posted to the designated accounts in the general ledger.

Kit

A product set of two or more components (items or services) that are sold for a single price. Kits are often used to present a group of items as a bundled, discounted product. In addition, kits are a useful method to distribute the costs of individual items (components) among multiple income areas for accounting purposes.

Liability

Claim against the assets or legal obligations of a person or organization. Liabilities include amounts owed to lenders and suppliers, amounts received in advance for a future sale or for a future service to be performed (unearned or deferred income).

Method of receipt

Indicates whether purchased item will be shipped to the customer or customer carries the item out. The method of receipt effects which taxes should be applied.

Monetary application

The link between an invoice distribution line with another object (such as a payment, a payment reversal, or an adjusting invoice) that is applied towards decreasing or increasing the balance of the distribution line. In most cases, a monetary application represents the amount of a payment that is applied towards an individual invoice distribution line.

Multi-function event

An event that incorporates multiple break-out sessions, social events, networking brown bags, or other functions which a registrant can attend.

Net income

Total income in an accounting period, less all expenses during the same period. If income taxes are not deducted, it is called operating profit (or loss). Also called earnings, net earnings, or net profit.

Non-authenticated user

A user who has not logged in

Non-commerce event

An event in which there are no fees. Registrations for a non-commerce event are processed on a direct basis, not through a commerce order.

Object

(IQA) Self-contained element that consists of instructions to manipulate data; for example, a business object or query object.

On behalf of (proxy)

Performing an action in place of another person.

Open credit

The portion of any payment that is in the unrestricted, unapplied state. An open credit can be applied toward new or existing orders or open invoices.

Open invoice

An invoice with an unpaid balance.

Open order

An order that is not 100% fulfilled.

Operation

A well known system function, such as Create, Read, Update, or Delete that can be performed for a specified resource within the application.

Order

A customer request to purchase one or more products.

Organization

Name for company-type contact record.

Parameterized Query

(IQA) A query that requires a value from the user at runtime.

Payer contact

The party who actually made the payment (officially owns the bank account or credit card being used for the payment). The payer contact is normally, but not always, the same as the bill to contact.

Payment

A sum of money paid.

Payment alternative

A category of payment instructions which are provided in lieu of a traditional payment, such as Bill Me, Bill My Company, or Application of Open Credit. Payment alternatives do not create a brand new payment object when processed or posted.

Payment date

The date when a payment was deposited into the bank account. The payment date will always be assigned as the accounting transaction date for the related cash receipts journal entry.

Payment instructions

Information collected and/or derived by the system that indicates how a financial obligation will be met.

Payment method

The allowable method of payment a customer can use and the bank account into which the payment should be deposited. The payment method may specify the general type of payment (credit card, cash, check) or it may specify a specific type of payment (VISA, MasterCard).

Payment method set

The collection of pre-defined payment methods that are allowed for a particular commerce transaction process.

Payment reversal

A complete or partial reversal of an original payment stemming from a credit card refund, a bad check, or a credit card charge back.

Payment schedule

The amount due and due date for payments, in accordance with the payment terms.

Payment schedule due date

The date by which the payment for an invoice balance must be received. The due date is typically calculated as a certain number of days from the invoice date, in accordance with the payment terms.

Payment terms

The period of time allowed to pay for the goods and services that have been ordered. Payment terms may include standard terms (such as Net 30) or a specified payment schedule.

Payment type

The highest-level category of payments such as Cash, Credit Card, Debit Card, or Bill Me. The payment type defines the required information to be entered for payment instructions and how the payment transaction should be processed.

Pay Priority

(commerce) The order in which payments are applied to invoice line items.

Person/People

Name for individual contact record. Contact records contain the descriptive contact and demographic information for each iMIS100 user (and for non-users). A contact record must be created for a new user before you can create a user record to link to that contact record.

Posting (batch)

Procedure that updates accounts with specific transaction amounts or transfers temporary transactions to permanent records (appropriate accounts in the general ledger).

Prepayment

A payment that accompanies an order or is made in advance. The prepaid amount is recorded in an Unearned Income liability account until the ordered products are fulfilled and the payment is applied to the associated invoice(s).

Price sheet

A set of product prices and price calculation rules assigned to customers or orders of a certain type.

Priority

(IQA) The order in which the data for a particular column is sorted.

Proxy

See On behalf of.

Publishing server

A local service running on a web server that generates physical files representing the content defined by a content page and add related search metadata to the search index on the local web server.

Query

User-defined criteria used to retrieve a subset of data.

Registrant

A person who has formally registered for an event.

Registration

The recording of people who sign up to attend an event, typically in advance of the event occurrence (except for on-site registration).

Registration status

The current state of relationship between a person and an event or function.

Registration Type

Designation of an event's requirement for registration or fee.

Relation

(IQA) The part of a query definition that specifies a relationship between two or more sources, which effectively creates a new temporary table against which the query is run.

Relationship (Join) Operator

(IQA) The specific type of relationship between two sources.

Renewal invoice

An invoice generated by the selling organization to request that the customer repurchase or renew a subscription or membership service. The renewal invoice data is generated directly and is not connected to the fulfillment of an order.

Renewal notice

Document that is frequently sent to a customer instead of a renewal invoice. The renewal notice is typically used in cash basis accounting systems to document the renewal or continuation of a subscription or membership.

Resource

An application object that exposes properties and methods to allow users to interact. In claims-based security, such resources are assumed to be secured.

Resource group

A logical group of related resources that share a common set of claims. Such groupings simplify the need for assigning and checking for required claim sets.

Sales journal

Journal for first entry of sales invoices issued to customers for goods supplied or services rendered. Entries from this journal are posted to individual customer accounts. The totals are posted to the general ledger as a debit to accounts receivable and a credit to income.

Schema

The structure of a database.

Search index

A database (used by an index server running on a web server) that is updated by the publishing process and is used for quickly retrieving weighted results for website searches and in the compilation of output for tagged list content.

Shopping cart

A tentative commerce transaction data set that exists for any new commerce transaction until checkout and order submission. The cart may contain products added to the cart, adjustments processed, and the list of open invoices selected for payment. Items can be added, edited, or removed from the cart at any stage before submission.

Simple event

An event with no functions. A simple event can be for information only (no registration required) or can require registration.

Simple group

A group with no assigned roles or date limits.

Simple item

A commerce item that has a single price.

Site Designer

A website and navigation management tool that allows organizations to establish one or more websites, create navigation menus and connect navigation to content.

Source

(IQA) Object that is available for building query definitions. Sources include both business objects and query objects. Query definitions can be created based on one or more sources.

Standard invoice

Document issued by a seller to a buyer detailing goods and services sold. Also called a bill of sale or contract of sale, it identifies the trading parties, the assigned invoice

number, and the invoice date. It also lists, describes, and quantifies the items sold, shows the date of shipment and mode of transport, lists prices and discounts (if any), and shows delivery and payment terms.

Subsidiary ledger

A record of the details to support a general ledger account (control account). For example, the accounts receivable subsidiary ledger provides the details to support the balance in the general ledger control account Accounts Receivable.

System administrator

A user with complete access and privileges

System role

Used in claims-based security. System roles include:

- Non-authenticated user: A user who has not logged in
- Authenticated user: A user who has logged in
- System administrator: A user with complete access and privileges

Tag

Keyword or category name used to classify website information.

Tagged list

Listing of content tagged with a specific keyword and, optionally, related tags.

Tagging hierarchy

Visual means of displaying relationships between content tags.

Traditional payment

A category of payment instructions that, when processed, will create a brand new payment when the order is fulfilled. Traditional payments include Cash, Check and Credit Card.

Tag

A type of metadata that associates a content page with a defined taxonomy for searching and displaying the content page within a website. When a content author tags a content page, the tag is added to the metadata for the content page and to the website's search index. This facilitates the inclusion of the content page in website searches and tagged lists displayed on other content pages.

Tagged list

An iPart which aggregates content pages that contain specified tags and satisfy other defined criteria into a display list. The tagged list definition includes an association with a tagged list format that defines how the aggregated content will be displayed.

Tagged list format

An iMIS definition object that contains information for how a tagged list iPart should display details for each content page that is displayed by the tagged list.

Target contact

The person on whose behalf you are performing an action.

Tax authority

A jurisdiction or geographical area to which a set of specific taxing rules apply.

Tax category

General collection of items that have common taxation rules.

Tax schedule

All tax authorities that apply to particular situation (such as the purchaser, the location, the item class, or the individual item) and the order in which taxes are calculated when more than one tax applies.

Transaction

An event or condition that is recorded in asset, liability, expense, revenue, and/or equity accounts.

Unearned income

A liability that is recorded when assets are received before the order is fulfilled. Unearned income can be due to (1) a payment in advance of products or services being supplied, (2) an unidentified payment, (3) an overpayment, (4) a duplicate payment, or (5) a return or cancellation of products or services involved in an early pre-paid sale.

Unit of measure

The measurement amount for a product, such as case, each, meter, sheet, pack, or box.

Unposted transaction

Any order, invoice, or payment that has been recorded but remains in a tentative state. While in the unposted state, the transaction can be easily changed or deleted without generating an audit trail of the change.

User-defined field

A method to add metadata to content and to filter search results.

Web Content Manager (WCM)

Write-off

Removal of the outstanding value of an invoice that is deemed uncollectible or that carries a trivial positive or negative balance. The result of the write-off transaction is to bring the invoice balance to zero. In the case of an accrual invoice, the amount written off is charged against the net income by recording either a bad debt expense or an adjustment to income.

See Redux Sprint 36A for Fundraising Dictionary

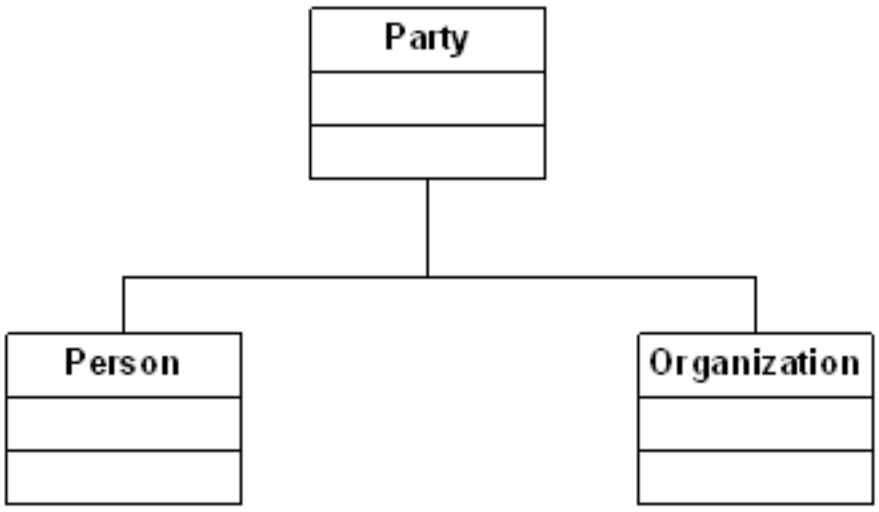
Glossary

Entity and Property names for the ASI web services originate from the Universal Business Language standard created and maintained by the Organization for the Advancement of Structured Information Standards (OASIS). The Universal Business Language (UBL) defines a generic XML interchange format for business documents that can be extended to meet the requirements of particular industries.

For various reasons, iMIS SOA does not use the schema of the UBL, but it does use its terminology.

In UBL, Individuals and Organizations are viewed collectively as Parties who play a role in a business transaction. Dependent on the business process, a Party may play various roles in the document exchange. To account for the iMIS 15 legacy concept of a Name record that represents both an individual and a company, the ComboParty entity has been added to the lexicon.

Membership



Party	A Person or an Organization who plays a role in a business transaction.	Name/Contact records
Person	An individual contact.	Name/Contact/Individual records
Organization	A group of Persons in the broadest sense: a company, institute, or other type of group that will play a role in a business transaction.	Name/Contact/Institute records
ComboParty	Created exclusively to represent an iMIS 15 Name record that holds both a contact and an institute. (that is, a Name record that has Individual information but represents an Institute.)	Name/Contact/Institute record that also contains a Contact/Individual record

- A Person is associated with their primary Organization through the Person's PrimaryOrganizationInformation. This is the equivalent in iMIS15 of the COMPANY_ID property of the Name record.
- The Party's FullAddress contains an (optional) basic postal/physical address, as well as associated phone, fax, email, and other information. This is different from the iMIS15 concept of a full address, which is a fully formatted physical address. In SOA, the FullAddress combines all of the elements of a physical address with the phone, email, and fax associated with the address purpose.
- Part of the FullAddress, the CommunicationPreference indicates the reasons that the address should be used. This is not the traditional address purpose, which is a property within the FullAddress in its own right. CommunicationPreference is a collection of reasons to use the address, such as for alerts, or relating to a specific committee, etc.

  The UBL Groups term is very familiar to iMIS15 and represents groups of several natures (committees, memberships, event registrants, relationships, security groups, etc). Familiar concepts of roles and members remain in the iMIS SOA web services.

Events

The Event construct in iMIS SOA web services is very similar to iMIS15.

- The Event represents the overall event: description, maximum attendees, registration options, etc.
- The EventFunction represents a single function within an event.
- The EventRegistration represents a Party's registration to an event.
- The Facility represents the physical place where an event or event function is to be held.

Core

The iMIS15 SOA Web Services includes some core concepts, some of which correlate to iMIS15 terms.

- The EntityDefinition describes an Entity, a business unit that maintains its own financial books.
- The ChangeLog represents changes to a given object at a given time and directly correlates to the ChangeLog concept in iMIS15.

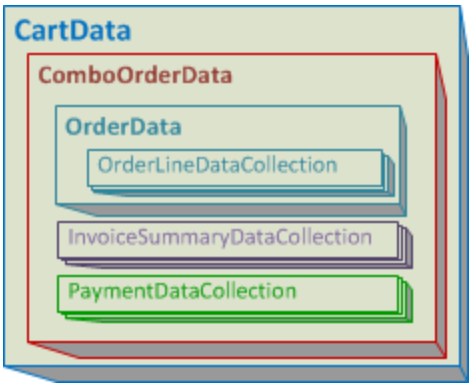
Commerce

- The Order combines the collection of one or more items that a customer requested, the Party making the purchase, and the payment information.
- The CustomerParty represents the Party making the purchase (equivalent to the SoldTo record in iMIS15) and the Party that is financially responsible for the Order (equivalent to the BillTo record in iMIS15).
- An Item is a purchasable product that a customer can add to the Cart to be ordered.

- The Cart is a collection of Items to be purchased, invoices to be paid, and payments to be applied.

Structure of an order

iMIS SOA provides the developer with a “universal order entry” notion. In that concept, a single core structure can describe a wide variety of financial transaction types. With a single order or “Cart”, as we will see below, an order can mix product types, add or update Parties, and include Payments.



Primary order entry data structures

- CartData – includes an Order, a collection of Payments, and/or a collection of Invoices to be paid.
- OrderData – Contains the order including a collection of OrderLines, Delivery (ship to’s), Taxes, etc.
- OrderLineData, OrderLineDataCollection – A generic or subclassed item type specific traditional order line.
- ItemData – A reference to a product.
- CustomerPartyData – A structure that can contain either a simple reference to a Party by PartyId or Id, or an entire Party instance to be added or updated.
- PartyData – A person or organization. A contact.

- DeliveryData, DeliveryDataCollection – A reference to a Party address, or an entire new Party to be added or updated.
- OrderTaxData, OrderTaxDataCollection – A structure to express the tax components of an Order.
- PaymentData, PaymentDataCollection – A structure to express a payment.
- InvoiceSummaryData, InvoiceSummaryDataCollection – A structure to express an Invoice.
- MonetaryAmountData – represents a money amount with currency type.
- QuantityData – expresses a quantity with a unit of measure.

iBO (COM) Programmer Guide

Before you begin iBO

iBO purpose and scope

iMIS Business Objects (iBO) includes the core components Contacts, Events, FundRaising, Orders, Subscriptions, and UserSecurity. These COM-based components enable third-party developers to indirectly access the iMIS database via class interfaces that closely parallel the functional interfaces of the traditional iMIS. These components can be used to build custom web pages that are integrated with the e-Series web site.

iBO provides developers with API visibility to the Contacts, Events, FundRaising, Orders, Subscriptions, and UserSecurity components.

- The Contacts component provides COM interfaces that enable viewing and modifying contact data, such as the contact's profile, addresses, financials, and user-defined demographic data.
- The Events component provides COM interfaces that enable creation and modification of event registrations and reading of event setup data, including functions and pricing structure.
- The FundRaising component provides COM interfaces suitable for accepting simple donations.
- The Orders component provides COM interfaces for creating new standard orders, adding products to the order, calculating prices, freight, handling, and taxes, and reading existing orders from the database.
- The Subscriptions component provides COM interfaces for creating and billing the subscriptions associated with a member type, paying for subscriptions, and querying subscriptions.

- The UserSecurity component provides COM interfaces to validate passwords and to determine the ContactID of the logged-on staff person or member.

The iBO library will be expanded and released in phases. New components will follow, while the functionality of existing components will continue to broaden. Initially, the components will match the functionality contained in e-Series.

General Availability

iBO is generally available to all who meet these requirements:

- Authorized iMIS Service Providers (AiSP)
- Qualified to implement e-Series
- Have clients who are licensed for e-Customer Management
- Have attended an iBO Implementation training class

Getting support and certification

Contacting ASI Developer Support

ASI offers a variety of support options. These include free services on our website, where you can search our extensive information base and connect with other users of iBO.

Support for iBO is provided on a for-fee basis. Submit issues to ASI Support, and Consulting will work with Support to research the answers you need.

Training and certification

You must become certified in iBO technology to receive your license to implement applications using it. These are the steps to licensing:

1. Complete the first prerequisite: e-Series Implementation class.
2. Complete the second prerequisite: e-Series Advanced class.
3. Complete the required iBO training: 2-day technical authorization class.
4. Pass the iBO certification exam.
5. Request an iBO license.

Documentation conventions for iBO

The ASI printed documentation for iBO uses the typefaces and symbols described below to indicate special text:

San-serif	Indicates sample code and proper names of iBO identifiers, such as classes, interfaces, methods, and variables.
Italics	Indicates code comments, as well as new terms and book titles.
Keycaps	Indicates a keyboard key. For example, “Press Esc to exit a menu.”
[ ]	In text or syntax listings, encloses the optional or variable items. Do not type the brackets.
< >	In text or syntax listings, indicates a variable string; type in a string appropriate for your code. Do not type the angle brackets. Angle brackets are also used for HTML tags.
…	In syntax listing, indicates code that is missing from the example.

Concepts for iBO

Understanding iMIS Business Objects

iMIS Business Objects (iBO) are a set of COM components that enable third-party developers to create scalable custom applications that leverage the iMIS backend database. iBO components ensure the integrity of the business rules inherent with the existing iMIS system.

What are Business Objects?

Mirroring the real world

In the broadest sense, business objects represent your business programmatically. Since organizations run on physical objects and concepts, it simplifies things greatly to model their actual players and processes within self-contained software units that directly correspond to real-world entities and activities.

A business object not only contains but also manages its own data. For example, a Customer object must include all of the data and routines needed to represent a customer

throughout all interactions, so that you can use it unchanged across all the applications for your business. This means that you use the same Customer business object in code for taking an order, sending out a bulk mailing, and analyzing sales patterns; no subsequent coding you write can disturb your initial order-processing code: the behaviors are independent and controlled.

Interfaces: The freedom to evolve

Over time, each business object must evolve, gaining properties and methods to support new functionality. However, we try to keep our interface backward compatible so that previous properties and methods (interface) will remain unchanged and your existing applications will work as written without being changed to accommodate the new features.

This freedom from the disruption of future changes allows you to generate rich feature sets at a faster pace by using an iterative, building-block approach - that is, your application is free to evolve as well. Moreover, using business objects containing robust iMIS business logic lets you build your own suites of functionality without risking the integrity of the underlying iMIS database.

Schema encapsulation

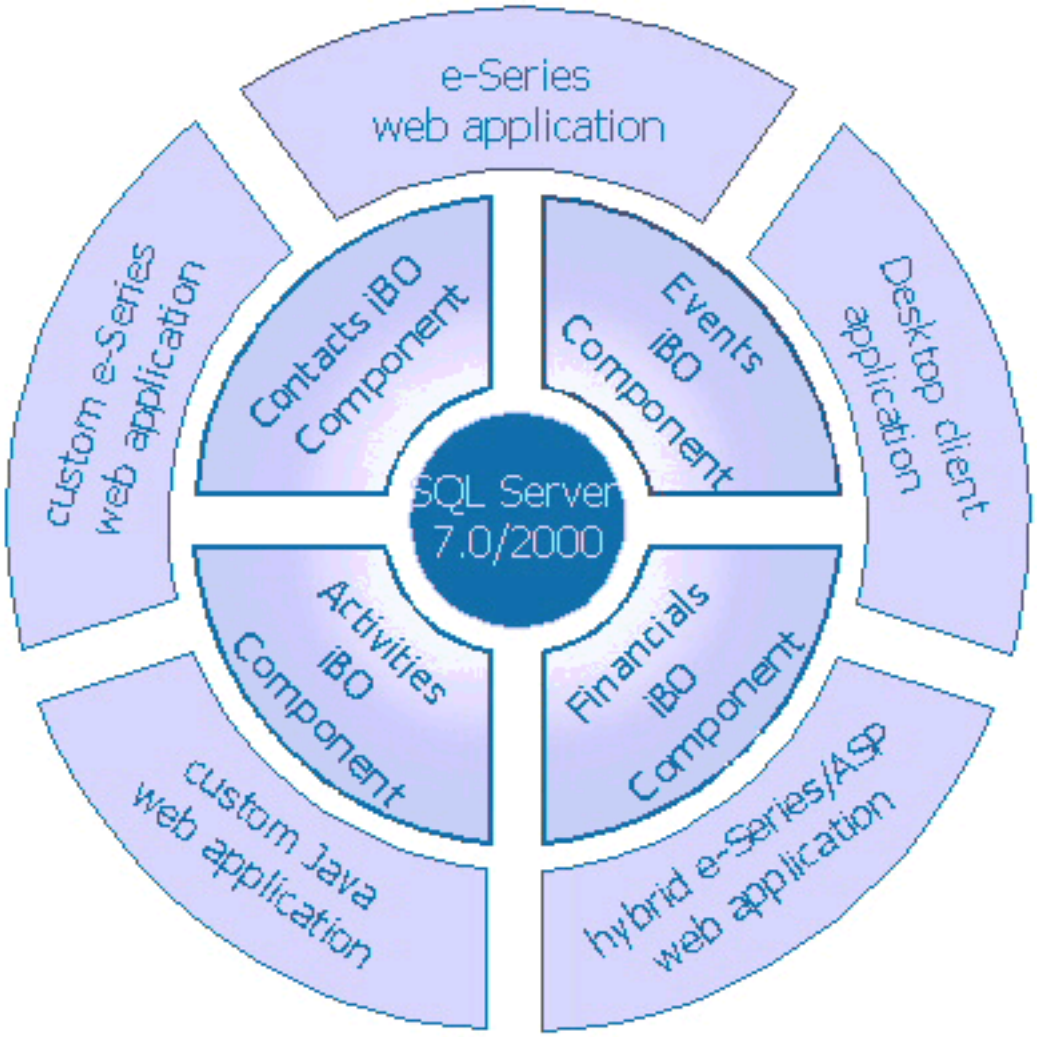
But iBO offers more than interface stability and data validation: because of schema encapsulation, you can focus on the specific value of the features you create without having to master the underlying iMIS database structure or take on responsibility for the database consistency and integrity resulting from your use of iBO.

Without such encapsulation, a developer of any functionality lying on top of a back-end database must thoroughly understand the database organizational structure (schema). Removing this burden is one of the key benefits to third-party developers.

Inherently, schema encapsulation assures greater iMIS database stability because it isolates the effects of executing business rules to just those tables that are directly affected. The resulting clean and modular implementation provides enormous cost savings through reduced complexity and greater scalability.

The general model: Access through layers

The Business Object approach is a generalized model for business objects, intended to encompass many interpretations and implementations. The diagram below illustrates how the iMIS business objects form a protective middle layer of a 3-tier architecture, serving as intermediaries between the encapsulated database and the client applications. Other business object systems may implement a superset or a subset of this model.



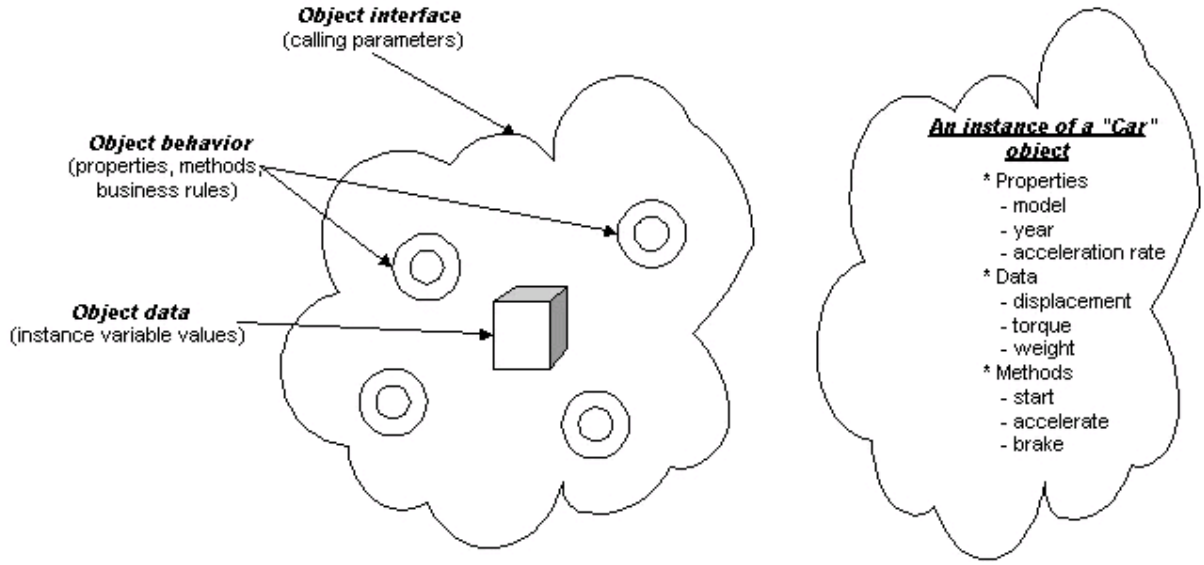
iBO Components as layer between applications and the RDBMS

As shown, the tools underlying the system (such as database systems and technology components) reside, shielded, at the core. Only business objects interface directly with

this layer of tools. The business objects are hidden from end-users, who reach them only through visual presentations and desktop programs. These two inner layers, the business objects and inner data core, comprise the foundations for the iMIS Business Framework Architecture.

What is inside a Business Object?

Business objects are representations derived directly from the abstract concepts of the object-oriented analysis and design model. A business object consists of data (state information) and behavior (properties and methods) that you access together externally through an interface. The specific objects manipulated by application programs are instances of class definitions, where the class serves as the template from which an object is created. For example, a Car class could have an object instance of a BMW, which contains properties describing that particular car (i.e., model, year, acceleration rate) along with the behaviors possible to manipulate it (start, accelerate, brake).



Representation of what business objects contain

Business Object data

The data within an instantiated object is stored within variables that are unique to that specific instance. The values contained within instance variables are particular to each object, even objects of the same class. That way, we can have a Customer class, where

its instantiated objects have different information for different customers (i.e., Acme vs. Ford).

These data variables exist as either Public or Private. Public variables are visible to your calling application, which means that you can manipulate their values directly. Private variables are invisible to you, existing only for use by code contained within the object itself. Variables are usually made Private to allow for the enforcing of business or validation rules; rather than set a variable directly, you call a method to do so.

iBO follows this practice of constraining variables to be Private, which carries a major benefit: object internals and variables can change significantly between product releases with little to no impact on applications that use the objects, because the methods retain their original, abstracted interfaces.

Business Object properties

The properties of a business object provide the most powerful means by which a business object designer can choose what information attributes of the object are available to a client program. Properties do not necessarily have a one-to-one relationship with an object's data. For example, the Car object diagrammed above may not make its displacement, torque, and weight data variables accessible, yet it does allow clients to avail themselves of the acceleration rate property, as computed from the directly inaccessible data variables.

Properties can be read-only, write-only, or both read and write. They can be set up to grant direct client modification of an object value, or they may have additional validation checks or business rules applied subsequent to submission of the value to be modified.

Business Object methods

Simple access to the property attributes of an object is not enough to model full behavioral interactions of the object with the calling client or other objects. Methods provide the mechanisms for an object to offer much more robust services or functionality. As routines within an object, interrogative methods use their own data or passed-in parameters to return values or other information back to the calling client. Imperative methods

merely perform a service as directed by a client, and they may or may not return a status of the function performed.

Who should use iBO?

iBO is intended for programmers working in these situations:

- Association offices
- Authorized iMIS Solution Providers (AiSPs)
- Association management firms
- Organizations needing CRM capabilities

In each case, the programmer uses the Contacts component to create a Windows or browser-based interface to an iMIS installation.

Note: You must learn how to program with COM-based components before attempting an iBO implementation.

iBO's role in iMIS

iMIS Business Objects are functional components that provide an application programming interface (API) to data within the iMIS database. You can incorporate these components in programs written in a variety of languages, such as Macromedia ColdFusion and Microsoft Active Server Pages.

Through the business object's API, incorporating programs gain access to iMIS logic. For example, you can use the Contact business object to return member records from the iMIS database. By using the iMIS business object, all iMIS validation and business logic, such as flow-down rules, is securely enforced.

iBO components and classes

Be aware that not all iBO classes and interfaces that are visible to you through object browsers (and IntelliSense) are for public use. Some exist for internal use only.

There are also certain classes and methods which are Use At Your Own Risk. These API items have been built to support other API items; they are lower-level methods. These

methods have been implicitly tested by ASI's Quality Assurance Department when they tested the released API methods. However, these methods have not been fully tested by ASI's Quality Assurance Department. You can use these methods with the assurance of binary compatibility for future releases. There is no Technical Support available for these methods.

The way to ensure that you are using iBO correctly is to refer to the online API Reference (see "Accessing API Help"), which is an HTML Help (.CHM) file. If a specific method or property is for ASI use only, the reference would make that clear; if an entire class is for internal use, it would not appear in this reference at all.

Functionality overview

iMIS Business Objects offer a versatile tool for extending the functionality of e-Series to meet specific client requirements. For example, you could implement a tailored workflow as part of the client's event registration process; following the tailored workflow, you can add the resulting registration to the e-Series shopping basket or save it to the iMIS database, depending on your client's needs.

The Contact component lets you select an individual contact within the iMIS database, provide access to the contact's data, and load all associated address, notes, and activity records. The component lets you create a list of Contact records meeting criteria that you specify. You can also create and delete individual Contact records through the interface.

The Event component lets you select one or more events, select a particular function, or list the functions within an event. Through the Event component, you can access event and function properties, including pricing information. The component lets you select a specific event registration or a list of registrations, and it lets you create a registration, including payment and badge information.

Invoking server objects

At least two iBO Platform objects must be instantiated before you can instantiate a functional BO object:

1. iboUserSecurity.CUser specifies the database to be accessed, and the CUser instance is passed to BOAdmin objects to establish iBO connectivity. The critical properties in this object are:

- DBID - (required) must be an ODBC DSN, formatted as ODBC:DSN_Name.
- UserID - used by CContact for change logging. You can call CUser.Validate to verify a userID and password. This should be the logon name from the authentication record.
- Password - should be from the authentication record.

2. BOAdmin is the core platform object, which exists specifically for each component:

- iboContactManagement.CContactsBOAdmin
- iboEvents.CEventsBOAdmin

That is, before you can do anything with the Contacts component, you must instantiate the CContactsBOAdmin.

The only properties that these BOAdmin objects have are the ErrorsCount and Errors object. However, the BOAdmin has several methods. You will use these methods to add new data and find existing data.

Naming conventions

While browsing through the API reference, you will see that certain object names are plural. Throughout iBO, a plural name always signifies a collection of objects (for example, Errors is a collection of Error objects).

Plurals are also used for the names of BOAdmin methods. For example, NewRegistration () creates a new Registration, whereas NewRegistrations() creates an empty collection of Registration objects. You must use the collection object to access the methods for pop-ulating the collection.

Note: Each collection object has a property that is its filter: CBatches has BatchFilter, CContacts has ContactFilter, and so on. Thus, you can deduce the filter name from that of the collection.

Most collection objects have a similar method call for populating and retrieving objects from them:

- GetContactById (singular) retrieves one Contact record from the database, based upon the ID parameter. This method does not populate the collection; rather, it returns the single object (if it exists in the database).
- GetContacts (plural) retrieves multiple Contacts. You can pass a p_lngMaxRecords parameter to restrict the amount of data returned from the filter, up to a maximum of 500 (that is, if you specify 10 and the filter finds 50, only 10 would be returned). The default returns all of the data specified by the filter.
- GetContactsPaged (plural) is identical to GetContacts in that it uses the filter to populate the collection, but this method will restrict the size of the collection. It also returns a reference so that this method can be called a second time and retrieve the next set of data. This paging works much like a web search engine, which displays only a subset of the results per page but provides links to get the next subset, and to the next. Keep requesting pages and testing the number returned; when the number is 0, there is no more data.
- GetContact (singular) retrieves one object from the collection, which must be populated first.

There is no parameter to pass an SQL WHERE clause to the GetContacts method. This would not only iBO restrict to certain flavors of SQL, but would also make it dependant upon table definitions and their relationships. Therefore, the collection is built upon the filter, which allows iBO to evolve and improve. Because of the abstraction of the filter, not only can table column names change without any recoding of the scripts that use iBO, but the column could be moved into another table, allowing for more normalization and optimization of the database schema.

Interface for Activity

These are the public classes in the Activity component. These classes should be used to read the database and should not be used to write to the database, as there is no validation on write operations. These classes are intended to be used by other IBO components.

Class	Used to...
CActivities	Retrieve one or more CActivity instances for viewing
CActivity	View one Activity record
CActivityBOAdmin	Used to instantiate CActivities, CActivity

Interface for Contacts

These are the public classes in the Contacts component:

Class	Used to...
CAddress	View or edit a contact's address entries
CContact	View or edit one Contact record
CContacts	Retrieve one or more Contact records for viewing or editing
CContactsBOAdmin	Used to instantiate CContacts, CContact, and CContMgmtConfig
CContMgmtConfig	Used to access system configuration values
CExtView, CExtField	Access the ExtView (Extended View) objects, which are the equivalent of iMIS Customizer Windows data Notes: • ExtView names reference windows (not tables), while ExtField names reference columns. • ExtField names are case-sensitive, even if the database instance is not.
CFinancialProfile	View or edit a contact's Name_Fin data
CNote	View or edit a contact's note entries

Interface for DataServer

These are the public classes in the DataServer component:

Class	Used to...

CFilter	Used to set the equivalent of an SQL WHERE or ORDER BY clause for retrieval from the database by a collection class

Interface for Errors

These are the public classes for the Errors component:

Class	Used to...
CError	iBO creates a CError instance when an error condition occurs
Cerrors	Collection of errors

Interface for e-Series

These are the public classes in the e-Series component:

Class	Used to...
CESeriesBOAdmin	Used to instantiate CESeriesIntegration and to Restore sessions state after a page turn
CESeriesIntegration	Used for ESeriesIntegration for subscriptions and standard orders, to convert an anonymous user to a member, and to serialize session state into an XML string

Interface for Events

These are the public classes in the Events component:

Class	Used to...
CBadge	View or set badge information
CEvent	View an event definition, including the function details
CEvents	Retrieve and access a filtered set of Event objects
CEventsBOAdmin	Retrieve an instance of an Events, Registrations, or Registration object

CEventsConfig	View system setup information for Events
CFunction	View a function definition, including fees details
CFunctionFee	View a fee definition
CRegistration	Create a new registration or view an existing registration
CRegistrations	Retrieve and access a filtered set of Registration objects
CRegLineItem	View or add a registered function (line item) for an event

Interface for Financials

These are the public classes in the Financials component:

Class	Used to...
CBatch	Used to view Batch records
Cbatches	Used to retrieve Batch records from the database
CFinancialEntities	Used to read Ord_Control rows into CFinancialEntity instances
CFinancialEntity	Used to view Org_Control data
CFinancialsBOAdmin	Used to instantiate CFinancialEntities, CFinancialsConfig, and CBatch
CFinancialsConfig	Used to view System_Params data

Interface for FundRaising

These are the public classes in the FundRaising component:

Class	Used to...
CFRDataMgr	Use to instantiate CGift
CGift	Use to make a simple donation

Interface for Orders

These are the public classes in the Orders component.

Class	Used to...
CKitItemOrderLine	View order line information that is part of a kit product
COrder	View or set order information pertaining to Event registration orders, including the Order Lines
COrderLine	View or set order line information pertaining to Event registration orders
COrders	Retrieve and access a filtered set of Order objects
COrdersBOAdmin	Retrieve an instance of an Orders, Order, Standard Orders, Standard Order, Kit Item Order Line, or Standard Order Line
COrdersConfig	View system setup information for Orders
CStdOrder	View or set Standard Order information, including the Standard Order Lines
CStdOrderLine	View or set Standard Order Line information, including Kit Item Order Lines
CStdOrders	Retrieve and access a filtered set of Standard Order objects

Interface for Products

These are the public classes in the Products component:

Class	Used to...
CBaseProduct	Provide a base location for properties common to many types of product objects
CDuesProduct	View Dues/Subscription product information
CDuesProducts	Retrieve and access a filtered list of Dues/Subscription products
CKit	Retrieve a set of Standard Products designated as a kit (sold as a single Standard Product)
CKitItem	View Standard Product information for a product that is a member of a kit
CProductBOAdmin	Retrieve an instance of a DuesProducts, Product Categories, or Standard Products object

CProductCategories	Retrieve a filtered list of Product Categories
CProductCategory	View Product Category information
CPublicationInfo	View Publication information for Standard Products marked as publications
CStdProduct	View Standard Product information, including Kit and Publication information
CStdProducts	Retrieve a filtered list of Standard Products

Interface for Subscriptions

These are the public classes in the Subscriptions component:

Class	Used to...
CSubscription	View or edit Subscription information
CSubscriptions	Retrieve a filtered list of Subscription objects. When used in conjunction with the Contact object, this class may also be used to create, bill, and pay new Subscription objects.
CSubscriptionsBOAdmin	Retrieve an instance of the Subscriptions or Subscription object
CSubscriptionsConfig	View system setup information for Subscriptions

Interface for SystemConfig

These are the public classes in the SystemConfig component:

Class	Used to...
CCashAccount	Used to view data on CashAccounts records
CCountry	Used to view data on Country_Name records
CMemberType	Used to view data on Member_Type records
CSubscriptionDef	Used to view data on the dues subscription products for a member type

CSysCfgBOAdmin	Used to instantiate CSystemConfig
CSystemConfig	Used to view System_Params and Gen_Tables, and to retrieve CCashAccount, CCountry, CMemberType, CSystemParams, and CTaxAuthorities
CSystemParams	Used to view data on System_Params records
CTaxAuthorities	Collection of related CTaxAuthority instances
CTaxAuthority	Used to view data on Products records with PROD_TYPE = 'TAX'

Interface for UserSecurity

These are the public classes in the UserSecurity component:

Class	Used to...
CUser	Contains data on the user who is logged on

Development Guide

Installing iBO

Requirements

Supported Environments

This release supports the following environments:

- iMIS database version 10.5 or greater
- Microsoft ActiveX® Data Objects (ADO) transactions
- Microsoft SQL Server (not Sybase), versions 2000 and 7.0
- Microsoft Windows 2000 SP2, Windows XP
- Microsoft Internet Information Services (IIS) 5.x and COM+

Supported Languages

The iMIS Business Objects work with many languages, but they are validated for use and supported only with these:

- Macromedia ColdFusion
- Microsoft Visual Basic Script (VBScript)
- JavaScript (from Netscape and Sun Microsystems)
- Microsoft JScript
- Microsoft Visual Basic
- Microsoft Active Server Pages (ASP)

Firewall Configuration

OLEDB uses port 1433 for TCP/IP. SQL Server listens on port 1433 for default instances of SQL Server. Named instances of SQL Server 2000 dynamically assign a port number.

Use the Server Network Utility to configure a specific port for SQL 2000 to listen on, and then set the firewall to allow that port.

Microsoft's knowledge base article 287932 (http://support.microsoft.com/default.aspx?scid=kb;en-us;q287932) describes SQL Server and firewall configuration.

Remote Database Access

To access your database remotely (over the Internet) with iBO, use a Virtual Private Network. Ensure that the DSName referencing the SQL Server uses the server's name and not its IP address.

Installing iBO on the Client

1. Contact ASI to obtain a license key for iBO.
2. Upgrade the iMIS license keys for iBO.
3. Upgrade your database to the latest version of iMIS.

4. Remove prior versions of iBO before running the iMIS installer: Start > Control Panel, Add or Remove Programs.
5. Insert the iMIS Server CD and run Setup.exe.
6. Select Install Products.
7. Select Server.
8. Select Install iBO.
9. Select Next when the InstallShield Wizard window displays.
10. Select Next to install to the default directory or Browse to select another.

    Note: Do not rename this directory or any subdirectories after installation, or future upgrades will not run properly.
11. Select Next.
12. After iBO is installed, select Finish.
13. In iMIS, update the SQL logins: Select File > System Setup, select User Passwords, and select Update All SQL Logins.

    Note: If you do not update SQL logins before running a custom iBO application, you may receive error 3261 or an error indicating that the database cannot be accessed; run the update to correct this.

    iBO Installed Files

    These files are included an iBO installation (directory paths are relative to the main iBO installation directory):

<root>	readme.txt	Release info; finding documentation

\bin	iboAccounting.dll	Component handling Accounting
	bioactivity.dll	Component handling Activities
	iboBOInterfaces.dll	Component handling BOInterfaces
	iboContactManagement.dll	Component handling Contacts
	iboDataServer.dll	Component handling database access
	iboErrors.dll	Component handling errors
	iboESeries.dll	Component handling e-Series
	iboEvents.dll	Component handling Events/Registrations
	iboFinancials.dll	Component handling Financials
	iboFundRaising.dll	Component handling Fundraising
	iboOrders.dll	Component handling Orders
	iboProducts.dll	Component handling Products
	iboSubscriptions.dll	Component handling Subscriptions
	iboSystemConfig.dll	Component handling system configuration
	iboTranslate.dll	Component handling translation
	iboUserSecurity.dll	Component handling user security
	iboXMLUtilities.dll	Component handling XML utilities
\Samples	\EventsDemo	Sample implementation, in ASP
	\FundRaisingDemo	Sample implementations, in ASP, VB, and ColdFusion
	\OrdersDemo	Sample implementation in ColdFusion
	\VBTestClient	Sample Visual Basic test client
\Source	iboEnums_ColdFusion.cfm	ColdFusion code defining constants used to specify filters when retrieving data
	iboEnums_Javascript.asp	JavaScript code defining constants used to specify filters when retrieving data
	iboEnums_VBScript.asp	VBScript code defining constants used to specify filters when retrieving data

Configuring iMIS System Setup

As a rule, system options that are set in the iMIS environment for iBO are also enforced by the iBO system.

This table lists the setup options, with explanations of how iBO is affected.

ID Assignment	Auto Assign Member Numbers	If enabled, iBO uses the same counter to generate new ID values for iBO Contacts and returns an error if an ID is passed into the new contact
Standard Fields	Institute Type, Major Key Prompt	Available as CContMgmtConfig interface properties; Institute Type is the 'InstitutePrompt' property
	Preferred Sort Order	Not applicable
	Must be Unique	Applicable when a CContact record is entered or modified via iBO
	Flow from ID	If enabled, when ID is set, MajorKey is automatically set to the same value
	Prefixes in Full Name	Any prefixes in this list are used in constructing the FullName field value upon saving.
AR/Cash	Multiple Entities	If enabled, multiple entities are supported, including multiple entities at the product level
Chapters	Chapter Prompt	Available as a CContMgmtConfig interface property
	Group[x] prompts	Not applicable
Customers	Home Phone Flow from/to Phone Number at Address	Specifies the mapping for Home Phone
	Work Phone	Specifies the mapping for Work Phone

	Flow from/to Phone Number at Address	
	Fax Number	Specifies the mapping for Fax
	Flow from/to Fax Number at Address	
	E-mail Flow from/to E-mail at Address	Specifies the mapping for E-mail
Options	Use Bill Categories	Visible via the CContMgmtConfig interface as a property of the CContact object, regardless of this setting.
	Use Functional Title	Visible via the CContMgmtConfig interface as a property of the CContact object, regardless of this setting.
	Force Source Coding	Visible via the CContMgmtConfig interface; no impact otherwise.
	Use Birth Date	Visible via the CContMgmtConfig interface as a property of the CContact object, regardless of this setting.
	Prompt for Status Date	Not applicable The value is available via the CContMgmtConfig interface.
	Allow Delete from Palette	Not applicable
	Require Gender	Setting to True causes validation to fail if the CContact.Gender property is not set.
Address Usage	Main, 2nd, and 3rd address prompts	Available via the CContMgmtConfig interface.
	Use Company	Not applicable
	Use Title	Not applicable

	Use to Update Chapter	Not applicable
International Prompts		These prompts will be available via the CContMgmtConfig interface.
Zip Options		Not applicable
Address Codes		These settings will be available via the CContMgmtConfig interface.
Note Prompts		These prompts will be available via the CContMgmtConfig interface.
Accumail Options		Not applicable
Indexes		These fields are added to the Search Types on the Member Find window. If a CContact is inserted/updated, the appropriate index table must be updated to enable this lookup. iBO updates these as needed.
Change Logging		Not applicable iBO automatically logs changes to any CContact property as if they were listed in the Change Logging fields list.
Advanced	Disable Auto Flow down of company address information	Toggles whether address information flows down automatically upon CContact edit
	Use Parent Company Pricing	Does not affect the Contacts component, but affects the pricing of registrations in iBO Events
Access Keys		No access keys are used by iBO in this release.
Events	Warning For	If set to True, causes a warning to be returned if a regis-

Max Registrants	tration is created for an Event that is full.

API documentation

Accessing API Help

For API reference documentation, use the HTML Help file, iBO_API.chm.

Finding documentation

The latest version is always available on the iMIS Helpsite (iMIS Helpsite - http://-docs.imis.com):

Release news, installation notes, resolved issues	iMIS Release Kit: Installation (15-1_iMIS_Installation_Guide.-doc) and New_Features (15-1_iMIS_New_Features.doc)
Concepts, usage, references, samples	e-Series Reference (15-1_iMIS_Reference_e-Series.doc)
Complete API Reference	iBO_API.chm, compiled HTML Help
Current Known Issues (as tracked in our database)	Log in to the Support (http://advsol.com/support) page, select Search, specify Area: Known Issues

Prior documentation and resources reside in the Document Archives of the HelpNet Community (Release Materials and iBO folders) on ASI's website.

iBO filters

The CFilter object lets you specify the rows to be returned or modified. The CFilter Translate method returns conditions that you can place in a WHERE clause. It generates join conditions automatically, so you do not need to include them in the CFilter.

Types of filters

There are two types of filters: atomic and compound.

- Atomic filters specify a single condition, such as ZCContacts_CContact.County, "TRAVIS", efilEqual

- Compound filters have two or more atomic filters joined by a Boolean operator (AND , OR, etc.).

  How filters work

  Outside of a component, CFilters are defined in terms of properties in the encapsulating component's interface, rather than in terms of columns in a table. This approach helps to preserve schema encapsulation.

  A component can select rows within its encapsulated tables using joins on tables that it does not encapsulate.

  For a compound CFilter, AND is the assumed Operator if none is specified. If you call the AddFilter method on a CFilter that already has its properties set, the following happens:

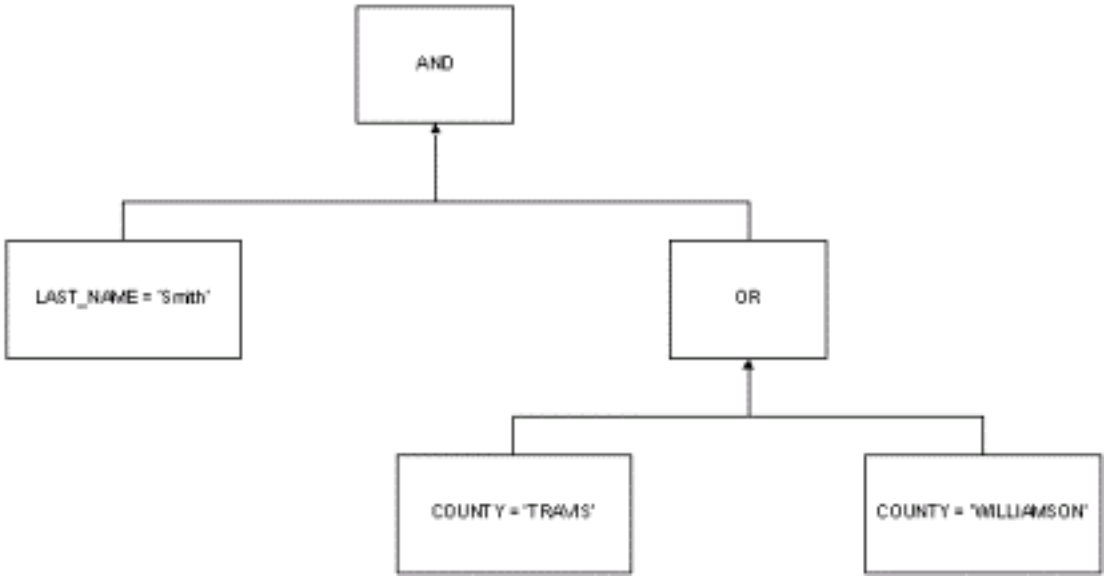
- The CFilter is converted to a compound AND CFilter.
- The existing filter is added to the new compound filter.
- A new CFilter instance is created using the passed values.
- The new instance is added to the compound filter.

  Filter example

  The following example shows how a filter is created:

  WHERE (Name.LAST_NAME = 'Smith') AND ((Name.COUNTY = 'TRAVIS') OR (Name.COUNTY = 'WILLIAMSON'))

  The best way to model the Where clause is using a hierarchical tree, with the Operator representing a compound filter and the SQL condition representing the atomic filter:



Visualizing the structure of a filter

You would write the following calls to create this filter:

```
Set filFilter = New CFilter

' make the filter a compound AND filter
filFilter.Operator = efilAnd

' create an atomic filter in the compound AND filter
Call filFilter.AddFilter (ZCContacts_CContact.LastName, "Smith”, efilEqual)

' create a compound OR filter within the compound AND filter
Set filCounty = filFilter.AppendFilter(efilOr)

' create the two atomic filters within the compound OR filter
Call filCounty.AddFilter(ZCContacts_CContact.County, "TRAVIS", efilEqual)
```

```
Call filCounty.AddFilter(ZCContacts_CContact.County, "WILLIAMSON", efilEqual)
```

When to add joins

The DataServer uses inner joins when columns from more than one table are involved in a DataRequest. When the tables involved in a DataRequest are all encapsulated by the same component, the join is IntraComponent; when the tables are encapsulated by two or more components, the join is InterComponent.

The DataServer handles IntraComponent joins without help. It can create inner joins between all of the tables encapsulated by a component. For such joins, there is no special processing required: Use CFilter.AddJoin to specify which rows to select.

However, the DataServer does need help with InterComponent joins, which involve multiple components. You use the CFilter.AddJoin method to tell the DataServer which properties in each component to use to build the inner join. The DataServer associates one or more inner join clauses with each combination of two properties. The following InterComponent joins are supported:

- iboContactManagement.CContact.ContactID = iboOrders.COrder.ShipToID
- iboContactManagement.CContact.ContactID = iboEvents.CRegistration.RegistrantID
- iboOrders.COrderLine.ProductCode = iboEvents.CFunction.FunctionCode
- iboOrders.COrder.OrderNum = iboEvents.CRegistration.OrderNum

These InterComponent joins let you relate iboContactManagement, iboEvents, and iboOrders. The DataServer requires the help of the CFilter.AddJoin because there are several possible ways to relate iboOrders to iboEvents.

Example: Adding a join

```
Sub addJoinTest()

    Dim mystring As String

    Dim i As Long

' Example: AddJoin filters -- finds all contacts registered for an event.
```

```
' All events with EventCode <> 0
m_objContacts.ContactFilter.AddFilter ZiboEvents_CRegistration.EventCode, _
”0", efilNotEqual
   If handleError(m_objContacts) Then Exit Sub

   ' All contacts with a contactId > 0
m_objContacts.ContactFilter.AddFilter ZiboContactManagement_CContact.contactID, _
"0", efilGT
   If handleError(m_objContacts) Then Exit Sub

' Join the Contacts object and the Registrations object on the ContactID key
m_objContacts.ContactFilter.AddJoin _
ZiboContactManagement_CContact.contactID, _
ZiboEvents_CRegistration.registrantID
   If handleError(m_objContacts) Then Exit Sub

   ' Get all matching contacts
   m_objContacts.GetContacts True, 0
   If handleError(m_objContacts) Then Exit Sub
   For i = 1 To m_objContacts.count
      Set m_objContact = m_objContacts.GetContact(i)
      If handleError(m_objContacts) Then Exit Sub
mystring = mystring & m_objContact.contactID & ";"
   Next i
```

```
    MsgBox "count=" & m_objContacts.count & vbCrLf & mystring
End Sub
```

Enumerator constants for filters

The \Source folder contains several different scripting language files that define the constants you will use to specify filters when retrieving data:

- iboEnums_ColdFusion.cfm (ColdFusion code)
- iboEnums_Javascript.asp (Javascript code)
- iboEnums_VBScript.asp (VBScript code)

These scripting language files are located in the Source folder in the iBO installation folder. The e-Series installation process automatically copies the ColdFusion scripting language files to the correct folder (the Customer/Source folder used by e-Series) for use with e-Series. The scripting language files should be copied to the Web Application folder for ColdFusion applications that do not rely on e-Series and for non-ColdFusion applications.

You should include the following line of code in every iBO page or in the Application.cfm file for the application:

```
<CFInclude \ template="../Source/iboEnums_ColdFusion.cfm">
```

The following table lists some of the iBO enumerator constants for component filters. For a listing of all iBO enumerator constants, you can refer to the iboEnums_ColdFusion.cfm, iboEnums_Javascript.asp, or iboEnums_VBScript.asp files, look up the table, and then find the column under the table.

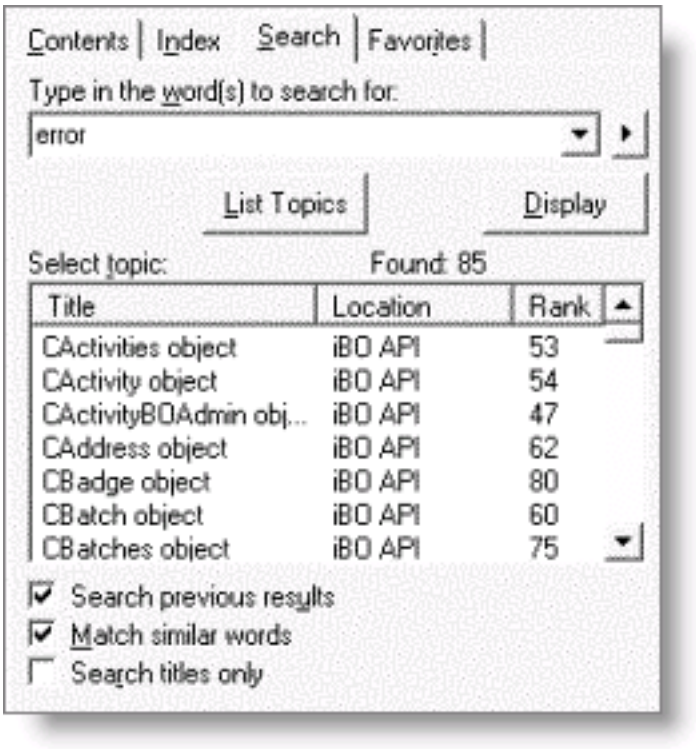
Use with iboDataServer.CFilter.Comparison	Const efilEqual
	Const efilNotEqual
	Const efilGT
	Const efilLT
	Const efilContains
	Const efilBeginsWith
Use with iboDataServer.CFilter.Operator	Const efilAnd
	Const efilOr
	Const efilAtomic

Finding Help topics

The HTML Help offers three main ways to locate information:

1. Using the Contents tab, browse the hierarchical structure of the help topics, clicking book icons to expand and collapse subtopics. This is most helpful when you want to explore the information from the top down.
2. Using the Index tab, enter a keyword, select Display, and browse the topic titles that matched the keyword you specified. This is a fast way to find the primary topics for a known item, such as a particular method.

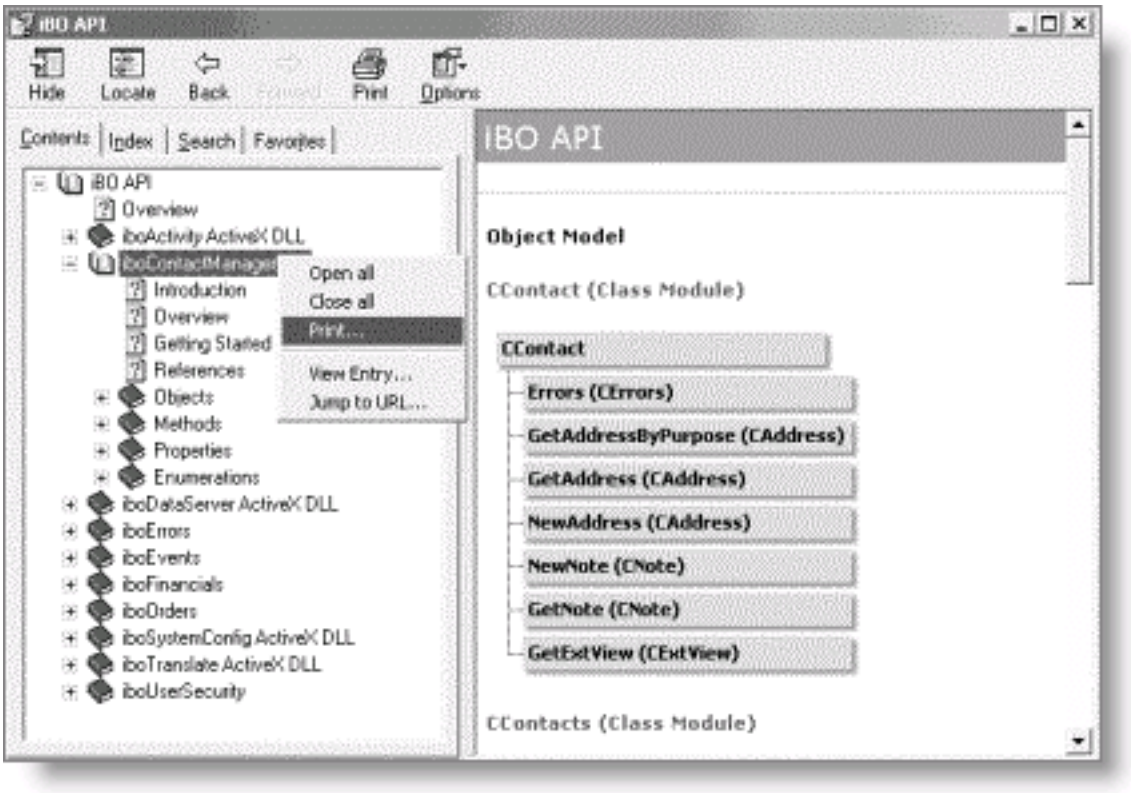
   Tip: Having opened your topic, you can select the Locate button on the toolbar to open the Contents to your topic's hierarchical location.
3. Using the Search tab, enter a search string, select List Topics, and browse the results that are returned. By clicking the table headings (Title, Location, Rank), you can sort the results to help you identify likely candidates. If you get too many results, you can do a sub-search by enabling the Search previous results checkbox or restrict searching to Search titles only:



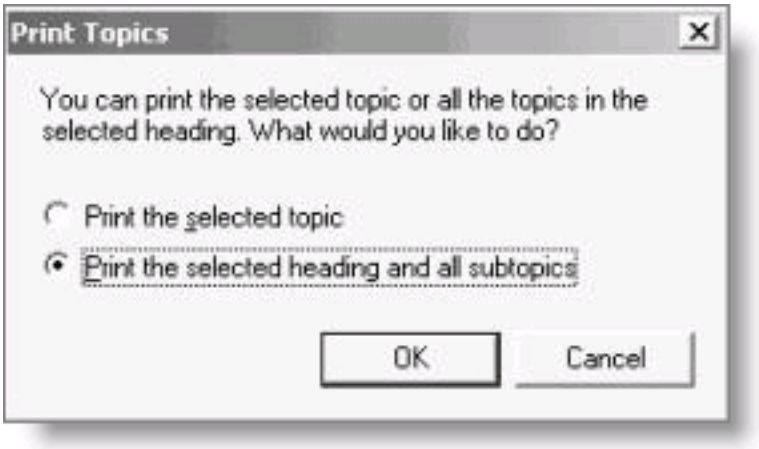
When you find a topic of interest, double-select it or select Display.

Printing topics

To print the complete documentation on a given component or object, select its folder (book icon) in the Contents pane and select Print on either the toolbar or the context menu:



Specify that you want to print the heading and its subtopics:



Development environments and deliverables

ColdFusion versus ASP scripting

ColdFusion supports the use of COM objects, including iBO. Because ColdFusion is the webserver technology underlying e-Series, it simplifies your environment to use

ColdFusion for your custom e-Series pages.

ASP (Active Server Pages) is Microsoft's webserver scripting language. When considering ASP, be aware that you might find it harder to integrate custom e-Series pages with ASP than with ColdFusion.

Note: To implement ASP code, you must make minor changes to your e-Series source code. Contact ASI Consulting if you are interested in attempting an ASP implementation.

These are examples of how you will simplify your tasks by choosing to script in ColdFusion:

- You can keep the top, side, and bottom indexes synchronized with the rest of e-Series with no additional effort if the scripting language you use is ColdFusion.
- If you are going to save meeting registrations to the e-Series checkout basket, you must run a ColdFusion script to retrieve certain ColdFusion client-processing variables that are required by the e-Series checkout basket.

  Note: With any scripting technology, you can edit the files with Notepad or any editor that can save plain text files.

Prototyping in Visual Basic

The fundamental problem with developing applications using current webserver technology is the lack of a robust debugger. Visual Basic version 6 has good debugger, and it has an object browser that presents all of COM components in a summary form.

There are many practical benefits to prototyping your applications in Visual Basic and using its debugger:

- You can easily identify all of each iBO object's methods and properties, including their current values.
- You can change an object's properties.
- You can drill down to child object methods and views.
- You can re-execute code after errors are encountered.

These features can greatly reduce your coding time, so much so that it may take you less time to create a prototype VB application that mirrors the web process exactly (in terms of iBO use) than it would take you to then port it over to the webserver technology.

Avoid creating ActiveX controls

It is technically possible to create ActiveX controls using iBO. Nevertheless, ASI does not recommend the use of ActiveX controls for widespread use on a website, due to security issues and other complications. However, you may find ActiveX controls beneficial for use in an intranet environment.

Unsupported formats: Xtenders, VB.NET

ASI will not support Xtender applications that use iBO.

ASI has not tested iBO with VB.NET and therefore cannot support custom iBO e-Series solutions that use it.

Managing the state of web sessions

By convention, iBO provides two methods on all business objects: GetXML() and LoadXML(). You can use these methods in your client web application for session state management, if desired.

- GetXML() returns an XML string, which comprises a snapshot of the object at a point in time (including any modifications of properties, etc., that have occurred).

  If the client application stores this string along with a session ID, it may be retrieved on a subsequent page, a blank object instantiated (by calling New*() - NewContact() for instance, with the initialize parameter set to False), and a call made to LoadXML(), passing in the XML string.

  To avoid getting unpredictable results when calling LoadXML(), do not modify the string returned from GetXML().

- LoadXML() populates the object to the state it was in when the call was made to GetXML () on the previous page.

Error handling guide

Each class interface has two error properties:

- ErrorsCount
- Errors

You can call ErrorsCount at any time to check for error conditions. Errors returns an instance of the iboErrors object.

Processing Errors

```
Dim errErrors  as CErrors

Dim errError as CError

Dim i as long

Step 1: Get the primary (last) error message:

Call objBO.Method

If not objBO.ErrorsCount = 0 then

   Set errErrors = objBO.Errors

   Msgbox "Error description " & errErrors.GetErrorMessage

   objBO.ClearErrors

End if
```

After dealing with an error, clear the CErrors instance.

```
Step 2: Iterate through all error messages:

Call objBO.Method

If not objBO.ErrorsCount = 0 then

   Set errErrors = objBO.Errors

   For i = 1 to errErrors.Count
```

```
    Set errError = errErrors.GetError(i)

    Msgbox "Error number " & errError.Number & ", " & _errError.Message & ", " & errError.Category & ", " & errError.Location

  Next i

  objBO.ClearErrors

End if
```

After dealing with an error, clear the CErrors instance.

objBO will return without processing whenever objBO.ErrorsCount is not zero.

Using a General Error Handling Procedure

The amount of code you would write to handle errors could exceed that of your iBO-related code itself if you do not use a general procedure to handle the errors. We use “general” to suggest reusability.

There are many ways of exposing a general procedure to handle iBO errors. Several ways are listed above. Which method is appropriate for you depends on the nature of your project.

To handle errors in Visual Basic

We recommend using VB to prototype applications, and you will find it most efficient to put the generic error handling routine in a VB module (.BAS). You can include the single .BAS file in all iBO-related projects, which drastically cuts down the time required to setup the iBO inline error/status checking. Following is an example of such a module:

```
Option Explicit

Public Function handleError(ByVal p_object As Object) As Boolean

Dim errErrors As iboErrors.CErrors

Dim errError As iboErrors.CError

Dim i As Long
```

```
handleError = True
On Error GoTo ErrorHandler
If p_object Is Nothing Then
printDebugMsg "Could not instantiate iBO object."
Else
If p_object.ErrorsCount > 0 Then
Set errErrors = p_object.Errors
For i = 1 To errErrors.Count
Set errError = errErrors.GetError(i)
printDebugMsg "Error #: " and errError.Number _
and "; " and errError.Message _
and "; Location: " and errError.Location
Next i
errErrors.ClearErrors
Else
handleError = False
End If
End If
Exit Function
ErrorHandler:
printDebugMsg "exception in iBO Error Handler"
End Function
```

```
Private Sub printDebugMsg(p_string As String)

Debug.Print p_string

MsgBox p_string, vbCritical, "iBO Error"

End Sub
```

This function does several things:

- Assumes failure
- Checks to make sure iBO was even instantiated
- Reports every error, not just the first one
- Clears the iBO object's Errors object
- Reports runtime errors encountered trying to report the errors
- Reports success only after verified error free

Further, this function can be modified in one place. If a change in the way errors are to be formatted to the user changes, then the code does not have to be pasted all over the rest of the project. Also note that besides displaying the error in a MsgBox, it will also print the error to the VB debugger's 'Immediate' window, so there is an audit trail of the errors generated.

This is how simple the code can become after implementing this .BAS file with this global procedure:

```
On Error GoTo fatal_err:

'This call will create a registration with auto-enroll on

Set reg = cbo.NewRegistration(CUser, _

"ANNUAL", "101", True, True, True, True)

If handleError(cbo) Then

   Exit Sub
```

```
End If

'If only auto-enroll and then goto checkout basket are required, SubmitChanges() save it to basket

reg.SubmitChanges

If handleError(reg) Then

   Exit Sub

End If

Exit Sub

fatal_err:

MsgBox Err.Description
```

Notice that the entire iBO object is passed to the error-handling routine. This alleviates having a thorough knowledge of the error handling by all programmers involved in the iBO projects. The benefit of this is to allow for less technical analysts to prototype the e-Series customization, and let the technical web programmer craft the finished solution.

To handle errors in ColdFusion

You can create a global error handling routine in ColdFusion using the <CFINCLUDE> tag. However, the error handling when scripting on a webserver cannot be as simple as the VB prototype. In the VB prototype, you simply report the error and stop; in the web-server script, the web page must be completed regardless. Leaving an error message on a half-drawn web page is not comforting to the end user. If the processing is being done in an included script, that script could be aborted, but still the error must be propagated up to the script that is drawing the page.

Despite the additional work required, you have much to gain from using a generalized procedure, such as follows:

```
<CFSET errMessage="">

<CFIF PARAMETEREXISTS(errErrors) EQ "NO">
```

```
<CFSET errMessage="Could not instantiate iBO object.">
<CFELSE>
<CFIF errErrors.Count GT 0 >
<CFSET errMessage="">
<CFLOOP INDEX="i" FROM ="1" To = "#errErrors.Count#">
<CFSET errError = errErrors.GetError(i)>
<CFSET errMessage="iBO Error #errError.Number#;
#errError.Message#;
Location: #errError.Location#<BR>">
</CFLOOP>
<CFSET blnResult = errErrors.ClearErrors()>
</CFIF>
</CFIF>
<CFIF errMessage GT "">
<CFPARAM NAME="CLIENT.ID" DEFAULT="">
<CFFILE ACTION="Append"
FILE="C:\e440\iBOErrors.txt"
OUTPUT="#Now()# IP=#CGI.REMOTE_ADDR# iMIS ID=#CLIENT.ID#
#errMessage#"
ADDNEWLINE="YES">
</CFIF>
```

Besides looping through all of the errors, putting them in one string, and clearing the Errors object, this procedure reports the error to a text file so that the webmaster can

review what iBO errors have been generated through live usage. The following are included:

- The IP address, to help identify anonymous users
- The iMIS ID (if the user logged into e-Series)
- The date/timestamp of the occurrence
- The actual error

The following example shows how to properly invoke this global error procedure in the ColdFusion script:

```
<!---This call will create a registration with auto-enroll on--->
<CFSET reg = cbo.NewRegistration(CUser,"ANNUAL",
"#CLIENT.ID#",True,True,True,True)>
<CFSET errErrors = cbo.Errors>
<CFINCLUDE TEMPLATE="iBOHandleErrors.cfm">
<CFIF errMessage GT "">
<P><FONT size="3" color="red"><CFOUTPUT>
#errMessage#
</CFOUTPUT></FONT></P>
<CFELSE>
<!---If auto-enroll and then goto checkout basket --->
<CFSET blnResult = reg.SubmitChanges()>
<CFSET errErrors = reg.Errors>
<CFINCLUDE TEMPLATE="iBOHandleErrors.cfm">
<CFIF errMessage GT "">
<P><FONT size="3" color="red"><CFOUTPUT>
```

#errMessage#

</CFOUTPUT></FONT></P>

</CFIF>

</CFIF>

The ColdFusion global procedure requires more coding than in VB. The error object cannot be passed as a parameter, but must be 'set' before the global script is 'included'. Though the global script could output the error, it would then output the error for every script. This may or may not be appropriate for every web page. For instance, if the processing was done before the <HTML> tag was issued, the error will be wiped out when the real web page starts. If the error occurred when the processing was to draw a number in a narrowly defined table column, the output could be a few characters per line over dozens of lines, which would look strange.

Note: In this example, every iBO method call causes the IF statements to nest another level deeper. Although indenting for this will cause your script to scroll far to the right, it is the best way of resolving the end of each IF statement.

You must take special care when using the <CFINCLUDE> tag, because paths presented in the TEMPLATE are relative to the script that calls the include. /ScriptContent is the easiest place to put iBOHandleErrors.cfm because, if your calling script is also in that folder, you can avoid specifying the path. If your calling script is in the /Source/Meetings/ folder, then the relative path you would use is "../../ScriptContent/". This relative path is also kept in the ColdFusion variable CLIENT.CLIENTPATH.

iBO Error messages

Enum EIBOErrNumber

' Maximum resource ID is 65,000

' General Error Numbers

eGenUnknownError
1000
Unknown error. %1

eGenItemNotFound
1001
Item not found. %1

eGenSAXParsingError
1002
Error in XML. %1

eGenDateFormatError
1003
Date is invalid. Please format as MM/DD/YYYY or MM/DD/YYYY hh:mm:ss. %1

eGenInvalidParameterError
1004
Invalid parameter. %1

eGenUnsupportedFunctionality
1005
Function is not supported. %1

eGenGeneralError
1006
General error. %1

eGenItemExists
1007
Item exists. %1

eGenItemDoesNotExist
1008
Item does not exist. %1

eGenErrorExists
1009
Error exists from previous call; request not processed.

' iboContactManagement error numbers start at 1300
(1000 + (300 * Component Enum)

eContInvalidAddress
1300
Invalid Address entry. %1

eContInvalidContact
1301
Invalid Contact entry. %1

' iboEvents error numbers start at 1600

eEvtsMaxRegistrantsExceeded
1600
Warning: The maximum number of registrants for the event has been exceeded.

eEvtsDuplicateRegistration
1601
That contact is already registered for the selected event.

eEvtsInvalidFunctionCode
1602
[%1] is not a valid function code for the event.

eEvtsNoPricingForRegClass
1603
No pricing is defined for function: %1, for the selected registrant class.

eEvtsBatchNumberRequired
1604
Batch control is turned on. A batch number is required for the registration.

eEvtsNoLineItems
1605
There are no line items for this registration.

' iboActivity error numbers start at 1900

' iboOrders error numbers start at 2200

' iboUserSecurity error numbers start at 2500

eUsrInvalidUser
2500
Invalid User entry. %1

eUsrCantHashPassword
2501
Error hashing password.

' iboFinancials error numbers start at 2800

eFinInvalidCCNumber
2800
Invalid credit card number %1.

eFinInvalidCardName
2801
Credit card holder name is required.

eFinExpiredCard
2802
Credit card has expired.

eFinInvalidCardType
2803
Invalid credit card type %1.

' iboErrors error numbers start at 3100

eErrErrorNumberInvalid
3100
Error number %1 is invalid. Calling method is %2.

eErrDescriptionValue
3101
Value of description parameter is

eErrUnavailable
3102
Unavailable

' iboDataServer will use numbers assigned to iboErrors

' These messages are also used by the methods in the CTranslate Class in each BO

eDsvReadNoTransaction
3200
Connection Type is "Read" and Commit Type is not "NoTransaction". This combination is invalid

eDsvWriteNoTransaction
3201
Connection Type is "Write" and Commit Type is "NoTransaction". This combination is invalid

eDsvConnectionAlreadyOpen
3202
Can't open a connection which is already open."

eDsvConnectionAlreadyClosed
3203
Can't close a connection which is already closed."

eDsvInvalidProperty

3204

Property %2 in interface %1 is invalid.

eDsvInvalidTranslatedColumn

3205

Translated column %1 is invalid for component %2 interface %3 property %4

eDsvInvalidTable

3206

Table %1 is invalid. Component is %2.

eDsvInvalidRealColumn

3207

Real column %1 is invalid. Virtual column name is %2 in table %3.

eDsvInvalidColumn

3208

Column %1 in Table %2 is invalid.

eDsvInvalidComponent

3209

Component %1 is invalid.

eDsvCantGetTranslateInterface

3210

Column or property %1 is invalid. Parsed to component %2 table/interface %3 column/property index %4

eDsvInvalidColumnProperty

3211

Property/Column %1 is invalid."

eDsvInvalidFilter

3212

Filter is invalid.

eDsvErrGeneratingSQLStatement

3213

Error generating SQL statement.

eDsvInvalidFilterOperator

3214

Filter operator is invalid; must be EfilOperator.efilAnd or efilOr.

eDsvInvalidInterComponentJoinIndex

3215

Join index %1 on Property %2 and %3 in invalid.

eDsvErrorCombiningJoinArrays

3216

Error occurred while combining JoinArrays.

eDsvFilterNotInitialized

3217

Filter has not been initialized.

eDsvAllColumnsInvalidInFilter

3218

ZAllColumns is not valid for use in a Filter.

eDsvInvalidFilterComparison

3219

Filter comparison is invalid.

eDsvInvalidInterface

3220

Interface %1 in Component %2 is invalid.

eDsvPropertyNotInComponent

3221

Property %1 is not in Component %2.

eDsvPropertyIndexNotInInterface

3222

Property Index %1 in interface %2 is not in component %3.

eDsvJoinInvalidInComponent

3223

Join of Table %1 to Table %2 in Component %3 is invalid.

eDsvInvalidIntraComponentJoinIndex

3224

IntraComponent Join Index %1 is invalid in Component %2.

eDsvInvalidInterComponentPropertyJoinIndex

3225

InterComponent Property Join Index %1 is invalid in Component %2.

eDsvTranslatedColumnFilterInvalid

3226

Can't translate Column Filter translated from a Property Filter.

eDsvErrorTranslatingVirtualColumn

3227

Error occurred while translating Virtual Column %1 for Real Column %2.

eDsvErrorAddingTableToCollection

3228

Error adding Table %1 to collection.

eDsvErrorTranslatingColumn

3229

Error occurred while translating Column %1.

eDsvInvalidColumnPropertyType

3230

ColumnProperty Type of Column %1 is invalid.

eDsvErrorOpeningConnection

3231

Error opening connection.

eDsvErrorInitializingRecordset

3232

Error initializing recordset.

eDsvErrorClosingConnection

3233

Error closing connection.

eDsvErrorUpdatingTableList

3234

Error updating table list for inter component joins.

eDsvErrorCreatingJoinArray

3235

Error creating intra component join array.

eDsvErrorJoinRequiredForMultipleTables

3236

Error generating FROM SQL clause. Fields have been requested from multiple tables but joins have not been specified. CFilter.AddJoin must be called for inter component joins.

eDsvErrorSQLUpdateColumnsNotSet

3237

Error generating SQL Update statement. The SetValue method must be called for the TimeStamp column and at least one other column.

eDsvSetValueEnumNotColumn

3238

SetValues was called with an enum value of %1 which does not represent a column.

eDsvZAllColumnsNotValid

3239

SetValues/SortList was passed ZAllColumns as an Enum. This is not valid.

eDsvVirtualColumnsInvalid

3240

Column %1 is virtual; virtual columns are not allowed in a SQL Update/Insert statement.

eDsvSetValuesColumnsFromMultipleTables

3241

SetValues can not be passed columns from more than one table.

eDsvInvalidBoolean

3242

Column %1 is Boolean. Value must be "TRUE" or "FALSE"

eDsvFilterRequired

3243

SQL Update/Delete statement requires a Filter which identifies the row to modify.

eDsvMultipleTablesNotAllowed

3244

SQL Update/Insert statement can't reference more than one table.

eDsvTimeStampRequired

3245

TimeStamp column must be set for Update and Delete SQL statements.

eDsvErrorSQLInsertColumnsNotSet

3246

Error generating SQL Insert statement. The SetValue method must be called for at least one column.

eDsvTimeStampNotAllowed

3247

The TimeStamp column can't be specified in a SetValue call for a SQL Insert statement.

eDsvInvalidConnectionTypeForModify

3248

The connection type must be "Write" when updating the database.

eDsvInsertError
3249
Row was not inserted.

eDsvInvalidParmList
3250
Parameter list must contain pairs of Column Enum and Ascending/Descending Enum.

eDsvADONoCurrentRow
3251
GetValues called when there are no values. ExecSelect may not have returned any rows, EOF may have been reached via a Move call.

eDsvColumnNotInSelectList
3252
Column %1 requested by GetValues does not appear in Select List; use SetSelectList to specify the column before calling ExecSelect.

eDsvInvalidJoinArray
3253
Invalid join array; unable to generate SQL FROM clause.

eDsvJoinInvalid
3254
Join of Table %1 to Table %2 is invalid.

eDsvInvalidDataSource
3255
Invalid DataSource %1. DataSource name must start with literal "ODBC:"

eDsvErrorTableNotInJoin
3256
Error generating FROM SQL clause. Table %1 does not participate in a join. CFilter.AddJoin must be called for inter component joins.

eDsvInvalidMaxRecords

3257

Maximum number of records must be greater than 0.

eDsvNoTablesSpecified

3258

There are no tables specified in the SQL statement. Use CFilter.AddFilter, SetSelectList, SetValues or SetOrderList to specify a table.

eDsvAsiGopherFailure

3259

Unable to access database using ASIGOPHER login for DSN %1.

eDsvLoginPasswordNotSet

3260

The System_Params value for IBO_Control.Access has not been set in database %1

eDsvAccessSystemParamInvalid

3261

The System_Params value for IBO_Control.Access is invalid in database %1.

eDsvUnableToAccessDatabase

3262

Database %1 can't be accessed by IBO.

eDsvLicenseStringNotSet

3263

The System_Params value for System_Control.LicensedProducts has not been set in database %1

eDsvNotLicensed

3264

Database %1 is not licensed for the requested operation.

eDsvWriteConnectionRequired

3265

%1 requires a ConnectionType of eWrite.

eDsvStoredProcedureMissing

3266

The stored procedure %1 is missing from database %2.

eDsvRecordsetNotOpen

3267

Recordset must be open before calling %1.

eDsvConnectionNotInitialized

3268

InitConnection must be called to initialize a connection before any other methods are called.

eDsvSqlStatementError

3269

Error generating SQL statement %1

eDsvNoColumnsInSelect

3270

One or more columns must be specified using SetSelectList before calling ExecSelect.

eDsvInvalidSQLDataType

3271

This property can't be used with the efilGT or efilLT operators. This property translates to a SQL text, ntext, or image data type.

eDsvCantInitIboCrypto

3272

Unable to initialize cryptography component for DSName %1

Integration Guide

e-Series Integration

IBOGuest ContactID

All operations prior to CContact.SubmitChanges can be performed as IBOGuest. e-Series can be used to put products in the basket, and you can use iBO to add items to CStdOrder, add address and security information, set the member type, and create and bill subscriptions. GetXML and Restore can be called repeatedly as needed to transfer OrderLines to e-Series and back to iBO.

SubmitChanges cannot be called on IBOGuest, and you cannot call SaveToESeriesBasket before calling SubmitChanges since every row in the Basket_Dues table must have a corresponding row in the Subscriptions table.

CUser.UserID does not have to be set to "IBOGuest" for an anonymous user. If CUser.UserID is set to "IBOGuest," ConvertGuest changes CUser.ContactID from "IBOGuest" to the new ContactID. This also applies to CStdOrder.BillToID.

CUser.UserID does not log in a user. If CUser.UserID and CUser.Password are set, the user ID and password can be verified. CUser.UserID is only set by iBO when ConvertGuest is called to change "IBOGuest" to the new ContactID.

If ConvertGuest is called on any ContactID other than "IBOGuest," an error message is generated.

If a custom iBO page returns to e-Series checkout without calling the e-Series login page, e-Series requests that the user register and sets the user up as a Web Member. CESeriesIntegration.ConvertGuest must be called, followed by CContact.SubmitChanges, then the e-Series login page. The e-Series login page verifies that the user is valid by using the Name_Security row that was inserted by SubmitChanges. An "IBOGuest" CContact cannot be used for SubmitChanges.

A CContact with an ID of IBOGuest cannot be created. If GetContactByID("IBOGuest") is used, you cannot call SubmitChanges on it. You can perform any other operations, but

you will not be able to change the database. Because it has different initialization values, it may behave slightly differently than a "normal" new CContact.

Two "IBOGuest" instances cannot interact. Multiple "IIBOGuest" instances have the same ContactID, but are different in memory.

ColdFusion sessions

A ColdFusion session is identified by CFID and CFToken. A new ColdFusion session is assigned a CFID and CFToken when the session is established. The CFID and CFToken are valid until the session times out due to user inactivity. iBO uses CFID and CFToken to identify the Basket table rows associated with the CESeriesIntegration instance.

If invalid CFID and CFToken values are passed to iBO, iBO does not know that these values are invalid. iBO uses these values to read the Basket tables and will not find any rows, which implies that no products have been ordered and no payments have been made for subscriptions.

ESeriesIntegration.GetStdOrder gets the CStdOrder associated with the session specified by CFID and CFToken. iBO then creates a new standard order and adds order lines for each row in the Basket_Order table. This behavior does not correspond to CStdOrders.New or GetStdOrder.

A reference to CContact should not be obtained before calling CESeriesIntegration. If a CContact and its subscriptions are obtained, the SaveToESeriesBasket method is not available since a CContact cannot be passed to CESeriesIntegration. Therefore, you cannot set the CSubscription.Amount paid and process it with e-Series checkout. You can modify the subscriptions and then call SubmitChanges to update the Subscriptions table so that e-Series can then process these subscriptions in the same manner it uses to process existing subscriptions for existing members. In this scenario, the ConvertGuest method is not available to convert CContact from an anonymous user to a member.

If you call GetXML, save the contents in a ColdFusion session variable, build an HTML string and return it to CF/IIS, and then exit your ColdFusion/custom iBO page, the HTML string displays in the user's browser. If the user clicks a link in the page, an HTTP Request string is sent to IIS. This string is transferred to ColdFusion because of the page

name extension. ColdFusion parses the HTTP Request string and extracts CFID and CFToken. The CFID and CFToken values are used to restore the ColdFusion environment. If control is passed to a custom iBO page, CFID, CFToken, and XMLstring must be available to the custom iBO page, most likely as session variables.

CESerieBOAdmin.Restore(XMLString, CUser) returns a reference to CESeriesIntegration such that CESeriesIntegration will be set up as it was when GetXML was called. Any changes made to CUser, CContact, and CSubscription, and any products imported via the Basket tables or added via NewStdOrderLine, are present, as if control was passed from the instruction before GetXML to the instruction after Restore with no intervening activity.

To empty the basket tables from iBO, delete all of the CStdOrderLine instances associated with the CStdOrder and then call SaveToESeriesBasket.

If the user's ColdFusion session times out, the ColdFusion session variables are lost, including probably the XMLString. The user cannot continue their session because CFID and CFToken are no longer valid. Everything that the user has done that has not been committed to the database is lost. The next time the user logs in to the site, the basket table entries for the user will be deleted.

Basket tables

iBO assumes that the Basket tables will not be modified between the GetXML and Restore calls. Restore differs from LoadXML in the following ways:

- Restore is called on CESeriesBOAdmin
- Restore modifies the CUser instance, including DBID
- Restore returns a CESeriesIntegration instance

CESeriesBOAdmin.NewESeries uses the CFID and CFToken parameters that Restore obtains from the XML string. The XML string includes CESeriesIntegration data, CUser data, CContact, CAddress, CNote, CExtView, CSubscriptions, CSubscription, CStdOrder, and CStdOrderLine. The XML string does not include the Basket tables.

Viewing the iBO Change Log in Customer Portfolio

To view the iBO change log in Customer Portfolio, you must expand the data grid's row height or highlight the log text to see all of the logged fields created by iBO.

Usage Tips by Module

General Issues

Batch attributes

In iMIS, you can modify only the following batch attributes:

- batchnum
- data
- description
- control count
- control amount
- actual count
- cash table

iBO allows you to modify all batch attributes except for the DateCreated property.

International dates

If you are using international dates with iBO, you must configure the database and Web server to use the appropriate international locale. The locale on both the database and web server must be the same. Date information that is passed from the presentation layer to the iBO API must be in the same international locale format as the database and web-server. The iBO API returns date information to the presentation layer in this same international locale format.

iboCustomerManagement

Checksum for Automatically Assigned IDs

Checksum digits can be added to IDs that are automatically generated by iMIS. IDs generated with this option have a more unique value than IDs that are just sequentially assigned numbers. This only applies to IDs that are automatically generated for Name records; it does not apply to other IDs that are automatically generated.

Note: The checksum is not a random number. The checksum is derived from the ID using a specific set of algorithms.

To add checksums to automatically generated IDs, enable the Use Checksum for IDs option on the Customer Setup - Basic Options window (from Customers, select Set up module> General, and select Basic Options).

Synchronizing Phone Numbers and Email Addresses

iBO provides the same synchronization capabilities for Home Phone, Work Phone, Fax and E-mail as iMIS Customer Management.

The Work Phone, Home Phone, Fax, and E-mail fields (Name table) on the Profile tab on the Manage customers window can be mapped to the Phone, Fax, and E-mail fields (Name_Address table) on any address purpose defined in the Main, 2nd, or 3rd fields on the Customer Setup - Address and Notes window.

By mapping these fields, the data defined in these fields automatically populates the corresponding fields on the Profile tab or the address purpose tab (Name_Address data to Name data and vice versa). Synchronization allows data to match and eliminates the need to enter data twice.

See the Customer Management guide for more information on synchronizing phone numbers and e-mail addresses.

iboEvents

VAT and GST Taxation

iboEvents supports VAT and GST taxation.

- For VAT, if a meeting function is taxable and has a tax code assigned, all members will be charged VAT unless Name_Fin.USE_VAT_TAXATION is True.
- For GST taxation (seen as Canadian taxation in the Desktop view settings), if a tax authority is assigned at the meeting level and the meeting function is PST and/or GST taxable, all members will be charged tax unless Name_Fin.TAX_EXEMPT is not blank.

iboOrders

Registrations use iboOrders, which does not have any license key requirements. Other BOs and the ASI Presentation Layer code cannot call iboStdOrders if the "ORDER" key is not present.

If the ShipToID is changed while working with a CStdOrder, the new Ship-To contact is loaded from the database and verified. The address information for the CStdOrder is also refreshed to match the preferred mail address information of the new Ship-To contact.

Shipping Costs and Shipping Zones

Shipping costs will not be calculated correctly if an order is placed from a country for which shipping rates and zones have not been set up in iMIS.

Shipping zones are defined according to postal code. Depending on your organization's needs, you can define single postal codes as shipping zones or divide groups of postal codes into shipping zones.

Shipping zones use the first three characters of a postal code, and the table format for defining zones is XXX,Z where XXX represents the first three characters of a postal code, and Z represents the zone designation defined by the user. You also can enter a postal code in the format XXX-XXX,Z where XXX represents the first three characters of the beginning postal code, XXX represents the first three characters of the ending postal code, and Z represents the zone designation. These zone designations are used when setting up weight tables on the Set up freight by weight window.

For example, if you define a shipping zone for a single postal code, such as 75208, you would enter 752 followed by a comma. You then would enter either a numeric or alphabetic value for the zone designation, such as a 1. The shipping zone would display as

752,1. A shipping zone defined for a group of postal codes could be entered as 900-999,2.

As long as you follow the correct table format, you can define as many zone codes as necessary. You must define shipping zone tables before defining freight tables. Zone tables are defined on the Set up zones window.

Quantity Shipped

The QtyShipped attribute in the iBO Order object is not set by iBO since nothing has yet shipped. The QtyShipped attribute is set by iMIS Orders when the order is shipped.

Multiple Entities for Products

iBO supports multiple entities at the product level. If multiple entities is enabled, the ORG_CODE is derived from the first non-blank product in the order. If there is no entity associated with the first non-blank product, the default order entity is used. If there is no order entity, the system default entity is used. If multiple entities is not enabled, the system default entity is used.

See the Order Processing guide for more information on multiple entities at the product level.

Code Samples

Sample scenarios and code

These sample code segments are for illustration only; be aware that they omit necessary conventions, such as releasing object instances and declaring and initializing variables.

Code sample: Contacts - Find and update data

The code below demonstrates the following scenario:

Find Contacts with ContactType = 'CM' and County = 'TRAVIS,' display them, and update the one with the ContactYears >= five, changing the Category to 'A'.

```
dim cboContactsAdmin as iboContactManagement.CContactsBOAdmin

dim contsContacts as iboContactManagement.Contacts
```

```
dim usrUser as iboUserSecurity.CUser
dim errErrors as iboErrors.Errors

usrUser.DBID = “ODBC:iMIS_dsn”

Set cboContactsAdmin = new CContacts.CContactsBOAdmin

Set contsContacts = cboContactsAdmin.GetContacts(usrUser)

contsContactsFilter = contsContacts.Filter

contsContactsFilter.Operator = efilAnd
contsContactsFilter.AddFilter(eContactType, "CM", efilEqual)
contsContactsFilter.AddFilter(eCounty, "TRAVIS", efilEqual)

contsContacts.GetContacts()

For x = 1 to contsContacts.Count
contContact = contsContacts.GetContact(x)
   strContactFirstName = contContact.FirstName
   etc.....
   (display Contact data row...)
   If contContact.ContactYears > 5 Then
```

```
      contContact.Category = 'A'
      contContact.Validate( )
      If contContact.ErrorCount > 0
         Set errErrors = contContact.Errors
         strError = errErrors.GetErrorMessage( )
         ' (process or display strError...)
      Else
         contContact.SubmitChanges(errErrors1,1)
      End If
   If contContact.ErrorCount > 0
      Set errErrors = contContact.Errors
      strError = errErrors.GetErrorMessage( )
      ' (process or display strError...)
   End If
 End If
Next x
```

Code sample: Contacts - Delete and insert data

The code below demonstrates the following scenario:

Retrieve Contact 'Scott Smith' who has ContactYears > 3, delete the address with purpose = “Temporary,” add an address with purpose = “VacationHome,” and display the addresses.

Note: For brevity, this code omits checking Errors.

```
contsContacts = cboContactsAdmin. NewContacts(usrUser)
```

```
contsContactsFilter = contsContacts.Filter
contsContactsFilter.Clear()

contsContactsFilter.Operator = efilAnd
contsContactsFilter.AddFilter(eLastName, "Smith", efilEqual)
contsContactsFilter.AddFilter(eFirstName, "Scott", efilEqual)
contsContactsFilter.AddFilter(eContactYears, "3", efilGT)

contsContacts.GetContacts()

If contsContacts.Count > 1 Then
   (whoops, got more than one member; handle it...)
Else
   contContact= CContacts.GetContact(1)
End If

contContact.GetAddresses()

For x = 1 to contContact.AddressCount
objAddress = contContact.GetAddress(x)
If objAddress.Purpose = “Temporary” Then
   objAddress.Delete()
End If
```

```
Next


addrAddress2 = contContact.NewAddress()
addrAddress2.Purpose = “VacationHome”
addrAddress2.Country = “Fiji”
addrAddress2....
CContact.SubmitChanges()
```

Code sample: Contacts - Update user-defined data

The code below demonstrates the following scenario:

Retrieve the user-defined data for a Contact and display the data from one of the user-defined windows, modify a field value, and submit the change.

```
contContact.GetExtViews()


evwExtView = contContact.GetExtView(1)


strViewName = evwExtView.ViewName
(display ViewName...)


evwExtView.ExtGetFields()   /* returns them in order by TabSeq (tab order) */


For x = 1 to evwExtView.FieldsCount
efldField = evwExtView.ExtGetField(x)
strPrompt = efldField.Prompt
intFieldType = efldField.DataType
```

```
Select Case intFieldType
   Case iMISDataTypeChar
      intFieldWidth = efldField.FieldWidth
   Case iMISDataTypeInt
/* (Initialize as needed to prepare to display the field... ) */
   Case iMISDataTypeMoney
      ....
   Case iMISDataTypeCheckBox
      ....
   Case iMISDataTypeDate
      ....
   etc...
End Select
   (/* logic to display field prompt and value... */)
Next

/* (logic to retain/retrieve the field number corresponding to the edited field...) */

efldField = evwExtView.GetField(x)
efldField.Value = /* (user input value) */
contContact.SubmitChanges()

/* process errErrors object... */
```

Code sample: Events - Display and register function data

The code below demonstrates the following scenario (assuming that the customer ID has been retrieved into the variable 'strCustID'):

Display available events with their function definitions, and register the customer's GUI selection of two functions.

```
dim cboEventsAdmin as iboEvents.CEventsBOAdmin

dim evtsEvents as iboEvents.CEvents

dim usrUser as iboUserSecurity.CUser


usrUser.DBID = “ODBC:imisdb”


Set cboEventsAdmin = new iboEvents.CEventsBOAdmin


' (Get events to choose from...)

Set evtsEvents = cboEventsAdmin.NewEvents(usrUser)

evtsEvents.GetEvents(True,True,True,100)

If evtsEvents.ErrorsCount > 0

' (handle errors by retrieving and parsing evtsEvents.Errors...)

End If


For x = 1 to evEvents.Count

   evtEvent = evEvents.GetEvent(x)

   strEventTitle = evtEvent.Title

   ' (display event title...)
```

```
    For y = 1 to evtEvent.FunctionsCount
        evtFunction = evtEvent.GetFunction(y)
        strDescription = evtFunction.Description
        ' etc... (display function information...)
    Next
Next

' (next page after event is chosen, and the EventCode is stored in strEventCode, and the function codes are stored in strFunction1 and strFunction2...)

Set regRegistration = cboEventsAdmin.NewRegistration(usrUser, strEventCode, strRegistrantID,True,True,True,False)

regRegistration.NewLineItem(strFunctionCode1)
regRegistration.NewLineItem(strFunctionCode2)
If regRegistration.ErrorsCount > 0
' (handle errors by retrieving and parsing regRegistration.Errors...)
End If

regBadge = regRegistration.NewBadge()
regBadge.FirstName = "..."
regBadge.Designation = "..."
etc...
If regBadge.ErrorsCount > 0
```

```
    ' (handle errors by retrieving and parsing regBadge.Errors...)
End If

regPaymt = regRegistration.PaymentInfo
regPaymt.PayType = “CC”
regPaymt.CkOrCCNumber = “4111994822221111”
regPaymt.Amount = 495.00
regPaymt.CCExpire = “10/02”
regPaymt.CCType = “MC”
regPaymt.Validate
If regPaymt.ErrorCount > 0
' (handle errors by retrieving and parsing regPaymt.ErrorsObject...)
End If

regRegistration.SubmitChanges()
If regRegistration.ErrorCount > 0
' (handle errors by retrieving and parsing regRegistration.ErrorsObject...)
End If
```

Code sample: Paging

This Visual Basic example will display all people with a last name in a given state, 10 at a time, sorted by last name. The first portion initiates paging and the second portion moves to the next page.

```
Option Explicit
Dim strPage As String
```

```
Dim Total As Integer
Dim curPage As Integer


Private Sub cmdFind_Select()
Dim I As Long
Dim CUser As iboUserSecurity.CUser
Dim cboa As iboContactManagement.CContactsBOAdmin
Dim contacts As iboContactManagement.CContacts
Dim contact As iboContactManagement.CContact


Set CUser = New iboUserSecurity.CUser
CUser.DBID = "ODBC:Student02"
Set cboa = New iboContactManagement.CContactsBOAdmin
Set contacts = cboa.NewContacts(CUser)
contacts.ContactFilter.Operator = efilAnd
contacts.ContactFilter.AddFilter \ ZiboContactManagement_CContact.StateProvince, _ \
   txtState, efilEqual
contacts.ContactFilter.AddFilter ZiboContactManagement_CContact.LastName, _ \
   "", efilNotEqual
'NOTE THE NEW WAY OF SORTING - WORKS WITH PAGING - 'START WITH zibo
'USED IN FILTER TO SORT ON
'THEN ADD EITHER edrqAscending OR edrqDescending
'SO ODD NUMBER PARAMETERS ARE zibo, EVEN NUMBER 'PARAMETERS edrqAs-
cending OR edrqDescending
'YOU CAN HAVE AS MANY PAIRS AS YOU WANT, BUT MUST BE 'PAIRS
Call contacts.ContactFilter.SetOrderList(ZiboContactManagement_CContact.LastName,
edrqAscending)
If contacts.ErrorsCount Then
   MsgBox contacts.Errors.ErrorsToString
End If
'NOTE - YOU MUST PERFORM A GET CONTACTS IN ORDER TO GET HOW MANY
```

```
'PAGES ARE REQUIRED
'A PRODUCT ENHANCEMENT HAS BEEN MADE FOR THIS
Call contacts.GetContacts(True, 0)
Total = contacts.Count / 10
curPage = 1
strPage = contacts.GetContactsPaged("", 10, 1)
For I = 1 To contacts.Count
   Set contact = contacts.GetContact(I)
   List1.AddItem (contact.ContactID & " " & \
     contact.MainAddress.StateProvince _ \
     & " " & contact.LastName)
Next


End Sub


Private Sub cmdPage_Select()
   Dim CUser As iboUserSecurity.CUser
   Dim cboa As iboContactManagement.CContactsBOAdmin
   Dim contacts As iboContactManagement.CContacts
   Dim contact As iboContactManagement.CContact

   Set CUser = New iboUserSecurity.CUser
   CUser.DBID = "ODBC:Student02"
   Set cboa = New iboContactManagement.CContactsBOAdmin
   Set contacts = cboa.NewContacts(CUser)
   'YES - YOU MUST REDO THE FILTER EACH TIME YOU GET SUBSEQUENT
   'PAGES.  AFTER DISCUSSIONS WITH
   'DEVELOPERS, THEY COULDN'T CODE IT EASILY TO STORE THE FILTER,
   'SO YOU HAVE TO SPECIFY IT FOR
   'EACH SUBSEQUENT PAGE.  THIS MAY BE RESOLVED IN THE FUTURE.
   'THEY KNOW ABOUT THIS ISSUE.
```

```
  contacts.ContactFilter.Operator = efilAnd
  contacts.ContactFilter.AddFilter \
    ZiboContactManagement_CContact.StateProvince, _ \
    txtState, efilEqual
  contacts.ContactFilter.AddFilter \
    ZiboContactManagement_CContact.LastName, _ \
    "", efilNotEqual
  Call \
    contacts.ContactFilter.SetOrderList(ZiboContactManagement_\
    CContact.LastName, edrqAscending)

  If curPage < Total Then
     curPage = curPage + 1
  Else
     curPage = 1
     List1.Clear 'only clearing list when going back to 1st
     'page, so you can see it working
  End If
  strPage = contacts.GetContactsPaged(strPage, 10, curPage)
  Dim I As Integer
  For I = 1 To contacts.Count
     Set contact = contacts.GetContact(I)
     List1.AddItem (contact.ContactID & " " & \
       contact.MainAddress.StateProvince _ \
       & " " & contact.LastName)
  Next
End Sub
```

Sample application

The following Active Server Pages implementation (using Javascript) demonstrates how you could use the iBO interface to design a custom registration web application.

Note: To be implemented, this code requires some minor changes to the unencrypted e-Series source code. Contact ASI Consulting if you are interested in attempting a similar ASP implementation.

Code sample: index.asp

```
<HTML>

<HEAD>

<TITLE></TITLE>

<link rel='stylesheet' href='http://eseriesdev/eseriesIBO/scriptcontent/stylesheet.css' type='text/css'>

</HEAD>

<BODY>


<%

var strActivetab;


   /* Read in the querystring values... */

strActivetab = Request.QueryString("activetab");

strDSN = Request.QueryString("DSN");

strContactID = Request("ContactID");

strIP = Request("IP");

strEventCode = Request.QueryString("Event") ;

strFind = Request("Find");

strFilter = Request("Filter");
```

```
var strFilterTest = new String(Request("Filter"));


if (strFilterTest=="undefined"){

strFilter = 5;

}

%>


<table border="0" cellpadding="0" cellspacing="0" width="95%"><tr><td align="left" style-
e="padding: 0 0 0 0">


<!---tab table--->

<table border="0" cellpadding="3" cellspacing="0" class="tab-table">

   <tr>

<td align="middle" class=<% if (Request.QueryString("activetab")=="1"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><a href-
="i-
ndex.as-
p?DSN-
N=<%=strDSN%>&IP=<%=strIP%>&ShowEvents=TRUE&ContactID=<%=Request
("ContactID")%>&activetab=1">Select Event</a></td>

<td align="middle" class=<% if (Request.QueryString("activetab")=="2"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><% if
(Request.QueryString("activetab")=="2" || Request.QueryString("activetab")=="3")
{Response.Write("<a href=index.asp?DSN="+strDSN+"&ShowFunctions=TRUE&IP=" +
strIP + "&ContactID="+Request("ContactID")+"&act-
```

ivetab=2&Event="+strEventCode+">Event");} else {Response.Write("<span class-
s=EN10>Event");}%></td>

<td align="middle" class=<% if (Request.QueryString("activetab")=="3"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><span class-
s="EN10">Event Detail</SPAN></td>

<td align="middle" class=<% if (Request.QueryString("activetab")=="4"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><span class-
s="EN10">Event Review</SPAN></td>

</tr></table>

<!---/tab table--->

</td></tr>

<tr><td align="left" style="padding: 0 0 0 0">

<!---tab body table--->

<table border="0" cellpadding="3" cellspacing="0" class="tab-table" width="100%">

<form action-
n="index.asp?DSN=<%=strDSN%>&ShowEvents=TRUE&ContactID=<%=Request
("ContactID")%>&activetab=1" method=post>

<tr class="tab-button"><td colspan="4" align="right"><a href=http://srobinson-w2k/eser-
iesIBO>Back to Main Site | Find events that <select
name="Filter"><option value=5>Contain</option><option value=6>Begins With</-
option></select> <input type="text" name="find" size="10" value="<%=(strFind)%>">
<input type="submit" value="go"></td></tr>

</form>

<tr bgcolor="black" height="1"><td colspan="4"></td></tr>

```
   <tr><td colspan="4">
   <!------>


<TABLE cellSpacing=0 cellPadding=3 border=0 width=95% align="center">
 <TR>
<%
      var EvtAdminObject ;
      var EvtsObject ;
      var EvtObject ;
      var UserObject ;
      var lngCount ;
      var errObject ;
      var strLink1 ;
      var strLink ;

/* The following will be enumerated constants in the future... */
      var lngEvtPropMeeting = 2001001 ;
      var lngEvtPropTitle = 2001004 ;

      var intfilEqual = 1 ;
      var intfilNotEqual = 2 ;
      var intfilGT = 3 ;
      var intfilLT = 4 ;
```

```
    var intfilContains = 5 ;
    var intfilBeginsWith = 6 ;

/* Set up a User and Events admin object to instantiate IBO Events. */
    UserObject = Server.CreateObject("iboUserSecurity.CUser") ;
    UserObject.DBID = "ODBC:" + Request.QueryString("DSN") ;
EvtAdminObject = Server.CreateObject("iboEvents.CEventsBOAdmin") ;
    EvtsObject = EvtAdminObject.NewEvents(UserObject) ;

if(Request.QueryString("ShowEvents")=="TRUE")
/* Displaying the events list... */
    {
/* Filter, retrieve, and display events based on the supplied filter... */
Response.Write("<TR><TD COLSPAN=2><span class=EB10>Select an event to begin registration</span></td></tr>") ;

strLink1 = "<a href=http://srobinson-w2k/eseriesIBO/ibo_demo/index.asp?activetab=2&DSN=" + strDSN + "&IP=" + strIP + "&ContactID=" + strContactID + "&ShowFunctions=TRUE&Event=" ;

EvtsObject.EventFilter.AddFilter(eEvtTitle, strFind, strFilter)  ;
/* params: true - clear collection first, false - don't retrieve function data, false - don't retrieve function fee data, 100 maximum records */
    EvtsObject.GetEvents(true,false,false,100) ;
```

```
        lngCount = 1 ;
Response.Write("<tr class=ETH><td></td><td colspan=2 height=1></td></tr>") ;
        while(lngCount <= EvtsObject.Count)
   /* The events are displayed such that they will link to the ShowFunctions page (below) with the eventcode in the QueryString. */
EvtObject = EvtsObject.GetEvent(lngCount) ;
strLink = "<tr><td align=right valign=middle class=ETD width=150>" + strLink1 + EvtObject.EventCode + ">" + EvtObject.Title + "</a></td><td align=left valign=middle class=ETDALT width=425><span class=EN10>" + EvtObject.Description + "</span></td></tr>"
Response.Write(strLink) ;
Response.Write("<tr class=ETH><td></td><td colspan=2 height=1></td></tr>") ;
           lngCount += 1 ;
        }

Response.Write("") ;
}

if(Request.QueryString("ShowFunctions") == "TRUE")
/* Displaying the functions for a selected event... */
{

var strChkBox ;
```

```
var strDSN ;

var strEventCode ;


strEventCode = Request.QueryString("Event") ;


strLink1 = "   <a href=http://srobinson-w2k/eseriesIBO/ibo_demo/in-
dex.asp?DSN=" + strDSN + "&IP=" + strIP + "&Event=" + strEventCode + "&ContactID="
+ strContactID + "&FunctionDetail=TRUE&activetab=3&Function=" ;


EvtObject = EvtsObject.GetEventByCode(strEventCode) ;


/* Now display the functions on a submit form, each with a checkbox... */

Response.Write("<FORM ACTION=http://srobinson-w2k/eseriesIBO/ibo_demo/Re-
gistrationReview.asp?activetab=4&Event=" + strEventCode + "&ContactID = " +
strContactID + " METHOD=POST/>") ;


Response.Write("<TD>") ;

Response.Write("<span class=EB10>Event: " + EvtObject.Title + "</SPAN><BR>") ;

Response.Write("<span class=EN8>Select register select one or more func-
tions</SPAN>") ;

Response.Write("</TD></TR>") ;


    lngCount = 1 ;
```

```
Response.Write("<INPUT TYPE=HIDDEN NAME=Event VALUE=" + strEventCode +
">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=ContactID VALUE=" + strContactID +
">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=DSN VALUE=" + strDSN + ">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=ACTIVETAB VALUE=4>") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=IP VALUE=" + strIP + ">") ;

while(lngCount <= EvtObject.FunctionsCount)

   /* Each function will be displayed with the event and function code in the querystring,
linking to the Function Detail page (below)... */

        Response.Write("<TR><TD>") ;

        FunctionObject = EvtObject.GetFunction(lngCount) ;

strLink = strLink1 + FunctionObject.FunctionCode + ">" + FunctionObject.FunctionTitle +
"</a>"

strChkBox = " <INPUT TYPE=CHECKBOX VALUE=ON NAME=" + Func-
tionObject.FunctionCode + " style=border-width=0;>"

Response.Write(strChkBox + strLink) ;


        lngCount += 1 ;

        Response.Write("</TD></TR>") ;

}


      Response.Write("<TR><TD>") ;
```

```
Response.Write("<SPAN CLASS=EN10>Enter Registrant Class Code: <INPUT TYPE-
E=TEXT NAME=RegClass SIZE=8></SPAN> ") ;
      Response.Write(" <INPUT TYPE=SUBMIT VALUE=Review> ") ;


      Response.Write("</TD>") ;
      }

if(Request.QueryString("FunctionDetail") == "TRUE")
/* Displaying the detail for a selected function... */
   {
      var EvtAdminObject ;
      var EvtsObject ;
      var EvtObject ;
      var UserObject ;
      var FunctionObject ;
      var errObject ;
      var strFunctionCode ;
      var strAutoEnroll ;

strEventCode = Request.QueryString("Event") ;
strFunctionCode = Request.QueryString("Function") ;

UserObject = Server.CreateObject("iboUserSecurity.CUser") ;
```

```
UserObject.DBID = "ODBC:" + Request.QueryString("DSN") ;
EvtAdminObject = Server.CreateObject("iboEvents.CEventsBOAdmin") ;
EvtsObject = EvtAdminObject.GetEventsObj(UserObject) ;

EvtObject = EvtsObject.GetEventByCode(strEventCode) ;
FunctionObject = EvtObject.GetFunctionByCode(strFunctionCode) ;

if(FunctionObject.AutoEnroll)
        strAutoEnroll = "YES" ;
    else
        strAutoEnroll = "NO" ;

    Response.Write("<TD>") ;
Response.Write("<span class=EB11>Event: " + EvtObject.Title + "</SPAN><BR>") ;
Response.Write("<span class=EB11>Function: " + FunctionObject.FunctionTitle +
"</SPAN>") ;
Response.Write("<br><P align=center><span class=EN10><U>Function
Detail:</U></SPAN><br><BR>") ;
    strPct = "%"
Response.Write("<TABLE align=center width=100"+strPct+">") ;

/* Function Detail : */
strHeaderBegin = "<TD align=right><span class=EB10>" ;
strHeaderEnd = ": </SPAN></TD>"
```

```
strValueBegin = "<TD align=left><span class=EN10>"
strValueEnd = "</SPAN></TD>"

Response.Write("<TR>") ;
Response.Write(strHeaderBegin + "Function Code" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.FunctionCode + strValueEnd) ;
Response.Write(strHeaderBegin + "Title" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.FunctionTitle + strValueEnd) ;
Response.Write("</TR>") ;
Response.Write("<TR>") ;
Response.Write(strHeaderBegin + "Begin Date" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.BeginDate + strValueEnd) ;
Response.Write(strHeaderBegin + "End Date" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.EndDate + strValueEnd) ;
Response.Write("</TR>") ;
Response.Write("<TR>") ;
Response.Write(strHeaderBegin + "Maximum Attendence" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.MaxAttendees + strValueEnd) ;
Response.Write(strHeaderBegin + "Auto-Enroll?" + strHeaderEnd) ;
Response.Write(strValueBegin + strAutoEnroll + strValueEnd) ;
Response.Write("</TR>") ;
    Response.Write("<TR>") ;
Response.Write(strHeaderBegin + "Status" + strHeaderEnd) ;
```

```
Response.Write(strValueBegin + FunctionObject.Status + strValueEnd) ;
Response.Write(strHeaderBegin + "Total Registered" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.RegistrantsCount + strValueEnd) ;
Response.Write("</TR>") ;
Response.Write("<TR>") ;
Response.Write(strHeaderBegin + "Type" + strHeaderEnd) ;
Response.Write(strValueBegin + FunctionObject.FunctionType + strValueEnd) ;
Response.Write("</TR>") ;

    Response.Write("</TABLE>") ;

Response.Write("<br><SPAN CLASS=EN10><U>Registrant Fees for this func-
tion:</U></SPAN><br><br>") ;

Response.Write("<TABLE cellpadding=3 cellspacing=0 align=center width-
h=100"+strPct+">") ;

    lngCount = 1 ;

Response.Write("<TR><TD CLASS=ERSHeader align=center valign=middle>Registrant
Class</TD>") ;
Response.Write("<TD CLASS=ERSHeader align=center valign=middle>Code</TD>") ;
Response.Write("<TD CLASS=ERSHeader align=center valign-
n=middle>Complementary?</TD>") ;
```

```
Response.Write("<TD CLASS=ERSHeader align=center valign=middle>Early
Fee</TD>") ;

Response.Write("<TD CLASS=ERSHeader align=center valign=middle>Regular
Fee</TD>") ;

Response.Write("<TD CLASS=ERSHeader align=center valign=middle>Late
Fee</TD></TR>") ;

while(lngCount <= FunctionObject.FunctionFeesCount)

   /* Function fee detail for each fee definition... */

ffeeFunctionFee = FunctionObject.GetFunctionFee(lngCount) ;

      strRegClass = ffeeFunctionFee.RegClassDescription ;

      strRegClassCode = ffeeFunctionFee.RegClass ;

      strFee1 = "$" + ffeeFunctionFee.EarlyFee ;

      strFee2 = "$" + ffeeFunctionFee.RegularFee ;

      strFee3 = "$" + ffeeFunctionFee.LateFee ;

      strIncomeAcct = ffeeFunctionFee.IncomeAccount ;

      if (ffeeFunctionFee.Complementary == true)

          strComplementary = "YES" ;

        else

          strComplementary = "NO" ;


Response.Write("<TR><TD><I><span class=EN10>" + strRegClass +
"</I></span></TD>") ;

Response.Write("<TD><span class=EN10>" + strRegClassCode + "</span></TD>") ;
```

```
Response.Write("<TD align=center valign=middle><span class=EN10>" + strCom-
plementary + "</span></TD>") ;
Response.Write("<TD><span class=EN10>" + strFee1 + "</span></TD>") ;
Response.Write("<TD><span class=EN10>" + strFee2 + "</span></TD>") ;
Response.Write("<TD><span class=EN10>" + strFee3 + "</span></TD></TR>") ;

        lngCount += 1 ;
      }

Response.Write("</TABLE>") ;
}
%>
</TR></TABLE>
<!------>

</td></tr></table>
<!---/tab body table--->

</td></tr></table>

<img scr="../images/1x1.gif" width="1" height="10"><br>
<table border="0" cellpadding="3" cellspacing="0" class="tab-table" width="95%">
<tr bgcolor="black" height="1"><td colspan="3"></td></tr>
```

```
<tr class="tab-button"><td colspan="3" align="right">webmaster</td></tr>

<tr><td colspan="3"> </td></tr></table>


</HTML>
```

Code sample: RegistrationReview.asp

```
<HTML>

<HEAD>

<META NAME="GENERATOR" Content="Microsoft Visual Studio 6.0">

<TITLE></TITLE>

<link rel='stylesheet' href='http://eseriesdev/eseriesIBO/scriptcontent/stylesheet.css'
type='text/css'>

</HEAD>

<BODY>


<%

var strActivetab;

strActivetab = Request.QueryString("activetab");

strDSN = Request.QueryString("DSN");

strContactID = Request("ContactID");

strEventCode = Request.QueryString("Event") ;

strIP = Request("IP") ;


%>
```

```
<table border="0" cellpadding="0" cellspacing="0" width="95%"><tr><td align="left" style-
e="padding: 0 0 0 0">


<!---tab table--->

<table border="0" cellpadding="3" cellspacing="0" class="tab-table">

   <tr>

<td align="middle" class=<% if (Request.QueryString("activetab")=="1"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><a href-
="i-
ndex.as-
p?DSN-
N=<%=strDSN%>&ShowEvents=TRUE&IP=<%=strIP%>&ContactID=<%=Request
("ContactID")%>&activetab=1">Select Event</a></td>

<td align="middle" class=<% if (Request.QueryString("activetab")=="2"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><% if
(Request.QueryString("activetab")=="2" || Request.QueryString("activetab")=="3" ||
Request.QueryString("activetab")=="4"){Response.Write("<a href-
f=index.asp?DSN="+strDSN+"&ShowFunctions=TRUE&IP=" + strIP + "&ContactID-
D="+Request("ContactID")+"&activetab=2&Event="+strEventCode+">Event</a>");} else
{Response.Write("<span class=EN10>Event</span>");}%></td>

<td align="middle" class=<% if (Request.QueryString("activetab")=="3"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><span class-
s="EN10">Event Detail</SPAN></td>

<td align="middle" class=<% if (Request.QueryString("activetab")=="4"){
Response.Write("tab-active") }else{ Response.Write("tab-button")}%>><span class-
s="EN10">Event Review</SPAN></td>

   </tr></table>

<!---/tab table--->
```

```
</td></tr>

<tr><td align="left" style="padding: 0 0 0 0">


<!---tab body table--->

<table border="0" cellpadding="3" cellspacing="0" class="tab-table" width="100%">

<form

action="index.asp?DSN=<%=strDSN%>&ShowEvents=TRUE&ContactID=<%=Request
("ContactID")%>&activetab=1" method=post id=form1 name=form1>

<tr class="tab-button"><td colspan="4" align="right"><a href=http://srobinson-w2k/eser-
iesIBO>Back to Main Site</a> | <span class=EN10>Find events that</span> <select
name="Filter"><option value=5>Contain</option><option value=6>Begins With</-
option></select> <input type="text" name="find" size="10"> <input type="submit" value-
e="go" id=submit1 name=submit1></td></tr>

   <tr bgcolor="black" height="1"><td colspan="4"></td></tr>

   </form>

   <tr><td colspan="4" style="padding: 0 0 0 20">


 <TABLE cellSpacing=0 cellPadding=3 border=0 width="45%">

    <TR>


      <!-- Body: -->

      <%


      var EvtAdminObject ;
```

```
var EvtsObject ;
var EvtObject ;
var UserObject ;
var lngCount ;
var blnError ;
var strLink1 ;
var strLink ;
var strChkBox ;
var strDSN ;
var strEventCode ;
var strFunctionCode ;
var strRegClass ;
var funcFee ;
var Registration ;
var strContactID ;
var blnInit ;
var strConfirmed ;
var lngItems ;
```

/* This page is either being posted to from the Functions selection form, or it is being posted to from itself, after the user has reviewed the registration and decides to submit it. First, it sets up a registration object and populates it according to whatever was selected on the Functions selection form (calling Registration.NewLineItem() for each function). Then it either submits the registration if this page was posted to after review, or it displays

```
the registration information for review (the form displays and the submit button posts back
to this page). */

    blnError = false ;

  UserObject = Server.CreateObject("iboUserSecurity.CUser") ;
    UserObject.DBID = "ODBC:" + Request("DSN") ;
EvtAdminObject = Server.CreateObject("iboEvents.CEventsBOAdmin") ;
  EvtsObject = EvtAdminObject.NewEvents(UserObject) ;
    strPct = "%"
Response.Write("<FORM ACTION=http://srobinson-w2k/eseriesIBO/ibo_demo/Re-
gistrationReview.asp? METHOD=POST id=form1 name=form1>") ;
  Response.Write("<TD" + ">") ;

  strEventCode = Request("Event") ;
  strRegClass = Request("RegClass") ;
  strContactID = Request("ContactID") ;
  strConfirmed = Request("Confirmed") ;

  EvtObject = EvtsObject.GetEventByCode(strEventCode) ;
Response.Write("<img scr=../images/1x1.gif width=1 height=3><br>");

Response.Write("<span class=EB10>Event: " + EvtObject.Title + "</span>") ;
```

```
Response.Write("<INPUT TYPE=HIDDEN NAME=Event VALUE=" + strEventCode +
">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=ContactID VALUE=" + strContactID +
">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=Confirmed VALUE=TRUE>") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=DSN VALUE=" + strDSN + ">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=RegClass VALUE=" + strRegClass +
">") ;

Response.Write("<INPUT TYPE=HIDDEN NAME=IP VALUE=" + strIP + ">") ;

   lngCount = 1 ;

      lngItems = 0 ;

while(lngCount <= EvtObject.FunctionsCount && blnError == false)

      {

         FunctionObject = EvtObject.GetFunction(lngCount) ;


         blnInit = false ;

         strFunctionCode = FunctionObject.FunctionCode ;


         if (Request(strFunctionCode) == "ON")

         {

            if(lngItems == 0)

            {

/* Parameters for the following: UserObject contains database context, EventCode and
ContactID for the registration, false - don't auto-enroll any automatic functions, false -
```

```
don't attempt to auto-enroll any linked functions, true - initialize the registration with
default pricing, etc. and true - this is an e-Series basket item. */
Registration = EvtAdminObject.NewRegistration(User-
Object,strEventCode,strContactID,false,false,true,true) ;
   if(EvtAdminObject.ErrorsCount > 0)
Response.Write("<br><br><span class=EB10>ERROR: " + EvtAd-
minObject.Errors.GetErrorMessage() + "</span>") ;
                blnError = true ;
              }
              else
                Registration.RegClass = strRegClass ;

            }
            if(blnError==false)
            {   lngItems += 1 ;
Registration.NewLineItem(strFunctionCode,false) ;
/* false param: don't add linked functions */
Response.Write("<INPUT TYPE=HIDDEN NAME=" + strFunctionCode + " VALUE-
E=ON>") ;
            }
          }

          lngCount += 1 ;
       }
```

```
   if(strConfirmed == "TRUE" && blnError==false)
      {
         Registration.BatchNum = "93" ;
         Registration.IPAddress = strIP ;
         Registration.SubmitChanges() ;
         if(Registration.ErrorsCount==0)
         {
Response.Write("<P align=center>Registration was successfully submitted.</p>") ;
Response.Write("<P align=center><a href-
f=http://eseriesdev/eseriesibo/source/Meetings/cBasketCheckOut.cfm>Proceed to Bas-
ket</a></p>")
         }
         else
Response.Write(Registration.Errors.GetErrorMessage()) ;
      }
      else if(blnError==false)
      {
Response.Write("<br><span class=EN8>Please Review Your Registration</span>") ;
Response.Write("<br><img scr=../images/1x1.gif width=1 height=10 border=0><br>");
if(lngItems > 0)
{
Response.Write("<TABLE align=center cellpadding=3 cellspacing=0 border=0 width-
h=95"+strPct+">") ;
```

```
Response.Write("<TR><TD class=ERSHeader align=center valign-
n=middle>Function</TD>") ;

Response.Write("<TD class=ERSHeader align=center valign-
n=middle>Price</TD></TR>") ;


        lngCount = 1 ;

    while(lngCount <= Registration.LineItemsCount)

        {

Response.Write("<TR><TD><span class=EN9>" + Registration.GetLineItem(lngCoun-
t).FunctionTitle + "</span></TD>") ;

Response.Write("<TD><span class=EN9>$" + Registration.GetLineItem(lngCoun-
t).ExtendedAmount + "</span></TD></TR>") ;

Response.Write("<TR><TD COLSPAN=2 HEIGHT=1 BGCOLOR-
R=BLACK></TD></TR>");

        lngCount += 1 ;

        }

Response.Write("<TR><TD align=right><span class-
s=EN9>Total:</span></TD><TD><span class=EN9>$" + Registration.TotalCharges +
"</span></TD></TR>") ;

Response.Write("</TABLE><TABLE align=center><TR><TD><INPUT TYPE=SUBMIT
VALUE=SAVE></TD></TR></TABLE>") ;

        }

        else

    Response.Write("<P align=center>(No Functions Selected)") ;

    }
```

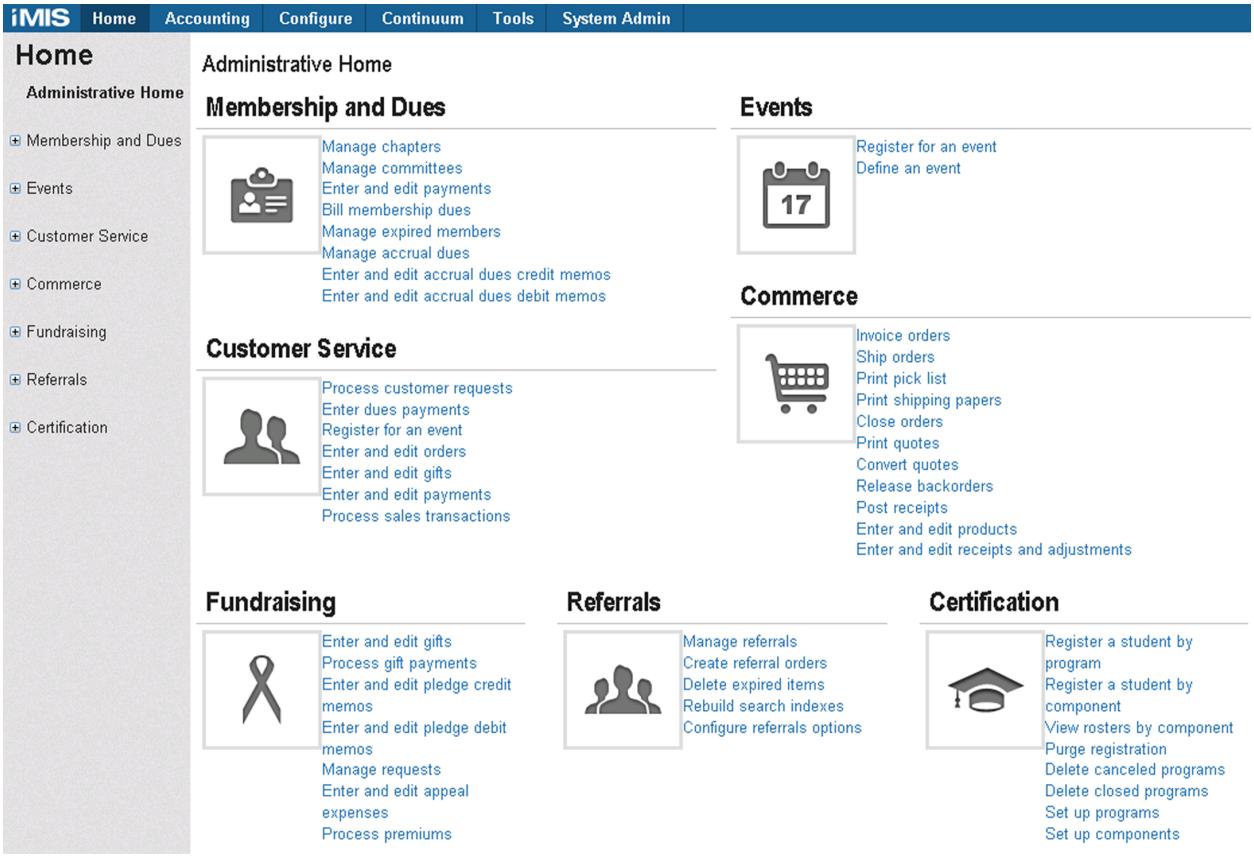
```
   Response.Write("</TD>") ;

   %>

   </TR>
</TABLE>
<img scr=../images/1x1.gif width=1 height=3><br>

</td></tr></table>
<!---/tab body table--->

</td></tr></table>
<table border="0" cellpadding="3" cellspacing="0" class="tab-table" width="95%">
<tr bgcolor="black" height="1"><td colspan="3"></td></tr>
<tr class="tab-button"><td colspan="3" align="right">webmaster</td></tr>
<tr><td colspan="3"> </td></tr></table>

</BODY>
</HTML>
```

iMIS Administrative Console

Administrative Console is a streamlined, easy-to-use interface alternative for customer service and other staff functions. Administrative Console allows an administrator to define and setup iMIS. Also, as iMIS functionality is accessible from the web, many setup options can also be administered from the web.

For iMIS users upgrading from 15.2, Administrative Console includes numerous areas through which you can set up and administer your iMIS system – but you might need to continue using iMIS Desktop to access certain features.

Note: To switch from Desktop back to Administrative Console, change the URL specified in Logon > Set Host Location so that it ends with /CS2 rather than /CS.



iMIS Desktop

iMIS Desktop includes extensive configuration for numerous features: contact management, accounting, billing events, fundraising, and orders.

An alternative to the iMIS Desktop is the iMIS Administrative Console, which is a streamlined, easy-to-use interface. iMIS Desktop continues to allow an administrator to define and setup iMIS. However, as iMIS functionality is accessible from the web, many setup options can be administered from the web.

For iMIS users upgrading from 15.2, Administrative Console includes numerous areas through which you can set up and administer your iMIS system – but you might need to continue using iMIS Desktop to access certain features.

Note: To switch from Administrative Console back to Desktop, change the URL specified in Logon > Set Host Location so that it ends with /CS rather than /CS2.

Site Designer

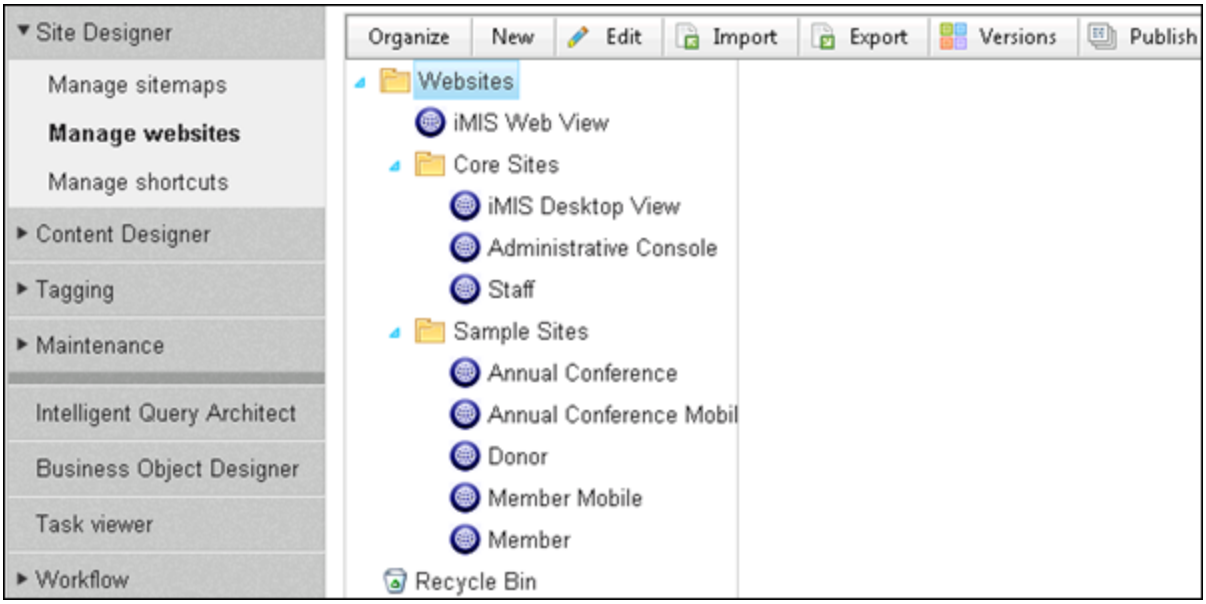
Site Designer allows you to manage sitemap navigation, websites, and URL shortcuts.

The sitemaps for Core Content and Sample Sites are managed by ASI and should not be modified on your system. These sitemaps currently permit editing but any changes will be overwritten by future upgrades.

The Manage websites utility organizes websites into folders that make clear their usage:

- Core Sites holds essential iMIS applications (such as Staff). Be prepared to recreate any customizations you introduce there.
- Sample Sites holds the growing set of sample websites (for example, Member, Member Mobile). Refer to Sample Sites for comparison, but make no changes.

You can copy a sample website|topic=Creating a site and manage your organization's sites outside of these folders so that you can change, copy, and implement customizations, safe from overwriting by upgrades.



Tip: The Access Settings security options are the same throughout iMIS (see Using Access Settings). For best performance, use Preconfigured security sets.

Defining sitemaps (navigation items)

Every iMIS content management website has a corresponding sitemap, in which you define a hierarchy of navigation items. Each navigation item defines the behavior of a single link to a web page of some sort, which can be:

The website's sitemap is automatically created when you define a new iMIS content management website, and is given the same name as the website. Currently, iMIS content management supports one sitemap per website. You cannot delete or change the name of a sitemap. Instead, you define sitemaps by adding and removing navigation items, rearranging navigation items in the sitemap hierarchy, and changing the definition of individual navigation items.

To define sitemaps

Go to RiSE > Site Designer > Manage sitemaps:

1. Select a sitemap you want to define in the drop-down list.
2. In the sitemap tree, select the navigation item beneath which you want to create the new navigation item.
3. Do one of the following:

- Click New > Website Navigation Item to create a new navigation item.
- Click Edit to modify an existing navigation item.
- Click Organize > Delete to delete a navigation item.

4. Define the navigation item’s Properties, Workflow Management, Options, and Access Settings.

To publish sitemaps

Do the following to publish this version of the navigation item and make it visible on its sitemap's associated iMIS content management website.

Go to RiSE > Site Designer > Manage sitemaps:

1. Select a navigation item.
2. Click Publish.

   When you first create a navigation item, or when you make changes to an existing Published navigation item, the navigation item has a status of Working and that particular version of the navigation item is not yet visible on the associated iMIS content management website.

   You reorganize the sitemap hierarchy by dragging and dropping navigation items into new positions. Do the following to reorganize navigation items within the sitemap hierarchy:

- Drop navigation item A onto navigation item B to make A subordinate to B (A becomes a child of B, and B is the parent of A).
- Drop navigation item A into the space below navigation item B (a dotted line appears below B) to make A follow B at the same level of the hierarchy (A becomes a sibling of B).

  Troubleshooting

- You must have one or both of the following content authority group (CAG) permissions in at least one content authority group to which you belong:
- To create new navigation items, you must have Navigation Creator content authority group permissions.
- To modify the properties of a navigation item, you must have Navigation Editor content authority group permissions.
- To edit existing navigation items, you must have both Read and Edit Document System permissions on each navigation item. To delete existing navigation items, you must have Delete Document System permissions on each navigation item. The Document System permissions from the parent navigation item are copied into each newly created navigation item, but can later be changed.
- If you click the rendered link from a navigation item in an iMIS content management website and you receive the following message:

The requested content could not be loaded

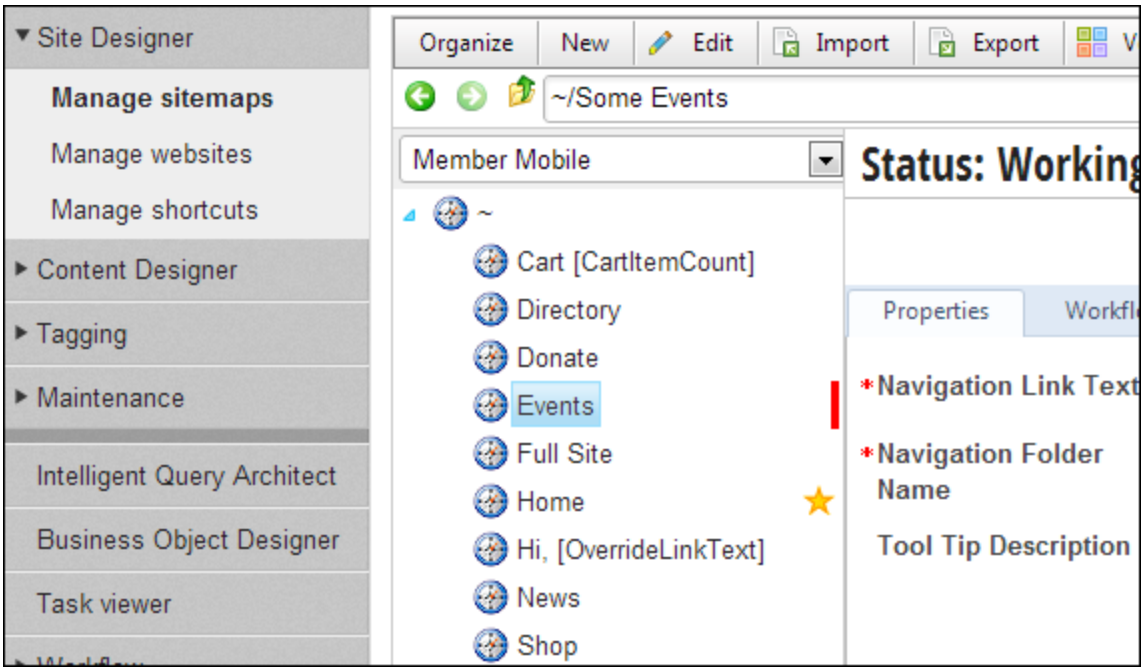
This means that the navigation item's target content record has been deleted. To fix the navigation item, you must do one of the following:

- Point the navigation item at a different content record.
- Remove the navigation item from the sitemap.

Caution! The sitemaps for Core Sites and Sample Sites are protected for use by iMIS. The default Document System permissions for these sitemaps permit editing by SysAdmins only.

Modifying menus and task list items

Site Designer lets you quickly add, move, edit, and delete the items in your menus and task lists from your websites, without ever touching HTML or configuration files.



Site Designer manages the menus and task links for all of your websites

The structure of each website is a sitemap which you manage as a simple hierarchy of navigation items. Users see these as menus (tabs) and groups of task list items.

Editing task list items

As with most work you do in RiSE, your sitemap changes are versioned so that you can revert to a previous iteration, and you can export and import sitemaps between systems.

Go to RiSE > Site Designer > Manage sitemaps:

1. Select a site you want to reorganize in the drop-down list.
2. Drag and drop to change the order of menus and task items.

   Tip: Dropping an item on top of another item places the first item as a subordinate of the second item. To move an item up or down in a list, drop the item onto the dotted line that is temporarily displayed between items during the move.
3. At the bottom right, select Save. The Status section header reports Working.
4. Click Preview on the toolbar to check your changes. You can correct any issues before publishing.
5. Click Publish on the toolbar.
6. Click OK. A window is displayed that reports the publishing success.
7. Click Close.

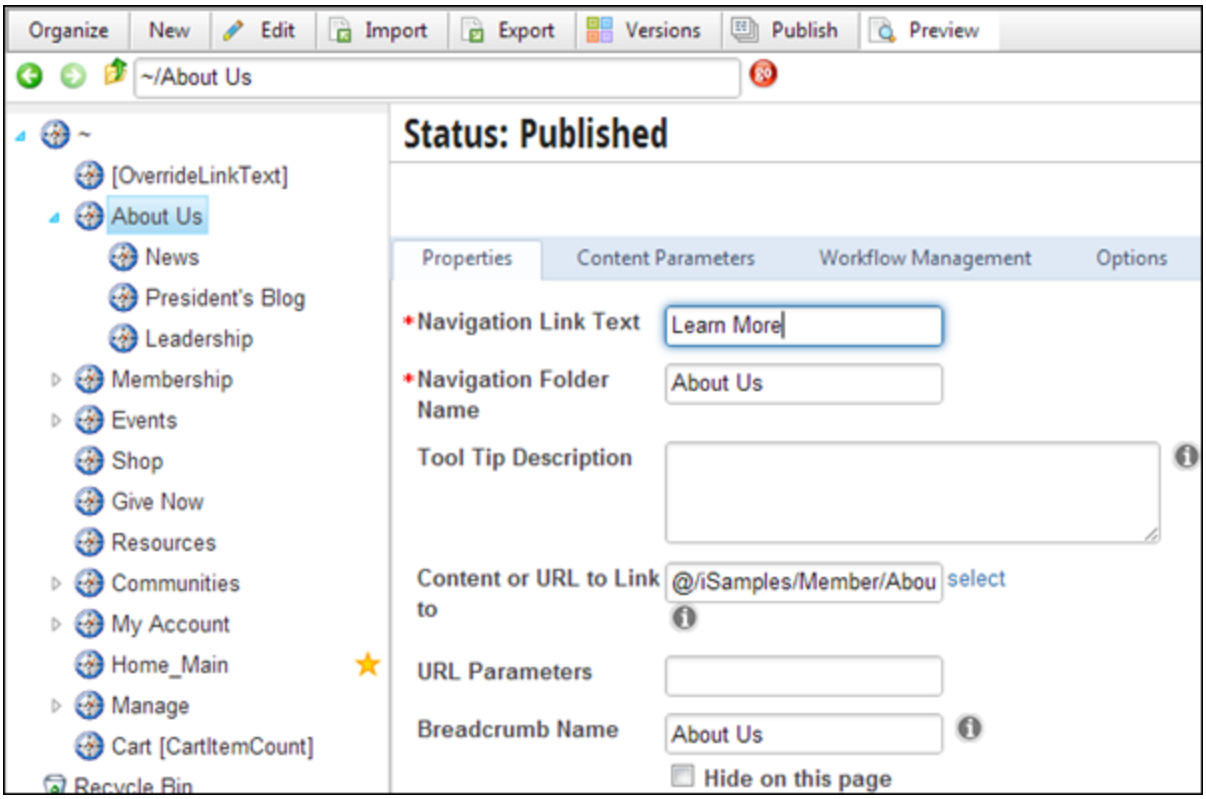
Changing menus and task list items

Do the following to change menus and task list items.

Go to RiSE > Site Designer > Manage sitemaps:

1. Select a site you want to modify in the drop-down list.
2. Select the navigation item you want to change.
3. In the editing window that is displayed, you can edit the navigation item and edit the Properties, Options, and Access Settings.

   For example, to rename About Us to Learn More on your site, select About Us and edit the Navigation Link Text property:



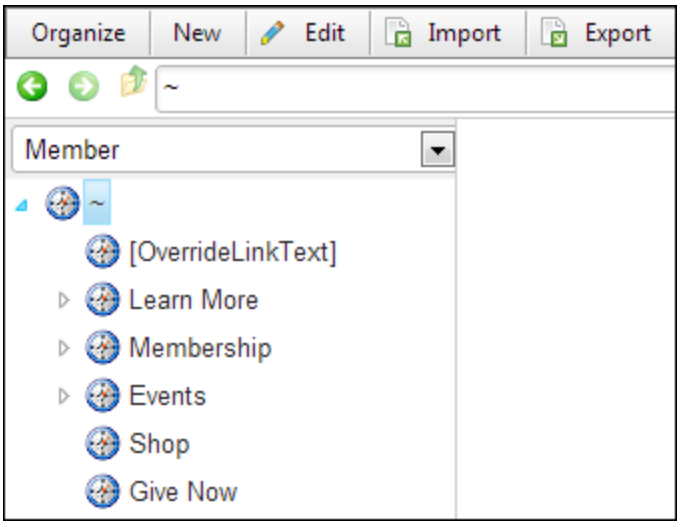
4. Click Save. The Status section header reports Working.
5. Click Preview on the toolbar to check your changes. You can correct any issues before publishing.
6. Click Publish on the toolbar.
7. Click OK. A window is displayed that reports the publishing success.
8. Click Close.

Adding new menus and task list items

Do the following to add new menus and task list items.

Go to RiSE > Site Designer > Manage sitemaps:

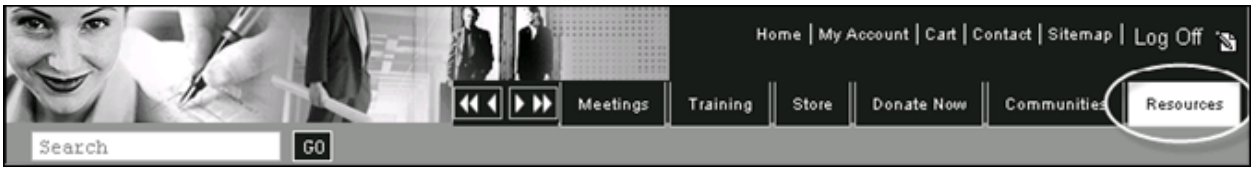
1. Select a site you want to modify in the drop-down list.
2. Select the navigation item (parent) that you want your new item (child) to appear below. To add a new Resources tab to your site, select the top node on the sitemap:



3. Click New > Website Navigation Item. Specify the new item's Properties, Options, and Access Settings.
4. Drag and drop to change the order of menus and task items, if necessary.

   Tip: Dropping an item on top of another item places the first item as a subordinate of the second item. To move an item up or down in a list, drop the item onto the dotted line that is temporarily displayed between items during the move.
5. Click Save. The Status section header reports Working.
6. Click Preview on the toolbar to check your changes. You can correct any issues before publishing.
7. Click Publish on the toolbar.
8. Click OK. A window is displayed that reports the publishing success.
9. Click Close.
10. The Status section header reports Published, and you can follow the URL link to see the changes on the live site.

    For example, this Resources tab was placed at the bottom of the sitemap, which made it the last tab on this website:



Concept: sitemaps and navigation items

Every iMIS content management website has a corresponding sitemap, in which you define a hierarchy of navigation items. Each navigation item defines the behavior of a single link to a web page of some sort, which can be:

- A content record located anywhere in the Content Designer content folder hierarchy. At run time on the website, IIS provides the rendered .aspx version of the most recently Published version of that content record.
- An ASI-developed dynamic web page that is available for use on all iMIS content management websites. Some of these pages provide standard website functionality such as a dynamic Sitemap page, while others provide specific features from the Public view of iMIS.
- A manually coded .aspx or .html file located anywhere in the IIS Physical Path associated with the IIS application that is used for hosting iMIS content management websites.
- A page located on an external website completely outside of the iMIS content management environment.

You can nest navigation items inside of other navigation items, creating a hierarchical structure. The structure that you create for the sitemap hierarchy is very important for two reasons:

- This is what the system dynamically renders as the structure of a Sitemap page on iMIS content management websites.
- The position of a navigation item in the hierarchy (the root node is level 0 of the hierarchy) determines whether that navigation item is automatically displayed in the various navigation areas of website pages. This automated display can be suppressed on a per-navigation item basis, and you can force a navigation item to be displayed in specific

navigation areas even if it would not normally be displayed there by the automated display handling specified in the definition of each navigation area.

The specific ASI-developed control used in the website's master page for the rendering of each navigation area also affects whether navigation items are rendered in the various navigation areas. For more information, refer to Defining navigation areas and breadcrumb areas.

The website's sitemap is automatically created when you define a new iMIS content management website, and is given the same name as the website. Currently, iMIS content management supports one sitemap per website. You cannot delete or change the name of a sitemap. Instead, you define sitemaps by adding and removing navigation items, rearranging navigation items in the sitemap hierarchy, and changing the definition of individual navigation items.

Note: In content records, you can also hard-code links to other content records or external content by using ContentReference and ContentLink iParts, but unlike navigation items, these hard-coded links cannot be dynamically displayed or hidden by the system. Instead, they are static links that are always visible in rendered pages.

Configuration options: sitemaps (navigation items)

These fields control the properties of the navigation items within each sitemap defined in the system.

Go to RiSE > Site Designer > Manage sitemaps:

Select a sitemap from the drop-down list, and then do one of the following:

- Select New > Website Navigation Item.
- Click Edit.

Tip: The Access Settings security options are the same throughout iMIS (see Using Access Settings). For best performance, use Preconfigured security sets.

Tips

- Choose which sitemap to edit by using the drop-down list above the sitemap tree.
- | Red bars next to navigation items indicate a Working state (unpublished).
- Drag and drop navigation items in the sitemap tree to reorganize them:
- Child position: Drop navigation item A onto navigation item B to make A subordinate to B (A becomes a child of B, and B is the parent of A).
- Sibling position: Drop navigation item A into the space below navigation item B to make A follow B at the same level (A becomes a sibling of B). A dotted line appears below B.
- URL paths for navigation items map relative to the IIS website root to which this sitemap's website is mapped in the Properties section of the Manage websites window. Several websites can map to the same IIS website root, and some of the properties that you define in this window need to be unique across all sitemaps that ultimately map to the same IIS website root. Therefore, it helps to identify which other websites might share the same IIS website root when working with this window.

  Caution! The sitemaps for Core Sites and Sample Sites are protected for use by iMIS. The default Document System permissions for these sitemaps permit editing by SysAdmins only.

  This navigation item is a break

  Defines the navigation item as a special break item that:

- Is rendered as a simple horizontal line in the secondary navigation area of an iMIS content management website
- Disables all other definition fields for the navigation item
- Creates system-generated values for the Navigation Link Text and Navigation Folder Name

  When cleared, all definition fields for the navigation item are enabled.

  Status

Specifies whether this definition object is in a Working, PublishPending, Submitted, Published, Inactive, or Active state. Click the expand icon to view further details, including who created the record, who modified it last, and dates of these changes.

- Content records in a Working state have been saved within the iMIS database, but the latest changes have not been made active on the associated iMIS content management websites by the associated publishing servers and their corresponding iMIS publishing service (AsiPublishing15). The Publish command on the toolbar queues the content record to the associated publishing servers, during which the content record is in a PublishPending state and can be viewed in the Pending Requests detail for the associated publishing servers. After each publishing server has successfully processed the publishing request, the latest changes become visible on the associated websites and become active within iMIS, both of which are denoted by the Published state.

  If an iMIS user does not have content authority group (CAG) Content Approver permissions, they will see a Submit command instead of a Publish command. The Submit command queues a publishing request to the Content Designer Task List of all content authority group members who have Content Approver permissions. Alternatively, if workflow is enabled for the parent content folder, only those members of the content folder's assigned content authority group who have Content Approver permissions. Only a person with Content Approver permissions in at least one content authority group can actually publish content records.

- For all other definition objects, the publishing process is less complex and does not involve content authority group permissions, publishing servers, or the iMIS publishing service. When the object is in a Working state, the latest changes have been saved within the iMIS database, but they have not yet been made active within iMIS. The Publish command makes the latest changes active within iMIS.

- Websites in an Inactive state are offline so that browsers cannot view the website content, and instead see a 503 error (Service Unavailable) from IIS. Selecting the Is this website active? checkbox in the Status section of the website's definition puts the website in an Active state, enabling browsers to view the website content. Clearing the checkbox puts the website in an Inactive state.

Configuration options: Properties tab (Manage sitemaps)

Navigation Link Text

Specifies the anchor text that will be used for the links representing this navigation item throughout the iMIS content management website. This value must be unique among all sibling navigation items in the sitemap tree.

Navigation Folder Name

Specifies the name of this navigation item within the sitemap tree. This value is automatically generated by the system to be a valid hierarchical part of a URL (the path of folder names in a long URL) when you enter the Navigation Link Text. For example, if there are spaces in the value that you specified in the Navigation Link Text field, they are automatically converted to underscore characters in this field.

If you manually change this value, you must use a value that web browsers will correctly parse as a valid hierarchical part of the URI scheme used in URL syntax. You must also ensure that this value is unique among all sibling navigation items in the sitemap tree.

Tool Tip Description

Specifies short help text that pops up when the user hovers over the link in the navigation. Leave it blank if you do not want to show a Tool tip.

Content or URL to Link to

Specifies the target of the navigation link. You can specify an absolute URL to any website, a relative URL to pages within the website associated with this sitemap, or you can click select to browse for a content record. For relative URLs, use a tilde character to represent the IIS website root where this sitemap's website is located. For example, ~/ThisWebsiteFolder/Default.aspx

Note: If a navigation item is selected as the Home link for a website (Manage sitemaps, Options tab), be sure to enter Default.aspx as the Content or URL to Link to (Manage sitemaps, Properties tab). Default.aspx is the default page used when a link does not specify a page.

You can specify this value in the following ways:

- Click the select link and select any content record defined in the system.
- Specify a root-relative URL to a manually coded .aspx or .html file located anywhere below the root (~) of the physical path associated with the IIS application or IIS website that hosts your iMIS content management websites. For example, ~/handCodedPages/myPage.aspx.

  Note: Be sure to use web-style forward slashes (/) for the segment delimiters.
- Specify an absolute path to a manually coded .aspx or .html file located anywhere in the IIS folder hierarchy of the Default Web Site. This is useful for linking to files that are outside of the physical path of the IIS application or IIS website that hosts your iMIS content management websites. The root of the absolute path is the IIS Default Web Site, which must be represented by a single forward slash (/), and you must also use forward slashes to delimit the path segments. For example, the absolute path to an .aspx file located in a first-level virtual directory named SiteX would be /SiteX/externalPage.aspx.
- Specify an absolute URL to a page on an external website. For example, http://-docs.imis.com/.

  URL Parameters

  Specifies a string to append to this navigation item's URL. The string can be one or more parameters that will pass data to the parameter-collection web user control in the content type associated with a custom iPart that is used in the content record to which this navigation item points. None of the standard iMIS iParts use parameter-collection web user controls that accept this type of input in their associated content types. The specific control is defined in the URL to the control or page that is used to collect parameters for content items of this type field in the iPart's corresponding content type.

  Each parameter must contain a name and a value. Separate multiple parameters with an ampersand. For example, name1=value1&name2=value2.

  Breadcrumb Name

Specifies the text displayed for the navigation item in a breadcrumb path, if breadcrumbs are enabled for the iMIS content management website. This text must be unique among all sibling navigation items in the sitemap tree.

Hide on this page

Prevents the Breadcrumb Name for this navigation item from being displayed in a breadcrumb path. When cleared, the Breadcrumb Name will be visible in breadcrumb paths.

Override Content Title

Specifies the text to use to override the title bar title. This title appears on the content page pointed to by this navigation item. Leave it blank to allow the content's assigned title to display.

Navigation Code

(for use by developers)

This field allows developers to hard-code links to this navigation item without worry about the text or location of the navigation changing later. It specifies a URL alias for the navigation item that will stay the same even if this navigation item is moved within the sitemap tree or if the Navigation Folder Name is later changed. Navigation codes allow you to identify navigation items without the need to refer to the full path or underlying GUID for that item. They can be used in a variety of ways, including:

- Creating links in IQA query results
- Creating links in search results for the Common Search iPart
- Creating target links in ASPX web pages to redirect users to another page
- Creating links in the Big Button Panel iPart

A navigation code must be unique among a given sitemap. If a navigation code is unique among all navigation items that share the same IIS website root, which is defined from Site designer > Manage websites > Properties of a website, then it can be used in a URL without the website name (such as http://mydomain.com/StoreHome instead of http://mydomain.com/PublicSite/StoreHome).

Image URL

Enter an image URL or select an image to display next to the navigation item.

CSS Class

Specifies one or more CSS classes to apply to the navigation item. For example, class1 class2.

Folder containing template content

Defaults to Inherit from parent, which you can disable to specify a different folder, such as for content that is shared across areas or websites.

Configuration options: Workflow management tab

- Remove this navigation if it has not been published within n days – Specifies the expiration interval for this navigation item. When expired, the navigation item is no longer rendered on iMIS content management websites, but the navigation item remains in the system with a status of Expired. Manually republishing the navigation item makes it appear again on the iMIS content management websites and resets the expiration interval.

  The expiration interval can be overridden by specifying a value of 0.

- Notify this person 10 and 5 days before removing this navigation – Specifies the iMIS user that should receive email notifications before the navigation item expires. This field is enabled only when the preceding field has a non-zero value. The list comprises only those people who have Navigation Editor content authority group permissions in at least one content authority group.

Configuration options: Options tab

Specifies how the website links created by the navigation item should behave when rendered in a web browser.

Open the link in a new window

Link should be secure (HTTPS)

Makes the rendered version of a content record that is the target of this navigation item be displayed through a secured connection (SSL) to the web server, but only if both of the following two conditions are also met:

1. The website associated with this navigation item's sitemap has a valid https:// URL listed in the Secure URL(s) pointing to the IIS website root field in their definition.

   Important: Restart IIS whenever you change the Secure URL(s) pointing to the IIS website root setting. Note that localhost is not a valid Secure URL.

2. You have installed valid site certificates in IIS for each web server that hosts this website.

   If the content record that is the target of this navigation item ends up being served by an iMIS content management website that does not meet the above criteria, the content record will be displayed through a non-secured connection (http://).

   Note: If other navigation items point at the same content record, but those other navigation items do not have this checkbox selected, they will not display the content record through a secured connection. However, if the Content is secure (https://) checkbox is selected on the target content record itself, then it doesn't matter how this checkbox is set on any navigation items that point at the content record—the content record will always be displayed through a security connection regardless of which link is used to get to the content.

   This navigation item is the Home link for the sitemap

   This navigation item is active

   Check this box to make this navigation functional on the website. Uncheck it to stop this navigation item from functioning on the website.

   Important: Although active, the navigation item cannot appear on the site if it is hidden by the following option.

   This navigation item is hidden

   Hides the navigation item from the end user, per the automated display rules defined in each navigation area. This option does not apply to any navigation item selected to be

displayed in the Auxiliary and Footer navigation areas. If you do not want a navigation item to appear in those areas, you must clear the Auxiliary and Footer checkboxes from the Show in the following navigation area options. For more information, see Fields: websites.

Note: The Primary Navigation ignores the sitemap order for any navigation item marked as This navigation item is hidden. To enable the sitemap order, uncheck this property.

This navigation item is expanded by default

This navigation item only displays for unauthenticated users

Hides the navigation item from authenticated users. This option is best used on public-facing iMIS-generated websites. For example, enable this option to display a Create Account link only to unauthenticated users.

Show in the following navigation areas:

Specifies in which navigation areas this navigation item is displayed. This applies to the top level of the navigation hierarchy only (the one that is always visible). The navigation item can still be used as a sub-navigation item whether this option is selected or not.

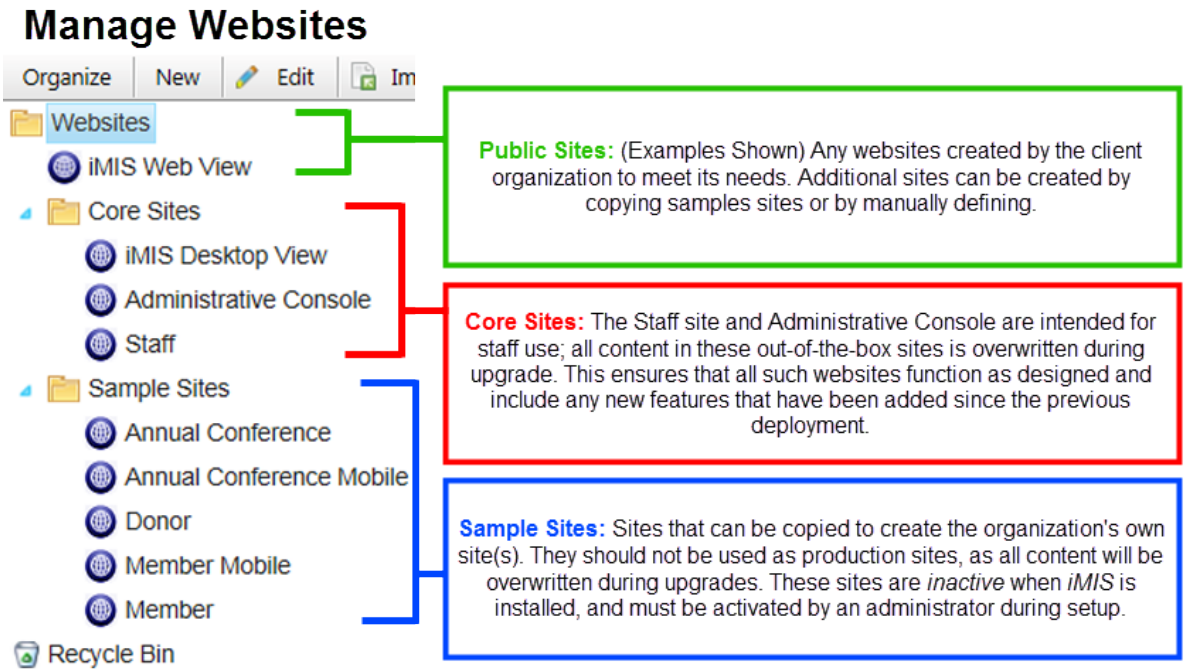
- This option is the only way that you can make a navigation item appear in the Auxiliary or Footer navigation areas. Note that if the link is flagged as a hidden navigation item, the link is still displayed in the Auxiliary and Footer navigation areas if selected here. If you do not want a navigation item to appear in those areas, you must clear the Auxiliary and Footer checkboxes.
- Remember that these navigation areas are defined in iMIS, but not all website master pages will necessarily include them.
- The Inherit from Parent checkbox shows this navigation item if the parent is also displayed.

Managing websites

Getting started: website management

Website management is the process of configuring and maintaining the appearance, navigation structure, and content authoring environment for your iMIS websites. Website management comprises the following activities:

- Defining the appearance and navigation structure of websites.
- Defining the infrastructure for the web content authoring environment.
- Performing website maintenance



The copy website functionality of iMIS will only copy site-specific content from a Sample Site. All navigation that points to shared core content will continue to point to the same shared core content in the copied website. Only when an iMIS client decides to modify any shared core content will they be required to save the modified content into the new Shared Content folder (or website-specific folder where appropriate).

Putting it all together

Website management comprises three general workflows:

- The process of defining the appearance and navigation structure of your iMIS content management websites entails the following actions, which should be performed in the order shown:

1. Defining website look and feel. Choose a specific mix of available master pages and themes.
2. Defining sitemaps (navigation items) to build the navigation structure of your website.
3. (optional) Defining shortcut URLs to enable the use of short, reader-friendly links to important pages of your website.

- The process of creating the infrastructure to support the people who perform web content authoring entails the following actions, which should be performed in the order shown:

1. Defining content authority groups (CAGs) to grant various content authoring permissions to the people who will perform web content authoring in your organization.
2. Defining content folders to organize the creation of content records.
3. (optional) Enabling workflow for content authoring for specific content folders to enable better coordination of web content authoring efforts among the people responsible for developing and maintaining the content records in those folders.
4. (optional) Defining content layouts to extend the basic set of content layouts provided with iMIS content management, thereby enabling new arrangements of the iParts in a content record.
5. Defining tags and defining tagged list formats (see Defining tagged list formats) for use in content record properties and certain types of iParts, to enable tag-filtered searches and the creation of dynamic content that changes automatically based on the tags assigned to content records in the system.
6. (optional) Defining iMIS content management user-defined fields (UDFs) to enable capturing additional properties of the content in content records, which can enable iMIS content management website visitors to perform more powerful website searches, and can provide additional filtering and sorting of the output of ContentTaggedList iParts.
7. (optional) Importing content from a staging server if you choose to develop and test new content and navigation outside of your production environment.

- The process of website maintenance entails the following actions, performed as needed:
- Managing the priority of pending publication requests|topic=Website maintenance to speed up a publishing request that is behind many others in the publishing queue.
- Viewing CM reports|topic=Website maintenance to gain information about your websites and web content authoring efforts.

Website appearance and structure definition

Website appearance and structure definition is the process of defining the look and feel and the navigation of your iMIS content management websites.

Define website look and feel

The initial look and feel of an iMIS content management website is chosen when the administrator first defines iMIS content management websites. However, anyone with access to the Site Designer tool can subsequently change the look and feel of an existing website in various ways by using the Look and Feel section of the website's definition:

- You can selectively mix and match master pages and themes that are listed in their respective drop-down lists. This makes it easy, for example, to share a customized master page among several different websites.
- You can enable or disable the breadcrumb navigation on the site.

You can also use the Navigation Areas section of the website's definition to select the navigation areas that are used on the site, which can change the links that appear on the website according to the definition of each navigation area.

To customize master pages, see Integrating hand-built master pages and themes with CM.

To customize navigation areas, see Defining navigation areas and breadcrumb areas.

Configuration options: websites

These fields control the properties of websites that are defined in your system.

Go to RiSE > Site Designer > Manage websites:

Do one of the following:

- Select New > Website.
- Select an existing website.

  Tips

- The Access Settings security options are the same throughout iMIS (see Using Access Settings). For best performance, use Preconfigured security sets.
- Some of the file locations described in this section are expressed as root-relative URLs based on the root (~) of the physical path for the IIS application or IIS website that hosts the iMIS content management website you are creating. For example, ~/App_Themes, which in a default installation of an iMIS application server would be C:\Program Files\ASI\iMIS\Net\App_Themes.

  Status

  Specifies whether this definition object is in a Working, PublishPending, Submitted, Published, Inactive, or Active state. Click the expand icon to view further details, including who created the record, who modified it last, and dates of these changes.
- Content records in a Working state have been saved within the iMIS database, but the latest changes have not been made active on the associated iMIS content management websites by the associated publishing servers and their corresponding iMIS publishing service (AsiPublishing15). The Publish command on the toolbar queues the content record to the associated publishing servers, during which the content record is in a PublishPending state and can be viewed in the Pending Requests detail for the associated publishing servers. After each publishing server has successfully processed the publishing request, the latest changes become visible on the associated websites and become active within iMIS, both of which are denoted by the Published state.

  If an iMIS user does not have content authority group (CAG) Content Approver permissions, they will see a Submit command instead of a Publish command. The Submit command queues a publishing request to the Content Designer Task List of all content authority group members who have Content Approver permissions. Alternatively, if workflow is enabled for the parent content folder, only those members of the content folder's

assigned content authority group who have Content Approver permissions. Only a person with Content Approver permissions in at least one content authority group can actually publish content records.

- For all other definition objects, the publishing process is less complex and does not involve content authority group permissions, publishing servers, or the iMIS publishing service. When the object is in a Working state, the latest changes have been saved within the iMIS database, but they have not yet been made active within iMIS. The Publish command makes the latest changes active within iMIS.
- Websites in an Inactive state are offline so that browsers cannot view the website content, and instead see a 503 error (Service Unavailable) from IIS. Selecting the Is this website active? checkbox in the Status section of the website's definition puts the website in an Active state, enabling browsers to view the website content. Clearing the checkbox puts the website in an Inactive state.

Configuration options: Properties tab (Manage websites)

Name/Title of this Website

Specifies the name of this website within iMIS and iMIS content management windows and reports. This value also appears as the default browser window title when viewing the home page of the website, but you can override this default browser-facing website name in the root navigation item of the website's associated sitemap (by using the Override Content Title field).

URL Name of this Website

Specifies the unique site ID of this website as a hierarchical part of the complete URL to this website when the IIS application or IIS website used for iMIS content management is hosting more than one iMIS content management website.

This value is automatically generated when you enter the Name/Title of this Website to ensure that it will parse as a valid hierarchical part of a URL. For example, if there are spaces in the value that you specified in the Name/Title of this Website field, they are automatically converted to underscore characters in this field.

If you manually change this value, you must use a value that web browsers will correctly parse as a valid hierarchical part of the URI scheme used in URL syntax. You must also ensure that this value is unique among all iMIS content management websites.

URL(s) pointing to the IIS website root

Specifies one or more URLs that resolve to IIS applications or IIS websites that host your iMIS content management websites. The staff or consultants who install iMIS content management on your organization's web servers should provide you with a list of URLs that correspond to each web server.

The URLs that you specify in this field determine exactly which servers will host this iMIS content management website. Use commas to delimit each URL after the first one.

For example, if you want this website to be hosted on three external web servers in different geographic locations, you would specify the three URLs that resolve to the IIS application or IIS website used for hosting iMIS content management websites on each of the three servers. This requires that iMIS content management has already been installed on each server.

Secure URL(s) pointing to the IIS website root

If you have installed security certificates in IIS on the servers that host this website, specify the secure versions of same URLs that you entered in the URL(s) pointing to the IIS website root. The number and order of this list must exactly match the URL(s) pointing to the IIS website root field.

The IIS website root (above) points to more than one CM website

Appends the URL Name of this Website to each of the URLs defined in the URL(s) pointing to the IIS website root field. For example, if the URL(s) pointing to the IIS website root is http://www.example.com/, and the URL Name of this Website is xyz, then the full URL to this website would be http://www.example.com/xyz.

When cleared, the URL(s) pointing to the IIS website root cannot be used for any other iMIS content management website except this one.

Make this website the default

Makes this iMIS content management website the website that is displayed when a browser requests only the URLs specified in URL(s) pointing to the IIS website root or Secure URL(s) pointing to the IIS website root without also appending the segment corresponding to the value specified in the URL Name of this Website. You cannot clear this box directly, because there must always be one such iMIS content management website that is specified as the default to display if a URL does not include the URL Name of the website. To clear this box you must edit the definition of another website that shares the same website root URL and select this checkbox in the other website's definition.

Note: This checkbox does not need to be selected if the iMIS content management website is the only one being hosted by the IIS application or IIS website that is (indirectly) specified by the URL(s) pointing to the IIS website root field. However, if you later create a second iMIS content management website that will be hosted by the same IIS application or IIS website, the system will automatically select this checkbox for the original iMIS content management website.

Website-specific parent content folder

Specifies the site-specific folder that contains the content that is included when the website is copied. When a new website is created, the field is hidden until you save the website and then the path is auto-populated with the website name (@/website name). On existing websites, the field defaults to blank. If you choose to copy this website later, only the content within this site-specific folder will be copied.

Advanced

This section includes options for the integration of third-party APIs.

- Google Analytics script – If you are using Google Analytics to track website activity, paste the script provided by Google Analytics. For more information, refer to Tracking your site with Google Analytics.

Configuration options: Look and Feel tab

Folder containing template content

Specifies the relative Document System path beneath the root of the content folder hierarchy (@) to the folder that contains the content records that define the content areas of a template. Use the format @/etc/etc. You can use this field to reuse customizations you might have made to the content area files for another website that shares the same template design, which spares you maintaining multiple sets of the same customized content records.

MasterPage/Template to use for the site's layout

Specifies the ASP.NET master page to use for the layout of the entire website or special types of website pages as indicated by the field name. You can use this site's layout field to reuse a customized master page among several different websites, rather than maintain multiple versions of the same customized master page. The master pages shown in the list are the contents of the ~/Templates/MasterPages folder.

Theme (colors, fonts, etc.) to use for the site's "look and feel"

Specifies the ASP.NET theme to use for the visual look and feel of the website. You can use this field to reuse a customized theme among several different websites, rather than needing to maintain multiple sets of the same customized theme files. The themes shown in the list are the contents of the ~/App_Themes folder.

MasterPage/Template to use for "Print this page" type functionality

Specifies the layout to use to render print-friendly page views, such as called by the printer icon:

MasterPage/Template to use for Text Only requests

Specifies the layout to use to render text-only page views, such as called by the text icon:

MasterPage/Template to use for Pop-up windows

Specifies the layout to use to render pop-up windows, such as used by the Send this page icon:

Use breadcrumbs on this site

Enables breadcrumbs (the hierarchical path of links to the current content) that appear directly between the global navigation and the page contents.

Configuration options: Navigation Areas

This area lists all of the navigation areas that are defined for use in the iMIS content management environment. The Edit icon on the list (✎) enables you to add new navigation areas to the system, delete existing navigation areas, or select existing navigation areas to change their properties.

The specific navigation areas that you select here determine which navigation areas are available for use by the navigation items that you define in the sitemap for this website. You must ensure that the master page used by this website contains elements that support all of the navigation areas that you select.

The master page of every template supports the four default navigation areas (Primary, Secondary, Auxiliary, and Footer). If you select any navigation area for use in this website besides these four defaults, you must ensure that the master page used by the website contains the elements needed to support that navigation area.

iMIS can support a maximum of 30 navigation areas, and each navigation area must have a unique Name.

Caution! Avoid deleting a navigation area, because doing so will remove it from the entire system, which affects all iMIS content management websites in the system. When you delete a navigation area, all navigation items that are currently defined to be displayed in that area will still appear in that navigation area in rendered website pages. The master page contains a framework for the navigation area, and published navigation items still contain the properties that make them be displayed in the deleted navigation area. The navigation area will not completely disappear from all of your rendered websites until you edit and save every navigation item in the system that currently uses it.

When defining a navigation area, the following properties are displayed. Not all of these properties are actually used by every navigation area. The specific properties that are used depend on which of the three ASI-developed controls are used in the website's mas-

ter page to render the navigation area. For more information, refer to Defining navigation areas and breadcrumb areas.

- Navigation Pane Code – (read only) Specifies a unique identifier that must be used in the NavigationPaneCode attribute of various asi: and asiweb: controls used in master pages to support navigation areas. When you add a new navigation area, this code is displayed as 0 until you click Save and then select the navigation area to view its properties. (For more information, refer to Defining navigation areas and breadcrumb areas.)
- Static Display Levels – Specifies how many levels of the sitemap hierarchy (which is zero-based) to display by default in this navigation area, based on the value of the Starting Level field. For example, if this value is set to 2 and Starting Level is set to 3, then the 3rd and 4th levels below the sitemap root are displayed in the navigation area.

  Only navigation items that are active and not hidden are displayed. Controlled respectively by the fields This navigation item is active and This navigation item is hidden, both located the Options section of the definition for a navigation item.

  If the range specified by this value comprises more than one level, the rendered list of navigation links is by default collapsed to the first level, requiring users to click one of the parent links in the range to expand that node to show the child links. This default behavior can be overridden on a per-navigation-item basis by selecting the This navigation item is expanded by default checkbox in the Options section of the navigation item's definition.

  Note: This value is ignored by the asi:PageNav and asi:PageNavR controls that (by default) render the Primary navigation area, and by the asiweb:NavigationList control that (by default) renders the Auxiliary and Footer navigation areas.
- Dynamic Display Levels – Specifies how many additional levels in the sitemap hierarchy to display when the lowest level of the range specified in Static Display Levels is expanded, either by user action or because the This navigation item is expanded by default checkbox is selected in the Options section of the definition for a navigation item.

  Only navigation items that are active and not hidden are displayed. Controlled respectively by the checkboxes This navigation item is active and This navigation item is hidden, which are both located in the Options section of the definition for a navigation item.

Note: This value is ignored by the asi:PageSubNav control that (by default) renders the Secondary navigation area, and by the asiweb:NavigationList control that (by default) renders the Auxiliary and Footer navigation areas.

- Starting Level – Specifies the level of the sitemap hierarchy (which is zero-based) that constitutes the first (initial) level of the Static Display Levels field. The value 1 corresponds to the first level immediately beneath the sitemap root (~). For example, if this value is set to 3 and Static Display Levels is set to 2, then the 3rd and 4th levels below the sitemap root are displayed in the navigation area.

  Note: This value is currently ignored by the following ASI-developed controls for rendering content areas: asi:PageNav, asi:PageNavR, asi:PageSubNav, and asiweb:NavigationList. As a result, this field has no effect on navigation area behavior in the current release.

Defining shortcut URLs

iMIS supports the ability to define friendly URL shortcuts, so that an easy-to-remember URL redirects to a specific page. You can create these shortcuts for any of your websites and link the shortcuts to a URL or content record.

Do the following to create a new shortcut URL.

Go to RiSE > Site Designer > Manage shortcuts:

1. Click Add New.
2. Provide values for the shortcut URL:

1. Select the website you are creating a shortcut for in the For Websites drop-down list.
2. Select the shortcut you want to use in the Shortcut drop-down list, or enter a new Shortcut name. The Shortcut name should not be the same as the name of a website or a top-level folder in Content designer.
3. Enter the URL or content record in the URL or Content Record field.
4. Enter a description of the shortcut in the Description field.

3. Click Save.
4. You can click the Shortcut to test the link.

   For example, create an Events shortcut that points to the Conference List page. You can do this either by entering the URL to the page (~/Events/Conferences/ConferenceList.aspx) or by selecting the content record (@/Events/Conferences/ConferenceList). After inserting the shortcut, the link www.yourwebsite/Events automatically displays www.yourwebsite/Events/Conferences/ConferenceList.aspx.

   By default, shortcuts apply to all of your websites. For example, if you define an Events shortcut for all sites, the shortcut always displays the same content record, regardless of which website the user is visiting, www.yourwebsite/events or www.otherwebsite/events. But you can also define shortcuts for a specific site. For example, you might want your mobile website to display a different content record for www.mobilesite/events. In that case, select your mobile site from the For Website dropdown list and point the Events shortcut to the content record you prefer.

   Note: Some system shortcuts cannot be edited or deleted, but they are listed for your reference. Other shortcuts are reserved for use in the sample sites and can be edited but not deleted.

   #### Configuration options: shortcut URLs

   These fields control the properties of shortcut URLs that are defined in the system.

   Go to RiSE > Site Designer > Manage shortcuts:

   Do one of the following:

- Click Add New.
- Click Edit selected to an existing, selected shortcut.

   For Websites

   The All Sites option applies the shortcut to all websites in the system. Select a specific site to only apply the shortcut to a single website. If you enter an iMIS URL for the

shortcut, it's important to ensure that all of your sites have the specified relative navigation item path in their respective sitemaps.

Shortcut

The name of the shortcut. Do not enter the name of an existing folder path for the website.

URL or Content Record

Enter a URL or select a content record to display when a user navigates to the shortcut. If you enter a URL, replace the site's root URL with ~, for example ~/Events/Conferences/ConferenceList.aspx.

Description

(optional) Enter a description for the shortcut.

URL rewriting in iMIS

When someone visits your website, iMIS uses a URL Rewriter to determine which page to display as they navigate your site. The Rewriter parses the URL and then looks for a matching definition for the following elements, which are resolved in the following order:

1. Virtual directory name.
2. Website URL:

1. Go to RiSE > Site designer > Manage websites.
2. Select a website.
3. See the value for the URL Name of this Website field.

3. Links to a content folder that contains a content record with a Publish File Name of Default.
4. URL shortcuts for a particular website:

1. Go to RiSE > Site designer > Manage shortcuts.
2. See the value for the Shortcut field.

5. URL shortcuts set up for All sites:

1. Go to RiSE > Site designer > Manage shortcuts.
2. See the value for the Shortcut field.

6. Navigation path:

1. Go to RiSE > Site designer > Manage sitemaps.
2. Select a navigation item.
3. (Properties tab) See the value for the Content or URL to Link to field.

7. Navigation codes:

1. Go to RiSE > Site designer > Manage sitemaps.
2. Select a navigation item.
3. (Properties tab) See the value for the Navigation Code field.

   For example, consider the URL http://mysite.com/mbr/events. If you have a URL shortcut named events and a navigation code named events, the page associated with the URL shortcut is rendered, instead of the page associated with the navigation code.

Content Designer

Content infrastructure definition is the process of defining the objects that secure, organize, and collect your content, and that assist with managing web content authoring activities.

All content records in the Core Content and Sample Websites content folders are protected as System content records and cannot be edited or deleted. If you want to update a System content record, create a copy of it, and then edit the copy. Be sure to also update any navigation items or shortcuts that point to that content record.

The sitemaps for Core Content and Sample Sites are managed by ASI and should not be modified on your system. These sitemaps currently permit editing but any changes will be overwritten by future upgrades.

Tip: The Access Settings security options are the same throughout iMIS (see Using Access Settings). For best performance, use Preconfigured security sets.

Content authoring

Web content authoring is the process of creating page-level content for your content management websites. Web content authoring comprises the following activities:

- Defining the content records that populate the content areas of your website pages, optionally using workflow and Surf-to-Edit features to help with this task.
- Managing images that you use in your content.

Before you begin

You cannot perform web content authoring tasks until after the following tasks are performed:

- Defined content authority groups (CAGs) to control who can define/approve content records and upload images and other file types for use in content records
- Defined content folders in which to create your content records
- (optional) Assigned content authority groups to specific content folders to enable workflow for the content records in that folder
- (optional) Defined tags and tagged list formats for use in your content records
- (optional) Defined iMIS content management user-defined fields (UDFs) for use in your content records

Putting it all together

Web content authoring includes the following actions, performed as needed:

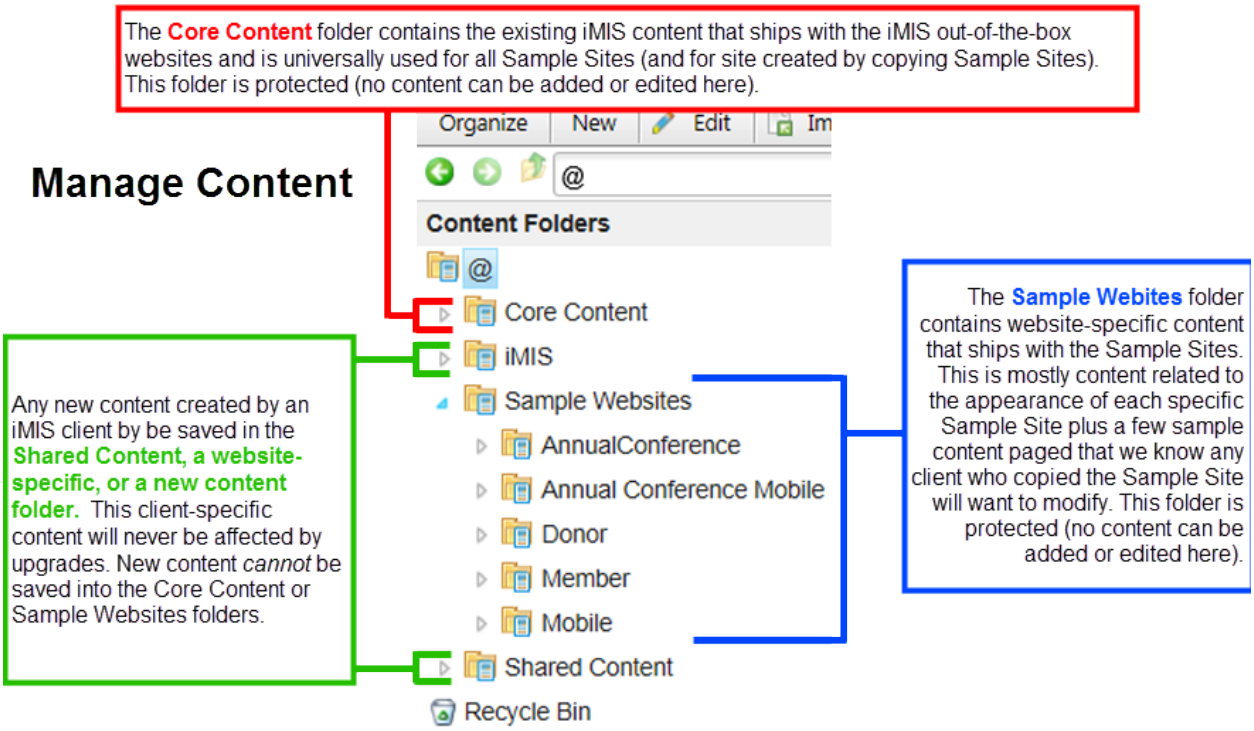
- Managing content records, each of which is the source of a content area on a rendered web page. You can define these on an ad hoc basis as needed, or by tracking your current and available authoring work in your Content Designer Task List:
- Revise pages for your website by adding one or more iParts to a content record or configuring existing iParts in the content record, or both. Save the changes and then publish

the content record. In moments, the changes become live on all iMIS content management websites that use that content record. You might need to refresh the page in your browser to see the changes.

- If you're creating a brand new page, you must link the content record to a navigation item in the website's sitemap to add the published content record to the website. This is typically done by the person who manages the website.
- Many iParts come with iMIS content management, and your iMIS implementers might have added custom iParts as well. To learn about iParts and what they do, see iPart Essentials, iPart-based Features, and iPart Reference.
- Managing images for use in content records.
- Approving content records for publication or deletion by authors who do not have Content Approver permissions.
- Browsing your website to review its content and using Surf-to-Edit (see Revising website content with Surf-to-Edit) to edit the underlying content records (or to log a change request for a content revision if you do not have Content Editor permissions for a given content record).

  Note: Full users can perform all web content authoring tasks. Full, Casual, and Public users can define and revise content by using the Surf-to-Edit feature of iMIS content management.

Managing content



Defining content records

Do the following to define content records.

Go to RiSE > Content Designer > Manage content:

Select the content folder in which you want to create the content record. Do one of the following:

- Select New > Website Content to create a new content record.
- Click Edit to modify an existing content record.
- Select Organize > Delete to delete an existing content record.

The following are the basic parts to creating a content record, which should be performed in the following order:

1. Enter a Title for the content record.
2. Enter a Publish File Name for the content record.

3. (Definition tab) Select a layout in the Content Layout drop-down list.
4. Click add content to add one or more iParts to each iPart zone.
5. Select the iPart you want to use. Click OK.
6. Configure each iPart to define its individual content. To modify an existing content record:

1. Select the content record.
2. Click Edit.
3. Click Configure on the iPart.
4. Configure the iPart.

7. Provide the following for each content record:

- Definition
- Properties
- Current Tags
- Access Settings

8. If the parent content folder has been enabled for content authoring workflow, you can optionally change the default settings:

1. Select the parent folder.
2. Click Edit.
3. (Workflow Management tab) Modify the content record.

   You can also click and drag iParts to rearrange them within an iPart zone or between different iPart zones. It's also possible to copy or move existing iParts from one content record to another.

   Note: All content records in the Core Sites and Sample Websites content folders are protected as System content records and cannot be edited or deleted. If you want to update

a System content record, create a copy of it, and then edit the copy. Be sure to also update any navigation items or shortcuts that point to that content record.

Publishing content records

When you first create a content record, or when you make changes to an existing Published content record, that particular version of the content record is not visible on any iMIS content management websites until it is published. You have two publishing options:

- Save and publish immediately: Before closing the content record, select Save and Publish to make your changes immediately visible on all websites that use the content record.
- Save, then publish later: If you Save the content record without publishing, the content record is marked with a status of Working. To publish the content record, select it and then click Publish in the Document System toolbar.

  After publishing your content record, the status changes briefly to PublishPending, and then to Published once it has been fully rendered to an .aspx file on all web servers that host the relevant iMIS content management websites.

Copying or moving iParts to another content record

Do the following to copy or move an iPart to another content record.

Go to RiSE > Content Designer > Manage content:

1. Select the content record you want to move or copy.
2. Click Edit.
3. In the iPart header, click Copy To or Move To. The Document Browser window is displayed.
4. Select the content record to which you want to move the iPart.
5. Click OK.
6. Click Save or Save & Publish.

Copying or moving content records to another content folder

You can move content records into different content folders by dragging and dropping them into a different folder. Do the following to move content records into other content folders.

Go to RiSE > Content Designer > Manage content:

1. Select the content record you want to move.
2. Select Organize > Cut.
3. Select the content folder to which you want to move the content record.
4. Select Organize > Paste.

Do the following to copy content records into other content folders:

1. Select the content record you want to copy.
2. Select Organize > Copy.
3. Select the content folder to which you want to move the content record.
4. Select Organize > Paste.

When you move or copy a content record into a new content folder, you must republish it to make sure that the content record is made visible on all websites associated with the new content folder, as well as removed from all websites that were associated with the old content folder.

When you move or copy a content record that was originally in a workflow-enabled content folder (a content authority group is assigned to the content folder) into another workflow-enabled folder, the content record's assigned content owner remains unchanged if:

- The new folder's content authority group also lists the assigned content owner as a member.
- The assigned content owner has Content Editor content authority group permissions in the new content folder's content authority group.

If either of these conditions is false, then the assigned Default Owner of the new content folder’s content authority group is assigned as the new content owner for this instance of the content record.

The tags inherited from ancestors in the content folder hierarchy are recalculated based on the content record's new position in the hierarchy. Although the new inherited tags are visible immediately within the Content Designer tool, website searches for these tags will not find the content records until you republish them.

Reverting to an earlier version of a content record

Every time you publish a content record, the previously published version is saved as an Archived version. Do the following to revert to an older archived version.

Go to RiSE > Content Designer > Manage content:

1. Select the content record.
2. Click Versions.
3. Select an archived version
4. Click Revert. A warning message is displayed.
5. Click OK.
6. Click Close.

The archived version you select is turned into a new Working version at the top of the list, and all previous versions remain intact. When you close the window, the archived version is the version you'll now see in the content folder. As with any Working content record, you can publish the content record when you are ready to push it to your iMIS content management websites.

Preventing content records from expiring

Content records in a workflow-enabled content folder can be set to expire a certain number of days after they were last published. The content record's assigned content owner

receives several email notifications, and corresponding entries in their Content Designer Task List:

- Before a content record is due to expire.
- When it expires.
- After it has expired, if the system has not automatically deleted the content record upon expiration. For more information, refer to Fields: setup – workflow.

Do the following to set the content record expiration parameters.

Go to RiSE > Content Designer > Manage Content:

1. Select the content folder in which you are setting expiration parameters on content records.
2. Click Edit.
3. Select the Workflow Management tab.
4. Select an Authority Group to assign a CAG to the content folder.
5. Click Save and Cancel.
6. Select the content record for which you are setting expiration parameters.
7. Click Edit.
8. Select the Workflow Management tab.
9. Select a content owner in the Owner of this content list.
10. Specify a time for the content to expire in the Content is considered expired [n] days after last published field, or specify a date for the content to expire in the Content set to expire field.
11. Select the Automatically remove expired content? option.

    If you receive notice of an upcoming expiration, you can do the following to prevent the content record from expiring.

    Go to RiSE > Content Designer > View task list:

1. Click the content record's title in Content that has expired or will soon expire.
2. Click Publish. This republishes the content record, which restarts the expiration clock.

Manually deleting expired content records that were not auto-deleted

When a content record expires and the Automatically delete expired content? checkbox is selected in the Workflow Management tab of the content record's definition, the system automatically does the following:

- Sets the content record's status to Recycled.
- Moves the content record to the Recycle Bin.
- Removes the corresponding rendered .aspx file from IIS on all web server hosts to which the content record has been published.

However, if the Automatically delete expired content? checkbox is not selected and a content record expires, nothing happens until the content owner selects the expiration notice in the Content Designer Task List and clicks Delete Selected. This does the following:

- Sets the content record's status to Recycled.
- Moves the content record to the Recycle Bin.
- Removes the corresponding .aspx file from all web servers.

Purging or restoring deleted content records

A content record that has expired and been deleted is moved to the Recycle Bin at the bottom of the content folder hierarchy.

Go to RiSE > Content Designer > Manage content:

Do the following to permanently purge specific content records:

1. Select Recycle Bin.
2. Press Ctrl and select the content you want to permanently purge.
3. Select Organize > Purge.

Do the following to permanently purge all items:

1. Select Recycle Bin.
2. Select Organize > Empty the Recycle Bin.

Do the following to restore a deleted content record:

1. Select Recycle Bin.
2. Select the deleted content record to restore.
3. Click Versions.
4. Select the first Recycled version, or the desired earlier version.
5. Click Revert. The content record is moved to its original content folder and its status changes to Working. You must republish the content record to create a rendered version again on all associated iMIS content management websites.

   Note: If the content record's original parent folder no longer exists or is in the Recycle Bin, the restored content record is placed in the root folder (@) of the tree. You must move it into an appropriate content folder before you can publish the content record.

Troubleshooting

- You can edit content records with the Surf-to-Edit feature. Casual and Public users cannot perform the tasks described here because they cannot access iMIS content management. However, they can use the Surf-to-Edit feature to revise existing content records.
- You must have some or all of the following content authority group (CAG) permissions in at least one content authority group to which you belong:
- To create or edit content records, you must have Content Editor content authority group permissions.
- To publish content records without requiring approval from another person, you must have Content Approver content authority group permissions. Without these permissions, you will see a Submit command (instead of a Publish command) in the Document System toolbar, which submits a publishing request to all Content Approvers defined in the

system.

- To delete content records without requiring approval from another person, you must have Content Approver content authority group permissions, and you must have Delete Document System permissions for each content record. Without these permissions, you will see an Organize > Request Delete command in the Document System toolbar, but it will only submit a deletion request to all Content Approvers defined in the system. You must also have Content Approver content authority group permissions to use the Organize > Cut command, as this action effectively deletes the content record from its current content folder.
- You must have both Read and Edit Document System permissions on each content folder in which you create new content records. To edit existing content records, you must have both Read and Edit Document System permissions on each content record. To delete content folders, you must have Delete Document System permissions on each content folder. The Document System permissions from the parent content folder are copied into each newly created content record, but can be changed later.
- You must have Select Document System permissions on each content record to which you assign tags.
- With the help of those who perform website management, you must determine in which content folder to create the content record. Every content folder specifies important criteria that define how the system should manage content, and automatically applies these criteria to the content records created in that content folder. For example, the content folder specifies which iMIS content management websites the content records will be published to, and also specifies the content authority group that determines the default workflow for the content records, such as who is notified when a content record nears its expiration date.
- You should not create content records in the root content folder (the @ folder). It is unwise to specify system management criteria for content folders at the root level of the content folder hierarchy, as these criteria would be copied into all new content folders. By leaving the system default values intact in the root content folder, those who perform

website management can design a more flexible authoring and publishing environment.

- Modifications to your master pages might be required if iParts appear to overflow the boundaries of iPart zones in the rendered pages. This requires modifying the template's master page and accompanying CSS files to make the Home page and interior page layouts larger than their default size.

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

  Note: The Core Content content folder and all of its descendant content folders and content records are protected for use by iMIS. The default Document System permissions for these content folders and content records permit editing only by members of the SysAdmin role.

  Choosing Keywords and Description Text for a Content Record

  External web-based search engines such as Google generally index the text that you specify in the Description/Summary field, and they generally ignore the keywords that you specify in the Keywords/Metatags field. The iMIS content management search engine, by contrast, looks in both of these fields for matches to the keywords specified in the search.

  These two fields both generate <META> elements in the source code for a rendered content record, which are used by search engines to index pages and weight search results. The subject of <META> elements and search engines is extremely complex and has spawned its own industry of consultants, but the Search Engine Watch website includes tips for optimizing your <META> elements for search engines.

  Planning for tag inheritance in AdvancedSearch and ContentTaggedList iParts

  When choosing the tags to include in the configuration of an AdvancedSearch or ContentTaggedList iPart, you must account for the effect of implied relationships between parent and child tags in the tag hierarchy. A tag's position in the tag hierarchy creates an

underlying relationship that is not specifically displayed in the Related Tags section: parent tags are implicitly related to their children tags with a more broadly defines relationship, and children tags are implicitly related to their parent tag with a further defines relationship. This means that:

- The pre-filtered result set of a basic or advanced search includes all published content records that are tagged with any descendant of the tag that is matched by the search keywords.
- The pre-filtered result set of an advanced search includes all published content records that are tagged with any descendant of a tag that is specified in the configuration of the AdvancedSearch iPart if the user selects that tag at runtime on the rendered page that contains the advanced search form.
- The pre-filtered result set of a rendered ContentTaggedList iPart also includes published content records that are tagged with any descendent of a tag that is specified in the configuration of the ContentTaggedList.
- The content of the Items by Tag Report (in Continuum > Reports) does not list published content records that are tagged with any descendant of each tag in the report.

More

- Developer articles on iMISCommunity
- Microsoft Developer Network
- Telerik Documentation
- Search Engine Watch

Tracking authoring work

Use the Content Designer Task List to keep track of the unpublished content records that you have been working on, and also to review content change requests that are available to be worked on.

Go to RiSE > Content Designer > View task list:

- The Content you are working on section lists the content records that are still in a Working status and for which you were the last person to make any changes to the content record's definition.
- The Content awaiting your approval section lists the content publishing requests for all people that have Content Approver CAG permissions in at least one CAG to which they belong.
- The Content deletion requests section lists the content deletion requests for all people that have Content Approver CAG permissions in at least one CAG to which they belong.
- If you are the assigned content owner for a content record that is defined to have an expiration date, expiration notices for that content record are listed in the Content that has expired or will soon expire section when that date approaches, when the date actually occurs, and at defined intervals after the date has passed.
- The Content change requests assigned to you section lists the content records for which a change request was submitted by someone using the Surf-to-Edit feature of iMIS content management, and for which you are the assigned content owner.
- The Unassigned content change requests section lists the content records for which a change request was submitted by someone using the Surf-to-Edit feature of iMIS content management, but for which there is no assigned content owner.

  You can perform the following actions in the Content Designer Task List:

- View the contents of a change request email message. Select the envelope icon next to the change request.

  Note: A closed envelope icon indicates that no one has looked at the contents of the change request email message. An open envelope icon indicates that somebody has looked at the contents of the change request email at least once, but this does not mean that anyone has worked on the request.

- Edit a content record's definition to incorporate the requested changes. Select the content record's title in the list.

- Mark content change requests as completed. Select the checkboxes next to the content change requests that you want to approve and click Mark as Complete. The publishing requests are removed from the Content Designer Task List of all users, but the associated content records are not submitted for publishing. If you had not already published the content records while editing their definition, you must remember to publish them.
- Ask the submitters of content change requests for more information. Select the checkboxes next to the content change requests that you want to reject, and click Respond to Selected. A form is displayed that you can use to send an email message to the requesters with your questions or comments. No change is made to the content change requests, and they remain in the Content Designer Task List for all users.

  Troubleshooting

- You must have Content Editor content authority group (CAG) permissions in at least one content authority group to which you belong.
- You must have both Read and Edit Document System permissions on each content record.

  Tip: Where notification email addresses are defined

  All actions related to rejection notice emails and change request notice emails use the email address listed in the Profile tab of each user's contact record (iMIS Desktop > Customers > Manage Customers). The source address used in the Profile tab is specified in Customers > Set up module > Address and Notes, in the E-mail Flow from/to E-mail at Address field.

Approving content

Approving content records for publication

When a person who does not have Content Approver content authority group permissions defines a content record, they cannot directly publish the content record, because the Publish command is not available on the Document System toolbar. Instead, they see only a Submit for Approval command. This creates an entry in the Content awaiting your approval section of the Content Designer Task List of all users who have Content

Approver content authority group permissions in at least one content authority group to which they belong. The status of the content record changes to PublishRequested.

From your Content Designer Task List, you can perform the following actions:

- Review a content record's definition by clicking the content record's title in the list.
- Approve publishing requests:

1. Select the checkbox next to the request that you want to approve.
2. Click Approve Selected.

   The associated content records are submitted for publishing and the publishing requests are removed from the Content Designer Task List for all users. No publishing window is displayed.

- Reject publishing requests:

1. Select the checkbox next to the request that you want to reject.
2. Click Return Selected.

   A form appears that you can use to send an email message to the requester that explains the reason for rejecting the selected requests. After completing the form, the Status of the associated content records is set to Working, and the publishing requests are removed from the Content Designer Task List for all users.

   Approving content records for deletion

   When a person who does not have Content Approver content authority group permissions deletes a content record using the Document System Organize > Delete command, an entry is created in the Content deletion requests section of the Content Designer Task List for all users who have Content Approver content authority group permissions in at least one content authority group to which they belong. The status of the content record changes to DeleteRequested.

   From your Content Designer Task List, you can perform the following actions:

- Review a content record's definition by clicking its title in the list.
- Approve deletion requests:

1. Select the checkbox next to the requests that you want to approve.
2. Click Delete Selected.

   This sets the associated content records' status to Recycled, moves the content records to the Recycle Bin, and removes the corresponding .aspx files from all web servers. The deletion requests are also removed from the Content Designer Task List for all users.

- Reject deletion requests:

1. Select the checkboxes next to the ones that you want to reject.
2. Click Respond to Selected.

   A form appears that you can use to send an email message to the requester that explains the reason for rejecting the selected requests. After completing the form, the deletion requests are removed from the Content Designer Task List for all users.

- Reject deletion requests without responding to the requestor:

1. Select the checkbox next to the request that you want to reject.
2. Click Remove from List.

   The deletion requests are removed from the Content Designer Task List for all users.

   Troubleshooting

- You must have Content Approver content authority group permissions in at least one content authority group to which you belong. You must also have Read Document System permissions on each content record.
- To delete content records, you must have Delete Document System permissions on each content record.

  Tip: Where notification email addresses are defined

All actions related to rejection notice emails and change request notice emails use the email address listed in the Profile tab of each user's contact record (iMIS Desktop > Customers > Manage Customers). The source address used in the Profile tab is specified in Customers > Set up module > Address and Notes, in the E-mail Flow from/to E-mail at Address field.

Revising content in place

To revise an iMIS content management website page by using the Surf-to-Edit feature, log on to the website and click the Surf-to-Edit (STE) icon located by default near the Sign Out link on every web page of the website. This enables the Surf-to-Edit mode until you click the STE icon again to disable it.

When Surf-to-Edit mode is enabled, you will see a variety of different STE icons appear in different content areas of each web page. Exactly which STE icons you see will depend on which content authority group permissions and Document System permissions you have on the underlying content records in the rendered web page.

If you have both Content Editor content authority group permissions in at least one content authority group to which you belong and Edit Document System permissions on the specific content record displayed in a content area:

- If the content record is used in the Main Content Area of an interior page, you will see an STE icon for the entire content record and for each iPart in the content record.
- If the iPart is included in a System content record, you will see no STE icons for the iParts in the content record, but you will see one STE icon for the entire content record.

The graphic used for each STE icon might look different, depending on what type of iParts are used in the content record. For example, the STE icon for a Content Html iPart will look different from the STE icon for a ContentTaggedList iPart. Moreover, the STE icon for the entire content record will look different from both of those.

If you are a member of at least one content authority group (regardless of your specific content authority group permissions) and you do not have Edit Document System permissions on the specific content record displayed in a content area, then if the content record is used in the Main Content Area of an interior page, you will see no STE icons for

each iPart in the content record, but you will see one STE icon for the entire content record.

In all cases where you can see at least one STE icon, you can hover your mouse pointer over an STE icon to see the name of its associated iPart or content record.

The action that happens when you click on any of these STE icons depends on whether you have Edit Document System permissions to the underlying content records:

- If you have Edit permissions on the content record, you can edit the iPart or content record directly:

1. Click the STE icon to open an editor that is similar to what you see in Content Designer.
2. Click Save and Publish, or click Save As if you have Edit permissions on the system content record.
3. Use your browser's Refresh button to display the changes that you have made to the web page.

- If you do not have Edit permissions on the content record, you cannot edit the associated content record. Instead, the system displays a form that you can use to enter a content change request, which is distributed as follows:
- If the content record is workflow-enabled (a content authority group is assigned to its parent content folder), an email message is sent to the content record's content owner, and a change request entry also appears in the content owner's Content Designer Task List as being assigned specifically to the content owner.
- If the content record is not workflow-enabled or simply has no assigned content owner, a change request entry appears in the Unassigned content change requests section of the Content Designer Task List for every user who has Content Editor permissions in at least one content authority group to which they belong. Even though these users do not receive an email from the system, they can view the contents of your email message by clicking the envelope icon next to the change request in their Content Designer Task List.

Using Surf-to-Edit for a system content record

If you are modifying a system content record, your page will have a lone Surf-to-Edit icon on the bottom of the page. Click this icon to open a modified edit page. Note the presence of a Save As button.

There are two scenarios where you will be asked to use the Save As Surf-to-Edit approach: Shortcuts and Sitemaps.

Do the following to use Surf-to-Edit to modify a system content record through Shortcuts (for example, an event detail, product detail, or account page):

1. Click the Surf-to-Edit icon on your web page.
2. Make a change to your web page content.
3. Click Save As. You are prompted to save your content in the Shared Content folder.
4. Click OK.
5. Click Save & Publish.
6. Go to Manage > Web Content Management > Site Designer > Manage Shortcuts.
7. Find the shortcut that is currently pointing to the page you edited.
8. Note the values for For Website and Shortcut.
9. If the shortcut is for All Websites or your specific website, either edit the content record or create a site-specific content record using the following steps.
10. Click Add new.
11. In For Websites, select your website.
12. In Shortcut, enter the value noted in Step 8.
13. In URL or Content record, click select. Select the new content record.
14. Click Save.
15. Go back to the page you were editing. Note in the URL, the web page is accessing the Shared_Content record. You can edit as normal.

Do the following to use Surf-to-Edit to modify a system content record that is reached through your website's sitemap (for example, clicking on a navigation link):

1. Click the Surf-to-Edit icon on your web page.
2. Make a change to your web page content.
3. Click OK.
4. Click Save As. You are prompted to save your content in the Shared Content folder.
5. Click Save & Publish.
6. Go to Manage > Web Content Management > Site Designer > Manage Sitemaps.
7. Find the sitemap for your website.
8. Click the navigation for the page you've edited.
9. In Content or URL to Link to, click select.
10. Find your new content record.
11. Click Save.
12. Click Publish.
13. Click OK.
14. Go back to the page you were editing. Note in the URL, the web page is accessing the Shared_Content record. You can edit as normal.

Troubleshooting

To edit a web page's underlying content records or iParts by using the Surf-to-Edit feature, you must have Content Editor content authority group permissions in at least one content authority group to which you belong, and you must also have Read and Edit Document System permissions for that content record. Without these permissions, you are instead presented with a form that submits a change request to the Content Designer Task List for all Content Editors defined in the system.

Tip: Why use Surf-to-Edit?

Defining content records from within iMIS content management is a useful way to author new content, but it isn't always the most effective way to revise existing content. It can be more effective to actually browse or surf through your iMIS content management website and use the Surf-to-Edit feature to quickly open a page's underlying content record (or even a specific iPart within the content record) for editing. When you've saved your changes, you can continue browsing the website and making further content revisions as needed.

Tip: Where notification email addresses are defined

All actions related to rejection notice emails and change request notice emails use the email address listed in the Profile tab of each user's contact record (iMIS Desktop > Customers > Manage Customers). The source address used in the Profile tab is specified in Customers > Set up module > Address and Notes, in the E-mail Flow from/to E-mail at Address field.

Defining content folders

Do the following to define content folders.

Go to RiSE > Content Designer > Manage content:

1. Select the content folder in which you want to create the new content folder.
2. Select one of the following:

- Go to New > Website Content Folder to create a new content folder.
- Click Edit to modify an existing content folder.
- Go to Organize > Delete to delete a content folder.

3. Define the content folder’s Properties, Workflow Management, Current Tags, and Access Settings.

   In most cases, content folders are automatically published when you click Save. However, if you define an existing content folder that contains any content records with a status of Working, the content folder is not automatically published. You must sub-

sequently click Publish from the toolbar to create an active Published version. You can choose to publish the children content records at the same time, if desired.

Copying or moving content folders to another content folder

Go to RiSE > Content Designer > Manage content:

You can move content folders into different content folders by dragging and dropping them into a different folder. You can also move content folders by selecting them, then using the toolbar commands Organize > Cut and Organize > Paste.

When you move or copy a content folder into a new content folder, you must re-publish the moved content folder to make sure that the content records inside the folder that you moved are made visible on all iMIS content management websites associated with the new parent content folder. This also ensures the moved content folder is removed from all websites that were associated with the old parent content folder.

When you move or copy a content folder that is workflow-enabled, the content folder's assigned content authority group and content owner remains unchanged.

The tags inherited from ancestors in the content folder hierarchy are recalculated based on the content folder's new position in the hierarchy. Although the new inherited tags are visible immediately within the Content Designer tool, you must re-publish all descendants of the content folder to ensure that website searches for these tags will find the folder's descendant content records.

Reverting to an earlier version of a content folder

Every time you save or publish a content folder, the previous version is saved as an Archived version. Do the following to revert to an older archived version.

Go to RiSE > Content Designer > Manage content:

1. Select the content folder.
2. Click Versions.
3. Select an archived version and click Revert.

The version you selected is turned into a new Working version at the top of the list. When you close the window, this is the version you'll now see in the content folder hierarchy. As with any Working content folder, you can publish it when you are ready to make it an active Published version.

Restoring or purging deleted content folders

A content folder that has been deleted is moved to the Recycle Bin at the bottom of the content folder hierarchy.

Go to RiSE > Content Designer >Manage content:

To permanently purge specific content folders:

1. Select the content folders in the Recycle Bin. Press Ctrl as you select content folders to select more than one folder.
2. Go to Organize > Purge.

To permanently purge all items in the Recycle Bin:

1. Select the Recycle Bin.
2. Go to Organize > Empty the Recycle Bin.

To restore a deleted content folder:

1. Select the deleted content folder.
2. Click Versions.
3. In the version history that appears, select the desired Recycled version.
4. Click Revert and then OK. The content folder is moved to its original location in the content folder hierarchy and its status is changed to Working. You must re-publish the content folder to create an active Published version again.

Troubleshooting

- You must have one or both of the following content authority group permissions in at least one content authority group to which you belong:

- To create new content folders, you must have Folder Creator content authority group permissions.
- To modify the properties of a content folder, you must have Folder Editor content authority group permissions.
- You must have both Read and Edit Document System permissions on each content folder in which you create new content folders. To edit existing content folders, you must have both Read and Edit Document System permissions on each content folder. To delete existing content folders, you must have Delete Document System permissions on each content folder. The Document System permissions from the parent content folder are copied into each newly created content folder, but can later be modified.
- You must have Select Document System permissions on each content folder to which you assign tags.
- To be the content owner of a content folder, you must have Content Editor content authority group permissions in the content authority group that is assigned to the content folder.

  Note: The iMIS content folder and all of its descendant content folders and content records are protected for use by iMIS. The default Document System permissions for these content folders and content records permit editing only by members of the SysAdmin role.

  Concept: content folders

  A content folder contains a set of content records and other content folders in a hierarchical tree. Each content folder specifies important criteria that define how the system should publish and manage the workflow of content records within the content folder.

  Children content records and content folders inherit the tags from their parent content folder (and therefore also the tags from all ancestor content folders), but no other attributes are inherited. However, some attributes are initially copied from the parent folder at the time of creation.
- The specific Access Settings from the parent folder are copied to new content records and content folders at the time of creation, which you can subsequently change as

needed.

- The Authority Group value from the parent folder is copied to new content folders at the time of creation, which you can subsequently change as needed.
- The Owner of this content value from the parent folder is copied to new content folders at the time of creation, which you can subsequently change as needed.
- The Content is considered expired n days after last published value is copied to new content records and content folders at the time of creation, which you can subsequently change as needed.

  Note: For content folders that have a content authority group (CAG) assigned to them, the Owner of this content value is not copied to new content records that are created inside of it. Instead, content records automatically have this value set to specify the first person who created the content record, which you can subsequently change as needed.

  Caution! A content record does not have a content owner automatically assigned if it was created by a person who is a member of the SysAdmin role, but who does not have Content Editor content authority group permissions in at least one content authority group.

  #### Concept: content layouts and iPart zones

  A content layout is a predefined set of iPart zones within a content record. Each iPart zone can contain one or more iParts, and you can drag and drop iParts among the zones to rearrange the position in which content appears in a rendered content record.

  #### Concept: content owners

  A content owner is related to the content authority group (CAG) that is assigned to a content folder and its children content records. Content owners are specified in the Workflow Management section of the content folder or content record definition.

  Only members of the content authority group assigned to a content folder who also have Content Editor permissions within that content authority group are available to be manually assigned as the content owner for the content folder or for content records within that content folder.

When you create a new content folder, it copies the currently designated content owner for the parent content folder. However, when you create a new content record, a different process is followed:

- If the person who created the content record is a person with Content Editor content authority group permissions in at least one content authority group, they are automatically assigned as the content owner for the content record. You can subsequently change this value to any person from the parent folder's content authority group who has Content Editor content authority group permissions.
- If the person who created the content folder does not have Content Editor content authority group permissions in any content authority group, for example, a person who is a member of the SysAdmin role, then no content owner is assigned.

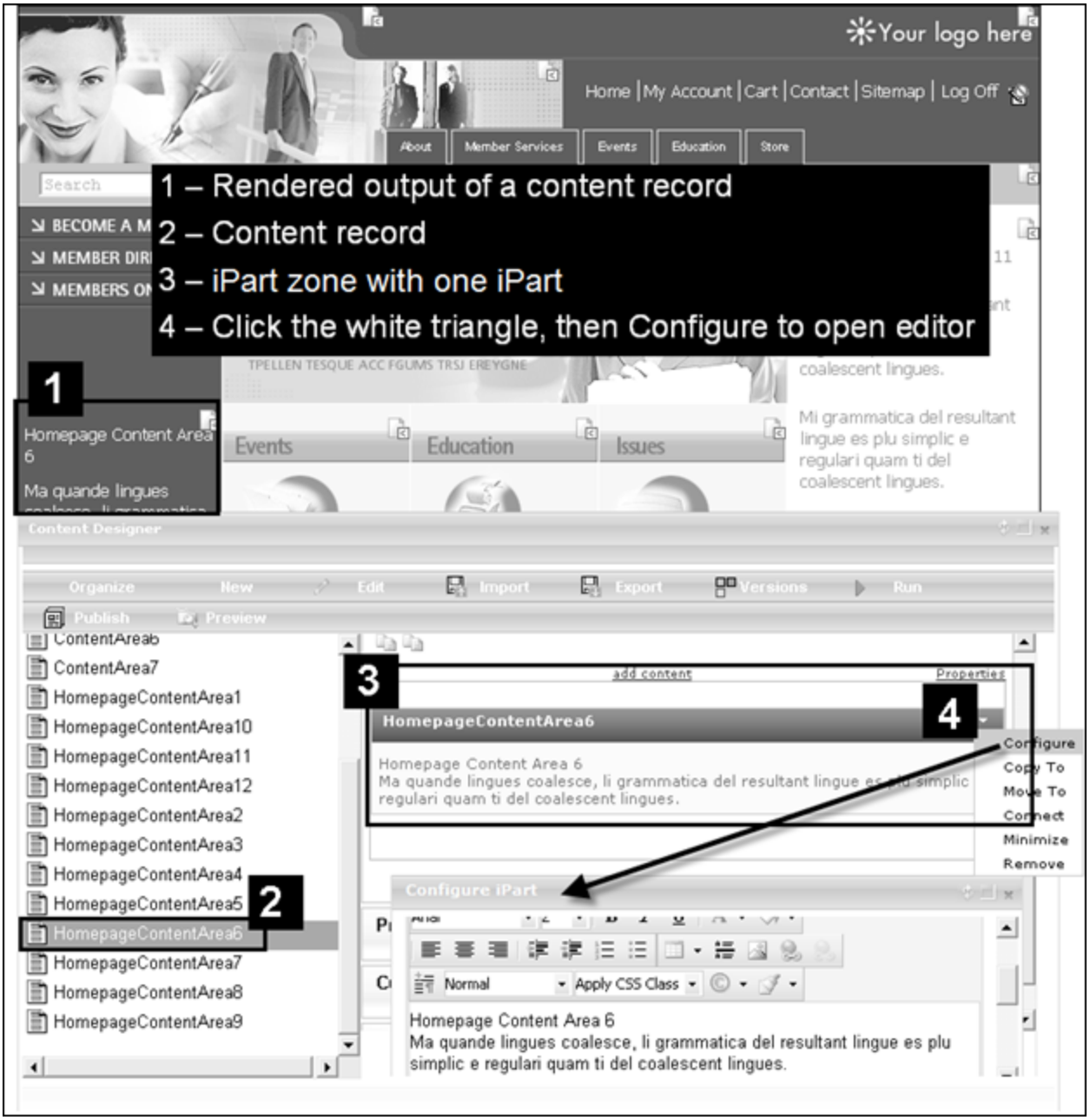
The Owner of this content field serves a different function for content records and content folders:

- For content records, the content owner:
- Receives email notification of pending expiration for the content record.
- Is assigned content change requests for the content record in the Content change requests assigned to you section of their iMIS content management Task List.
- For content folders, the content owner:
- Specifies which member of the assigned content authority group should replace the designated content owner of any child content records if the current owner assigned to a content record becomes ineligible for any reason.

Concept: content records, iParts, and content types

A content record is an iMIS definition object, stored in the Document System, which specifies all the information needed to render a web page from an iMIS content management website. Instead of hand-coding the contents of a web page for your website, you define some basic properties and tags for the content record, choose a content layout, add various iParts to the iPart zones in the layout, and then define the properties for each iPart.

After the content record has been published to an .aspx file on the website, it is available for viewing by web browsers as a complete web page.



An iPart is essentially a web widget in the ASP.NET environment. As with any web widget, you choose from different types of iParts to insert in in the various iPart zones in the content layout, then you configure each iPart to populate that instance of it with the desired content. You can easily rearrange the rendered page contents by dragging an

iPart to a different location within the iPart zones. A standard set of system-defined iParts are available in iMIS, but staff or consultants who are experienced in ASP.NET development can also easily add new iParts for use when authoring content.

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

Configuration options: content folders

These fields control the properties of content folders that are defined in the system.

Go to RiSE > Content Designer > Manage content:

Do one of the following:

- Select New > Website Content Folder.
- Select an existing content folder, and then click Edit.

Note: The Core content folder and all of its descendant content folders and content records are protected for use by iMIS. The default Document System permissions for these content folders and content records permit editing only by members of the SysAdmin role.

Status

Specifies whether this definition object is in a Working, PublishPending, Submitted, Published, Inactive, or Active state. Click the expand icon to view further details, including who created the record, who modified it last, and dates of these changes.

- Content records in a Working state have been saved within the iMIS database, but the latest changes have not been made active on the associated iMIS content management websites by the associated publishing servers and their corresponding iMIS publishing service (AsiPublishing15). The Publish command on the toolbar queues the content record to the associated publishing servers, during which the content record is in a PublishPending state and can be viewed in the Pending Requests detail for the associated publishing servers. After each publishing server has successfully processed the publishing request, the latest changes become visible on the associated websites and become active within iMIS, both of which are denoted by the Published state.

  If an iMIS user does not have content authority group (CAG) Content Approver permissions, they will see a Submit command instead of a Publish command. The Submit command queues a publishing request to the Content Designer Task List of all content authority group members who have Content Approver permissions (or, if workflow is enabled for the parent content folder, only those members of the content folder's assigned content authority group who have Content Approver permissions). Only a person with Content Approver permissions in at least one content authority group can actually publish content records.

- For all other definition objects, the publishing process is less complex and does not involve content authority group permissions, publishing servers, or the iMIS publishing service. When the object is in a Working state, the latest changes have been saved within the iMIS database, but they have not yet been made active within iMIS. The Publish command makes the latest changes active within iMIS.

- Websites in an Inactive state are offline so that browsers cannot view the website content, and instead see a 503 error (Service Unavailable) from IIS. Selecting the Is this website active? checkbox in the Status section of the website's definition puts the website in an Active state, enabling browsers to view the website content. Clearing the checkbox puts the website in an Inactive state.

  Folder Name

Specifies a version of the folder Title that meets the requirements for an IIS path segment to the rendered .aspx files for each content record in the folder. Every content folder created in iMIS content management has a corresponding IIS folder.

Default Website (for search)

Specifies the website for which searches will always include the content records within this content folder. This value is not inherited by any children content folders, although when you create a new content folder this field will copy the current value from its parent content folder as a default value.

Troubleshooting: If iMIS returns no search results, be sure to designate some content folders to list the specific website in either of these fields.

Include content in Searches for these additional Websites

Specifies additional websites, other than the one specified in Default Website (for search), for which searches will always include the content records within this content folder. These values are not inherited by any children content folders, although when you create a new content folder this field will copy the current values from its parent content folder as default values.

Caution! If you clear the Always display content in default website checkbox, be careful to specify only additional websites whose sitemaps include navigation items that link to all of the content records in this content folder.

Troubleshooting: If iMIS returns no search results, be sure to designate some content folders to list the specific website in either of these fields.

Always display content in default website

Displays the rendered version of a content record in this content folder in the context of the website specified in Default Website (for search) regardless of which website the search was performed on. When cleared, displays the rendered content record in the context of the website in which the search was made.

Publish on Servers

Specifies the publishing servers that should manage the publishing of all content records within this content folder.

- In the simplest case where you have only one publishing server defined in your iMIS content management environment, you should set this value to All for the root content folder (@) and set this value to Inherit on all folders beneath the root.
- In more complex environments with multiple publishing servers, you should generally use the Custom option to select one or more specific publishing servers for a given content folder and then set this value to Inherit on all folders beneath the one for which you chose a custom selection of publishing servers.

Workflow Management

Specifies whether content workflow is enabled for this content folder, and by default, all of its children content records too:

- If an Authority Group is assigned to this folder, then content workflow is enabled, and only the members of that content authority group (CAG) receive workflow notifications in their Content Designer Task List when changes occur to content records in the content folder.
- If no Authority Group is assigned, then any member of any content authority group in the system receives workflow notifications in their task list when changes occur to content records in the content folder.

The following fields appear only when a content authority group is assigned to a content folder:

- Owner of this content – Specifies which member of the assigned content authority group should replace the designated content owner of any child content records or content folders if the current owner assigned to a content record becomes ineligible for any reason. The drop-down list includes only those members of the assigned content authority group who have Content Editor permissions.
- Content is considered expired n days after last published – Specifies the default expiration interval for all content records in this folder. Expired content records are no longer rendered on iMIS content management websites, but the content record remains in the

system with no change in status until it is manually deleted by selecting Organize > Delete on the Document System toolbar, or by using the Delete Selected button on a content authority group member's Content Designer Task List.

Note: This default expiration behavior can be selectively overridden by the Automatically delete expired content? field in the definition of each content record.

Manually republishing the content record makes it appear again on the iMIS content management websites and resets the expiration interval.

The expiration interval can be effectively overridden for a specific content record in this folder by specifying a value smaller than the expiration interval for the Automatic Publishing Frequency field in the content record definition. This ensures that the expiration interval is never reached for that content record.

- Update this value for content in this folder and all subfolders – Automatically applies the setting for Content is considered expired n days after last published to the following when you save your changes to this content folder definition:
- all descendent content records
- descendant content folders with Workflow set up

Current Tags

Specifies the tags that are currently associated with this content folder. Clicking the Modify link displays a tag selection tree. Tags applied to a content folder are inherited by all descendant content records and content folders, not just the immediate children of this content folder. The Tags inherited from parent hierarchy area lists all tags that are being inherited from a content folder higher in the content folder hierarchy.

Only the inherited tags and the additional specific tags that you select here are used by the iMIS content management search engine. If you want search results to also find the descendant content records by descendant tags in the tag hierarchy, you must select the parent tag and also the specific descendant tags.

Although the iMIS content management search engine recognizes tag inheritance and finds descendant content records based on inherited tags, the Items by Tag report does not recognize tag inheritance and won't list the descendant content records and content folders for a tag that they inherit.

To choose useful tags for the dynamic handling of descendant content records, it helps to understand how tag-related functionality handles tag inheritance:

- The pre-filtered result set of a basic or advanced search includes all published content records that are tagged with any descendant of the tag that is matched by the search keywords.
- The pre-filtered result set of an advanced search includes all published content records that are tagged with any descendant of a tag that is specified in the configuration of the AdvancedSearch iPart if the user selects that tag at runtime on the rendered page that contains the advanced search form.
- The pre-filtered result set of a rendered ContentTaggedList iPart also includes published content records that are tagged with any descendent of a tag that is specified in the configuration of the ContentTaggedList.
- The content of the Items by Tag report (in Continuum > Content Reports) does not list published content records that are tagged with any descendant of each tag in the report.

  Note: Tags are always overwritten on import. For example, if you import a content folder from a staging server to a production server, the assigned tags on the production server are overwritten by whatever tags were assigned on the staging server.

  Access Settings

  Specifies the Document System permissions granted for this definition object to iMIS security roles, security groups, specific iMIS users, iMIS member types, or to all Full and Casual users based on their assigned authorization levels.

- Apply changes to all descendants – Changes to this section, when saved, flow automatically to all descendant definition objects. When cleared, changes to this section apply only to the current definition object. This checkbox usually appears only on

Document System folder objects.

- Use a preconfigured security set – Specifies a preconfigured security configuration to use for this definition object, which can be much simpler than using the Make this available to option to specify the permissions for definition objects. The specific permissions in the preconfigured security configuration are displayed (read-only) in the Make this available to area.

  If you select a preconfigured security configuration and then switch to the Make this available to option, the permissions granted by the preconfigured security configuration are copied. This enables you to use a preconfigured security configuration as a starting point for defining custom permissions.

- Make this available to – Lists the roles, groups, users, member types, or authorization levels that have been enabled to define or view rendered output from this object. This option enables you to specify custom permissions for the definition object if none of the preconfigured security configurations meets your needs. The SysAdmin, Content Administrator, and Everyone roles are default system-defined security roles that are assigned to every definition object used by iMIS content management. The SysAdmin role is assigned in the definition of an iMIS user record, but the Content Administrator role is automatically assigned to every iMIS user who is a member of an iMIS content management content authority group (CAG) that is designated as a Master Admin content authority group.

  The permissions that can be assigned to each entry in the list are:

- Full Control – Enables all of the following permissions.
- Read – Enables users to see this object both in iMIS content management definition windows and as rendered output in iMIS content management websites, but they cannot change the object's definition.
- Add – Enables users to create new objects, or to paste or import an object into the Document System.
- Edit – Enables users to edit this object's definition, but not to delete the object.

- Delete – Enables users to delete this object.
- Select – (if displayed) Enables users to assign a tag to content folders and content records.

Configuration options: content records

These fields control the properties of content records that are defined in the system.

Go to RiSE > Content Designer > Manage content:

Do one of the following:

- Select New > Website Content.
- Select an existing content record, and then click Edit.

You must be logged on to the website and have Content Editor permissions in at least one content authority group (CAG) in order to use the Surf-to-Edit (STE) feature to modify a content record.

The Save options available for a content record are:

- Save: A Working version of the content record is saved. Publish the content record to make it the active version.
- Save As: This option is available on System content records. You can rename and save the content record to a new (non-System) folder. The Save and Save & Publish options are hidden.
- Save & Publish: This option is available if you have the Content Approver content authority group permission. When you Save & Publish, your changes are immediately visible on any iMIS content management website that uses the content record.
- Save and Submit for Approval: This option is available if you do not have the Content Approver content authority group permission. When you Save and Submit for Approval, your changes are saved and a content publishing request is submitted to the content folder's Content Approver.

Note: Content records might also contain additional iMIS content management user-defined fields (UDFs). UDFs appear in the Properties section, beneath the Mark as important until field.

Note: The iMIS content folder and all of its descendant content folders and content records are protected for use by iMIS. The default Document System permissions for these content folders and content records permit editing only by members of the SysAdmin role.

Note: System content records cannot be edited or deleted. If you want to update a System content record, create a copy of it, and then edit the copy. Be sure to also update any navigation items or shortcuts that point to that content record.

Note: You cannot use Export and Import to make copies of objects within the same iMIS database. To make copies, use Organize > Copy and Organize > Paste.

Status

Specifies whether this definition object is in a Working, PublishPending, Submitted, Published, Inactive, or Active state. Click the expand icon to view further details, including who created the record, who modified it last, and dates of these changes.

- Content records in a Working state have been saved within the iMIS database, but the latest changes have not been made active on the associated iMIS content management websites by the associated publishing servers and their corresponding iMIS publishing service (AsiPublishing15). The Publish command on the toolbar queues the content record to the associated publishing servers, during which the content record is in a PublishPending state and can be viewed in the Pending Requests detail for the associated publishing servers. After each publishing server has successfully processed the publishing request, the latest changes become visible on the associated websites and become active within iMIS, both of which are denoted by the Published state.

  If an iMIS user does not have content authority group (CAG) Content Approver permissions, they will see a Submit command instead of a Publish command. The Submit command queues a publishing request to the Content Designer Task List of all content authority group members who have Content Approver permissions (or, if workflow is

enabled for the parent content folder, only those members of the content folder's assigned content authority group who have Content Approver permissions). Only a person with Content Approver permissions in at least one content authority group can actually publish content records.

- For all other definition objects, the publishing process is less complex and does not involve content authority group permissions, publishing servers, or the iMIS publishing service. When the object is in a Working state, the latest changes have been saved within the iMIS database, but they have not yet been made active within iMIS. The Publish command makes the latest changes active within iMIS.
- Websites in an Inactive state are offline so that browsers cannot view the website content, and instead see a 503 error (Service Unavailable) from IIS. Selecting the Is this website active? checkbox in the Status section of the website's definition puts the website in an Active state, enabling browsers to view the website content. Clearing the checkbox puts the website in an Inactive state.

  Title

  Specifies what is rendered in the title of a browser window or browser tab when the rendered output of a content record is displayed. The words used in this field also factor into the relevancy weighting of search results. Go to RiSE > Set up content management > Search configuration.

  Publish File Name

  Specifies the name of the .aspx file to which this content record is published.

  Generate full URL

  Enables you to paste a full URL for this content record into the body of an iPart (for example: http://10.40.10.105/iMIS/ContactManagement/ContactLayouts/Personal.aspx).

  Generate Freelink

  Enables you to paste a wiki-style internal link for this content record into the body of an iPart (for example: [[About_Us]]). The freelink text is the defined Publish File Name of this

content record. When the web page is rendered in a browser, the freelink is replaced by a standard URL link:

About_Us

(optional) You can add replacement text to the freelink using the following format: [[About_Us | Learn about our organization]], which would be rendered as:

Learn about our organization

If you have multiple content records with exactly the same Publish File Name (which is possible if the content records are in different content folders), you can assign a unique content code to each content record. The system will copy the content code instead of the name. Alternatively, you can manually add a content folder path to identify a specific content record (for example, [[@/Legal_Services/About_Us]]).

Caution! If you add a content folder path to a freelink, the freelink will not resolve correctly in rendered webpages if the target content record is moved to a different content folder. For this reason, it is generally best practice to ensure that all your content records are uniquely named and thereby avoid the need to add a content folder path to a freelink.

Content Layout

A content layout is a predefined set of iPart zones within a content record. Each iPart zone can contain one or more iParts, and you can drag and drop iParts among the zones to rearrange the position in which content appears in a rendered content record.

add content

Displays a Content

Content Gallery browser that lets you select from available ASP.NET iParts to add to this iPart zone of the content record by selecting the desired iParts and clicking OK. After the iParts have been added to the zone, you can drag each iPart into the order you want them to appear in that zone of the rendered web page.

The Content folder contains the system-defined iParts that ship with iMIS, and are meant for general-purpose content authoring. For example, the Content Html iPart enables you to author a block of HTML text, and the Content Tagged List iPart enables you to specify the automatic inclusion of other content records or even entire content folders that have a certain tag associated with them.

The Or, enter a path to a web user control field allows implementers to specify a path to a user control that is not defined within the Content Gallery. See Defining custom iParts as content types.

To see the Communities Content Gallery, you need a COMMUNITIES license.

To work with iParts that have been added to a content record, click from the following commands on the iPart's title bar:

- Configure – Displays a window that enables you to define the properties of the iPart. For example, performing this action for a Content Html iPart displays an HTML editor. When configuring an iPart, click the link for Configuration Help.
- Copy To – Copies the iPart to another content record.
- Move To – Moves the iPart to another content record.
- Connect – Displays a connection editor that enables staff or consultants to define iPart connections. Connections allow one iPart to interact with another iPart on the same content record. Not all iParts support connections, so when configuring an iPart, open the Configuration Help to determine the iPart's connection options.

  When creating a new connection, the available connection types are listed, and a drop-down list enables you to select from the other iParts on the same content record. For example, to configure iPart A to act upon iPart B, create a connection, and set iPart A to be the Object Consumer. Set iPart B to be the Object Provider. Each iPart can only have one Consumer and one Provider per connection type. So an iPart can only act as an Object Provider for one other iPart, for example, not as an Object Provider for several other iParts.

The connection editor lists all current connection points for the iPart and allows you to define new connections. Each iPart (consumer and provider) displays the connection once it is defined. For example, if you select iPart A and connect it to iPart B, and then look at the connections for B, you will see the connection there as well. Connections can also be disconnected from here.

Currently, connections can be of four types: Object, Atom Object, Uniform Key, or String Key. The type of connection to use depends on the implementation by the iPart's author. Please refer to the specific iPart's Configuration Help for details.

- Minimize – Collapses the iPart's preview box, instead displaying only the iPart's title bar.
- Restore – Expands a collapsed iPart to display its preview box.
- Remove – Removes the iPart from the content record.

Note: The content types defined in the system determine the behavior of ASP.NET iParts controls within iMIS. Each iParts control must have an associated content type, which tells iMIS how to create the corresponding iPart within the system, how to edit it, how to display it, how to publish it, and so on. The system-defined iParts in the Content Gallery all have a corresponding content type. A special ContentWebUserControl content type is used as the default content type for all custom iParts that you add to a content record. You can optionally define entirely new content types to enable more sophisticated system handling of a custom iPart that has been added to a content record.

Properties (the link at upper right of each iPart zone)

Specifies the displayed title and CSS classes associated with this iPart zone of the content record.

- Title – Specifies a title for the zone, which is displayed in the rendered output at the top of the zone, preceding the content items in that zone.
- Title CSS Class – Specifies a CSS class attribute for the element that comprises the rendered zone title. This class must be available in the stylesheets associated with the theme used for the associated website.

- Zone CSS Class – Specifies a CSS class attribute for the <table> element that comprises the rendered zone. This class must be available in the stylesheets associated with the theme used for the associated website.

  Display within the template

  Renders the content record within the content area of the website's master page. When cleared, renders the content record as a standalone web page that contains none of the navigation areas or graphic look-and-feel of the website's master page.

  Content is restricted to members

  Makes the rendered version of this content record non-readable unless:

- The person attempting to view the rendered content on the website is logged on to the website with a valid iMIS logon.
- The contact record that corresponds with the iMIS logon is a member type (customer type) that is defined as Is a member in Customers > Set up module > Customer types.

  When cleared, the rendered version of this content record is readable by any user regardless of their member type.

  Open in new browser window

  Makes the rendered version of this content record open in a new browser window.

  Content requires user to log in

  Makes the rendered version of this content record non-readable unless the person attempting to view the rendered content on the website is logged on to the website with a valid iMIS logon. When cleared, the rendered version of this content record is readable by anonymous website visitors.

  Content is secure (https://)

  Makes the rendered version of this content record be displayed through a secured connection (SSL) to the web server regardless of which navigation item sends the user to this content record, but only if both of the following two conditions are also met:

1. The websites whose sitemap navigation items point to this content record have valid https:// URLs listed in the Secure URL(s) pointing to the IIS website root field in their definition.

   Important: Restart IIS whenever you change the Secure URL(s) pointing to the IIS website root setting. Note that localhost is not a valid Secure URL.

2. You have installed valid site certificates in IIS for each web server that hosts these websites.

   Because a content record cannot know in which websites it will ultimately be used, there is no validation possible for this checkbox. If this content record ends up being served by a website that does not meet the above criteria, the content record will be displayed through a non-secured connection (http://).

   Content allows user impersonation

   This option is currently unused. Instead, use On Behalf Of.

   Note: In iPart-based websites, enabling user impersonation is no longer required. Instead, you can use On Behalf Of, so that staff can complete transactions on behalf of your customers.

   If you are not using On Behalf Of, enable this option to make the rendered version of this content record available to logged-on iMIS users who are currently changing information on behalf of another user.

   Go to Contacts > Contact management and click the Change link at the upper right of every window in this area of the product.) When cleared, the rendered version of this content record is non-readable by iMIS users who are currently changing information on behalf of another user.

   For example, assume that content record X is defined such that you do not have the required Document System permissions to view its rendered web page, but user "John Doe" does have the permissions to view the rendered page. If you log on as yourself and use the above technique to impersonate user "John Doe", you will be able to navigate to the rendered page and view its contents if this checkbox is selected.

Description/Summary

Specifies a description of the content record that is oriented to the people who perform web content authoring, and which is also included in the <META> element's description attribute in the rendered page's source code for this content record. This text is not displayed in the rendered web page itself or in search results summaries, but the words used in the <META> element enable searches performed through the iMIS content management search engine,and also many external web-based search engines such as Google, to locate this content record even if the words are not actually used anywhere in the visible rendered content.

The words used in this field also factor into the relevancy weighting of search results. Go to Set up content management > Search configuration, and review the SE.SearchDescriptionHint field.

Keywords/Metatags

Specifies the keywords that should be included in the <META> element's keywords attribute in the rendered page's source code for this content record. These keywords enable searches performed through the iMIS content management search engine to locate this content record even though these keywords are not actually used anywhere in the visible rendered content.

Note: External web-based search engines such as Google do not typically index the contents of this <META> element.

The keywords used in this field also factor into the relevancy weighting of search results. Go to Set up content management > Search configuration, and review the the SE.SearchKeywordHint field.

Date of Publication

Specifies the publication date for this content record, for the purpose of filtering search results or for filtering and sorting of the output from ContentTaggedList iParts. For example, you could override the default (actual) date that this content record was pub-

lished if you wanted searches based on a different date to find the rendered version of this content record.

Publish on Future Date

Specifies a delayed and automated publication date for this content record, enabling you to embargo the content by completing the content record now but ensuring that its rendered version does not become available on any websites until later.

Automatic Publishing Frequency

Specifies how frequently to automatically republish this content record. This field can be used to prevent a content record from ever being automatically expired if a non-zero value has been specified in the Content is considered expired n days after last published field for the content folder that contains the content record. You do this by specifying a value here that is smaller than the value in the Content is considered expired… field.

Mark as important until

Specifies the date after which the New icon for an entry in the rendered version of a ContentTaggedList iPart will stop being displayed.

Note: This field affects only content records that contain a ContentTaggedList iPart, and only if the CM.UseImportantUntilDate configuration option is enabled. Go to Set up content management > Content designer configuration.

Content code

Specifies a unique identifier for this particular content record that can be used to ensure that a navigation item will always point to this content record even if the content record's location in the Document System hierarchy changes at some future date. Normally if this happens (by moving the content record to a different content folder), the Content or URL to Link to field in a navigation item must be manually changed to point to the new relative path of the content record within the Document System hierarchy.

However, if you specify this ContentCode value in the Content or URL to Link to field in a navigation item, then even if this content record is moved to another content folder or renamed, the navigation item will still point to this content record.

Cache duration

You have the option to cache webpages on your server to improve website performance. This option only caches pages for unauthenticated users. A version of the page is cached for each major browser version that accesses the page (for example Firefox 14, IE9, and so forth). Pages can be cached for five seconds (Short), five minutes (Medium), or one hour (Long).

When you enable this option, the first request for the content record generates and stores a cached version of the webpage on the server for the specified duration. Within that period of time, if another unauthenticated user visits the page using the same web browser type and version, then the page is loaded from the cache, instead of accessing the database again.

Consider what type of content the page displays when you choose the cache duration. For example, if the content record contains a Content Tagged List, and new data is tagged regularly, then you would likely only want to cache the page for a short or medium period of time. However, if the data is more static, like an article, then caching for a long period of time may make more sense.

The Cache duration is ignored if the content record contains any iParts that require dynamic data, because dynamic data cannot be accessed from the cache. This applies to the Payment Creator iPart, Contact Account Creator iPart, Cart Details Display iPart, and any Content HTML iParts that contain script tags (such as C# code or JavaScript).

Page caching can be disabled site-wide when the following value is set to false within the website's web.config file:

<add key="Content.EnablePageCaching" value="true"/>

Content Parameters

(displayed only in content records that contain a custom iPart)

Specifies the parameters for a custom iPart that has been added to this content record. The exact parameters cannot be described here because they are defined in the custom iPart and its associated content type. Contact the staff or consultants who created the custom iPart for information about what you should enter in this field.

This content is part of the site's Template design

Enables this content record to populate a named content area of a template design. When cleared, the rendered version of this content record can only be viewed if it is pointed to by a navigation item.

The available content areas that you can specify in the associated Show in content area field are the first part of the .aspx file names listed in the Content Areas folder of the iMIS content management website folders created in IIS. For example, if you want this content record to be the content displayed for the HomePageContentArea6.aspx page in a website created with the master page template, you would specify HomePageContentArea6 in this field.

Workflow Management

(displayed only when a content authority group is assigned to the parent content folder, which means that content workflow is enabled for this content record)

- Owner of this content – Specifies which person should receive email notification when this content record approaches its expiration date, and should be assigned a content change request in their Content Designer Task List when a Surf-to-Edit user requests a change to this content record. If the person who creates a content record has Content Editor content authority group permissions in at least one content authority group, that person is automatically assigned as the content owner. You can subsequently change this value. The drop-down list includes only those members of the assigned content authority group who have Content Editor permissions.
- Content is considered expired n days after last published – Specifies the expiration interval for this content record. When expired, the content record is no longer rendered on iMIS content management websites, but the content record remains in the system with no change in status until it is manually deleted by using the Organize > Delete command on

the Document System toolbar or by using the Delete Selected button on a content authority group member's Content Designer Task List. Manually republishing the content record makes it appear again on the iMIS content management websites and resets the expiration interval.

The expiration interval can be effectively overridden by specifying a value smaller than the expiration interval for the Automatic Publishing Frequency field. This ensures that the expiration interval is never reached for that content record.

- Content set to expire – Specifies an exact expiration date for this content record. You can specify a value for this field only if the value specified for the Content is considered expired n days after last published field is 0. Otherwise, this field is read-only.
- Automatically delete expired content? – Overrides the default expiration behavior described above by automatically deleting the content record when it has passed its expiration date. The content record is moved into the Recycle Bin at the bottom of the content folder hierarchy and its status is changed to Recycled.

  Current Tags

  Specifies the tags that are currently associated with this content record. The Tags inherited from parent hierarchy area lists all tags that are being inherited from a content folder higher in the content folder hierarchy. Clicking the Modify link opens a window that enables you to select the tags for this content record.

  Only the inherited tags and the specific tags that you select here are used by the iMIS content management search engine. If you want search results to also find this content record by descendant tags in the tag hierarchy, you must select the parent tag and also the specific descendant tags.

  Although the iMIS content management search engine recognizes tag inheritance and finds descendant content records based on inherited tags, the Items by Tag report does not recognize tag inheritance and won't list the descendant content records and content folders for a tag that they inherit.

To choose useful tags for the dynamic handling of a content record, it helps to understand how tag-related functionality handles tag inheritance.

- The pre-filtered result set of a basic or advanced search includes all published content records that are tagged with any descendant of the tag that is matched by the search keywords.
- The pre-filtered result set of an advanced search includes all published content records that are tagged with any descendant of a tag that is specified in the configuration of the AdvancedSearch iPart if the user selects that tag at runtime on the rendered page that contains the advanced search form.
- The pre-filtered result set of a rendered ContentTaggedList iPart also includes published content records that are tagged with any descendent of a tag that is specified in the configuration of the ContentTaggedList.
- The content of the Items by Tag report (in Content Management > Reports) does not list published content records that are tagged with any descendant of each tag in the report.

  Note: Tags are always overwritten on import. For example, if you import a content record from a staging server to a production server, the assigned tags on the production server are overwritten by whatever tags were assigned on the staging server.

  Access Settings

  Specifies the Document System permissions granted for this definition object to iMIS security roles, security groups, specific iMIS users, iMIS member types, or to all Full and Casual users based on their assigned authorization levels.

- Apply changes to all descendants – Changes to this section, when saved, flow automatically to all descendant definition objects. When cleared, changes to this section apply only to the current definition object. This checkbox usually appears only on Document System folder objects.
- Use a preconfigured security set – Specifies a preconfigured security configuration to use for this definition object, which can be much simpler than using the Make this available to option to specify the permissions for definition objects. The specific permissions in the

preconfigured security configuration are displayed (read-only) in the Make this available to area.

If you select a preconfigured security configuration and then switch to the Make this available to option, the permissions granted by the preconfigured security configuration are copied. This enables you to use a preconfigured security configuration as a starting point for defining custom permissions.

- Make this available to – Lists the roles, groups, users, member types, or authorization levels that have been enabled to define or view rendered output from this object. This option enables you to specify custom permissions for the definition object if none of the preconfigured security configurations meets your needs. The SysAdmin, Content Administrator, and Everyone roles are default system-defined security roles that are assigned to every definition object used by iMIS content management. The SysAdmin role is assigned in the definition of an iMIS user record, but the Content Administrator role is automatically assigned to every iMIS user who is a member of an iMIS content management content authority group (CAG) that is designated as a Master Admin content authority group.

  The permissions that can be assigned to each entry in the list are:

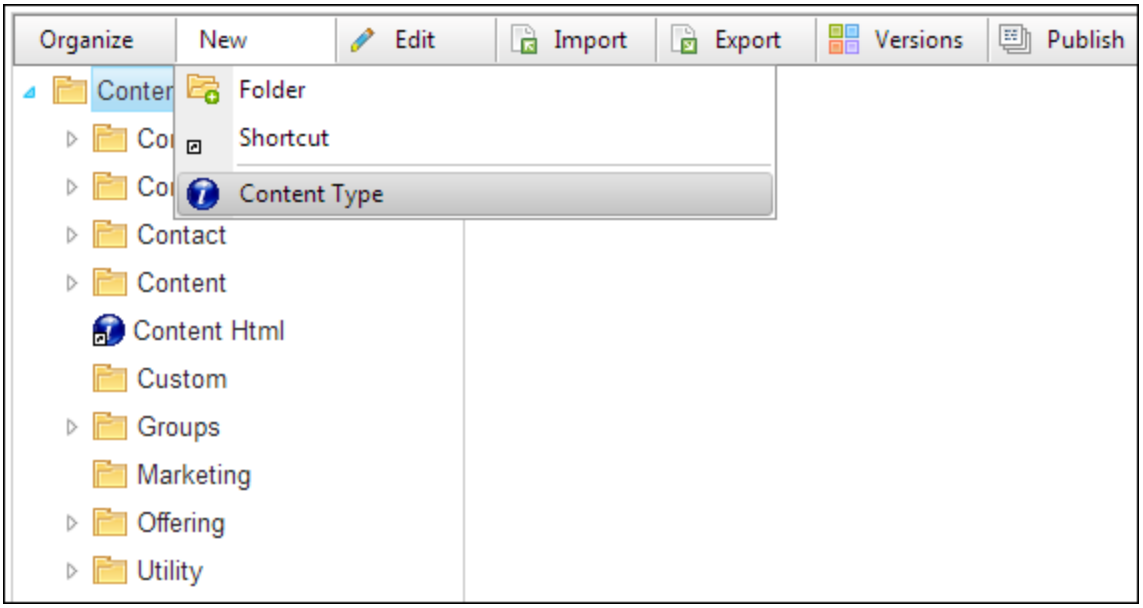
- Full Control – Enables all of the following permissions.
- Read – Enables users to see this object both in iMIS content management definition windows and as rendered output in iMIS content management websites, but they cannot change the object's definition.
- Add – Enables users to create new objects, or to paste or import an object into the Document System.
- Edit – Enables users to edit this object's definition, but not to delete the object.
- Delete – Enables users to delete this object.
- Select – (iMIS content management only) Enables users to assign a tag to content folders and content records.

Configuration options: content types

These fields control the properties of content types that are defined in the system.

Go to RiSE > Maintenance > Content Types:

- Select New > Content Type.
- Select an existing content type, then from the toolbar click Edit.



To place your control into the Content Gallery for easy sharing and reuse, create a content type.

Tips

- The class libraries and user controls that you specify must be manually copied to a file path that resolves to the same root-relative URL on all servers that host iMIS content management websites.
- The class libraries must be placed in the bin folder below the root of the physical path for the IIS application or IIS website that hosts your iMIS content management websites.
- The user controls can be placed in any folder below the root of the physical path.
- When specifying paths to controls, be sure to use forward slashes (/) for the segment delimiters.

Name of the Content Type, Description of the Content Type

Specifies the name and description of the associated iPart. If you are publishing this iPart in the Content Gallery, be sure this text is as you want it to appear to users in the Gallery when they select iParts for use in content records, and do not duplicate any iPart names already appearing in the Gallery.

URL to the control or page that is used to display items of this type at runtime

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to display instances of the iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

If you have not created a custom IContentType class (you entered Asi.Business.ContentManagement.ContentType.ContentTypeBase in the Name of the IContentType class within the assembly field), a declaration to this control is embedded in published pages that use the iPart, and the control will be dynamically loaded and inserted into the page when rendering the control (for preview or for search). If you've implemented a custom IContentType class, you can change this behavior to match your own requirements.

Configuration options: Advanced Properties (optional)

Name of the .NET assembly that contains the class that implements this content type

Specifies the name of the class library that contains the compiled serializable class.

Name of the serializable class within the assembly that implements this content type

Specifies the name of the class that implements the iPart in Content Designer (which must inherit the base class Asi.Business.ContentManagement.ContentItem). You must enter the fully qualified class name, including the namespace.

Name of the .NET assembly that contains the IContentType class used to publish this content type

Specifies the name of the class library that contains the compiled IContentType class.

- If you are using the base IContentType class provided with iMIS content management for this content type, enter Asi.Business.ContentManagement.
- If you are using a custom-developed IContentType class, enter the name of the class library that contains the compiled class.

  Name of the IContentType class within the assembly

  Specifies the name of the class that implements the IContentType interface that iMIS content management uses to render and publish the iPart.
- To use the default rendering and publishing behavior provided by the base IContentType class provided with iMIS content management, enter Asi.Business.ContentManagement.ContentType.ContentTypeBase.
- To perform custom actions when an iPart is published or rendered, you can instead create a custom IContentType class (which must inherit the base class (Asi.Business.ContentManagement.ContentType.ContentTypeBase). You must enter the fully qualified class name, including the namespace.

  URL to the control or page that is used to collect the properties of a new item of this type

  Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to collect properties when creating new instances of the iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

  In most cases, you should specify the same control here as for the URL to the control page that is used to edit the properties of an existing item of this type.

  Note: This control is currently unused in this version of iMIS content management. Instead the control specified in URL to the control page that is used to edit the properties of an existing item of this type is used for collecting the properties for newly created iParts and for existing iParts that are being edited.

URL to the control or page that is used to edit the properties of an existing item of this type

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to collect properties when editing the configuration of an existing iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

In most cases, you should specify the same control here as for the URL to the control page that is used to collect the properties of a new item of this type.

URL to the control or page that is used to collect parameters for content items of this type

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to collect parameter overrides for the iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

You use this type of control to override the configuration of an iPart on a per-navigation-item basis. The parameter overrides can be specified in two different ways in a navigation item, depending on what type of input this control is written to accept:

- The URL parameters field can pass parameters in an ampersand-delimited string that is appended to the URL that fetches the associated content record.
- The Content parameters field can actually display selected properties from the control that defines the configuration page for the associated iPart. In other words, a subset of the properties defined in the control specified in the URL to the control or page that is used to edit the properties of an existing item of this type field.

  Only one of the content types shipped with iMIS content management uses this field (ContentTaggedList), and the corresponding control is written to collect parameters from the Content parameters section of a navigation item.

URL to the icon graphic that represents items of this type

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to an image file that should be displayed on rendered web pages as the Surf-to-Edit (STE) icon for iParts associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/mySurfToEditIcon.gif.

The image file must be 16x16 pixels in size. If this field is left blank, a default STE icon is used (~/AsiCommon/icon_con_usercontrol.gif).

URL to the configuration help page

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the Configuration Help for the iPart associated with this content type. This Help page displays when you click the link when configuring an iPart. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/iparts/Common/QueryMenu/QueryMenuHelp.htm.

The visual look and feel of the Help page is based on the iMIS theme you have selected. To be consistent with the rest of iMIS, we recommend that you only use basic HTML and allow iMIS to style the page. However, if needed, you can tailor the page using internal CSS.

Configuration options: content gallery

These fields control the properties of the standard iMIS iParts that are defined in the system. By default, these fields are found in the following locations:

- In a content record, click add content, click a gallery folder, and select one of the listed iParts to the content record. For an existing iPart, click the down triangle at the far right of the iPart's title bar, and then choose Configure.
- When using the Surf-to-Edit (STE), click the STE icon that relates to various iParts in the content records used in the content areas of the page. You must be logged on to the website and have Content Editor permissions in at least one content authority group (CAG).
- To see the Communities Content Gallery, you need a COMMUNITIES license.

When you configure an iPart directly from STE, the available Save options are:

- Save: A Working version of the content record is saved. Publish the content record to make it the active version.
- Save and Publish: This option is available if you have the Content Approver content authority group permission. When you Save and Publish, your changes are immediately visible on any iMIS content management website that uses the content record.
- Save and Submit for Approval: This option is available if you do not have the Content Approver content authority group permission. When you Save and Submit for Approval, your changes are saved and a content publishing request is submitted to the content folder's Content Approver.

  When you configure an iPart from a content record, you only have the option to Save or Cancel. You can publish your changes from the content record or the Document System toolbar.

  Tips

  To work with iParts that have been added to a content record, click the drop-down arrow at the right of an iPart's title bar and choose from the following commands:

- Configure – Displays a window that enables you to define the properties of the iPart. For example, performing this action for a Cont
- Content Html iPart displays an HTML editor. In configuration, you can access Help ( ) for most iParts. This detailed configuration documentation also appears in the iPart Reference on the Helpsite.
- Copy To – Copies the iPart to another content record.
- Move To – Moves the iPart to another content record.
- Connect – Displays a connection editor that enables staff or consultants to define iPart connections. Connections allow one iPart to interact with another iPart on the same content record. Not all iParts support connections, so when configuring an iPart, open the Configuration Help to determine the iPart's connection options.

When creating a new connection, the available connection types are listed, and a drop-down list enables you to select from the other iParts on the same content record. For example, to configure iPart A to act upon iPart B, create a connection, and set iPart A to be the Object Consumer. Set iPart B to be the Object Provider. Each iPart can only have one Consumer and one Provider per connection type. So an iPart can only act as an Object Provider for one other iPart, for example, not as an Object Provider for several other iParts.

The connection editor lists all current connection points for the iPart and allows you to define new connections. Each iPart (consumer and provider) displays the connection once it is defined. For example, if you select iPart A and connect it to iPart B, and then look at the connections for B, you will see the connection there as well. Connections can also be disconnected from here.

Currently, connections can be of four types: Object, Atom Object, Uniform Key, or String. The type of connection to use depends on the implementation by the iPart's author. Please refer to the specific iPart's Configuration Help for details.

- Minimize – Collapses the iPart's preview box, instead displaying only the iPart's title bar.
- Restore – Expands a collapsed iPart to display its preview box.
- Remove – Removes the iPart from the content record.

Note: The content types defined in the system determine the behavior of ASP.NET iParts controls within iMIS. Each iParts control must have an associated content type, which tells iMIS how to create the corresponding iPart within the system, how to edit it, how to display it, how to publish it, and so on. The system-defined iParts in the Content Gallery all have a corresponding content type. A special ContentWebUserControl content type is used as the default content type for all custom iParts that you add to a content record. You can optionally define entirely new content types to enable more sophisticated system handling of a custom iPart that has been added to a content record.

Other tips:

- Modifications to your master pages may be required if iParts appear to overflow the boundaries of iPart zones in the rendered pages. In general, this requires modifying the template's master page and accompanying CSS files to make the Home page and interior page layouts larger than their default size.
- Custom ASP.NET iParts are not described in this section because they are not part of the standard set of iParts shipped with iMIS.
- Implementers can add an ad hoc ASP.NET web user control to a content record by entering the relative path to the iPart in the Or, enter a path to a web user control field.

  Or, enter a path to a web user control

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

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

  #### Configuration options: publishing options

  These fields determine how the system should process an iMIS content management definition object when you use the Publish command.

  Go to RiSE > Site Designer or Content Designer:

  Click Publish on the Document System toolbar for most iMIS content management definition objects.

  Tips

- When you choose to Save and Publish a content record or iPart, then no publishing options are displayed. Your changes to the content record or iPart are automatically published and immediately visible on all websites that use it.
- You can multi-select content records (by holding Shift or Ctrl while selecting them) to publish a group of content records all in one operation.

- If you publish a content folder, the publishing process automatically includes all descendants (content records and sub folders) of that content folder too, and the publishing option you select is applied to each descendant.
- When you make changes to the definition of a content folder, the system flags only that content folder as now being in a Working state. However, changes made to a content folder usually affect the behavior of all of its descendant content records and content folders, so you generally must re-publish all of its descendants too. This is where the Publish All Items and Publish Working Items, Regenerate Published Items options become useful:
- Use Publish All Items to effectively reset the expiration countdown timer for all descendant content records that are controlled by the Content is considered expired n days after last published field.
- Use Publish Working Items, Regenerate Published Items if you do not want to affect the current expiration countdown timer for all descendant content records.

  Publish children as well?

  (displayed only for some definition object types)

  If the selected definition object or folder has children, such as a navigation item in the Manage sitemaps tree or a subfolder in the Manage websites tree, then all descendants of the definition object or folder will be published too.

  Note: This option is not displayed for content folders because the publishing process for a content folder always applies to all of the content folder's descendants.

  Publish Working Items Only

  (displayed only for some definition object types)

  Publishes only the selected definition objects that currently have a status of Working. Selected objects that are in any other state are ignored.

  Publish All Items

  (displayed only for some definition object types)

Publishes all of the selected definition objects regardless of their status. Objects that are currently in a Published state have their Updated on date reset to the current date.

Publish Working Items, Regenerate Published Items

(displayed only for some definition object types)

Publishes all of the selected definition objects regardless of their status. The Updated on date remains unchanged for objects that are currently in a Published state.

Close this window after submitting for publish?

Prevents the publishing results from being displayed, which can reduce the number of clicks you must make when publishing. This option is saved as a preference until you change it again.

Enabling workflow for content authoring

When defining a content folder, use the Workflow Management section to assign a content authority group and a content owner to a content folder. All content records created in that content folder will subsequently progress through the content authoring workflow that is defined by the permissions assigned to each member of the content authority group:

- Any content authority group member who has Content Editor permissions can be assigned as the content owner for the content folder or for individual content records within that folder. If for any reason this member becomes ineligible to be a content owner, the member who has Default Owner permissions is automatically assigned as the new content owner for the content folder or content records that were assigned to the now-ineligible content owner. Events that can make the current content owner ineligible include:
- The content owner is removed from the content authority group assigned to this content folder.
- The content owner's Content Editor permissions are revoked within the content authority group assigned to this content folder.

- A different content authority group is assigned to the content folder and the current owner is not a member with Content Editor permissions in the newly assigned content authority group.

  Note: For content folders that have a content authority group assigned to them, the Owner of this content value is not copied to new content records that are created inside the content folder. Instead, content records automatically have this value set to specify the first person who created the content record, which you can subsequently modify as needed.

  Caution! A content record does not have a content owner automatically assigned if it was created by a person who is a member of the SysAdmin role, but who does not have Content Editor content authority group permissions in at least one content authority group.

- The Content Designer Task List for each member of the assigned content authority group lists the content records that they can take action upon.
- Content authority group members who have Content Editor permissions see content change requests and expiring content records in their Task List. They also see content records they have been defining and which are still in Working status.
- Content authority group members who have Content Approver permissions see content publishing requests and content deletion requests in their Task List.

  The assigned content owner for the content folder must be a member of the assigned content authority group. Unlike other content authority group members, the content owner receives email notification of expiring content records. For specific content records within the folder, you can specify a different owner other than the default owner assigned to the parent content folder. This different owner must be a member of the content authority group assigned to the content folder, and must also have Content Editor content authority group permissions.

  Disabling workflow for content authoring

  If a content folder does not have an assigned content authority group, then no workflow management takes place for the content records within that folder:

- Content change requests and expiring content records appear in the Content Designer Task List for every user in the system who has been assigned Content Editor permissions in any content authority group.
- Content publishing requests and content deletion requests appear in the task list for every user in the system who has been assigned Content Approver permissions in any content authority group.
- No email notifications of expiring content records are received.

Defining content layouts

Go to RiSE > Content Designer >Manage content layouts:

Do the following to define content layouts:

- Go to New > Content Layout Definition to create a new content layout.
- Click Edit to change an existing content layout.
- Select a content layout, then go to Organize > Delete to delete the content layout. You can define content layouts with the Content Layout Editor in one of two ways:
- Use the Tool Box to create simple layouts by adding rows and specifying how many columns are in each row.
- Click Create Custom Layout to code more complex layouts:
- In the Layout Code field, insert the HTML and CSS code to create your custom content layout. If you are using CSS, you have the option to either add your custom styles to an existing CSS file in your application server's App_Themes\[WebsiteName] directory, or to add a custom CSS file to that same directory. All CSS files in this directory are automatically loaded into the browser memory in alphabetical order. If duplicate selectors exist in this directory, then the attributes used in the last-loaded selector are used if there are any conflicts. For example, if you have body {color:blue; margin:10px;} in aastyle.css and you have body {color:red; width:50%;} in zzstyle.css, then the font color will be red and both the margin and width attributes are applied because they do not conflict.

- If you are using the YUI Grids CSS library, you can overload the CLASS attribute of a <DIV> element that functions as an iPart zone with first to indicate that this is the first of a series of grids, which helps floats and margins to work more smoothly.
- You can overload the CLASS attribute of a <DIV> element that functions as an iPart zone with shade to highlight that grid with a gray background in the layout preview image, so that you can see the relative dimensions of each iPart zone.
- Inside each <DIV> element that functions as an iPart zone, insert a single <P> element with a number that identifies the iPart zone. For example, if your layout comprises four iPart zones, the content of each <P> element could be the numbers 1, 2, 3, and 4, respectively. These <P> elements do not appear in the rendered content record if no iPart has been added to an iPart zone.

  For example, the following code creates two equally-divided iPart zones in the top row, with two smaller, equally divided iPart zones beneath the left top iPart zone (and nothing beneath the top right iPart zone):

```
<div id="bd">
 <div class="yui-g">
  <div class="yui-u first shade"> <!-- top left 50% zone -->
    <div>
     <p>1</p>
    </div>
    <div>
     <div class="yui-u first shade"> <!-- bottom left 25% zone -->
      <p>3</p>
    </div>
    <div class="yui-u shade"> <!-- bottom right 25% zone -->
```

```
        <p>4</p>
      </div>
      </div>
    </div>
    <div class="yui-u shade"> <!-- top right 50% zone -->
     <p>2</p>
    </div>
   </div>
  </div>
```

Troubleshooting

- You must have Layout Editor content authority group permissions in at least content authority group to which you belong.
- If you plan to code custom content layouts, you must be familiar with CSS layout techniques.
- The default content layouts shipped with iMIS are always overwritten during upgrades, so the best practice is to create new content layouts rather than modifying the default layouts. Take care to name your user-created content layouts uniquely to prevent iMIS from treating them as standard iMIS content layouts during an upgrade. An easy technique to ensure unique naming is to prefix the name with an acronym for your organization, such as "ORG One Over Two".

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

  Tip: Supported layout types

Although iMIS uses DIV-based CSS layout, you can use table layout or any combination of HTML elements that you prefer. The only absolute requirements are:

- You must insert a single element with only a single number inside the element where you want each iPart zone to be located in your layout. Use unique numbers for each iPart zone, starting with 1. You must also have at least one of these [number] strings in your custom content layout. iMIS content management looks for these strings to determine how many iPart zones are in the layout, and where they are located. Any other content inside of a element other than a single number is not considered as being an iPart zone, and the content is copied directly to the rendered output of the content record.
- The HTML elements that you use must be valid in the context of a <body><form> container. For example, you cannot use a <head> element in your custom content layout.

  You can also add ASPX code and other markup to add standard elements to a layout, such as always including a search box or a logon control on a given content layout. These elements will be available in the published output of a content record, but they will not be visible when previewing your custom content layout in the layout editor.

  More

- YUI Grids CSS Library

Managing images

Go to RiSE > Content Designer > Manage images:

To help you to organize your site images where they cannot be overwritten during upgrades, iMIS uses one system-defined path for all of the image files that you upload. This setting is honored by the Image Manager and by all iParts that reference uploaded images, such as Content HTML, Content Block, and Contact Profile Picture.

For clarity, iParts that manage images specific to a feature organize those files into subfolders below your default. Any filenames ending with _T are thumbnails that iMIS generates for you.

- Event images are stored in /Events
- Product images are stored in /Products

- Contact (individual and organization) images are stored in /Profile.

  Tip: Theme-related images are managed within appropriate theme folders.

  Changing the upload folder for images

  Go to RiSE > Set up content management > Content designer configuration:

  To change the upload folder for your images, change the CM.ImagePath variable in your SystemConfig table. You can set this in Content Designer configuration.

  For example, the following SQL command changes the path to a folder called foo in the root directory:

  Update SystemConfig set ParameterValue = '~/foo' where ParameterName = 'CM.ImagePath'

  For best results, choose one of the following locations for your uploaded images folder:

- On your web root: ...\ASI\iMIS\Net\
- In the SharedContent folder: ...\ASI\iMIS\Net\SharedContent\

  Important: The path to this directory must be the same on all servers that host your iMIS sites.

  Uploading images

  Before you can use image files in your iParts, you must upload them to the server. You can do this while configuring a Content Html iPart, or you can do this using Image Manager, which makes it easy to upload and organize a set of files.

- Using the ContentHtml editor – While defining a content record, add a Content Html iPart and configure it to display the HTML editor:

1. In the editor's toolbar, click the Image Manager button.
2. (Browse Files tab) Open the folder from which you want to upload a new image.
3. (Upload Image tab) Click Browse.
4. Select the local file that you want to upload.

5. Click OK.
6. Click Upload.

   Tip: To reuse an image hosted on an external server, use the Content Html iPart and insert a standard HTML <IMG> tag to that image.

- Using Image Manager – In Content Designer, select Manage images.

  Go to RiSE > Content Designer > Manage images:

1. Open the folder in which you want to upload a new image, or click the New Folder icon to create a new folder ( ).
2. Click the Upload icon ( ) and browse to the file on your computer that you want to upload.
3. Click OK.
4. Click the Upload link at the right of the Upload field. To cancel the upload, click the Upload icon in the toolbar.

   Both the HTML editor and the Image Manager have a built-in Image Editor that can perform some basic edits to images that you have already uploaded.

   Caution: Do not use Image Editor with transparent images. The transparent background becomes black. To edit transparent images, right-click on the image and select Save Image As to save a copy locally. Edit the image with your preferred program, then upload the image to iMIS again, overwriting the original copy.

   Troubleshooting

- To upload images, you must have Content Upload content authority group permissions.
- To upload from a network location, first map that folder to a drive letter on your workstation.
- Theme images (used by Big Button Panel) do not auto-sync between servers.

Tagging

Defining tags

Go to RiSE > Tagging > Define tags:

Do one of the following:

- Click New to create a new tag. Enter a Tag Name. Define the tag's Properties, Related Tags and Access Settings.
- Select an existing tag to edit the tag's properties. Define the tag's Properties, Related Tags and Access Settings, if necessary.
- Select an existing tag, and then click Delete to delete the tag.

When you create a child tag, it automatically copies the properties of the parent tag. Subsequent changes to the parent tag's properties do not affect the child tag.

You can reorganize the tag hierarchy by dragging and dropping tags into new positions. Drop tag A onto tag B to make A subordinate to B (A becomes a child of B, and B is the parent of A).

Troubleshooting

- You must be a member of at least one content authority group.
- Although no specific Document System permissions are required to define tags, the people who perform web content authoring must have Select Document System permissions on a tag to be able to assign that tag to a content record or content folder.
- You must plan your tag hierarchy in a manner that accounts for the effect of implied relationships between parent and child tags in the hierarchy. A tag's position in the tag hierarchy creates an underlying relationship that is not specifically displayed in the Related Tags section: Parent tags are implicitly related to their children tags with a more broadly defines relationship, and children tags are implicitly related to their parent tag with a further defines relationship. This means that:

- The pre-filtered result set of a basic or advanced search includes all published content records that are tagged with any descendant of the tag that is matched by the search keywords.
- The pre-filtered result set of an advanced search includes all published content records that are tagged with any descendant of a tag that is specified in the configuration of the AdvancedSearch iPart if the user selects that tag at runtime on the rendered page that contains the advanced search form.
- The pre-filtered result set of a rendered ContentTaggedList iPart also includes published content records that are tagged with any descendent of a tag that is specified in the configuration of the ContentTaggedList.
- The content of the Items by Tag Report (in Continuum > Content Reports) does not list published content records that are tagged with any descendant of each tag in the report.

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

  #### Configuration options: tags

  These fields control the properties of tags that are defined in the system.

  Go to RiSE > Tagging > Define tags:

  Do one of the following:

- Select a tag in the tag hierarchy.
- Click New.

  Tips

- A tag's position in the tag hierarchy creates an underlying relationship that is not specifically displayed in the Related Tags section: Parent tags are implicitly related to their children tags with a more broadly defines relationship, and children tags are implicitly

related to their parent tag with a further defines relationship. This means that:

- The pre-filtered result set of a basic or advanced search includes all published content records that are tagged with any descendant of the tag that is matched by the search keywords.
- The pre-filtered result set of an advanced search includes all published content records that are tagged with any descendant of a tag that is specified in the configuration of the AdvancedSearch iPart if the user selects that tag at runtime on the rendered page that contains the advanced search form.
- The pre-filtered result set of a rendered ContentTaggedList iPart also includes published content records that are tagged with any descendent of a tag that is specified in the configuration of the ContentTaggedList.
- The content of the Items by Tag Report (in Continuum > Content Reports) does not list published content records that are tagged with any descendant of each tag in the report.

  Tag Name

  Specifies the tag name, which can comprise multiple words with spaces and even some special punctuation characters.

  Tag Description

  Specifies a description of the tag that is oriented to the people who perform web content authoring and website management. This text is not displayed anywhere except when editing the definition for a tag.

  Aliases

  Specifies a comma-delimited list of other terms that are synonymous with the Tag Name. If these alias terms are entered by the user in a basic or advanced search panel, all content tagged with the associated Tag Name will be listed in the search results, but with a lower relevancy than if the actual Tag Name had been used in a search.

  Access Settings

Specifies the Document System permissions granted for this definition object to iMIS security roles, security groups, specific iMIS users, iMIS member types, or to all Full and Casual users based on their assigned authorization levels.

- Apply changes to all descendants – Changes to this section, when saved, flow automatically to all descendant definition objects. When cleared, changes to this section apply only to the current definition object. This checkbox usually appears only on Document System folder objects.
- Use a preconfigured security set – Specifies a preconfigured security configuration to use for this definition object, which can be much simpler than using the Make this available to option to specify the permissions for definition objects. The specific permissions in the preconfigured security configuration are displayed (read-only) in the Make this available to area.

  If you select a preconfigured security configuration and then switch to the Make this available to option, the permissions granted by the preconfigured security configuration are copied. This enables you to use a preconfigured security configuration as a starting point for defining custom permissions.
- Make this available to – Lists the roles, groups, users, member types, or authorization levels that have been enabled to define or view rendered output from this object. This option enables you to specify custom permissions for the definition object if none of the preconfigured security configurations meets your needs. The SysAdmin, Content Administrator, and Everyone roles are default system-defined security roles that are assigned to every definition object. The SysAdmin role is assigned in the definition of an iMIS user record, but the Content Administrator role is automatically assigned to every iMIS user who is a member of a content authority group (CAG) that is designated as a Master Admin content authority group.

  The permissions that can be assigned to each entry in the list are:

- Full Control – Enables all of the following permissions.
- Read – Enables users to see this object both in definition windows and as rendered output in websites, but they cannot change the object's definition.

- Add – Enables users to create new objects, or to paste or import an object into the Document System.
- Edit – Enables users to edit this object's definition, but not to delete the object.
- Delete – Enables users to delete this object.
- Select – Enables users to assign a tag to content folders and content records.

  Related Tags

- Automatically create reciprocal relationships – (Displayed when you click Add in the Related Tags section of the tag definition)

  Creates an appropriate reciprocal version of the relationship type specified for this tag in the target related tag. For example, if you specify a more broadly defines relationship in the Choose a relationship type drop-down list for this tag, the target tag will have an explicit further defines relationship created that points back to this tag.

  If this checkbox is subsequently cleared on either side of a reciprocal relationship, the corresponding checkbox will automatically be cleared on the other side too.

- Choose a relationship type – (Displayed when you click Add in the Related Tags section of the tag definition)

  Specifies an explicit type of relationship from this tag to another tag.

  Explicit tag relationships currently affect only search results. If these related tags are entered by the user in a basic or advanced search panel, all content tagged with the associated Tag Name will be listed in the search results, but with a lower relevancy than if the actual Tag Name had been used in a search.

  Explicit tag relationships currently have no effect on the dynamically rendered list of content records from a ContentTaggedList iPart, nor in the content of the Items by Tag Report (in Continuum > Content Reports).

  Explicit tag relationships are not transitive. If A is related to B, and B is related to C, there is no relationship between A and C. Neither are these relationships implicitly reciprocal.

You must manually create the reciprocal relationship or select the Automatically create reciprocal relationships checkbox when defining an explicit relationship to other tags.

Note: The specific type of relationship has no particular functionality. Future releases might make use of specific relationship types, but currently all types of explicit tag relationships yield the same search results as a term specified in the Tag Alias List field.

Defining tagged list formats

Do the following to define tagged list formats.

Go to RiSE > Tagging > Define tagged list formats:

Do one of the following:

- Select New > Tagged List Format to create a new tagged list format.
- Select an existing tagged list format. Click Edit to modify that list format.
- Select an existing tagged list format. Select Organize > Delete to delete that tagged list format.

Verify a tagged list format's behavior by using it in a ContentTaggedList iPart, then previewing a content record that contains the iPart.

Troubleshooting

- The default tagged list formats shipped with iMIS are always overwritten during upgrades, so the best practice is to create new tagged list formats rather than modifying the default ones. Take care to name your user-created tagged list formats uniquely to prevent iMIS from treating them as standard iMIS tagged list formats during an upgrade. An easy technique to ensure unique naming is to prefix the name with an acronym for your organization, such as "ORGSimpleWithHTML".

Concept: tags and tagged list formats

Tags are a special type of keyword that you can associate with content records to searches that are more powerful and the automatic population of content based on tags. All descendants of a content folder inherit the tags defined for the folder. You can tell

which tags are being inherited from a content folder higher in the content folder hierarchy by viewing the Current Tags section of a content folder's or content record's definition.

- AdvancedSearch iParts specify various tags that your iMIS content management website users can select to narrow their search to a smaller set of tagged content records.
- ContentTaggedList iParts specify various tags that are used to generate a real-time list of links to tagged content records when the content record containing the ContentTaggedList is viewed.

  Tagged list formats are used by ContentTaggedList iParts to format the rendered display of the list of links. The chosen tagged list format is applied as a display mask to each item in the list. For example, one tagged list format might display only a simple list of links, while another tagged list format might display a link followed by an HTML fragment from the target content record.

  Unlike some other content authoring systems and web applications, you cannot create ad hoc tags while defining content records. Instead, you must choose from a list of predefined tags that are usually defined by the people who perform website management. This restriction ensures that your content is tagged with a centrally designed taxonomy, which provides more consistent and predictable search results from ContentTaggedList iParts.

  Tags are defined in a hierarchical structure, with every parent tag having an implicit more broadly defines relationship to its children tags, and every child tag having an implicit further defines relationship to its parent tag. In general, this means that if you use a parent tag in an AdvancedSearch or ContentTaggedList iPart, all descendant tags are automatically included as well.

Configuration options: tagged list formats

These fields control the properties of tagged list formats that are defined in the system.

Go to RiSE > Tagging > Define tagged list formats:

Do one of the following:

- Select New > Tagged List Format.
- Select an existing tagged list format, and then click Edit.

Tips

- Tagged list formats are used by ContentTaggedList iParts to format the rendered display of the iPart. You specify the tagged list format to use in the List Format field of the ContentTaggedList configuration.
- The default tagged list formats shipped with iMIS are always overwritten during upgrades, so the best practice is to create new tagged list formats rather than modifying the default ones. Take care to name your user-created tagged list formats uniquely to prevent iMIS from treating them as standard iMIS tagged list formats during an upgrade. An easy technique to ensure unique naming is to prefix the name with an acronym for your organization, such as ORGSimpleWithHTML.
- The format you define here is applied as a display mask to a single item in a ContentTaggedList iPart. This format is repeated once for each item content record in the list rendered from the iPart. The basic elements of a tagged list format are:
- One or more content record property labels to explain a following content record property value.
- One or more content record property values.
- A single link to the content record itself.
- HTML fragments.

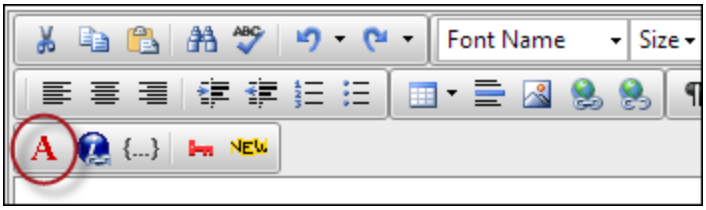
  While none of these elements is actually required by the system, at a minimum you should at least insert the link to the content record itself.
- The content record property values are all read-only values.
- The tagged list format editor is essentially the HTML editor used for Content Html iParts, with some iMIS-specific toolbar buttons at the right of the bottom toolbar, and a list of embeddable content record properties at the right of the editor.

If you find some features of the HTML editor confusing, you can download the RadEditor user manual from the Telerik Documentation site.

Note: Some features described in this external document have not been enabled for use when defining Content Html iParts or tagged list formats.

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

iMIS Label Manager (toolbar button - red "A")



Edits a content record property value that has been inserted in the editing area in the following possible ways:

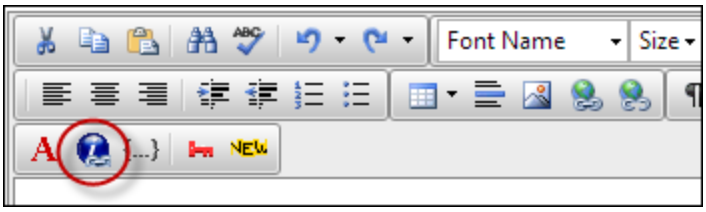
- Changes an existing content record property value in the editing area to a different property. You must place your cursor somewhere inside the existing property value before clicking this button.
- Enables you to define a display mask for date-oriented and numeric property values.

  Tip: While you can use this toolbar button to insert a new property value, it's much easier to insert new values by clicking the red A icons in the Content - Properties list.
- Display Value – Has no effect.
- Property – Specifies the property value in which the editing cursor is positioned. If you select a different property value from the list, it will replace the property value in which the

editing cursor is positioned.

- Display Format – Specifies a display mask for date-oriented and numeric property values. To view a list of the syntax you can use for the display mask, click View complete list of Date/Time and Number formats.

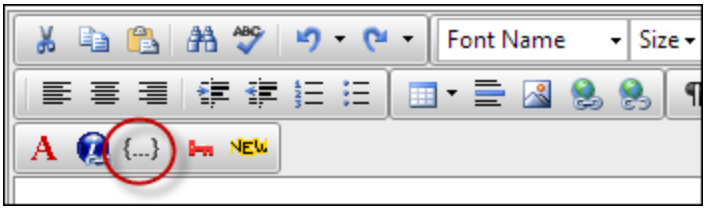
  iMIS Hyperlink Manager (toolbar button - globe and chain)



  Creates a link to the content record itself, enabling you to define the anchor text for the link in various ways.

- Dynamically based on Property – Specifies anchor text that is different for every content record in the rendered ContentTaggedList iPart. The anchor text will be the selected content record property value.
- Static text – Specifies anchor text that will be the same for every content record in the rendered ContentTaggedList iPart.
- Display Format – Specifies a display mask for date-oriented and numeric property values if you specify the anchor text to be Dynamically based on Property. To view a list of the syntax you can use for the display mask, click View complete list of Date/Time and Number formats.

  iMIS Conditional Display Manager (toolbar button - {…})



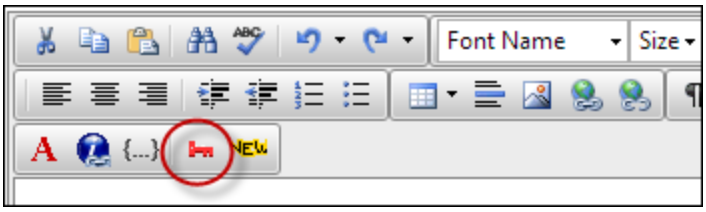
  Specifies a single conditional display parameter for any element of the tagged list format (property label, property value, link, or HTML fragment). You must select the entire

element before clicking this button. When you insert the conditional parameter, the element is surrounded by braces { } to indicate that it is a conditional display block.

To simulate ELSE arguments for the conditional display of an element, you can copy and paste the element inside a conditional display block to a position immediately following the existing display block, then select the copied element and click this button to create a new conditional display block with a different parameter.

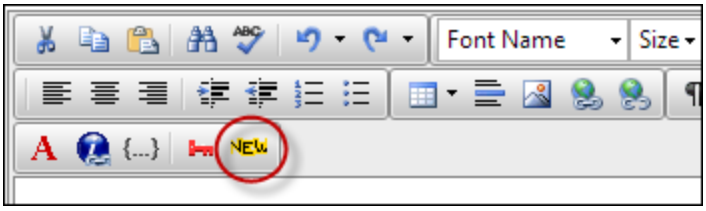
Note: The iMIS Conditional Display Manager is a generic conditional display control shared among several iMIS features. Therefore, you should be careful to choose values that make sense in the context of conditional display of an element in a tagged list format. As a rule, you should use the default values for Data type, Comparison type, and Source. The only value you should change is for the Value drop-down list, to specify the content record property value that you want to ensure is not empty before displaying this element.

Insert 'Members Only' Marker (toolbar button - red key)



Inserts a graphic icon that is conditionally displayed for an item in a rendered ContentTaggedList iPart if the Content is restricted to members checkbox is selected in the Properties section of the corresponding content record.

Insert 'New' Marker (toolbar button - NEW)



Inserts a graphic icon that is conditionally displayed for an item in a rendered ContentTaggedList iPart if the Mark as important until field in the Properties section of the corresponding content record contains a value and that date has not yet passed.

Content - Properties

Lists the content record properties that can be used as elements in the tagged list format. The list of available properties includes all iMIS content management user-defined fields (UDFs) that are defined in the system.

- P icon – Inserts a pre-defined label for the corresponding content record property. You can modify this label after it has been inserted into the editing area.
- A icon – Inserts a string variable, delimited by brackets [ ], that will display the actual value of the content record property for each item in the rendered ContentTaggedList iPart. You should not directly edit this string, but you can safely delete it or change it by putting the cursor inside the string and clicking the iMIS Label Manager button on the toolbar.

  Note: The string variable created by the A icon is not a link. To make the rendered replacement text of a string variable be a link (such as making the Title property a link to the actual content record), you must use the iMIS Hyperlink Manager.

  Note: If you insert an HTML property value, the rendered ContentTaggedList iPart displays the full content of all Content Html iParts in the content record, concatenated together with no visible divisions between them.

Maintenance

Website maintenance comprises the ongoing tasks that you periodically perform to help you troubleshoot your iMIS content management websites and manage the publishing queue for each publishing server.

Defining publishing servers

To define publishing servers

Go to RiSE > Maintenance > Publishing servers:

Select an existing publishing server to change its properties, or you can add or delete a publishing server.

Tips

- All references to "the publishing service" refer to a specific instance of the AsiPublishing15 service. You can install multiple instances of this service to any web server on which iMIS content management navigation items and content should be published, but each instance must have a unique single-letter identifier.
- If you need to create multiple publishing servers, you must manually create a new publishing server for each IIS application and IIS website. When you define a new publishing server, the Frequency and Publishing Speed values default to zero. You should set them to Frequency=10 and Publishing Speed=100.

  Note: You must associate no more than one publishing server with each publishing service. If your environment has more than one IIS application or IIS website that is hosting iMIS content management websites on a given server, you must install one publishing service for each such IIS application and IIS website, and you must define a single corresponding publishing server for each publishing service. For more information, refer to Installing CM on web servers.

  To verify/change a publishing service code

  Do the following to verify or change the Publishing Server Code assigned to an installed publishing service:

1. Open the PublishService.exe.config file in a text editor on the appserver or external web server. Default location is C:\Program Files\ASI\iMIS\Net\bin
2. In the <SystemParams> declaration, verify or change the value of the PublishServerCode key. The value must be a single uppercase letter from A to Z, and must be unique among all publishing services used by a given instance (database) of iMIS.

   To manually define additional publishing servers

   The iMIS installer automatically defines a corresponding publishing server for the default instance of the publishing service installed by iMIS. However, in some iMIS content management installation scenarios, you must manually install one or more additional instances of the publishing service at a command line.

1. Manually create a single corresponding publishing server for every publishing service that you have manually installed.
2. When you add a new publishing server, review the Publish on Servers property for all existing content folders to specify whether the rendered files from content records in those folders should be made available to the iMIS sites that are associated with these manually-created publishing servers.

   To define sets of publishing service codes

   When you install iMIS content management on a web server (or install an additional publishing service for each manually created IIS application or IIS website), you are prompted to specify a Publishing Server Code to uniquely identify the publishing service that is created during installation (it always defaults to the value A). When you define a publishing server in the iMIS content management environment to control the behavior of a specific publishing service, you use this code to link the publishing service to its corresponding publishing server.

   The Publishing Server Code must be unique among all publishing services used by a given instance of iMIS. For example, your production iMIS server might use the code A to identify its instance of the publishing service, and you might also have three other external web servers located in different geographic locations whose Publishing Server Codes might be B, C, and D, respectively.

   Tip: You can duplicate codes across test and production instances, since they're still unique within their specific databases.

   Caution! The publishing server associated with the base iMIS installation must always be defined as the only Default (the one PublishServerRef row set with the IsDefault flag). Unless this one instance is set as the default, the Multi-Instance Utility will not work as expected.

   Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must already have installed iMIS content management on one or more web servers and noted the Publish Server Code that you specified to use for the iMIS publishing service that was installed during that process.

  Note: You must associate no more than one publishing server with each publishing service. If your environment has more than one IIS application or IIS website that is hosting iMIS sites on a given server, you must install one publishing service for each such IIS application and IIS website, and you must define a single corresponding publishing server for each publishing service. See Installing iMIS content management on web servers.

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

  Managing the priority of pending publication requests

  Go to RiSE > Maintenance > Publishing Servers:

1. If the Number of Pending Requests for a publishing server is a non-zero value, click detail to view the current publishing requests queue.
2. Change a request's priority in the queue by using the Priority drop-down list.
3. Click Save to process these changes.

  Viewing iMIS content management reports

  Go to Continuum > Content Reports:

1. Select a report.
2. Click Run.

3. If a query parameters window appears, specify the additional required parameters that you are asked for, and then click Run.

   Creating new iMIS content management reports

   All iMIS content management reports are standard Document System report definition objects that are based on Intelligent Query Architect (IQA) queries. Some default reports are included with iMIS content management, and you can define additional reports using the techniques described in Reporting Essentials.

   Concept: publishing servers versus publishing services
   The publishing service is used by Site Designer when publishing new websites and when adding pages to an already existing website:

- iMIS uses publishing services to render and place files into the local file system of web servers that have been prepared to host iMIS content management websites. Currently, these files are:
- Rendered output of a content record (browser-readable .aspx files)
- Downloadable file attachments that are defined in a ContentFile iPart
- iMIS does not push files to a publishing service when an iMIS user performs an action that publishes a content record. Instead, every publishing service regularly polls the iMIS database to check whether any publishing requests have been queued up for the corresponding publishing server. For more information, refer to Concept: publishing CM content.

  An iMIS content management publishing server is an added control layer to a specific instance of an iMIS publishing service that provides important configuration information and enables sophisticated publishing control for content records developed with the Content Designer tool.
- Through the publishing server's assignment to the Publish on Servers field in content folders, the publishing service can determine which content records it should render when it finds publishing requests during each polling interval.

- Through the Local Protected Path and Local Publish Path fields in the publishing server definition, the publishing service can determine where to place specific types of files in the file system of web servers that have been prepared to host iMIS content management websites.

  When you install iMIS on a server host, the installer automatically defines a corresponding publishing service/publishing server pair:

- A single default instance of the Windows service AsiPublishing15 is placed on the server host, identified by a unique code string that you specify during installation.
- Connection information to the iMIS database is automatically defined by the installer.
- A corresponding publishing server is defined in the iMIS database and given a default configuration. Go to Maintenance > Publishing servers to change the default configuration.

  Configuration options: publishing servers
  These fields control the properties of publishing servers that are defined in the system.

  detail

  (displayed only in the main list of defined publishing servers)

  Lists the currently pending and recently completed publishing requests for the associated publishing server. You can cancel pending requests or change their priority in the publishing queue. Changes to pending requests are processed when you click Save.

  error log

  (displayed only in the main list of defined publishing servers)

  Lists the errors reported by the publishing server. You can remove errors from the list by selecting the corresponding checkbox and clicking Delete Selected.

  Description

  Specifies the name of the publishing server that is displayed in the list of publishing servers in your iMIS content management environment.

  Publish Server Code

Specifies the unique single-letter identifier of the AsiPublishing15 service that this publishing server controls. This must be a single uppercase letter from A-Z, which means that you can define at most 26 different iMIS publishing services in your iMIS content management environment (one publishing service per IIS application or IIS website that hosts iMIS content management websites, with one corresponding publishing server per publishing service defined in iMIS content management to control each publishing service).

Local Publish Path

Specifies the root directory where the rendered .aspx files from published content records should be written on the server where the publishing service is running. This directory must be within the physical path of the IIS application or IIS website that hosts iMIS content management websites.

By default, this path is C:\Program Files\ASI\iMIS\Net.

For 64-bit systems, the path must be changed to reflect the installation path default of C:\Program Files (x86)\ASI\iMIS\Net.

The uploaded files are written to system-created directories below the one that you specify here. Each directory corresponds to a content folder in the iMIS content management content folder hierarchy. Uploaded files are placed into the directory that corresponds to the parent content folder of the content record in which the ContentFile iPart is defined.

Local Protected Path

Specifies the root directory where the uploaded files defined in a ContentFile iPart (for example, Word, Excel, PowerPoint, PDF, and so forth) should be written on the server where the publishing service is running. For security reasons, this directory must not be in the IIS Physical Path of any website, virtual directory, or application in IIS. In other words, the files in this directory must not be able to be linked to directly by web browsers. Instead, they are served to the client only after security permissions are verified.

By default, this path is C:\Program Files\ASI\iMIS\indexServiceProtected.

The uploaded files are written to system-created directories below the one that you specify here. Each directory corresponds to a content folder in the iMIS content management

content folder hierarchy. Uploaded files are placed into the directory that corresponds to the parent content folder of the content record in which the ContentFile iPart is defined.

IP Address

Specifies the IP address of the computer that is running the AsiPublishing15 service for this publishing server. This is usually the IP address of the iMIS application server. You can run this service on a different computer than the iMIS application server, but there is no real benefit in doing so because the publishing service is not resource-intensive.

Alternate Server IP Address

Specifies an additional IP address of the computer that is running the AsiPublishing15 service for this publishing server, used for web servers that associate themselves with more than one IP address. You cannot specify a value for this field unless you have already specified the Server IP Address.

Frequency

Specifies the interval, in seconds, at which the publishing server should check for new PublishPending requests.

Publishing Speed

Specifies the maximum number of PublishPending requests that should be processed in each Frequency interval.

IIS Security

Specifies the authentication credentials for a Windows account that has permission to create, update, and delete content in the Local Publish Path that is specified in the Publishing Server Properties area.

These fields are required only when IIS security is used to protect IIS website content.

- IIS Security User Name – Specifies a windows user name.
- IIS Security Password – Specifies the password associated with the windows user name.

- IIS Security Domain – Specifies the Windows domain name if the Windows account being used is a domain account instead of a local account.

Defining user-defined fields

Do the following to define user-defined fields (UDFs).

Go to RiSE > Maintenance > User Defined Fields:

1. Select an existing iMIS content management user-defined field to change its properties. You can also add or delete a user-defined field.
2. Verify an iMIS content management user-defined field's appearance and behavior. Edit a content record. Review the Properties tab, between the Mark as important until field and the Help URL field.

   Note: When you add, change, or delete an iMIS content management user-defined field, existing content records and their rendered .aspx files will not reflect the changes until you edit the content record, specify the desired value for the user-defined field, then re-publish the content record.

   Concept: user-defined fields (UDFs)

   User-defined fields (UDFs) in iMIS content management are created differently, and serve a very different purpose, than user-defined fields in iMIS contact records:

- The UDFs found in iMIS contact records enable you to collect custom information about a contact. These contact UDFs are not available for use in iMIS content management.
- The UDFs found in iMIS content management are primarily useful as a way to capture additional properties of the content in content records, and to provide a controlled list of search criteria for use in iMIS content management only. These iMIS content management UDFs can be used in three ways:
- As a value added to the keywords <META> element in the rendered page for the content record, which enables searches performed through the iMIS content management search engine (but not by typical external web-based search engines) to locate the content record by searching for this value. This behavior is controlled by the Use in Search? property of an iMIS content management UDF.

- As a search filter in AdvancedSearch iParts, applied to the initial result set based on the tags and keywords specified in the search.
- As both filtering criteria and sorting criteria in ContentTaggedList iParts. A date-oriented UDF can be used to filter the initial result set based on the chosen tags, and a different UDF of any type can be used to sort the the final result set.

  Every UDF defined in iMIS content management is added as a new custom property to every content record, and can be displayed in a wide variety of formats, from a simple text field to a drop-down list, to a calendar control, to a set of radio buttons, and so on. In the advanced search panel rendered from an AdvancedSearch iPart, the user-defined field appears exactly the same way that it does in content records. This enables iMIS content management website users to specify UDF values for advanced searches in the same manner that the UDF values are chosen when authoring content. For example, a date-oriented UDF will have a calendar control that makes it easy to select a date.

  Configuration options: User defined fields

  Use In Search?

  The value specified in the corresponding UDF in a content record is added to the keywords <META> element in the rendered page for the content record, which enables searches performed through the iMIS content management search engine (but not by typical external web-based search engines) to locate the content record by searching for this value. When cleared, the value specified in the corresponding UDF is not added to the keywords <META> element in rendered pages.

  Because this value is added to the keywords <META> element, the relevancy weighting of search results is affected by the SE.SearchKeywordHint field Set up content management > Search configuration.

  Sort Order?

  Specifies the order in which this UDF appears in the total set of UDFs in the Properties section of content records. The value you specify must be in the range 1 to n, where n is the total number of iMIS content management UDFs defined in the system.

If you delete an iMIS content management UDF or change this value for any iMIS content management UDF, the system automatically recalculates this value on all other UDFs to ensure that this value in all iMIS content management UDFs stays within the range 1 to n. Therefore, it's generally a good idea to double-check this value on all iMIS content management UDFs when you make these types of changes, because the automatic recalculation might change the original order.

Is Required?

All content records that are defined after this UDF definition is saved will require a non-blank value to be specified in the corresponding UDF in the content record. When cleared, the corresponding UDF in content records will be an optional field.

Label

Specifies the label for this UDF that will appear in content records.

Display Width

Specifies the unit measurement, in pixels, of the width allotted to variable-entry Display Controls such as Text Field or Text Area.

Display Height

Specifies the unit measurement, in pixels, of the height allotted to variable-entry Display Controls such as Text Field or Text Area.

Allow Multiple Selection?

Specifies that items in a list-based Display Control can be multi-selected. When cleared, only one list item can be selected at a time. This checkbox does not become active until after you select a list-based Display Control and click Save.

Display Orientation

Specifies the orientation of certain multiple-object Display Control types, such as Check Box(es) or Radio Buttons.

- Horizontal – Arranges the display controls in left-to-right order.
- Vertical – Arranges the display controls in a top-to-bottom order.

  Display Columns

  Specifies how many columns a multiple-object Display Control such as Check Box(es) or Radio Buttons should span if the selected Display Orientation is Horizontal. For example, if the Values section creates four checkboxes and the Display Columns value is 2, the UDF will be rendered with two rows of checkboxes, with two in each row.

  References Object

  Specifies the name of the iMIS business object that has the source properties used to populate the values for list-oriented Display Control types, such as Drop Down List or Radio Buttons. Use this field only in conjunction with the Value List option in the Values Come From area.

  Default Value

  Specifies a value that should be pre-filled or pre-selected in this UDF when a new content record is created.

  Values Come From

  Specifies the source of the values for the UDF. The available choices depend on the type of Display Control.

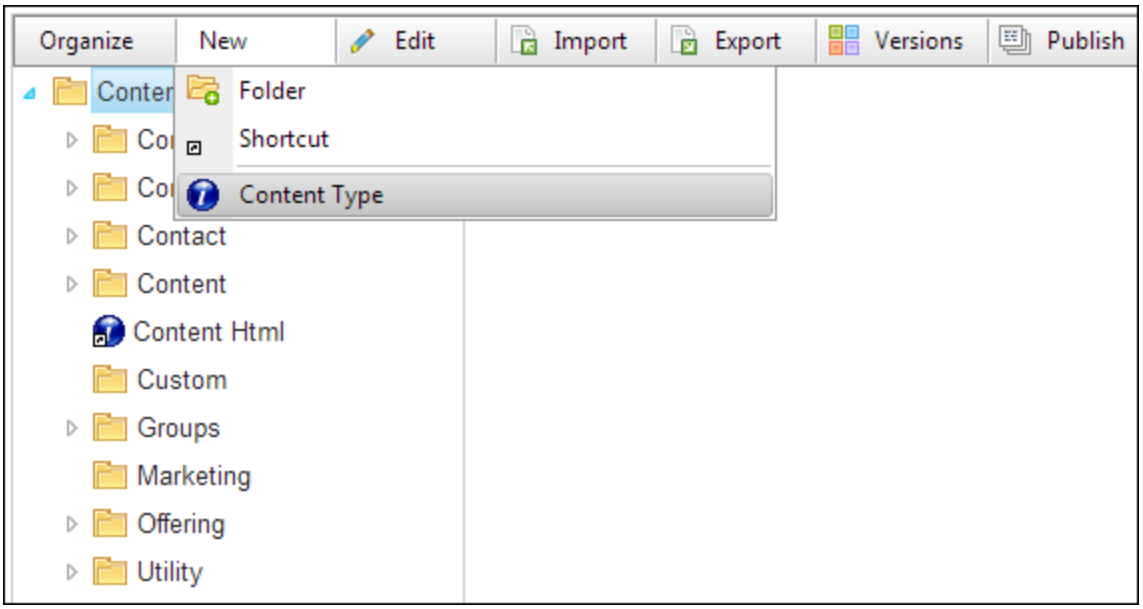
- Freeform data entry – Requires users to enter the value manually, such as for a Text Field or Text Area.
- Finder – Requires users to interact with a finder dialog before the values are populated for the UDF. This is automatically selected when the Display Control is a Finder. No other Values Come From option is available in this case.
- Query Object – Produces a discrete list of possible values for the UDF in a content record, based on the results of the IQA query that you select here. This choice is available only if the Display Control allows for list-oriented data entry, such as Drop Down List or Radio Buttons.

- Data Value – Specifies which property/field of the Query Object is stored when you make a selection.
- Display Value – Specifies which property/field of the Query Object appears as the list-oriented labels in the user-defined field in content records.
- Value List – Produces a discrete list of possible values based on the contents of the Designer tab of the business object specified in References Object. This choice is available only if the Display Control allows for list-oriented data entry, such as Drop Down List or Radio Buttons.

Content types

Go to RiSE > Maintenance > Content Types:

- Select New > Content Type.
- Select an existing content type, then from the toolbar click Edit.



To place your control into the Content Gallery for easy sharing and reuse, create a content type.

Tips

- The class libraries and user controls that you specify must be manually copied to a file path that resolves to the same root-relative URL on all servers that host iMIS content management websites.
- The class libraries must be placed in the bin folder below the root of the physical path for the IIS application or IIS website that hosts your iMIS content management websites.
- The user controls can be placed in any folder below the root of the physical path.
- When specifying paths to controls, be sure to use forward slashes (/) for the segment delimiters.

Configuration options: Content type

Name of the Content Type, Description of the Content Type

Specifies the name and description of the associated iPart. If you are publishing this iPart in the Content Gallery, be sure this text is as you want it to appear to users in the Gallery when they select iParts for use in content records, and do not duplicate any iPart names already appearing in the Gallery.

URL to the control or page that is used to display items of this type at runtime

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to display instances of the iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

If you have not created a custom IContentType class (you entered Asi.Business.ContentManagement.ContentType.ContentTypeBase in the Name of the IContentType class within the assembly field), a declaration to this control is embedded in published pages that use the iPart, and the control will be dynamically loaded and inserted into the page when rendering the control (for preview or for search). If you've implemented a custom IContentType class, you can change this behavior to match your own requirements.

Configuration options: Advanced Properties (optional)

Name of the .NET assembly that contains the class that implements this content type

Specifies the name of the class library that contains the compiled serializable class.

Name of the serializable class within the assembly that implements this content type

Specifies the name of the class that implements the iPart in Content Designer (which must inherit the base class Asi.Business.ContentManagement.ContentItem). You must enter the fully qualified class name, including the namespace.

Name of the .NET assembly that contains the IContentType class used to publish this content type

Specifies the name of the class library that contains the compiled IContentType class.

- If you are using the base IContentType class provided with iMIS content management for this content type, enter Asi.Business.ContentManagement.
- If you are using a custom-developed IContentType class, enter the name of the class library that contains the compiled class.

Name of the IContentType class within the assembly

Specifies the name of the class that implements the IContentType interface that iMIS content management uses to render and publish the iPart.

- To use the default rendering and publishing behavior provided by the base IContentType class provided with iMIS content management, enter Asi.Business.ContentManagement.ContentType.ContentTypeBase.
- To perform custom actions when an iPart is published or rendered, you can instead create a custom IContentType class (which must inherit the base class (Asi.Business.ContentManagement.ContentType.ContentTypeBase). You must enter the fully qualified class name, including the namespace.

URL to the control or page that is used to collect the properties of a new item of this type

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to collect properties when creating new instances of the iPart associated

with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

In most cases, you should specify the same control here as for the URL to the control page that is used to edit the properties of an existing item of this type.

Note: This control is currently unused in this version of iMIS content management. Instead the control specified in URL to the control page that is used to edit the properties of an existing item of this type is used for collecting the properties for newly created iParts and for existing iParts that are being edited.

URL to the control or page that is used to edit the properties of an existing item of this type

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to collect properties when editing the configuration of an existing iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

In most cases, you should specify the same control here as for the URL to the control page that is used to collect the properties of a new item of this type.

URL to the control or page that is used to collect parameters for content items of this type

Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the web user control that should be used to collect parameter overrides for the iPart associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/myUserControl.aspx.

You use this type of control to override the configuration of an iPart on a per-navigation-item basis. The parameter overrides can be specified in two different ways in a navigation item, depending on what type of input this control is written to accept:

- The URL parameters field can pass parameters in an ampersand-delimited string that is appended to the URL that fetches the associated content record.

- The Content parameters field can actually display selected properties from the control that defines the configuration page for the associated iPart. In other words, a subset of the properties defined in the control specified in the URL to the control or page that is used to edit the properties of an existing item of this type field.

  Only one of the content types shipped with iMIS content management uses this field (ContentTaggedList), and the corresponding control is written to collect parameters from the Content parameters section of a navigation item.

  URL to the icon graphic that represents items of this type

  Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to an image file that should be displayed on rendered web pages as the Surf-to-Edit (STE) icon for iParts associated with this content type. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/CustomControls/mySurfToEditIcon.gif.

  The image file must be 16x16 pixels in size. If this field is left blank, a default STE icon is used (~/AsiCommon/icon_con_usercontrol.gif).

  URL to the configuration help page

  Specifies a relative URL from the root (~) of the physical path for the IIS application or IIS website that hosts your iMIS content management websites to the Configuration Help for the iPart associated with this content type. This Help page displays when you click the link when configuring an iPart. By default, the root corresponds to C:\Program Files\ASI\iMIS\Net. For example, ~/iparts/Common/QueryMenu/QueryMenuHelp.htm.

  The visual look and feel of the Help page is based on the iMIS theme you have selected. To be consistent with the rest of iMIS, we recommend that you only use basic HTML and allow iMIS to style the page. However, if needed, you can tailor the page using internal CSS.

Defining content authority groups

Do the following to define content authority groups (CAG).

Go to RiSE > Maintenance > Content Authority Groups:

1. Click select for an existing content authority group to modify its properties. You can also add or delete a content authority group:

- Click add to add a new content authority group:

1. Enter a Group Name for the new content authority group.
2. Select MasterAdmin if applicable.
3. You can also select to Copy an existing iMIS Group.

- Click delete to delete an existing content authority group.

2. Expand the Group Membership section to add new group members. Once members have been added, you can edit content authority group permissions for each member.

   When defining a content authority group, you can designate that it is a Master Admin content authority group. This assigns all members of this content authority group to the Content Administrator Document System security role, which gives all members of this content authority group full Document System permissions to all iMIS content management definition objects in the system. This is useful when you want to ensure that members of this content authority group are never limited in any way by the Access Control settings of iMIS content management definition objects.

   Creating content authority groups based on iMIS security groups

   To enable the people who perform web content authoring to view and define content folders and content records, you must grant Document System Read, Edit, and Delete permissions to these people in the Access Settings section of every content folder definition. It can be too permissive to grant these permissions to the security role Everyone, and it can be too tedious to add every person as an individual user just so you can grant them the appropriate permissions.

   A much easier method is to define content authority groups that are based on your preexisting iMIS security groups, with each content authority group having the same members as the corresponding security group. Then, when defining content folders, you can assign the content authority group in the Workflow Management section, and in the Access

Settings section you can grant Document System Read, Edit, or Delete permissions as needed to the corresponding security group, or Full Control permissions to confer Read, Edit, and Delete permissions.

Create a content authority group that is based on an iMIS security group.

Go to RiSE > Maintenance > Content Authority Groups:

1. Click add to add a new content authority group.
2. Select Copy an existing iMIS Group.
3. Click select.
4. Find the name of the iMIS security group you want to copy.
5. Click the name of the iMIS security group.
6. Click Save.

This creates a content authority group that has the following:

- The same name as the selected iMIS security group, followed by CAG.
- The same members as the selected iMIS security group, which are copied at the time of creation. If additional members are later added to the security group, they are not automatically added to the content authority group.
- One of the members has Content Editor and Default Owner content authority group permissions assigned by default. All other members have no content authority group permissions at all. You must edit the permissions for each member.

Note: After you create a content authority group in this manner, the content authority group and the original iMIS security group do not automatically stay in sync. They are two different groups at this point and each must be updated separately.

Troubleshooting

- You must be a member of at least one Master Admin content authority group.
- You must have planned the content authoring workflow that you want for your organization.
- Optionally, you should have a list, prepared with the assistance of the person who performs iMIS administration, of the standard iMIS security groups for which you want to create corresponding content authority groups.

Managing the content block iPart's security using content authority groups

Runtime access to the Content Block iPart is controlled using permissions in Content Authority Groups. Only users with administrative access or the Content Editor permission can add content or posts, or a child, if applicable. Authenticated users without the Content Editor permission can reply to posts if replies are enabled, as well as edit or delete their own replies.

Giving a user content editor permissions

Go to RiSE > Maintenance > Content Authority Groups:

1. Click select for an existing content authority group to modify its properties. You can also click add to add a content authority group. In the Select New Group Members area, add the new user to the content authority group if they are not already a member:

1. Select Last Name in the Select a Query drop-down.
2. Find the new user based on their last name.
3. Click Add for the new user you want to add. The user is added to the content authority group.

   The Content Editor Permission can be added to a user in any content authority group.
2. In the Current Group Members area, click edit permissions next to the user’s name.
3. Select the Content Editor checkbox. No other permissions are required to use Content Block, nor will additional permissions impact the use of Content Block.
4. Click Update to update the permissions.

5. Click Save to update the content authority group. The next time the user logs in to iMIS and navigates to a page containing a Content Block, they will see options to Add, Edit, and Delete HTML Posts and Child Posts, if enabled.

   Note: This permission also gives the user Surf-to-Edit permissions which can be used to edit the iPart configuration in iMIS content management. Editing content using Content Block or using iMIS content management is considered comparable from a security stand point. Also, System Administrators have full access regardless of any content authority group permissions.

   Adding a reply or editing an existing reply

   Authenticated Users, such as logged-in users, are allowed to create replies to posts if this function is enabled in the iPart configuration. These users can also edit and delete their own replies, but not those of other users. System Administrators and Content Editors have full edit access to all replies.

   Reading content block posts

   All users are allowed read access to the Content Block iPart. However, all other iMIS security still applies. Pages containing a Content Block can still be public or secure just like any other page on your website.

   Concept: content authority groups (CAGs) and content authoring workflow

   A content authority group (CAG) is a special type of iMIS security group whose members have permissions that are specific only to iMIS content management functionality. Content authority groups are also used to enable content authoring workflow.

   content authority group permissions

   Content authority group permissions are specified for each member of a content authority group. These permissions determine whether that member can create, edit, publish, and delete navigation items, content records, and content folders. They also determine whether that member can define content layouts, upload graphics for use in Content Html iParts, and upload files when defining a ContentFile iPart.

Content authority group permissions are globally applied throughout iMIS content management. For example, if a specific iMIS user is granted permission to edit content records in any content authority group to which they belong, then that user has global permission to edit content records in any content folder.

Content authority groups can be designated as a Master Admin content authority group. Members of a Master Admin content authority group are automatically assigned to a special iMIS Content Administrator security role. iMIS users who belong to the Content Administrator role always have full Document System security permissions for all iMIS content management definition objects in the system.

Content authoring workflow

Content authoring workflow is enabled for a content folder by assigning a content authority group to the content folder. All content records created in that content folder will subsequently progress through the workflow that is defined by the permissions assigned to each member of the content authority group.

When new sub-folders are created, the content authority group assigned to the parent folder is copied into the definition of the new sub-folder by default (thus inheriting the parent folder's workflow), but any content authority group member with Folder Editor permissions can change or remove the assigned content authority group of the new sub-folder.

Content authoring workflow revolves around messages that appear in the Content Designer Task List for every person who is a member of at least one content authority group. Any person with access to Content Management can view anyone's Content Designer Task List. The Content Designer Task List is divided into the following categories:

- Content you are working on – Content records that you were the last person to define and save, and which are still in a Working state, are listed here. It does not matter whether you are a member of the content authority group assigned to the content record's parent content folder, or whether the parent content folder has a content authority group assigned to it.

- Content awaiting your approval – People who do not have Content Approver content authority group permissions cannot publish content records. Instead of seeing a Publish command, they see a Submit for Approval command, which submits a content publishing request. These content publishing requests are listed here for all people that have Content Approver content authority group permissions in at least one content authority group to which they belong. It does not matter whether you are a member of the content authority group assigned to the content record's parent content folder, or whether the parent content folder has a content authority group assigned to it.
- Content deletion requests – People who do not have Content Approver content authority group permissions cannot delete content records. They see the Organize > Delete command, but using it does not actually delete the content record from its parent content folder. Instead, this action submits a content deletion request. These content deletion requests are listed here for all people that have Content Approver content authority group permissions in at least one content authority group to which they belong. It does not matter whether you are a member of the content authority group assigned to the content record's parent content folder, or whether the parent content folder has a content authority group assigned to it.
- Content that has expired or will soon expire – If you are the assigned content owner for a content record that is defined to have an expiration date, expiration notices for that content record are listed here when that date approaches, when the date actually occurs, and at defined intervals after the date has passed. For more information, see Fields: setup – workflow.
- Content change requests assigned to you – When people who do not have Content Editor content authority group permissions use the Surf-to-Edit feature of iMIS content management to edit an iPart or content record on a rendered web page, they see a content change request form instead of the content record editor or iPart editor. Such content change requests on content records for which you are the assigned content owner are listed here.

  Note: The person who creates a new content record is automatically assigned as the content owner for that content record (this assignment can be manually changed after

creation). It does not matter who the content owner assigned to the parent content folder might be.

Caution! A content record does not have a content owner automatically assigned if it was created by a person who is a member of the SysAdmin role, but who does not have Content Editor content authority group permissions in at least one content authority group.

- Unassigned content change requests – Similar to the preceding bullet, except that content change requests for content records that have no specified content owner are listed here in the Content Designer Task List of every person who has Content Editor content authority group permissions in at least one content authority group to which they belong.

  Note: You must be a Full user and you must belong to at least one content authority group to see the Content Management tab. Casual and Public users who are members of a content authority group cannot see the Content Management tab, but they can interact with content records by using the Surf-to-Edit feature.

  Concept: content authority group permissions versus Document System permissions
  Content authority group (CAG) permissions are specified for each member of a content authority group in the definition of each content authority group. Document System security permissions are defined in the Access Settings section in the definition of most iMIS content management definition objects.

  Both types of permissions affect your ability to view and define iMIS content management definition objects. The interaction between these two different sets of permissions enables some sophisticated structuring of security access and content authoring workflow.

- Document System Read permissions for iMIS content management definition objects such as a content record or a navigation item determine not only which iMIS users can view the properties of that definition object within Content Management, but also determine who can see the rendered version of that object on a website.

  For example, if a content record is assigned to the system role Everyone with Read permissions, then even anonymous visitors to an iMIS content management website will be able to view that content record's rendered web page. However, if only a specific security

group such as "Board Members" is given Read permissions for that content record, then only members of that security group who have logged on to the iMIS content management website will be able to view that content record's rendered page. If they do not log on to the website with their iMIS logon name, they are treated as anonymous users and unable to view the rendered page.

- Document System Edit permissions are required to edit the properties of iMIS content management definition objects and Delete permissions are required to delete iMIS content management definition objects. However, these permissions are not sufficient by themselves. You must also have the corresponding content authority group permissions. For example:
- If you have Document System Read and Edit permissions on a content record but you do not also have the content authority group Content Editor permission, then when you attempt to view the properties of that content record, you will see only a rendered preview of that content record. You might want a mixture of permissions like this, plus the content authority group Content Approver permission, for the staff in your content authoring workflow who you want to give the ability to approve or reject content, but not the ability to create or revise content.
- If you have Document System Read, Edit, and Delete permissions on a content record and you have the content authority group Content Editor permission, then you will be able to view and edit the properties of that content record, but you will not be able to delete that content record. If you also have the content authority group Content Approver permission, then you will also be able to delete that content record.

Configuration options: content authority groups

These fields control the properties of content authority groups (CAGs) that are defined in the system.

Go to RiSE > Maintenance > Content Authority Groups:

You can click add to add a new content authority group, or select an existing content authority group.

Master Admin (Is Master Admin)

Assigns all members of this content authority group to the Content Administrator Document System security role, which gives the members full Document System permissions to all iMIS content management definition objects in the system. This is useful when you want to ensure that members of this content authority group are never limited in any way by the Access Control settings of iMIS content management definition objects.

Copy an existing iMIS Group

(displayed only when you click add from the main list of defined content authority groups)

Creates a content authority group that is based on an existing iMIS security group that you choose when you click select. This content authority group:

- Has the same name as the selected iMIS security group, followed by CAG.
- Has the same members as the selected iMIS security group (copied at the time of creation. If additional members are later added to the security group, they are not automatically added to the content authority group).
- One of the members has Content Editor and Default Owner content authority group permissions assigned by default. All other members have no content authority group permissions at all. You must edit the permissions for each member.

edit permissions

(displayed only after at least one member has already been added to the content authority group)

Note: The following content authority group permissions are additive with the standard Document System permissions used for all iMIS definition objects. For example, even if you have Content Editor content authority group permissions, you will not be permitted to edit the properties of a specific content record unless you also have Read and Edit Document System permissions on that content record. And even if you have Content Approver content authority group permissions, you are not permitted to delete content records unless you also have Delete Document System permissions on each content record.

- Content Editor – Grants the ability to create new content records and edit the properties of existing content records. Also enables you to be designated as the content owner of a content folder or content record. The following workflow events appear in your Content Designer Task List:
- Content record expiration notices
- Content record change requests

  Clear this checkbox to revoke these permissions and prevent these workflow event notifications.

  Note: If you do not also have Content Approver content authority group permissions, you will not be able to publish or delete content records. Instead of a Publish command on the toolbar, you will see only a Submit command, which notifies every person with Content Approver content authority group permissions that you have requested to publish the content record. Likewise, although you'll see a Delete command, the content record is not actually deleted. Instead, all content approvers receive notice that you have requested to delete the content record.
- Default Owner – Designates a single member of the content authority group as the default content owner to automatically assign to a content folder or content record if the current content owner becomes ineligible for any reason. For example, if you change the content authority group assigned to a content folder and the previous content owner does not have Content Editor content authority group permissions in the newly assigned content authority group (or isn't even a member of the new content authority group), then the Default Owner of the newly assigned content authority group is automatically assigned by the system as the new content owner for the content folder.
- When you define a new content authority group, the first member that you add to the content authority group is automatically assigned both Default Owner and Content Editor content authority group permissions.
- You cannot remove Default Owner permissions from a content authority group member. Instead, you must assign Default Owner permissions to a different member (which also

automatically assigns Content Editor permissions to that member if they do not already have them).

Note: For content folders that have a content authority group (CAG) assigned to them, the Owner of this content value is not copied to new content records that are created inside of it. Instead, content records automatically have this value set to specify the first person who created the content record, which you can subsequently change as needed.

Caution! A content record does not have a content owner automatically assigned if it was created by a person who is a member of the SysAdmin role, but who does not have Content Editor content authority group permissions in at least one content authority group.

- Content Upload – Grants the ability to upload images for use in Content Html iParts and to upload other types of files for use in ContentFile iParts. Clear this checkbox to revoke these permissions.
- Content Approver – Grants the ability to approve content records that have been submitted for publishing or for deletion. The following workflow events appear in your Content Designer Task List. By default, publishing requests are also emailed to you, but the person who performs iMIS content management implementation can disable these emails in RiSE > Set up content management > Content designer configuration.
- Content record publishing requests
- Content record deletion requests

  Clear this checkbox to revoke these permissions and prevent these workflow event notifications.
- Folder Creator – Grants the ability to create new and edit existing content folders. Clear this checkbox to revoke these permissions.
- Folder Editor – Grants the ability to edit the properties of existing content folders. Clear this checkbox to revoke these permissions.
- Navigation Creator – Grants the ability to create new and edit existing navigation items. Clear this checkbox to revoke these permissions.

- Navigation Editor – Grants the ability to edit the properties of existing navigation items. Clear this checkbox to revoke these permissions.
- Layout Editor – Grants the ability to create new content layouts and edit the properties of existing content layouts. Clear this checkbox to revoke these permissions.

Implementing iMIS Sites

Getting started: iMIS content management implementation

iMIS content management implementation is the process of installing iMIS content management, configuring the global infrastructure for your iMIS content management environment, and performing the initial implementation of iMIS sites so that they can be subsequently managed and populated by day-to-day iMIS content management users. iMIS content management implementation comprises the following activities:

- Installing and configuring iMIS content management on each web server that is used for hosting iMIS sites.
- Implementing iMIS sites, including the optional migration of legacy content (such as e-Content Manager 5.x sites) into the iMIS content management environment.

  Note: iMIS content management implementation involves technical decisions and possibly ASP.NET coding that should be performed by staff or consultants who are familiar with server administration and ASP.NET development techniques.

  Who depends on this?

  Your iMIS content management implementation tasks must be completed before the people who perform site management can define the appearance and navigation structure of iMIS sites, and can define the infrastructure for the web content authoring environment.

  What must be done before you can start?

  You cannot perform iMIS content management implementation tasks until after you have planned the specifics of your iMIS content management implementation with the assistance of the various people who design, manage, and author content for your organization's sites.

  Putting it all together

iMIS content management implementation comprises two general workflows:

- Installation and configuration entails the following actions:
- Installing iMIS content management on web servers.
- Defining publishing servers for each installed instance of iMIS content management, to control publishing to the iMIS sites hosted by that instance.
- Scheduling content authoring workflow updates on your production application server to enable iMIS to process content expiration notices and the removal of expired content.
- Granting security access to iMIS content management features.
- Defining global iMIS content management properties.
- (optional) Viewing publishing server error logs to troubleshoot publishing issues.

- Website implementation entails the following actions:
- Defining iMIS sites.
- (optional) Adjusting the site keep-alive service.
- (optional) Integrating hand-built master pages and themes with iMIS content management to enable your custom web design to be used when defining iMIS sites.
- (optional) Defining custom iParts as content types to expand the selection of iParts available to the people who perform web content authoring.
- (optional) Defining navigation areas and breadcrumb areas for use in your master pages.
- (optional) Extending the default search behavior to match your web design guidelines.
- (optional) Extending the default content and index renderers to modify how content records and iParts are rendered for browser display and indexed by the search engine.

  Location of the tools

  You can find the tools in the following places:

- RiSE Tools (administrative and staff views)
- Content Management (staff views)

  The functionality of each tool is the same in all places.

  More

- Developer articles on iMISCommunity
- Microsoft Developer Network

iMIS content management installation and configuration

Configuration involves installing iMIS content management on web servers and enabling support for iMIS content management both in iMIS and in Internet Information Services (IIS) on every server that you use for hosting iMIS sites.

Required tasks

You must perform these configuration tasks before you use iMIS content management for production work. All three tasks are performed in iMIS:

1. Scheduling content authoring workflow updates
2. Granting security access to iMIS content management features
3. Defining global iMIS content management properties

   You must install iMIS content management on one or more external web servers if you want to avoid using your iMIS application server to host public-facing sites. If you are creating only intranet sites for use inside your local network, you can use your production iMIS application server for this purpose. There is no need to install iMIS content management on any servers in this case, because your iMIS application server already contains everything needed to host iMIS sites.

If you do install iMIS content management on one or more web servers, you must also perform Defining publishing servers to connect iMIS to the publishing service on each web server.

When you install iMIS content management on a 64-bit configuration, you must define the publishing server to use the required Program Files (x86) path. See Fields: publishing servers.

Installing iMIS content management on web servers

To install iMIS content management on web servers

Note: Do not perform this procedure on your production iMIS application server if you installed it using the Complete option of the iMIS Installer, because the supporting code for iMIS content management is already installed. Only perform this procedure on standalone web servers that are used for hosting iMIS sites.

Note: The term web server refers to any server that hosts iMIS sites, whether it is inside your network firewall (for private intranet sites) or outside your network firewall (for public-facing sites).

Run the iMIS installer on each web server and use the Custom installation option to install only the iMIS content management component. This installs only the code needed to support iMIS sites and enable them to interact securely with your iMIS database. It also installs the publishing service used for publishing new content to the iMIS sites on this web server, defines a corresponding publishing server in the iMIS database, and it sets up a dedicated IIS application in the IIS Default Web Site, to use for hosting iMIS sites.

During the installation, be aware of the following important considerations:

- Be sure to configure your networks and servers to run efficiently. See Best Practices for additional information.
- You are given an opportunity to change the default name WCM for the IIS application that will host your iMIS sites. You would do this if you prefer that the URLs to each of your iMIS sites contain a different application segment other than /wcm/, for example, http://www.myorg.org/usa/mywebsite/ instead of the default

http://www.myorg.org/wcm/mywebsite/. Whether you rename the application or leave it at the default value, you must communicate the URL that resolves to this new application to the people who define your iMIS sites, because they must specify this URL in the URL(s) pointing to the IIS website root when defining sites.

- The standard installation of iMIS content management is designed to enable the installed IIS application to host multiple iMIS sites with a minimum of required hard drive space. If you prefer to simplify the URLs for your iMIS sites by using one IIS application per iMIS site or even by using one IIS website per iMIS site, you can do so only after you have completed the standard installation of iMIS content management. The process requires some manual steps described below in the Tips section, and requires roughly 1.6GB of additional disk space per each additional IIS application or IIS website.
- When prompted to specify a Publishing Server Code, you must specify a new value that is unique among all your iMIS application servers and iMIS content management web servers. Do not accept the default value of A because this was probably already used when your iMIS application server was installed.

  Note: On iMIS application servers that were installed with the Complete option, or that were Custom-installed with both the iMIS content management component and the iMIS application component, the iMIS application hosts the staff views of iMIS and all of your iMIS sites, which means that the URLs to the iMIS sites hosted on your iMIS application server all contain an /imis/ segment, for example, http://www.myorg.org/imis/mywebsite. The Tips section below describes some methods you can use to manually create one or more IIS applications or even IIS websites specifically for hosting your iMIS sites so that their URLs do not contain an /imis/ segment.

  Troubleshooting

- The web server must have a supported version of Internet Information Services (IIS), and you must have prepared the web server as described in Preparing all servers and workstations (Installation Guide).
- You must have administrative access to IIS and the entire file system on both the web

server and on your iMIS application server, because in some scenarios you might need to manually copy some files that are located on your iMIS application server.

Tips

The following information can be helpful when installing iMIS content management on web servers.

Where should you host iMIS sites?

If you installed your production iMIS application server using the Complete installation option, the application server has all the components needed to host iMIS sites. It is safe to use your iMIS application server to host private intranet sites for your organization. However, it is not recommended to use your iMIS application server for hosting your public-facing sites because doing so would expose the iMIS application to web clients outside your network firewall, which can pose security risks. Typically, you should instead host your public-facing iMIS websites on external web servers that are located outside your network firewall, and you should install only the iMIS code needed for iMIS websites to run on those external web servers.

Note: For iMIS release 15.2.1 through 15.2.10, a full install of iMIS is required.

If your organization has a broad geographical presence, you might choose to use multiple external web servers in different geographic locations to provide load-balancing and improve geographic latency, as well as to provide different content for each geographic region.

Controlling which servers actually host a site

The definition of an iMIS site, its sitemap and navigation items, and its content records exist in the iMIS database, and the site's graphics and files for download all exist in the file system of your production iMIS application server. The publishing mechanism of iMIS content management renders all this source content into the various files that IIS needs to host the site, and then places these files on each server that you specify should actually host the site.

You control which servers in your environment actually host the site through the URL(s) pointing to the IIS website root field in the site's definition. Each URL listed in this field must resolve to an IIS application or IIS website on a server where you have installed iMIS content management.

For example, if you want to host a site on both your production iMIS application server and an external webserver, the two URLs you would enter in this field would look like the following: http://myimisappserver/imis/, http://www.myorg.org/wcm/. If the defined URL Name of this Website is mysite, then entering http://myimisappserver/imis/mysite in a web browser would view the site as hosted by your production iMIS application server, and entering http://www.myorg.org/wcm/mysite in a web browser would view the same site as hosted by your external web server.

To ensure that content for the site is rendered and copied to each server that hosts the site, the two halves of the publishing mechanism for each server must be correctly defined with a unique Publish Server Code. This is automatically configured by the iMIS installer if you specified a unique code for each server during installation, but because the iMIS installer defaults to a value of A for this code, you can inadvertently end up with duplicate Publish Server Codes in your production environment. The task Defining publishing servers explains how to correct this situation.

Assuming that the publishing mechanism is correctly defined for each of the servers that are hosting the site, all that's left in our example scenario is to specify the A and B codes (or the value All) that correspond to these publishing servers in the Publish on Servers field. This field is found in the definition of each content folder that contains the content records whose rendered output we want to have available to the site on each server. When you publish a content record, it is this field in the parent content folder that determines which publishing services should process the new content record and place its rendered output in the file system on their server. This enables the site's navigation items to find the rendered versions of their corresponding content records in the local file system of each server.

Manually creating additional IIS applications for your iMIS sites

Caution! The techniques described in this section can give you more control over the URLs that point to your iMIS sites, but this requires increased disk space requirements and increased maintenance overhead. These techniques involve manually creating additional copies of the Net folder that contains all the iMIS code that supports iMIS sites (roughly 1.6 GB of disk space required per copy). These additional copies cannot be detected by the iMIS Installer for software upgrades. Therefore, after every iMIS upgrade that you install, you must manually copy all files that were changed by the upgrade from the originally installed Net folder (and in all of its sub-folders) into the additional instances of the Net folder.

Note: If you use the techniques in this section to create additional IIS applications for hosting your iMIS sites, be sure to communicate the corresponding new URLs to those who define your iMIS sites, because they must specify these URLs in the URL(s) pointing to the IIS website root when defining sites.

In the preceding section, the iMIS Installer created a single IIS application for hosting all of your iMIS sites on the web server. You can alternatively use more than one IIS application for hosting your iMIS sites. To understand the potential benefits of doing this, let's examine how the URLs for your iMIS sites look when you use only one application to host all of them.

Assume that your organization's domain name is www.myorg.org, and that when you used the iMIS installer to install the iMIS content management component on a web server, you used the default name of iMIS content management for the IIS application that will host your iMIS sites. You next defined two iMIS sites: one whose URL name of this website is USA, and the other whose URL Name of this website is EUROPE. For both of these sites, you specified http://www.myorg.org/wcm/ as their URL(s) pointing to the IIS website root. Finally, since both sites are hosted by the same IIS application, you specified the USA site to be the default site for this IIS application by selecting the Make this website the default checkbox.

In this scenario, the URLs that would resolve to each site are:

- http://www.myorg.org/wcm/ - the USA site
- http://www.myorg.org/wcm/usa/ - the USA site
- http://www.myorg.org/wcm/europe/ - the EUROPE site

  Note: Regarding the first http://www.myorg.org/wcm/ URL in this scenario, the moment that you navigate away from the home page, the URLs will start showing the full URL, including the segment for the IIS application name, for subsequent pages: http://www.myorg.org/wcm/usa/[theRestOfTheURL].

  You might decide that this dynamic URL rewriting behavior for several iMIS sites that are hosted by the same IIS application results in URLs that are too long or otherwise confusing to remember. In this case, you could simplify the URLs for your sites by manually creating a separate IIS application for each iMIS site. This removes the need to specify the extra URL segment that identifies the URL Name of this website.

  The following process describes how to set up one such additional application. You must repeat this process for each application you add to the IIS Default Web Site:

1. On the application server or web server where you are creating the additional IIS application, you must first create a new copy of the Net folder that contains all the ASP.NET code used by iMIS.

   It doesn't matter where you put this copy of the Net folder, but your changes can be predictable to other administrators if you put each copy in a folder at the same level as your iMIS folder. So for example, you could create a new folder in C:\Program Files\ASI called WCM Sites, and then copy the entire Net folder (located by default in C:\Program Files\ASI\iMIS) into the WCM Sites folder, resulting in C:\Program Files\ASI\WCM Sites\Net. You still have your original C:\Program Files\ASI\iMIS\Net folder as well. This file path to the new copy of the Net folder is what you must specify as the Physical Path to the new IIS application in the next step.
2. In IIS on this server, add the new application directly beneath the Default Web Site, specifying an Alias that makes sense in the context of a root URL that points to your organization's sites.

The Physical path must be the full path to the copy of the Net folder that you created in the previous step. The corresponding path credentials must be set to connect as the application user (pass-through authentication). If you are using IIS7 and later, you must also select the iMISApp AppPool to ensure that you are using the Integrated pipeline mode and sharing the same application pool as the other iMIS-related applications on the server.

3. In IIS on this server, the 404 redirect for the new application incorrectly points to the 404.aspx file in the root of the physical path for the application that was originally installed by the iMIS Installer (the original Net folder). For example, if you installed the full iMIS application as part of a Complete iMIS installation, the path for the 404 redirect specifies /iMIS/404.aspx (where iMIS represents the application name in IIS). You must replace this application name segment with the new application name, so that IIS will look in the physical path for your new application for the custom 404.aspx file.

   In IIS, open the Error Pages settings for the new website and edit the 404 entry to Execute a URL on this site, with the URL specified as /[applicationName]/404.aspx. For example, if you named this new application with the alias USA, then this URL would be specified as /usa/404.aspx.

4. On this server, open a command prompt window and run the following command to create a new instance of the publishing service to control publishing of content to this new physical path for the IIS application:

   %WINDIR%\Microsoft.NET\Framework\v4.0.30319\InstallUtil.exe /ServiceName=[AsiPublishing15Secondary][file path to copied Net\bin folder]\PublishService.exe

- The path to the InstallUtil.exe utility provided with the ASP.NET framework assumes that you have installed the framework in the default location.
- The [AsiPublishing15Secondary] string should be replaced by the specific name that you want to give to each additional instance of the publishing service.
- The [file path to copied Net\bin folder] string should be the absolute path to the bin folder in the new copy of the Net folder that you created in Step 1. For example, C:\Program File\ASI\WCM Sites\Net\bin.

5. Manually modify the Publish Server Code of this new instance of the publishing service to be unique among all publishing services in your environment, as described in Defining publishing servers. When you define a new publishing server, the Frequency and Publishing Speed values default to zero. You should set them to Frequency=10 and Publishing Speed=100.
6. Modify the configuration file for this new instance of the publishing service to listen on a different port than the one used by the default instance:

- In the new copy of the Net folder that you created in step 1, edit the file ..\bin\PublishService.exe.config.
- Locate the following element and change the port value to some unused port number in your environment:

  <channel ref="tpc" port="15151">

7. Modify the search configuration file for this new application to communicate with the same port number that you specified for the new instance of the publishing service.

- In the new copy of the Net folder that you created in Step 1, edit the file SearchRemoting.config.
- Locate the following element and change the port segment of the url value to the same port number that you specified in Step 6.

  <client url="tcp://localhost:15151">

8. In the Maintenance section of iMIS content management, define a new publishing server to control the publishing service, as described in Defining publishing servers.

   Assume that you have used this process to create two additional IIS applications: one with the alias USA, and the other with the alias EUROPE. Your two sites still have the same URL names as in the previous scenario (still USA and EUROPE), but the URL names won't matter because they are used only to differentiate among multiple sites when they share the same IIS site root. What's different in this scenario is that the USA site specifies http://www.myorg.org/USA/ as its URL(s) pointing to the IIS website root,

and the EUROPE site specifies http://www.myorg.org/EUROPE/ as its URL(s) pointing to the IIS website root.

In this scenario, the URLs that resolve to each site would be:

- http://www.myorg.org/usa/ - the USA site
- http://www.myorg.org/europe/ - the EUROPE site

The following two URLs would also work but they are longer and contain redundancy, so there's no need to communicate these to your members or the general public. The last segment, which specifies the URL name of this website, is not needed by iMIS content management to determine which site to display.

- http://www.myorg.org/usa/usa - the USA site
- http://www.myorg.org/europe/europe - the EUROPE site

Caution! If the structure of your added IIS applications results in a situation where you have one IIS application that hosts iMIS sites nested inside of another IIS application that also hosts iMIS sites, you must remove some elements from their respective web.config files in all but the top-most application in this nested hierarchy. Remove the <system.webserver> element. If its parent <location> element is subsequently empty (contains no other elements), then remove the <location> element as well.

Hosting sites as an IIS website instead of as an IIS application

Caution! The techniques described in this section can give you more control over the URLs that point to your iMIS sites, but this requires increased disk space requirements and increased maintenance overhead. These techniques involve manually creating additional copies of the Net folder that contains all the iMIS code that supports iMIS sites (roughly 1.6 GB of disk space required per copy). These additional copies cannot be detected by the iMIS Installer for software upgrades. Therefore, after every iMIS upgrade that you install, you must manually copy all files that were changed by the upgrade from the originally installed Net folder (and in all of its sub-folders) into the additional instances of the Net folder.

Note: If you use the techniques in this section to create additional IIS websites for hosting your iMIS sites, be sure to communicate the corresponding new URLs to those who define your iMIS sites, because they must specify these URLs in the URL(s) pointing to the IIS website root when defining sites.

If you prefer to host an iMIS site at the level of an IIS website instead of at the level of an IIS application, it is possible to do this by using a process that is very similar to that described in the preceding section. This technique enables you to create an even shorter URL for an iMIS site, such as http://www.myorgusa.org/ instead of http://www.my-org.org/usa/.

You must repeat this process for each IIS website you create:

1. Create a new copy of the Net folder that contains all the ASP.NET code used by iMIS on the application server or web server where you are creating the additional IIS website.

   It does not matter where you put this copy of the Net folder, but your changes can be predictable to other administrators if you put each copy in a folder at the same level as your iMIS folder. So for example, you could create a new folder in C:\Program Files\ASI called WCM Sites, and then copy the entire Net folder (located by default in C:\Program Files\ASI\iMIS) into the WCM Sites folder, resulting in C:\Program Files\ASI\WCM Sites\Net. And you still have your original C:\Program Files\ASI\iMIS\Net folder as well. This file path to the new copy of the Net folder is what you must specify as the Physical Path to the new IIS website in the next step.

2. Add the new website In IIS on this server, specifying the Physical path as the full path to the copy of the Net folder that you created in the previous step.

   The corresponding path credentials must be set to connect as the application user (pass-through authentication). If you are using IIS7 and later, you must also select the iMISApp AppPool to ensure that you are using the Integrated pipeline mode and sharing the same application pool as the other iMIS-related applications on the server.

3. In IIS on this server, the 404 redirect for the new website incorrectly points to the 404.aspx file in the root of the physical path for the application that was originally installed by the iMIS Installer (the original Net folder). For example, if you installed the full iMIS

application as part of a Complete iMIS installation, the path for the 404 redirect specifies /iMIS/404.aspx (where iMIS represents the application name in IIS). You must remove this application name segment from the path so that IIS will look in the physical path for your new website for the custom 404.aspx file. In IIS, open the Error Pages settings for the new website and edit the 404 entry to Execute a URL on this site, with the URL specified as /404.aspx.

4. On this server, open a command prompt window and run the following command to create a new instance of the publishing service to control publishing of content to this new physical path for the IIS website:

   %WINDIR%\Microsoft.NET\Framework\v4.0.30319\InstallUtil.exe /ServiceName=[AsiPublishing15Secondary][file path to copied Net\bin folder]\PublishService.exe

   - The path to the InstallUtil.exe utility provided with the ASP.NET framework assumes that you have installed the framework in the default location.
   - The [AsiPublishing15Secondary] string should be replaced by the specific name that you want to give to each additional instance of the publishing service.
   - The [file path to copied Net\bin folder] string should be the absolute path to the bin folder in the new copy of the Net folder that you created in Step 1. For example, C:\Program File\ASI\WCM Sites\Net\bin.

5. Manually modify the Publish Server Code of this new instance of the publishing service to be unique among all publishing services in your environment, as described in Defining publishing servers.

6. Modify the configuration file for this new instance of the publishing service to listen on a different port than the one used by the default instance.

   - In the new copy of the Net folder that you created in Step 1, edit the file ..\bin\PublishService.exe.config.
   - Locate the following element and change the port value to some unused port number in your environment.

     <channel ref="tpc" port="15151">

7. Modify the search configuration file for this new IIS website to communicate with the same port number that you specified for the new instance of the publishing service.

- In the new copy of the Net folder that you created in step 1, edit the file SearchRemoting.config.
- Locate the following element and change the port segment of the url value to the same port number that you specified in Step 6.

  <client url="tcp://localhost:15151">

  Go to RiSE > Maintenance > Publishing servers:

8. Define a new publishing server to control the publishing service, as described in Defining publishing servers.

   Caution! If the structure of your added IIS websites results in a situation where you have one IIS application that hosts iMIS sites or iMIS applications nested inside of an IIS website that also hosts iMIS sites, you must remove some elements from their respective web.config files in all but the top-most IIS website in this nested hierarchy. For example, this situation could occur if you configure the IIS Default Web Site on your production iMIS application server to host some intranet iMIS sites, because the iMIS application is one of the applications located in the IIS Default Web Site. Remove the <system.webserver> element. If its parent <location> element is subsequently empty (contains no other elements), then remove the <location> element as well.

   Dynamic URL rewriting

   The scenarios described in the preceding two sections illustrate the way that iMIS content management performs dynamic URL rewriting.

   To choose which files to serve up to a requesting web browser, the iMIS content management code located in the physical path of the IIS application or IIS website matches the requested URL to the URL(s) pointing to the IIS website root property of the various iMIS sites in the system. If there is only one iMIS site defined in the system that uses this requested URL, then the iMIS content management code serves up the home page for that iMIS site to the requesting browser.

However, if the iMIS content management code determines that there are multiple iMIS sites that share the same requested URL in their URL(s) pointing to the IIS website root property, it then parses the following URL segment and matches this value to the URL name of this Website property of the various iMIS sites in the system to determine which site's home page to serve up to the requesting browser.

Defining publishing servers

To define publishing servers

Go to RiSE > Maintenance > Publishing servers:

Select an existing publishing server to change its properties, or you can add or delete a publishing server.

To verify/change a publishing service code

Do the following to verify or change the Publishing Server Code assigned to an installed publishing service:

1. Open the PublishService.exe.config file in a text editor on the appserver or external web server. Default location is C:\Program Files\ASI\iMIS\Net\bin
2. In the <SystemParams> declaration, verify or change the value of the PublishServerCode key. The value must be a single uppercase letter from A to Z, and must be unique among all publishing services used by a given instance (database) of iMIS.

To manually define additional publishing servers

The iMIS installer automatically defines a corresponding publishing server for the default instance of the publishing service installed by iMIS. However, in some iMIS content management installation scenarios, you must manually install one or more additional instances of the publishing service at a command line.

1. Manually create a single corresponding publishing server for every publishing service that you have manually installed.
2. When you add a new publishing server, review the Publish on Servers property for all existing content folders to specify whether the rendered files from content records in

those folders should be made available to the iMIS sites that are associated with these manually-created publishing servers.

To define sets of publishing service codes

When you install iMIS content management on a web server (or install an additional publishing service for each manually created IIS application or IIS website), you are prompted to specify a Publishing Server Code to uniquely identify the publishing service that is created during installation (it always defaults to the value A). When you define a publishing server in the iMIS content management environment to control the behavior of a specific publishing service, you use this code to link the publishing service to its corresponding publishing server.

The Publishing Server Code must be unique among all publishing services used by a given instance of iMIS. For example, your production iMIS server might use the code A to identify its instance of the publishing service, and you might also have three other external web servers located in different geographic locations whose Publishing Server Codes might be B, C, and D, respectively.

Tip: You can duplicate codes across test and production instances, since they're still unique within their specific databases.

Caution! The publishing server associated with the base iMIS installation must always be defined as the only Default (the one PublishServerRef row set with the IsDefault flag). Unless this one instance is set as the default, the Multi-Instance Utility will not work as expected.

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must already have installed iMIS content management on one or more web servers and noted the Publish Server Code that you specified to use for the iMIS publishing service that was installed during that process.

  Note: You must associate no more than one publishing server with each publishing service. If your environment has more than one IIS application or IIS website that is hosting

iMIS sites on a given server, you must install one publishing service for each such IIS application and IIS website, and you must define a single corresponding publishing server for each publishing service. See Installing iMIS content management on web servers.

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

Scheduling content authoring workflow updates

To schedule content authoring workflow updates

Caution! You must perform this task to enable content authoring workflow to function properly.

Some workflow-related actions are initiated directly by users, such as approving a publishing request in your Content Designer Task List. However, the workflow actions related to managing expired content, such as sending expiration notices or removing content that has expired are managed by a program called ContentWorkflow.exe, which must be manually added to the Windows Task Scheduler on your production iMIS application server.

The Task Scheduler is slightly different on each version of Windows, so adapt the following steps as needed:

1. Create a Basic task in the Task Scheduler Library folder.
2. Create a daily Trigger for the task, so that expired content is checked for once per day.
3. For the Action, select to Start a Program and specify ContentWorkflow.exe, which is located by default in C:\Program Files\ASI\iMIS\Net\bin\. Do not specify any optional arguments or a start-in folder.

4. Find the new task that you created in the Task Scheduler Library folder and modify the following properties:

- On the (General tab), select the option that enables the task to be run regardless of whether you are logged on or not.
- On the (Settings tab):
- Select the option that enables the task to be run as soon as possible after a scheduled start is missed, and also:
- Select the option that stops the task if it runs longer than a certain duration and specify a value, such as 2 hours.

  Troubleshooting
- You must have administrative access to the Windows Task Scheduler and the entire file system on your iMIS application server.
- Your user account on the iMIS application server must have Log on as batch job rights.

Granting security access to iMIS content management features

Accessing major features

The following guidelines help define who can access major features in iMIS:

- Full users who are members of at least one CAG can access Site Designer, the Content Designer tool, and the Tagging and Reports features in iMIS content management.
- Full users who are members of at least one Master Admin CAG can access the Maintenance features in iMIS content management.
- SysAdmin users must belong to at least one CAG, with the appropriate CAG permissions, to participate in web content authoring workflow.

  Note: To access the Edit mode tool, users must be logged on and must be a member of at least one content authority group (CAG).

  Accessing the maintenance features of iMIS content management

  Go to RiSE > Maintenance:

Only members of the SysAdmin role and members of a MasterAdmin CAG can use the maintenance features of iMIS content management.

Accessing the content record commands

A Full user needs both the listed CAG permissions and Document System permissions to use the listed Document System toolbar commands when working with content records.

Note: Casual and Public users can also work with content records through Surf-to-Edit, but their access is very limited compared to Full users. At the least, they must be a member of a CAG, which grants them the ability to request changes for a content record when in Edit mode. They can edit a content record when in Surf-to-Edit mode only if they have been granted Content Editor permissions in at least one CAG and they have been granted Edit Document System permissions on the content record that they want to edit.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	Content Approver	Edit AND Delete
Organize > Copy	Content Editor	none
Organize > Paste	Content Editor	Add (on parent content folder)
Organize > Select All	none	none
Organize > Delete (request only)	Content Editor and NOT Content Approver	Edit
Organize > Delete	Content Approver	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	Content Approver	Delete
New > Website Content	Content Editor	Add (on parent content folder)
New > Website Content Folder	Folder Creator	Add

Edit	Content Editor	Edit
Import	Content Editor	Add (on parent content folder)
Export	member of a CAG	none
Versions	Content Editor	Edit
Run	none	none
Submit	Content Editor and NOT Content Approver	Edit
Publish	Content Approver	none
Preview	none	Read
Search	none	none

Accessing the content layout commands

A Full user needs both the listed CAG permissions and Document System permissions to use the listed Document System toolbar commands when working with content layouts. Casual and Public users cannot work with content layouts.

Note: The Add Document System permissions listed in the following table must be set on the parent folder for content layouts. All other listed Document System permissions must be set on the objects within that parent folder by setting the same permissions on the parent folder and selecting the Apply changes to all descendants checkbox. The easy way around all this is to ensure that the people working with content layouts are all members of the SysAdmin role. The ContentLayouts parent folder must be accessed through the Document System, then go to ContentManagement > DefaultSystem.

Note: Access the Recycle Bin through the Document System.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	Layout Editor	Edit AND Delete (on parent folder)
Organize > Copy	Layout Editor	none
Organize > Paste	Layout Editor	Add (on parent folder)

Organize > Select All	none	none
Organize > Delete	Layout Editor	Delete (on parent folder)
Organize > Properties	none	none
Organize > Empty the Recycle Bin	Layout Editor	Delete (on parent folder)
New > Content Layout Definition	Layout Editor	Add (on parent folder)
Edit	Layout Editor	Edit (on parent folder)
Import	Layout Editor	Add (on parent folder)
Export	member of a CAG	none
Versions	Layout Editor	Add (on parent folder)
Search	none	none

Accessing content type commands

A Full user must be either a member of the SysAdmin role or a member of at least one Master Admin CAG to enable use of the listed Document System toolbar commands when working with content types. Casual and Public users cannot work with content types.

Note: The parent folder for content types must be accessed through the Document System, then go to ContentManagement > DefaultSystem.

Note: Access the Recycle Bin through the Document System.

Accessing sitemap (navigation item) commands

A Full user needs both the listed CAG permissions and Document System permissions to enable use of the listed Document System toolbar commands when working with navigation items. Casual and Public users cannot work with navigation items.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	Navigation Creator	Edit AND Delete
Organize > Copy	Navigation Creator	none
Organize > Paste	Navigation Creator	Add (on parent nav-

		igation item)
Organize > Delete	Navigation Creator	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	none	Delete
New > Website Navigation Item	Navigation Creator	Add (on parent navigation item)
Edit	Navigation Creator OR Navigation Editor	Edit
Import	Navigation Creator	Add
Export	member of a CAG	none
Versions	Navigation Creator or Navigation Editor	Edit
Run	none	Read
Publish	Navigation Creator or Navigation Editor	none
Preview	none	Read
Search	none	none

To grant access to tagged list format commands

A Full user needs both the listed CAG permissions and Document System permissions to enable use of the listed Document System toolbar commands when working with tagged list formats. Casual and Public users cannot work with tagged list formats.

Note: The Add Document System permissions listed in the following table must be set on the parent folder for tagged list formats. All other listed Document System permissions must be set on the objects within that parent folder by setting the same permissions on the parent folder and selecting the Apply changes to all descendants checkbox. (The easy way around all this is to ensure that the people working with tagged list formats are all members of the SysAdmin role.) The TaggedListFormats parent folder must be accessed through the Document System, then go to ContentManagement >

DefaultSystem.

Note: Access the Recycle Bin through the Document System.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	none	Edit AND Delete
Organize > Copy	none	Read
Organize > Paste	none	Add (on parent folder)
Organize > Select All	none	none
Organize > Delete	none	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	none	Delete
New > Tagged List Format	none	Add (on parent folder)
Edit	none	Edit
Import	none	Add (on parent folder)
Export	none	Read
Preview	none	Read
Publish	none	Edit
Search	none	none

To grant access to site commands

A Full user needs both the listed CAG permissions and Document System permissions to enable use of the listed Document System toolbar commands when working with iMIS sites.

Note: You can grant Casual and Public users permissions to work with content records, but they can access content records through Surf-to-Edit only.

Toolbar command	CAG permissions	Document System permissions
Organize > Refresh	none	none
Organize > Cut	none	Edit AND Delete

Organize > Copy	none	Read
Organize > Paste	none	Add (on parent folder)
Organize > Delete	none	Delete
Organize > Properties	none	none
Organize > Empty the Recycle Bin	none	Delete
New > Folder	none	Add (on parent folder)
New > Website	none	Add (on parent folder)
Edit	none	Edit
Import	none	Add (on parent folder)
Export	none	Read
Versions	none	Edit
Run	none	Read
Publish	none	Edit
Preview	none	Read
Search	none	none

Troubleshooting

- You must be a member of the SysAdmin role, and you must have authorization level 1 or greater in Sys Mgmt.
- Remember: You can grant Casual and Public users permissions to work with content records, but they can access content records through Surf-to-Edit only.

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

Defining global iMIS content management properties

Go to RiSE > Set up content management:

Review the following setup pages, modifying the default values as desired:

- Quick setup
- Site designer configuration
- Content designer configuration
- Search configuration
- Workflow configuration

  Note: In the Workflow configuration window, be sure to change the default values of the ND.ExpirationEmailFromAddr and CM.ExpirationEmailFromAddr fields to the email address of a person in your organization.

  Troubleshooting

- You must be a member of the iMIS SysAdmin security role.

Viewing publishing server error logs

Go to RiSE > Maintenance > Publishing servers:

Click error log for the publishing server you want to review. You can sort the log by any column. If you delete entries, they are permanently removed from the corresponding log file on the server host where the corresponding publishing service is installed (C:\Program Files\ASI\iMIS\Net\bin\PublishingService.log).

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).

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

Site implementation

Site implementation is the process of performing the initial creation and tailoring of iMIS sites so that they can be subsequently managed and populated by day-to-day iMIS content management users.

Defining iMIS sites

Go to RiSE > Site Designer > Manage websites:

Do one of the following:

- Select New > Website to create a new iMIS site.
- Click Edit to change an existing site.
- Select Organize > Delete to delete a site.

Define the site's Properties, Look and Feel, Navigation Areas, and Access Settings.

When specifying the URL(s) pointing to the IIS website root, you must use the URLs communicated to you by the person who installed iMIS content management on your organization's web servers. This list of URLs defines the specific servers that should host this site.

After saving the site definition, the site is in a Working state. Ensure that the site is selected, and then from the toolbar click Publish to promote the changes to all associated servers that host this site. When presented with publishing options, you must select the Publish children as well checkbox to ensure that the site's corresponding sitemap and content folder are published as well. Both the sitemap and the content folder have the same name as the site.

If the corresponding sitemap and content folder are empty, you must define at least one navigation item in the site's sitemap and a corresponding content record in the site's content folder before you can preview the site with a web browser, because at this point the site is effectively empty. You must also designate at least one of these initial navigation items as the default web page and Home link for this site, by selecting the This navigation

item is the Home link for the sitemap checkbox in the Options section of the navigation item's definition.

Note: If you attempt to preview the site before creating a navigation item (and corresponding content record) to be the default web page for the site, IIS will display an error message because the master page is expecting a default web page but none exists yet.

To copy theme files to other server hosts

If your site is being hosted by multiple servers (you specified more than one URL in the URL(s) pointing to the IIS website root field), you must manually copy these template files to the other servers that are hosting the site.

Copy the following files from their location relative to the root of the physical path associated with the iMIS application on the iMIS application server to which you were connected (through the staff view of iMIS) when you created the new site. On all the other iMIS content management web servers, place these copied files in the same location relative to the root of the physical path of the IIS applications and IIS websites that host the iMIS site on each server:

- ~\Templates\Masterpages\[websiteName].master
- ~\[websiteName]\Default.aspx
- ~\App_Themes\[websiteName] (the entire folder)

Troubleshooting

- You must be a member of at least one content authority group (CAG).
- On every web server that you plan to use for hosting iMIS sites, you must have performed all the steps described in Installing iMIS content management on web servers, and you must know the URL that points to the IIS application or IIS website that you created during that procedure for hosting your iMIS sites.
- If you plan to host an iMIS site on multiple servers, you must have administrative access to the file systems on each server.

- Modifications to your master pages might be required if iParts appear to overflow the boundaries of iPart zones. In general, this requires modifying the template's master page and accompanying CSS files to make the Home page and interior page layouts larger than their default size.

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

  Where to go from here?

  When you have created a brand new iMIS site, the system automatically creates a corresponding sitemap and a content folder that is already configured so that its children content records are included in searches that are performed on the site. The content folder is also configured by default to publish its children content records to all publishing servers defined in the system, which means that the publishing service for every IIS application and IIS website that hosts iMIS sites will render .aspx files for every published content record in the folder and place them in the Local Publish Path as specified in each publishing server's definition.

  This default configuration of the site's corresponding content folder makes it easy to build the site content by creating content records only in that particular content folder, and then creating corresponding navigation items for each of those content records.

  While this approach is simple, it doesn't take advantage of the flexibility and sophistication that iMIS content management content folders and publishing servers can provide. Here are some ideas for creating more sophisticated web content authoring and publishing configurations:

- You can use any combination of content folders and their content records to populate a site. This enables you to reuse a single content record in multiple sites. To do this, you must make the following changes to every content folder that you want to use for a particular site's content (see Defining content folders):

- Specify the site in the Include content in Searches for these additional Sites field to ensure that searches performed on the site will find the content records in the content folder.
- Ensure that the Publish on Servers field resolves to a set of publishing servers that will publish the content records in the content folder to all of the IIS applications and IIS web-sites that host the iMIS site.
- Enable workflow for content authoring on one or more of the content folders used for the site's content to create a structured web content authoring environment. See Enabling workflow for content authoring.

  Modifying the site navigation areas

  Another aspect of a site's look and feel is the configuration of the navigation areas that are supported by the site's master page. In the Navigation Areas section of a site's definition, you can choose exactly which of the supported navigation areas are made available for use in the site's navigation items. You can also change the behavior of the available navigation areas by modifying their definition (but this affects all sites that use those navigation areas so care must be taken).

  Additionally, you can define entirely new navigation areas and make them available for use in the site's navigation items if you also add supporting code for them in the site's master page. See Defining navigation areas and breadcrumb areas.

  The Auxiliary navigation area has two other additional controls following it, which visually appear to be part of the Auxiliary navigation area but are actually independent. If you modify the master page to relocate the Auxiliary navigation area, the following two controls will remain in their original location in the page layout (see Integrating hand-built master pages and themes with WCM):

- Authentication control - this is where the Log On or Log Off link appears.
- Surf-to-Edit control - this is where the icon that toggles Surf-to-Edit mode appears for users who are logged on to the site and have the required permissions to use Surf-to-Edit.

Integrating hand-built master pages and themes with iMIS content management

To integrate hand-built themes with iMIS sites

In conformance with standard ASP.NET conventions, each theme must be placed in a uniquely named folder inside the ~\App_Themes folder in the physical path for each IIS application and IIS website used for hosting iMIS sites. This ensures that the theme name will be selectable when defining an iMIS site. The name you use for the folder is the name that users will see when choosing a theme for the iMIS site.

To ensure that all iMIS functionality is styled correctly, the best approach for developing new themes is to start with a copy of an existing theme|topic=Copying a site theme, instead of trying to develop a new theme entirely from scratch.

To integrate hand-built master pages with iMIS sites

Each master page must be placed in the ~\Templates\MasterPages folder in the physical path for each IIS application and IIS website used for hosting iMIS sites.

When developing a new master page, you must ensure that certain required ASP.NET classes are inherited and that certain required elements are used. There are also many optional elements that you might want to use. These classes and elements are described in the following sections.

Caution! Include non-required elements in your master page even if they are not required, and use a visible="false" attribute in each element that you do not want to display.

Note: To see examples of how these elements should be used in a hand-built master page, examine one of the Sample Site's master pages, such as Forrest.master, or Planets.master.

Required classes

- All master pages must inherit the Asi.Web.UI.MasterPageBase class, located in the Asi.Web assembly. This class provides base functionality for integration with iMIS. For example:

  <%@ Master Language="C#" Inherits="Asi.Web.UI.MasterPageBase" %>

- If you intend to use content areas and a different page layout for your Home page versus every other page on the site, then you should not directly inherit the Asi.Web.UI.MasterPageBase class, but instead inherit the Asi.Web.UI.TemplateGalleryMasterPageBase class (which in turn inherits the Asi.Web.UI.MasterPageBase class). For example:

  <%@ Master Language="C#" Inherits="Asi.Web.UI.TemplateGalleryMasterPageBase" %>

  Required elements in all master pages

  The following elements are required on every master page regardless of which base class the master page inherits:

- The head element must contain a child asp:ContentPlaceHolder element with an id attribute of TemplateHead. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateHead">

- The body element must contain a single child form element with an id attribute of TemplateForm. The runat attribute for this element must be server. This form element must be the only child of the body element and all DIV-based layouts must be contained within this form element. For example:

  <form runat="server" id="TemplateForm" method="post"></form>

- The asp:panel element with id="ContentPanel", which comprises the Main Content Area of an interior page, must contain the following elements:

- An asp:ContentPlaceHolder element with an id attribute of TemplateUserMessages. This displays non-fatal error and warning messages on pages. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateUserMessages">

- An asp:ContentPlaceHolder element with an id attribute of TemplateBody. This is where the rendered output of a content record is typically displayed. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateBody">

- The asp:Panel element with id="ButtonPanel", which conditionally displays the buttons at the bottom of the Main Content Area of an interior page (Save, Cancel, and so forth), must contain an asp:ContentPlaceHolder element with an id attribute of TemplateButtonBar. For example:

  <asp:ContentPlaceHolder runat="server" id="TemplateButtonBar">

- The asp:Panel element with id="SubNavPanel", which comprises the default Secondary navigation area of page, must contain an asp:ContentPlaceHolder element with an id attribute of SideBarPlaceHolder. This is used to display additional context-sensitive navigation information, such as clustered page navigation. For example:

  <asp:ContentPlaceHolder runat="server" id="SideBarPlaceHolder">

  Additional required elements in master pages that inherit the TemplateGalleryMasterPageBase class

  If the master page is inheriting the Asi.Web.UI.TemplateGalleryMasterPageBase class, then to provide support for a Home page that uses a different page layout from all the interior pages of the site you must also include the following elements:

- The DIV that is the immediate child of the form element must contain an asp:Panel element with id="HomePageContent". This asp:Panel element must in turn contain an asp:ContentPlaceHolder element with an id attribute of HomePageBody. This set of elements provides support for a Home Page that uses a different layout from the interior pages. For example:

  <asp:Panel ID="HomePageContent" runat="server">

  <asp:ContentPlaceHolder ID="HomePageBody" runat="server" />

  </asp:Panel>

- The script element should include the following code:

  <script language="C#" runat="server">

  override protected void EnsureContentAreas()

  {

```
  HomepageContentAreas = new Sys-
tem.Collections.Generic.List<ContentTemplateArea>(
    new ContentTemplateArea[]
    {
      HomepageContentArea1,
      HomepageContentArea2,
      HomepageContentArea3,
      // List all homepage content areas here
    });
  InteriorContentAreas = new System.Collections.Generic.List<ContentTemplateArea>(
    new ContentTemplateArea[]
    {
      ContentArea1,
      ContentArea2,
      ContentArea3,
      // List all non-homepage content areas here
    });
}
override protected SiteMapNode GetStartingNode()
{
  return Secondary.GetStartingNode();
}
override protected SiteMapNode GetCurrentNode()
```

```
{
  return Secondary.GetCurrentNode();
}
// Remove this if you omit the login/logout control.
protected void LoginStatus1_OnLoggedOut(object sender, EventArgs e)
{
  Asi.Web.Security.RevokeAppContext(HttpContext.Current);
  if (Page is Asi.Web.UI.DisplayPageBase && ((Asi.We-
b.UI.DisplayPageBase)Page).iMISWebsite != null)
    Response.Redirect(((Asi.Web.UI.DisplayPageBase)Page).iMISWebsite.WebsiteLink,
true);
  else
    Response.Redirect(System.Web.Security.FormsAuthentication.DefaultUrl, true);
}
</script>
```

To add content areas

If your master page is replacing a default Sample Site master page, you must provide controls to display the content designated for content areas in the template's Home and interior pages. You do this by adding the following element to the master page wherever you want the content area to appear:

```
<asiweb:ContentTemplateArea id="ContentArea1" TemplateAreaName="ContentArea1"
runat="server" />
```

The id attribute is not used by iMIS, so it can be any value. The TemplateAreaName attribute indicates which content record to display in this content area. The value you specify must match the name of a content record located in the site's special ContentAreas

content folder (@/[WebsiteName]/ContentAreas by default, in the Content Designer content folder hierarchy).

To enable home page content layouts in master pages

If you want to use content layouts in your template master page, you must enable a property. You do this by adding the following markup to the content areas for the master page:

1. Find this control markup in the page:

   <asiweb:ContentTemplateArea

2. Add the following property setter to that control:

   HonorContentRecordLayout="true"

3. Repeat for each content area that you want to honor the layout. The resulting line should appear:

   <asiweb:ContentTemplateArea id="HomepageContentArea2" templateareaname="HomepageContentArea2" HonorContentRecordLayout="true" runat="server" />

To add the top bar controls

The top bar controls comprise the Sign In / Sign Out link and the icon that toggles Surf-to-Edit mode on and off. You can place these controls anywhere on the page.

- The control for the Sign In / Sign Out link must be defined with the following asp:LoginStatus element:

  <asp:LoginStatus ID="LoginStatus1" runat="server" LoginText="Log On" LogoutText="Log Off"

  AccessKey="l" OnLoggedOut="LoginStatus1_OnLoggedOut" CssClass="LoginStyles" />

- The control for the icon that toggles Surf-to-Edit mode must be defined with the following asp:ContentPlaceHolder element:

<asp:ContentPlaceHolder ID="AuxiliaryNavigationSupplementalContent" run-at="server">

</asp:ContentPlaceHolder>

To add a browser session keep-alive control

The browser session keep-alive control forces a user's session and logon credentials to remain active as long as they keep the browser open, which prevents them from being required to re-authenticate to IIS if they do not use the site for an extended period of time. This control is defined with a pair of elements:

<asp:Label ID="KeepAliveTarget" runat="server" Text=" " />

<asiweb:KeepAliveExtender ID="KeepAliveControl" runat="server" Tar-getControlID="KeepAliveTarget" />

These elements might be located in the same DIV that contains the Auxiliary navigation area, but there is nothing that requires these elements to be located there.

To add a basic search control

Define a DIV element to be used as a container for the search form control. This DIV ele-ment must contain the following asiweb:SimpleSearchField element:

<asiweb:SimpleSearchField ID="SearchField" runat="server" AdvancedLinkVis-ible="false"

ButtonCssClass="SearchButton" InputCssClass="Watermarked" />

More about the AdvancedLinkVisible attribute:

- (recommended) Leave this attribute set to false. The preferred method for creating advanced search forms is to create a single AdvancedSearch iPart in a content record that is the target of a navigation item with Navigation Link Text such as Advanced Search.
- If you set this attribute to true and add a SearchTargetUrl attribute (for example, SearchTargetUrl="~/MyAdvancedSearch.aspx"), the basic search control in your site will

include an Advanced Search link, which will display the target .aspx page. This technique lets you use a hand-built advanced search page for the site.

Tip: You can also modify the basic search control by adding additional attributes not shown in the preceding code sample. See "Extending the default search behavior".

To add the page task controls

The page task controls comprise a set of three icons that enable the user to display a printable version of the page, display a text-only version of the page, or to email the page's URL to a friend. These are typically located at the bottom left of each page in the Sample Sites.

Define a DIV element to be used as a container for the page task controls. This DIV element must contain the following asp:Panel element:

```
<asp:Panel ID="PageTasksPanel" runat="server" CssClass="PageTasksPanel NotPrinted">
  <span style="margin:auto;">
    <asp:ContentPlaceHolder ID="TemplatePageTasks" runat="server">
    </asp:ContentPlaceHolder>
  </span>
</asp:Panel>
```

Troubleshooting

- You must have developed your hand-built master pages and themes in accordance with ASP.NET best practices and requirements.
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- The root of all file paths used in the following sections is denoted by ~, and corresponds to the root of the physical path for each IIS application or IIS website used for hosting iMIS sites. For example, in a Complete installation of iMIS where the iMIS application is

used for hosting iMIS sites, the default physical path is C:\Program Files\ASI\iMIS\Net, so the Net folder is the root (~).

Defining custom iParts as content types

To define iParts

You define an iPart by defining its supporting content type. When you save the definition of the content type, the new iPart appears in the Content Gallery for use by all people who perform web content authoring. You can also transport and deploy your iPart using the Package Installer.

Go to RiSE > Maintenance > Content Types:

Do one of the following:

- Select New > Content Type to create a new content type.
- Select a content type and then click Edit to change an existing content type.
- Select a content type and then select Organize > Delete to delete a content type.

Note: When specifying paths to controls, be sure to use root-relative URLs with forward slashes (/) for the segment delimiters. Example: ~/CustomControls/myControl.ascx

If you want to use a custom control without adding it to content types, then skip the previous steps and go straight to editing or creating your content record:

Go to RiSE > Content Designer > Manage content:

1. Do one of the following:

- Select New > Website Content.
- Select a content record and then click Edit.

2. Click add content and use the Or, enter a path to a web user control field within the Content Gallery.

This allows implementers to add enhancements to iMIS or your iMIS sites in an ad hoc manner. This field applies only to one-time use iParts. For multiple-use iParts, you must define the content type.

To add a single-use control, use the Or, enter a path to a web user control field to add a custom iPart in an ad hoc manner. You must place the iPart control (the .ascx file) somewhere in the virtual directory structure beneath the iMIS application in IIS and then specify the relative path to the control in this field. For example, entering ~/TestWebUserControl.ascx would add the TestWebUserControl found in C:\Program Files\ASI\iMIS\net\ on the iMIS application server.

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- You must be familiar with ASP.NET development concepts and techniques, especially those related to creating user controls and data contracts, and creating and compiling classes.
- Ensure that the custom user controls that are used for both your simple and complex iParts are placed in the same relative folder beneath the root (~) of the physical path for all IIS applications and IIS websites that host your iMIS sites. Make note of the relative URL to this folder (such as ~/CustomControls), because you must specify this value when defining iParts.
- If you are defining complex iParts, you must also ensure that the class libraries containing the custom classes that are used for the corresponding content type are placed in the bin folder beneath the root of the physical path for all IIS applications and IIS websites that host your iMIS sites. Make note of the relative URL to this folder (such as ~/bin), because you must specify this value when defining complex iParts.

Copying a new class library to the bin folder will cause each server's worker process to be recycled, so you should generally perform this task during scheduled maintenance or other downtime.

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

Simple versus complex iParts

Simple iParts have no custom configuration and are linked to only a single ASP.NET user control. iMIS content management displays a basic editor when users select a simple iPart from the Content gallery. You cannot customize how simple iParts are rendered or published, but you can expose properties of the user control in this basic editor by using the Personalizable and WebBrowsable attributes (and optionally, the WebDisplayName and WebDescription attributes too) in the code for the user control. For example:

```
[Personalizable(PersonalizationScope.User)]

[WebBrowsable()]

[WebDisplayName("Document System Path")]

[WebDescription("The full Document System path (e.g., starting with $/) to

   the query or folder of queries to use to find the desired information.

   Used to find information by Query.")]

public string DocumentPath

{

  get

  {

    ...
```

```
  }
  set
  {
    ...
  }
}
```

Complex iParts can be controlled in how they are configured, rendered, and published. All of the default iParts in the iMIS content management environment are complex iParts.

Defining navigation areas and breadcrumb areas

Caution! The four default navigation areas provided with iMIS content management (Primary, Secondary, Auxiliary, and Footer) are used by iMIS. If you delete these navigation areas or modify their properties, you might adversely affect the normal functioning of iMIS. If you need a different navigation behavior for an iMIS site, always create new navigation areas for the site, and then modify the site's master page to use the new navigation areas.

To specify which navigation areas to use in a site

Do the following to specify the navigation areas to use in a site.

Go to RiSE > Site Designer > Manage websites:

1. Select a website.
2. Click Edit.
3. (Navigation Areas tab) Select the checkboxes for each navigation area that you want to be available for use by navigation items that you define in the sitemap for this site.
4. Click Save.

If you clear any checkboxes that were previously selected in this section, all navigation items that are currently defined to be displayed in that navigation area will still appear in

that navigation area in rendered site pages. This happens because the master page for the site still contains a framework for the navigation area, and currently published navigation items still contain the properties that make them be displayed in the navigation area that you no longer want to be available for use in this site. The navigation area will not completely disappear from your rendered site until you edit and save every existing navigation item in the site's sitemap.

To delete navigation areas from the entire system

Caution! You must not delete or change the properties of the four default navigation areas provided with iMIS content management: Primary, Secondary, Auxiliary, and Footer. These navigation areas are also used by iMIS. If you want to remove one of these default navigation areas from a site, it is safer to do so by removing the corresponding control from the site's master page.

You should avoid deleting a navigation area unless you are very sure of the ramifications, because doing so will remove the navigation area from the entire system, which affects all iMIS sites in the system.

Do the following to delete navigation areas in a site.

Go to RiSE > Site Designer > Manage websites:

1. Select any website in the list as they all share the same list of available navigation areas.
2. Click Edit.
3. (Navigation Areas tab) Click the Create or Edit Navigation Panes icon ( ).
4. Click delete next to the navigation item that you want to delete from the system.

   When you delete a navigation area, all navigation items that are currently defined to be displayed in that navigation area will still appear in that navigation area in rendered site pages, because the master page for the site still contains a framework for the navigation area, and published navigation items still contain the properties that make them be displayed in the deleted navigation area. The navigation area will not completely disappear

from all of your rendered sites until you edit and save every navigation item in the system that currently uses that navigation area.

To edit the properties of existing navigation areas

Caution! You must not delete or change the properties of the four default navigation areas provided with iMIS content management: Primary, Secondary, Auxiliary, and Footer. These navigation areas are also used by iMIS. If you want to change the behavior of one of these default navigation areas, it is safer to do so by creating an entirely new navigation area with the desired properties and then modifying the controls on the site's master page to use these new replacement navigation areas.

The properties of a navigation area are applied equally across all sites that use the navigation area. You must consider this effect when changing the properties of a navigation area.

Do the following to edit the properties of an existing navigation area.

Go to RiSE > Site Designer > Manage websites:

1. Select any website in the list as they all share the same list of available navigation areas.
2. Click Edit.
3. (Navigation Areas tab) Click the Create or Edit Navigation Panes icon (✏).
4. Click select next to the navigation item that you want to delete from the system.

To add new navigation areas to the system and to master pages

Because the properties of a navigation area are applied equally across all sites that use the navigation area, the way that you make a certain navigation area behave differently from site to site is by creating new navigation areas that are each used in the same general area of each site's master page, but that have different properties from each other. This process requires you to first add the new navigation item to the system, and then to modify the desired section of each site's master page to use the appropriate navigation area.

For example, you might want the Primary navigation area in two different sites to behave differently from each other. You would create a new navigation area named something like Primary2, making its properties slightly different from the Primary navigation area. No change would be needed to the master pages for sites that use the Primary navigation area. But the sites that you specify to instead use Primary2 would need to have their master pages edited to use the Primary2 navigation area in the section where they were previously coded to use the Primary navigation area.

Do the following to add new navigation areas to the system and to the master pages.

Go to RiSE > Site Designer > Manage websites:

1. Select any website in the list as they all share the same list of available navigation areas.
2. Click Edit.
3. (Navigation Areas tab) Click the Create or Edit Navigation Panes icon (✏).
4. Click add near the top of the window.
5. Define the properties of the new navigation area and click Save.
6. Click select next to the newly-created navigation area.
7. Note the displayed Navigation Pane Code and Name.

In the master page for sites that will use this new navigation area, you can either modify existing navigation-handling controls to use the new navigation area, or you can add entirely new navigation-handling controls to the already existing set in the master page.

- To modify an existing navigation-handling control, replace the value of the control's ID attribute with the Name that you recorded in Step 7, and replace the value of the control's NavigationPaneCode attribute with the Navigation Pane Code that you recorded in Step 7. The default navigation-handling controls in the master page are:
- For the Primary navigation area – <asi:PageNav>
- For the Secondary navigation area – <asi:PageSubNav>
- For the Auxiliary navigation area – <asiweb:NavigationList> (ID="Auxiliary")

- For the Footer navigation area – <asiweb:NavigationList> (ID="Foot")
- To add a new navigation-handling control, copy either the Auxiliary or Footer control and paste it into an appropriate section of the master page. Then replace the value of the control's ID attribute with the Name that you recorded in Step 7, and replace the value of the control's NavigationPaneCode attribute with the Navigation Pane Code that you recorded in Step 7.

  To add a breadcrumb area to master pages

  To add a breadcrumb-handling control to a hand-built master page, copy the following code from any ASI-developed master page (all ASI-developed master pages contain a breadcrumb area) into an appropriate DIV of the master page.

  Note: The administrative views do not support breadcrumb-handling controls.

  Note: The default ASP.NET breadcrumb control is not recommended for the iMIS content management environment. The following compatible breadcrumb control should be used in the default ASP.NET breadcrumb's place, which enables the navigation item's Title and its corresponding Breadcrumb Name that is displayed in the breadcrumb area to be different from each other.

```
<asp:Panel ID="TaskPanel" runat="server">
  <asp:Label ID="TaskDescription" runat="server" Visible="false"></asp:Label>
  <asiweb:SiteMapPath ID="BreadCrumb" runat="server" SiteMapPro-
vider="AsiSiteMapProvider">
    <NodeTemplate>
      <asp:HyperLink ID="NodeLink" runat="server" NavigateUrl='<%# Eval("Url") %>'
        Text='<%# Eval("NavigationHierarchy.Navigation.BreadCrumbName") %>'
        CssClass="BreadCrumbLink">
      </asp:HyperLink>
    </NodeTemplate>
```

```
    <CurrentNodeTemplate>
      <asp:Label ID="CurrentNodeLabel"
        runat="server"
        Text='<%# Eval("NavigationHierarchy.Navigation.BreadCrumbName") %>'>
      </asp:Label>
    </CurrentNodeTemplate>
  </asiweb:SiteMapPath>
</asp:Panel>
```

Troubleshooting

- You must be a member of at least one content authority group (CAG).
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- If you are planning to add an entirely new navigation area to your system (instead of reusing one of your currently defined navigation areas), ensure that you have not already exceeded the system limit of 30 uniquely defined navigation areas. Four default navigation areas (Primary, Secondary, Auxiliary, and Footer) are predefined in iMIS.
- You must be familiar with ASP.NET development techniques and the design and construction of ASP.NET master pages.

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

  Tips

  The following information can be helpful when defining navigation areas and breadcrumb areas.

How the automated contents of navigation areas are determined

A combination of user-defined settings in Site Designer and the choice of three possible ASI-developed controls used in a site's master page determine what is displayed in each navigation area defined in the master page.

When you define navigation items in Site Designer, there are three properties you specify that relate to the hierarchy of the site's sitemap:

- Static Display Levels
- Dynamic Display Levels
- Starting Level

To understand the interplay of these three properties, see the Navigation Areas section of Fields: websites. In short, these properties are only defaults that are subsequently over-ridden to varying degrees by the type of control you use in the master page to render the navigation areas.

In the master pages:

- Primary navigation (if present) is rendered either by the asi:PageNav control (for older templates) or the asi:PageNavR control (for newer templates), which renders a larger set of horizontal, single-level, tab-style links above the main content area.
- Secondary navigation (if present) is rendered by the asi:PageSubNav control, which renders a vertical set of expandable, multi-level links at the left or right side of the main content area.
- Auxiliary and Footer navigation (if present) are both rendered by the asi-web:NavigationList control, which renders a compact set of horizontal links, for place-ment near the top and bottom of the entire browser window.

In your own hand-built master pages, you can use any of these three controls to render any of the navigation areas used in the site. Which control you should use depends on the results you want to achieve, because each control overrides the default display level properties defined in each navigation area in different ways:

- asi:PageNav and asi:PageNavR ignore the Starting Level and the Static Display Levels defined in the associated navigation area. It is hard-coded to start the first level of the sitemap hierarchy below the sitemap root (~), and then to display the number of additional sitemap levels defined in the Dynamic Display Levels of the associated navigation area.

  For example, the default Primary navigation area is defined with a value of 0 for its Dynamic Display Levels. As a result, the Primary navigation area displays only the first level of the sitemap hierarchy below the sitemap root.

- asi:PageSubNav ignores the Starting Level and the Dynamic Display Levels defined in the associated navigation area. This control is hard-coded to start at the second level of the sitemap hierarchy below the sitemap root (~), and then to display the number of additional sitemap levels defined in the Static Display Levels of the associated navigation item.

  For example, the default Secondary navigation area is defined with a value of 4 for its Static Display Levels. As a result, the Secondary navigation area displays the second, third, fourth, and fifth levels of the sitemap hierarchy below the sitemap root. The default rendering behavior is to collapse all but the first of these four levels unless a descendant navigation item in the specified range is flagged to be expanded by default (with the This navigation item is expanded by default checkbox in the Options section).

  You can change the starting level of the sitemap hierarchy displayed by this control by changing the value of the StartingNodeOffset attribute. The offset that you specify in this attribute must be the sitemap hierarchy level minus 1. So, StartingNodeOffset="1" makes the control start at the second level of the sitemap hierarchy, but in the 1504 template, StartingNodeOffset="0" makes the control start at the first level.

- asiweb:NavigationList ignores the Starting Level, Static Display Levels, and Dynamic Display Levels. It is hard-coded to display only those navigation items that are flagged to be always shown in a navigation area that is rendered by this control (with the Show in the following navigation areas checkboxes in the Options section).

For example, the default Auxiliary and Footer navigation areas are rendered by this control. Only those navigation items in which Auxiliary or Footer checkboxes (or both) are selected beneath Show in the following navigation areas actually appear in the rendered output of this control.

The special primary footer

Master pages might insert a special primary footer that is not actually controlled by the Footer navigation area defined in iMIS content management. This can cause some unexpected results when you designate navigation items for use in the Footer navigation area, because the navigation items that you designate appear only in the bottom row of footer links.

What appears to be a single set of footer links spanning two rows actually comprises two separate sets that are rendered by two different controls:

- The top row of footer links is created by an asiweb:NavigationList control that is hard-coded with attributes to duplicate the content of only the first level of links shown in the Primary navigation area.
- The bottom row of footer links is created by an asiweb:NavigationList control that is associated with the Footer navigation area defined in the system.

You can duplicate this "primary footer" technique in your own hand-built master pages by pasting the following two elements directly above the one that renders the Footer navigation area:

```
<asp:SiteMapDataSource ID="SiteMapDataSource1" runat="server" />

<asiweb:NavigationList ID="PrimaryFoot" runat="server" NavigationPaneCode="1"
  UseGenericMenu="true" StartFromRootNode="true" SelectDefaultNode="false"
  SiteMapDataSourceID="SiteMapDataSource1" />
```

Extending the default search behavior

To replace the default search engine

Microsoft Index Server is the default search engine for iMIS sites. iMIS content management interacts with Microsoft Index Server by using the ASP.NET 2.0 provider model, so the default search provider (ImisSearchProvider) can be replaced with a custom search provider that is designed to use another search engine.

Refer to iMIS Community to learn techniques for replacing the default ImisSearchProvider provider with a custom search provider. You must be familiar with ASP.NET development concepts and techniques and you must be familiar with the ASP.NET 2.0 provider model.

If you replace the default search engine, you probably must also write corresponding index renderers to replace the default index renderers used by the iMIS rendering engine. See Extending the default content and index renderers.

To add ranking values to search results

Search results from the basic search control and from the advanced search pages that you create by using AdvancedSearch iParts are listed in descending order based on the ranking score given by Microsoft Index Server to each result. However, the default behavior for search results does not display the actual score for each item.

You can make the ranking score visible for each search result by adding the following key to the <SystemParams> declaration of the web.config file in the root of the physical path for your IIS applications and IIS websites that host your iMIS sites.

<add key="Search.DisplayRankValueInResults" value="true"/>

To tailor the basic search control

The basic search control that appears on most site pages can be configured to display different styles of prompt text and to display the specific prompt text that you prefer. To modify the default settings, edit the master page for an iMIS site and locate the following element:

<asiweb:SimpleSearchField ID="SearchField" runat="server" AdvancedLinkVisible="false"

ButtonCssClass="SearchButton" InputCssClass="Watermarked" />

Add the following three attributes to this element declaration to modify the prompt style and prompt text:

- PromptType
- PromptType="None" – Prompt text for the search control is not displayed.
- PromptType="Label" – Prompt text appears as a label near the search control, positioned above, or beneath, or to the left, or to the right of the search control as specified by the PromptPosition attribute.
- PromptType="Watermark" – Prompt text appears as watermark text inside the search control itself.
- PromptPosition (optional if PromptType="Label": if you omit this attribute, the default value is "Left")
- PromptPosition="Bottom"
- PromptPosition="Left"
- PromptPosition="Right"
- PromptPosition="Top"
- PromptText (optional if PromptType="Label" or "Watermark": if you omit this attribute, the default value is "Search")
- PromptText="[any string]"

Troubleshooting

- You must have administrative access to Internet Information Services (IIS) and the entire file system on all servers that you use for hosting iMIS sites.

Extending the default content and index renderers

To extend the default content and index renderers

The iMIS content management rendering engine provides an extensible method for applying several rendering steps when a content record is published. Several default content

renderers control how the ASI-provided iParts are visually rendered in supported web browsers. Several default index renderers control how each content type is indexed for use by the default search engine.

The rendering steps applied to a complex iPart are controlled by the IContentType class that is defined in the content type that supports the iPart. You can replace the default rendering steps by creating a custom IContentType class and specifying that class in the content type that supports a specific iPart.

The custom IContentType class must inherit the base IContentType class provided with iMIS content management (Asi.Business.ContentManagement.ContentType.ContentTypeBase). You then override one or more of the following methods that are defined in the base class to achieve the content and index rendering results that you desire:

- To change the content rendering steps, override the RenderForPublish or RenderForDisplay methods (or both).
- To change the index rendering steps, override the RenderForSearch method.

Troubleshooting

- You must be a member of at least one Master Admin content authority group (CAG).
- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.
- You must be familiar with ASP.NET development concepts and techniques, especially those related to creating user controls and data contracts, and creating and compiling classes.

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

Tip: ContentFile types that are indexed for search

The files that you specify for the download link in a ContentFile iPart can be indexed by Microsoft Index Server if you have a corresponding iFilter installed on every server that is hosting your iMIS sites.

Adjusting the site keep-alive service

The site keep-alive service is initiated at regular intervals by the publishing service associated with an iMIS site. The keep-alive service automatically pre-loads all your iMIS sites in IIS if IIS is restarted for any reason. Without this keep-alive service, the first browser to request a URL from any of the iMIS sites after an IIS restart would experience a long initial load time.

You can adjust the default settings of the site keep-alive service by editing the following keys in the <appSettings> element in the configuration file PublishService.exe.config, which is located in the bin folder beneath the root of the physical path for the IIS application or IIS website that hosts iMIS sites:

- The value of the following key should be true to enable the keep-alive pings from the publishing service, or set to false to disable the keep-alive pings.

  <add key="EnableSiteService" value="true" />

- The value of the following key should be the interval, in minutes, at which you want the keep-alive control to be pinged by the publishing service:

  <add key="PingInterval" value="15"/>

- The value of the following key should be empty if the keep-alive processing for this publishing service should affect only the IIS application or IIS website for which this publishing service was originally installed.

  <add key="AdditionalUrls" value=""/>

  However, you might prefer to consolidate the keep-alive processing for all of your iMIS sites (and even the various views of iMIS) onto one specific publishing service in your production environment to centralize your keep-alive configuration and logging. To do this, you would instead specify a comma-delimited list of the absolute URLs that resolve to the

IIS applications and IIS websites that host the iMIS sites that you want to be pinged by this publishing service. For example, the following value would ping the following additional IIS applications as well as the one for which this publishing service was installed: the iMIS application on your production iMIS server, and an iMIS site on an external web server.

<add key="AdditionalUrls" value="http://server1/iMIS,http://server3/WCMsite1"/>

Troubleshooting

- You must have administrative access to the entire file system on your iMIS application server and on all the external web servers that you use for hosting iMIS sites.

Importers and Exporters

Export Utility

The Export Utility lets you export information from the iMIS system to another location or to a third-party software application, such as a word processor, spreadsheet program, or compatible database application. The Export Utility lets you:

- Include information from multiple records of the same file on one export record
- Update fields in the iMIS database when the export is run
- Specify if/then processing of the output
- Create an activity record that records the date the export record was created and includes a copy of each member's export record
- Schedule the export execution time

To use the iMIS Export Utility, you must have the EXPORT license code in your system control file. Contact your authorized iMIS reseller to obtain an updated system control file.

Using the iMIS Export Utility

To export data using the iMIS Export Utility:

1. Create the export definition
2. Select the iMIS tables and fields to be exported
3. Specify the search criteria to be used
4. Specify the export field formats
5. Run the export

Creating an Export Definition

The first step to export data with the Export Utility is to create the basic export definition. The export definition specifies and formats the data to be exported.

To create the export definition

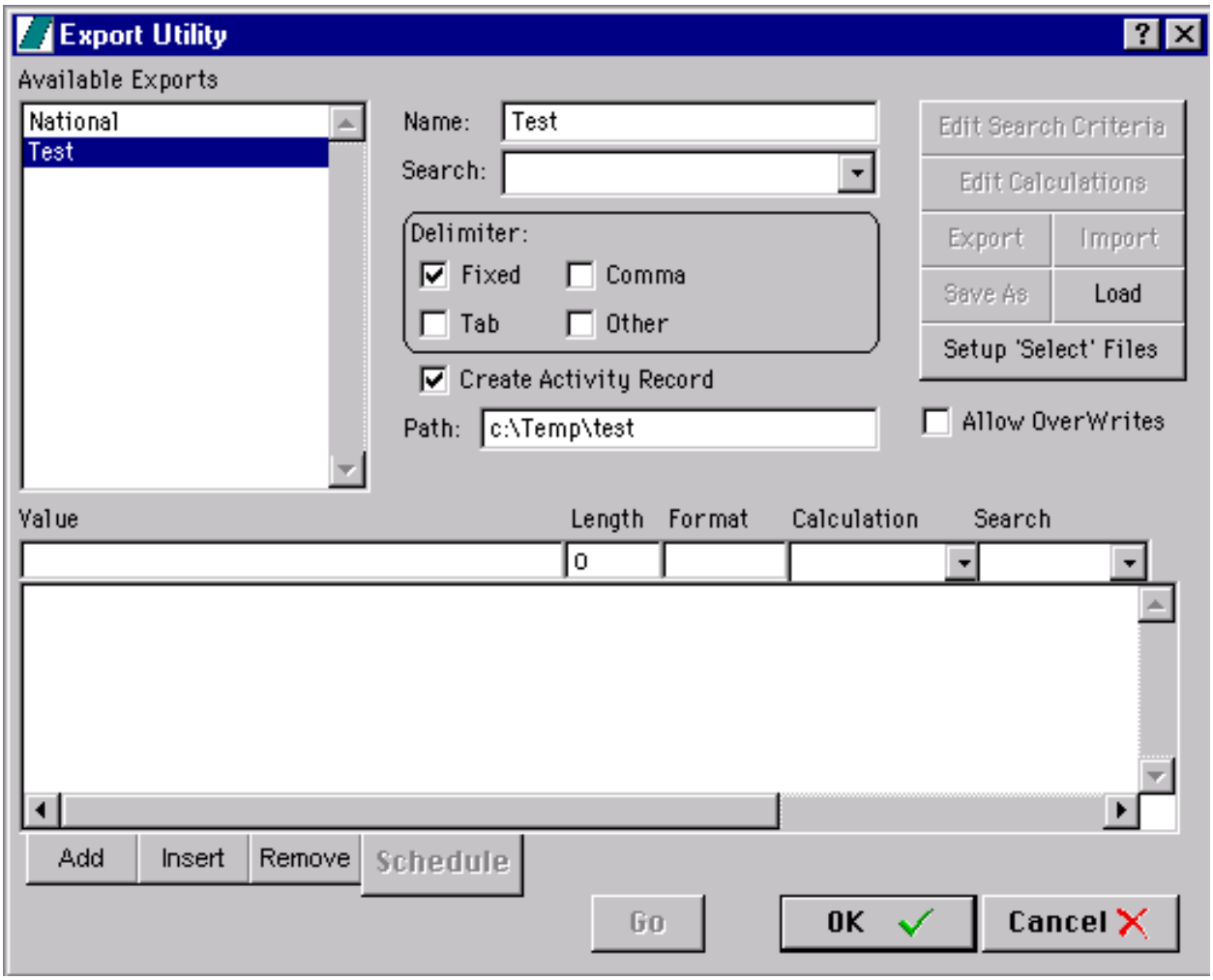
1. Select Utilities> Data Transfer Utilities> Export Utility.
2. Click Insert.
3. Type a name for the export definition in the Name field.
4. Select a Delimiter (character to be placed between fields):

- Fixed – no delimiter
- Tab
- Comma
- Other – specifies other delimiter in field that appears
- Quotes – encloses text in double quotes. This is helpful if a comma delimiter is required and some text fields contain commas.

  Note: This field displays only when a delimiter other than Fixed is selected.

5. (Optional) Enable the Create Activity Record option to record each export record as a member activity in the iMIS database.
6. Define the Path for the export file.

   Tip: You can include an incremental sequence number in the name of the file by including a question mark in the name of the file. For example, if you enter c:\Temp\national?.txt, the file c:\Temp\national1.txt is created the first time you run the export, c:\Temp\national2.txt is created the second time, and so forth.
7. (Optional) Select the Allow OverWrites option to allow the file to be overwritten each time the export is run.
8. Click OK to save.

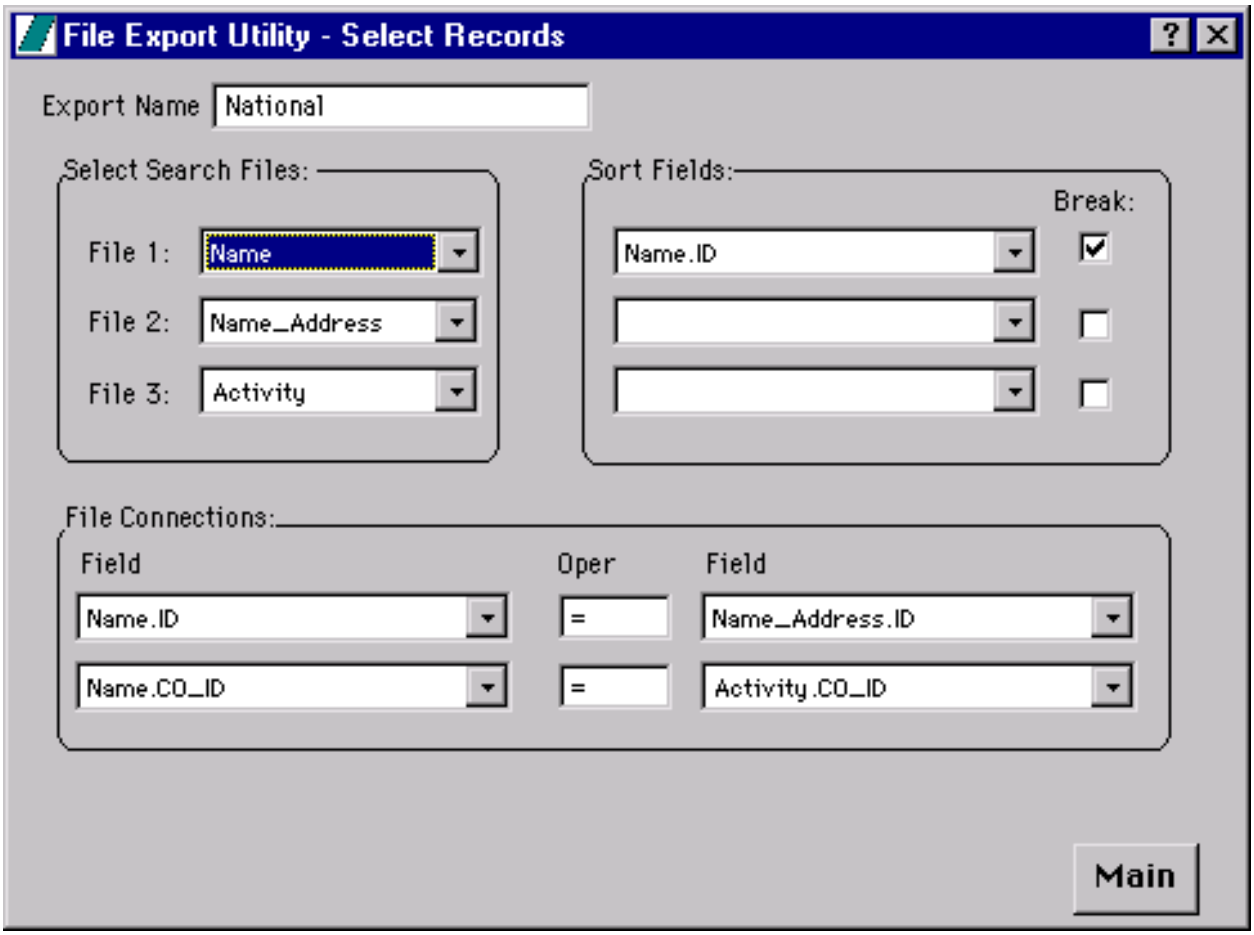


Selecting iMIS Tables and Fields to be Exported

After you create the export definition, select the iMIS tables and fields to be included in the export definition. These Select Files are the basis for the export. You can sort the export records based on a file/field value in the Select Files and you can define search criteria to designate data in the Select Files to be exported.

To select the iMIS tables and fields to be exported

1. Select Utilities> Data Transport Utilities> Export Utility.
2. Select an Available Export.
3. Click Edit. Click Setup ‘Select’ Files to open the File Export Utility - Select Records window.



4. Select up to three iMIS tables as Select Files.
5. (Optional) Select the Sort Fields for these files. This determines the order the records are exported.
6. (Optional) Select the Break option if you want to create an export record each time the value in the Sort Field changes.

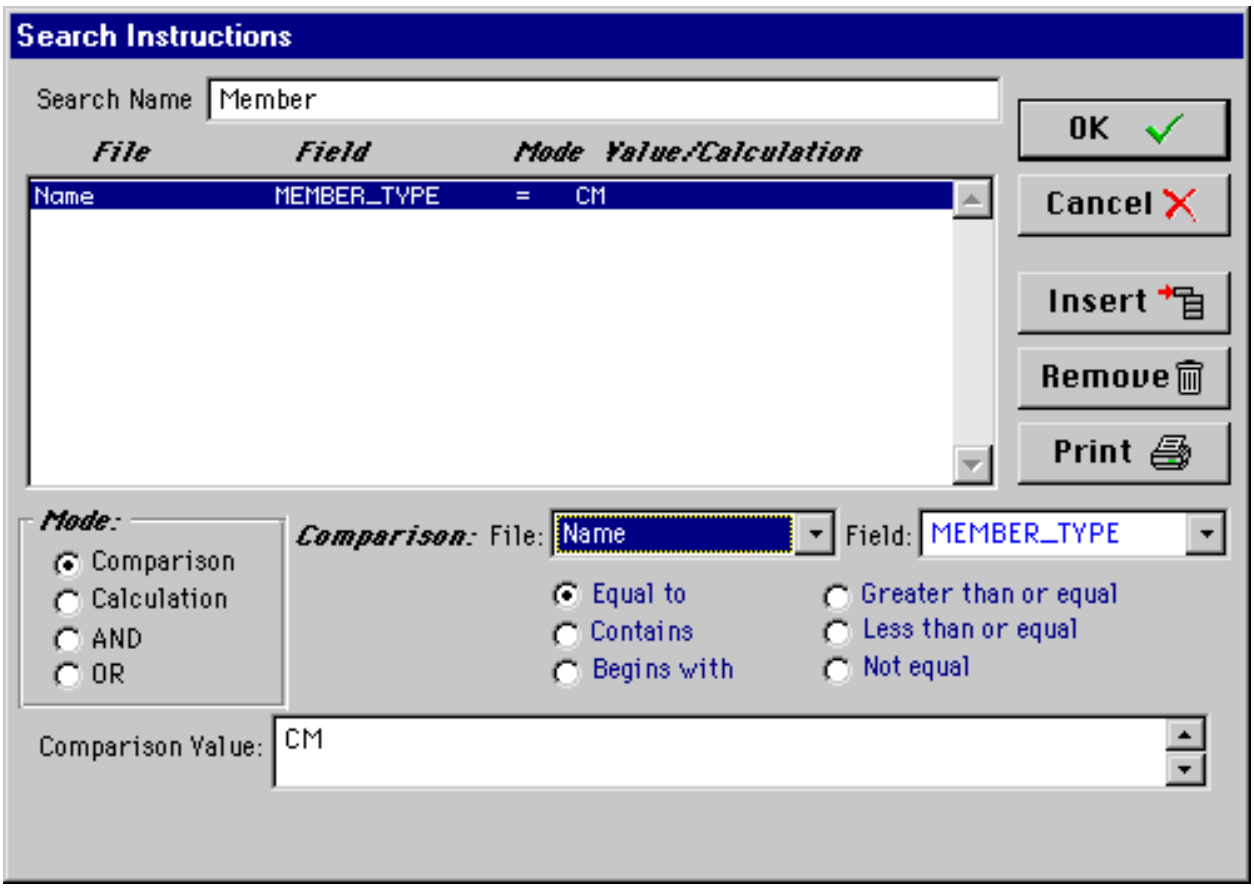
   Tip: To eliminate duplicate member export records, specify the Name.ID field as a Break field. The Export Utility will create only one export record for each unique Name.ID.
7. Define the joins for the Select Files (tables) in the File Connections fields.
8. Click Main to return to the Export Utility window.
9. Click OK to save.

Specifying Search Criteria

The next step is to specify the general search criteria for the export. The export will contain only the information in the Select Files that meets the search criteria.

To specify search criteria

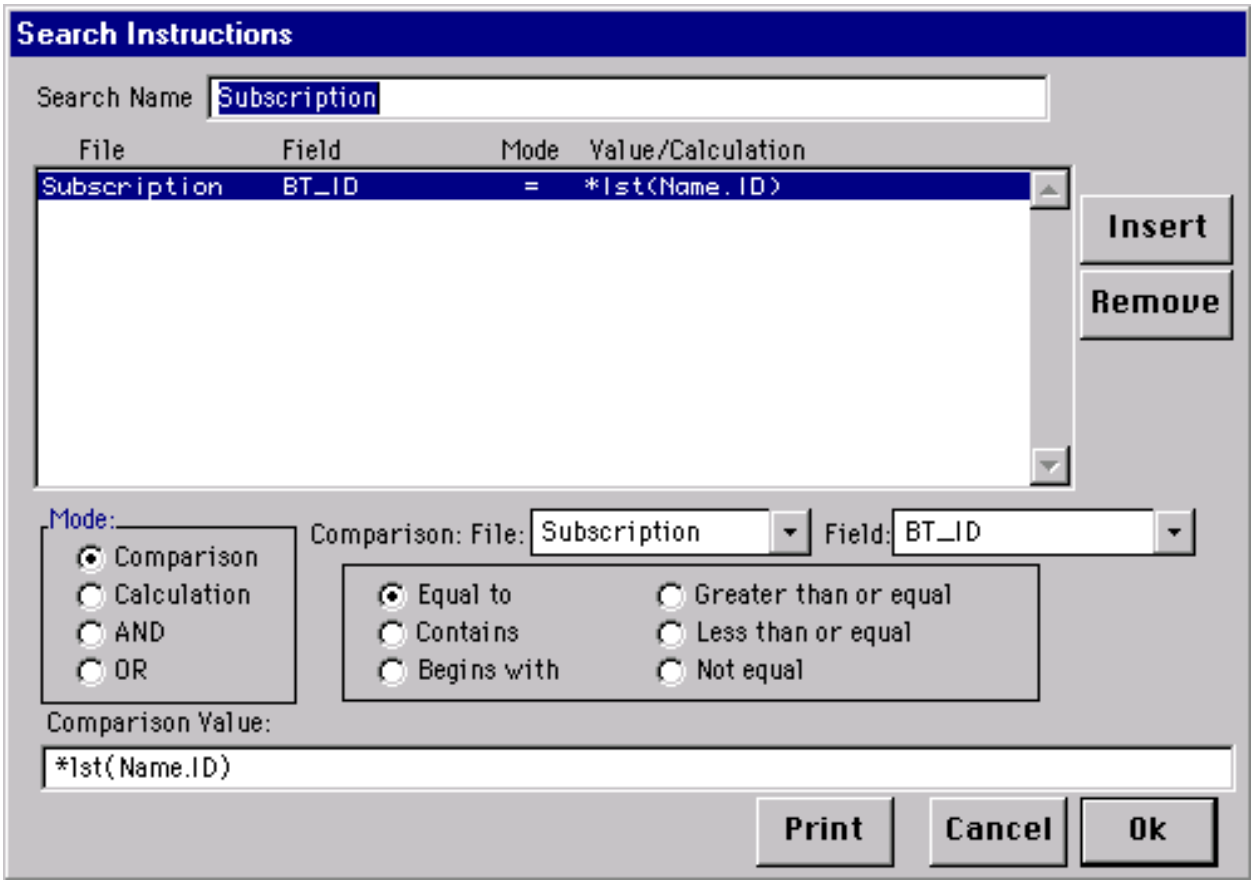
1. Select Utilities> Data Transport Utilities> Export Utility.
2. Click Edit Search Criteria to open the Select Search Instructions window.
3. Click New to open the Search Instructions window.



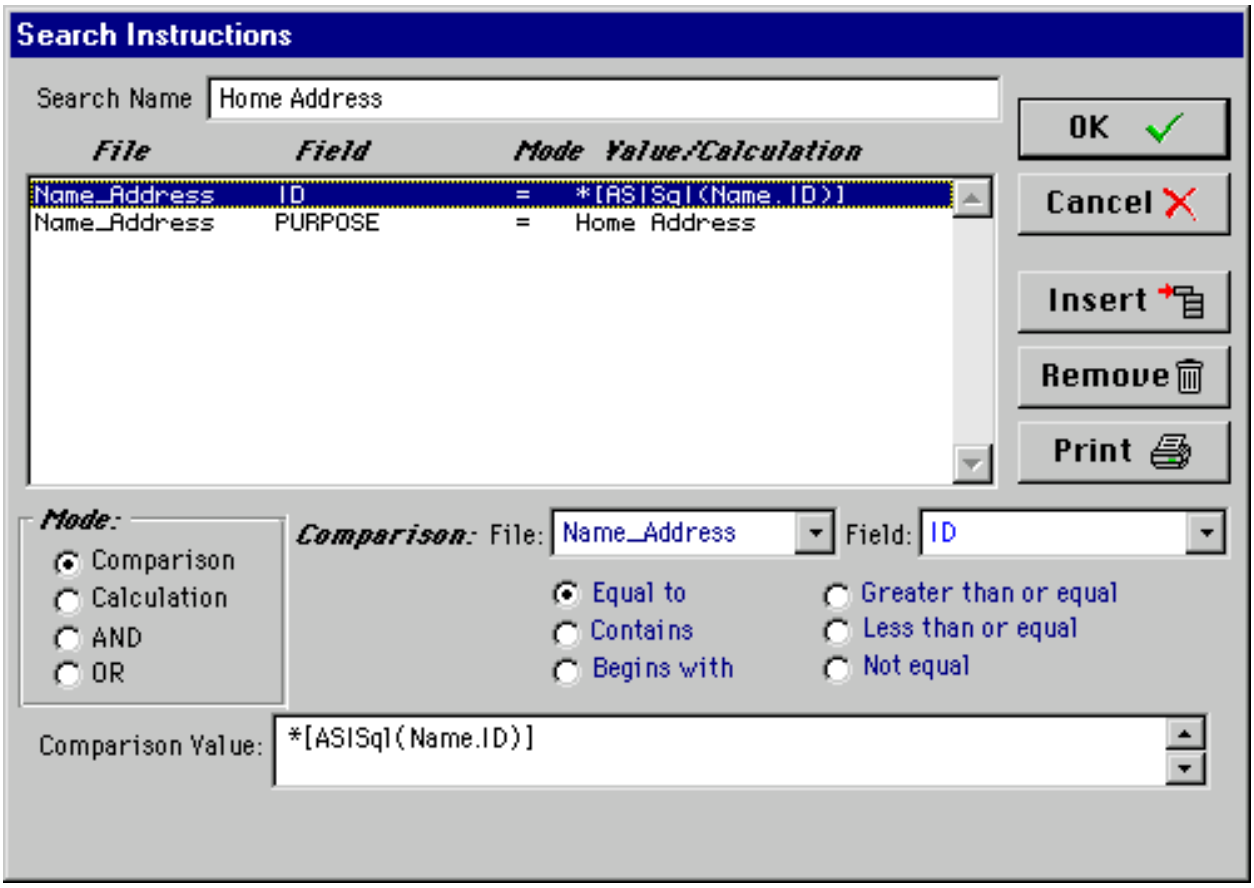
4. Enter the Search Name.
5. (Optional) Select the Mode. This option allows you to export only the files/fields that meet defined criteria (Comparison, Calculation, AND, OR).

   Note: If the Comparison Value is a field value, enter an asterisk (*) before the field name.
6. Click OK twice to save and return to the Export Utility window.

Tip: You can specify search criteria from a record in a file that is not one of the three Select Files or from another record within a Select File. If you are pulling information from a file other than a Select File, you must relate the file to one of the Select Files in the search criteria.



You can use SQL statements to specify the Comparison Value. For example, if Name is a Select File and you want to bring in the Home Address record, enter Name_Address.ID to search for a specific address. For the Comparison File/Field and enter *[ASISql (Name.ID)] for the Comparison Value, as shown in the following example.



Specifying Export Field Formats

Export field formatting is entered in the Comparison Value section of the Export Utility window. You can specify formatting for constants, iMIS field values, and Omnis calculations. You can also specify if/then processing of the output by formatting the export output with condition statements. This step narrows the general search criteria for specific fields.

To format export fields

1. Select Utilities> Data Transport Utilities> Export Utility
2. Select an Available Export.
3. Click Edit.
4. There are three types of values that can be exported: a constant, a value contained in an iMIS field, and an Omnis calculation. Enter the formatting in the Comparison Value field.

- To specify the format for a constant (literal) value, type a double-quotation mark followed by the value. For example, if the first four characters of the export record must contain the value 0001, type "0001 in the Comparison Value field.
- To specify the format for an iMIS field value, type the field name, for example, Name.MEMBER_TYPE.
- To specify the format for an Omnis calculation, type an equal sign followed by the calculation.
  For example, if you want to export the area code of the home telephone number field, type =mid(Name.HOME_PHONE,2,3). This statement exports the second, third, and fourth characters from the Name.HOME_PHONE field.

5. (Optional) Specify the desired Length of the field. This allows you to truncate or extend the field length.
6. (Optional) Enter a code in the Format field (see below).
7. Click Add to save the format.
8. After all formatting instructions are added, click OK to save the formats.

   The following table lists the available Format Codes.

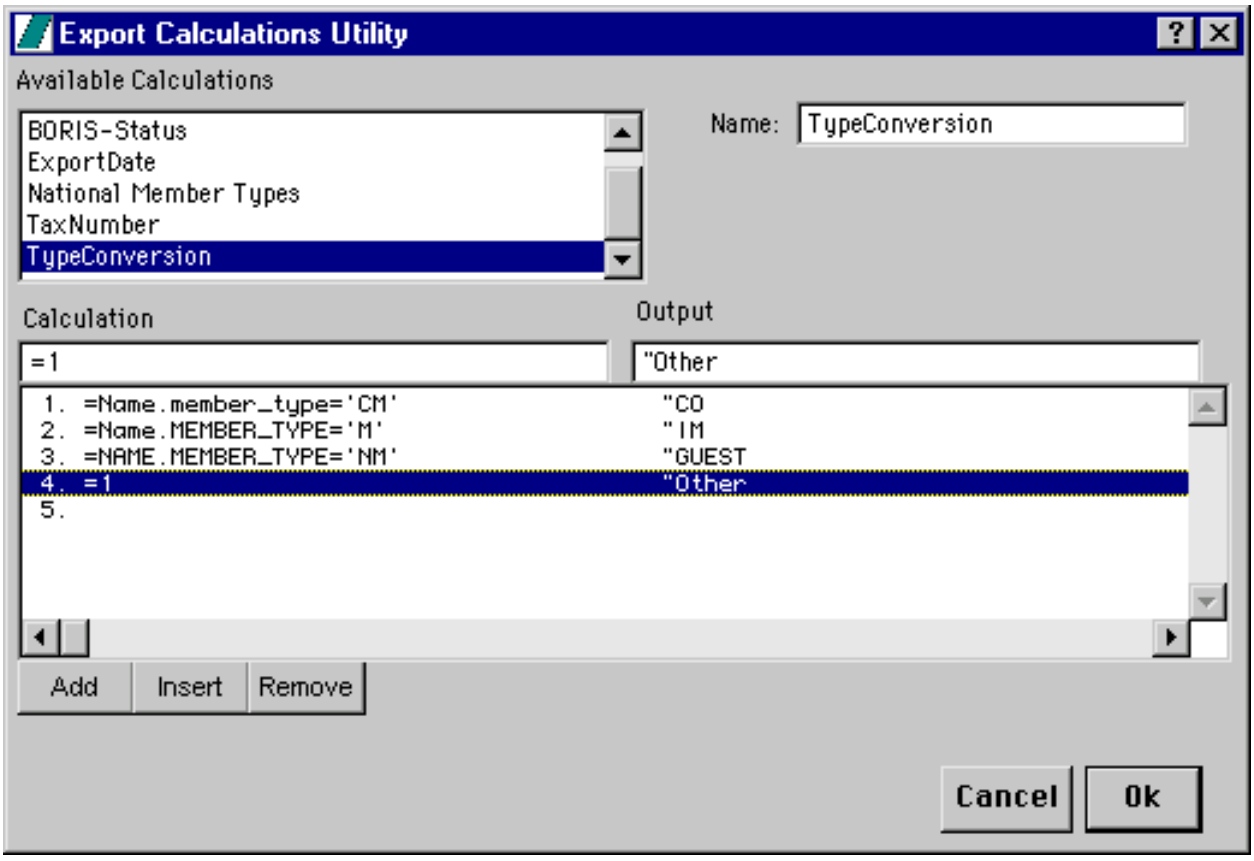
1	Exports the value on the first record only (useful for header records). Must be in the first position of the Format field.
C	Formats the output to initial capital letters
D6	Exports the value as a date in the MMDDYY format
D6/	Exports the value as a date in the MM/DD/YY format
D8	Exports the value as a date in the MMDDYYYY format
D8/	Exports the value as a date in the MM/DD/YYYY format
F	Appends a LF (line feed) return to the end of the field
L	Formats the output to all lowercase letters
P	Pads the field to the length specified in the Length field with the character immediately following the P

P0	Pads the field without zeros
N	Specifies all blank or zero field values to be output as 'Null'
N2	Same as N except that the characters. , - $ ( ) are saved
R	Appends a CR (carriage return) feed at the end of the field. Note: This code should be used with the last field of each format.
U	Converts the output to all uppercase letters
S	Skips the delimiter and concatenates with the next export column
X	Updates data in the iMIS database. Note: You must include search criteria and a calculation with this format. The search criterion identifies the specific record to be updated. The calculation determines the value that is output in the export record.
6X	Indicates which record will be selected when searching extra records. For example, the code 62 will take the field value from the second record that matches the search criteria.
Y	Outputs a YES or NO. If the field value or calculation in the Value field evaluates True, a YES is exported. Otherwise a NO is exported.
y	Same as Y, except outputs a Y or N

To format output with condition statements

You can format the export output with condition statements by creating a series of IF statements with corresponding output values.

1. Select Utilities > Data Transport Utilities > Export Utility.
2. Select an Available Export and Search. Highlight an export Value.
3. Click Edit Calculations to display the Export Calculations Utility window.



4. Click Insert at the bottom of the window and click in the Name field to add a new name for the calculation.
5. Click Add to add a calculation or condition statement. In the Calculation field, type an equal sign followed by the calculation, for example, =Name.MEMBER_TYPE='CM'.
6. In the Output field, type a double quotation mark followed by the desired output value, for example "CO. In this example, every CM Member Type is exported as a CO value.

   You can add as many calculations as you need. The utility exports the result of the last True calculation. The result can be an iMIS field name, a constant, or an Omnis calculation.
7. Click OK to save the calculation. The calculation is now listed as an Available Calculation on the Export Calculations Utility window.

   To load record formats from other compatible software

To load records from compatible third-party software applications, the records must be comma- or tab-delimited. Each record to be loaded must contain the following fields in this exact sequence: Value, Length, Format, Calculation, and Search.

1. Open the Export Utility window: Utilities > Data Transport Utilities > Export Utility
2. Select an Available Export.
3. Click Edit.
4. Click Load to select the file to load into the export definition.
5. Click Open to start the import process.
6. Click OK to save.

Running an Export

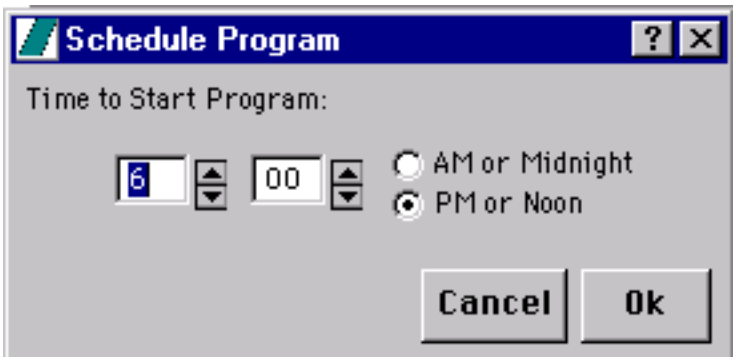
To run an export on demand

1. Select Utilities> Data Transport Utilities> Export Utility.
2. Select the Available Export to run.
3. Click Go.
4. When prompted to confirm the run, select Yes.

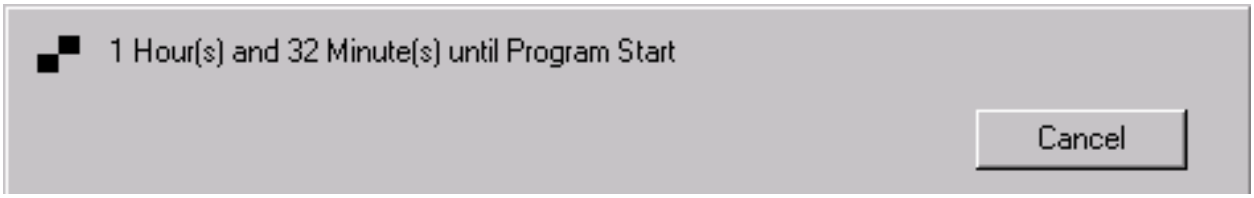
To schedule an export

The export should be scheduled after you have finished work for the day.

1. Open the Export Utility window: Utilities> Data Transport Utilities> Export Utility.
2. Click Schedule to open the Schedule Program window.



3. Select the time to start the export by using the up and down arrows.
4. Click Ok. The remaining time until program start displays.



Printing an Export Definition

You can print the export definition to a printer or to a file for use with a third-party software application.

To print an export definition to a printer

1. In File> Report Destination, set your report destination to Printer.
2. Open the Export Utility window and select the Available Export to print.
3. Click Go.
4. Click Print.

To print an export definition to a file

1. In File> Report Destination, set your report destination to Screen.
2. Open the Export Utility window; select the Available Export to print.
3. Click Export.
4. Enter the desired file path.

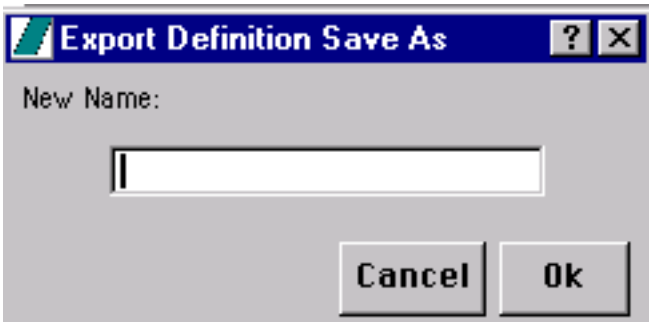
5. Click Save. The system exports the file to a print file (.prn) that can be read by compatible software applications.

Cloning an Export Definition

You can clone an existing export definition and make changes to create a new export definition.

To clone an export definition

1. Select Utilities> Data Transport Utilities> Export Utility.
2. Select an Available Export.
3. Click Save As on the Export Utility window to display the Export Definition Save As window.



4. Type the New Name for the export definition.
5. Click Ok to save the file with a new name.
6. Make changes in the new file and save.

Viewing the Activity Record

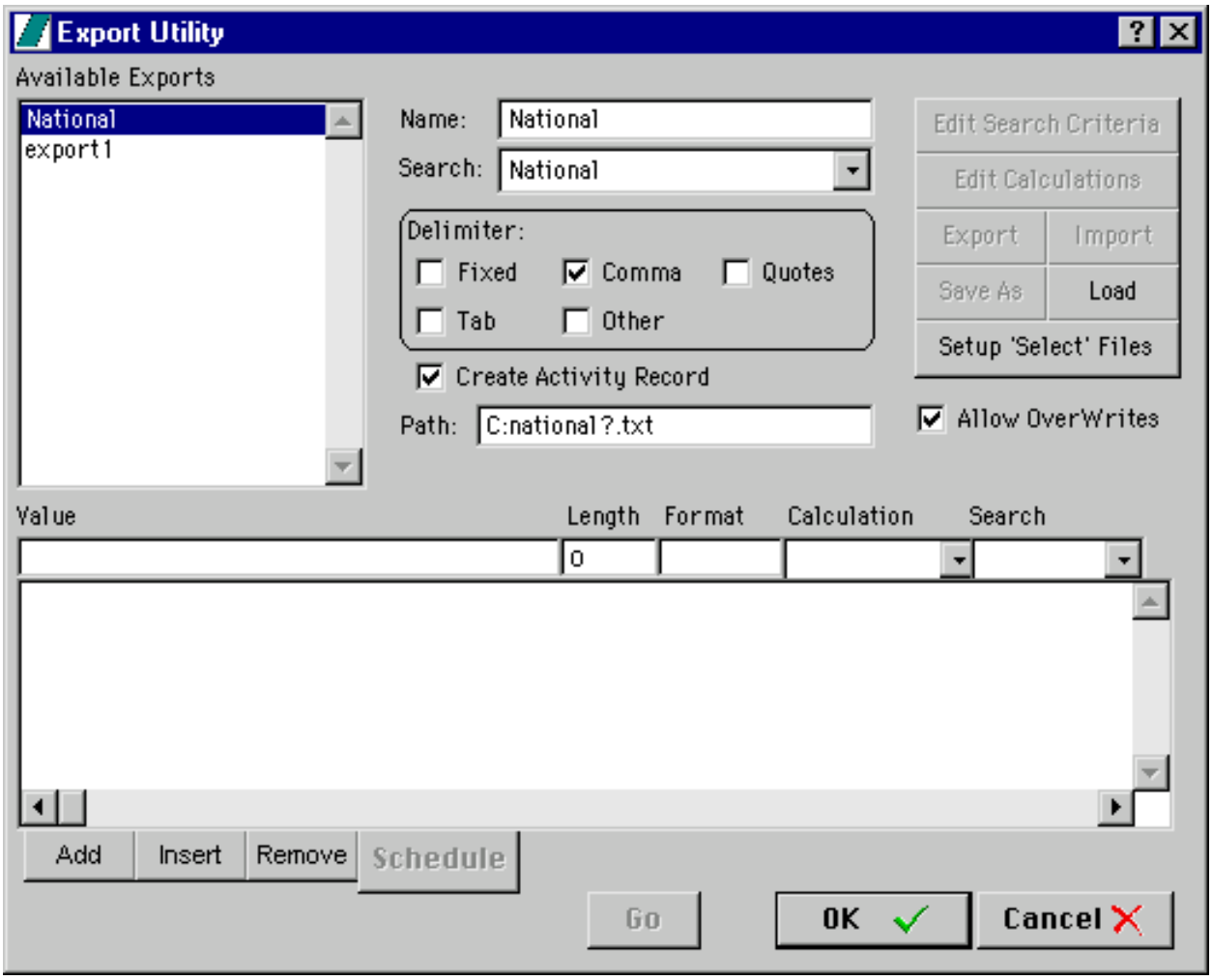
If the Create Activity Record option is selected in the Export Utility window, iMIS records the date the export record was created and saves a copy of each member's export record.

To view the activity record

1. Make sure the Name file is one of the Select Files in the export definition.

2. Create an activity named EXPORT in Membership> Utilities> Activity Types.
3. View the activity record in Membership> Standard Windows> Activity.

Export Utility window



Utilities> Data Transport Utilities> Export Utility

Available Exports

List of user-defined export definitions

Name

Name of selected export definition

Search

Name of user-defined search criteria

Delimiter

Character placed between fields

- Fixed – no delimiter
- Tab
- Comma
- Other – specifies other delimiter in the field that appears
- Quotes – encloses text in double quotes. This is helpful if a comma delimiter is required and some text fields contain commas. (Note: This field displays only when a delimiter other than Fixed is selected.)

Create Activity Record

Option to record each export record as a member activity in the iMIS database

Path

Directory and file name for the export file

Edit Search Criteria

Opens the Select Search Instructions window

Edit Calculations

Opens the Export Calculations Utility window

Export

Opens the Set print file name window to save the selected export definition to a file

Import

Opens the Select import file window to import a file containing export data formatting information

Save As

Saves a copy of the export definition with a different name

Load

Opens the Select import file window where you can select and insert a record template from compatible third-party software applications such as MS Excel™. Each record template loaded must contain the following fields in this exact sequence: Value, Length, Format, Calculation, and Search

Setup ‘Select’ Files

Opens the File Export Utility - Select Records window

Allow OverWrites

Option to allow the file to be overwritten each time you run the export definition

Value section

Specific formatting information is entered here.

Value

The constant value, iMIS field value, or Omnis calculation to be formatted

Length

User-defined length of the Value field

Format

Code to specify data format

Calculation

List of available calculations

Search

List of available search names

Add

Adds a new line in the Value text box

Insert

Inserts a line between existing lines in the Value text box

Remove

Removes the selected line in the Value text box

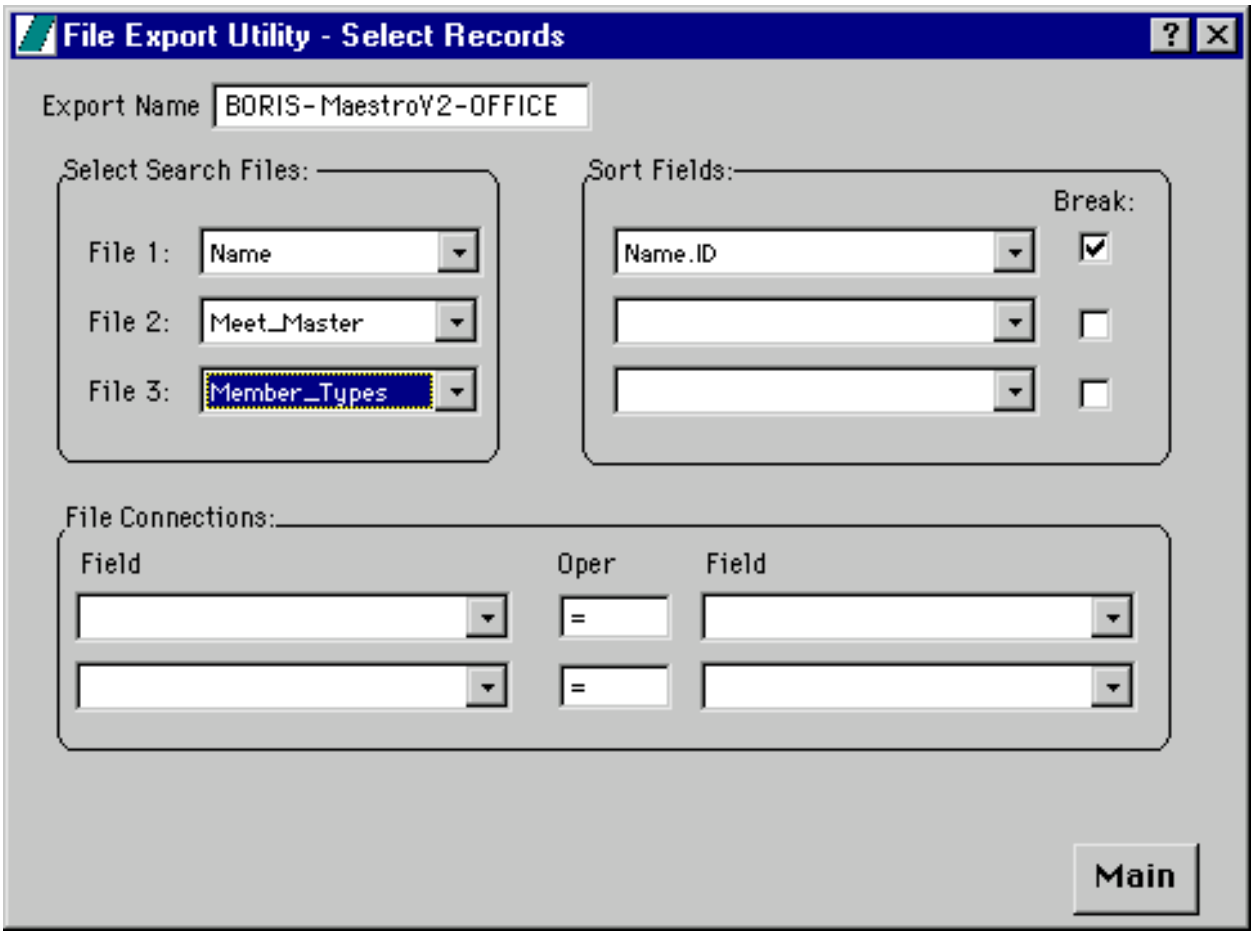
Schedule

Opens the Schedule Program window

Go

Runs the export

File Export Utility - Select Records window



Utilities> Data Transport Utilities> Export Utility, click Setup ‘Select’ Files

Export Name

User-defined export definition name

Select Search Files

Select File(s) for the export definition

Sort Fields

Defines sort order

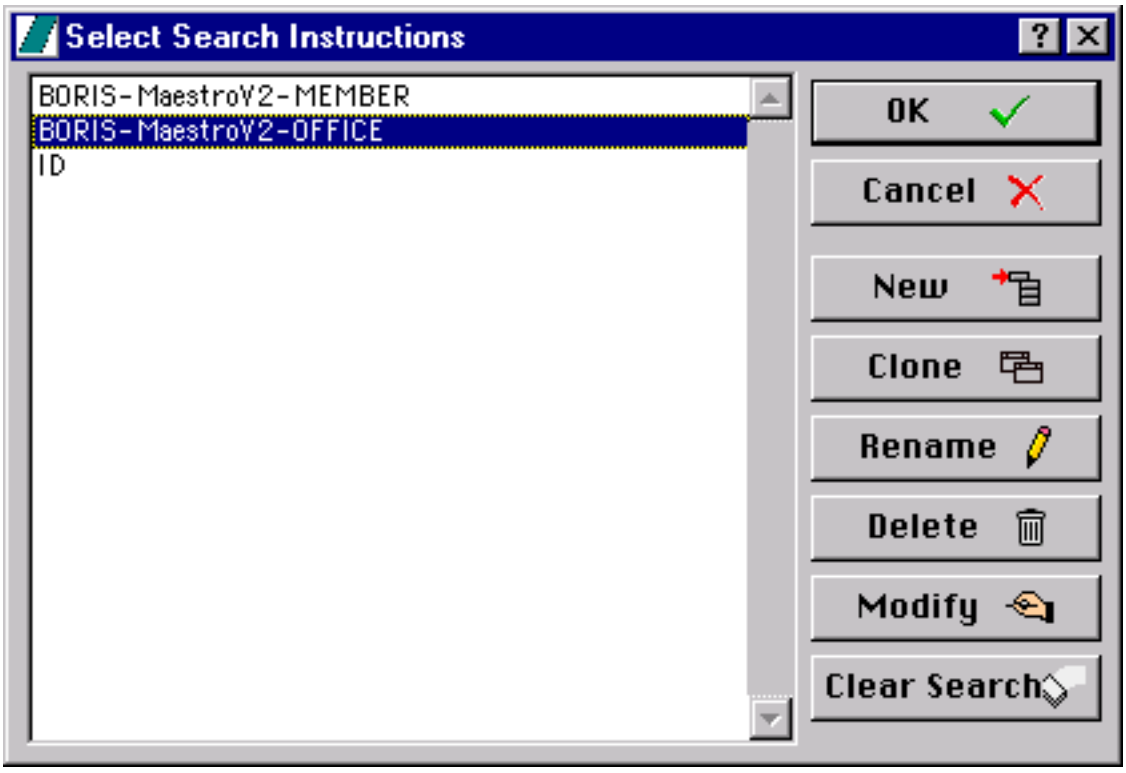
Break

Creates an export record whenever the value in the Sort field changes

File Connections

User-defined file/table joins

Select Search Instructions window for Export Utility



Utilities> Data Transport Utilities> Export Utility, click Edit Search Criteria

OK

Saves changes made to the search record

Cancel

Closes the Select Search Instructions window and returns to the Export Utility window

New

Opens the Search Instructions window to create search instructions

Clone

Makes a copy of the selected search instruction

Rename

Allows you to rename the selected search instruction

Delete

Deletes the selected search instructions

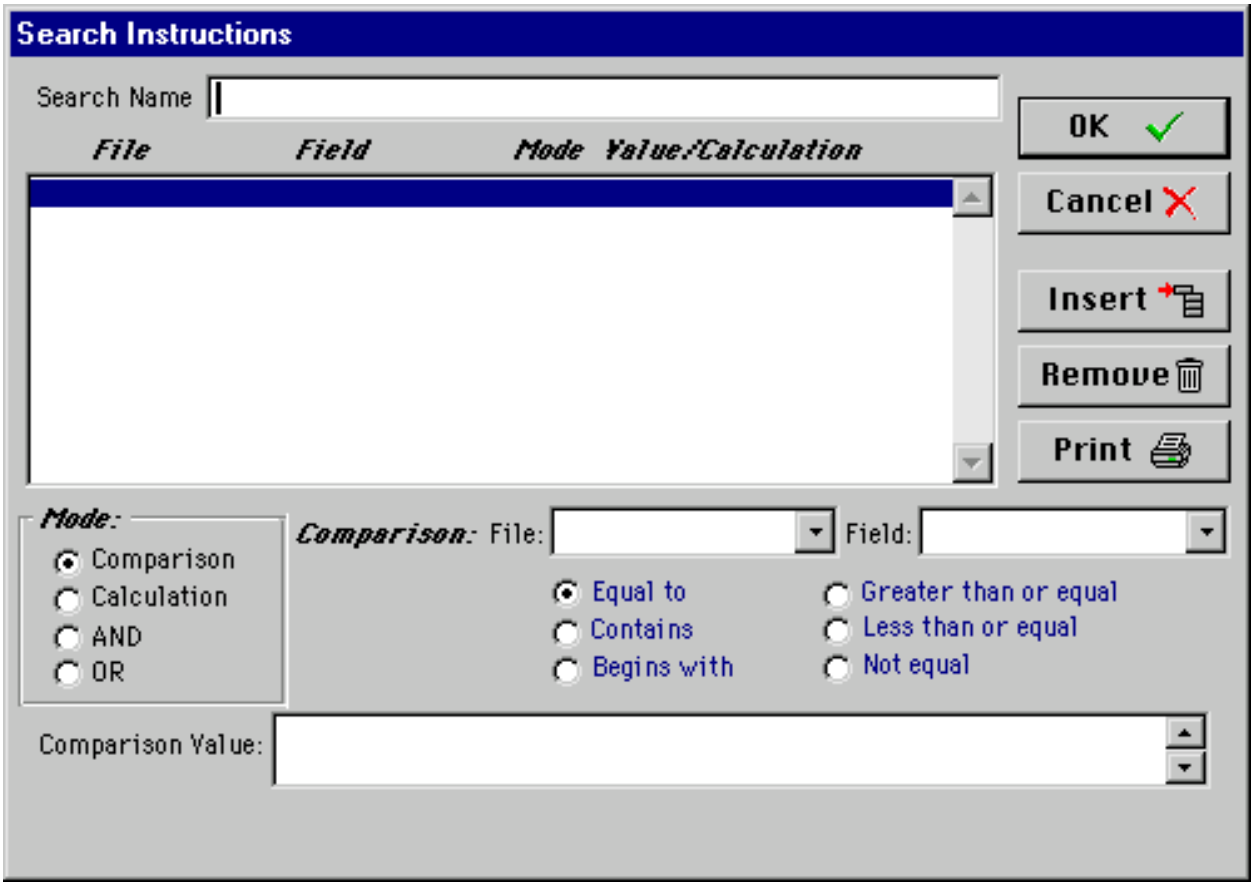
Modify

Opens the Search Instructions window to modify the search instructions

Clear Search

Clears the window of any search instructions and returns to the Export Utility window

Search Instructions window for Export Utility



Utilities> Data Transport Utilities> Export Utility, click Edit Search Criteria , click New

Search Name

User-defined name for search criteria

Mode

Allows you to export only the files/fields that meet defined criteria (Comparison, Calculation, AND, OR).

File

File (iMIS table) to be used for comparison

Field

Drop-down list of available fields in the selected file

Comparison Value

Value to be compared with selected field value

OK

Saves the search instructions

Cancel

Closes the window without saving new search instructions

Insert

Inserts a line in the Comparison Value text box

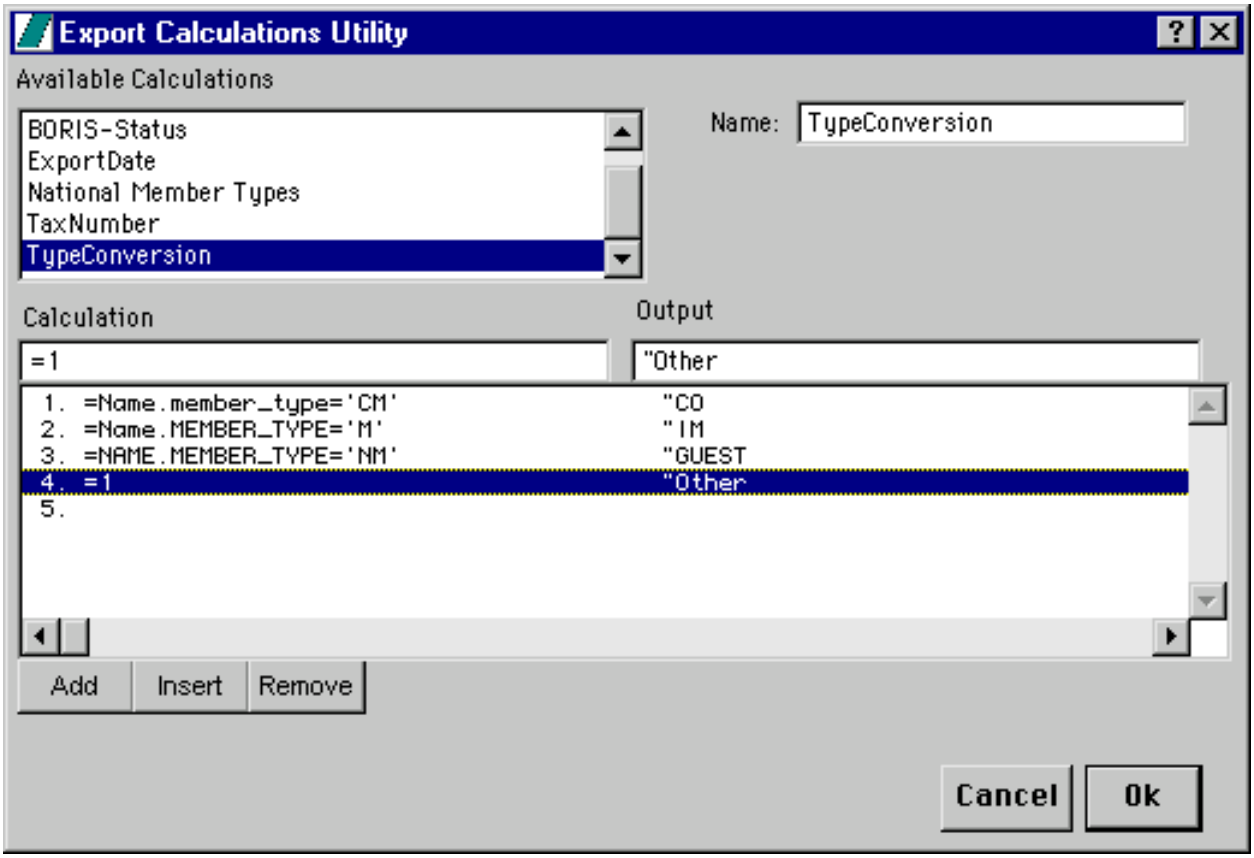
Remove

Deletes the selected line in the Comparison Value text box

Print

Prints a report of the comparison instructions

Export Calculations Utility window



Utilities> Data Transport Utilities> Export Utility, click Edit Calculations

Available Calculations

List of user-defined calculations

Name

Name of selected calculation

Calculation

Calculation or condition statement

Output

Desired output value when Calculation evaluates True

Add

Adds a line in the Calculation text box

Insert

Inserts a line between existing lines in the Calculation text box

Remove

Deletes the selected line in the Calculation text box

Cancel

Cancels editing of the calculation

Ok

Saves the calculation

iMIS Table/Field Formats

The primary table (file) in iMIS is the Name table, which is the internal system label for the member/contact file. It contains name, address, categorization, and demographic information for each member/contact that you track through iMIS. All iMIS modules interact with and retrieve information from this table.

The other main table that supports membership processing is the general purpose Activity table. It contains records that track historical and participation details, such as meetings attendance, committee service, dues payments, product purchases, correspondence sent, and calls logged. The information in this table is commonly accessed for analysis or marketing reasons.

Another table you may want to use is the Subscription table, which tracks all dues and subscription line items billed and collected.

Referencing the fields

When you want to access or reference a field in iMIS, you can often select from a field list. To export iMIS fields, format the field names exactly, including precise capitalization and punctuation. Table (file) names appear with initial capitals (with underscores as needed), field names appear in all capitals (with underscores as needed), and the two parts are connected with a period.

iMIS files to use for export

The following are the recommended iMIS tables to use to export data:

- Name
- Activity
- Subscription
- Orders
- Order_Lines
- Trans
- Invoice
- Invoice_Lines

Avoid using other iMIS tables for export, because data in the other tables may not be easily linked to the primary tables.

Defining Joins for Select Files

Often, you will require data from more than one iMIS table for export. For example, you may need FULL_NAME and COMPANY from the Name table and TYPE='DUES' and BALANCE from the Subscription table. Since there is no membership data in the Subscription table, you must access the Name table. To use data from two or more tables, you must join them.

To join files (tables) is to specify which fields are equivalent so the files can relate to each other correctly, record by record. In effect, joining glues the files together for the export process. The most common joins in iMIS center on member ID numbers. A join across three tables might be:

Name.ID = Activity.ID

Name.ID = Subscription.ID

Ordering the Joins

The order of your table joins can impact performance substantially. Although the optimal order depends on the report, the key iMIS joins are:

Name.ID = Activity.ID

Name.ID = Subscription.ID

Name.ID = Invoice.BT_ID

Orders.ORDER_NUMBER = Order_Lines.ORDER_NUMBER

Product.PRODUCT_CODE = Order_Lines.PRODUCT_CODE

Name.ID = Orders.BT_ID

Troubleshooting Joins

If you experience problems such as too much data being returned, multiple records being returned, or endless data retrieval, you may not have joined the files correctly.

If you are experiencing performance problems with a report that uses a join, try these fixes:

- Switch the order of the files.
- Make sure that the files included in the join are Select Files in the export definition.

Financial Importers

Orders Importer

iMIS Orders allows you to import third-party orders using the iMIS Orders Importer. The iMIS Orders Importer is designed to import and process order data en masse from external tab- or comma-delimited files. Importing orders prevents you from having to enter large amounts of order data manually.

Caution! Only products with an Active status can be imported. If an order line's product does not have an Active status, the Importer will not import the order line, and the order line will be inserted into an error log along with any other order line failures. No other order lines will be affected; the Importer will process the order's remaining order lines.

Using the iMIS Orders Importer

To import and process order data from external files, you must be licensed for the iMIS Orders Importer.

Formatting import data

Order data is imported in the form of tab- or comma-delimited files, with various types of records allowed in a single stream.

Individual orders are defined by an order header record (OH) and its subordinate records. Subordinate record types include order address (OA), order payment (OP), and order line (OL). If you are using batch control, a batch header record (BH) can be used to create a new batch.

All subordinate records must follow the order header record for individual orders. For an imported order to be valid, you must define an order header record and at least one order line record. Order payment and order address records are optional but, if they are used, they must be placed between the order header and order line records.

Batch Header Record (BH)

If you are going to use a BH record to create a new batch, the BH record must be the first record in the import file.

1	Record Type	BH	Use a batch header record to create a new batch during the import process. If batch control is not enabled, the BH record is not needed. If a batch is already open in iMIS at the time of import, a BH record is not needed.
2	Batch Number	Char (10) Uppercase	
3	Batch Date	Date	Date of batch
4	Batch Description	Char (60)	

5	Control Count	Numeric	Optional field
6	Control Amount	Money	Total amount of the batch payments
7	Cash Account Code	Char (10) Uppercase	Code assigned through the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts); indicates the cash account where the funds are deposited.

Order Header Record (OH)

1	Record Type	OH	Required - Always OH
2	Batch Number	Char (10) Uppercase	If batch control is disabled in AR/Cash, the batch number field is ignored, and the current batch is cleared. If batch control is enabled, a batch number starting with an asterisk (*) is inserted automatically and becomes the current batch for subsequent transactions. If the batch already exists and is open, it becomes the current batch. If this field contains only an asterisk (*), the batch is inserted automatically using a system-assigned identifier. If an 'IMPORT' cash account is set up, the following also is true: • Batch entity = IMPORT entity • Batch cash account = IMPORT • Batch GL account = IMPORT GL account

			If an 'IMPORT' cash account is not set up, the following is true: • Batch entity = Default system entity • Batch cash account = empty • Batch GL account = Default system entity If the Batch Number field is left empty, the current batch is used. Batch numbers that are not prefixed with an asterisk (*) must already exist in the iMIS database. A BH record placed anywhere before the OH record in the input stream may be used to create the batch.
3	Order Number	Float	It is recommended that this field be left blank or contain an asterisk (*), which auto-assigns an identifier. If an order number is specified, the order will be rejected if the order number already exists in the iMIS database.
4	Order Type	Char (10) Uppercase	Required: Must be a valid order type as defined on the Set up order types window.
5	Order Date	Datetime	Optional: If not used, the system or batch date will be the order date.
6	Bill to Id	Char (10)	Required: Must be a valid iMIS Customer ID.
7	Ship to ID	Char (10)	Optional: If not used, the 'Ship to' ID will be the same as the 'Bill to' ID. If used, must be a valid iMIS Customer ID. Use an asterisk (*) to create new customer records. If an asterisk is used, the OA record is required.

8	Invoice Number	Int	Optional: Valid for credit and/or debit Order Types only. This field is ignored for all other Order Types.
9	Number Lines	Int	Optional: If specified, this is verified against the number of order line records (OL) read from the import file.
10	Shipping Method	Char (10)	Optional: If specified, must be a valid shipping method from the SHIP_METHOD general validation table. Default: Default Shipping Method defined on the Add-on Charges window.
11	Freight	Money	Optional: If specified, overrides Auto Freight Calculation.
12	Handling	Money	Optional: If specified, overrides Auto Handling Calculation.
13	Taxation Authority	Char (15)	Optional: If specified, overrides Taxation Authority.
14	Terms Code	Char (5) Uppercase	Optional: If specified, must be a valid terms code from the Terms Table and will override the Terms Code.
15	Source Code	Char (10) Uppercase	Optional: If specified, must be a valid source code from the SOURCE_CODE general validation table and will override the FSI default.
16	Salesperson	Char (15)	Optional
17	Priority	Int	Optional
18	Discount Rate	Numeric	Optional: If specified, use a whole number for the discount rate percentage (no decimals or fractions).
19	Customer Reference	Char (40)	Optional: If specified, value will display in the Purchase Order field.
20	Auto Calc Freight	Bit	Optional: Only used to turn the option OFF.
21	Auto Calc	Bit	Optional: Only used to turn the option OFF.

	Handling		
22	Auto Calc Restocking	Bit	Optional: Only used to turn the option OFF.
23	Notes	Char (32000)	Optional

Order Address Record (OA)

An OA record is required if the 'Ship to' ID is being created by the import file. Otherwise, you can use an OA record to override the 'Ship to' Address information on an order.

An OA record must follow the applicable OH record immediately. Fields that are not specified in the OA record are populated from the 'Ship to' customer's address records.

Note: A single space placed in an OA field blanks out that field on an order.

1	Record Type	OA	Required: Always OA
2	Title	Char (80)	Optional
3	Company	Char (80)	Optional
4	Prefix	Char (10)	Optional
5	First Name	Char (20)	Optional
6	Middle Name	Char (20)	Optional
7	Last Name	Char (30)	Optional
8	Suffix	Char (10)	Optional
9	Address 1	Char (40)	Optional
10	Address 2	Char (40)	Optional
11	Address 3	Char (40)	Optional
12	City	Char (20)	Optional
13	State/Province	Char (15)	Optional
14	Zip	Char (10)	Optional
15	Country	Char (25)	Optional

16	Phone	Char (25)	Optional
17	Fax	Char (25)	Optional

Order Payment Record (OP)

You cannot make multiple payments when using the Orders Importer.

1	Record Type	OP	Required: Always OP
2	Amount	Money	Required
3	Check Number or Credit Card Type	Char (10) Uppercase	Required: If specifying a Credit Card, the credit card must be a valid credit card type from the Cash Account table.
4	Credit Card Number	Char (25)	Required if using a credit card. Allowable length varies by credit card.
5	CC Expiration Date	Char (10)	Required if using a credit card. Format is MM/YY.
6	Credit Card Holder	Char (30)	Required if using a credit card.
7	Credit Card Authorization Code	Char (10)	Optional

Order Line Record (OL)

Add OL records in the order in which you want them to display in the transaction field. The total number of order lines following an OH record is verified against the number of lines specified in the header.

1	Record Type	OL	Required: Always OL
2	Product	Char	Optional: If not used, the Description becomes a required

	Code	(31)	field. If specified, must exist in the Product table.
3	Product Description	Char (225)	Required if product code is left blank. Optional if product code is used. Used to override the product description for this order.
4	Quantity Ordered	Numeric	Optional
5	Unit Price	Money	Optional: Used to override the unit price in the Product table.
6	Taxable	Boolean	Optional: Used to override the product taxation status.
7	Commission Rate	Numeric	Optional: Used to override the commission rate contained in the Product table. (Do not express the commission rate percentage as a decimal or fraction. Use a whole number.)
8	Discount	Numeric	Optional: Used to enter product-level discounts. Product-level discounts override order-level discounts for product line-items.
9	Location	Char (10)	Optional: Used to enter a warehouse location when using multiple warehouses.
10	Bin	Char (10)	Optional: Used to enter a storage bin within a warehouse.
11	UF_1	Char (30)	Optional: Used to enter and define specific order information for products.
12	UF_2		
13	UF_3		
14	UF_4		

Importing orders

Order data is imported in the form of tab- or comma-delimited files. Before using the Orders Importer to import your files, be sure to back up your iMIS database. If your import

fails, you can restore your original data from the backup copy; otherwise, you must manually delete each transaction in the imported batch.

When importing orders, you need to be aware of the following:

Product status codes

Only products with an Active status can be imported. If an order line's product does not have an Active status, the Importer will not import the order line, and the order line will be inserted into an error log along with any other order line failures. No other order lines will be affected; the Importer will process the order's remaining order lines.

Payments

The iMIS Orders Importer does not support entering multiple payments. Only single payments can be imported.

Freight charges

If you want freight charges to calculate automatically for an imported order, you must enable the Automatic Calculation of Freight Charge and Freight by Weight options on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges). The Orders Importer does not support the Freight by Total Value Ordered or Freight by Total Quantity Ordered options.

Multiple warehouses

The iMIS Orders Importer supports Multi-Warehouses when the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

If the Enable Multi-Warehouses option is disabled, the Importer will ignore any warehouse location entered when an order is imported. The Importer then determines whether the product is a stock item:

- Product is not a stock item - Order_Lines.LOCATION is left blank.
- Product is a stock item - Order_Lines.LOCATION is populated with Default.

If the Enable Multi-Warehouses option is enabled, the Importer first verifies whether the product is a stock item:

- Product is not a stock item - Order_Lines.LOCATION is left blank.
- Product is a stock item - The Importer verifies whether Order_Lines.LOCATION is populated:
- Order_Lines.LOCATION is not populated - The Importer populates Order_Lines.LOCATION with the Default Warehouse defined on the Inventory System Setup window.
- Order_Lines.LOCATION is populated - The Importer uses the defined warehouse location. If the defined warehouse location does not have sufficient products in inventory, the import will fail, and an error message will be generated.

To import orders

Only products with an Active status can be imported.

1. Create the file(s) that you want to import in either a tab- or comma-delimited file format. After creating a file, you can import it into iMIS. For more information, refer to Formatting import data.
2. From AR/Cash, select Enter and edit transactions > Import transactions to open the Select import file window.
3. Find and select the tab- or comma-delimited file that you want to import.
4. Click Open. A system message will indicate that the transactions are processing.
5. If there are any problems while importing the file, an Order Import Error Report will print:

- A Warning message indicates that a problem exists with an order but that the file was still imported.
- A Fatal Error message indicates that the file was not imported. If an import does fail, check the import file for stray spaces, missing tabs, or other errors.

Viewing imported orders

You have several options when viewing imported orders. You can view them in the Enter and edit orders window just as with orders entered manually, or you can view them in reports.

If you want to edit an imported order, you will need to open the order in the Enter and edit orders window.

If you want to view your imported orders in reports, whether or not you enable batch control when importing orders determines which reports you use:

- Batch Control Disabled - If batch control is not enabled, you can view the imported orders on the Order Detail Report (from Orders, select Generate reports, select Order Status, select Order Detail Report, click Run, select the date range, and click OK).
- Batch Control Enabled - If batch control is enabled, you can view the imported orders on the following reports:
- Order Detail Report by Batch report (from Orders, select Generate reports, select Order Status, select Order Detail Report by Batch, click Run, select the batch, and click OK)
- Batch Transaction Listing report (from AR/Cash, select Manage batches, select the open import batch, and click Print Selected) - Lists the batch's prepaid orders
- Batch Posting Listing report (from AR/Cash, select Manage batches, select the open import batch, and click Post Selected)

Billing Payment Importer

iMIS Billing Payment Importer provides you with the ability to import financial transactions into iMIS, also referred to as “lockbox processing.” The importer is designed to import and process mass payment data from an external import file, allowing you to avoid entering this data manually, transaction by transaction. This module helps you if your payments are received and recorded by an outside organization, such as a bank (lockbox) or an affiliated organization, if this organization can supply the payment data in a usable electronic form.

This module requires at least two data elements to be resident in your import files: the payment amount and the customer ID (either the primary ID or the Major Key of each customer who has paid). For example, if you will be receiving data from an affiliated organization, such as the national or state organization and the receiving organization does not know the customer ID, be sure to have an organization-wide common identifier (such as a certificate number) in the data. You must maintain this common identifier in the Major Key field.

The benefits of using this interface instead of simply importing the data include the following:

- Provides a single interface for iMIS Billing payment transactions
- Uses the payment records to create dues payment transactions, which debit cash and credit income or deferred income
- Automatically applies each customer payment record amount to that customer's open balances until those balances are closed
- Any residual payment amount creates open credit balances, which you can refund or apply to future sales

The payment data that is imported will only be applied to a line item that already exists on the customer's Billing tab and has an outstanding positive balance. Importing payment data will not create new line items nor apply an amount against a line item that has a zero or negative balance. If the imported payment exceeds the balance, an overpayment will be applied to the line item. If the line item does not exist, an open AR credit invoice will be created for the payment amount.

To enable the Billing Payment Importer

As with all iMIS modules, you must have this system enabled on the iMIS System Setup level. Refer to your service provider for more details.

To format billing data for import

The transaction format is tab- or comma-delimited input, with various types of records allowed in a single stream. The import file must contain a single batch header record, followed by any number of cash payment records.

Note: You cannot use the Dues Importer for accrual Dues billing cycle. You must use the AR Importer for accrual dues billing. To use the AR Importer, the System field (third field) under the Cash Payment Record should be AR. Make sure to insert the Invoice Number (sixth field) under the Cash Payment Record.

The major transaction formats include the following:

All Records

1	Record Type		Identifies the type of record
2	Batch Number	10 chars, all upper case	

Batch Header

1	Record Type	BH	Always “BH”
2	Batch Number	10 chars, all upper case	
3	Batch Date	Date	Date of batch
4	Batch Description	60 chars	
5	Control Count	Numeric	Optional
6	Control Amount	Monetary	Total of the batch of payments
7	Cash	10 chars,	Code assigned through AR/Cash> Set up tables > Cash

Account Code	all upper case	accounts; indicates the cash account where the funds were deposited

Cash Payment Record

1	Record Type	PAY	Always “PAY”
2	Batch Number	10 chars, all upper case	Optional; if blank, defaults to batch header's batch number
3	System	DUES	
4	Member ID	10 chars, customer ID	Can substitute Major Key, if prefixed with * (asterisk)
5	Date	Date	Optional; if blank, defaults to batch header date
6	Product Code	Character	Optional; payments can be applied to specific Product Codes by including the Product Code in this field
7	Amount	Individual payment amount	Total amount of the check or credit card payment
8	Check/CCType	Check # or credit card type	Optional
9	CCNumber	Credit card #	Optional
10	CCExp	Credit card exp	Optional
11	Name On CC	Name on credit card	Optional
12	CCAuthorize	Credit card authorization code	Optional

13	Name	60 chars for audit trail	Optional but important. Will print on the transaction report to identify the customer/subscriber.
14	Comment	255 chars	Optional but important. Will print on the transaction report and related inquiries to explain the transaction, such as “Dues Payment” or “Subscription Payment."

Example billing import file

In the following import file example, two cash payment records follow the batch header line. Make sure that your Cash Account code exactly matches the setting on the Set up cash accounts window.

BH,DUES030802,3/08/02,Dues Payments for 3/08/02,,195.00,CASH

PAY,DUES030802,DUES,152,3/08/02,,95.00,1234,,,,Marcie Farmhaven,,,Dues Payment

PAY,DUES030801,DUES,111,3/08/02,,100.00,VISA,4610-8904-4005-4568,9/02,,C98084,Richard Harris,Dues Payment

Note: If your import fails, check your import file for stray spaces, missing tabs, and so forth.

To review history before importing billing transactions

Before you introduce third-party transactions into your iMIS data file, view the relevant payment history for items such as dues for a sample customer (one who will be affected by the incoming data).

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Billing tab.
4. Click the History or Current button located at the bottom of the Billing tab. This is where your imported transactions should appear after the import process.

Note: You can review the outstanding balances by printing the Open Items by Name report.

To perform the billing import

Caution! Back up your database. Before performing the import, it is very important that you make a current backup of your iMIS database. If your import is in error, you can restore your database from the backup copy; otherwise, you must manually delete each transaction in the imported batch.

1. From AR/Cash, select Enter and edit transactions> Import transactions to open the Select import file window.
2. Select the tab- or comma-delimited file that you prepared.

   Note: If a message is displayed indicating that the Cash Account code does not exist, check that the name of the Cash Account code in your import file matches the one in your iMIS-system Cash Account Table on the Set up cash accounts window.
3. When complete, open the Manage batches window.
4. To review the results of the import, select the open import batch on the Open Batches window and click Print Selected.
5. (optional) To finalize the transactions, select the open import batch on the Open Batches window and click Post Selected.

   To verify the billing import

   To verify that your transactions have correctly posted to your iMIS data file, view the relevant payment history again for your sample customer:

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the Billing tab.
4. Click History and compare the contents of the History view, where the imported transactions should appear. Note whether the Paid Thru date advanced.

To view open credits from a billing import

If the payment amount imported was larger than the total outstanding balance for a customer, the amount of the overpayment automatically creates an open credit. To view overpayments by an individual:

1. From Customers, select Manage customers to open the Manage customers window.
2. Find the customer's record.
3. Select the AR/Cash tab.

AR Payment Importer

The AR Importer provides you with the ability to import financial transactions into iMIS, also referred to as “lockbox processing.” The AR Importer is designed to import and process mass AR payment data from an external import file, allowing you to avoid entering this data manually, transaction by transaction. AR Importer helps you if your AR payments are received and recorded by an outside organization, such as a bank (lockbox) or an affiliated association, if this organization can supply the payment data in a usable electronic form.

Note: This module requires that you use the batch control feature for processing financial transactions.

This module requires at least two data elements to be resident in your import files: the customer ID (either the primary ID or the Major Key of each customer who has paid), and the payment amount. For example, if you will be receiving data from an affiliated organization, such as the national or state association, and the receiving organization does not know the customer ID, you can use an organization-wide common identifier (such as a certificate number). You must maintain this common identifier in the Major Key field.

In addition to the customer ID (primary ID or Major Key) and payment amount, the invoice number is also required if the Cash Application Auto Apply option is not enabled (from AR/Cash, select Set up module).

The benefits of using this interface instead of simply importing the data include the following:

- Provides a single interface for iMIS AR payment transactions
- Uses the payment records to create AR payment transactions, which debit cash and credit income or deferred income
- Automatically applies each customer payment record amount to that customer's open AR balances until those balances are closed
- Any residual payment amount creates open credit balances, which you can refund or apply to future sales

The payment data that is imported will only be applied to a line item that already exists on the customer AR/Cash tab and has an outstanding positive balance. Importing payment data will not create new line items or apply an amount against a line item that has a zero or negative balance. If the imported payment exceeds the balance, an overpayment will be applied to the line item. If the line item does not exist, an open AR credit invoice will be created for the payment amount.

Using iMIS AR Importer

To implement the AR Importer:

1. Make sure you are licensed for AR Importer.
2. Format AR data for import.
3. Perform the import.
4. Verify the import.

To enable the iMIS AR Importer module

As with all iMIS modules, you must have this system enabled on the iMIS System Setup level. If necessary, open the System Setup window (select File > System Setup) and edit your iMIS licensing to enable the iMIS AR Importer.

To format AR data for import

The transaction format is tab- or comma-delimited input, with various types of records allowed in a single stream. The import file must contain a single batch header record, followed by any number of cash payment records. There should not be any empty lines between record entries.

Note: You can use the AR Importer for accrual dues billing.

The major transaction formats include the following:

All records

1	Record Type		Identifies the type of record
2	Batch Number	10 chars, all upper case	

Batch header

1	Record Type	BH	Always "BH"
2	Batch Number	10 chars, all upper case	
3	Batch Date	Date	Date of batch (mm/dd/yy)
4	Batch Description	60 chars	
5	Control Count	Numeric	Optional
6	Control Amount	Monetary	Total of the batch of payments
7	Cash Account Code	10 chars, all upper case	Code assigned through the Set up cash accounts window. Indicates the cash account into which the funds were deposited.

Cash payment record

1	Record Type	PAY	Always "PAY"
2	Batch Number	10 chars, all upper case	Optional. If blank, defaults to batch header's batch number.
3	System	AR	
4	Customer ID	10 chars, customer ID	Can substitute with Major Key, if prefixed with * (asterisk)
5	Date	Date	Optional. If blank, defaults to batch header date.
6	Invoice	Alphanumeric	The invoice number. This field is required if the Auto Apply option is not enabled in the AR/Cash Set up module window.
7	Amount	Individual payment amount	Total amount of the check or credit card payment. Do not enter a $ (dollar sign).
8	Check/CCType	Check number or credit card type	Optional
9	CCNumber	Credit card number	Optional
10	CCExp	Credit card expiration date	Optional
11	Name on CC	Name on credit card	Optional
12	CCAuthorize	Credit card authorization code	Optional
13	Name	60 chars for audit trail	Optional but important. This value is printed on the transaction report to identify the customer.
14	Comment	255 chars	Optional but important. This value is printed on the

transaction report and related inquiries to explain the transaction, such as "Dues Payment" or "Subscription Payment".

Example AR Import File

In the following example import file, one cash payment record follows the batch header line. Make sure that your cash account code exactly matches the setting on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts).

BH,AR051502,05/15/02,AR Payments for 5/15/02,,265.00,CASH

PAY,,AR,105,05/15/02,,265.00,1234,,,,,Carol Hamilton,AR Payment

Note: If your import fails, check your import file for stray spaces, missing tabs or commas, empty lines, proper date format, and so forth.

To review history before importing AR transactions

Before you introduce third-party transactions into your iMIS data file, view the relevant payment history for items such as AR payments for a sample customer (one who will be affected by the incoming data).

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find to select the customer record.
3. Select the AR/Cash tab to view the customer's AR/Cash information.
4. Make note of the contents of the AR/Cash tab. The imported transactions should be displayed in the AR/Cash tab after you perform the import procedure.

   Note: You can review the outstanding AR balances by printing an A/R Statements report.

   To perform the AR import

Before performing the import, it is very important that you make a current backup of your iMIS database. If your import is in error, you can restore your database from the backup copy; otherwise, you must manually delete each transaction in the imported batch.

Caution! Back up your database.

1. From AR/Cash, select Enter and edit transactions> Import transactions to open the Select import file window.
2. Select the tab- or comma-delimited file that you prepared and click Open.

   Note: If you receive an error saying the Cash Account Code does not exist, click OK and check that the name of the Cash Account code in your import file matches the one in your iMIS-system Cash Account Table on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts).
3. When the import is complete, from AR/Cash, select Manage batches to open the Manage batches window.
4. To review the results of the import, select the open import batch on the Manage batches window, and click Print Selected.
5. (optional) To finalize the imported transactions, select the open import batch on the Manage batches window, and click Post Selected.

   To verify the AR import

   To verify that your transactions have correctly posted to your iMIS data file, view the relevant AR/Cash information again for your sample customer.

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find to locate the customer's record.
3. Select the AR/Cash tab to view the customer's AR/Cash information. The new AR payment should be included.

   To view open credits from an AR import

If the payment amount imported was larger than the total outstanding balance for a customer, the amount of the overpayment automatically creates an open credit. To view overpayments by an individual, perform the following steps:

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find and enter the customer ID, then click OK.
3. Select the AR/Cash tab to view the customer's AR/Cash information.
4. Double-click the entry with the overpayment to open the Transaction Ledger window.

Intelligent Query Architect (IQA)

The Intelligent Query Architect is the foundation for searches, lists, and data for reporting throughout iMIS.

Understanding IQA

Intelligent Query Architect (IQA) is a query-building tool that extracts data from the iMIS database. IQA simplifies query-building tasks by providing a user-friendly interface that makes it easy for a user with limited SQL experience to build queries and reports.

Use IQA to:

- Display targeted information to users, such as a list of committee members, participation lists on contact account pages, and lists of payments and invoices
- Create reports with the Microsoft SQL Server Reporting Service (SSRS)
- Present queries to users with runtime prompts
- Allow users to create ad hoc, dynamic reports
- Organize data for mailings and letter merges
- Gather data for business analysis

To increase efficiency, you can copy and combine existing queries to define new ones. Users can access IQA queries through various locations within iMIS, but role-based security settings control access to queries and the underlying data.

Key Features: IQA

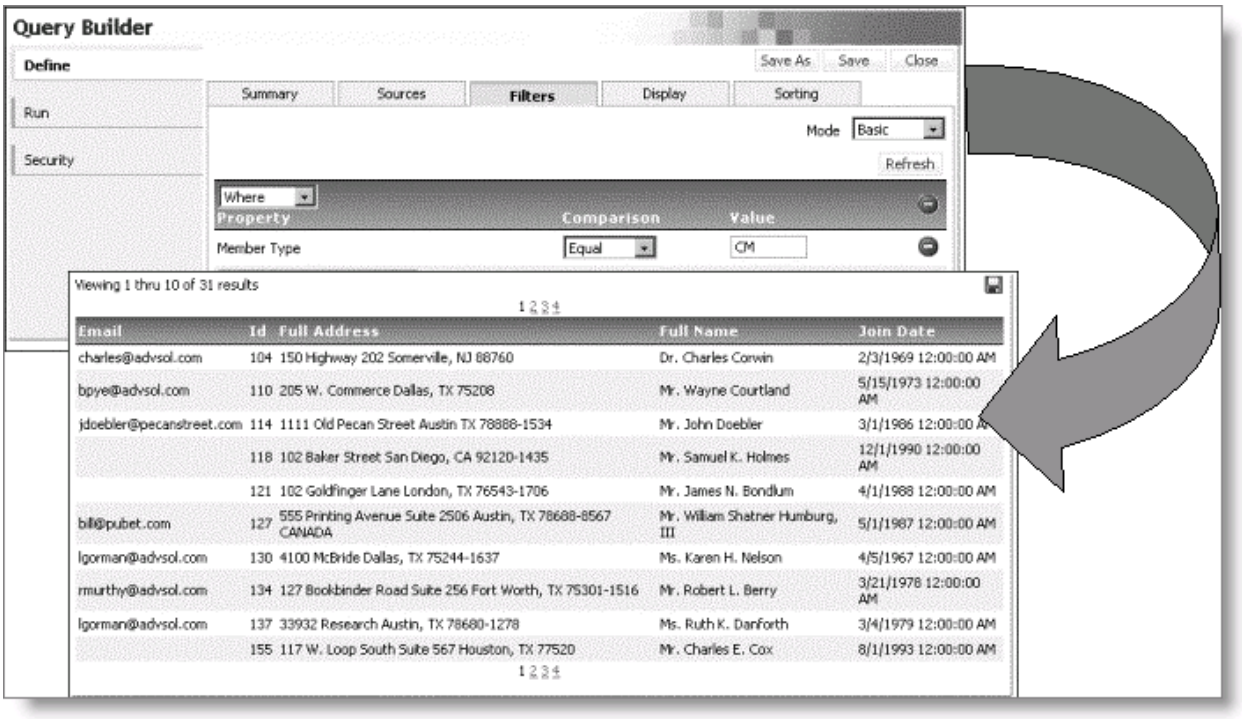
IQA allows you to specify many data display options, including:

- Fields displayed from one or more business objects, including the ability to display concatenated or calculated fields.
- The sort order for displaying rows in a list.
- The selection criteria to locate rows to display, including the ability to prompt the user for runtime criteria. For example, you can specify that the user can enter an invoice number to locate an invoice.
- Which page to display if it is appropriate to show additional information for the record being viewed. For example, you can specify that the Invoice Detail window should open if a user clicks on an invoice number link in the list.

And you can design a query once and use it in many locations throughout the system.

Task by role: IQA

The tasks a user performs depend on their security authorization, which is role-based. Use the security controls and display options to make sure the correct query results and the access to them are appropriate for each type of user. Typically, an administrator would set permissions and security, an authorized user would define the query, and a lower-level user would run and export the available queries.



Example of a query definition and its results

Understanding iMIS queries

Queries are a central concept in iMIS. They are used to extract data from the database, but they also drive many application elements. For example, queries are used as the source for many user interface elements, especially for the display of data to users. Queries are also used as sources for reports.

The data sources for queries can be other queries or iMIS Business Objects. Queries can be simple, using a single source; or they can be complex, with multiple sources and different types of joins. For example, a simple query can gather and display all contacts from the province of Ontario. A complex query might organize donors by giving levels and frequency of gifts to generate a detailed report.

Query definitions are stored in the Document System. Access to queries are granted through security settings.

Outputs

You can generate a variety of outputs from IQA:

- Webpage display – Queries can deliver results in a quick list view (Run) or in a formatted webpage that enhances your organization's website.
- Mail merge file
- Reports – Combine query results with report formats in Microsoft SQL Server Reporting Services (SSRS) to create, access, modify, and share reports.
- File

Tour: Intelligent Query Architect

You must be have the SysAdmin role to perform this quick tour.

1. Select Tools > Intelligent Query Architect.

   The Intelligent query architect page appears displaying the full Document System folder tree, filtered to display only query objects.
2. Navigate to Common > Examples > Query Example.
3. In the Query Example folder contents area, select Example Query. Click Edit.

   The IQA page appears.
4. Click the Sources tab. Use the Mode dropdown list to toggle between Advanced mode and Basic mode.

   Notice how the Advanced mode exposes more functionality.
5. Explore the remaining tabs and task list items.

Concepts and Terms: IQA

Business objects are collections of self-contained data that represents an entity or process, and shields the physical data. You can use business objects to build the query definition, or you can base the query on an existing query.

Use joins to specify which fields are equivalent so the files can relate to each other correctly. The most common joins in iMIS center on member ID numbers.

Store the query in the Document System, iMIS's server-side file system.

Define the results display with iParts, web part controls that allow you to create and edit website content.

Getting Started with IQA

The steps to set up and use IQA include:

1. Administrator defines security permissions and global settings for queries.
2. An authorized user builds the query definition using Business Object data and/or other queries, with appropriate joins between the data. The user defines the results display or report format and stores the query in the Document System.
3. An end user selects a query and supplies any required parameters. The user runs the query and views the results in a webpage or a report.

Administering IQA

Accessing IQA

If you are an administrator or a user who is allowed to set up queries, the Tools tab displays. Select Tools > Intelligent query architect.

Building a library of queries

Best practices for building your library

- Plan for a folder structure and naming convention for queries because multiple users will create queries and it may become difficult for a user to find the query they need.
- Establish a review of all queries to delete incorrect or unused queries. Consider a policy of allowing the user to copy or borrow another user's query but not to modify the original query.
- Use the Summary tab to track the author (based on the user's iMIS username) and created/update dates.
- Make sure that any user defined tables have been previously published.

- If your query is for a merge output process and you want your query to be accessible to users via Home > Generate Reports, you must create your query in the Tools> Common> Reports View folder. You can navigate to that folder from Tools > Intelligent query architect, or from Home> Generate reports.

Queries in the Document System

The Document System (Tools> Document System) offers a complete administrative tool for managing folders, security, and storage of queries. You can implement an entire library of queries that can be used in iMIS modules to best meet your users' needs.

Creating links to reports in the Document System

You can create links in the Document System that place the queries in the Generate Reports menu for certain areas.

Each area's DefaultSystem folder contains three sub-folders:

- Queries
- Reports
- ReportsView – link to these queries to display them in the Generate Reports menu for each area.

To create a custom folder in the Document System

1. Select Tools> Document System.
2. Select a folder from the document system directories.
3. Click New Folder.
4. Enter a folder name, for example Custom Queries.
5. (Optional) Select Allow only the following type(s) of objects in this folder and select the type of objects from the list.
6. Click Save.

Integrating queries throughout iMIS

Before you begin

You must have sufficient authority to create, edit, and delete queries in the listed Document System folders.

Enabling queries on user-defined tables

To build a business object for a user-defined table

You must build a business object for each new user-defined table you create; until you do, the table cannot be used as a source in a query definition.

1. Create the user-defined table.
2. From Tools > User defined tables, click Build All.
3. If you need binary data types (such as a character field greater than 255 characters) to display in the field list, add each type manually.

   To add a binary field to the View list

   When the business object is built, any character fields with a length greater than 255 characters are converted to binary data type. Fields with binary data type do not display when you select All from the View list on the Display tab in IQA. You must manually add fields of this type to the list.

1. Make sure you are in Advanced mode.
2. On the Display tab, select All from the View list.
3. Scroll to the bottom of the Display page.
4. In the SQL Expression field, enter the name of the field.
5. (optional) Enter an Alias for the field.
6. Select Add.

Building Queries

IQA provides two modes for query definition: Basic and Advanced. The general steps for defining a query are the same in either mode, but additional functionality is available in Advanced mode. Use Basic mode for querying and displaying simple lists of results from one or more sources with optional filters to narrow the results. Use Advanced mode for more complex queries and displays.

The default selection is Basic mode and a query writer will always be in Basic mode until they select Advanced mode. After selecting Advanced mode, they will always be in Advanced mode (even after signing out and signing back in) until they select Basic mode.

Basic Mode	Advanced Mode
Define sources and (optional) filters	Use calculations, such as sums and averages
Specify display details	Use queries in iMIS searches
	Use SQL expressions in queries
	Use complex filters, such as displaying only unique results
	Allow or require end user to supply parameters at run time
	Aggregate data and display
	Assign aliases to field names for display
	Link a display property to another page

See Reporting in IQA for information about using queries for reports.

The general steps to define a query are:

Define the query mode

Define the query as Basic or Advanced, depending on complexity. Use Basic mode for simple queries without calculations like sums and averages or SQL expressions.

Name the query

Follow a structured naming convention to make queries easier to locate. See Building a library of queries for guidelines.

Add source(s) for the query

Add one or more sources (business objects and/or queries) for the query. For example, you could set up a query based on the Contacts business object alone, or on both Contacts and Activities, or on a previous query with an additional source.

Use existing relationships between sources or create new ones.

If you have chosen more than one source for your query, there must be relationships among them. The most common relationships are used by default. However, you might need to create new ones. You can associate business objects and queries through fields that contain the same data.

To make user-defined tables available as sources in IQA, have your system administrator publish them in Tools> User Defined Tables. Whenever a new custom table is added or updated, the system administrator should re-publish the tables.

Set filters to narrow query results

Use logical operators (such as equal, not equal, and between) to refine query results.

Select the columns to display

You can select the columns you want to display from the sources you have selected and the order in which you want the columns to appear.

Define the sorting order of the columns

You can order and prioritize the properties in each column in ascending or descending order.

Test the query

It is important to test the query and edit it, if necessary, to make sure the desired results are returned.

Modify security access to the query

You can modify the security on a filter to assign read, write, and run privileges.

Save the query to an appropriate folder

To save a valid query, you must select at least one source and one column. If you select more than one source, the relationship between them must be defined. In most cases, a default relationship is inherited from your sources.

Tips for building queries

- Review information on Business Objects to help select the appropriate objects for your query.
- Base the structure and location for your query file/folder on the needs and access levels of your users. See Building a library of queries for information and hints.
- Start with a single source object and add additional objects as needed.
- Some attributes (relations, default columns, default column order) are inherited from the sources you select. You can modify these default settings during query definition/editing.

Creating or editing a query (Basic mode)

The following procedure shows how to define a new, simple query. To edit an existing query, you can follow the same procedure. In some cases, a system administrator can navigate to the webpage where the results are displayed and click Edit Source Query. See Editing a query for more information.

To create or edit a query in Basic mode

If you have been granted access to an IQA folder, you can edit or create queries in that folder.

1. From Tools > Intelligent Query Architect, select Edit> Query or New> Query.
2. Make sure Basic mode is selected.
3. Enter a Name and (optional) a Description for the query.

   Tips:

Do not use an apostrophe (') in the query name.

Make sure the query has a unique name. The system does not check the name for uniqueness.

4. Click the Sources tab and click Add Source. Navigate to find a business object or query to use as a source for the query. (Most business objects are located in the Common folder.) Select the desired source and click OK.

   Note: When you add a source more than once, the system automatically appends a numeric value (beginning with the number 1) to the second and subsequent sources to distinguish between the sources. For example, if you add the Contact business object three times in order to set up a variety of relationships, the instances would be labeled Contact, Contact1, and Contact2.

5. (optional) Select an additional source and click OK. Use the up and down arrows to reorder the data sources as needed.

   If you select more than one source, you must define the relationships among the sources. Most sources have a common relationship as a default. Use the default, choose the desired relation from the list, or select Custom from the drop-down list to define a new one.

6. (optional) Click the Filters tab and define the filtering rules:

- Select the Property to be compared.
- Select the type of Comparison, such as Equal, Between, or Empty. Enter the Value or select a date for comparison.
- Click the + icon to add the filter.

  Tips:

  When you select Between, the Value column changes to display two fields with the word "and" between them. The specified values are inclusive.

The pattern comparisons (Contains, Not Contains, Starts With, and Ends With) use a simple text field even for a Property that normally contains a discrete drop-down list of values.

The Contains comparison type performs a string comparison to find one string within another string. A partial match (for example, only a portion of a word) is required.

Enter multiple values for a pattern comparison (Contains, Not Contains, Starts With, and Ends With) by separating each value with a comma.

Click the calendar icon next to any Date field to select a date. If you need to specify a specific time on the selected date, first enter the time in the Date field, using 24-hour format (for example, enter 23:00 for 11:00 p.m.) then click the calendar icon to select the date.

When entering numbers for a comparison on a date field (Within Days, Within Months, Within Years), be aware that such comparisons are zero-based. For example, if you select the Last Updated column and select Within Days, you must enter zero in the Value field to get all records that were updated within one day or enter 1 to get records that were updated within two days.

7. Click the Display tab and define how results columns will be displayed:

- Select the columns you want to work with (Selected, Defaults, or All) from the View list.
- Select the Only display unique results option to prevent duplicate results from displaying. When the query includes a property with a display function such as Count, that property is used to determine unique results. If the query includes more than one display function, only the first function property displayed (defined by the display order) is used.
- Select the results columns to Display to users. Select the Order in which you want the columns to display to users (from left to right). The order is based on the Order column, not the order in which they were chosen. Subsequent sorting selections go at the end of the sort order list (per session) by order listed within each session.

  Tip: If you are defining a query for a merge output process, make sure you select all columns needed for the merge.

8. (optional) Click the Sorting tab and specify the sort order for each column:

- Select the Property to sort by.
- Select the sort Priority for each Property.
- Select the Direction of data in each column: Ascending or Descending.
- Click the + icon to add the sort.

  The user can sort columns in the output by clicking on a column header. A carat symbol (^) will display in the column header, indicating that the column is now a sort column. The user-selected sort overrides any sorting defined on the Sorting page and will change the sort definition in the query to reflect the current column sort.

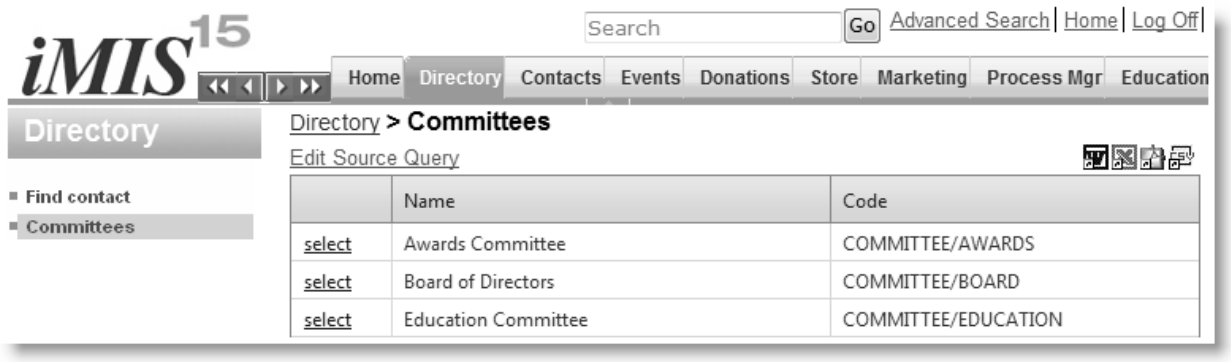
9. Select Run to test the query. If necessary, select Define to edit the query.
10. Select Security and select the Access Mode option to assign access and privileges for the query and its results display. The names of authorized users are listed in the Current Access List.
11. Click Save. Select the folder in which to save the query.
12. (optional) Click Report to save this query as a report definition. You can customize these reports and export them to .PDF or .XLS format. See Reporting in IQA for more information.

    Editing query-generated lists in iMIS

    Authorized users can edit an existing query that drives an IQA-generated list directly from the pages on which they appear. When you see a link called Edit Source Query above such a list, you can click the link and change the query in place, without leaving the page or navigating the Document System. This ability means that you can make quick and easy changes to query filters, column display, and sorting.

    If the link does not appear above a query-generated list, then you must navigate to IQA to edit the query. For example, you cannot edit query-generated lists from many iParts. Some IQA features are disabled from this view of the query: you cannot rename the query or Save As. Depending upon the list's implementation in iMIS, a list's Edit Source Query link may be hidden until the query is run for the first time.

Caution! Queries are not versioned in iMIS. If you are unsure about the changes you are about to make, consider navigating to IQA instead so that you can create a copy of the original query before making any edits.



To modify a query from a webpage

1. Navigate to the desired page.
2. Click Edit Source Query.
3. Modify the information for the query, including:
   - Renaming the query
   - Adding sources
   - Defining filters
   - Specifying columns and links to display
   - Selecting column sort order for display
   - Editing security settings
4. Click Save.
5. Run the query to check the results and the display.
6. (optional) Select Report and save this report definition to your workstation or to the Document System. Click Save.

Defining displays for users

The Display options in query definitions specify which columns and fields to display, and in what order. You can use iParts to define where and how you want to display the query results for your users. These iParts allow you to:

- Display query results in a simple form view: Summary Display iPart
- Merge query results into your site with whatever title, parameters, columns, labels, and sorting you need: Query Menu iPart
- Enable exports to Word, Excel, PDF, and CSV (comma-separated values): Query Menu iPart
- Allow users to select which query they want to view: Query Menu iPart
- Display query results in a chart, such as a pie chart or a bar graph: Query Chart Viewer iPart
- Display a group of product or profile images based on the results of an IQA query: Related Items iPart.

For an example of using the Query Menu iPart for a results display, see Example: Display completed orders.

Mastering IQA

Use Advanced mode to define queries with calculations and/or SQL expressions, and to aggregate data. You can set up complex filters and assign aliases to field names for display.

Defining a query (Advanced mode)

The Advanced mode gives you powerful methods to query, filter, display, and report your results. The steps to build a query in Advanced mode are the same as in Basic mode, with additional options described in the following sections.

Advanced options for Summary

In Advanced mode, the Summary page provides a field to define any SQL statement for your query.

Advanced options for Sources

In Advanced mode, the following options are available on the Sources page:

- Use FORCE ORDER option: Require SQL Server to join the tables in a query in the order you specify.
- Use NOLOCK locking hint: Require SQL Server to ignore record locks.
- Use join method for security enforcement: If enabled, when users run the query, iMIS checks to make sure they have permission to read every source within the query before displaying the results, whether the source is a business object, another query, or both. When disabled, iMIS does not check the security for every source and instead only enforces the security setting for the main query.

Advanced options for Filters

Filters refine a query. You can limit your results by eliminating duplicates, using comparisons, setting parameters, and using logical operators.

Developing filters

In Advanced mode, the following options are available on the Filters page:

- If you have selected multiple sources, you can select Add Filter to define additional filter rules using the And, And Not, Or, and Or Not connectors. Use the up and down arrows to specify the order in which to apply a filter.

Controlling joins between filters

Tip: When you define more than one filter, by default the join uses And, which narrows the results. However, if you add multiple filters on the same object Property (such as StateProvince), by default the filters join with an Or connective, which broadens the results. Therefore, to use the same object Property in an And join, create those filters separately.

For example, to define a filter to obtain customer records in Texas and in Virginia, first create one filter (where StateProvince = TX) and then select Add Filter to define the second part (where StateProvince = VA).

- A Multiple checkbox is visible when the filter Property contains a discrete drop-down list of values. Selecting this checkbox changes the Value selector from a simple drop-down list that enables you to select only one specific value to a multi-select control that enables you to select multiple values. The selected values are used as an Or comparison. See Defining a filter property with several values for more information.

  Tip: Even if the Multiple checkbox is not visible, you can still manually specify multiple values for any filter property by entering a comma-delimited list of quoted values. For example, you could specify the following multiple values for a City property: "Toronto","Montreal","Calgary"

- Require the user to provide at least one valid value: User must enter a valid filter value before the query can be run.

Adding runtime parameters

In Advanced mode, you can create a parameterized query, which allows (or requires) users to specify a value (such as "state = FL") to narrow their search. This lets other staff members run a standard query, changing a runtime parameter value each time to get the results they need. Such queries are useful for organizations where limited number of users may create the actual queries.

Query options: Limiting results returned

Limiting the rows returned by a query

You can set an advanced filter on a query to set a hard limit or a default value for the number of returned rows.

To limit the number of rows returned by a query

1. Create or edit a query. (See Building Queries.)
2. Select the Filters tab.
3. Select Advanced mode.
4. Select the Limit the number of results returned option.
5. Enter the Value for the maximum number of rows to display
6. (optional) Enter a Prompt for the user and specify the behavior:

- No: Enforces a hard limit on the specified number of returned rows, which a user cannot change.
- Required: Makes the specified number of returned rows a default value. The user can change the value up to the maximum defined in the web.config file. If the user specifies zero or a blank value, the query returns the maximum defined in the web.config file.
- Optional: Makes the specified number of returned rows a default value. The user can change the value up to the maximum defined in the web.config file. If the user does not enter a value, filtering does not occur and the query returns all values.

7. (optional) Enter custom text for the prompt (default is Maximum number of rows to display).

Tip: To create a "top n records" query result, specify at least one property on the Sorting tab.

Defining a filter property with several values

When a filter Property contains a drop-down list of values, you can select a single value from the list or you can select more than one. The selected values are used as an Or comparison.

To define multiple values for a filter property

1. Create or edit a query. (See Building Queries.)
2. Select the Filters tab.

3. Select Advanced mode.
4. A Multiple column displays between the Comparison and Value columns. For properties that have a discrete list of values, a checkbox displays in the Multiple column.
5. Select a property that has a discrete drop-down list of values, such as State Province.
6. Select the Multiple option.
7. A default Value displays. Browse to select another value.
8. From the Available Values list, select the values that you want to use in the filter. You can multi-select values by holding Shift or Ctrl while selecting values with your mouse.
9. Click OK.

   The selected values appear in the Value column.

Tips for adding filters

- If iMIS is installed on a case-sensitive SQL server, the filters you define in IQA are case-sensitive. You will not be able to define case-insensitive filters on queries when iMIS is running against a case-sensitive SQL Server.
- Select the Require user to provide at least one value option when you want to require a value for every filter you define for a query.
- Selecting the Remove icon for a filter set removes the filter set and all related filters from the query.

More filter options

Adding dynamic filters to queries

You can dynamically filter your query results using the variables described below.

Note: You must enter the quotation marks where indicated when using the following variables.

- Filter by ContactKey and UserKey properties:
- “@LoggedInUser” and “@Me”: Both filter by the currently signed in user.

- “@SelectedUser” and “@SubjectContact”: Filters by a selected contact, such as contacts selected through On-Behalf-Of or user impersonation. These variables also honor ContactKeys sent via URL parameters. For example, set Contact.ContactKey equal to "@SelectedUser".
- Filter by date properties:
- @Date: Filters by the current date.
- @Now: Filters by the current date and time.

Advanced mode options for Display

In Advanced mode, the following options are available on the Display page:

- Function: Allows the user to find Count and Min or Max on a field.
- Alias: Creates a label name for the field to be displayed to users. The alias entered can contain special characters.

  Use key_ or code_ as a prefix in the Alias field to hide columns under certain conditions:
- If you use code_ as a prefix, this field will always be hidden from the initial result set.
- If you use key_ as a prefix, this field will be hidden if the current column is not a GUID.
- Link: You can add a link for each column listed in the Display tab so that the user can click on the link to go to a specified page for more details. See Linking IQA results for more information.
- Subtotal: Specify whether the property should be subtotaled in the display. You can display query results in a hierarchical grid of summary rows and detail rows by using the Subtotal option. See Hierarchical grid display for more information.

Linking IQA results

IQA lets you design search results that contain live hyperlinks within the items that are returned. Using the Link feature on the Display tab, you can create hyperlinks for one or more columns in your query results. These links let users immediately click through to the

records and content that they are seeking. In the example below, users can click links to contact profile and product pages.

Recent Orders

Transaction Date	Full Name	Product Name	Quantity
1/5/2011	Mr. Charles P. Better, LLM	Waterbottle	9
5/6/2010	John Waitts	Video - Creating a New Business	1
5/6/2010	Sam Self	Video - Is Fast Food Franchising for YOU!	1
5/6/2010	Isaac Wilder	Video - Excelling through Service	1
5/6/2010	Fran Ramos	Video - Creating a New Business	1

You can add this linking while you are editing a query: in Advanced mode on the Display tab, populate the Link field with parameters to generate the custom link. The link must have one of these forms:

a shortcut	~/MyShortcut
a content record	ContentCode=MyContentCode
a navigation item	NavigationCode=MyNavigationCode&URLParameter1Name=[PropertyName]
an ASPX page in your site	~/Webpage.aspx&URLParameterName=[AliasName]
a page dynamically populated based on the value of one or more URL parameters	~/MyShortcut&URLParameter1Name=[Alias Name]&URLParameter2Name=URLParam2Value

Guidelines for creating query links

- To build a link, you must indicate whether it is for a content record (ContentCode) or a navigation item (NavigationCode). Content record links display the published content record within an iMIS website, regardless of the sitemap definition. Links to a navigation item take the user to a particular page within an iMIS sitemap.
- ~/MyShortcut – For the given property, a link is established to the shortcut specified (shortcuts are defined in Site designer > Manage shortcuts). For example, if you want to link

query results to a Products shortcut you have defined, then enter ~/Products.

- ContentCode=MyContentCode – For the given property, a link is established to the content identified by the ContentCode value. For example, if you want to link query results to a product page content record that has a Content Code of Specials, then enter ContentCode=Specials. To define or edit a Content Code, go to Content designer > Manage content, edit a content record, and expand the Properties pane.

  Note: If the Link includes both a ContentCode and NavigationCode, only the ContentCode is used to build the link.

- NavigationCode=MyNavigationCode – For the given property, a link is established to the navigation item identified by the NavigationCode value. For example, if you want to link query results to a profile page's navigation item that has a Navigation Code of ProfilePage, enter NavigationCode=ProfilePage. To define or edit a Navigation Code, go to Site designer > Manage sitemaps, edit a navigation item, and expand the Properties pane.

- Using URL parameters, you can control the data displayed on the target page if it contains an iPart that accepts such a value. The URL parameter can either be hardcoded to a specific value or it can be dynamically generated based on the value of a particular Property or Alias of the query. You can add multiple URL parameters to the Link, separated by ampersands (&). URL parameters should be in this form:

- &URLParameter1Name=[PropertyName] – Dynamically builds the link based on the value of the specified query property. When referencing a query property, do not include any spaces. For example, if you want to set the URL Parameter iProductID to the Product Key property value, enter &iProductID=[ProductKey] (no space between Product and Key). By combining this example with the Shortcut example above, you can build a link that opens the shortcut populated with the product in the query results. The full Link would look like this:

  ~/Products&iProductID=[ProductKey]

- &URLParameter1Name=[Alias Name] – Dynamically builds the link based on the value of the specified Alias. If you want to create a link for a query property and you have given it

an Alias, then you must reference the Alias name in the Link, not the Property name. For example, if you want to set the URL Parameter ID to the Id property value in the query results, and you have given that property an Alias name of iMIS Id, enter &ID=[iMIS Id] (include the space between iMIS and Id). By combining this example with the NavigationCode example above, you can build a link that opens a particular user's profile page. The full link would look like this:

NavigationCode=ProfilePage&ID=[iMIS Id]

- &URLParameter1Name=URLParameter1Value – Sets the URL parameter to the same value in all of the results.
- If you want to use a property in a link's URL parameter, that property must be selected on the Display tab. However, you may not want a user to see values for all of the properties required to build a link. You can hide columns from a user by giving the property an Alias prefaced with code_. In the example screenshot above, the Full Name column uses the value of an ID property to build the link, but the ID property is hidden by giving it an Alias of code_ID.
- It does not matter the order in which you specify the parameters.

Troubleshooting tips

- If you get an error message after clicking a link in your query results, check your link entry for the following:
- If you have an opening bracket, you must also have a closing one [ ].
- If you provide an Alias for a property, then the original property name is no longer usable in the Link field. The Alias always overrides the original field name and will be the only column name available for reference in the results.
- If your query result links do not work as expected, try the following troubleshooting techniques:
- If possible, find a place in iMIS where the target page is correctly displayed and compare the URL parameters that appear for that page to the ones you have identified in the Link

text field. Are there additional parameters required that you have not provided?

- Add the query to a content record in your website, so that you can view the query results like an end user would. After clicking a linked query result, examine the URL in your browser. Compare it to the Link you have built in IQA to determine if the URL is incomplete and if it contains everything you intended.

Hierarchical grid display

You can display query results in a hierarchical grid of summary rows and detail rows by using the Subtotal option. Subtotaled columns display as high-level items. Expanding one of these items displays the detailed (non-subtotaled) items.

Tips for creating a query displayed in a hierarchical grid

- The fields that are subtotaled are one query, and the fields that are not subtotaled are a separate query. Because of this, make sure that if you create a link for a column which contains a parameter that is a hidden field, the subtotal option for both of those fields must be the same – that is, both must be subtotaled or both must not be subtotaled.

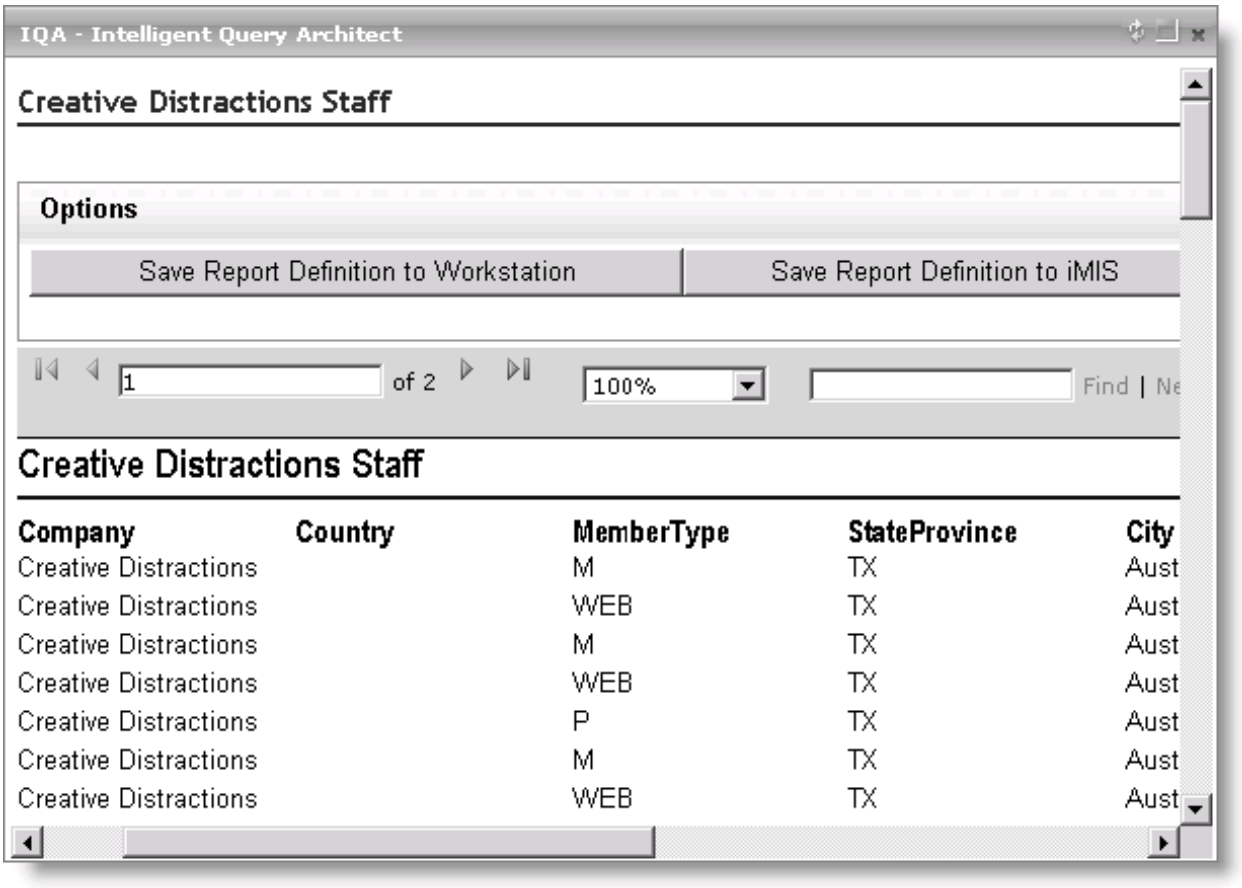
  For example, if you want to display a list of committees as a summary and the members of each committee as details, you would specify a link for the column Committee with a hidden group key field and select the Subtotal option.

- If you select the Subtotal option for all properties in a query, the results will not be displayed in a hierarchical grid.
- Any properties that are not subtotaled are displayed in the detail rows only.
- To display a non-numeric property in the summary rows, select the Subtotal option.
- Numeric, decimal properties (such as Donations.Amount, Orders.Balance, and DuesHistory.Amount) are automatically summed and displayed in the summary rows and also displayed in the detail rows. To display these properties in the summary rows only, select the Subtotal option.
- Non-decimal numeric properties such as Contact.Date of Birth, Contact.iMIS Id, and Contact.Home Phone are not automatically summed.

- If you select the Subtotal option for custom SQL expressions in your query, they will display in the summary rows. The subtotaled expression would not have any other effect on the query results.
- If the custom SQL expression is the only property subtotaled in your query, the query will not be displayed in a hierarchical grid. You must select the Subtotal option for at least one property that is not a custom SQL expression to display a hierarchical grid.

Reporting in IQA

This Report view is a fast and easy way to create and print new iMIS reports and to generate starter reports for later development. SSRS reports are always bound to a single query.



IQA reporting lets you:

- Export rendered reports to .PDF format, for archiving, sharing, and printing, and to .XLS format, for spreadsheet usage
- Customize the generated reports: totals, subtotals, summaries (Total Only), parameters (associated in the query)
- Save the reports into the Document System, which automatically adds the new template (.RDL) and its matching output process (binding query, template, and security to a report name you choose)
- Save the generated template file (.RDL) locally, to customize later in SQL Server Business Intelligence Studio

Quick facts: IQA reporting

- iMIS integrates with the Microsoft SQL Server Reporting Service (SSRS)
- iMIS also harnesses it to bring dynamic reporting capability to iMIS queries.
- IQA reporting makes it possible to turn any query into an SSRS report:
- Filtered and auto-formatted
- Customized with sub-totals and layout settings
- Easily saved back into the Document System
- Easily saved to your workstation as an .RDL
- Free report customization in Business Intelligence Studio

Report from every query

- Every working query in iMIS can render a report in one click, without any modification
- Create reports on the fly without having to learn a report designer
- Reports inherit whatever filters the query contains

- Changes to the query show up in IQA reports immediately
- Built-in report navigation: start, end, next/previous page, jump to page

Auto-formatting

- Query result columns become report columns
- Formatting adjusts to fit the number of columns
- Change column order just by reordering them in the query

Simple saving

- No garbage: if you just create, view, and close a report, no files save or accumulate
- You save your query changes separately from the report
- Save to iMIS creates the report and template pair wherever you choose in the Document System
- Saved reports can be exposed and shared throughout iMIS as any other report
- Save to Workstation creates the report template (.RDL) on your file system, for offline editing
- Exports report data to Excel (XLS) format
- Exports formatted report to Adobe PDF

Subtotaling

- On the Display tab of queries, columns can be subtotaled and totaled
- Sort order controls order of subtotaling
- Use Totals Only to create a summary view, of subtotals without data lines

Customizable layout

- SystemConfig table holds SSRS parameters that set layout and formatting of all IQA reports
- Control page size (such as A4 versus Letter) and lay out headers and footers

- Control fonts, background and foreground colors, shading and separator lines
- Set report language and unit of measure

Creating and saving IQA reports

For all of your queries, the Report option in the IQA Editor lets you generate formatted reports on demand, as well as reusable objects: SSRS template files and matching output processes. Your queries from prior releases can leverage the Report command: no upgrading is needed to make them compatible.

To save reports from IQA

1. Select Save Report Definition to iMIS to save the reports to the Document System, which automatically adds the new template (.RDL) and its matching output process:

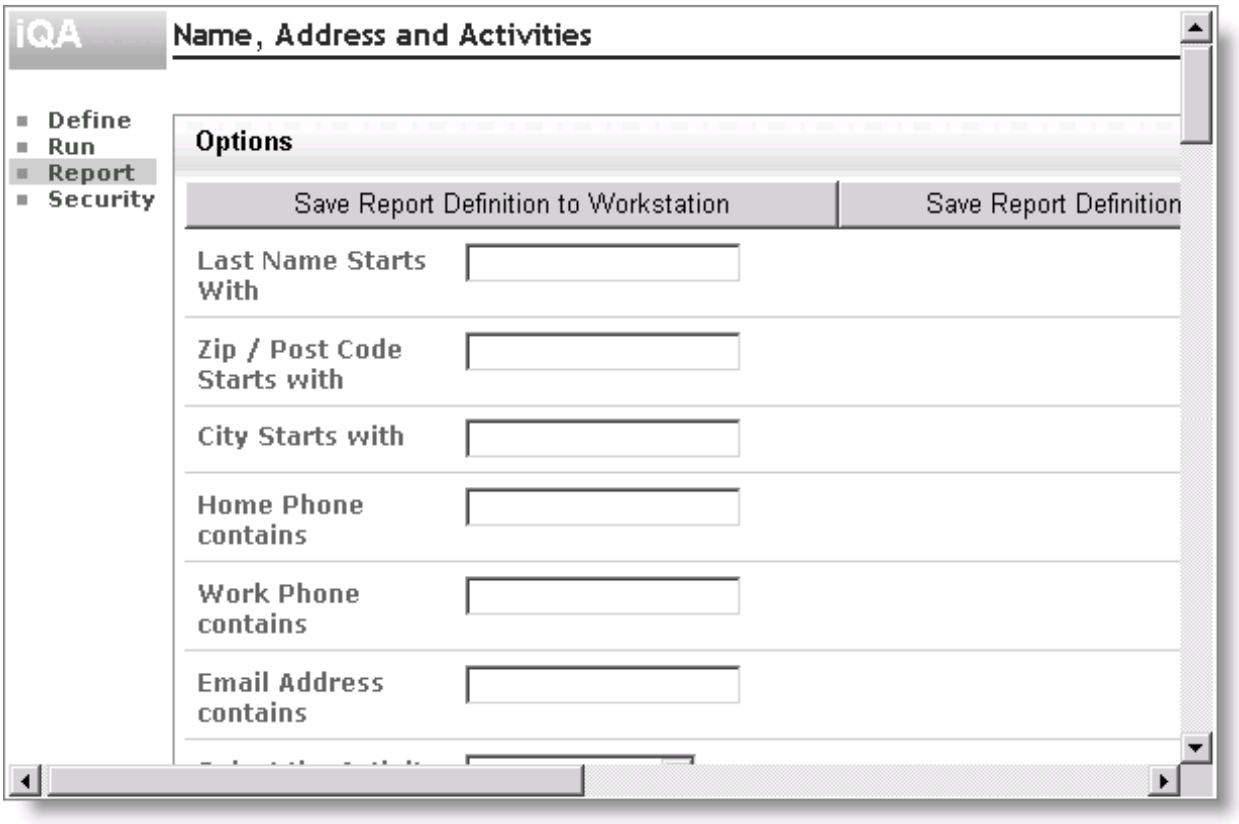
   The output process binds query, template, and security to a report name you choose.
2. Select Save Report Definition to Workstation to export the generated template file (.RDL).
3. You can customize the RDL in SQL Server Business Intelligence Development Studio.
4. Select the Acrobat and Excel icons to export the report to standalone PDF or Excel files.
5. You can Open these exports directly in the application or Save them to your file system.

   To create a report from a query

1. Edit a query and click the Report link in the IQA navigation.
2. The report generates in memory and displays, fully formatted, immediately.
3. Reports default to the actual page size specified by your global parameters (see Changing the default layout for SSRS reports), so use the scroll bars to preview the entire area.

Note: If the report is too large to fit in portrait orientation, it renders in landscape. If it is too large for landscape, the columns are narrowed to fit.

4. If your query includes filters (which appear in the Options area above the report display itself), enter a value in any or all of the filters, as needed, and click Refresh.



The report regenerates based on the filter.

13. Adust the filters and Refresh as needed.

Printing IQA reports

IQA handles printing with printer-ready layout through its facility to export to .PDF. You must have Acrobat Reader (see Adobe - http://www.adobe.com) installed on your workstation to support this. When you export by clicking one of the output icons, you're prompted to Open or Save.

When you select Open (or you later open the .PDF file from Windows Explorer after saving it), the exported .PDF displays in Acrobat Reader.

To print PDF reports

1. Verify that Acrobat Reader is installed on your workstation.
2. Open the PDF report, from either IQA or the file system on your workstation.
3. In Acrobat Reader, open the Print dialog, using the toolbar icon or File > Print.
4. Select the printer you want, and click Properties if you need to change the paper or orientation.
5. Select the print range, page handling, and advanced settings you want.
6. Click OK.

Subtotaling and ordering IQA reports

You can apply one or more subtotals in your query definition. In Reporting Services terms, subtotals are “groups”. When you enable Subtotal for a Display enabled field, a group is added. The groups nest in the Order you specify after Subtotal.

In the output, group headers appear for the first group only; group footers, with a count and the value being grouped, print for all groups.

Controlling queries

Global layout control

IQA reporting layout is driven by global parameters that you control.

The Report view uses layout parameters stored in the iMIS SystemConfig table, so you can change parameters once (such as to assign corporate colors or A4 paper size) and have all IQA reports conform to your standards across the organization.

Requirements

This IQA-based reporting works with all of your queries, old and new. Everything you need for IQA reporting is distributed with iMIS. No additional licensing is needed for the ReportViewer control, which is a Microsoft redistributable component. Nor do you need to install Reporting Services on SQL Server, since the Report Viewer does all the needed processing.

Troubleshooting tip: If you see ReportViewer errors, you might have an old ReportViewer control. To get the newer version, search the web for Microsoft Report Viewer Redistributable 2005 SP1 (Full Installation), which is available for free download from several sites.

The optional applications are also free:

- Adobe Acrobat Reader, for opening and printing PDFs (install on workstations)
- SQL Server Business Intelligence Studio, for customizing RDL files externally, if needed

Creating links to reports in the Document System

You can access the Document System from Tools > Document System. You can further drill down into areas by following the hyperlink on the folder. Area folders contain a DefaultSystem folder.

The module's DefaultSystem contains three folders:

- Queries
- Reports
- ReportsView

The ReportsView folder for each module is represented by the Generate Reports menu in each area. You can manipulate what appears in those menus by creating links to queries in these folders.

To create a custom folder in the Document System

1. From Tools, select Document System.
2. Select a folder from the document system directories.
3. Click New Folder from the tool bar.
4. Enter a folder name, for example "Custom Queries".

5. (Optional) Select Allow only the following type(s) of objects in this folder and select the type of objects from the list.
6. Click Save.

Using IQA

General users with authorization can click the Select source query link located on many pages to access queries. They can also run reports based on queries from the appropriate pages.

Icons

The following icons are used in IQA:

Delete – Remove a field, filter, source, or other objects from a panel or query.

Add – Add a field, filter, source, or other objects from a panel or query. You must click this icon to apply the changes after creating the object.

Query – Distinguishes queries from other definition object types in the Document System.

International Taxation

International taxation changes how shopping carts appear to users in different regions.

This is how iMIS shows the same product across various taxation methods:

Canadian Taxation (GST and HST)

iMIS supports calculation for Canadian federal taxes (GST and HST). This allows you to tailor your organization's taxation method for both Canada and specific Canadian provinces. Applicable taxes are calculated automatically based on the default Canadian tax authority and customer province.

The tax codes for the GST/HST calculation method need to be set up in iMIS before they can be used. If these tax codes are not defined on the Product_Tax table, any taxes calculated equal zero.

To implement GST/HST calculation, you perform the following tasks in iMIS:

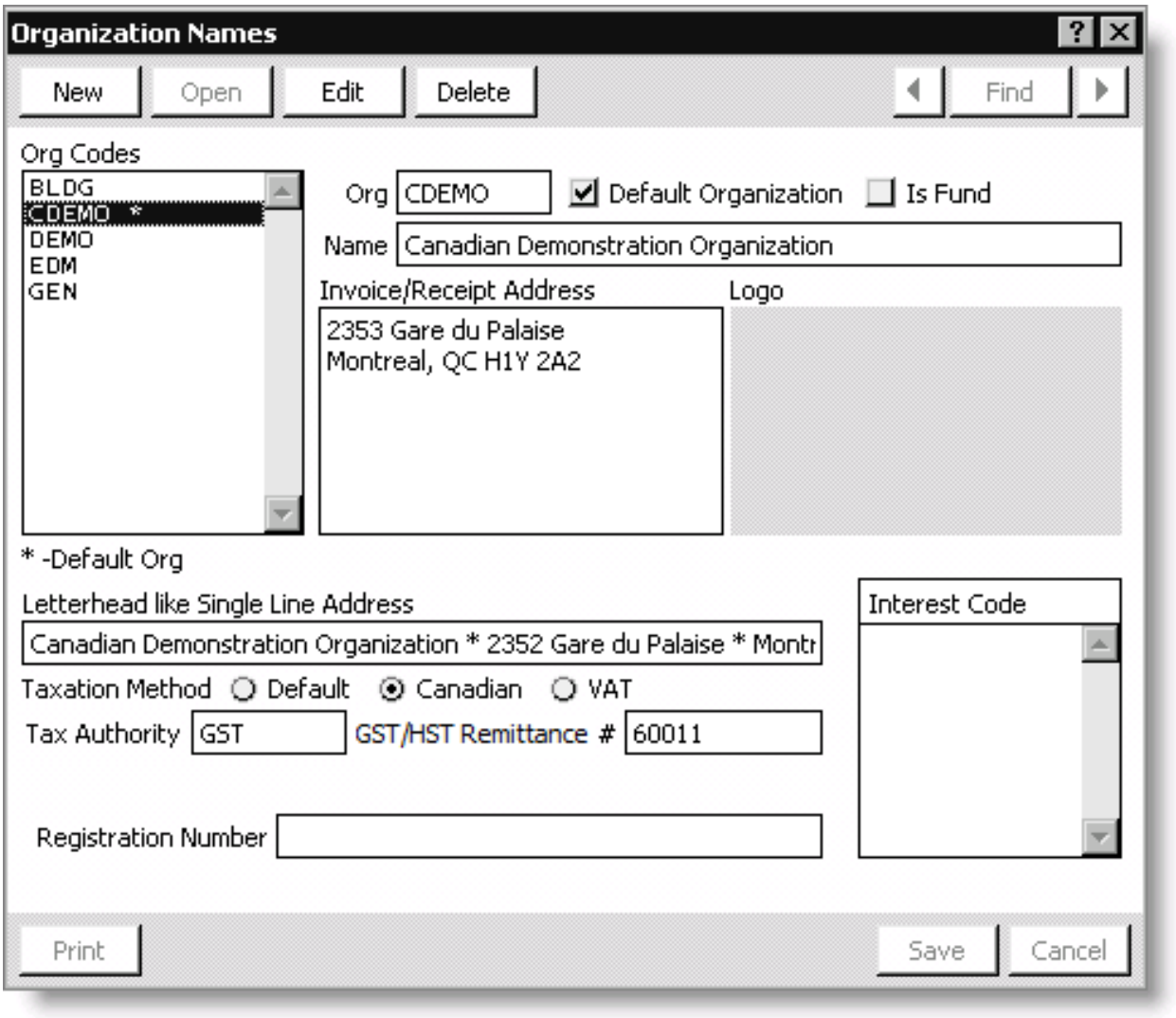
- Enable the Canadian taxation method for the Default Organization.
- Define the tax codes.
- Define the default tax authority.

Note: When you enable the Canadian taxation method, the VAT or Default taxation method is disabled automatically for an organization. Canadian and VAT taxation methods are mutually exclusive.

Enabling Canadian taxation for the Default Organization

The Canadian taxation method must be enabled for the Default Organization on the Organization Names window before establishing the specific tax codes used by the different modules of iMIS. After enabling the Canadian taxation method, exit and restart iMIS to implement GST or HST calculations for the Default Organization.

Organization Names window



- Org Codes - Lists the codes for the available organizations.
- Org - (required) Enter an abbreviated, descriptive code for an organization.
- Default Organization - (required) Enable to identify the organization using Canadian taxation as the default organization. If the organization using Canadian taxation is not designated as the Default Organization, the Canadian taxation method will not be implemented. An asterisk displays to the right of the default organization in the Org Codes drop-down list.
- Is Fund - (optional) Enable to indicate that an organization is also a fund.

- Name - (optional) Enter the full name of an organization. A maximum of 60 alphanumeric characters can be entered.
- Invoice/Receipt Address - (optional) Enter an organization's complete address. This address is the receipt address for invoices and other correspondences. It is also used on reports where the name and address display as a block.
- Logo - (optional) Paste an organization's logo into this area of the window.
- Letterhead like Single Line Address - (optional) If an organization's letterhead is a single line address, enter it in this field. The letterhead is used on reports where the address appears in a single line, such as event confirmations.
- Taxation Method: Canadian – Enable to use the Canadian taxation method. The following fields display when the Canadian taxation method is enabled:
- Tax Authority – Enter an organization's default tax authority. When defining a default tax authority for a Canadian organization, enter the Primary GST for the default tax authority.
- For non-Canadian organizations that use Canadian taxation and include the GST tax in the advertised price of all products (some organizations in Australia and New Zealand), enter GSTINC for the default tax authority.
- Press Ctrl+L to look up the tax authority codes defined on the Set up tax codes window (from AR/Cash, select Set up tables > Tax codes).
- GST/HST Remittance # – (optional) Enter the Canadian GST (Goods and Services Tax) number. The Canadian GST can be printed on invoices.
- Interest Code - (optional, Fundraising) Enter the interest code associated with each fund. Press Ctrl+L to find the interest codes defined on the Set up interest codes window (from Customers, select Set up Fundraising > Interest codes). This field appears only if you are licensed for Fundraising.
- Registration Number - (optional) Enter the registration number associated with an organization or fund. Fundraising organizations must have a registration number (Canada) or tax identification number (United States) to claim and verify tax-exempt status. This field

is applicable for the Fundraising module.

To enable GST for the Default Organization

1. In iMIS, select File > System Setup to open the System Setup window.
2. Click Organization Names to open the Organization Names window.
3. Add or update an organization.

   If adding a new organization, click New and enter a code for the organization in the Org field.

   If updating an organization, select one from the Org Codes list and click Edit.
4. Enable the Default Organization option.
5. Enable the Canadian taxation method option.
6. Enter the GST/HST Remittance number in the GST/HST Remittance # field.
7. If licensed for Fundraising, enter the registration number in the Registration Number field.
8. Click Save, close all windows, and restart iMIS for changes to take effect.

Defining Canadian tax codes

Canada has several types of taxes: a Harmonized Sales Tax (HST), a national Goods and Services Tax (GST), and a Provincial Sales Tax (PST). Because provincial taxes sometimes include a tax on the base national tax (a tax on a tax) in addition to taxes calculated for goods and services, set up base and primary tax authorities that allow for this extra calculation.

These are the roles of the various tax authorities:

- BASE_GST - Specifies the GL account for national tax and tax rate.
- BASE_HST - Specifies the GL account for harmonized tax and tax rate. For multiple rates, create codes for each: BASE_HST12, BASE_HST13, BASE_HST15 (for 12%, 13%, and 15% respectively).

- Primary GST - (required) Primary GST entry, which relates back to the BASE_GST (no GL account or tax rate should be entered).
- Primary PST - Specifies the GL account. This is related to BASE_GST and may indicate that PST tax is also applied to the GST tax amount. Use the province abbreviation.

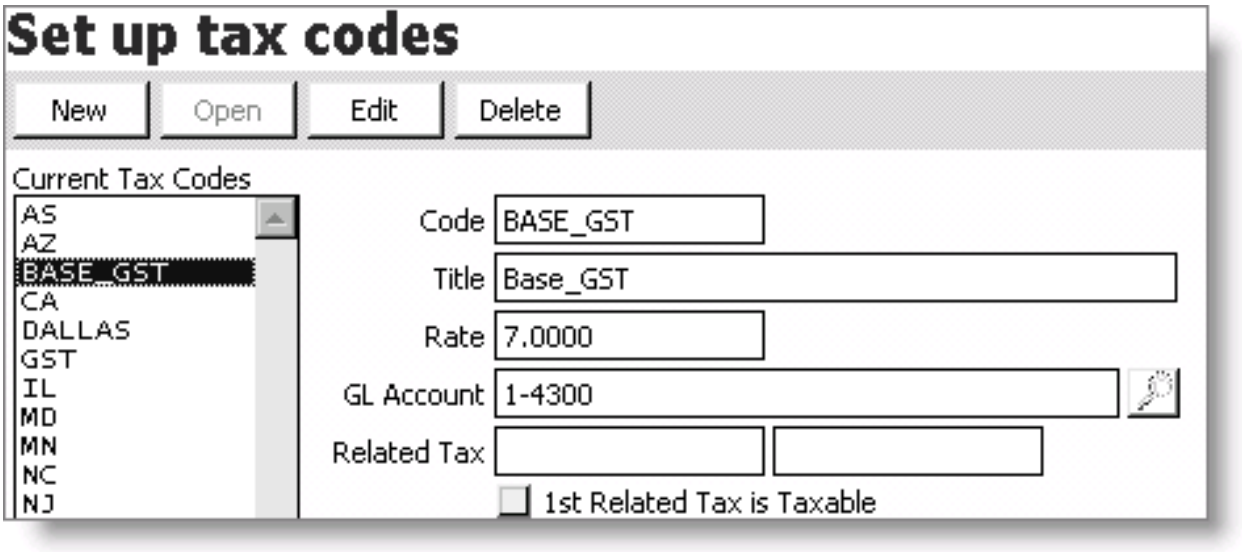
  Caution! Never use the BASE_GST as the primary taxation authority; rather, use BASE_GST as the related taxation authority to calculate the primary PST and GST. As the basis for tax calculation and tracking, the BASE_GST must contain the correct rate and GL account.

  Here is an example of how you might define tax codes across provinces (verify current rules before implementing your codes):

BASE_GST	Base GST		5	GST	
GST	GST				BASE_GST
BASE_HST12	HST 12%		12	HST	
BASE_HST13	HST 13%		13	HST	
BASE_HST15	HST 15%		15	HST	
BC	British Columbia	HST at 12%			BASE_HST12
AB	Alberta	GST at 5%			BASE_GST
SK	Saskatchewan	GST at 5%, PST at 5%	5		BASE_GST
MB	Manitoba	GST at 5%, PST at 7%	7		BASE_

				GST	
ON	Ontario	HST at 13%		BASE_HST13	
QC	Quebec	GST at 5%, PST at 7.5%, GST taxed	7.5	BASE_GST	Enabled
NS	Nova Scotia	HST at 15%		BASE_HST15	
NF	Newfoundland	HST at 13%		BASE_HST13	
NB	New Brun-swick	HST at 13%		BASE_HST13	
PE	Prince Edward I.	GST at 5%, PST at 10%, GST taxed	10	BASE_GST	Enabled
YT	Yukon	GST at 5%		BASE_GST	
NT	NW Territories	GST at 5%		BASE_GST	
NU	Nunavut	GST at 5%		BASE_GST	

Set up tax codes window



- Current Tax Codes - Lists the current tax codes.
- Code - Enter an abbreviation you want to assign to a tax code.
- Title - Enter the title of the current tax code.
- Rate - Enter the tax rate of the current tax code.
- GL Account - Enter the General Ledger account number assigned to the tax code. Select the lookup icon to search for an account number.
- Related Tax - Use these fields to enter multiple tax codes. Enter the codes for any other taxes you want to relate to the tax defined in the Code field.
- 1st Related Tax is Taxable - Enable to make the first Related Tax field taxable. The option displays only if the Canadian taxation method is enabled for the Default Organization.
- Print button - Lets you print the Tax Table Listing report of the defined tax codes, descriptions, rates, and GL accounts.

  To define BASE_GST

  You will need to define a code for the base national Goods and Services Tax (GST). The BASE_GST is used as the related taxation authority when calculating the primary GST

and PST. Because it is the basis for tax calculation and tracking, the BASE_GST must contain the correct rate and GL account number.

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Define a Code, Title, and tax Rate for the BASE_GST tax code.
4. Enter the GL Account number (select the lookup icon to look up the account). Do not enter a Related Tax because this is the base tax.
5. Click Save.

To define BASE_HST

You will need to define a code for the base Harmonized Services Tax (HST). The BASE_HST is used as the related taxation authority when calculating tax for provinces using HST. Because it is the basis for tax calculation and tracking, the code must contain the correct rate and GL account number. For multiple rates, create additional codes: BASE_HST12, BASE_HST13, BASE_HST15 (for 12%, 13%, and 15% respectively).

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Define a Code, Title, and tax Rate for the BASE_HST tax code.
4. Enter the GL Account number (select the lookup icon to look up the account). Do not enter a Related Tax because this is the base tax.
5. Click Save.

To define Primary GST

Enter a code for the Primary GST. Since the Primary GST relates to the BASE_GST, no GL account number or rate should be entered.

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.

2. Click New.
3. Enter a Code and a Title for the provincial tax code.

   Note: Leave the Rate and GL Account fields blank.
4. Enter the BASE_GST in the first Related Tax field.
5. Click Save.

   To define a provincial tax code (PST)

   Enter a code for each province for which taxes will be calculated. A provincial tax code is cross-referenced as the primary taxation authority for an organization, so you will need to enter both a rate and a GL account number. In addition, the base national GST will need to be entered as a related tax.

   For provinces for which the base national GST is taxable, enable the 1st Related Tax is Taxable option. Provincial Sales Tax (PST) then will apply to the base national GST.

   Some organizations may require provincial tax codes for multiple provinces:

- Organizations using Multi-Warehousing (Orders only)
- Organizations with offices in multiple provinces

  Note: Organizations that do not charge provincial taxes, such as Australian and New Zealand organizations and PST exempt Canadian organizations, do not need to define provincial tax codes.

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Define a Code, Title, and tax Rate for the provincial tax code.
4. Enter a GL Account number (select the lookup icon to look up an account).
5. Enter the BASE_GST tax code in the first Related Tax field.

6. (optional) For provinces for which the base national GST is taxable, enable the 1st Related Tax is Taxable option.
7. Click Save.

Defining the default tax authority

After the Canadian tax codes have been defined, enter the default tax authority that will be used by the default organization using Canadian taxation.

To define the default tax authority

1. From Customers, select Set up tables > Country names to open the Country names window.
2. If adding a new country:

- Click New.
- Enter the name of the Country.
- Enter the country's Mail Group.
- Accept the default Address Format.

If updating an existing country:

- Click Edit.

3. Enable the Use Taxation option.
4. Click Save.
5. (optional) To change the address format, click Address Layouts to open the Country Address Layouts window and set up the format.
6. Close all windows, and restart iMIS for the changes to take effect.

Defining the GSTINC tax authority (AUS, NZ)

The GSTINC tax code is a special tax authority for clients in countries other than Canada (notably Australia and New Zealand) that use the Canadian taxation method for

calculating taxes and include the GST tax in the advertised unit price of products and events.

The GSTINC tax authority assumes a product's advertised price already includes applicable taxes. When the GSTINC tax authority is applied, taxes are extracted from a product's advertised price when an order is entered. For example, a product with an advertised purchase price of 150.00 that includes a 12.5% GST tax will have a unit price of 133.33 with a sales tax of 16.67.

Both the GSTINC and Primary GST tax codes have similar functionality, and both tax codes are set up exactly the same way. The difference between the two is that GSTINC extracts calculated taxes from advertised product prices rather than calculating and adding taxes to product prices.

To define the GSTINC tax code

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Enter GSTINC for the tax Code.
4. Enter a Title for the GSTINC tax code.

   Note: Leave the Rate and GL Account fields blank.
5. Enter the BASE_GST in the first Related Tax field.
6. Click Save.

Which tax code to use as the default?

How you define the prices and taxes for your individual products determines which tax code you define as the default tax authority. Organizations within some countries calculate taxes for product prices and then add the taxes into the advertised price of the products; advertised product prices include any applicable taxes.

- If your organization's policy is to include GST tax in the advertised product price (inclusive), then set GSTINC as the Tax Authority for the Default Organization on the

Organization Names window (select File > System Setup, and click Organization Names).

- If your organization's policy is to not include GST tax in the advertised product price (exclusive), then set GST as the Tax Authority defined for the Default Organization on the Organization Names window.

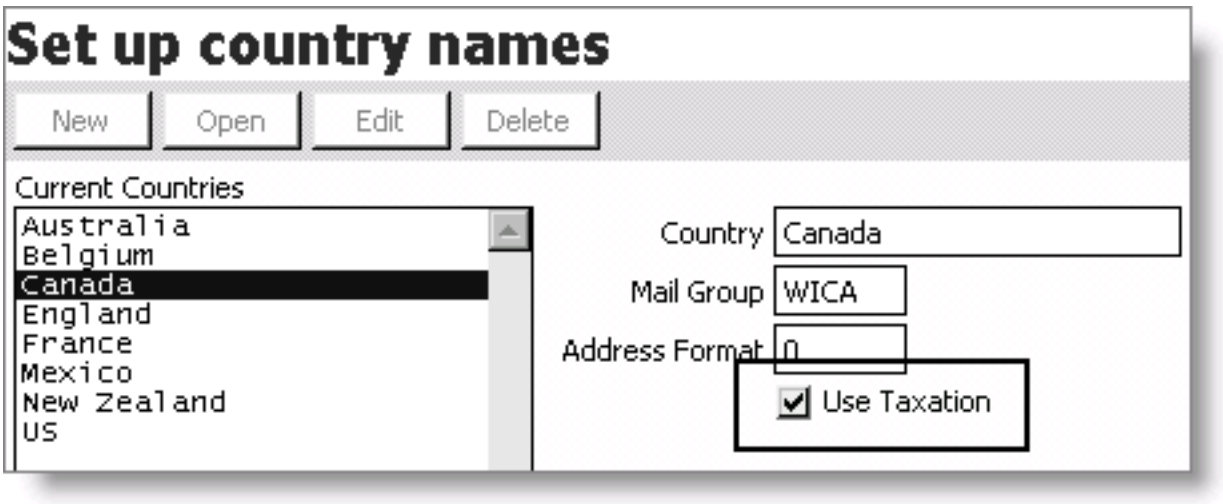
Enabling Canadian taxation for countries

When setting up GST and PST calculations for Orders, you must enable Use Taxation for each country for which taxes are collected. To enable GST taxation for individual countries, enable the Use Taxation option on the Country names window.

When the Use Taxation option is enabled for a country, GST and PST taxes (Canadian) are calculated for orders that ship to customers within that country. If you ship orders to customers in multiple countries that use the Canadian taxation method, enable the Use Taxation option for each of those countries.

To enable taxation for a country

1. From Customers, select Set up tables > Country names to open the Country names window.



2. If adding a new country:

- Click New.
- Enter the name of the Country.
- Enter the country's Mail Group.
- Accept the default Address Format.

If updating an existing country:

- Click Edit.

3. Enable the Use Taxation option.
4. Click Save.

   Note: If you want to use or set up a different address format, click Address Layouts after completing this procedure to open the Country Address Layouts window and set up the format.
5. Exit and restart iMIS.

Applying Canadian taxation to Events

Canadian taxation for Events involves applying appropriate taxes to individual events and event functions. After defining GST/HST tax codes using the Canadian taxation selection in the Organization Names window, you can enter the tax codes for your individual events and event functions.

Because services are consumed in the country in which they are delivered, all customers are considered taxable. Only customers with a nontaxable status are exempt.

Note: Once you register a customer for event functions designated as GSTINC, you cannot change that registrant's Tax Authority on the Register a customer - Attendee tab until you un-register the customer from the GSTINC functions.

To assign taxation to an event

1. Ensure that the following setup tasks are complete:

- Enable the Canadian taxation method for the default organization.
- Define the GST, HST, and PST tax codes as needed.
- Define the default tax authority.

2. From Events, select Define an event to open the Define an event window.
3. Double-click the event to open it in the Define an event window.
4. Click Edit.
5. Enter the default tax authority code in the Tax Authority field, or select the field's lookup icon to search for a tax code.
6. If appropriate (such as for a virtual event), enable Tax by address.

   Tax by address causes the appropriate tax to be charged based on the province specified in the registrant's Preferred Shipping Address. If that is unavailable, iMIS defaults to the tax authority of the event. Registrants see the HST amounts itemized in their carts and receipts.

   Note: Events not using Tax by Address still charge tax using the event's tax authority, and iMIS respects the Tax Exempt designation on the Name Fin tab.
7. Click Save.

   To assign taxation to an event function

1. From Events, select Define an event to open the Define an event window.
2. Double-click the event that uses GST taxation to open the event in the Define an event window.
3. Double-click the function to open the Event Function Detail window.
4. Click Edit.
5. Enable the GST/HST and/or PST taxable option(s).
6. Click Save.

When a customer registers for an event function, the system will automatically calculate the tax based upon the tax options you have defined for the specific function.

Applying Canadian taxation to Orders

GST calculation for Orders involves enabling Canadian taxation method option for countries and applying GST taxes to product categories, individual products, and freight and handling charges.

Freight and handling taxes are charged in addition to any other taxes that are applied to products sold in the country using GST calculation, and freight and handling taxes are calculated on both taxable and nontaxable product purchases.

Which tax authority to use?

When processing orders using Canadian taxation, the Ship to Address's country and state/province determine which tax authority is used for calculating taxes:

- If the Use Taxation option is enabled for the Ship to Address's country on the Country names window, verify whether the Ship to Address's state/province code matches a tax code defined on the Set up tax codes window:
- If a match exists, select the Ship to Address's state/province code for the order's Tax Authority on the Enter and edit orders window.
- If a match does not exist, set the order's Tax Authority on the Enter and edit orders window to equal the Tax Authority defined for the Default Organization on the Organization Names window (normally, this is the tax code defined for the Primary GST).
- If the Use Taxation option is not enabled for the Ship to Address's country on the Country names window, leave the order's Tax Authority field blank on the Enter and edit orders window. No taxes will be charged.
- For orders for which no country is defined for the Ship to Address, the assumption is that the Ship to customer shares the same home country as the organization and therefore is taxable. For a Ship to Address for which no country is defined, verify whether the Ship to Address's state/province code matches a tax code defined on the Set up tax codes window:

- If a match exists, select the Ship to Address's state/province code for the order's Tax Authority on the Enter and edit orders window.
- If a match does not exist, set the order's Tax Authority on the Enter and edit orders window to equal the Tax Authority defined for the Default Organization on the Organization Names window (normally, this is the tax code defined for the Primary GST).

Before you begin

Ensure that the following setup tasks are complete:

1. Enable the Canadian taxation method for the default organization.
2. Define the GST and PST tax codes.
3. Define the default tax authority.

To apply taxation to a product in AR/Cash

1. From AR/Cash, select Set up tables > Products to open the Set up products window.
2. Select a product code from the list of Current Products.
3. Click Edit.
4. Enable the Taxable (GST) and/or Taxable (PST) options.
5. Click Save.

To apply taxation to a product category

Caution! Tax settings at the product level override those at the category level. That is, if you enable taxes for a category but not for a product in that category, no taxes are calculated; if you disable taxes for a category but enable them for a product in that category, taxes are calculated.

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Select a product category from the list of Current Categories.
3. Click Edit.

4. Enable the Taxable (GST) and/or Taxable (PST) options.
5. Click Save.

To apply taxation to a single product

1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product code from the list of Current Products.
3. Click Edit.
4. Enable the Taxable (GST) and/or Taxable (PST) options.
5. Click Save.

To apply taxation to freight and handling charges

1. From Orders, select Set up module to open the Set up module window.
2. Click Add-on Charges to open the Add-on Charges window.
3. Click Edit.
4. Enable the Apply Sales Tax to Freight Charges and Apply Sales Tax to Handling Charges options.
5. Click Save.

Modifying reports for Canadian taxation

Certain standard reports and invoices must be edited so that Canadian taxation information (such as GST and HST) displays on a report. For Orders or Events invoices, you must clone the invoices and modify the parameters to show the Canadian tax rates on the invoice.

To modify reports and invoices

1. In iMIS, select Utilities > Report Specs to open the Report Specifications window to clone and change the following reports:

- MEETING – Confirmations – Confirmation Letter (Omnis only)
- MEETING – Invoices – Print Invoices (both)
- (Simple Order Entry only) SIMPLEOE – Invoices – Print New Invoices (both)
- Order-Invoices-Activity Menu Items (both)

2. Scroll and select the report.
3. Click Clone.
4. Tab to the Title field.
5. Add a period (.) in front of the title.

   Note: Putting a period at the beginning of the title places the report first in the alphabetical report category, making it the default report used.
6. In the Title field, modify the title to distinguish it from the original.
7. Click Parameters to open the Detail Report Parameters window.
8. In the Parameters text box, enter the text and field contents (press Enter after each line).

   The information you enter in the Parameters text box will depend on your organization's specific tax setup. The following text and field contents are examples of the PST as the tax authority and the GST as the first related tax:

   Total PST:[Orders.TAX_1]

   Total GST/HST:[Orders.TAX_2]

   GST/HST Remittance Number:[Org_Control.GSTRemitNumber]

   Note: If the <<Message>> line displays in the Parameters text box, do not delete it: doing so prevents the lines below it from printing on the invoice.

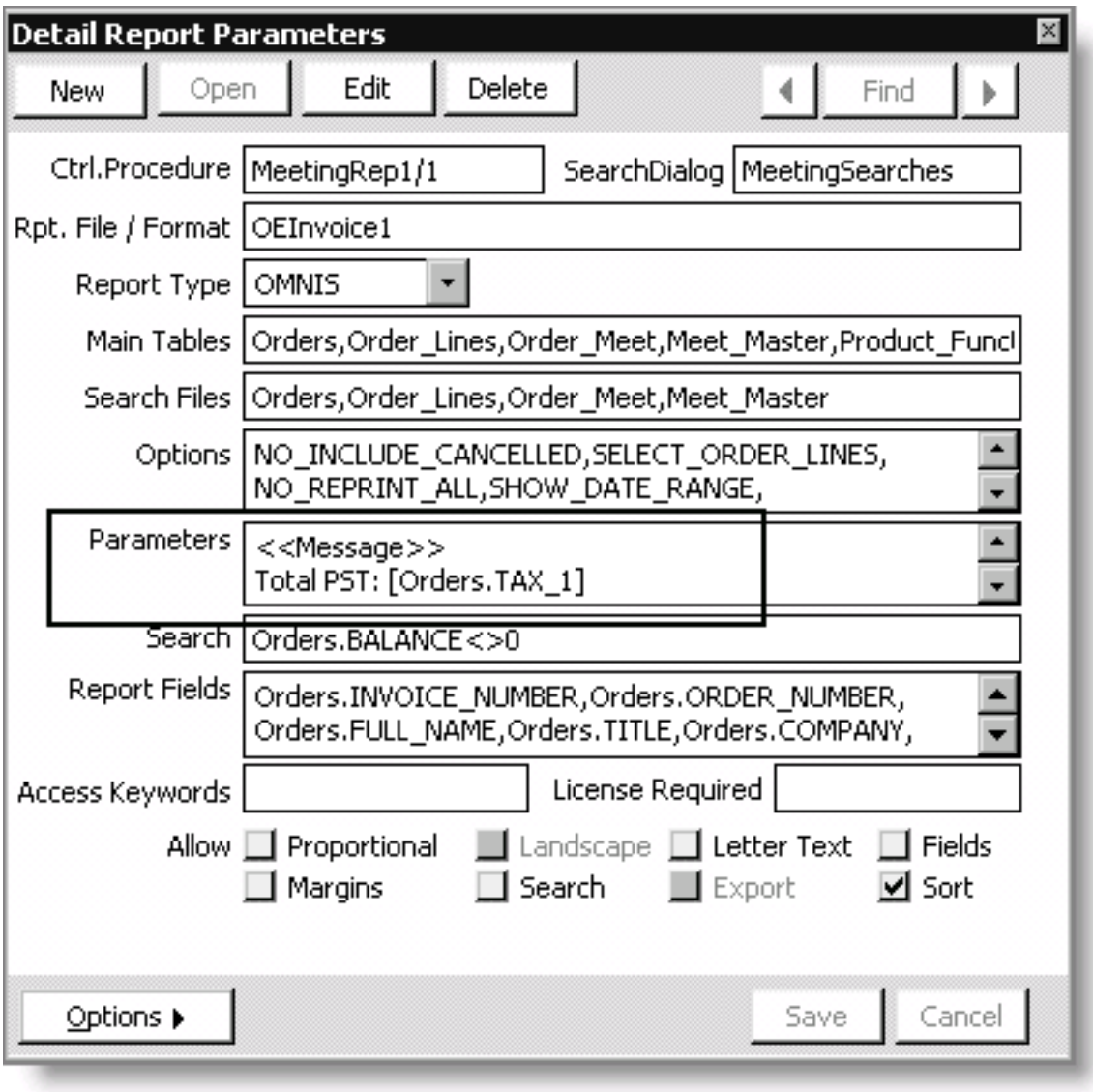
   Note: Tax_1 will print the tax calculated for the tax authority entered. Tax_2 will print the first Related Tax. Tax_3 will print the second Related Tax from the Tax Codes table for

the Tax Auth used on the order. Org_Control.GSTRemitNumber will display the GST Remittance # on the Organization Names window.

9. Click Save.

For invoice reports, the following information displays at the bottom of the invoice:

- Total PST
- Total GST/HST
- GST/HST Remittance



European Taxation (VAT)

Value-Added Tax (VAT) is a tax levied on goods and services sold within the European Union (EU). iMIS supports VAT, so you can tailor your organization's taxation method for the EU member countries in which you have operations. Applicable taxes then will be calculated automatically based on a customer's country.

Including and showing VAT

To charge VAT, you multiply the net price by the VAT rate (to calculate how much VAT to charge) and then add that amount to the net price to give the 'gross' (inclusive) price:

Net price = £100

+ VAT due at 20% = £20

= Gross price = £120

When is VAT included in the price? — Almost always. By law, the prices advertised in retail shops must include VAT, so no additional tax is charged at checkout. Products advertised in magazines, catalogs, websites, price lists, and other literature may be aimed at the public, businesses, or both. By law, if they are meant only for the public, then prices must include VAT. If they are meant for both public and business, then VAT-inclusive prices are usually given.

Exception: Prices quoted between organizations (companies) are often VAT exclusive, because VAT might be claimed back by a company and so should not affect the budget.

When is VAT shown on bills and receipts? — Most retail prices on bills and receipts include VAT, so it is not shown separately. However, some may list the VAT as a separate line, just to report how much tax is included in the price. Invoices from VAT-registered suppliers (like builders) must show a separate amount for VAT, as well as the VAT Registration Number of the business.

To specify whether you want VAT-inclusive or VAT-exclusive pricing, you enable a setup option in AR/Cash. See Configuring VAT options in AR/Cash.

Configuring iMIS for VAT

Note: VAT has a separate license key. You must be licensed for VAT to enable it as a taxation method.

Implement your VAT configuration in the order documented below:

1. Enabling VAT for the default organization – gives you access to the VAT options in iMIS.

   Note: Enabling VAT automatically disables the Default or Canadian taxation method for an organization. The VAT and Canadian taxation methods are mutually exclusive.

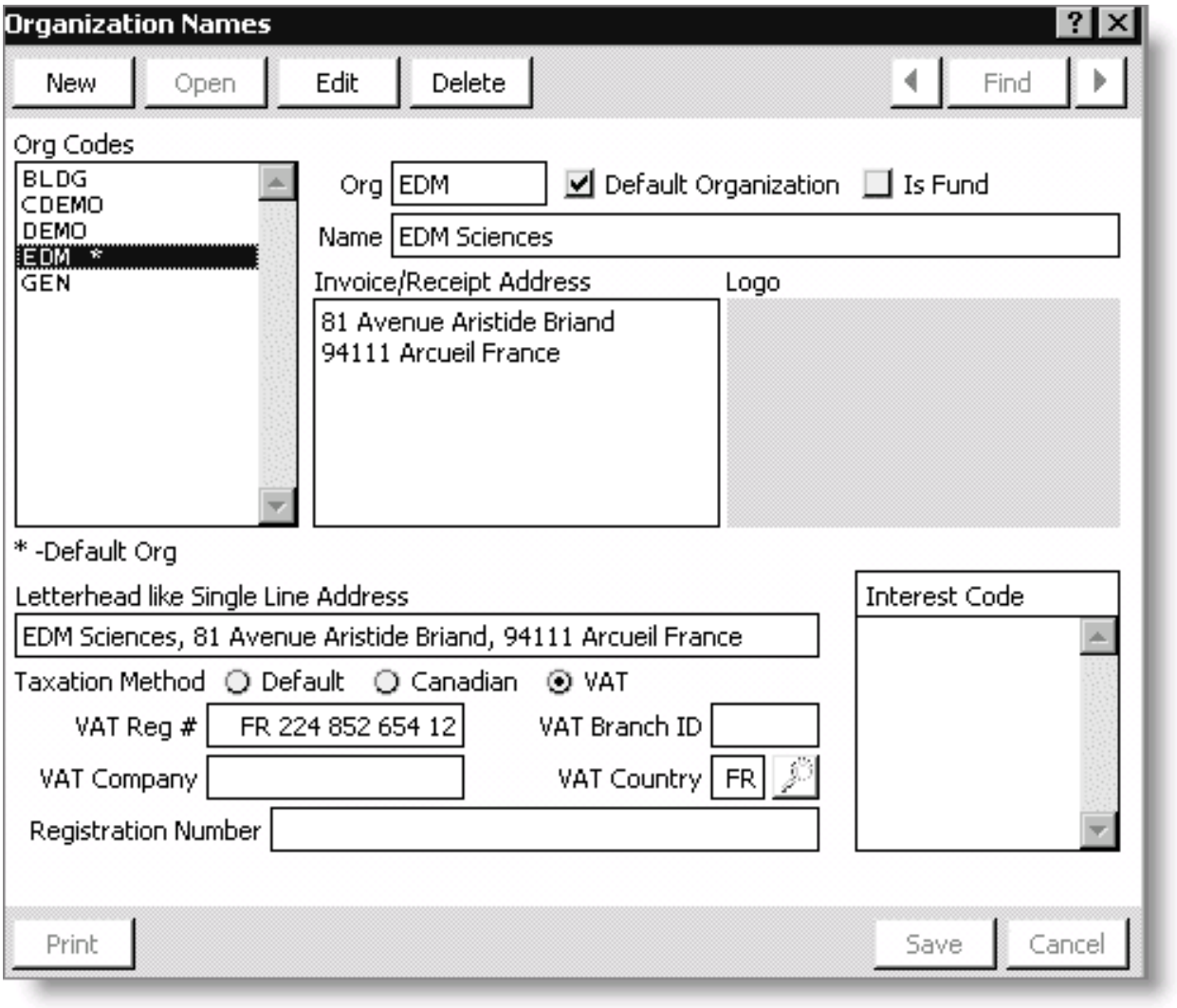
2. Defining VAT and intrastate country codes – lets you verify that the codes are correct for your needs before you do any configuration based on this table.
3. Defining VAT tax codes – lets you set up the tax codes that you need iMIS to use. If these tax codes are missing from the Product_Tax table, any taxes calculated equal zero.
4. Configuring financial entities for VAT – lets you set company information (such as registration codes and numbers) for each organization that will collect VAT.
5. Setting up Company Flow Down for VAT – so that VAT tab data for the company contact flows down to company members.
6. Configuring VAT options in AR/Cash – lets you select options for calculating taxability and including VAT in pricing and fees.
7. Defining VAT Rules for Events – lets you add special rules for your virtual and other-country events.
8. Finally, verify that the Default country for your website (System Setup > Set up web components > General configuration) matches the VAT Country you selected for your Default Organization in Desktop System Setup.

Enabling VAT for the default organization

Before you can configure iMIS to handle VAT for your organization, you must select VAT as a Taxation Method for your Default Organization on the Organization Names window. After that, you can create the specific VAT tax codes used by the different areas of iMIS.

After enabling the VAT taxation method, be sure to restart iMIS for the change to take effect.

Note: VAT has a separate license key. You must be licensed for VAT to enable it as a taxation method.

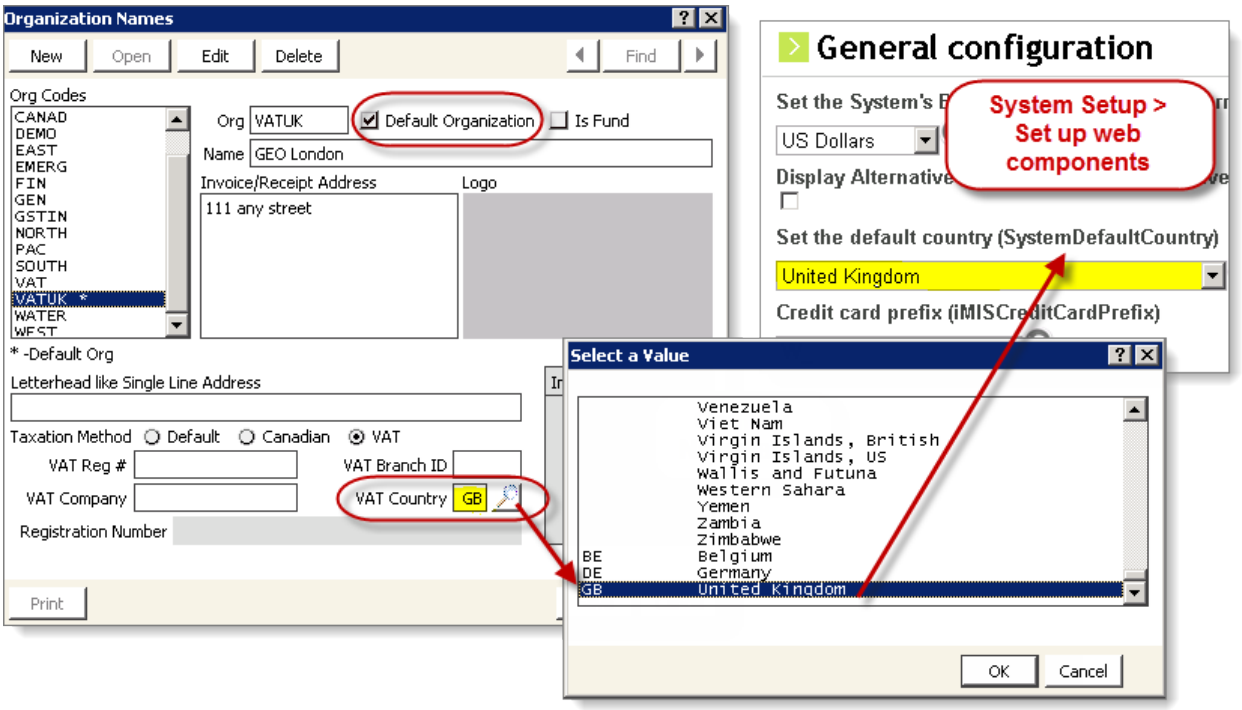


- Default Organization - (required) Enable to identify the organization using VAT as the default organization. If the organization using VAT is not designated as the Default Organization, the VAT taxation method will not be implemented. An asterisk displays to the right of the default organization in the Org Codes list.

- Taxation Method: VAT – (Displays only if you are licensed for VAT) Enable to use the VAT taxation method. The following fields display when the VAT taxation method is enabled:
- VAT Reg # – Enter the numeric part of an alphanumeric VAT number. Length and structure will vary depending on country. For example, FR 224 852 654 12 is used in France and BE 422 544 865 is used in Belgium.
- VAT Branch ID – (optional) Enter the VAT branch ID for an organization.
- VAT Company – (optional) Enter the VAT company for an organization.
- VAT Country – Enter the alphabetic part of an alphanumeric VAT number that corresponds to the EU member country of the organization. Select the lookup icon to look up a country from those defined in the Country Names table.

  Important: If the lookup populates the wrong VAT Country code, you first need to fix the entries in your Country Names table and then update the entry here.

  Troubleshooting tip: The country that you set for your Default Org must match the System Default Country that you specify for your website:



- Registration Number - (optional, Fundraising) Enter the registration number associated with an organization or fund. Fundraising organizations must have a registration number (Canada) or tax identification number (United States) to claim and verify tax-exempt status.

To enable VAT for the Default Organization

1. In Desktop, select File > System Setup, Organization Names to open the Organization Names window.
2. If adding a new organization:

- Click New, and enter a code for the organization in the Org field.

If updating an existing organization:

- Select an organization from the Org Codes drop-down list and click Edit.

3. Enable the Default Organization option.
4. Enable the VAT taxation method option.
5. Click Save, close all windows, and restart iMIS for the changes to take effect.

Defining VAT and intrastate country codes

The VAT country code is a two-character code assigned to each European member country. The intrastate code is a country code that is used on intrastate reports. These reports list the transactions between an organization and customers from EU member countries.

Note: Both the VAT country code and the intrastate code must be defined in iMIS for EU member countries.

To define a country code

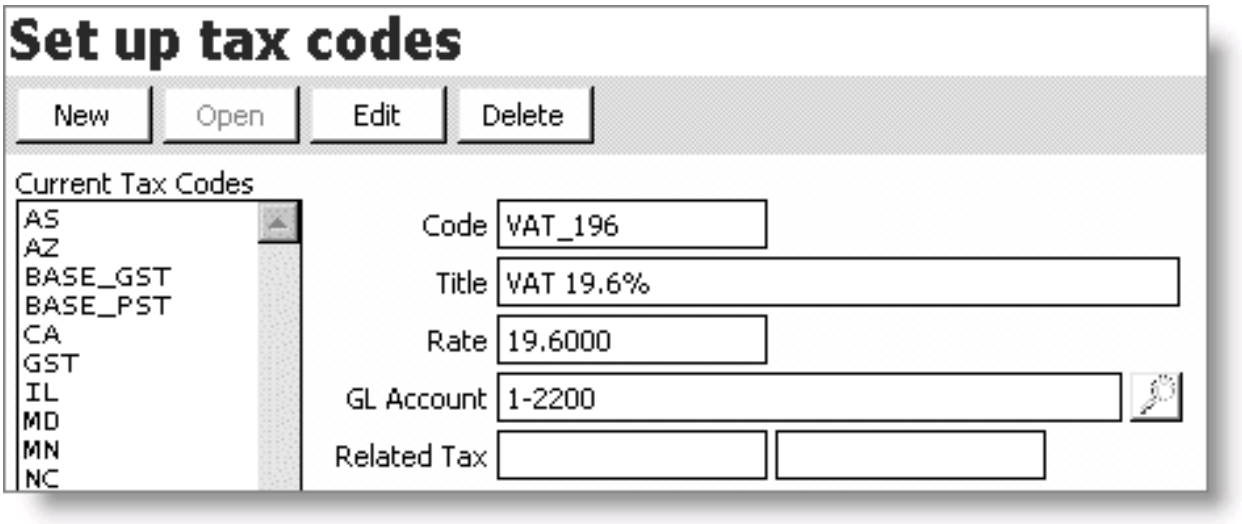
1. From Customers, select Set up tables > Country names to open the Country names window.
2. Click New.
3. Enter the name of the country in the Country field.

4. Enter the country's Mail Group.
5. Accept the default Address Format.

   Tip: To set up a different address format, click Address Layouts after completing this procedure to open the Country Address Layouts window and set up the format.
6. Enter the country code in the VAT Country field. This code is used for VAT.
7. Enter the country code in the Intrastate Code field. This code is used for reporting purposes.
8. Click Save, close all windows, and restart iMIS for the changes to take effect.

Defining VAT tax codes

If you are using different VAT tax rates, you must define the different rates in iMIS before you can apply them to any type of event, product, or order. You do so in the Set up tax codes window. The following sections include examples of various VAT tax codes.



- Current Tax Codes - Lists the current tax codes.
- Code - Enter the abbreviation you want to assign to the tax code.
- Title - Enter the title of the current tax code.
- Rate - Enter the tax rate of the current tax code.

- GL Account - Enter the General Ledger account number assigned to the tax code. Select the lookup icon to search for an account number from the GL Account general look-up/validation table.
- Related Tax - Use these two fields to enter multiple tax codes. Enter the codes for any other taxes you want to relate to the tax defined in the Code field.

To define VAT-exempt tax codes

Different events and products may require defining different VAT rates.

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Enter VAT_EXEMPT in the Code field.
4. Enter a Title for the VAT_EXEMPT tax code.
5. Enter the GL Account number (select the lookup icon to look up the account).
6. Click Save.

To define VAT zero-percent tax codes

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Enter a Code for VAT zero-percent.
4. Enter a Title for the VAT zero-percent tax code.
5. Enter the GL Account number (select the find icon to look up the account).
6. Click Save.

To define VAT percentage tax codes

1. From AR/Cash, select Set up tables > Tax codes to open the Set up tax codes window.
2. Click New.
3. Enter a Code for the VAT tax code.

4. Enter a Title for the VAT tax code.
5. Enter a tax Rate for the VAT tax code.
6. Enter the GL Account number (select the find icon to look up the account).
7. Click Save.

Configuring financial entities for VAT

After defining the country codes, enter the country code and additional VAT information for one or more financial entities (organizations) on the Organization Names window.

To enter VAT information

1. In Desktop, select File > System Setup, Organization Names to open the Organization Names window.
2. Select an organization enabled for VAT taxation from the Org Codes list.
3. Click Edit.
4. Enter the VAT Reg # to be used to collect VAT.
5. (optional) Enter a value in the VAT Company field.
6. (optional) Enter the VAT Branch ID.
7. Enter the VAT Country code, or select the lookup icon to look up the country on the Country_Names table.

   Note: The VAT country code must be set up on the Country names window to select it at this time.
8. Repeat for any additional financial entities (organizations) as needed.
9. Click Save, close all windows, and restart iMIS for the changes to take effect.

Setting up Company Flow Down for VAT

You can enable User Defined Company Flow Down in iMIS Desktop for the VAT Reg Number, VAT Country, and VAT Exempt fields on the VAT tab if:

1. Your iMIS database includes both Company and Individual customer types, and

2. The customers of a company are linked to the company record in Customer Management.

   Company flow down is useful for pre-populating related entries with common information (such as Main Address, County, and Telephone) and other additional user-defined company flow down fields.

   To set up company flow down for VAT

1. From Customers, select Set up module > General.
2. Click Advanced to open the Customer Setup – Advanced window.
3. Click Edit.
4. In the User Defined Company Flow Down field, enter the fields to display. For example, to display all VAT fields, enter:

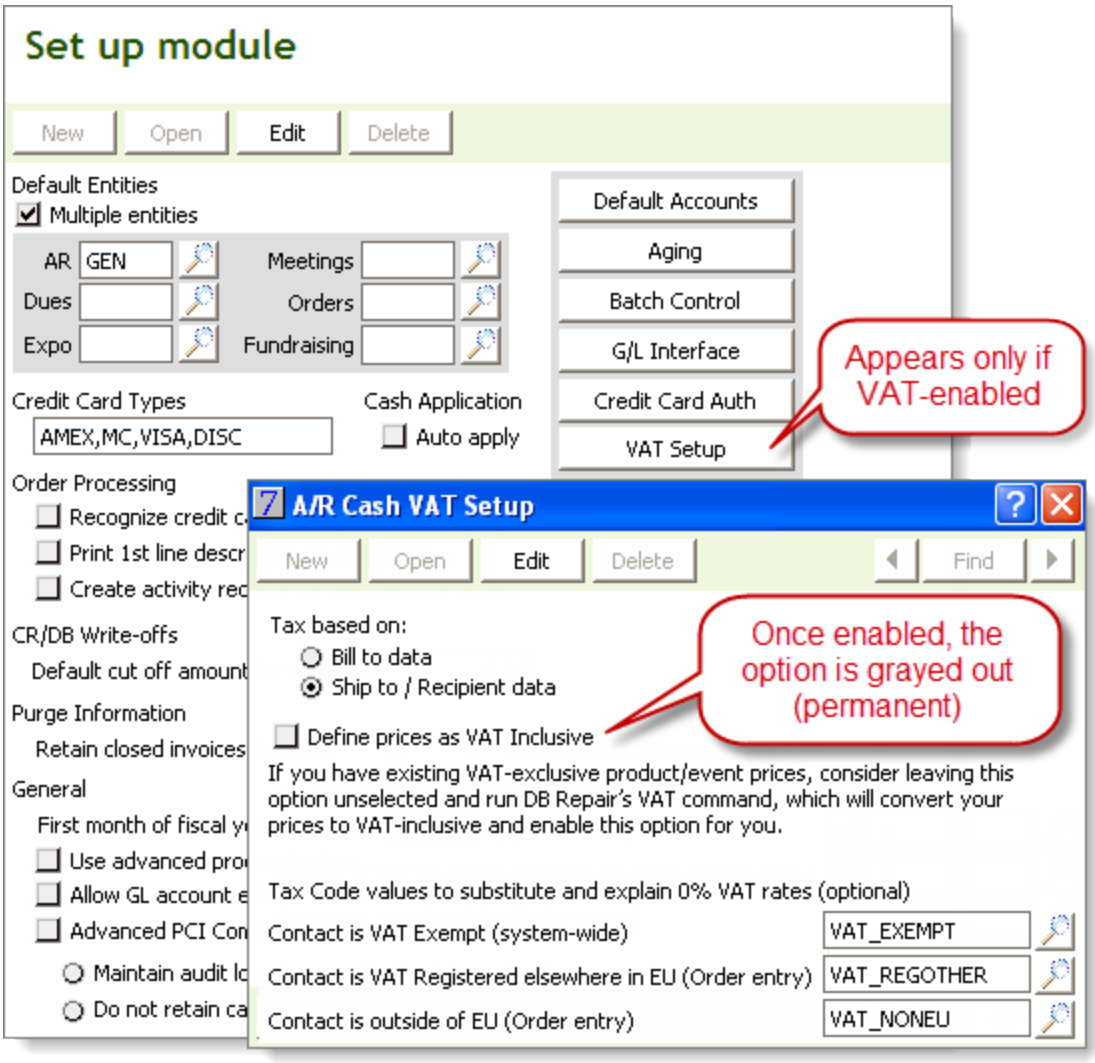
   Name_Fin.VAT_REG_NUMBER,Name_Fin.VAT_COUNTRY,Name_Fin.USE_VAT_TAXATION
5. Click Save.

Configuring VAT options in AR/Cash

Because organizations differ in how they need to charge VAT and handle pricing, iMIS gives you several global options that affect tax calculation and pricing of your order processing and events, across Desktop and the web views. These global options are set in AR/Cash.

Tip: For technical discussions and examples of VAT issues and scenarios, sign in to iMIS Community: http://www.imiscommunity.com/value_added_taxation_vat.

If your default organization is configured for VAT, then you see a VAT Setup button to the right of the AR/Cash > Set up module options:



- Tax based on: – lets you change the method for evaluating taxation.
- Bill to data – Applies VAT based on the Bill to contact's location and VAT tab settings.
- Ship to / Recipient data – (default) Applies VAT based on the Ship to location and the recipient's VAT tab settings. This supports point-of-sale requirements for which contacts have different Ship to addresses or make purchases intended for others, such as a manager registering an employee at a different site.
- Define prices as VAT Inclusive – (non-reversible) When enabled, all system-defined prices for taxable products, events, shipping, and handling are considered VAT Inclusive. This means that you can define products and registration fees with the gross (tax-

included) amounts that you will advertise to your members and the public. Once you enable VAT-inclusive pricing, the option appears grayed out, because the setting is permanent.

Tip: To upgrade quickly to VAT Inclusive pricing, back up your database and run the DB Maintenance standalone utility, whose VAT tab performs a one-time conversion of your VAT-exclusive product prices and registration fees to be VAT-inclusive. Once your data is converted, the command enables the Define prices as VAT Inclusive setting for you.

Remaining VAT Exclusive: Because some organizations need to handle order and registration prices as VAT-exclusive (such as for B2B sales), iMIS allows you to remain VAT exclusive. In this mode, all of the prices you define or override for events, products, freight, and handling are net amounts that exclude the VAT component, and iMIS adds the VAT separately during product ordering and event registration in Desktop.

Understanding VAT Exclusive:

- VAT-inclusive under the hood: Even though VAT-exclusive pricing appears the same as before, all order and registration pricing is now saved as VAT-inclusive. That is, being configured to remain VAT Exclusive just controls how you see and enter the data, converting your net amounts to and from the underlying VAT-inclusive amounts dynamically.
- Upgrading VAT-exclusive order data: Because iMIS now stores all order and order line amounts as VAT-inclusive, DB Upgrader takes care of updating all of your existing order data to be consistent with your new order data. Flags on the record ensure that the update occurs only once, and your original data is backed up (Orders_BAK and Order_Lines_BAK). This universal change to storing order amounts as VAT-inclusive is unrelated to whether you enable Define prices as VAT Inclusive.
- VAT-inclusive public prices: Even if you use VAT-exclusive pricing, the cart on your website will show your shoppers VAT-inclusive product prices and shipping/handling fees (if you enable taxing when defining add-on charges), to comply with sales tax rules. Order data is always stored VAT-inclusive.
- Tax Code values to substitute and explain 0% VAT rates (optional) – If you populate them, these optional fields help you document the reason for VAT exemptions. The look-up lets

you select from your existing zero-rated VAT tax codes to specify ones to globally substitute as "reason" codes for each of three situations: the contact is VAT Exempt, is registered in a different EU country, or is outside of the EU altogether. In the same way, Event VAT Rules also let you select a Substitute Tax Code for any rule that prevents taxation (see Defining VAT Rules for Events). These codes allow you to report and document tax exemptions as required.

Taxation based on Bill To versus Ship To

The Tax based on: options determine when iMIS does not charge VAT:

Bill to data	Ship to / Recipient data
• Billing address is outside of the EU	• Shipping address is outside of the EU
• Billing contact is VAT Exempt	• Recipient contact is VAT Exempt
• Billing contact is VAT registered in a different EU country from the order's financial entity	• Recipient contact is VAT registered in the same country as the shipping address, and the shipping address is a different EU country from the order's financial entity

Definitions:

- All orders have an associated financial entity, defined through System Setup > Organization Names. Each financial entity specifies a VAT Country.
- VAT Exempt means having the VAT Exempt option enabled on the contact's VAT tab (Customers > Manage customers).
- VAT registered requires having a VAT Registration Number specified on the contact's VAT tab. If so, whether a contact is VAT registered then depends on the tax method and the value in VAT Country:
- Bill to Data: if VAT Country is blank, the contact is VAT registered in the VAT Country of the order’s financial entity. (Exception: Web orders honor the original iMIS VAT imple-

mentation by first trying to establish the order's financial entity from product lines.)

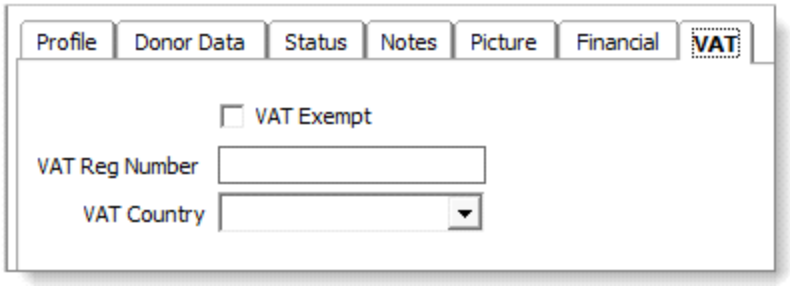
- Ship to / Recipient data: if VAT Country is blank, the contact is not VAT registered.

Here is a table that shows how VAT taxes apply to orders according to each Tax based on setting. You can substitute your EU countries for the ones used here (GB - Great Britain, BE - Belgium).

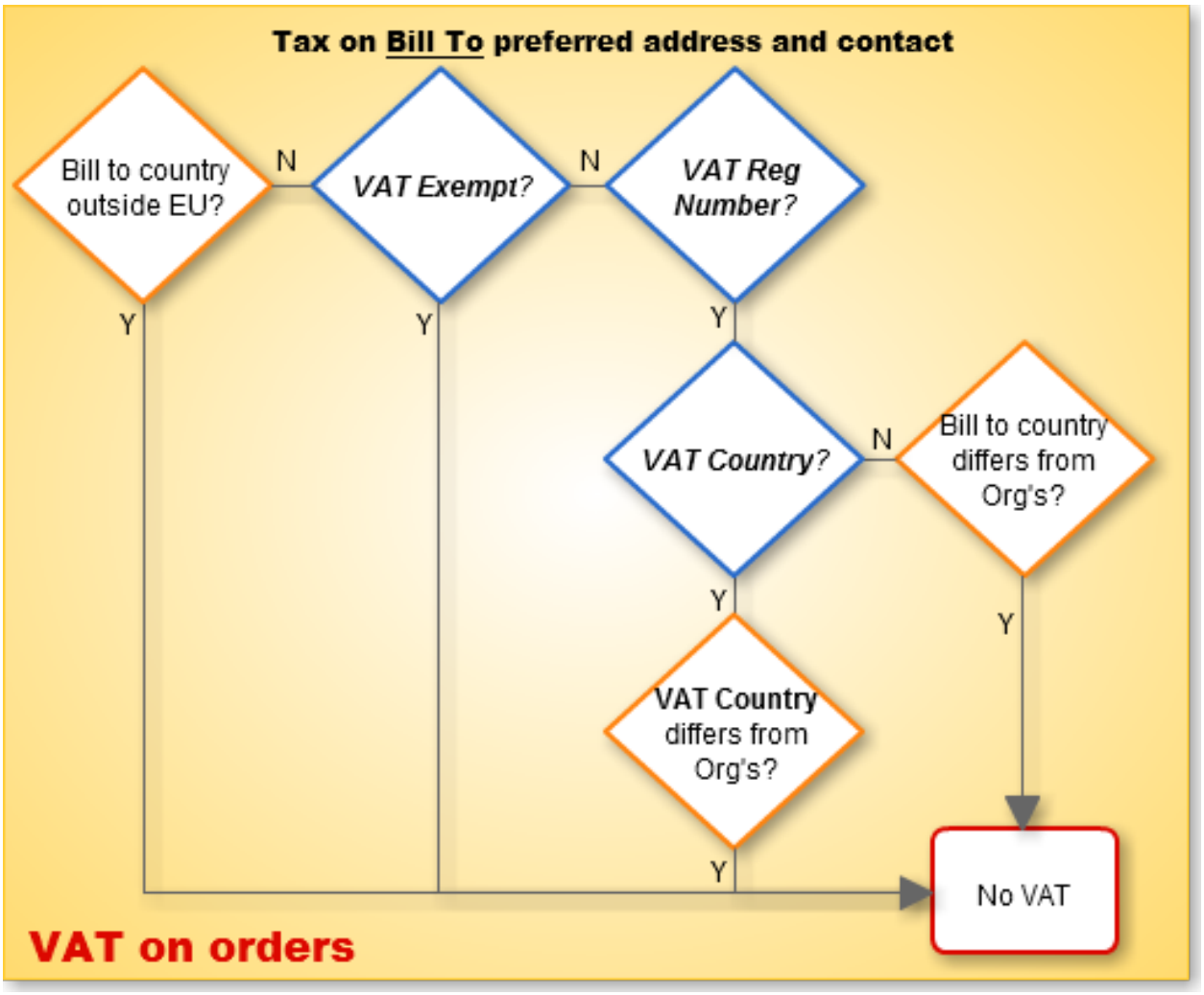
VAT Country of (*VCO*):					Taxability tests:							
Default Org	BillTo	ShipTo	Contact		Shipping outside EU?	Contact is VAT Exempt?	Contact has Registration Number?	VCO Contact differs from Default org?	VCO Contact matches Ship To?		**Bill To method**	**Ship To method**
*	*	*	*		**Yes**	–	–	–	–		No Tax	No Tax
*	*	*	*		No	**Yes**	–	–	–		No Tax	No Tax
*	*	*	*		No	No	**No**	–	–		Tax	Tax
*	*	*	*		No	No	Yes	**No**	–		Tax	Tax
GB	GB	BE	BE		No	No	Yes	Yes	**Yes**		No Tax	No Tax
GB	BE	BE	BE		No	No	Yes	Yes	**Yes**		No Tax	No Tax
GB	GB	GB	BE		No	No	Yes	Yes	**No**		No Tax	Tax
GB	BE	GB	BE		No	No	Yes	Yes	**No**		No Tax	Tax

How taxation methods use the VAT tab

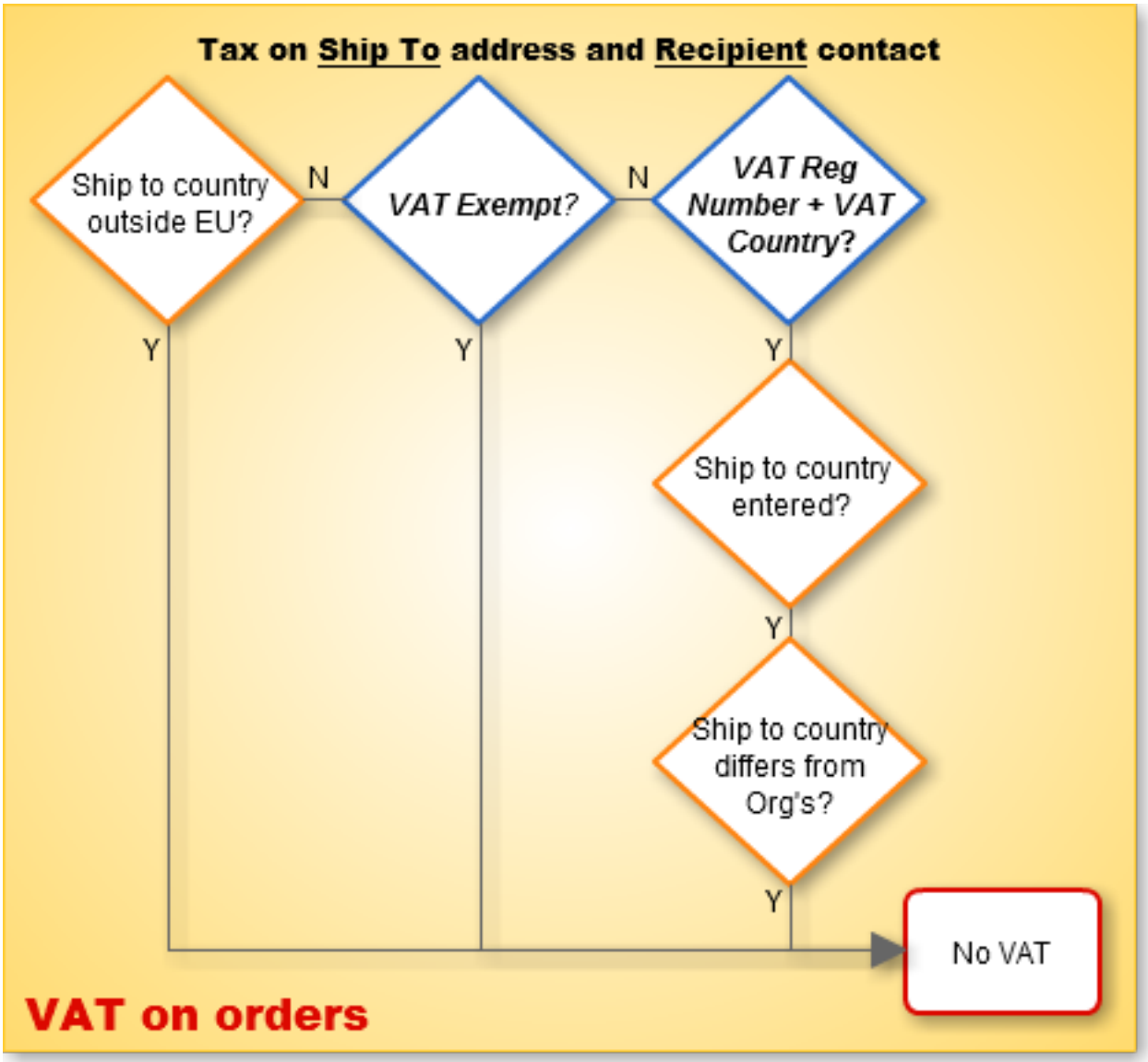
The VAT tab settings on each contact's record affect when VAT is applied:



In AR/Cash > Set up module, the Taxation section lets you choose to calculate taxes by Ship to (see Taxation based on Bill To versus Ship To). These diagrams show the essential differences in how the two methods use the values on each contact's VAT tab:



If the Bill to contact has no Preferred Billing country, iMIS assumes it is the country of the order's financial entity.



If the order has no shipping country, iMIS assumes it is the country of the order's financial entity.

iMIS calculates VAT based on Ship to just as Amazon.co.uk does, with two exceptions:

- iMIS allows each customer to supply VAT registration for one country only.
- iMIS cannot change rates based on the country to which an item is shipped.

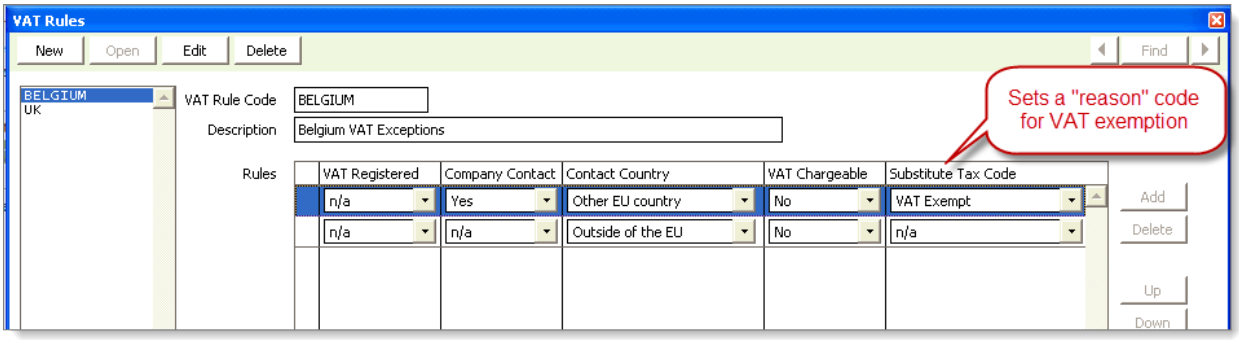
Defining VAT Rules for Events

To comply with Place of Supply requirements, you can use the VAT Rules table to define when not to charge VAT tax on taxable functions. These rules have limited scope: they only apply to taxable functions of VAT-enabled events that have a VAT Rule specified in the event's definition. These special rules are optional, and you do not need these rules at all unless your organization faces one of these situations:

- You hold online (virtual) events. The new Place of Supply rules have requirements that apply to online events, as these specifically fall into the new "General Rules" (under Article 44 and 45).
- You hold in-person events in another EU country. If you hold an event in another EU country that has different guidelines for when to charge VAT, then you need to define a new rule set.
- Your tax advisor determines that the default approach of charging VAT to all non-exempt registrants is insufficient.

Important: Consult your tax advisor or audit firm for questions and validation of your rule sets.

You can create as many rule sets as you need to handle the situations you must support, if any. In all cases, your registrants – whether registered in Desktop, Web, or Public views – see only confirmation that their fees include the required VAT taxes.



Select Events > Set up module, VAT Rules

- VAT Registered – whether the registrant has a VAT Registration number entered.

Required: Include both Name_Fin.VAT_REG_NUMBER and Name_Fin.USE_VAT_TAXATION in the User Defined Company Flow Down list, in Customers > Set up module, Advanced.

- Company Contact – a registrant whose own record or whose parent record has a member type that is defined as a Company Record in the Member_Types table.
- Contact Country – refers to the country specified in the registrant's address (regardless of parent record) as determined using the VAT country codes you defined.
- Same as place of supplier – the registrant is in the same VAT country as the event's entity.
- Other EU Country – the registrant is in a different EU country from the event's entity.
- Outside of the EU – the registrant is outside of the EU.
- VAT Chargeable – The Yes option exists for rare cases in which you need to insert a Yes rule to ensure a correct VAT charging situation isn't overridden by a more general No rule below it.
- Substitute Tax Code – This optional field is available only when VAT Chargeable is No. It lets you select one of your zero-rated VAT tax codes as the "reason" for why the situation is not taxable. Examples: the contact is VAT Exempt, is registered in a different EU country, or is outside of the EU altogether. These codes allow you to report and document tax exemptions as required.

  Where do VAT rules apply? If an event function is marked Taxable, VAT taxes can be charged. If the event itself also specifies use of a VAT Rule, iMIS determines whether to charge VAT according to your rules of exclusion.

  How do rule sets work? When a VAT event specifies a rule set, iMIS determines whether to charge the registrant VAT by testing each rule for a match. Starting with the top rule, iMIS stops only when all three conditions (whether VAT Registered, whether a Company Contact, and location) are met. If no rules are satisfied, VAT is charged as usual.

  Example rule set: Online Events

VAT Registered	Company Contact	Contact Country	VAT Chargeable
Yes	n/a	Other EU country	No

Example rule set: Belgium events in France

VAT Registered	Company Contact	Contact Country	VAT Chargeable
Yes	n/a	Same as place of supplier	No
No	Yes	Same as place of supplier	No

To set up entities for other EU countries

If you hold events within the EU but outside of your EU country, you may need to set up multiple entity processing for each country involved in order to keep your financial records separate. The issue is [1] whether you hold an event in another EU country (say, a Paris conference for your Brussels-based association) and [2] whether that country has different guidelines for when to charge VAT.

1. Define the entities (see Defining an organizational entity) for which you need to keep separate financial records.
   - Select File > System Setup, Organization Names.
   - Select New and create organizations for each additional EU country, ensuring the Taxation Method is VAT and completing the VAT fields that appear.
2. Enable multi-entity processing (see Enabling multi-entity processing).
   - From AR/Cash > Set up module, select Edit and enable Multiple Entities.
   - If needed, change the default entity for Events.
3. Define default accounts (see Defining default general ledger accounts) for your entities.
4. Set up cash accounts (see Setting up cash accounts) for your entities.
5. Set up Due To/Due From processing (see DueTo/DueFrom processing).
6. Verify the Default country for the website (System Setup > Set up web components > General configuration).

7. When defining events that need this special VAT tracking, select your new entity codes as needed.

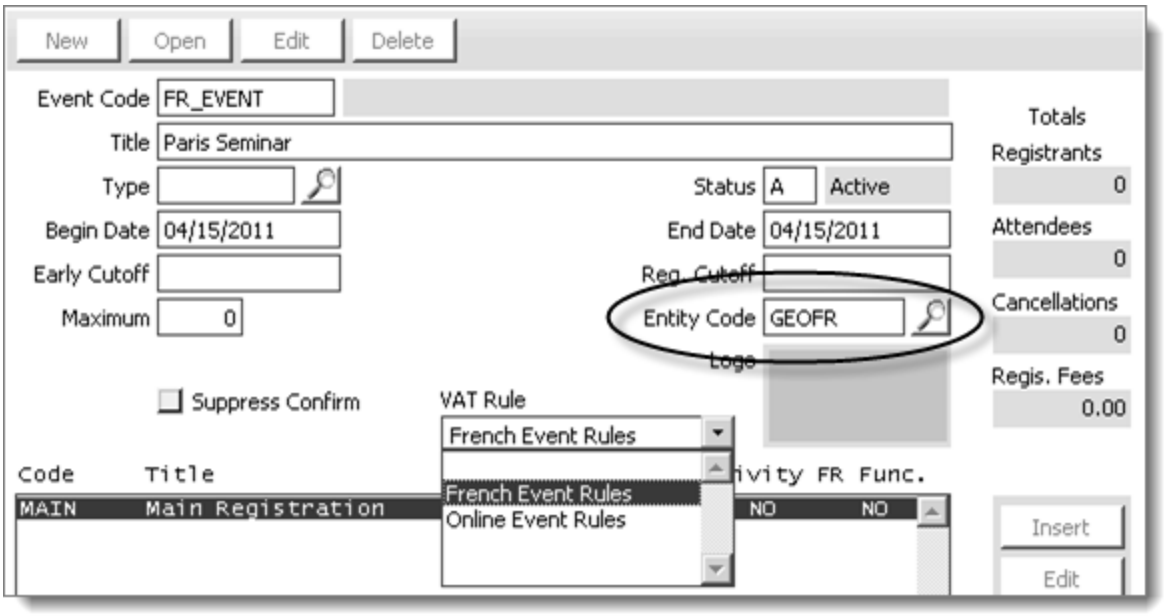
To define a set of VAT Rules

1. Open Events > Set up module, VAT Rules and select New.
2. Create a VAT Rule Code; add a Description (optional) to explain the rule set and to display in the drop-down list during Event definition.
3. Change the n/a (not applicable) defaults to Yes and No as needed to define the test for evaluating the taxability. The n/a values behave as “either Yes or No” in the evaluation.
4. Select Add to activate rows for any additional rules you need; note that Delete removes only the row that is currently highlighted.
5. Use Up and Down to arrange the rules in the order you want them to evaluate, from the top.
6. Select Save, then close the window or select New to create another rule set.

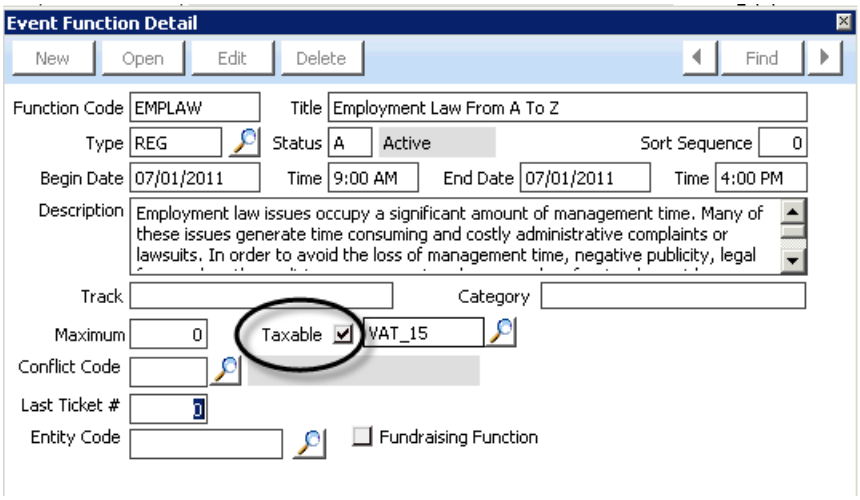
To apply VAT Rules

Each event can use one set of rules that you defined for its taxable functions, but the registration process still lets you override function-level tax codes.

1. Select Events > Define an event, select New or Edit, and select the correct VAT Entity Code for the accounting of these transactions.
2. Apply a VAT rule set to your VAT event: select a VAT Rule from the drop-down list.



3. When defining each event function, enable the Taxable option as appropriate.



4. During registration, be aware that in some cases (such as when a registrant's company is VAT Exempt), enabling Add to master during registration causes taxes to be recalculated on functions, changing their cost.

   If this happens, you are prompted to click OK, confirm the registration details, adjust the payment amount as needed, then click Save.

How VAT Rules test Contact Country

The tests for Contact Country are the most involved part of VAT Rules. Unless the selection is n/a, the country of the registrant's address evaluates as follows:

- Which address is evaluated? The test uses the country associated with the registrant's address, which appears on the Attendee tab of Event registration (Desktop) or on the Registrant page (Web), on the first step of the registration process. This address defaults to the registrant's preferred mail address, but the criteria evaluation always uses the address as it appears in the user interface, including any manual address overrides.
- Is the registrant outside the EU? If the registrant's country is not assigned a VAT Country Code in the Country Names table, then the country is considered to be outside the EU.
- Is the country blank? If the registrant's country is not populated, then it is assumed to be the same as the country of the "default organization". The default organization's country is established according to the VAT Country Code assigned to it.
- Is the registrant within the EU? The registrant's country is considered in the EU if either:
- The registrant's country is populated and the country is assigned a VAT Country Code in the Country Names table, or
- The registrant's country is not populated and the registrant's location is assumed to be the same as that of the default organization.
- What is the supplier country? If the registrant's country is determined to be within the EU, then the registrant's country is either the same as the supplier country or a different country. For this evaluation, iMIS must know what the supplier location is (i.e., which normally means the location from which the event is hosted). The following logic derives the EU Country to be used as the supplier location:
- If the event is assigned an entity (which should be the case if the event is being held in a country other than the home country of the organization), the supplier location is set to the VAT country code for that entity.
- If the event is not assigned an entity, then the supplier location is set to the VAT country code of the "Default Organization".

- Is the Registrant's country the same as place of supplier or elsewhere in EU? Once the registrant's country is determined to be in the EU and the supplier country location is known, then this test is simple. If the VAT Country Code associated with the registrant's address matches the VAT Country Code associated with the event supplier location, then the registrant location is considered "Same as place of supplier". If the VAT Country Codes do not match, then the registrant location is considered in an "Other EU country".

Examples of VAT Rules

Important: These examples show how to define and use VAT rules; do not take this as tax advice.

For these examples, assume you have a home base in the United Kingdom (default org has VAT enabled and VAT Country is GB) and you have three upcoming events where your tax advisor has given three different VAT treatments:

- In-person event in UK – All registrants (except those flagged as VAT Exempt), regardless of location, should pay VAT. No VAT Rule is needed; let the default VAT treatment apply.

  Rule: None; the VAT Rule drop-down should remain blank when the event is defined.

- Online event –Following the "General Rule" under Articles 44 and 45, the tax advisor has said that, in addition to those flagged as VAT Exempt (who are never charged VAT under any circumstance), all registrants who are VAT Registered and in an EU country other than that of the default organization should be excluded from VAT. All others, including those in the same country and those outside of the EU, should be charged VAT.

  Rule: Create a rule with a single criteria line only:

VAT Registered	Company Contact	Contact Country	VAT Chargeable
Yes	n/a	Other EU country	No

- Event in France – The French guidelines for this event state that all companies as well as those who are VAT registered and who have a French address should not be charged VAT. All others, except for those flagged as VAT Exempt, should be charged VAT.

  Rule: Since the guidelines allow for either a Company Contact or a contact whose VAT Registration Number is populated to be excluded, create a rule with two rows:

Yes	n/a	Same as place of supplier No
n/a	Yes	Same as place of supplier No

- Event in Italy – The Italian guidelines and tax advice for this event state that all company contacts in either a different EU Country or one outside the EU should be exempt from VAT. The VAT registration status connected to the registrant has no bearing.

  Rule: Since the guidelines specify only company contacts in a country other than Italy, create a rule with two rows:

VAT Registered	Company Contact	Contact Country	VAT Chargeable
n/a	Yes	Other EU country	No
n/a	Yes	Outside the EU	No

  Reminder: When defining events that are held in a country other than the home location of the organization, you must assign an entity code to the event.

Setting up VAT for Events

VAT taxation for an event involves applying VAT to event functions and hotel rooms. After defining VAT tax codes, you can enter the tax codes for individual event functions and hotel rooms.

Note: Because services are consumed in the country in which they are delivered, all customers are considered taxable.

Before you begin

1. Enable the VAT method.
2. Define the VAT codes.
3. Verify the Default country for the website (System Setup > Set up web components > General configuration).

To apply VAT to an event function

1. From Events, select Define an event to open the Define an event window.

2. Double-click the event that uses VAT to open it in the Define an event window.
3. Double-click an event function to open the Event Function Detail window.
4. Click Edit.
5. Enable the Taxable option to display the Tax Code field.
6. Enter the VAT code in the Tax Code field (next to the Taxable option), or select the lookup icon to search for a tax code.
7. Click Save.

To apply VAT to a hotel room

If you are licensed for Hotel Room Block Management, you can apply VAT to the cost of a hotel room.

1. From Events, select Define an event to open the Define an event window.
2. Double-click the event that uses VAT to open it in the Define an event window.
3. Click Hotels to open the Hotels window.
4. Select a Hotel Code.
5. Click Rooms to open the Room Types window.
6. Select a room from the list of Room Types.
7. Click Edit.
8. Enable the Taxable option to display the Tax Code field.
9. Enter the VAT code in the Tax Code field, or place your cursor in the Tax Code field and press Tab to select a tax code.
10. Click Save.

Setting up VAT for Orders

VAT taxation for Orders involves applying VAT to product categories, individual products, and freight and handling charges. Unless a customer has a nontaxable status, VAT

freight and handling taxes are calculated on both taxable and nontaxable product purchases. Whether tax applies depends on the location of the customer relative to the organization; if the customer is:

- in the same EU country, VAT applies
- in a different EU country but has no VAT number (private person, some types of organizations), VAT applies
- in a different EU and has a VAT number, VAT does not apply
- outside the EU, VAT does not apply

Caution! Tax settings at the product level override those at the category level. That is, if you enable taxes for a category but not for a product in that category, no taxes are calculated; if you disable taxes for a category but enable them for a product in that category, taxes are calculated.

Best practice: Before applying VAT tax codes to products and product categories, consult with an expert on VAT rules and regulations.

Tip: You can override any applied VAT taxes at order entry.

Before you begin

1. Enable the VAT method.
2. Define the VAT codes.
3. Verify the Default country for the website (System Setup > Set up web components > General configuration).

To apply taxation to a product in AR/Cash

1. From AR/Cash, select Set up tables > Products to open the Set up products window.
2. Select a product code from the list of Current Products.
3. Click Edit.

4. Enable the Taxable option. The Tax Code field displays when the Taxable option is enabled.
5. Enter a VAT Tax Code for the product, or select the find icon to look up a tax code.
6. Click Save.

To apply taxation to a product category

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Select a product category from the list of Current Categories.
3. Click Edit.
4. Enable the Taxable category option. The Tax Code field displays when the Taxable option is enabled.
5. Enter a VAT Tax Code for the product, or select the find icon to look up a tax code.
6. Click Save.

To apply taxation to a single product

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Select a product code from the list of Current Products.
3. Click Edit.
4. Enable the Taxable option. The Tax Code field displays when the Taxable option is enabled.
5. Enter a VAT Tax Code for the product, or select the find icon to look up a tax code.
6. Click Save.

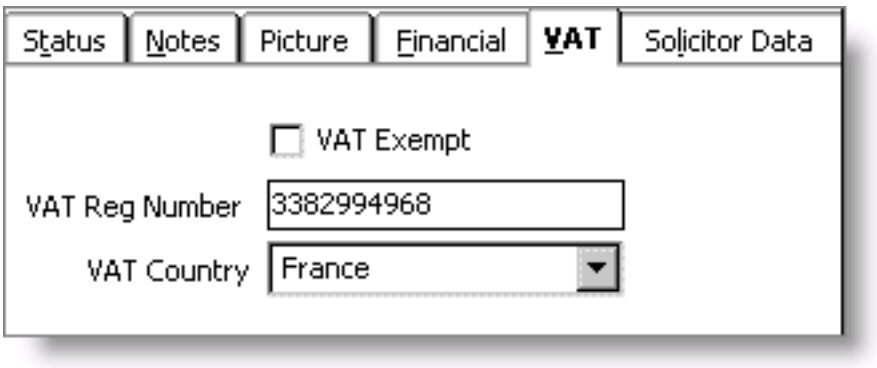
To apply taxation to freight and handling charges

1. From Orders, select Set up module to open the Set up module window.

2. Click Add-On Charges to open the Add-on Charges window.
3. Click Edit.
4. Enable the Apply Sales Tax to Freight Charges and Apply Sales Tax to Handling Charges options. The Freight and Handling Tax field displays.
5. Enter a VAT tax code in the Freight and Handling Tax field, or select the find icon to look up a tax code.
6. Click Save.

Setting VAT tab data for a contact

Before entering an order for a customer, you need to enter the VAT details for the customer on the Manage customers window's VAT tab. This ensures that these details print on invoices.



Manage customers window - VAT tab

- VAT Exempt - Enable if this customer is exempt from VAT in all cases, regardless of VAT Rules.
- VAT Reg Number - Enter the VAT Registration Number for the customer. The VAT Registration Number on the VAT tab corresponds with a customer's VAT exempt status. If a value is entered in the VAT Reg Number field, a customer will be considered exempt and will not be charged VAT.

  The information entered in the VAT Reg Number field displays on the Enter and edit orders window (from AR/Cash, select Process orders > Enter and edit orders).

Note: iMIS only processes VAT Registration Numbers issued by countries within the EU. If you enter a VAT Registration Number for a country outside the EU, VAT processing will be incorrect.

- VAT Country - Select the VAT country from the drop-down list. This information displays on the AR/Cash Enter and edit orders window.

To enter VAT information for an individual

If User Defined Company Flow Down has been set up for VAT, you only need to enter the following information for [1] company records or [2] those with no company affiliation.

1. From Customers, select Manage customers to open the Manage customers window.
2. Click Find to locate the customer's record.
3. Select the VAT tab.
4. (optional) If a customer is exempt from all VAT taxes, enable the VAT Exempt option.
5. (optional) Enter a customer's VAT Registration Number in the VAT Reg Number field. If a value is entered here, a customer is considered exempt.
6. Enter a customer's country code in the VAT Country field.
7. Click Save.

Overriding VAT for a registrant (event attendee)

When entering an event registration, a customer's VAT details will display on the Register a customer window's Overview tab, allowing you to decide whether or not to keep the VAT defaults which you defined at the function level. This is especially useful for international events with registrants from different countries.

1. From Events, select Register a customer to open the Register a customer window.
2. Select the Overview tab.
3. Click New.
4. Enter an Event code (select the lookup icon to look up an event code).

5. Enter the registrant's ID (select the lookup icon to look up an ID). The registrant's name and address information will display on the Register a customer window's data area.

   If the registrant has no record, click Add to go to the Attendee tab:

- Enter the registrant's First and Last name.
- (optional) To add the registrant to your iMIS database, enable the Add to Master option, which creates an ID.
- Complete the registrant's information, including company, address, and phone.
- Select the Overview tab.

6. Enter the Date. The date defaults to the batch date if Batch Control is used; otherwise, the date defaults to the system date.
7. If needed, override the Class code.
8. Enter the Bill To ID if it is different from the registrant's ID (select the find icon to look up an ID).
9. If needed, override the VAT code on the event functions the registrant selected:

- Double-click an event function.
- Enter the number of registrants in the Qty field.
- Enter the VAT code in the Tax Code field (select the lookup icon to look up a tax code). The tax calculated for the function displays in the VAT field.

10. Click Save.

Overriding VAT on an order

When entering an order, a customer's VAT details will display on the Overview tab of the Enter and edit orders window, allowing you to decide whether to keep the VAT defaults which you defined at the product or product category level. This is especially useful for international organizations with customers from different countries. In addition, transaction records are not created for a zero-dollar line item.

When entering orders, VAT is charged to a customer even if the 'Ship to' address's Country field is blank on the Ship to Info tab as long as the following are set on the Organization Names window:

- VAT is enabled for the Default Organization.
- VAT Country is set to a valid European country code.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click New.
3. Enter the Order Type (select the find icon to look up an order type).
4. Enter the Bill to ID (select the find icon to look up an ID). The VAT Summary information displays after entering the Bill to ID.
5. If needed, override the Order Date. The Order Date defaults to the batch date if batch control is used; otherwise, the date defaults to the system date.
6. If applicable, enter a Purchase Order.
7. Enter an order Source code (select the find icon to look up a code).
8. If needed, override the default Shipping Method.
9. If needed, override the default payment Terms.
10. If applicable, enter a percentage discount for the order in the % Discount field.
11. If applicable, enter a backorder Priority for the order.
12. Enter and modify each product:
    - Enter a Product code (select the find icon to open the Product Find window and look up a product), and press Tab. The Description field populates automatically.
    - If you need to override any of the product's defaults, double-click the product line-item to open its Product Detail window:

- Enter/override the VAT Tax Code for the product (select the lookup icon to look up a code).
- Override the default Net or Gross unit prices. As you change either price, the other price and the tax recalculate automatically.
- (Multi-warehouse) If needed, override the product's default Warehouse.
- Enter the product's specific order information in the available user-defined fields.
- Enter the number of products ordered in the Quantity field.
- If applicable, enter a percentage discount for the product in the % Disc field.

  Note: Entering a product-level discount in the % Disc field overrides any order-level discount entered in the % Discount field. However, product-level discounts are applicable for a given product only and do not affect entire order-level discounts.
- Press Tab to add the product to the order. The product will display in the list of Product Line Items, and your cursor will be in the Product field.

13. Click Save to enter the order, and process the order through the stages appropriate for the order type.

Modifying reports and invoices for VAT

To help with VAT reporting, key reports include details about the VAT being collected for the order:

- The new ORDER-Order Status- Order Detail Report VAT (Crystal) report includes the customer's VAT details, such as VAT Exempt status or a VAT registration number and country. The charges at the bottom include explanation of the VAT portion, if any, including the percentage that applies and the net amount being collected.
- The MEETING-Confirmations- Confirmation Letter (Crystal) report shows the amount of VAT tax included in the registration fee.

  iMIS ships with an invoice standard report that includes an analysis of the VAT. In order to use this report, you need to modify the invoices in iMIS.

To modify standard reports for VAT

1. Select Utilities > Report Specs to open the Report Specifications window.
2. Scroll and select the specific report you wish to modify (Omnis only):

- Select MEETING-Invoices-Print Invoices to modify Event Invoices
- Select ORDER-Invoices-Activity Menu Items to modify Order Invoices
- Select a standard Omnis report

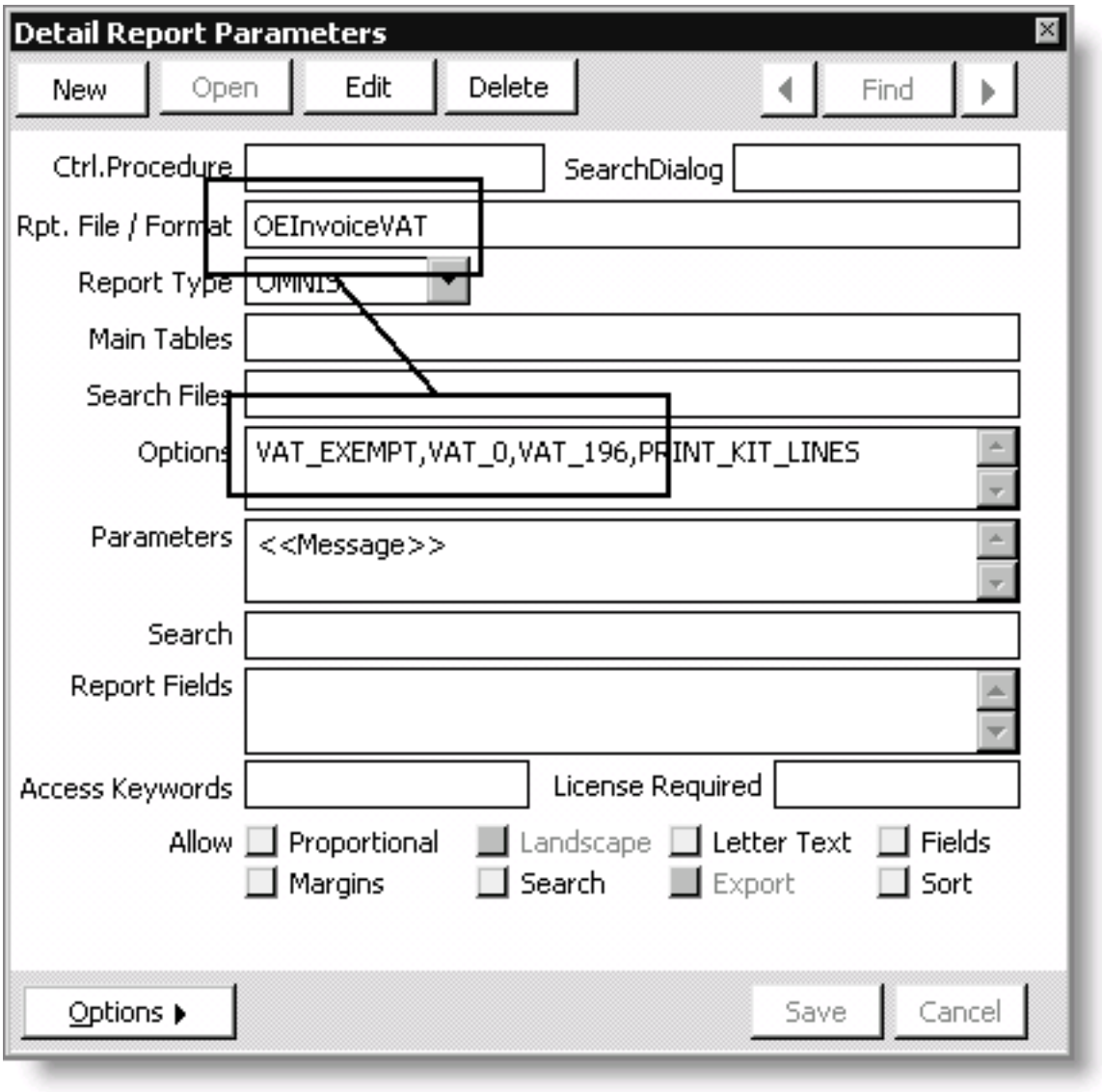
3. Click Clone.
4. Tab to the Title field, and place a period (.) at the beginning of the title.

   Tip: Putting a period at the beginning of the title places the report first in the alphabetical report category, making it the default.

5. Click Parameters to open the Detail Report Parameters window.
6. Change the Rep File / Format to OEInvoiceVAT.
7. For standard reports and Order Invoices:

- Enter the VAT tax codes in the Options field. Precede each tax code by VAT_, such as VAT_EXEMPT, VAT_0, and VAT_196.
- For Event Invoices, do not change the Options.

8. Click Save.



Example of a report modified for VAT

Validating VAT

iMIS does not automatically validate VAT Codes, but there are several validation options you can configure:

To set VAT validation options

You can decide whether to validate VAT codes, and whether to force a user to enter a valid VAT code before proceeding.

1. From Customers, select Set up Module > General.

2. Select Advanced, Edit.
3. Under VAT Validation Options, select one of the following:

- None – Disable the VAT validation options
- Allow User to Override Validation – The user can proceed even with a code the VAT validation process finds invalid
- Enforce Validation – The user cannot proceed with a code that the VAT validation process finds invalid

To hyperlink to VAT validation websites

You can hyperlink to the EU website that provides VAT validation (or any other VAT validation site). The hyperlink you set up will appear on the VAT tab on the Manage Customers window.

1. From Customers, select Set up module > General.
2. Select Advanced, Edit.
3. Under VAT Validation Hyperlink Options, select Show. Default values appear in the Text and URL fields, which you can override.

- If Text is blank but Show is selected, iMIS uses the default text VAT Country Validation.
- If URL is blank, iMIS uses the default value: http://europa.eu.int/comm/taxation_customs/vies/en/vieshome.htm.

4. Select Save, close all windows, and restart iMIS for the changes to take effect.

To validate VAT codes with a stored procedure

To automatically validate VAT codes, you can write a VAT validation stored procedure and attach it. Sample VAT validation stored procedures can be found in the Files\VAT_Validation folder on the iMIS 10.6 installation CD.

1. Go to Customers > Set up tables.

2. Select Country Names.
3. In Current Countries, select the target Country for the stored VAT validation procedure.
4. Select Edit.
5. In VAT Country, enter the desired country code.
6. In VAT Validation Procedure, enter the name of the stored procedure to run against any VAT codes entered into the system.
7. Select Save, close all windows, and restart iMIS for the changes to take effect.

To validate the number of VAT code characters

To automatically validate the number of characters in VAT codes entered (since code lengths vary by country), you can specify VAT code length parameters:

1. Go to Customers > Set up tables.
2. Select Country Names.
3. In Current Countries, select the country for which you want to set parameters.
4. Select Edit.
5. In VAT Country, enter the country code.
6. In the VAT Validation area of the open window, enter a Minimum Size of VAT Number and/or a Maximum Size of VAT Number.
7. To test the limits you specified, enter a value in the Test Value field and select Test.

   Note: If you set up a stored procedure, this will also test the value against that procedure.
8. Select Save, close all windows, and restart iMIS for the changes to take effect.

To display the VAT tab

1. Go to Customers > Manage Customers.
2. Display the Customer Portfolio Tab.
3. Open the Edit Tab Preferences options:

- Right-click the tab label area at the top of the Detail or History pane and select Edit Tab Preferences or
- Click any field and select Ctrl+T.

4. From the Other available Detail Tabs list, select VAT and add it to the Visible Details Tabs list.
5. Select Save, close all windows, and restart iMIS for the changes to take effect.

Issue Management

Issues Overview

Issues allows you to efficiently track multiple issues of various types and their status. The Issues module allows you to create and implement a comprehensive system for managing customer issue functions, enabling you to track multiple issues and their status efficiently. E-mail status updates can be sent upon request to keep customers informed of issue status.

The Issues module can be used successfully by all sizes and types of organizations—from small associations needing to track member-satisfaction issues to large organizations handling customer complaints, product/service feedback, and more complex issues.

You can set up the Issues general lookup/validation tables and configure many of the Issues field labels to match your organization's specific needs, configure the e-mail profile and timer interval to use for sending status updates, and link associated issues.

With the flexibility iMIS is known for, the Issues module integrates with the Customers module to allow current users to seamlessly integrate customer issue management into their systems.

Issues Capabilities

The iMIS Issues module allows you to perform the following tasks:

- Enter new issues
- Update details and status of existing issues
- Track issue status
- Enter and modify issue resolution information
- Maintain issue history
- Maintain issue resolution notes

- Send issue status updates via e-mail
- Generate issue statistics reports

Navigation for Issues

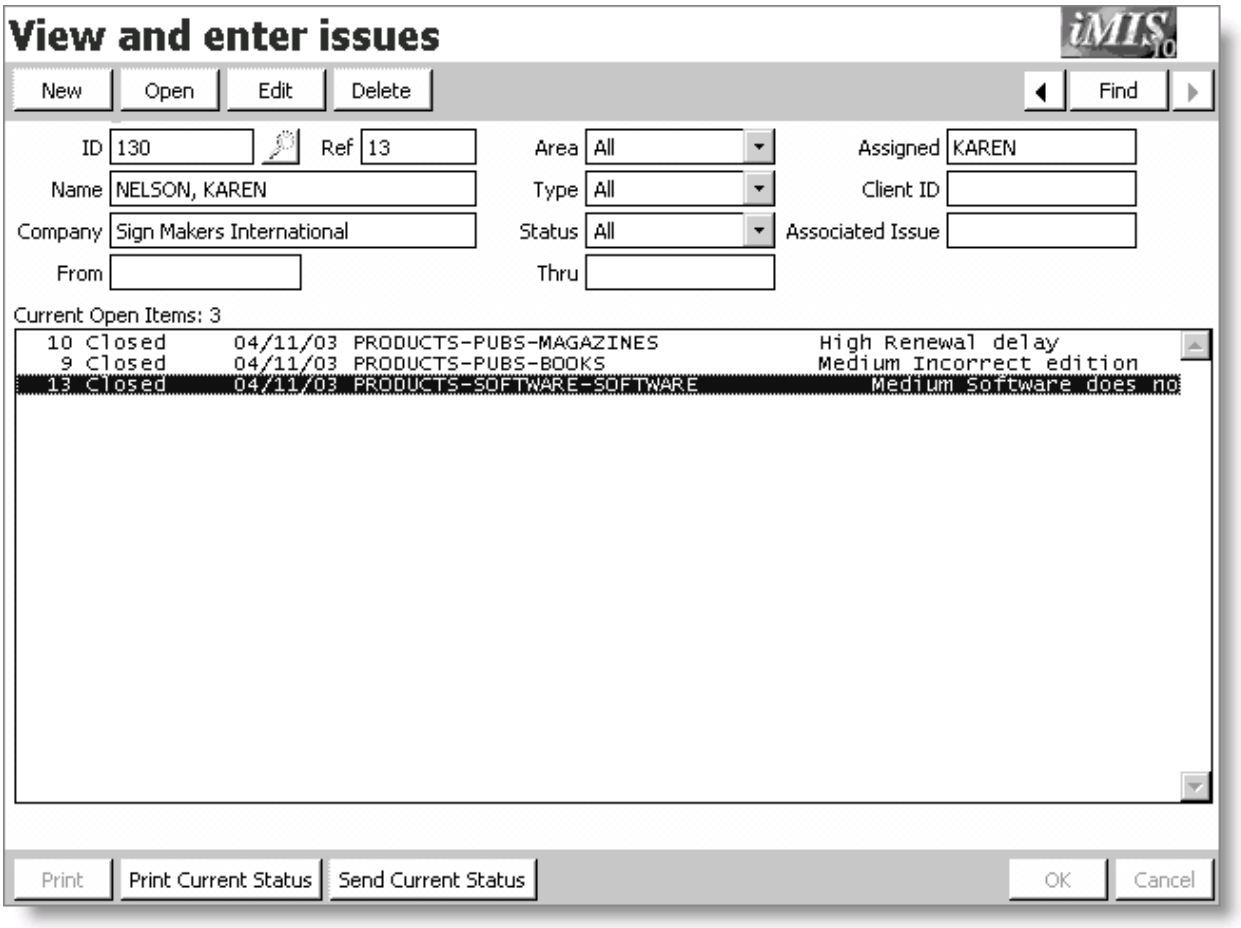
- View and enter issues - Select this item to display the View and enter issues window.
- Generate reports - Select this item to display the Generate reports window.
- Start e-mail server - Select this item to start the Issues e-mail server to send any queued issue status update messages.
- Set up module - Select this item to display the Issues Set up module window.

Entering and Editing Issues in iMIS

Viewing and Deleting Issues

Issues are entered and edited in the View and enter issues, Issue, and Resolution windows. The View and enter issues window displays by default when you select Issues from the Navigation bar.

View and enter issues window



From Issues, select View and enter issues

The View and enter issues window includes the following fields:

Note: The following descriptions reference the configurable prompts on the View and enter issues window (Client ID and Company) by their default names. Your administrator can customize the names of these prompts to suit your organization.

ID

Displays the customer ID of the person who submitted the issue. When searching for issues, you can enter the customer ID or click the lookup icon to look up an ID.

Ref

Displays the issue reference number. When searching for an issue, you can enter the issue reference number.

Area

Displays the area to which the issue is related. You can select the area from the drop-down list when searching for issues. Valid entries for this field are defined by your administrator.

Assigned

Displays the name of the user to whom the issue is assigned. When searching for issues, you can enter the name of the user to whom the issue is assigned.

Name

Displays the name of the person for whom the issue was entered. This field is automatically populated after entering a valid customer ID in the ID field. When searching for issues, you can enter a name.

Type

Displays the issue type. When searching for issues, you can select the issue type from the drop-down list. Valid entries for this field are defined by your administrator.

Client ID

Displays the client ID when an issue is reported on behalf of a third party (the client). When searching for issues, you can enter the client ID.

Company

Displays the name of the company associated with the customer ID. You can enter a company name when searching for issues.

Status

Displays the issue status. When searching for issues, you can select the issue status from the drop-down list.

Associated Issue

Displays the reference number of an issue associated with this issue. When searching for issues, you can enter the associated issue's reference number.

From

Enter the beginning date to use when searching for issues entered on or after a specific date.

Thru

Enter the ending date to use when searching for issues entered before or on a specific date.

Issue list

Displays the issues that met the last issue search criteria.

Print Current Status button

Used to print the current issue status.

Send Current Status button

Used to e-mail the current issue status to any customer(s) specified in an existing ISSUEREQ activity.

To search for issues

You do not have to specify any search criteria in the following procedure. However, if you do not specify a value for at least one of the fields, the search will return all issues.

Note: If you search for all issues and there are a large number of issues in the iMIS database, it may take some time to display all of the issues.

1. From Issues, select View and enter issues.
2. Click Open.
3. (optional) Enter or select the search criteria.
4. Click OK. All issues that meet all of the specified selection criteria display in the issue list on the View and enter issues window and the number of current open issues displays above the issue list.

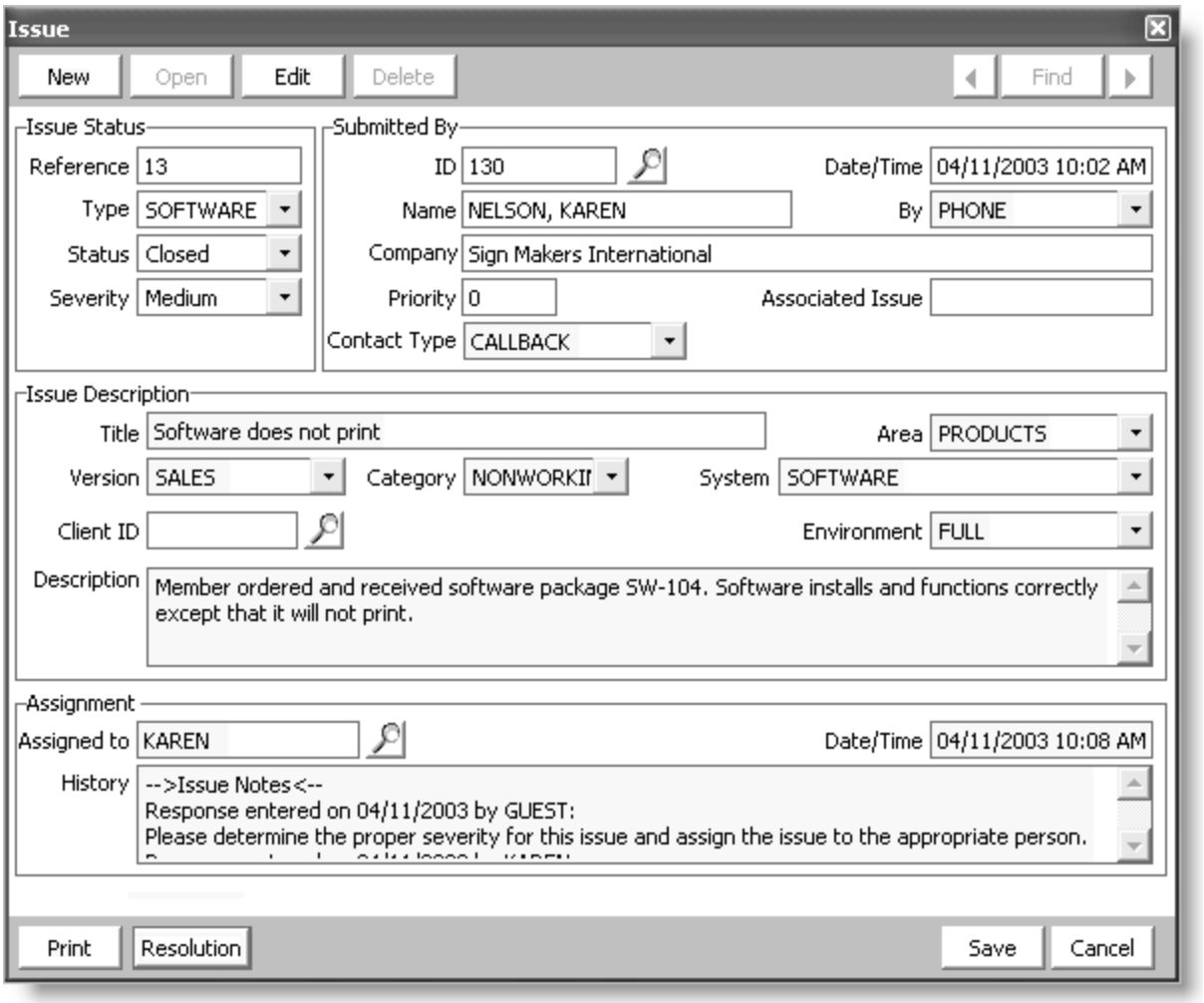
To delete an issue

1. From Issues, select View and enter issues to display the View and enter issues window.
2. Find the issue. See To search for issues for information on searching for issues.
3. Select the issue and click Delete. A confirmation message displays.
4. Click Yes to delete the issue.

Entering and Editing Issues

Issues are entered and edited on the Issue window.

Issue window



From Issues, select View and enter issues, then click New

The Issue window includes the following fields.

Note: The following descriptions reference the configurable prompts on the Issue window (Company, Priority, Version, System, Client ID, and Environment) by their default names. Your administrator can customize the names of these prompts to suit your organization.

Issue Status area

This area includes the following fields:

Reference

(read only) Displays the issue reference number.

Type

(required) Displays the issue type. Valid entries for this field are defined by your administrator.

Status

Displays the issue status. The default status is Unassigned.

Severity

Displays the issue severity. The default issue severity is Unassigned.

Submitted By area

This area includes the following fields:

ID

Displays the ID of the customer who submitted the issue.

Date/Time

(required) Displays the date and time that the issue was entered. This field is automatically populated with the current system date and time when you click New on the View and enter issues or Issue window. You can override the date and time if needed.

Name

Displays the name of the customer who submitted the issue. The Name field is automatically populated with the customer name when the customer ID is entered in the ID field. You can override the name if needed.

By

(required) Displays the method used to submit the issue. Valid entries for this field are defined by your administrator.

Company

Displays the company name. The Company field is automatically populated with the company name associated with the customer ID in the ID field. You can override the company name if needed.

Priority

Displays the issue priority. You can specify a numeric priority between 0 and 255. The default issue priority is 0.

Associated Issue

(optional) Displays the reference of an issue associated with this issue. This can be used to link subsequent issues to the original issue so that you can view all associated issues when the original issue is displayed.

Contact Type

Displays the required method of follow-up contact with the customer who submitted the issue. Valid entries for this field are defined by your administrator.

Issue Description area

This area includes the following fields:

Title

(required) Enter a brief title for the issue.

Area

Select the area related to the issue from the drop-down list. Valid entries for this field are defined by your administrator.

Version

Select the version related to the issue from the drop-down list. Valid entries for this field are defined by your administrator.

Category

Select the issue category from the drop-down list. Valid entries for this field are defined by your administrator.

System

Select the system related to the issue from the drop-down list. Valid entries for this field are defined by your administrator.

Client ID

(optional) Enter the customer ID of a secondary record to be associated with the issue. This must be a record with a type designated as a company record. This is often a company involved in resolving the issue (for example, a service vendor).

Environment

Select the environment related to the issue from the drop-down list. Valid entries for this field are defined by your administrator.

Description

Enter a detailed description of the issue.

Note: You can enlarge the view of the Description field by pressing Ctrl+Z. Click OK to close the enlarged view of the Description field.

Assignment area

This area includes the following fields:

Assigned to

Assign the issue to the appropriate user by entering a valid iMIS user name, or click the lookup icon to look up a user name.

Date/Time

The date and time the issue was assigned. This field is automatically populated with the current system date and time when a valid iMIS user name is entered in the Assigned to field. You can override the date and time if needed.

History

Displays details about the issue history. When a change is made to the Response field on the Resolution window and the issue is saved (by clicking Save on the Issue or Resolution window), the contents of the Response field are appended to the History field. Each time the contents of the Response field are appended to the History field, the contents are prefaced with a line indicating who entered the response and the date the response was entered.

Note: The default text on the first line of the History field is -->Issue Notes<--. This line is reserved for use in a future release and should not be deleted.

When you are in edit mode on the Issue window and click Resolution, any text contained in the Response field on the Resolution window the last time the issue was saved is selected. When you enter new text, the new text replaces the previous text. If you deselect the old text, both the old text and the new text are appended to the History field on the Issue window when the issue is saved. Since this results in duplicated information displaying in the History field, you should normally leave the previous Response text selected so that the previous text is replaced by the new text.

Note: You can enlarge the view of the History field by pressing Ctrl+Z. Click OK to close the enlarged view of the History field.

Resolution button

Used to display the Resolution window for the currently displayed issue.

To enter a new issue

Note: The following procedure references the configurable prompts on the Issue window (Company, Priority, Version, System, Client ID, and Environment) by their default names. Your administrator can customize the names of these prompts to suit your organization.

1. From Issues, select View and enter issues to display the View and enter issues window.

2. Click New to display the Issue window.
3. Select the Issue Status information (Type, Status, and Severity).
4. Enter or select the Submitted By information (ID, Name, Company, Date/Time, By, Priority, and Associated Issue).
5. Enter or select the Issue Description information (Title, Area, Version, Category, System, Client ID, Environment, and Description).
6. Enter or select the Assignment information (Assigned to, Date/Time, and History).
7. Click Save.

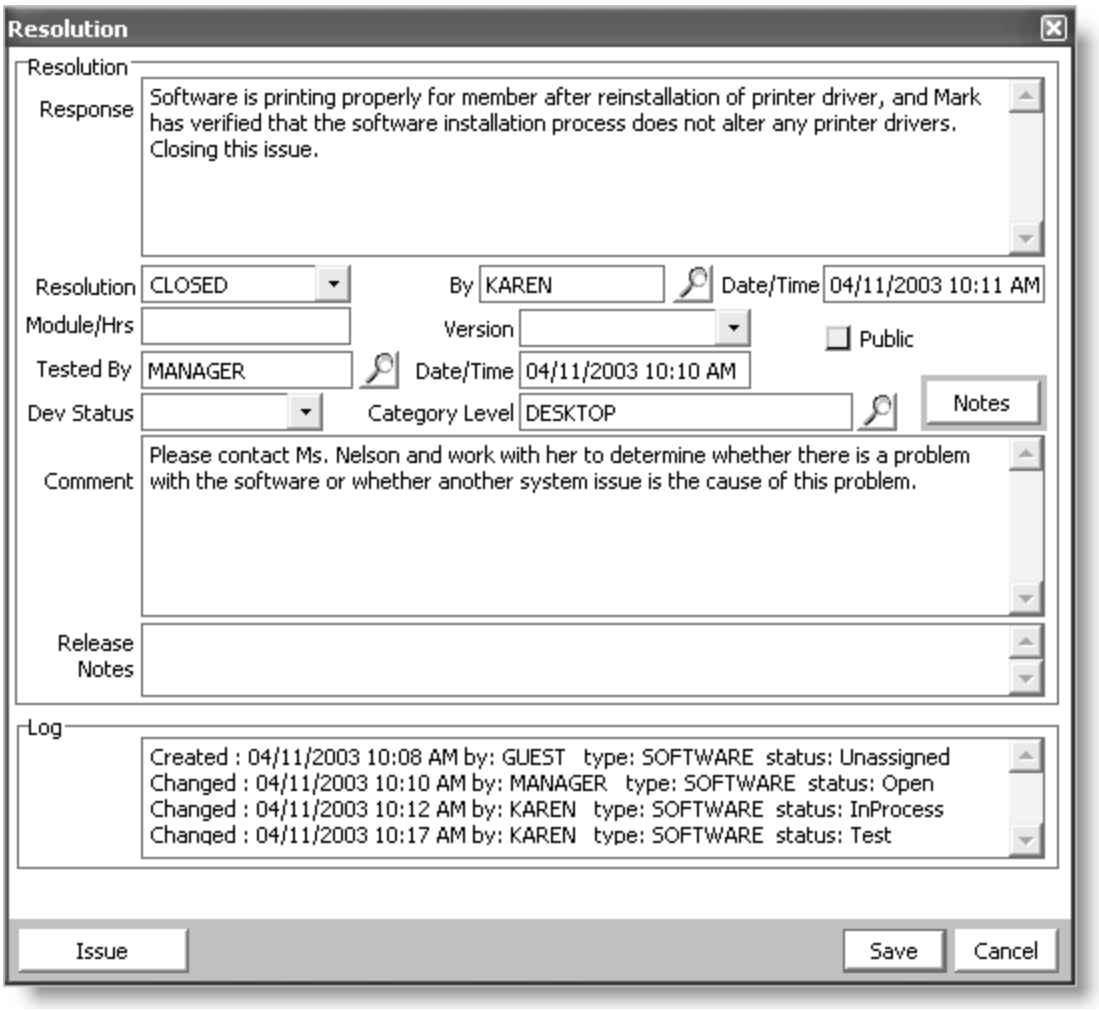
To edit an issue

1. From Issues, select View and enter issues to display the View and enter issues window.
2. Find the issue. See To search for issues for information on searching for issues.
3. Select the issue and click Edit to edit the issue in the Issue window, or double-click the issue to display the Issue window and then click Edit.
4. (optional) Make your changes to the issue on the Issue window.
5. (optional) Click Resolution to display the Resolution window and enter issue resolution and follow-up details.
6. Click Save.

Entering and Editing Issue Resolution Information

Issue resolution information is entered and edited on the Resolution window.

Resolution window



From Issues, select View and enter issues, open an issue, click Edit, and click Resolution.

The Resolution window includes the following fields:

Note: The following descriptions reference the configurable prompts (Module/Hrs, Version, Dev Status, and Release Notes) by their default names.

Resolution area

The resolution area includes the following fields:

Response

Enter the response information. When a change is made to the Response field on the Resolution window and the issue is saved (by clicking Save on the Issue or Resolution

window), the contents of the Response field are appended to the History field. Each time these contents are appended to the History field, the contents are prefaced with a line indicating when the response was entered and by whom.

When you are in edit mode on the Issue window and click Resolution, any text entered in the Response field on the Resolution window the last time the issue was saved is selected. The text that is in this field when you click Save is appended to the History field on the Issue window. To prevent duplicate information from displaying in the History field, you should replace the selected text with your new text.

Note: You can enlarge the view of the Response field by pressing Ctrl+Z. Click OK to close the enlarged view of the Response field.

Resolution

Select the issue resolution from the drop-down list. Valid entries for this field are defined by your administrator.

By

Enter the name of the iMIS user who resolved the issue, or click the lookup icon to select an iMIS user name. iMIS user names are defined on the User window (System Setup > Security administration > Users).

Date/Time

The Date/Time field is automatically populated with the current system date and time when a valid iMIS user name is entered in the By field displayed to the left of the Date/Time field. You can override the date and time if needed.

Module/Hrs

Enter the number of hours required to resolve the issue.

Version

Select the version related to the resolution from the drop-down list. Valid entries for this field are defined by your administrator.

Public

(optional) Marks this issue as searchable by all customers. Clear this checkbox to prevent customers from finding this issue in a search.

Verification area

Tested By

Enter the name of the iMIS user who verified the issue resolution, or click the lookup icon to select a customer ID.

Date/Time

The Date/Time field is automatically populated with the current system date and time when a valid iMIS user name is entered in the By field displayed to the left of the Date/Time field. You can override the date and time if needed.

Dev Status

Select the development status of the issue resolution from the drop-down list. Valid entries for this field are defined by your administrator.

Category Level

(optional) Specifies the category level of the issue resolution. Valid entries for this field are defined by your administrator, and you can select multiple values from a list if you click the Lookup icon.

A category level is a meta category that spans across other categories. For example, you might have categories that align with product types, such as books, t-shirts, and desk accessories, but customers might inquire about the availability of these items in other languages. These inquiries might all be grouped under a category level such as "Language".

Notes

Used to display the Notes window, where you can enter or view any notes related to the issue resolution.

From Issues, select View and enter issues, open an issue, click Edit, click Resolution, and click Notes

Note: You can enlarge the view of the Notes field of the Notes window by pressing Ctrl+Z. Click OK to close the enlarged view of the Notes field.

Comment

Enter any comments related to the verification of the issue resolution.

Note: You can enlarge the view of the Comment field by pressing Ctrl+Z. Click OK to close the enlarged view of the Comment field.

Release Notes

Enter any release notes.

Note: You can enlarge the view of the Release Notes field by pressing Ctrl+Z. Click OK to close the enlarged view of the Release Notes field.

Log

(read only) Each time you create or save an issue, the system automatically enters a record in this field. Each record includes the date, time, the name of the user who saved the issue or resolution, the issue type, and the issue status.

Note: You can enlarge the view of the Log field by pressing Ctrl+Z. Click OK to close the enlarged view of the Log field.

Issue

Used to display the issue in the Issue window.

Note: After displaying the issue in the Issue window, click Resolution on the Issue window to display the Resolution window again.

To enter issue resolution information

1. From Issues, select View and enter issues to display the View and enter issues window.
2. Find the issue. See To search for issues for information on searching for issues.
3. Select the issue and click Edit to edit the issue in the Issue window, or double-click the issue and click Edit on the Issue window.
4. Click Resolution to display the Resolution window.
5. Enter or select the issue resolution information.
6. Click Save.

To edit issue resolution information

1. From Issues, select View and enter issues to display the View and enter issues window.
2. Find the issue. See To search for issues for information on searching for issues.
3. Select the issue and click Edit, or double-click the issue to display the Issue window and click Edit.
4. Click Resolution to display the Resolution window.
5. Make your changes to the issue resolution information.
6. Click Save.

Sending Issue Status Updates

Informing Customers of Issue Status

The Issues module enables your organization to send messages concerning issue status via e-mail to keep your customers informed about the status of important issues.

Note: Your administrator must configure iMIS to send Issues module e-mails.

Sending Issue Status Update Messages via E-mail

You can send Issue status update e-mails to customers about the issues they have submitted.

When you select an issue from the View and enter issues window, the issue status update message is put in the issue update queue.

Note: If there is no Customer Profile e-mail address specified for the submitting customer, a message indicating that an e-mail address could not be found is displayed below the issue list.

When you select Start E-mail server from the navigation task bar in the Issues module, issue status update messages are queued to the e-mail client using the profile specified by your administrator.

Note: If an error message is displayed when trying to send status updates, confirm that your administrator has defined an E-Mail Overlay report.

Note: Your administrator must assign you a Sys mgmt authorization level of two (2) or higher to start the e-mail server.

When the issue status update message is queued to the e-mail client, a log entry indicating this is made automatically.

Note: If the issue status update message was successfully queued to the e-mail client but was not sent, you should check your e-mail client to determine the cause of the problem.

To queue an issue status update e-mail

1. From Issues, select View and enter issues to display the View and enter issues window.
2. Find the issue. See To search for issues for information on searching for issues.
3. Select the issue.
4. Click Send Current Status. A message indicating that the reply request was queued displays below the issue list if the issue was successfully queued. If an error message displays, refer to Troubleshooting E-mail Problems.

To send queued issue status updates

1. From Issues, select Start e-mail server on the Issues task list. The Start E-mail Server window opens.

   If the Timer Interval field on the Issues Set up module window is blank, an error message displays when you select Start e-mail server from the Issues task list.

   After you select Start e-mail server, the timer continues to run as long as the Start E-mail Server window is open. If you close the Start E-mail Server window, the timer stops and no additional issue status e-mail messages will be sent until you select Start e-mail server again.

2. Click Send Now to send queued issue status updates immediately.

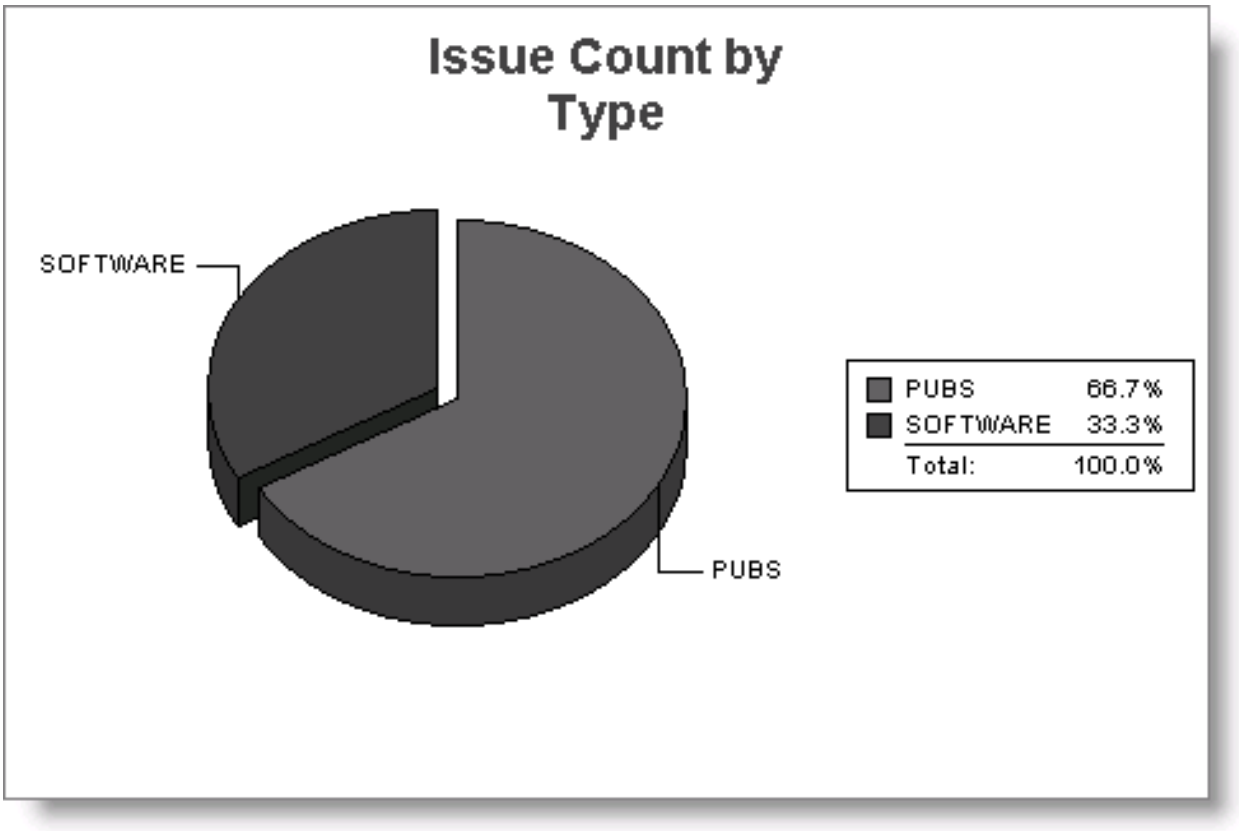
   Note: If you do not click Send Now, any queued issue status update messages will be sent after the time period specified by your administrator.

Generating Issues Reports

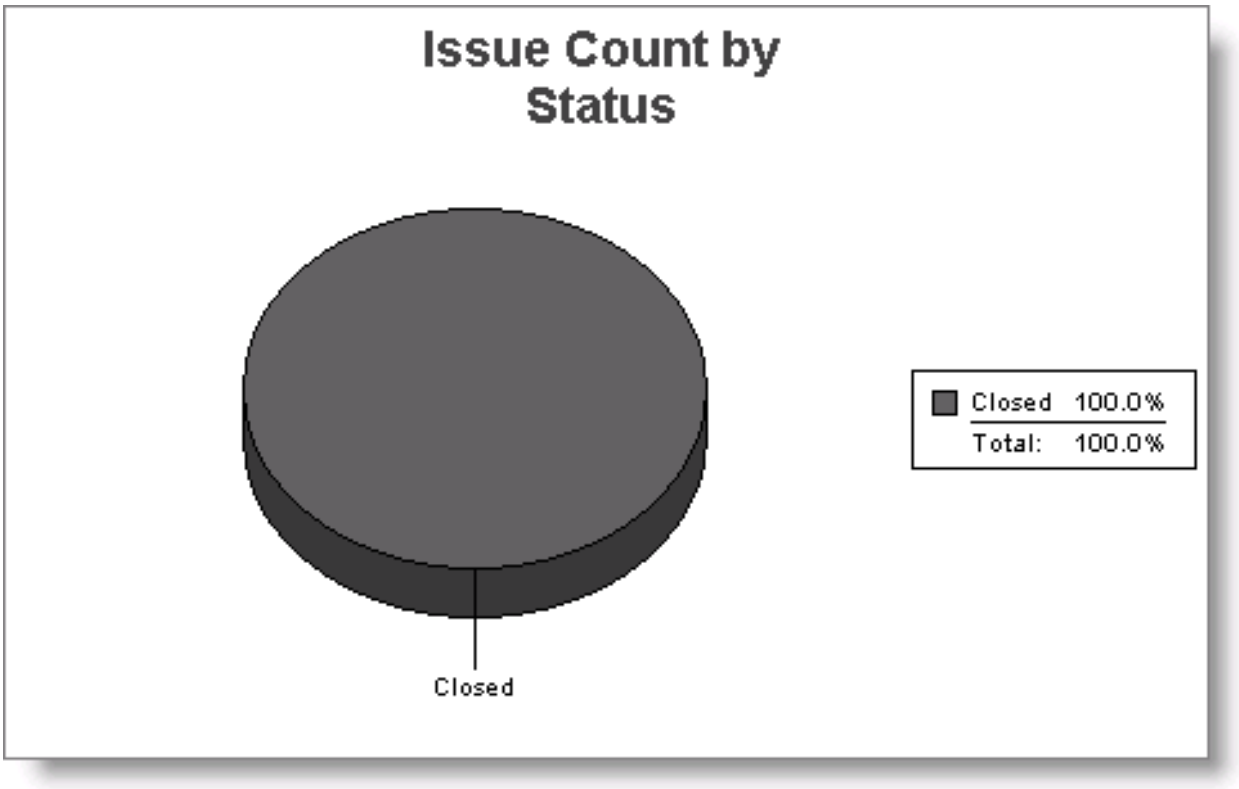
To run the Issue Statistics report

1. From Issues, select Generate reports.
2. From Report Types, select Statistics
3. From Available Reports, select Issue Statistics.
4. Click Run.
5. Specify the Begin Date.
6. Specify the End Date.
7. Click Run.

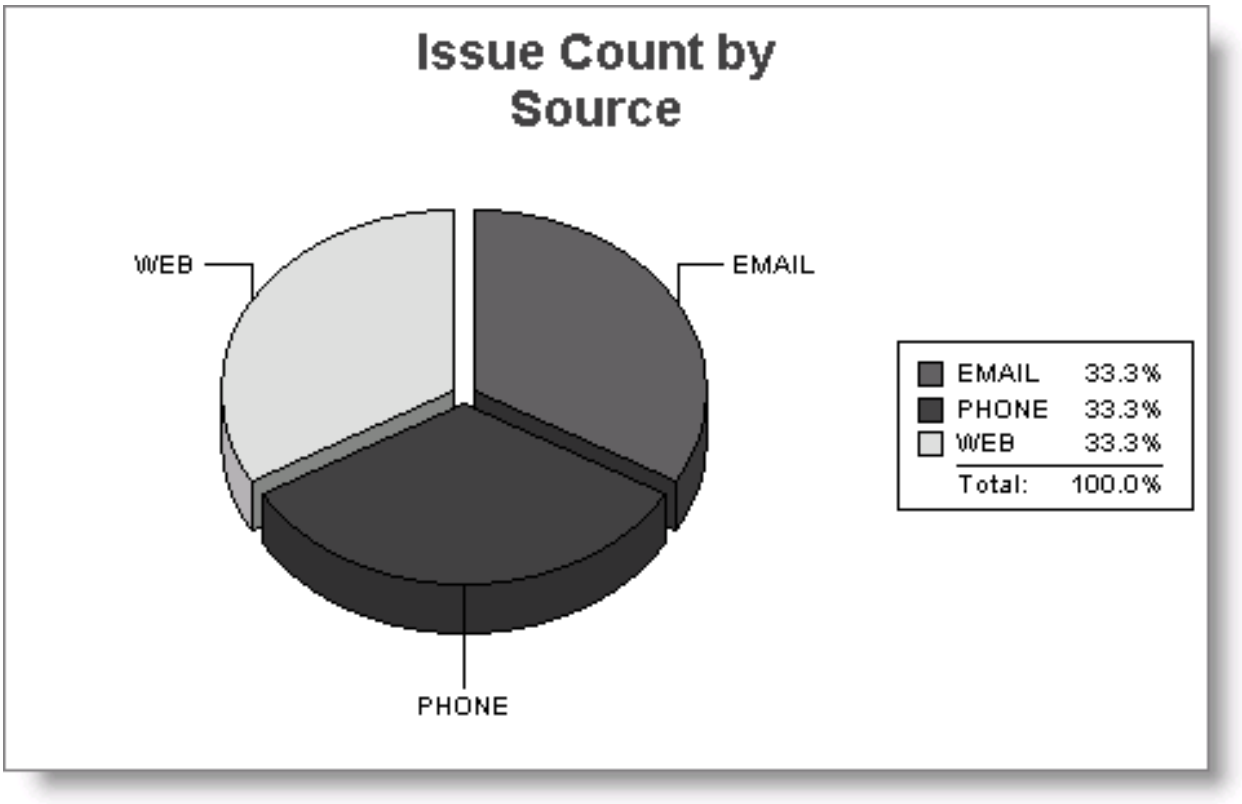
   The Issue Statistics report displays. There are four charts, similar to the following, on the Issue Statistics report.



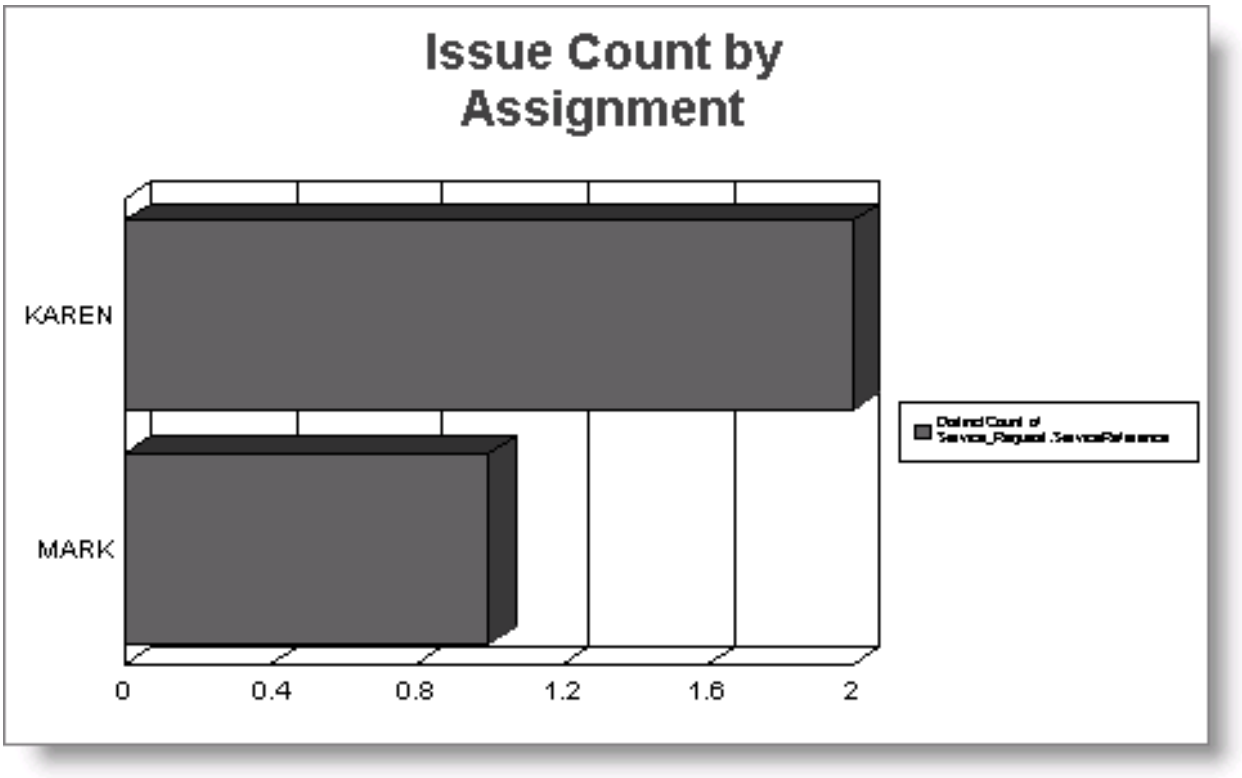
Example of Issue Count by Type chart on Issue Statistics report



Example of Issue Count by Status chart on Issue Statistics report



Example of Issue Count by Source chart on Issue Statistics report



Example of Issue Count by Assignment chart on Issue Statistic report

Setting up the Issues Module

Note: For detailed instructions for creating and using general lookup/validation and expansion tables, see the system reference General Lookup/Validation Tables.

You must create the following general lookup/validation tables and the appropriate codes for each table for the Issues module :

- SR_AREA – The codes used for the Area drop-down list in the Issue window are defined in this table.
- SR_CAT – The codes used for the Category drop-down list in the Issue window are defined in this table.
- SR_CATLEVEL – The codes used for the Category Level drop-down list in the Resolution window are defined in this table.

- SR_CNTTYPE – The codes used for the Contact Type drop-down list in the Issue window are defined in this table.
- SR_DEVSTATUS – The codes used for the Dev Status drop-down list in the Resolution window are defined in this table.
- SR_ENVIRON – The codes used for the Environment drop-down list in the Issue window are defined in this table.
- SR_RECORDEDBY – The codes used for the By drop-down list in the Issue window are defined in this table.
- SR_RES – The codes used for the Resolution drop-down list in the Resolution window are defined in this table.
- SR_SRVTYPE – The codes used for the Type drop-down list in the Issue window are defined in this table.
- SR_SYS – The codes used for the System drop-down list in the Issue window are defined in this table.
- SR_VERSION – The codes used for the Version drop-down lists in the Issue and Resolution windows are defined in this table.

Sample Scenario general lookup/validation tables

SR_AREA general lookup/validation table

Some organizations classify issues as product-related, services-related, or other. In this scenario, the SR_AREA general lookup/validation table contains the following issue relation codes.

Note: The code is listed first, followed by the description in parentheses.

- OTHER (Other)
- PRODUCTS (Products)
- SERVICES (Services)

SR_CAT general lookup/validation table

Some organizations classify issues according to category. In this scenario, the SR_CAT general lookup/validation table contains the following category codes.

Note: The code is listed first, followed by the description in parentheses.

- BILLING (Billing)
- INCORRECT (Incorrect)
- MISSING (Missing)
- NONCURRENT (Noncurrent)
- NONWORKING (Not working)
- OTHER (Other)

SR_DEVSTATUS general lookup/validation table

Some organizations use issue resolution codes that require manager approval. In this scenario, the SR_DEVSTATUS general lookup/validation table contains the following issue resolution codes.

Note: The code is listed first, followed by the description in parentheses.

- APPROVE (Approved)
- DECLINE (Declined)
- PENDING (Pending approval)

SR_ENVIRON general lookup/validation table

Some organizations classify issues by the member type of the person reporting the issue. In this scenario, the SR_ENVIRON general lookup/validation table contains the following member type codes.

Note: The code is listed first, followed by the description in parentheses.

- ASSOCIATE (Associate)
- FAMILY (Family)

- FULL (Full)
- NONMEMBER (Nonmember)
- SENIOR (Senior)

  SR_RECORDEDBY general lookup/validation table

  Some organizations have several methods by which they are notified of issues. In this scenario, the SR_RECORDEDBY general lookup/validation table contains the following issue notification method codes.

  Note: The code is listed first, followed by the description in parentheses.

- E-MAIL (E-mail)
- FAX (Fax)
- LETTER (Letter)
- OTHER (Other)
- PHONE (Phone)
- WEB (Web)

  SR_RES general lookup/validation table

  Some organizations specify the current resolution status of issues. In this scenario, the SR_RES general lookup/validation table contains the following issue resolution status codes.

  Note: The code is listed first, followed by the description in parentheses.

- CLOSED (Closed)
- CONFIRM (Confirm)
- INPROG (In progress)
- OPEN (Open)

  SR_SRVTYPE general lookup/validation table

Some organizations provide several types of services. In this scenario, the SR_ SRVTYPE general lookup/validation table contains the following service type codes.

Note: The code is listed first, followed by the description in parentheses.

- MEMBERSHIP (Membership)
- PUBS (Publications)
- SOFTWARE (Software)
- TOURS (Tours)
- VIDEOS (Videos)

SR_SYS general lookup/validation table

Some organizations manage issues by their relation to products and services. In this scenario, the SR_SYS general lookup/validation table contains the following product and service codes.

Note: The code is listed first, followed by the description in parentheses.

- BOOKS (Books)
- CARDS (Cards)
- DVD (DVD video)
- MAGAZINES (Magazines)
- MEMBERSHIP (Membership)
- OTHER (Other)
- SERVICES (Services)
- SOFTWARE (Software)
- TOURS (Tours)
- VHS (VHS video)

SR_VERSION general lookup/validation table

Some organizations resolve issues within specific departments. In this scenario, the SR_ VERSION general lookup/validation table contains the following department codes.

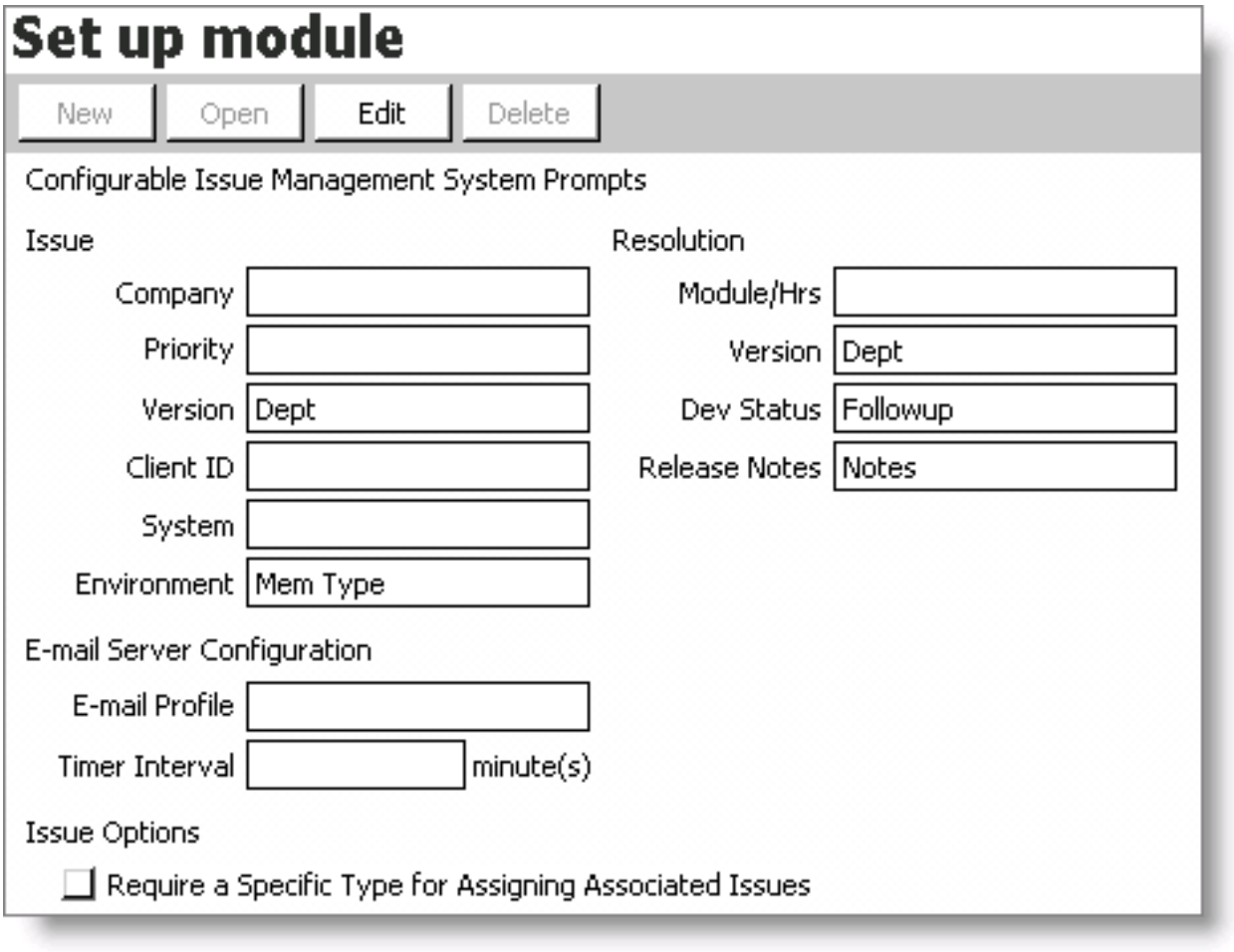
Note: The code is listed first, followed by the description in parentheses.

- MEMBERSHIP (Membership)
- SALES (Sales)
- TOURS (Tours)
- VOLUNTEER (Volunteer Services)

Configuring Options for Issues

You can configure several of the prompts on the View and enter issues, Issue, and Resolution windows to suit your organization's specific needs. You can also specify the e-mail profile and the time interval to use for sending issue status e-mail messages. You can configure these settings on the Issues Set up module window. You must have a Sys mgmt authorization level of two (2) or higher to configure the Issues module on the Issues Set up module window.

Set up module window



From Issues, select Set up module

Issue area

You can use the fields in this area to configure the following prompts on the Issue window:

Company

Enter the prompt name for the Company field. If you do not specify a prompt, the default prompt is Company.

Note: If you configure the prompt for the Company field on the Issue window, the same prompt is also used for the Company field on the View and enter issues window.

Priority

Enter the prompt name for the Priority field. If you do not specify a prompt, the default prompt is Priority.

Version

– Enter the prompt name for the Version field. If you do not specify a prompt, the default prompt is Version.

Client ID

Enter the prompt name for the Client ID field. If you do not specify a prompt, the default prompt is Client ID.

Note: If you configure the prompt for the Client ID field on the Issue window, the same prompt is also used for the Client ID field on the View and enter issues window.

System

Enter the prompt name for the System field. If you do not specify a prompt, the default prompt is System.

Environment

Enter the prompt name for the Environment field. If you do not specify a prompt, the default prompt is Environment.

Resolution area

You can use the fields in this area to configure the following prompts on the Resolution window:

Module/Hrs

Enter the prompt name for the Modules/Hrs field. If you do not specify a prompt, the default prompt is Module/Hrs.

Version

Enter the prompt name for the Version field. If you do not specify a prompt, the default prompt is Version.

Dev Status

Enter the prompt name for the Dev Status field. If you do not specify a prompt, the default prompt is Dev Status.

Release Notes

Enter the prompt name for the Release Notes field. If you do not specify a prompt, the default prompt is Release Notes.

E-mail Server Configuration area

This area includes the following fields:

E-mail Profile

Enter the name of the e-mail profile to use for sending issue status e-mail messages.

Note: The e-mail client must be MAPI-compliant (for example, Microsoft Outlook, Eudora, or Groupwise).

Timer Interval

Enter the time interval (in minutes) at which the system should check for and send any automatic issue status e-mail messages that need to be sent.

Note: You must specify the timer interval (in minutes) for the Issues e-mail server or an error message displays when you select Start e-mail server from the Issues task list.

Issue Options area

Require a Specific Type for Assigning Associated Issues

Select to require that associated issues have a specific type in order to be assigned as associated issues. When this option is enabled, a field displays to the right of this option. Select the required type for assigning associated issues from the drop-down list.

Configuring user prompts

Note: Users must have a Sys mgmt authorization level of 2 or higher to access the Issues Set up module window. The Set up module item does not display on the Issues task navigation list if the current user does not have access. See Limiting user access.

The prompts for the following fields on the Issue window can be configured:

- Company (affects both Issues and View and enter issues windows)
- Priority
- Version
- Client ID (affects both Issues and View and enter issues windows)
- System
- Environment

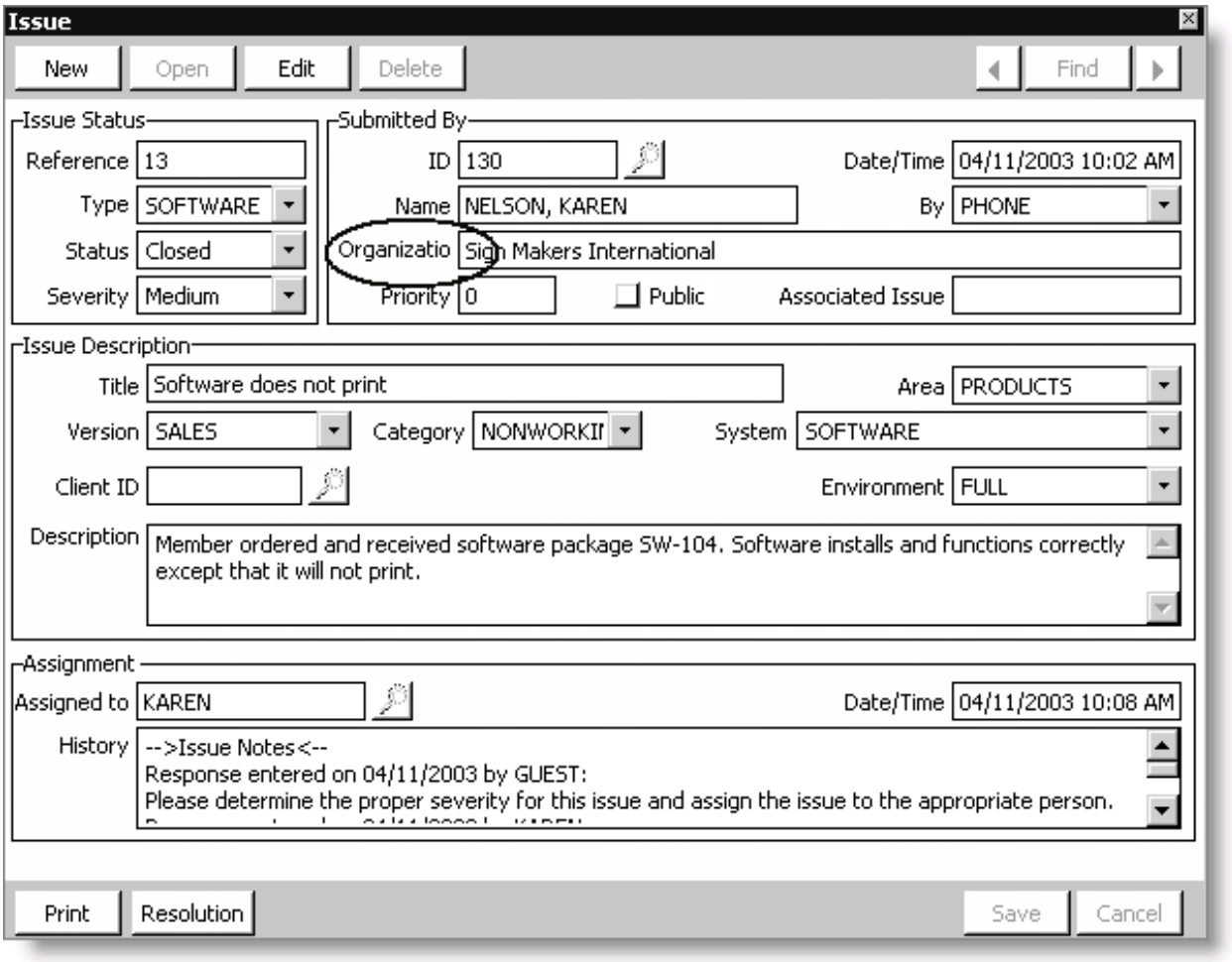
The prompts for the following fields on the Resolution window can be configured:

- Module/Hrs
- Version
- Dev Status
- Release Notes

The field names for configurable field prompts can contain a maximum of 15 characters, including any spaces. Due to display limitations, the number of characters that can be displayed in a field prompt without being truncated by the field itself varies. Uppercase characters and special characters require more display space than lowercase characters, and the amount of space available varies depending on the specific prompt that is being configured. To maximize the number of characters that can be displayed without the prompt characters being truncated by the field itself, use lowercase characters. If all uppercase characters are used for a prompt, the maximum number of characters per line that can be displayed is nine. Depending on the specific field and the actual characters used for the prompt, the maximum number of uppercase characters that can be displayed may be less than nine.

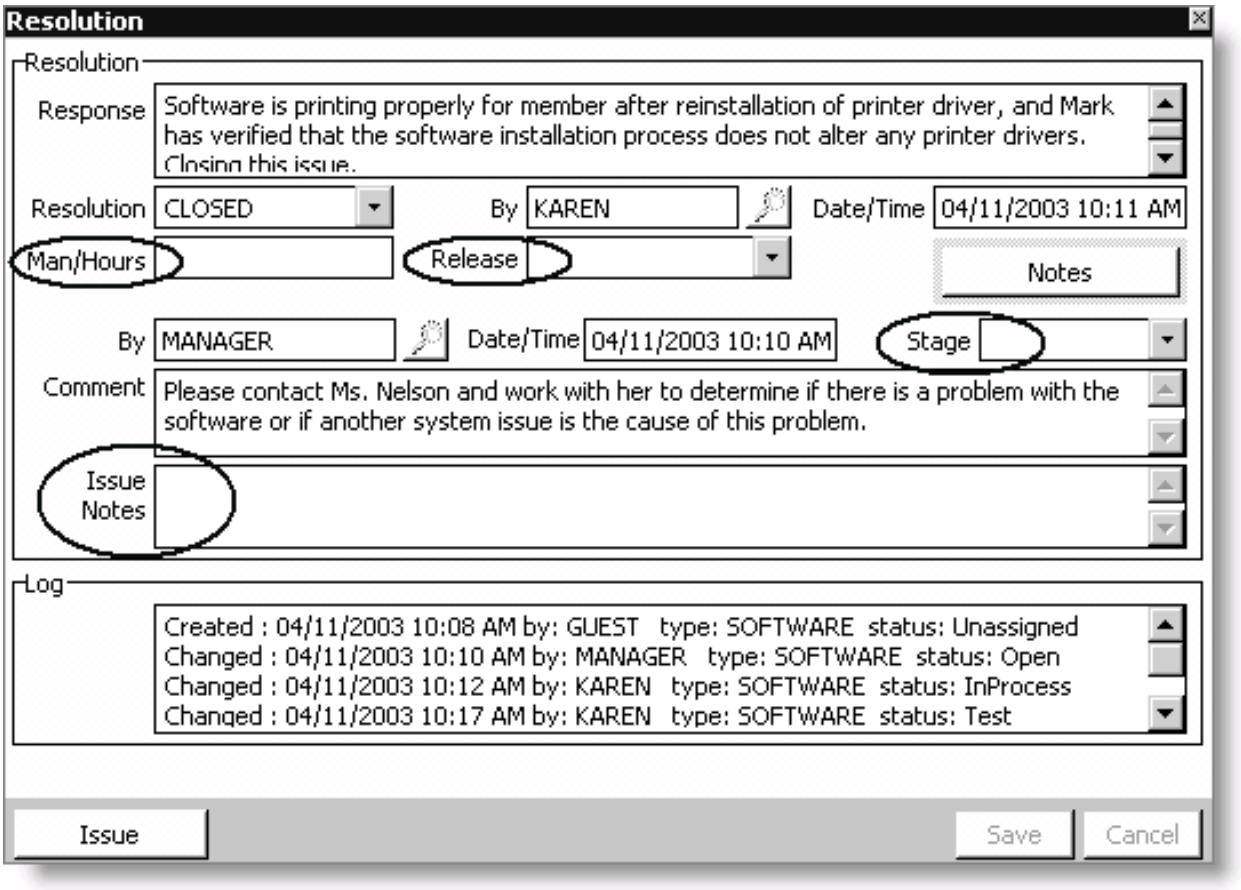
The prompt for the Release Notes field on the Resolution window can be displayed in two lines by including a space in the prompt that is specified in the Release Notes field on the Issues Set up module window. If the prompt includes a space so that the prompt is displayed in two lines, the prompt is displayed centered vertically with the field.

In the following example, the Company prompt on the Issue window has been configured to display Organization, but the modified prompt contains too many characters to display and the prompt is truncated by the field itself.



Example of Issue window with a truncated prompt

The following example illustrates the effective use of configurable prompts in the Resolution window (from Issues, select View and enter issues, open an issue, and then click Resolution).



Example of Resolution window with configured prompts

After configuring any prompts on the Issues Set up module window, be sure to view the prompts on the View and enter issues, Issue, and Resolution windows to be sure that the modified prompts display acceptably.

Configuring Issues e-mail

You can configure how the Issues module sends issue status e-mail messages. You can specify the time intervals at which iMIS checks for and sends issue status e-mail messages to specified customers regarding existing issues.

Selecting Start e-mail server on the Issues navigation task bar starts a timer and displays the Start E-mail Server window. iMIS then periodically checks for and sends (at the specified interval) any unsent issue status e-mail messages that have been queued by the Issues module.

After you select Start e-mail server, the timer continues to run as long as the Start E-mail Server window is open. If you close the Start E-mail Server window, the timer stops and no additional issue status e-mail is sent until you select Start e-mail server again.

If your organization uses a dial-up connection to send e-mail or prefers to send issue status e-mails at specific times of day, you should select Start e-mail server as needed. You can then close the Start E-mail Server window after allowing enough time for all messages to be queued to the e-mail server. The amount of time needed to queue all messages to the e-mail server varies depending on the number of issue status updates that need to be queued.

If your organization needs to send issue status e-mail messages on a continuous basis (for example, for a 24-hour customer support center), leave the Start E-mail Server window open on a dedicated workstation. iMIS and your e-mail client software must be installed on this workstation.

You must create the E-Mail Overlay report specification before you can send issue status updates via e-mail. The text that is included in issue status e-mail messages is contained in this report specification.

In order to start the Issues e-mail server, you must specify the local e-mail profile that the Issues module uses to send issue status e-mail messages and the timer interval at which the Issues module e-mail server checks for any queued issue status update messages. You can specify any existing e-mail profile on the local machine where the e-mail client is running. The e-mail client must be MAPI-compliant (for example, Microsoft Outlook, Eudora, or Groupwise). Local e-mail profiles should be set up using the normal procedure for setting up e-mail profiles for your specific e-mail client. You must specify the timer interval (in minutes) for the Issues e-mail server or an error message displays when you select Start e-mail server from the Issues task list.

Note: Issue status e-mail messages are limited to 2,147,483,647 characters.

An ISSUEREQ activity record is created when an issue status message needs to be sent, either as a result of an automatic status update or when the user clicks Send Current Status on the View and enter issues window. The ISSUEREQ activity records are

checked at the interval specified in the Timer Interval field on the Issues Set up module window. If an issue status message needs to be sent and an e-mail address for the issue status message is found in the e-mail profile specified in the E-mail Profile field on the Issues Set up module window, the issue status e-mail is queued on the e-mail server.

Note: You do not need to manually create the ISSUEREQ activity type in order to send issue status e-mail messages. You may wish to create the ISSUEREQ activity type in order to view unsent issue status update items. For information on manually creating the ISSUEREQ activity type, see Creating the ISSUEREQ activity type.

When you click Send Current Status, a message displays if there is no e-mail address specified in the E-mail field on the Profile tab of the Manage customers window for the ID associated with the issue; the ISSUEREQ activity record is not created.

When the e-mail request is queued by the e-mail client, the ISSUEREQ activity record is deleted and an entry indicating that the e-mail request was queued by the e-mail client is automatically added to the Log field on the Resolution window.

Once the issue status e-mail has been queued by the e-mail client, any errors should be logged by the e-mail system and you should follow the normal troubleshooting procedures for your e-mail system if messages are not being sent.

To configure Issues prompts and e-mail settings

Note: After configuring any Issues prompts, be sure to view the prompts in the View and enter issues, Issue, and Resolution windows to be sure that the modified prompts display acceptably.

1. From Issues, select Set up module to display the Set up module window.
2. Click Edit.
3. Enter any prompts needed for the Issue window in the Issue area.

   Note: If you configure the prompts for the Company or Client ID fields on the Issue window, the same prompts are also used for the Company and Client ID fields on the View and enter issues window.

4. Enter any prompts needed for the Resolution window in the Resolution area.
5. Enter the e-mail profile to use when sending issue status e-mail messages in the E-mail Profile field. You can specify any existing e-mail profile on the local machine where the e-mail client is running.

   Note: The e-mail client must be MAPI-compliant (for example, Microsoft Outlook, Eudora, or Groupwise).
6. Enter the time interval (in minutes) at which the system should check for and send any issue status e-mail messages in the Timer Interval field.

   Note: You must specify the timer interval (in minutes) for the Issue Management e-mail server or an error message displays when you select Start e-mail server from the Issues task list.
7. Select the Require a Specific Type for Assigning Associated Issues option and select a type from the drop-down list (displays when you select the option) to require that associated issues have a specific type in order to be assigned as associated issues.
8. Click Save.

E-Mail Overlay report specification

The subject and message body of issue status update e-mail messages are defined in the E-Mail Overlay report specification. The message body is specified in the Parameters field on the Detail Report Parameters window. The following parameters can be entered in the Parameters field:

- [Service_Request.ServiceReference] - This parameter is replaced by the issue reference in the e-mail message body.
- [Service_Request.Title] – This parameter is replaced by the issue title in the e-mail message body.
- [Service_Request.Status] – This parameter is replaced by the issue status in the e-mail message body.

The issue status update e-mail subject header is prefaced with Re: your Issue followed by the issue reference and issue title.

The following is an example of the contents of the Parameters field on the Detail Report Parameters window:

QLWA Foundation

Issue Management Notification

Your Issue (Ref. # [Service_Request.ServiceReference]) [Service_Request.Title] has been submitted and has been assigned a status of [Service_Request.Status].

Thank you,

QLWA Foundation

This will result in an issue status update e-mail message body similar to the following:

QLWA Foundation

Issue Management Notification

Your Issue (Ref. # 14) Test has been submitted and has been assigned a status of InProcess.

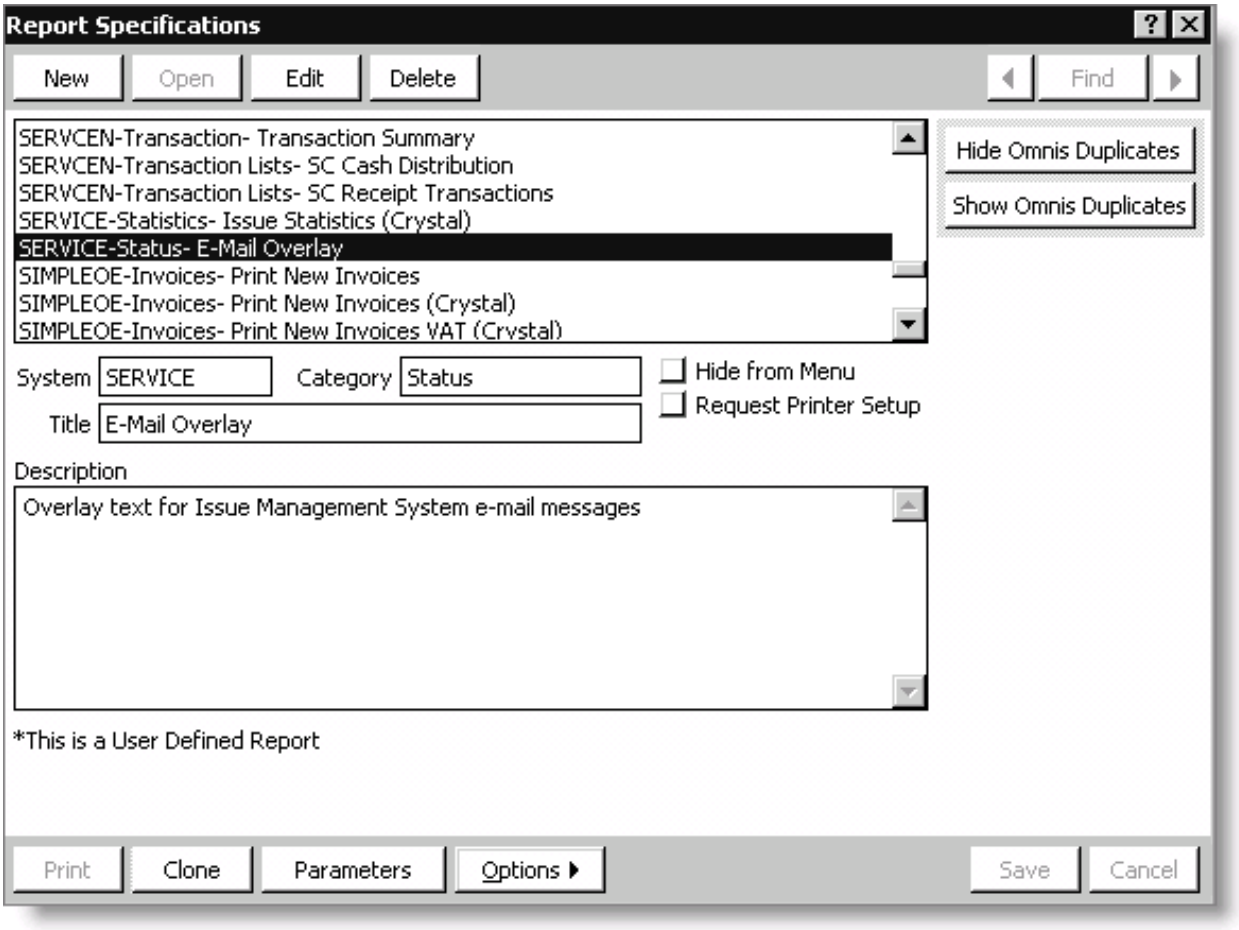
Thank you,

QLWA Foundation

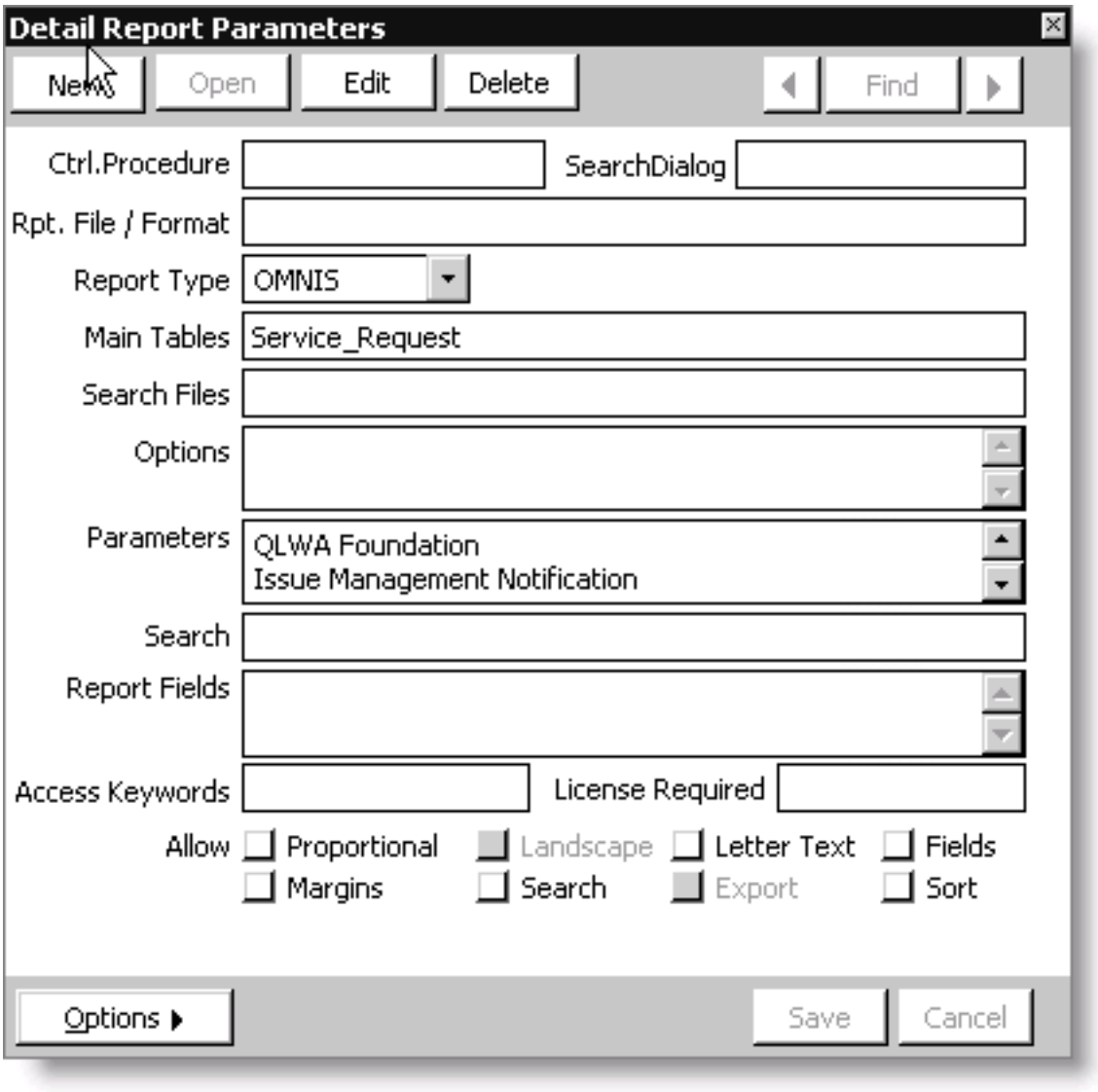
To create the E-Mail Overlay report specification

1. Select Utilities> Report Specs to display the Report Specifications window.
2. Click New.
3. Enter SERVICE in the System field.
4. Enter Status in the Category field.
5. Enter E-Mail Overlay in the Title field.

6. Enter Overlay text for Issue Management System E-mail messages in the Description field.
7. Click Parameters to display the Detail Report Parameters window.
8. Enter Service_Request in the Main Tables field.
9. Enter the text, including the desired issue parameters ([Service_Request.ServiceReference], [Service_Request.Title], and [Service_Request.Status]), to include in issue status update e-mail messages in the Parameters field.
10. Click Save.



Report Specifications window for E-Mail Overlay report specification



Example of Detail Report Parameters window for E-Mail Overlay report specification

Creating the ISSUEREQ activity type

An ISSUEREQ activity record is created when an issue status update message needs to be sent. You do not need to manually create the ISSUEREQ activity type in order to send issue status update messages, but you can manually create the ISSUEREQ activity type so that you can view unsent issue status update messages.

To create the ISSUEREQ activity type

1. From Customers, select Set up module> Activity types to display the Set up activity types window.

2. Click New.
3. Enter ISSUEREQ in the Type field.
4. Enter ISSUEREQ in the Description field.
5. Click Save.

Sample Scenarios

You can configure Issues for your organization's needs, whatever these may be. The sample scenarios provide some examples of how the Issues module might be used in one membership organization.

This organization needs to manage customer issues related to to the following products and services:

- Membership
- Publications (books, magazines, and information reference cards)
- Software
- Videos (DVD and VHS)
- Tours

Configuring Issues for this organization includes configuring several of the prompts that display on the Issue and Resolution windows, and creating the necessary general look-up/validation tables.

Scenario Field Labels

The labels for the following Issues fields are configured specifically for this organization. These labels are configured on the Issues Set up module window.

Issue area

Version

Used to specify the department to which the issue is related, so the label for this field is changed to Dept. This department is normally the department that should resolve the issue.

Environment

Used to specify the member type of the person reporting the issue, so the label for this field is changed to Mem Type.

Resolution area

Version

Used to specify the department which resolved the issue, so the label for this field is changed to Dept. This department is normally the department that should resolve the issue.

Dev Status

Used to specify the current status of the issue, so the label for this field is changed to Followup.

Release Notes

Used to maintain notes on the issue resolution, so the label for this field is changed to Notes.

Scenario Predefined Drop-Down List Values

The issue status choices are predefined and display in the Status drop-down list on the Issue window. The available issue status choices include the following:

- Unassigned – This is the default for all new issues
- Open
- InProcess
- Test
- ReDo

- Hold
- Pending
- Closed

The issue severity choices are predefined and display in the Severity drop-down list on the Issue window (from Issues, select View and enter issues, then click New). The available issue severity choices include the following:

- Unassigned – This is the default for all new issues
- Low
- Medium
- High
- Urgent

Issue Entry without Manager Approval

The following workflow provides an example of entering an issue that does not require manager approval for this organization.

1. A member ordered a book, but received an outdated edition. The member sent an e-mail to the organization, and the following issue was entered and saved in the Issue window.

- Type drop-down list – PUBS
- Status drop-down list – Open
- Severity drop-down list – Medium
- ID field – 105
- By drop-down list – E-MAIL
- Title field – Incorrect edition
- Area drop-down list – PRODUCTS
- Dept drop-down list – SALES

- Category drop-down list – INCORRECT
- System drop-down list – BOOKS
- Mem Type drop-down list – FULL
- Description field – Received previous edition of publication HB-1045.
- Assigned to field – MARK

2. When Mark searches his assigned issues, this issue displays. He opens the issue for editing, determines the actions needed to resolve the issue, and makes the following change on the Issue window.

- Status drop-down list – InProcess

3. Mark makes the following change on the Resolution window and saves the issue.

- Response field – Will ship current edition and arrange for return shipping of previous edition.
- Resolution drop-down list – INPROG
- By field – MARK
- Dept drop-down list – SALES

4. After the current edition has been shipped and return shipping has been arranged for the previous edition, Mark opens the issue for editing, makes the following change on the Resolution window, and saves the issue.

- Response field – Shipped current edition and arranged for return shipping of previous edition. Awaiting confirmation from member of receipt of current edition and return of previous edition.

5. After the member has called to confirm receipt of the current edition of the book and placed the incorrect edition in the mail for return, Mark opens the issue for editing, makes the following change on the Resolution window, and saves the issue.

- Response field – Confirmed member receipt of current edition. Member has return shipped previous edition.

6. After the previous edition has been confirmed as returned, Mark opens the issue for editing and makes the following change on the Issue window.

- Status drop-down list – Closed

7. Mark then makes the following changes on the Resolution window and saves the issue.

- Response field – Return of previous edition has been confirmed.
- Resolution drop-down list – CLOSED
- By field – MARK (to indicate that the issue resolution was confirmed by Mark)

8. All Status changes made on the Issue and Resolution windows display in the Log field on the Resolution window.

Issue Entry with Manager Approval

The following workflow provides an example of entering an issue requiring manager approval for this organization.

1. A member renewed a subscription to one of the organization's magazines, but there was a processing delay and the member missed two issues during this time. The member submitted a complaint via the organization's web site and the following issue was entered and saved in the Issue window.

- Type drop-down list – PUBS
- Status drop-down list – Open
- Severity drop-down list – Medium
- ID field – 107
- By drop-down list – WEB
- Title field – Renewal delay
- Area drop-down list– PRODUCTS

- Dept drop-down list – SALES
- Category drop-down list – MISSING
- System drop-down list – MAGAZINES
- Mem Type drop-down list – FULL
- Description field – Member renewed annual subscription to MAG-003 before the renewal deadline, but did not receive the March and April 2003 issues.
- Assigned to field – KAREN

2. When Karen searches her assigned issues, this issue displays. She opens the issue and determines the actions needed to resolve the issue. She searches for previous issues submitted by this member and finds that this member had previously submitted two issues regarding missing publications. In accordance with organization policy, the member should receive the two missing issues and a free publication, subject to manager approval. She opens the issue and makes the following changes on the Issue window.

- Status drop-down list – InProcess
- Severity drop-down list – High
- Assigned to field – MANAGER

3. Karen makes the following changes on the Resolution window and saves the issue.

- Response field – Ms. Caller previously submitted two issues regarding missing publications and is therefore eligible for a free publication (SB-1031) in accordance with organization policy. Please approve this and return the issue to me with your approval.
- Resolution drop-down list – INPROG
- By field – KAREN
- Dept drop-down list – SALES

4. When the manager searches her assigned issues, this issue displays. The manager confirms that this member did previously submit two issues regarding missing publications,

then makes the following change on the Issue window.

- Assigned to field – KAREN

5. The manager makes the following changes on the Resolution window and saves the issue.

- Comment field – Free publication (SB-1031) approved, approval code 0423B.
- By field – MANAGER
- Followup - APPROVE

6. The next time Karen searches her assigned issues, this issue displays. She opens the issue, makes the following changes on the Resolution window, and saves the issue.

- Response field – Ensured that MAG-003 renewal for this member is in effect. Sent March and April 2003 issues and free publication (SB-1031) to member. Will confirm member receipt of March, April, and May 2003 issues and receipt of SB-1031.
- By field – KAREN

7. Karen later verifies that the member received the missing March and April 2003 issues, the new May 2003 issue, and the free publication. She then opens the issue and makes the following change on the Issue window.

- Status drop-down list – Closed

8. Karen then makes the following changes on the Resolution window and saves the issue.

- Response field – Confirmed that member received March, April, and May 2003 issues and free publication (SB-1031).
- Resolution drop-down list – CLOSED
- By field - KAREN

Issue Entry with Analysis and Testing

The following workflow provides an example of entering an issue requiring some analysis and testing for this organization.

1. A member ordered and received software from the organization. After installing and using the software, the member is unable to print from the software and calls to report this issue. The following issue is entered on the Issue window.

- Type drop-down list – SOFTWARE
- Status drop-down list – Unassigned
- Severity drop-down list – Unassigned
- ID field – 130
- By drop-down list – PHONE
- Title field – Software does not print
- Area drop-down list – PRODUCTS
- Dept drop-down list – SALES
- Category drop-down list – NONWORKING
- System drop-down list – SOFTWARE
- Mem Type drop-down list – FULL
- Description field – Member ordered and received software package SW-104. Software installs and functions correctly except that it will not print.
- Assigned to field – MANAGER

2. The following information is entered on the Resolution window and the issue is saved.

- Response field – Please determine the proper severity for this issue and assign the issue to the appropriate person.
- By field - Bill

3. Since the person entering the issue is not sure of the proper severity or the person to whom the issue should be assigned, the issue is assigned to the manager. The manager can then determine the appropriate severity, assign the issue to the proper person, and

place a note to this effect in the Resolution field on the Resolution window.

4. When the manager searches her assigned issues, this issue displays. The manager determines that the issue should be assigned to Karen with a medium priority. The manager makes the following changes on the Issue window.

- Status drop-down list – Open
- Severity drop-down list – Medium
- Assigned to field – KAREN

5. The manager makes the following changes on the Resolution window and saves the issue.

- Comment field – Please contact Ms. Nelson and work with her to determine if there is a problem with the software or if another system issue is the cause of this problem.
- By field – MANAGER

6. When Karen searches her assigned issues, this issue displays. She makes the following changes on the Issue window.

- Status drop-down list – InProcess

7. Karen makes the following change on the Resolution window and saves the issue.

- Response field – Will contact Ms. Nelson to determine cause of the printing problem.
- Resolution drop-down list – INPROG
- By field – KAREN

8. She contacts Ms. Nelson to discuss the printing problem. She determines that Ms. Nelson's printer driver is not properly installed and assists her in reinstalling the printer driver. Ms. Nelson confirms that the software prints properly after reinstalling the printer driver. Karen makes the following changes on the Issue window.

- Status drop-down list – Test
- Assigned to field – MARK

9. Karen makes the following changes on the Resolution window and saves the issue.
   - Resolution field – Contacted Ms. Nelson and determined that her printer driver was not properly installed. Assisted her with reinstallation of printer driver and Ms. Nelson confirmed that the software is now printing properly. Mark, please confirm that the software installation process does not affect any installed printer drivers and then return this issue to me.
   - Resolution drop-down list – CONFIRM
   - By field - KAREN
10. When Mark searches his assigned issues, this issue displays. He tests the software and verifies that the installation process does not alter any printer drivers. He makes the following change on the Issue window.
   - Assigned to field – KAREN
11. Mark makes the following changes on the Resolution window and saves the issue.
   - Response field – Tested software and verified that the installation process does not alter any printer drivers.
   - By field – MARK
12. When Karen searches her assigned issues, the issue displays. Mark's note that the software installation process does not alter any printer drivers displays in the History field on the Issue window. Karen makes the following changes on the Issue window.
   - Status drop-down list – CLOSED
13. Karen makes the following changes on the Resolution window and saves the issue.
   - Response field – Software is printing properly for member after reinstallation of printer driver, and Mark has verified that the software installation process does not alter any printer drivers. Closing this issue.
   - Resolution drop-down list – NOPROB
   - By field – KAREN

Troubleshooting Issues

Troubleshooting E-mail Problems

- If there is no e-mail address for the ID associated with the issue status update message, a message displays and the ISSUEREQ activity record is not deleted.
- When the Issues module is set to send issue status messages via e-mail, the ISSUEREQ activity records are checked at the interval specified by the Timer Interval field on the Issues Set up module window. An entry is automatically added to the Log field on the issue's Resolution window and the ISSUEREQ activity record is deleted if the issue status e-mail was successfully queued to the e-mail client.

  Note: You must specify the timer interval (in minutes) for the Issues e-mail server or an error message displays when you select Start e-mail server from the Issues task list.
- If the Log field on the issue's Resolution window indicates that the issue status e-mail was successfully queued to the e-mail client, you should check the e-mail profile's Sent folder to see if the issue status e-mail was sent. If the issue status e-mail was not sent, you should check your e-mail client to determine why the e-mail was not sent.

  To troubleshoot e-mail problems

1. Check the Log field on the issue's Resolution window to see if there is an entry indicating that the issue status e-mail was successfully queued to the e-mail client.

- If the issue status e-mail was not successfully queued to the e-mail client, ensure that the proper e-mail profile is specified in the E-mail Profile field on the Issues Set up module window, and ensure that the e-mail client is running on the local machine where iMIS is running.

  Note: After you select Start e-mail server, the timer continues to run as long as the Start E-mail Server window is open. If you close the Start E-mail Server window, the timer stops and no additional issue status e-mail is sent until you select Start e-mail server again.

2. If the issue status e-mail was successfully queued to the e-mail client, check the e-mail client's Sent folder to see if the message was sent.

- If the message was sent, see if a delivery failure message was received. If a delivery failure message was received, attempt to determine the cause of the delivery failure (for example, a bad e-mail address or an unavailable host).

3. If the issue status e-mail was successfully queued to the e-mail client but was not sent, check the e-mail client to determine why the issue status e-mail was not sent.

Legislative Bill Tracking

Legislative Tracking Overview

iMIS Legislative Tracking is an extensive detail-tracking system for all types of legislative bills, including Senate, House, State, and Local. Its capabilities offer powerful support to your legislative affairs staffer, from making it possible to find out which companies are in a legislator's district to analyzing the effect of pending legislation on your industry.

iMIS Legislative Tracking is the first entry in a suite of Government Relations packages. The system facilitates the tracking of important bills and the communication of significant bill information to key contacts. This system is a powerful notetaking tool to allow Legislative Affairs staff to capture, analyze, and report information about important pending legislation affecting your industry or profession.

If you do not have the staff available to research and enter information on pertinent bills in a timely manner, you can connect iMIS to an outside service that provides legislative information through a modem hookup. Your reseller can talk with you about the hardware, software, and services required to effectively utilize such a service.

Legislative Tracking offers the following features:

Key Bill Tracking Information

- Bill Number
- Title Author and Sponsor
- Subject and Category
- Status
- Large, word processing style areas for Synopsis, Analysis, and Notes
- Up to eight additional user defined alphabetic and date tracking fields that can be assigned and used according to your own needs
- A cumulative history of all legislative and related actions

Legislative Reports

- Full profiles of individual bills
- Exports to major word processors for special mailings to key individuals (i.e., committee members, key contacts)

  Optional Automated Inputs (local availability varies)
- Regular downloading of bill descriptive and action history data from certain on-line legislative service companies

  The download procedure would create new bill records, when appropriate, and update action history on existing bills.

Bill Tracking works with Customer

By making full use of Customer Management, you will find many ways to access and make use of the information you collect in Legislative Tracking:

Legislator Tracking

By taking advantage of the rich and flexible demographic capability of the iMIS central database you can maintain detailed information on each legislator. Once the legislators are in Customer Management, you can produce labels, letters, standard reports, and custom reports.

Call Tracking

iMIS makes it easy to keep track of who you have called, what you talked about, and who and when you are to call back. Activities such as letters you have written or information you have sent out are recorded in a history file you can easily review or report on whenever you have need.

Districting your (Company) Members

You can identify the district each of your members is in and record this data in the member's record in the US Congress and St Congress fields on the demographic screen of iMIS. You can load the congressional districts into these fields from outside sources initially and on an on-going basis to avoid data entry and ongoing maintenance. Your reseller can refer you to companies who offer such services.

Once this information is in the member/contact records, you can produce member labels, standard letters, and standard or ad hoc reports by districts through the iMIS Search and Select facilities or the Ad Hoc Report Writer.

Configuring Legislative Bill Tracking

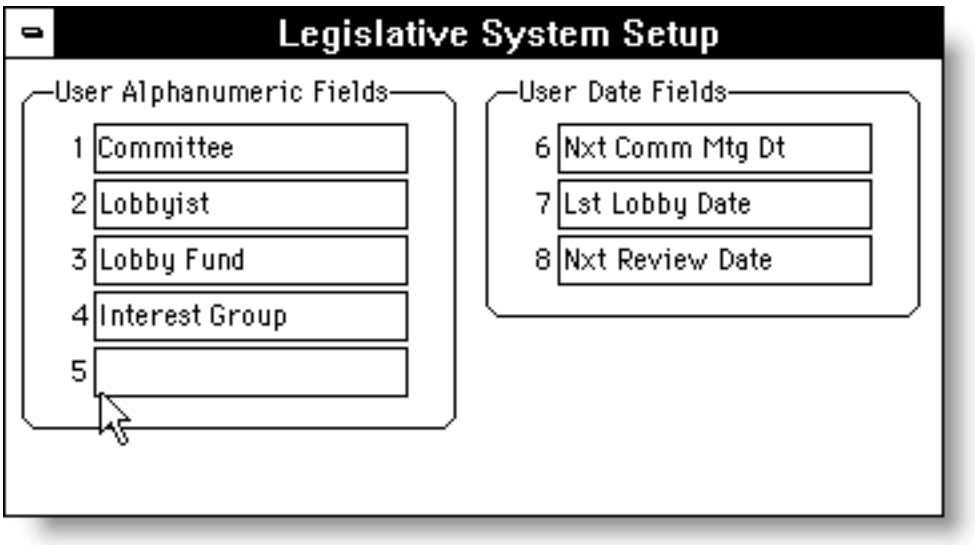
As with all iMIS modules, you need to take steps on the iMIS System Setup level to enable the module and provide secured authorization for each iMIS user.

- If needed, select File > System Menus > System Setup and edit your iMIS Licensing to enable iMIS Legislative Tracking.
- To display the Legislative module in iMIS, select File > Applications > Legislative Tracking. If it does not appear in this list, return to the previous step.
- Provide an Authorization Level for each user of Legislative: select System Setup > Security administration > Users. This security scheme works as it does with all other iMIS modules.

Bill Tracking Options

The only configuration you need to complete before entering your legislative bills is defining custom text and date fields to appear on each bill's Notes window.

- Select Leg/Track> System Setup.



Legislative System Setup window

These optional fields include five alphanumeric and three date fields. Each field is available only if you assign it a label (title) on this window.

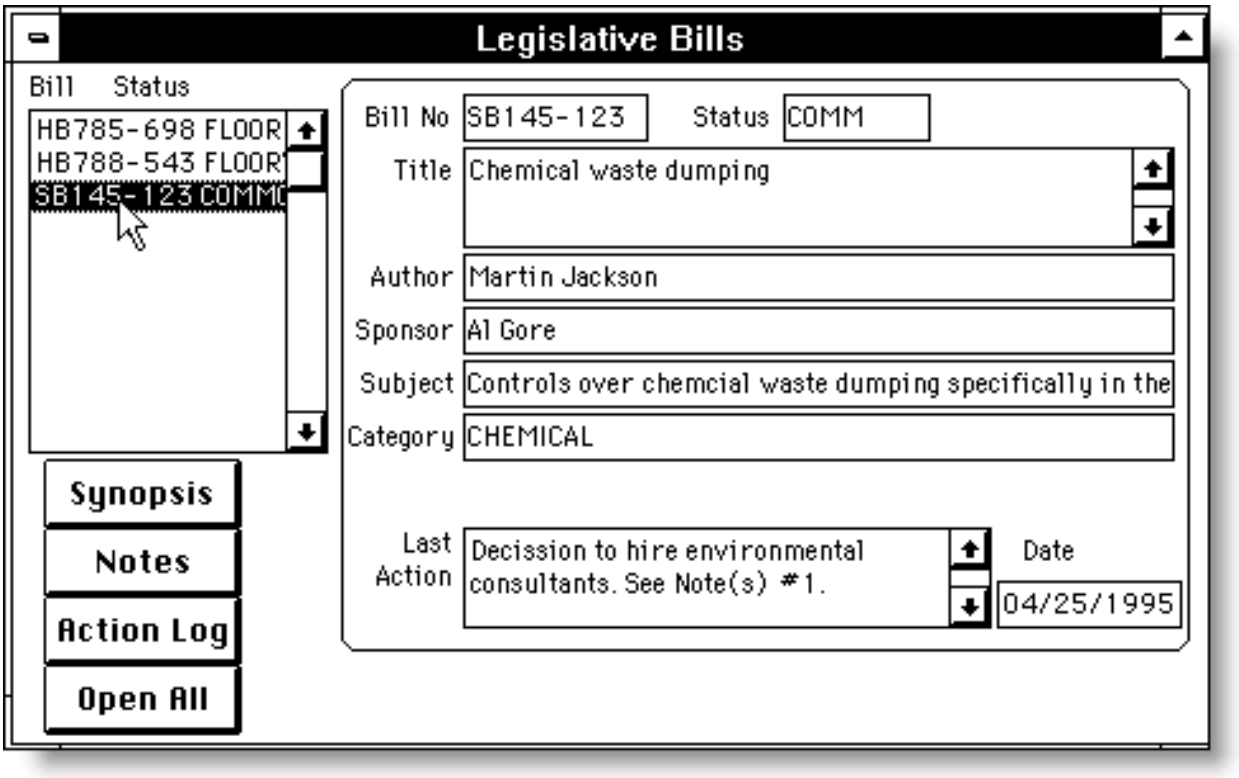
Note: You can place white space between your optional fields to group them visually: do this by skipping fields, such as by using fields 1, 2, 4, and 5 but not 3.

Entering Legislative Bills

Creating Legislative Bill Records

Assume you need to enter Senate bill SB145-123.

1. Select Leg/Track> Bills.
2. Enter the bill Number.
3. Enter the Status of the bill. The status is user-defined; examples would be Open, Closed, or Floor.
4. Enter the bill Title. While iMIS supports an extensive entry area, titles are usually relatively short.
5. Enter the bill's Author or multiple authors, separated by commas.
6. Enter the bill's Sponsor or multiple sponsors, separated by commas.
7. Enter the Subject relating to the bill.
8. Enter the bill's Category. This is user-defined and can be used as selection criteria for reporting purposes.
9. Enter the Last Action occurring with this bill, and accept or override the Date.

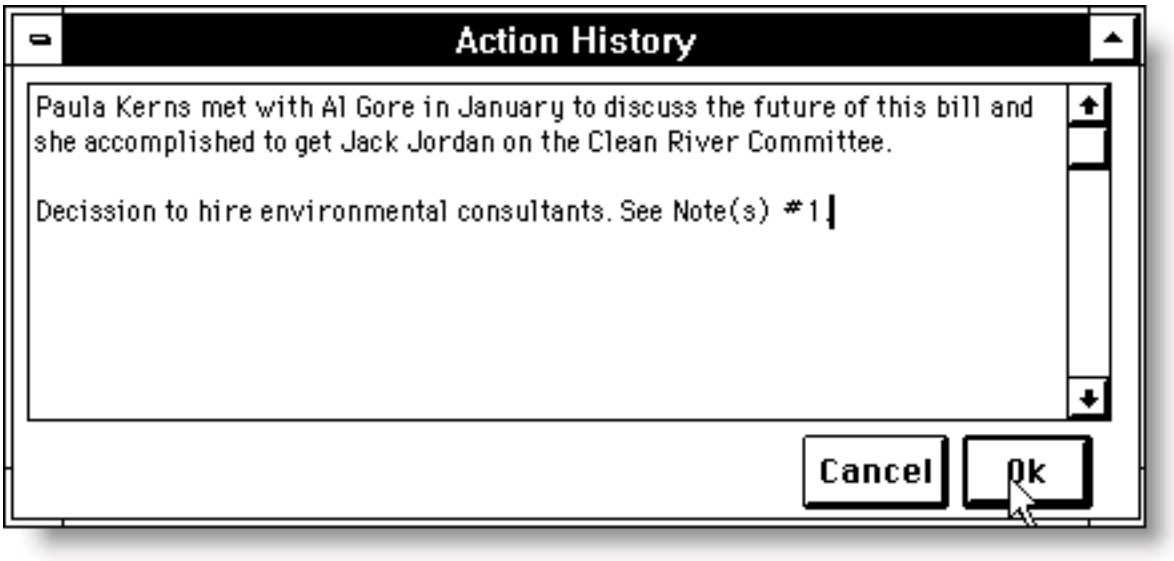


Legislative Bills window

Keeping the Action Log

Until this procedure is automated, you can populate the action log using the text from the Last Action section along with the date can be moved to the action log for history:

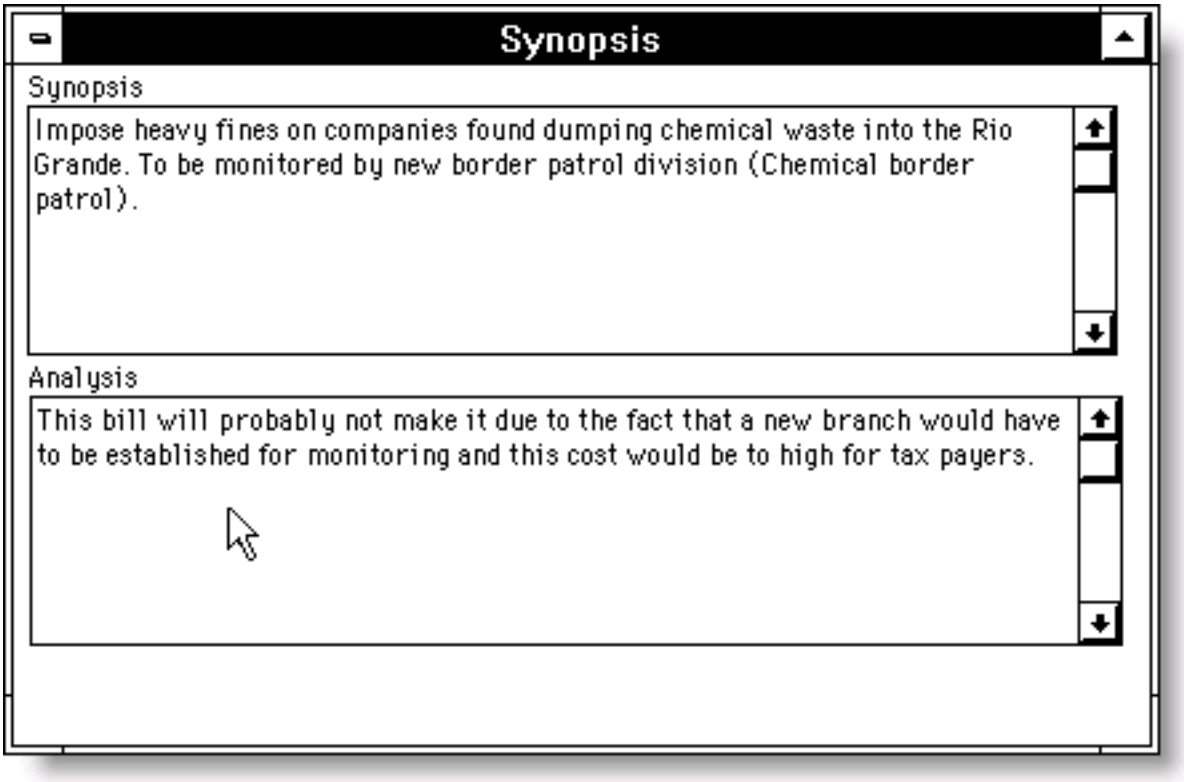
1. Select Edit, and select (highlight) the text to be moved.
2. Select Edit> Cut.
3. Click on the Action Log button, and move the cursor to the location where you want to place the new text.
4. Select Edit> Paste.
5. Press OK to accept.



Action History window

Summarizing the Bill (Synopsis)

- Select the Synopsis button in the top section.



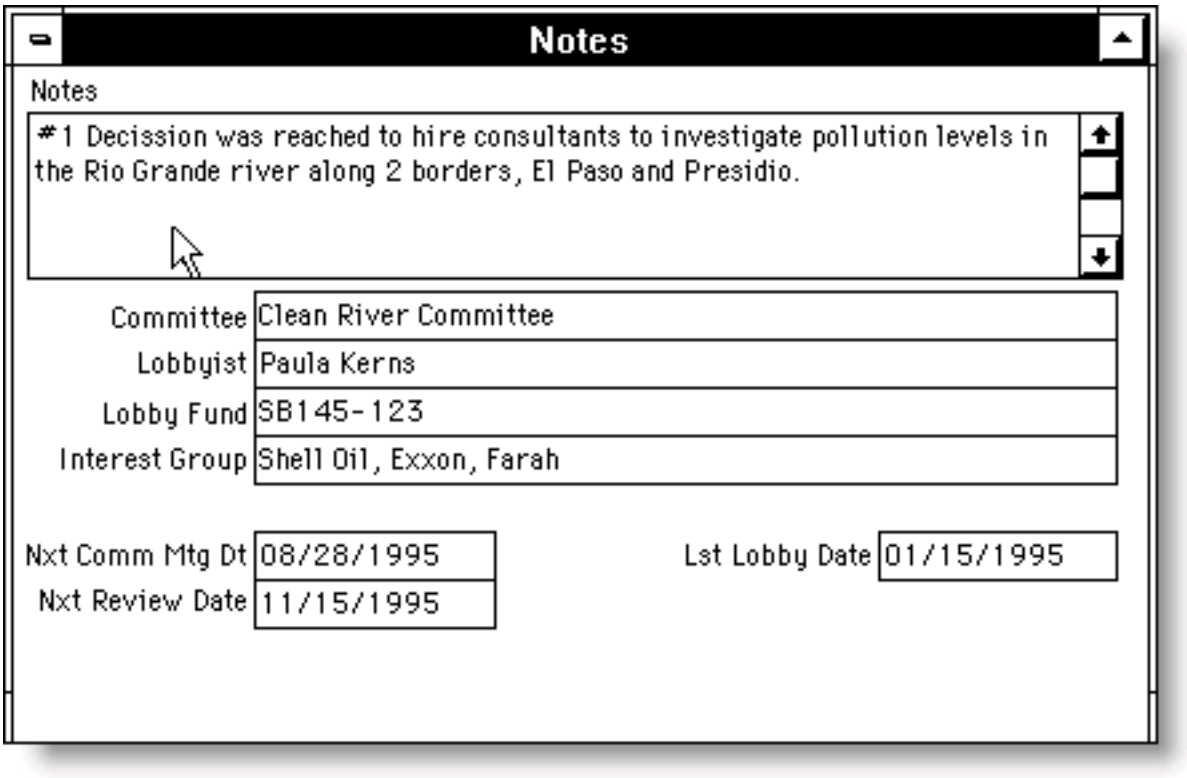
Action History window

A Synopsis of the bill is entered and this section can contain an extensive amount of text. The bottom section, Analysis, is used for your organization's analysis of the bill; again, this section can contain an extensive amount of text.

Tracking Legislative Bills

Entering Notes and Actions

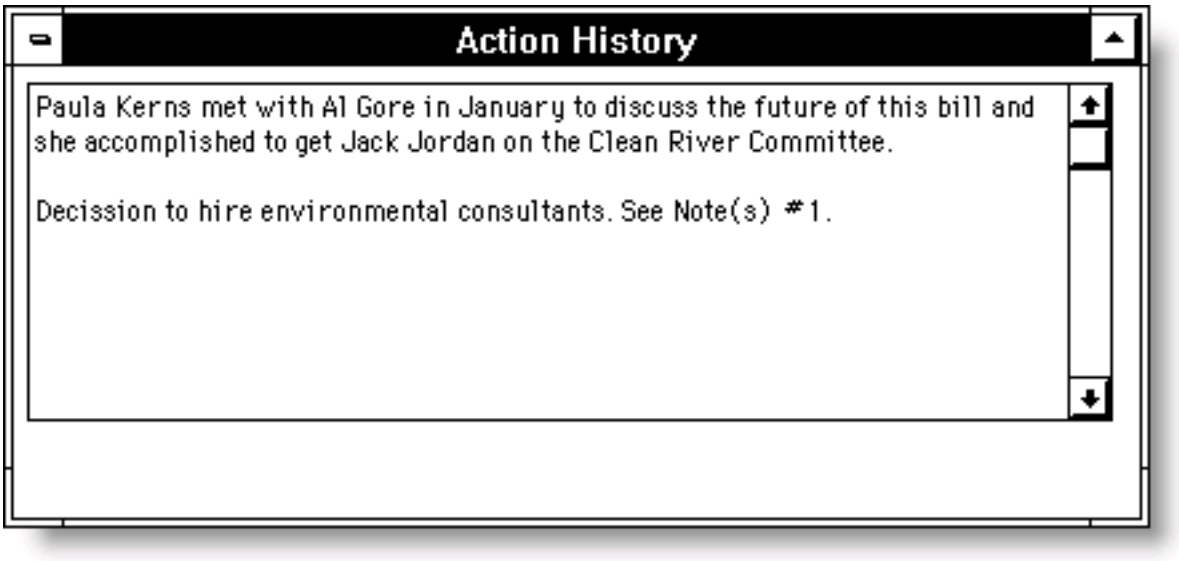
- On the Legislative Bills window, select the Notes button.



This extensive Notes section is available for free format entry and importing. It has cut and paste capability.

The bottom half of this window contains user-defined fields (configured in Legislative System Setup). These optional fields include 5 alphanumeric and 3 date fields.

- Return to the Legislative Bills window; select the Action Log button:



As in the Notes section, this is a free format area for entry, import, or cut and paste operations.

Marketing

Understanding Marketing Suite

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

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

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

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

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

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

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

Campaign Management

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

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

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

Campaign Management hierarchy

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

Campaign Management tiers

Campaign

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

Appeal

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

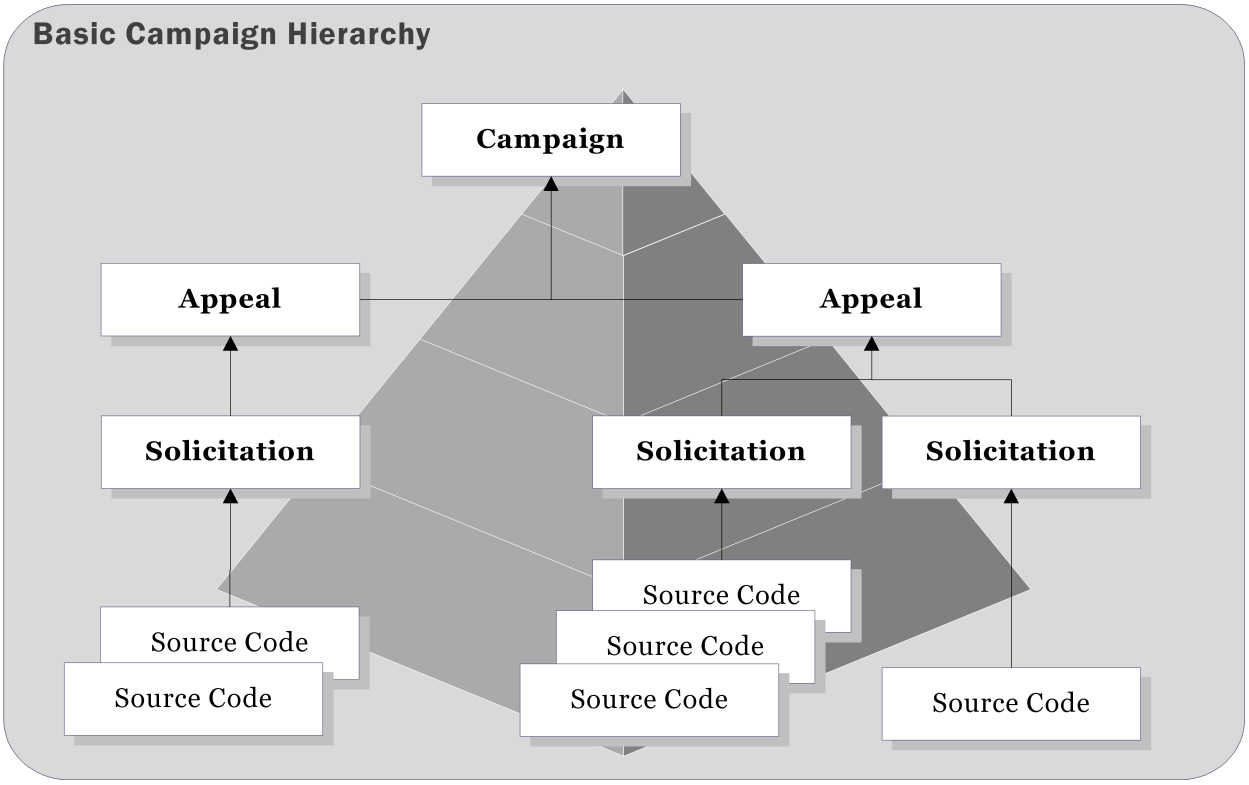
- A phase of the project, such as "First Request" or "Airwaves Blitz"
- A portion of the campaign targeted to a specific group of contacts or prospects
- A portion of the campaign assigned to an internal group (generating mailing lists, designing artwork, managing responses)

Solicitation

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

Source codes

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



Default campaign hierarchy

Basic and complex campaigns

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

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

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

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

Segmentation

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

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

RFM Analytics

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

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

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

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

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

Communications and reporting

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

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

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

Many iMIS communications features help you perform efficiently:

- Use saved report selections from other iMIS functionality for merge lists
- Preview merged messages and edit them before sending
- Combine email merge and fax merge into one mass mailing with timed delivery
- Combine multiple queries into one mailing
- Send merged event confirmations for a single event or for all events
- Export source lists to external vendors, fulfillment providers, or listservs
- Reprint event confirmations as needed

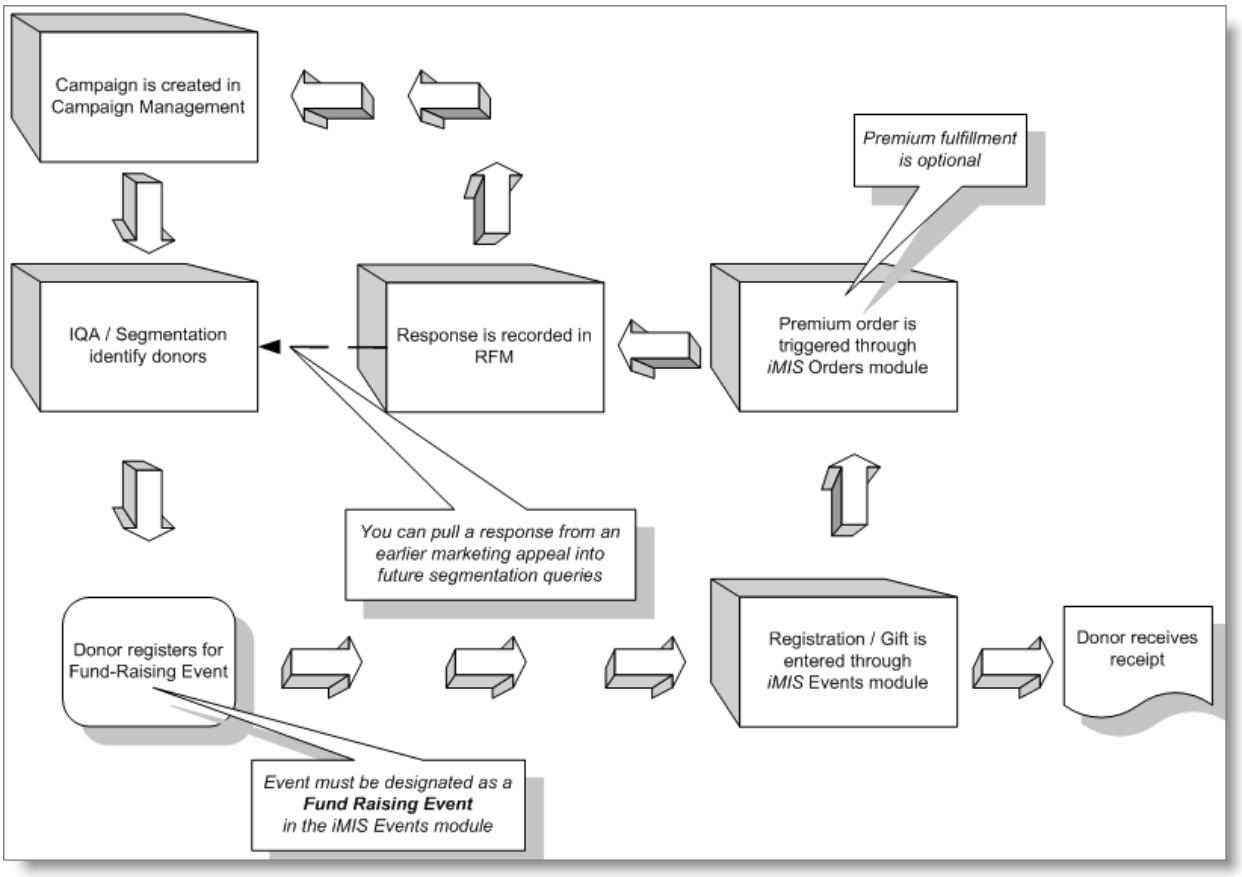
- Send updates to the activity history display
- Collect email bounce-backs
- Ensure that broadcast email messages are not blocked as spam
- Generate projects based on complex business rules or in response to a campaign

Marketing Suite integration across iMIS

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

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

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



Example of Marketing Suite interaction throughout iMIS

Marketing Concepts and Terms

Basic and closed-loop marketing principles

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

- Retail marketing
- Fund raising
- Brand marketing
- Membership
- Issue awareness

- Event marketing
- Calls to action

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

Customer-focused marketing

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

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

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

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

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

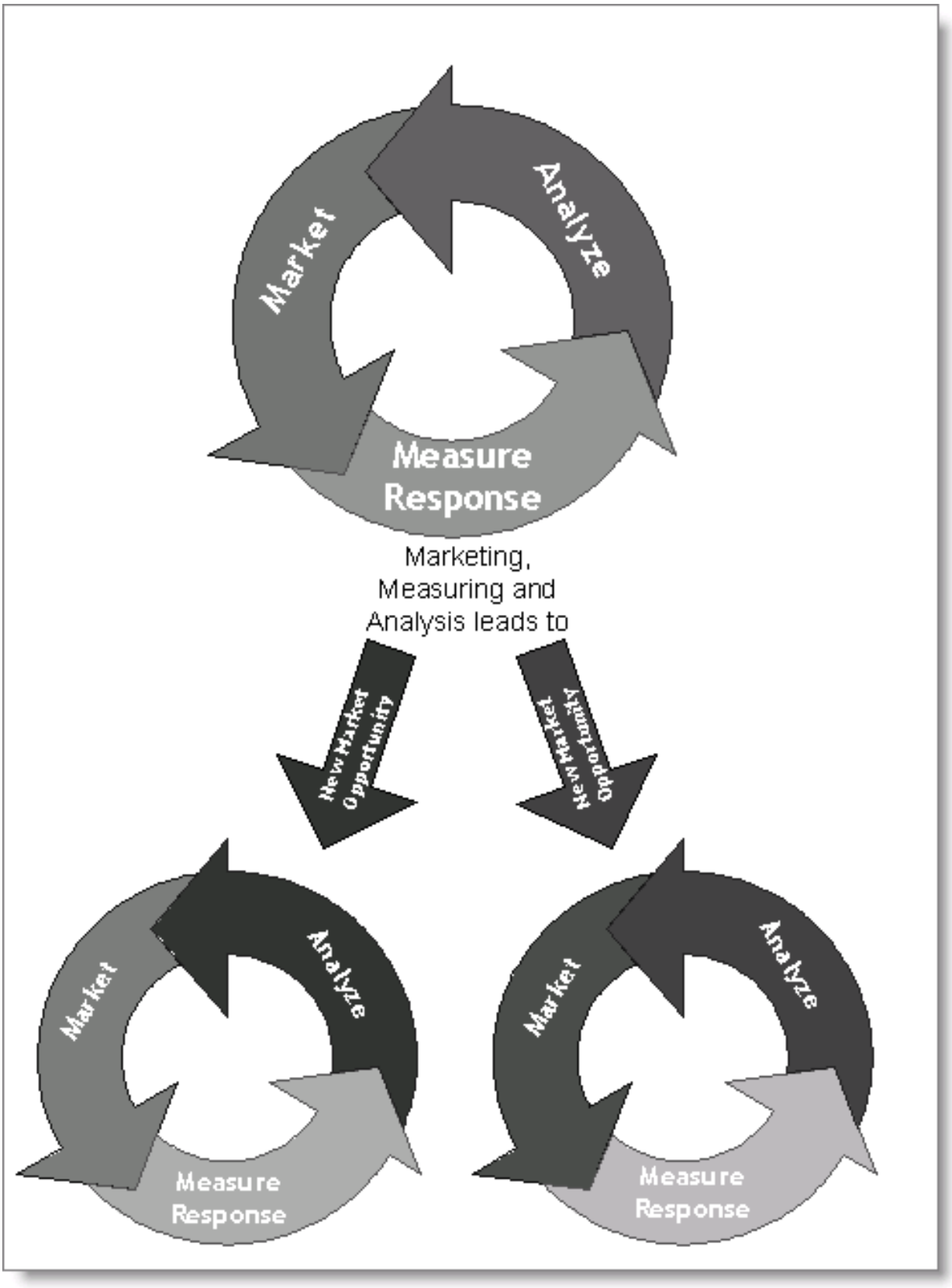
- Encouraging your customer service staff to ask questions when they are on the phone with your customer and to record the answers.

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

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

  Closed-loop marketing

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


Market
Analyze
Measure
Response
Marketing,
Measuring and
Analysis leads to
New Market
Opportunity
New Market
Opportunity
Market
Analyze
Measure
Response
Market
Analyze
Measure
Response

Closed-loop marketing process

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

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

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

Closed-loop marketing refers to the cycle of:

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

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

The role of segmentation

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

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

Segmentation usually begins by defining broad audience groups. However, audiences should not be considered as isolated groups; they may support the organization in a vari-

ety of ways. By recognizing that these relationships exist, an organization can offer personalized targeted marketing.

Types of data

A variety of data can be used for targeted marketing:

- Demographics
- Psychographics
- Transactional data

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

Demographics

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

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

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

Psychographics

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

Psychographic data is usually gathered through polls and surveys.

Transactional Data

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

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

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

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

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

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

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

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

RFM is also ideal because it can be implemented easily and regularly within a database. Ideally, data should be reviewed with a vendor/partner who specializes in understanding

marketing statistics and segmentation, but this is not always necessary. Other more advanced data analytic services are also available, but can be expensive and difficult to implement and are best used to develop a predictive model.

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

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

Using Different Types of Data to Enhance Marketing Efforts

Source Code assignments fall into three basic categories:

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

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

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

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

What feeds source codes into Campaign Management?

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

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

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

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

Testing the marketing plan

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

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

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

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

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

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

Terms to know: Campaign Management

actual cost

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

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

appeal

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

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

average transaction amount

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

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

campaign

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

campaign type

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

- None
- Annual - Campaign that occurs every year
- Designated - Funds generated by the campaign are committed to a specific entity

- Undesignated - Funds generated by the campaign are not committed to a specific entity. The organization decides how to allocate the funds, unless specified by the donor.

cost per thousand

Equal to the following:

- For each campaign, appeal, and solicitation:

(Actual Cost x 1000) / number of pieces mailed

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

(Total Cost x 1000) / number of pieces mailed

count

Total records in an external list

current response rate

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

number of responses received / number of pieces mailed

date of first response

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

date of last response

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

drop date

The definition of drop date depends on the media involved:

- Direct mail – Date delivery begins
- Telemarketing – Date calls begin
- Media spots (TV, radio, webcast) – Air date

- Newsletters – Date of issue mailing
- Online campaigns – Date email messages are sent

Drop dates for other efforts can include:

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

dummy/test selects

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

During the production process, counts are usually required for:

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

estimated cost

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

(total insert costs x estimated number of contacts solicited) + (source code overhead costs)

external filename

Name of an external list

highest transaction amount

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

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

insert

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

insert type

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

- None
- Brochure
- Envelope
- Form
- Postage

kill file

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

last drop date

Date of the last output generation

list member type

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

list type

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

lowest transaction amount

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

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

net revenue

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

Total Revenue – Actual Cost

operational costs

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

- Lettershopping
- Printing
- Paper

output process

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

overhead cost

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

package costs

Costs for anything applied to the package, such as:

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

predicted response rate

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

response media

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

response stage

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

response state

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

Solicited – Contact has been solicited but has not responded.

SolicitedResponse – Contact has responded to a solicitation.

UnsolicitedResponse – Contact has responded but was never solicited.

OptOut – Contact has opted out of the solicitation.

revenue per thousand

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

(Total Revenue x 1000) / number of pieces mailed

ROI percentage

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

(Total Revenue – Actual Cost) / Actual Cost

seed lists

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

solicitation

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

source code

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

source code ID mode

Configuration setting to generate source codes manually or automatically

source code type

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

source list

List specifying contacts to be solicited

synchronize responses

Option that triggers the response recognition process

target revenue

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

total cost

Calculated according to budget level:

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

  total revenue

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

Terms to know: Segmentation

n-Select segments

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

segment

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

segment definition

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

segmentation job

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

Terms to know: RFM Analytics

frequency

Number of times a contact has transacted with an organization

monetary

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

population query

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

quintile

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

recency

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

transaction query

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

Setting up Basic Campaigns

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

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

With Campaign Management, campaign staffers can:

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

What must be done before you can start?

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

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

Putting it all together

The process of basic campaign management includes the following actions:

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

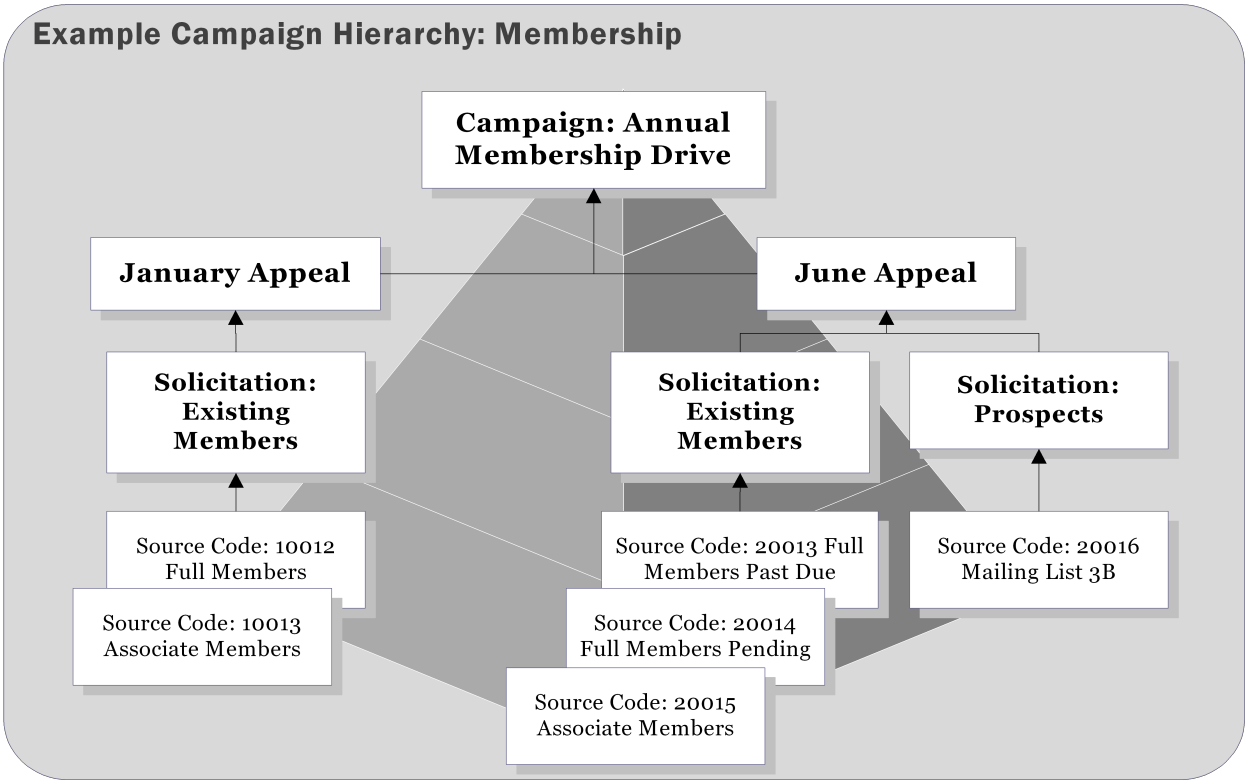
Campaign hierarchy

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

1. Campaign – A strategy to accomplish a single marketing goal. The campaign is the highest level of organization and measurement.
2. Appeal – Each major marketing effort of a campaign, usually associated with a drop date (the date the effort is sent out). Appeals are the building blocks of your campaign.
3. Solicitation – A communication effort sent to a targeted group. Solicitations can be sent as letters, email messages, phone calls, or other means.

4. Source Codes – Numbers assigned to each possible response for a specific solicitation (such as reply cards, phone calls, donations, or purchases). Your organization tracks responses with these numbers to measure the effectiveness of each solicitation. Source codes are the most granular level of measurement in a campaign.

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



   Example membership campaign

   ### Viewing campaigns

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

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

To filter campaigns by criteria

1. From Marketing, select Campaign definition.

   By default, iMIS displays all Active campaigns for which you have security access privileges.

2. Choose a filter, if desired.
3. Select the campaign you want to view. The campaign overview displays.

   The tabs along the top of the campaign display information about the campaign:

- The Summary tab displays general information about the campaign.
- The Profile tab displays general information for editing.
- The Appeals tab displays the appeals associated with the campaign.
- The Security tab displays access levels for defined security roles.

To sort the campaign list

1. From Marketing, select Campaign definition.
2. Click a column header to sort by that column.

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

To view campaign details

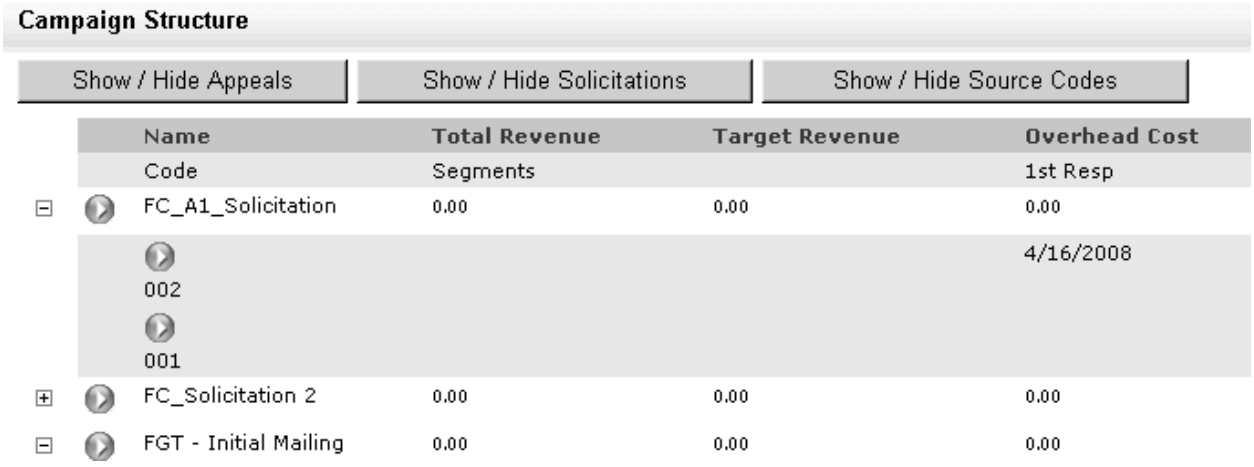
1. From Marketing, select Campaign management.
2. Choose the level of detail to view:

- Show / Hide Appeals
- Show / Hide Solicitations

- Show / Hide Source Codes

Campaign Structure page

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



From Marketing, select Campaign management

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

Planning the campaign

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

1. Setting goals for the campaign
2. Defining campaign components and hierarchy
3. Defining the budget and cost tracking, if any
4. Identifying targets

5. Specifying marketing efforts
6. Defining campaign performance measurement

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

   #### Setting goals for the campaign

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

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

An objective then states a measurable amount, such as:

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

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

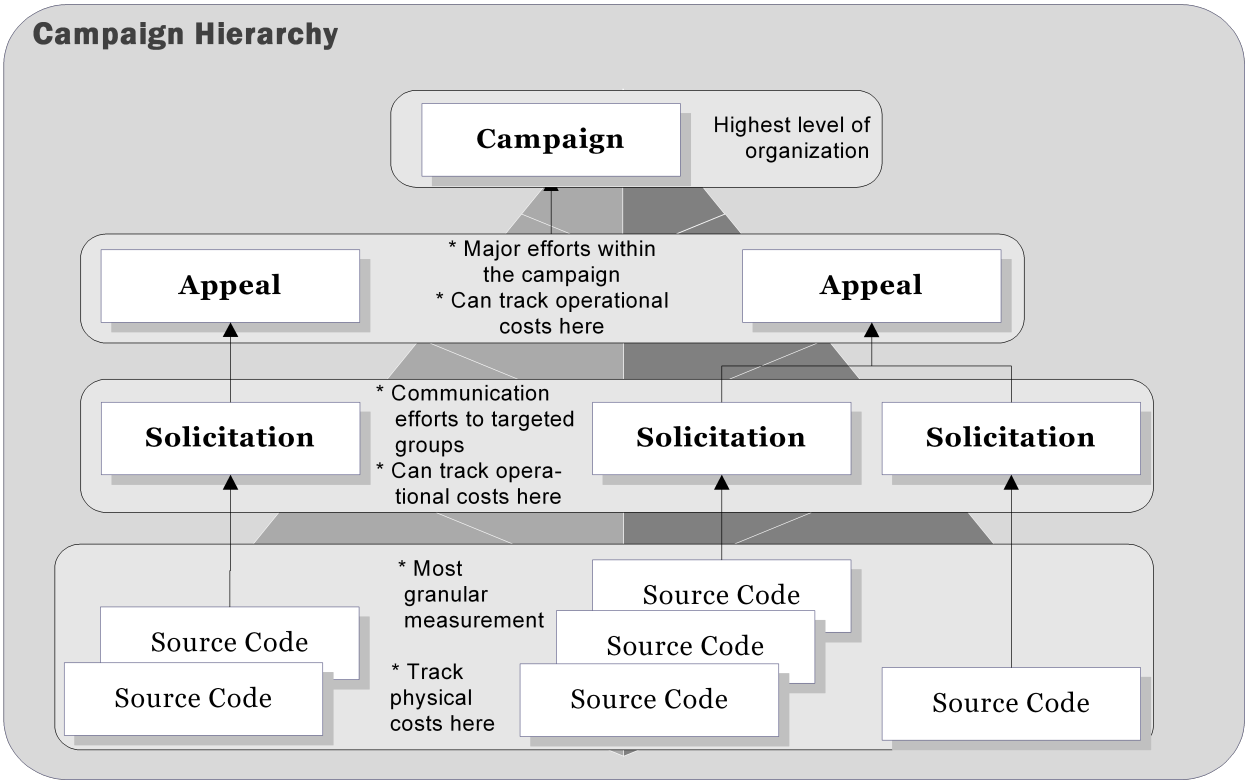
Defining campaign components and hierarchy

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

Tips on defining campaign hierarchy

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

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



Description of campaign hierarchy

Defining cost tracking data

In marketing campaigns, costs are tracked to calculate metrics such as Net Revenue, Cost per Thousand, Revenue per Thousand and Return on Investment. The cost of a

campaign includes the overall operational costs of the campaign and the individual costs of each "package" that is sent.

Operational costs

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

- Paper
- Printing
- Letter shopping

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

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

Package costs

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

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

These costs are tracked at the source code level.

Identifying targets

Getting the right message to the right person at the right time is critical to the success of your campaign. With Marketing Suite, you can target prospects with simple or sophisticated tools. By precisely defining target markets, you can refine campaign messages

with great accuracy. And you can measure the response rate to the messages for specific groups of people.

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

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

Using external lists

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

Planning communications efforts

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

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

Defining campaign performance

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

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

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

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

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

Defining marketing campaigns

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

Business Goals

To define a campaign:

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

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

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

   To create a campaign

1. Select Marketing > Campaign definition.

2. Click Add a Campaign.
3. Define the campaign:

- Enter a Name and Campaign Code.
- (optional) Enter a Status (Active or Inactive).

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

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

  The status of a child entity cannot be changed to Active if any parent entities have an Inactive status.
- Enter a campaign Type:
- None
- Annual – A campaign that occurs every year
- Designated – Funds generated by the campaign that are committed to a specific entity
- (optional) Enter a Start Date and an End Date.
- (optional) Enter a Predicted Response Rate (the estimated percentage of contacts that will respond to the appeal) and the Last Response Date.
- (optional) Enter a Description.

4. Click Save.

   To clone a campaign

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

- The Name and Campaign Code are different.
- The Created Date equals the copy date.
- The Created By field equals the user who copied the campaign.

- The Start Date, End Date, and Reminder Date are adjusted automatically for the copied campaign.
- The copy has the same structure as the original campaign, including all appeals, solicitations, and source codes.
- All copied source codes contain the same inserts and messages as the original campaign.
- Source lists are not copied.
- If Campaign Management is configured to assign source codes automatically, all new source codes are regenerated automatically.
- If Campaign Management is configured to assign source codes manually, all new source codes are formatted as 'Copy of (original code).' If this code already exists, the code is copied until a unique code is found: 'Copy (sequence #) of (original code).'

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

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

To edit campaign security settings

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

1. Select Marketing > Campaign definition.
2. Create a campaign.
3. Click the Security tab.

4. Select an Access Mode:

- Share (Everyone) – Grants everyone full control.
- Private – Grants full access to those assigned to the project.
- Advanced – Enables the Access Mode drop-down list and allows you to edit the access list. You can select one of the listed access areas or select Custom to choose from a list of defined security roles.

5. Click Save.

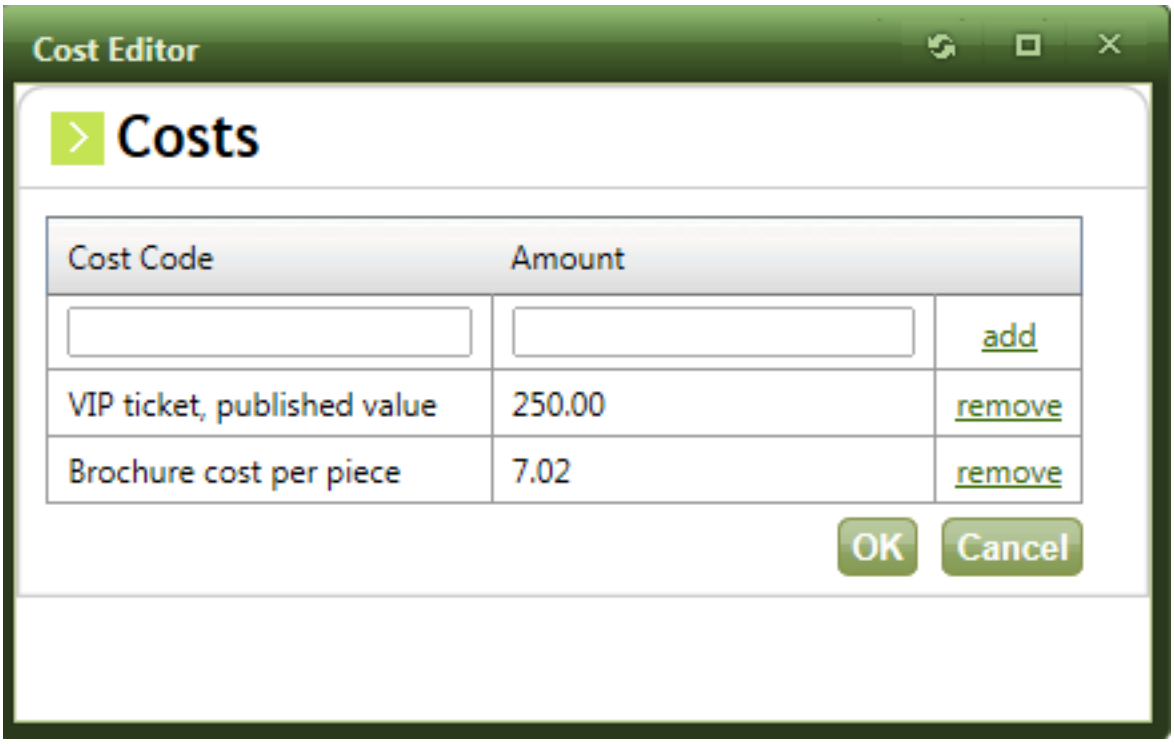
Tracking costs for campaigns

To track costs at the Appeal level

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

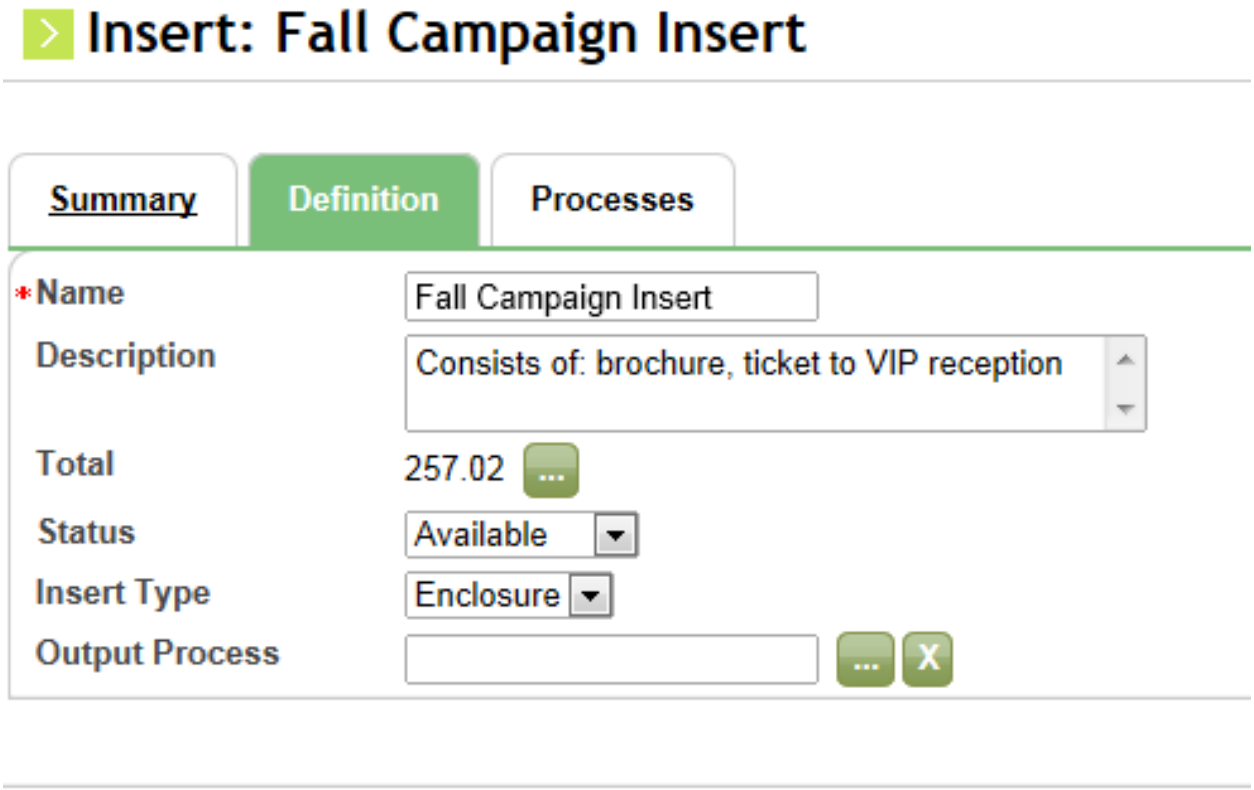
To track costs for an insert

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



6. Click OK to save the values.

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



Sum of inserts

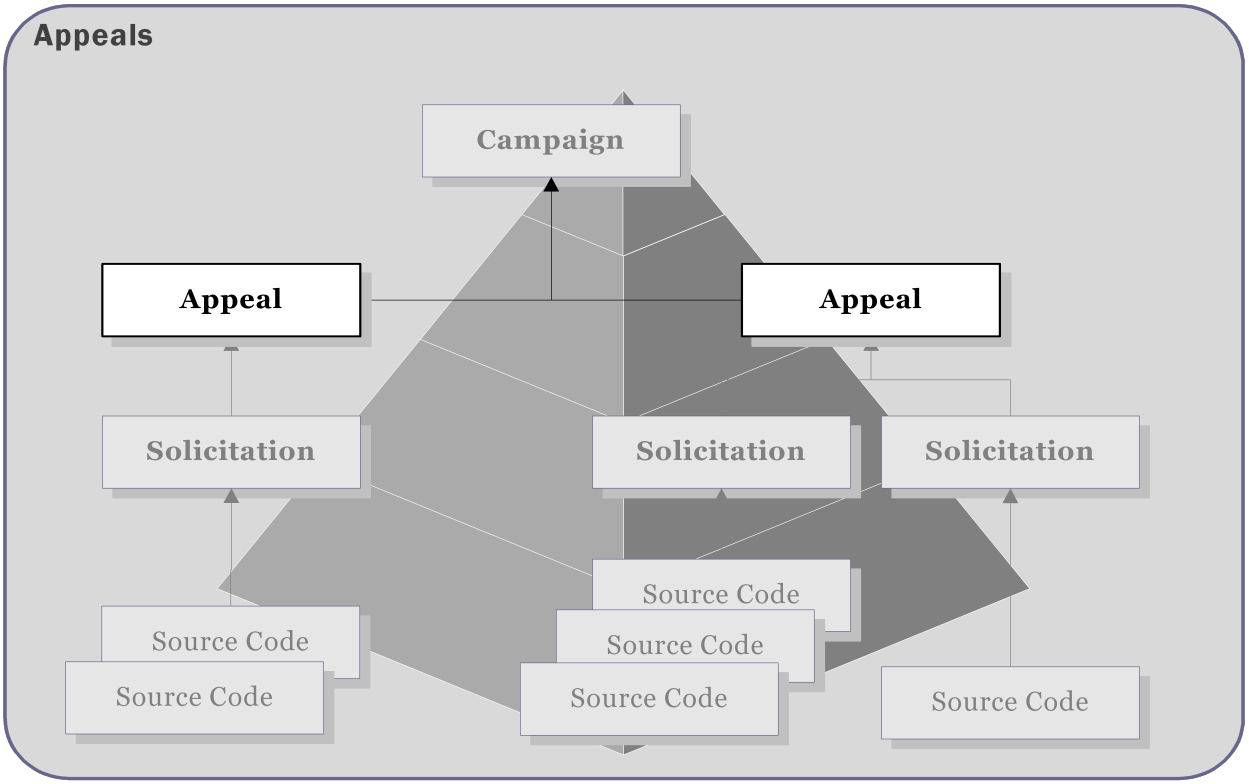
Tips

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

track overhead costs at the Appeal level in your Campaign Management > System Setup options, you still have the option to be able track those additional costs. They are tracked as part of the package attached to the source code.

Defining campaign appeals

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



Appeal level in campaign hierarchy

An appeal is the level of a campaign where you:

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

Important prerequisites to defining appeals

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

Business goals

To define appeals for your campaign, you will:

1. Link specific products to the campaign. Your campaign might include physical products such as apparel, books, and documents or non-physical products such as event functions, gifts, and pledges.

- Set up the products in the appropriate area before assigning them to the campaign.
- Fundraising events: Events > Define an event
- Gifts and pledges: Fundraising > Set up Tables > Appeals or Distributions and premiums
- Physical products: Orders > Manage inventory > Manage products
- Add the products to the appeal(s) in the campaign.
- (optional) Set up minimum required gift amount to receive each product.

2. Assign drop dates.

The definition of drop date depends on the media involved:

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

Drop dates for other efforts can include:

- Mailing list generation
- Creative concepts/artwork complete

- Response management process set up

3. Track costs (optional).

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

   Next step

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

   To create an appeal

1. Select Marketing > Campaign definition.
2. Select the appropriate campaign.
3. Click the Appeals tab.
4. Click Add an Appeal.
5. Define the appeal:

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

- (optional) Enter a dollar amount for a Target Revenue value.
- (optional) Enter a Description.

6. Click Save.

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

   To assign a product to an appeal

1. Open a campaign.
2. Click the Appeals tab and select an appeal.
3. Click the Products tab.
4. Select a Query to view:

- All Products
- Products By Code

5. Select the desired products.

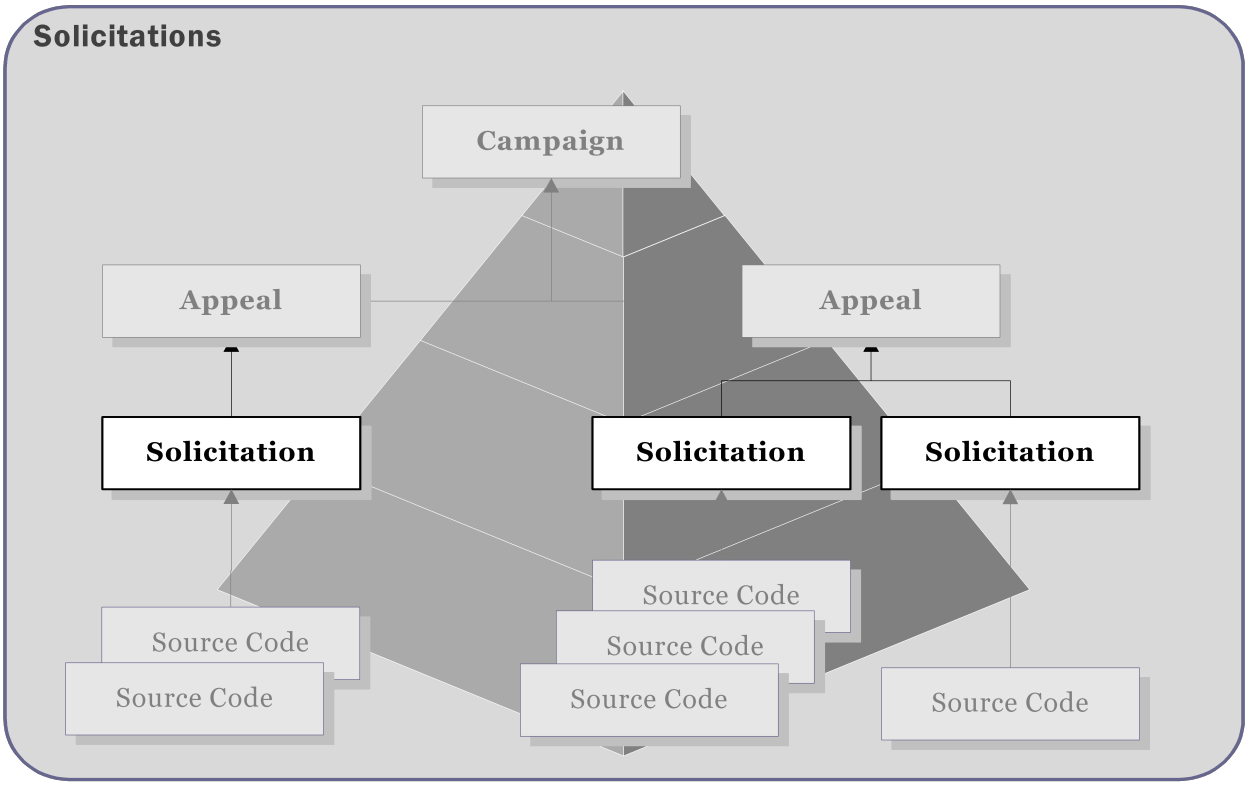
   The added products display in the list of Selected Products.

6. Click Save.

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

Defining solicitations

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



Solicitation level in campaign hierarchy

Solicitations can be:

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

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

To create a solicitation

Before you begin

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

1. Select Marketing > Campaign management.
2. Select a campaign and then select an appeal.
3. Click the Solicitations tab.
4. Click Add a Solicitation.
5. Define the solicitation:

- Enter a Name.
- Select a Status (Active or Inactive).
- If the status is changed from Active to Inactive, the status of all child entities is set to Inactive.
- If the status is changed from Inactive to Active, the status of child entities is not affected.
- The status of a child entity cannot be changed to Active if any parent entities have an Inactive status.

6. (optional) Enter a Start Date and an End Date.
7. (optional) Enter a Display Predicted Response Rate (the estimated percentage of contacts that will respond to the appeal), Description, Reminder Date, and Last Response Date.
8. Click Save.

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

   Tips

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

Specifying communication efforts

Business goals

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

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

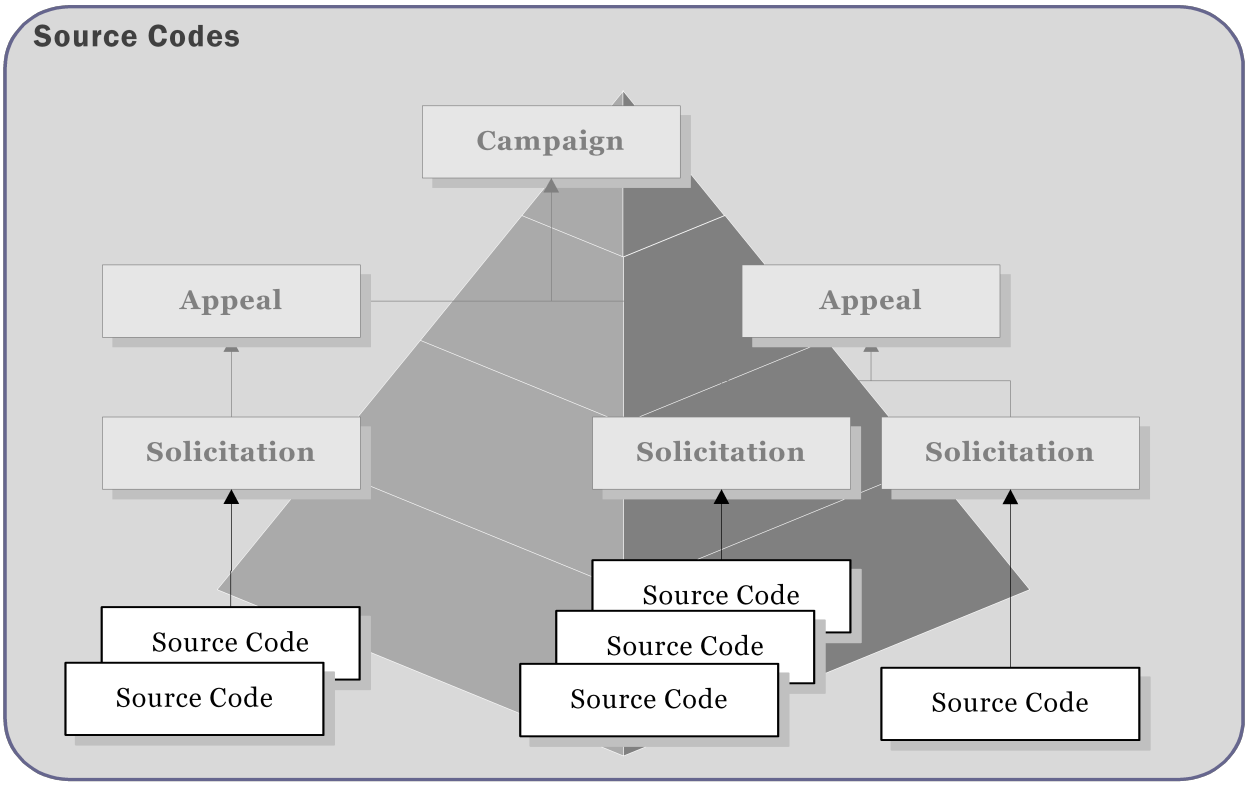
Defining source codes

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

Use sources codes to:

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

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



Source code level in campaign hierarchy

There are three general kinds of source codes:

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

Important prerequisites for defining source codes

Before you can define source codes:

- Define one or more solicitations.
- Set up source lists.
- Create an insert for the source code.

Tips for defining a source code

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

To create a source code

1. Open a campaign, appeal, and solicitation.
2. Click the Source Codes tab.
3. Click Add a Source Code.
4. Define the source code:

- Enter a Code (if not automatically generated).
- Select the Source Code Status (Active or Inactive).
- (optional) Enter a Description.
- Select the List Member Type:
- Contact – Queries contain the NetContact business object.
- Prospect – Queries contain the Prospect business object.
- (optional) Enter the Predicted Response Rate, Last Response Date, and Last Drop Date.
- (optional)Select the Source Code Type:
- RunOnce – The source code will be used only once.
- RunMany – The source code will be used more than once.
- ExternalList – The source list is an external file. Enter the External File Name and External List Count.

5. Click Save.

Defining inserts

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

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

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

Output processes

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

To create an insert

Before you begin

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

1. Select Marketing > Inserts.
2. Click Add an Insert.
3. Define the insert:

- Enter a Name.
- (optional) Enter a Description.
- Click the Browse icon for Total cost information.
- (optional) Select the Status (Available or Unavailable) and Insert Type:
- None

- Brochure
- Envelope
- Form
- Postage

4. Browse to select an Output Process.
5. Click Save.

Tips

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

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

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

Selecting target groups

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

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

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

To create a source list

Before you begin

- Make sure all applicable queries are defined.
- Create all applicable segmentation jobs and definitions.
- Create multiple source lists for use with single source codes.

1. Open the campaign.
2. Select a source code.
3. Click the Source Lists tab. (If the source code uses an external list, the Source Lists tab is not available.)
4. Under Add Source List, choose the Select Type:
   - Segment Definition – Select a segmentation job.
   - Solicitation Response – Select a campaign.
   - Query – Select a stored query.
5. Click Save.

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

Generating marketing output

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

- MS Word merge – Print letters, acknowledgements, and other MS Word documents.
- Email merge – Send email messages to contacts.

- Campaign list export – Generate a list of contacts for an external service or for mass email output.
- RFM definition – Rank records based on Recency, Frequency, and Monetary value.
- Project process outputs – Generate projects for further relationship building.

Important prerequisites for generating output

Before you run output processes:

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

Business goal

To run output processes, you will:

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

To generate output

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

8. Click the Source Lists tab.
9. Select a source list or create a new one.
10. Click Save.
11. Click Generate Output.

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

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

Monitoring and measuring performance

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

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

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

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

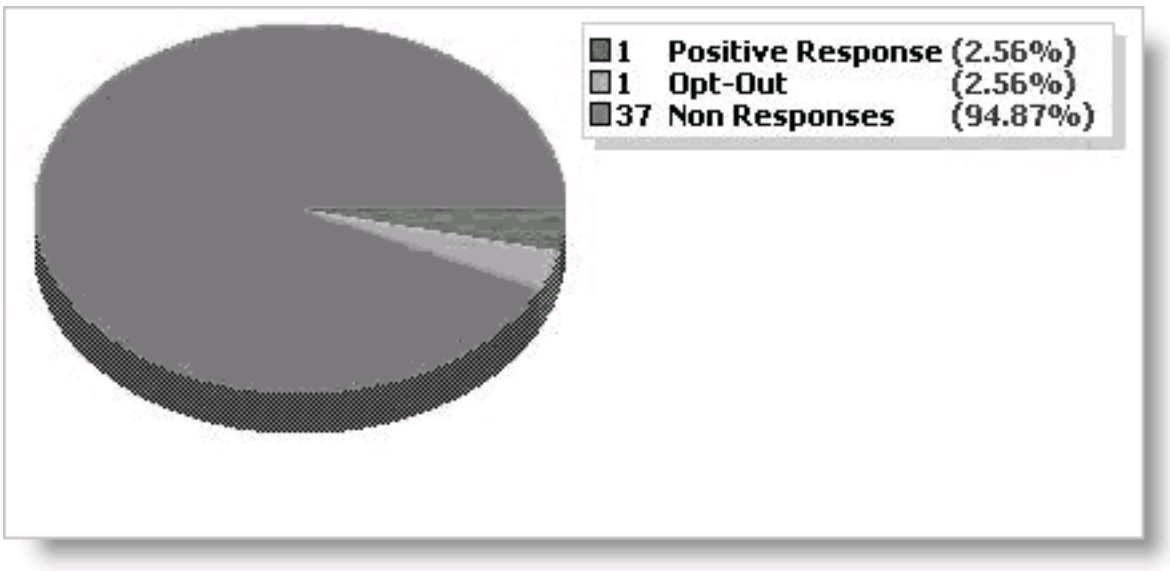
Tracking responses

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

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

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

- Contacts associated with the source code
- Non-responses and opt-outs
- (optional) Financial transactions associated with the campaign (orders, events, gifts, pledges, billings)



Example display of responses to a solicitation

Tips for tracking responses

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

Business goals

To track the responses to your campaign, you will:

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

Events responses

You can associate events with your campaign and track responses:

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

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

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

Dues responses

You can associate payments with your campaign and track responses:

- Payments for multiple products that have the same source code are counted as one response. Payments for multiple products that have different source codes are counted as multiple responses.
- Cancelling a billing fundraising item decrements total revenue, but does not affect other campaign statistics.

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

Synchronizing campaign responses

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

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

To synchronize responses

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

   A status message displays noting that the responses are being synchronized.
3. Go to System Setup > Workflow Monitor (on desktop) or Tools > Workflow (on your iMIS-enabled website) to observe the synchronization's status.

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

Creating projects from Campaign Management

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

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

To create projects from a campaign

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

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

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

Acting on responses

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

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

To create a response stage

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

1. Open the source code.
2. Click the Source Lists tab.
3. In the Add Source List area, Select Type of Solicitation Response.
4. Select a campaign.
5. For each campaign response stage:

- Select an Appeal.
- Select a Solicitation.
- Select a Source Code.
- Select a Comparison value (Equal or Not Equal).
- Select a response State:
- Solicited – Contact has been solicited but has not responded.
- SolicitedResponse – Contact has responded to a solicitation.
- UnsolicitedResponse – Contact has responded but was never solicited.
- OptOut – Contact has opted out of the solicitation and will be excluded from any future lists for this campaign, appeal, and source code.

  Note: If a source code is provided with the response, the system assumes the contact was solicited.
- Click add.
- Select a Global Operator that applies to all solicitation state expressions (AND or OR).

6. Click Save.

The solicitation response displays in the Source Lists.

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

To view responses

Before you begin

Before you can view responses, you must:

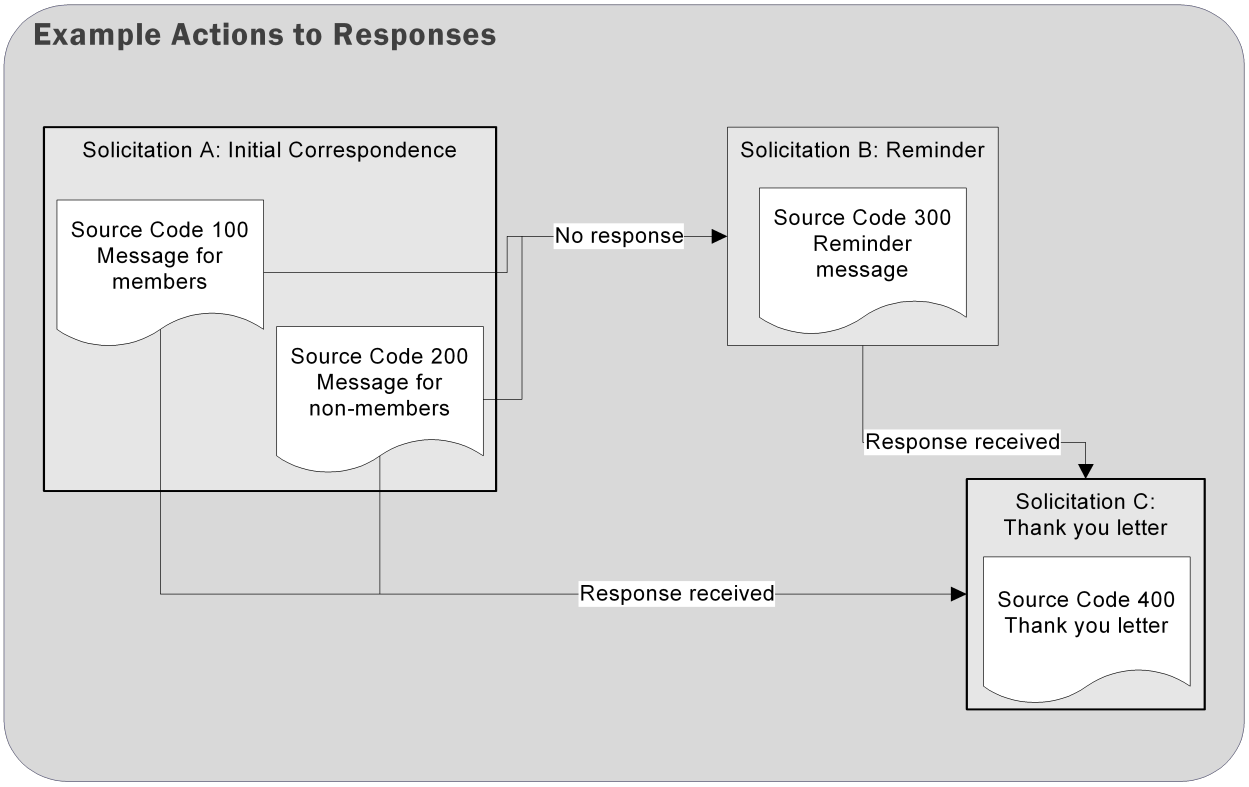
- Create response stages
- Synchronize the responses

1. Select Marketing > Record responses.
2. Find the desired contact.

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

Example: Response actions

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



Response process example

Basic campaign example: Professional conference

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

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

Planning the campaign

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

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

The hierarchy for this appeal is simple:

Campaign = Annual Conference

Appeal = Save the Date postcard

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

First Mailing

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

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

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

Second Mailing

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

The basic structure for this appeal is:

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

So far, ABBA has a sound plan:

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

Defining the campaign

Campaign definition is straightforward:

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

Defining the appeals

Define each appeal:

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

Defining the solicitations

Define each solicitation similarly to the first one:

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

Specifying communication efforts

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

Select target groups

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

Create inserts

Create inserts for each mailing similarly to the first one:

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

Define source codes

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

Set up source codes similarly to the first one:

- Code = 000134
- Description = Segment 1
- Status = Active
- Predicted Response Rate = 7.5%
- Target Revenue = $7500 (from attendees who want to register immediately)
- Source Code Type = Run Once
- List Member Type = Contact
- List Type = Segment Definition
- Add Segment 1
- Attach insert to a package: Add Conference Save the Date Postcard Creative A.

Generate output

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

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

  Repeat for the second appeal when appropriate.

  Example display

  This example campaign will display similarly to:

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

  Example: Professional conference display

Getting Started: Complex Campaigns

Complex campaigns for the purposes of this document:

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

Setting up complex campaigns

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

In Segmentation

1. Write the universe query that defines who receives the marketing effort.

2. Create the segmentation job or optionally, attach the universe query to the job.
3. Write the segment queries that will separate your universe into smaller target groups, such as by membership category or by transaction types or by event.
4. Create the segment(s) by attaching segment queries to each segment.
5. Populate the segments.

In Campaigns

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

Tips for setting up complex campaigns

- Plan first. Building a spreadsheet of the basic structure early makes it easier to test and train users.
- Think about data criteria. Most marketing efforts use inclusion and exclusion criteria to generate their list within their system. In fundraising organizations, this is particularly so. How are you going to determine what that criteria is and how are you going to manage the information as customers 'opt-in' and 'opt-out' of different marketing activities?
- Think end-to-end marketing. Many marketing efforts are not isolated campaigns but are part of a broader, cyclical plan. Be prepared for that and factor it into your planning.
- You can track budgets at the appeal level or the source code level. This tracking allows you to define overhead costs and the cost of individual inserts. The method you use to track budgets also determines how costs are entered, recorded, and calculated within the Campaign Management module.
- If your organization does not use complex segmentation, set the budget level to Appeal.

- If your organization uses complex segmentation, especially with insert testing, set the budget level to Source Code.
- Decide whether you need a single source code or several:
- Newsletters and similar mailings are rarely personalized beyond the mailing label attached to the piece. For this reason, although a template segmentation job is probably going to be used, a single source code will be assigned for each issue. This may be printed on the newsletter or mailing but it may not be. The issue number or cover article may be enough to be able to track the source code at the customer level.

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

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

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

About Segmentation

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

- Create targeted contact and prospect lists according to demographic and behavioral patterns or other include/exclude criteria.
- Split segments into multiple lists and prioritize the segments.

- Eliminate duplicates in lists.
- Perform controlled and repeatable list pulls.
- Create n-Select or random select segments for message or delivery testing.
- Get counts for communications collateral before production.
- Assign unique source codes to segments to effectively analyze an effort's success.
- Copy segmentation jobs and purge inactive jobs.
- Reuse query definitions for multiple campaigns.

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

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

Segmentation jobs have two levels of hierarchy:

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

Business goals

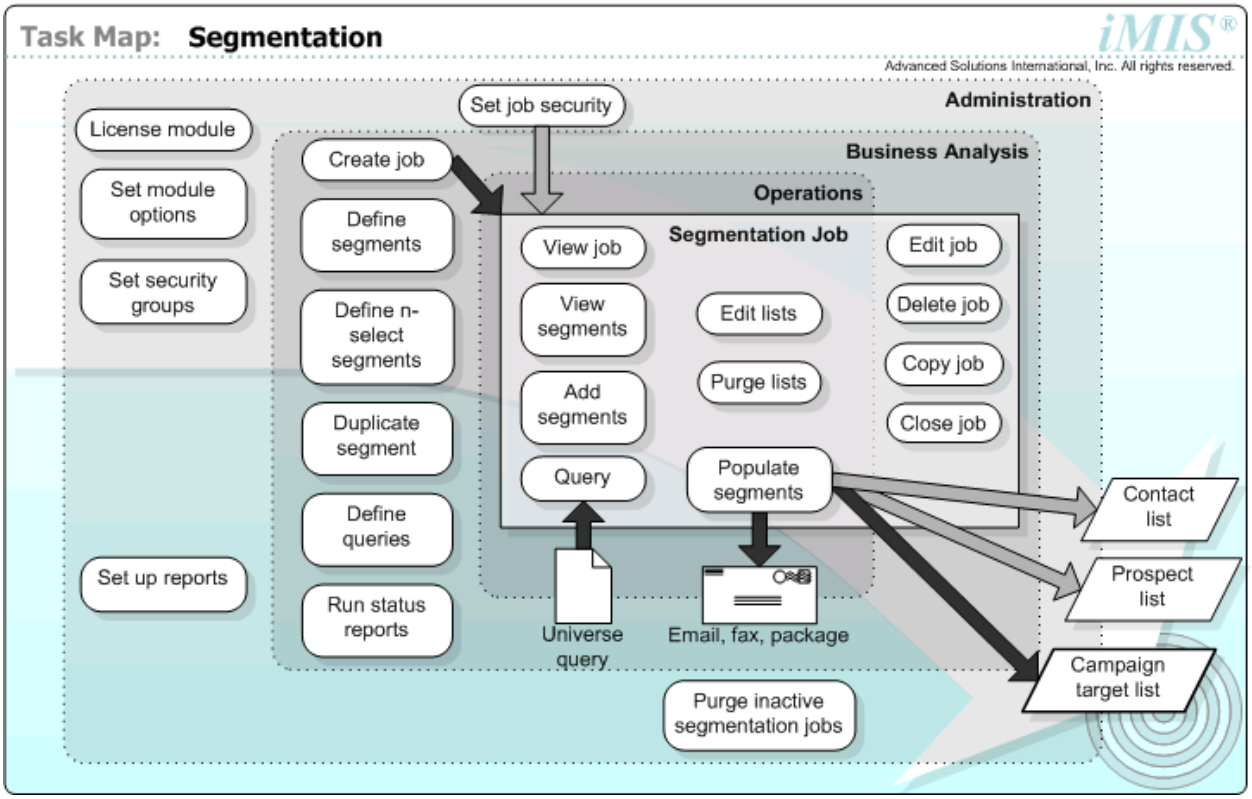
The steps to create segmented lists are:

1. Create a segmentation job.

2. Add, split, and/or delete segments.
3. Populate the segments to create lists.

Task Map: Segmentation

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



Task map: Segmentation

Viewing segmentation jobs

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

If you filter the segmentation jobs view by description, all segmentation jobs with matching description fields display.

If you filter the segmentation job view by creation date, you can view segmentation jobs created on a specified date or during a specified date range:

- To view segmentation jobs created on a specified date, enter the date.
- To view segmentation jobs created during a specified date range, enclose each date in double quotes and separate the dates with a comma (for example, “1/4/2008”,”1/8/2008” specifies jobs created January 4, 2008 through January 8, 2008, inclusive).

Creating a segmentation job

A segmentation job contains the job definition, security settings, and segment definitions used to generate contact or prospect lists.

There are two types of segmentation jobs:

- Contact jobs – All queries for a Contact segmentation job must contain the Contact business object as a source.
- Prospect jobs – All queries for a Prospect segmentation job must contain the Prospect business object as a source.

> **Note:** Note: When you set the type as Contact or Prospect, the system automatically defaults to the correct business object.

Each segment is assigned an execution order to make sure duplicates are not generated. What is often different from appeal to appeal is the exclusion criteria you apply.

> **Note:** Note: After selecting an additional source table, you must define a Custom relationship between the tables; in most cases, you can use the ID field for the join.

Universe queries

A "universe" query defines the entire population of contacts for a segmentation job. When a universe query is present, a contact must be a member of the universe query for the contact to be included in any of the segments within the segmentation job.

If a universe query is defined for the segmentation job, it must be included as a source for any segment-level queries. The system automatically populates this. Universe queries are required only when defining n-Select segments.

> **Note:** Note: When adding a pre-existing universe query, check the source to make sure that the Contact business object is one of the sources. If Contact is not a declared source, the query will fail.

n-Select segments

n-Select segments list contact/prospect records returned by a selection filter in a number (n) of segments, with an equal number of contacts or prospects in each segment.

To create n-Select segments, you must include a universe query in the segmentation job. The universe query can include the results of a previous segmentation job as a source.

> **Note:** Note: If you have defined n-Select segments for a segmentation job, you must create these segments before you can populate the lists.

To ensure that your n-Select segments are successfully populated, make sure you do not exceed the total number of records returned by the universe query when you define the n-Select segments. For example, if the query returns 500 records, you can define n number of segments, each consisting of x number of contacts or prospects per segment, as long as n times x is less than or equal to 500.

Exclusion segments

Exclusion segments are any segments in the segmentation job that are not linked to a source code. Since each record can only be retrieved once, creating an exclusion segment in the segmentation job results in any records retrieved by an exclusion segment not being retrieved by later segments. For example, if two appeals are being dropped in a short period of time, you may want to include one or more segments in one appeal but not in the other.

Exclusions are applied at the segment level, and they can appear anywhere within a list of included segments, with these exceptions:

- Universal exclusions (No Mail Flag or Bad Address) should be the first segments entered in the segmentation job.

- Include segments have a link to a defined source code and should be defined after any universal exclusion segments.

  If you specify a number of random records to return for a segment, the resulting list may contain fewer than the specified number of records. The segments are first populated and then checked for duplicate contacts or prospects. If duplicates are found, they are removed, and the segments from which they were removed will contain fewer than the specified number of records.

  To create a segmentation job

1. From Marketing, select Segmentation.
2. Select Add a Job and enter the job definition.
3. From the drop-down menu, select the Type.
4. (optional) Apply a filter (universe) query to the job. You can create a new query or use an existing query. These queries can be added later.
5. (optional) To define and create n-Select segments, click the n-Select tab. Enter the number of segments and the number of contacts per segment.
6. (optional) To modify the security settings for the job, click the Security tab.
7. (optional) To define explicit segments, click Segments:

- Enter segment definitions.
- Select an existing query or create a new query.
- (optional) Select the number of random records to use to populate the segments.
- (optional) Modify the Priority.

8. Select Save.

> **Note:** Note: Add or edit segments before closing the job.

Creating source codes based on segment definitions

Before you begin

- Create the source lists for which you want to create source codes.
- Create the segmentation job and add segments to the job.
- Generate output so that the lists are populated.

To automatically create source codes based on segment definitions

1. From Marketing, select Campaign Management.
2. Open a campaign and view the Summary tab.
3. Click Create Source Codes from List.
4. Create the source codes:

- If you want to build source codes based on solicitation lists, click an available solicitation to add it to the Current Solicitations list and then click Create Source Codes.
- If you want to build source codes based on segments, click the Create from Segments tab, and then click an available populated segmentation job to add it to the Select Segmentation Definition list. If you select Job Name, you automatically select all the segments in the job, or you can pick and choose among the segments by selecting just the segments from which you want to create source codes. Click Create Source Codes.

5. To view the automatically created source codes, click the Source Codes tab on the campaign.

Reusing and copying segmentation jobs

By reusing segmentation jobs or copying and editing them, you can work efficiently. After a targeted list pull, you can save the job and refresh the list to run it again. As the campaign progresses, you can copy the job, rename it, and adjust the segments to be included.

Consider creating segmentation templates that can be copied and reused with minimal manipulation. If you build a template with the core of the segmentation requirements, the user can copy it and modify it at any time.

Tips for copying a segmentation job

- All segments in a segmentation job are copied when the segmentation job is copied. However, any contacts or prospects contained in a segment are not copied. You must populate the segments in the copied segmentation job to generate contacts or prospects to fill the segments.
- When you copy an existing segmentation job, for convenience the new segmentation job is named "Copy of OriginalJobName" (for example, "Copy of Contacts"). Rename the copied segmentation job and edit it as desired.
- If any segment editor pages from the original job were open when the job was copied, these windows will still reference the original job. To edit the segments in the copied segmentation job, you must select the Segments tab after copying the segmentation job and open the segments individually.

To copy a segmentation job

1. From Marketing, select Segmentation.
2. Open an existing job. Click Save As and rename it.
3. Open the new job.
4. Edit, add, and/or remove segments.
5. Adjust query filters.
6. Click Populate Segments.

Example: Creating a segmentation job

In this example, we want to mail catalogues to individuals who have not yet registered for conference and exclude those who have registered.

Exclude: Already Registered for the Conference

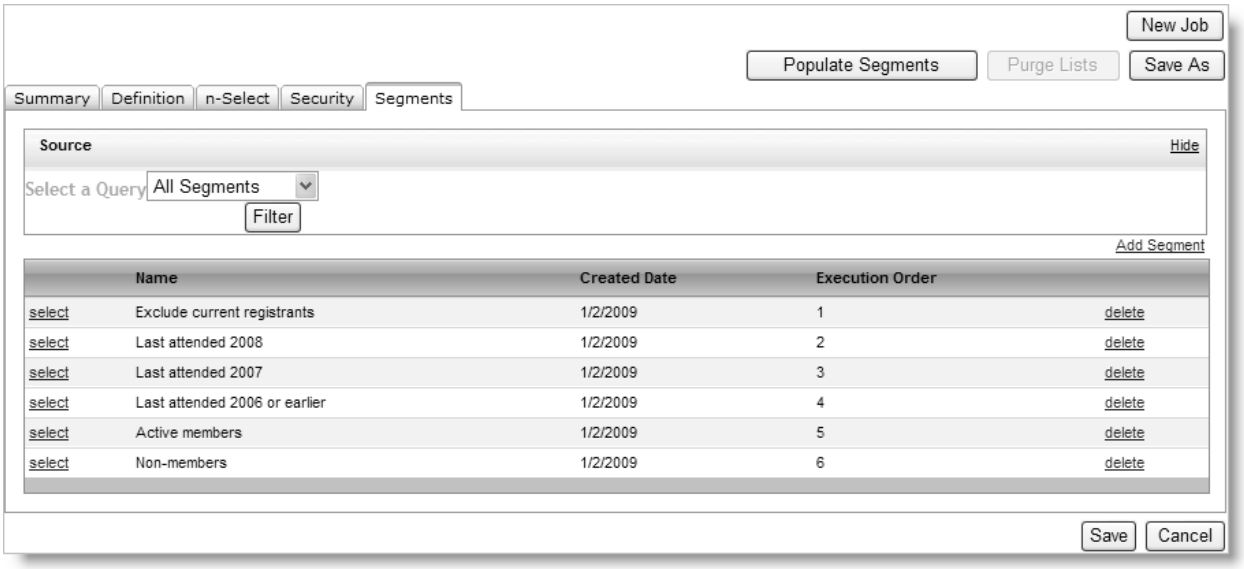
Include:

- Last attended 2008
- Last attended 2007
- Last attended in 2006 or earlier

- Never attended - Members
- Never attended - Non-members

  Execution order is important. We want to first exclude those who have registered, and then populate the list with contacts in each segment who have not registered.

  This example displays as:



  Example: Segmentation job

Managing segments in a job

Viewing segments

You can view all segments or filter your view of segments by creation date, description, or name.

To view segments

1. From Marketing, select Segmentation.
2. Open the segmentation job.
3. Select the Segments tab.
4. (optional) Select a filter (by creation date, description, or name) if needed. By default, all segments display.
5. Select the segment to view. The segment definition displays.

6. If the segments have been populated, select the Results tab to view the segment contents.

Adding and editing segments

A segment definition is used to generate contacts or prospects based on demographic behaviors (for example, gender, location, age) and/or transactional behaviors (for example, attending events, purchasing books, or making donations).

> **Note:** Note: After selecting an additional source table, you must define a Custom relationship between the tables; in most cases, you can use the ID field for the join.

> **Note:** Note: Add or edit segments before closing the job.

To add or edit a segment

1. From Marketing, select Segmentation.
2. Open the segmentation job.
3. Select the Segments tab and add a new segment.
4. Enter the segment definition.
5. Using the Population buttons, select an existing query or create a new query.
6. (optional) Select the number of random records to use to populate the segments.
7. (optional) Modify the Priority.
8. Click Save.

Copying segments

If there is an existing segment definition that is similar to the segment definition you need to create, you can duplicate the existing segment definition and modify it as needed.The new (duplicated) segment appears in the same segmentation job as the original.

If you add or insert a new segment in an existing segment, you must manually change the order numbers of all the segments within the segmentation job.

To duplicate a segment

1. From Marketing, select Segmentation.
2. Open the segmentation job.
3. Select the Segments tab.
4. (optional) Select a filter (by creation date, description, or name). By default, all segments display.
5. Select the segment to view.

   The segment definition displays. The Duplicate Segment button does not display until the segment definition has been saved and the segment has been reopened in the Segment Definition Editor window. The Duplicate Segment button does not display when a segment definition is initially created and saved.

   If you do not see the Duplicate Segment button enabled when you open an existing segment definition, either you lack permissions to edit the definition or the lists have not been generated for the segmentation job.
6. Click Duplicate Segment.

   The Segment Definition Editor page closes and the new (duplicated) segment displays in the segments list directly above the segment that was duplicated. Both segments will have the same name.
7. Open the new (duplicated) segment.
8. Edit the segment definition.
9. Click Save.

Splitting segments

You can split a segment into multiple segments (A/B split) by creating additional segments that use the same query.

1. Define the segments in sequence (using the same query).

2. Run the query to determine the segmentation count.
3. After deciding how many records should be retrieved for each segment, retrieve each segment and specify the count for each segment.

> **Note:** Note: Do not specify a count for the last segment; the last one will return all of the unretrieved records.

Deleting segments

You can delete a segment from a segmentation job if the segments have not yet been populated. To delete a segment from a job after the segments have been populated, you must first purge the lists (see "Purging lists").

> **Note:** Caution! Deleting a segment that is referenced in a campaign source code renders that source code unusable.

Populating segments

After you create a segmentation job and add segments, populate the segments in the job to create contact or prospect lists.

When segments are populated, iMIS ensures that segments are not populated with any record that would be a duplicate of a record in another segment that is defined for the same segmentation job.

Populating segments can be a very lengthy operation. Segments are populated as a workflow task; you can continue using iMIS for other tasks while segments are being populated.

You cannot view the results in the populated segments until the segment population workflow task has been completed.

To repopulate segments that have already been populated, you must first purge the lists and then populate the segments.

After the segments have been populated, you cannot edit the segment definitions. To edit a segment definition after the segments have been populated, you must first purge the lists.

To populate segments

1. From Marketing, select Segmentation.
2. Open the segmentation job.
3. Click Populate Segments.

   If no segments are defined, an error message displays.

   If the segments have already been populated, Populate Segments is disabled.
4. Select the segment to view.
5. Select the Results tab to view the segment contents.

Managing segmentation lists

Editing lists

After lists have been populated, you can add contacts or prospects as well as disable any that are already listed (contacts and prospects are enabled by default).

Before you begin

Verify that contacts or prospects to be added are not already in the list. No duplicate checking runs for manually added contacts/prospects.

To edit a contact or prospect list

1. From Marketing, select Segmentation.
2. Open the segmentation job.
3. Select Segments.
4. Select the segment that contains the list to be edited.
5. Select the Results tab.
6. (optional) To add a contact or prospect, click Add Contact.

7. (optional) To enable or disable a contact or prospect, select or deselect the checkbox displayed to the left of the contact or prospect.
8. Select Save.

Purging lists

Purge lists to remove those that you no longer need or to repopulate segments.

> **Note:** Note: The Purge Lists button is available only if the segments are populated.

To purge segmentation lists

1. From Marketing, select Segmentation.
2. Select the segmentation job.
3. Click Purge Lists.

Using external lists

Organizations may use external lists. External lists are brokered with individual list agreements that govern how long and how the use can be used.

Sometimes lists are given to the organization with all names and contact information attached. Other times, lists are used once with the organization only seeing the names of the contacts within it when the customer responds.

Lists with Names

Lists with names can be imported into the iMIS Acquisition Management tool. Campaigns and Segmentation can query this list and generate lists from it. One of the most important segmentation considerations is being able to test against different list rentals, therefore, it's important to have a testing model.

Lists without Names

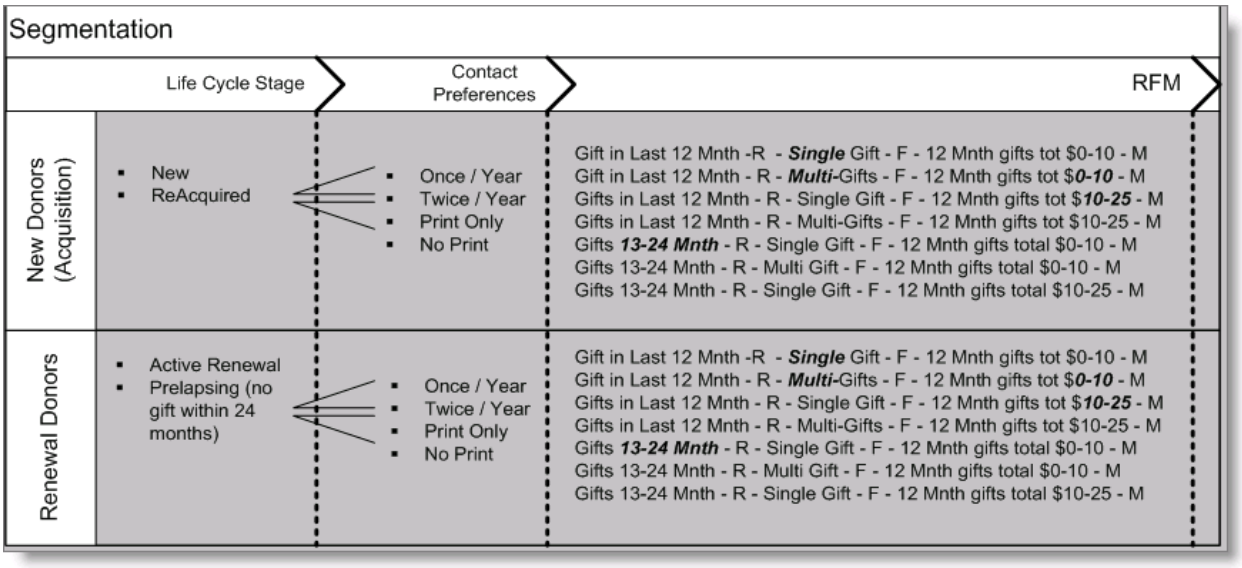
Lists without names can still be tracked in Campaigns. At the source code level, assign the quantities included in the list rental. Track the list rental/purchase cost at the package level. Remember that the package gets attached to the source code. Different packages

have different list costs so it's important to apply the cost to the package to properly calculate the ROI.

Example: Donor Segmentation

The following is an example of how a segmentation strategy can appear or be mapped during implementation. This example shows one audience that is separated into "life stages". It relies upon keeping track of customer contact preferences and uses RFM as the fundamental segmentation strategy.

For this example, Life Cycle Stage and Contact Preferences are the include/exclude selection criteria. RFM segment definitions will apply to everyone who has who has been selected during core criteria segmentation.



Example: Life cycle stages

Example: Event marketing

Association XYZ is preparing to market its annual conference. The venue is booked and sponsors and expo sales are under way. It's time to start raising awareness for the event and getting event registrations through the door.

In this example,there are two different marketing efforts that the association runs to meet these goals. The first is one tests a creative concept for the event. They want to understand which creative concept is more likely to get people to register.

After the creative concept is finalized and 80% of the speakers have been set, the organization is ready to recruit attendees by mailing the event brochure.

Marketing Goal

To recruit attendees for the annual conference.

Marketing Objective

To recruit 500 full conference attendees, 200 partial attendees.

The goals and objectives for this campaign are fairly straight forward. But accomplishing these goals is more complex.

First Mailing: Post Cards

First, XYZ does an A/B Split of the file to understand which creative concept is the better one to use for the rest of the conference marketing series.

Second Mailing: Full Brochure

The second mailing is where we apply some value ranks to our mailing. Full conference brochures are expensive and our goal is to cut numbers to save costs from groups who are least likely to respond.

Planning the campaign

Segmentation will be used in two different ways:

- Mailing 1 = Simple Split
- Mailing 2 = Ordered from most to least likely to respond

Annual Conference	Save the Date Postcard Mailing	Fountain Creative A	Source Code
		Dessert Creative B	Source Code
	Full Brochure Mailing	Past Attendees	Last Attended 08
			Last Attended 07

	Last Attended 06 or earlier
Non-Attendees	Active Members
	Non-Members

Business Goals

The process to accomplish this scenario is:

1. Create a segmentation job with an A/B split.
2. Build the campaign structure for the event.
3. Generate output and pickup file for the solicitation.
4. Review responses to choose most successful concept.
5. Create a segmentation job with all segment definitions.
6. Mail brochure to list.

Creating a segmentation job with an A/B split

Add a new segmentation job:

- Name = Annual Conference

Create a new query:

- Source – NetContact.
- Filter – Is A Company = No.

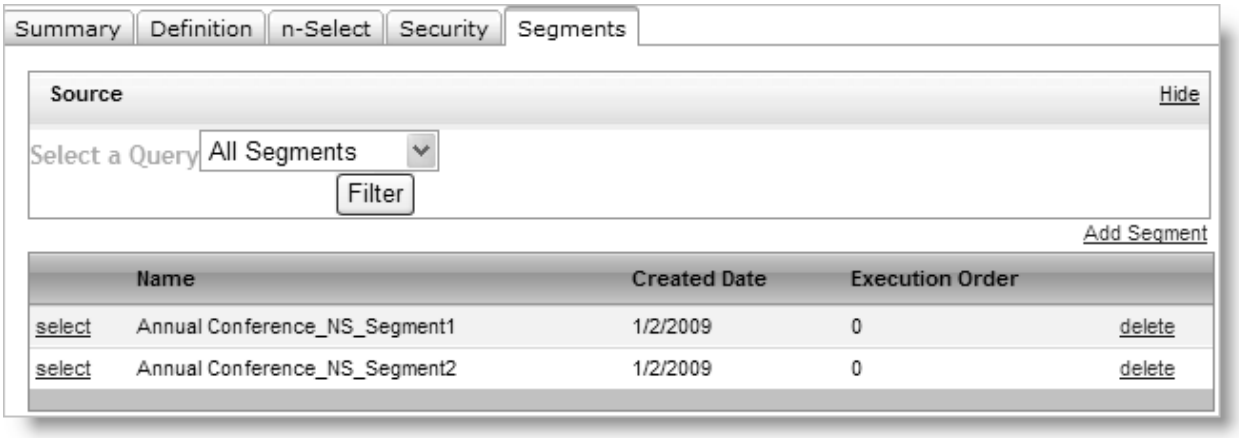
Define the n-Select segments:

- Number of Segments = 2
- Use all query results = selected
- Contacts per Segment: Enter the number of records at which you want to cap your seg-

ments. If you want two random groups with no cap, leave the 'Use All query Results' checked and enter the number of segments as two.

Populate the segments.

Two segments are created; both have an Execution Order of zero.



Example: Conference post card list with A/B split

Building the campaign structure for the event

Define the campaign structure:

- Name = Annual Conference
- Appeal = Save the Date postcard
- Solicitations = Creative A and Creative B

Attach the populated segments to the campaign:

- Select the job that contains the A/B split.
- Select a source code. The source code is attached automatically as the source list for the query.
- Select an insert and attach it to the source code.

Generating the output and the pick-up file

After the list and insert are attached, generate the output on the source code. This process will:

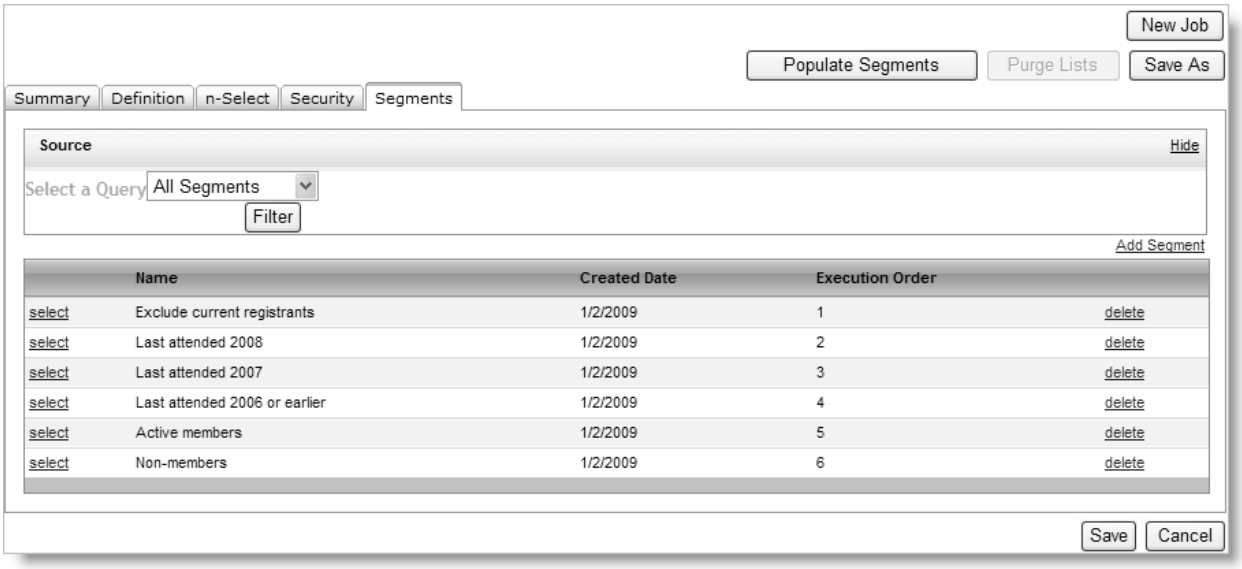
- Update the pie chart and metrics for non-responders
- Produce the output defined in the insert

Setting up the brochure mailing

The brochure mailing will use many different segments. Each segment will become a source code.

Annual Conference Full Brochure Mailing Past Attendees	Last Attended 08	
	Last Attended 07	
	Last Attended 06 or earlier	
Non-attendees	Active Members	
	Non-members	

Open the segmentation job for this mailing and click the Segments tab. Your display may look like the following example:



Example: Segments list

Set up six segments.

The first segment is called Exclude - Current Registrants. It includes a query that produces a list of people who are already registered for the conference. By creating this first segment, XYZ will be able to use this job repeatedly.

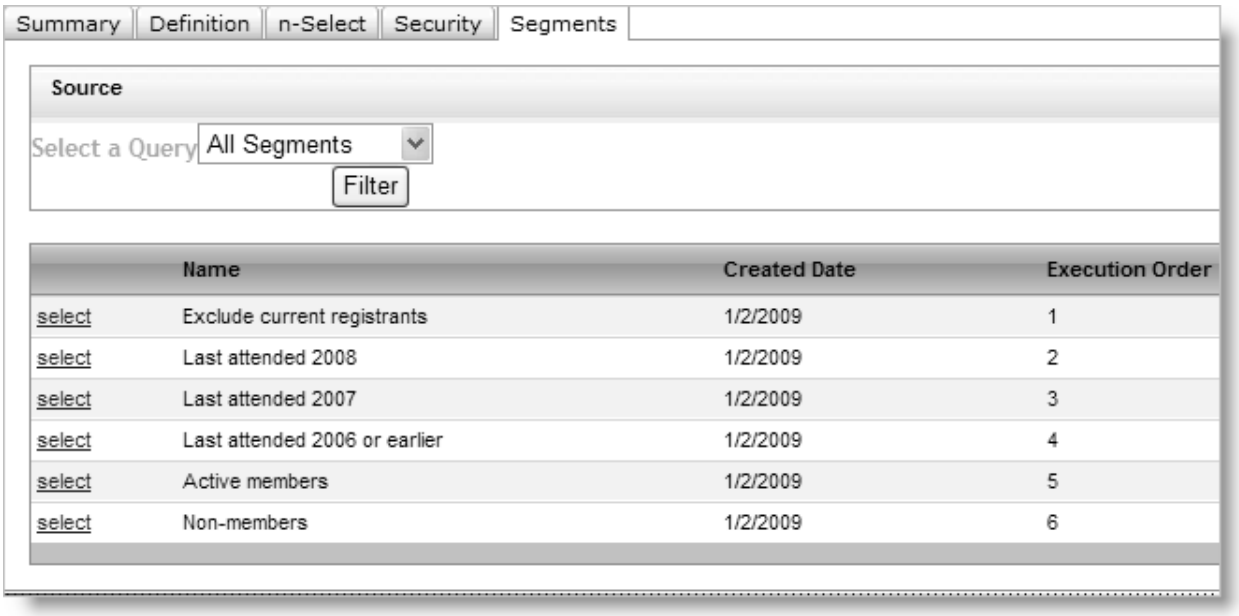
The Execution Order determines the order in which records will be selected. A loyal member has probably:

- Registered for this year's event
- Attended last year's and prior years
- Renewed their membership so they're an active member

  Therefore, attach all of the segments to the job except the first. Duplicates in the file will be checked automatically to make sure that a record is only selected once.
- Select everyone who has registered for the event (don't mail them).
- Of the records left in the database, select everyone who registered last year. That segment is the first source code and are also the most likely people to respond this year
- Of the records left in the database, select everyone who registered the year before last. That segment is the second source code and are the second-most likely to respond this year
- Of the records left in the database, select everyone who attended two years ago. That segment is the third source code.
- Continue with the remaining segments.

Creating a segmentation job with all segment definitions

1. Add a new segmentation job.
2. Define the first segment by writing a simple query that defines who should be selected.
3. Define the remaining segments.
4. Assign each segment an execution order that determines the order in which to execute the duplicate checking process.
5. Populate the segments.



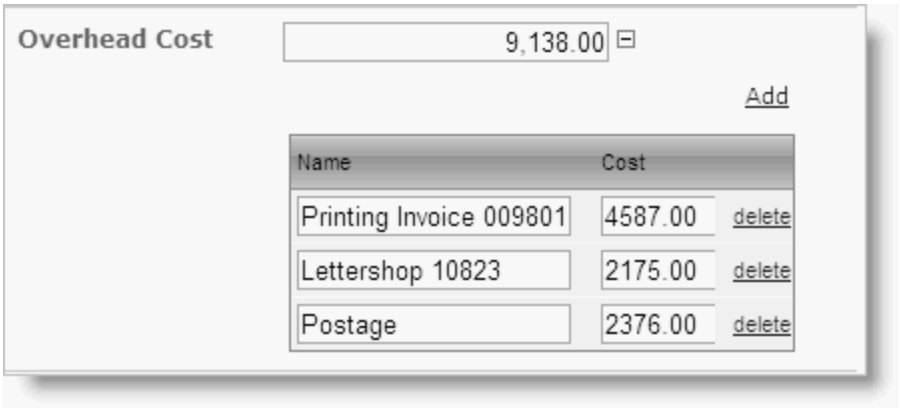
Adding to the campaign structure

- Campaign = Annual Conference
- Appeal = Full Conference Brochure
- Solicitations:
- Past attendees
- People who have never attended
- Source Codes (first mailing):
- Last attended last year
- Last attended two years ago
- Last attended three or more years ago
- Source Codes (second mailing):
- Never attended (members)
- Never attended (non-members)

Tracking costs for campaigns

To track costs at Appeal or Source Code level

1. Go to Campaign Management.
2. Click Show / Hide Appeals and open an appeal.
3. Go to the Profile tab and open the Overhead Cost panel.

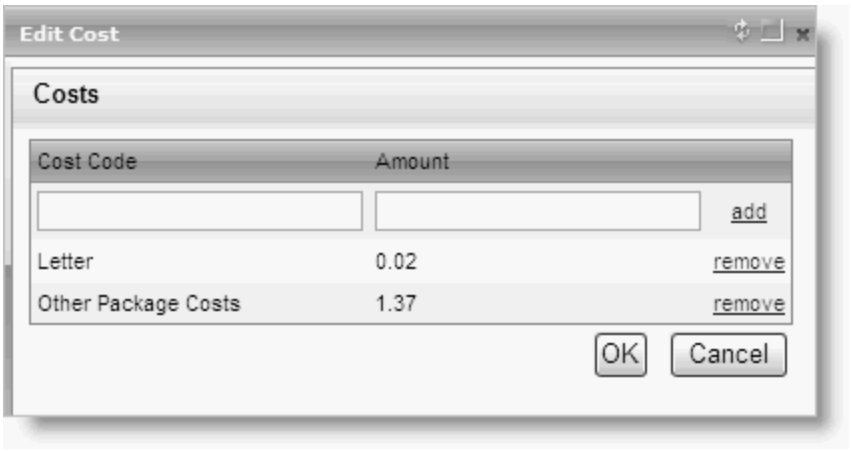


4. Add an additional cost and click Save.

   The overhead cost calculation increases.

   To add cost to an insert

1. Go to Marketing > Inserts.
2. Open an Insert.
3. Click the … button next to Total.
4. Enter a value in the Cost Code and a cost per piece in the Amount.
5. Click add.



6. Click OK to save the values.

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

   Sum of inserts

   Tips

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

About RFM Analytics

RFM Analytics is an analytical tool that provides rankings for your contacts based upon their financial participation with the organization. It is a very commonly used tool for fundraising, but its applications are not limited to the fundraising marketplace. Any organization that targets contacts based on past participation can benefit from RFM Analytics.

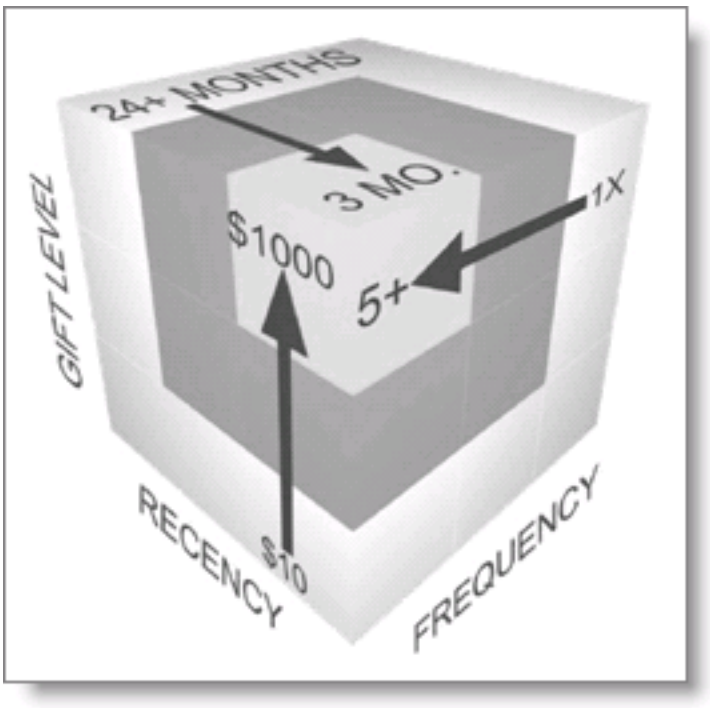
With RFM Analytics, you can:

- Rank and organize your customer population into specific groups manually or automatically.
- Define ranking scores for recency, frequency, monetary, combined (calculated), and total (calculated) values.
- Create groups, such as quintiles, that reflect the relative ranking of customers according to all RFM measurements.

- Analyze transaction patterns to accurately predict future behavior.
- Define different customer population and transaction queries to include in each analysis.

RFM Analytics relies upon three core elements that turn transactional data into a three-dimensional score based on:

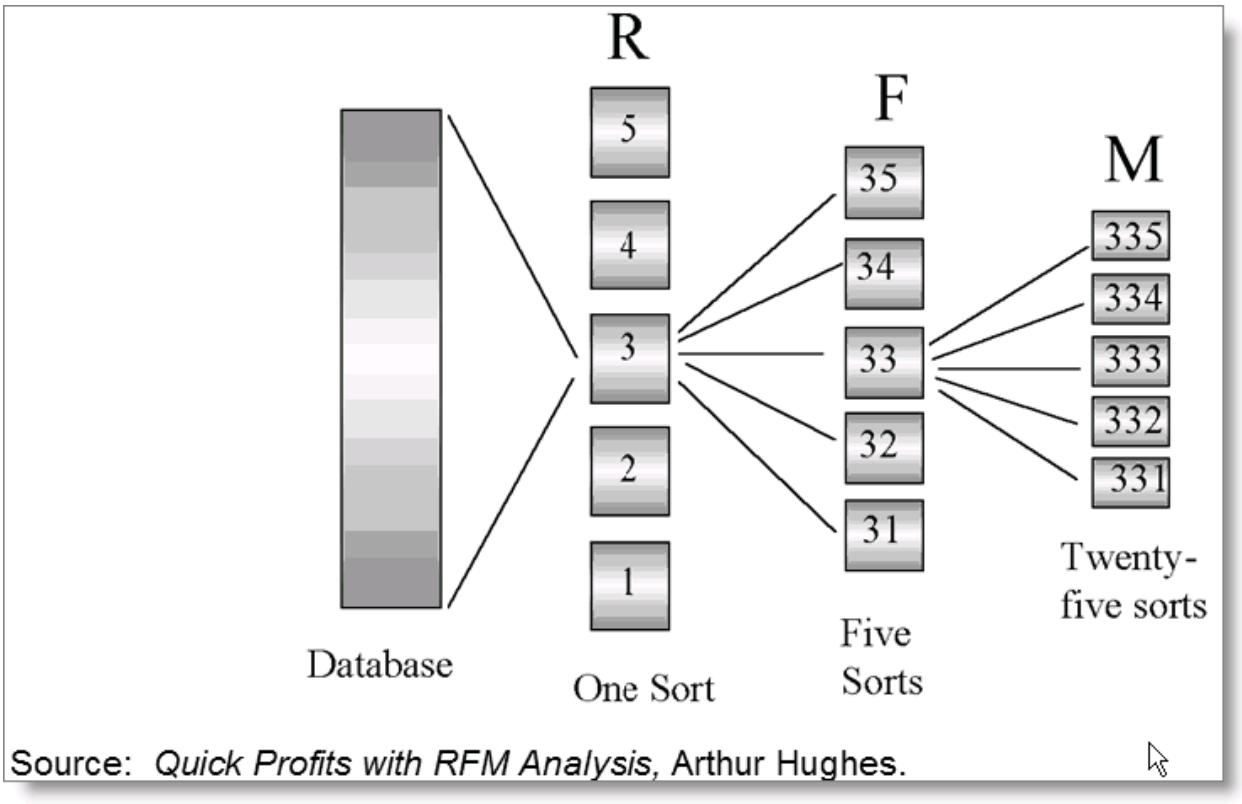
- Recency – How long since the last transaction?
- Frequency – How often does this transaction occur?
- Monetary Value – How much are these transactions worth?



RFM Analytics scoring

Rankings, once run, result in a score being assigned to each record. This score is important because ranks contacts/prospects within a matrix of highest to lowest values.

There are different schools of thought about how to use RFM scores. Some organizations use the total score (1+1+1 = 3). Others use the product of the score (1*1*1 = 1) and others use a concatenation of the scores (111).



Example RFM ranking

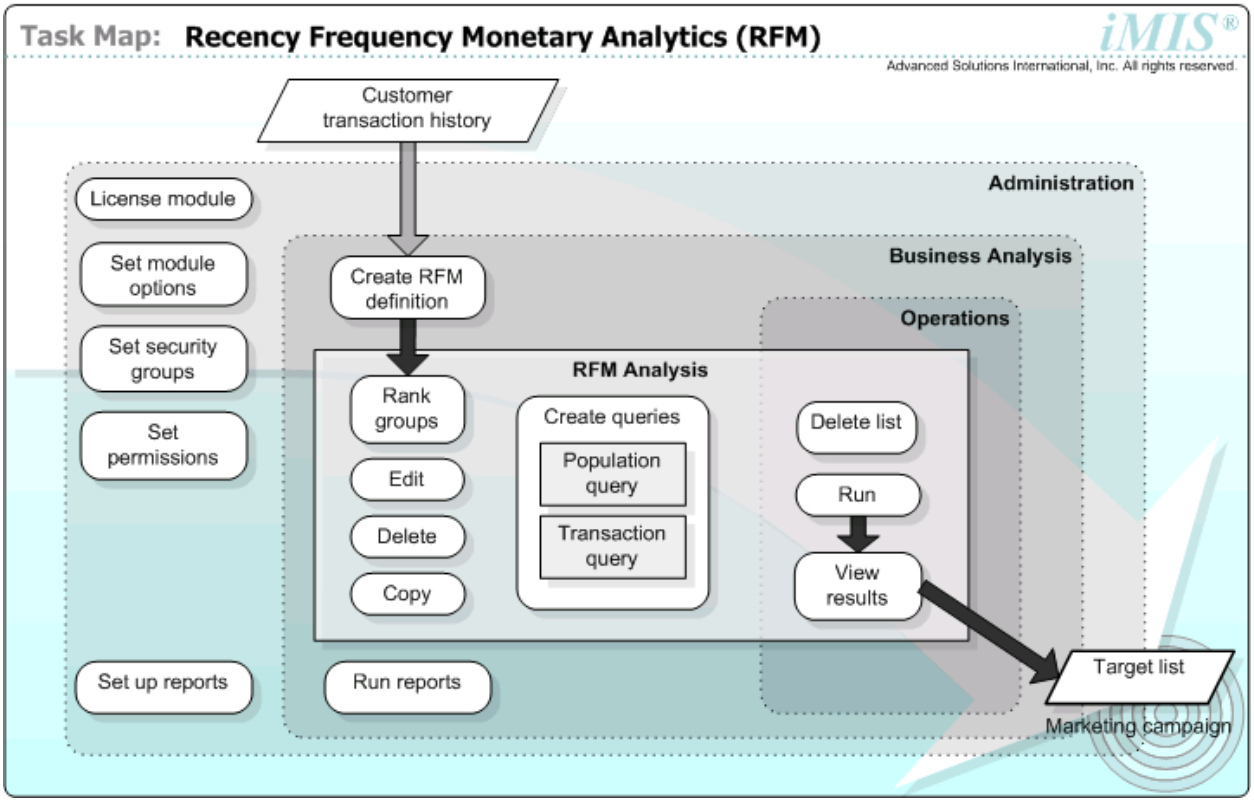
Tips for implementing RFM Analytics

- If you are running an RFM ranking for the first time, the automatic ranking might be able to help establish a first pass at quartiles or quintiles. However, make sure to review the results to see whether these rankings are correct for your organization. There is a danger in using and re-using automatic rankings for target marketing purposes. Automatic rankings will always produce equal buckets rather than telling you who is falling where based on typical transactional behaviors. After determining some basic highs and lows for each category, use the manual ranking to define those buckets and continue to evaluate the results.
- The key to successfully using RFM Analytics in any organization is having the patience to watch how people perform over a long period of time. Remember that anything can impact behavior and do not react immediately to changes. RFM buckets tend to remain stable.

- Build your queries separately. Do not use Save As to copy queries. There may be some unwanted criteria carried over from the original query.
- Make sure the transaction query Includes Quantity, Amount, and Transaction Date. These properties are used for the ranking. You can alias other properties if you wish, such as aliasing Date Received or Effective Date as the Transaction Date.

Task Map: RFM Analytics

This diagram illustrates RFM Analytics core tasks by the approximate order they occur (top-left to bottom-right) and by the organizational area that performs them.



Task Map: RFM Analytics

Example: Interpreting RFM rankings

The following example uses RFM rankings to identify prospects for a specific campaign.

Interpreting recency rankings

In this case, low values correspond to the most recent transactions.

Interpret these rankings as:

- 1 – Received within the last day
- 13 – Received from 2 to 13 days ago
- 25 – Received from 14 to 25 days ago
- 37 – Received from 26 to 37 days ago
- 49 – Received from 38 to 49 days ago
- 61 – Received from 50 to 61 days ago

Interpreting frequency rankings

Interpret these rankings as:

- 1 – Donated once
- 5 – Donated from 2 to 5 times
- 10 – Donated from 6 to 10 times
- 15 – Donated from 11 to 15 times
- 20 – Donated from 16 to 20 times
- 25 – Donated from 21 to 25 times

Interpreting monetary value rankings

Interpret these rankings as:

- 250 – Amount donated is 250 or less
- 500 – Amount donated is 251 to 500
- 750 – Amount donated is 501 to 750
- 1500 – Amount donated is 751 to 1500
- 2000 – Amount donated is 1501 to 2000

- 2500 – Amount donated is 2001 to 2500
- 3000 – Amount donated is 2501 to 3000

Creating RFM analysis definitions

RFM Analytics requires that two queries work together:

- Population query – Determines who will be analyzed
- Transaction query – Determines what will be analyzed (for example, date, quantity, amount)

Tips for creating RFM Analytics definitions

- You can copy and edit existing RFM definitions for efficiency.
- After you define the RFM analysis, you can run it repeatedly to create or update the list of segments generated.

Before you begin

Make sure the population query and transaction query are set up.

To create an analysis definition

1. From Marketing, select RFM Analytics.
2. From the New drop-down list, select RFM Definition.
3. Identify each RFM model with a unique name (duplicate names are allowed).
4. Determine whether ranges should be set automatically or manually:

- When setting ranges automatically, enter a value greater than zero for at least one range.
- When setting ranges manually, specify the Recency, Frequency, and Monetary ranges.

The query is saved to the default RFM Process Engine folder unless specified otherwise.

Ranking groups automatically

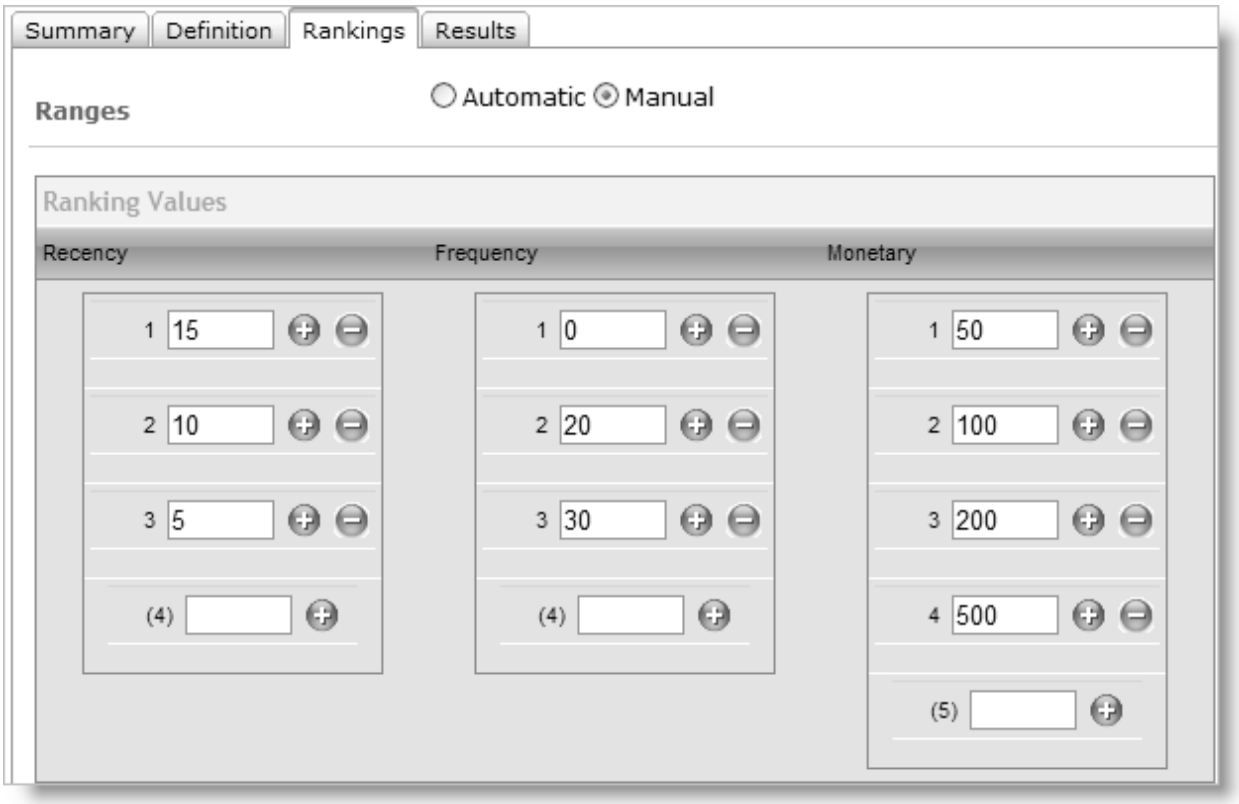
RFM Analytics divides the number of groups specified using the following procedure when groups are ranked automatically:

- Sorts lists based on criteria (Recency, Frequency, and Monetary)
- Divides the population equally into the specified number of groups
- Starts at the top of the list and ranks each contact based on the group
- Creates an equal number of contacts for each group:
- The lowest-numbered group corresponds to the least desirable ranking.
- The highest-numbered group corresponds to the most desirable ranking.
- The last group may contain a different number of contacts than the other groups depending on the population and number of groups.
- Some groups will be empty if the number of contacts is less than the number of groups.
- Two contacts with the same score may be placed in different groups.

Ranking groups manually

When ranking groups manually, you must enter criteria for each ranking group.

> **Note:** Note: When defining your manual rankings, you should use higher numbers for more desirable rankings and lower numbers for less desirable rankings to conform to industry standards for RFM rankings.



Example: Manually ranking RFM values

Recency

The criteria for ranking Recency is based on the last time the individual had contact with the organization. The date used is based on the Transaction Date specified in the Transaction Query. The following example illustrates how Recency is ranked:

- Group 1: >10 days and <=15 days, value = 15
- Group 2: >5 days and <=10 days, value = 10
- Group 3: <=5 days

Frequency

The criteria for ranking Frequency is based on the number of times the individual had contact with the organization. The value is calculated by the number of records for an individual in the Transaction Query. The following example illustrates how Frequency is ranked:

- Group 1: <20 times and >=0 times, value = 0
- Group 2: <30 times and >=20 times, value = 20
- Group 3: <50 times and >=30 times, value = 30
- Group 4: >=50 times, value = 50

Monetary

The criteria for ranking Monetary is based on the amount of money the individual has spent with the organization. The amount is based on the total amount from the Transaction Query. The following example illustrates how Monetary is ranked:

- Group 1: <0 and >=50, value = 50
- Group 2: <50 and >=100, value = 100
- Group 3: <100 and >=200, value = 200
- Group 4: >200 and >=500, value = 500

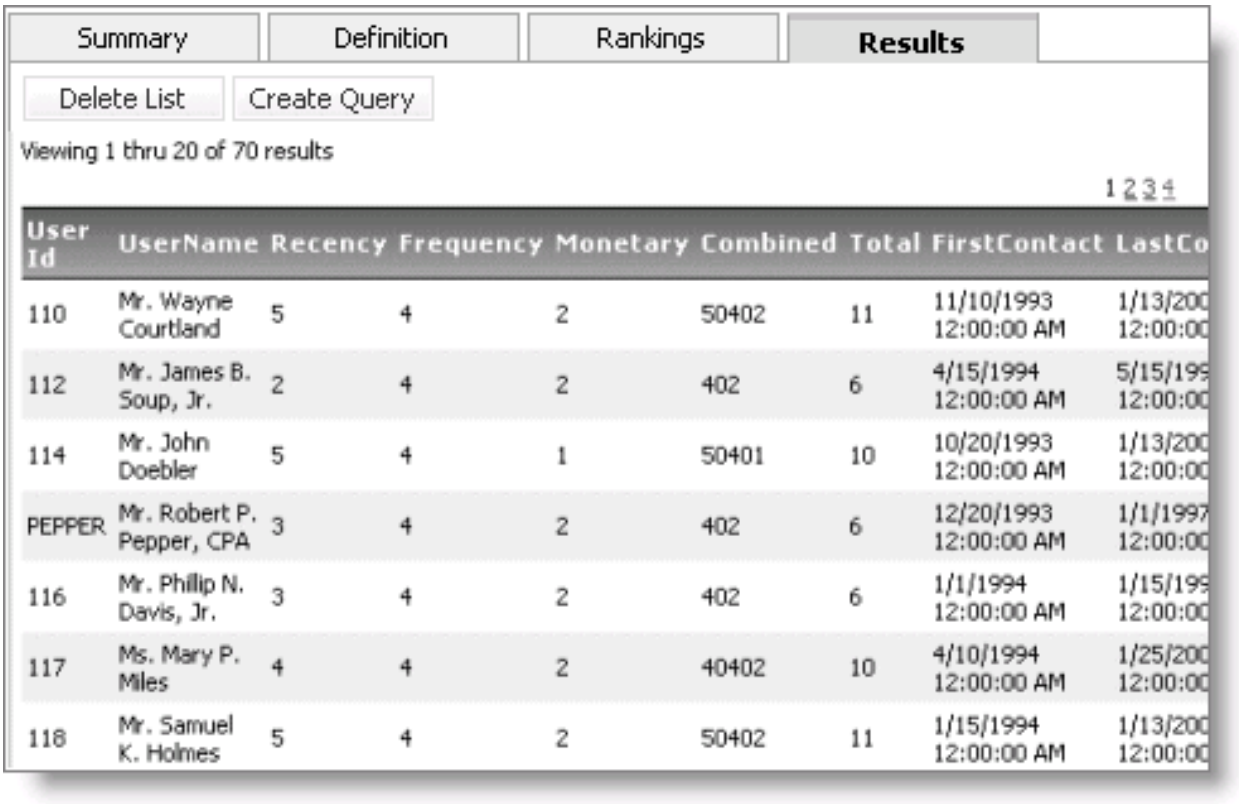
Generating and querying RFM analysis results

To generate and query RFM results

1. From Marketing, select RFM Analytics and open the RFM analysis definition.
2. Click Run.

   A status message displays on the Summary tab. If an error message such as "An error has occurred while generating Lists" appears, click on the message to see more details.
3. View the results on the Results tab.

   Your results may look similar to the following example:



User Id	UserName	Recency	Frequency	Monetary	Combined	Total	FirstContact	LastCo
110	Mr. Wayne Courtland	5	4	2	50402	11	11/10/1993 12:00:00 AM	1/13/200 12:00:00
112	Mr. James B. Soup, Jr.	2	4	2	402	6	4/15/1994 12:00:00 AM	5/15/199 12:00:00
114	Mr. John Doebler	5	4	1	50401	10	10/20/1993 12:00:00 AM	1/13/200 12:00:00
PEPPER	Mr. Robert P. Pepper, CPA	3	4	2	402	6	12/20/1993 12:00:00 AM	1/1/1997 12:00:00
116	Mr. Phillip N. Davis, Jr.	3	4	2	402	6	1/1/1994 12:00:00 AM	1/15/199 12:00:00
117	Ms. Mary P. Miles	4	4	2	40402	10	4/10/1994 12:00:00 AM	1/25/200 12:00:00
118	Mr. Samuel K. Holmes	5	4	2	50402	11	1/15/1994 12:00:00 AM	1/13/200 12:00:00

To query the results of an RFM analysis

1. From Marketing, select RFM Analytics and open the RFM analysis definition.
2. Select contacts from the following RFM criteria:

- Recency ranking
- Frequency ranking
- Monetary ranking
- Combined ranking
- Total ranking
- First amount
- First amount date
- Last amount

- Last amount date
- Highest amount
- Highest amount date

3. To purge the results, select Delete List.
4. To create a query for use in Campaigns, select Create Query.

Using RFM Analytics with Segmentation

RFM rankings can be used as the basis for segmentation. Segmentation assists with targeting the market or the segment of the database who is most likely to respond to the marketing effort. For example, if your marketing department is trying to mail the company contact of their best conference attendees, they might look for:

- Recency going back 5 years
- Frequency of attendance being greater than ten times attending (because this would imply that at least two attendees from that company attended within those 5 years)

  and

- Value = to increments of conference registration because that's the value of their attendance (anyone with a value higher than that might have purchased books at the conference or made a donation above and beyond the registration fee).

  You can use the same ranking model against different groups or populations within your database to be able to make predictions and better target who is most likely to respond to a particular marketing effort. The RFM rankings may look the same, but the numbers within each rank may be quite different.

Example: Creating a fundraising campaign

BWS: Put this here until we decide if we want to separate out fundraising events.

Fundraising events

1. On the Event Function Detail window, check the Fundraising box.

2. Populate the Appeal and Campaign fields with the appropriate appeal and campaign codes after you create the campaign.

3. Enter a source code in the Appeal field.

Note: When you delete an event function after is has been linked to an appeal, the Appeal Product tab displays only the Function Code of the deleted function.

In this example, the campaign manager for the Research Foundation wants to create a fundraising campaign. The Research Foundation, which researches human diseases and develops vaccines, is preparing for its annual Ride for Research fundraising event.

The Ride for Research event is a weekend-long bicycle ride that has been very successful in generating revenue and awareness for the foundation's research. To attract riders for this year's event, the foundation will conduct a direct-mail marketing campaign that targets past and potential riders.

Create the campaign

Define the campaign:

- Name: Ride for Research
- Campaign Code: 05RR
- Description: Our annual series of events that serve as our major outreach and awareness campaign. The series culminates in our annual bicycle ride.
- Campaign Type: Annual
- Status: Active
- Start Date: 03/01/2006
- End Date: 02/27/2007
- Predicted Response Rate: 14.00

Create the direct mail appeal

Define the direct mail appeal:

- Name: Direct Mail Appeal
- Description: Direct mail appeal to attract riders for the Ride for Research event.
- Status: Active
- Start Date: 04/01/2006
- End Date: 04/30/2006
- Predicted Response Rate: 11.00

Create the products monitored by the campaign

When a monitored product (product linked to the campaign at the appeal level) is purchased (or a donation is made), the response management feature of Campaign Management automatically captures the product sale, which then is used for monitoring and measuring the campaign's performance.

In the iMIS Events module, define the event:

- Event Code: 05RR
- Title: 2005 Ride for Research
- Status: A
- Begin Date: 02/26/2006
- End Date: 02/27/2006
- Maximum: 25000
- Fundraising Event: Enabled
- Entity Code: General Fund
- Campaign: 05RR

Define the Event Registration function:

- Function Code: REG
- Title: Event Registration

- Type: REG
- Status: A
- Begin Date: 02/26/2006
- Time: 7:00 AM
- End Date: 02/27/2006
- Time: 5:00 PM
- Description: Registration for the Ride for Research fundraising event.
- Maximum: 25000
- Automatic Option: Enabled
- Fees: 100.00 Regular
- Income Account: General Income

In the iMIS Orders module, create the Product category:

- Category: Product
- Description: Order Products
- Stock Item: Enabled
- Taxable: Enabled

Create the Ride for Research coffee mug product:

- Code: RR-MUG
- Category: Product
- Status: Active
- Title: 2005 Ride for Research Coffee Mug
- Pricing: 8.00 Regular
- Unit of Measure: Each

- Weight: .5
- Stock Item: Enabled
- Taxable: Enabled

Add the products to the direct mail appeal

Assign the monitored products (05RR and RR-MUG) to the campaign's Direct Mail Appeal.

Create the solicitation for riders

The marketing plan is to solicit all Research Foundation members to ride in the Ride for Research event.

Define the Solicitation for Riders:

- Name: Solicitation for Riders
- Description: Core solicitation with specific requests for participating in and sponsoring the Ride for Research event.
- Status: Active
- Reminder Date: 04/09/2006
- Start Date: 04/10/2006
- End Date: 04/17/2006
- Predicted Response Rate: 14.00

Create the source code package for potential riders

This source code package will be sent to all potential riders in the Ride for Research event.

Define the Riders source code:

- Code: Riders
- Description: Package to contacts for riding in the Ride for Research event.

- Status: Active
- Overhead Cost: CC_01 = Cost Code, 500 = Amount
- Predicted Response Rate: 14.00
- Target Revenue: 75000
- Source Code Type: Run Many
- List Member Type: Contact

  Create the source list: All Contacts query

  Create the inserts

  Create the following inserts:

- 10" x 15" envelope
- Brochure
- Business return envelope
- Postage
- Registration form

  Add the inserts to the source code

  Add the following inserts to the Riders source code:

- ENV10X15
- BRCHR
- RTNENV
- POSTAGE
- RegForm

Communications and Reporting

Communications tools help you build messages to be sent to targeted contacts. In addition, you can run reports about a campaign or a portion of a campaign. These messages and reports are considered “output” and can be generated at any of the four campaign levels:

- Campaign
- Appeal
- Solicitation
- Source code

In addition, you can import and export source lists.

Lists with names can be imported into iMIS Acquisition Management. Campaign Management and Segmentation can query this list and generate lists from it. One of the most important considerations is being able to test against different list rentals. Therefore, it is important to have a testing model.

Lists without names can still be tracked in Campaign Management. At the source code level, assign the quantities included in the list rental. Track the list rental/purchase cost at the package level. Remember that the package will be attached to the source code. Different packages have different list costs, so it is important to apply the cost to the package to properly calculate the ROI.

Kill files

Kill files may be prepared to accompany marketing campaigns, particularly acquisition campaigns. To prevent redundancy, an organization should run a de-duping or merge/purge of their house file (the active names) within their iMIS database and the lists that they rent.

If your organization is using these files, prepare both a segmentation job and output file specific to kill files.

Setting up output processes

Output processes are the means to generate collateral for your campaign:

- Word Merge – Print a mail merge document
- Email Merge – Send an email message
- Campaign List Export – Generate a list to be sent to an external vendor for letter shopping or to contacts via listserv
- RFM Analytics – Rank records based on Recency, Frequency and Monetary Value
- Opportunity Process Engine – Generate projects/opportunities based on complex business rules or in response to a campaign.

You can generate output from a campaign, appeal, solicitation or source code. When you generate output from one level, such as an appeal, output for all of the components beneath it generates. For example:

- Appeal – generates output for all solicitations and source codes beneath it
- Solicitation – generates output for all source codes linked to it
- Source Code – generates output for that one source code only

Word merges and campaign list export files are stored inside Campaign Management after running. Use the View Output menu to see the results.

Tips for setting up output processes

- Throughout the Marketing Suite, NetContact is a required business object. Make sure that you include it in all of your queries, regardless of whether they are used as source lists for source codes or as output queries for an output process attached to a source code.
- Use templates for best efficiency. Some templates are designed through third-party packages which integrate with iMIS; for example, Microsoft Word documents, emails, and report files. Most output processes allow you to define and save the template while you

build the process itself.

- Process Manager must be set up before running the opportunity output process.

Business goals

The process for generating output is:

1. Build the campaign structure first and define the source list (query, a previous solicitation, or a segmentation job).
2. Define an insert.
3. Customize the insert template, if necessary, for this specific need.
4. Attach the output process insert to one or more source codes.
5. Generate the output.

Seed lists for campaigns

A seed list is a list of the individuals within your organization concerned with the campaign. Seed lists are often used to confirm the mail date and to distribute samples internally.

Seed lists are often attached to campaigns but usually not to source codes so that the seed list is not included in the return on investment (ROI) calculations.

Queries for output processes

Using queries to generate output

When a process is run independently of Campaign Management, the process uses the query in its definition to determine the set of generated records. When the same process is executed as part of a campaign's output generation process, the set of records is determined by joining the query with the campaign's target list to form a subset of records. If the process's query does not have records in common with the target list, no output will be generated for that source code.

The source that you should use for the query depends on how you will use the output process.You must typically define two separate output processes for marketing inserts because source codes and job segments differentiate between contacts and prospects.

- Job segments are defined as a contact job or as a prospect job.
- Source codes are designated as a contact source codes or as a prospect source code.

  So, to send marketing inserts to both your contacts and your prospects, you would need to create two different inserts:

- One insert must use an output process whose query source is the NetContact business object
- The other insert must use an output process whose query source is the Prospect business object.

> **Note:** Note: You should not use CSContact or CSProspect as the query source for any output process associated with marketing inserts. Use only the NetContact or the Prospect business object as appropriate, depending on the associated source codes and job segments.

Setting up Marketing Suite

Licensing and installing

Follow standard iMIS procedures for licensing and installing Campaign Management.

After installation, you must synchronize responses before other setup tasks. This initializes the database to recognize new product sales only so that the response reporting does not include previous sales.

Setting up security groups for campaigns

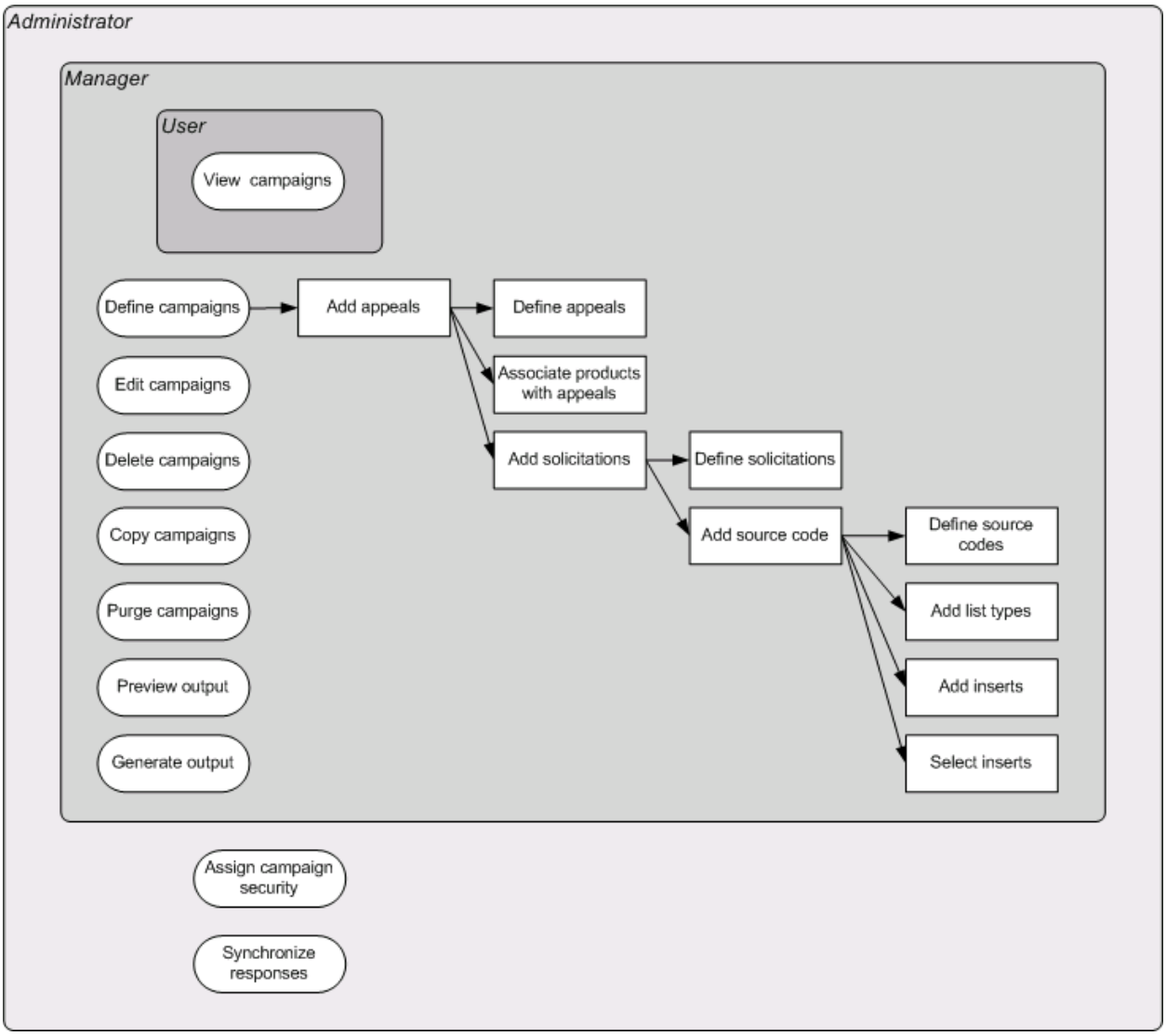
Security groups specify levels of access and control for users. Each user must have a record in the database before you can add them to a security group.

Campaign Management security groups

- CampaignAdmin: Has full control access for all campaigns.
- CampaignMgr: Has read, add, edit, and delete access for the module and read and edit

access for all campaigns.

- CampaignUser: Has read-only access for campaigns.



Campaign tasks by security group

Segmentation security groups

- SegAdmin: Has full control access for all segment setup and segmentation jobs.
- SegMgr: Has read, add, edit, and delete access for all segments and jobs.
- SegUser: Has read-only access for segmentation jobs.

RFM Analytics security groups

- RFMAdmin: Has full control access for RFM Analysis setup and processes.
- RFMMgr: Has read, add, edit, and delete access for all analysis and reports.
- RFMUser: Has read-only access for reports.

To add users to security groups

1. From Marketing, select Set up campaign module > Security Groups tab, or Set up segmentation, or Set up RFM.
2. Select a security group.
3. Under Select New Members, search for and select the additional users.
4. Click Save.

Setting up reports and output processes

iMIS communications tools give you the power to optimize communications within your organization and with outside contacts. By using templates and pre-built reports, your staff can be productive immediately. They can generate reports and email messages, send Microsoft Word letters, and export data to Excel spreadsheets or other analysis tools without detailed knowledge of database structure or report configuration. See Communications and reporting for more information.

Setting up Campaign Management

Set up Campaign Management according to the method your organization uses to track and process data. These options apply to all campaigns. Use the Business Object Designer to track additional information that is important to your organization's marketing success.

Source code ID mode

This setting determines whether source codes will be generated manually or automatically.

- Manually – When enabled, the Manually-Assigned option governs the Set up module page's Source Code Name Format field and the source code Definition tab's Code field:

- The Source Code Name Format field is disabled.
- The Code field is editable until the source code is saved; once saved, the Code field cannot be edited.
- The Code field is blank when first creating a source code.
- You must enter a unique value in the Code field to save a source code.
- Automatically – When enabled, the Auto-Assigned option governs the Set up module page's Source Code Name Format field and the source code Definition tab's Code field:
- The Source Code Name Format field is enabled.
- The Code field is read-only.
- The Code field populates automatically with a unique value when saving a source code.

Tracking costs

You can track campaign costs by appeal or by source code.

Tracking by appeal – If the budget and costs are tracked at the appeal level:

- Total costs display at the campaign and appeal levels only.
- Users can view the Total Cost, Target Revenue, Predicted Response Rate, and ROI for a campaign.
- Users can enter and edit the Overhead Cost, Target Revenue, and Predicted Response Rate for an appeal.
- Users cannot view or edit costs for a solicitation or source code.
- Users can enter costs for an insert, but these costs are ignored in the campaign and appeal cost calculations.

Tracking by source code – If the budget and costs are tracked at the source code level:

- Users can view the Total Cost (estimated or actual), Target Revenue, Predicted Response Rate, and ROI for a campaign, appeal, or solicitation.

- Users can edit the Overhead Cost, Target Revenue, and Predicted Response Rate for a source code.
- Users can view the Total Cost (estimated or actual) for a source code.
- Users can enter costs for inserts, which are used for cost calculations.
- The Summary tab for a campaign, appeal, solicitation, and source code display Estimated Cost until output is generated. After generating output, Actual Cost displays. (For a campaign, appeal, or solicitation, the Summary tab displays the Actual Cost if output has been generated for any child source codes; otherwise, Estimated Cost displays.)
- The Calculate Estimated Costs button displays on the campaign, appeal, solicitation, and source code portfolio pages.

  About auto-map source codes when retrieving responses

  If selected, this setting automatically maps source codes to orders, gifts, and pledges if a source code is not provided when synchronizing responses. The source code is obtained from iMIS Events, Orders, or Fundraising.

  If the setting is not selected, iMIS does not recognize responses if an order, gift, or pledge does not have an associated source code.

  > **Note:** Note: This feature applies only if one or more products are associated with an appeal.

  To set Campaign Management options

1. From Marketing, select Set up campaign module > Options tab.
2. Enable the desired options:

- Choose the Source Code ID Mode: Manually-Assigned or Auto-Assigned.
- If Auto-Assigned is enabled, enter the Source Code Name Format.
- Choose the Budget Level: Appeal or Source Code.
- Check to select Auto-map source codes when retrieving responses.

3. (optional) Enter the Opt Out URL and the Opt Out Key which can be used when editing an email template (see "Defining output processes") for customers who want to be removed from a mailing list.
4. Click Save.

Understanding opt-out configuration

Sometimes people want to be removed from a campaign mailing list. This action is called opting out. Campaign managers want to know the number of people who opt out of a campaign and which source code is related to the opt-out action.

Understanding the tracking of opt-outs helps you analyze the campaign's effectiveness. Opt-outs are tracked from the originating source code so that your campaign manager knows the source code that caused the opt-out action.

Two settings and inserting code into an email template control the opt out configuration:

- Marketing > Set up module > Opt Out Url field points to a special opt out page, such as http://www.domainname.org/iMIS/OptOut.aspx. When the person clicks on the link in the email containing the Opt Out code, they are taken to this page. The page can contain instructions for choosing to be removed from the list, or request further information for why the message caused the email recipient to choose to be removed.
- Marketing > Set up module> Opt Out Key field contains %OPTOUTURL% by default. This field contains the code that you insert into the email template in the HTML code. You could change it to %REMOVEME% or another variable name, but you must be sure to change the code in the email templates that use the Opt Out Key in them.

  When you create an email merge template, use HTML, not plain text, and use %OPTOUTURL% for the URL for the link. For example, add the text, "If you want to be removed from our campaign, click here." Highlight "click here" and insert a link. Enter %OPTOUTURL% as the URL and choose Other as the Type.

  Using this email merge, generate output from a source code. The email messages are generated and sent.

When an email recipient clicks the "click here" link in the campaign email, they go to the URL for the Opt Out Url page configured in iMIS Marketing > Set up module.

If you have more than one source code in one campaign that solicits the same prospect, opting-out for any one source code should opt-out all source codes in the campaign that have solicited that prospect. In addition, iMIS discontinues all further campaign appeals, solicitations, and source codes for that prospect, even those that are created after the opt-out. In short, any future lists automatically exclude that contact from being selected again.

For example, when you look at the Record Responses area and look up an ID, you see every source code the person with that ID is being solicited for. If a member is solicited by two different source codes within the same campaign, they are shown as opted-out of both campaigns.

Solicited and unsolicited responses

The definition of a solicited response is twofold. One definition is an order (product, event, fundraising) or opportunity that has a source code associated with it and the primary contact (or BT_ID) has been solicited for the source code. The other definition is associated with an order that contains no source code but does contain a product that is associated with an appeal and the primary contact (BT_ID) has been solicited for a source code within the appeal. For the second definition to be recognized as a response, automatic source code mapping must be enabled. Opportunities that do not reference a source code are not calculated as a response.

The definition of an unsolicited response is also twofold. One definition is an order (product, event, fundraising) that has a source code associated with it and the primary contact (BT_ID) was not solicited for the course code. The second definition is an order that contains no source code but does contain a product that is associated with an appeal, but the primary contact (BT_ID) has not been solicited for any source codes within the appeal. For the second definition to be recognized as a response, automatic mapping of source codes must be enabled. Auto-mapping of unsolicited responses is not a perfect implementation.

The begin and end dates of the source code, solicitation, appeal, and campaign are ignored when recognizing responses for both explicit or indirect responses. This design means that an order generated past the campaign end date still generates a response to the campaign.

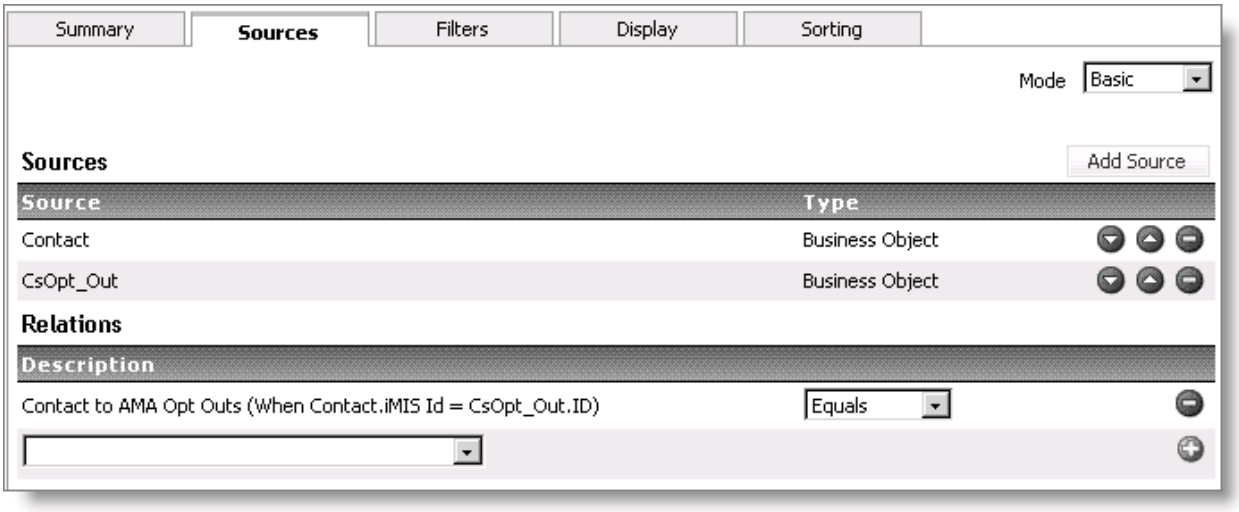
Events and responses

Responses are created as one response per order or event registration. A single event registration for ten contacts would be recorded as a single response.

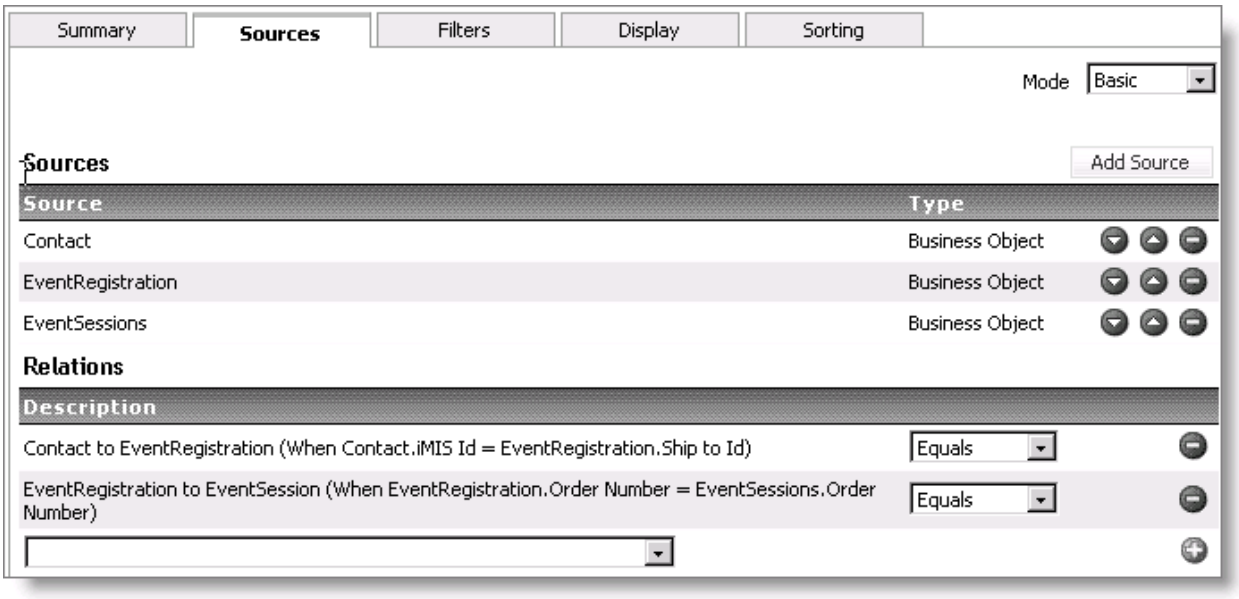
Example: Segmentation queries for RFM analysis

The following example illustrates queries for segmentation and RFM analysis.

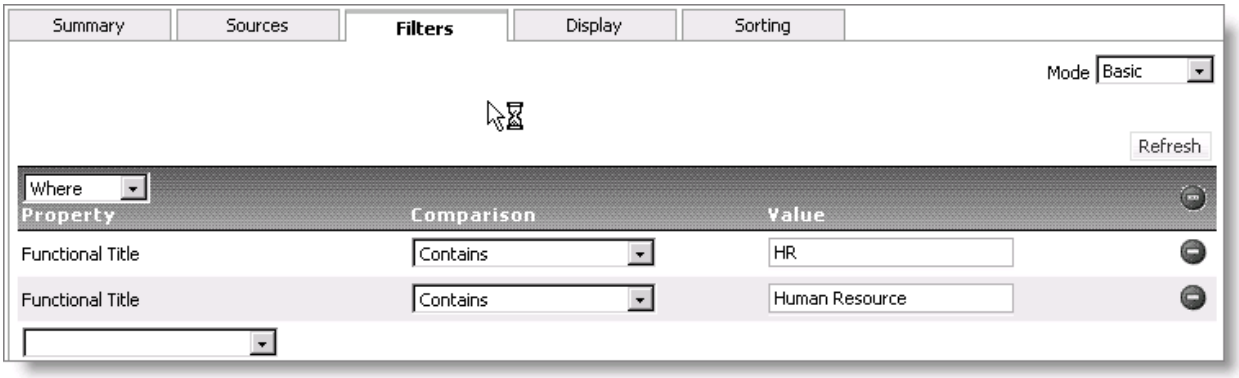
1. In IQA, create the segment queries.
2. Write a query to suppress Opt Out responses. For example:



3. Write the query for a Segment Definition 1. This segment includes anyone who has purchased seminar 6515 this year.



4. Write the query for Segment Definition 2. This segment includes HR Professionals.

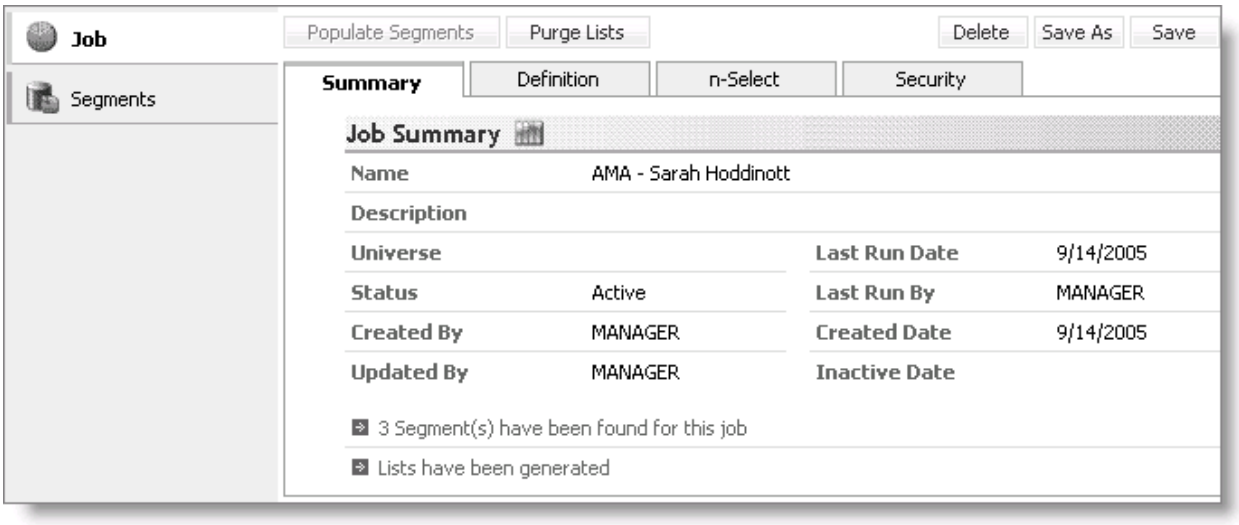


5. Create the job. The job is a container for all of the segments to be run.

- Create the first segment: Suppress query - Catalog opt outs
- Add the remaining segments.

6. Populate the segments.

   Your results page may look like the following example:


Job
Segments
Populate Segments
Purge Lists
Delete
Save As
Save
Summary
Definition
n-Select
Security
Job Summary
Name
AMA - Sarah Hoddinott
Description
Universe
Last Run Date
9/14/2005
Status
Active
Last Run By
MANAGER
Created By
MANAGER
Created Date
9/14/2005
Updated By
MANAGER
Inactive Date
3 Segment(s) have been found for this job
Lists have been generated

New Features

iMIS 20 EMS

iMIS 20 is an Engagement Management System (EMS) that enables organizations to engage members, donors, and other constituents – as well as staff – anytime, anywhere, and from any device. It includes constituent management, constituent self-service, online fundraising, social engagement, private communities, mobile access, and website management in one seamless cloud-based system.

Advanced Solutions International, Inc. is pleased to announce the release of iMIS 20. This section offers an overview of the exciting developments iMIS customers have come to expect with every new product release.

With iMIS 20, ASI added to the strengths of iMIS 15.2 by making improvements – creating enhancements – offering new expansions – and developing exciting, first-time features.

To our iMIS 15.2 customers, and organizations new to the world of iMIS, welcome to the power of iMIS 20!

Engagement is paramount: iMIS 20 breaks ground as the premier Engagement Management System with deep functionality — including Fundraising, CRM|topic=Managing Contacts and relationships, Events, Communities|topic=Community, and International Commerce – spanning a record number of cloud-based interfaces and devices.

No more missed connections: iMIS 20 is a complete site-building platform, making it possible for organizations to support staff in the way they need to work – and to reach

constituents in the way they want to connect. With Give Now, Renew Now and Join Now, Promotions and Discounts, Mobile sites|topic=RiSE Starter websites, cloud-based Event registration – and ASI's continuing attention to accessibility needs|topic=UltraWave and Universal Design – engagement with iMIS 20 is for today's organizations.

The strength of RiSE: Powering all of these sites, the iMIS RiSE|topic=What is RiSE? platform combines a full-featured web content management system with a gallery of site-building web parts (iParts|topic=iPart Reference), letting you construct robust and easily upgradable sites.

With RiSE Tools, you can create queries, reports, business objects, workflow, and content tags. In addition, with the exciting benefit of no programming or hand customization requirements, you control the elements that make for dynamic and engaging user interfaces.

Think of it as your control panel: iMIS Administrative Console, with its table view and big-button functionality, offers a streamlined interface for staff to perform day-to-day and occasional activities for organizations in the areas of Home|topic=Administrative Home, Accounting|topic=Accounting Console, Configure|topic=Configure Console, Continuum|topic=Continuum Console, Tools|topic=Tools Console, and System Admin|topic=System Admin Console.

Enhancements in iMIS 20

This release includes enhancements you will find throughout iMIS. For information and guidelines on upgrading to iMIS 20 from your current iMIS version, see Preparing to upgrade.

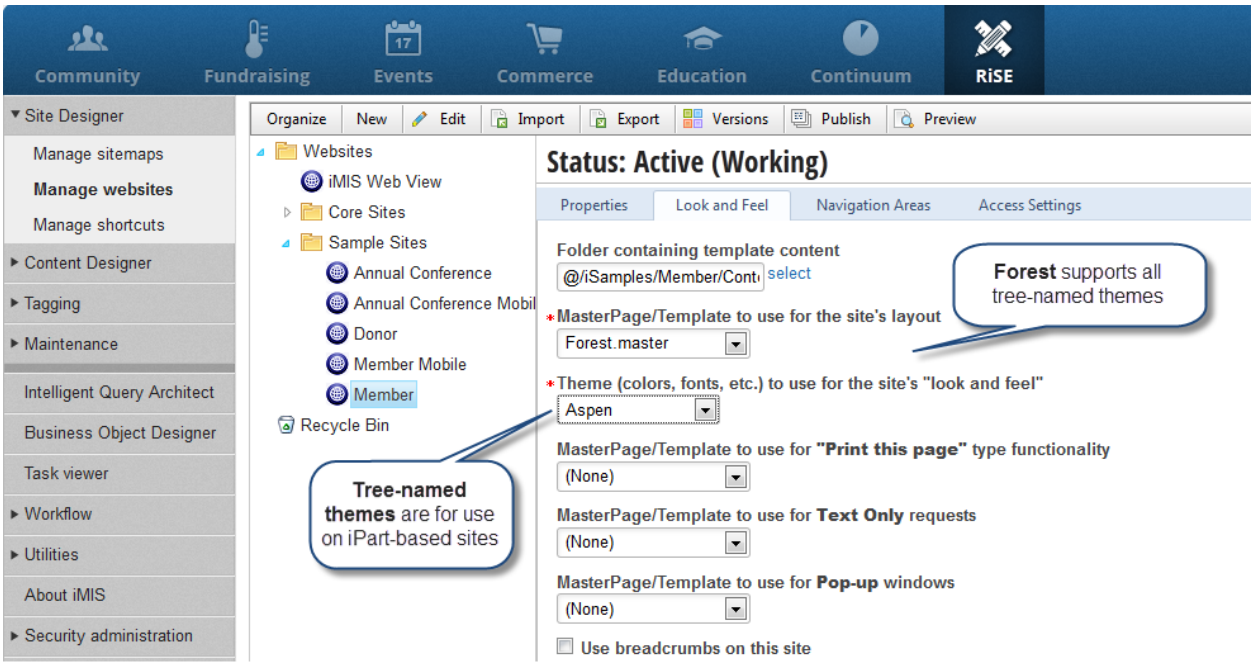
Website management

Staff site – This out of the box iMIS site offers your staff members an easy, convenient way to manage your organization's business directly from a browser. Staff can add contacts, update contact information and complete transactions for members helping them renew their membership, register for events, purchase items from your online store, and more. Using the powerful security features of iMIS, you can control which areas and content that staff can access. The Staff site also includes the powerful RiSE platform for website management.

Note: Note: Only Full and casual users have access to the Staff site. This is determined through licensing. The Staff site is active and ready for your organization to use out of the box. For more information on customizable sample sites, see Working with iMIS sites.

The RiSE platform

Website management- the process of configuring and maintaining the appearance, navigation structure, and content authoring environment of your iMIS websites – is made easier by the powerful tools in RiSE. RiSE features:



- Dynamic website templates and themes for quickly launching new web and microsites
- Non-technical users editing page content with a browser-based editing tool
- Managing multiple websites and allowing chapters or affiliates to manage their own websites
- Creating content once and sharing it across multiple websites
- Assigning and managing content management responsibility to individuals or groups within your organization
- Categorizing content and allow users to identify areas of interest using your organization's unique terms, audiences, and/or concepts
- Your organization's specific terms, audiences, and/or concepts – as well as contact, demographic, and transactional data from within your iMIS database – to deliver targeted web content to your constituents

- Allowing keyword searches to be targeted according to your organization's terms, audiences, and/or concepts

Content Gallery

A gallery of sophisticated, easy-to-use tools to customize existing iMIS self-service pages; as well as create entirely new personalized web pages to meet the ever-changing demands of your constituents — with no programming necessary:

- Allow your constituents to share products, events, fundraising campaigns, and content from your website to popular social media sites
- Add a targeted promotion to constituent profile pages
- Show the real-time progress of your latest fundraising initiative right on the donations page
- Provide real-time data about your membership base
- Free your organization from inflexible e-commerce solutions or costly programming

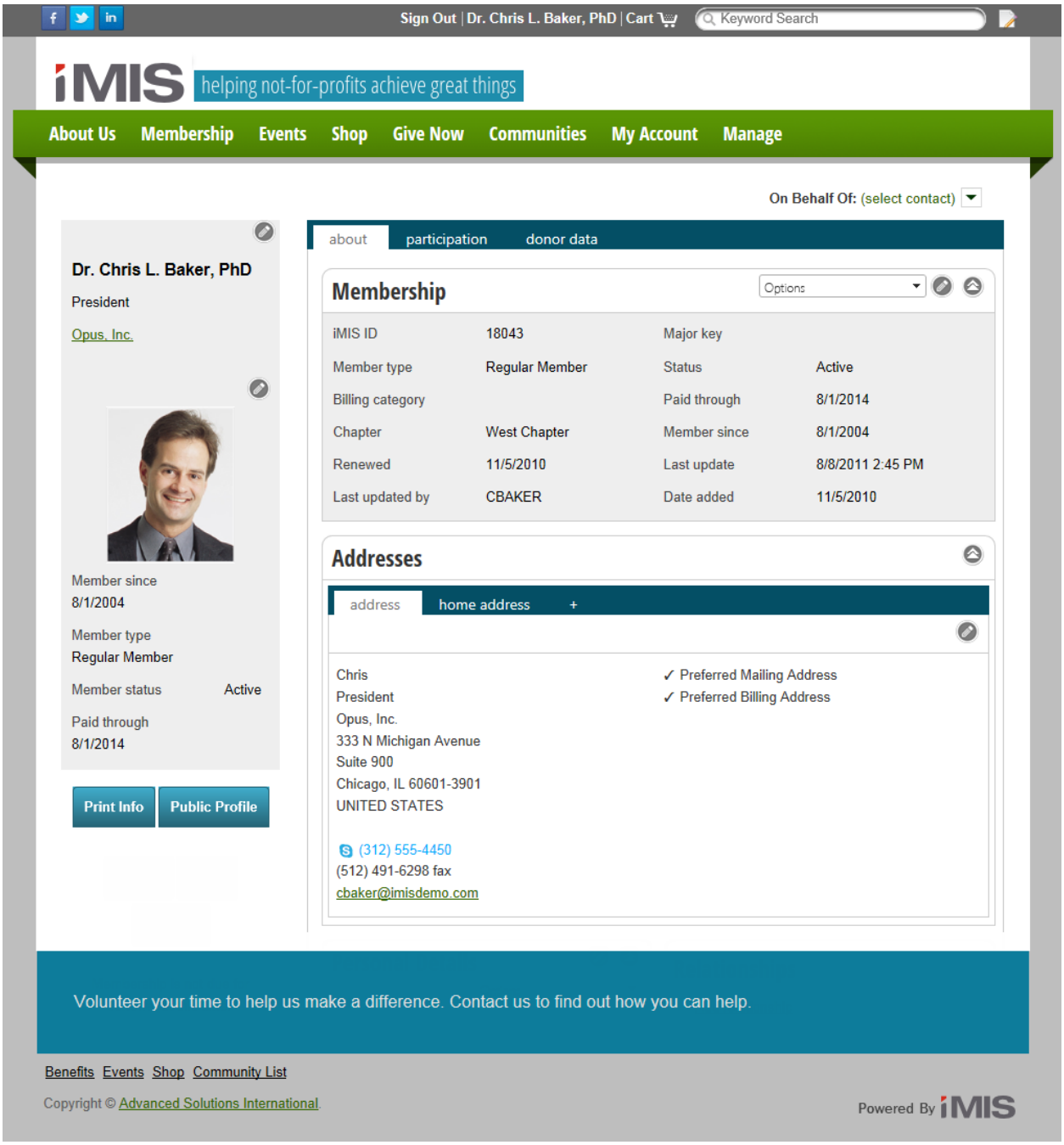
Dynamic RiSE Quick Start websites|topic=Working with iMIS sites are included with iMIS 20:

Sample sites are out-of-the-box iMIS websites that can be easily copied in order to create customized sites for an organization. Sample sites demonstrate some of the more complex enhancements in iMIS. These sample sites showcase new iParts, functionality, and UI improvements as they become available. These sites include the following:

- Member
- Member Mobile
- Donor
- Annual Conference
- Annual Conference Mobile

> **Note:** Note: By default, the starter sample sites are marked as Inactive. If you want to use a sample site, copy the site and enable the Is this website active option (RiSE > Manage websites click the expand icon in the Status area).

Member site – offers a rich experience for self-service by your organization members and prospects. Choose themes, change the navigation in a few clicks, and add any number of iParts to present dynamic information to your visitors.

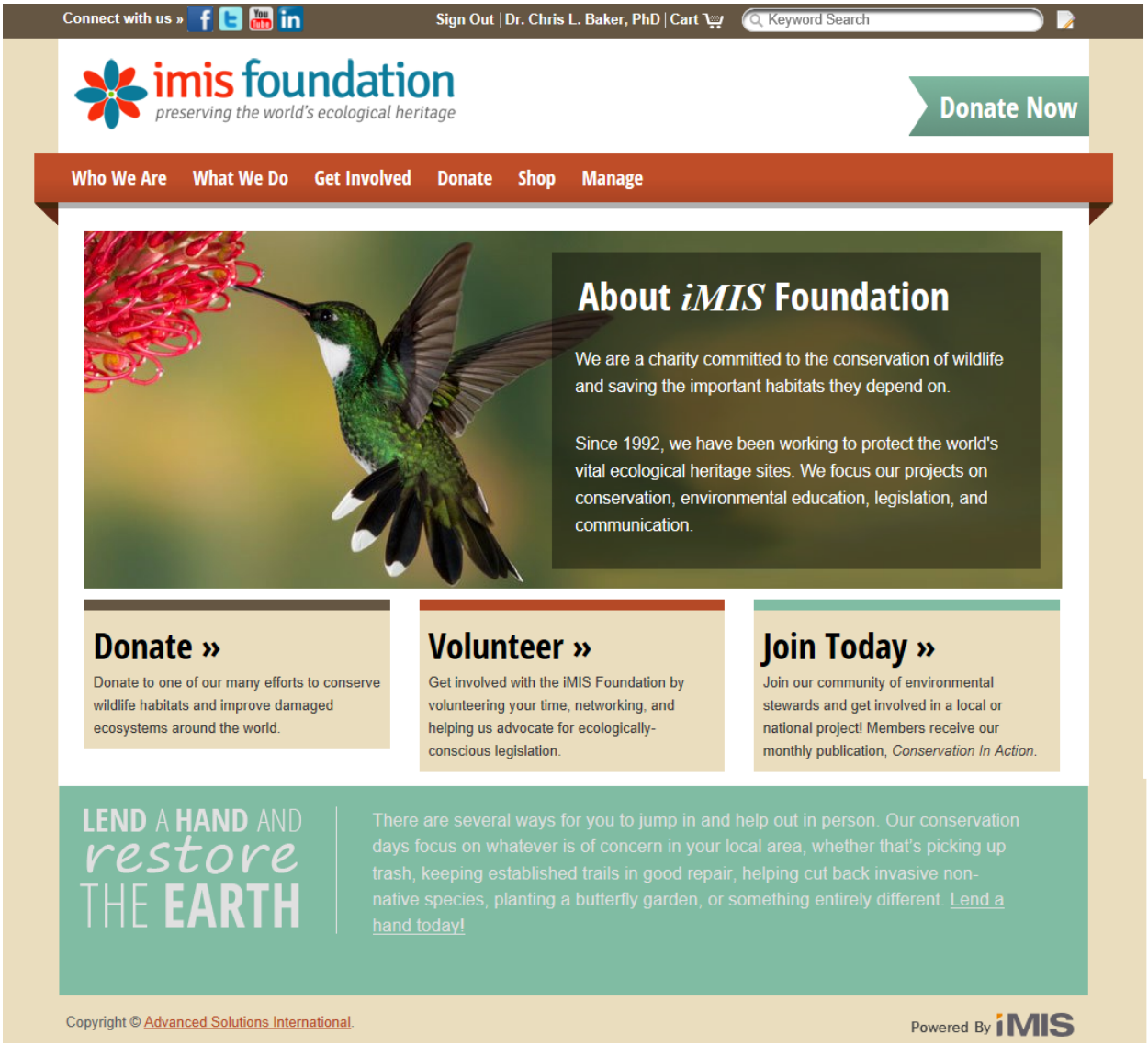


Member Mobile site – renders the Member site in format and behavior that is optimized for use on smart phones and tablets, both by your organization members and by your staff who are working off-site or on the run.

Upcoming Spring Conference

Don't miss out on this year's annual spring conference! The program includes plenty of networking opportunities, workshops to sharpen your skills and sessions to keep you up-to-date with the latest technological advances.
To register for this and other upcoming events click on the events link below.

Donor site – offers a rich and changeable experience for fundraisers conducting charitable campaigns and product sales with the public.



Annual Conference site – offers a "microsite" experience to support your critical projects, such as an organization's annual conference. By shaping the site with its own content and structure, you can maximize the impact of the project without affecting your main site or micro sites from different years. At the same time, iMIS lets you share content among your sites painlessly.

Annual Conference Mobile site – renders the Annual Conference site in format and behavior optimized for use on smart phones and tables, both by your organization members and staff who are attending events. Attendees gain quick access to their personalized programs, activities, and event feeds – and can instantly look up directory profiles of those attending with them.

AT&T
1:19 PM
iMIS
Cart
Annual Conference
The Annual Conference is fast-approaching. Don't miss out – register today!
October 30 - November 1
Cairns, Australia
Learn More
HOME
NEWS

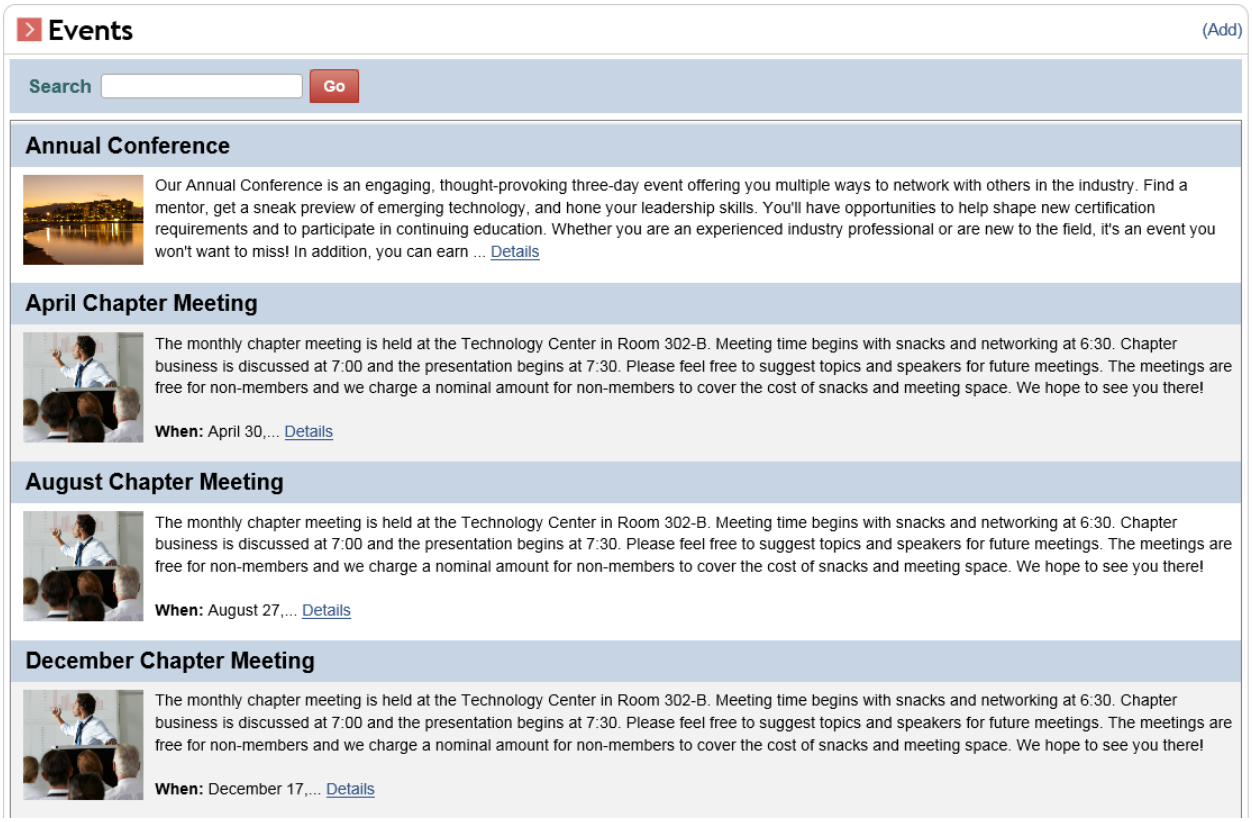
iMIS

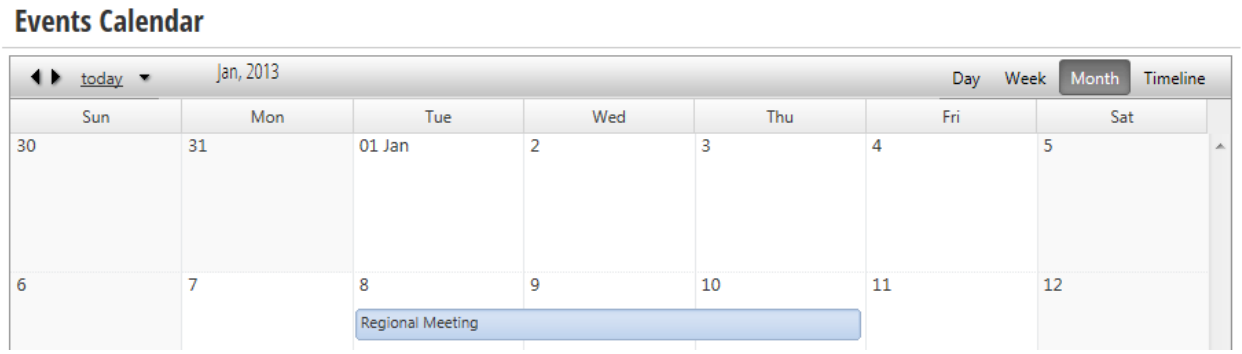
Events on the web

Define and edit events and program items

With iMIS 20, organizations can define and edit events and program items|topic=Creating and managing events on the web, making them readily accessible to constituents for registrations. Your events and program items are viewable by list or calendar, and constituents can easily register for multiple program items at one time. Events, program items, and products that complement your event (such as publications) can be purchased through a clear, industry-standard shopping process.

For more information, see Events.





Avoiding conflicting program items

In iMIS 20, event registrants receive a conflict message in both the event showcase and the cart if a program item they are trying to add to their itinerary conflicts with an already selected program item. Removing one of the program items resolves the conflict.

Change program item registrations after check out

If ‘Allow itinerary changes after checkout’|topic=Enabling ‘Allow itinerary changes after checkout’ is enabled, self-service registrants can change their program item registrations|topic=Registering for events after completion of the registration process.

Note: Note: a handful of exceptions require Administrative Console|topic=iMIS Administrative Console or Desktop|topic=iMIS Desktop.

Look and feel improvements

Communities

Authenticated users now see an improved home page highlighting recent activity, announcements, and other information related to their communities of interest. Communities, chapters, and committees that members are associated with are easily identifiable.

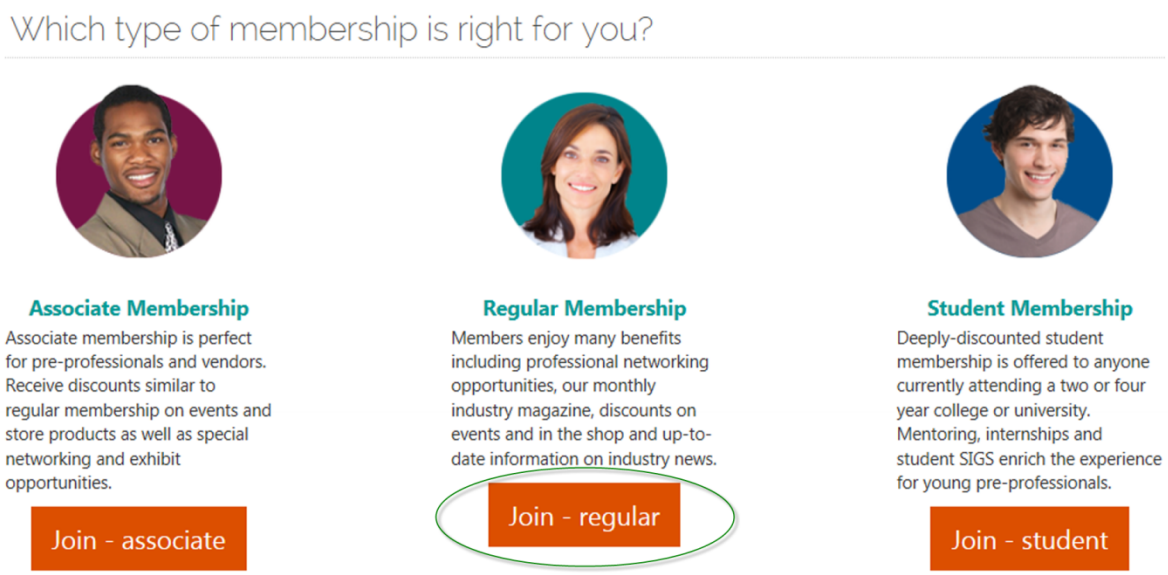
The Community template now features a more usable landing page that includes updated verbiage conforming to standard social media terms, as well as a dedicated library page for documents and resources. Users can conveniently follow the community by clicking on the large Follow Community button.

Store shortcut

A new All Sites Store shortcut has been added to the out-of-the-box Product Display, Gift Display, and Cart content records that use the Continue Shopping button. Just be sure to update the All Sites Store shortcut to point to your shopping content record.

Join and Donate Now

Highly visible Join and Donate Now|topic=Billing for membership dues button options make supporting your organization a true convenience for your constituents.



Matching pair

With iMIS 20, the iMIS Administrative Console theme coordinates with the Staff site theme, creating continuity for organization staff using both parts of the product.

Themes|topic=Sample themes and master pages

A new mobile-compatible theme, Austin_ Mobile, has been created to coordinate with the current Austin_ Member site theme.

To improve usability of the Aspen_ Mobile theme on smart phones, the height of text and dropdown fields have been increased for easier clicking and navigation.

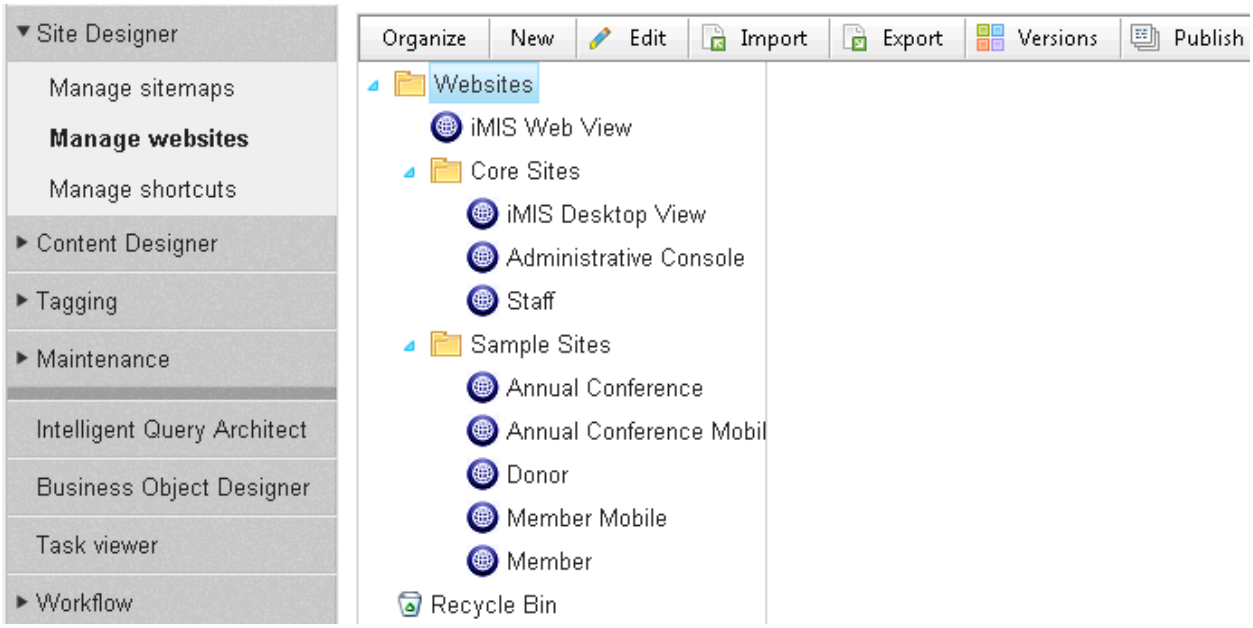
Data and structure changes

iMIS Content Designer and Site Designer folder structure

Standard iMIS content records are now conveniently organized into two folders: Core Content and Sample Sites. As a protective feature, these content records are non-modifiable. This prevents content overwrites by future iMIS upgrades. Another helpful security feature: the default Document System permissions for the Core Content and Sample sites folders permit editing by SysAdmins only.

The Manage Websites utility organizes websites into folders that makes their meaning apparent. You can easily copy a sample website and manage your organization's sites

outside of these folders, including changing, copying, and implementing customizations – all safe from overwriting during upgrades.



Multiple addresses|topic=Address_Purpose (Validation)

Users can now create multiple addresses for each custom address purpose defined in the ADDRESS_PURPOSE General Validation/Lookup table.

Install web servers – 64 bit app pools by default on machines running 64-bit

All new installs use 64-bit app-pools, when 64-bit OS is detected and upgrades convert 32-bit to 64-bit app pools. Manual steps|topic=Running Crystal Reports in 32-bit mode for reverting to 32-bit are documented (for Crystal Reports).

Documentation for extending iMIS SOA

Sample code and documentation has been written to show how to write a new SOA module. Third-parties can now write their own SOA modules, to fill in any feature gaps clients may need.

Context menus

To make the iMIS experience more convenient and intuitive, support has been improved so that context (right-click) menus can now be enabled across all browser-based views.

Contacts added to common search results

Contacts have been added to (common) search results for staff users. After an upgrade or new installation, the initial publishing and indexing of contacts may take some time to complete. Be sure there is ample disk space for the contact files (275,000 contacts = 1 GB, 2 million contacts = 7.5 GB). Contacts search can be turned off by removing the 'publish helper' entry from the Publishing Service config file.

Communities posts added to common search results

Posts in communities have been added to (common) search results for all users. To remove these from the search, stop the publishing service, delete the entire Lucene index folder, and remove the 'publish helper' entry from the Publishing Service config file. Then, restart the publishing service.

Guided Performance Scorecard

The new Guided Performance Scorecard (GPS) is a tool that lets organizations measure their performance by Key Performance Indicators (KPIs) and other important indexes. GPS is also powerful in showing an organization's progress in reaching internal goals, as well as measuring against other industry-leading organizations.

Business Objects removed

The Name_Staff and Name_FR business objects were removed. If you are using these business objects|topic=Working with Business Object Designer in a query or report, you should update and replace them with the CsName_Staff and CsName_FR business objects.

iPart enhancements

Donation Creator –allows a pre-defined value array for gifts

By default, the Donation Creator iPart displays an empty gift amount field for users to enter the amount they want to donate. Organizations can set this up to display other gift amount formats, including a pre-defined array of gift amounts from which the user can choose.

Related Items – display a list of profile or product pictures based on the results of an IQA query

With the Related Items iPart, you can display a list of profile or product pictures based on the results of an IQA query. For example, you can write a query to display the profile pictures of everyone who has registered for an event, made a donation, ordered a particular product, or to display similar products.

Data Showcase –create compelling HTML by leveraging iMIS data

The Content HTML iPart lets you leverage HTML to create compelling designs; the Data Showcase iPart lets you combine this power with variables that merge in your iMIS data, dynamically and reusably.

General Product Display – ability to check out with a Join Now product in the cart

The General Product Display iPart now displays Join Now billing products, and guests can check out with a Join Now product in the cart. Their selection appears in the cart in the same manner as commerce items and event registrations.

When guests check out, subscription records synchronized to the same membership term dates are created and the customer type changes to the customer type selected in the billing cycle. If guests choose to make a payment instead of using Bill Me, the paid thru status of the subscriptions will be updated when the batch containing the payments is posted.

Join Now functionality is currently implemented for cash-based accounting only. Using Join Now with an accrual dues system will still work, but iMIS will treat the dues as cash. Future renewal billings will be treated as accrual dues. Also, Join Now does not currently support Chapter joins.

Item Creator – add and edit items directly

The Item Creator iPart enables users to add and edit commerce items directly on the Staff and Member websites.

Report Display – uses RDL templates to display SSRS reports

The new Report Display iPart displays an SSRS report using an RDL template stored in the iMIS Document System. This differs from the SSRS Report iPart, which requires you to begin with an IQA source query and requires an SSRS runtime object. The Report display iPart lets you create reports outside of iMIS – or pull in already-existing reports by simply adding an RDL to the Document System.

Address Mapper – displays addresses in Google Maps

The new Address Mapper iPart displays a physical address in Google Maps. A "show map" link displays below the address, enabling users to click and see the location in a Google Map popup window. In addition, the Contact Address Editor iPart now includes a configuration option allowing you to enable the display of a Google Maps link for an address.

Change Logon Password – usability improvement for users

The user interface for the Change Logon Password iPart has been improved to include a popup window for users, rather than a tooltip.

Payment Creator – checks available as a payment method

Checks can now be used as a payment method in the Payment Creator iPart. A cash account can be set up in the Administrative console to represent a check payment, and it will now appear as a payment method in the iPart.

Panel Editor – for maintaining social networking links

A new panel with iMIS 20 lets you maintain social networking links for contact accounts, as easily as you maintain other demographic information. You can use the Panel Editor to place this panel, named SocialNetworkLinks, on any record where you want to include a selected contact's social media IDs, such as Facebook and Twitter.

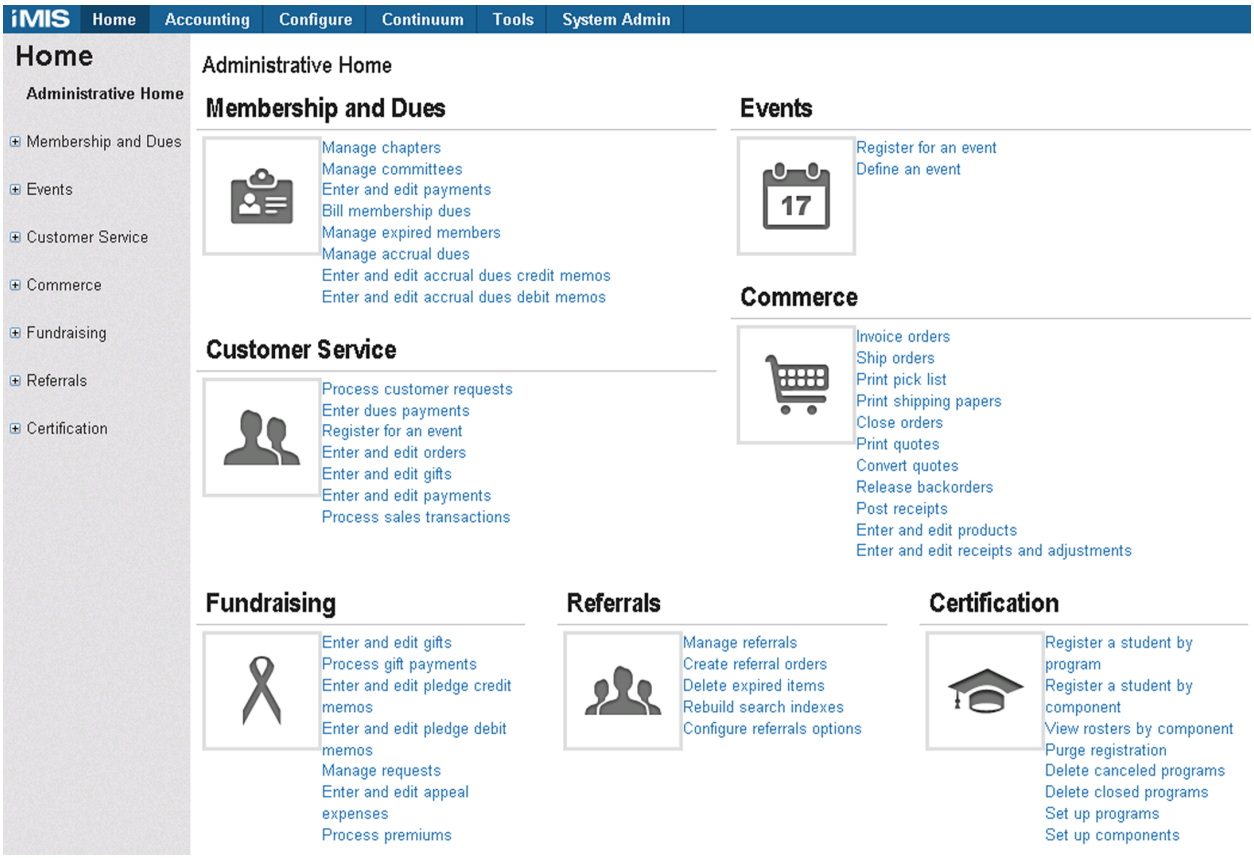
Promotion Manager and Promotion Creator – tools that allow organizations to create promotions

The Promotion Creator iPart creates and manages promotions that grant a percentage discount to an entire order, within any date restrictions that you define. Promotion Creator

provides the discount codes that the Promotion Manager iPart accepts and validates in the cart during checkout. These promotional discounts are now supported for all event registrations, in addition to product orders.

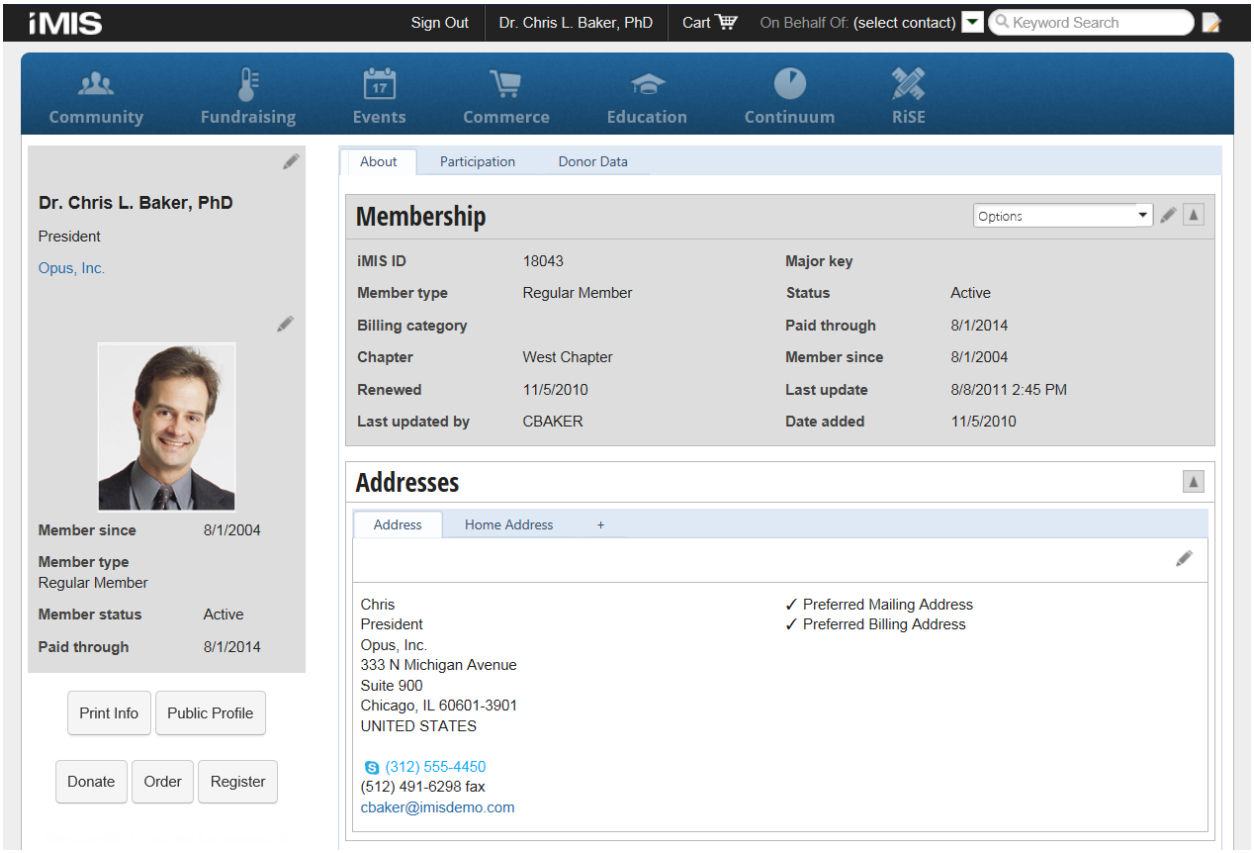
New iMIS Administrative Console

The iMIS Administrative Console is a streamlined, easy-to-use interface for most iMIS setup and management functions. If complex setup is required, the traditional iMIS Desktop continues to support the depth of back office iMIS functionality.



New to iMIS?

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



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

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

Where to go next

Resources and Hints

Documentation and Help

Current live documentation for iMIS is available as both online content and printer-ready downloads.

Server-based Help

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

Live updates to Help and documentation

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

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

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

Streamlined manuals by view

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

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

Friendly and active worldwide customer support.

iMIS gives it users access to some of the best customer|topic=Customer Support and technical|topic=Technical Support support in the industry.

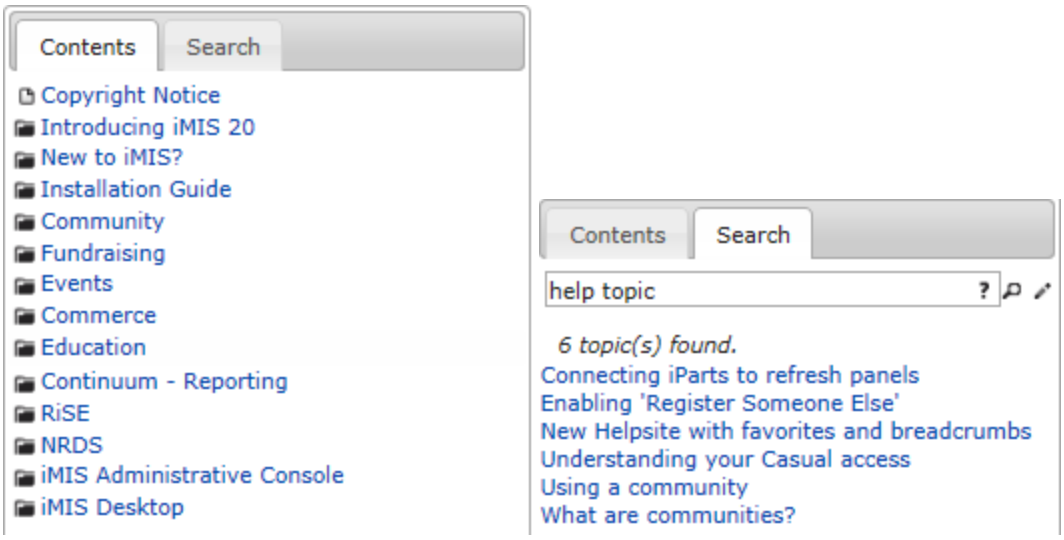
The Helpsite at a Glance

The iMIS 20 Helpsite is designed to give staff users an easy-to-understand overview of the iMIS system and its features and provide a helpful how-to guide for its many varied functions and tools.

This Helpsite combines module-specific, standalone help files all within one easy to use system. The site is organized by folders according to topic. This makes locating information on any topic quick and simple. The contents are arranged according to subject, and are divided into sub-categories of related information. If you would prefer to search for a specific topic directly, the Helpsite Search feature reveals useful topics related to your search.

Note: To optimize your search results, eliminate articles (a, an, the), and remove the spaces between words. For example, if you are interested in learning how to create a site, type in “creatingsite.”

The contents of the iMIS 20 Helpsite represent the latest iMIS documentation. These topics are updated in real time as additions to the program are made.



iMIS is a rich and diverse software program. To aid users in learning the language of iMIS, the Helpsite contains a glossary of Terms and Concepts in i20.

To report problems or concerns with specific topics, please see our Customer Support page, Technical Support page, or visit our website.

Documentation conventions

The instructions in iMIS documentation follow these conventions:

- Boldface: An on-screen menu, option, window title, or other element that you should locate or select.
- Keyname: Which keyboard key (such as Enter) to press.
- Key+Key: Which two keyboard keys (such as Ctrl+L) to press at the same time (press and hold down the first while pressing the second).
- Menu > Item: Which menu and then which submenu item to select.
- Quotation marks (“ ”) and typewriter font: Specific text to enter at the keyboard. Do not enter the quotation marks.
- A blue bar provides the navigation to a particular location. For example:

  Go to RiSE > Site Designer > Manage Sitemaps:

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

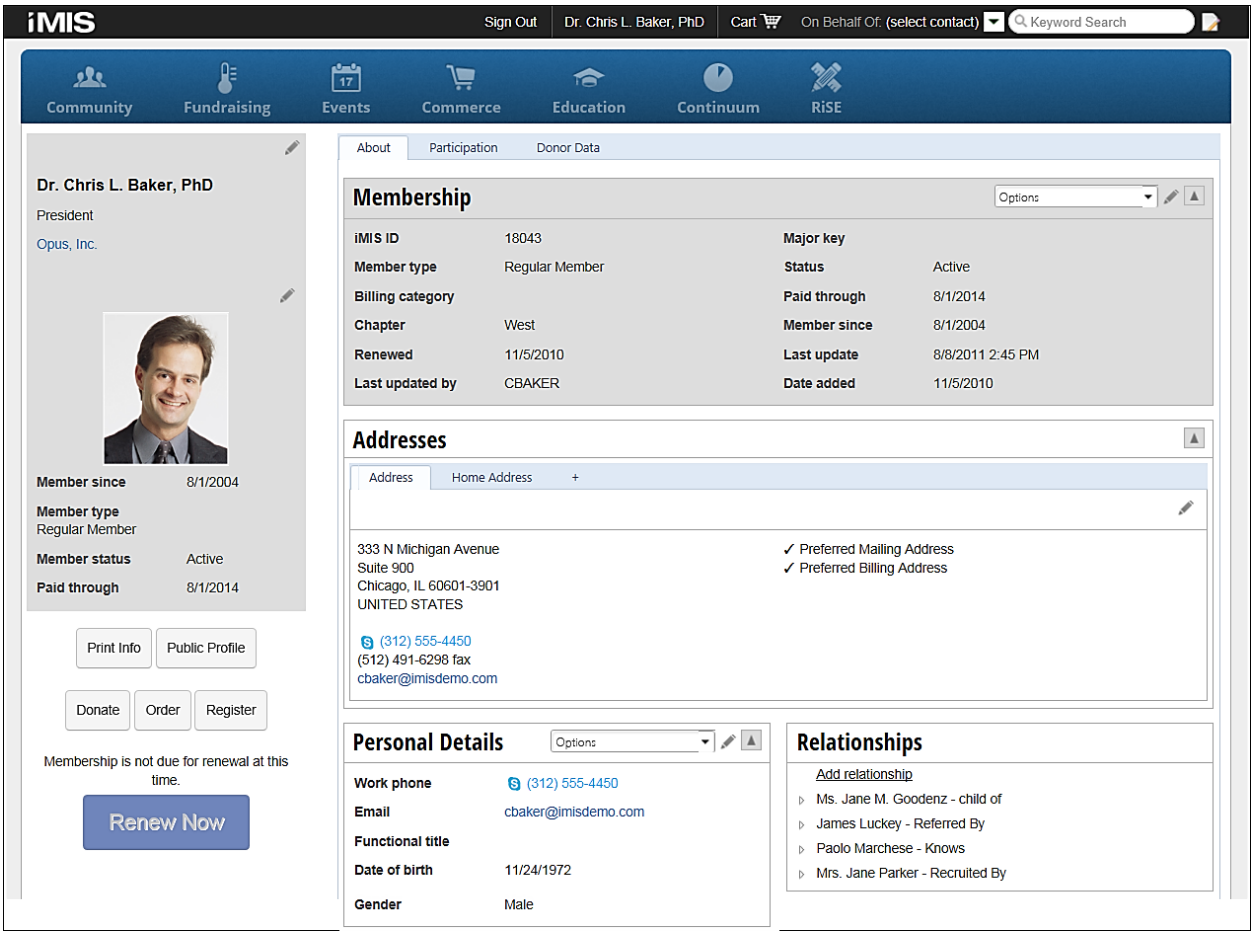
Understanding iMIS sites

There are a variety of ways to interact with and manage iMIS. These each come from one of the diverse out-of-the box sites.

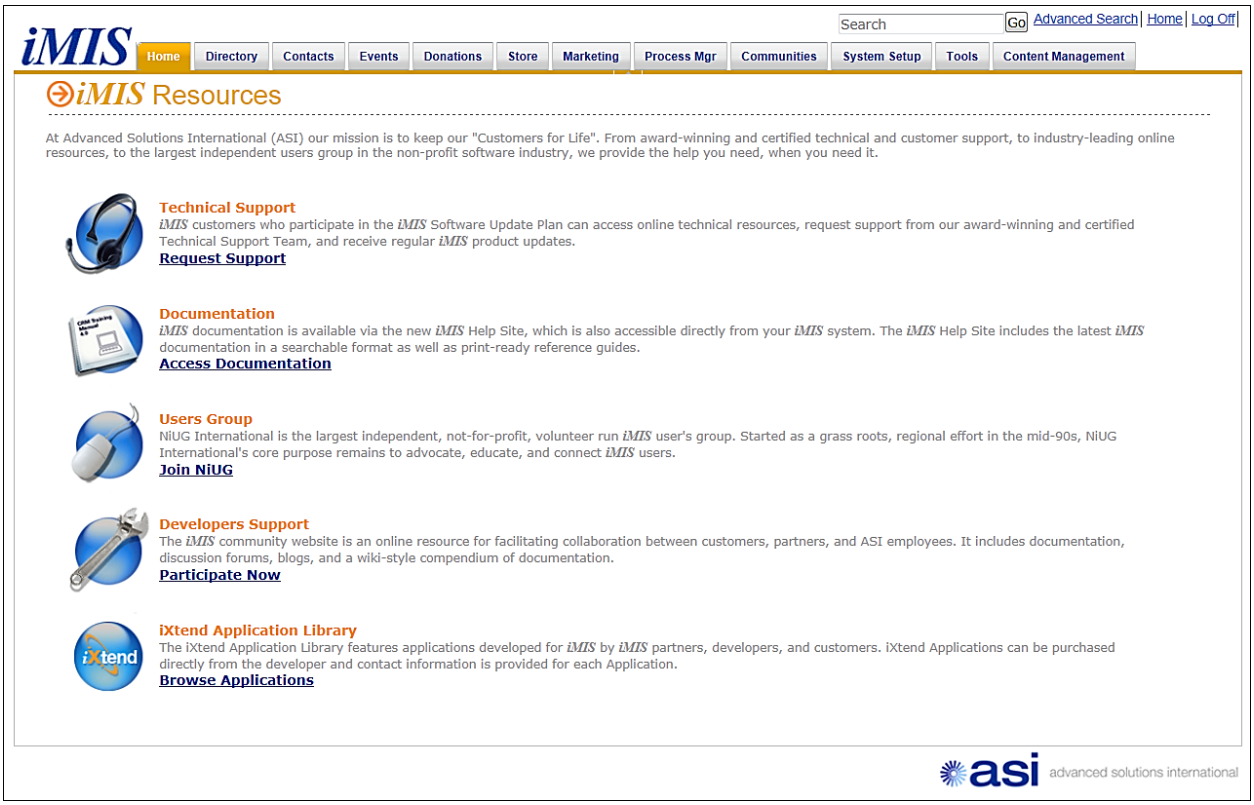
Staff views:

Staff site, Web view: Are sites designed to be a web-based management tool. Users who have been granted administrative privileges by your association will have the ability to manage your other sites.

Staff Site


iMIS
Sign Out
Dr. Chris L. Baker, PhD
Cart
On Behalf Of: (select contact)
Keyword Search
Community
Fundraising
Events
Commerce
Education
Continuum
RiSE
Dr. Chris L. Baker, PhD
President
Opus, Inc.
Member since 8/1/2004
Member type
Regular Member
Member status Active
Paid through 8/1/2014
Print Info
Public Profile
Donate
Order
Register
Membership is not due for renewal at this time.
Renew Now
About
Participation
Donor Data
Membership
Options
iMIS ID 18043
Member type Regular Member
Billing category
Chapter West
Renewed 11/5/2010
Last updated by CBAKER
Major key
Status Active
Paid through 8/1/2014
Member since 8/1/2004
Last update 8/8/2011 2:45 PM
Date added 11/5/2010
Addresses
Address
Home Address
+
333 N Michigan Avenue
Suite 900
Chicago, IL 60601-3901
UNITED STATES
(312) 555-4450
(512) 491-6298 fax
cbaker@imisdemo.com
✓ Preferred Mailing Address
✓ Preferred Billing Address
Personal Details
Options
Work phone (312) 555-4450
Email cbaker@imisdemo.com
Functional title
Date of birth 11/24/1972
Gender Male
Relationships
Add relationship
Ms. Jane M. Goodenz - child of
James Luckey - Referred By
Paolo Marchese - Knows
Mrs. Jane Parker - Recruited By

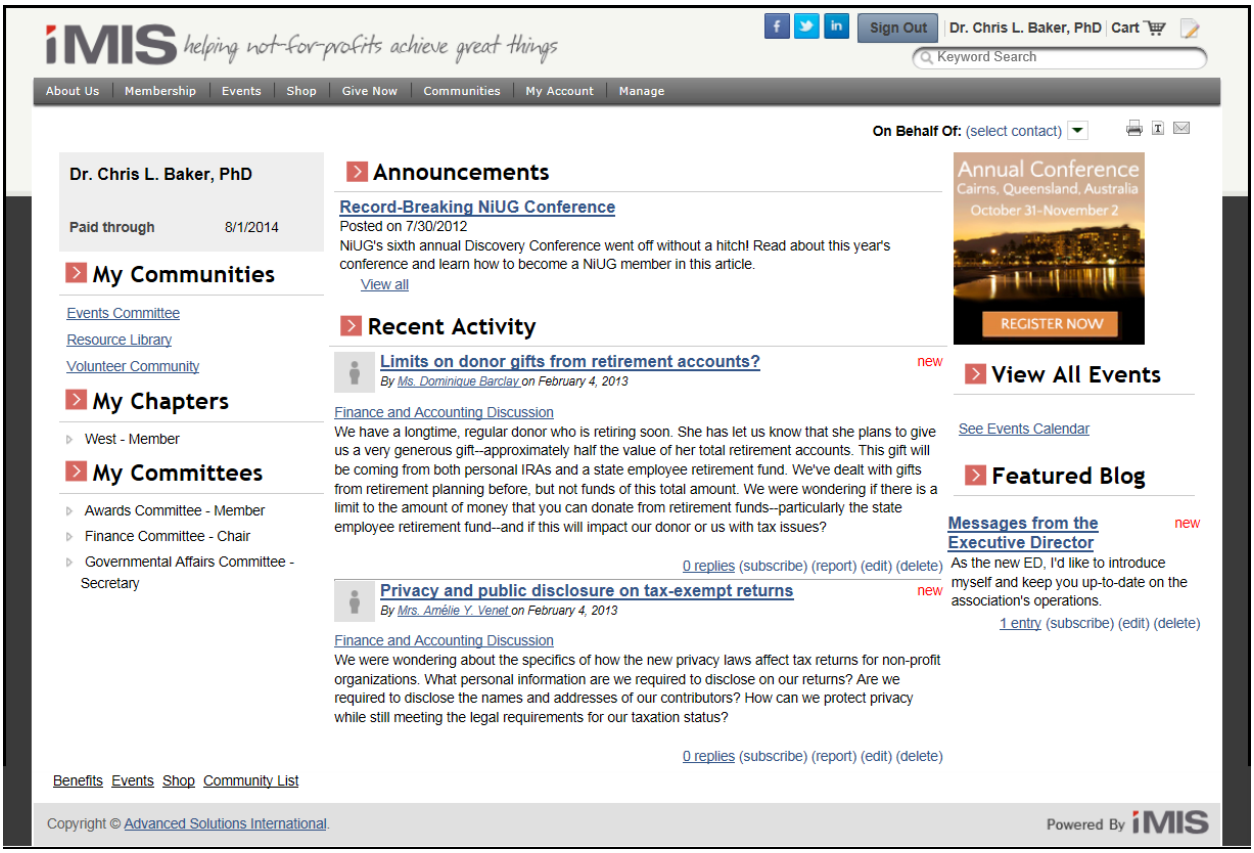
Web view



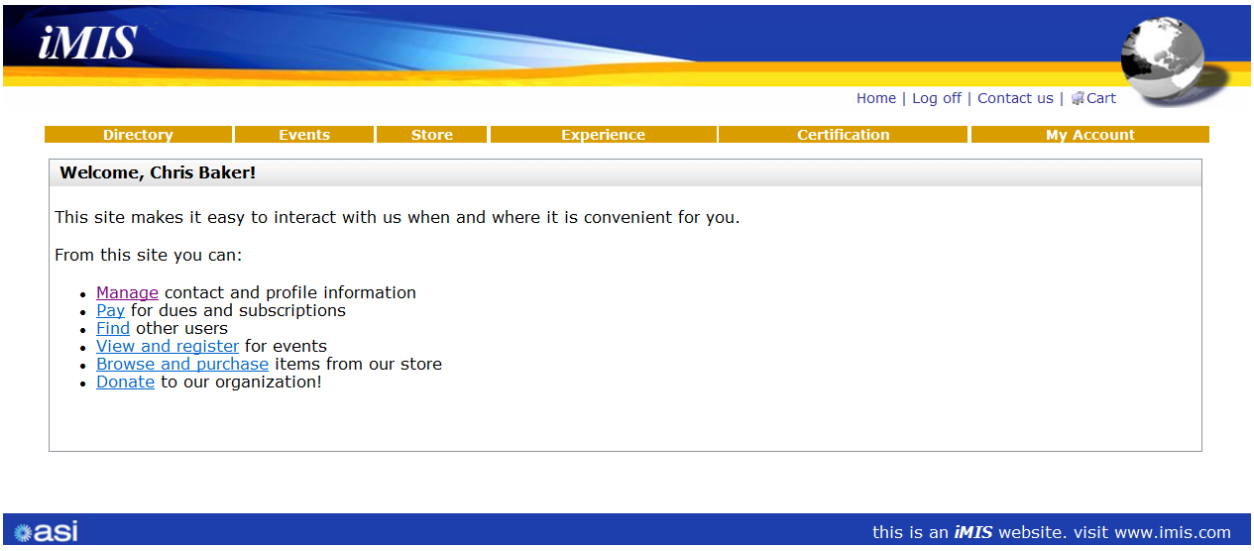
Member views

Member site, Public view: are standalone sites through which your organization engages Public users.

Member site



Public view



Administrative views

Administrative Console, Desktop: These are run from a workstation which can be hosted locally or remotely.

iMIS features by view and class

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

Licensing - the keys registered in your iMIS database, which enable features and numbers of users

Credentials - the user class and any roles, groups, authorization levels, and access keywords defined in each user record

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

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

Set up/manage events	■				
Orders					
View product orders	■	■	■	■	myself
Run orders-related reports	■		■		
Place product orders for a contact	■				myself
Set up products or warehouses	■				
Fundraising					
View giving history	■	■	■	■	myself
View gifts, pmts, adjs, rqsts	■		■		
Enter gifts via Rapid Gift Entry	■	■		■	
Run fundraising-related reports	■		■		
Process donation for a contact	■				myself
Billing					
View billing history	■	■	■	■	myself
Run billing-related reports	■		■		
Process accrual dues	■				
Pay billing for a contact	■				myself
Marketing	■	■			
Process Manager	■	■			
Financials	■				
Web Content Manager		■		■	
System Setup, Administration	■				

* Which contact records can be accessed?

Members find contacts and committees through the directory, which shows limited contact information

Members can access their own records

Members can also access the profile and event registrations for others in their organization (my company), but only if authorized to manage their company roster (see "Configuring settings for roster management")

Uses with access to the Staff site and to the Administrative Console are able to access all contacts

Learning iMIS

Advanced Solutions International provides a vast range of iMIS training courses. They are offered both as at-your-desk, web-based seminars, and face-to-face, in a classroom setting with an instructor.

The list of available courses is constantly expanding, and the existing training seminars are updated regularly to match the ever-improving iMIS product.

Available Topics	Description and link
iMIS Overview	Overview for Associations
	Overview for Fundraisers
iMIS Implementation	Implementation
Reporting	Introduction to SSRS (SQL Server Reporting Services)
	Introduction to IQA (Intelligent Query Architect)
	Applying IQA
	Crystal Reports
Customers	Customer Management for End Users
	Customer Management – Advanced Topics
	Customer Management for Administrators
Events	Events for End Users
	Events Setup
	Events Management
Billing	Billing/Dues for End Users

	Billing/Dues for Administrators
	Billing/Dues – Miscellaneous topics
Orders	Order Entry for End-Users
	Orders for Managers
	Orders – Inventory Management
AR/Cash	AR/Cash for End-Users
	AR/Cash for Managers
	AR/Cash Add-ons for Managers
iDashboards	iDashboards
Process Manager	Introduction to Process Manager
Fundraising	iMIS Fundraising
	iMIS Overview for Fundraisers
Applications Manager	Introduction to Applications Manager for iMIS
Business Object Designer	Business Object Designer
System Administration	Upgrades and Configurations
	Tailoring, Security, and Maintenance
Web	Web Content Management (WCM)
	WCM Configuration and Management
	WCM for Content Managers
TaskCentre	iMIS Task Centre
	Introduction to Task Centre
Programming	Certified iMIS Extension Developer
	iMIS SDK Programming (iParts, SOA, and iBO)
	Introduction to iMIS SDK

Terms and Concepts in i20

This glossary is designed to act as a reference guide to help familiarize users with the language used in iMIS. Users will be able to search through these terms and concepts alphabetically, without needing to navigate away from the page, or by using the Helpsite Search feature.

A-C

Access keywords

Keywords defined in the ACCESS_KEYWORDS general lookup table that control access to particular iMIS components.

Accounting

The systematic recording, reporting, and analysis of the financial transactions of an organization.

Accounting date

The Date assigned to the journal entry (or journal entries) related to the upfront recording and posting of a commerce transaction or to subsequent processing of the commerce transaction related to the change in accounting status. The accounting date should always align with the invoice date for an accrual standard invoice or an accrual adjusting invoice. For a payment, the payment deposit date should be used to record the cash receipts journal entry.

Accounting period

A regular period of time for which a financial statement is produced.

Accounting policy

A systematic routine that determines how the financial transactions of an organization are recorded and reported, such as how income (whether earned or a gift) is received and recognized, how expenses are authorized and paid, and how assets and liabilities are presented on the organization’s financial statements.

Accounts receivable

Money owed to an organization by customers who have bought goods or services on credit (when income is recorded on the accrual accounting basis). Accounts receivables are current assets that continually turn into cash as customers pay their bills.

Accounts receivable (AR)

Designates the class of accounts that represent the total, cumulative debt owed to you by customers who purchased goods and services on credit

Accrual basis

The accounting method that recognizes income at the time of sale (when goods are shipped/invoiced or services rendered) and expenses at the time they are incurred, independent of when they are paid for. This method focuses on events that have cash consequences for the organization.

Accrual basis

The system of accounting in which the income is recognized when it is invoiced or earned instead of when the invoice is paid.

Acknowledgement

A letter or other written notification sent to a donor to inform the donor that a gift or pledge has been received. iMIS allows for acknowledgements to be customized by salutation, body of letter, and sender.

Active contact

In the Administrative Console or Desktop, this is the member whose record is selected

Active member

An association member whose dues and membership are up-to-date.

Activity

A record, in iMIS, of a predefined type of interaction with a customer. For example, a cash donation generates a GIFT activity, conference attendance generates a MEETING activity, a solicitation generates a REQUEST activity.

Adjusting invoice

Invoice that is cross-referenced to a standard invoice for the purposes of increasing or decreasing product charges and/or reducing the open balance of the invoice.

Adjustment transaction

A commerce transaction (or a part of a commerce transaction) that impacts the current status of an original posted transaction.

Aging

The length of time an amount is past due for payment on an invoice

Alias (IQA)

An alternate name for a column (property).

Anniversary billing

Used when the membership terms fluctuate; usually corresponds to each customer's Join Month or subscription Begin Month.

Announcements

Items posted for information only. Announcements typically allow no replies.

Annual billing

Used when all renewing customers have the same Begin and End dates. The Begin Date could vary for new customers who join later in the year, and their dues can be prorated for a partial term.

Annual conference mobile site

A version of the Annual Conference that is optimized behaviorally and formatted for use on smart phones and tablets for both by association members and staff who are attending

events. Attendees gain quick access to their personalized programs, activities, and event feeds – and can instantly look up directory profiles of those attending with them

Annual conference site

An out-of-the-box micro site, designed to support critical projects such as an association's annual conference. This site maximizes the impact of the project without affecting the main association site or micro sites from different years, while still seamlessly integrating content between the various sites.

Appeal

A short-term activity with a specific objective that is a specific instance of a request, such as a mailing or telemarketing event. Appeals are not required in iMIS Fundraising.

Application

A specialized computer program or software package that performs particular tasks. The iMIS Customer system is an application.

Application Service Provider (ASP)

Third-party entities that manage and distribute software-based services and solutions to customers across a wide area network from a central data center. ASPs may be commercial ventures that cater to customers, or not-for-profit or government organizations, providing service and support to end-users.

Apply

Allocating or charging to an account, product, activity, or period

Asset

A non-cash contribution that has monetary value, such as real estate, stocks, or an annuity. An asset differs from an in-kind contribution in that its longevity is generally greater than a year. An asset is treated the same as an in-kind contribution in iMIS.

Asset

Something valuable that a financial entity owns, benefits from, or has use of, in generating income. In accounting, an asset is something an entity has acquired or purchased, and which has money value (its cost, book value, market value, or residual value). An asset can be

- something physical, such as cash, machinery, inventory, land and building
- an enforceable claim against others, such as accounts receivable
- a right, such as copyright, patent, trademark
- an assumption, such as goodwill.

Assets

Economic resources that are owned or controlled by the organization. Both AR and cash accounts represent assets

Attendance

The accounting of who was present at an event or function, as opposed to who signed up to attend (see registration). Because of no-shows, attendance figures will be lower than registration numbers. Accurate attendance tracking is important for awarding continuing education units, so the Update Attendance facility lets you mark verified attendees (or unmark no-shows).

Audit trail

A reference accompanying an entry (posting) to an underlying source record, or a trail of documentary evidence proving that transactions are authorized. A good audit trail lets you efficiently check the accuracy of accounting entries.

Authenticated user

A user who has logged in

Available

The product quantity on hand less the product quantity reserved.

Backorders

Backorders indicate that insufficient inventory is available to fill an order. Orders that cannot be filled are held in a backorder status until inventory is received.

Badge

A nametag that is given to each attendee to wear at the event. Badge formats usually feature the individual's nickname or first name, enlarged for readability, and include other identifying information such as full name, title, company, city, and state. Sometimes, each badge is marked with a color-coded strip to differentiate groups of attendees: customers, guests, exhibitors, speakers, and staff.

Badges

Name tags given to each attendee/exhibitor to wear at an exposition. Badges are usually formatted with the individual's nickname or first name, enlarged for readability, and include various identifying information: full name, title, company, city, state. Badges can be marked with a color-coded strip to differentiate groups of attendees, such as members, nonmembers, and exhibitors.

Balance

The sum of debit and credit entries in an account: if positive, it is a debit balance; if negative, it is a credit balance. A balance sheet is a report showing the assets, liabilities, and owner's equity of a business on a certain date.

Batch

A group or collection of transactions of the same general type, identified by a unique name or number. The transactions may be batched together by date or by other parameters.

Bill Begin

Projected Begin Date for an individual dues or subscription product. Refers to the first date of a term through which the item has been billed, whether or not payment has been received.

Bill To

Refers to whoever is responsible for paying the registrant's event fees. This may be the registrant or, as in many cases, a third party such as the registrant's company or employer. When a Bill To party is identified, all accounting and invoice transactions are tracked under the Bill To ID. However, all participation history continues to be tracked under the individual registrant's ID (if represented in the customer database).

Bill to contact

The party financially responsible to pay for an order. A single bill to contact is assigned to each order and to each invoice.

Billed thru

Refers to the projected Paid Thru date (expiration date) for an individual dues or subscription product. It is the term ending date through which the item has been billed, whether or not payment has been received.

Billing

The processing of renewable, specified-term products for a group.

Billing address

The address to which the invoice document should be sent. For online payments, the billing address of the credit card which is used for credit card verification.

Billing category

Optional subcategories of the customer type which define dues amounts when the customer type is not specific enough for an association's needs.

Billing cycle

A defined billing run set up to bill a particular group of people for a particular set of products.

Billing interval

Indicates how frequently customers are billed (The interval can be annual, semi-annual, quarterly, monthly, and so forth.)

Billing term

The period of time between the beginning and ending dates for the services or products that are being billed.

Bin

A specific location where a product is stored within a warehouse.

Blog

Chronological listing of entries, often created by one individual.

Book

A set of pages tied together in a hierarchical parent-child relationship. Multiple levels can exist and these can be used for manuals, FAQs, or other content groupings.

Booth inventory

Total number of items that have been generated for a particular booth product. For example, the total number of 10' x 10's would be the booth inventory for that product.

Booth preference management

Strategy for selling booths where preferences are assigned to exhibitors based on priority points or a ranking system other than the first-come, first-served method. This is typically used by organizations that use the lottery method of assigning booths. With booth preferences, exhibitors can select their first, second, and third choices for booths and are assigned preferences based upon specific criteria, such as how long they have been exhibiting and the amount of space they purchase.

Breadcrumb

Text showing the sitemap of a visited page that appear automatically on every site. These navigation areas must be enabled globally in the website’s sitemap

Business object

A collection of self-contained data that represents an entity or process, and shields the physical data.

Business object designer

An administrative tool for viewing, editing, and creating iMIS business objects that provides a graphical user interface to the properties related to business objects

Campaign

An orchestrated fundraising effort that lasts for a defined period of time, or a series of appeals. Although frequently used by fundraising organizations, campaigns are not required in iMIS Fundraising.

Cash account

Represents ready money available to the organization. Usually, there is a separate cash account for each bank account in which the organization maintains deposits.

Cash accounting

The system of accounting in which income is recognized when the payment is received for an invoice.

Cash basis

The accounting method in which income and expenses are accounted for on a cash-received and cash-paid basis. Contrast with accrual basis.

Cash GL account

GL Account that aligns with an individual bank account that is owned by a financial entity. Traditional payments, once processed and posted, will result in an increase in the balance of a Cash GL account.

Cash receipt

Cash amount (currency and checks) received and deposited into one of the organization's bank accounts.

Cash receipt document

Document that confirms the receipt of a payment from a customer and communicates information about how the payment was applied (such as applied to a new order or an existing open invoice balance).

Cash receipts journal

Journal in which all cash receipts are recorded before they are posted to the general ledger. These entries are reconciled regularly with the bank statements as an internal auditing measure.

Category

A category is a grouping of components similar to the way university courses are grouped by department. The category is a program requirement. You can group component requirements into categories so that completion of some or all of the components meets the category requirement.

Certificate

An official document awarded to an individual to recognize participation in a specific educational seminar or program. Certificates can be used as proof of participation.

Continuing education units (CEU)

Often expressed in hours or points, can be awarded to individuals who participate in or attend a specific educational seminar or program. These units are important for many professionals to earn certification and meet continuing education requirements.

Chapter

Method to organize contacts by regional areas.

Chart of accounts

A list of all the accounts (names and numbers) maintained by a business

Chart of accounts

System of accounting records developed by every organization to be compatible with its particular financial structure and with the amount of detail required in its financial

statements. The chart of accounts consists of a list of GL account names and numbers showing classifications and sub-classifications, serving as an index to locate a given account within the general ledger. A company has the flexibility to tailor its chart of accounts to best suit its needs, including adding accounts as needed.

Claim

In security, an individual right or action applicable to a particular resource. Individual rights are granted by a particular Issuer and allow a user to perform a specific operation on a specific resource or group of resources

Claims set

In security, a collection of claims granted by a particular issuer to a given user or required by a specific resource in order to perform a specific operation.

Classes (Exposition)

Categories or types of exhibitors (for example, member, non-member, and staff).

Client/Server technology

A method of processing data in which data is stored and processed on a central server, but users interact with data using local machines which retrieve data from and send data to the server.

Clipboard

A designated storage area in the operating system to which you can copy data and from which you can paste data. When you copy data in an application, the data is written to the clipboard.

Combo category

A combo category is a grouping of multiple categories.

Commerce

The trading of something of value (such as goods, services, or money) between two parties.

Commerce item

A representation of goods or services offered for sale. A commerce item may be a physical item, a service, a downloadable item, an event registration, a subscription, or a donation.

Commerce transaction

The data set result from the recording and processing of any or all of the following items: one or more new customer purchases one or more prepayments an ordered product the assignment of payment or billing instructions for an unpaid order balance one or more payments of an existing open invoice balance an adjustment related to a previously processed and posted transaction

Commissionable product

A product that generates a commission for a salesperson.

Committed

The actual number of products committed to fill open orders or the number of products in inventory that are awaiting shipping. Committed products do not include backorders.

Communities

An online forum that lets a group collaborate on projects, share knowledge, communicate and connect with others, and stay in touch using email subscriptions

Community list

A grouping of all of the communities associated with a particular organization or user

Company conflicts

Strategy that lets you identify companies that are in conflict with other companies. For example, the companies may be exhibiting the same or similar products and do not want their booths in proximity. By defining proximity areas, you can ensure that these conflicting companies do not exhibit their products or services close to one another.

Company flow down

A way to join customers through the Company ID. You can flow down data (such as address, phone, etc.,) from the company ID to the customer record joined by the Company ID.

Comparison method (IQA)

Specifies the method by which data is restricted for a column.

Completed

Indicates that the student has finished the set of requirements of a Certification program or component.

Complex group

A group with roles assigned to some or all members.

Component

A component is an individual requirement that must be completed before a student can complete a program and achieve certification. Components also may be tracked alone without a program to achieve certification.

Components

Individual items within a kit

Confirmation

A letter or notice confirming receipt of a registration and listing any fees that is sent to a registrant. A confirmation usually lists all of the functions the registrant selected and other details and instructions the registrant included, such as guest information. It may show the current status of the registration and include specific or general comments about the upcoming event, such as instructions for signing in on arrival and reminders of what materials to bring to the event.

Contact

The term iMIS uses to refer to accounts. Contacts are searchable, able to be edited and updated, and able to be linked to companies, committees, and workflows.

Contact status

Method to indicate standing within the organization for specific actions, communications, and workflows. Defaults:

- A – Active
- S – Suspended
- I – Inactive
- D - Mark for Deletion

Contact type

Method to categorize a contact for specific actions, communications, and workflows.

Contact reports

A section of reports tat are able to detail activity participation, personal information, and statistics, and through which users are able to create lables, rosters, and certificates.

Content authority group

A special type of iMIS security group whose members have permissions that are specific only to iMIS content management functionality. Content authority groups are also used to enable content authoring workflow

Content code

A tool used to help differentiate content records stored in different content folders with the same Publish File Name.

Content designer

Content management tool that allows organizations to build and manage pages of text, multimedia files, and iMIS iParts.

Content gallery

The location of the iMIS Dynamic Content Items (iParts) as well as traditional content types.

Content layout

An iMIS definition object that contains information for how the content zones of a content page will be arranged. A content layout defines only the arrangement of elements that will be displayed for a content page within the main content area - it does not define the overall layout of the website (which is defined by the site's master page).

Content page

An iMIS definition object that contains the content layout information and iParts needed to render a web page.

Content record

An iMIS definition object stored in the Document System that specifies all the information needed to render a web page for an iMIS-controlled website.

Content tagging

A method of categorizing website content that helps users retrieve information.

Content type

A registered iPart definition that includes the information required by WCM to configure the iPart, publish it, and display it.

Content types

These are the categories, divided into sub-folders, that contain the iParts within the Content Gallery.

Control account

General ledger account whose balance reflects the total of balances of related subsidiary ledger accounts. Accounts receivable and accounts payable are the most commonly used control accounts and their balances serve as a crosscheck (control) of the accuracy of the associated subsidiary records.

Credit

Amounts that carry a negative sign for accounting purposes and are represented on the right side of accounting journal (or T) entries. Liabilities, equity, and income accounts carry credit balances in the GL. As such, credit transaction amounts posted to these accounts increase their balances, while credits posted to asset and expense accounts decrease their balances.

Credit

Entry on the right side of a journal entry (that is, it carries a negative accounting sign). Credit has the effect of

- decreasing an asset or expense GL account balance
- increasing a capital, liability, or income GL account balance.

Credit memo invoice document

Official document sent by an organization to a customer (Bill To Contact) stating that an amount has been credited to an original invoice belonging to the customer. A credit memo invoice document is issued for a variety of situations, including when

- an invoice amount is overstated
- the correct price sheet or promotion was not applied
- the goods spoil within the guaranty period
- the goods do not meet the customer's specifications and are returned.

Customer

A person who has met the membership criteria set up by the association.

Customer type

Categories of membership that define the membership levels and amount charged for membership, or dues and subscriptions.

Customers terms

Customers is the core area of functionality where back-office customer relationship management occurs.

Customizer

An iMIS utility used during system setup to create custom tables and windows for an association.

D-L

Dashboard

The landing page for each of the main navigation areas of the staff site. It provides a quick view of important, up-to-date association contact and membership figures.

Database

An interactive collection of related information that is organized into meaningful units (Files, Records, Fields, graphics, and photos) for storing and accessing in order to facilitate searching and updating information.

Date-limited group

A group with specific join and end dates for the group or for a role in the group.

Deadline date

The deadline date is the date by which the program or component requirements must be completed.

Debit

An entry on the left side of a journal (or T) entry (that is, it carries a positive accounting sign). Debit has the effect of

- decreasing a capital, liability, or income GL account balance
- increasing an asset or expense GL account balance.

Debit adjustments

Have the opposite effect of credit memos, increasing the debit balance of open accounts receivable, such as increasing or adding a line item charge or bringing a credit balance to zero due to an overpayment, credit memo, or cancellation transaction. Debit adjustments allow one or multiple funds to be debited at month's end.

Debit memo document

Official document sent by an organization to a customer (Bill To Contact) stating that a new amount is owed due to a change applied to an original invoice. A debit memo invoice document is issued for a variety of situations, including a product price change.

Default accounts

Accounts assigned to your organization's entities that serve as the default account if a payment is entered without specifically assigning an account for the payment.

Deferred income

The principle of accounting in which the recording of income is deferred until the accounting period when the costs are incurred related to the generation of the income. For example, for an event, the deferred income is recorded during the month in which the event occurs. For a subscription or membership, it is typically spread evenly across the span of service.

Designation

A designation is an acronym that is appended to an individual's name to indicate the individual has completed a certification program and is certified in a specific area.

Display order (IQA)

The order that columns display in the results for a query.

Distribution

Refers to an organization's selling, advertising, and delivery activities

Document system

A server-side file system containing documents and objects (business objects, query objects, and output processes).

Donation

A monetary or in-kind contribution that is associated with an iMIS distribution. This is a pre-defined combination of a campaign, fundraising appeal, and fund.

Donor clubs

A means of recognizing various levels of giving by contributors. For example, an organization may designate a donor as a “friend” in recognition of contributions of $500 or more, or as a “benefactor” for donations of $1,000 or more.

Donor site

A rich and highly customizable Web site for fundraisers conducting charitable campaigns and product sales with the public.

Down payment

An initial payment on an installment pledge. A down payment is treated as a gift.

Due to-due from processing

A means of correcting balancing problems when a payment is received and is deposited to an account that is owned by an entity different than the owner entity of the gift or pledge. Due To-Due From entries are generated when transactions are sent to the General Ledger.

Dues

Membership fees charged to customers.

Duplicate record check

A formula used to make sure the same record is not entered in the database twice. Duplicate record checks are often used on the Major Key field (such as Social Security Number).

Easy edit

See also Surf-to-Edit. An icon that enables staff users to edit and configure iParts and content directly, rather than through the formal content management process.

Effective date

The date used to determine which customers will be billed. Normally, a customer or subscriber will be billed if they have met the billing selection criteria, their Paid Thru date is before the Effective Date, and if a renewal has not already been generated. If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

End date

Date on which an individual's group membership ends.

Enrolled date

The enrolled date specifies the date that the student enrolled in the program or component.

Equity

Net value, or the excess of total assets over total liabilities

Event

A gathering, such as a seminar, convention, or board meeting, for which you need to organize, plan, and track details, including the list of expected attendees.

Event

A gathering of individuals that traditionally occurs at a particular time and place. The event may occur at a particular location and be attended in person (i.e., conference, seminar), or it may occur in a virtual meeting place (i.e., webinar, teleconference).

Event code

A tool used to help differentiate event records stored in different content folders with the same Publish File Name.

Event coordinator

An individual who is responsible for managing the planning and/or operation of the event or some aspect of the event.

Event showcase

The detailed display of information about an event. The showcase can include images and a variety of information.

Exhibitor

An individual representing a company who exhibits the company's products or services at an exposition.

Exhibitor products

Product(s) or service(s) that exhibitors show, demonstrate, and/or sell.

Expense

Cost incurred during normal operations, decreasing the owners' equity. Expenses use up assets in producing revenue or carrying out the organization's operations.

Expense

Money expended or cost incurred in an organization's efforts to generate revenue. An expense is typically an event in which an asset is used up or a liability is incurred, such as cost of goods sold, damaged goods, and bad debt expense.

Expiration date

Date on which a group member's role expires. For example, the treasurer might serve one year, but the chair of a committee serves two years. The individuals are still members of the group after their specific role term expires.

Exposition

Large event featuring many companies exhibiting products and services usually associated with one another by the industry they serve or by a similarity of the products and services they exhibit.

Exposition products

Sold by the exposition organizers to the exposition participants, usually called exhibitors. Exposition products are most commonly booths but also include passes and other products, such as sponsorships and advertisements.

Facility

A location that provides a particular service, typically the venue within which an event is being held (i.e., convention center, hotel, meeting room).

Fees

Amount charged for events such as educational workshops, seminars, and conventions. Typically, fees are charged for event registrations, but additional fees may be charged for individual functions (for example, workshops, social functions, and meals). In some cases, an event registration fee may entitle a registrant to attend certain functions, and the registrant can purchase additional guest tickets to those functions. Commonly, fees vary by type of registrant (for example, member, nonmember, and speaker) and by the date of the registration (for example, early, regular, and late).

Fees

Amounts charged to exhibitors for the various exposition products. Fees can be set by exposition classes/types and by when a product is purchased.

Field

An individual data element contained within a record. A field may appear in a data maintenance window in the form of a labeled text box or option. The components of the customer name in the Customer Portfolio, for example, are all fields. Note that field may be referred to as a column in certain cases.

Filter (IQA)

One or more column-specific search conditions.

Financial entity

A legal entity for which a separate set of balanced financial accounts (or set of books) must be maintained independently. Although accounting information from different

entities may be combined for consolidated reporting purposes, all transactions and accounts must be kept in balance for each entity.

Fiscal period

A month/year combination expressed in terms of a financial entity's fiscal year (as opposed to the calendar year). For example, if the calendar date of an accounting transaction is April 15, 2009, and the fiscal year begins in April, then the fiscal period is 1/2009. Likewise, if the transaction calendar date is is March 15, 2009, the fiscal period is 12/2008.

Fiscal year

Accounting period covering 12 consecutive months over which a financial entity determines income and profits. The fiscal year does not necessarily correspond to the calendar year.

Formal event

An event for which an official registration or a fee is required as a prerequisite for event participation.

Formal registration

An official event registration for a formal event. Usually, the registrant is expected to attend (i.e., a slot or seat may be held for him/her) unless the registration is canceled.

Fulfillment

The act in which the selling organization meets its financial obligation of delivering the goods and services that have been ordered by a customer. In the case of a physical product, fulfillment occurs when the product is shipped or physically delivered to the customer.

Function

A single session or activity within an event for which you need to assign fees or track attendees. A function can range from breakout sessions and educational workshops to social events such as golf tournaments, banquets, and tours. Because all fees are

processed at the function level, you must set up at least one function record for each event or seminar for which fees are assigned.

Function (in Events)

A sub-event or session that occurs within the context of an overall parent event. For example, a conference may incorporate multiple functions or mini-meetings over the course of the conference date span. Such a conference may include multiple break-out sessions, social events, and networking sessions.

Function (IQA)

Summarizes some characteristic of the current set of rows. The functions that are available depend on the data type of the column you selected.

Fund

A legal entity within the organization with its own sets of books. It is a required component of iMIS Fundraising.

GAAP (Generally Accepted Accounting Principles)

Authoritative rules, practices, and conventions meant to provide both broad guidelines and detailed procedures for preparing financial statements and handling specific accounting situations.

General journal

Journal used to record journal entries other than those that are recorded in the Sales and Cash Receipts journal.

General ledger

The final record of the transactions affecting an entity; the ledger contains one page for each account

General/lookup validation table

A table an administrator creates in the iMIS database that contains the valid values for a given field. You can click the lookup icon to select a value or place your cursor in the field and use Ctrl+L to see the valid values.

Gift

A payment of cash, cash equivalents, assets, or in-kind donations that has already been received.

Gift item

A commerce item that has a suggested amount price, such as for a donation.

GL account

An individual account within the Chart of Accounts that is used to record a financial amount in a journal entry.

Good thru date

The good thru date is the date by which the student must complete the program requirements in order to attain or maintain certification.

Grace period

A grace period is the additional time given to students to complete a set of maintenance requirements.

Group

Method to organize contacts according to pertinent criteria such as chapters, interest groups, industry, or subscribers.

Group member

A contact who is, has been, or will be a member of the particular group.

Group member status

A potential membership stage or state within a detailed group.

Group role

A classification of the way in which a group member participates in the group.

Group type

A method of classifying similar groups for efficiency in setup and reporting. Default information is assigned to a group type, but can usually be changed at the individual group level.

GUID (globally unique identifier)

A 32-character hexadecimal string used to provide a unique reference number. iMIS often uses a GUID to identify controls and interface objects.

Guided performance scorecard

A report that provides a visual representation of association performance in several key areas including recruitment, engagement, and growth.

ID

The numerical representation assigned to a customer or organization.

Identity claim

A security function that describes a set of attributes about a user or other entity.

iMIS dynamic content items (iPart)

The unique components of core iMIS functionality that can be placed together on a content page. They are flexible, re-usable and powerful. Most the core iMIS functionally is available as a dynamic content items.

Income

Revenue gained from sales of goods and services

Income account

The account number by which income amounts are recorded or recognized. The income account is maintained with the Profit and Loss set of accounts.

Income account

The General Ledger account number to be credited with the fee charged for a particular class/function combination (for example, income or deferred-income account). This information is optional but should be entered if you are want transaction-level reports to print the appropriate account numbers.

Initial requirements

Initial requirements are those requirements that a student must complete to earn initial certification. These may or may not be used with a different set of requirements to maintain certification.

In-kind donation

An in-kind donation is a type of non-cash contribution with market value, such as professional services, equipment, or supplies. It differs from an asset contribution because it can be expected to be used up within a year.

Installment

One of a series of partial payments on an obligation over a period of time. For example, a quarterly installment is paid once every three months.

Instance

An instance is a unique occurrence of a component, such as a specific class. An instance also is called a location.

Instructor

The instructor is the person teaching or presenting a course or component.

Inventory setup options

The accounting treatment to be used for inventory. System defaults are FIFO, LIFO, Average, and Standard.

Invoice

An official object that itemizes all of the product charges and miscellaneous fees involved in a sales transaction. The invoice contains key reference data such as the invoice

number, invoice date, references to the originating order, customer information, and billing instructions.

Invoice date

The date on which the invoice was issued or created, usually the date of product fulfillment. For an accrual invoice, the invoice date is the accounting transaction date for the related sales journal entry.

Invoice distribution line

An object attached to a parent invoice line that carries related accounting information and represents the detailed invoice balance level to which all payments are applied. Individual invoice distribution lines are created for each income account that is used in booking the income for the parent invoice line.

Invoice document

The printed or electronic invoice information sent to a customer.

Invoice due date

See "Payment schedule due date".

Invoice header

The portion of the invoice that contains general information about the invoice, such as the invoice number and date, customer information, and billing instructions.

Invoice line

A sequentially numbered line in an invoice that represents the charges for an individual product line (or a partial quantity of a product line) that has been fulfilled or a miscellaneous fee (such as taxes or shipping and handling). The extended amounts of all invoice lines should equal the grand total of an invoice.

Invoice number

A unique, sequential number assigned to each invoice as the primary reference.

iPart (Dynamic Content Item)

The unique components of core iMIS functionality that can be placed together on a content page. They are flexible, re-usable and powerful. Most of the core iMIS functionally is available as a dynamic content item. It is an ASP.NET web part control designed for integration with iMIS that allows user to view and, in some cases, create and edit content.

IQA (Intelligent Query Architect)

The query-building tool used to extract data from the iMIS database.

Issuer

A trusted source for granting Claim Sets based on user authentication.

Item

Generic term for commerce objects. For example, an event item, a dues/billing item, or a gift item. Items can be grouped into item sets.

Item class

The method to assign the default GL accounts, tax schedule, standard discount percentage, and other settings to be used for a type of commerce item, such as Chapter Products or National Events.

Item set

A collection of commerce items with related options and rules. For example, and event plus required functions, a product bundle, or a collection of membership and other fees.

Item showcase

A display of information about a commerce item. The showcase can contain all information and images for the item or can link to other pages.

Item type

A general kind of simple commerce item, usually used to differentiate a gift (donation) with a suggested amount from a commerce item with a set price.

Itinerary

A list of functions a person has chosen for an event. The itinerary can contain an informal choice of functions (pre-registration itinerary) or a formal registration, if required (post-registration itinerary).

Join date

Date on which an individual became a member of a group.

Joins (IQA)

Relationships between data used in query definition. Joins specify which fields are equivalent so the data is associated correctly.

Joint requirements

Joint requirements are those that a student may use if the student is enrolled in two programs.

Journal

Business diary in which all financial data pertaining to the day-to-day business transactions of an organization is recorded. From the journal, debit and credit changes caused by each transaction will be posted to the designated accounts in the general ledger.

Kit

A product set of two or more components (items or services) that are sold for a single price. Kits are often used to present a group of items as a bundled, discounted product. In addition, kits are a useful method to distribute the costs of individual items (components) among multiple income areas for accounting purposes.

Ledger card

Shows the record of the transactions related to the individual currently selected

Liability

Claim against the assets or legal obligations of a person or organization. Liabilities include amounts owed to lenders and suppliers, amounts received in advance for a future sale or for a future service to be performed (unearned or deferred income).

Liability

Debt or financial obligations owed to creditors

Line item

Individual dues or subscription line associated with a specific customer or subscriber

Linked function

Linking functions is a one-way shortcut for data entry by which registering for a primary function automatically registers for all linked functions (that is, selecting the parent selects the children).

Linked product

Associates a “primary” or parent product with a “child” or secondary product. When exhibitors order a primary (parent) product, iMIS automatically adds the linked “child” product to the order.

List as

An alternative way to list a contributor when the contributor does not want to be acknowledged by name. For example, the contributor may want their gift or pledge listed as “in the name of”, or “the family of”, or “anonymous.”

List billing

The generation of a single renewal notice to a Bill To third party, such as a company who will be responsible for paying the fees for multiple customers or subscribers.

M-R

Maintenance requirements

Maintenance requirements are the requirements a student must complete to maintain certification after initial certification. Maintenance requirements typically must be completed repeatedly over specific time periods.

Mapping

Translates one value into another. For example, iMIS might translate (map) a virtual address into a physical address.

Matching gift

A gift created when a donor's employer has agreed to make a matching contribution (usually a percentage of the employee's gift) when the donor makes a gift. iMIS treats the matching gift as a request or a pledge until the money is received from the company.

Matching plan

A plan set up by a company to match gifts donated by its employees to nonprofit organizations. In iMIS, the matching plan is set up as a percentage of gifts/pledges within a certain monetary range (for example, 25 percent of employee gifts ranging from $20 to $100).

Member mobile site

An out-of-the-box iMIS site that renders a version of the Member site that is optimized behaviorally and formatted for use on smart phones and tablets. This site is accessible by your association members and by your staff who are working off-site or on the run

Member site

An out-of-the-box iMIS site that offers a rich self-service experience for your association members and prospects. This site enables you to choose from a variety of visual themes, change navigations in just a few clicks, and add any number of query-driven iParts to present dynamic information to your site visitors.

Memorial

A gift or pledge made in memory of someone.

Method of receipt

Indicates whether purchased item will be shipped to the customer or customer carries the item out. The method of receipt effects which taxes should be applied.

Monetary application

The link between an invoice distribution line with another object (such as a payment, a payment reversal, or an adjusting invoice) that is applied towards decreasing or increasing the balance of the distribution line. In most cases, a monetary application represents the amount of a payment that is applied towards an individual invoice distribution line.

Multi-entity

For accounting purposes, multi-entity enables you to use distinct financial entities, for which separate accounting statements are prepared, for different purposes within iMIS modules.

Multi-function event

An event that incorporates multiple break-out sessions, social events, networking brown bags, or other functions which a registrant can attend.

Multiple entities

For accounting purposes, defining more than one individual or organization for which accounting statements are prepared. For example, an association may need to assign certain accounts to a nonprofit entity and others to a for profit entity.

Multi-warehouses

An option that allows you to record and store a stock item's inventory in several different warehouse locations.

Net income

Total income in an accounting period, less all expenses during the same period. If income taxes are not deducted, it is called operating profit (or loss). Also called earnings, net earnings, or net profit.

Non-authenticated user

A user who has not logged in

Non-commerce event

An event in which there are no fees. Registrations for a non-commerce event are processed on a direct basis, not through a commerce order.

NonCustomer

A person who has not met the membership criteria set up by the association.

Notice specific text

Refers to the additional text that can be printed on the initial, first or second billing and reminder notices.

Notification

The acknowledgement sent to the Notify IDs (family, business associates, and friends) when a gift or pledge is made “in memory of” or “in tribute to” their family member, business associate, or friend.

Notify ID

A family member, business associate, or friend of an individual who is being memorialized or honored. Notify IDs will be notified when a gift or pledge is made in memory of or as a tribute to the honoree.

Object (IQA)

Self-contained element that consists of instructions to manipulate data; for example, a business object or query object.

On behalf of (proxy)

Performing an action in place of another person.

On order

The quantity of a product on order with a vendor or supplier.

Open credit

The portion of any payment that is in the unrestricted, unapplied state. An open credit can be applied toward new or existing orders or open invoices.

Open invoice

An invoice with an unpaid balance.

Open item

Any item with a non-zero debit or credit balance.

Open order

An order that is not 100% fulfilled.

Operation

A well-known system function, such as Create, Read, Update, or Delete that can be performed for a specified resource within the application.

Order

A customer request to purchase one or more products.

Order

A request to purchase products.

Order (Exposition)

Commitment by the exhibitor to participate in an exposition by purchasing booth space and possibly some other exposition products.

Order processing stages

Steps orders must go through until the orders are complete. The number and type of order processing stages an order goes through depends on the setup of the order type. Different order types require different order processing stages. Examples of order processing stages include Convert quotes, Print shipping papers, Ship orders, and Invoice orders.

Order types

Determine how orders are processed. All orders are entered as a specific order type.

Organization

Name for company-type contact record.

Overlay text

Additional or customized text that can be printed over or on top of the preset renewal notices with the standard report elements printed underneath. It behaves similarly to how a transparency would lay on top of a paper.

PAC (Political Action Committee)

A group or committee created to raise money for the purpose of electing a candidate.

Page builder

The tool used for building web pages comprising content items in the Content Gallery. (Formerly known as Content Designer)

Paid Thru

Refers to the expiration date of the membership or subscription, or the period through which the customer has paid. It is always the last day of the month.

Parameterized query (IQA)

A query that requires a value from the user at runtime.

Pay priority (commerce)

The order in which payments are applied to invoice line items.

Payer contact

The party who actually made the payment (officially owns the bank account or credit card being used for the payment). The payer contact is normally, but not always, the same as the bill to contact.

Payment

A sum of money paid.

Payment alternative

A category of payment instructions which are provided in lieu of a traditional payment, such as Bill Me, Bill My Company, or Application of Open Credit. Payment alternatives do not create a brand new payment object when processed or posted.

Payment date

The date when a payment was deposited into the bank account. The payment date will always be assigned as the accounting transaction date for the related cash receipts journal entry.

Payment instructions

Information collected and/or derived by the system that indicates how a financial obligation will be met.

Payment method

The allowable method of payment a customer can use and the bank account into which the payment should be deposited. The payment method may specify the general type of payment (credit card, cash, check) or it may specify a specific type of payment (VISA, MasterCard).

Payment method set

The collection of pre-defined payment methods that are allowed for a particular commerce transaction process.

Payment reversal

A complete or partial reversal of an original payment stemming from a credit card refund, a bad check, or a credit card charge back.

Payment schedule

The amount due and due date for payments, in accordance with the payment terms.

Payment schedule due date

The date by which the payment for an invoice balance must be received. The due date is typically calculated as a certain number of days from the invoice date, in accordance with the payment terms.

Payment terms

The period of time allowed to pay for the goods and services that have been ordered. Payment terms may include standard terms (such as Net 30) or a specified payment schedule.

Payment type

The highest-level category of payments such as Cash, Credit Card, Debit Card, or Bill Me. The payment type defines the required information to be entered for payment instructions and how the payment transaction should be processed.

Person/People

Name for individual contact record. Contact records contain the descriptive contact and demographic information for each iMIS user (and for non-users). A contact record must be created for a new user before you can create a user record to link to that contact record.

Pledge

A contribution to be made sometime in the future that has not yet been received. A pledge can be a one-time contribution or can be made in installments over time.

Posting (batch)

Procedure that updates accounts with specific transaction amounts or transfers temporary transactions to permanent records (appropriate accounts in the general ledger).

Premium

An incentive gift that a donor may receive for a gift or pledge, such as a coffee mug or T-shirt, in recognition of the contribution. A premium is a distribution with an assigned market value.

Prepayment

A payment that accompanies an order or is made in advance. The prepaid amount is recorded in an Unearned Income liability account until the ordered products are fulfilled and the payment is applied to the associated invoice(s).

Prerequisites

Prerequisites are the requirements a student must complete before the student can enroll in a certification program.

Price sheet

A set of product prices and price calculation rules assigned to customers or orders of a certain type.

Priority (IQA)

The order in which the data for a particular column is sorted.

Pro forma order

An order initially treated as a price quote that may result in a sales order at a later date.

Process manager

Helps to optimize opportunities presented to an organization, build ongoing relationships, and manage processes assigned to individuals or groups. It provides the means to analyze, forecast, and report on those efforts.

Product

An item or service that your organization offers for sale to its customers.

Product adjustments

Adjustments to inventory due to breakage, pilferage, giveaways, or physical inventory count differences.

Product category

An association defined classification for products. These are used to assign default accounts and to enable category options for groups of products

Product codes

Refers to a unique code that identifies a product that will be billed, or for which an organization collects money.

Product conflicts

Strategy for ensuring that companies exhibiting similar products do not exhibit in the same area. Product conflicts are managed by defining proximity areas and only assigning booths to companies exhibiting certain products in those areas.

Product kit

A group of products sold as a single unit for a single price.

Product receipts

Receipts record products received in inventory.

Product transfers

Transfers allow you to transfer a product's inventory from warehouse to warehouse.

Products

A defined commerce item

Program

A program is the set of requirements a student must complete to achieve certification. A program also may have multiple parts, such as a set of initial requirements to obtain certification and another set of requirements to maintain the certification. You also can specify specific date by which a program must be completed.

Program groups

An association of multiple certification or experience programs together, requiring one program to be a pre-requisite for another program

Prorating

Allocating or assigning an amount to an activity or product that is proportional to some base (determined by a formula or procedure).

Provider

A provider is the individual or company who sponsors a component instance, such as a class or course.

Proximity

You can identify and define proximity areas as a strategy for managing company and product conflicts. Proximity is defined by location relative to certain areas of the floor, such as the Food Court, or relative to location, such as the Southeast Quadrant. You also can use proximity to group similar vendors together on the floor, such as in the Technology Center or the Education area.

Proxy

See On behalf of.

Pseudo

These are iMIS-generated GL accounts. The pseudo accounts are duplicates of actual GL accounts. The pseudo contains the Org Code - Module-, Product Code, AR, or Pay.

Publishing server

A local service running on a web server that generates physical files representing the content defined by a content page and add related search metadata to the search index on the local web server.

Quantity on hand

Specifies how many products are currently in stock. These are products that have been received but not shipped.

Query

User-defined criteria used to retrieve a subset of data.

Quick start sites

The ready to go sites and site templates that can get you up and running in hours, instead of weeks or months.

Rapid gift entry

Gives the ability to enter Date Received, Gift Type, Gift Amount, Distribution, Appeal, Campaign, and Fund from the Enter and edit gifts window.

Record

A record is an individual unit within a table that consists of a collection of fields (which are consistent in number and type from one record to the next). For example, there is a separate record for each individual or company whose information is contained in iMIS. Records are sometimes referred to as table rows.

Registrant

A person who has formally registered for an event.

Registrant

An individual who signs up to attend a particular event, typically by submitting a registration form along with payment of any registration fees. An individual registrant may not necessarily be a customer of the association holding the event or have a record in the customer database.

Registrant class

A broad group of registrants that enables you to process and handle registrants according to category. Class categories let you assign different fees for members and nonmembers, print badges separately (such as for color coding), and subdivide summary reports into meaningful registrant classes.

Registrant information

Personal information including, but not limited to, registrant name, address, title and association affiliation. This is used for reporting, and can also be used for event badges.

Registration

The recording of those signed up for an event or function, as opposed to those who actually attended (see attendance). Because of no-shows, registration figures will usually be higher than attendance figures.

Registration

The recording of people who sign up to attend an event, typically in advance of the event occurrence (except for on-site registration).

Registration option

The classes of registration set up for an event. These can be arranged by membership type, payment status, or time of registration.

Registration status

The current state of relationship between a person and an event or function.

Registration type

Designation of an event's requirement for registration or fee.

Relation(IQA)

The part of a query definition that specifies a relationship between two or more sources, which effectively creates a new temporary table against which the query is run.

Relationship

A method for establishing a logical connection between one customer and another in the database.

Relationship (Join) operator (IQA)

The specific type of relationship between two sources.

Renewal invoice

An invoice generated by the selling organization to request that the customer repurchase or renew a subscription or membership service. The renewal invoice data is generated directly and is not connected to the fulfillment of an order.

Renewal notice

Document that is frequently sent to a customer instead of a renewal invoice. The renewal notice is typically used in cash basis accounting systems to document the renewal or continuation of a subscription or membership.

Renewal notice

Refers to the request for renewal or continuation of a membership or subscription beyond the current expiration (Paid Thru) date.

Renewed thru

Refers to the projected Paid Thru date for an overall membership. It is the term ending date through which the customer has been billed, whether or not payment has been received.

Reporting

A set of tools in iMIS that can be used for a wide range of tasks. Reports span a broad range of outputs for all of the iMIS modules, including rosters, status summaries, letters, badges, and statistical reports.

Request

A record of a specific request for a donation. A request is recorded at the time the request occurs, such as when you mail a letter or make a telephone call asking for a donation. Entering a request activity can speed the entry of a resulting donation.

Reservations

Companies can reserve exposition products without making a payment or placing an order. Exposition products are reserved in the Reservation window where you can assign booth numbers and proximity area. Not all organizations allow companies to reserve exposition products.

Reserved

Indicates how many products are in open order status. Reserved orders include both shippable and backordered items.

Resource

A type of equipment, an individual, or some other asset needed to perform a task or service at an event function. Within iMIS Events, resources refer to both specific and categorical groupings used to describe room setup and planning needs.

Resource

An application object that exposes properties and methods to allow users to interact. In claims-based security, such resources are assumed to be secured.

Resource group

A logical group of related resources that share a common set of claims. Such groupings simplify the need for assigning and checking for required claim sets.

Restocking fee

A fee charged to restock returned products.

RFM

A measure of the recency (Period of time in days or months that has elapsed since the last transaction between a contact and an organization) frequency, (number of times a contact has transacted with an organization), and monetary (value of a contact's transactions with an organization)participation of contacts and prospects.

RFM report

Ranks and organizes contacts and prospects into specific groups according to the relative recency, frequency, and monetary value (RFM) scores of their transactions.

RiSE

The Web Engagement Platform in which iMIS is built, and you (the client) can build and extend your own sites.

Roster

A report listing registrants for events and/or individual functions within an event. This is different from the Company Roster which is shown in the Customer Portfolio.

Rotating requirements

Rotating requirements are requirements that must be completed repeatedly for the student to maintain certification.

S-Z

Sales journal

Journal for first entry of sales invoices issued to customers for goods supplied or services rendered. Entries from this journal are posted to individual customer accounts. The totals are posted to the general ledger as a debit to accounts receivable and a credit to income.

Sample site

The out-of-the-box iMIS websites that are easily copied in order to create customized sites for an organization. Sites include Member, Member Mobile, Donor, Annual Conference, and Annual Conference Mobile.

Schema

The structure of a database.

Search index

A database (used by an index server running on a web server) that is updated by the publishing process and is used for quickly retrieving weighted results for website searches and in the compilation of output for tagged list content.

Security administration

Provides options for administering user records and the roles you can associate with user records.

Security groups

Control which iMIS features group members see and which capabilities within each feature they can use and are defined in the user record

Security roles

Grant specific administrative privileges to user records. For example, one security role might let you use and edit an iMIS definition object in the Document System, while another role might let you use that object but not edit (or even see) its properties.

Segmentation

Groups contacts and prospects into targeted audiences to show demographics and behavioral patterns

Shopping cart

A tentative commerce transaction data set that exists for any new commerce transaction until checkout and order submission. The cart may contain products added to the cart, adjustments processed, and the list of open invoices selected for payment. Items can be added, edited, or removed from the cart at any stage before submission.

Shortcut URL

iMIS-supported ability to define a friendly, easy to remember URL that redirects to a specific page. These can be created for any website, and can link to a URL or content record.

Simple event

An event with no functions. A simple event can be for information only (no registration required) or can require registration.

Simple group

A group with no assigned roles or date limits.

Simple item

A commerce item that has a single price.

Site builder

The tool used for building and managing websites

Site designer

A website and navigation management tool that allows organizations to establish one or more websites, create navigation menus and connect navigation to content.

Site designer

The RiSE tool through which websites are managed and configured

Site map

A zero-based hierarchy of navigation within and between websites

Soft credit

A term used to describe a behind-the-scenes individual who helped obtain the gift or pledge, but who is not listed as the donor. Contrast soft credit with the contributor or “hard credit,” the individual who receives the actual credit for the gift or pledge.

Solicitor

An individual other than the donor responsible for obtaining a specific pledge or gift.

Sort

Dictates the order in which the details are to be displayed or printed in a list or on a report.

Source

(IQA) Object that is available for building query definitions. Sources include both business objects and query objects. Query definitions can be created based on one or more sources.

Source query

The original query or business object that a new query is run from.

Split gift

A gift or pledge that is distributed among more than one fund or that is split within a fund.

Staff site

Offers staff an easy, cloud-based, convenient way to manage association business from the web. Staff can complete transactions and updates for contacts, assist in renewal, registration, and purchasing. The site also allows staff users to run reports, create and manage events, and utilize the robust RiSE tools.

Standard invoice

Document issued by a seller to a buyer detailing goods and services sold. Also called a bill of sale or contract of sale, it identifies the trading parties, the assigned invoice number, and the invoice date. It also lists, describes, and quantifies the items sold, shows the date of shipment and mode of transport, lists prices and discounts (if any), and shows delivery and payment terms.

Standard program

A standard program has no maintenance or rotating period. The student is required to complete only one initial set of requirements to achieve certification.

Standard report

Pre-set iMIS report formats including rosters, labels, and statistical reports. Most standard reports allow you to select which records you want, and most let you override the sort order. However, you may be limited to the amount of control you have over the format or layout of the report.

Stock item

A product marked as a stock item allows tracking inventory and recording cost of goods sold, inventory, and accounting entries.

Subscriber

Individual, either customer or non-customer, who has purchased a product of a cyclical nature having a fixed term which can be renewed or repurchased upon term expiration.

Subsidiary ledger

A ledger that contains a group of related detail accounts whose total is shown in a controlling account in the GL

Subsidiary ledger

A record of the details to support a general ledger account (control account). For example, the accounts receivable subsidiary ledger provides the details to support the balance in the general ledger control account Accounts Receivable.

System administrator

A user with complete access and privileges

System role

Used in claims-based security. System roles include:

- Non-authenticated user: A user who has not logged in
- Authenticated user: A user who has logged in
- System administrator: A user with complete access and privileges

Tag

Keyword or category name used to classify website information.

Tagged list

An iPart which aggregates content pages that contain specified tags and satisfy other defined criteria into a display list. The tagged list definition includes an association with a tagged list format that defines how the aggregated content will be displayed.

Tagged list

Listing of content tagged with a specific keyword and, optionally, related tags.

Tagged list format

An iMIS definition object that contains information for how a tagged list iPart should display details for each content page that is displayed by the tagged list.

Tagging

When a content author tags a content page, the tag is added to the metadata for the content page and to the website's search index. This facilitates the inclusion of the content page in website searches and tagged lists displayed on other content pages.

Tagging hierarchy

Visual means of displaying relationships between content tags.

Target contact

The person on whose behalf you are performing an action.

Tax authority

A jurisdiction or geographical area to which a set of specific taxing rules apply.

Tax category

General collection of items that have common taxation rules.

Tax schedule

All tax authorities that apply to particular situation (such as the purchaser, the location, the item class, or the individual item) and the order in which taxes are calculated when more than one tax applies.

Ticket

Preprinted slips of paper that a registrant receives in advance for each function he or she is registered to attend. You can use tickets to control and track function attendance by restricting admission to ticketed registrants and by using collected tickets to verify attendance.

Tickler

A way to notify a customer that they need to take action on a given activity, such as a call. When a member logs on to iMIS, a display displays notifying them of the action needing to be taken.

Traditional payment

A category of payment instructions that, when processed, will create a brand new payment when the order is fulfilled. Traditional payments include Cash, Check and Credit Card.

Transaction

A record containing information entered by the user to cause a change to a file. This change is any kind of transfer between the accounting entity and an outside party.

Transaction

An event or condition that is recorded in asset, liability, expense, revenue, and/or equity accounts.

Tribute

A gift or pledge made to recognize an individual's service to an organization, cause, or some other entity.

Unearned income

A liability that is recorded when assets are received before the order is fulfilled. Unearned income can be due to

- a payment in advance of products or services being supplied,
- an unidentified payment
- an overpayment
- a duplicate payment
- a return or cancellation of products or services involved in an early pre-paid sale.

Unit of measure

The measurement amount for a product, such as case, each, meter, sheet, pack, or box.

Units

Units are the number value assigned to a component or category in order to measure when the student completes the component or category.

Unposted transaction

Any order, invoice, or payment that has been recorded but remains in a tentative state. While in the unposted state, the transaction can be easily changed or deleted without generating an audit trail of the change.

Upsell

Associates a product with another product as an upsell potential. For example, an exposition may offer other products, such as show directory ads, market research rooms, and sponsorship opportunities. Via such relating, salespeople can view the upsell options available when marketing a specific product.

User-defined field

A method to add metadata to content and to filter search results.

Valuation method

The method used for valuing product inventory. In iMIS, either the average or the standard cost valuation methods can be used. The average valuation method calculates the total cost of goods sold divided by the total inventory on hand as averaged over time. The standard cost valuation method determines the cost of goods sold based on a fixed amount.

Wait list

A list of registrants who are queued in hope of attending a function that has already reached its attendance limit. Wait list members may be allowed to attend the function if the attendance limit is changed, if additional sessions are added, or if other registrants cancel their registrations for the function.

Wait listing

Strategy that allows an exhibitor to be placed on a waiting list to purchase an unavailable booth or other exposition product. Exhibitors placed on a wait list have the opportunity to buy the exposition product when it does become available due to an order cancellation or expansion of the floor plan.

Web components

A RiSE tool that is customizable and configurable for associations; components include website defaults, customized error messages, and organization information

Website

A public-facing, easy to create site that fully utilized iParts and SOA.

Workflow

Automatic processes that are executed without human intervention. Each has an ownership structure, are related to a specific parent object, like an order, complaint, and so on, have a set of tasks that must be executed according to business rules.

Write-off

Removal of the outstanding value of an invoice that is deemed uncollectible or that carries a trivial positive or negative balance. The result of the write-off transaction is to bring the invoice balance to zero. In the case of an accrual invoice, the amount written off is charged against the net income by recording either a bad debt expense or an adjustment to income.

Technical Support

ASI's Technical Support team is a three-time winner of Service and Support Professionals Association's (SSPA) Software Technical Assistance Recognition (STAR) Award and Support Center Practices (SCP) Certification. SCP Certification measures the effectiveness of customer support based on a stringent set of performance standards and represents best practices for the industry.

Technical Support is available to all iMIS customers who are current on their iMIS Software Update Plan (SUP).

You can receive live technical support via the web or telephone, Monday through Friday, during standard business hours. You can submit, monitor, review, and update a technical support request via the web 24 hours a day, 7 days a week. You can also search a database of previously resolved technical issues.

Hours of Operation

North America

Technical Support is available Monday through Thursday from 8:00 a.m. to 7:00 p.m. (CST) and on Friday from 8:00 a.m. to 5:00 p.m. (CST). (512) 491-0550 ext 2

Online resources are available 24 hours a day. Questions submitted after end of business will be addressed during working hours the next business day. Service is not available during company holidays:

- New Year's Day, January 1 or observed holiday
- Memorial Day
- Independence Day, July 4 or observed holiday
- Labor Day
- Thanksgiving Day
- Day after Thanksgiving Day
- Christmas Eve, December 24 or observed holiday
- Christmas Day, December 25 or observed holiday

Also, service is not available one day per quarter to accommodate internal planning sessions; specific dates and times of these sessions are announced in the monthly newsletter available on the Tech Support Community and posted on the Technical Support web page prior to the date of the session.

Asia-Pacific

Technical Support is available Monday through Friday from 9:00 to 17:00. (Australian Eastern Standard Time) Dial extension 2 for Customer Support. +61 3 9869 7500

Online resources are available 24 hours a day.

Europe

Online resources are available 24 hours a day. Technical Support is available Monday through Thursday from 9:15 to 24:00 (BST) and Friday from 9:00 to 23:00. +44 (0)2032 670067

Call Response Times

ASI prioritizes all calls as follows:

- System Down. All resources applied. Immediate initial response, with same to next-day targeted resolution for most issues.
- Inability to Perform a Critical Business Process. All scheduled resources applied. Immediate to ten-minute initial response, with same to next day targeted resolution for most issues.
- General how-to questions and techniques, installation questions and minor product bugs. All scheduled resources applied. Immediate to two-hour targeted initial response.

Requesting Support

To request technical support, browse to advsol.com/support and select Tech Support > Request Technical Support.

Once you submit a technical request support form, you will be given an SMR (Software Maintenance Request) case number and a time frame within which you will receive an e-mail response.

To check the status of or make updates to technical support requests, browse to advsol.com/support and select Tech Support > Check Support Status.

To initially request technical support, you must submit your request online. However, you may call Technical Support for the following:

- To discuss an existing technical support request with an analyst
- To ask questions about services available through Technical Support
- To learn how to submit a technical support request online
- To get assistance with ASI website access issues

Please provide your name, organization name, and SMR (Software Maintenance Request) case number when contacting us.

- TechSupport@advsol.com
- advsol.com/support

Submitting Product Defects and Requests

- Product defects or enhancements are reported and documented by iMIS users. Defects are prioritized and a note on its priority is sent to the call initiator. High-priority items are scheduled for future maintenance releases; however, we cannot guarantee that a particular defect will be addressed in the next release.
- Requests for Enhancements and lower priority defects are reviewed on a periodic basis. Prior to work on each release, all open defects and enhancements are reviewed and prioritized based on potential benefits. Not all reviewed program changes can be chosen for inclusion.

Additional Support Services

- Problem Escalation procedure for calls outstanding over one week are escalated to a senior analyst for concentrated research
- Known problem documentation, workaround procedures, and updates when product defects are prioritized and fixed
- Monthly Technical Newsletter available on the Tech Support community
- Product notification and availability of web releases
- Current product release maintenance on website
- Database search availability of reported incidents via website
- Tech Alert notification for serious and urgent product problems

What Support Cannot Cover

- Live or phone-based training, business analysis, and system setup (contact your AiSP or ASI)
- Implementation and conversion (contact your AiSP or ASI)
- Programming of enhancements (contact your AiSP or ASI)
- Weekend or after-hours support
- Questions about non-iMIS software, hardware or peripheral problems, or database administration (contact product vendor)
- Product pricing and pre-sales questions (contact your AiSP or ASI)
- Unsupported versions of iMIS
- ASI beta products (contact ASI Product Management)
- Specialized query or report writing (contact your AiSP or ASI)
- Data corruption analysis and repair that has occurred with prior releases (contact your AiSP or ASI)
- Support for 3rd party add-on and products not listed in a supported products and environments statement

  ASI does not grant access to the Technical Support site for individuals that are serving as outside consultants or working temporarily for our customers. All support cases will only be communicated from Tech Support to either an iMIS customer or an ASI Authorized Solution Provider. Customers wishing to include any other outside consultants on conference calls and communications may do so at their discretion.

Non-Plan Services

The following services are available to all iMIS customers regardless of their iMIS Software Update Plan status.

Training

ASI offers a wide range of training courses designed for new and experienced users. Classes are held on a regular schedule at ASI offices worldwide, and at other locations based on demand. Training can also be customized to your specific needs. To register for any iMIS course, choose from these options, according to your location:

North America

- Register online.
- Fax your registration form to (703) 739-3218 or mail to ASI Training, 901 North Pitt St., Suite 200, Alexandria, VA 22301
- E-mail your registration information to training@advsol.com.
- If you do not see a class that you wish to attend listed in the timeframe or location that you desire, please e-mail training@advsol.com.

Asia-Pacific

- Download a full schedule and registration form.
- Fax your registration form to ASI at +61 3 9629 5919 or mail to ASI at Level 22, 459 Collins St, Melbourne, 3000, Australia.
- E-mail your registration information to training@advsol.com.
- If you do not see a class that you wish to attend listed in the timeframe or location that you desire, please contact your Customer Care Manager or e-mail training@advsol.com.

Europe

- ASI Europe can provide training on demand, customized to your specific needs. To learn more, e-mail training@advsol.com.

Consulting

ASI and its AiSPs all deliver a comprehensive array of consulting services to existing iMIS customers. These include iMIS system audits, custom report creation, website design, and more.

To learn more about consulting services in North America, contact your AiSP or ASI; in Europe and Asia-Pacific, contact ASI.

User Groups

NiUG, the International iMIS User Group, is the largest independent, not-for-profit, volunteer-run user group. Consisting of hundreds of company members, NiUG sponsors an independent, non-commercial list serve for all iMIS users, solution providers, vendors and ASI employees, which is a forum for discussing iMIS and iMIS-related issues. Regular (Organization) membership dues are based on how many licensed users the organization has for iMIS; Associate and Vendor member companies may join, but they are not able to vote; moreover, vendors do not have access to the NiUG listserve.

In addition to the ability to acquire abundant free technical advice via its list serve in a peer-to-peer format, members can get a discount on a number of iMIS-related products and services. NiUG also holds conferences three times a year at various locations throughout North America.

For more information, visit NiUG: niug.org

Webcasts

ASI offers a variety of product-related webcasts on a regular basis. To participate, all you need is access to a phone and a dedicated internet connection. You view the presentation through the internet and call a special toll-free number to hear the audio presentation and participate.

To view the latest schedule, visit Webcasts: advsol.com/webcasts

Discovery Conference

The Discovery Conference is an annual event bringing together the entire iMIS community of customers, AiSPs, ASI staff, and ASI business partners. Separate Conferences are held in North America, Europe, and Asia-Pacific.

This conference is a great opportunity to learn about the latest advances in iMIS, collaborate with fellow users of iMIS, and give feedback directly to the producers of the iMIS

solutions. In addition, it is an excellent opportunity to learn about complementary solutions offered by ASI's business partners.

For more information, visit NiUG: niug.org

Software Updates

All production and maintenance releases of iMIS are made available to SUP members.

iMIS production releases take advantage of technological advances as well as incorporate new features based on feedback from the entire iMIS community of users. The iMIS community is comprised of more than 30,000 people, from over 10 countries, representing a wide variety of non-profit organizations as well as AiSPs and ASI staff.

iMIS production releases are available for download. iMIS maintenance releases address important product issues between production releases; they are available for download.

To access the latest iMIS releases, visit Product Releases: advsol.com/productreleases.

Contacting ASI

Contacting Customer Support

To submit general questions, provide feedback, or voice concerns, please contact the Customer Contact Center. All requests receive a response within one business day.

For customer service,

call 512-491-0550, option 5

e-mail CustomerContactCenter@advsol.com

Contacting ASI Offices

ASI United States

1-800-727-8682

info@advsol.com

Browse to advsol.com/usa

ASI Europe

0207 194 7972

info-eu@advsol.com

Browse to advsol.com/europe

ASI Canada

(800) 727-8682

info@advsol.com

Browse to advsol.com/canada

ASI Asia-Pacific

+61 3 9869 7500

info_aust@advsol.com

Browse to (advsol.com/ap

Subscribing to iNSIGHTS

iMIS iNSIGHTS is a monthly e-newsletter filled with news, tips and tricks, technical information, training and event notices, and more. This free service makes it easy to stay current with iMIS changes and build up your product knowledge.

To subscribe, e-mail insights@advsol.com.

Online Resources

Online resources are available to SUP members. To access online resources, you must obtain a user name and password.

- To obtain a user name and password, browse to advsol.com/register.

Support Community

ASI Technical Support maintains an online community with technical documentation, articles, and updates. Through this online community, you can also access product releases, sample reports, and database maintenance scripts and utilities.

- Browse to advsol.com/support and select Tech Support > Tech Support Community.

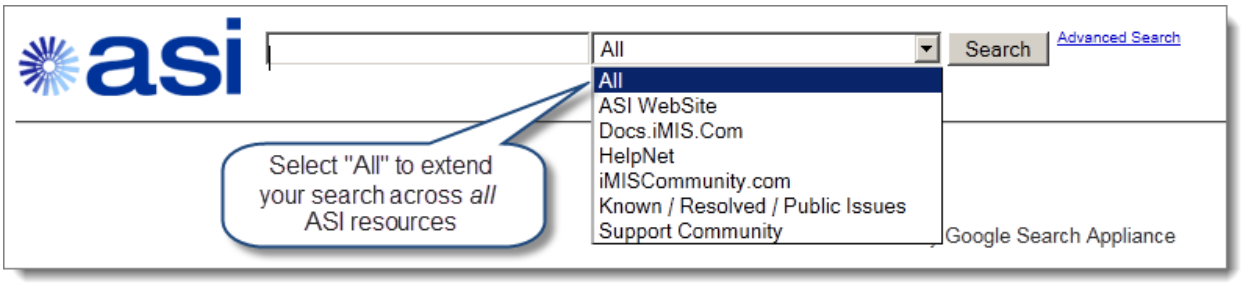
  iMIS Community

  iMIS Community facilitates the collaborative development of iMIS applications and solutions among the customers, partners, and developers of Advanced Solutions International. Make use of this extensive resource for help with iMIS implementation and development projects.

- Request access: imiscommunity.com/contact
- iMIS development: imiscommunity.com/sdk_center
- Documentation downloads (Word versions of Helpsite content)
- Schema documentation (Database reference)
- Business Object Designer (BOD)
- Database utilities
- iParts Registry
- Payment Gateways
- Technology previews: imiscommunity.com/previews
- Shared projects and solutions: imiscommunity.com/collaboration_center
- Forums: imiscommunity.com/forum

  Google search for iMIS

  ASI offers powerful information searching through a custom Google Search Appliance. Google Search gives you a single place from which to access information from one or all of ASI's sources: user documentation, developer postings, support issues, and community areas.



- Browse to advsol.com/support and select Tech Support > Google Search.

  Support Issues Search

  You can view real-time listings of software issues for each release. You can search resolved issues and known issues, by release version.

- Browse to advsol.com/support and select Tech Support > Search Issues.

  Knowledgebase Search

  You can access the powerful iMIS Knowledgebase online. This tool allows you to search the entire library of online resources, including HelpNet discussions, previously resolved technical issues, and other product and technical information.

- Browse to advsol.com/support and select Tech Support > Search Knowledgebase.

  Help and Documentation

  You have unrestricted access to the iMIS Helpsite, which provides the latest documentation for online browsing and searching; corrections and additions become available immediately.

  The Helpsite also includes downloadable, print-ready references that pull together comprehensive information and appendices on each feature set; they remain available on the Helpsite, so you do not have to log in to HelpNet for documentation.

- Browse to advsol.com/support and select Documentation, and follow the ordering link that appears under iMIS 20 Documentation.

  HelpNet Community

iMIS HelpNet is an online self-service community devoted to empowering you to solve your own issues and develop application expertise. iMIS HelpNet hosts a discussion forum where you can post questions to the entire iMIS community of users, Authorized iMIS Solution Providers (AiSPs), and ASI Staff as well as search previous discussion threads.

HelpNet also contains archives of iMIS 10 and 15 documentation, including user manuals, release notes, and installation instructions.

- Browse to advsol.com/support and select Tech Support > HelpNet Community.

Customer Support

Software Update Plan Services

Advanced Solutions International (ASI) values lifelong customer relationships. This is why we focus on providing customers with all the tools and resources necessary to keep iMIS forever. The decision to purchase iMIS is an investment in your organization's future, and the iMIS Software Update Plan lets you maximize and protect that investment.

Plan members receive access to industry-leading online resources, award-winning and certified technical support, and regular software updates.

For more information on the iMIS Software Update Plan (SUP):

- Browse to advsol.com/sup
- Contact: softwareupdateplan@advsol.com

Basics for Members

With iMIS, your organization can provide a member website so your customers or members can manage their own accounts, register events, purchase products, pay membership dues or subscriptions, and submit donations.

Directory

- find users
- find committees

Events

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

Store

- purchase products
- search for products
- review shopping cart

Donate now!

- submit online donations

My Account

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

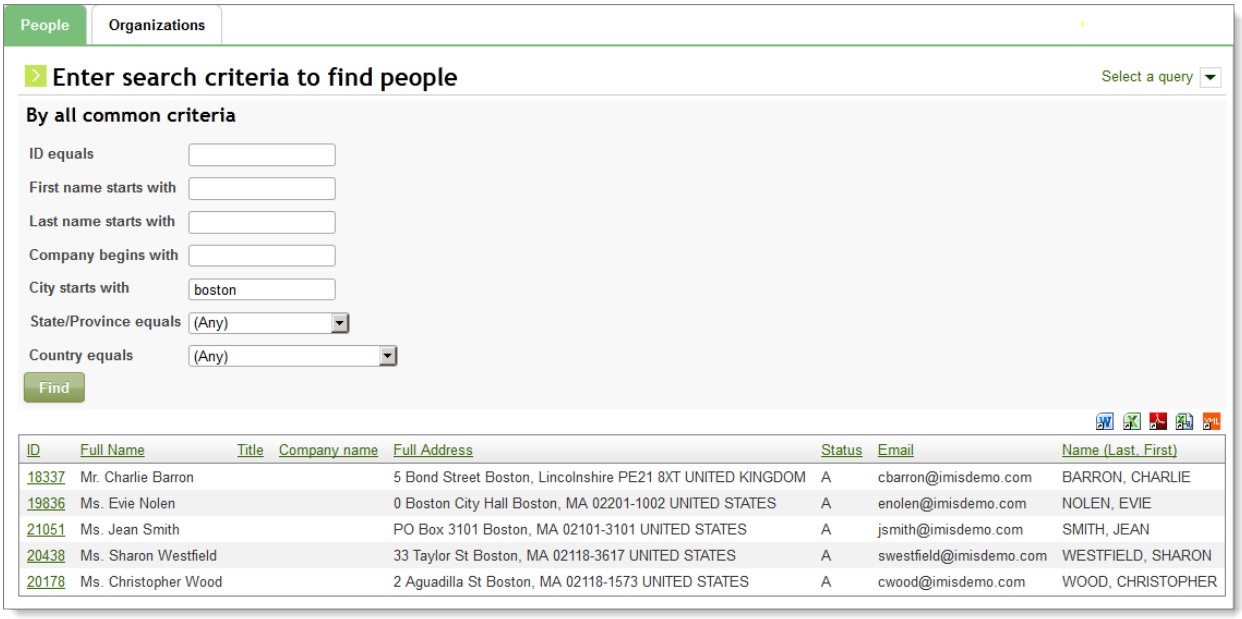
-
-

Managing contacts and relationships

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

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

We cover some basics here. The reference documentation for Contacts covers the things you can do to manage contact data with iMIS.



Contact records contain information about names stored in your database

Creating contact records

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

To enter a contact

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

Finding contact information

You can look up records using the Directory tab.

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

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

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

To update contact records

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

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

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

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

   Example: Completing a name change

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

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

Viewing additional contact information

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

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

As a Casual user, you can pay your outstanding dues online using the Billing link and view other members order history using the Orders link, but you'll find that you cannot

view dues payment information or answer other billing-related questions for other contacts.

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

To view recent activities

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

   The contact's recent purchases, attendance at conferences, and other information appears.
5. If the list of Activities is quite long, select a code from the Filter the activity log by list.

To create call activities

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

To view recent transactions

1. Log on to the iMIS site and go to the Contacts tab.

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

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

   To assign a new logon or password for a contact

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

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

- If you want to create a new logon but leave the password the same, enter the new logon and click Save.
- If you want to change the password but keep the logon the same, enter their current password, and then enter the new password twice to confirm, and then click Save.

Working with external contact lists

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

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

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

- Import Utility – opens the Import Utility window, where you can import data into the iMIS database. (Requires licensing for the Import Utility.)

Managing events

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

Registering attendees

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

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

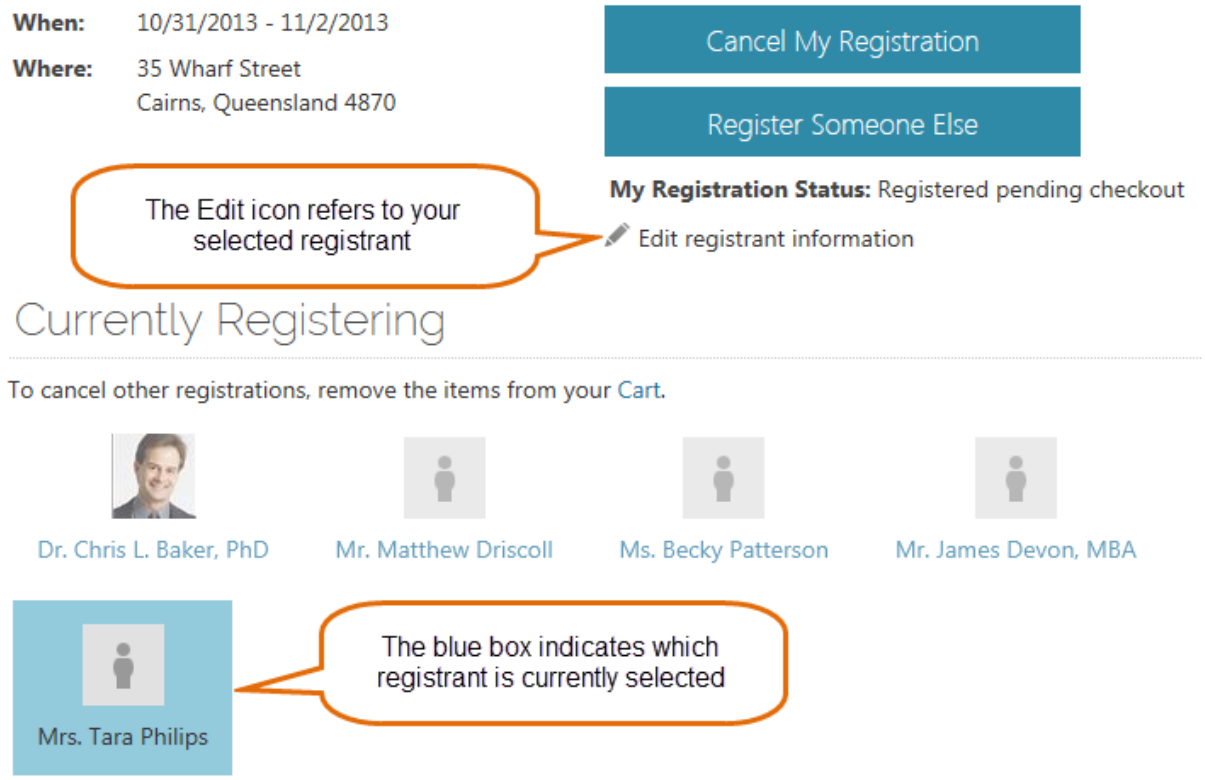
For cancellations, as a Casual user you cannot cancel event registrations.

To register people for an event

1. Logon to your site.
2. Select Events.
3. From the Event list, select your desired Event.
4. Click Register or Register Someone Else button.

   If there is no button, tell your iMIS administrator that the Event is not allowing registrations for someone else.

   If you select to register someone else, a list of coworkers will display.
5. Click the Edit icon to verify the address of your registrant.



6. Select your desired event functions.

- Click on the event function group headings to expand and collapse the group sections.
- Choose a function by clicking Add.
- Functions set up for automatic enrollment do not have an Add link.

- You will know that you have been added to the event function when In Itinerary appears next to the function name.

7. Your Cart will contain all of your registration checkout details.

   Review the Shipping and Payment Information and then click Submit Order.

   An Order Summary page appears that you can print if needed.

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

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

   To cancel an event registration with a cancellation fee

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

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

   A system message prompts you to verify the cancellation of the registrant.

4. Click Yes.
5. Click Edit.

   A message prompt is displayed.

6. Click Yes.
7. Select the Cancellation Fee product from the Function list.

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

To cancel an event registration with no cancellation fee

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

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

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

Helping with events

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

Offering registrations on the web

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

Scheduling sessions

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

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

Registering attendees from your company

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

Tip: Check the carousel beneath the registration buttons to see which contact is currently selected.

Reporting tools

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

To run a standard report

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

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

NRDS

With the NRDS bridge for data synchronization, National Association of REALTORS® clients can better manage the information shared between iMIS and NRDS through an automatic synchronization of changes made in either database. This process runs in the background as a scheduled task. You also have the option to manually synchronize specific records at any time.

How it works

iMIS polls NRDS on a regular basis to see if there have been any data changes. If a change is found, it is placed in a queue for processing. The queue is processed every time the NRDS scheduled task is run, according to the frequency and batch size you define. This same process also looks for changes in iMIS and sends that information back to NRDS. If three timeout errors occur in a row during this exchange, the process stops, but all remaining records stay in the queue. These are processed the next time the scheduled task is run. If any other problems occur during this transfer, the item is removed from the queue and an error message is added to the NRDS log. By default, NRDS changes are brought into iMIS first, before iMIS changes are pushed to NRDS.

In addition to the automatic updates, you also have the option to synchronize data for a specific member or office on-demand using the NRDS Sync Buttons and NRDS Sync By ID iParts. These iParts are helpful when you need to synchronize data immediately, instead of waiting for your scheduled task to run.

Data shared between NRDS and iMIS

All of the data shared between NRDS and iMIS can be accessed through iParts, user-defined windows, queries, and reports. The following table defines the data types shared between NRDS and iMIS.

Note: If you have any custom NRDS tables that you use for iMIS queries, reports, special pricing, or billing, update those items to use the new AsiNrds tables described below.

NRDS tables	iMIS user-defined tables	iMIS business objects
Member	Broken up into AsiNrdsMember and	CsAsiNrdsMember and

	AsiNrdsMemberDesignation	CsAsiNrdsMemberDesignation
Member Supplemental	AsiNrdsMemberSupplemental	CsAsiNrdsMemberSupplemental
Member Demographic	AsiNrdsMemberDemographic	CsAsiNrdsMemberDemographic
Member Education	AsiNrdsMemberEducation	CsAsiNrdsMemberEducation
Member Financial	AsiNrdsMemberFinancial	CsAsiNrdsMemberFinancial
Office	AsiNrdsOffice	CsAsiNrdsOffice
Office Supplemental	AsiNrdsOfficeSupplemental	CsAsiNrdsOfficeSupplemental
Association	AsiNrdsAssociation	CsAsiNrdsAssociation

Data restrictions

Multi-instance tables: When you make changes to the NRDS data stored in iMIS, keep in mind that NRDS does not allow you to add, update, and delete all data. So while it might be possible to update something in iMIS, changes that NAR does not allow will be reverted the next time the record changes in NRDS. NAR has rules for the following multi-instance tables:

- You can add, update, and delete data from the Education and Demographic tables.
- You can add and update (but not delete) from the Supplemental tables.
- You can only add to the Financial table.

Point of Entry status: There are also restrictions on what you can update based on your Point of Entry status for a member or office. If you make changes to a record you are not authorized to edit, this will be overwritten when you synchronize from NRDS. You may also get a partial success error in your log after a synch. Contact NAR if you have questions about your Point of Entry status for a particular record.

Field length: If you notice that certain iMIS fields are truncated after synchronizing from NRDS, it is possible that the iMIS field has a different maximum field length than the NRDS field it is mapped to.

New NRDS contacts: If you manually create a new NRDS member or office in iMIS, you must fill out the required fields in the NRDS tables according to the NRDS requirements before synchronizing the new record to NRDS. Contact NAR if you have questions about the required fields. For more information, see Adding new NRDS contacts and supplemental memberships from iMIS.

Associations: Association panels are read-only in iMIS, because association records are only allowed to be updated from NRDS. Any changes you make to an association in iMIS are overwritten during a regular synchronization.

NRDS bridge setup and configuration

To start using the NRDS bridge, you must do the following:

- Install the WebSphere MQ Client and use the iMIS DB Maintenance Utility|topic=DB Maintenance tabs to create the required NRDS pieces.
- Configure the NRDS Bridge with the NRDS host credentials and map the NRDS fields to iMIS fields.
- Set up windows to view and edit the NRDS data.

Important: You must set up and configure the NRDS bridge before you can synchronize any data.

Note: If you plan to set up a test database before implementing NRDS in your live system, contact NAR first to obtain connection information for their test database, so that you do not update any live data while testing.

To install the NRDS foundation

1. Download and install the free IBM WebSphere MQ Client on your iMIS application server.

   Tip: After unzipping the WebSphere MQ Client zip file, open the Windows folder and run setup.exe.

2. Restart your application server.
3. From the Start menu, go to the iMIS program group and run the iMIS DB Maintenance Utility|topic=DB Maintenance tabs tool.
4. Enter your database connection information.
5. From the Options tab, click Add NRDS Items.
6. Check the Output section below the button to verify that no errors occurred.

To configure the NRDS feature

1. Add the NRDS configuration page to your website.

- From Content designer > Manage content, create a new content record and add the NRDS Configuration iPart (located in the Utility folder of Content Gallery).
- Configure the iPart as desired, then Save & Publish the content record.
- From Site designer > Manage sitemaps, select a website from the dropdown list.

  Note: You can select any WCM website or your staff site.
- Create a new Website Navigation Item.
- For the Content or URL to Link to, select the NRDS configuration content record you created.
- Save, and then Publish the navigation item.

2. From the configuration page, enter your NRDS host credentials and map the NRDS fields to iMIS fields. The mapped fields are automatically updated when iMIS and NRDS are synchronized.

   Note: The following fields are automatically mapped and cannot be edited from the configuration page: name fields (including Prefix, First, Middle, Last, and Informal/Nickname), Gender, Birthdate, Title, Join Date, and CO_ID (for members if the primary office record is in iMIS or for offices if the parent office or association record is in iMIS).

- Navigate to the NRDS configuration page you created.
- Click the edit icon.
- In the NAR Host Credentials section, enter the NRDS host credentials provided to you from NAR, so that iMIS can connect to NRDS.
- For each NRDS field listed in the Member, Office, and Association field mappings sections, specify which iMIS field you want to map it to, or leave it blank if you do not want to synchronize the data with a standard iMIS field.
- Member type fields: Enter the iMIS customer types that you want to map to the NRDS member types. You can map the NRDS member types to a single iMIS customer type or to multiple types using a comma-separated list (e.g. M,IM). In addition, note the following about the Member, Office, and Association member type sections:
- Member type mappings: For each NRDS type listed, you can specify one or more member types or member type-category combinations. For example, to map the NRDS Realtor type to the iMIS Member type (M), enter M. If you would also like to map that member type to a category (for example, Cat1), enter M-Cat1. In this case, when a new realtor is synchronized from NRDS, it will be marked as a Member in Cat1.

  Multiple NRDS types can be mapped to the same iMIS type if needed. For example, if you do not use customer types to keep track of whether or not a member is a Realtor or a Designated Realtor, then you can map both of those NRDS fields to the same iMIS customer type.

  You can map a NRDS member type to multiple iMIS customer types and categories using a comma-delimited list. If multiple types and/or categories are listed, then all of the listed values are considered a valid mapping and are not overwritten in iMIS when a record is updated from NRDS. For example, you may have three types of Designated Realtors defined in iMIS (DR, DR2 and DR3) and two related categories (Cat2 and Cat3). For the Designated Realtor type in this case, enter DR,DR2-Cat2,DR3-Cat3. When a new Designated Realtor is added to iMIS from NRDS, they are assigned to the first item in the list:

DR. If you then change that person in iMIS to DR2 instead and add them to Cat2, those changes will not be overwritten when the record is updated from NRDS.

- Office member type: This field is required and must be unique. None of the other NRDS member types can be mapped to the iMIS customer type listed here.
- Association member type: This field is required and must be unique. None of the other NRDS member types can be mapped to the iMIS customer type listed here. If you do not synchronize association records, you can enter text that is not a valid iMIS customer type, such as N/A or XYZ.

  Note: Customer types are set up in iMIS. Go to Desktop > Customers > Set up module > Customer types. Categories are defined in the CATEGORY table. Go to Desktop > Customers > Set up tables > General lookup/validation.
- Member, Office, and Association status mappings: Enter the iMIS statuses that you want to map to the NRDS statuses. You can leave a status field blank, if you do not want to automatically map a NRDS status to an iMIS status. For example, you may not want to mark a record for deletion in iMIS if it is terminated in NRDS.

  While not required, we do recommend mapping each NRDS status within an area (member, office, or association) to a unique iMIS status. By default, the available iMIS statuses are A (Active), D (Marked for deletion), I (Inactive), and S (Suspended). You can define additional values in the MEMBER_STATUS table. Go to Desktop > Customers > Set up tables > General lookup/validation.
- Branch to category mappings: (for Office records only) Enter the iMIS categories that you want to map to the NRDS categories. The categories available in iMIS are defined in the CATEGORY table. Go to Desktop > Customers > Set up tables > General lookup/validation.
- NRDS ID: You have two options for mapping the NRDS ID. The option you select for the Member NRDS ID is also applied to
- ImisId: Select this option if you want to use the ID sent from NRDS as the iMIS ID. If you select this option, you must disable the Auto Assign Member Numbers option. Go to

Desktop > Set up module > General > Basic Options).

- MajorKey: Select this option if you want to save the NRDS ID in the contact record's Major key field. This allows you to maintain your iMIS ID numbering scheme and provides an alternative way to find NRDS contact records. The Major key field is displayed in Desktop > Customers > Manage customers > Profile tab. You can also display this value in any query or report. To change the label displayed for this field, edit the Major Key Prompt. Go to Desktop > Customers > Set up module > General > Basic Options.
- NRDS ID prefix: Enter a value if you want to add a prefix to NRDS member and office IDs. For example, you might want to add different prefixes to the member and office IDs so that you can easily distinguish between them, such as M and O.
- Addresses/phones/fax/email fields: Select the iMIS address type that will store the corresponding NRDS data. The iMIS options available in the dropdown lists are drawn from two places: the three main iMIS address types (labels are defined in Desktop > Customers > Set up module > General > Address and Notes) and any additional address types defined in the ADDRESS_PURPOSE table (Desktop > Customers > Set up tables > General lookup/validation). For phone numbers and email address, you have an additional option to save the value in the Name Table, which displays as part of the contact's main record.

  Note: You can only record one phone number and address per each iMIS address type available in the dropdown lists. For example, you cannot map both the Home phone and Cell phone to the Home Address type. Each must be mapped to a unique address type.

  Caution: You can set up iMIS so that changes to a company address flow down to employee records; their primary address is automatically updated to match the parent company's address. In this case, a change to the address of a NRDS office triggers an update to the address of each NRDS member on the office's roster, which is then sent to NRDS during the next scheduled synchronization. If you are concerned about that automatic update, you can turn this feature off. Go to Desktop > Customers > Set up module > General > Advanced. Select the checkbox for the option Disable Auto Flow Down of company address Information.

Caution: If you have set up iMIS so that the phone numbers, fax number, or email entered on the main contact record (the Name Table) flow down to an address type (the target), then you should not map a NRDS phone, fax, or email field to that target address type. For example, if the iMIS Home Phone is set up to flow to the Home Address, then you should map the NRDS Home Phone to the Name Table, and not to the Home Address. Otherwise, it is possible that changes synchronized from NRDS will be overwritten in iMIS. This setting is defined in Desktop > Customers > Set up module > General > Address and Notes > Synchronize Phone Numbers & Email section.

- Post sync stored procedure: If your organization needs to apply any special business rules after a member or office is refreshed from NRDS, then you can specify the name of the iMIS stored procedure to run after each synchronization from NRDS in this field. Only one stored procedure can be entered.

  Tip: Write the stored procedure to take a single parameter of @imisId, so that it can be run for each member and office after a synch from NRDS.

Setting up iMIS to view and edit NRDS data

You can view and edit the NRDS data in two ways: from iParts added to a website or from Desktop. However, the ability to synchronize data for a specific office or member on-demand is only available in an iMIS content management website or your staff site, where you can add the NRDS Sync Buttons and NRDS Sync By ID iParts.

To view and edit NRDS data from an iMIS website

Because iParts, content records, and navigation items are so flexible, there are numerous ways that you can set up your NRDS pages. We recommend the following setup, but you can adjust any of these steps as needed for your organization.

Go to RiSE > Content Designer > Manage content:

1. Create the NRDS content records:

1. Create a new Website Content Folder named NRDS.
2. Inside the NRDS folder, create the following four content records:

- Member Profile

  Add three iParts:

- Contact Name
- NRDS Sync Buttons
- Panel Collection Editor

  In the iPart configuration, enable the option to Select individual panels and then select the following panels:

- NRDS Member
- NRDS Member Designation
- NRDS Member Demographic
- NRDS Member Education
- NRDS Member Financial
- NRDS Member Supplemental
- Office Profile

  Add three iParts:

- Contact Name
- NRDS Sync Buttons
- Panel Collection Editor

  In Configuration, enable the option to Select individual panels and then select the following panels:

- NRDS Office
- NRDS Office Supplemental
- Sync By ID

Add one iPart: NRDS Sync By ID

- Sync Log

  Add one iPart: Query Menu

  In the Source query or folder field, click select. Select the $/NRDS/NrdsLog query. If you want to make changes to this query, we recommend that you make a copy of the query and use the copy instead.

2. Edit the Member Profile and Office Profile content records to create the following connections in both:

- Create a connection from the NRDS Sync Buttons iPart to the Panel Collection Editor iPart:

1. Click Connect in the NRDS Sync Buttons iPart title-bar menu.
2. Click Create a new connection in the Connect New NrdsSyncButtonsCommon box.
3. In the Object Consumer dropdown list, select the Panel Collection Editor iPart.
4. Click Connect.

- Create a connection from the Panel Collection Editor iPart to the NRDS Sync Buttons iPart:

1. Click Connect in the Panel Collection Editor iPart's title-bar menu.
2. Click Create a new connection in the Connect New PanelCollectionEditorCommon box.
3. In the Object Consumer dropdown list, select the NRDS Sync Buttons iPart.
4. Click Connect.

3. Add the NRDS navigation items.

   Go to RiSE > Site Designer > Manage sitemaps:

- Select your website from the dropdown list.
- Select New > Website Navigation Item to create a new navigation item at the root of your site titled NRDS.
- (Access Settings tab) Choose how you want to restrict access to the NRDS area, so that it never shows up to public users. For example, you can restrict access only to Staff (a Member Type).
- With the NRDS navigation item selected, create four navigation items linked to the NRDS content records (Member Profile, Office Profile, Sync By ID, and Sync Log). You can also restrict access to these pages from the Access Settings.
- Move the NRDS Configuration navigation item under the NRDS node.

4. Edit the Member and Office panels, if needed.

- From NRDS > Member Profile and NRDS > Office Profile, select the tab you want to edit.
- From the dropdown list, choose Design.
- In the Design window, you can change the Panel name and edit the fields displayed. For more information about working with panels, see Panels and custom data.

5. From the new NRDS pages, verify that you can view NRDS members and offices. Use On-Behalf-Of to select a contact.

   Tip: The member or office data displayed in the NRDS panels is based on the value of the ID URL parameter or the On-Behalf-Of selection.

   To view and edit NRDS data from Desktop

1. Open Desktop > Customers > Manage customers.
2. Right-click the Detail tab area (top-right) and select Edit Tab Preferences.
3. From the Other available Detail tabs list, select the eight NRDS tabs.
4. Click the left-arrow icon to move those tabs to the Visible Detail tabs list.
5. Click Save and then restart iMIS for the changes to take effect.

Synchronizing data between NRDS and iMIS

You can synchronize data between NRDS and iMIS in the following ways:

- Initial: Run the initial synchronization to pull over NRDS data for offices and members into the iMIS tables.
- Scheduled: Create a scheduled task to regularly synchronize updated office and member data.
- Command line: Synchronize data for offices and members using a command line if you need to update NRDS data immediately.
- On-demand: Synchronize data for a particular office or member as needed using iParts.

This section describes how you can set up these synchronization types.

Important: For an iMIS contact to sync to NRDS, it must have a NRDS ID.

Note: Before synchronizing NRDS data, you must set up and configure the NRDS bridge in iMIS. Also verify that you have defined the default Customer Type to use when creating new customers and organizations online (defined in RiSE > Set up web components > Quick setup).

To run the initial synchronization between NRDS and iMIS

Before scheduling your routine data synchronization between NRDS and iMIS, you must run the initial synchronization that pulls all of your NRDS members and offices into the new iMIS tables. This process can take several hours, depending on the number of records you bring over. We recommend that you run the initial synchronization at night or over the weekend to limit potential performance problems on your application server while it runs. After the initial process completes, only members and offices that have been modified are synchronized when you run the scheduled task or the command line application.

Tip: Be sure to run your index maintenance plan|topic=Reorganizing and rebuilding database indexes regularly first to get the best possible performance during the initial synchronization.

1. If you used the old NRDS system in iMIS, use the legacy NRDS Importer to do a final batch upload so that everything is up to date in NRDS.
2. Select the batch files to be used for the initial synchronization:

- From NRDS, select Batch Refresh to create a set of batch files that contain all of your NRDS records. Choose the option to create tab-delimited files. When complete, NRDS will email a zip file of these records to the association Point of Entry.
- (optional) If you need to manage state and local associations in iMIS, then download that file also. From NRDS, select Batch Refresh, answer the delimiter question, then click Create File of State and Local Association Directory.
- Unzip the NRDS batch files onto your iMIS application server. Each file is named with your association ID followed by the word FULL (i.e. 0123FULL), but they all have different file extensions followed by a couple numbers. You must have seven [ID]Full files:
- [ID]FULL.m00 – Members
- [ID]FULL.n00 – Member supplemental
- [ID]FULL.o00 – Offices
- [ID]FULL.p00 – Office supplemental
- [ID]FULL.e00 – Education
- [ID]FULL.d00 – Demographic
- [ID]FULL.f00 – Financial

  Note: If you downloaded the optional state and local association directory, then unzip that file in the same location: [ID]ASSN.a00.
- Using a text editor, find and edit the Asi.NrdsSync XML configuration file. By default it is located on your application server in C:\Program Files\ASI\iMIS\Net\bin.
- Find the BatchRefreshFileLocation property.

- Edit the value to specify the location of the unzipped NRDS batch files. For example C:\NRDS.

  Note: If you leave this value blank, the NRDS records will be requested directly from NRDS one-by-one. If you have a large database, this process could take several days. We highly recommend that you use the NRDS batch files for your initial synchronization.

3. Run the initial synchronization to pull your members and offices into the new tables:

- Open a command prompt on your application server.
- Change the directory to the iMIS\Net\bin directory:

  cd C:\Program Files\ASI\iMIS\Net\bin

  Note: This path may vary depending on your install location.

- Run the Asi.NrdsSync application with the initialsync command. You have the option to run this process silently in the background, but we recommend that you use the verbose command so that you can monitor the progress and view log details as the process runs.

  Asi.NrdsSync.exe initialsync Verbose

  After this process completes, set up a scheduled task to regularly synchronize data between NRDS and iMIS (described below).

  Note: If you do not use the NRDS batch files for the initial synchronization and encounter a network interruption during the initial synchronization, do not run the initialsync process again. Instead, run an Inbound synchronization only: Asi.NrdsSync.exe In Verbose

  To run a synchronization from the command line

1. Open a command prompt on your application server.
2. Change the directory to the iMIS\Net\bin directory:

   cd C:\Program Files\ASI\iMIS\Net\bin

   Note: This path may vary depending on your install location.

3. Run the Asi.NrdsSync application.

Asi.NrdsSync.exe

Note that you can override the default behavior using the following arguments:

- <type> – Specifies the type of the synchronization. Enter In if you want to synch from NRDS to iMIS. Enter Out if you want to synch from iMIS to NRDS. Enter Initialsync to run the initial synchronization.

  Values: In | Out | Initialsync

- <verbose> – Displays log information while the Asi.NrdsSync task is run. By default, this session is hidden.

  Value: Verbose

  For example, the following command synchronizes members and offices from NRDS into iMIS and displays the command line session, so that you can monitor progress:

  Asi.NrdsSync.exe In Verbose

  To create a scheduled task that regularly synchronizes data between NRDS and iMIS

  The NRDS scheduled task runs in the background and synchronizes data in the following order:

1. Office records inbound from NRDS.
2. Member records inbound from NRDS.
3. Office and Member records outbound from iMIS.

   This synchronization runs in batches. The default number of records included in each batch is 50. Depending on your requirements, you might want to adjust the batch size. For example, a smaller batch size puts a smaller load on your application server's memory. To change this value, edit the Asi.NrdsSync XML configuration file. By default it is located in C:\Program Files\ASI\iMIS\Net\bin. Find the NrdsBatchSize property and adjust the value as needed.

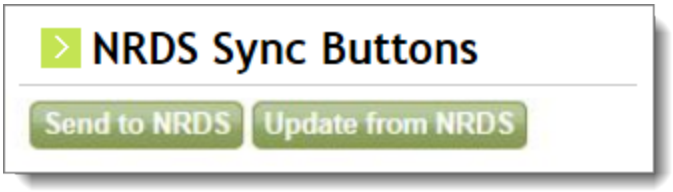
1. From your application server, open the Windows Task Scheduler.

2. Select Action > Create Task.
3. (General tab) Enter a Name and a Description, and select the Security options you prefer.
4. (Triggers tab) Click New.
5. Make your frequency selections based on how often you want to synchronize data between NRDS and iMIS. Click OK.
6. (Actions tab) Click New.
7. For the Action, select Start a program.
8. Browse to and select the Asi.NrdsSync application. By default it is located in C:\Program Files\ASI\iMIS\Net\bin.
9. Click OK to save the task.

To set up on-demand synchronization

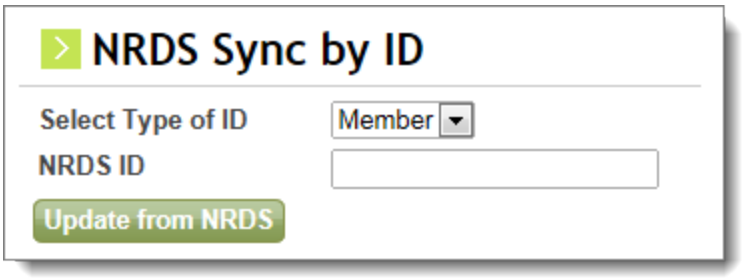
Two iParts are available that you can use to synchronize data on-demand:

- Use the NRDS Sync Buttons iPart to synchronize the currently selected iMIS record. It contains two buttons. Send to NRDS sends iMIS changes to NRDS. Update from NRDS pulls in NRDS changes to iMIS. The buttons are disabled if the selected contact does not have a valid NRDS ID.



Note: The Send to NRDS button is disabled when an association record is selected. Association records can only be updated from NRDS.

- Use the NRDS Sync By ID iPart to update iMIS with NRDS data for a particular NRDS ID. If an iMIS record does not yet exist for the NRDS ID, then a new contact is created.



If you want to set up on-demand synchronization, we recommend that you add the NRDS Sync Buttons to your NRDS Profile content records, so that the iPart can synchronize data for the currently selected contact. You can add the NRDS Sync By ID iPart to any content record.

Adding new NRDS contacts and supplemental memberships from iMIS

To add a new NRDS contact from iMIS

1. Create a new iMIS contact.
2. From your NRDS pages (in either your website or Desktop, depending on where you set them up), add the contact's NRDS data. For iMIS to send this information to NRDS, at a minimum you must enter an office ID for members, or an association ID for offices. In addition, you must also fill out the required fields in the NRDS tables according to the NRDS requirements. If any of the required fields are missing, an error will be added to the NRDS log when the record is synchronized to NRDS. Contact NAR if you have questions about the required fields.

   The record will be sent during your next scheduled synchronization.

   Note: You cannot use the NRDS Sync Buttons iPart to send new contacts to NRDS.

   To add a supplemental membership

1. From an instance of the NRDS Sync by ID iPart, enter the record's NRDS ID and choose whether it is a member or an office, then click Update from NRDS.

   A partial record for the member or office is added to iMIS.

2. From your NRDS pages (in either your website or Desktop, depending on where you set them up), select the Member Supplemental or Office Supplemental data panel.
3. Add a new supplemental record, and enter the supplemental information.

   Note: You must enter all required supplemental NRDS fields. Contact NAR if you have questions about the required fields.
4. If you want to immediately update iMIS with the new supplemental record, use the NRDS Sync Buttons iPart to Send to NRDS. Alternatively, you can wait for the record to be updated during your next scheduled synchronization.

Troubleshooting tips

- In some cases, you might get several errors after running the initial synchronization. These show up in your NRDS log. We recommend that you resolve these errors before setting up your regularly scheduled synchronization task. There are a few steps you can take:
- Run the following SQL on your iMIS database after the initial import to prepare iMIS to access the records directly from NRDS, instead of using the Batch Refresh files:

  INSERT INTO [dbo].[AsiNrdsQueue]

  ([ID], [Direction], [NrdsId], [RecordType], [QueuedDateTime])

  SELECT DISTINCT '', 'Inbound', [NrdsId], [RecordType], GETDATE() FROM [dbo].[AsiNrdsLog] WHERE [Direction] = 'Inbound' AND [Status] = 'Failed' AND [NrdsId] != '' AND [RecordType] != ''
- Run an Inbound synchronization from the command line:

  Asi.NrdsSync.exe In Verbose
- Once the Inbound process completes, check your log. You will have to address any remaining errors individually. These might include validation table errors, date format errors, or other problems. The details of the errors are noted in your log. After resolving the errors for a contact, use the NRDS Sync By ID iPart or the NRDS Sync Buttons iPart to update from NRDS for the member, office, or association.

- If you get a parsing error, then use the NRDS Sync by ID iPart to try to import the record using the NRDS ID.
- If you get an error indicating that a Prefix value is not valid, you might need to add the missing prefix to the iMIS PREFIX validation table. You can do that from Desktop > Customers > Set up tables > General lookup/validation.
- If you get a database connection error when you try to run a synchronization, there might be a problem with your connection credentials. To investigate, open the Asi.NrdsSync XML configuration file. By default it is located in C:\Program Files\ASI\iMIS\Net\bin. Find the DataSource.iMIS.Connection section and verify that the following values are correct for your iMIS database: Data Source (your server), Initial Catalog (your database), User ID and Password (the database credentials).
- If you get an error for a particular record after it is synchronized with NRDS, or if you notice that changes which you made in iMIS are not being successfully saved to NRDS, check the following in the record's data:
- Ensure that you are the Point of Entry or have the proper authority to make changes to the record in NRDS.
- Ensure the record has a status of Active. Changes to Inactive records are not synchronized to NRDS.
- Ensure the data fields meet the NRDS requirements for format, length, and required fields.

Orders Administration

Product Management for Orders

Before using Orders, you first must define product categories and the various products you are going to offer for sale. Product categories must be defined before defining individual products.

If your system is licensed for product kitting, you also can create and offer product kits for sale. Product kits are groups of individual items sold as a single unit.

When defining your products, you will create product codes and enter pricing, accounting, and inventory information. Products and product inventory are managed through the Manage inventory sub-task list, which has three primary functions:

- Defining and managing products
- Entering and editing product inventory receipts, adjustments, and transfers
- Posting product inventory receipts, adjustments, and transfers

Manage inventory sub-task list

Manage products

Select to open the Manage products window used for defining and managing individual products including product codes, titles, descriptions, prices, and other options.

Several other windows important in setting up your individual products are accessed through the Manage products window:

- Special Pricing - Click Pricing on the Manage products window.
- Upsell/Replace - Click Upsell/Replace on the Manage products window.
- Accounting - Click Accounting on the Manage products window.
- Inventory / Warehouses

  Inventory - Click Inventory on the Manage products window. The Inventory button displays and replaces the Warehouses button when Multi-Warehouses is disabled.

Warehouses - Click Warehouses on the Manage products window. The Warehouses button displays and replaces the Inventory button when Multi-Warehouses is enabled.

- Publication Demographics - Click Publication on the Manage products window. The Publication button displays only if the Use Publication Demographics option is enabled on the Set up product categories window for a category to which a product is assigned.
- Web Options - Click Web on the Manage products window.

Enter and edit receipts and adjustments

Select to open the Enter and edit receipts and adjustments window used for managing product inventory.

Post receipts

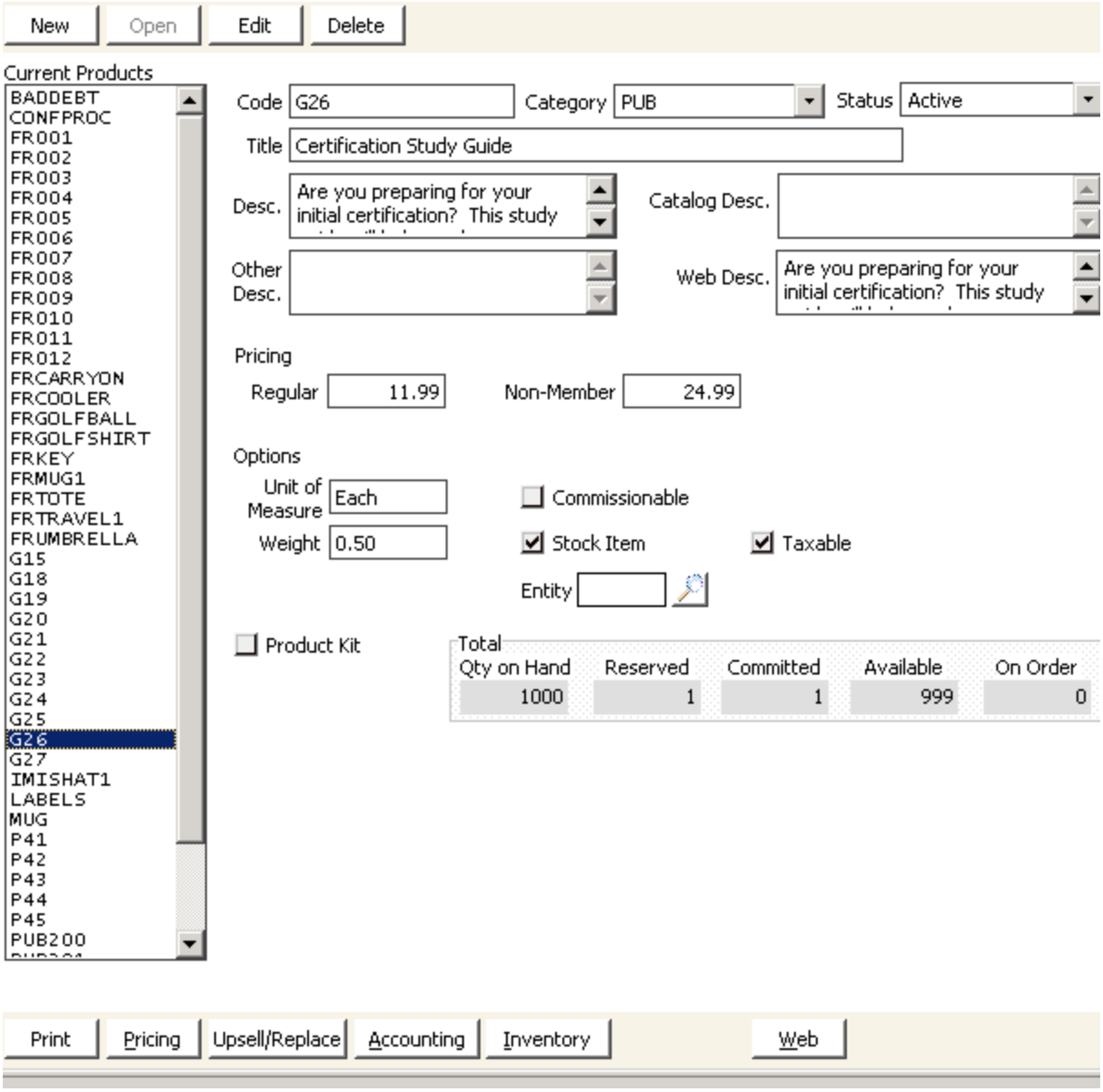
Select to open the Post receipts window used for posting inventory transactions.

Defining products

Before defining your individual products, you first must define your product categories. Product categories are defined on the Set up product categories window (from Orders, select Set up tables > Product categories). For additional information, see Product categories setup.

After defining your product categories, you can define your individual products. Products are defined and managed on the Manage products window, which allows you to enter and access product codes, titles, descriptions, prices, accounting information, and other specific product options. The Manage products window also is used for accessing and displaying product inventory information and for designating a product's Process Manager items.

Enter and edit products window



Admin Console: Home > Commerce > Enter and edit products

Desktop: Orders > Manage inventory > Manage products

Current Products

Lists all of the defined product codes. Select a product code from the drop-down list to view the product's details on the Manage products window.

Code

(required) Enter a specific code for an individual product.

Category

(required) Select a product's category from the drop-down list. Product categories are defined on the Set up product categories window (from Orders, select Set up tables > Product categories).

Status

Select a product's status from the drop-down list. The default status for all new products is Active, and you can assign the following status codes to your products at any time during a product's life cycle:

- Active (A)
- Inactive (I)
- Mark for Deletion (D)
- Not Available (N)
- Out of Production (O)

See Product Status Codes for more on product status code functionality.

Title

Enter a brief, descriptive product title. A product's title displays next to the product's code on windows and reports; product titles can be edited when entering orders.

If the Print 1st Line Desc on Statement option is enabled on the AR/Cash Set up module window (from AR/Cash, select Set up module), the product title entered in the Description field on the Overview tab of the Enter and edit orders window prints on invoices and statements. The product title entered in the Description field also displays on the AR/Cash tab on the Manage customers window and on the AR/Cash Enter and edit cash receipts window. If the Print 1st Line Desc on Statement option is disabled on the AR/Cash Set up module window, only the order number prints on statements and displays on windows.

Description Fields

All description fields hold product descriptions, to a maximum of 5000 characters:

- Desc

  Enter the product description to be seen by staff. The text entered in the Desc field does not appear on printouts, but it will appear on the product's web description if none exists in Web Desc.

- Catalog Desc

  Unused.

- Other Desc

  Unused.

- Web Desc

  Enter the description to display on the Product Detail page; otherwise, the web page uses the Desc text, if any.

  Note: Place key search terms within the first 300 characters of the description. In the Public view, search truncates the description to 300 characters, so only text within that range yields search results for users.

  Pricing

- Regular - Enter a product's default unit price. The price entered in the Regular field will apply for all customers unless you enter a different price in the Non-Member field. You can override a product's default price at order entry.

  The Use Member Pricing option on the Overview tab of the Enter and edit orders window allows you to apply Regular product pricing for non-member customers.

- Non-Member (optional) - Enter a product price for non-member customers. This price applies automatically when you sell a product to any customer with Non-Member status, allowing you to avoid most manual price overrides.

  If the Non-Member field is blank, a product's price defaults to the value entered in the Regular field for non-member customers. You can override a product's default price at

order entry, and the Use Member Pricing option on the Overview tab of the Enter and edit orders window allows you to apply Regular product pricing for non-member customers.

- Fair Market Value (Displays only when the Premium option is enabled) - Enter a fair market value for a product used as a premium. You must enter a value in this field, which can be 0.00. The default value is 0.00.

Options

- Unit of Measure - Enter a product's unit of measure, such as individually, each, foot, yard, sheet, book, or pack.
- Commissionable - Enable if a product's sale generates a commission.
- Comm % - (Displays only when the Commissionable option is enabled) Enter the commission percentage a product's sale will generate.
- Weight - Enter a product's weight. When defining product kits, be sure to enter a Weight. Freight by weight charges will not calculate for a product kit unless a weight has been defined, regardless of whether weight has been defined for the individual kit components.
- Stock Item - Enable to indicate that a product is stored in inventory. When the Stock Item option is enabled, both products in inventory and backorders are tracked in the Qty on Hand, Reserved, Committed, Available, and On Order fields on the Manage products window.
- Taxable - Enable if a product is taxable. When the Taxable option is enabled, iMIS automatically calculates any applicable taxes for a product according to the tax code entered for an order. When defining a new product, the Taxable option on the Manage products window enables by default if the Taxable option on the Set up product categories window is enabled for the new product's category.
- Premium - Enable this option to use a product as a premium for gifts and pledges. This option only displays only if Allow Premiums as Products is enabled on the Fundraising Set up module page.

When an order is generated for a product used as a Fundraising premium, the Notes field on the Order Details tab of the Enter and edit orders window displays the text “Premium order for Transaction TransNum, Batch BatchNum” (for example, Premium order for Transaction 1438, Batch 08062004). See Fundraising Management (see "Fundraising") for details about using premium products.

- Default Warehouse - (Required/Displays only if using Multi-Warehouses) Enter a stock item's default warehouse location. Select the Find icon to look up a warehouse; warehouse locations are defined in the Set up warehouses window (from Orders, select Set up warehouses).

  The Default Warehouse field displays only if a product is a stock item and the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory). If a default warehouse is defined on the Inventory System Setup window, the Default Warehouse field defaults to the warehouse defined on the Inventory System Setup window. A product's default warehouse can be overridden at order entry on the Product Detail window with a warehouse that is pre-defined for the product.

  Individual warehouses are set up for products on the Warehouses window (from Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Warehouses).

- Entity - (Optional/displays only if Multiple Entities is enabled on the AR/Cash Set up module window) Enter an owner entity for an individual product. Select the Find icon to look up an entity; entities are defined in the Org Codes field on the Organization Names window (select File > System Setup, and click Organization Names).

  An Entity value can be left blank if the entity owner is the same as the default Orders entity assigned on the AR/Cash Set up module window.

  See Understanding Multiple Entities and Orders for more on product-level entities.

  Product Kit

Enable if a product is a kit. A kit is a group of individual products sold as a single unit. The Product Kit option displays only if your system is licensed for product kitting.

Kit button

(displays only when the Product Kit option is enabled) Opens the Kitting window used for defining product kits.

Total

The totals are display only:

- Qty on Hand - the total number of products in inventory. If using Multi-Warehouses, Qty on Hand includes the total number of products in inventory across all warehouses.
- Reserved - the number of products that are in “open order” status, including backorders. If using Multi-Warehouses, Reserved includes the total number of products reserved across all warehouses.
- Committed - the number of shippable products in inventory excluding backorders. If using Multi-Warehouses, Committed includes the total number of products committed across all warehouses.
- Available - the number of products on hand excluding reserved products. If using Multi-Warehouses, Available includes the total number of products available across all warehouses.
- On Order - the number of products on order from suppliers. If using Multi-Warehouses, On Order includes the total number of products on order across all warehouses.

  The number of products displayed depends on the number of products entered in the On Order field on the Inventory / Warehouses window (click Inventory / Warehouses on the Manage products window).

  Pricing button

  Opens the Special Pricing window used for setting up specific product price calculations.

  Upsell/Replace button

Opens the Upsell/Replace window used for designating Upsell, Cross-sell, and Replacement items for products.

Accounting button

Opens the Accounting window used for entering product account information.

Inventory / Warehouses button

- Inventory button - (Disabled for non-stock items) Opens the Inventory window used for entering product inventory information. The Inventory button displays and replaces the Warehouses button when Multi-Warehouses is disabled.
- Warehouses button - (Disabled for non-stock items) Opens the Warehouses window used for entering inventory information for a product's individual warehouses. The Warehouses button displays and replaces the Inventory button when Multi-Warehouses is enabled.

Publication button

Opens the Publication Demographics window used for defining additional information for publications. The Publication button displays only if the Use Publication Demographics option is enabled for a product's category on the Set up product categories window (from Orders, select Set up tables > Product categories).

Web button

Opens the Web Options window to display a product on the Web.

To edit a product

When editing a product that is a stock item, you cannot disable the Stock Item option if the product has inventory in stock. A product's inventory must be reduced to zero if you want to indicate the product is no longer a Stock Item. For additional information, see To enter inventory adjustments.

1. From Enter and edit products window, select the product you want to edit from the list of Current Products.

2. Click Edit.
3. Make any necessary changes.
4. Click Save.

To delete a product

You can delete a stock item only if all inventory quantities are zero. When you delete a product, all of the product's Upsell/Cross-sell/Replacement records also are deleted.

1. From Enter and edit products window, select the product you want to delete from the list of Current Products.
2. Click Delete. You are prompted to verify deleting the product.
3. Click Yes to delete the product.

To define a product

1. From Enter and edit products window, click New.
2. Define the product:

- Enter a Code for the product. The product code should not contain any spaces or special characters other than an underscore.
- Select a product Category from the drop-down list of available categories.
- Enter a Title for the product.

3. Enter any applicable product descriptions:

- Enter a general product description in the Desc field.
- Enter a product description for a product catalog in the Catalog Desc field.
- Enter any other product description in the Other Desc field.

4. Enter the product's Pricing information:

- Enter a default price for the product in the Regular field.
- (optional) Enter a Non-Member price for the product if applicable.

Note: If products are used only as kit components, you do not need to enter prices for the individual products that make up the kit. Only the kit itself requires product pricing information.

5. Enter the product's Options:

- Enter the product's Unit of Measure, such as each or sheet.
- (optional) Enable the Commissionable option if a product's sale generates a commission (enter a commission percentage in the Comm % field if you enable the Commissionable option).
- Enter the product's Weight.
- Enable the Stock Item option.
- (optional) Enable the Taxable option if the product is taxable.
- (Optional/For use with Fundraising) Enable the Premium option to use the product as a premium for gifts and pledges, and enter a Fair Market Value.
- (Multi-Warehouses only) Enter the product's Default Warehouse location if you are using Multi-Warehouses. Select the Find icon to look up a warehouse.
- (Multi-Entities only) Enter an Entity for the product.

6. Click Save.

Defining Product Kits

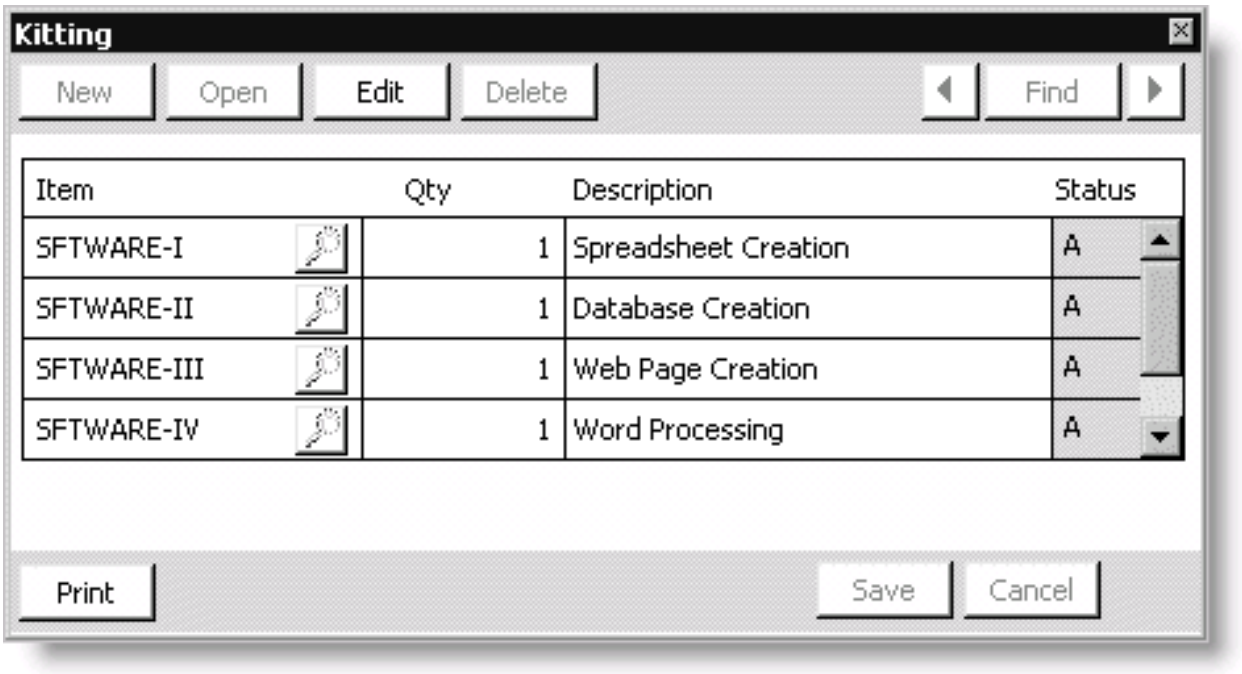
If your system is licensed for Kitting, iMIS Orders allows you to create and maintain product kits. Product kits are groups of individual products sold as a single unit for a single price.

A product kit cannot consist of other product kits or be a stock item. However, a product kit can consist of both individual stock and non-stock items. Just as with individual products, you must define a product category before you can define a product kit. In addition, each individual product first must be defined on the Manage products window before it can be sold as part of a kit.

> **Note:** Note: When defining product kits, be sure to enter a Weight. Freight by weight charges will not calculate for a product kit unless a weight has been defined, regardless of whether weight has been defined for the individual kit components.

Once you define the product kit on the Manage products window, you can assign the individual products to the kit using the Kitting window.

Kitting window



From Orders, select Manage inventory > Manage products, select a product kit, and click Kit

Item

Enter the codes of the products you want to include in the kit. Select the Find icon to look up products.

Qty

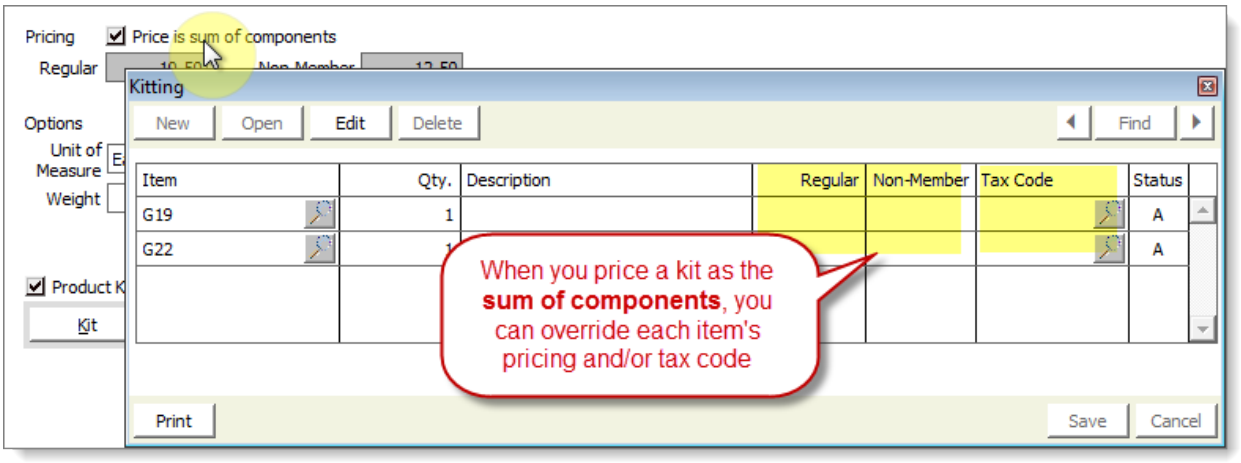
(required) Enter the number of individual products included in the kit. Enter quantities as whole numbers or as partial quantities, such as “1.5.”

Description

Enter a description of the individual products included in the kit. This product description will print on invoices and orders. If you leave the Description field blank, each individual product's Title from the Manage products window will print.

Regular | Non-Member | Tax Code

(VAT feature; requires Price is sum of components) When you create a "sum of components" product kit, all pricing and tax calculations are based on the sum of the individual components of the kit, rather than the kit itself. You can override the pricing of one or more items within the kit, and you can override the tax code of individual items as well. To make a kit item non-taxable, for example, you can override the item's tax code to one that you have set to a zero rate. This flexibility supports complex tax situations, which can help you to meet VAT requirements. These overrides work for kit products across all views of iMIS.



Status

Displays the product's status.

To define a product kit

When defining product kits, remember the following:

- Your system must be licensed for Kitting.
- A product kit cannot consist of other kits or be a stock item; however, a kit can consist of

both individual stock and non-stock items.

- Each individual product must be defined before being sold as part of a kit.

1. From Enter and edit products window, click New.
2. Define the kit:

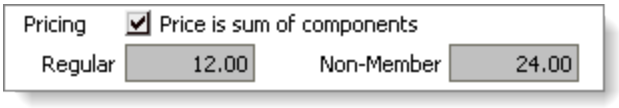
- (required) Enter a Code for the product kit.
- (required) Select a product Category from the drop-down list. The Product Kit option enables and the Kit button displays if the Product Kit option is enabled for the Category on the Set up product categories window.
- Enter a Title for the kit.

3. Enter any applicable product kit descriptions:

- Enter a general kit description in the Desc field.
- Enter a kit description for a product catalog in the Catalog Desc field.
- Enter any other kit description in the Other Desc field.

4. Enter the product kit's Pricing information:

- Price is sum of components – causes the price to be calculated from the sum of its components and so grays out the Regular/Non-Member price fields. The tax for kits is calculated from the Taxable amount of each component, honoring the taxation rules for each.



VAT friendly: A "sum of components" product kit calculates pricing and taxes on the parts of the kit, rather than the kit itself. This supports a mixture of tax rates, which can be required for VAT.

- Regular/Non-Member price fields – Enter a default price for the product kit in the Regular field. This manual kit pricing does not reflect the individual products that make up the kit.

Enter a Non-Member price for the kit as well, if applicable.

5. Enter the product kit's Options:

- Enter the kit's Unit of Measure, such as package or group.
- (optional) Enable the Commissionable option if the product kit's sale generates a commission (enter a commission percentage in the Comm % field if you enable the Commissionable option).
- Enter the product kit's Weight if automatic freight charges are calculated by weight. Freight-by-weight charges will not calculate for a product kit unless a weight has been defined.
- (optional) Enable the Taxable option if the kit is taxable.
- (Multi-Entities only) Enter an Entity for the kit.

6. Click Save.

To define a kit's components

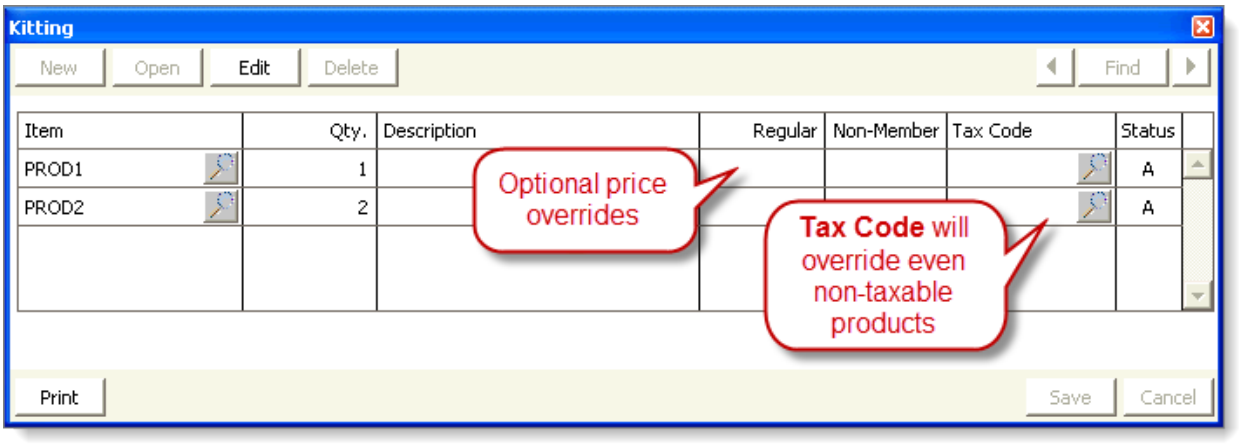
To define a component for a kit, the kit component must have either an Active (A) status or the same status as the parent kit.

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Enter or edit a product kit.
3. While in the edit mode, click Kit to open the Kitting window.
4. Define the kit's components:

- Enter a component's code in the Item field (select the Find icon to look up a product code).
- Enter the number of components in the Qty field that you are including in the kit.
- Enter a Description of the component you are including in the kit. If you leave the Description field blank, the product Title from the Manage products window will print on invoices

and orders.

- If Price is sum of components is enabled, you can enter values in Regular and Non-Member columns, to override the default pricing. You can Find and override the Tax Code as well, but keep in mind that doing so could force a non-taxable product to become taxable.



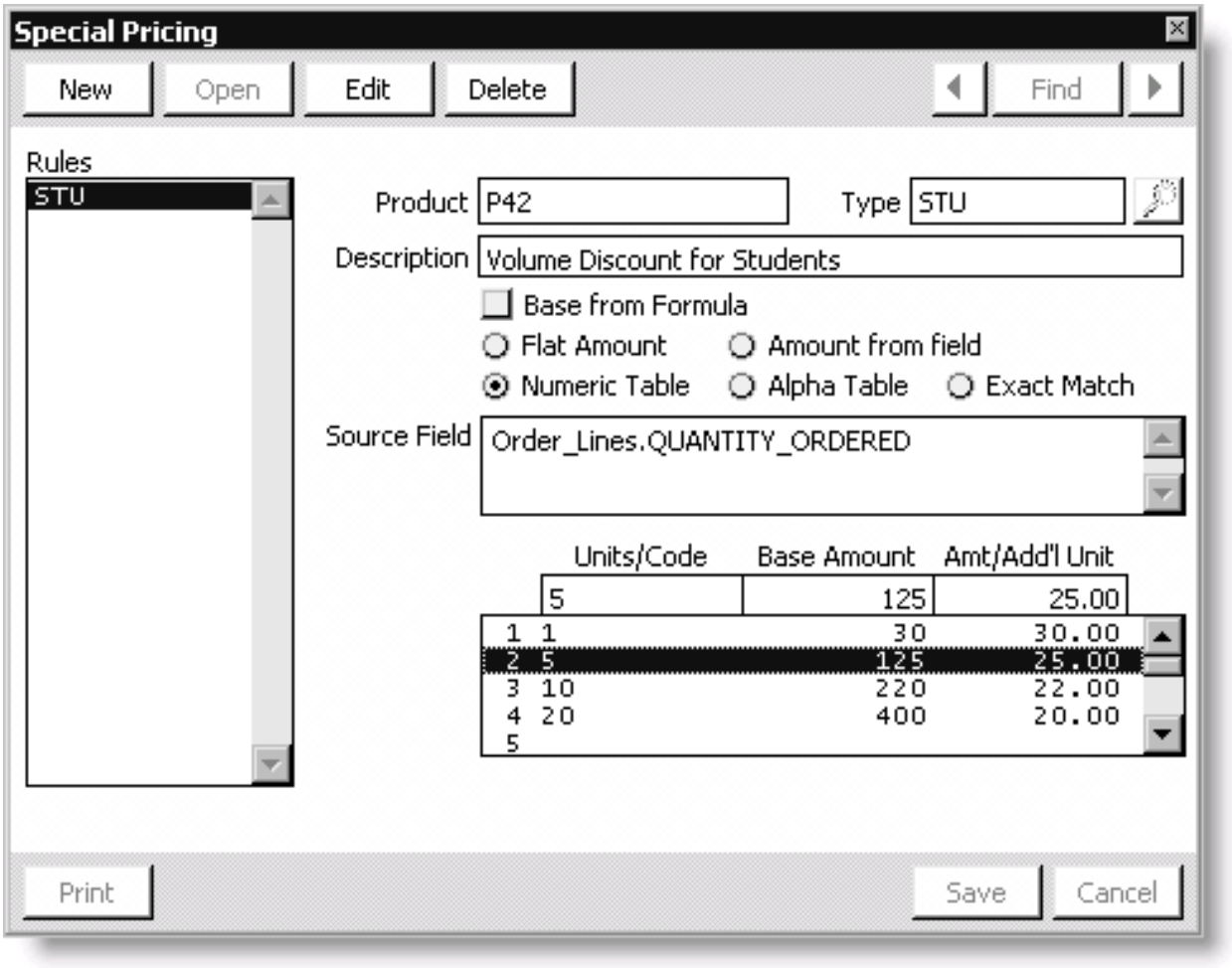
5. Press Tab to generate another line item, and repeat this process for each additional kit component.
6. Click Save.

Defining product special pricing

iMIS Orders allows you to set special pricing discounts that override a product's price as defined on the Manage products window. Special pricing discounts are set up according to customer type.

You also can set up special pricing discounts according to product quantity purchased for specific customer types. For example, you may want to give your customers a discount when they order more than 10 or 20 items of a particular product. Product special pricing is defined on the Special Pricing window.

Special Pricing window for Orders



From Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Pricing

Rules

Lists a product's special pricing rules according to customer type.

Product

Displays the product code to which the special pricing applies.

Type

Enter the customer type to which the product special pricing will apply. Select the Find icon to look up a customer type.

Description

Enter a description of the special pricing rule. This field is for reference only and does not display on any bills or reports.

Base from Formula

(Applicable only for a Numeric Table, Alpha Table, or Exact Match) Enable when you enter a formula (calculation) and not a flat amount in the Base Amount field.

Flat Amount

Enable when defining a single, set price for a specific customer type. If you enable this option, you must enter the price for the specific customer type in the Base Amount field.

Amount from field

Enable to reference an exact cost based on a specific field value or to enter a formula to calculate a cost based on a specific field value. If you enable this option, the Orders and Order_Lines tables are the only tables you can reference in the Source Field.

Numeric Table

Enable to vary costs according to numeric values, such as special rates based on volume. The Numeric Table supports a maximum of 20 rows and calculates unit costs according to the quantity range defined in the table, such as reduced price rates based on quantity ordered.

When setting up each row (each special price break) in the Numeric Table, the value in the Base Amount field must equal the value in the Units/Code field multiplied by the value in the Amt/Addl Unit field.

Alpha Table

Unused.

Exact Match

Unused.

Source Field

Enter the field from the Orders or Order_Lines table you are referencing when you enable the Amount from field, Numeric Table, Alpha Table, or Exact Match option.

Units/Code

(Applicable only for a Numeric Table, Alpha Table, or Exact Match) Enter the minimum number of units purchased that will receive the special pricing discount defined in the Amt/Addl Unit field. The value in the Units/Code field multiplied by the value in the Amt/Addl Unit field must equal the value in the Base Amount field for each row in a Numeric Table.

Base Amount

Enter the amount you are charging for product(s). The amount you enter in the Base Amount field depends on the special pricing option you are using:

- Flat Amount - If you enable the Flat Amount option, the amount entered in the Base Amount field determines the actual amount a specific customer type is charged for a product. For example, if you charge student customers a reduced amount, such as $20 for a magazine subscription, you would enter 20 in the Base Amount field.
- Numeric Table - If you enable the Numeric Table option, the value in the Base Amount field must equal the value in the Units/Code field multiplied by the value in the Amt/Addl Unit field.

  For example, say you want to define a price break of $5.00 on a $25.00 product for customers when they purchase 10 or more products. You would enter 10 in the Units/Code field, 200 in the Base Amount field, and 20 in the Amt/Addl Unit field. Customers then would be charged $20.00 per product for each product order of 10 or more units.

  Amt/Addl Unit

  (Applicable only for a Numeric Table) Enter the unit cost of the special price break; the unit cost entered determines the unit cost for the quantity range. The value entered in the Amt/Addl Unit field multiplied by the value in the Units/Code field must equal the value in the Base Amount field.

  To define product special pricing

Some pricing rules require an understanding of iMIS tables and fields.

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. From the list of Current Products, select the product for which you want to define special pricing.
3. Click Pricing to open the Special Pricing window.
4. Click New.
5. Enter a customer type in the Type field (select the Find icon to look up a customer type).
6. Enter a Description of the special pricing rule.
7. Define your special pricing rule.
8. Click Save.

To generate purchase quantity discounts

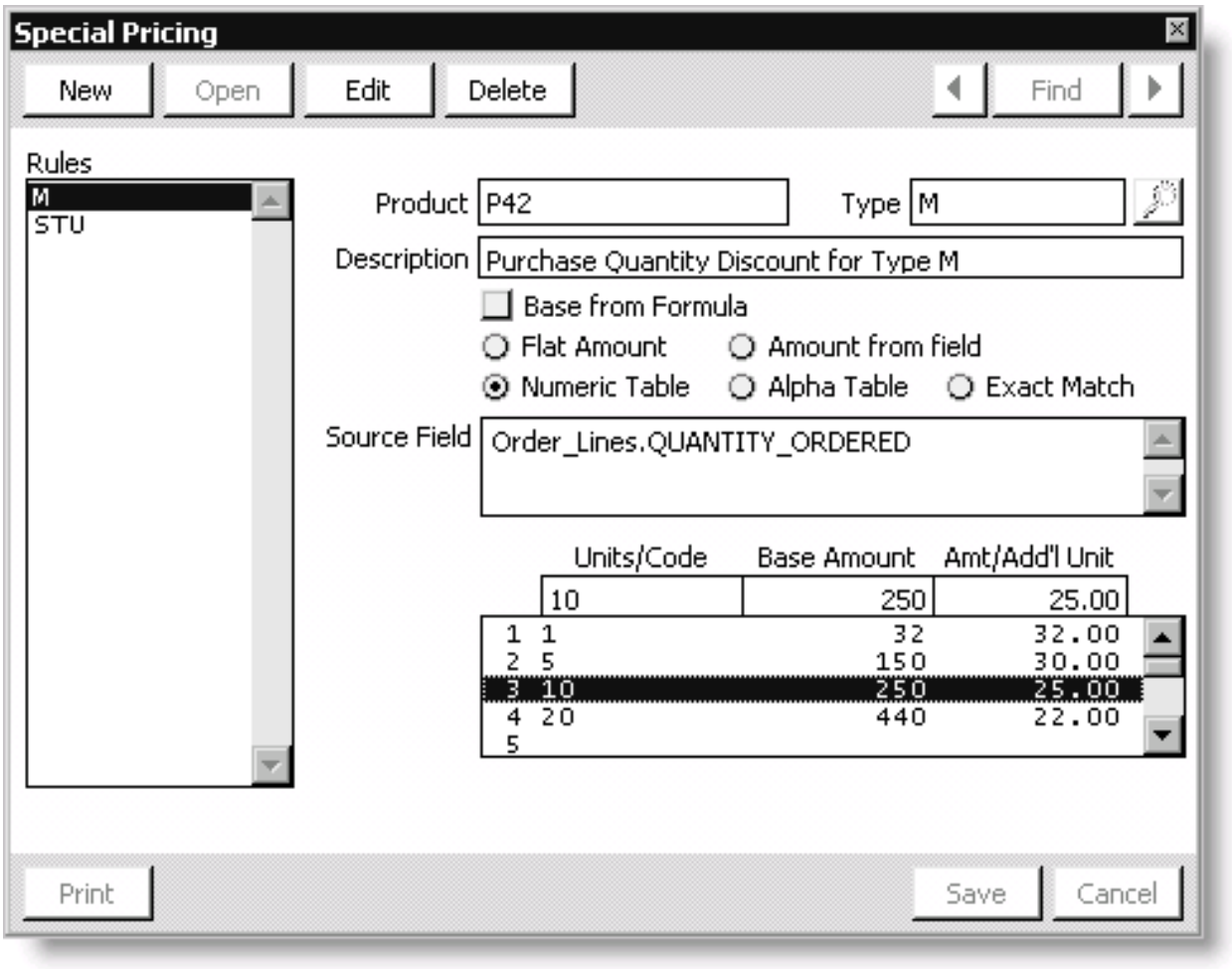
iMIS allows you to generate discounts according to the number of products a customer purchases (excluding freight and handling charges and any applicable taxes). The more products a customer purchases, the greater the discount.

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. From the list of Current Products, select the product for which you want to define special pricing.
3. Click Pricing to open the Special Pricing window.
4. Click New.
5. (required) Enter a customer type in the Type field (select the Find icon to look up a customer type).
6. Enter a Description of the special pricing rule.

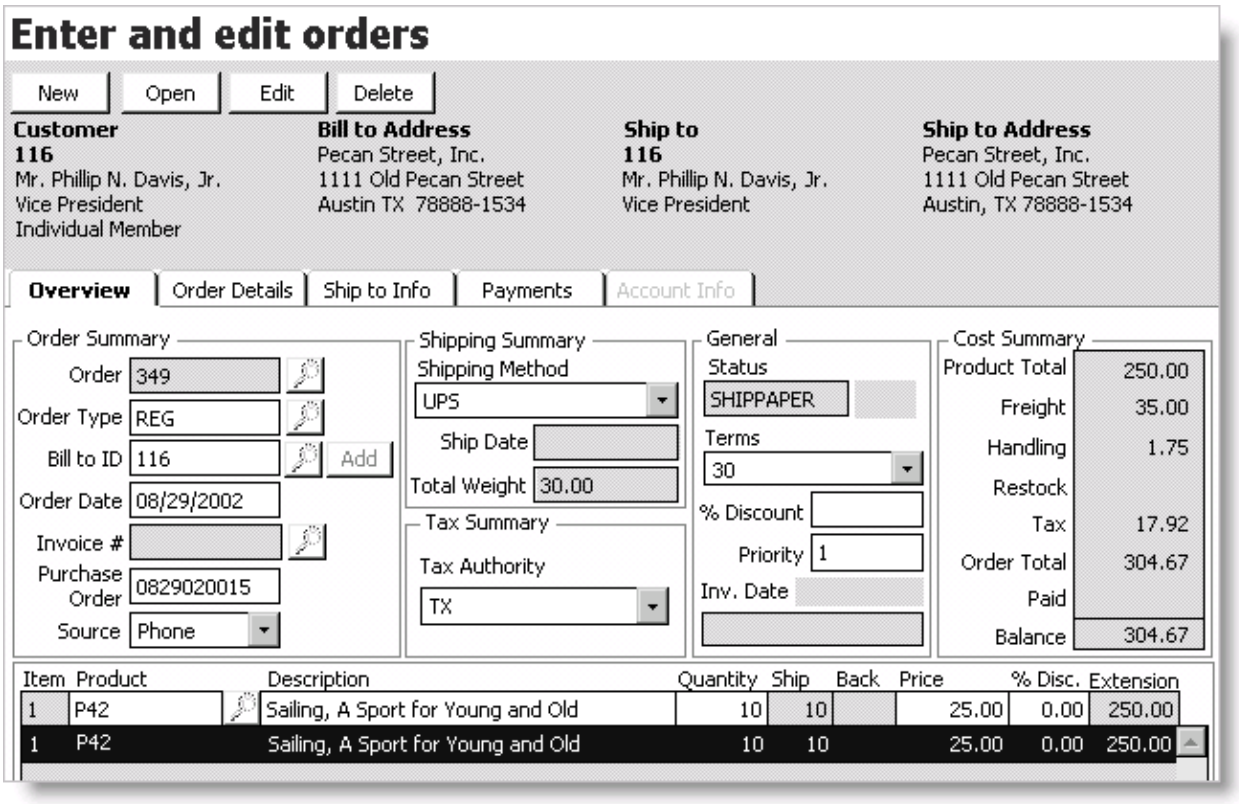
7. Enable the Numeric Table option to display the Base from Formula option and the Source Field, Units/Code, Base Amount, and Amt/Addl Unit fields.
8. Enter Order_Lines.QUANTITY_ORDERED in the Source Field field.
9. Define a price break based on order quantity:
   - In the Units/Code field, enter the minimum number of units to be charged the value defined in the Amt/Addl Unit field.
   - Enter the correct value in the Base Amount field; the amount entered must equal the number of units in the Units/Code field multiplied by the unit price in the Amt/Addl Unit field.
   - In the Amt/Addl Unit field, enter the unit cost. The unit cost entered determines the unit cost for the quantity range.
10. Press Tab, and repeat this process until you have set up all price breaks for the customer type. Each line will represent a different price break based on order quantity.
11. Click Save.
12. Repeat this process for each customer type for which you want to generate purchase quantity discounts.

    Procedure reference

    In the following example of purchase quantity discounts, units 1 - 4 cost $32.00 per unit, units 5 - 9 cost $30.00 per unit, units 10 - 19 cost $25.00 per unit, and units 20 and above cost $22.00 per unit.



Example of a purchase quantity discount defined on the Special Pricing window



Example of the purchase quantity discount defined in the example above as generated for an M type customer

To generate discounts based on total quantity ordered

iMIS Orders allows you to set up price discounts according to customer type and total quantity ordered. Unlike purchase quantity discounts, total quantity discounts apply to all products ordered and not just to one specific type of product. For example, you could set up and apply a 10% discount to an order (excluding freight and handling charges and any applicable taxes) for specific customers who purchase 10 or more products.

Defining a total quantity discount is a two part process:

- Assign a DISCOUNT product to a specific product category.
- Define the parameters for the DISCOUNT product for each customer type on the Special Pricing window.

Once you define the parameters for the DISCOUNT product, you can apply the discount to orders placed by specific customer types. A total quantity DISCOUNT is applied to an order by entering the DISCOUNT just as a product is entered.

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Define a DISCOUNT product:

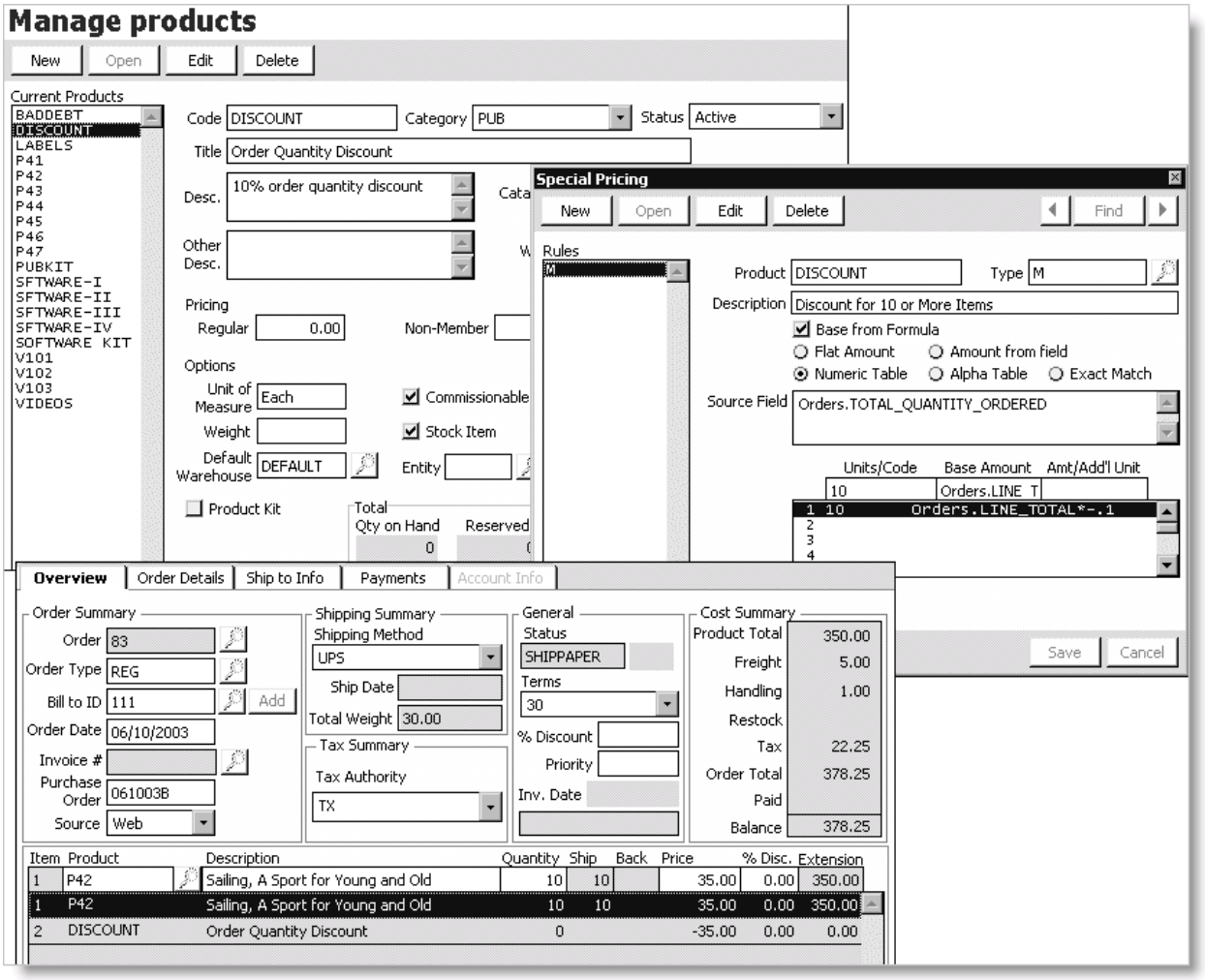
- Click New.
- Enter DISCOUNT for the product Code.
- Select the product Category for which you want to define the discount, such as PUB.
- Enter a Title for the DISCOUNT product.
- Enter a description of the DISCOUNT product in the Desc field.
- Click Save.

3. Select DISCOUNT from the list of Current Products.
4. Define the quantity discount for the DISCOUNT product:

- Click Pricing to open the Special Pricing window.
- Click New.
- Enter a customer Type (select the Find icon to look up a type).
- Enter a Description of the discount.
- Enable the Numeric Table option to display the Base from Formula option and the Source Field, Units/Code, Base Amount, and Amt/Addl Unit fields.
- In the Source Field, enter Orders.TOTAL_QUANTITY_ORDERED.
- In the Units/Code field, enter the minimum number of units for which you want the discount to generate.

- In the Base Amount field, enter Orders.LINE_TOTAL*-.1 (press Ctrl+Z to expand the field to enter the information).

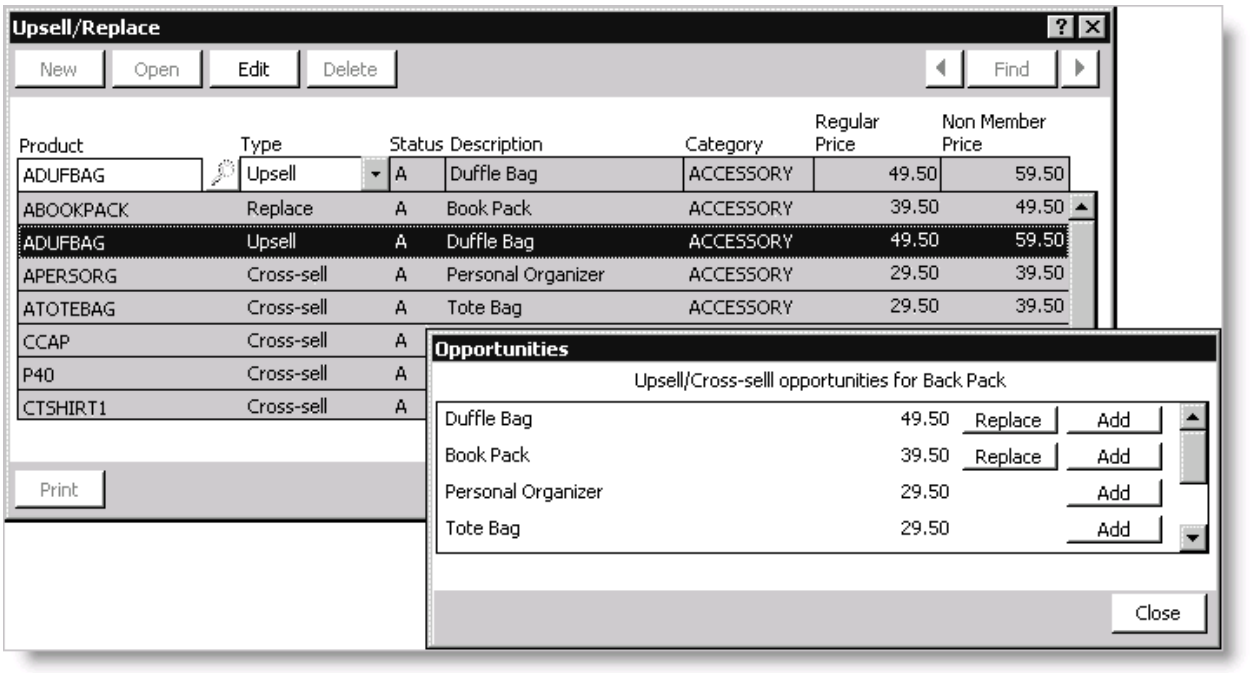
5. Click Save.



Example of a total quantity discount that has been defined and applied to an order

Designating upsell, cross-sell, and replacement items for products

Upsell, Cross-sell, and Replacement items are designated for products on the Upsell/Replace window, which is accessible by clicking Upsell/Replace on the Manage products window. The Product_Substitute table stores the relationships defined for products on the Upsell/Replace window.



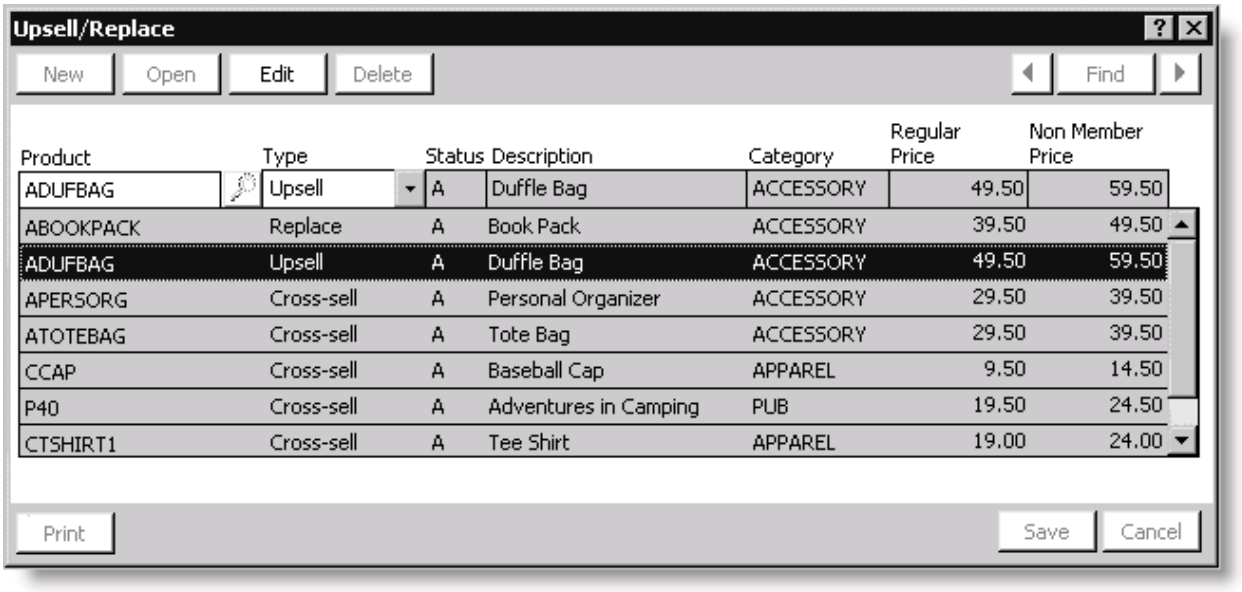
Examples of the Upsell/Replace and Opportunities windows

Both stock and non-stock items can have designated Upsell, Cross-sell, and Replacement opportunities. Upsell, Cross-sell, and Replacement opportunity items can be either stock or non-stock items.

Once you designate Upsell, Cross-sell, or Replacement items for a product, the items are easily accessible during order entry from the Opportunities window. When entering orders, you then can replace a product with an Upsell or Replacement item, or you can add Upsell, Cross-sell, and Replacement items to the order.

Note: Note: When you delete a product from the Manage products window, iMIS also deletes all of the product's Upsell/Cross-sell/Replacement records from the Product_Substitute table.

Upsell/Replace window



From Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Upsell/Replace

Product

Enter a product code for an item you want to designate as an Upsell, Cross-sell, or Replacement item for another product. Select the Find icon to look up a product code.

Type

Designate an item's linked product type by making a selection from the drop-down list:

- Upsell - (To persuade a customer to purchase a product that may have a greater value than the product initially chosen.) Upsell items allow you to replace an available product or add an item as an additional product. No pricing rules exist for products designated as Upsell items, and Upsell items do not have to cost more than the products they replace.
- Cross-sell - (To persuade a customer to purchase one or more similar items that complement the product initially chosen.) Cross-sell items allow you to add products to an order that, based on a marketing-defined relationship, are similar to (or complement) the product originally ordered.

- Replace - (To offer a customer an alternative item to take the place of the product initially chosen.) Replacement items allow you to replace a product or add an item to an order as an additional product.

  Status

  (read only) Displays a product's status.

  Description

  (read only) Displays a product's description.

  Category

  (read only) Displays a product's category.

  Regular Price

  (read only) Displays a product's regular price.

  Non Member Price

  (read only) Displays a product's non-member price.

  To designate opportunity items for a product

  When designating a product's Upsell, Cross-sell, and Replacement opportunity items, iMIS does not allow the following:

- Designating a product as an Upsell, Cross-sell, or Replacement opportunity for itself
- Entering duplicate Upsell, Cross-sell, or Replacement opportunities (a duplicate is defined as two lines having the same Product and Type field values)

  Note: Note: If you are adding opportunity items for a product, and opportunity items already exist on the product's Upsell/Replace window, select the last opportunity item listed before clicking Edit. This will save you from having to scroll through the entire list to add a new item.

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Upsell/Replace to open the Upsell/Replace window.
4. Click Edit. If opportunity items are listed on the window, Tab through the Product and Type fields (without deleting any designated opportunities) until the Product field is blank.
5. Enter a Product code (select the Find icon to look up a product).
6. Select the linked Type for the product you are designating as an opportunity item: Upsell, Cross-sell, or Replace.
7. Click Save.
8. Repeat this process for each additional opportunity item you are designating.

To edit, replace, or delete a product's opportunity items

When editing or replacing a product's Upsell, Cross-sell, and Replacement opportunity items, iMIS does not allow the following:

- Designating a product as an Upsell, Cross-sell, or Replacement opportunity for itself
- Entering duplicate Upsell, Cross-sell, or Replacement opportunities (a duplicate is defined as two lines having the same Product and Type field values)

> **Note:** Note: If you are adding opportunity items for a product, and opportunity items already exist on the product's Upsell/Replace window, select the last opportunity item listed before clicking Edit. This will save you from having to scroll through the entire list to add a new item.

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Upsell/Replace to open the Upsell/Replace window.

4. Select the opportunity item you want to edit, replace, or delete.
5. (optional) To edit an opportunity item:

- Click Edit.
- Select the appropriate Type.
- Click Save.

6. (optional) To replace an opportunity item:

- Click Edit.
- Replace the opportunity item's Product code.
- Select the appropriate Type.
- Click Save.

7. (optional) To delete an opportunity item:

- Click Edit.
- Delete the opportunity item's Product code by pressing Delete.
- Click Save.

To designate opportunity items for kits

When an order is entered for a kit, only Upsell, Cross-sell, and Replacement items designated for the kit parent display on the Opportunities window. Upsell, Cross-sell, and Replacement items designated for kit components will not display on the Opportunities window unless they are also designated for the kit parent.

Opportunity items are designated for kits just as opportunity items are designated for individual products.

Defining product account information

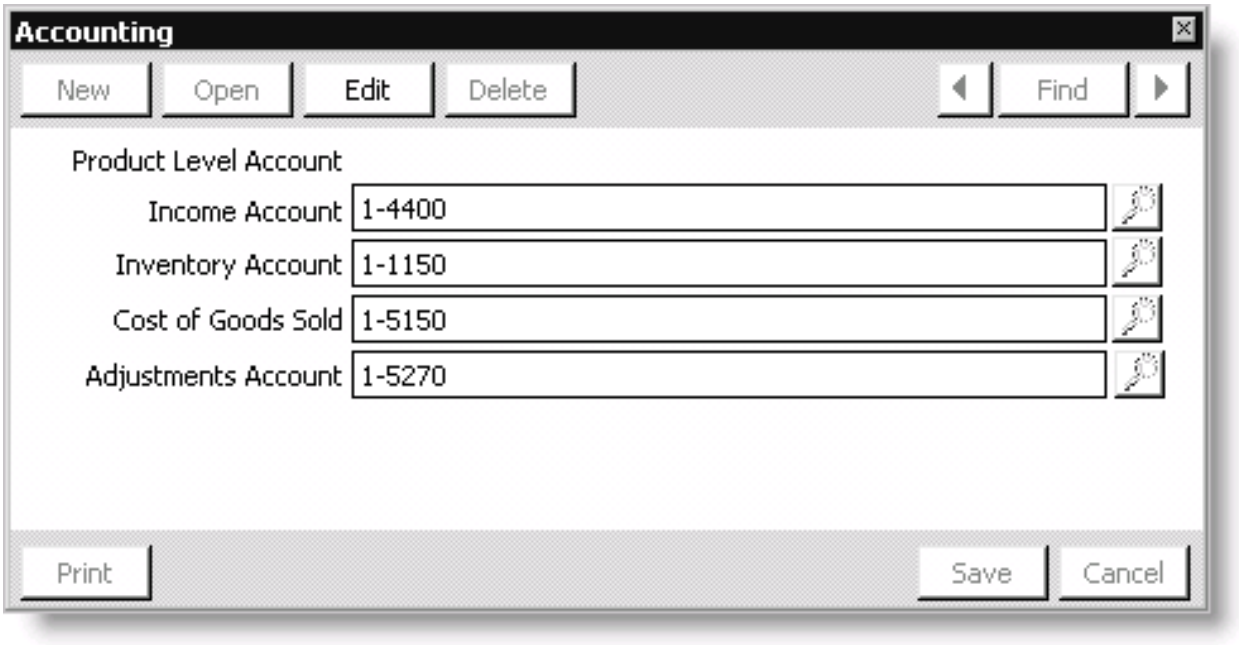
iMIS Orders allows you to define specific account numbers for products on the Accounting window. The accounts defined on the Accounting window are used for recording

credits and debits for products when orders are invoiced and inventory adjustments are posted.

Accounts can be defined for products at several levels, and which accounts are used depend on product account hierarchy. Accounts defined for a product on the Accounting window may not be used. See Understanding Product Account Hierarchy for more.

Before you can define accounts for products, you first must define the individual accounts. Individual accounts are defined on the GL_ACCOUNT table through the Set up general lookup/validation window (from Customers, select Set up tables > General look-up/validation).

Accounting window



From Orders, select Manage inventory> Manage products, select a product from the list of Current Products, and click Accounting

Income Account

Enter the income account number for a product. Select the Find icon to look up an account number.

The Income Account field displays for all products.

Inventory Account

Enter the inventory account number for a product. Select the Find icon to look up an account number.

The Inventory Account field displays only if the Generate Cost of Goods Sold option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

Cost of Goods Sold

Enter the cost of goods sold account number for a product. Select the Find icon to look up an account number. If product adjustments use the same inventory account, leave the Cost of Goods Sold field blank.

The Cost of Goods Sold field displays only if the Generate Cost of Goods Sold option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

Adjustments Account

Enter the adjustment account number for a product. Select the Find icon to look up an account number.

The Adjustments Account field displays only if the Generate Cost of Goods Sold option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

To define product account information

1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product for which you want to define product-specific account information from the list of Current Products.
3. Click Accounting to open the Accounting window.
4. Enter the correct Income Account number (select the Find icon to look up an account).

5. (optional) Enter the correct account numbers in the following fields. These account fields display only if the Generate Cost of Goods Sold option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory):

- Inventory Account (select the Find icon to look up an account)
- Cost of Goods Sold (select the Find icon to look up an account)
- Adjustments Account (select the Find icon to look up an account)

6. Click Save.

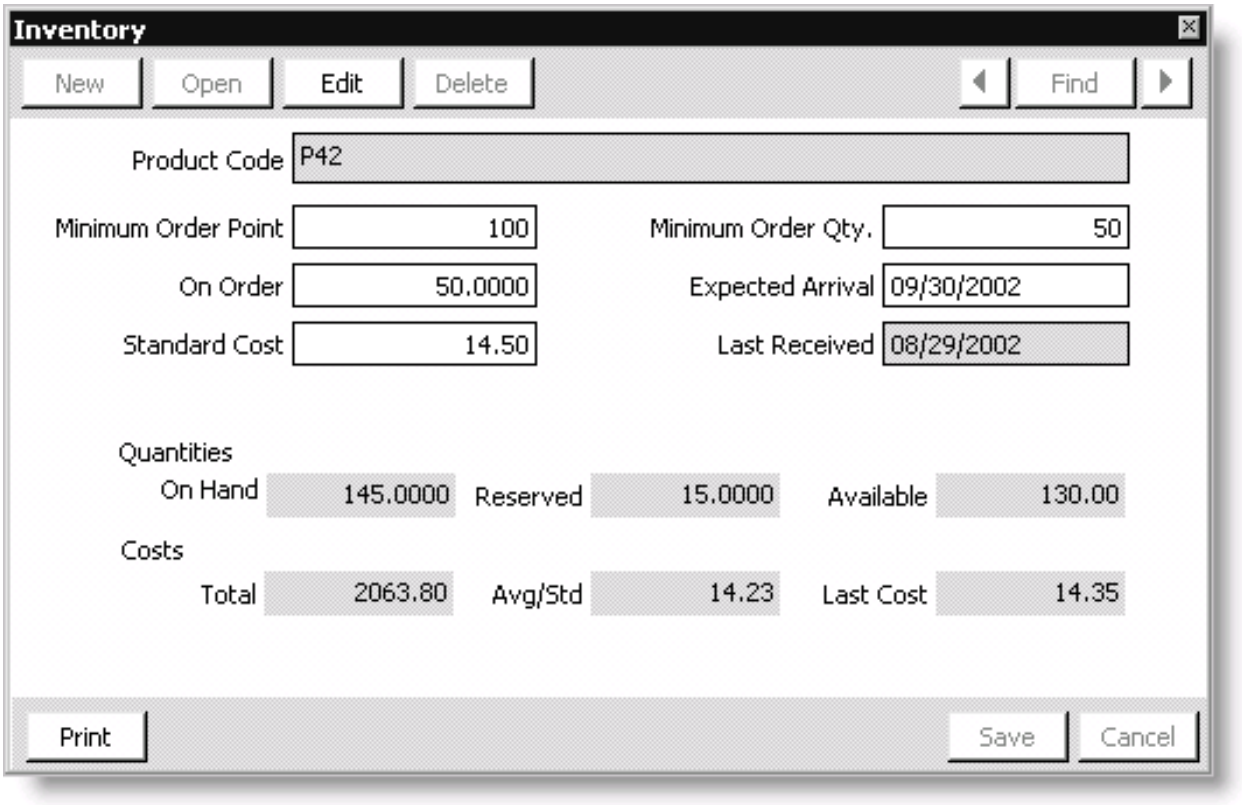
Defining standard inventory parameters

iMIS Orders allows you to define parameters that assist you in managing your product inventory. Inventory can be managed only for stock items, and how you manage your product inventory depends on whether your inventory is stored in a single location or in multiple warehouses. See Defining Inventory Parameters for Multiple Warehouses for more on multiple warehouses.

If you do not store single products in multiple warehouse locations, then you will need to define standard inventory parameters for managing your stock items. Standard inventory parameters are defined on the Inventory window and include reorder points, order quantities, inventory arrival and receipt dates, and product costs. The Inventory window is accessed by clicking the Inventory button on the Manage products window.

In order to access the Inventory window and define inventory parameters for a product, the Stock Item option must be enabled for the product on the Manage products window. If a product is designated as a stock item, the Inventory button will be enabled. If a product is not designated as a stock item, the Inventory button will be visible but disabled.

Inventory window



From Orders, select Manage inventory> Manage products, select a product from the list of Current Products, and click Inventory

Product Code

(read only) Displays the code of the product for which you are defining standard inventory parameters.

Minimum Order Point

Enter a reorder point for a product's inventory. When a product's inventory drops to the reorder point, iMIS informs you that you need to reorder the product when you print the Product Reorder List report (from Orders, select Generate reports, select the Product report type, and select Product Reorder List). iMIS compares the products in inventory to the Minimum Order Point to determine if the product should print on the report.

Minimum Order Qty

Enter a minimum amount of a product to reorder. Often, the quantity entered depends on the order quantity required for receiving a vendor discount. When the inventory level drops below the Minimum Order Point, the suggested Minimum Order Qty prints on the Product Reorder List report (from Orders, select Generate reports, select the Product report type, and select Product Reorder List).

On Order

Enter the number of products currently on order. The value entered in the On Order field is the value that displays in the On Order field on the Manage products window.

iMIS automatically decreases the number of products entered in the On Order field on both the Inventory and Manage products windows when you post product receipts.

Expected Arrival

Enter the date a reordered product is expected to arrive.

Standard Cost

Enter the standard cost of a reordered product. You only need to enter a Standard Cost if you selected Standard Cost as the Valuation Method on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

Last Received

(read only) Displays the last date a product receipt was posted to inventory. Only inventory receipts, and not inventory adjustments, update the Last Received field.

Quantities

- On Hand - (read only) Displays the total number of products currently in inventory.
- Reserved - (read only) Displays the number of reserved products (pre-invoiced products in open order status) in inventory. Reserved products include backorders.
- Available - (read only) Displays the number of products currently available in inventory (On Hand products minus Reserved products).

Costs

- Total - (read only) Displays the total cost of the products in inventory. The total cost is a cumulative running balance of receipts minus the cost of goods sold and/or inventory adjustments.
- Avg/Std - (read only) Displays the average or standard product cost on a per unit basis, depending on the option selected to determine the cost of goods sold.
- Last Cost - (read only) Displays the last amount paid for a product on a per unit basis. Only inventory receipts, and not inventory adjustments, update the Last Cost field.

  The value that displays in the Last Cost field is the value entered in the Unit Cost field on the Enter and edit receipts and adjustments window (from Orders, select Manage inventory> Enter and edit receipts and adjustments).

  To define standard inventory parameters

1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Edit.
4. Click Inventory to open the Inventory window.
5. Enter the product's Minimum Order Point.
6. Enter the product's Minimum Order Qty.
7. Enter the number of products On Order.
8. Enter the product's Expected Arrival date.
9. (optional) Enter the product's Standard Cost if you selected the Standard Cost valuation method on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).
10. Click Save.

Defining inventory parameters for multiple warehouses

If you store single products in multiple warehouse locations, then you can define inventory parameters for each warehouse in which single products are stored. You also have the ability to define a specific bin within a warehouse where a product is stored. Inventory parameters for multiple warehouses include reorder points, order quantities, inventory arrival and receipt dates, product costs, and account numbers.

To use multiple warehouses for storing single products, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

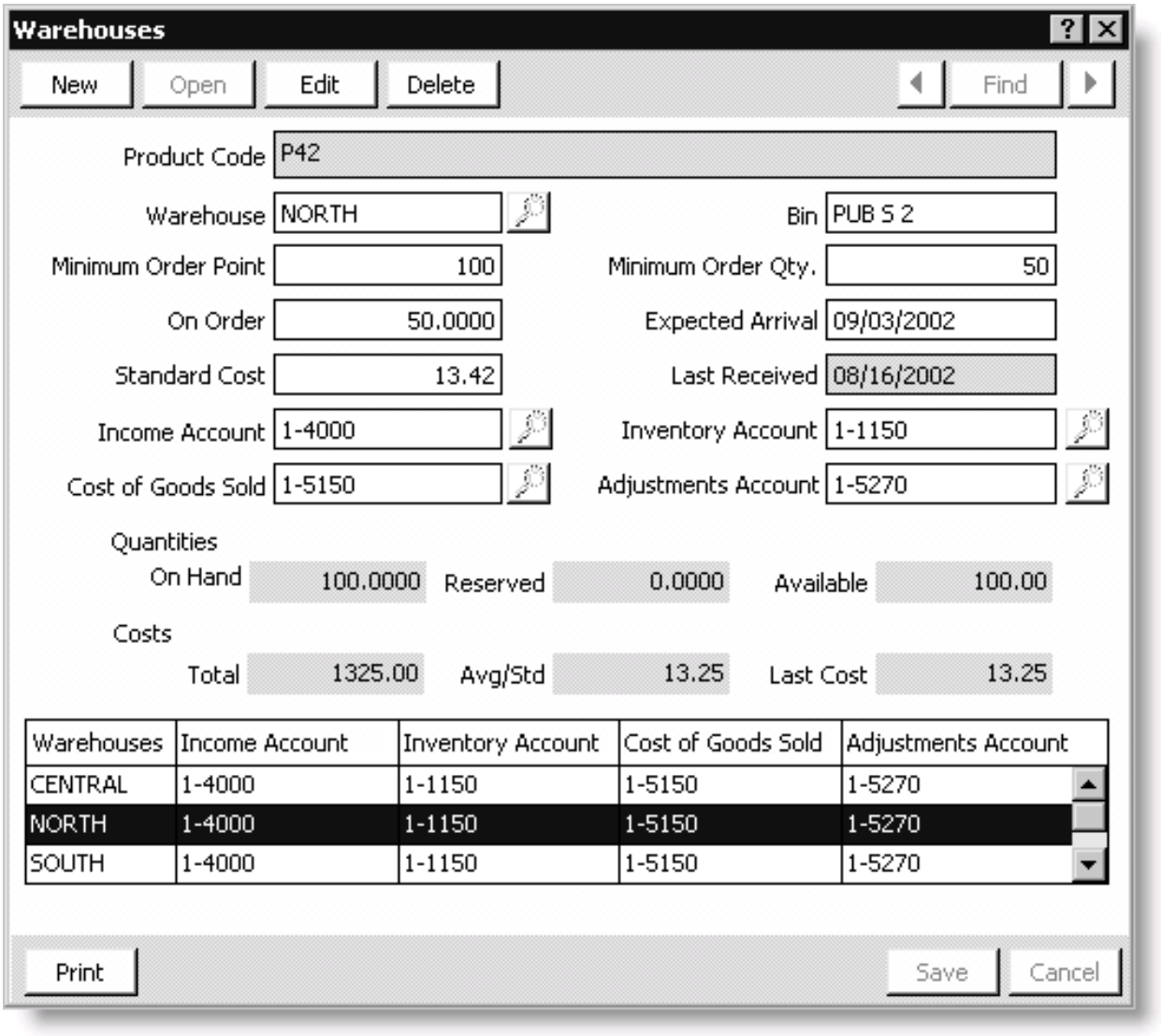
If the Enable Multi-Warehouses option is enabled, the Warehouses button displays in place of the Inventory button on the Manage products window. The Warehouses window is used for setting up multiple warehouses for single products and is accessed by clicking the Warehouse button.

To access the Warehouses window and define inventory parameters for a product's warehouses, the Stock Item option must be enabled for a product on the Manage products window. If a product is designated as a stock item, the Warehouses button will be enabled. If a product is not designated as a stock item, the Warehouses button will be visible but disabled.

Each product can be assigned a default warehouse on the Manage products window. If a product has a default warehouse, iMIS verifies that the default warehouse has sufficient inventory in stock when an order for the product is entered. If insufficient inventory is in stock at the default warehouse, you have the ability to order the product from another warehouse. If necessary, you also have the ability to override a product's default warehouse at order entry.

To define inventory parameters for multiple warehouses on the Warehouses window, the warehouses first must be defined on the Set up warehouses window (from Orders, select Set up warehouses). See Defining Warehouse Locations (see "Orders: Set up warehouses") for more.

Warehouses window



From Orders, select Manage inventory> Manage products, select a product from the list of Current Products, and click Warehouses

Delete button

Click to delete a product's warehouse. The following conditions exist for deleting a product's warehouse:

- The warehouse must be empty of all inventory.
- The warehouse cannot be the product's Default warehouse.

- No orders can be open for the product stored in the warehouse.

  Product Code

  (read only) Displays the code of the product for which you are setting up warehouses and defining inventory parameters.

  Warehouse

  Enter a warehouse location for a product. Select the Find icon to look up a warehouse location; warehouse locations are defined on the Set up warehouses window (from Orders, select Set up warehouses).

  Bin

  (optional) Use this field to define a specific bin where a product is stored in a warehouse.

  Minimum Order Point

  Enter a reorder point for a product's inventory. When a product's inventory at a warehouse drops to the reorder point, iMIS informs you that you need to reorder the product when you print the Product Reorder List report (from Orders, select Generate reports, select the Product report type, and select Product Reorder List). iMIS compares the products in inventory to the Minimum Order Point to determine if the product should print on the report.

  Minimum Order Qty

  Enter a minimum amount of a product to reorder for a warehouse. Often, the quantity entered depends on the order quantity required for receiving a vendor discount. When the inventory level drops below the Minimum Order Point, the suggested Minimum Order Qty prints on the Product Reorder List report (from Orders, select Generate reports, select the Product report type, and select Product Reorder List).

  On Order

  Enter the number of products currently on order for a warehouse.

The value entered in the On Order field is the value that displays in the On Order field on the Manage products window. If you store a single product's inventory in multiple warehouses, the On Order field on the Manage products window displays the combined total product quantity on order for all the warehouses.

iMIS automatically decreases the number of products entered in the On Order field on both the Inventory and Manage products windows when you post product receipts.

Expected Arrival

Enter the date a reordered product is expected to arrive at a warehouse.

Standard Cost

Enter the standard cost of a reordered product for a warehouse. You only need to enter a Standard Cost if you selected Standard Cost as the Valuation Method on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

Last Received

(read only) Displays the last date a product receipt was posted to inventory for a warehouse. Only inventory receipts, and not inventory adjustments, update the Last Received field.

Income Account

Enter the income account number for a product stored in a warehouse. Select the Find icon to look up an account number; individual accounts are defined for the GL_ ACCOUNT table on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation).

Inventory Account

Enter the inventory account number for a product stored in a warehouse. Select the Find icon to look up an account number; individual accounts are defined for the GL_ ACCOUNT table on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation).

Cost of Goods Sold

Enter the cost of goods sold account number for a product stored in a warehouse. Select the Find icon to look up an account number; individual accounts are defined for the GL_ ACCOUNT table on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation).

Adjustments Account

Enter the adjustment account number for a product stored in a warehouse. Select the Find icon to look up an account number; individual accounts are defined for the GL_ ACCOUNT table on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation).

Quantities

On Hand - (read only) Displays the total quantity of a product currently in inventory at a warehouse.

Reserved - (read only) Displays the reserved quantity of a product (pre-invoiced products in open order status) in inventory at a warehouse. Reserved products include backorders.

Available - (read only) Displays the quantity of a product currently available in inventory at a warehouse (On Hand products minus Reserved products).

Costs

Total - (read only) Displays the total cost of a product in inventory at a warehouse. The total cost is a cumulative running balance of receipts minus the cost of goods sold and/or inventory adjustments.

Avg/Std - (read only) Displays the average or standard cost of a product at a warehouse on a per unit basis, depending on the option selected to determine the cost of goods sold.

Last Cost - (read only) Displays the last amount paid for a product in inventory at a warehouse. The cost is calculated on a per unit basis. Only inventory receipts, and not inventory adjustments, update the Last Cost field.

The value that displays in the Last Cost field is the value entered in the Unit Cost field on the Enter and edit receipts and adjustments window (from Orders, select Manage inventory> Enter and edit receipts and adjustments).

Warehouses

Displays all of the warehouses set up for a product. Each warehouse line item displays a warehouse's code and account information.

To define warehouse parameters

Before defining warehouse parameters, make sure that you have defined the individual warehouses on the Set up warehouses window (from Orders, select Set up warehouses).

1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Warehouses to open the Warehouses window.
4. Click New.
5. Enter the location of the Warehouse (select the Find icon to look up a warehouse location).
6. (optional) Enter the Bin in which the product is stored in the warehouse.
7. Enter the product information.

- Enter the product's Minimum Order Point.
- Enter the product's Minimum Order Qty.
- Enter the number of products On Order.
- Enter the product's Expected Arrival date.
- (optional) Enter the product's Standard Cost if you selected the Standard Cost valuation method on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

8. Enter the warehouse's Income Account (select the Find icon to look up an account).
9. (optional) Enter the warehouse's remaining account numbers. These account fields display only if the Generate Cost of Goods Sold option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory):

- Inventory Account (select the Find icon to look up an account)
- Cost of Goods Sold (select the Find icon to look up an account)
- Adjustments Account (select the Find icon to look up an account)

10. Click Save.

To edit warehouse parameters

1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Warehouses to open the Warehouses window.
4. Click Edit.
5. Select a warehouse line item from the list of Warehouses.
6. Make any necessary changes.
7. Click Save.

To delete a product's warehouse

Once you remove a product's warehouse, you cannot post any outstanding, non-posted inventory transactions for that warehouse. If you post inventory transactions manually (recommended) and remove a product's warehouse, all non-posted inventory transactions will be removed from the Post receipts window (from Orders, select Manage inventory> Post receipts).

However, non-posted inventory transactions will still display on the Enter and edit receipts and adjustments window (from Orders, select Enter and edit receipts and adjustments).

1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Warehouses to open the Warehouses window.
4. Select the warehouse you want to delete from the list of Warehouses:

- The warehouse must be empty of all inventory.
- The warehouse cannot be the product's Default warehouse.
- No orders can be open for the product stored in the warehouse.

5. Click Delete. A message displays prompting you to confirm deleting the selected warehouse.
6. Click Yes to delete the warehouse.

Defining publication demographics

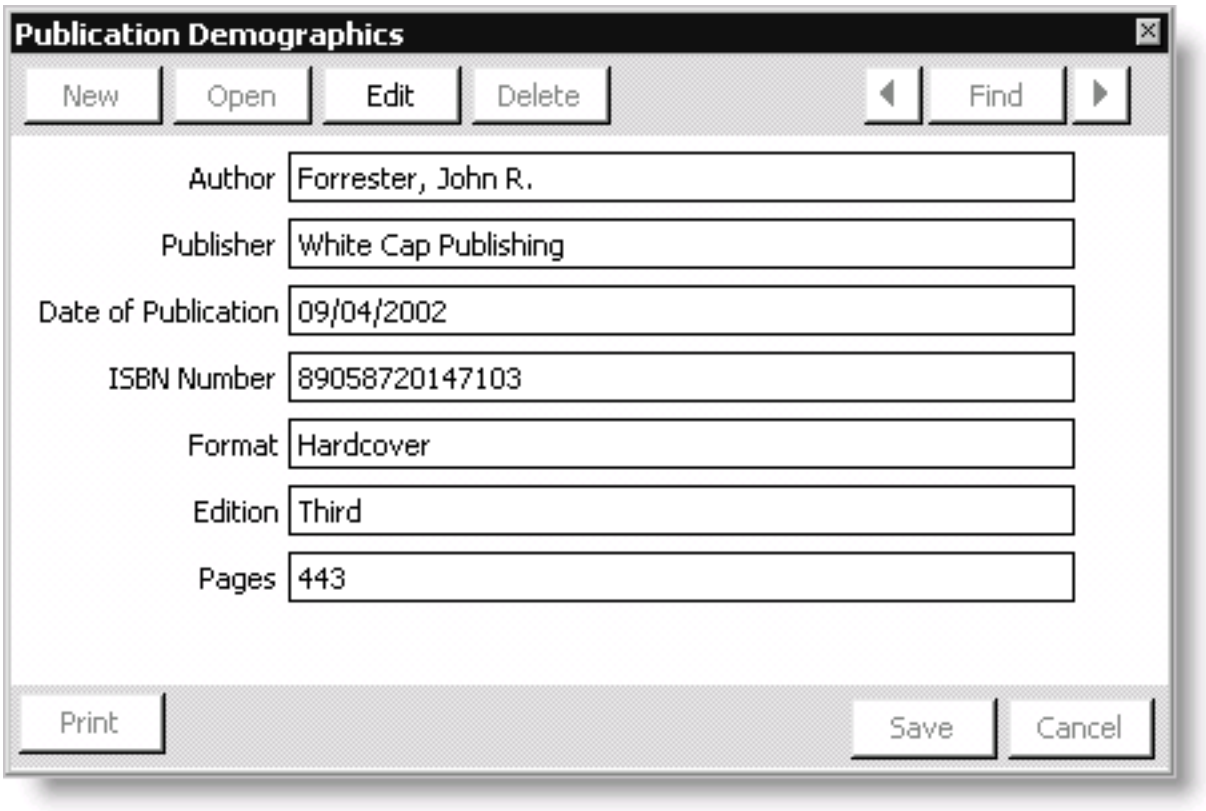
iMIS Orders allows you to define and store specific information about the various publications you offer for sale to your customers. Detailed publication information is defined on the Publication Demographics window, and the information that you define displays as read-only data on the Publication Detail window. The Publication Detail window is accessible by clicking the Publication Detail button on the Product Detail window.

If the Use Publication Demographics option is enabled for a product category on the Set up product categories window, then the Publication button will display on the Manage products window for products belonging to that category. Clicking the Publication button opens the Publication Demographics window.

For the Publication Detail button to display and/or enable on the Product Detail window, the following conditions must be true:

- The Use Publication Demographics option must be enabled for the product's category on the Manage products window. The Publication Detail button only displays when the option is enabled for a product's category.
- Data must be entered in at least one field on a product's Publication Demographics window. If data is not entered in at least one field, the Publication Detail button will not enable on the Product Detail window.

Publication Demographics window



From Orders, select Manage inventory> Manage products, select a product from the list of Current Products, and click Publication

Author

Enter a publication's author.

Publisher

Enter a publication's publisher.

Date of Publication

Enter a publication date. You can enter any date in the mm/dd/yyyy format, or you can let iMIS format a date automatically. If iMIS automatically formats a date, the date formats to mm/dd/yyyy, and the applicable date range is from 1980 to 2079.

For example, if you enter 092698 for the publication date, the date automatically formats to 09/26/1998. If you enter 092602, the date automatically formats to 09/26/2003.

ISBN Number

Enter a publication's International Standard Book Number.

Format

Enter a publication's binding format, such as softbound or hardcover.

Edition

Enter a publication's edition number.

Pages

Enter a publication's number of pages.

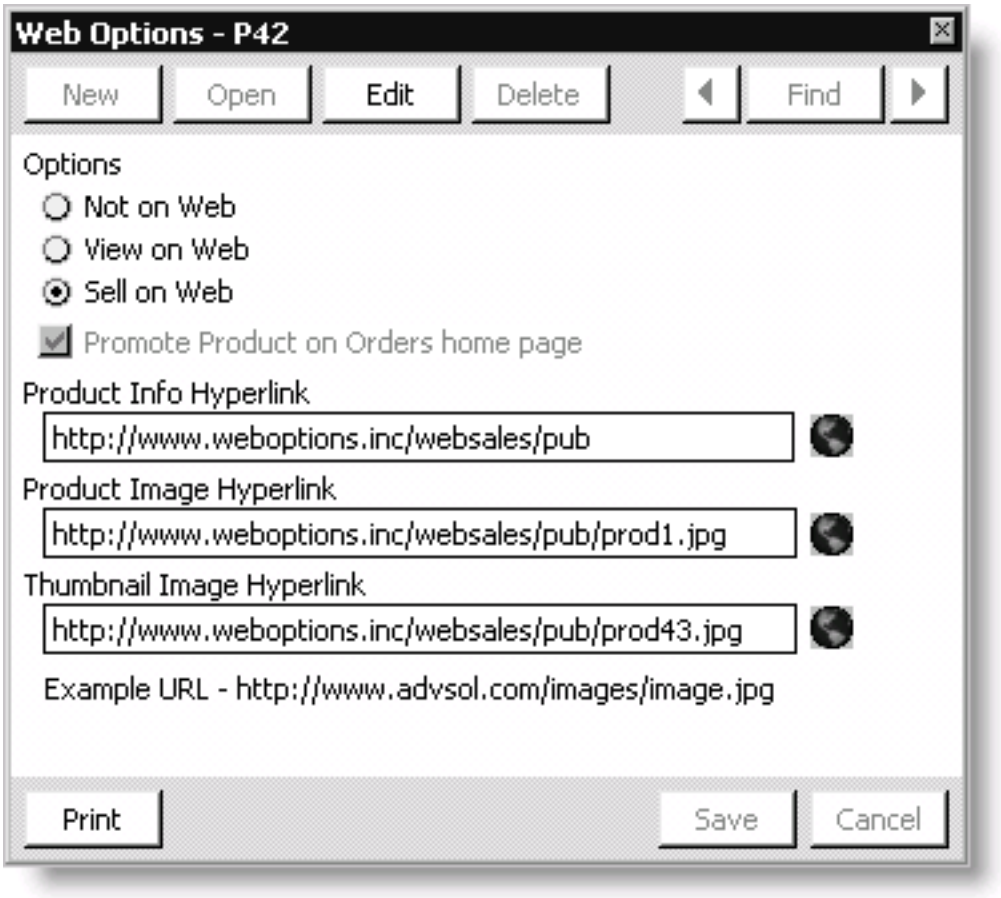
To enter or edit publication demographic information

1. Make sure the Use Publication Demographics option is enabled for a product's category on the Set up product categories window. See "Product categories setup" for details.
2. From Orders, select Manage inventory> Manage products to open the Manage products window.
3. Select a product from the list of Current Products for which you want to define publication demographics. The Publication button will display.
4. Click Publication to open the Publication Demographics window.
5. Click Edit.
6. Enter or edit the product's publication demographic information.
7. Click Save.

Enabling products for the web

You can enable products to be viewed or sold on the web using the Web Options window (Orders > Manage inventory > Manage products, select a product and click Web). The options set here affect products sold through the web views of iMIS. See "Enabling product categories for the web".

Web Options window for products



From Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Web

Options

- Not on Web - Prevents the product from being viewed or sold on the web.
- View on Web - Allows the product to be viewed, but not sold, on the web.
- Sell on Web - Allows the product to be viewed and sold on the web.

> **Note:** Note: The viewing option selected at the product level can be overridden at the product category level for web view products (Orders > Set up tables > Product categories, select a category, and click Web Options).

Promote Product on Orders home page

Enable to promote the product as a Featured Product on the Orders main page and on every search results page.

Product Info Hyperlink

Enter a URL to information about the product category. Click the Web icon to view the product category's information on the web.

By default, this field populates with the value entered for the product's category in the Product Info Hyperlink field on the Web Options window (from Orders, select Set up tables > Product categories, select a category, and click Web Options).

Product Image Hyperlink

Enter a URL to an image representing the product category. Click the Web icon to view the product category on the web.

By default, this field populates with the value entered for the product's category in the Product Image Hyperlink field on the Web Options window (from Orders, select Set up tables > Product categories, select a category, and click Web Options).

Thumbnail Image Hyperlink

Enter a URL to an image of the product. Click the Web icon to view the product on the web.

To enable a product for the Web

1. From Orders, select Manage inventory > Manage products to open the Manage products window.
2. Select a product from the list of Current Products.
3. Click Edit.

4. Click Web to open the Web Options window.
5. Enable the product for the Web:

- Not on Web - prevents it from being viewed or sold on the web.
- View on Web - allows it to be viewed, but not sold, on the web.
- Sell on Web - allows it to be viewed and sold on the web.

6. Enable Promote Product on Orders home page option if you want to promote the product as a Featured Product on your main page and on every search results page.
7. Enter the Product Info Hyperlink.
8. Enter the Product Image Hyperlink.
9. Enter the Thumbnail Image Hyperlink.
10. Click Save.

Product Inventory

The flexibility of Orders simplifies managing product inventory and ensures inventory transactions are recorded efficiently and accurately. How you manage product inventory and process inventory transactions depends on whether your inventory is stored in a single location or in multiple warehouses.

After entering a product inventory transaction, the transaction must be posted. Inventory transactions can be posted either automatically or manually. Manually posting inventory transactions is recommended because it provides an opportunity to review a transaction for errors. Automatic transaction posting does not offer this opportunity.

Product inventory transactions are separated into three distinct tasks:

- Receipts - Record and track your physical product inventory.
- Adjustments - Adjust your product inventory records in the event of loss or damage.
- Transfers - If you are using multiple warehouses, record product inventory transfers from warehouse to warehouse.

Product inventory transactions can be entered only for products that have Active, Inactive, or Out of Production status. Changes to product status codes are not retroactive, and existing inventory receipts, adjustments, and transfers are not affected by product status changes.

Enter and post product inventory transactions using the windows accessed through the Manage inventory sub-task list.

Manage inventory sub-task list

> **Note:** Note: From Orders, select Manage inventory.

Manage products

Select to open the Manage products window used for defining and managing individual products.

Enter and edit receipts and adjustments

Select to open the Enter and edit receipts and adjustments window used for entering product inventory transactions.

Post receipts

Select to open the Post receipts window used for manually posting inventory transactions.

Entering and posting inventory transactions

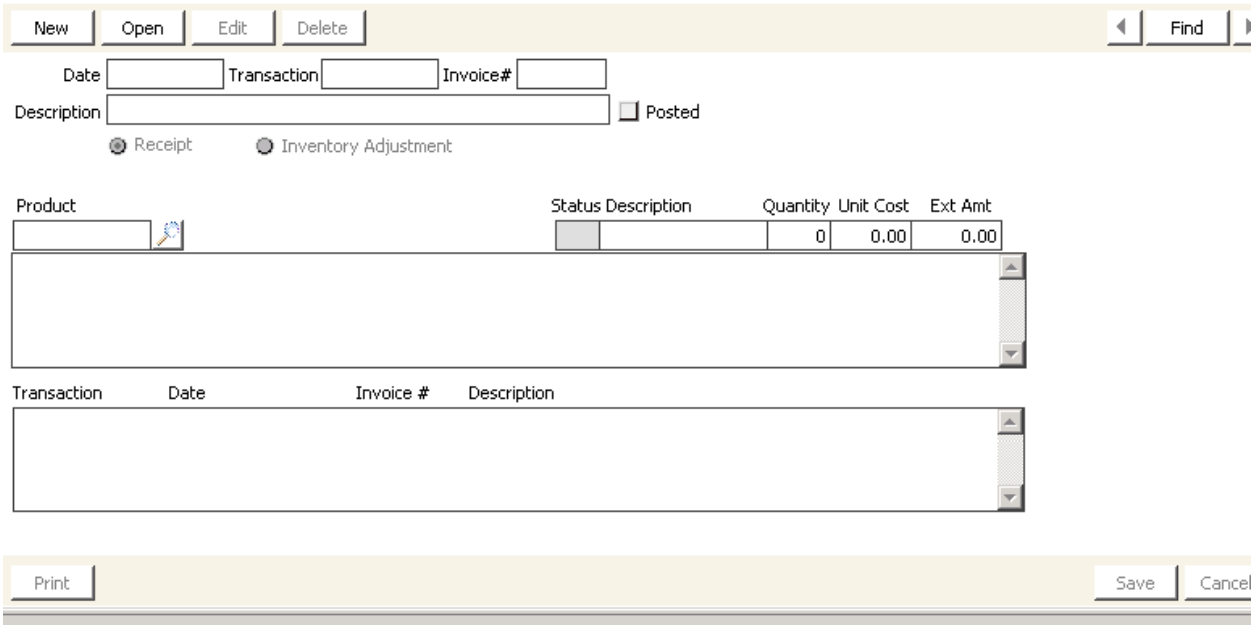
Product inventory transactions include inventory receipts, adjustments, and transfers. Automatically posting inventory transactions is not recommended because it does not allow you to review your transactions or make any necessary corrections before the transactions are posted.

By posting transactions manually, you can verify and correct any errors before a transaction is posted. This helps protect product inventory, backorder, and cost of goods sold information from inadvertent updates and changes.

To post inventory receipts and adjustments manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

All inventory transactions are entered using the Enter and edit receipts and adjustments window (from Orders, select Manage inventory > Enter and edit receipts and adjustments).

Enter and edit receipts and adjustments window



Admin Console: Home > Commerce > Enter and edit receipts and adjustments
Desktop: Manage inventory > Enter and edit receipts and adjustments

Date

Enter the date of a product inventory transaction. The Date field defaults to the current system date but can be overridden.

Transaction

Enter a transaction number when opening or editing a product inventory transaction. Transaction numbers are system generated when an inventory transaction is entered.

Invoice #

Enter an invoice number for a product inventory transaction. Using an invoice number from a vendor's invoice is recommended.

Description

Enter a brief description of the product inventory transaction.

Posted

This option enables automatically when the selected inventory transaction has been posted.

Receipt

Enable to record an inventory receipt.

Inventory Adjustment

Enable to record an inventory adjustment rather than an inventory receipt. An inventory adjustment will affect a product's Qty on Hand as displayed on the Manage products window (from Orders, select Manage inventory> Manage products).

Transfer

(Multi-Warehouses only) Enable to transfer product inventory from one warehouse to another. The Transfer option displays only if the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

The following fields display when the Transfer option is enabled:

- From Warehouse - Replaces the Warehouse field
- Bin (From Warehouse)
- To Warehouse
- Bin (To Warehouse)

Product

Enter the product code for which you are entering an inventory transaction (select the Find icon to look up a product code). Inventory transactions can be entered only for products that have an Active, Inactive, or Out of Production status.

Warehouse

(Required/Displays for Multi-Warehouses only) Enter the warehouse for which you are entering a product inventory receipt or adjustment. The Warehouse field is a required field and defaults to a product's Default Warehouse on the Manage products window, but it can be overridden.

Select the Find icon to look up a warehouse; warehouses are defined on the LOCATION general lookup/validation table.

From Warehouse

(Replaces the Warehouse field when the Transfer option is enabled) Enter the warehouse from which you are transferring a product's inventory. The From Warehouse field is a required field and defaults to a product's Default Warehouse on the Manage products window, but it can be overridden to another warehouse that has the same product in stock.

Select the Find icon to look up a warehouse; warehouses are defined on the LOCATION general lookup/validation table.

Bin

(Displays for Multi-Warehouses only) Enter the warehouse bin for which you are entering a product inventory receipt or adjustment, or enter the warehouse bin from where you are transferring a product's inventory. The Bin field defaults to the bin defined for the Default Warehouse, but it can be overridden for any bin (the bin does not have to be pre-defined) when recording inventory transactions.

To Warehouse

(Displays only when the Transfer option is enabled) Enter the warehouse to which you are transferring a product's inventory (this warehouse must be pre-defined for the product). The To Warehouse field is a required field for inventory transfers.

Select the Find icon to look up a warehouse; warehouses are defined on a product's Warehouses window.

Bin

(Displays only when the Transfer option is enabled) Enter the warehouse bin to which you are transferring a product's inventory. The Bin field defaults to the bin defined for a warehouse on the Warehouses window, but it can be overridden.

If you update a To Warehouse's Bin field, the Bin field on the Warehouses window will be updated for that particular warehouse.

Status

(read only) Displays the product's status. Product inventory receipts, adjustments, and transfers can be entered only for products that have an Active, Inactive, or Out of Production status. See Product Status Codes for more on product status codes.

Description

(read only) Displays a description of the product entered in the Product field. The value that displays in the Description field is the value entered in the Title field on the Manage products window.

Quantity

Enter the number of products involved in the inventory transaction. The following stipulations exist depending on transaction type:

- Receipt - A negative value cannot be entered for an inventory receipt.
- Inventory Adjustment - No stipulations.
- Transfer - A negative value cannot be entered for an inventory transfer, and the value

entered in the Quantity field cannot exceed a From Warehouse's available inventory quantity.

Unit Cost

Enter the per-unit cost of a product. For inventory receipts and adjustments, the Unit Cost field defaults to the value displayed in the Last Cost field on a product's Inventory window. You can override a product's unit cost as necessary.

For inventory transfers, the Unit Cost field is display only and cannot be edited. The value that displays in the Unit Cost field depends on the Valuation Method selected on the Inventory System Setup window:

- Standard Cost valuation method
- If the From Warehouse's total product cost equals zero, then the value displayed in the Unit Cost field will be zero.
- If both the From Warehouse's total product cost and standard product cost are greater than zero, then the value displayed in the Unit Cost field will equal a product's standard cost.
- If none of the above are true, then the value displayed in the Unit Cost field will equal a product's average cost.
- Average valuation method
- If the From Warehouse's total product cost equals zero, then the value displayed in the Unit Cost field will equal zero.
- If the From Warehouse's total product cost does not equal zero, then the value displayed in the Unit Cost field will equal the average product cost.

Ext Amt

(read only) Displays the system-generated extended amount of a product's cost, which is the product Quantity times the product Unit Cost.

Product Inventory

(read only) Displays all of the product line-items for which you entered inventory transactions.

Inventory Transactions

(read only) Displays all of the product inventory transactions processed during the current session.

Entering inventory receipts

Product inventory receipts allow iMIS Orders to record and track your physical product inventory accurately and efficiently. Inventory receipts are recorded when a product is received in inventory, and receipts can be entered only for stock items that have an Active, Inactive, or Out of Production status.

When entering product inventory receipts, enter the transaction date, invoice number, description, and quantity received in inventory for a specific product. When an inventory receipt is entered, a transaction number is generated automatically as a reference for the receipt. When inventory receipts are posted, iMIS automatically updates and adjusts your product inventory records.

To ensure accurate inventory records, manually posting inventory receipts is recommended because it provides an opportunity to review the receipts before they are posted. This helps prevent entering any inadvertent updates or changes. To post inventory receipts manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

Your method of storage determines how inventory receipts are entered. If an individual product is stored in a single storage facility, you only need to enter a single inventory receipt for a product. If an individual product is stored in multiple warehouses, you have the ability to enter inventory receipts for each warehouse in which a product is stored. In order to record inventory receipts for products stored in multiple warehouses, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window.

To enter inventory receipts

Follow this procedure if the Enable Multi-Warehouses option on the Inventory System Setup window is disabled.

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory receipt, or accept the default system date.
3. Enter an Invoice #, such as the invoice number of the vendor's invoice.
4. Enter a brief Description of the product inventory receipt.
5. Enter the code of the Product received in inventory (select the Find icon to look up a product code). Receipts can be entered only for products that have an Active, Inactive, or Out of Production status.
6. Press Tab. The product's Description and Unit Cost display by default. The Description can be overridden if necessary.
7. Enter the Quantity of the product received in inventory.
8. (optional) Enter the Unit Cost of the product, or accept the default unit cost.
9. Press Tab, and repeat this process for each additional product inventory receipt you want to enter.
10. Click Save.

To enter inventory receipts for multiple warehouses

Follow this procedure if the Enable Multi-Warehouses option on the Inventory System Setup window is enabled.

1. From Enter and edit receipts and adjustments window, click New. The Receipt option is enabled by default.
2. (optional) Enter the Date of the product inventory receipt, or accept the default system date.
3. Enter an Invoice #, such as the invoice number of the vendor's invoice.
4. Enter a brief Description of the product inventory receipt.

5. Enter the Product code of the product received in inventory (select the Find icon to look up a product code). Receipts can be entered only for products that have an Active, Inactive, or Out of Production status.
6. Press Tab. The product's default Warehouse, Bin (if applicable), Description, and Unit Cost display by default.
7. Enter the Warehouse for which you are entering the inventory receipt (select the Find icon to look up a warehouse), or accept the product's default warehouse. You also can enter a warehouse that has not been pre-defined for the product:

   Entering a warehouse that has not been pre-defined creates a new warehouse record for that product.
8. Enter the warehouse Bin in which the product is stored, or accept the default bin.
9. (optional) Enter the product's Description, or accept the default product description.
10. Enter the Quantity of the product received in inventory at the warehouse.
11. Enter the Unit Cost of the product, or accept the default unit cost.
12. Press Tab, and repeat this process for each additional product inventory receipt you want to enter.
13. Click Save.

Entering inventory adjustments

Product inventory adjustments allow you to adjust your inventory records for stock items when you need to make corrections. For example, you may need to enter a product inventory adjustment after taking inventory of all products and discovering loss or damage that has decreased a product's physical inventory.

Inventory adjustments are entered just as inventory receipts are entered, and the only difference between the two is that negative quantities can be entered for inventory adjustments. Adjustments can be entered only for products with an Active, Inactive, or Out of Producton status, and iMIS automatically updates and adjusts your product inventory records when adjustments are posted.

As with all inventory transactions, manually posting inventory adjustments is recommended. To post inventory adjustments manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

As with inventory receipts, your method of storage determines how inventory adjustments are entered. In order to record inventory adjustments for a product stored in multiple warehouses, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window.

To enter inventory adjustments

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory adjustment, or accept the default system date.
3. Enter an Invoice # for the inventory adjustment.
4. Enter a brief Description of the product inventory adjustment.
5. Enable the Inventory Adjustment option.
6. Enter the code of the Product for which you are entering an inventory adjustment (select the Find icon to look up a product code). Adjustments can be entered only for products that have an Active, Inactive, or Out of Production status.
7. Press Tab. The product's Description and Unit Cost display by default. The Description can be overridden if necessary.
8. Enter the quantity of the inventory adjustment:

- Enter a positive amount in the Quantity field to increase a product's inventory.
- Enter a negative amount in the Quantity field to decrease a product's inventory.

9. Enter the Unit Cost of the product, or accept the default unit cost.
10. Press Tab, and repeat this process for each additional product adjustment.
11. Click Save to enter the inventory adjustment.

To enter inventory adjustments for multiple warehouses

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory adjustment, or accept the default system date.
3. Enter an Invoice # for the inventory adjustment.
4. Enter a brief Description of the product inventory adjustment.
5. Enable the Inventory Adjustment option.
6. Enter the code of the Product for which you are entering an inventory adjustment (select the Find icon to look up a product code). Adjustments can be entered only for products that have an Active, Inactive, or Out of Production status.
7. Press Tab. The product's Warehouse, Bin (if applicable), Description, and Unit Cost display by default.
8. Enter the Warehouse for which you are entering the inventory adjustment (select the Find icon to look up a warehouse), or accept the product's default warehouse.
9. Enter the warehouse Bin in which the product is stored, or accept the default bin.
10. (optional) Enter the product's Description, or accept the default product description.
11. Enter the quantity of the inventory adjustment:
    - Enter a positive amount in the Quantity field to increase a product's inventory.
    - Enter a negative amount in the Quantity field to decrease a product's inventory.
12. Enter the Unit Cost of the product, or accept the default unit cost.
13. Press Tab, and this process for each additional product adjustment.
14. Click Save to enter the inventory adjustment.

Entering inventory transfers

If you store individual products in multiple warehouses, iMIS Orders gives you the ability to record product inventory transfers from warehouse to warehouse.

Product inventory transfers may be necessary under a variety of circumstances. For example, a product's inventory at one warehouse may be insufficient to meet immediate customer demand. If another warehouse has excess inventory in stock, you may decide to transfer the excess inventory to the warehouse with insufficient inventory.

When product inventory transfers are posted, iMIS automatically updates and adjusts a product's inventory record for each warehouse involved in the transfer. As with all inventory transactions, manually posting inventory transfers is recommended. To post inventory transfers manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

To record inventory transfers for a product stored in multiple warehouses, the Enable Multi-Warehouses option must be enabled on the Inventory System Setup window.

To enter inventory transfers

Transfers can be entered only for products that have an Active, Inactive, or Out of Production status. If you select a To Warehouse that is not already assigned to the product, iMIS automatically assigns the warehouse once you save the inventory transfer and adds it to the product's Warehouses window. Entering or editing a Bin value on the Enter and edit receipts and adjustments window updates a product's Warehouses window for that To Warehouse.

1. From Enter and edit receipts and adjustments window, click New.
2. (optional) Enter the Date of the inventory transfer, or accept the default system date.
3. Enter an Invoice # for the inventory transfer.
4. Enter a brief Description of the product inventory transfer.
5. Enable the Transfer option. The From Warehouse, To Warehouse, and Bin (To Warehouse) fields display.
6. Enter the code of the Product that you are transferring (select the Find icon to look up a product code). Transfers can be entered only for products that have an Active, Inactive,

or Out of Production status.

7. Press Tab. The product's From Warehouse, Bin ('From Warehouse'), Description, and Unit Cost display by default.
8. Enter the product's From Warehouse. This is the warehouse from which inventory is transferred. Select the Find icon to look up a warehouse, or accept the product's default warehouse.
9. Enter the 'From Warehouse' Bin, or accept the default bin.
10. Enter the product's To Warehouse. This is the warehouse to which inventory is transferred. Select the Find icon to look up a warehouse.
11. Enter the product's To Warehouse Bin if applicable.
12. (optional) Enter the product's Description, or accept the default product description.
13. Enter the Quantity of the inventory transfer. The quantity entered cannot be a negative value or exceed the From Warehouse's total available inventory.
14. Click Save.

Opening and finding inventory transactions

Several options are available for opening and finding inventory transactions. If you know either the transaction number or transaction invoice number of the transaction you want to open, you can open the transaction directly on the Enter and edit receipts and adjustments window.

If you do not know the transaction number or transaction invoice number, you will have to search for the transaction.

To open inventory transactions

Follow this procedure if you know either the transaction number or transaction invoice number of the transaction you want to open.

1. From Enter and edit receipts and adjustments window, click Open or Find.
2. You have two options when opening inventory transactions:

- Enter the transaction number in the Transaction field, or
- Enter the transaction invoice number in the Invoice # field.

3. Click OK to display the transaction in the Enter and edit receipts and adjustments window.

To find inventory transactions using the Inventory Transaction list

Follow this procedure if you entered the inventory transaction during the current iMIS session, and the transaction still displays in the Inventory Transaction list.

1. From Enter and edit receipts and adjustments window, select the transaction you want to open from the Inventory Transaction list. The transaction displays on the Enter and edit receipts and adjustments window.

To find inventory transactions by date

Follow this procedure if you know the date the inventory transaction was entered.

1. From Orders, select Manage inventory> Enter and edit receipts and adjustments to open the Enter and edit receipts and adjustments window.
2. Click Open or Find.
3. Enter the transaction date in the Date field.
4. Click OK to display all inventory transactions entered on that date in the Inventory Transaction list.
5. Select the inventory transaction from the Inventory Transaction list.

To find product inventory transactions using the Post receipts window

If you do not know the transaction date or number of an inventory transaction, you can open the Post receipts window to display a list of all open, non-posted transactions.

1. From Orders, select Manage inventory> Post receipts to open the Post receipts window.

2. Find the inventory transaction number of the transaction you want to open.
3. From Orders, select Manage inventory> Enter and edit receipts and adjustments to open the Enter and edit receipts and adjustments window.
4. Enter the transaction number in the Transaction field.
5. Click OK to display the transaction in the Enter and edit receipts and adjustments window.

Editing and deleting inventory transactions

You have the ability to review, edit, and delete inventory receipts, adjustments, and transfers that have not been posted. Because posted inventory transactions cannot be edited, automatically posting inventory transactions is not recommended.

To post inventory transactions manually, disable the Automatically Post Inventory Receipts/Adjustments option on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

To edit product inventory transactions

1. From Orders, select Manage inventory> Enter and edit receipts and adjustments to open the Enter and edit receipts and adjustments window.
2. Open the product inventory transaction (see "Opening and finding inventory transactions") you want to edit.
3. Click Edit.
4. Make any necessary changes.
5. Click Save.

To delete product inventory transactions

1. From Orders, select Manage inventory> Enter and edit receipts and adjustments to open the Enter and edit receipts and adjustments window.
2. Open the product inventory transaction you want to delete.
3. Click Delete. A message displays prompting you to verify deleting the transaction.

4. Click Yes to delete the inventory transaction.

Posting inventory transactions

Upon entering a product inventory transaction and verifying that the transaction information is correct, a transaction can be posted. When an inventory transaction is posted, a product's inventory records are updated with the transaction information.

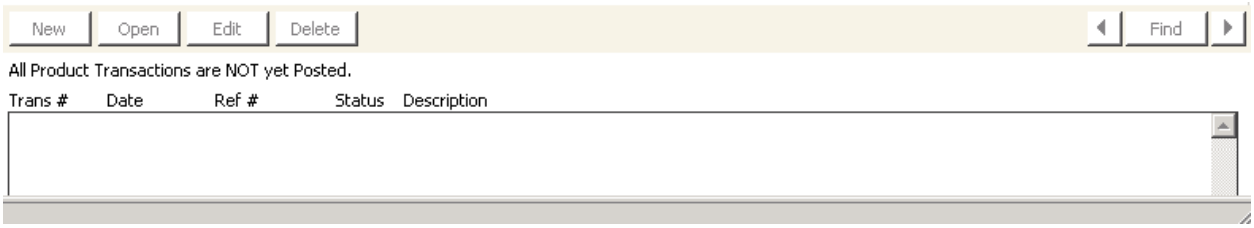
If you elect to post inventory transactions automatically (not recommended), all transactions are posted when they are entered and saved on the Enter and edit receipts and adjustments window. Automatically posting inventory transactions is not recommended because it does not allow you to review your transactions and make any necessary corrections before posting the transactions.

By posting transactions manually, you can verify and correct any errors before posting a transaction. This helps protect product inventory, backorder, and cost of goods sold information from inadvertent updates or changes. Inventory transactions are posted manually as long as the Automatically Post Inventory Receipts/Adjustments option is disabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

After verifying that your transaction information is correct, you can post your inventory transactions individually, in groups, or all at once using the Post receipts window (from Orders, select Manage inventory> Post receipts).

Note: Caution! Product inventory receipts, adjustments, and transfers can be posted only for products that have an Active, Inactive, or Out of Production status. If a product's status is changed to a status other than Active, Inactive, or Out of Production after a transaction has been entered for the product, the transaction will not display on the Post receipts window and cannot be posted.

Post receipts window



Admin Console: Home > Commerce > Post receipts
Desktop: Orders > Manage inventory > Post Receipts

Trans #

This column displays the transaction number for the product inventory transaction. iMIS generates the transaction number after the inventory transaction is entered.

Date

This column displays the date of the product inventory transaction.

Ref #

This column displays the number entered in the Invoice # field on the Enter and edit receipts and adjustments window.

Status

(read only) Displays the product's status. Inventory transactions can be posted only for products that have an Active, Inactive, or Out of Production status.

Description

This column displays the description entered in the Description field on the Enter and edit receipts and adjustments window.

Sort

(Not shown in example) Use this drop-down list to sort the product inventory transactions on the Post receipts window. The following sorting options are available:

- Trans # - Sorts by transaction number.
- Trans Date - Sorts by transaction date.

- Ref # - Sorts by invoice number.
- Description - Sorts by description.
- Entered By - Sorts according to transaction entry.

Post button

(Not shown in example) Click to post the selected product inventory transaction(s).

Posting transactions for multiple warehouses

While the process of posting inventory transactions for multiple warehouses and standard inventory is the same, you need to be aware of the following when posting transactions for multiple warehouses:

Removing warehouses

Once you remove a product's warehouse, you cannot post any outstanding, non-posted inventory transactions for that warehouse. If you post inventory transactions manually and remove a product's warehouse, all non-posted inventory transactions will be removed from the Post receipts window. However, non-posted inventory transactions will still display on the Enter and edit receipts and adjustments window (from Orders, select Enter and edit receipts and adjustments).

Inventory transfers

Transferring inventory from one warehouse to another affects both product cost and inventory field values when a transfer is posted.

Cost of Goods Sold - Regardless of whether the Average or Standard Cost valuation method is selected when the Cost of Goods Sold option is enabled on the Inventory System Setup window, the following rule applies when posting inventory transfers:

> **Note:** Caution! The extended amount of the transferred product cannot exceed the current total cost of the From Warehouse.

If the extended amount of the transferred product exceeds the current total cost of the From Warehouse, then iMIS will perform the following calculations:

1. The average cost of the From Warehouse will be multiplied by the quantity transferred in determining that the average cost does not exceed the total cost:
2. If the average cost does not exceed the total cost, then the extended amount will be recalculated by multiplying the average cost by the quantity transferred. The unit cost of the transferred product then will be updated by dividing the extended amount by the quantity transferred.
3. If the average cost does exceed the total cost, then the extended amount will equal the total cost of the product inventory. The unit cost of the transferred product then will be updated by dividing the extended amount by the quantity transferred.

   Field recalculation

   The following fields will be recalculated when transferring inventory from one warehouse to another:

- From Warehouse

  Qty on Hand (Manage products window) will be reduced by the Quantity (Enter and edit receipts and adjustments window) transferred.

  Total cost (Warehouses window) will be reduced by the Ext Amt (Enter and edit receipts and adjustments window) of the product transferred.

  Avg/Std cost (Warehouses window) will be updated by dividing the Total cost (Warehouses window) by the Qty on Hand (Manage products window).

- To Warehouse

  Qty on Hand (Manage products window) will be increased by the Quantity (Enter and edit receipts and adjustments window) transferred.

  Total cost (Warehouses window) will be increased by the Ext Amt (Enter and edit receipts and adjustments window) of the product transferred.

  Avg/Std cost (Warehouses window) will be updated by dividing the Total cost (Warehouses window) by the Qty on Hand (Manage products window).

  To post inventory transactions

1. From Orders, select Manage inventory> Post receipts to open the Post receipts window.
2. (optional) Sort the inventory transactions using the drop-down list.
3. Select the transaction(s) you want to post.
4. Click Post. A message displays prompting you to verify posting the selected transaction (s).
5. Click Yes to post the transaction(s). A Product Posting report generates automatically.

Viewing product inventory

After posting product inventory transactions, you can view your updated product inventory on the Manage products window.

To view product inventory

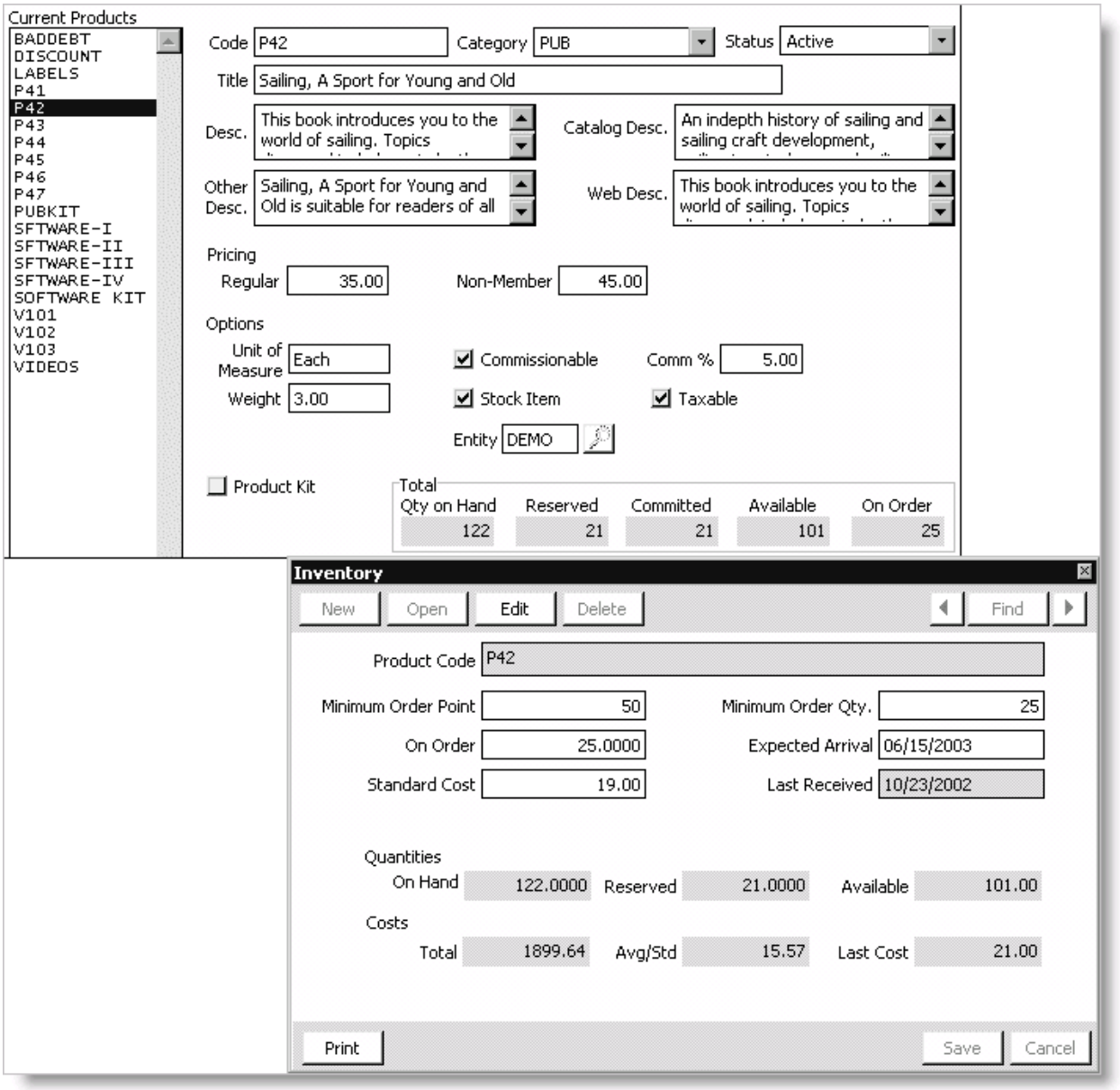
1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product to view its current inventory:

- The Qty on Hand field displays the total number of products in inventory.
- The Reserved field displays the number of products that are in “open order” status including backorders.
- The Committed field displays the number of shippable products in inventory excluding backorders.
- The Available field displays the number of products on hand minus reserved products.
- The On Order field displays the number of products on order from suppliers.

3. Click Inventory to open the Inventory window. The inventory data on the Inventory window will match the inventory data on the Manage products window for a product's inventory:

- The On Order field displays the number of products on order from suppliers.
- The Expected Arrival field displays the date the order is expected to arrive.

- The Last Received field displays the date an inventory receipt was posted.
- The On Hand field displays the total inventory transactions entered.
- The Reserved field displays the number of products that are in “open order” status including backorders.
- The Available field displays the number of products on hand minus reserved products.



Example of a product's inventory displayed on both the Manage products and Inventory windows

To view product inventory for multiple warehouses

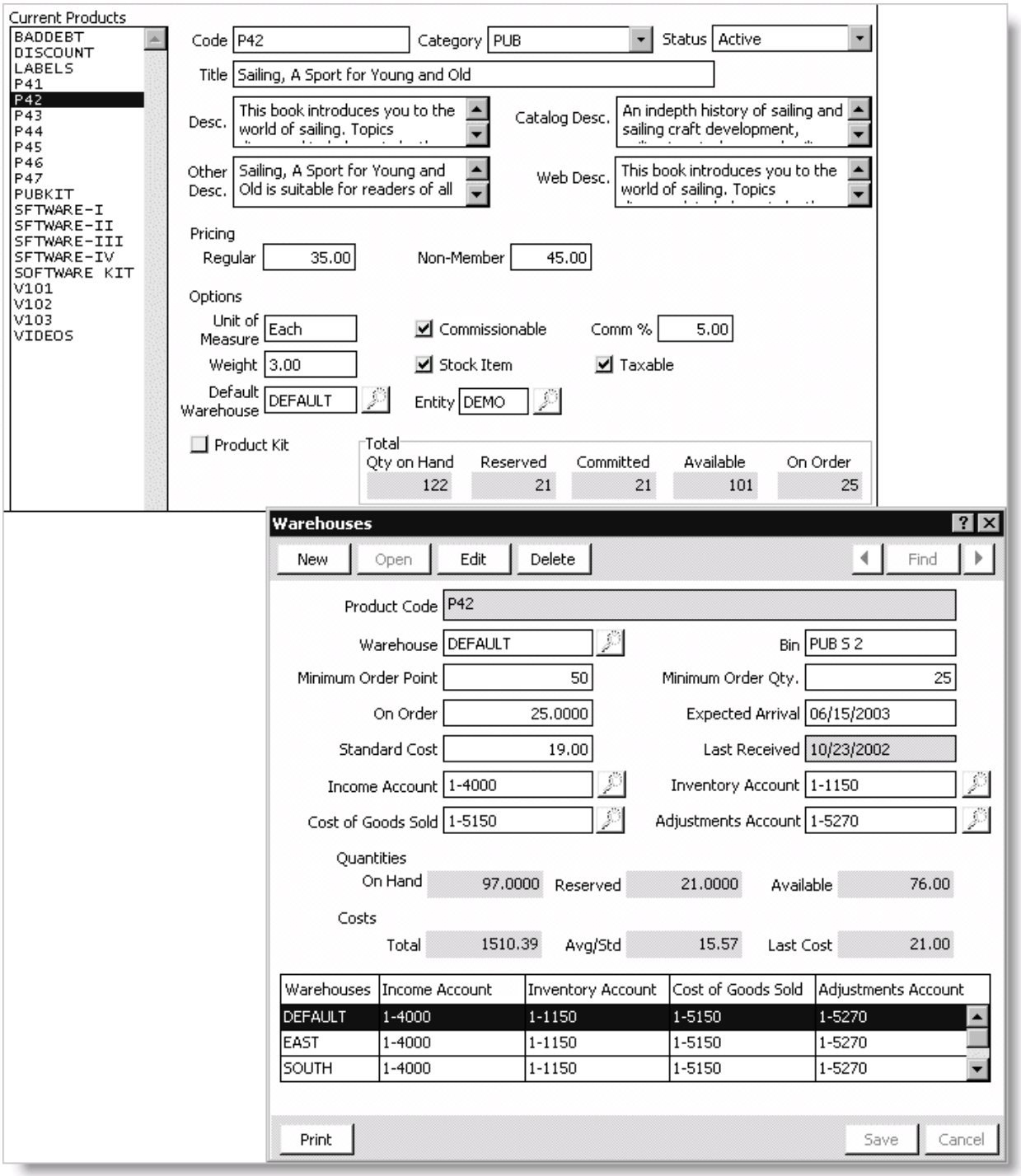
1. From Orders, select Manage inventory> Manage products to open the Manage products window.
2. Select a product to view its current inventory:

- The Qty on Hand field displays the total number of products in inventory across all warehouses.
- The Reserved field displays the total number of products that are in “open order” status across all warehouses including backorders.
- The Committed field displays the number of shippable products in inventory across all warehouses excluding backorders.
- The Available field displays the total number of products on hand across all warehouses excluding reserved products.
- The On Order field displays the total number of products on order from suppliers across all warehouses.

3. Click Warehouses to open the Warehouses window. The combined inventory data on the Warehouses window will match the total inventory data on the Manage products window for a product's inventory.

- The On Order field displays the number of products on order from suppliers for a warehouse.
- The Expected Arrival field displays the date the order is expected to arrive for a warehouse.
- The Last Received field displays the date an inventory receipt was posted for a warehouse.
- The On Hand field displays the total inventory transactions entered for a warehouse.

- The Reserved field displays the number of products that are in “open order” status for a warehouse including backorders.
- The Available field displays the number of products on hand for a warehouse excluding reserved products.



Example of a product's inventory displayed on both the Manage products and Warehouses windows

Backorders

The backorder feature of iMIS Orders allows you to place products with insufficient inventory in backorder status. When you enter an order for a product with insufficient inventory to fill the order, the unavailable items are placed on backorder. For example, if a customer orders 15 products but only 10 are available, you can place the five that are unavailable on backorder.

You can release backorders automatically if you enable the Automatic Backorder Processing option on the Backorder Processing window (from Orders, select Set up module, and click Backorders). When this option is enabled, backordered products are released automatically when you enter and post inventory receipts. However, you still have the ability to release backorders manually. For example, when you have an open order with a backordered product, you can release the backorder to print the shipping papers listing the quantity you project to ship with the order.

As long as the shipping papers have not been printed, products on backorder are released automatically to their next order processing stage when you post inventory receipts. Released orders are listed on the Product Posting report.

Processing backorders automatically

iMIS projects an order's shippable status based on product inventories when the Automatic Backorder Processing option is enabled on the Backorder Processing window (from Orders, select Set up module, and click Backorders).

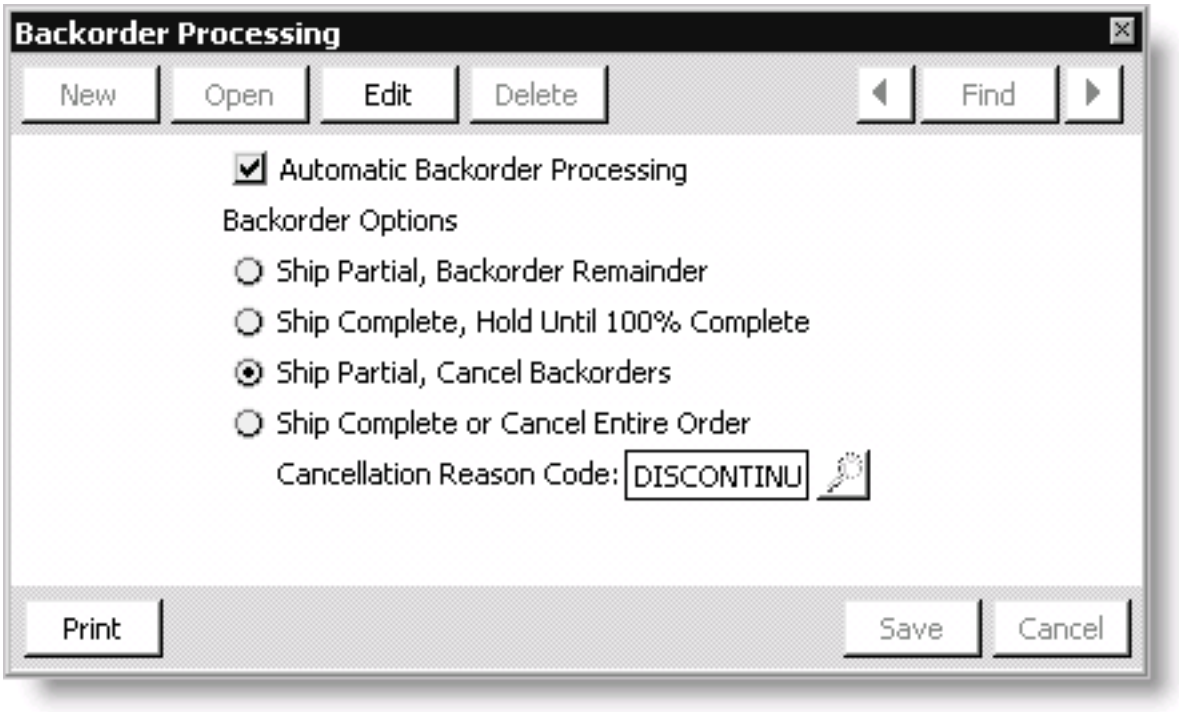
When you enable the Automatic Backorder Processing option, iMIS compares a product's available inventory to its ordered inventory. If the quantity available is equal to or greater than the quantity ordered, the Ship field displays the quantity entered in the Order field on the Enter and edit orders window.

If the quantity available is not equal to or greater than the quantity ordered, the Ship field displays the product quantity available, if any, and the Back field displays the calculated difference between the Order and Ship fields.

A product's available inventory determines its projected ship and backorder quantities. The Available inventory equals the difference between the Qty on Hand and the Reserved inventory as displayed on the Manage products window (from Orders, select Manage inventory > Manage products).

A backorder is an order of which 100 percent of the products ordered are not available for shipping. A partially shippable order is one of which at least one unit of any product line-item is available for shipping while at least one unit is out of stock and cannot be shipped.

Backorder Processing window



From Orders, select Set up module, and click Backorders

Automatic Backorder Processing

Enable to release backorders automatically when you enter and post product inventory receipts.

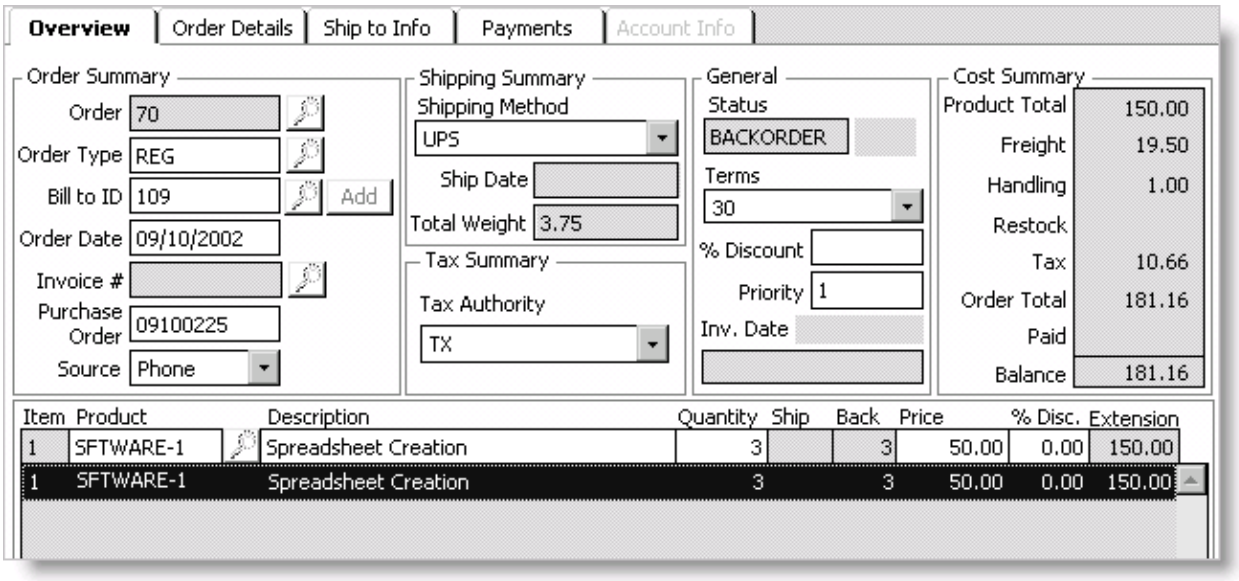
Backorder Options

When you enable Automatic Backorder Processing, you have several Backorder Options that you can enable on the Backorder Processing window. The Backorder Options allow you to define specific parameters for how iMIS processes backorders:

Ship Partial, Backorder Remainder

The Ship Partial, Backorder Remainder option enables by default when you use Automatic Backorder Processing and is the most widely used backorder processing option. The Ship Partial, Backorder Remainder option performs the following backorder processing tasks when enabled:

- Backorder Entire Order - When all of the products ordered are on backorder, iMIS automatically places the order in backorder status. When any ordered products become available through posted inventory receipts, the order is released from backorder status to the first processing stage for the given order type. If any of the ordered products remain on backorder, the order follows the processing steps for a partially shippable order.



Example of a backorder

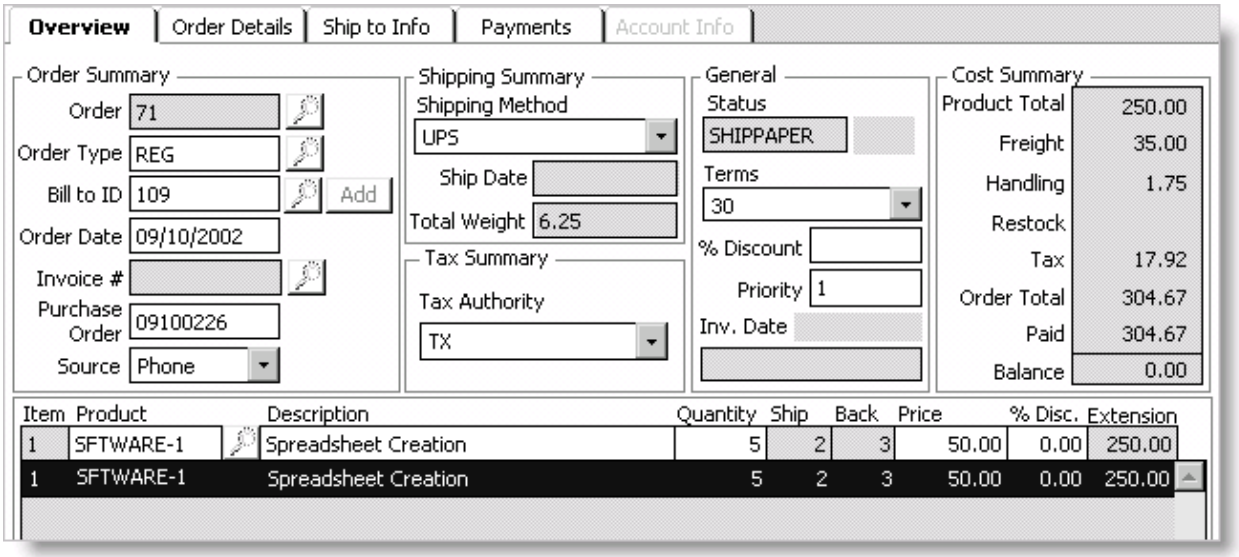
- Ship Partial Order - When some of the products ordered are on backorder, iMIS automatically places the order in the first processing stage for the given order type, such as

PICKLIST, SHIPPAPER, or INVOICE, as with complete orders.

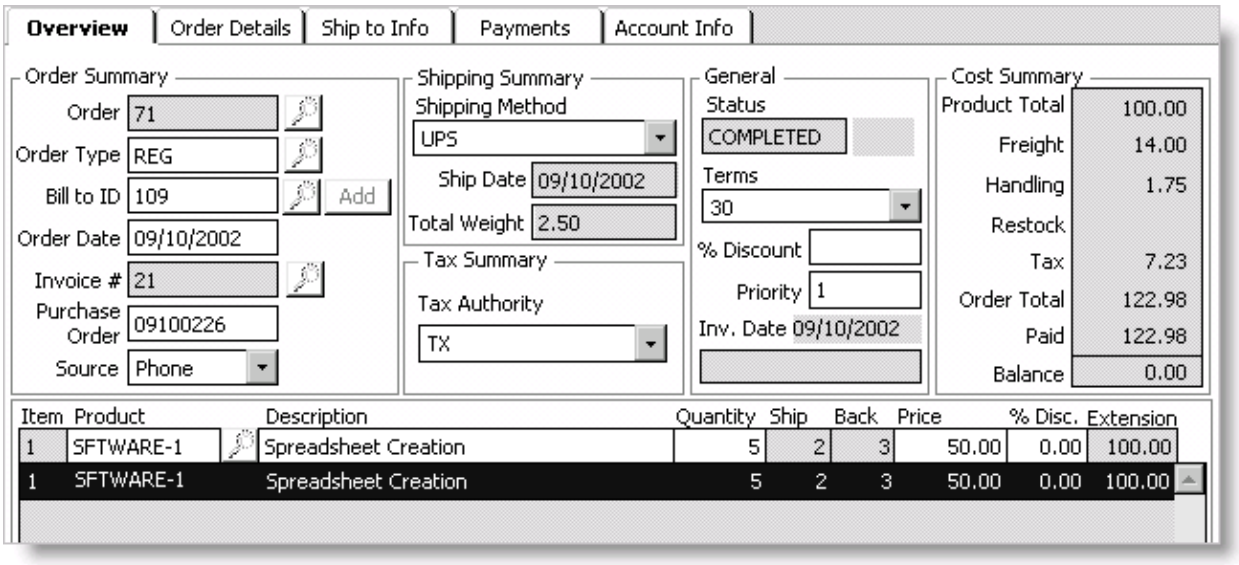
If one or more of the ordered products remain backordered when the order is invoiced, iMIS proceeds with the following steps during the invoicing stage:

- iMIS recalculates the original order's product totals to include only the quantities actually shipped.
- iMIS generates an extended suborder, which is assigned the original order transaction number plus .01, such as 208.01. The extended suborder consists only of the back-ordered products remaining when the original order was invoiced. The original order retains the backordered product's product code with an Extension price of 0.00 as displayed on the Enter and edit orders window.
- Any prepaid cash amounts are split appropriately between the original order and the extended suborder. The original order's cash amount equals the lesser of the full cash amount or the invoiced total. All remaining cash applies to the extended suborder.

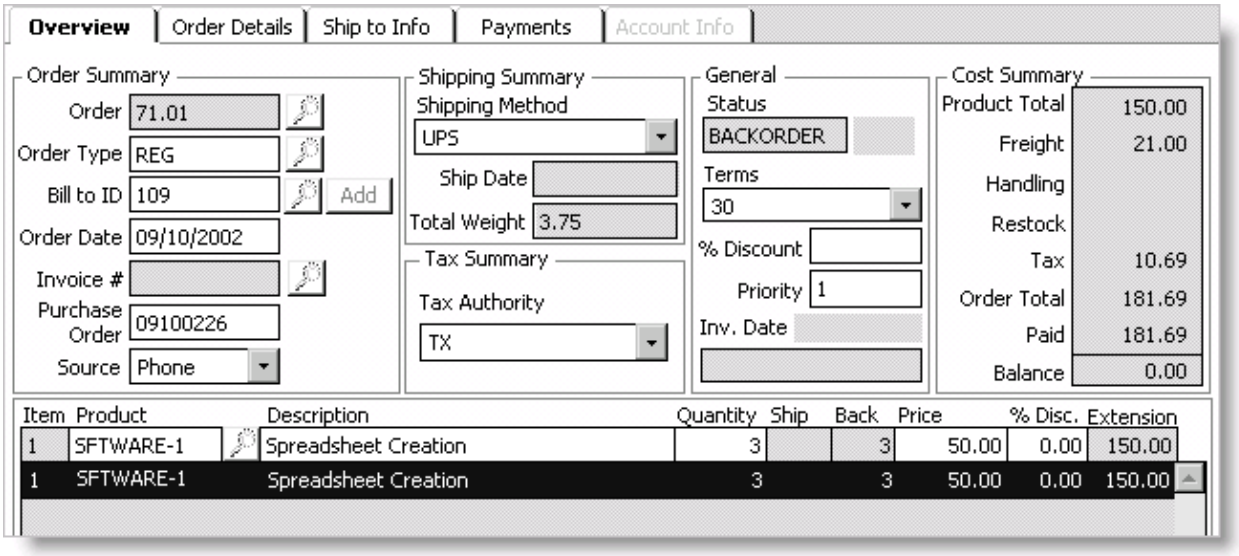
  Note: An extended suborder can continue to generate additional extended suborders for products that remain on backorder.



Example of a partially shippable order with full payment before invoicing



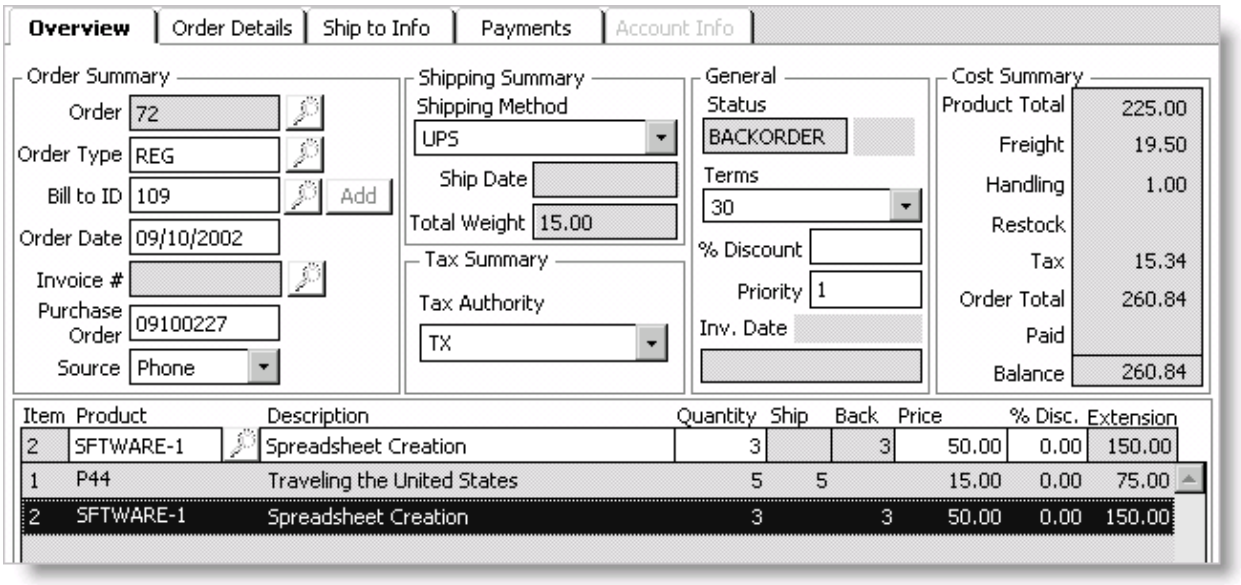
Example of a partially shipped order after invoicing. Note that the Extension price does not reflect the backordered products. Taxes were recalculated for the shipped products, and only the cash relevant to the shipped total is applicable for the order.



Example of an extended suborder, Order # 208.01, generated for Order # 208. Note that the remaining prepaid cash has been applied to suborder 208.01. Handling fees are charged on original orders and not on extended suborders.

Ship Complete, Hold Until 100% Complete

If you enable the Ship Complete, Hold Until 100% Complete option, iMIS does not ship an order until all ordered products are available in inventory. Orders for products with insufficient inventory are placed on backorder whether or not the products are fully backordered or partially shippable. No extended suborders are generated because the order does not have any backordered quantities remaining when it is shipped and invoiced.

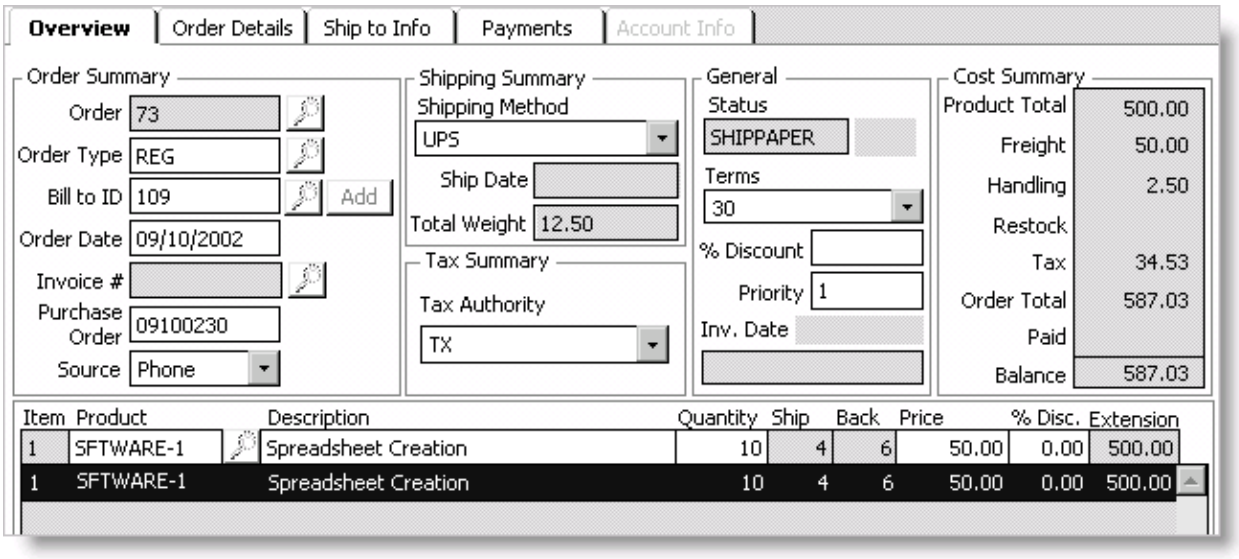


Example of a partially shippable order in backorder status when the Ship Complete, Hold Until 100% Complete option is enabled

Ship Partial, Cancel Backorders

If you enable the Ship Partial, Cancel Backorders option, iMIS treats backorders as normal orders upon data entry. However, unlike complete and ship partial orders, you are prompted to cancel the backordered products (or the entire order if it is completely backordered) at the Invoice orders processing stage.

If you do not cancel the backordered products when invoicing the order, an extended suborder is generated for the backordered products. The original order then goes automatically to the first processing stage for the given order type, such as PICKLIST, SHIPPAPER, or INVOICE.



Example of a partially shippable order before invoicing when the Ship Partial, Cancel Backorders option is enabled

Ship Complete or Cancel Entire Order

If you enable the Ship Complete or Cancel Entire Order option, you can cancel partial or completely backordered orders at order entry. When an order is entered for any product on backorder, a message displays prompting you to cancel the order instead of generating a backorder. If you elect not to cancel the order, the order does not ship until all products are available in inventory just as if the Ship Complete, Hold Until 100% Complete option were enabled.

Cancellation Reason Code

(Displays when the Ship Partial, Cancel Backorders option is enabled) Enter a reason code for canceling orders. Select the Find icon to look up a cancellation reason code.

Cancellation reason codes are defined on the CANCELLATION general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

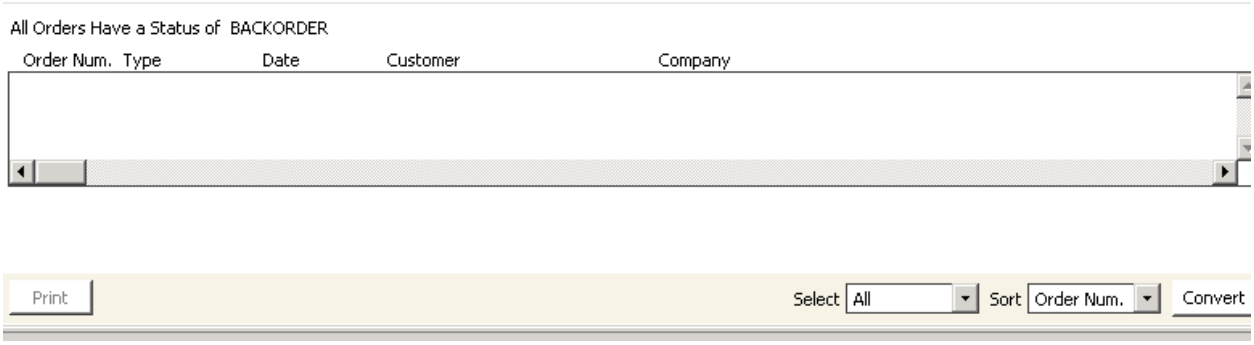
Releasing backorders

When you release backorders, iMIS applies the product received in stock to items with a backorder status based on the Priority entered for the order. This is displayed in both the

Back and Ship fields on the Overview tab of the Enter and edit orders window. You have several methods that you can use to release backorders:

- Release backorders by posting product receipts
- Release backorders after printing shipping papers
- Release backorders by editing open orders
- Release backorders manually

Release backorders window



Admin Console: Home > Commerce > Release backorders
Desktop: Orders > Process Orders > Manually release backorders

Releasing backorders by posting product receipts

The primary method for releasing backorders is to post product receipts. If a product's quantity on hand is less than its reserved quantity (a product's total open order quantity) at the time the product's receipts are posted, iMIS checks for backorders and commits products to them.

If a product's inventory remains insufficient for filling all backorders after posting receipts, the receipts are applied to orders in priority order, such as the oldest orders receiving priority over the newest orders for the given priority. Priority 1 is the highest priority as defined in the Priority field on the Enter and edit orders window. Orders with no priority assigned (the Priority field is left blank) are the last orders filled and sort in date order, oldest to newest.

All orders with committed receipts print on the receipts posting report, indicating the quantity committed to them and the stage or status of the order when the receipts are posted.

If shipping papers have been printed for a partially shippable order, iMIS commits the appropriate quantity to the order. However, iMIS does not move the committed quantity from the Back field to the Ship field as displayed on the Enter and edit orders window.

Partially shippable orders for which shipping papers have been printed are handled differently than other partially shippable orders because the shipping personnel dictate the product quantity that actually ships. For example, the shipping personnel may decide to ship the actual quantities indicated, or they may decide to override the shipped quantities and ship a different amount.

In either case, iMIS must wait for specific shipping instructions for processing the order. The best alternative in this situation is to enter the revised shipped quantities when the shipment entry is recorded if a manual override is processed. If the quantities are not revised, iMIS generates a shippable order when the order is invoiced.

To release backorders after printing shipping papers

When the Automatic Backorder Processing option is enabled, backorders move to the appropriate order processing stage for the given order type when the backordered product's inventory transaction is posted. The only time this does not happen automatically is if the order has been converted through the Print shipping papers processing stage.

After you print the shipping papers for an order with backordered products, you must edit the shipped and backordered products on the Ship Order window. For example, if you place an order for 25 products but only 20 are in stock, and then you print the shipping papers for the order, you will need to edit the Ship and Back quantities on the Ship Order window at the Ship orders processing stage.

1. From Orders, select Process orders > Print shipping papers to open the Print shipping papers window.

2. Select the order with products on backorder.
3. Click Convert, and move the order to the Ship orders processing stage.
4. Enter and post a receipt for the backordered product (see "Posting inventory transactions").
5. Review the effect of the inventory receipt on the product's inventory (see "Viewing product inventory").
6. From Orders, select Process orders > Ship orders to open the Ship orders window.
7. Double-click the order to open the Ship Order window.
8. Edit the number of products that you are shipping in the Ship field.
9. Press Tab to update the number of products on backorder as displayed in the Back field.
10. Click OK.

To release backorders by editing open orders

If necessary, you can edit the ship quantities and, by default, backorder quantities of any open order before invoicing the order. For example, if you forgot to release an order's backorders before reaching the Invoice orders processing stage, you still can edit the ship quantities as long as you do not invoice the order.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for which you want to release backordered products.
3. Click Edit.
4. Select the product you want to release from backorder from the Product List field.
5. While pressing Shift, edit the quantity in the Ship field.
6. Press Tab to update the quantity in the Back field.
7. Click Save.

> **Note:** Note: Select a product line-item in the Product List field to display a product's available inventory at the bottom of the Overview tab. If you are using multiple warehouses, a product's total available inventory and warehouse inventory display.

Releasing backorders manually

Backorders can be converted to shippable orders using the Manually release backorders processing stage (from Orders, select Process orders > Manually release backorders). Released backorders are removed from the holding stage for orders awaiting inventory and are returned to the appropriate order processing stages for the given order types.

You would use the Manually release backorders processing stage only in rare instances. For example, you would use this function if you did not have the opportunity to enter and post product inventory receipts before processing an order or if a difference existed between perpetual and physical inventory.

You can release backorders manually even if you enable Automatic Backorder Processing. For additional information about releasing backorders manually, see "Manually release backorders").

Backordering product kits

Product kit inventory must be complete before an order for a product kit can move to the next order processing stage. For example, if a kit consists of three videos and only two are available in inventory, the entire kit will be on backorder.

Regardless of any Automatic Backorder Processing options enabled, backordered kits override the selected options. For example, if you enable the Ship Partial, Backorder Remainder option, the backordered kit overrides the option because you cannot ship partial kits.

If an order contains a product kit as well as one of the kit components, the order will be processed, but the inventory count will be inaccurate. This can result in a backorder not generating. See Preventing duplicate product line-items for more information.

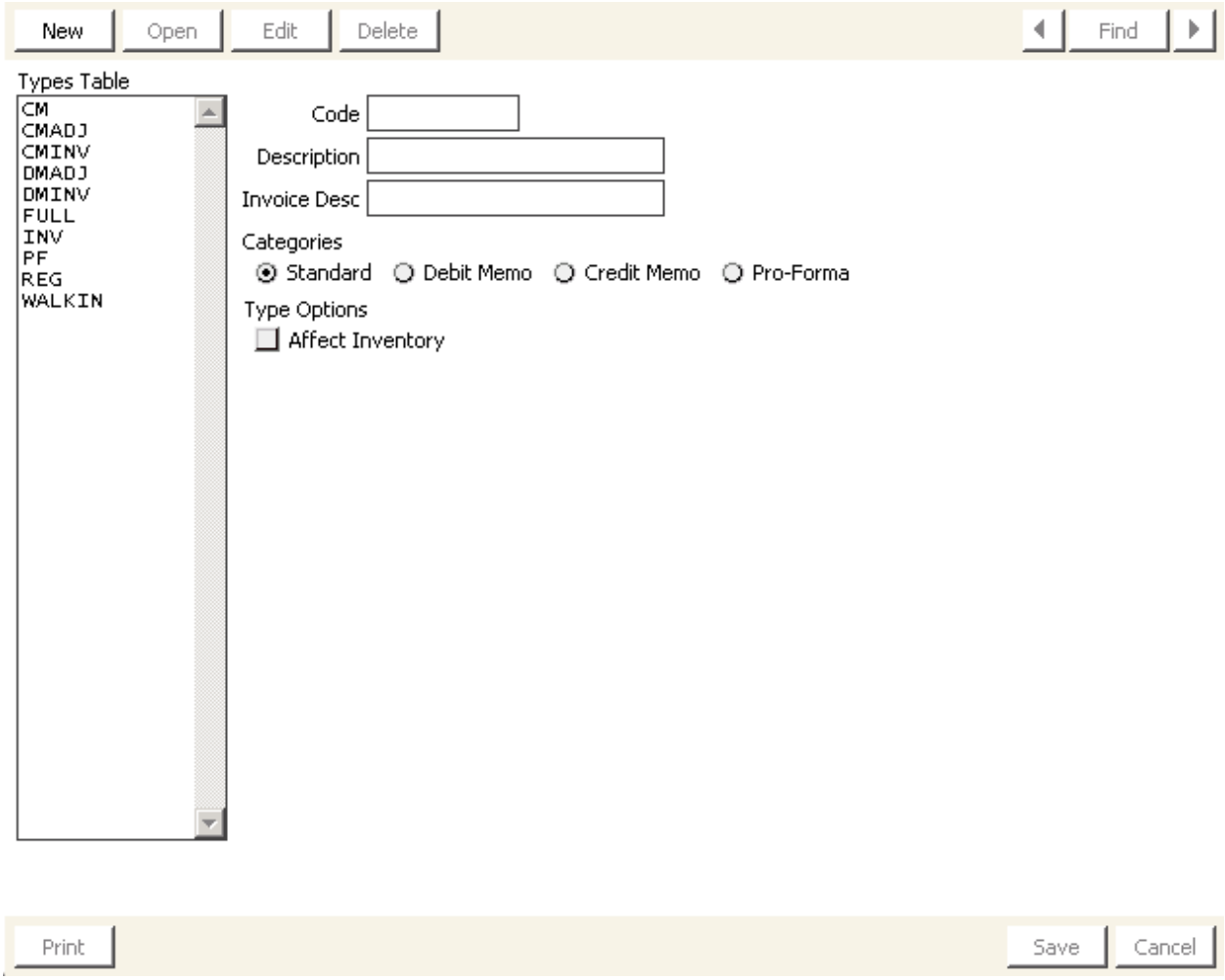
Orders: Set up tables

Order types determine the processing stages for orders, and you must define your order types before you can enter and process orders. Each time you enter a product order, you must select a defined order type. Order types that have been assigned orders cannot be deleted.

Order types fall into one of four system-defined order type categories: Standard, Debit Memo, Credit Memo, or Pro-Forma. You can define an unlimited number of order types for each order type category.

The category selected for an order type determines the available Type Options, or order processing stages, for the order type. Of the available Type Options, you select which are required, and you determine if an order type affects inventory. Order types are defined on the Set up order types window.

Set up order types window



Admin Console: Configure > Commerce > Set up tables > Set up order types

Desktop: Orders > Set up tables > Order types

Types Table

This list displays the defined order types.

Code

Enter the code for an order type.

Description

Enter a description of the order type.

Invoice Desc

Enter a description of the invoice generated for the order type. The description entered in the Invoice Desc field prints on invoices.

Categories

Order types are classified according to one of the following four system-defined categories. You must enable one of the categories for each order type you define. The category selected determines which Type Options display when defining an order type.

- Standard - Enable to classify an order type as a standard order.
- Debit Memo - Enable to classify an order type as a debit memo order.
- Credit Memo - Enable to classify an order type as a credit memo order.
- Pro-Forma - Enable to classify an order type as a pro forma order. Create pro forma order types only after defining standard order types. This allows you to specify a valid standard order type in the Convert to Order Type field on the Order Status Defaults window (from Orders, select Set up module, and click Order Staging) for converting pro forma orders to standard orders.

Type Options

These options allow you to define the order processing stages for an order type. An order type's category determines the Type Options that display on the Set up order types window:

- Affect Inventory - Enable if you want the order type to affect product inventory. For example, a standard order would reduce a product's physical inventory, and a credit memo order would increase a product's physical inventory if the Affect Inventory option were enabled.
- Print an Invoice - Enable if you want the order type to generate a printed invoice for invoiced orders.
- Pick List - (Displays for standard orders only) Enable to process the order type through the Print pick list order processing stage. A Pick List will print for the order type.

- Shipping Paper - (Displays for standard orders only) Enable to process the order type through the Print shipping papers order processing stage. Shipping papers (Packing Slips) will print for the order type.
- Print a Quote - (Displays for pro forma orders only) Enable to process the order type through the Print quotes order processing stage. An order Quotation will print for the order type.
- Convert to Order Type - (Displays for pro forma orders only) Enter the default order type for converted pro forma orders.

To define order types

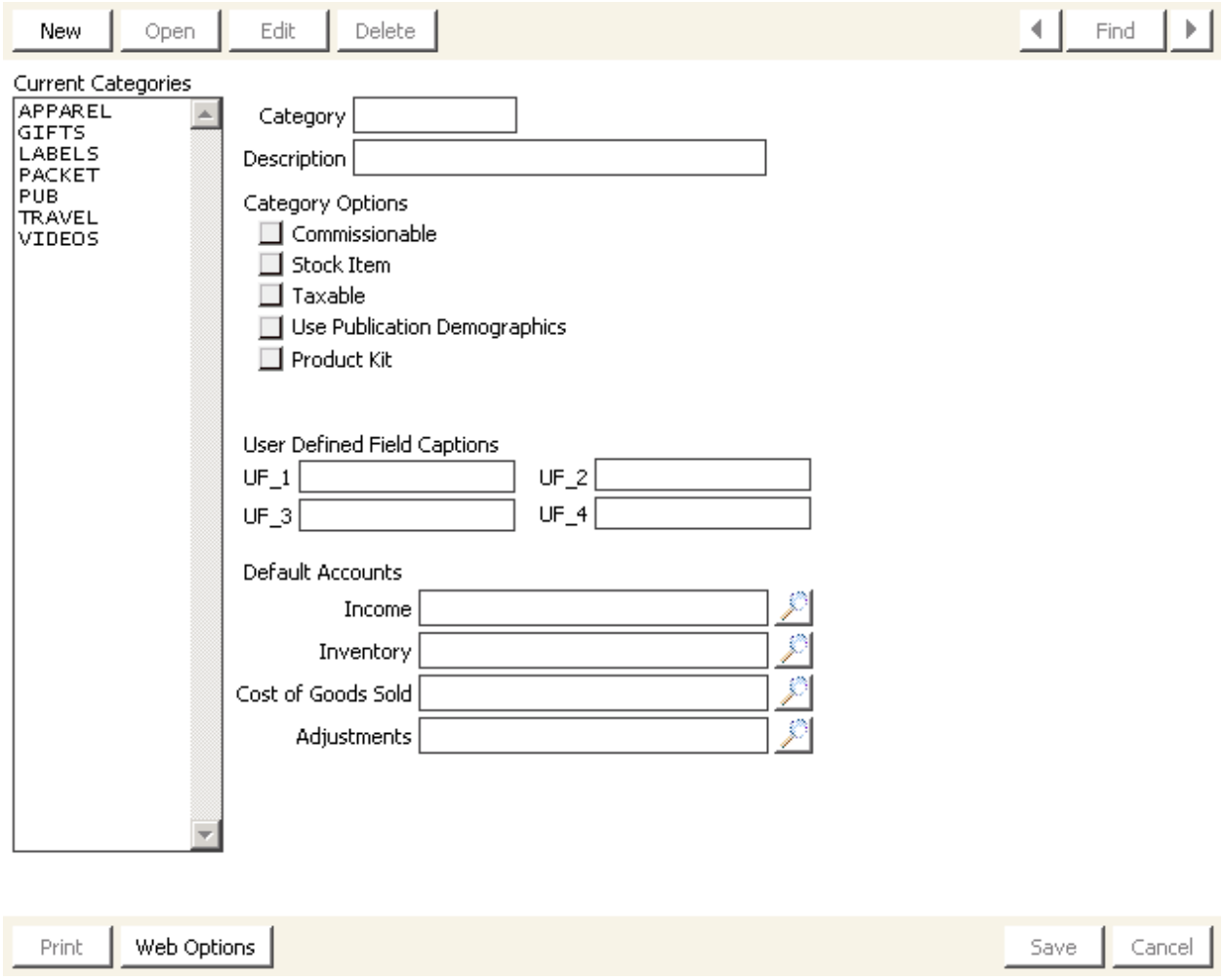
1. From Set up order types window, click New.
2. Enter a Code for the order type.
3. Enter a Description for the order type.
4. Enter a description of the invoice in the Invoice Desc field.
5. Select a category for the order type from the list of Categories.
6. Enable the applicable Type Options.
7. Click Save.

Product categories setup

Product categories allow you to classify your products, and you must define your product categories before defining your individual products. Each time you define a product, you must assign it to one of your product categories.

Product categories are used to assign default accounts and to enable category options for groups of products.

Set up product categories window



Admin Console: Configure > Commerce > Set up tables > Set up product categories

Desktop: Orders > Set up tables > Product categories

Current Categories

This list displays the defined product categories.

Category

Enter a code for the product category.

Description

Enter a description of the product category.

Category Options

Enable the options that you want enabled by default when defining new products on the Manage products window (from Orders, select Manage inventory> Manage products). You can override all settings at the product level.

- Commissionable - Enable if you want the sale of a product within a category to generate a commission. The Comm % field displays when you enable the Commissionable option.
- Comm % - (Displays only when the Commissionable option is enabled) Enter the default commission rate generated by the sale of a product in this category. For example, a 5.00 % commission rate would generate a $5.00 commission on a $100.00 sale. Make sure to enter the rate as a percentage and not as a decimal.
- Stock Item - Enable to indicate that products within this category have physical inventory. You can track inventory only for items stocked in inventory.
- Taxable - Enable to indicate that the product category is taxable.
- Use Publication Demographics - Enable to define publication demographic information for a category's products. If the option is enabled, the Publication button displays and enables on the Manage products window for products belonging to that category. Clicking the Publication button on the Manage products window opens the Publication Demographics window used for defining demographic information for publications.
- Product Kit - Enable to indicate that the product category consists of product kits.

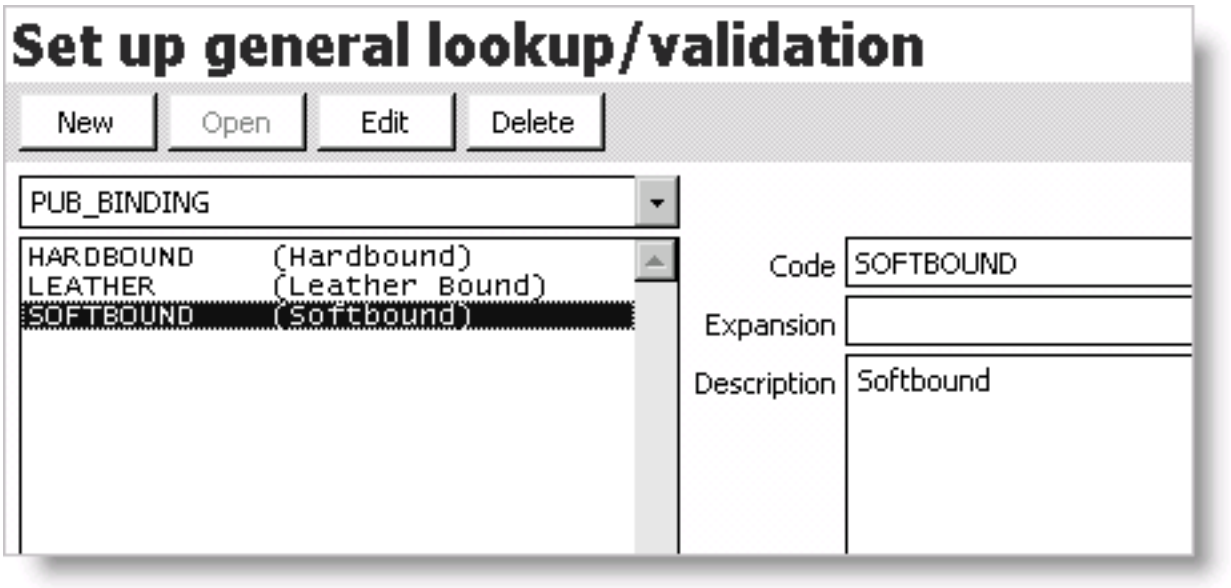
User Defined Field Captions

(optional) Enter captions in the UF_1, UF_2, UF_3, and UF_4 fields that will display on the Product Detail window. Each caption that you define generates a text box on the Product Detail window for products belonging to that category. You can define the same or different captions for any product category.

When entering or editing an order, some products may require additional order information before an order can be shipped. The user-defined fields on the Product Detail window allow you to record this additional information.

You also have the ability to define general lookup/validation tables for each of the user-defined fields, and any predefined data can be accessed by selecting each field's Find icon on the Product Detail window. Regardless of whether general lookup/validation tables have been set up, you always have the ability to enter any necessary order information.

General lookup/validation tables are set up for product category user-defined fields by combining the product category codes and field labels defined on the Set up product categories window. When setting up a table for a user-defined field, the product category code and field label must be separated by an underscore. For example, if the product category code is PUB and the field label is Binding, the general lookup/validation table for the user-defined field would be PUB_BINDING as displayed in the following example:



Example of a general lookup/validation table set up for a user-defined field

Default Accounts

These accounts allow you to define the default accounts for products within this category. You can override the accounts at the product level on the Accounting window and at the warehouse level on the Warehouses window if Multi-Warehouses is enabled.

When defining product-level accounts, the most specific accounting information takes precedence. For example, iMIS first looks for warehouse level accounts. iMIS then looks for product level accounts. If you have not defined product-level accounts, iMIS uses the default product category accounts. If you have not defined default product category accounts, iMIS uses the accounts defined on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).

- Income - Enter a product category's default income account number.
- Inventory - Enter a product category's default inventory account number.
- Cost of Goods Sold - Enter a product category's default cost of goods sold account number.
- Adjustments - Enter a product category's default adjustments account number.

Web Options button

Opens the Web Options window for the selected product category. The Web Options window is used for enabling products either for sale or for viewing on the Web.

To define product categories

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Click New.
3. Enter a code for the product category in the Category field.
4. Enter a Description of the product category.
5. Enable the applicable Category Options.
6. Enter the User Defined Field Captions that will display and generate text boxes on the Product Detail window.
7. Enter any applicable Default Accounts.
8. Click Save.

To define product categories for kits

If you are licensed for product kitting, iMIS Orders allows you to sell product kits. A kit consists of multiple products sold as a single unit for a single price.

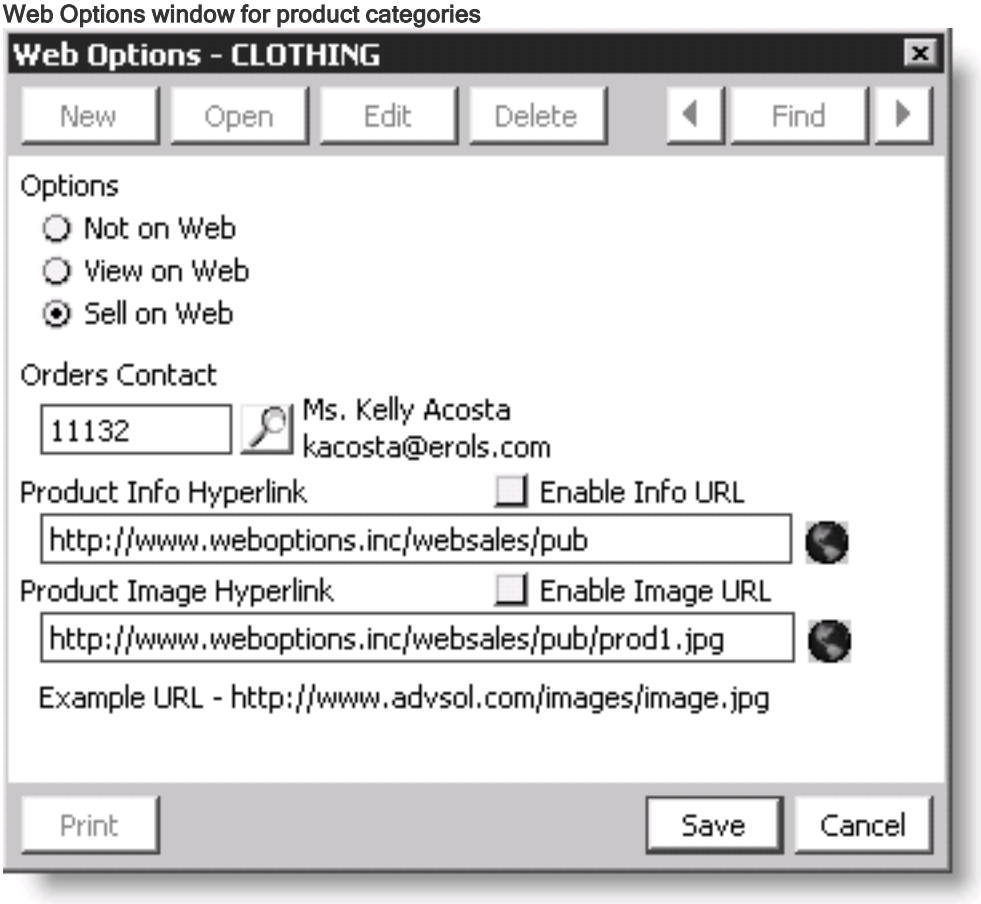
If you plan to sell product kits, you can define product categories that set default options on the Manage products window, such as Commissionable, Taxable, and Product Kit. After defining your product kit categories, you can define your product kits.

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Click New.
3. Enter a code for the product category in the Category field.
4. Enter a Description of the product category.
5. Enable the applicable Category Options.
6. Enable the Product Kit option.
7. Enter any applicable Default Accounts.
8. Click Save.

Enabling product categories for the web

You can enable product categories to be viewed or sold on the web using the Web Options window (Orders > Set up tables > Product categories, select a category, and click Web Options). Individual products can also be enabled for the web (see "Enabling products for the web").

Web Options window for product categories



From Orders, select Set up tables > Product categories, select a category, and click Web Options

Options

The viewing option selected at the product category level overrides the viewing option selected at the product level for web products (Orders > Manage inventory > Manage products, select a product and click Web).

- Not on Web - Prevents the category from being viewed or sold on the Web.
- View on Web - Allows the category to be viewed, but not sold, on the Web.
- Sell on Web - Allows the category to be viewed and sold on the Web.

Orders Contact

Specifies the contact to notify when purchases from this category are made.

> **Note:** Note: You can specify a contact to notify about web purchases in the E-mail address to notify when a product is sold field on the Organization Configuration window (System Setup > Set up web components > Organization Configuration).

Product Info Hyperlink

Enter a URL to information about the product category. Click the web icon to view the product category's information on the web.

Enable Info URL

Enable to enable the hyperlink to the product category's information.

Product Image Hyperlink

Enter a URL to an image representing the product category. Click the web icon to view the product category image on the web.

Enable Image URL

Enable to enable the hyperlink to the product category's image.

To enable a product category for the Public view

1. From Orders, select Set up tables > Product categories to open the Set up product categories window.
2. Select a product category from the list of Current Categories.
3. Click Edit.
4. Click Web Options to open the Web Options window.
5. Enable the product for the Web:

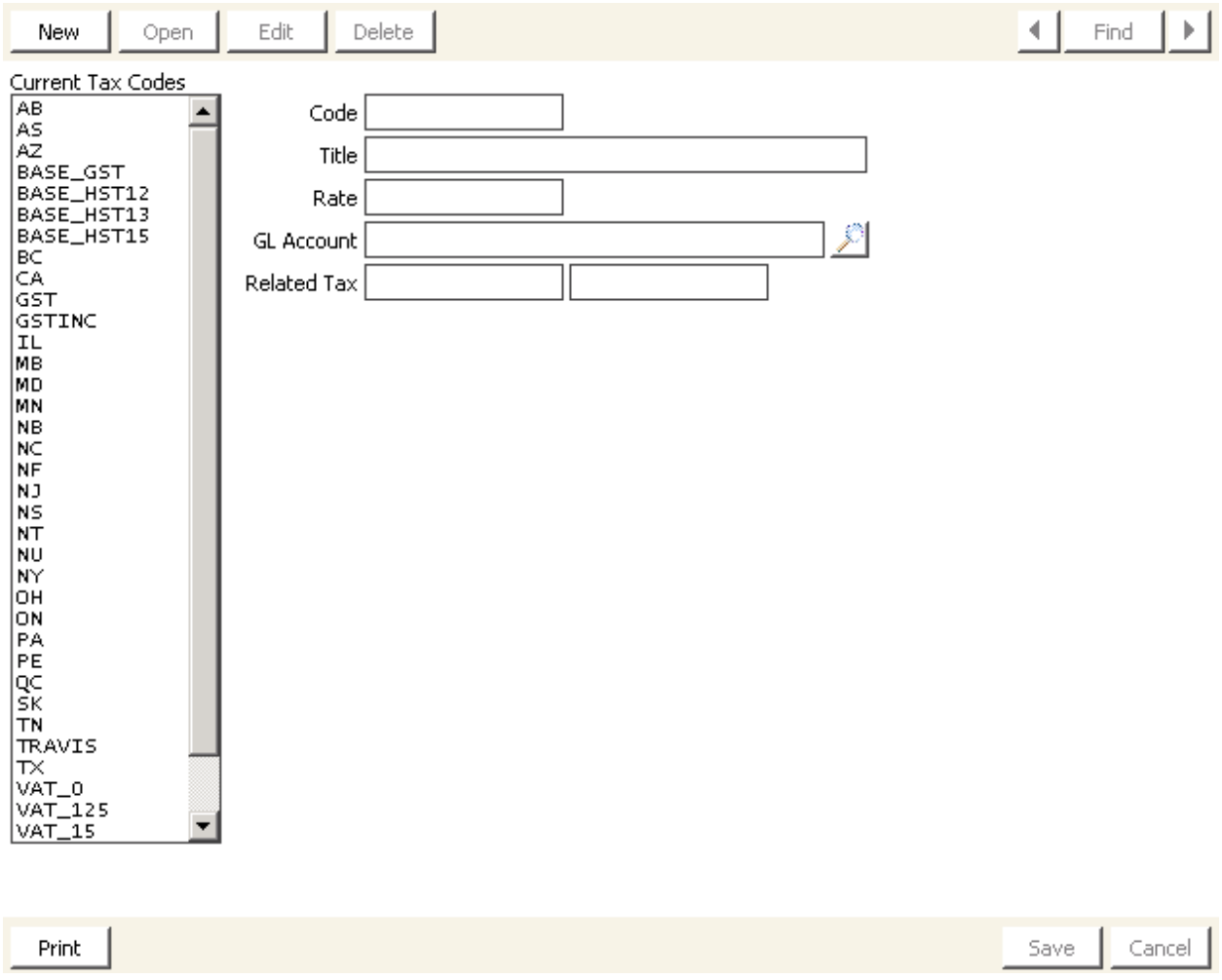
- Enable the View on Web option if you want the product category to be viewed, but not sold, on the Web.
- Enable the Sell on Web option if you want the product category to be viewed and sold on the Web.

6. Enter the Product Info Hyperlink.
7. Enable the Enable Info URL option.
8. Enter the Product Image Hyperlink.
9. Enable the Enable Image URL option.
10. Click Save.

Tax codes setup

You must define the appropriate tax codes before you can enter orders with applicable sales taxes. The Tax Codes window is used for defining tax codes and is the same window that is accessed through the AR/Cash module.

Set up tax codes window



Admin Console: Configure > Commerce > Set up tables > Set up tax codes

Desktop: Orders > Set up tables > Tax codes

Current Tax Codes

Lists defined tax codes.

Code

Enter a code for the tax.

When defining state or province tax codes, use the standard two-character postal abbreviation for the state or province. This allows the Tax Auth field on the Enter and edit orders window to default to the customer's state tax code.

Title

Enter a title for the tax code.

Rate

Enter the percentage rate assigned to the tax code. Make sure to enter the rate as a percentage and not as a decimal. For example, enter 6.0 and not .06 for a tax rate of 6%.

G/L Account

Enter the general ledger account number assigned to the tax code, or use the lookup icon to select a value.

If you leave the G/L Account field blank, iMIS records the value entered in the Sales Tax field on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts).

Related Tax

These two fields allow you to enter multiple tax codes. Enter the codes for any other taxes you want to relate to the tax defined in the Code field.

To define tax codes

1. From Set up tax codes window, click New.

2. Enter a Code for the tax.
3. Enter a Title for the tax code.
4. Enter the percentage Rate you are assigning to the tax code.
5. (optional) Enter the G/L Account number.
6. (optional) Enter any applicable Related Tax.
7. Click Save.

Freight setup

iMIS Orders has the ability to calculate an order's freight charges automatically. To calculate freight charges automatically, you must enable the Automatic Calculation of Freight Charge option on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges). You then must select the freight calculation method you want to use from the options on the Add-on Charges window:

- Freight by Weight
- Freight by Total Value Ordered
- Freight by Total Quantity Ordered

Freight by weight

When calculating freight charges by weight, an order's shipping method, shipping postal code, and weight are factors in calculating freight charges.

Before Orders will calculate an order's freight charges by weight automatically, you must perform the following actions:

- Define shipping methods
- Define shipping zones
- Define weight tables
- Enable the Automatic Calculation of Freight Charge option
- Enable the Freight by Weight option

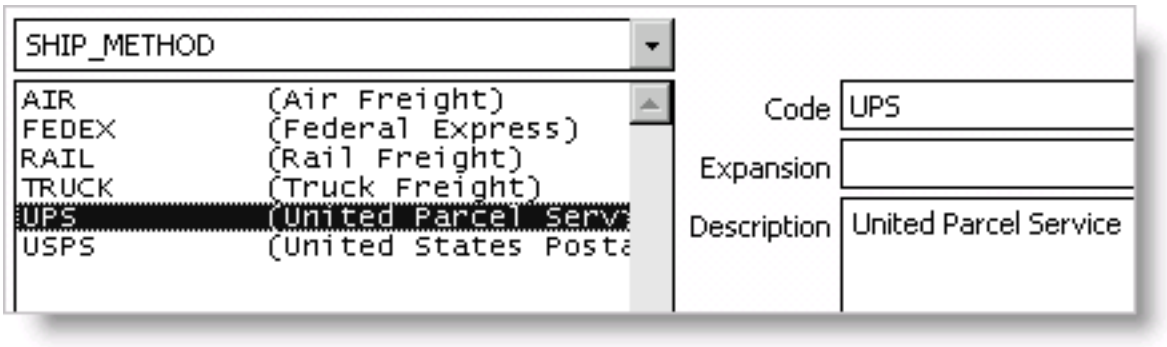
Note: The only shipping calculation supported in the iMIS Public View is Freight by Weight.

Defining shipping methods

You can define shipping methods for any form of transport or for any specific carrier that you use to ship your orders. Examples of shipping methods include Truck, Air, and Rail Freight as well as conventional carriers such as UPS, FEDEX, and USPS.

To define shipping methods, you first must create the SHIP_METHOD general look-up/validation table (from Customers, select Set up tables > General lookup/validation). After creating the SHIP_METHOD table, you can create shipping zone and freight tables.

See "About assigning default shipping methods during order entry" for more.



Example of the SHIP_METHOD general lookup/validation table

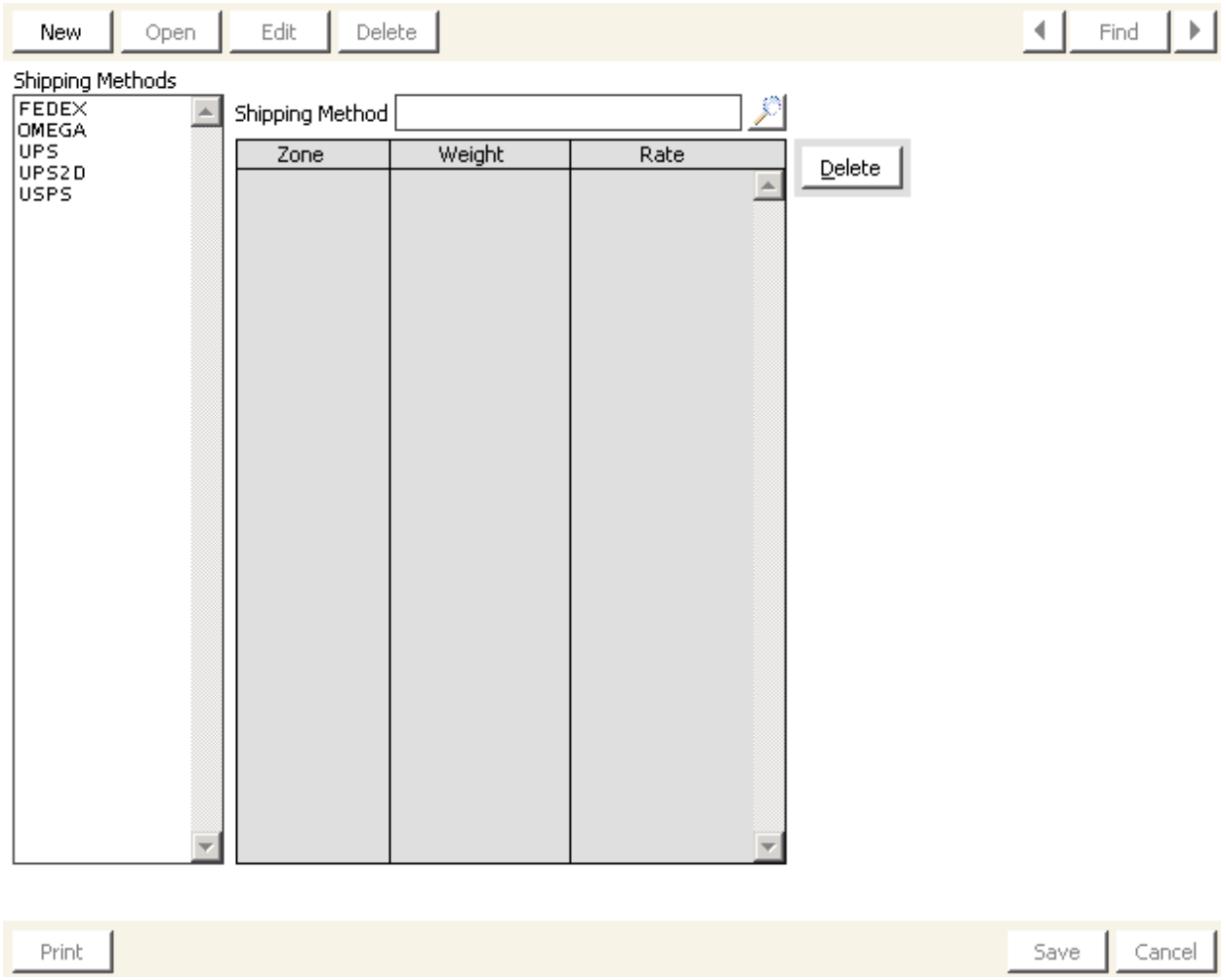
Defining weight tables

After defining your shipping zone tables, you can define weight tables on the Freight by Weight window for your user-defined shipping zones. Weight tables allow you to calculate shipping rates for individual shipping methods, and rates are calculated according to an order's shipping weight and shipping zone. When defining rates, high value determines the weight break for each rate.

After defining your weight tables, make sure you enable the Automatic Calculation of Freight Charge and Freight by Weight options on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges). When you enable these options, freight charges are automatically calculated by order weight when you enter an order.

Remember that you always can override automatic freight charges on the Order Details tab of the Enter and edit orders window if necessary. See "Entering order details information"for more.

Set up freight by weight window



Admin Console: Configure > Commerce > Set up tables > Set up freight by weight

Desktop: Orders > Setup tables > Freight by Weight

Shipping Methods

Displays the shipping methods for which you have defined weight tables.

Shipping Method

Enter the shipping method for which you are defining a weight table. Select the Find icon to look up a shipping method.

Shipping methods are defined on the SHIP_METHOD general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

Zone

Enter the designation for a shipping zone. The zone designation follows the postal code as defined in the Default Zone field and the Table list on the Set up zones window (from Orders, select Set up tables > Zones).

Weight

Enter the weight break for a shipping zone, which is the maximum weight.

For example, in the previous image of the Set up freight by weight window, any weight greater than 1.00 and less than or equal to 1.50 will be charged $2.50 for Zone 1. Any weight greater than 1.50 and less than or equal to 2.00 will be charged $2.75 for Zone 1.

Rate

Enter the freight rate for orders of the defined weight that are shipping to the specified zone.

To define weight tables

1. From Set up freight by weight window, click New to create a new weight table, or select an existing Shipping Method and click Edit to modify the table (or click Delete in the top row of buttons to remove the table).
2. Specify the weight table information.

- To create new rows in the table for zone-weight-rate sets, position your cursor in the Rate cell of the last row in the table and press Tab.
- To delete rows from the table, position your cursor in the Rate cell of the row to be deleted and click Delete at the right of the table.

Be sure to define at least one entry for every zone designator that is used in the various shipping zone tables that use this shipping method. (These designators are used in the Default Zone and Table fields of the Zones window.)

For example, assume you have defined a UPS zone table and a UPS-USA zone table, and you have used zone designators A, 1, 2, and 3 in those two UPS-based zone tables. In this example, you would define weight-rate sets for those four zone designators.

3. Click Save.

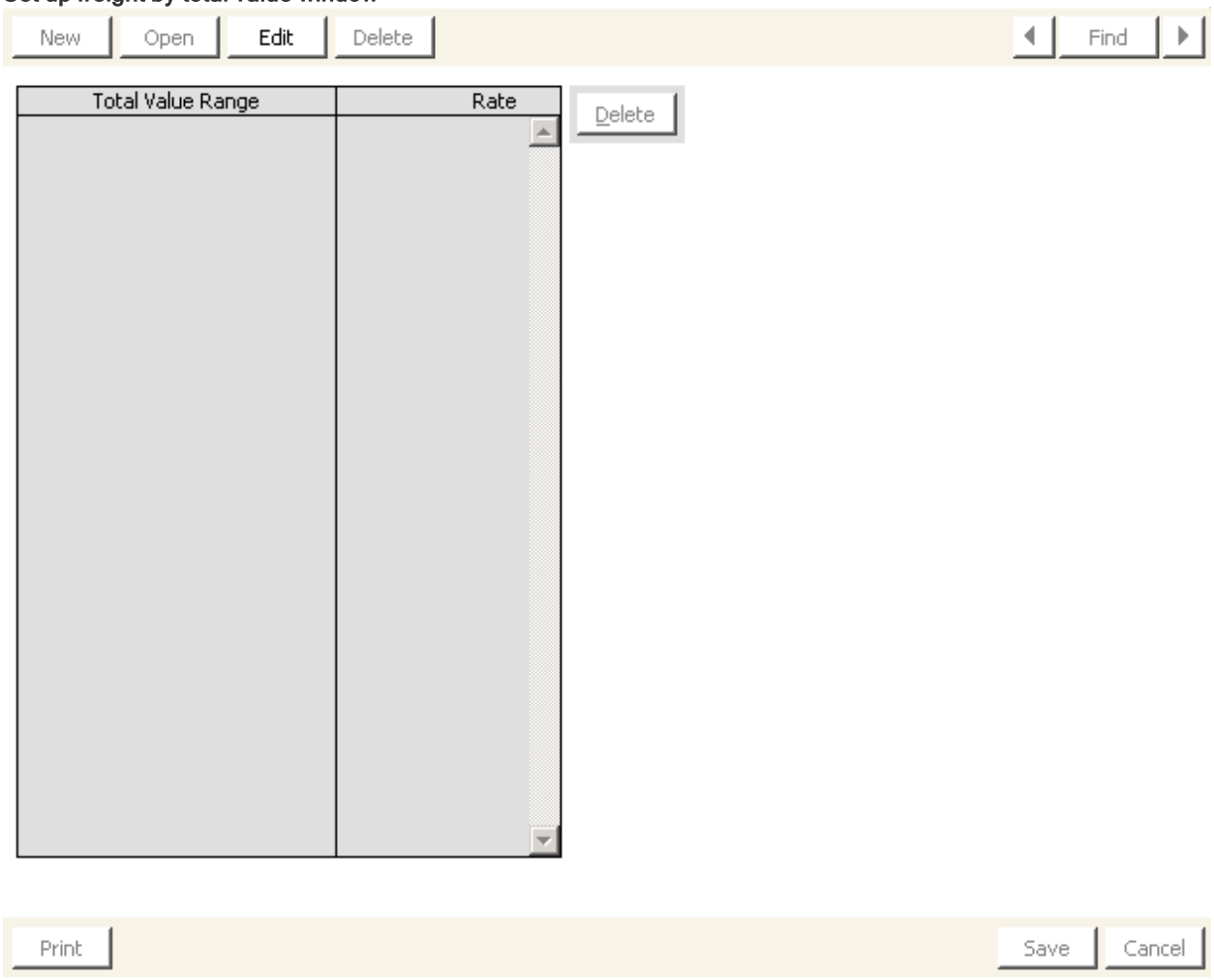
Freight by total value

When calculating freight charges by total value, iMIS uses an order's total pre-tax value excluding handling and restocking charges. To calculate freight charges by total order value, you must define freight rates for ranges of order values. Value ranges are defined on the Set up freight by total value window.

Before iMIS Orders automatically will calculate freight charges by total order value, you must perform the following actions:

- Set up value range tables
- Enable the Automatic Calculation of Freight Charge option
- Enable the Freight by Total Value Ordered option

Set up freight by total value window



Admin Console: Configure > Commerce > Set up tables > Set up freight by total value

Desktop: Orders > Set up tables > Freight by total value

Total Value Range

Enter the low value of a range. Each range's high value is determined by each succeeding range's low value; a range's high value equals the low value of the succeeding range minus .01.

Rate

Enter a freight rate for a value range.

Defining value ranges

Freight rates can be defined for any range of order values, and no limit exists to the number of value ranges and rates that can be defined. When defining a rate's value range, only the low value of the range is entered in the Total Value Range field. The high value of the range is not entered; it is calculated upon completing and saving the table.

When defining a value range's low value, the low value must be greater than $0.00, such as $0.01; $0.00 cannot be the beginning range. In addition, if your beginning range's lowest value is $5.00 for example, then freight will not be calculated for any orders valued less than $5.00.

Each range's high value is determined by each succeeding range's low value; a range's high value equals the low value of the succeeding range minus .01.

To define a single value range

1. Enter the low value in the Total Value Range field. (Low values must be greater than $0.00; $0.00 cannot be the beginning range.)
2. Enter the Rate for the order value range.
3. Enter the low value of the succeeding range in the Total Value Range field.

For example, say you need to define rates for the following three order value ranges:

- Orders with a value greater than $0.00 and less than $10.00 will cost $2.50 to ship.
- Orders valued between $10.00 and less than $25.00 will cost $5.00 to ship.
- Orders valued above $25.00 will cost $7.50 to ship.

To set up value ranges for required rates

1. Define the first value range:

- Enter 0.01 in the Total Value Range field for the first range's low value.
- Enter 2.50 for the Rate of the first range.
- Press Tab.

2. Define the second value range:

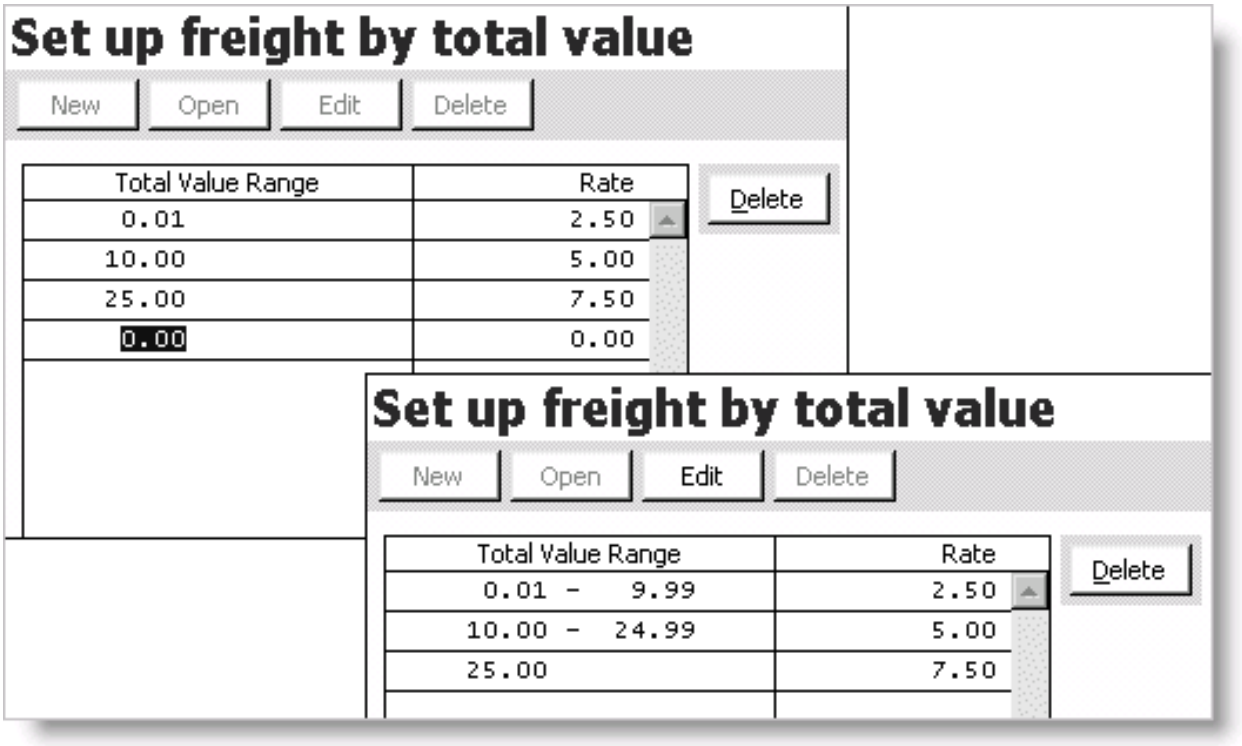
- Enter 10.00 in the Total Value Range field for the second range's low value. By entering 10 for the second range's low value, the first range's high value will equal 9.99 when the entire table is completed and saved.
- Enter 5.00 for the Rate of the second range.
- Press Tab.

3. Define the third value range:

- Enter 25.00 in the Total Value Range field for the third range's low value. By entering 25.00 for the third range's low value, the second range's high value will equal 24.99 when the entire table is completed and saved.
- Enter 7.50 for the Rate of the third range.

4. Click Save.

   The Total Value Range field will calculate and display the low and high values for each range.



Example of rates defined for three value ranges (before and after being saved)

To define a value range

1. From Set up freight by total value window, click Edit.
2. Enter the first range's low value in the Total Value Range field. (Low values must be greater than $0.00; $0.00 cannot be the beginning range.)
3. Enter a Rate for the first value range, and press Tab.
4. Enter a value in the Total Value Range field. The value entered determines the following:

- The high value of the preceding range.
- The low value of the current range you are defining.

5. (optional) Repeat this process for each additional value range you are defining.
6. Click Save.

To add a value range

When adding value ranges, you can add additional, expanded ranges as well as ranges that fall between other ranges.

1. From Set up freight by total value window, click Edit.
2. Place your cursor on the Rate of the last value range, and press Tab to display a new line (0.00).
3. Define the new range:

- Enter the new range's low value in the Total Value Range field.
- Enter a Rate for the new range.

4. Click Save. When you save the new range, it will be inserted in the table, and the high value will be calculated.

To edit or delete a value range

1. From Set up freight by total value window, click Edit.

2. Select the total value range you want to edit (you only can edit the low value of a range and the Rate). To delete a total value range:

- Select the row of the range you want to delete.
- Click the Delete button to the right of the table.

3. Click Save.

   The ranges are recalculated.

Calculating order values that fall outside defined ranges

If an order's pre-tax value exceeds the highest defined value range, the order's freight charges will be calculated at the rate defined for the highest value range. If an order's pre-tax value is below the lowest defined value range, no freight charges will be calculated, and no freight will be charged.

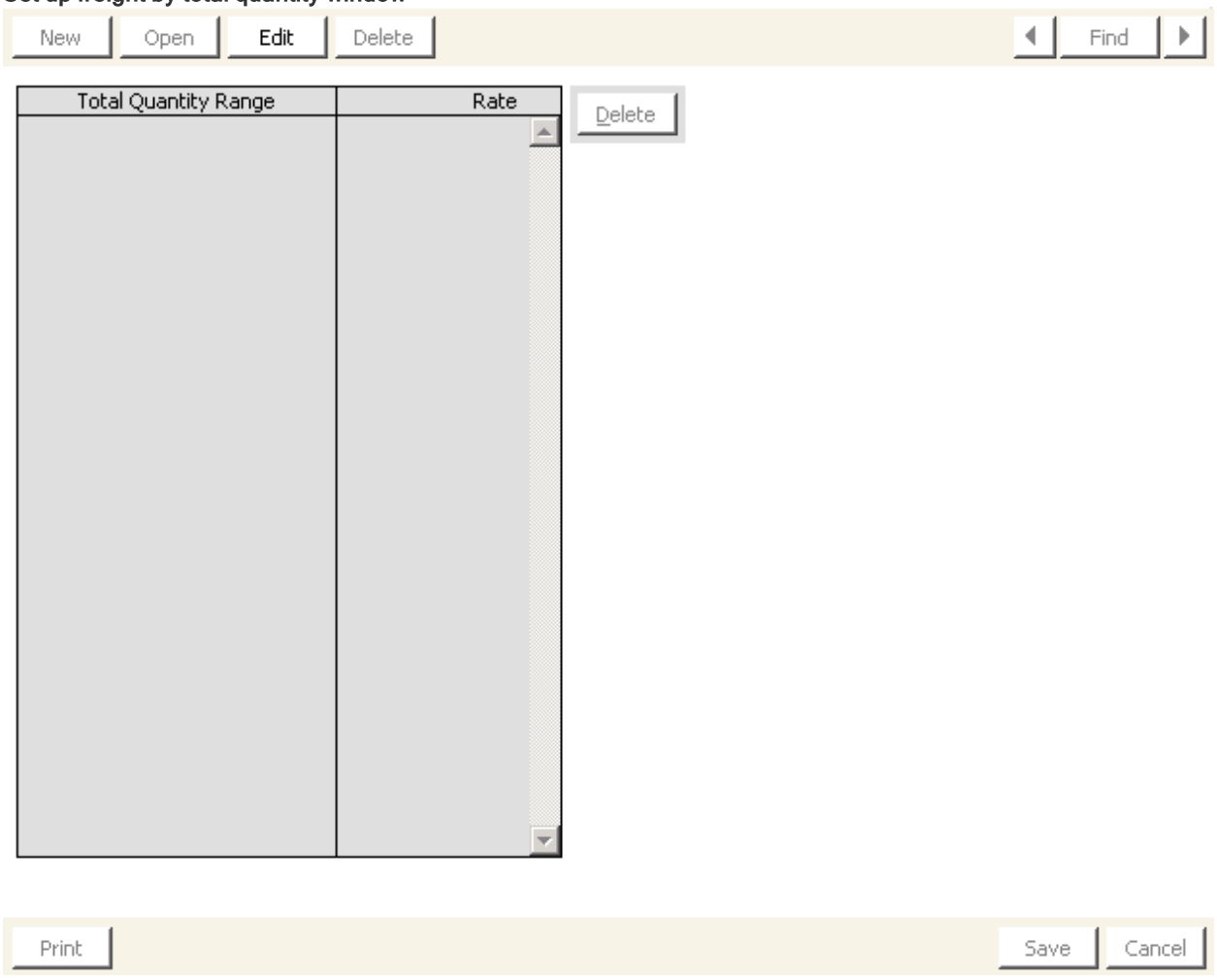
Freight by total quantity

When calculating freight charges by quantity, the total product quantity ordered determines an order's freight charges. To calculate freight rates by order quantity, you must define rates for ranges of product quantities. Quantity ranges are defined on the Set up freight by total quantity window.

Before iMIS Orders automatically calculates freight charges by order quantity, you must perform the following actions:

- Set up quantity range tables
- Enable the Automatic Calculation of Freight Charge option
- Enable the Freight by Total Quantity Ordered option

Set up freight by total quantity window



Admin Console: Configure > Commerce > Set up tables > Set up freight by total quantity

Desktop: Orders > Set up tables > Freight by total quantity

Total Quantity Range

Enter the minimum quantity of a range. Each range's maximum quantity is determined by each succeeding range's minimum quantity; a range's maximum quantity equals the minimum quantity of the succeeding range minus .01.

Rate

Enter a freight rate for a quantity range.

Defining quantity ranges

Freight rates can be defined for any range of product quantities, and no limit exists to the number of quantity ranges and rates that can be defined. When defining a rate's quantity range, only the minimum quantity of the range is entered in the Total Quantity Range field. The maximum quantity of the range is not entered; it is calculated upon completing and saving the table.

When defining a quantity range's minimum quantity, the minimum quantity must be greater than 0.00, such as 0.01; 0.00 cannot be the beginning range. In addition, if your beginning range's minimum quantity is 5.00 for example, then freight will not be calculated for any orders for quantities of less than 5.00.

Each range's maximum quantity is determined by each succeeding range's minimum quantity; a range's maximum quantity equals the minimum quantity of the succeeding range minus .01. Thus, defining a single value range is a three step process:

1. Enter the minimum quantity in the Total Quantity Range field. (Minimum quantities must be greater than 0.00; 0.00 cannot be the beginning range.)
2. Enter the Rate for the product quantity range.
3. Enter the minimum quantity of the succeeding range in the Total Quantity Range field.

For example, say you need to define rates for the following three product quantity ranges:

- Orders for quantities of more than 0 and less than 5 products will cost $7.50 to ship.
- Orders for quantities of between 5 and less than 10 products will cost $10.00 to ship.
- Orders for quantities of 10 or more products will cost $20.00 to ship.

To set up value ranges for the required rates, you would do the following:

1. Define the first quantity range:

- Enter 0.01 in the Total Quantity Range field for the first range's minimum quantity.
- Enter 7.50 for the Rate of the first range.
- Press Tab.

2. Define the second quantity range:

- Enter 5.00 in the Total Quantity Range field for the second range's minimum quantity. By entering 5.00 for the second range's minimum quantity, the first range's maximum quantity will equal 4.99 when the entire table is completed and saved.
- Enter 10.00 for the Rate of the second range.
- Press Tab.

3. Define the third quantity range:

- Enter 10.00 in the Total Quantity Range field for the third range's minimum quantity. By entering 10.00 for the third range's minimum quantity, the second range's maximum quantity will equal 9.99 when the entire table is completed and saved.
- Enter 20.00 for the Rate of the third range.

4. Click Save.

   The Total Quantity Range field will populate with the maximum quantity for each range.

Example of rates defined for three quantity ranges (before and after being saved)

To define a quantity range

1. From Set up freight by total quantity window, click Edit.
2. Enter the first range's minimum quantity in the Total Quantity Range field. (Minimum quantities must be greater than 0.00; 0.00 cannot be the beginning range.)
3. Enter a Rate for the first quantity range, and press Tab.
4. Enter a quantity in the Total Quantity Range field. The quantity entered determines the following:

- The maximum quantity of the preceding range.
- The minimum quantity of the current range you are defining.

5. (optional) Repeat this process for each additional quantity range you are defining.
6. Click Save.

To add a quantity range

When adding quantity ranges, you can add additional, expanded ranges as well as ranges that fall between other ranges.

1. From Set up freight by total quantity window, click Edit.
2. Place your cursor on the Rate of the last quantity range, and press Tab to display a new line (0.00).
3. Define the new range:

- Enter the new range's low value in the Total Quantity Range field.
- Enter a Rate for the new range.

4. Click Save.

The new range is inserted in the table, and the high value is calculated.

To edit or delete a quantity range

1. From Set up freight by total quantity window, click Edit.
2. Select the total quantity range you want to edit (you only can edit the low value of a range and the Rate). To delete a total quantity range:

- Select the row of the range you want to delete.
- Click the Delete button to the right of the table.

3. Click Save.

   The ranges are recalculated.

Calculating freight charges that fall outside defined ranges

If an order's product quantity exceeds the maximum defined quantity, the order's freight charges will be calculated at the rate defined for the maximum quantity. If an order's product quantity is less than the minimum defined quantity, no freight charges will be calculated, and no freight will be charged.

Zones setup

After creating the SHIP_METHOD general lookup/validation table and defining your shipping methods, you can set up your shipping zone tables. Zone tables are based upon shipping method, country (if applicable), and zip or postal codes. You can set up zone tables both for multiple shipping methods and for countries that use these shipping methods.

To define a default zone table for a shipping method, do not designate a country for a shipping method when setting up shipping zones. Orders that do not list a country will use the default zone table for a given shipping method.

Shipping zones are defined according to postal code. Depending on your organization's needs, you can define single postal codes as shipping zones or divide groups of postal codes into shipping zones.

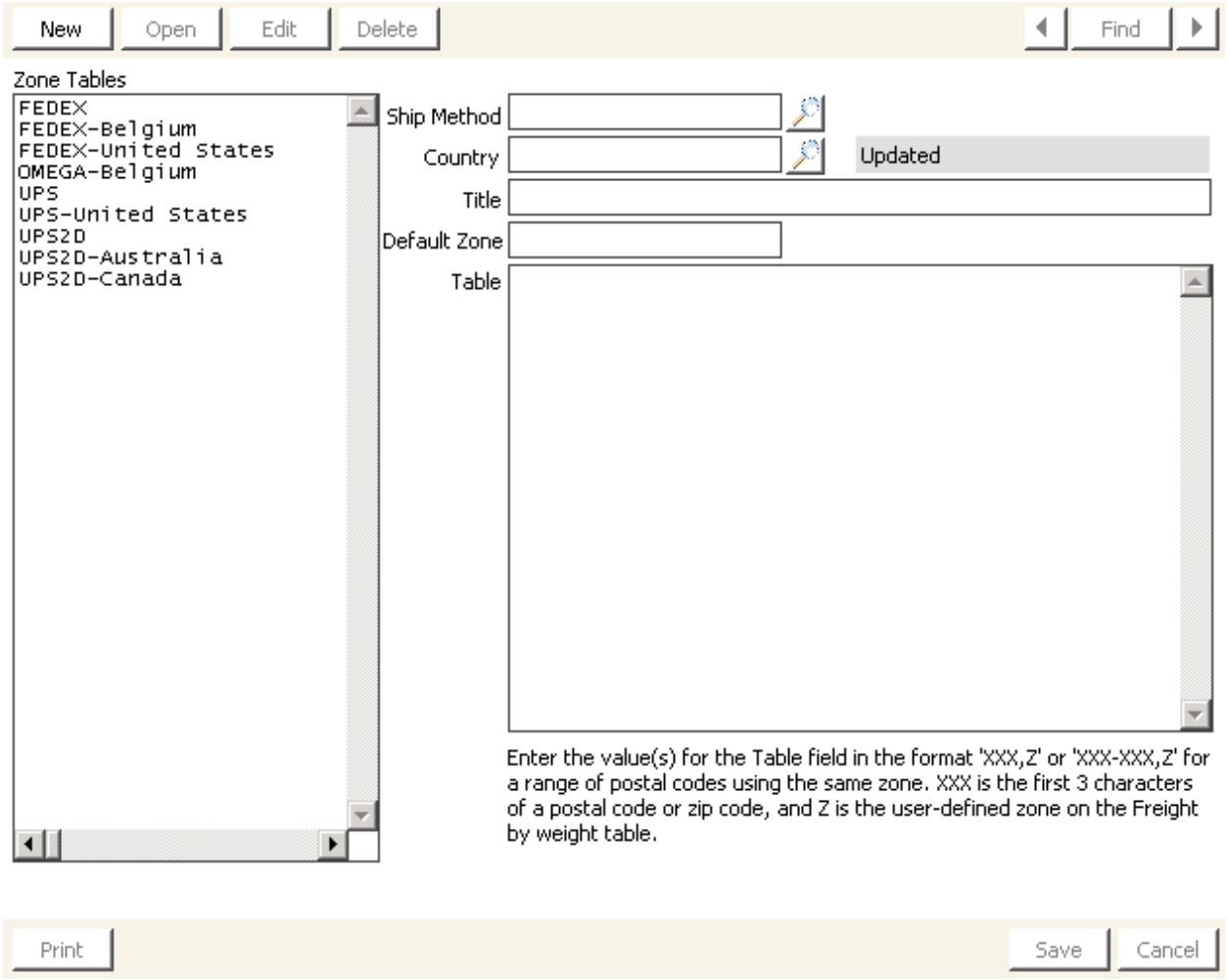
Shipping zones use the first three characters of a postal code, and the table format for defining zones is XXX,Z where XXX represents the first three characters of a postal code, and Z represents the zone designation defined by the user. You also can enter a postal

code in the format XXX-XXX,Z where XXX represents the first three characters of the beginning postal code, XXX represents the first three characters of the ending postal code, and Z represents the zone designation. These zone designations are used when setting up weight tables on the Freight by Weight window.

For example, if you define a shipping zone for a single postal code, such as 75208, you would enter 752 followed by a comma. You then would enter either a numeric or alphabetic value for the zone designation, such as a 1. The shipping zone would display as 752,1. A shipping zone defined for a group of postal codes could be entered as 900-999,2.

As long as you follow the correct table format, you can define as many zone codes as necessary. You must define shipping zone tables before defining freight tables. Zone tables are defined on the Zones window.

Set up shipping zones window



Admin Console: Configure > Commerce > Set up tables > Set up shipping zones

Desktop: Orders > Set up tables > Zones

Zone Tables

Lists the defined shipping zone tables. Zone table names are concatenations of the Ship Method and Country fields.

Ship Method

Specifies the shipping method for the selected zone table. Select the Find icon to look up a shipping method; shipping methods are defined on the SHIP_METHOD general look-up/validation table (from Customers, select Set up tables > General lookup/validation).

Country

(optional) Specifies the country for the selected zone table. Select the Find icon to look up a country; countries are defined on the Set up country names window (from Customers, select Set up tables > Country names).

If you are updating an existing zone table and the Country field is not populated, you can enter a country for the zone table. However, once the Country field is populated and saved, it no longer can be edited.

To define a default zone table for a shipping method, leave the Country field blank. Default zone tables are used for orders that do not list a country.

Updated

(read only) Displays the last date and time that the selected zone table was modified.

Title

Specifies a descriptive title for the selected zone table.

Default Zone

(optional) Specifies the default shipping zone designation for the selected zone table, which must have a matching value in the Zone field of the Freight by Weight window.

This default zone is used only when an order's 'Ship to' address specifies a country for which a zone table exists and when any of the following conditions exists:

- The 'Ship to' address:
- Does not specify a postal code, or
- Specifies a postal code that does not match any of the entries in the Table list for the zone table.
- The 'Ship to' address of an order specifies a postal code, but the Table list for the zone table does not contain any entries.

For example, if a UPS zone table and a UPS-USA zone table both exist, the UPS zone table is used if an order does not specify a country name in the 'Ship to' address.

However, if USA is specified in the order's 'Ship to' address, the UPS-USA zone table is used instead. If the 'Ship to' address in this second case does not specify a postal code, or it specifies a postal code that isn't listed in the UPS-USA zone table, then the specified Default Zone designation would be used to determine the appropriate freight charges by looking for a matching value from Zone field of the Freight by Weight window.

Table

Specifies the shipping zones for the table. The table format for defining zones is XXX,Z or XXX-XXX,Z where XXX is the first three characters of a postal code, and Z is a shipping zone designation specified in the Zone field of the Freight by Weight table.

Table format

(read only) Displays the correct format for defining shipping zones in the Table list.

To define shipping zone tables

1. From Set up shipping zones window, click New to create a new zone table, or select an existing Zone Table and click Edit to modify the table (or click Delete to remove the table).
2. Specify the shipping zone information.
3. Click Save.

Verifying shipping zones for orders

When entering orders, the following rules determine which zone table is used:

- A country is defined for the Ship to address - The zone table used is the one for which the Ship Method and Country combination matches an order's Ship to address Country and Shipping Method.
- A country is not defined for the Ship to address - The zone table used is the one for which the Ship Method matches an order's Shipping Method. The zone table has a blank Country field.

After the correct zone table has been determined, the following rules determine whether the Default Zone defined in that zone table is used:

- The Ship to address:
- Does not specify a postal code, or
- Specifies a postal code that does not match any of the entries in the Table list for the zone table.
- The Ship to address of an order specifies a postal code, but the Table list for the zone table does not contain any entries.

Overview or Orders set up tasks

Set up Orders tables first and then set up:

- Order types
- Product categories
- Tax codes
- Freight information

Set up tables sub-task list (Orders)

Orders has its own tables that must be set up first. You access these tables through the Set up tables sub-task list (from Orders, select Set up tables).

Order types

Select to open the Set up order types window used for defining order types. All orders are classified according to one of the defined order types, and the order types must be defined before you can enter and process orders.

Product categories

Select to open the Set up product categories window used for defining product categories. All products that you define are classified according to one of the defined product categories, and you must define the product categories before you can define your products.

Tax codes

Select to open the Set up tax codes window used for defining tax codes. You must define the appropriate tax codes in order to apply sales taxes to product orders.

Freight by weight

Select to open the Set up freight by weight window used for defining zones for shipping methods based on weight.

Freight by total value

Select to open the Set up freight by total value window used for defining value tables. Value tables allow you to calculate order shipping rates based on total order value ranges.

Freight by total quantity

Select to open the Set up freight by total quantity window used for defining quantity tables. Quantity tables allow you to calculate order shipping rates based on product quantity ordered.

Zones

Select to open the Set up zones window used for defining shipping zone tables. You must define zone tables for each of your shipping methods when calculating shipping charges by order weight; zone tables can be set up both for multiple shipping methods and for countries that use these shipping methods.

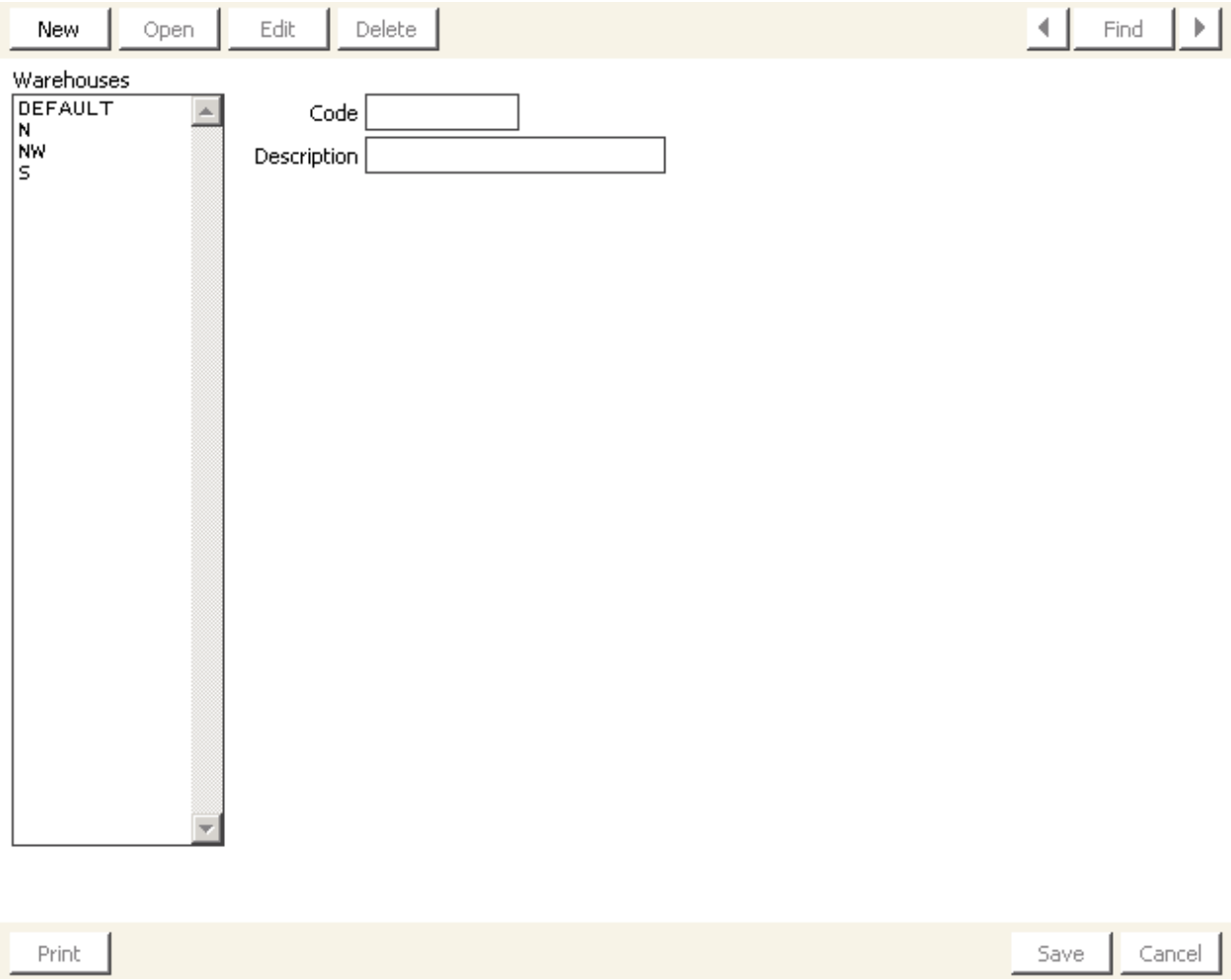
Orders: Set up warehouses

To define inventory parameters for multiple warehouses on the Warehouses window, the warehouses first must be defined on the Set up warehouses window (from Orders, select Set up warehouses). If the warehouses are not defined on the Set up warehouses window, you will not be able to define inventory parameters for them.

The Set up warehouses window is accessed from the Set up warehouses task-list item. The Set up warehouses item displays under the Orders task list only if the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders,

select Set up module, and click Inventory). Warehouse locations and descriptions defined on the Set up warehouses window are stored in the Product_Location table.

Set up warehouses window



Admin Console: Configure > Commerce > Set up warehouses

Desktop: Orders > Set up warehouses

Delete button

Click to delete a selected warehouse. Warehouses that are still used by the Manage products window cannot be deleted. See To delete a warehouse for more.

Warehouses

Lists all defined warehouse codes.

Code

(required) Enter a warehouse code or location. The Code field is disabled during Edit mode.

Description

Enter a warehouse description.

To define a warehouse

1. From Set up warehouses window, click New.
2. Enter a warehouse Code.
3. Enter a Description for the warehouse.
4. Click Save.

To edit a warehouse description

1. From Set up warehouses window, select a warehouse code from the list of Warehouses.
2. Click Edit.
3. Edit the warehouse's Description.
4. Click Save.

To delete a warehouse

You can delete a warehouse from the Set up warehouses window only if the following conditions are true:

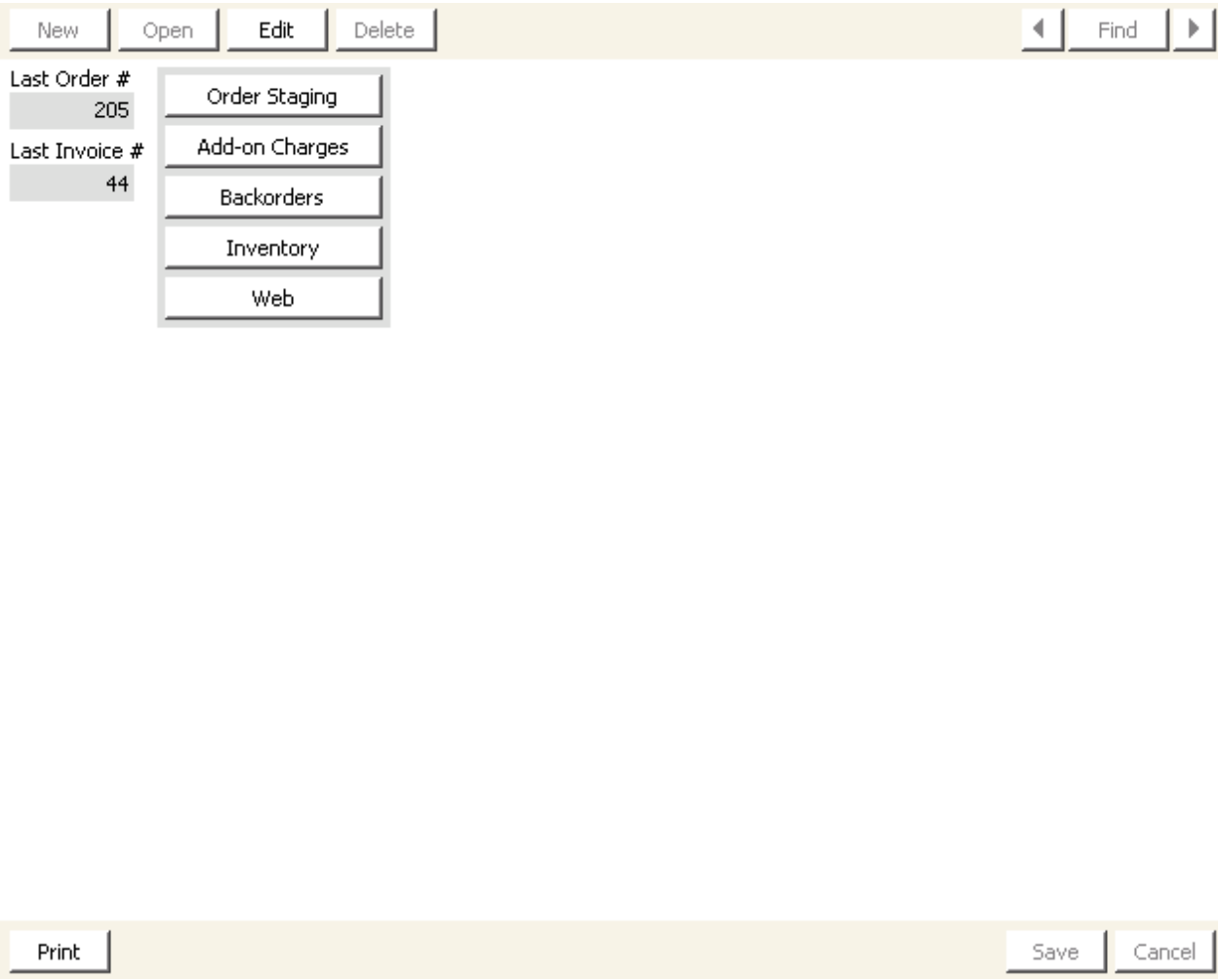
- The warehouse is not the Default warehouse for any product.
- No orders are open for products stored in the warehouse.
- The warehouse is empty of all inventory.

1. From Set up warehouses window, select the warehouse you want to delete from the list of Warehouses.
2. Click Delete.

Orders: Set up module

The iMIS Orders feature has its own system setup used for setting the defaults and parameters needed for managing and processing order transactions and product inventory. You set up your Orders module through the Configure commerce options window.

Configure commerce options window



Admin Console: Configure > Commerce > Configure commerce options

Desktop: Orders > Set up module

Last Order #

(read only) Displays the order number of the last order entered.

Last Invoice #

(read only) Displays the invoice number of the last order invoiced.

Order Staging button

Opens the Order Status Defaults window used for defining the defaults for the system-defined order type categories.

Add-on Charges button

Opens the Add-on Charges window used for enabling sales tax for freight and handling charges, for selecting a default shipping method, and for defining freight, handling, and restocking charges.

Backorders button

Opens the Backorder Processing window used for enabling and defining Automatic Back-order Processing.

Inventory button

Opens the Inventory System Setup window used for defining default inventory options and default accounts.

Web button

Opens the Web Order Options window used for defining options for sales transactions over the Web.

Defining order status defaults

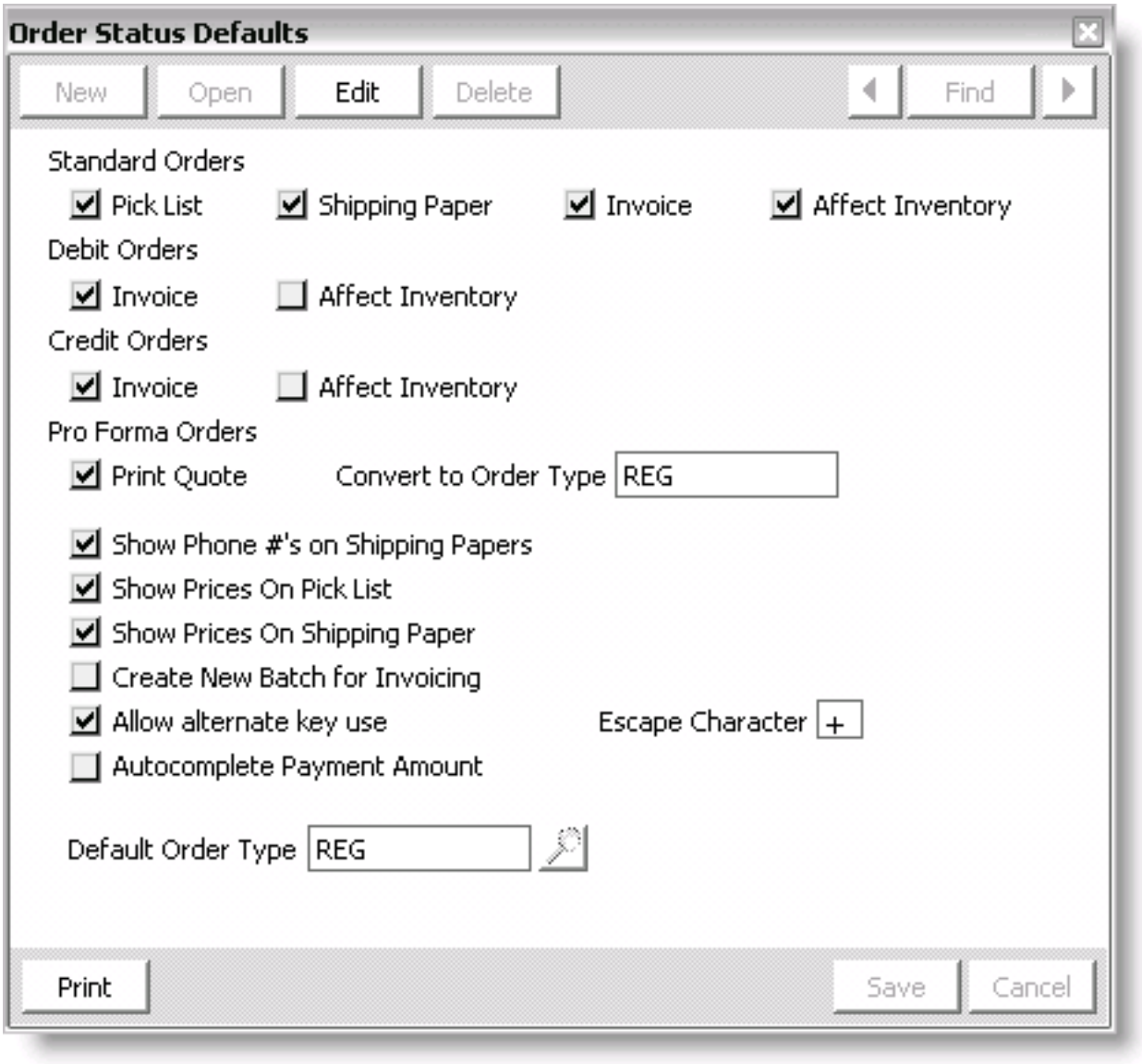
iMIS Orders has four system-defined order type categories: Standard Orders, Debit Orders, Credit Orders, and Pro Forma Orders. Each order type that you define on the Set up order types window (from Orders, select Set up tables > Order types) falls into one of these four order type categories.

The Order Status Defaults window allows you to define the default order processing and inventory options for each order type category as well as several order processing stage options. When you define a new order type on the Set up order types window, the order

processing and inventory options enable automatically according to the defaults set on the Order Status Defaults window.

Regardless of the default options enabled on the Order Status Defaults window, you always can override order processing and inventory options on the Set up order types window for any order type.

Order Status Defaults window



From Orders, select Set up module, and click Order Staging

Standard Orders

The Standard Orders options that you enable are the default options that enable on the Set up order types window (from Orders, select Set up tables > Order types) when you define a standard order type:

- Pick List - Enable to process standard orders through the Print pick list processing stage. If you enable this option, a Pick List sorted by product code prints for each standard order. Pick Lists show the total number of products needed for each order and are useful if you have an intermediate staging area where products are gathered for filling orders.
- Shipping Paper - Enable to process standard orders through the Print shipping paper order processing stage. If you enable this option, shipping papers (Packing Slips) print for each order.
- Invoice - Enable to process standard orders through the Invoice orders order processing stage. If you enable this option, an invoice prints for each order.
- Affect Inventory - Enable to reduce product inventory automatically when you invoice an order.

Debit Orders

A debit order is a special order type category used for entering adjustments for invoiced orders, such as increasing the number of products purchased. Debit orders are entered against an original order's invoice; however, they do not update the original, invoiced order. Any order type created as a debit order can generate an invoice and affect inventory levels only.

The Debit Orders options that you enable are the default options that enable on the Set up order types window (from Orders, select Set up tables > Order types) when you define a debit order type:

- Invoice - Enable to process debit orders through the Invoice orders order processing stage. If you enable this option, an invoice prints for each debit order.
- Affect Inventory - Enable to reduce product inventory automatically when you invoice a debit order.

Credit Orders

A credit order is a special order type category used for reversing invoiced orders. Since invoiced orders cannot be canceled, credit orders are used to reverse invoiced orders. Credit orders are entered against an original order's invoice; however, they do not update the original, invoiced order.

The Credit Orders options that you enable are the default options that enable on the Set up order types window (from Orders, select Set up tables > Order Types) when you define a credit order type:

- Invoice - Enable to process credit orders through the Invoice orders order processing stage. If you enable this option, an invoice prints for each credit order.
- Affect Inventory - Enable to increase product inventory automatically when you enter a credit order.

Pro Forma Orders

A pro forma order is a price quote that you can convert to a standard order. The Pro Forma Orders options that you enable are the default options that enable on the Set up order types window (from Orders, select Set up tables > Order Types) when you define a debit order type:

- Print Quote - Enable to process pro forma orders through the Print quotes order processing stage. If you enable this option, a quote prints for each pro forma order.
- Convert to Order Type - Enter the default order type for converted pro forma orders. The order type you enter is the default order type for pro forma orders when they are converted.

Show Phone #'s on Shipping Papers

Enable to print customer phone numbers on shipping papers (packing slips) below the 'Ship to' Address. This is a requirement for some international businesses.

Show Prices On Pick List

Enable to print extended price amounts on pick lists.

Show Prices On Shipping Paper

Enable to print extended price amounts on shipping papers.

Create New Batch for Invoicing

Enable to create a new batch each time you generate invoices (recommended). If you do not enable this option, the transactions created when you invoice orders are included in the original batch in which payment was entered.

> **Note:** Note: There is one exception to the standard behavior when this option is not enabled. If the invoicing run includes items whose original order batch has a status of Ready or Posted (closed), a new batch is created automatically and iMIS displays a message informing you that a new batch was created for transactions whose original batch is no longer available.

When processing invoices individually using the Print button, the transactions created when you invoice orders are subject to the following rules:

- If Create New Batch for Invoicing is enabled, the following rules apply:
- If you have an open batch selected in your current session, invoices will be generated into that open batch.
- If you have no open batch selected in your current session, the system will prompt you to select or create an open batch into which the invoice entry will be generated.
- If Create New Batch for Invoicing is not enabled, the following rules apply:
- If the original batch in which the order was generated is open, the invoice entry will be generated into that same batch.
- If the original batch in which the order was created is closed, but another batch is selected and open in your current session, the invoice entry will be created into that batch.
- If the original batch is closed, and there is no batch selected and open in your current session, the system will prompt you to select or create an open batch into which the invoice entry will be generated.

Caution! Enable the Create New Batch for Invoicing option if you are using the iMIS Orders backorder feature. For example, with the Create New Batch for Invoicing option enabled, an order that is invoiced in April that has a backorder that is filled in June will be in the June batch. Without the Create New Batch for Invoicing option enabled, the invoice for the backorder will be in the original April batch. The invoice will reflect the current date, but the AR statement will reflect the old batch date, which is incorrect for aging.

Allow alternate key use

Enable to use identifying numbers for customers other than customer IDs. For example, you may want to use a Social Security number, which is derived from the Major Key field. If you enable this option, the Escape Character field displays.

Escape Character

(Displays when the Allow alternate key use option is enabled) Enter an appropriate character, such as a forward slash, to differentiate the entry of the major key. Prefix the major key in the BT_ID field with this character (forward slash, as an example).

Autocomplete Payment Amount

Enable to automatically populate the Payment Amount field with the order amount after the order is invoiced if you enter credit card information on the Payments tab on the Enter and edit orders window but do not enter a payment amount (or if the payment amount is zero).

If this option is disabled and the Payment Amount field on the Payments tab on the Enter and edit orders window is blank or the payment amount is zero, a message displays to confirm that the Payment Amount field is blank. If you select Yes, the credit card information is saved and the credit card is not charged when the order is invoiced. If you select No, all of the information in the credit card fields is deleted.

This option is disabled by default.

Default Order Type

Enter the default order type that populates the Order Type field on the Overview tab of the Enter and edit orders window each time you enter a new order. The default order type is in effect each time you open iMIS. If you enter an order with a different order type, the Order Type field on the Overview tab defaults to the last order type entered until you restart iMIS.

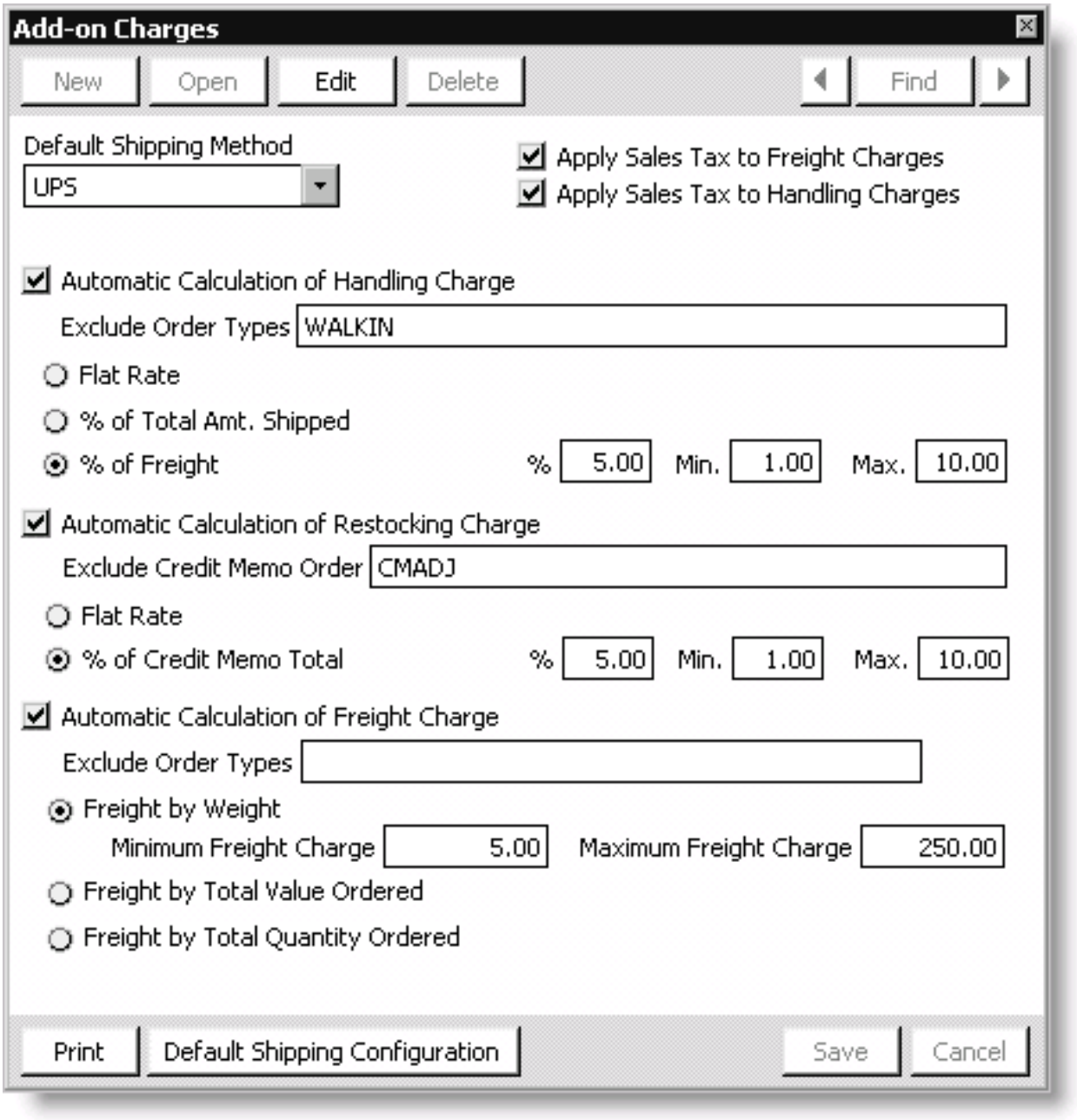
To define order status defaults

1. From Orders, select Set up module to open the Set up module window.
2. Click Order Staging to open the Order Status Defaults window.
3. Click Edit.
4. Enable the default options for each order type category.
5. Enter the order type to which you want pro forma orders to convert in the Convert to Order Type field.
6. Enable any other default order status options.
7. (optional) Enter the Default Order Type.
8. Click Save.

Defining add-on charges

iMIS Orders allows you to define a default shipping method for your orders. You also can calculate freight, handling, and restocking charges, as well as apply sales tax to the calculated freight and handling charges. All of the default charges can be overridden at order entry.

Add-on Charges window



From Orders, select Set up module, and click Add-on Charges

Default Shipping Method

Enter the default shipping method you want to use when shipping your orders. The value entered displays in the Shipping Method field on the Overview tab of the Enter and edit orders window. Select the Find icon to look up a shipping method.

Shipping methods are defined on the SHIP_METHOD general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

Apply Sales Tax to Freight Charges

Apply Sales Tax to Handling Charges

Enable if you want iMIS automatically to apply sales taxes to freight and/or handling charges for taxable products.

> **Note:** VAT only: Even if you configure iMIS to do VAT-exclusive pricing, the cart on your website will show your shoppers VAT-inclusive product prices and shipping/handling fees, to comply with sales tax rules. See "Configuring VAT options in AR/Cash" in International Taxation.

Automatic Calculation of Handling Charge

Enable if you want iMIS to calculate handling charges automatically. Handling charges can be overridden on the Order Details tab at order entry.

The following fields display when you enable the Automatic Calculation of Handling Charge option:

Exclude Order Types - Enter the order types that you want to exclude from automatic handling charges. For example, you may want to exclude on-site or walk-in customer orders from any handling charges. Separate multiple order types by commas.

Flat Rate - Enable to define a single, flat handling charge for orders. When you enable this option, the following fields display for defining your flat handling charge:

- Rate - Enter the default, fixed dollar amount of the handling charge.
- Minimum Order - Enter the minimum dollar amount for which handling charges will apply. For example, no handling charges will apply to orders under $20.00 if you enter 20.00 for the Minimum Order. Entering a zero means that no orders are excluded from handling charges.

% of Total Amt Shipped - Enable to calculate handling charges as a percentage of an order's total cost. When you enable this option, the following fields display for calculating your handling charge:

- % - Enter a percentage to calculate handling charges. For example, if you enter 5.00, an order that costs $100.00 would have handling charges of $5.00.
- Min - Enter a minimum dollar amount for handling charges. For example, entering 1.00 would charge a minimum handling charge of $1.00 regardless of the percentage defined in the % field. Entering a zero means no minimum exists for handling charges.
- Max - Enter a maximum dollar amount for handling charges. For example, entering 100 would charge a maximum handling charge of $100.00 regardless of the percentage defined in the % field. Entering a zero means no maximum exists for handling charges.

% of Freight - Enable to calculate handling charges as a percentage of freight costs. When you enable this option, the following fields display for calculating your handling charge:

- % - Enter a percentage to calculate handling charges. For example, if you enter 5.00, an order with freight costs of $100.00 would have handling charges of $5.00.
- Min - Enter a minimum dollar amount for handling charges. For example, entering 1.00 would charge a minimum handling charge of $1.00 regardless of the percentage defined in the % field. Entering a zero means no minimum exists for handling charges.
- Max - Enter a maximum dollar amount for handling charges. For example, entering 100 would charge a maximum handling charge of $100.00 regardless of the percentage defined in the % field. Entering a zero means no maximum exists for handling charges.

Automatic Calculation of Restocking Charge

Enable if you want iMIS to calculate restocking charges automatically for credit memo orders. The following fields display when you enable the Automatic Calculation of Restocking Charge option:

Exclude Credit Memo Order - Enter the credit memo order types you want to exclude from automatic restocking charges. Separate multiple credit memo order types by commas.

Flat Rate - Enable to define a single, flat restocking charge for credit memo orders. When you enable this option, the following fields display for defining your flat restocking charge:

- Rate - Enter the default, fixed dollar amount of the restocking charge.
- Min Credit Memo Amount - Enter the minimum dollar amount for which restocking charges will apply. For example, no restocking charges will apply to credit memo orders under $20.00 if you enter 20.00 for the Minimum Order. Entering a zero means no credit memo orders are excluded from restocking charges.

% of Credit Memo Total - Enable to calculate restocking charges as a percentage of a total credit memo order. When you enable this option, the following fields display for calculating your restocking charge:

- % - Enter a percentage to calculate restocking charges. For example, if you enter 5.00, a credit memo order for $100.00 would have restocking charges of $5.00.
- Min - Enter a minimum dollar amount for restocking charges. For example, entering 1.00 would charge a minimum restocking charge of $1.00 regardless of the percentage defined in the % field. Entering a zero means no minimum exists for restocking charges.
- Max - Enter a maximum dollar amount for restocking charges. For example, entering 100 would charge a maximum restocking charge of $100.00 regardless of the percentage defined in the % field. Entering a zero means no maximum exists for restocking charges.

Automatic Calculation of Freight Charge

Enable if you want iMIS to calculate freight charges automatically. When you enable the Automatic Calculation of Freight Charge option, freight charges are calculated automatically based on which of the following calculation methods is enabled. Regardless of which calculation method is used, freight charges can be overridden on the Order Details tab of the Enter and edit orders window.

Exclude Order Types - (Displays only when the Automatic Calculation of Freight Charge option is enabled) Enter the order types that you want to exclude from automatic freight charges. Separate multiple order types by commas.

Freight by Weight - Enable to calculate freight charges based on order weight. When you enable the Freight by Weight option, freight charges are calculated based on the weight tables defined on the Set up freight by weight window (from Orders, select Set up tables > Freight by weight).

The following fields display when the Freight by Weight option is enabled:

- Minimum Freight Charge - Enter a minimum dollar amount for freight charges. For example, entering 5.00 would charge a minimum freight charge of $5.00 regardless of an order's shipping weight or destination. Entering a zero means no minimum exists for freight charges.
- Maximum Freight Charge - Enter a maximum dollar amount for freight charges. For example, entering 250.00 would charge a maximum freight charge of $250.00 regardless of an order's shipping weight or destination. Entering a zero means no limit exists for freight charges.

Freight by Total Value Ordered - Enable to calculate freight charges based on total pre-tax order value, excluding handling and restocking charges. When you enable the Freight by Total Value Ordered option, freight charges are calculated based on the value ranges defined on the Set up freight by total value window (from Orders, select Set up tables > Freight by total value).

Freight by Total Quantity Ordered - Enable to calculate freight charges based on total product quantity ordered. When you enable the Freight by Total Quantity Ordered option, freight charges are calculated based on the quantity ranges defined on the Set up freight by total quantity window (from Orders, select Set up tables > Freight by total quantity).

Default Shipping Configuration button

Click to open the Default Shipping Configuration window used for defining default shipping methods for individual countries. See Defining Default Shipping Methods for Individual Countries for details.

To define add-on charges

1. From Orders, select Set up module to open the Set up module window.
2. Click Add-on Charges to open the Add-on Charges window.
3. Click Edit.
4. Enter the Default Shipping Method for your orders.
5. (optional) Enable the options to add sales tax to freight and handling charges.
6. (optional) Enable the default options for handling charges.
7. (optional) Enable the default options for restocking charges.
8. (optional) Enable the default options for freight charges.
9. Click Save.

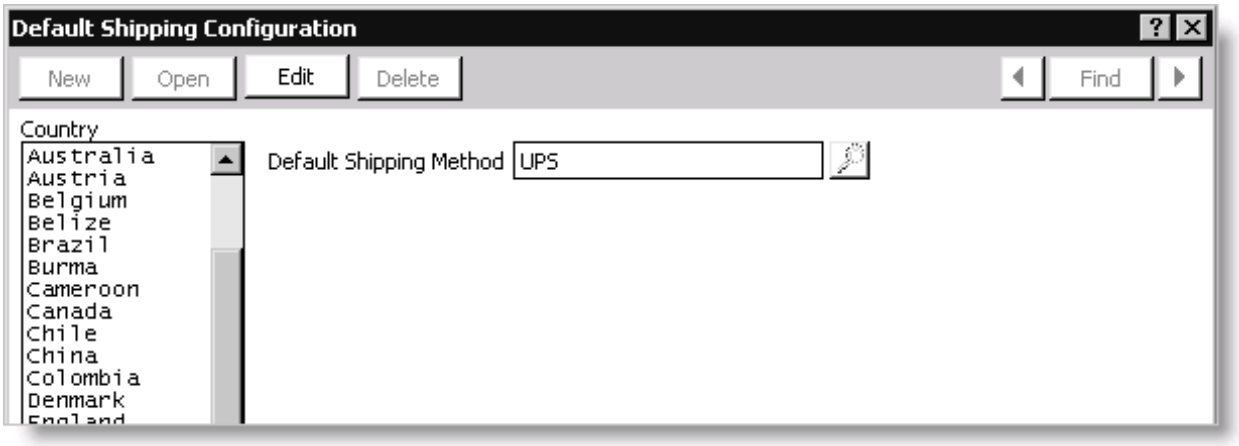
Defining default shipping methods for individual countries

Default shipping methods are defined for individual countries on the Default Shipping Configuration window, which is accessed by clicking Default Shipping Configuration on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

A different default shipping method can be assigned to each individual country defined on the Set up country names window. This is a useful feature for organizations frequently shipping to international customers. The ability to assign a default shipping method to individual countries streamlines and automates the order-entry process.

You always have the ability to override an order's Shipping Method during order entry. See "About assigning default shipping methods during order entry" for more.

Default Shipping Configuration window



From Orders, select Set up module, click Add-on Charges, and click Default Shipping Configuration

Country

Displays the countries defined on the Set up country names window (from Customers, select Set up tables > Country names).

Default Shipping Method

Enter a default shipping method for a country. Select the Find icon to look up a shipping method.

Shipping methods are defined on the SHIP_METHOD general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

To assign a default shipping method to a country

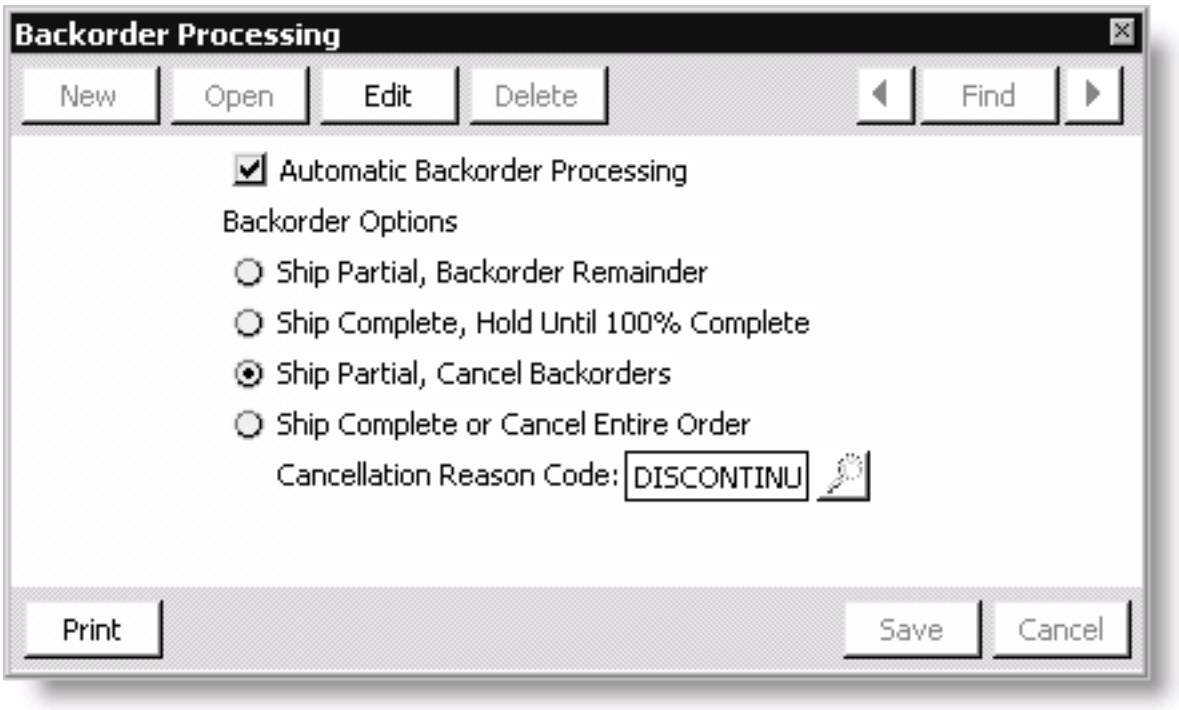
1. From Orders, select Set up module to open the Set up module window.
2. Click Add-on Charges to open the Add-on Charges window.
3. Click Default Shipping Configuration to open the Default Shipping Configuration window.
4. Select a Country for which you want to assign a default shipping method.
5. Click Edit.

6. Enter a Default Shipping Method, or select the Find icon to look up a shipping method.
7. Click Save.

Defining backorder options

iMIS Orders offers several options when processing backorders. Backorder options are defined on the Backorder Processing window. See "Backorders" for more on managing and processing backorders.

Backorder Processing window



From Orders, select Set up module, and click Backorders

Automatic Backorder Processing

Enable to release backorders automatically when you enter and post product inventory receipts.

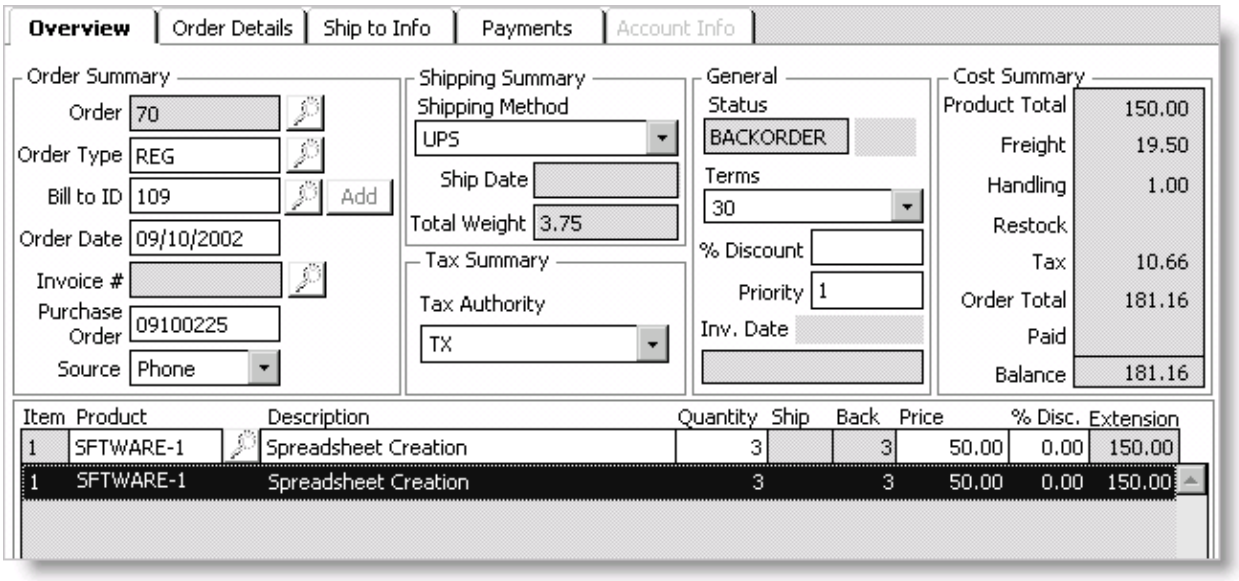
Backorder Options

When you enable Automatic Backorder Processing, you have several Backorder Options that you can enable on the Backorder Processing window. The Backorder Options allow you to define specific parameters for how iMIS processes backorders:

Ship Partial, Backorder Remainder

The Ship Partial, Backorder Remainder option enables by default when you use Automatic Backorder Processing and is the most widely used backorder processing option. The Ship Partial, Backorder Remainder option performs the following backorder processing tasks when enabled:

- Backorder Entire Order - When all of the products ordered are on backorder, iMIS automatically places the order in backorder status. When any ordered products become available through posted inventory receipts, the order is released from backorder status to the first processing stage for the given order type. If any of the ordered products remain on backorder, the order follows the processing steps for a partially shippable order.



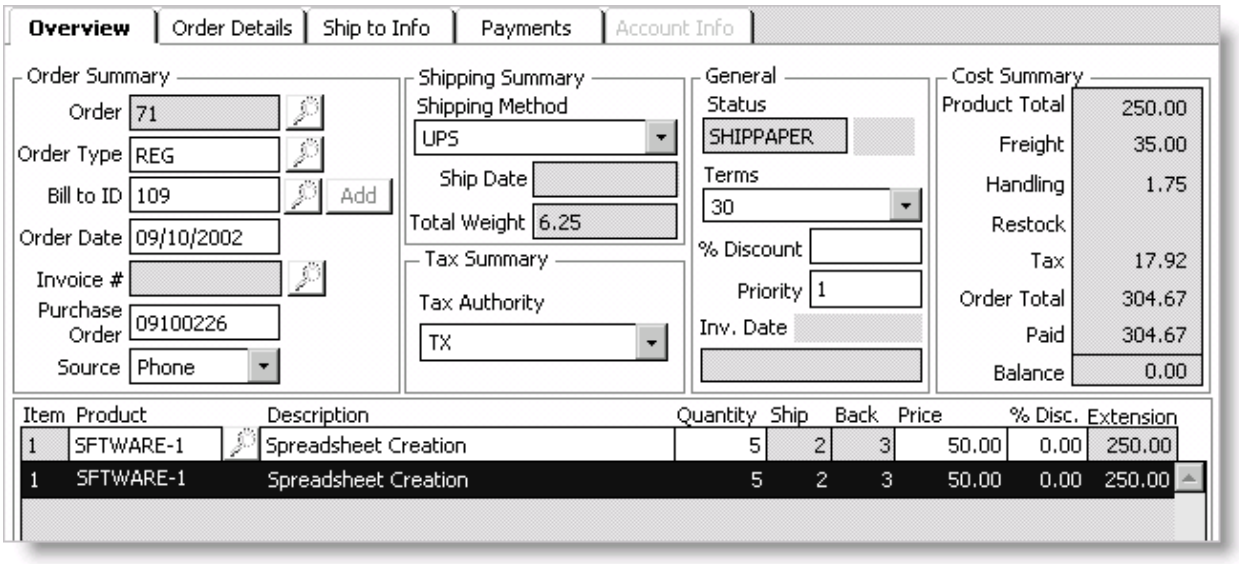
Example of a backorder

- Ship Partial Order - When some of the products ordered are on backorder, iMIS automatically places the order in the first processing stage for the given order type, such as PICKLIST, SHIPPAPER, or INVOICE, as with complete orders.

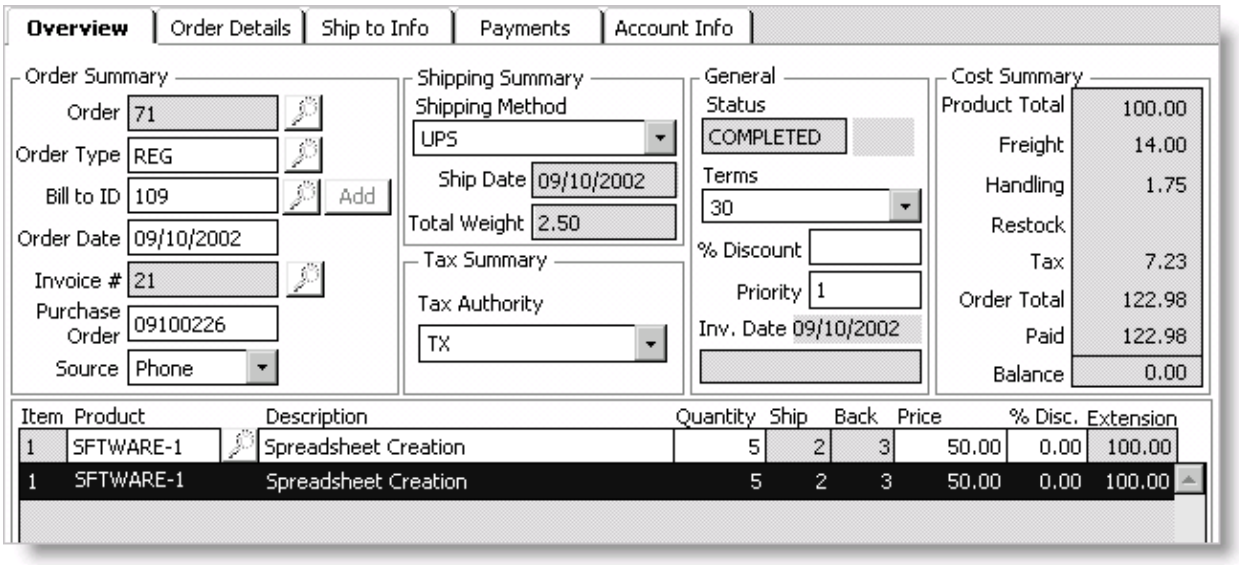
If one or more of the ordered products remain backordered when the order is invoiced, iMIS proceeds with the following steps during the invoicing stage:

- iMIS recalculates the original order's product totals to include only the quantities actually shipped.
- iMIS generates an extended suborder, which is assigned the original order transaction number plus .01, such as 208.01. The extended suborder consists only of the back-ordered products remaining when the original order was invoiced. The original order retains the backordered product's product code with an Extension price of 0.00 as displayed on the Enter and edit orders window.
- Any prepaid cash amounts are split appropriately between the original order and the extended suborder. The original order's cash amount equals the lesser of the full cash amount or the invoiced total. All remaining cash applies to the extended suborder.

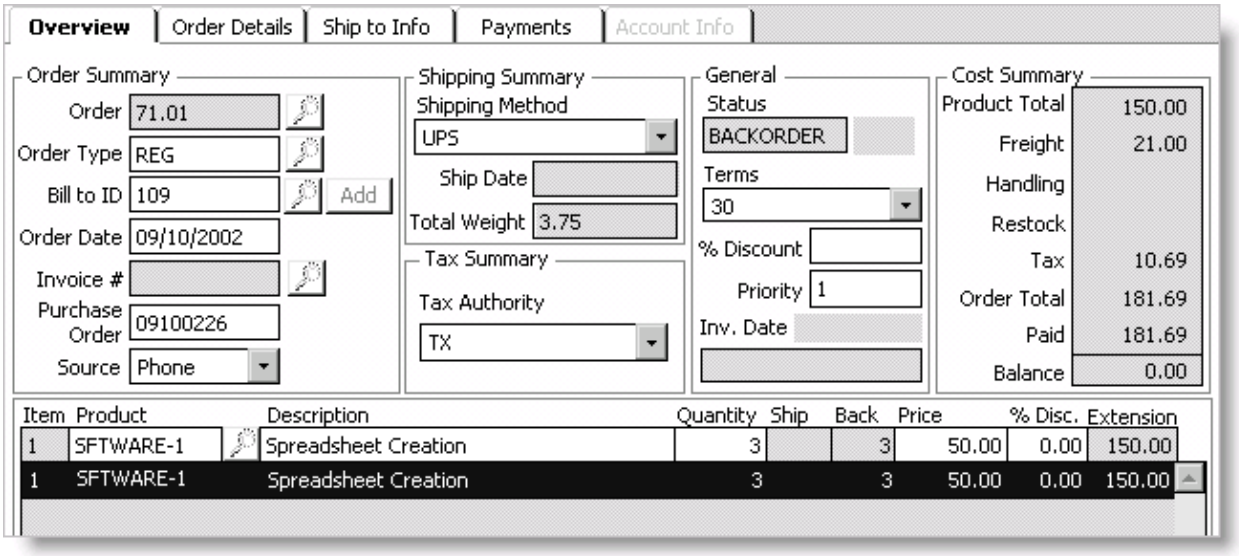
  Note: An extended suborder can continue to generate additional extended suborders for products that remain on backorder.



Example of a partially shippable order with full payment before invoicing



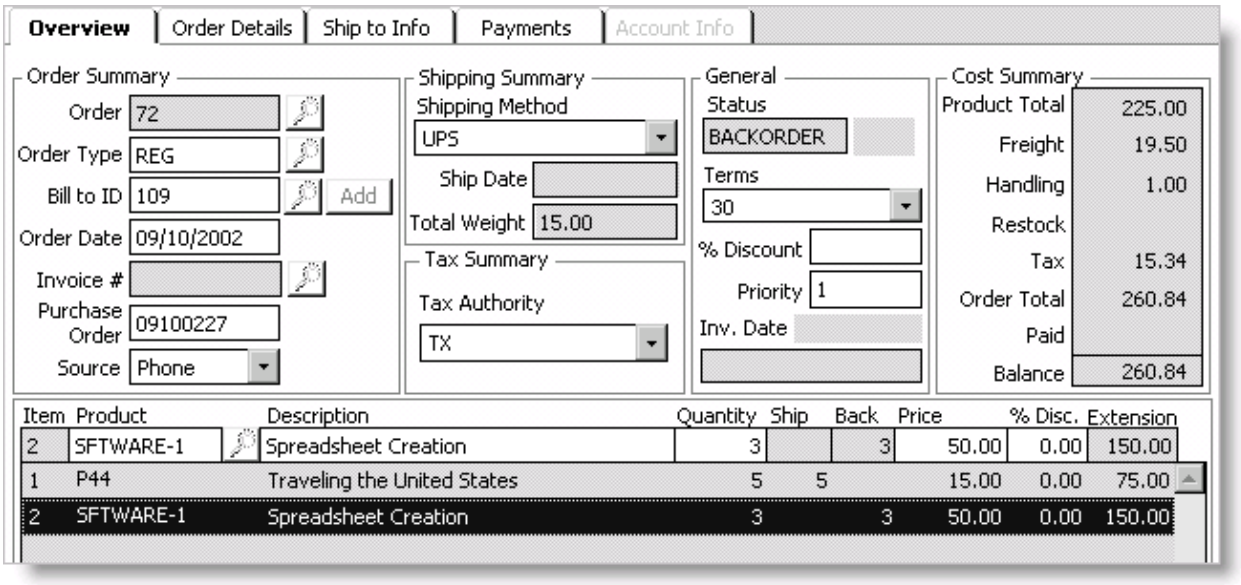
Example of a partially shipped order after invoicing. Note that the Extension price does not reflect the backordered products. Taxes were recalculated for the shipped products, and only the cash relevant to the shipped total is applicable for the order.



Example of an extended suborder, Order # 208.01, generated for Order # 208. Note that the remaining prepaid cash has been applied to suborder 208.01. Handling fees are charged on original orders and not on extended suborders.

Ship Complete, Hold Until 100% Complete

If you enable the Ship Complete, Hold Until 100% Complete option, iMIS does not ship an order until all ordered products are available in inventory. Orders for products with insufficient inventory are placed on backorder whether or not the products are fully backordered or partially shippable. No extended suborders are generated because the order does not have any backordered quantities remaining when it is shipped and invoiced.

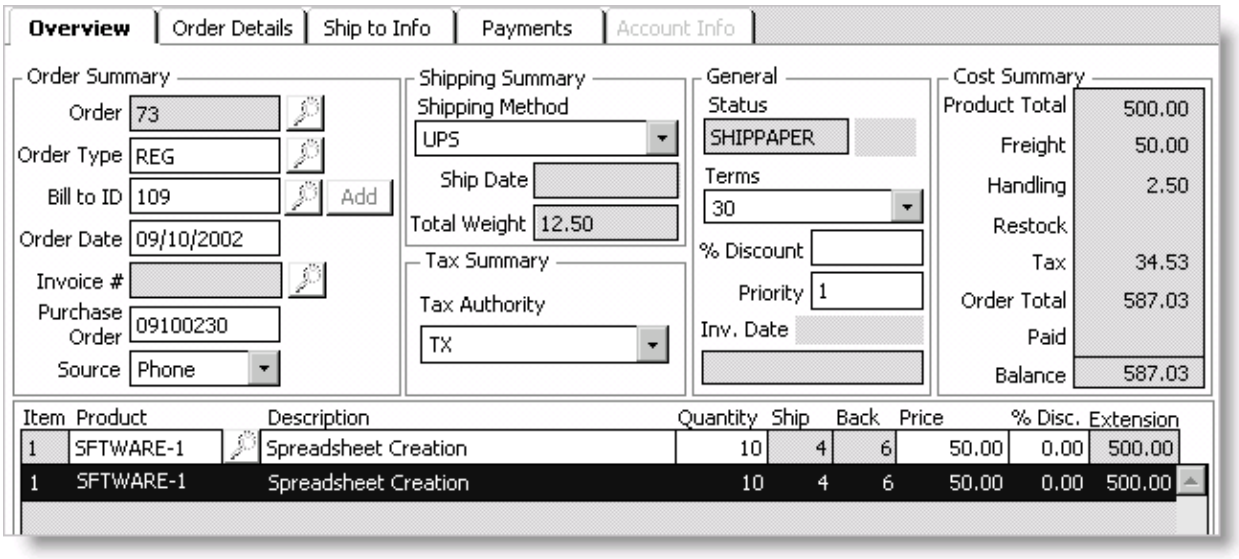


Example of a partially shippable order in backorder status when the Ship Complete, Hold Until 100% Complete option is enabled

Ship Partial, Cancel Backorders

If you enable the Ship Partial, Cancel Backorders option, iMIS treats backorders as normal orders upon data entry. However, unlike complete and ship partial orders, you are prompted to cancel the backordered products (or the entire order if it is completely backordered) at the Invoice orders processing stage.

If you do not cancel the backordered products when invoicing the order, an extended suborder is generated for the backordered products. The original order then goes automatically to the first processing stage for the given order type, such as PICKLIST, SHIPPAPER, or INVOICE.



Example of a partially shippable order before invoicing when the Ship Partial, Cancel Backorders option is enabled

Ship Complete or Cancel Entire Order

If you enable the Ship Complete or Cancel Entire Order option, you can cancel partial or completely backordered orders at order entry. When an order is entered for any product on backorder, a message displays prompting you to cancel the order instead of generating a backorder. If you elect not to cancel the order, the order does not ship until all products are available in inventory just as if the Ship Complete, Hold Until 100% Complete option were enabled.

Cancellation Reason Code

(Displays when the Ship Partial, Cancel Backorders option is enabled) Enter a reason code for canceling orders. Select the Find icon to look up a cancellation reason code.

Cancellation reason codes are defined on the CANCELLATION general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

To define backorder options

1. From Orders, select Set up module to open the Set up module window.

2. Click Backorders to open the Backorder Processing window.
3. Click Edit.
4. Enable the appropriate backorder options.
5. Click Save.

Enabling backordering on the web

To allow out-of-stock items to be purchased in the web views, enable the Allow purchase of out-of-stock items checkbox (System Setup > Set up commerce web components > Store configuration).

The backordered purchase is processed as a pro forma order and created as if the item is in stock and will be shipped. However, the product inventory is not affected at the time of the order.

When an out-of-stock item is in the cart during checkout, the cart issues a message about the backordered state. The backorder quantity displayed is based on the product availability at the time the order is placed.

You can customize the out-of-stock and backorder messages that appear during the order process. The out-of-stock message appears on the Product Detail page. The backorder message appears on the My Cart, Review, and Order Summary pages, and in the Order Confirmation sent by email.

If the Allow purchase of out-of-stock items checkbox is cleared, orders containing out-of-stock items can not be processed in the web views.

To enable backorders in the web views

1. From System Setup, select Set up commerce web components > Store configuration.
2. Select the Allow purchase of out-of-stock items checkbox.
3. (Optional) Customize the out-of-stock and backorder messages.

Only one backorder message displays in the web views. The backorder message displayed is based on the backorder option selected on the Backorder Processing window (from Orders, select Set up module, and click Backorders).

4. Click Save.

Disabling multiple warehouses

The following rules apply for disabling the Enable Multi-Warehouses option after posting inventory transactions and entering orders with the option enabled:

- Each stock item can have only one warehouse defined on the Warehouses window, and the warehouse must equal the default system warehouse defined on the Inventory System Setup window.
- A stock item's total product inventory must equal the total inventory in the product's default warehouse on the Manage products window.
- Each default warehouse defined for a stock item on the Manage products window must equal the default warehouse defined on the Inventory System Setup window.
- For all open orders for stock items, all of the products must be ordered from the default warehouse as defined on the Manage products window.

If one of the previous rules is not true, you will not be able to disable the Enable Multi-Warehouses option. To disable the option, you will have to do the following:

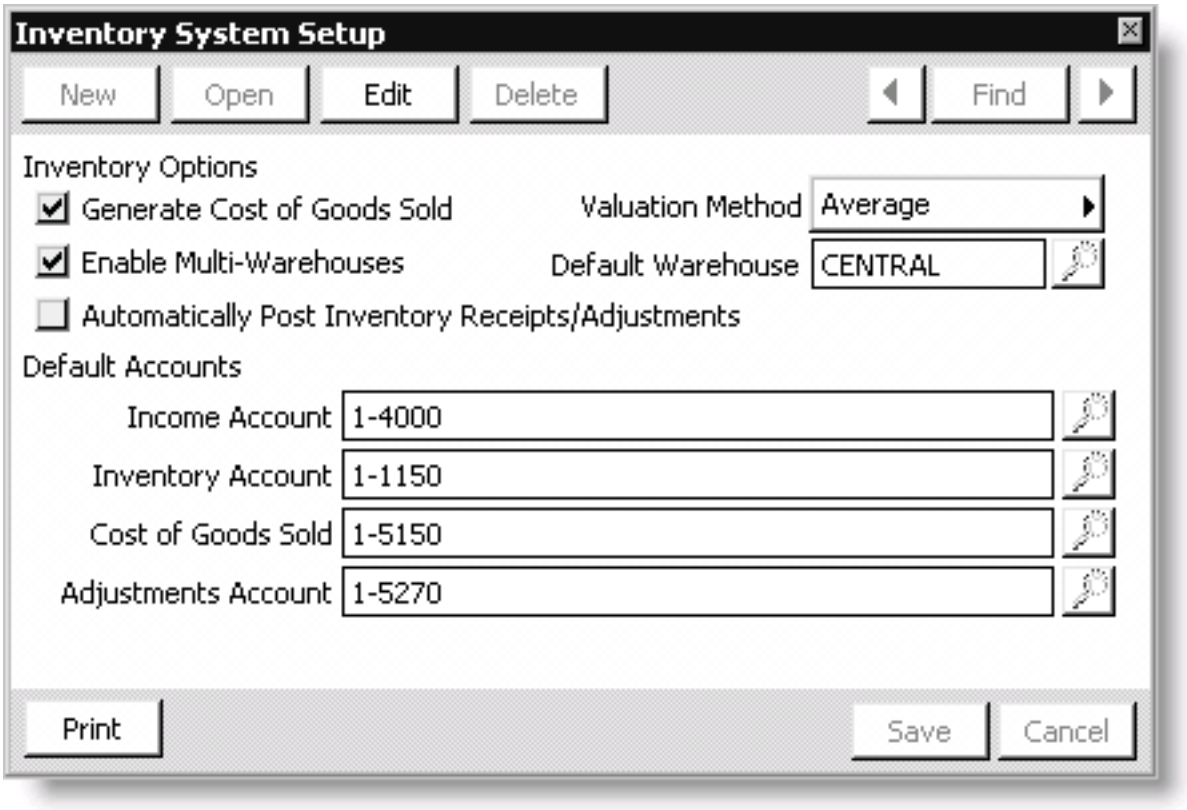
1. Close all open orders.
2. Change each stock item's default warehouse on the Manage products window to equal the default warehouse defined on the Inventory System Setup window.
3. Move all of a product's inventory to the default warehouse (you can do this by entering and posting inventory adjustments and warehouse transfers).
4. Delete all warehouses defined for a product on the Warehouses window except the default warehouse.

Defining inventory options

iMIS Orders allows you to define the following options that are useful in managing your product inventory:

- Generate cost of goods sold
- Use multiple warehouses
- Define a default warehouse
- Post inventory receipts and adjustments automatically
- Determine the valuation method for your inventory

Inventory System Setup window



From Orders, select Set up module, and click Inventory

Inventory Options

Generate Cost of Goods Sold - Enable to track the cost of the products you sell. The cost of the products sold posts to the Inventory and Cost of Goods Sold accounts during the Invoice orders process. The Valuation Method field displays when you enable the Generate Cost of Goods Sold option.

Valuation Method - (Displays when the Generate Cost of Goods Sold option is enabled) Select the method you want to use to value your product inventory:

- Average - Select this method to determine the cost of goods sold as averaged over time.

Average unit cost is calculated by dividing average total inventory cost by inventory on hand. Average total inventory cost is calculated using a two-step process:

- The total average unit cost of all invoiced products is subtracted from the average total inventory cost.
- The average total inventory cost then is divided by the updated product inventory on hand.

A product's inventory on hand is recalculated each time products are invoiced. A product's average unit cost and average total inventory cost are recalculated each time inventory transactions are posted. The Product_Inventory.AVERAGE_COST field updates upon invoicing.

When you invoice a product order, the product's average unit cost is calculated according to the product quantity on hand and the average total product inventory cost. This average total inventory cost can change every time you post an inventory transaction.

For example, if you post inventory receipts for an individual product at a cost of $10 and $15 per unit, the total inventory on hand is two units, the average total inventory cost is $25, and the average product cost is $12.50. If you then sell one product and invoice the order, the total inventory on hand is one unit, the average total inventory cost is $25, and the average product cost is $12.50.

However, if you then post another single product receipt for $15, the total inventory on hand is again two units, but the average total inventory cost and average product cost will

be different: The average total product inventory cost will be $27.50 and the average product cost will be $13.75.

To calculate the average total product inventory cost, subtract the total average product cost of the invoiced products ($12.50) from the average total product inventory cost ($40 - $12.50 = $27.5). To calculate the average product cost, divide the new average total product inventory cost ($27.5) by the current product inventory on hand ($27.5 / 2 = $13.75).

- Standard Cost - Select this method to use a fixed cost to determine the cost of goods sold. Depending on whether Multi-Warehouses is enabled, the Standard Cost is entered manually on either the Inventory or the Warehouses window, allowing you to build overhead costs into your cost of goods sold.

  Enable Multi-Warehouses - Enable if individual products are stored in multiple warehouse locations. Warehouse locations are defined on the LOCATION general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

  Enabling the Enable Multi-Warehouses option after posting products to inventory does not directly affect product inventory. As with all system setup changes throughout iMIS, changes do not update existing records. You simply need to enter your products' warehouses and inventory information on the Warehouses window (from Orders, select Manage inventory > Manage products, select a product from the list of Current Products, and click Warehouses).

  Default Warehouse - (Enables only if the Enable Multi-Warehouses option is enabled) Enter the default warehouse you want to use when defining new products. Select the Find icon to look up a warehouse; warehouse locations are defined in the Set up warehouses window (from Orders, select Set up warehouses).

  The warehouse entered displays by default in the Default Warehouse field on the Manage products window when defining new products. You can override a product's default warehouse on the Manage products window at any time.

Automatically Post Inventory Receipts/Adjustments - (Most users should not enable this option) Enable to post inventory transactions automatically. If you do not enable this option, you still can verify and edit your inventory transactions before posting them.

Since posted inventory transactions cannot be edited, automatically posting inventory receipts, adjustments, and transfers is not recommended. Also, if you automatically post inventory receipts, iMIS automatically commits the products in inventory and releases backorders.

Default Accounts

Income Account - Enter the default income account to which income posts. This account is used when an income account is not defined at the warehouse, product, or category level. If you leave this field blank, the income account will not be populated.

Inventory Account - Enter the default inventory account used for recording inventory reductions. This account is used when an inventory account is not defined at the warehouse, product, or category level. If you do not track your product inventory, you do not need to enter an account number.

> **Note:** Note: iMIS does not create an accounting entry when inventory is received. The system assumes that the entry is made to the General Ledger or Accounts Payable when receiving or paying for inventory.

Cost of Goods Sold - Enter the default account used for recording inventory costs when invoicing orders. This account is used if you do not define a cost of goods sold account at the warehouse, product, or category level.

Adjustments Account - Enter the default account used for posting inventory adjustments. This account is used if you do not define an inventory account at the warehouse, product, or category level. The Adjustments Account offsets inventory when you post inventory adjustments, for example, when inventory cost and quantity are adjusted for loss or damage.

Enabling multiple warehouses

How you manage your product inventory depends on whether you store each individual product in a single warehouse or in multiple warehouses. If you store individual products in a single warehouse, then you will be using standard inventory, and the Enable Multi-Warehouses option does not need to be enabled. However, if you store individual products in multiple warehouses, then you do need to enable the option.

Enabling the Enable Multi-Warehouses option allows you to define multiple warehouse locations for each of your individual products; you have the ability to record and manage a product's inventory for each individual warehouse location. You also have the ability to define a specific bin where products are stored within each individual warehouse.

Enabling the option after products have been posted to inventory does not affect product inventory directly. However, once you enable the Enable Multi-Warehouses option, you completely alter the way iMIS Orders records your product inventory. In turn, this affects how you manage your products and product inventory.

The following summarizes the effects enabling the Enable Multi-Warehouses option has on windows:

- Enter and edit receipts and adjustments window

  Transfer option - Displays for transferring products from warehouse to warehouse.

  Warehouse field(s) and Bin field(s) - Display for entering inventory receipts, adjustments, and transfers for specific products' warehouses.

- Manage products window

  Default Warehouse field - Displays for entering a product's default warehouse.

  Warehouses button - Replaces the Inventory button and opens the Warehouses window. The Warehouses window replaces the Inventory window and is used for entering warehouses and defining inventory parameters for individual products.

- Product Detail window

Warehouse field - Displays for overriding a product's default warehouse when entering or editing an order.

Bin field - Displays the location in the warehouse where a product is stored.

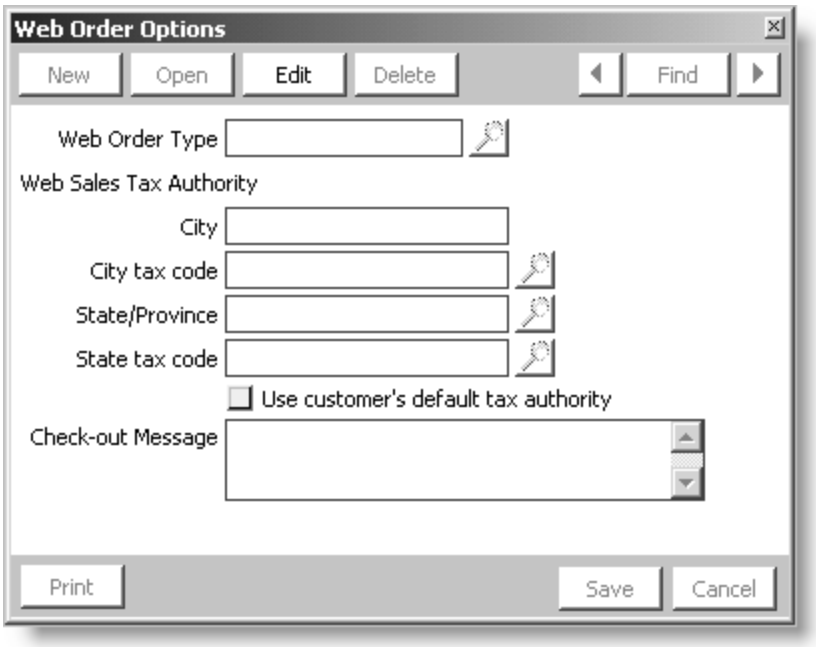
To define inventory options

1. From Orders, select Set up module to open the Set up module window.
2. Click Inventory to open the Inventory System Setup window.
3. Click Edit.
4. Enable the applicable Inventory Options.
5. Enter the Default Accounts.
6. Click Save.

Defining web order options

iMIS allows you to define default order types, tax authority, and tax codes for orders placed over the Web.

Web Order Options window



From Orders, select Set up module, and click Web

Web Order Type

Enter the default order type for orders placed over the Web. Select the Find icon to look up an order type; order types are defined on the Set up order types window (from Orders, select Set up tables > Order types).

All orders placed over the Web are entered initially as pro forma (PF) orders, allowing you to verify both customer and order information. After verification, you can convert and process an order through its appropriate order processing stages.

Web Sales Tax Authority

The Web Sales Tax Authority options allow you to define the tax codes for orders placed over the Web. If the customer's ship to address (city and/or state) match the ones entered in the Web Sales Tax Authority or the State's tax authority in the Web setup in iMIS, the web view shows the calculated taxes. If these settings do not match, no taxes are assessed. The logic behind this is that you are assessed taxes if the organization you are ordering from is located in the same city and/or state.

- City - Enter the city from where you want to generate your Web orders.
- City tax code - Enter the tax code for the city or municipality entered in the City field if taxes are applicable. Tax codes are defined on the Set up tax codes window (from Orders, select Set up tables > Tax codes).
- State/Province - Enter the state from where you want to generate your Web orders. State/Province codes are defined on the State/province codes window (from Customers, select Set up tables > State/province codes).
- State tax code - Enter the tax code for the state or province entered in the State/Province field. Tax codes are defined on the Set up tax codes window (from Orders, select Set up tables > Tax codes).

Note: Note: You must enter a tax authority and a tax code for taxes to be calculated and applied. For example, if you specify a State/Province but no State tax code, no tax is calculated.

Use customer's default tax authority

The Use customer's default tax authority option displays on the Web Order Options window only when the selected Taxation Method is set to Default on the Organization Names window.

> **Note:** Note: If the Canadian or VAT taxation method is enabled, the Use customer's default tax authority option is not displayed.

(e-Orders only) The Use customer's default tax authority option enables you to collect tax locally for orders placed over the Web. If this option is enabled, the bill-to contact default tax authority is used based on the customer's Default Tax code defined on the Financial tab of the Manage Customers window. If a Default Tax code is not defined for the customer, then e-Orders uses the city's tax authority when the 'Ship To' city (and state) match the Web Sales Tax Authority or the state's tax authority when only the 'Ship To' state matches the Web Sales Tax Authority settings. When the Use customer's default tax authority checkbox is cleared, e-Orders uses the city's tax authority when the 'Ship To' city (and state) match the Web Sales Tax Authority or the state's tax authority when only the 'Ship To' state matches the Web Sales Tax Authority. If there is no match, no tax is charged.

Check-out Message

Enter the message you want to display on your order checkout page.

To define web order options

1. From Orders, select Set up module to open the Set up module window.
2. Click Web to open the Web Order Options window.
3. Enter PF for the default Web Order Type.

   Note: The pro forma order type (PF) is required.
4. Define your Web Sales Tax Authority options by entering both a tax authority and a tax code.

5. (optional) Enable the Use customer's default tax authority option.
6. Enter the Check-out Message you want to display on your order checkout page.
7. Click Save.

Using a customer's default tax authority

The Use customer's default tax authority option is on the Web order options window (Orders > Set up module > Web). A tax authority and a tax code must be specified in the Web order options window for taxes to be calculated and applied.

When Enabled

When Use customer's default tax authority is enabled, iMIS automatically calculates taxes, for product orders placed over the web, based on the customer's Default Tax code. The Default Tax code is defined on the Financial tab of the Manage customers window (Customers > Manage customers > Financial tab).

If a Default Tax code is not defined for the customer, the Public view uses the city's tax authority when the Ship to city and state match, or the state's tax authority when only the Ship to state matches.

When Disabled

When Use customer's default tax authority is disabled, the Public view uses the city's tax authority when the Ship to city and state match, or the state's tax authority when only the Ship to state matches.

> **Note:** Note: If there is no match for Ship to city or Ship to state and/or the tax authority is unassigned, no tax is applied.

When using Canadian or VAT taxation methods

The Use customer's default tax authority option displays on the Web order options window only when the Taxation Method is set to Default on the Organization Names window (File > System Setup > Organization Names).

If the Taxation Method is set to Canadian or VAT, the Use customer's default tax authority option will not display.

Orders References

In the iMIS Importers and Exporters section, see Orders Importer.

Product status codes

You can assign status codes to your products that provide additional flexibility for managing, maintaining, and controlling your products and product availability. In addition, Upsell/Cross-sell/Replacement product functionality is dependent on the status codes you define for your products.

When you save an order, iMIS verifies each ordered product's status and available inventory to ensure fulfillment of the order. Only orders for products with an Active status (or an Out of Production status with sufficient inventory) can be saved.

Assigning status codes to products

The default status for all new products is Active, and you can assign the following status codes to your products at any time during a product's life cycle:

- Active (A)
- Inactive (I)
- Mark for Deletion (D)
- Not Available (N)
- Out of Production (O)

Active products

The default status for all new products is Active. Active products are always available for sale to your customers except during periodic fluctuations in inventory. When an Active product has insufficient inventory in stock to fill an order, the product is backordered until sufficient inventory exists for delivery.

Order Entry Cases - During order entry, Active products have the following functional characteristics:

- Can be ordered when the number of products in inventory is greater than or equal to zero.
- Cause the creation of backorders when the order quantity exceeds the number of products in inventory.
- Display on the Product Find window when returned from a product search.
- Cause the Opportunities window to open when you Tab out of the Product field (if Upsell and/or Cross-sell items are designated for the product):
- Allow the substitution of Upsell items (if designated).
- Allow the addition of Upsell and Cross-sell items (if designated).

Inactive products

Products that have an Inactive status are temporarily unavailable for sale to your customers. However, you still can maintain inventory for an Inactive product.

Possible reasons for assigning an Inactive status to a product include an interruption of supply (for example, a supplier has gone out of business, or the product is part of an embargoed shipment), you are awaiting regulatory approval to sell the product, or the product is a seasonal item.

Order Entry Cases - During order entry, Inactive products have the following functional characteristics:

- Cannot be ordered regardless of the inventory level.
- Do not display on the Product Find window when searching for products.
- Cause the Product field to clear and the Product Find window to open when you Tab out of the Product field.
- Do not allow the Opportunities window to open (regardless of whether Upsell/Cross-sell/Replacement items are designated for the product):
- Do not allow the substitution of Upsell/Replacement items (if designated).
- Do not allow the addition of Cross-sell items (if designated).

Products marked for deletion

Products that have a status of Mark for Deletion are no longer available for sale to your customers, and the inventory has been sold, returned, or destroyed. Reasons to keep products that have a Mark for Deletion status in your system are for historical reporting and to prevent reusing a previously assigned product code.

Products with a Mark for Deletion status have the same functional characteristics as Inactive products. No Replacement item should be designated for a product that has a status of Mark for Deletion.

Products that are Not Available

Products that have a status of Not Available are no longer available for sale to your customers and can include discontinued and recalled items. The entire product inventory has been sold, returned, or destroyed.

The primary reason to keep Not Available products in your system is for identifying Replacement items when customers request an unavailable or discontinued product (requires designating at least one Replacement item for the product). You cannot save orders for products that have a status of Not Available, but customers can order Replacement items.

Order Entry Cases - During order entry, Not Available products have the following functional characteristics:

- Cannot be ordered regardless of inventory level.
- Display on the Product Find window when searching for products.
- Cause the Product field to clear when you Tab out of the Product field.
- Cause the Opportunities window to open when you Tab out of the Product field (if Upsell and/or Replacement items are designated for the product). You then are required to do one of the following:
- Select an Upsell or Replacement item (if designated) to replace the entire number of units ordered.
- Enter another Product code.

Products that are Out of Production

Products that have an Out of Production status cannot be reordered from suppliers and are available for sale to your customers only up to the current inventory level. You can sell an Out of Production product only if the product's quantity-on-hand is greater than zero.

Once you deplete an Out of Production product's current inventory, iMIS treats any additional sales of the product as if the product's status is Not Available.

Order Entry Cases - During order entry, Out of Production products have the following functional characteristics:

- Can be ordered only when the number of products in inventory is greater than zero.
- Display on the Product Find window when returned from a product search.
- Can be replaced with Upsell items (if designated).
- Allow the addition of Upsell and Cross-sell items (if designated).
- Cause the Opportunities window to open when you Tab out of the Product field (if Upsell and/or Cross-sell items are designated for the product):
- Allow the substitution of Upsell items (if designated).
- Allow the addition of Upsell and Cross-sell items (if designated).
- Cause the Opportunities window to open if the order Quantity exceeds the quantity available in inventory. You then must do one of the following:
- Select an Upsell or Replacement item for the entire number of units ordered (the order Quantity remains unchanged).
- Select an Upsell or Replacement item to replace the units ordered in excess of the available inventory:
- The Out of Production product's order Quantity updates to reflect the maximum quantity available in inventory.

- A new line item is added for the Upsell or Replacement item, and the new item's order Quantity equals the difference between the Out of Production product's original order Quantity and the available inventory.
- The Opportunities window closes.
- Click Close on the Opportunities window to update the Out of Production product's order Quantity to equal the number of units available in inventory.

Changing product status codes

Changes to product status codes are not retroactive, and existing orders are not affected by product status changes. When editing an order on the Overview tab of the Enter and edit orders window, if you tab out of the Product field without changing the product code, iMIS does not re-verify the status of the product code. However, if a product code is changed, iMIS does verify the new product's status according to the verification requirements for entering orders.

Changing an active product's status

The default status code for all products is Active, and you can change a product's status code any time during the product's life cycle. Changes to product status codes are not retroactive and do not affect existing orders.

Depending on a product's original status, additional restrictions may apply when changing status codes if the product also is one of the following:

- Kit
- Kit component
- Upsell/Cross-sell item for another product
- Replacement item for another product

> **Note:** Note: Kit components are required to have an Active status if the parent kit product's status also is Active, and you must remove a product from all Active kits before changing its status.

> **Note:** Note: Changing the status of a kit component does not flow down to the component's parent kit. However, when a parent kit product's status is changed, you can change the status of all of the kit components as long as the components do not belong to other kits.

Active >> Inactive

Once you change a product's status from Active >> Inactive, the product is no longer available for sale to customers, and iMIS does not return the product from searches during order entry.

Additional restrictions apply when changing a product's status from Active >> Inactive if the product also is a kit, kit component, Upsell/Cross-sell item, or Replacement item.

Active >> Mark for Deletion

Once you change a product's status from Active >> Mark for Deletion, the product is no longer available for sale to customers, and iMIS does not return the product from searches during order entry.

If any of the following conditions are true when changing a product's status from Active >> Mark for Deletion, an error will display, the status change will fail, and iMIS will reset the product's status to Active:

- The product has pending inventory transactions.
- The product has inventory in stock.
- The product has entries in the Product_Price table.

Additional restrictions apply when changing a product's status from Active >> Mark for Deletion if the product also is a kit, kit component, Upsell/Cross-sell item, or Replacement item.

Active >> Not Available

To change a product's status from Active >> Not Available, you first must designate a Replacement item for the product on the Upsell/Replace window. Only if you designate a

Replacement item for the product can you change the product's status from Active >> Not Available.

Additional restrictions apply when changing a product's status from Active >> Not Available if the product also is a kit, kit component, Upsell/Cross-sell item, or Replacement item.

Active >> Out of Production

To change a product's status from Active >> Out of Production, you first must designate a Replacement item for the product on the Upsell/Replace window. Only if you designate a Replacement item for the product can you change the product's status from Active >> Out of Production.

Once you change a product's status from Active >> Out of Production and deplete the product's current inventory, iMIS treats additional sales of the product as if the product's status is Not Available.

Additional restrictions apply when changing a product's status from Active >> Out of Production if the product also is a kit, kit component, Upsell/Cross-sell item, or Replacement item.

Additional Restrictions

Additional restrictions apply when changing a product's status from Active >> Inactive, Mark for Deletion, Not Available, or Out of Production if the product also is one of the following:

Kit (Active >> All) - If a product with an Active status is a kit, iMIS prompts you to select either Yes or No to change the status of all kit components:

- Yes - iMIS verifies whether each component is part of another kit:
- True - If a component is part of another kit, then iMIS does not change that component's status.
- False - If a component is not part of another kit, then iMIS changes that component's status.

- No - iMIS changes only the product kit's status and does not change the status of the kit components.

  Kit component (Active >> All) - Only products with an Active status can be components of kits with an Active status. To change an Active component's status when the parent kit's status is Active, you first must remove the component from the kit.

  Upsell/Cross-sell item (Active >> All) - If a product with an Active status is an Upsell/Cross-sell item for other products (or has Upsell/Cross-sell items assigned to it), iMIS deletes the relationships from the appropriate tables when you change the product's status.

  Replacement item (Active >> Inactive, Not Available, and Out of Production) - If a product with an Active status is a Replacement item for other products, iMIS deletes the relationships from the appropriate tables when you change the product's status. Relationships for this product's Replacement items are not affected.

  Replacement item (Active >> Mark for Deletion) - If a product with an Active status is a Replacement item for other products (or has a Replacement item designated for it), iMIS deletes the relationships from the appropriate tables when you change the product's status from Active to Mark for Deletion.

Changing an Inactive, Not Available, or Out of Production product's status

The following rules apply when changing an Inactive, Not Available, or Out of Production product's status:

Inactive, Not Available, or Out of Production >> Active, Not Available, or Out of Production

Unless the product is a kit, no restrictions exist for changing a product's status from Inactive, Not Available, or Out of Production to Active, Not Available, or Out of Production.

Not Available or Out of Production >> Inactive

Once you change a product's status from Not Available or Out of Production to Inactive, the product is no longer available for sale to customers, and iMIS does not return the product from searches during order entry.

Additional restrictions apply if the product also is a kit.

Inactive, Not Available, or Out of Production >> Mark for Deletion

Once you change a product's status from Inactive, Not Available, or Out of Production >> Mark for Deletion, the product is no longer available for sale to customers, and iMIS does not return the product from searches during order entry.

If any of the following conditions are true when changing a product's status from Inactive, Not Available, or Out of Production >> Mark for Deletion, an error will display, the status change will fail, and iMIS will reset the product to its original status:

- The product has pending inventory transactions.
- The product has inventory in stock.
- The product has entries in the Product_Price table.

  Additional restrictions apply if the product also is a kit or Replacement item.

  Additional restrictions

  Additional restrictions apply when changing an Inactive, Not Available, or Out of Production product's status if the product also is one of the following:

  Kit (Inactive, Not Available, or Out of Production >> Active) - If a product with an Inactive, Not Available, or Out of Production status is a kit, iMIS prompts you to select either Yes or No to change the status of all kit components:

- Yes - The status of the kit and all kit components changes.
- No - The status change fails; all kit components must have an Active status.

  Kit (Inactive, Not Available, or Out of Production >> Inactive, Mark for Deletion, Not Available, or Out of Production) - If a product with an Inactive, Not Available, or Out of Production status is a kit, iMIS prompts you to select either Yes or No to change the status of all kit components:

- Yes - iMIS verifies whether each component's status equals the original, unchanged status of the parent kit:

- True - iMIS then verifies whether the component also is a component of another kit:
- True - iMIS does not change the component's status.

  False - iMIS changes the component's status to equal the status of the parent kit.
- False - iMIS does not change the component's status.
- No - iMIS changes only the product kit's status and does not change the status of the kit components.

  Replacement Item (Inactive, Not Available, or Out of Production >> Mark for Deletion) - If a product with an Inactive, Not Available, or Out of Production status has a Replacement item designated for it, iMIS deletes the relationship from the appropriate table when you change the product's status to Mark for Deletion.

  Verifying a product's status during order entry

  When entering and editing orders, iMIS verifies a product's status each time you Tab out of the Product field. Whether iMIS opens the Opportunities window at this stage of the order entry process depends on the product's status.

  Inactive or Mark for Deletion

  If a product's status is Inactive or Mark for Deletion, iMIS does the following:

- Clears the Product field.
- Displays a message at the bottom of the screen, “Product-code is not available”.
- Opens the Product Find window.

  Not Available or Out of Production (no inventory is available)

  If a product's status is Not Available or Out of Production, and no inventory is available, the availability of Upsell and Replacement items determines whether iMIS opens the Opportunities window:

  No Upsell or Replacement items are available - If no Upsell or Replacement items are available for the product, iMIS does the following:

- Clears the Product field (cursor remains in the field)
- Displays a message at the bottom of the screen (the message displayed depends on the product's status):
- Out of Production - “Product-code is out of production and no replacement product is available.”
- Not Available - “Product-code is not available and no Replacement Product is available.”

Upsell or Replacement items are available - If Upsell or Replacement items are available for the product, iMIS does the following:

- Clears the Product field (cursor remains in the field).
- Opens the Opportunities window listing all available Upsell and Replacement opportunities (the Replace button enables).
- Displays a message at the bottom of the Opportunities window, “Product-code is not available. Please select a replacement product, or click Close.”

If you click Replace, iMIS does the following:

- Updates the original product's line item with the Upsell or Replacement item's data.
- Recalculates the order's discounts, taxes, and prices to reflect the Upsell or Replacement item's data.
- Refreshes the Opportunities window with the Upsell or Replacement item's available opportunities.
- Refreshes each line item's Opportunities indicator.

Active or Out of Production (inventory is available)

If inventory is available for an Active or Out of Production product, and Upsell, Cross-sell, or Replacement opportunities exist, iMIS opens the Opportunities window, listing all available Upsell, Cross-sell, and Replacement opportunities.

The Replace and Add buttons enable for Upsell and Replacement opportunities, and the Add button enables for Cross-sell opportunities:

If you click Add, iMIS does the following:

- Adds a new line item for the selected Upsell, Cross-sell, or Replacement item with the Qty set to zero.
- Refreshes the Opportunities window (the item added to the order is removed from the window).
- Refreshes each line item's Opportunities indicator.
- Maintains focus on the first line item (the initial product ordered) until all Upsell, Cross-sell, and Replacement opportunities have been exhausted.

If you click Replace, iMIS does the following:

- Updates the original product's line item with the Upsell or Replacement item's data.
- Refreshes the Opportunities window with the Upsell or Replacement item's existing opportunities.
- Recalculates the order's discounts, taxes, and prices to reflect the Upsell or Replacement item's data.
- Refreshes each line item's Opportunities indicator.
- Maintains focus on the first line item (the original Replacement item) until all Upsell, Cross-sell, and Replacement opportunities have been exhausted.

Verifying a Product's Available Inventory during Order Entry

When entering and editing orders, iMIS verifies a product's available inventory each time you Tab out of the Qty field. Whether iMIS opens the Opportunities window at this stage of the order entry process depends on the product's status.

Active

If a product's status is Active, and you enter a Qty that is greater than the quantity available in inventory, backorder processing occurs as in previous versions of iMIS.

Out of Production

If a product's status is Out of Production, and you enter a Qty that is greater than the product quantity available in inventory, iMIS does the following:

- Resets the Qty field to equal the product's total quantity available in inventory.
- Verifies whether Upsell or Replacement items are available for the product:

  No Upsell or Replacement items are available - iMIS displays a message at the bottom of the Overview tab, “Only x remaining and no Replacement Product is available.”

  Upsell or Replacement items are available - iMIS opens the Opportunities window listing all available Upsell and Replacement opportunities (the Add and Replace buttons enable), and a message displays at the bottom of the Opportunities window, “Insufficient inventory. Replace the item, or click Add to replace the unavailable x units.”

  If you click Add, iMIS does the following:

- Adds a new line item for the Upsell, Cross-sell, or Replacement item with the Qty equal to the difference between the original quantity ordered and the quantity available in inventory.
- Refreshes the Opportunities window (the added item is removed from the window).
- Refreshes each line item's Opportunities indicator.

  If you click Replace, iMIS does the following:

- Updates the original product's line item data with the Upsell or Replacement item's data.
- Resets the Qty ordered to equal the quantity originally ordered.
- Recalculates the order's discounts, taxes, and prices to reflect the Upsell or Replacement item's data.
- Refreshes the Opportunities window with the Upsell or Replacement item's existing opportunities.
- Refreshes each line item's Opportunities indicator.

  Summarizing product status codes and upsell/cross-sell/replacement items

  The combination of product status codes, available inventory, and linked product type designations affect the behavior of the Enter and edit orders window when you tab away

from the Product field or when you enter an order Qty that is greater than the available inventory. The behavior of the Opportunities window is also affected.

- product status codes are set at the Manage products window.
- available inventory is set at various windows:
- stock item quantities are set at inventory or warehouse windows. See Product Inventory.
- non-stock items are designated at the Manage products window.
- linked product type designations are set at the Upsell/Replace window.

After entering a product code and tabbing away from the Product field

If the product status = Not Available (N) and the available inventory = none/any/non-stock:

- If there are no linked Upsell or Replacement items, nothing happens.
- If there are linked Upsell or Replacement items:
- The Product field is cleared.
- The Opportunities window opens:
- A message informs you that the specified product code is not available, advising you to instead select an alternative product.
- The Replace button is enabled.
- The linked Upsell and Replacement items are listed.

If the product status = Out of Production (O) and the available inventory = none:

- If there are no linked Upsell or Replacement items, nothing happens.
- If there are linked Upsell or Replacement items:
- The Product field is cleared.
- The Opportunities window opens:

- A message informs you that the specified product code is not available, advising you to instead select an alternative product.
- The Replace button is enabled.
- The linked Upsell and Replacement items are listed.

  If the product status = Out of Production (O) and the available inventory = any/non-stock:

- If there are no linked Upsell or Cross-sell items, nothing happens.
- If there are linked Upsell or Cross-sell items:
- The Opportunities window opens:
- The Add button is enabled.
- The Replace button is enabled if there are linked Upsell items.
- The linked Upsell and Cross-sell items are listed.

  If the product status = Active (A) and the available inventory = none/any/non-stock:

- If there are no linked Upsell or Cross-sell items, nothing happens.
- If there are linked Upsell or Cross-sell items:
- The Opportunities window opens:
- The Add button is enabled.
- The Replace button is enabled if there are linked Upsell items.
- The linked Upsell and Cross-sell items are listed.

> **Note:** Note: Linked Replacement items are ignored for products with an Active status because these products generate backorders.

After entering an order Qty that is greater than the available inventory

If the product status = Out of Production (O) and the available inventory = partial:

- If there are no linked Upsell or Replacement items, nothing happens.
- If there are linked Upsell or Replacement items:
- The Qty field resets from the value ordered to the value available.
- The Opportunities window opens:
- A message informs you that there is insufficient inventory for the specified product code, advising you to instead select an alternative product or to click Add to replace the unavailable number of units.
- The Add button is enabled.
- The Replace button is enabled.
- The linked Upsell and Replacement items are listed.

Product search results filter by status

Be aware that the products returned from searches vary according to product status and the window from which the search is performed. That is, windows only locate products of status appropriate to the window's purpose:

Enter and edit orders window	>>	A, O, and N
Enter and edit receipts and adjustments window	>>	A, O, and I
Kitting window	>>	A and Status of parent kit
Upsell/Replace window	>>	A
Upsell/Cross-sell window	>>	A

Orders accounting business rules

Understanding cash handling in orders

iMIS Orders processes order payments in different ways. How Orders processes an order payment depends on whether the payment is by check/cash or credit card and on which options you have enabled through the AR/Cash Set up module window.

Cash and check payments

When you apply a payment of cash or check to an order, iMIS immediately recognizes the payment when the order is entered. A debit to the appropriate cash account is created, and a credit is made to the Prepaid account defined on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts). Cash and check payments usually are deposited promptly and are considered “Cash on Hand.” When you subsequently invoice the order, the prepaid account is debited, and the income account specified for the product is credited.

Credit card payments

How iMIS processes orders with credit card payments depends on whether the Recognize Credit Card Order Payments as Prepaid Cash option on the AR/Cash Set up module window is enabled or disabled:

Option disabled

When you apply a credit card payment to an order, iMIS follows the policy dictated by most credit card companies, which is not to submit payment until the order has been shipped. In compliance with this policy, iMIS recognizes a credit card payment at the time an order is invoiced. If you are using batch control, this payment is recognized in the batch that was open during order entry.

To prevent credit card payments from posting to previously closed batches, enable the Create New Batch for Invoicing option on the Order Status Defaults window. When you enable this option, a new batch is created automatically for the entries generated by the invoicing process. This new batch will be numbered using the date method, such as 020726-1, and will be marked as ready for posting. It will appear on the Manage batches window (from AR/Cash, select Manage batches), and you must post the batch from there.

When processing orders with credit card payments on the Payments tab of the Enter and edit orders window, you can enter a payment amount in the Payment Amount field or leave the field blank. If you enter a credit card code in the Check #/CC field and leave the Payment Amount field blank, iMIS will make the cash amount equal to the invoice amount at the time the order is invoiced. If a payment amount is entered in the Payment Amount

field, iMIS will apply this payment against the invoiced amount. In the event of over- or underpayments, iMIS will create the appropriate accounts receivable entries.

Option enabled

When you apply a credit card payment to an order, iMIS treats the payment as a cash payment and immediately recognizes the payment when the order is entered. A debit to the appropriate cash account is created, and a credit is applied to the Prepaid account defined on the AR/Cash Default Accounts window (from AR/Cash, select Set up module, and click Default Accounts). When you subsequently invoice the order, the prepaid account is debited, and the income account specified for the product is credited.

> **Note:** Note: If you are processing orders in iMIS, you must populate the default Transfer/Clearing and Prepaid accounts on the AR/Cash Default Accounts window.

Back orders and batch control

When you enable the Create New Batch for Invoicing option on the Order Status Defaults window, a new batch is created automatically for each invoicing run. If you do not enable this option, transactions that are created when you invoice will be included in the batch in which the order was originally entered.

> **Note:** Note: Invoices are not added to batches that have a status of Ready or Posted. Instead, a new batch is created automatically and iMIS displays a message informing you that a new batch was created for those invoices whose original order batch is no longer available.

One of the most common reasons for enabling the Create New Batch for Invoicing option is managing backorders. For example, if you enter and invoice an order in January that includes a backordered product that will not be available until March, the March invoice transaction for the backorder will be in the original January batch. However, if you enable the Create New Batch for Invoicing option, the new transaction generated by the backorder will be included in a new batch that is created when the backorder is invoiced in March.

Understanding order accounting entries

The following is a list of typical order transactions with explanations of how they affect accounting entries throughout iMIS.

If Enable Multi-Warehouses is enabled on the Inventory System Setup window, warehouse will be an applicable GL account level for some entries.

> **Note:** Note: Orders does not look to AR/Cash for an Income account. If an Income account is not defined within the product's account hierarchy, then no Income account exists, and no Income account will be credited when an order for the product is invoiced.

Enter an order for a stock item without a payment	No transactions created	No transactions created
Invoice an order for a stock item without payment	The Accounts Receivable account defined on the AR/Cash Default Accounts window	The first non-blank Income account defined at the warehouse, product, category, or inventory system setup level
	The Cost of Goods Sold account specified at the warehouse, product, category, or inventory system setup level	The Inventory account specified at the warehouse, product, category, or inventory system setup level
Enter an order for a non- stock product with a non- credit card cash payment	The cash account defined for the batch, or the default cash account if no account is defined for the batch	The Prepaid account defined on the AR/Cash Default Accounts window
Invoice an order for a non-stock product with a non-credit card cash payment	The Prepaid account defined on the AR/Cash Default Accounts window	The Transfer/Clearing account defined on the AR/Cash Default

		Accounts window
	The Transfer/Clearing account defined on the AR/Cash Default Accounts window	The Income account specified at the warehouse, product, category, or inventory system setup level
Enter an order for a stock item with a credit card payment (Recognize Credit Card Order Payments as Prepaid Cash option disabled)	No transaction created	No transaction created
Invoice an order for a stock item with a credit card payment (Recognize Credit Card Order Payments as Prepaid Cash option disabled)	The cash account specified for the credit card or, if blank, the cash account associated with the original order entry batch	The Income account specified at the warehouse, product, category, or inventory system setup level
	The Cost of Goods Sold account specified at the warehouse, product, category, or inventory system setup level	The Inventory account specified at the warehouse, product, category, or inventory system setup level
Enter an order for a stock item with a credit card payment (Recognize Credit Card Order Payments as Prepaid Cash option enabled)	The cash account specified for the credit card or, if blank, the cash account associated with the batch	The Prepaid account defined on the AR/Cash Default Accounts window
Invoice an order for a stock item with a credit card payment (Recognize Credit Card Order Payments as Prepaid Cash	The Prepaid account defined on the AR/Cash Default Accounts window	The Transfer/Clearing account defined on the AR/Cash Default Accounts window

enabled)		
	The Transfer/Clearing account defined on the AR/Cash Default Accounts window	The Income account specified at the warehouse, product, category, or inventory system setup level
	The Cost of Goods Sold account specified at the warehouse, product, category, or inventory system setup level	The Inventory account specified at the warehouse, product, category, or inventory system setup level
Post a receipt for a stock inventory item	No transaction recorded	No transaction recorded
Post an inventory adjustment to reduce inventory	The Adjustments account specified at the warehouse, product, category, or inventory system setup level	The Inventory account specified at the warehouse, product, category, or inventory system setup level
Post an inventory adjustment to increase inventory	The Inventory account specified at the warehouse, product, category, or inventory system setup level	The Adjustments account specified at the warehouse, product, category, or inventory system setup level
Cancel an order that contains a recognized cash payment	The Prepaid account defined on the AR/Cash Default Accounts window	The Accounts Receivable account defined on the AR/Cash Default Accounts window
Cancel an order without payment	No transactions	No transactions
Enter a credit memo against an	No transaction	No transaction

order for a previously invoiced non-stock item (or a credit memo that does not affect inventory)		
Invoice a credit memo against an order for a previously invoiced non-stock item (or a credit memo that does not affect inventory)	The Income account specified at the warehouse, product, category, or inventory system setup level	The Accounts Receivable account defined on the AR/Cash Default Accounts window
Enter a credit memo against an order for a previously invoiced stock item	No transaction	No transaction
Invoice a credit memo against an order for a previously invoiced stock item	The Income account specified at the warehouse, product, category, or inventory system setup level	The Accounts Receivable account defined on the AR/Cash Default Accounts window
	The Inventory account specified at the warehouse, product, category, or inventory system setup level	The Cost of Goods Sold account specified at the warehouse, product, category, or inventory system setup level

Understanding order inventory transactions

The following is a list of order entry transactions and how they affect inventory. This sample assumes that all transactions are processed one at a time for the same product.

If the Enable Multi-Warehouses option is enabled on the Inventory System Setup window, each transaction affects a product's inventory at each individual warehouse location.

Receive 10 items into inventory	10			10
Enter an order for 2 items	10	2	2	8
Invoice an order for 2 items	8	0	0	8
Enter an order for 10 items	8	10	8	-2
Invoice the partially shippable order prior to receiving more inventory	0	2	0	-2
Receive 5 items into inventory (which will release the backorder)	5	2	2	3
Invoice the backorder	3	0	0	3
Enter a credit memo (which affects inventory) for 1 returned item	3	0	0	3
Invoice the credit memo for the 1 returned item	4	0	0	4
Enter a positive inventory adjustment for 1 item, and post	5	0	0	5
Enter a negative inventory adjustment for 1 item, and post	4	0	0	4

Understanding product account hierarchy

When an order is invoiced, the transaction credits the appropriate Income account. If the Generate Cost of Goods Sold option is enabled on the Inventory System Setup window, the transaction also credits the Inventory account and debits the Cost of Goods Sold account. However, which accounts actually are affected by a transaction depend on product account hierarchy.

Note: Note: Orders does not look to AR/Cash for an Income account. If an Income account is not defined within the product's account hierarchy, then no Income account exists, and no Income account will be credited when an order for the product is invoiced.

Factors determining a product's account hierarchy

- Product Type - Is a product a stock item, non-stock item, or product kit?
- Inventory Method - Is standard product inventory used, or are products stored in multiple warehouses?
- Account Data - Accounts can be defined for products on the following windows:
- Warehouses window - Multi-Warehouses only - (from Orders, select Manage inventory > Manage products, select from Current Products, and click Warehouses)
- Accounting window (from Orders, select Manage inventory > Manage products, select from Current Products, and click Accounting)
- Set up product categories window (from Orders, select Set up tables > Product categories)
- Inventory System Setup window (from Orders, select Set up module, and click Inventory)

Standard inventory

The following tables display the product account hierarchy that determines which account information is used when orders are invoiced. In determining account hierarchy, specific accounts take precedent over general accounts; accounts at the product level supersede accounts at the category and system level.

For example, if accounts are defined for a stock item at the product level, those accounts will be used when orders are invoiced. If no accounts are defined at the product level, iMIS will use the accounts defined at the category or system level.

In the following tables, order of significance is indicated numerically, the lower the number, the greater the significance. Depending on whether a product is a stock item, non-stock item, or product kit, some accounts may not be applicable; an X indicates a non-applicable account.

Note: Note: iMIS Orders does not look to AR/Cash for an Income account. If an Income account is not defined within the product's account hierarchy, then no

Income account exists, and no Income account will be credited when an order for the product is invoiced.

Stock item

Income	1	2	3
Inventory	1	2	3
Cost of Goods Sold	1	2	3

Non-stock item

Income	1	2	3
Inventory	X	X	X
Cost of Goods Sold	X	X	X

Product kit

Since product kits consist of multiple products and are treated as single, non-stock units, iMIS uses the inventory account numbers for the individual products that make up a kit.

Income	1	2	3
Inventory	X	X	X
Cost of Goods Sold	X	1	2

Multiple warehouses

The following tables display the product account hierarchy that determines which account information is used when orders are invoiced. In determining account hierarchy, specific accounts take precedent over general accounts; accounts at the warehouse level super-sede accounts at the product, category, and system levels.

For example, if accounts are defined for a stock item at the warehouse level, those accounts will be used when orders are invoiced. If no accounts are defined at the warehouse level, iMIS will use the accounts defined at the product level. If no accounts are defined at the product level, iMIS will use the accounts defined at the category or system level.

In the following tables, order of significance is indicated numerically, the lower the number, the greater the significance. Depending on whether a product is a stock item, non-stock item, or product kit, some accounts may not be applicable; an X indicates a non-applicable account.

> **Note:** Note: iMIS Orders does not look to AR/Cash for an Income account. If an Income account is not defined within the product's account hierarchy, then no Income account exists, and no Income account will be credited when an order for the product is invoiced.

Stock item

Income	1	2	3	4
Inventory	1	2	3	4
Cost of Goods Sold	1	2	3	4

Non-stock item

Income	X	1	2	3
Inventory	X	X	X	X
Cost of Goods Sold	X	X	X	X

Product kit

Since product kits consist of multiple products and are treated as single units, iMIS uses the inventory account numbers for the individual products that make up a kit.

Income	X	1	2	3
Inventory	X	X	X	X
Cost of Goods Sold	X	1	2	3

Understanding inventory accounting transactions

Accounting transactions are dependent on your method of inventory storage.

Standard inventory transactions

The following accounting transactions are created when an inventory transaction is posted:

Receipt

Accounting transactions are not created in iMIS when product inventory receipts are posted. Typically, accounting transactions occur when inventory invoices are processed through your accounting software, which affects the General Ledger account.

Inventory adjustment

Unlike product inventory receipts, product inventory adjustments create accounting transactions if the Cost of Goods Sold option is enabled on the Inventory System Setup window. Inventory adjustments create accounting transactions that affect both Inventory and Adjustments accounts. For example, an inventory adjustment that reduces a product's inventory will credit the Income account and debit the Adjustments account.

Account hierarchy determines which specific Income and Adjustments accounts are affected by inventory adjustments.

> **Note:** Note: If you are using batch control, be sure to open the appropriate batch before posting inventory adjustments.

Multiple warehouse inventory transactions

The following accounting transactions are created when a multiple warehouse inventory transaction is posted:

Receipt

Accounting transactions are not created when inventory receipts are posted for a product's warehouse. However, accounting transactions are created for a warehouse's inventory receipts when inventory invoices are processed through AR/Cash or a check is written that affects the General Ledger account.

Inventory adjustment

Unlike product inventory receipts, inventory adjustments for product warehouses create accounting transactions if the Cost of Goods Sold option is enabled on the Inventory System Setup window.

If accounts are defined at the warehouse level, inventory adjustments create accounting transactions that affect a warehouse's Inventory and Adjustments accounts. For example, an inventory adjustment that reduces a warehouse's inventory will credit the warehouse's Inventory account and debit the warehouse's Adjustments account.

Account hierarchy determines which specific Income and Adjustments accounts are affected by inventory adjustments.

> **Note:** Note: If you are using batch control, be sure to open the appropriate batch before posting inventory adjustments.

Transfer

Warehouse transfers generate accounting transactions if the Cost of Goods Sold option is enabled on the Inventory System Setup window.

If Inventory accounts are defined at the warehouse level, inventory transfers create accounting transactions that affect both warehouses' Inventory accounts. For example, an inventory transfer credits the Inventory account of the From Warehouse and debits the Inventory account of the To Warehouse.

If Inventory accounts are not defined at the warehouse level, inventory transfers do not generate noticeable accounting transactions.

Account hierarchy for inventory adjustments

Since accounts can be defined on multiple windows for both Standard Inventory and Multiple Warehouses, account hierarchy determines which specific accounts are affected by inventory adjustments.

In determining account hierarchy, specific accounts take precedent over general accounts; accounts at the warehouse and product level supersede accounts at the category and system level. For example, if accounts are defined for a stock item at the product level, those accounts will be used when adjustments are posted. If no accounts are defined at the product level, iMIS will use the accounts defined at the category or system level.

Inventory and Adjustments accounts can be defined on the following windows:

- Warehouses window - Multi-Warehouses only - (from Orders, select Manage inventory > Manage products, select from Current Products, and click Warehouses)
- Accounting window (from Orders, select Manage inventory > Manage products, select from Current Products, and click Accounting)
- Set up product categories window (from Orders, select Set up tables > Product categories)
- Inventory System Setup window (from Orders, select Set up module, and click Inventory)

Standard inventory

The following table summarizes the account hierarchy iMIS uses for Standard Inventory. Order of significance is indicated numerically, the lower the number, the greater the significance.

Inventory	1	2	3
Adjustments	1	2	3

Multiple warehouses

The following table summarizes the account hierarchy iMIS uses for Multiple Warehouses. Order of significance is indicated numerically, the lower the number, the greater the significance.

Inventory	1	2	3	4
Adjustments	1	2	3	4

Understanding multiple entities and orders

When Multiple Entities is enabled on the AR/Cash Set up module window, Orders supports multiple entities at the product level. Entities are individual organizations, and iMIS can separate and process transactions for multiple entities (and multiple sets of books) even if the entities share a common customer database.

When an organization has multiple accounting entities, such as different subsidiaries and foundations, revenue from the sale of specific products often needs to be allocated to specific entities. You can define entity owners for individual products. These product-level entities then are assigned to orders, order transactions, and product-specific transactions processed through the Orders module.

Individual entities are defined in the Org Codes field on the Organization Names window (select File > System Setup, and click Organization Names).

Summary of product-level entities

- A specific hierarchy determines each product's owner entity.
- The Batch cash entity is applicable only as the cash entry owner and is not assigned as the owner entity of order or income transactions.

- The entity associated with an order's first product determines the overall owner entity of the order.
- Product-level entities are assigned to product-related accounting transactions such as income transactions, cost of goods sold transactions, and inventory transfer and adjusting entries.
- The overall order entity is assigned to invoice summary transaction lines, such as entries for Accounts Receivable and miscellaneous charges.
- Due To/Due From entries generate when an order for multiple products with differing entities is invoiced, regardless of whether the order is prepaid.
- Due To/Due From entries generate when invoicing a prepaid order for which the cash entity differs from the overall order's entity.

Determining a product's owner entity

The following hierarchy determines the entity assigned to a product and the transactions related to that product:

Multiple Entities (enabled)

- If an Entity is assigned to the product, then the entity assigned to the product-related transaction line equals the product's Entity.
- If an Entity is not assigned to the product, then the entity assigned to the product-related transaction line equals the default Orders entity assigned on the AR/Cash Set up module window.
- If the default Orders entity is not assigned, then the entity assigned to the product-related transaction line equals the default system entity (Org Code) defined on the Organization Names window.

Multiple Entities (disabled)

The entity assigned to the product-related transaction line equals the default system entity (Org Code) defined on the Organization Names window.

Assigning entities to standard orders

When a standard order is created, iMIS sets the order's overall entity equal to the entity of the first product entered in the order. Because entering a comment-only line without a product code is possible, the first line item containing a product code represents an order's first product.

This overall order's entity is referenced when processing standard orders for the following purposes:

- The order's entity determines which entity's organization name and address print on invoices when the PRINT_MULTI_ENTITY option is enabled on the Detail Report Parameters window.
- The order's entity is passed on as the overall order entity to any backorders generated after partial order fulfillment (even if the first order line has been fulfilled and is not included in the backorder).
- The order's entity is assigned as the entity to the Accounts Receivable entry when a non-prepaid (or partially prepaid) order is invoiced.
- The order's entity is assigned as the owner of the Invoice line that is created when the invoicing transaction is generated and/or its batch is posted.
- The order's entity is assigned as the entity to various miscellaneous charges connected to the invoiced order, including freight, handling, and tax.
- For a prepaid order for which the cash entity differs from the overall order's entity, the order's entity plays the role of the “Owner Entity,” resulting in a debit equal to the pre-payment to the Due From inter-company receivable account.
- When an order for multiple products with differing entities is invoiced, the order's entity takes on the liability role (similar to that of the “Cash Entity”), incurring an inter-company liability for the income amount of each secondary product that is assigned a different entity.

Assigning entities to credit memo orders and debit memo orders

The following are the rules for assigning entities to credit memo orders and debit memo orders:

- If a credit memo or debit memo order has a linked invoice number (the Invoice # field is populated on the Overview tab of the Enter and edit orders window), the order's entity always equals the entity of the original order's invoice.

  For example, A is the original order's entity, and B is the entity of the credit memo's first product line. If you populate the Invoice # field with the original order's Invoice number, the credit memo's entity will still be A (the entity of the original invoice) even though B is the entity of the first product line.

- If the order does not have a linked invoice number, the order's entity calculates according to the hierarchy defined in Assigning Entities to Standard Orders.

  As in the previous example, where B is the entity of the credit memo's first product line, the credit memo's entity will still be B.

Assigning entities during transaction generation

If Multiple Entities is enabled on the AR/Cash Set up module window, the product entity is used when generating the following accounting transactions:

- Income transactions generated by the order invoicing process
- Cost of Goods Sold and Inventory reduction transactions generated by the order invoicing process (if Generate Cost of Goods Sold is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory))
- Income adjusting transactions generated by processing credit and debit memo orders
- Inventory transfer and adjusting transactions generated by recording inventory transfers and quantity adjustments

The overall order's entity is used when generating the following accounting transactions:

- Accounts Receivable entries when non-prepaid (or partially prepaid) orders are invoiced
- Miscellaneous charge entries connected to the invoiced order, including freight, handling, and tax charges

Due To/Due From scenarios

In the following scenarios, a Due To/Due From adjusting transaction may be created automatically when an order is invoiced:

- An invoiced order contains multiple product lines with multiple entity owners

  Since an overall order or invoice must have a single entity owner, the entity owner of the first line item is designated as the order's overall owner. In this scenario, a Due To/Due From adjusting transaction generates between the main order's owner and the secondary product's owner entity.

- A prepaid order's payment is deposited to a cash account owned by an entity other than the order's overall entity

  In this scenario, a Due To/Due From adjusting transaction generates between the cash entity owner and the overall order's entity owner.

Examples of Due To/Due From scenarios

The following examples outline several Due To/Due From scenarios for entities A, B, and C. For simplicity, each entity's alphabetic designation indicates the entity's corresponding GL account numbers.

The GL accounts used in the examples are as follows:

Cash	A-1100	B-1100	C-1100
Accounts Receivable	A-1200	B-1200	C-1200
Inventory	A-1300	B-1300	C-1300
Income	A-4000	B-4000	C-4000
Cost of Goods Sold	A-5200	B-5200	C-5200

The inter-company Due To/Due From accounts are as follows:

Due From Entity A	N/A	B-1501	C-1501
Due From Entity B	A-1502	N/A	C-1502
Due From Entity C	A-1503	B-1503	N/A
Due To Entity A	N/A	B-2501	C-2501
Due To Entity B	A-2502	N/A	C-2502
Due To Entity C	A-2503	B-2503	N/A

The products and their entities are as follows:

- Product A - Unit Price of 50.00, assigned to Entity A
- Product B - Unit Price of 100.00, assigned to Entity B

Example 1

Non-prepaid order for Product A and Product B - The invoice sales transaction is as follows:

A-1200 - Accounts Receivable (Entity A)	150.00	
A-4000 - Product A Sales (Entity A)		50.00
B-4000 - Product B Sales (Entity B)		100.00

Because Entity A (assigned to the first line item, Product A) receives the full debit to Accounts Receivable, Entity A incurs an inter-company liability to Entity B, which receives a credit to Income of 100.00. This sales transaction generates the following Due To/Due From entry:

B-1501 - Due From Entity A (Entity B)	100.00	
A-2502 - Due To Entity B (Entity A)		100.00

Example 2

Prepaid order for Product A for which the funds are deposited into Entity C's bank account - If the payment is processed and recorded when the order is shipped, the invoice sales transaction is as follows:

C-1100 - Cash (Entity C)	50.00	
A-4000 - Product A Sales (Entity A)		50.00

In this example, Entity A receives a credit to Income of 50.00 for the sale of Product A, while Entity C receives the debit to Cash. The inter-company Due To/Due From balancing transaction that results is as follows:

A-1503 - Due From Entity C (Entity A)	50.00	
C-2501 - Due To Entity A (Entity C)		50.00

Example 3

(This example combines the scenarios for Examples 1 and 2)

Prepaid order for Product A and Product B for which the funds are deposited into Entity C's bank account - If the payment is processed and recorded when the order is shipped, the invoice sales transaction is as follows:

C-1100 - Cash (Entity C)	150.00	
A-4000 - Product A Sales (Entity A)		50.00
B-4000 - Product B Sales (Entity B)		100.00

The Due To/Due From transaction generated from this example is similar to a combination of the two inter-company transactions generated in the earlier examples:

A-1503 - Due From Entity C (Entity A)	150.00	
A-2502 - Due To Entity B (Entity A)		100.00
C-2501 - Due To Entity A (Entity C)		150.00

Orders

Orders Overview

Orders expands on the simple order entry functionality found in AR/Cash. Orders provides you with an established and integrated tool for recording, processing, and tracking your organization's product orders. In addition to order processing, you have unprecedented control in managing your organization's products and kits, product inventory, backorders, and accounting information.

Orders allows you to perform the following tasks effectively and efficiently:

- Enter, edit, and process orders
- Find and track orders
- Define products and product prices
- Designate Upsell, Cross-sell, and Replacement items for products
- Assign entities and status codes to individual products
- Manage product inventory for either standard inventory or multiple warehouses
- Manage backorders
- Generate specific inquiries and reports
- Define order types, product categories, and tax codes
- Calculate freight charges by weight, value, and quantity
- Define default shipping methods for individual countries
- Define and configure the setup options used for customizing Orders
- Import orders from external sources
- Enable, apply, and use VAT and Canadian taxation
- Access accounting information

iMIS Orders system capabilities

iMIS Orders is easy to use and integrates with the other iMIS features, allowing you to maintain and save all of your organizational information in one database. As with all iMIS features, standard lookup is available for important fields, such as customer IDs, product codes, and tax authorities.

Order entry and processing features

iMIS Orders provides for all aspects of order processing:

- Entering and modifying data
- Ordering replacements for out-of-stock items
- Adding Upsell and Cross-sell items to orders
- Ordering products from multiple warehouses
- Canceling orders
- Conducting pre- and post-inventory inquiries
- Entering credit and debit memos
- Applying flexible pricing and both customer and product discounts
- Applying freight and handling charges
- Calculating taxes automatically, including provisions for VAT and Canadian taxes
- Processing both full and partial payments by cash, check, and credit card
- Customizing and determining the processing flow of orders through your system:
- Some orders may require generating packing slips and shipping papers
- Some orders may require only invoices

Inventory control features

iMIS Orders adds key inventory control features in several areas:

- Full Inventory Status and Reporting
- Perpetual inventory
- Reorder reports
- Inventory storage in single and multiple warehouse locations
- Receiving functions, inventory adjustments, warehouse transfers, and reporting
- Inventory Costs and Valuations - Provides two options for valuing your inventory and determining costs:
- Weighted average
- Standard cost
- Backorder Processing
- Includes an option to generate and track backorders when only partial or no shipments are available because of insufficient inventory
- Includes an option to release backorders manually or automatically when shipments arrive

Order inquiry and reporting

iMIS Orders features many built-in display and reporting capabilities:

- Shipping labels can be printed for orders having a SHIPMENT status
- Order Status reports display summaries and details of all open orders within the system
- Product reports listing orders by product, product inventory, product prices, and product sales are available
- Posted and un-posted transactions can be printed by date

Orders system integration

Orders integrates completely with the other iMIS modules:

- Customer Management
- The database maintained in Customer also serves as the database for Orders

- Individual customer activity records are created for each detailed line item, simplifying future system reporting and analysis
- Accounts Receivable and Cash Receipts
- Automatically processes, tracks, and generates accounting entries, including sales, accounts receivables, and cash receipts, when an order is entered
- Tracks and records balances owed
- Generates invoices
- General Ledger Interface

  Transactions are passed to your General Ledger package if you are licensed for the General Ledger Interface.

Benefits of order processing

The iMIS Orders feature offers many benefits when processing orders.

Cash prepayments

Cash and check prepayments are recorded immediately at order entry. These prepayments offset a prepaid order's unearned or deferred income account. Credit card prepayments, however, may or may not be recognized as prepaid cash.

If you do not enable the Recognize Credit Card Order Payments as Prepaid Cash option on the AR/Cash Set up module window (from AR/Cash, select Set up module), credit card payments are not recorded until an order is invoiced.

When you ship and generate an invoice for a prepaid order, the prepaid order entry is reversed, and the income is recognized.

Product-level entities

When Multiple Entities is enabled on the AR/Cash Set up module window, you can define an owner entity for an individual product. These product-level entities then are assigned to orders, order transactions, and product-specific transactions processed through the Orders module.

Entities are individual organizations, and iMIS can separate and process transactions for multiple entities (and multiple sets of books) even if the entities share a common customer database. Organizations having multiple accounting entities, such as different subsidiaries or foundations, then can allocate revenue to specific entities.

Upsell, cross-sell, and replacement items

When customers order products, additional items often are available that can replace, that complement, or that are superior to the products ordered initially. However, customers sometimes miss these purchasing opportunities because they are unaware that additional items are available.

With Orders, you can designate upsell, cross-sell, and replacement items for products that are readily accessible and available during order entry.

Special pricing

Special pricing allows you to set up product quantity discounts. These discounts are based on customer type and establish price breaks for a predefined number of products. For example, a single product may sell for $25, but you may drop the price to $20 if the customer purchases 10 or more items. This is similar to calculating sliding-scale rates in iMIS Billing.

You can set up special pricing for each of your products. The special pricing rules and formulas you define for your products determine a product's special price and override the product's default price. Define product special pricing on the Special Pricing window (from Orders, select Manage inventory > Manage products, select a current product, and click Pricing).

Automatic handling calculation

When the Automatic Calculation of Handling Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges), iMIS automatically computes handling charges when you enter an order.

Handling charges are calculated automatically for each order based on a number of variables, such as the percentage of the total amount shipped, the percentage of freight, and

the minimum order. The option also allows you to exclude specific order types from the automatic handling calculation. You can override the automatic handling calculation at order entry.

Automatic freight calculation

When the Automatic Calculation of Freight Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges), iMIS automatically computes freight charges when you enter an order.

Freight charges compute each time an order is totaled based upon the calculation method enabled on the Add-on Charges window:

- Freight by Weight
- Freight by Total Value Ordered
- Freight by Total Quantity Ordered

You can override automatic freight calculation at order entry.

> **Note:** Note: Automatic calculation of Freight charges applies to all web views of iMIS.

Inventory valuation

Two methods exist for valuing your inventory: Average and Standard.

The Average inventory valuation method calculates the cost of goods sold as averaged over time. A product's average unit cost and average total inventory cost are recalculated each time you post inventory receipts, adjustments, and transfers. The average cost of an invoiced product is used when recalculating average unit and average total inventory costs.

The Standard inventory valuation method is calculated based on a fixed amount. This method gives you the ability to factor in a fixed amount for adding overhead costs to your calculation.

Order processing terms

The following terms are used frequently in iMIS Orders.

Available

Product quantity on hand less the product quantity reserved.

Backorder

Indicates that insufficient inventory is available to fill an order. Orders that cannot be filled are held in a backorder status until inventory is received.

Bin

Specific location within a warehouse where a product is stored.

Committed

Actual number of products committed to fill open orders or the number of products in inventory that are awaiting shipping. Committed products do not include backorders.

Cross-sell

To persuade a customer to purchase one or more similar items that complement the product initially chosen.

Entity

Individual organization that may have multiple subsidiaries or foundations (and multiple sets of books).

Kit

Group of products sold as an individual item.

Multi-Warehouses

Option that allows you to record and store a stock item's inventory in several different warehouse locations.

On Order

Quantity of a product on order from a vendor or supplier.

Order

Request to purchase products.

Order Processing Stages

Steps orders must go through until the orders are complete. The number and type of order processing stages an order goes through depends on the order type. Different order types require different order processing stages. Examples of order processing stages include Convert quotes, Print shipping papers, Ship orders, and Invoice orders.

Order Types

Determine how orders are processed. All orders are entered as a specific order type.

Product

Item or service that your organization offers for sale to its customers.

Product Adjustments

Include inventory adjustments due to breakage, pilferage, giveaways, or physical inventory count differences.

Product Receipts

Record products received in inventory.

Product Transfers

Transfer a product's inventory from warehouse to warehouse.

Quantity on Hand

Specifies how many products are currently in stock. These are products that have been received but not shipped.

Replace

To substitute an item for the product that was initially chosen.

Reserved

Indicates how many products are in open order status. Reserved orders include both shippable and backordered items.

Stock Item

Product that physically is stocked in inventory.

Upsell

To persuade a customer to purchase a product that may have a greater value than the product initially chosen.

Warehouse

Facility where stock items are stored in inventory. Stock items can be stored in multiple warehouses.

Navigation for Orders

The Orders task list consists of seven items that launch your Orders windows: Enter and edit orders, Process orders, Manage inventory, Generate reports, Set up tables, Set up warehouses, and Set up module.

Enter and edit orders

Opens the Enter and edit orders window used for entering and editing customer orders. This window utilizes the Portfolio concept and is organized into the following tabs:

- Overview - (Default tab) Use this tab to enter and edit product orders.
- Order Details - Use this tab to add and edit specific order information such as hold codes, commission rates, order notes, and shipping and handling information.
- Ship to Info - Use this tab to enter and edit an order's 'Ship to' information. The Ship to Info tab allows you to edit a customer's name and address information for a single order, or you can enter the 'Ship to' customer's information if the order is being shipped to someone other than the 'Bill to' customer.
- Payments - Use this tab to enter an order's payment information.

- Account Info - (read only) This tab allows you to view an order's specific accounting information.

  Process orders

  Opens a sub-menu of tasks used for processing orders. Order processing is a series of logical stages that move an order through the system from order entry to order invoicing. Different order types require processing through different stages, and the processing stages allow you to keep track of an order and its status. Each processing stage lists the orders that are at that stage in the order lifecycle.

- Print quotes - Select to open the Print quotes window used for generating printed copies of selected sales quotes.
- Convert quotes - Select to open the Convert quotes window used for converting pro forma orders to the default standard order type.
- Print pick list - Select to open the Print pick list window used for generating itemized product lists.
- Print shipping papers - Select to open the Print shipping papers window used for generating shipping papers (Packing Slip) for selected orders.
- Ship orders - Select to open the Ship orders window used for recording shipping dates, shipping methods, and shipped quantities.
- Invoice orders - Select to open the Invoice orders window used for posting selected product sales transactions to AR/Cash.
- Close orders - Select to open the Close orders window used for marking completed orders as closed.
- Manually release backorders - Select to open the Manually release backorders window used for reversing an order's backorder status and returning the order to the appropriate order processing stage.

  Manage inventory

Opens a sub-menu of tasks used for inventory control functions. These functions represent the progression of inventory tasks, which include setting up product inventory and managing and posting inventory receipts, adjustments, and transfers.

- Manage products - Select to open the Manage products window used for defining products and product information, such as product codes, descriptions, pricing, and accounting information. The Manage products window displays current inventory information by product.
- Enter and edit receipts and adjustments - Select to open the Enter and edit receipts and adjustments window used for entering product inventory receipts, adjustments, and transfers.
- Post receipts - Select to open the Post receipts window used for posting product receipts, adjustments, and transfers.

Generate reports

Opens the Generate reports window used for generating order inquiries, standard reports, and internal reports, such as order status, order transaction postings, and lists and details of your product inventory. The printed materials that you send to customers, such as price quotes, shipping papers, and invoices, are generated either through the Process orders sub-task list or from the Print button on the Overview tab when an order is open on the tab.

IQA

Opens IQA in advanced mode and enables you to run predefined Intelligent Query Architect (IQA) queries on orders.

Set up tables

Opens a sub-menu of tasks for configuring and maintaining the tables used by the Orders module.

- Order types - Select to open the Set up order types window used for defining order types.
- Product categories - Select to open the Set up product categories window used for defining product categories.
- Tax codes - Select to open the Set up tax codes window used for defining tax codes.
- Freight by weight - Select to open the Set up freight by weight window used for defining shipping rates according to order weight and shipping zone.
- Freight by total value - Select to open the Set up freight by total value window used for defining shipping rates according to order value.
- Freight by total quantity - Select to open the Set up freight by total quantity window used for defining shipping rates according to order quantity.
- Zones - Select to open the Set up zones window used for defining the shipping zones for each country's shipping methods.

  Set up warehouses

  (visible only if multi-warehouses are enabled) - Opens the Set up warehouses window used for defining warehouse locations and descriptions.

  Set up module

  Opens the Set up module window used for configuring the behavior of the Orders module.
- Order Status Defaults window - Click Order Staging on the Set up module window.
- Add-on Charges window - Click Add-on Charges on the Set up module window.
- Backorder Processing window - Click Backorders on the Set up module window.
- Inventory System Setup window - Click Inventory on the Set up module window.
- Web Order Options window - Click Web on the Set up module window.

Order Entry

The iMIS Orders feature utilizes the Portfolio concept, which organizes the windows used for entering orders into a series of tabs. The efficient tab design influences user workflow and simplifies the process of entering and managing customer orders.

Entering product orders is a simple process that you can perform by entering a minimum amount of data in the following four fields:

- Order Type
- Bill to ID
- Product code
- Order Quantity

However, iMIS Orders provides the capability and flexibility to enter and manage much more complex orders. If you are entering an order for a new customer, Orders allows you to add the customer to your organization's file when entering their order.

As long as an order has not been invoiced, you have the ability to edit an order's information such as the type and number of products ordered, the 'Ship to' information, and any applicable add-on charges and prepayments. For orders that already have been invoiced, you have the ability to enter credit and debit memo orders.

Entering orders

This section documents the steps for entering a basic order. The following sections of this chapter document the procedures for entering detailed and specific order information.

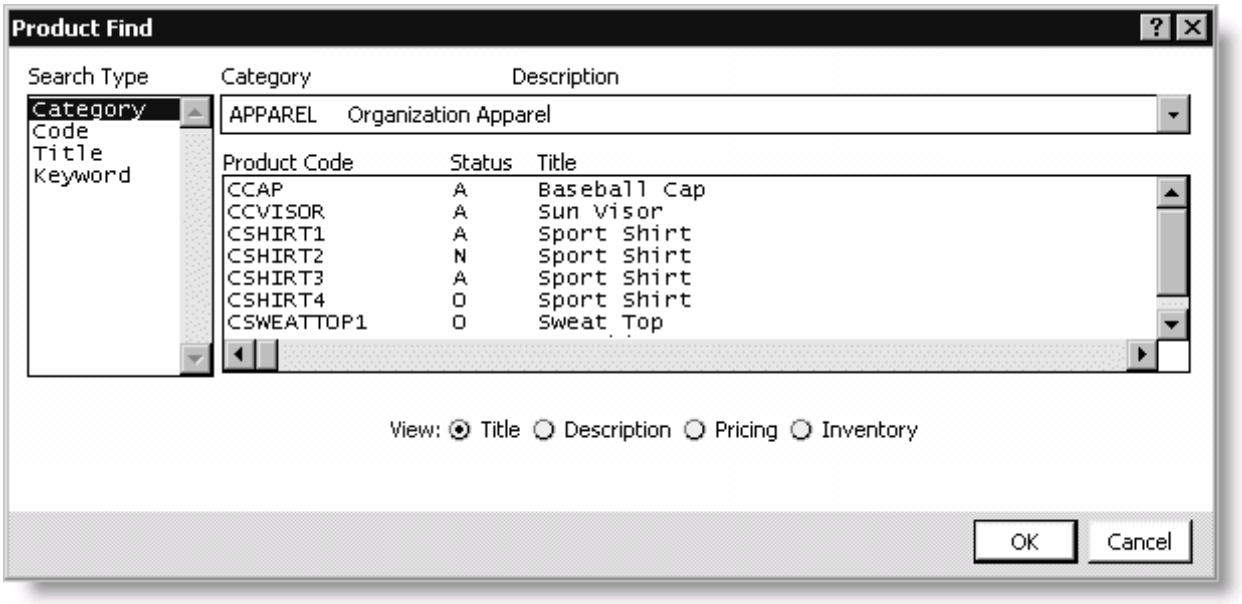
Orders are entered on the Enter and edit orders window. Organized into a series of tabs, this window provides a useful and intuitive format for efficiently entering your customers' product orders.

Searching for products

When entering orders, the Product Find window is a useful tool when searching for specific products and product codes. Accessed through the Product field's Find icon, the

Product Find window allows you to search for products by product category, product code, product title, and keyword.

Product Find window



From Orders, select Enter and edit orders, enter or edit an order, and select the Product field's Find icon

Search Type

Select from the list of iMIS-specified search types: Category, Code, Title, and Keyword. The Product Find window's format is dependent on which Search Type is selected:

- Category - Select to search by product category. The Category drop-down list displays above the Product Code drop-down list when the Category search type is selected.
- Code - Select to search by product code.
- Title - Select to search by product title.
- Keyword - Select to search by keyword in the product title and/or description. The Title and Description options and the Search For field display at the bottom of the Product Find window when the Keyword search type is selected.

Category

(Displays when the Category search type is selected) Select from a list of product categories. Both the Category code and Description display for each defined product category.

Product Code

Select from a list of products. This field always displays a product's Product Code. The other product data that displays is dependent on the search type selected and the View option enabled.

Status

Displays a product's status code.

View

- Title - (default) Displays a product's title in the Product Code field.
- Description - Displays a product's description in the Product Code field.
- Pricing - Displays a product's pricing information in the Product Code field. Both Regular and Non-Member pricing appear.
- Inventory - Displays a product's inventory information in the Product Code field. A product's On Hand, Reserved, Commttd, Avail, and On Order quantity appears.

Title

(Not shown in example, displays when the Keyword search type is selected) Enables keyword searching on a product's title.

Description

(Not shown in example, displays when the Keyword search type is selected) Enables keyword searching on a product's description.

Search For

(Not shown in example, displays when the Keyword search type is selected) Enter the keyword for which you want to search.

Enter and edit orders window - Full Order Entry

The Enter and edit orders window enables you to enter sales orders, and to record payment, shipping, and account info. It has five tabs that separate order information:

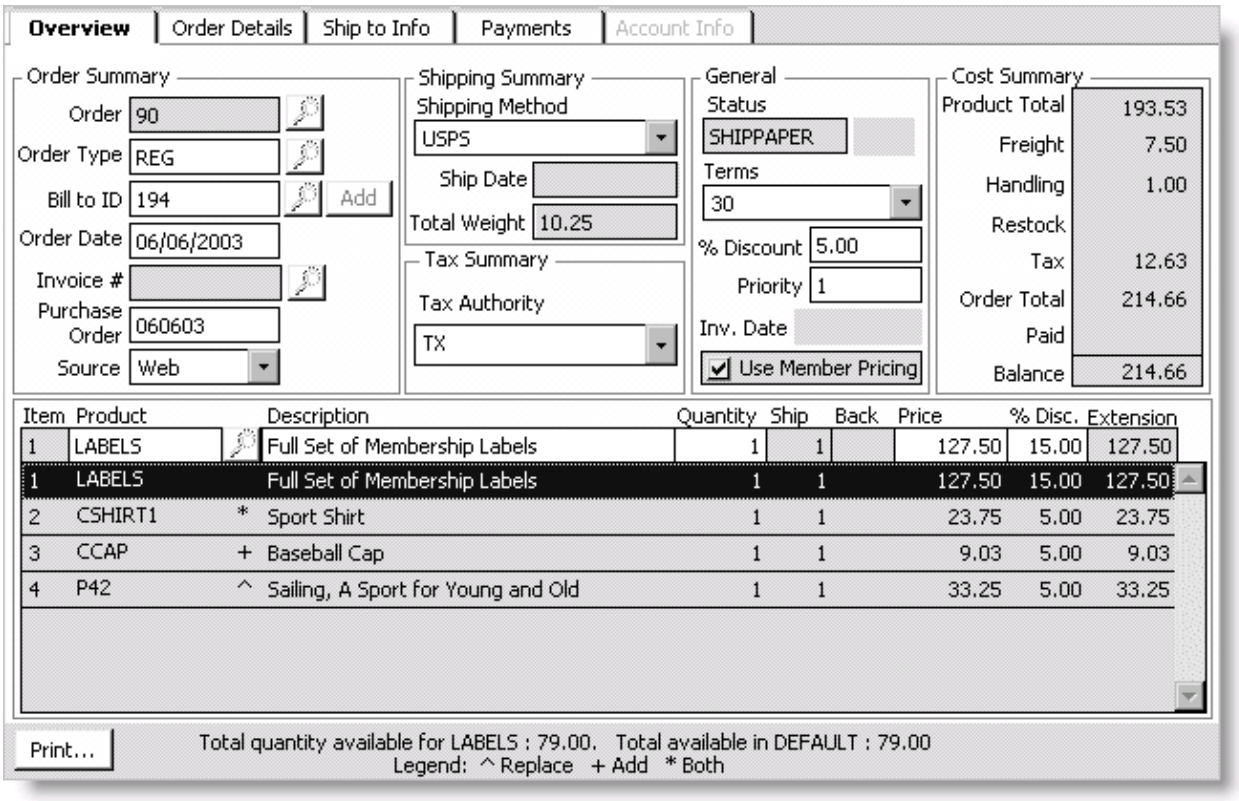
- Overview -(Default tab) Select to enter, edit, and view a customer's general order information.
- Order Details -Select to enter, edit, and view a customer's specific order information such as hold codes, order notes, shipping, and handling information.
- Ship to Info -Select to enter, edit, and view the 'Ship to' customer's name, address, and phone information.
- Payments tab -Select to enter, edit, and view an order's payment information.
- Account Info -(read only) Select to view an order's specific accounting information. The Account Info tab is disabled for orders that have not been invoiced.

Print opens the Select Report window used for generating specific reports such as Order Detail, Quotation, Pick List, Packing Slip, and Invoice. For Full Order Entry orders (order type Full) you can also use the Print button to convert the current order to the next processing stage.

Enter and edit orders window - Overview tab

Changed note in %Discount (mcr) Worked more on note in % Discount for DT_1102. (amg)

The Overview tab appears when you select Orders > Enter and edit orders.



Order Summary

- Order - This field remains blank until you enter an order. After you enter an order, iMIS automatically generates a sequential number for the order. When searching for an existing order, use the Order field to enter the order number for which you are searching. Select the Order field's Find icon to look up an order number.
- Order Type - (Defaults to the last order type used) Enter an order type defined on the Set up order types window (from Orders, select Set up tables > Order types). Select the Find icon to look up an order type.
- Bill to ID - Enter the ID of the customer to be billed for an order. Select the Find icon to look up an ID.
- Add button - Opens the Add New Customer window. The Add New Customer window allows you to add new customers to your organization's database when entering orders.
- Order Date - The system automatically enters the current system date for the Order Date. You can override this date by entering a new value. If you are using batch control, the

Order Date field defaults to the active batch date; you can override the batch date if the order date is different.

- Invoice # - For all orders except credit and debit memo orders, this field remains blank until you invoice an order. Once you invoice an order, iMIS automatically generates a sequential invoice number that displays in the field.
- When searching for an invoiced order, enter the invoiced order's invoice number in the Invoice # field. Select the Find icon to look up an invoice number.
- When entering a credit or debit memo order for an invoiced order, enter the invoiced order's invoice number in the Invoice # field.
- Purchase Order - Enter a purchase order number or other reference number. Purchase order numbers display on order invoices.
- Source - Select a source code from the drop-down list, such as WEB, MAIL, or PHONE; source codes are defined on the SOURCE_CODE general lookup/validation table (from Customers, select Set up tables > General lookup/validation). Source codes are required when entering orders if the Force Source Coding option is enabled on the Customer Setup - Basic Options window (from Customers, select Set up module> General, and click Basic Options).

Shipping Summary

- Shipping Method - Select a shipping method for the order from the drop-down list; shipping methods are defined on the SHIP_METHOD general lookup/validation table (from Customers, select Set up tables > General lookup/validation). If you do not select a shipping method, the Shipping Method list defaults to the Default Shipping Method defined on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).
- Ship Date - (read only) Displays the system date an order is processed through the Ship orders processing stage. If an order type does not process through the Ship orders processing stage, the ship date defaults to the invoice date.
- Total Weight - (read only) Displays an order's total shipping weight.

Tax Summary

- Tax Authority - Select a tax authority for the order from the drop-down list; tax authorities and their corresponding tax codes are defined on the Set up tax codes window (from Orders, select Set up tables > Tax codes). If a state code has been defined for the 'Ship to' customer's address, the Tax Authority defaults to the 'Ship to' customer's state code.
- VAT Summary - (Not shown in example, displays only if you are licensed for VAT) The VAT Summary area summarizes a customer's VAT information:
- Reg Number - (Not shown in example, display/VAT only) Displays a customer's VAT registration number.
- Country - (Not shown in example, display/VAT only) Displays a customer's VAT member country.

  Note: You can enable the Canadian Taxation (see "Canadian Taxation (GST and HST)") or the Value-Added Tax (VAT) (see "European Taxation (VAT)") method.

  General
- Status - (read only) Displays an order's current status. An order's status changes as the order is converted from one processing stage to another.
- Hold - (read only) Indicates an order has been placed on hold. Orders are placed on hold by selecting a Hold Code on the Order Details tab. Placing an order on hold prevents the order from displaying on the order processing windows. When you remove an order's Hold Code, the order is released to go through the appropriate order processing stages.
- Terms - Select a payment term that applies to an order, such as 30, 60, or 90 days; payment terms are defined on the Set up terms window (from AR/Cash, select Set up tables > Terms). The selected term prints on an order's invoice. If you entered a Default Terms Code on the AR/Cash Aging window (from AR/Cash, select Set up module, and click Aging), the code displays by default on each new sales order.
- % Discount - (optional) Enter a percentage discount (0 to 100) to apply to an order's price. For example, entering 25 in the % Discount field reduces a $400 order by 25 percent, or

$100, to $300. A discount entered in the % Discount field applies to all of the products ordered. However, if a product's price is changed after applying an order-level discount, the discount does not extend to the product line-item's new price. In addition, individual product line-item discounts override order-level discounts.

Changing the order-level % Discount changes all line-item discounts if they matched the order-level % Discount prior to the change.

Exception: If the product price has been overridden and the % Disc had been reset to zero, that line item does not change. The Price remains overridden and the % Disc remains set to zero.

- Priority - (optional) Specify the priority that will be assigned to any backordered portion of an order. For example, a “1” has the highest priority. A backorder with a higher priority will be processed before a backorder with a lower priority.
- Inv Date - (Display/Invoiced orders only) Displays an order's invoice date.
- Use Member Pricing - (Displays only for non-member customers) Enable to charge member prices for products ordered by non-member customers. The Use Member Pricing option displays only for non-member customers under the following conditions:
- The Is a Member option is not enabled for the customer's type on the Set up customer types window.
- The Is a Member option is enabled for the customer's type on the Set up customer types window, but the customer's status is D, S, or I.

  If Use Parent Company Pricing is enabled on the Customer Setup - Advanced window (from Customers, select Set up module > General, and click Advanced), the Use Member Pricing option displays under these conditions:

- The Is a Member option is not enabled for the parent company's customer type on the Set up customer types window.
- The Is a Member option is enabled for the parent company's customer type on the Set up customer types window, but the company's status is D, S, or I.

Cost Summary (read only)

> **Note:** VAT Tip: To see how VAT taxes apply to the prices you see in the Cost Summary pane, press the Ctrl key as you click on various charges. The pop-up shows what iMIS is calculating the applicable VAT to be.

- Product Total - Displays an order's total product cost excluding any applicable add-on charges such as freight, handling, and taxes.
- Freight - Displays an order's applicable freight charge.
- Handling - Displays an order's applicable handling charge.
- Restock - Displays an order's applicable restocking charge.
- Tax - Displays an order's applicable sales tax.
- Order Total - Displays an order's total cost.
- Paid - Displays any amount paid on an order.
- Balance - Displays any outstanding payment balance for an order.

Product Line Items

- Item - (read only) Displays a product's line number on an order. Item numbers are system generated as products are added to orders.
- Product - Enter a product code for an order. Select the Find icon to open the Product Find window and look up a product; products are defined on the Manage products window (from Orders, select Manage inventory > Manage products).
- Description - Displays the product description defined in the Title field on the Manage products window. The text in the Description field is editable. If you leave the Product code field empty, you can enter printable comments in the Description field.
- Quantity - Specify the number of individual products ordered. Enter quantities as whole numbers unless you are designating partial quantities. If you are designating partial quantities, enter fractions as decimals, such as “1.5.” If you are entering a credit memo order,

enter a negative value, such as “-2.” When you invoice a customer's order, an activity record is created for the customer. The quantity of each individual product ordered populates the Activity.QUANTITY field when an activity record is created.

- Ship - (read only) Displays the number of products ordered that are available to ship at the time of order entry. If you are entering a credit memo, the Ship field displays a negative value, indicating the number of products being returned.
- Back - (read only) Displays the number of products ordered that are on backorder at the time of order entry.
- Price - Enter a product's price. The Price field defaults to the value defined for a product on the Manage products window, but it can be overridden at order entry. If a price has not been defined for a product, you can enter a price at order entry. If a discount has been applied at either the product or the order level, the Price field reflects the discount. Overriding a product's price after a product line-item discount has been applied resets the product line-item discount to zero. In addition, if a product's price is changed after applying an order-level discount, the discount will not extend to the product line-item's new price.
- % Disc - (optional) Enter a percentage discount (0 to 100) that will be applied to a product's price. For example, entering 10 in the % Disc field reduces a $100 product's price by 10 percent, or $10, to $90.

  Product line-item discounts entered in the % Disc field override order-level discounts for product line-items. If an order-level discount has been applied to an order, the discount percentage displays in the % Disc field until it is overridden with a product line-item discount. The discount entered in the % Disc field applies only to a product line-item; product line-item discounts do not affect an entire order. Overriding a product's price after a product line-item discount has been applied resets the product line-item discount to zero.

  If someone previously modified the unit price by entering price manually, iMIS calculates the newly discounted price for the line item as line-item % Disc multiplied by the previously entered manual price.

If the unit price has not been modified, iMIS calculates the newly discounted price as line-item % Disc multiplied by the original price at the value that the price was originally set, regardless of member pricing or other special pricing.

- Extension - (read only) Displays a product line-item's total price. A product's Extension price is determined by multiplying the value in the Quantity field by a product's unit Price. If a price discount has been applied at either the product or the order level, the Extension field reflects the discount. If you are entering a credit memo order, the Extension price reflects a negative value since products are being returned.
- Total quantity available - (read only) Displays a product's total number of units in inventory. To display the Total quantity available field, select a product line-item.

  If the Enable Multi-Warehouses option is enabled on the Inventory System Setup window, the Total quantity available field displays a product's total number of units in inventory across all warehouses.
- Total available - (Display/Multi-Warehouses only) Displays a product's total number of units in inventory at a selected warehouse. To display the Total available field, select a product line-item.
- Opportunities Legend - (read only) Displays as long as one of the order's line items has unrealized opportunities. Each line item that has unrealized opportunities is indicated by one of the following characters displaying next to the Product code:

  '+' - Indicates an item has cross-sell opportunities

  '^' - Indicates an item has upsell opportunities

  '*' - Indicates an item has both upsell and cross-sell opportunities

  Display of VAT tax code and amount for each line

  The VAT tax code and VAT tax amount for a line item subject to VAT taxation now display at the bottom of the Orders portfolio when the line item is being entered, edited, or is selected.

Preventing duplicate product line-items

When entering orders, be careful not to duplicate product line-items. Available quantities are not updated until an order is saved, and entering duplicate product line-items can result in backorders not generating when insufficient inventory exists to fill an order. For example, if an order contains a product kit as well as one of the kit components, the order will be processed, but the inventory count will be inaccurate. This can result in a backorder not generating.

If Multi-Warehouses is disabled, backorders will generate only for a product's first line-item if insufficient inventory exists to fill an order. For example, Product X has 10 units in stock, and a line-item is entered for 10 units of Product X. If a second line-item is entered for additional units of Product X, regardless of the number of units, a backorder will not generate for the second line-item.

If Multi-Warehouses is enabled, and duplicate line-items are entered for a product ordered from the same warehouse, backorders will generate only for the first product line-item ordered from the warehouse. For example, Product X has 10 units in the Default warehouse and 5 units in the East warehouse. If a line-item is entered for 10 units of Product X at the Default warehouse, and a second line-item is entered for another 10 units of Product X at the Default warehouse, a backorder will not generate for the second line-item. However, if the second line-item was entered for 10 units of Product X at the East warehouse, a backorder will generate for the second line-item.

To enter an order

Follow this procedure to enter a basic order.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click New.
3. Enter the Order Summary information:

- Enter an Order Type (select the Find icon to look up an order type).
- Enter a Bill to ID (select the Find icon to look up an ID).

- (optional) Override the Order Date if necessary. The Order Date defaults to the batch date if batch control is used; otherwise, the date defaults to the system date.
- (optional) Enter a Purchase Order if applicable.
- Select an order Source code from the drop-down list.

4. (optional) Override the default Shipping Method if necessary.
5. (optional) Override the default Tax Authority if necessary.
6. Enter the General order information:

- (optional) Override the default payment Terms if necessary.
- (optional) Enter a percentage discount for the order in the % Discount field.
- (optional) Enter a backorder Priority for the order.

7. Enter the product line-item information:

- Enter a Product code (select the Find icon to open the Product Find window and look up a product), and press Tab. The Description field populates automatically.
- Enter the number of products ordered in the Quantity field.
- (optional) Edit the product Price if necessary.
- (optional) Enter a percentage discount for the product in the % Disc field. Entering a line-item discount in the % Disc field recalculates the price for that one product line regardless of any order-level discount entered in the % Discount field. Entering a line-item discount does not affect other line items or the order-level discount.

  Note: If you override a line-item unit price at any time, the new price is considered to be the price after discount. The assumption is that you are not using any discount percentage (% Discount or % Disc) and iMIS sets the % Disc field to zero for that line item.

  Note: Changing the line-item discount (% Disc) causes iMIS to recalculate the price.

1. If someone previously modified the unit price by entering a price manually, iMIS calculates the newly discounted price for the line item as line-item % Disc) multiplied by the

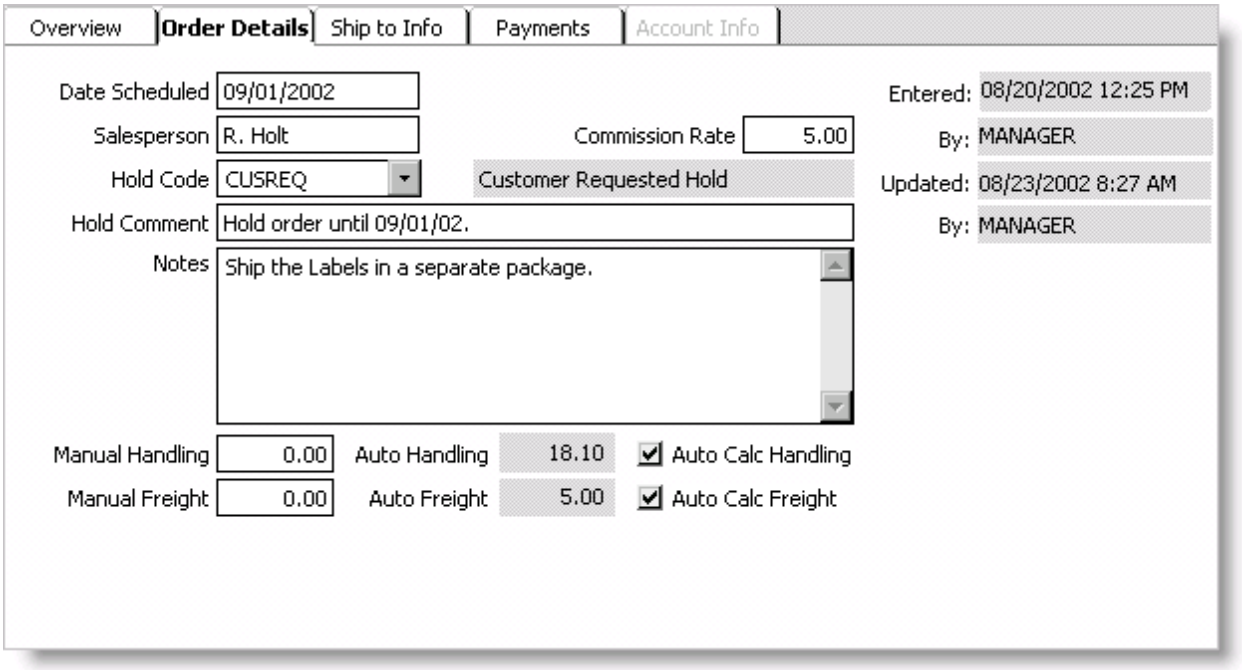
previously entered manual price. You can see a manual price by placing your mouse over the line in the order and looking for the price in the bottom left corner.

2. If the unit price has not been modified, iMIS calculates the newly discounted price as line-item % Disc) multiplied by the original price at the value that the price was originally set, regardless of member pricing or other special pricing.
3. Press Tab to add the product to the order. The product displays in the list of Product Line Items, and your cursor will be in the Product field.
4. Repeat this process for each additional product ordered.
5. Click Save to enter the order.

Entering order details information

The Order Details tab allows you to enter, edit, and record specific order information, such as scheduled shipping dates, salespeople, commission rates, order hold codes, notes, and freight and handling charges.

Enter and edit orders window - Order Details tab



From Orders, select Enter and edit orders, enter or open an order, and select the Order Details tab

Date Scheduled

Enter an order's scheduled delivery date. The date you enter is for information only and is not used for processing an order.

Salesperson

Enter the name of the salesperson who took the order. The name you enter is for information only and is not used for processing an order.

Commission Rate

Enter a salesperson's commission rate for an order. The commission rate you enter is for information only and is not used for processing an order.

Hold Code

Select an order hold code from the drop-down list; hold codes are defined on the HOLD_CODES general lookup/validation table.

A Hold Code prevents an order from being processed, and orders on hold do not display on processing windows. As an indication that an order has been placed on hold, Hold displays next to the Status field on the Overview tab. Once you remove an order's Hold Code, the order is released to its appropriate order processing stage and displays on the order processing window.

To view all orders on hold, run the Orders On Hold report from the Generate reports window (from Orders, select Generate reports, select Order Status, and select Orders On Hold).

Hold Code Description

(read only) Displays a description of the selected order hold code.

Hold Comment

Enter a comment about why an order is on hold.

Notes

Enter any additional comments about an order.

> **Note:** Note: Do not enter special characters (such as square brackets) in the Notes field. Entering special characters generates an error message and does not allow an order to be completed.

Manual Handling

Add a handling charge or override the automatic handling charges generated for an order. You must disable the Auto Calc Handling option to enter a manual handling charge.

Auto Handling

(read only) Displays an order's automatic handling charge when the Auto Calc Handling option is enabled. The amount that displays in the Auto Handling field is dependent on the parameters defined for the Automatic Calculation of Handling Charge option on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

You can override an automatic handling charge in the Manual Handling field once the Auto Calc Handling option is disabled.

Auto Calc Handling

This option enables automatically if the Automatic Calculation of Handling Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Disable the Auto Calc Handling option if you want to enter a manual handling charge in the Manual Handling field.

Manual Freight

Add a freight charge or override the automatic freight charges generated for an order. You must disable the Auto Calc Freight option to enter a manual freight charge.

Auto Freight

(read only) Displays an order's automatic freight charge when the Auto Calc Freight option is enabled. The amount that displays in the Auto Freight field is dependent on the parameters defined for the Automatic Calculation of Freight Charge option on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

You can override the automatic freight charge in the Manual Freight field once the Auto Calc Freight option is disabled.

Auto Calc Freight

This option enables automatically if the Automatic Calculation of Freight Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Disable the Auto Calc Freight option if you want to enter a manual freight charge in the Manual Freight field.

Restocking

(Not shown in example, applies only to Credit Memo type orders) Add a restocking charge or override the automatic restocking charges generated for an order. The amount that displays in the Restocking field is dependent on the parameters defined for the Automatic Calculation of Restocking Charge option on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

You can override the automatic restocking charge in the Restocking field once the Auto Calc Restocking option is disabled.

Auto Calc Restocking

(Not shown in example, applies only to Credit Memo type orders) This option enables automatically if the Automatic Calculation of Restocking Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Disable the Auto Calc Restocking option if you want to enter a manual restocking charge in the Restocking field.

Entered

(Display only, system generated) Displays the date and time an order was entered.

By

(Display only, system generated) Displays who entered an order.

Updated

(Display only, system generated) Displays the last date and time an order was updated.

By

(Display only, system generated) Displays who last updated an order.

Understanding order hold codes

When you select a hold code from the Hold Code drop-down list on the Order Details tab, an order is prevented from being processed through the order processing stages. An order on hold does not display on the order processing windows, and Hold displays next to the Status field on the Overview tab as an indication that the order is on hold. When you remove an order's Hold Code, the order is released to its appropriate order processing stage.

To place an order on hold, you first must define the hold codes on the HOLD_CODES general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

To view all of the orders on hold, run the Orders On Hold report from the Generate reports window (from Orders, select Generate reports, select Order Status, and select Orders On Hold).

When Orders may require hold codes

- A customer has an outstanding balance on a previous order
- An order is incomplete, and specific questions need to be answered before the order can be shipped
- The customer does not want the order shipped until a certain date

To place an order on hold

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") that is being placed on hold.
3. Select the Order Details tab.
4. Click Edit.
5. (optional) Enter the date the order is scheduled to ship in the Date Scheduled field.
6. Select an order Hold Code from the drop-down list.
7. Enter a Hold Comment.
8. Enter any applicable Notes.
9. Click Save to place the order on hold. Hold will display next to the Status field on the Overview tab.

To release orders placed on hold

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") that you want to release from its hold status.
3. Select the Order Details tab.
4. Click Edit.
5. Select the Hold Code drop-down list to display all of the defined hold codes.
6. Select the blank area at the top of the Hold Code drop-down list. This will remove the previously selected hold code.
7. Delete any comments entered in the Hold Comment field.
8. Click Save. Hold will no longer display next to the Status field on the Overview tab, and the order will be released to its appropriate order processing stage.

To edit an order's freight and handling charges

If you enable the Automatic Calculation of Freight Charge or the Automatic Calculation of Handling Charge option on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges), freight and/or handling charges will be calculated automatically for all orders.

You can disable the automatic calculation options and override an order's freight and handling charges on the Order Details tab. If the automatic calculation options are not enabled, you can enter freight and handling charges for an order manually.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for which you want to edit freight and handling charges.
3. Select the Order Details tab.
4. Click Edit.
5. (optional) Enter the date the order is scheduled to ship in the Date Scheduled field.
6. (optional) Enter a Salesperson.
7. (optional) Enter a Commission Rate for the salesperson.
8. Enter any applicable Notes.
9. If enabled, disable the Auto Calc Handling option.
10. Enter a handling charge in the Manual Handling field.
11. If enabled, disable the Auto Calc Freight option.
12. Enter a freight charge in the Manual Freight field.
13. Click Save to update the freight and handling charges.

To edit a credit memo order's restocking charge

If you are entering credit memo orders and the Automatic Calculation of Restocking Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges), restocking charges are calculated automatically.

You have the option of disabling the automatic calculation option and overriding the calculated restocking charges on the Order Details tab. If the Automatic Calculation of Restocking Charge option is not enabled, you can enter a restocking charge for a credit memo order manually.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter (see "Entering credit memo orders") or open (see "Finding orders") the credit memo order for which you are entering or editing restocking charges.
3. Select the Order Details tab.
4. Click Edit.
5. (optional) Enter an applicable date for the restocking charge in the Scheduled Date field.
6. (optional) Enter a Salesperson.
7. (optional) Enter a Commission Rate for the salesperson.
8. Enter any applicable Notes.
9. Enter any applicable Manual Handling charge.
10. Enter any applicable Manual Freight charge.
11. If enabled, disable the Auto Calc Restocking option.
12. Enter a Restocking charge.
13. Click Save to update the restocking charge.

Entering shipping information

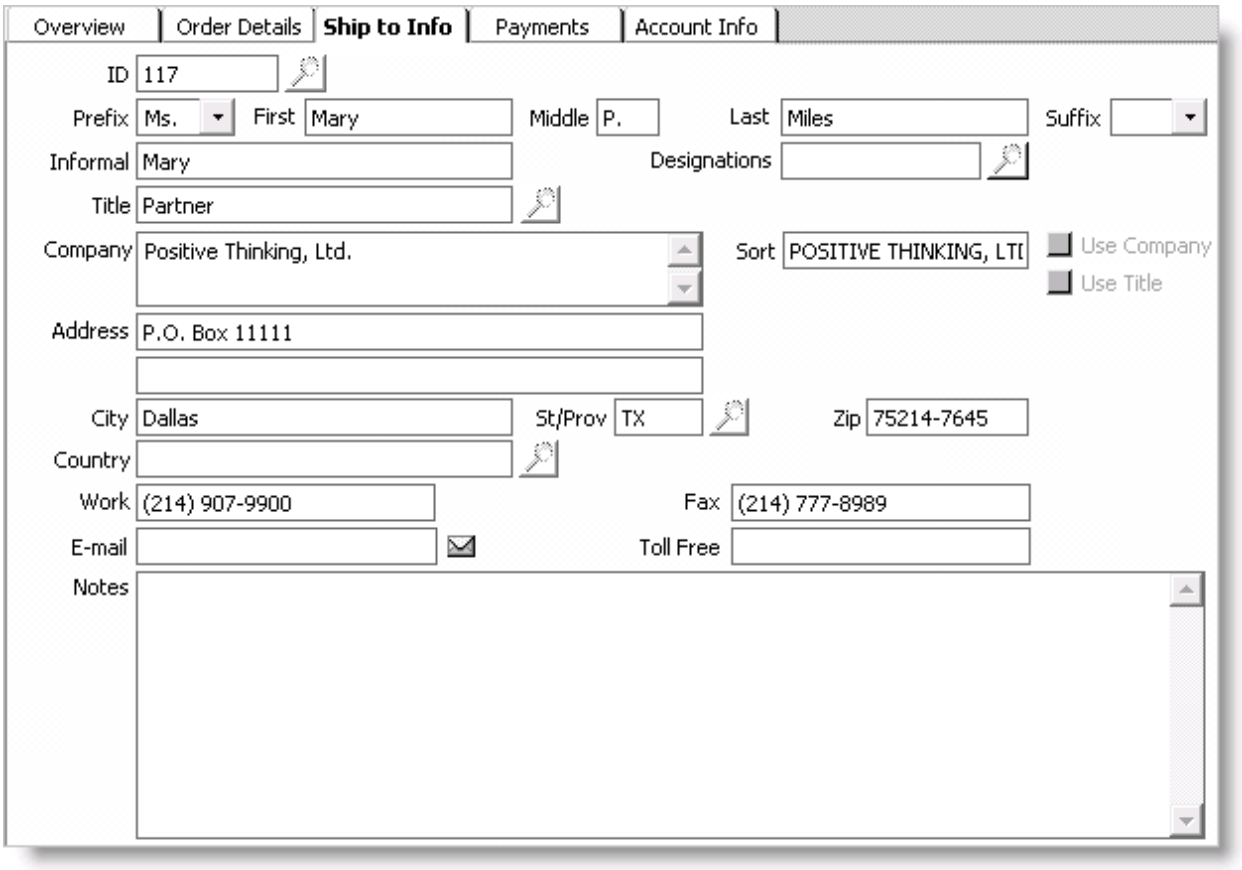
The Ship to Info tab is used to designate a Ship to customer when an order's Ship to and Bill to customer differ. You also can use the Ship to Info tab to edit a customer's name and

address information for an individual order.

By default, the Ship to Info tab displays the Bill to customer's name and address information. When an ID other than the Bill to customer's ID is entered in the ID field, the Ship to customer's name and address information automatically populate the tab.

If necessary, a customer's name and address information can be edited for an order regardless of whether the Bill to and Ship to customer are the same. Changes made to a Ship to customer's name and address information on the Ship to Info tab affect only the order you are editing; updates made on the Ship to Info tab do not affect a customer's record.

Enter and edit orders window - Ship to Info tab



From Orders, select Enter and edit orders, enter or open an order, and select the Ship to Info tab

ID

Enter a 'Ship to' customer's ID; select the Find icon to look up an ID. By default, the ID field displays the 'Bill to' customer's ID, and the Ship to Info tab displays the 'Bill to' customer's name and address information. When an ID other than the 'Bill to' customer's ID is entered in the ID field, the new 'Ship to' customer's name and address information populate the tab.

Prefix

Select a 'Ship to' customer's prefix from the drop-down list, such as Mr., Ms., or Dr.; prefixes are defined on the PREFIX general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

First

Enter a 'Ship to' customer's first name.

Middle

Enter a 'Ship to' customer's middle name.

Last

Enter a 'Ship to' customer's last name.

Suffix

Select a 'Ship to' customer's suffix from the drop-down list, such as Jr., Sr., or III; suffixes are defined on the SUFFIX general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

Informal

(Defaults to the 'Ship to' customer's First name) Enter a 'Ship to' customer's informal name or nickname.

Designations

Enter a 'Ship to' customer's professional designations, such as CPA or MD. Select the Find icon to look up a designation; designations are defined on the DESIGNATION gen-

eral lookup/validation table (from Customers, select Set up tables > General look-up/validation).

Title

Enter a 'Ship to' customer's professional title. Select the Find icon to look up a title; titles are defined on the TITLE general lookup/validation table (from Customers, select Set up tables > General lookup/validation).

Company

Enter a 'Ship to' customer's company name. Depending on the length of the name entered, iMIS may truncate the company name in the Ship to Address area of the Enter and edit orders window.

Sort

Specify a value by which you want to sort a company record (Name.COMPANY_SORT). iMIS automatically removes the first instance of the word “The” from a company name.

Use Company

Enable to include the company name with the Ship To address on reports. This affects only the Ship To address that prints on reports and does not apply to the Bill To address. The Bill To (preferred billing) address's Use Company option is defined on the Customer Setup - Address and Notes window.

When entering product orders, iMIS automatically sets this option to equal the settings on the Customer Setup - Address and Notes window for the customer's preferred billing address (designated on the Manage customers window). You can override the setting on the Ship to Info tab as necessary for the customer's Ship To address (does not affect the Bill To address).

Note: Note: The label for the Use Company option is customizable, so your system may display another label for this option. The value entered in the Institute Type field on the Customer Setup - Basic Options window defines the option's label.

Use Title

Enable to include the customer title with the Ship To address on reports. This affects only the Ship To address that prints on reports and does not apply to the Bill To address. The Bill To (preferred billing) address's Use Title option is defined on the Customer Setup - Address and Notes window.

When entering product orders, iMIS automatically sets this option to equal the settings on the Customer Setup - Address and Notes window for the customer's preferred billing address (designated on the Manage customers window). You can override the setting on the Ship to Info tab as necessary for the customer's Ship To address (does not affect the Bill To address).

Address

Enter a 'Ship to' customer's street address in one or both of the fields. Depending on the length of the address entered, iMIS may truncate the address in the Ship to Address area of the Enter and edit orders window.

City

Enter a 'Ship to' customer's city.

St/Prov

Enter a 'Ship to' customer's state or province. Select the Find icon to look up a state or province.

Zip

(Accepts up to nine characters) Enter a 'Ship to' customer's ZIP code.

Country

(Leave blank to accept the default) Enter a 'Ship to' customer's country. Select the Find icon to look up a country.

Work

Enter a 'Ship to' customer's work telephone number.

Fax

Enter a 'Ship to' customer's fax number.

E-mail

Enter a 'Ship to' customer's e-mail address.

Toll Free

Enter a 'Ship to' customer's toll free telephone number.

Notes

Enter any specific notes about an order.

> **Note:** Note: Do not enter special characters (such as square brackets) in the Notes field. Entering special characters generates an error message and does not allow an order to be completed.

To enter 'Ship to' customer information

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for which you want to edit the 'Ship to' customer's information.
3. Select the Ship to Info tab.
4. Click Edit:
5. (optional) If you are shipping an order to a customer other than the 'Bill to' customer:

- Enter the 'Ship to' customer's ID in the ID field.
- Press Tab to populate the window with the 'Ship to' customer's name and address information.
- Make any necessary changes to the 'Ship to' customer's name and address information. Any changes made affect only the current order and not the customer's record.
- Skip the following step.

6. (optional) Edit the 'Ship to' customer's name and address information. Any changes made affect only the current order and not the customer's record.
7. Click Save.

   The 'Ship to' customer's information displays in the Ship to and Ship to Address fields on the Enter and edit orders window.

   About assigning default shipping methods during order entry

   When you select a 'Ship to' country during order entry, the Shipping Method field on the Overview tab populates automatically with the Default Shipping Method assigned to that country on the Default Shipping Configuration window (from Orders, select Set up module, click Add-on Charges, and click Default Shipping Configuration).

   If no Default Shipping Method is assigned to the 'Ship to' country on the Default Shipping Configuration window, then the order's Shipping Method defaults to the Default Shipping Method defined on the Add-on Charges window (if the appropriate zone and freight-by-weight tables are set up for the Default Shipping Method and 'Ship to' country combination). See Calculating Freight Charges (see "Freight setup") for more on setting up the appropriate zone and freight tables.

   If the appropriate zone and freight-by-weight tables are not set up for the Default Shipping Method and 'Ship to' country combination, no freight charges will calculate. For example, if the Default Shipping Method is UPS, and the 'Ship to' country is England, you must define a zone table for UPS - England and a freight-by-weight table for the 'Ship to' address's zone for freight charges to calculate.

   If no Default Shipping Method is defined for the Orders module on the Add-on Charges window, then you will have to select a Shipping Method from the drop-down list on the Overview tab during order entry. You always have the option of overriding an order's default shipping method when entering or editing orders.

Entering order payments

You have several options when entering order payments:

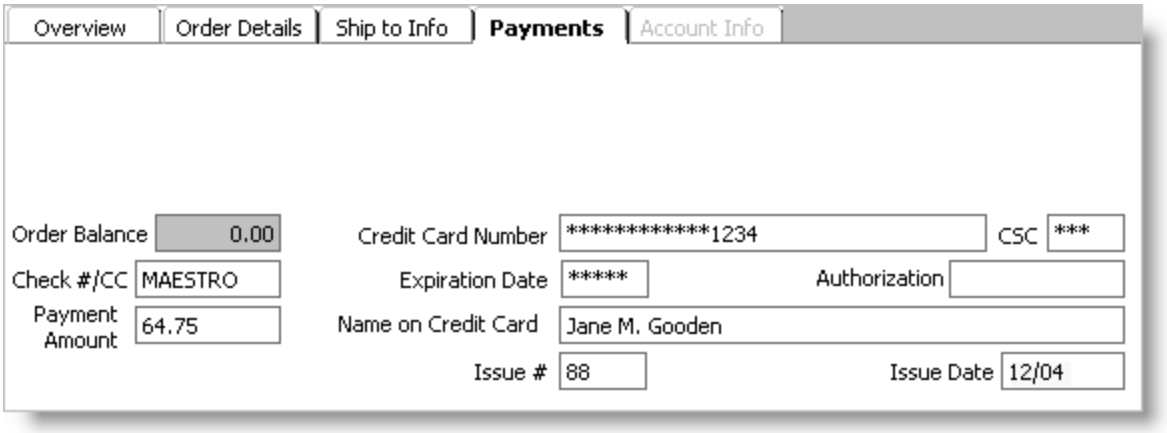
- You can enter a payment when entering an order.
- You can enter a payment after an order is entered but before an order is invoiced.
- You can enter a payment after an order is invoiced.

> **Note:** Note: To authorize credit card payments for Events, Exhibition, Exposition, and Orders, enter them through Service Central > Enter and edit payments (if licensed for SERVCEN) or AR/Cash > Cash receipts (if licensed for CCAUTH (see "Credit Card Authorization")).

Prepayments are entered on the Payments tab. A prepayment is a payment that is entered before an order is invoiced. Post-invoice payments are entered in AR/Cash on the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions > Cash receipts). You also can use the Enter and edit cash receipts window to enter payments after an order has been entered.

> **Note:** Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Enter and edit orders window - Payments tab



From Orders, select Enter and edit orders, enter or open an order, and select the Payments tab

> **Note:** Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Order Balance

(read only) Displays an order's outstanding payment balance. The Order Balance is recalculated each time the Payment Amount is changed.

Credit Card Number

(Required for credit/debit card payments) Enter a credit/debit card number. When a payment is saved, all but the last four digits of the card number are masked.

> **Note:** Note: If you are using credit card authorization, do not enter credit card payments on the Orders Payments tab. See Credit Card Authorization (see "Authorizing Credit Cards in iMIS") for more information.

CSC

(Optional/Displays only if a European debit card code is entered in the Check #/CC field and the associated card authorization account uses the Other gateway and accepts a CSC number for deferred authorization) Enter the European debit card CSC number. When a payment is saved, the CSC number will be masked.

Check # / CC

Enter a check number or credit/debit card code. Credit/debit card codes are defined on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts).

Expiration Date

(Required for credit/debit card payments) Enter a card's expiration date (mm/yy). When a payment is saved, the card's expiration date is masked.

Authorization

(Optional for credit card payments) Enter an authorization code when a credit/debit card payment is processed.

Payment Amount

Enter the amount of a check or credit/debit card payment. You can enter payments in one of the following amounts:

- Full - No open accounts receivable item is tracked through the system.
- Partial - Offsets or reduces the accounts receivable amount.
- None - Sales order amount remains an open receivable. If a customer is paying by credit/debit card, you can enter a credit/debit card code and leave the Payment Amount field blank. If you leave the Payment Amount field blank for a credit/debit card payment, the payment amount will equal the invoiced total when an order is invoiced. If you select this option, a cash entry is generated when you invoice an order.

Name on Credit Card

(Required for credit/debit card payments) Enter the name of the customer whose credit/debit card is used when making a payment. The 'Bill to' customer's full name displays by default.

Issue #

(Optional/Displays when a European debit card code is entered in the Check #/CC field and the associated cash account accepts an issue number) Enter the European debit card issue number.

Issue Date

(Optional/Displays when a European debit card code is entered in the Check #/CC field and the associated cash account accepts an issue date) Enter the European debit card issue date (mm/yy).

To enter a prepayment

When you enter a payment during order entry or before an order is invoiced, the payment is considered a prepayment. Prepayments are entered on the Payments tab.

When you record check prepayments, the payment is applied to the prepaid orders account. Credit/debit card payments are applied immediately to the prepaid orders account when a nonzero payment amount is entered and the Recognize Credit Card Order Payments as Prepaid Cash option is enabled on the AR/Cash Set up module window (from AR/Cash, select Set up module).

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter a new order (see "Entering orders"), or open an existing order (see "Finding orders").
3. While in edit mode, select the Payments tab.
4. If entering a payment by check:

- Enter a check number in the Check #/CC field.
- Enter the amount in the Payment Amount field.

5. If entering a payment by credit card:

- Enter a credit card code, such as VISA or AMEX, in the Check #/CC field. When you enter a credit card code, additional fields display which validate the credit card number, expiration date, authorization code, and name on the credit card.
- Enter the credit card number in the Credit Card Number field. All but the last four digits of the number will be masked when the payment is saved.

- Enter the credit card expiration date in the Expiration Date field. The expiration date will be masked when the payment is saved.
- Enter the name on the credit card in the Name on Credit Card field. Defaults to the 'Bill to' customer's name.
- (optional) Enter a code in the Authorization field.
- Enter the amount in the Payment Amount field.

6. If entering a payment by European debit card:

- Enter a European debit card code, such as MAESTRO, in the Check #/CC field. When you enter a European debit card code, additional fields display which enable you to enter the card number, expiration date, authorization code and name on the card. Depending on the card authorization account used for the European debit card, fields might also display which enable you to enter the card's CSC number, issue number, and issue date.
- Enter the card number in the Credit Card Number field. All but the last four digits of the number will be masked when the payment is saved.
- Enter the card expiration date in the Expiration Date field (mm/yy). The expiration date will be masked when the payment is saved.
- (optional) Enter the card CSC number in the CSC field. The CSC number will be masked when the payment is saved.
- Enter the name on the card in the Name on Credit Card field.
- (optional) Enter a code in the Authorization field.
- Enter the amount in the Payment Amount field.
- (optional) Enter the card issue number in the Issue # field.
- (optional) Enter the card issue date in the Issue Date field (mm/yy).

7. Click OK.

To edit a prepayment

Follow this procedure to edit an order's payment amount only. To edit an order's payment type, see Editing Payment Types.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for which you want to edit a prepayment.
3. Select the Payments tab.
4. Click Edit.
5. Edit the amount in the Payment Amount field.
6. Click OK.

To enter a post-invoice payment

After an order has been invoiced, it no longer can be edited. You must make payments on invoiced orders in AR/Cash on the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions > Cash receipts).

See Entering Cash Receipts in AR/Cash for details about entering such payments.

Viewing account information

After an order is invoiced, you can view an order's account information on the Enter and edit orders window's Account Info tab. The Account Info tab displays a running, itemized transaction log for an order or invoice, such as fees charged, payments received, adjustments, and canceled items. Individual lines display for each transaction and include payment amounts.

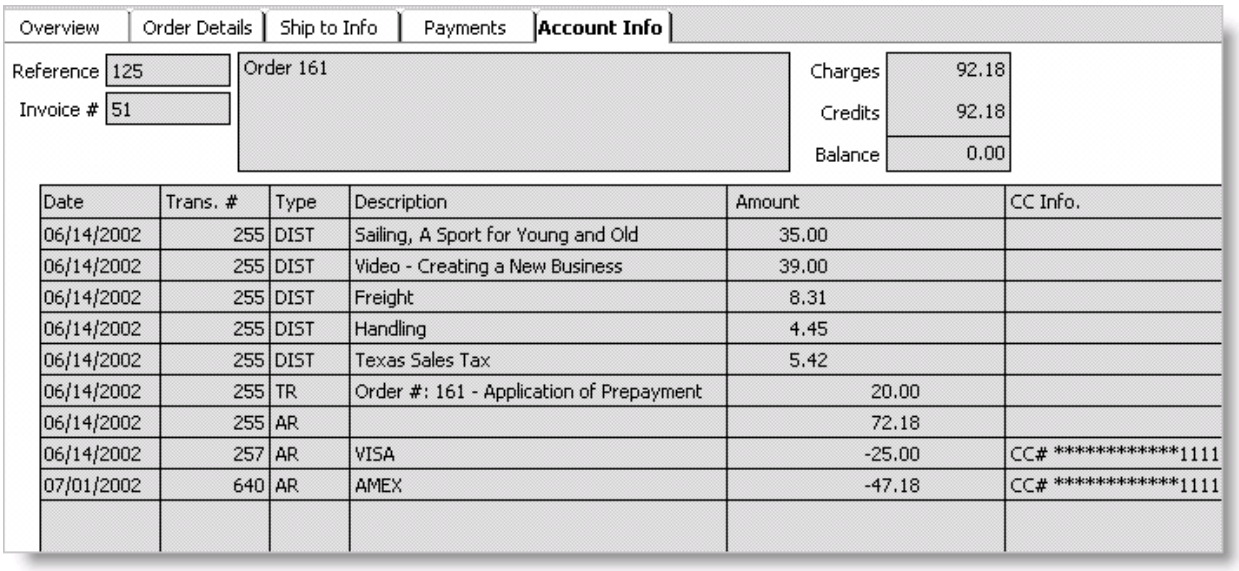
For each transaction line, the Account Info tab displays the date, the transaction number, the transaction type, a description of the transaction, the transaction amount, and any applicable credit card information.

The Enter and edit orders window's Account Info tab is disabled until an order is invoiced. Once you invoice an order, the Account Info tab enables. Invoiced orders cannot be edited on the Enter and edit orders window.

Note: Note: Prepayments generate transaction records even though the Account Info tab is inaccessible until an order is invoiced.

Enter and edit orders window - Account Info tab

The information on this tab is read-only. The ledger (table) view displays each transaction for an order and includes the following transaction information: date, number, type, description, amount, and any applicable credit card information such as the credit card number, credit card expiration date, and the name on the credit card.



From Orders, select Enter and edit orders, open an invoiced order, and select the Account Info tab

Note: Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

To view account information

You can select the Account Info tab for invoiced orders only.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the invoiced order (see "Finding orders") for which you want to open the transaction ledger.
3. Select the Account Info tab to view the order's account information.

Ordering upsell, cross-sell, and replacement items

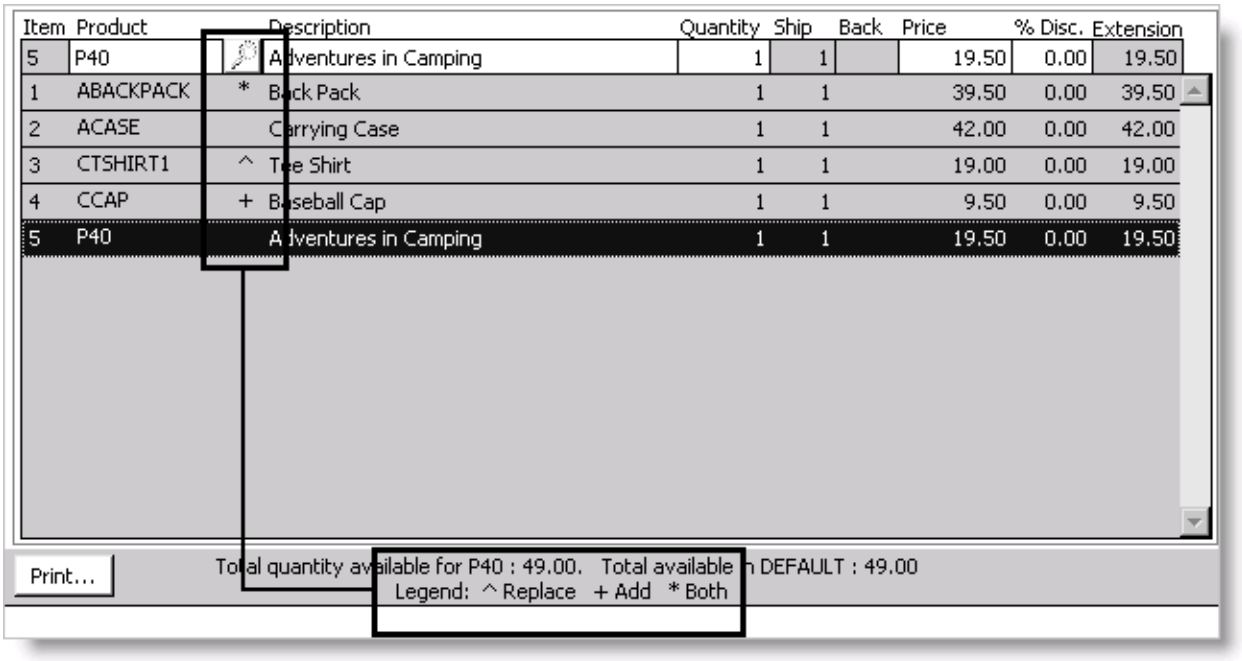
When customers order products, additional items often are available that can replace, that complement, or that are superior to the products initially ordered. However, customers sometimes miss these purchasing opportunities because they are unaware that additional items are available.

If you designate Upsell, Cross-sell, or Replacement items for a product on the Upsell/Replace window (accessible by clicking Upsell/Replace on the Manage products window), the items are easily accessible during order entry from the Opportunities window, which opens from the Overview tab. You then can replace a product with an Upsell or Replacement item, or you can add Upsell, Cross-sell, and Replacement items to the order.

Direct access to Upsell, Cross-sell, and Replacement items during order entry significantly helps organizations to increase revenue from the sale of additional items and higher-margin products:

- Upsell - To persuade a customer to purchase a product that may have a greater value than the product initially chosen. Upsell items can replace products or can be added to orders as additional items. No pricing rules exist for products designated as Upsell items, and Upsell items do not have to cost more than the products they replace.
- Cross-sell - To persuade a customer to purchase one or more similar items that complement the product initially chosen. Cross-sell items are added to orders in addition to initial product selections.
- Replace - To offer a customer an alternative item to take the place of the product initially chosen. Replacement items can replace products or can be added to orders as additional items.

Using the Opportunities Legend



Example of the Opportunities Legend on the Overview tab

As an indicator of a product's available opportunities, an Opportunities Legend displays at the bottom of the Overview tab as long as one line item has unrealized opportunities. Each line item that has unrealized opportunities is indicated by one of the following characters displaying next to the Product code:

'+' - Indicates an item has Cross-sell opportunities

'^' - Indicates an item has Upsell opportunities

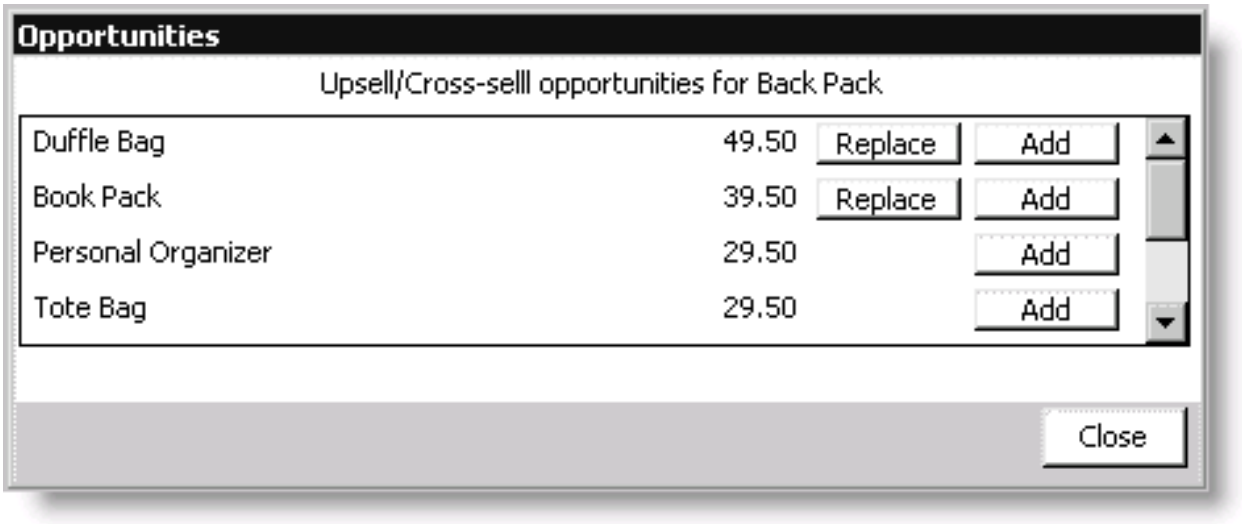
'*' - Indicates an item has both Upsell and Cross-sell opportunities

Opportunities window

Both stock and non-stock items display on the Opportunities window. Items sort with Upsell items listed before Cross-sell items. Within each group of opportunity items, items then sort by price in descending order.

For an Upsell/Cross-sell/Replacement item to display on the Opportunities window, it must meet the following criteria:

- The item must not be part of the current order
- The item's status must be Active
- For a stock item, inventory must be available in the item's Default warehouse



From Orders, select Enter and edit orders, and select a line item

Title

Displays the product's title as defined on the Manage products window. If a product does not have a title, its product code displays. The title displays as follows:

“Upsell/Cross-sell opportunities for product title”

Opportunity Items

Displays all Upsell, Cross-sell, and Replacement opportunity items that currently exist for a product:

- Description - Displays the Upsell/Cross-sell/Replacement item's title as defined on the Manage products window. If an item does not have a title, its product code displays.
- Price - Displays the Upsell/Cross-sell/Replacement item's price as defined on the Manage products window. Use Member Pricing (see "Enter and edit orders window - Overview tab") is honored, but Special Pricing is not.

- Replace button - Click to replace a product with an Upsell/Replacement item.
- Add button - Click to add an Upsell/Cross-sell/Replacement item to an order.

To open the Opportunities window

When you open the Opportunities window, whether you open the window in read-only mode or in enter-and-edit mode determines how the window functions:

Read-only mode

Open an order in read-only mode, and select a line item that has designated Upsell, Cross-sell, or Replacement items. The Opportunities window opens, and all existing Upsell, Cross-sell, and Replacement opportunities designated for the selected product display:

- Upsell and Replacement opportunities display with Add and Replace buttons (disabled)
- Cross-sell opportunities display with Add buttons (disabled)

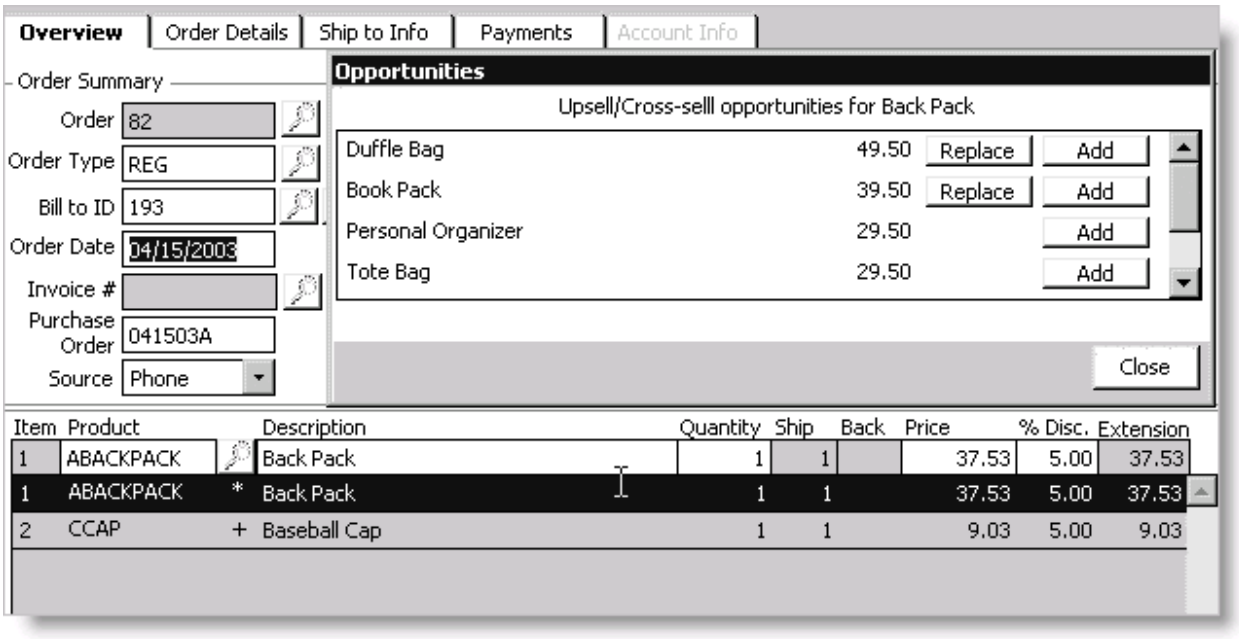
If you select another line item that has Upsell, Cross-sell, or Replacement opportunities, the Opportunities window remains open, and the data on the window refreshes.

Enter-and-edit mode

Enter or edit an order, and enter or select a line item that has Upsell, Cross-sell, or Replacement opportunities. The Opportunities window opens automatically, and all existing Upsell, Cross-sell, and Replacement opportunities designated for the product display:

- Upsell and Replacement opportunities display with Add and Replace buttons (enabled)
- Cross-sell opportunities display with Add buttons (enabled)

If you select another line item that has Upsell, Cross-sell, or Replacement opportunities, the Opportunities window remains open, and the data on the window refreshes. If you Tab to or select a blank line item, the Opportunities window disappears until you enter or select another line item that has Upsell, Cross-sell, or Replacement opportunities.



Example of the Opportunities window and Overview tab during order entry

To close the Opportunities window

To close the Opportunities window, do one of the following:

- Select a line item that does not have existing Upsell, Cross-sell, or Replacement opportunities
- Click an area outside the order line grid of the Overview tab
- Click Close on the Opportunities window

To add opportunity items to an order

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter a new order, or open an existing order (see Entering Orders or Finding Orders). Opportunity indicators designate which products have available opportunities.
3. While in the edit mode, click on the line item for which you want to add opportunity items. The Opportunities window opens.

4. Select an opportunity item, and click Add to add a new line item to the order for the Upsell, Cross-sell, or Replacement item:

   The Qty is set to zero, the Opportunities window refreshes (the added item is removed from the window), and each line item's Opportunity indicator refreshes.

5. Enter a Qty for the added item.

6. Click Save.

   To replace products with opportunity items

1. From Orders, select Enter and edit orders to open the Enter an edit orders window. The Overview tab displays by default.

2. Enter a new order (see "Entering orders"), or open an existing order (see "Finding orders"). Opportunity indicators designate which products have available Replacement opportunities.

3. While in the edit mode, click on the line item you want to replace. The Opportunities window will open.

4. Select an opportunity item, and click Replace to update the original product's line item data with the Upsell or Replacement item's data.

   The Qty changes to the quantity originally ordered. The order's discounts, taxes, and prices recalculate to reflect the Upsell or Replacement item's data. The Opportunities window refreshes with the Upsell or Replacement item's available opportunities. Each line item's Opportunity indicator refreshes.

5. Click Save.

   To replace out of production products that have no inventory available

   The functionality for replacing Out of Production products that do not have inventory available is different from replacing products for which inventory is available. When you replace a product, the Overview tab's focus remains on the first line item as long as you do not Tab out of the Qty field.

By keeping the focus on the first line item, you see all products (on the refreshed Opportunities window) linked to the Replacement item. As items are added from the Opportunities window, each additional item's Qty is set to zero, and the Overview tab's focus remains on the first line item (the original Replacement item) as long as you do not Tab out of the Qty field.

For each item added from the Opportunities window (for the original Replacement item), you must manually enter the Qty ordered by either Tabbing to or selecting each newly added line item.

Ordering products from multiple warehouses

The multi-warehouses functionality of iMIS allows you to order individual products from multiple warehouse locations using the Product Detail window. This is a useful feature when the default warehouse has insufficient inventory to fill product orders.

The following are the requirements for ordering from multiple warehouse locations:

- The Enable Multi-Warehouses option must be enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory).
- Multiple warehouse locations must be defined for the product on the Warehouses window (from Orders, select Manage inventory> Manage products, select from the list of Current Products, and click Warehouses).
- Each warehouse location must have sufficient inventory to fill an order.

To order a product from a non-default warehouse

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click New.
3. Enter the order information:

- Order Summary information
- Shipping Summary information

- Tax Summary information
- General information

4. Enter the product line-item information, and press Tab to add the product to the order. The product will display in the list of Product Line Items, and your cursor will be in the Product field.
5. Double-click the product line-item to open the Product Detail window.
6. Enter the Warehouse from which you want to ship the product:

- Enter a warehouse with sufficient inventory in the Warehouse field; or
- Select the Warehouse field's Find icon, select a warehouse with sufficient inventory, and click OK.

7. Click OK to close the Product Detail window.
8. Click Save.

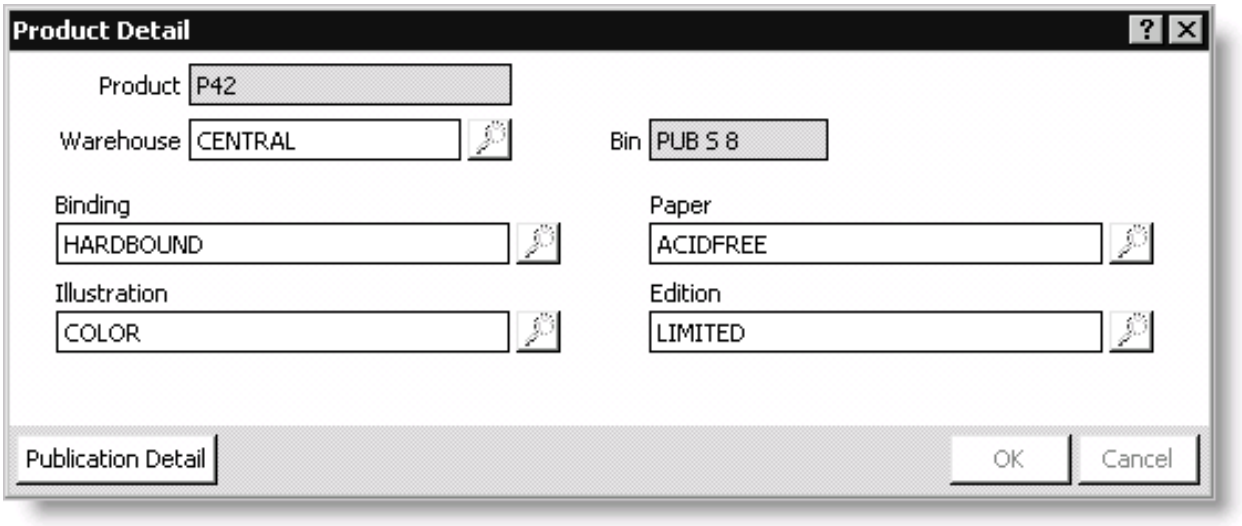
Entering detailed product information

Detailed and specific order information is entered for products on the Product Detail window. The Product Detail window is accessible by double-clicking a product line-item on the Overview tab.

When entering or editing orders, some products may require entering specific information before an order can be completed or shipped. For example, if an ordered product is an article of clothing, you may need to specify size or color. If an ordered product is a publication, you may need to specify a specific binding or paper type. Regardless of the product or product type, iMIS Orders incorporates the flexibility needed for entering detailed order information for products.

If you are using Multi-Warehouses, the Product Detail window also allows you to order individual products from other than a default warehouse. This is useful if a product's default warehouse does not have sufficient inventory to fill an order.

Product Detail window



From Orders, select Enter and edit orders, enter or edit an order, and double-click a product line-item

Product

(read only) Displays a selected product's code.

Tax Code

(Not shown in example, VAT only) Use this field to override the default tax code assigned to a product.

VAT

(Not shown in example, display/VAT only) Displays the tax amount based on the product price and tax rate.

Warehouse

(Multi-Warehouses only) Use this field to override the default warehouse from which a product will ship. A product's default warehouse can be overridden only with a warehouse that is pre-defined for the product.

Bin

(Display/Multi-Warehouses only) Displays the specific warehouse bin in which a product is stored.

User-Defined fields

(UF_1 through UF_4) Enter specific order information for a product, or select the Find icon to look up any predefined data.

Publication Detail button

(optional) Opens the Publication Detail window. The Publication button displays only if the following two conditions are true:

- The Use Publication Demographics option is enabled on the Set up product categories window (from Orders, select Set up tables > Product categories).
- At least one field is populated with data on a product's Publication Demographics window.

To enter detailed product information

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter a new order (see "Entering orders"), or open an existing order (see "Finding orders").
3. While in the edit mode, double-click the product line-item for which you want to enter specific order information. The Product Detail window will open.
4. (Optional, only if using Multi-Warehouses) Override the product's default Warehouse if necessary:
   - Enter a Warehouse; or
   - Select the Warehouse fields Find icon, and select a warehouse with sufficient inventory to fill the order.
5. Enter the product's specific order information in the available user-defined fields, or select the user-defined fields' Find icons to look up any predefined general lookup/validation

data.

Note: The user-defined field labels are set up according to product category on the Set up product categories window (from Orders, select Set up tables > Product categories).

6. Click OK to close the Product Detail window.
7. Click Save to save the order information.

Viewing publication details

The Publication Detail window allows you to view specific, predefined publication information about a product. The Publication Detail window is accessible by clicking the Publication button on the Product Detail window.

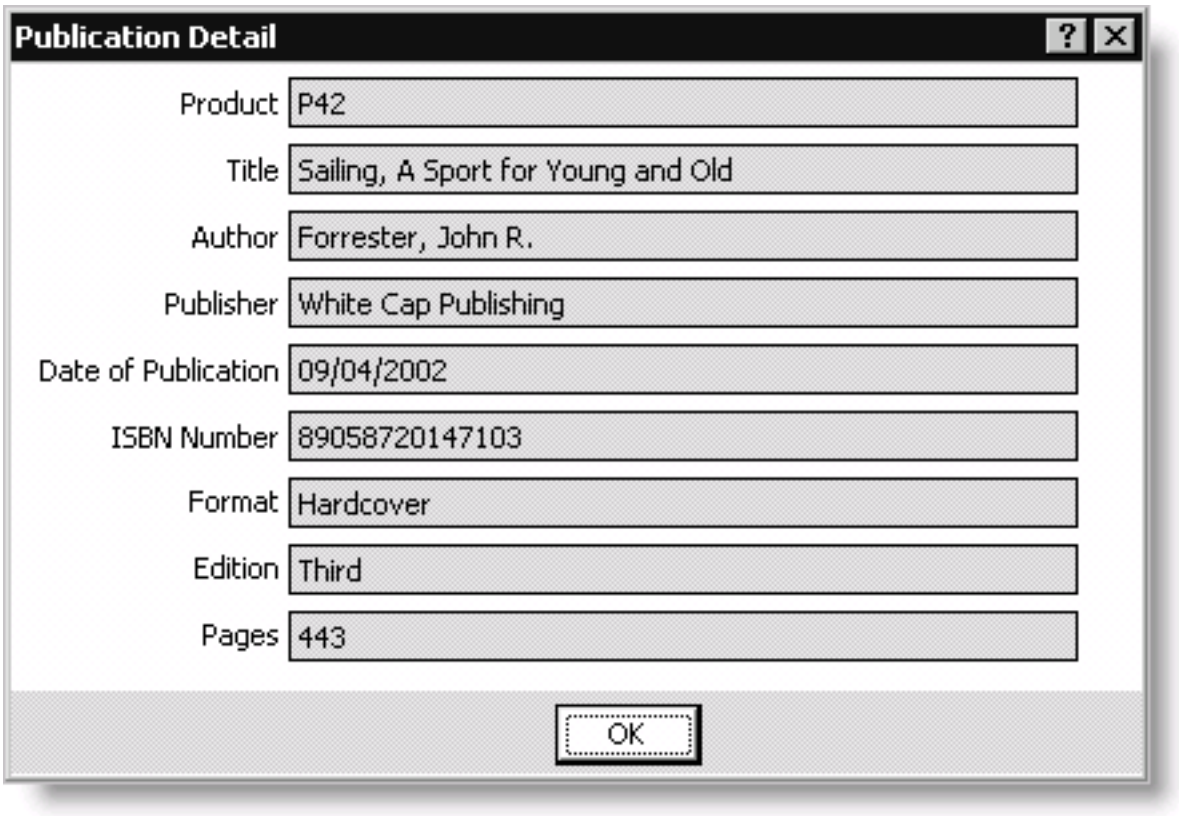
Publication information is defined for products on the Publication Demographics window (from Orders, select Manage inventory> Manage products, select a product from the list of Current Products, and click Publication).

The Publication button is available on the Product Detail window only if the following two conditions are true:

- The Use Publication Demographics option is enabled for a product's category on the Set up product categories window.
- At least one field is populated with data on a product's Publication Demographics window.

Publication Detail window

The information on this window is read-only.



From Orders, select Enter and edit orders, enter or edit an order, double-click a product line-item, and click Publication

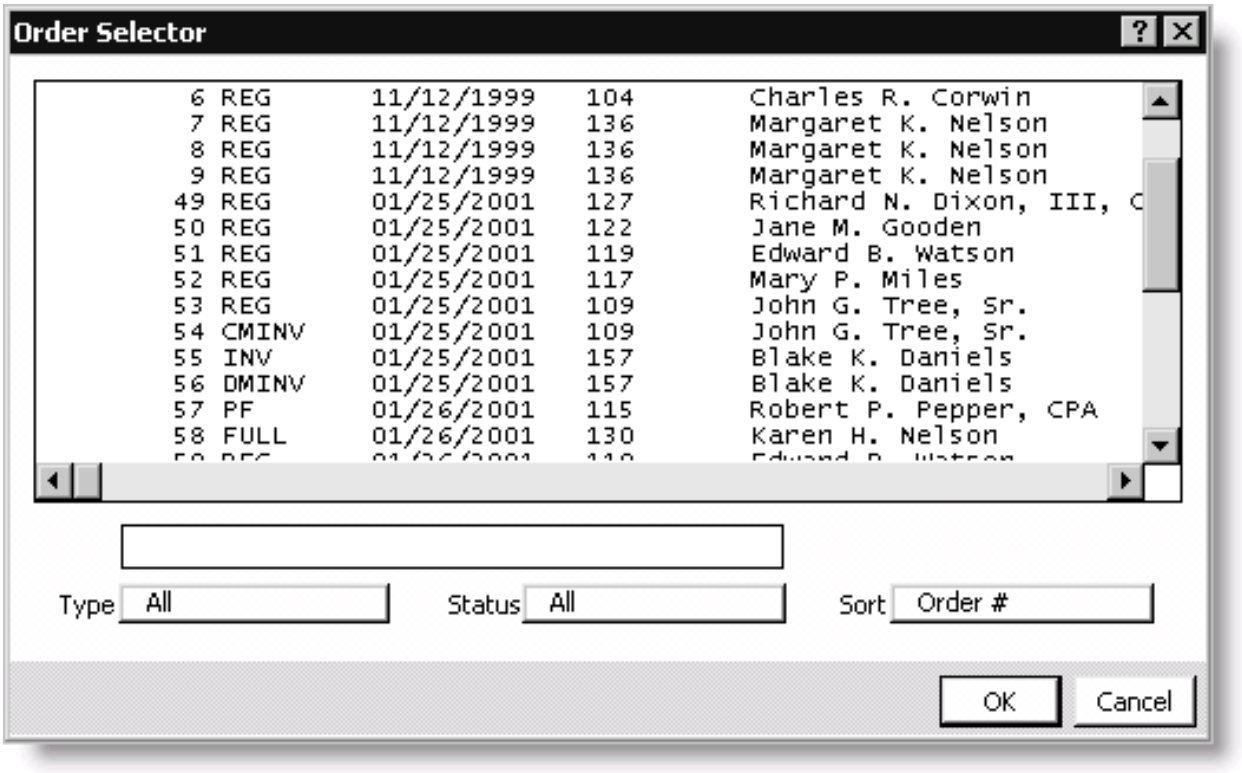
To view publication details

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter a new order (see "Entering orders"), or open an existing order (see "Finding orders").
3. While in edit mode, double-click the product line-item for which you want to view publication details. The Product Detail window will open.
4. Click Publication Detail to open the Publication Detail window and view the product's detailed publication information.

Finding orders

When opening orders, the Order Selector window is a useful search tool if specific order information is not available. If the order number or 'Bill to' ID is not known, you can use the Order Selector window to view a group of orders based on a specific order type and/or order status. This makes finding specific orders a simple and efficient process.

Order Selector window



From Orders, select Enter and edit orders, click Open or Find, select the Order field's Find icon, and click OK

Orders

Lists all of the orders entered in the system.

Search

Enter the 'Ship to' customer's complete or partial last name.

Type button

(Defaults to All) Click to display a drop-down list of order types defined on the Set up order types window (from Orders, select Set up tables > Order types). Select the order type by which you want to search.

Status button

(Defaults to All) Click to display a drop-down list of each system-defined order status. Select the order status by which you want to search.

Sort button

Click to sort the orders returned by your search. Select from one of the following sort options:

- Order # - (default) Sorts all orders by order number.
- Order Date - Sorts all orders by order date.
- Type - Sorts all orders by order type.
- Customer - Sorts all orders alphabetically by last name.
- Company - Sorts all orders by company name.
- Status - Sorts all orders by order status.
- Entered By - Sorts all orders by operator name or number.

To open an order

Follow this procedure to open an existing order if you know the order number.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click Open or Find.
3. Enter the order number in the Order field.
4. Click OK.

To find an order using an invoice number

Follow this procedure to open an invoiced order if you know the order's invoice number.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click Open or Find.
3. Enter the invoice number in the Invoice # field (select the Find icon to look up the invoice number).
4. Click OK to open the order on the Enter and edit orders window.

To find an order using the 'Bill to' customer's ID

Follow this procedure to open an existing order if you know the 'Bill to' customer's ID.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click Open or Find.
3. Press Tab to go to the Bill to ID field, and enter the 'Bill to' customer's ID (select the Find icon to look up an ID).
4. Click OK. The Order Selector window opens and displays a list of orders for the 'Bill to' customer's ID.
5. Select the order you want to open from the Orders field.
6. Click OK to open the order on the Enter and edit orders window.

To search for an order

Follow this procedure to search for and open an existing order for which specific order information is not available.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click Open or Find.
3. Select the Order field's Find icon to open the Order Selector window.

4. Search for an order using one of the search methods.
5. Select the order you want to open from the Orders field.
6. Click OK to open the order on the Enter and edit orders window.

Procedure reference

There are three different methods that you can use to search for an order:

- Search from a list of all existing orders by clicking OK on the Order Selector window to display a list of all existing orders.
- Narrow your search according to the 'Ship to' customer's last name:
- Enter the 'Ship to' customer's complete or partial last name in the Search field. If you enter a complete last name, all orders display for anyone having that last name. If you enter a partial last name or the first letters of a last name, all orders display for anyone whose last name begins with those letters.
- Click OK.
- Narrow your search according to a specific order type and/or order status:
- Click Type or Status to narrow your search to a specific order type or status, respectively.
- Click Sort to sort the search results.
- Click OK.

Editing orders

iMIS Orders allows you to edit orders that have not been invoiced. Editing may be required for different situations. For example, a customer may decide to change either the products or product quantity ordered, or the wrong shipping information may have been entered for an order.

Whatever the reason, you have the ability to edit orders that have not been invoiced. Once an order is invoiced, it can no longer be edited or canceled. Debit memo orders are

used to increase the number of products purchased for an original invoiced order, and credit memo orders are used to reverse an invoiced order.

To edit the product quantity ordered

Follow this procedure to edit the products ordered, to edit the quantity ordered, or to delete a product from an order.

> **Note:** Note: You cannot edit an order that has been invoiced.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") from which you want to delete a product.
3. Click Edit.
4. From the list of Product Line Items, select the product that you are going to edit.
5. Place your cursor in the line-item's Quantity field, and update the product quantity. If you are deleting a product from an order, enter a zero (0).
6. Click Save to update the order. The Price field will continue to display the product price, but the Extension field will display the updated total product price for the order. The Order Total and Balance fields will update accordingly.

To add a product to an existing order

Follow this procedure to add a product to an existing order. To add a product to an existing order, the order must not have been invoiced. If additional products need to be added to an invoiced order, you must enter a debit memo order.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") to which you want to add a product.
3. Click Edit.

4. Without deleting any applicable discount, place your cursor in the% Disc field of the last line item of the order, and press Tab. Your cursor now will be in the Product field.
5. Enter the product code in the Product field, or select the Find icon to open the Product Find window and search for a product (see "Searching for products").
6. Enter the number of new products ordered in the Quantity field.
7. (optional) Edit the product Price if necessary.
8. (optional) Enter a percentage discount for the product in the % Disc field.

   Entering a product-level discount in the % Disc field overrides any order-level discount entered in the % Discount field. However, product-level discounts are applicable only for a given product and do not affect entire order-level discounts.
9. Press Tab to add the product to the order. The product will display in the list of Product Line Items, and your cursor will be in the Product field.
10. Repeat this process for each additional product to be purchased.
11. Click Save to update the order.

    To override a product's default warehouse

    If you are using Multi-Warehouses, follow this procedure to override a product's default warehouse. To override a product's default warehouse, multiple warehouses must be defined for the product on the Warehouses window.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter a new order (see "Entering orders"), or open an existing order (see "Finding orders").
3. While in the edit mode, double-click the product line-item for which you want to enter specific order information. The Product Detail window will open.
4. (Optional, only if using Multi-Warehouses) Override the product's default Warehouse if necessary:

- Enter a Warehouse; or
- Select the Warehouse field's Find icon, and select a warehouse with sufficient inventory to fill the order.

5. Click OK to close the Product Detail window.
6. Click Save to save the order information.

To place a product on backorder

If a customer orders a product that incorrectly shows to be in inventory, you can edit the order and place the product on backorder if the order has not been invoiced.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for the product you need to place on backorder.
3. Click Edit.
4. Select the product that you are going to place on backorder from the list of Product Line Items.
5. While pressing Shift, place your cursor in the Ship field. The Ship field enables and becomes editable.
6. Enter a zero in the Ship field, and press Tab. This will update the Back field with the original product quantity ordered, and the Ship field will be cleared.
7. Click Save. The Committed field on the Manage products window will decrease by the number of products placed on backorder.

Canceling orders

You can cancel an un-invoiced order with or without a credited payment (prepayment). Canceling an order without a prepayment reverses an order. Canceling an order with a prepayment creates a credit balance. You can apply a credit balance to another order or issue a refund to a customer.

To cancel an order

Follow this procedure to cancel an un-invoiced order without a prepayment. A canceled, un-invoiced order without a prepayment does not generate invoice or transaction line items. Therefore, the Enter and edit orders window's Account Info tab will not reflect any record of either the order or the cancellation of the order.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") you want to cancel.
3. Click Delete. A system message prompts you to verify the cancellation of the order.
4. Click Yes to cancel the order. CANCELED displays in the Status field.

To cancel an order with a cash prepayment

Follow this procedure to cancel an un-invoiced order with a cash prepayment. A canceled, un-invoiced order with a cash prepayment will generate a credit balance on the Customer Management Transaction Ledger window (from Customers, select Manage customers, select the AR/Cash tab on the History section, and double-click the order). However, a canceled, un-invoiced order will not generate any transactions on the Enter and edit orders window's Account Info tab.

When canceling an order with a cash prepayment, you can apply a credit balance to another order or issue a refund to the customer. See Accounts Receivable (see "AR/Cash") for details about applying credit balances (see "Recording credit memos") and issuing refunds (see "Creating credit invoices").

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") you want to cancel.
3. Click Delete. A system message prompts you to verify the cancellation of the order.
4. Click Yes to cancel the order.

To cancel an order with a credit card prepayment

Follow this procedure to cancel an un-invoiced order with a credit card prepayment. The following steps will cancel both an order and a credit card prepayment.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") you want to cancel.
3. Select the Payments tab.
4. Click Edit.
5. Delete the amount in the Payment Amount field, but do not alter any data in the other fields:

- Do not delete the data in the Check # / CC, Credit Card Number, Expiration Date, or Name on Credit Card fields. In order to apply a reversal to the correct cash account and for a payment method to reflect the correct reverse entry, the original, correct data must be entered in these fields.
- If the Recognize Credit Card Order Payments as Prepaid Cash option is enabled on the AR/Cash Set up module window (from AR/Cash, select Set up module), deleting a payment removes the value from the following fields: Orders.RECOGNIZED_CASH_AMOUNT, Invoice.CREDITS, and Invoice.BALANCE.
- If the Recognize Credit Card Order Payments as Prepaid Cash option is not enabled, Orders.RECOGNIZED_CASH_AMOUNT is not populated, and an invoice transaction is not created.

6. Click OK to delete the credit card prepayment.
7. Click Delete. The Enter and edit orders window defaults to the Overview tab, and a system message prompts you to verify the cancellation of the order.
8. Click Yes to cancel the order.

To cancel an invoiced order

See "Entering credit memo orders".

To restore a canceled order

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") you want to restore.
3. Click Edit. A message displays prompting you to restore the order.
4. Click Yes. A message displays prompting you to proceed with the order edit.
5. Click OK to restore the order, and make any necessary edits.
6. Click Save.

Editing payment types

If a payment type is applied to an order in error, you can edit the payment type. However, you need to be aware of several possible error scenarios related to whether the Recognize Credit Card Order Payments as Prepaid Cash option on the AR/Cash Set up module window (from AR/Cash, select Set up module) is enabled or disabled.

Recognize Credit Card Order Payments as Prepaid Cash - option enabled

When the Recognize Credit Card Order Payments as Prepaid Cash option is enabled, the following scenarios will cause an error if you try to edit the Check # / CC field on the Enter and edit orders window's Payments tab:

- Changing the payment type from cash/check to credit/debit card when the Orders.RECOGNIZED_CASH_AMOUNT field is populated
- Changing the payment type from credit/debit card to cash/check when the Orders.RECOGNIZED_CASH_AMOUNT field is populated
- Changing the payment type from one credit/debit card to another when the credit/debit card cash accounts are different and the Orders.RECOGNIZED_CASH_AMOUNT field is populated

To edit a payment type recognized as prepaid cash

Follow this procedure to edit a payment type when the Recognize Credit Card Order Payments as Prepaid Cash option is enabled.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for which you want to edit the payment type.
3. Select the Payments tab.
4. Click Edit.
5. Delete the amount in the Payment Amount field, but do not alter any data in the other fields. If you try to edit the Check # / CC field on the Payments tab without first deleting the amount in the Payment Amount field, you will receive an error message.
6. Click OK on the Payments tab.
7. Click Edit.
8. If you are entering a payment by cash or check, enter the cash payment type or check number in the Check # / CC field.
9. If you are entering a payment by credit card, enter the credit card payment type in the Check # / CC field and any other required data in the following fields:
   - Enter a Credit Card Number.
   - Enter a credit card Expiration Date.
   - (optional) Enter a credit card Authorization code.
   - Enter the name on the credit card in the Name on Credit Card field.
10. If you are entering a payment by European debit card, enter the European debit card payment type in the Check # / CC field and any other required data in the following fields:
    - Enter the card number in the Credit Card Number field.
    - (optional) Enter the card's CSC number.
    - Enter a card Expiration Date (mm/yy).

- (optional) Enter an Authorization code.
- Enter the name on the card in the Name on Credit Card field.
- (optional) Enter the card's issue number in the Issue # field.
- (optional) Enter the card's Issue Date (mm/yy).

11. Enter the correct Payment Amount.
12. Click OK to update the payment information.

Recognize Credit Card Order Payments as Prepaid Cash - option disabled

When the Recognize Credit Card Order Payments as Prepaid Cash option is disabled, the following scenario will cause an error if you try to edit the Check # / CC field on the Payments tab:

- Changing the payment type from credit/debit card to cash/check when the Orders.RECOGNIZED_CASH_AMOUNT field is populated.

To edit a payment type not recognized as prepaid cash

Follow this procedure to edit a payment type when the Recognize Credit Card Order Payments as Prepaid Cash option is disabled.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open the order (see "Finding orders") for which you want to edit the payment type.
3. Select the Payments tab.
4. Click Edit.
5. If you are entering a payment by cash or check, enter the cash payment type or check number in the Check # / CC field.
6. If you are entering a payment by credit card, enter the credit card payment type in the Check # / CC field and any other required data in the following fields:

- Enter a Credit Card Number.
- Enter a credit card Expiration Date.
- (optional) Enter a credit card Authorization code.
- Enter the name on the credit card in the Name on Credit Card field.

7. If you are entering a payment by European debit card, enter the European debit card payment type in the Check # / CC field and any other required data in the following fields:

- Enter the card number in the Credit Card Number field.
- (optional) Enter the card's CSC number.
- Enter a card Expiration Date (mm/yy).
- (optional) Enter an Authorization code.
- Enter the name on the card in the Name on Credit Card field.
- (optional) Enter the card's issue number in the Issue # field.
- (optional) Enter the card's Issue Date (mm/yy).

8. Enter the correct Payment Amount if necessary.
9. Click OK to update the payment information.

Applying credit balances as orders payment

If a customer has an open credit balance, you can apply this credit balance as payment for either an existing order or a new order. You can apply all or part of a credit balance as payment. If you attempt to apply an amount in excess of the credit balance, an error message will be generated. Credit balances are applied as payment by using the *Tab command.

Selecting open payments for orders: *Tab

When you enter an asterisk (*) in the Check # / CC field on the Enter and edit orders window's Payments tab and then press Tab, the Select Open Payments window opens. This

window is used for applying open credit balances as payment for new and existing orders.

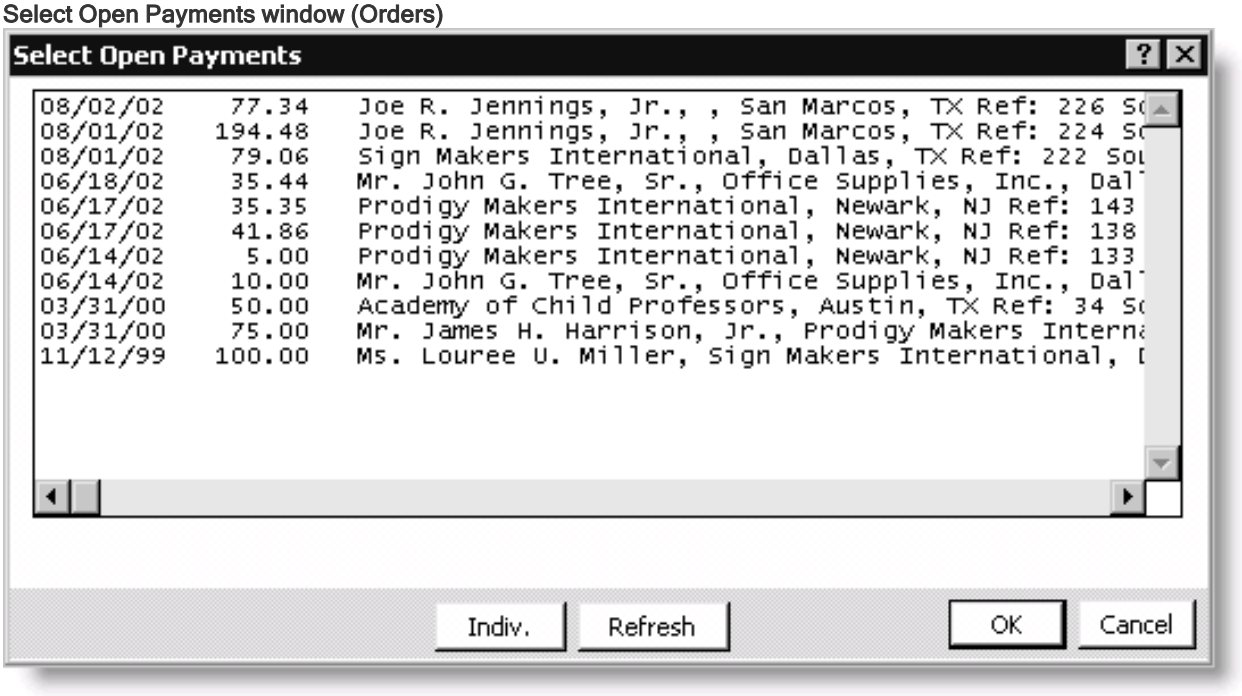
When you first open the Select Open Payments window for a given customer, any open credit balances the customer has display on the window. If a customer has generated several credit balances on different occasions, each individual open credit balance displays. However, you can select only one credit balance at a time on the Select Open Payments window when applying credit balances as payment.

Applying credit balances to other customers

When in the All view, any open credit balance can be applied to a customer's account for which you are entering payment. For example, if a customer is an employee of the XYZ Corporation and XYZ has an open credit balance, you can apply XYZ's credit balance as payment for the customer's order.

After applying a credit, the Trans.INVOICE_REFERENCE_NUMBER will be the same for both the customer who generated the credit balance and the customer for whom the credit balance was applied.

Select Open Payments window (Orders)



From Orders, select Enter and edit orders, open an order, select the Payments tab, click Edit, and use the * Tab command

Credit Balances

Displays the credit balances for either a single customer or all of your customers depending on which view is enabled. Each line indicates an individual credit balance and includes the following information:

- The date the credit balance was generated
- The amount of the credit balance
- The name of the customer
- The customer's city and state
- The reference number of the credit balance transaction
- The iMIS system module in which the credit balance was generated

All/Indiv button

Click to toggle between the All and Individual views. The Individual view displays all of the open credit balances for a given customer. The All view displays all of the open credit balances for all of your customers.

Refresh button

Click to refresh the data on the window.

To apply a credit balance as Orders payment

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Enter or open an order. (See Entering Orders or Finding Orders.)
3. While in the Edit mode, select the Payments tab.
4. Enter an asterisk (*) in the Check # / CC field.
5. Press Tab to open the Select Open Payments window.

6. Select the open credit balance you want to apply as payment from either the Individual or All view.

- Click Indiv to display all of the open credit balances for a given customer.
- Click All to display all of the open credit balances for all of your customers.

7. Click OK to close the Select Open Payments window.
8. Enter the amount of the credit balance you are applying as payment in the Payment Amount field. The credit balance's reference number will display next to the asterisk in the Check # / CC field.
9. Click OK to apply the credit balance as payment. The amount of the credit balance you entered in the Payment Amount field will display in the Paid field on the Overview tab.

Entering credit memo orders

Invoiced orders cannot be canceled; therefore, you reverse an invoiced order by entering a credit memo order against an original order's invoice number. Because the audit trail would be lost, entering a credit memo order does not update an original, invoiced order.

To enter a credit memo order (cancel an invoiced order)

1. View the original order details and note the information you need to enter a credit memo:

- The Bill to ID
- The Invoice #
- The Source code
- The Product code
- The Quantity
- The Freight and Handling charges, if any

2. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.

3. Click New. The Order Date defaults to the batch date if batch control is used; otherwise, the date defaults to the system date.
4. Enter the credit memo (CM) order type in the Order Type field (select the Find icon to look up the order type).
5. Press Tab to go to the Bill to ID field. The Invoice # field enables.
6. Enter the Bill to ID.
7. Override the Order Date if necessary.
8. Enter the original order's invoice number in the Invoice # field (select the Find icon to look up the invoice number).
9. Enter a source code in the Source field.
10. Enter the product code from the original order in the Product field.
11. Enter the product Quantity from the original order and press Tab.

    When you tab out of the Quantity field, the Quantity, Ship, Extension, Product Total, Tax, Order Total, and Balance fields are updated automatically to a negative number.
12. Enter the freight and handling charges to be refunded.

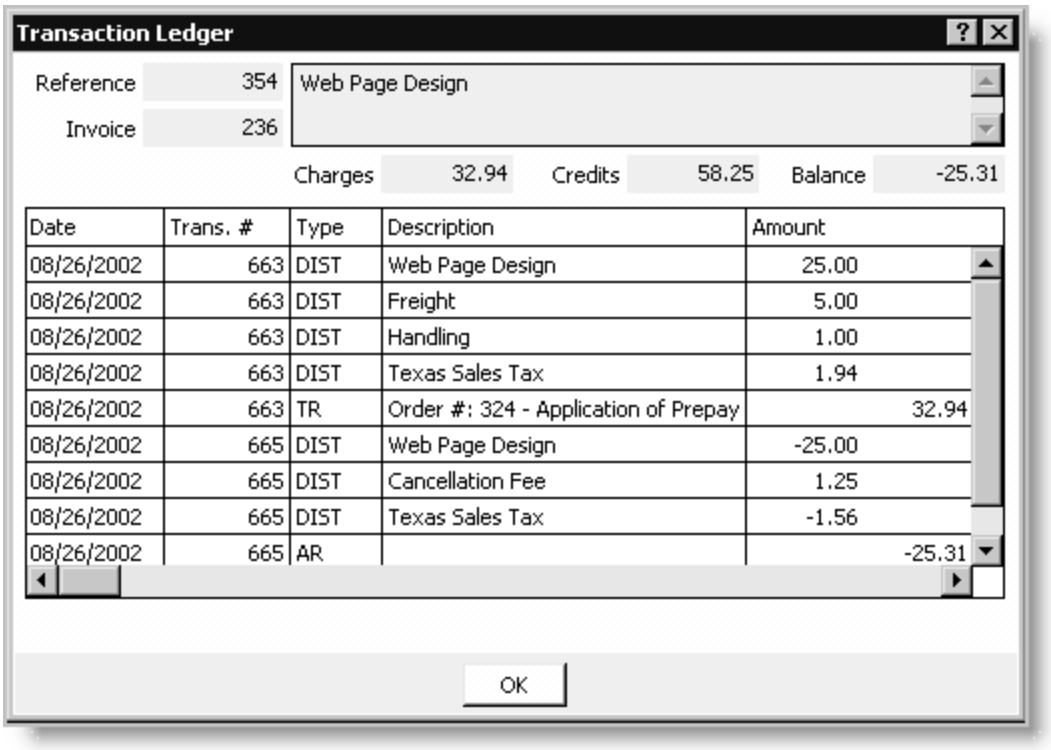
- Select the Order Details tab.
- In the Manual Handling field, enter the handling charge from the original order and press Tab.
- In the Manual Freight field, enter the freight charge from the original order and press Tab.

13. Repeat this process for each of the products on the original order.
14. Click Save.
15. Invoice the order (see "Generating an order invoice").

    To view credit transactions

Because the audit trail would be lost, entering a credit memo order does not update an original, invoiced order. However, you can view all transactions attached to an original invoice number through the AR/Cash Transaction Ledger window.

1. From AR/Cash, select Process month-end procedures to open the Process month-end procedures window.
2. Click Credit Invoices to open the Credit Invoices window.
3. Double-click the invoice for which you want to view all transactions to open the Transaction Ledger window.



Date	Trans. #	Type	Description	Amount
08/26/2002	663	DIST	Web Page Design	25.00
08/26/2002	663	DIST	Freight	5.00
08/26/2002	663	DIST	Handling	1.00
08/26/2002	663	DIST	Texas Sales Tax	1.94
08/26/2002	663	TR	Order #: 324 - Application of Prepay	32.94
08/26/2002	665	DIST	Web Page Design	-25.00
08/26/2002	665	DIST	Cancellation Fee	1.25
08/26/2002	665	DIST	Texas Sales Tax	-1.56
08/26/2002	665	AR		-25.31

Example of the AR/Cash Transaction Ledger window reflecting all transactions for Invoice # 236

Entering debit memo orders

Invoiced orders cannot be edited, so the quantity of products purchased cannot be increased for an invoiced order. Debit memo orders are used to increase the number of products purchased for an original invoiced order. As with a credit memo order, a debit

memo order also is entered against an original order's invoice number. However, because the audit trail would be lost, entering a debit memo order does not update an original, invoiced order.

All transactions attached to an original invoice number can be viewed through the AR/Cash Transaction Ledger window. A Trial Balance report can be printed from the AR/Cash Generate reports window, showing all transactions associated with an order.

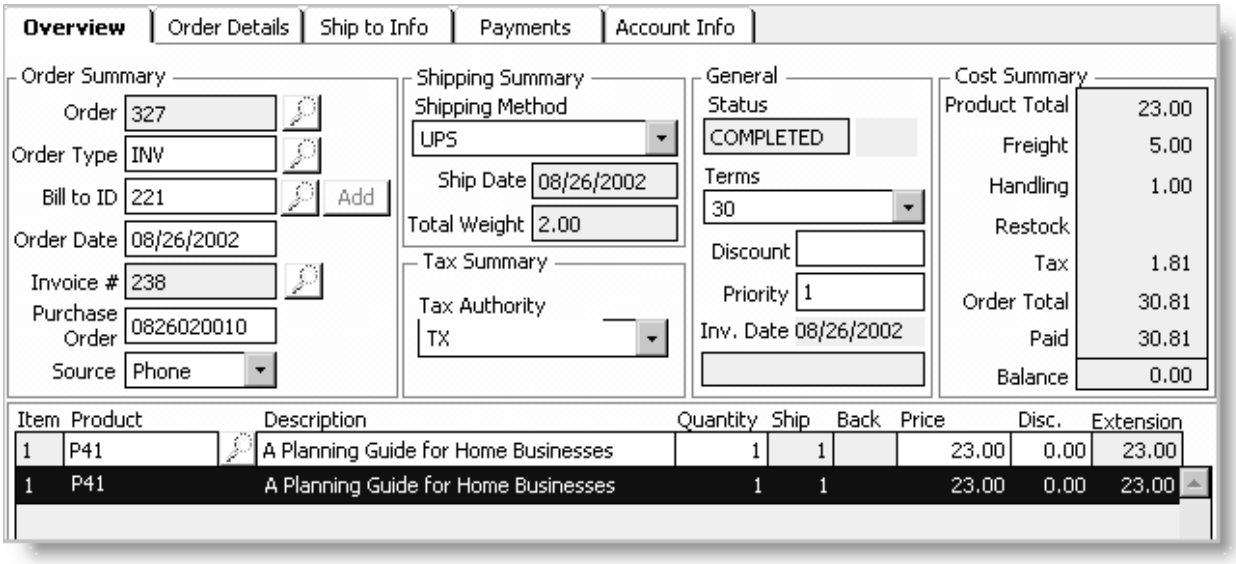
If entering a debit memo for a bad check or credit card payment, setting up an order type specifically for this situation is recommended.

To enter a debit memo order

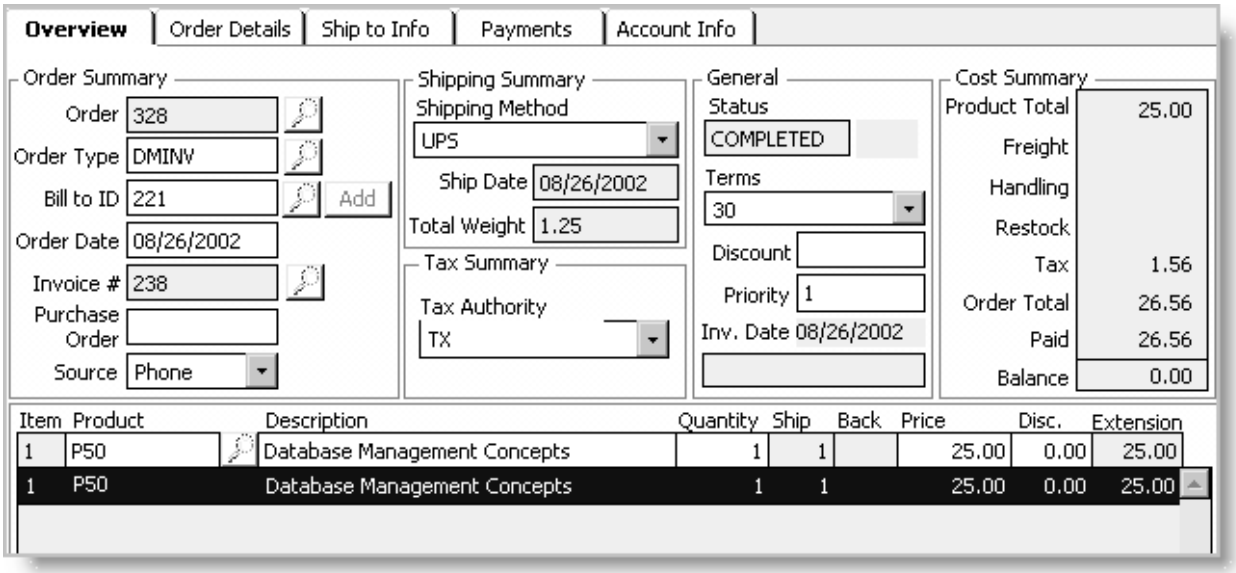
1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click New. The Order Date defaults to the batch date if batch control is used; otherwise, the Order Date defaults to the system date.
3. Enter the debit memo (DMINV) order type in the Order Type field (select the Find icon to look up the order type).
4. Press Tab to go to the Bill to ID field. The Invoice # field enables.
5. Enter the Bill to ID.
6. Override the Order Date if necessary.
7. Enter the original order's invoice number in the Invoice # field (select the Find icon to look up the invoice number).
8. Enter a source code in the Source field.
9. Enter the Product code of the product you want to add to the order.

   If entering a debit memo for a bad check or credit card payment, set up a product code specifically for the bad check or credit card payment.
10. Enter the Quantity of the product you are adding to the order, and press Tab.
11. Repeat this process for each additional product you want to add to the order.

12. Click Save.
13. Invoice the order (see "Generating an order invoice").



Example of an original invoiced order - Invoice # 238

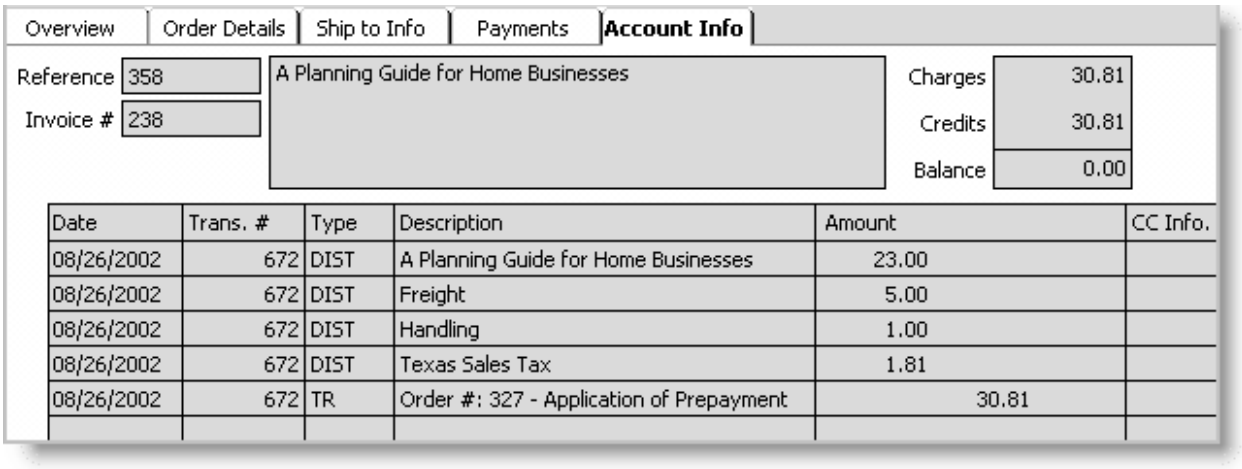


Example of the invoiced debit memo order for Invoice # 238

To view debit transactions

Because the audit trail would be lost, entering a debit memo order does not update an original, invoiced order. However, you can view all transactions attached to an original invoice number through the Enter and edit orders window's Account Info tab.

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Open (see "Finding orders") either the original order or the debit memo order with the same invoice number.
3. Select the Account Info tab listing all transactions for the same invoice number.



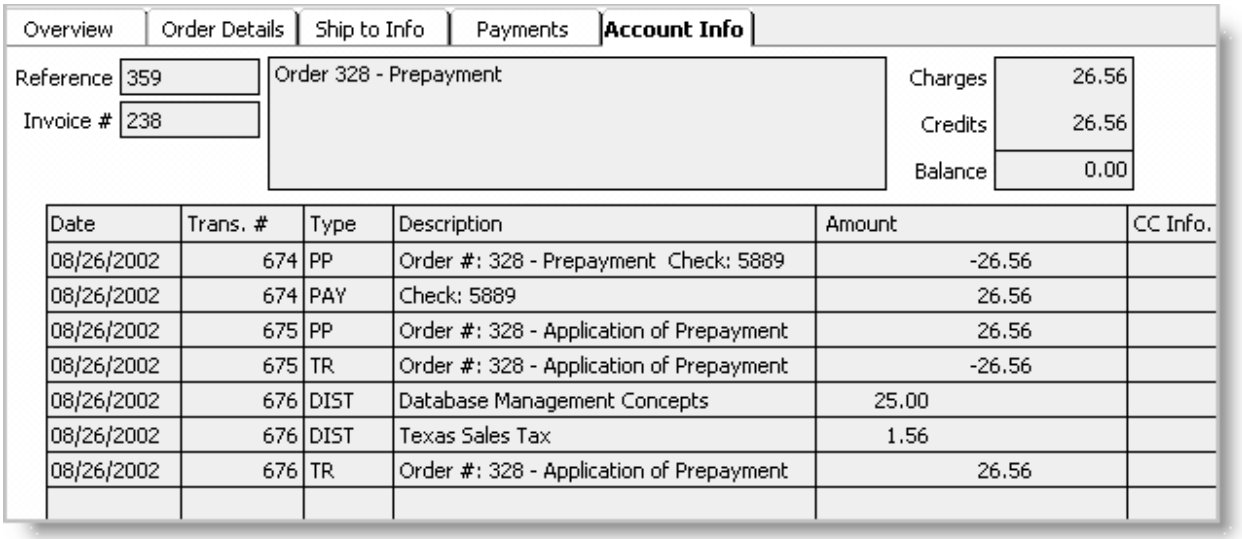
Overview | Order Details | Ship to Info | Payments | **Account Info**

Reference: 358
Invoice #: 238
A Planning Guide for Home Businesses

Charges: 30.81
Credits: 30.81
Balance: 0.00

Date	Trans. #	Type	Description	Amount	CC Info.
08/26/2002	672	DIST	A Planning Guide for Home Businesses	23.00	
08/26/2002	672	DIST	Freight	5.00	
08/26/2002	672	DIST	Handling	1.00	
08/26/2002	672	DIST	Texas Sales Tax	1.81	
08/26/2002	672	TR	Order #: 327 - Application of Prepayment	30.81	

Example of the Account Info tab reflecting an original transaction for Invoice # 238



Overview | Order Details | Ship to Info | Payments | **Account Info**

Reference: 359
Invoice #: 238
Order 328 - Prepayment

Charges: 26.56
Credits: 26.56
Balance: 0.00

Date	Trans. #	Type	Description	Amount	CC Info.
08/26/2002	674	PP	Order #: 328 - Prepayment Check: 5889	-26.56	
08/26/2002	674	PAY	Check: 5889	26.56	
08/26/2002	675	PP	Order #: 328 - Application of Prepayment	26.56	
08/26/2002	675	TR	Order #: 328 - Application of Prepayment	-26.56	
08/26/2002	676	DIST	Database Management Concepts	25.00	
08/26/2002	676	DIST	Texas Sales Tax	1.56	
08/26/2002	676	TR	Order #: 328 - Application of Prepayment	26.56	

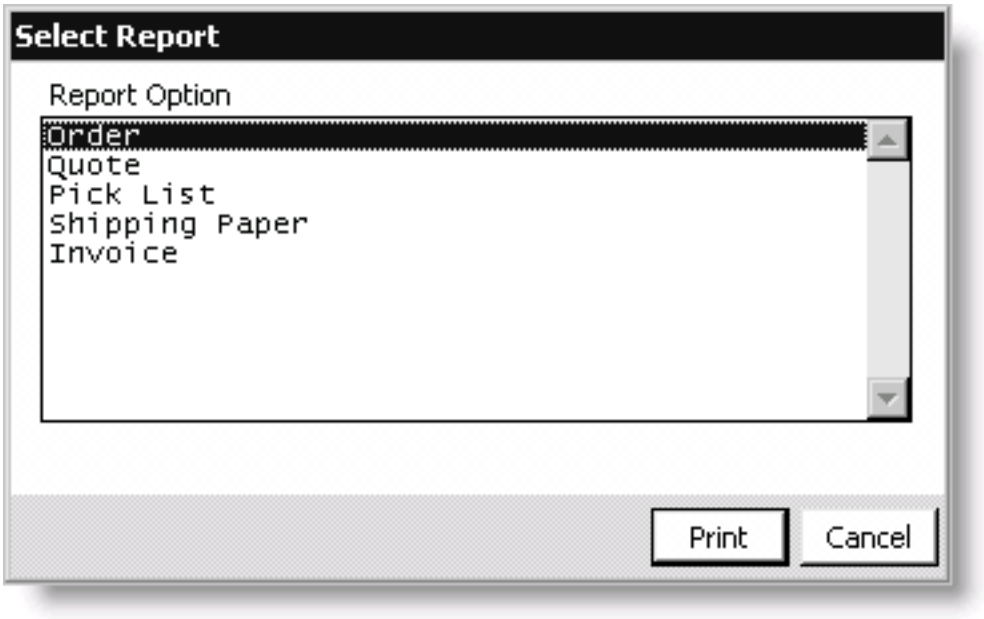
Example of the Account Info tab reflecting a debit memo order for Invoice # 238 - Note that additional freight and handling charges were not incurred for the additional product

Printing order-specific reports

iMIS allows you to print reports for specific orders. Depending on the stage of the order process, you can print a copy of the order as well as quotes, pick lists, shipping papers, and invoices. These reports are accessed through the Select Report window, which opens when you click Print.

In addition, you can move orders through the order processing stages using the Print button.

Select Report window for Orders



From Orders, select Enter and edit orders, open or enter an order, and click Print

Report Option

Lists the reports or processing options that you can select for the current order depending on its processing stage. For example, you cannot print a shipping paper until you process an order through the shipping paper stage.

- Order - Select this option to print an Order Detail report.
- Quote - Select this option to print an order's Quotation. Optional: Convert the order to QUOTEREADY status.
- Convert Quote - Select this option to convert a quote to an order.
- Pick List - Select this option to print an order's Pick List. Optional: Convert the order to SHIPPAPER status.
- Shipping Paper - Select this option to print an order's Packing Slip. Optional: Convert the order to SHIPMENT status.
- Ship Order - Select this option to convert an order to INVOICE status.
- Invoice - Select this option to print an order's Invoice and convert order status to COMPLETED.

  Print button

  Click to print the selected report.

  To print an order-specific report

1. Select File > Report Destination, and select the destination for the report.
2. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
3. Open the order (see "Finding orders") for which you want to print a report.
4. Click Print to open the Select Report window.
5. Select the report you want to print from the Report Option list.
6. Click Print to print the report.

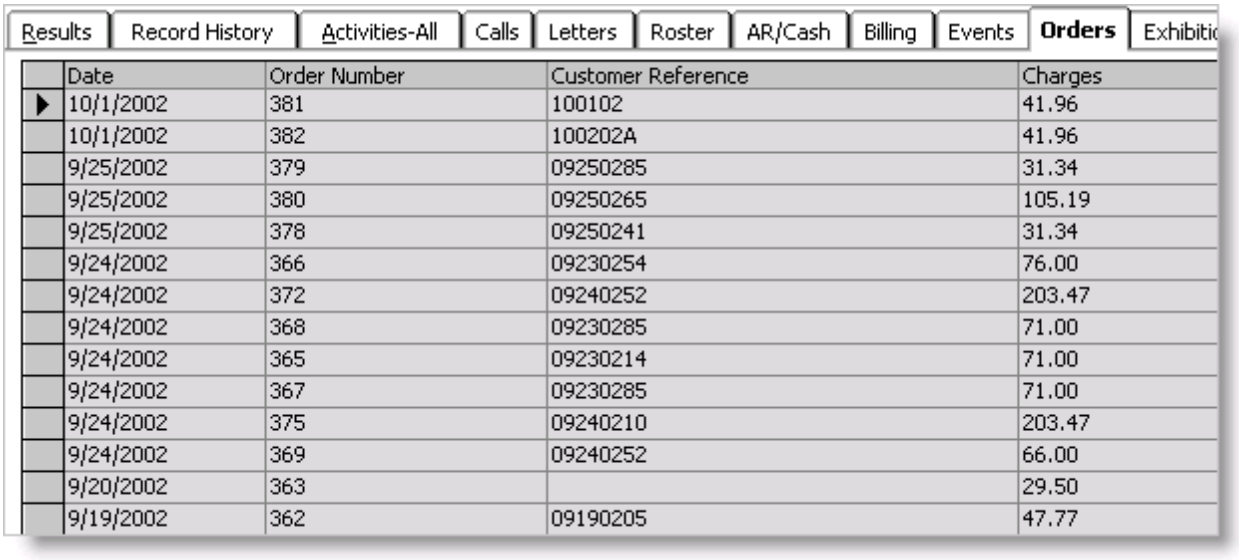
Accessing the Orders feature from Customers

You can access the Orders feature from the Manage customers window's Orders tab. The Orders tab allows you to find and view customers' open and invoiced orders. You can

open the Enter and edit orders window for a customer directly from the Orders tab by clicking New Order.

The Orders tab's Current view displays a list of all open orders. Double-clicking an open order while in the Current view opens the order on the Enter and edit orders window where you can edit and view the selected order. The History view displays a list of all invoiced orders. Double-clicking an invoiced order while in the History view opens the Activity Detail window.

Manage customers window - Orders tab (Current view)



Date	Order Number	Customer Reference	Charges
10/1/2002	381	100102	41.96
10/1/2002	382	100202A	41.96
9/25/2002	379	09250285	31.34
9/25/2002	380	09250265	105.19
9/25/2002	378	09250241	31.34
9/24/2002	366	09230254	76.00
9/24/2002	372	09240252	203.47
9/24/2002	368	09230285	71.00
9/24/2002	365	09230214	71.00
9/24/2002	367	09230285	71.00
9/24/2002	375	09240210	203.47
9/24/2002	369	09240252	66.00
9/20/2002	363		29.50
9/19/2002	362	09190205	47.77

From Customers, select Manage customers, open a customer record, select the Orders tab, and click Current

Date

Displays the date of the order.

Order Number

Displays the order number.

Customer Reference

Displays the value entered in the Purchase Order field on the Enter and edit orders window.

Charges

Displays the total charges for the order.

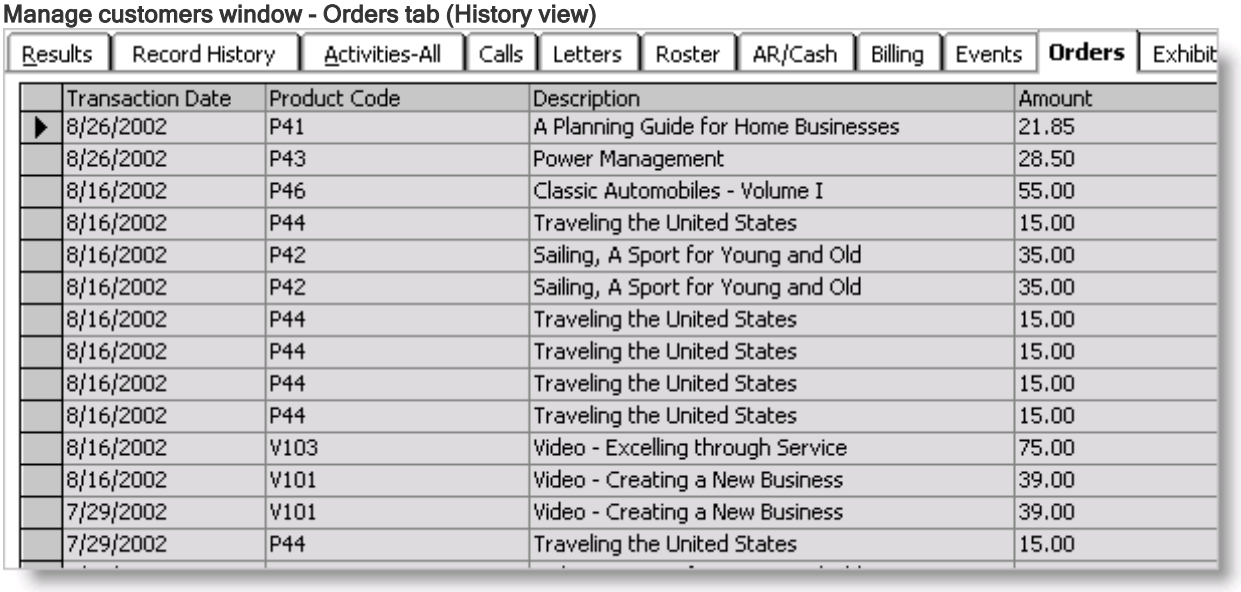
New Order button

Opens the Enter and edit orders window and enter an order.

History button

(Not shown in example) Click to toggle between viewing current open orders and historical invoiced orders.

Manage customers window - Orders tab (History view)



Transaction Date	Product Code	Description	Amount
8/26/2002	P41	A Planning Guide for Home Businesses	21.85
8/26/2002	P43	Power Management	28.50
8/16/2002	P46	Classic Automobiles - Volume I	55.00
8/16/2002	P44	Traveling the United States	15.00
8/16/2002	P42	Sailing, A Sport for Young and Old	35.00
8/16/2002	P42	Sailing, A Sport for Young and Old	35.00
8/16/2002	P44	Traveling the United States	15.00
8/16/2002	P44	Traveling the United States	15.00
8/16/2002	P44	Traveling the United States	15.00
8/16/2002	P44	Traveling the United States	15.00
8/16/2002	V103	Video - Excelling through Service	75.00
8/16/2002	V101	Video - Creating a New Business	39.00
7/29/2002	V101	Video - Creating a New Business	39.00
7/29/2002	P44	Traveling the United States	15.00

From Customers, select Manage customers, open a customer record, select the Orders tab, and click History

Transaction Date

Displays the date of the transaction.

Product Code

Displays the code for the purchased product.

Description

Displays a description of the product.

Amount

Displays the amount of the order.

New Order button

Opens the Enter and edit orders window and enter an order.

Current button

(Not shown in example) Click to toggle between viewing historical invoiced orders and current open orders.

To access the Orders module from Customer Portfolio

1. From Customers, select Manage customers to open the Customer Portfolio.
2. Open a customer record.
3. Select the Orders tab. The Current view displays by default.
4. To access the Orders module, do one of the following:

- Click New Order to open the Enter and edit orders window for the customer. When you click New on the Enter and edit orders window, the customer's ID automatically populates the Bill to ID field.
- Double-click the gray box to the left of the Date field to open the customer's selected order in Enter and edit orders window. You then can view or edit the customer's order.

To access the Customer Portfolio from the Orders module

You can go directly to a customer's Customer Portfolio record from that customer's order in the Orders module.

1. Open a customer order.
2. Click Customers.

The customer record is displayed in the Customer Portfolio.

Viewing order activities

Order activity records are created each time you invoice a customer's order. When an order is invoiced and the activity record is created, the quantity of each individual product ordered populates the Activity.QUANTITY field. The total product quantity of the order populates the Orders.TOTAL_QUANTITY_ORDERED field.

If you enable the Create Activity Records for Zero Dollar Orders option on the AR/Cash Set up module window, activity records also will be created for zero dollar orders. If you are using batch control and the Separate Posting Cycle Required option is enabled on the AR/Cash Batch Control window, order activity records will be created when you post a batch.

You can view a customer's order activities through the Manage customers window's Activities-All tab. Double-clicking an order activity opens the Activity Detail window.

> **Note:** Tip: For details about the Activities-All tab fields, see Manage customers window - Activities-All tab in the Customers section.

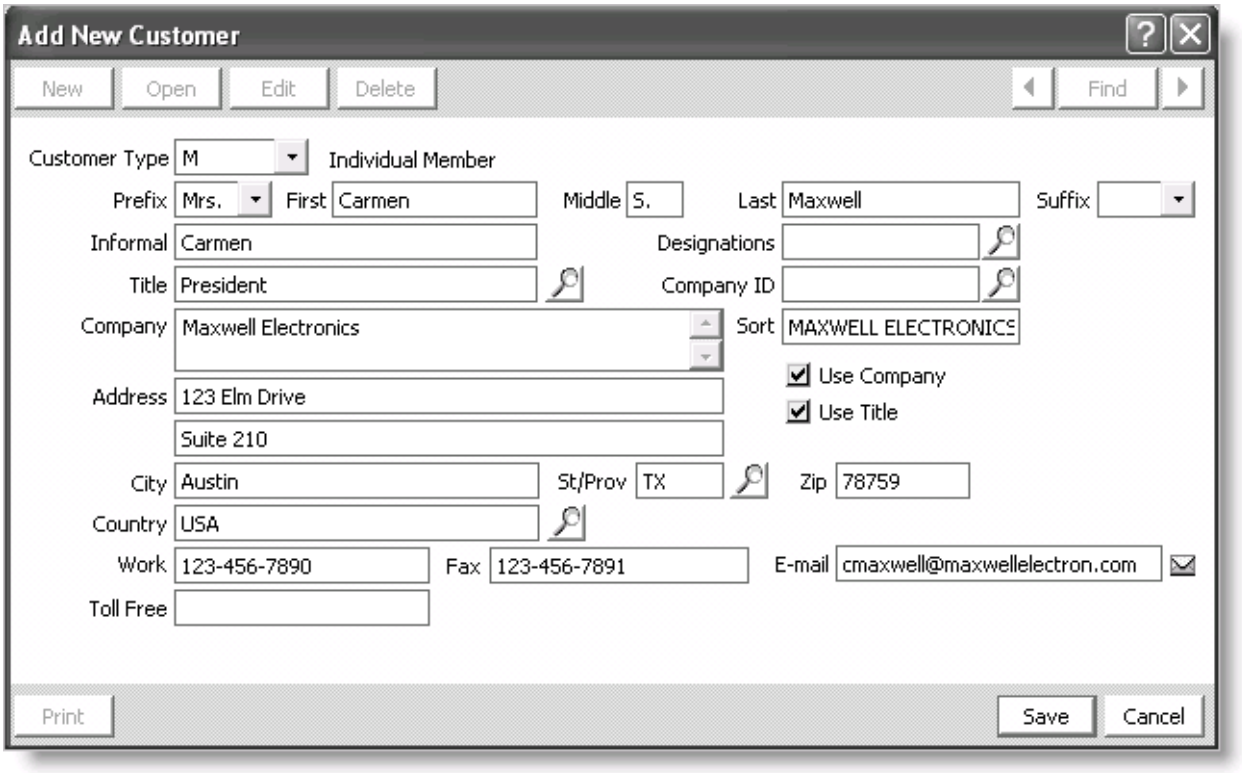
To view customer order activities

1. From Customers, select Manage customers to open the Manage customers window.
2. Open a customer record.
3. Select the Activities-All tab.
4. Select Order from the Activities drop-down list. All of the customer's order activities display on the tab.
5. Double-click an order activity to open it in the Activity Detail window.

Adding new customers during order entry

iMIS Orders allows you to add a new customer to your database during order entry. Enter name and address information on the Add New Customer window, and then continue to process the order.

Add New Customer window



From Orders, select Enter and edit orders, enter an order, and click Add

Customer Type

(required) Select a customer type for the new customer's record. The Customer Type field requires population before any other fields on the Add New Customer window can be populated.

Type

(Read only) Displays the customer type selected.

Prefix

Select a prefix for a customer, such as Mr., Ms., or Dr.

First

Enter a customer's first name.

Middle

Enter a customer's middle name.

Last

Enter a customer's last name.

Suffix

Select a suffix for a customer, such as Jr., Sr., or III.

Informal

(Defaults to the name entered in the First field) Enter a customer's informal name or nick-name.

Designations

Enter a customer's professional designations, such as CPA, Ph.D., or MD; select the Find icon to look up a designation.

Title

Enter a customer's professional title or position; select the Find icon to look up a title.

Company ID

Enter a customer's company ID; select the Find icon to look up an ID.

Company

Enter a customer's company name; select the Find icon to look up a company.

Sort

Specify a value by which you want to sort a company record (Name.COMPANY_SORT). iMIS automatically removes the first instance of the word “The” from a company name.

Use Company

Select to print the company name on reports.

When adding new records during product orders, iMIS automatically sets this option to equal the Main address field's settings on the Customer Setup - Address and Notes

window. If you override the settings on the Add New Customer window while adding a new customer record, these changes are copied to the Ship to Info tab, which affects the Ship To address but does not affect the Bill To address.

> **Note:** Note: The label for the Use Company option is customizable, so your system may display another label for this option. The value entered in the Institute Type field on the Customer Setup - Basic Options window defines the option's label.

Use Title

Select to print the customer title on reports.

When adding new records during product orders, iMIS automatically sets this option to equal the Main address field's settings on the Customer Setup - Address and Notes window. If you override the settings on the Add New Customer window while adding a new customer record, these changes are copied to the Ship to Info tab, which affects the Ship To address but does not affect the Bill To address.

Address

Use these two fields to enter a customer's street address.

City

Enter a customer's city.

St/Prov

Enter a customer's state or province; select the Find icon to look up a state or province.

Zip

(Accepts up to nine characters) Enter a customer's ZIP code.

Country

(Leave blank to accept the default) Enter a customer's country; select the Find icon to look up a country.

Work

Enter a customer's work telephone number.

Fax

Enter a customer's fax number.

E-mail

Enter a customer's e-mail address.

Print button

Disabled.

To add a new customer during order entry

1. From Orders, select Enter and edit orders to open the Enter and edit orders window. The Overview tab displays by default.
2. Click New.
3. Enter an Order Type (select the Find icon to look up an order type), and press Tab to go to the Bill to ID field.
4. Click Add to open the Add New Customer window.
5. Enter the relevant customer information.
6. Click Save to add the customer to the database, and continue entering the customer's order.

Order Processing

In iMIS Orders, you process each order through stages to completion. There are several possible order stages, but the number and type of stages through which an order is processed depends on the order's type. Different order types require different processing stages. For example, a pro forma order (quote) is processed through a maximum of two stages after being entered: Print quotes and, if requested, Convert quotes which converts a pro forma order quote to an actual product order.

Using order processing

The order processing stages are accessed from the Process orders sub-task list (from Orders, select Process orders). Each sub-task list item opens a window used in processing an order to completion. Each processing window lists the orders that are at that stage of the order process. If an order processing window is empty, it means only that no orders are at that processing stage, not that active orders are not in the system.

Regardless of an order's status, orders placed on hold do not appear on the order processing windows. For more information about orders placed on hold, see Entering Order Details Tab Information (see "Entering order details information").

Process orders sub-task list

> **Note:** Note: From Orders, select Process orders.

All order processing stages except Ship orders generate printed output, and this generated data is separate from Orders reports. Regardless of whether you generate printed data, each order must proceed through the stages defined for its specific order type.

These are the order processing stages:

Print quotes

(Used only with pro forma orders) Select to open the Print quotes window used for generating selected sales quotes. The Print quotes option is for printing only; it does not affect product inventory or account status. You can generate sales quotes and then e-mail, fax, or mail the quotes to customers requesting them.

Convert quotes

(Used only with pro forma orders) Select to open the Convert quotes window used for converting pro forma order quotes to actual product orders. The Convert quotes order stage is the second order stage following Print quotes for pro forma orders.

The Convert quotes stage automatically converts pro forma orders to an actual order with the appropriate order type. You specify which order type pro forma orders convert to in the Convert to Order Type field on the Order Status Defaults window (from Orders, select

Set up module, and click Order Staging). A converted order then reenters the staging process at the correct order stage defined for that order type.

Print pick list

Select to open the Print pick list window used for generating an itemized product list known as a Pick List. A Pick List sorts items by warehouse location and product. Separate print lists print per bin if you are using bins.

Print shipping papers

Select to open the Print shipping papers window used for generating a shipping paper known as a Packing Slip. These shipping papers, which detail an order's contents and 'Ship to' information, are packaged with each product shipment.

Ship orders

Select to open the Ship orders window used for recording actual shipping dates, shipping methods, and shipped quantities of orders. The Ship orders processing stage is the only order processing stage that does not generate printed output.

Invoice orders

Select to open the Invoice orders window used for posting (invoicing) selected order sales transactions to AR/Cash. Invoicing an order generates an order Invoice. You cannot edit or delete orders once you invoice them.

Close orders

(optional) Select to open the Close orders window used for marking COMPLETED orders as CLOSED.

Manually release backorders

Select this option to open the Manually release backorders window used for releasing orders with a BACKORDER status. This reverses the BACKORDER status and removes the backorder from the queue of orders awaiting inventory. The order is returned to the appropriate order processing stage automatically unless shipping papers have been generated.

You can release backorders manually even if the Automatic Backorder Processing option is enabled on the Backorder Processing window (from Orders, select Set up module, and click Backorders).

Converting orders

Each order processing window lists any orders currently at that order processing stage. Each conversion process moves an order to its next succeeding order processing stage, and you convert each order through its appropriate stages until the order is complete.

Order type determines the number and type of stages an order goes through in processing. Different order types require different processing stages.

All Orders Have a Status of

(read only) Displays the order processing stage.

Order #

(read only) Displays the order number.

Batch #

(read only) Displays an order's batch number if batch control was enabled on the AR/Cash Batch Control window (from AR/Cash, select Set up module, and click Batch Control) when the order was entered.

Type

(read only) Displays the order type.

Date

(read only) Displays the order date. If batch control is enabled, the batch date displays.

Customer

(read only) Displays the name of the 'Ship to' customer.

Company

(read only) Displays the name of the 'Ship to' company. If necessary, scroll to the right to view this information.

Entered By

(Not shown in example, display only) Displays the individual who entered the order. If necessary, scroll to the right to view this information.

Select

Select from a list of conversion options:

- All - Converts all of the orders at this processing stage.
- None - Converts none of the orders at this processing stage.
- Order # - Converts a specific order number at this processing stage. Selecting this option opens a window used for entering specific order numbers.
- Order Type - Converts all orders of a specific type at this processing stage. Selecting this option opens a window used for selecting a specific order type.
- Batch # - Converts orders with a specific batch number at this processing stage. Selecting this option opens a window used for entering specific batch numbers. The Batch # option does not display for the Invoice orders processing stage.

> **Note:** Note: To process a group of orders within an order processing window, you can use the traditional GUI bulk selection methods (for example, pressing the Shift or Ctrl keys while selecting an order), or you can choose one of the Select options.

Sort

Select from a list of order sorting options to sort the orders in the window:

- Order # - Sorts by order number.
- Batch Number - Sorts by batch number. The Batch Number option does not display for the Invoice orders processing stage.
- Order Date - Sorts by order date.

- Order Type - Sorts by order type.
- Customer - Sorts by customer last name.
- Company - Sorts by company name.
- Entered By - Sorts by who entered the orders.

Convert button

Click to complete the processing stage for the selected order(s) and to generate the appropriate printout. Each conversion process moves an order to the next succeeding order processing stage configured for the order type.

To convert an order

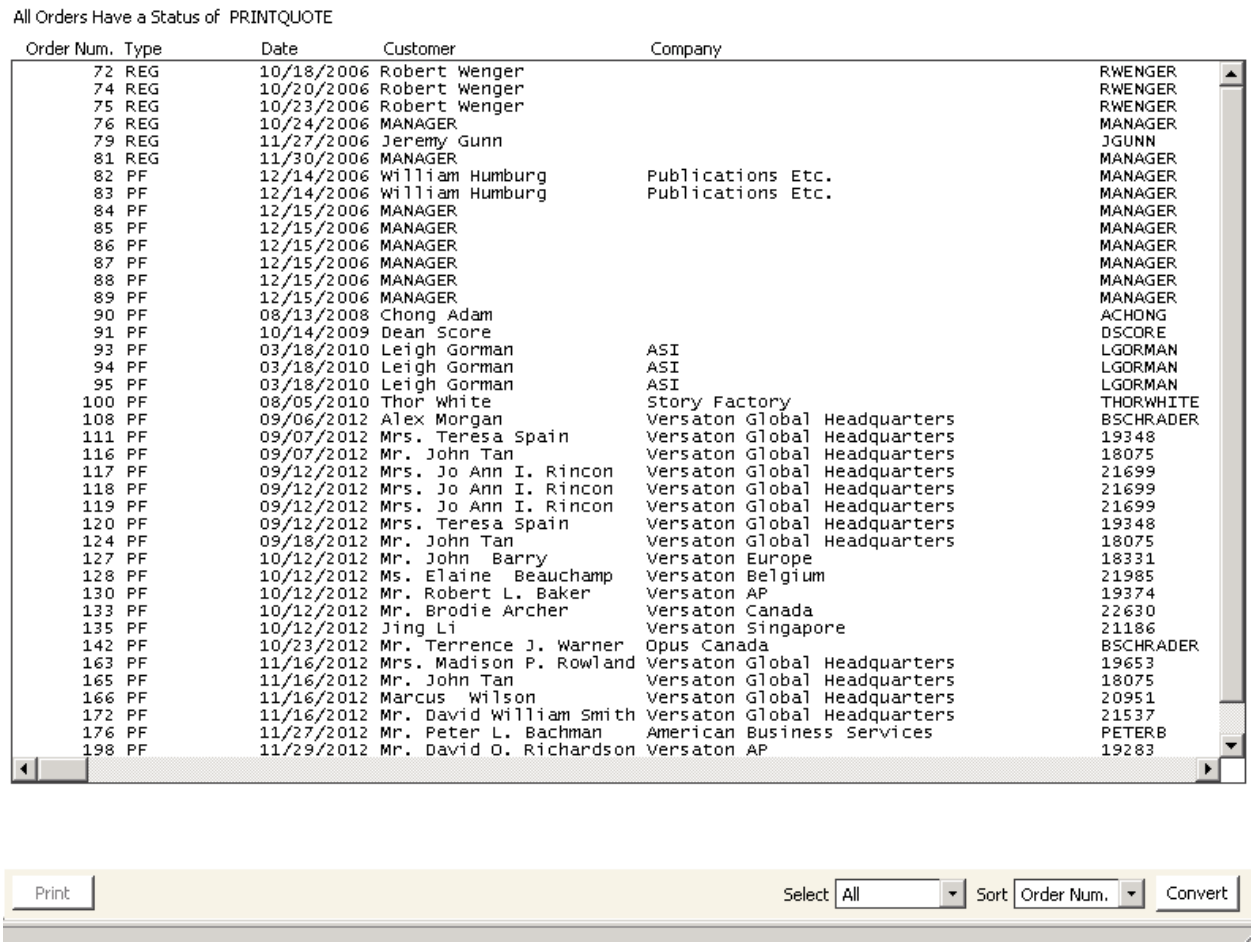
1. Enter an order (see "Entering orders").
2. From Orders, select Process orders to view the Process orders sub-task list.
3. Select the appropriate order processing stage to open that stage's order processing window.
4. Select the order(s) you want to convert to the next stage.
5. Click Convert. A message displays prompting you to confirm converting to the appropriate order type.
6. Click Yes to convert the order.

Printing sales quotes

The Print quotes option is used for printing sales quotes. Used only for pro forma orders, the Print quotes option allows you to print sales quotes without affecting product inventory or account status. You can generate sales quotes and then e-mail, fax, or mail the quotes to customers requesting them.

Sales quotes sort by order number and line item number, and any user defined fields populated for an order line item on the Product Detail window will print below each line item on a sales quote.

Print quotes window



Admin Console: Home > Commerce > Print quotes

Desktop: Orders > Process orders > Print quotes

To print sales quotes

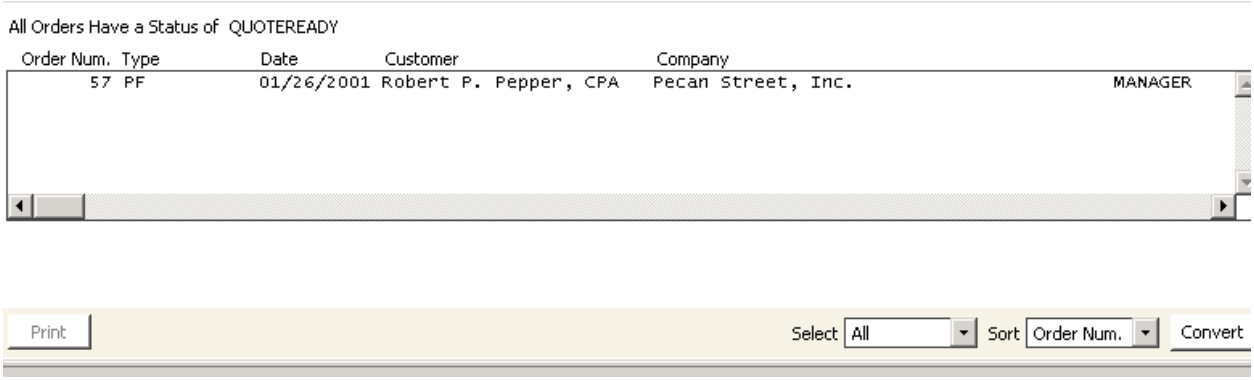
1. Enter a pro forma order (see "Entering orders").
2. From Print quotes window, select the order(s) for which you want to generate sales quotes. To edit an order, double-click it to open it on the Order Entry window.
3. Click Convert. A message displays prompting you to confirm moving the pro forma order (s) to the next stage.
4. Click Yes to convert the order(s) and print the sales quote(s).

Converting quotes

The Convert quotes option is used only with pro forma orders. It is the second order processing stage for pro forma orders following the Print quotes stage and automatically converts pro forma orders to actual orders.

You determine which order type pro forma orders convert to in the Convert to Order Type field on the Order Status Defaults window (from Orders, select Set up module, and click Order Staging). A converted order then enters the staging process at the correct order processing stage defined for that order type. The Convert quotes option does not generate printed data.

Convert quotes window



Admin Console: Home > Commerce > Convert quotes
Desktop: Orders > Process orders > Convert quotes

To convert quotes

1. Complete the Print quotes order processing stage for the pro forma order you want to convert. See Printing Sales Quotes.
2. From Convert quotes window, select the order(s) you want to convert. To edit an order before converting it, double-click the order to open it on the Order Entry window.
3. Click Convert. A message displays prompting you to confirm converting to the appropriate order type.
4. Click Yes to convert the quote(s) to the appropriate order type. The Convert quotes option does not generate printed data.

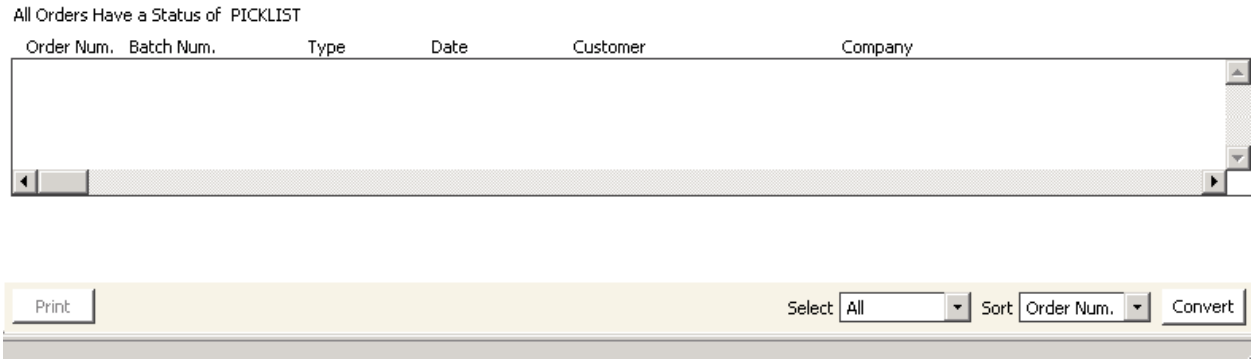
Printing pick lists

The Print pick list option is used for generating an itemized product list known as a Pick List. Pick lists sort products by product code, order number, and line number, and each product code prints on a separate page. Any user defined fields populated for an order line item on the Product Detail window will print below each line item on a pick list.

If the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory), products also sort by warehouse and bin. Each product code prints on a separate page, and if a product is ordered from multiple warehouses, a pick list then will sort each product code by warehouse; a separate page will print for each warehouse.

A product's warehouse Location Code prints at the top of a pick list. If a bin is defined for a warehouse, the Bin location prints next to a product line-item on a pick list.

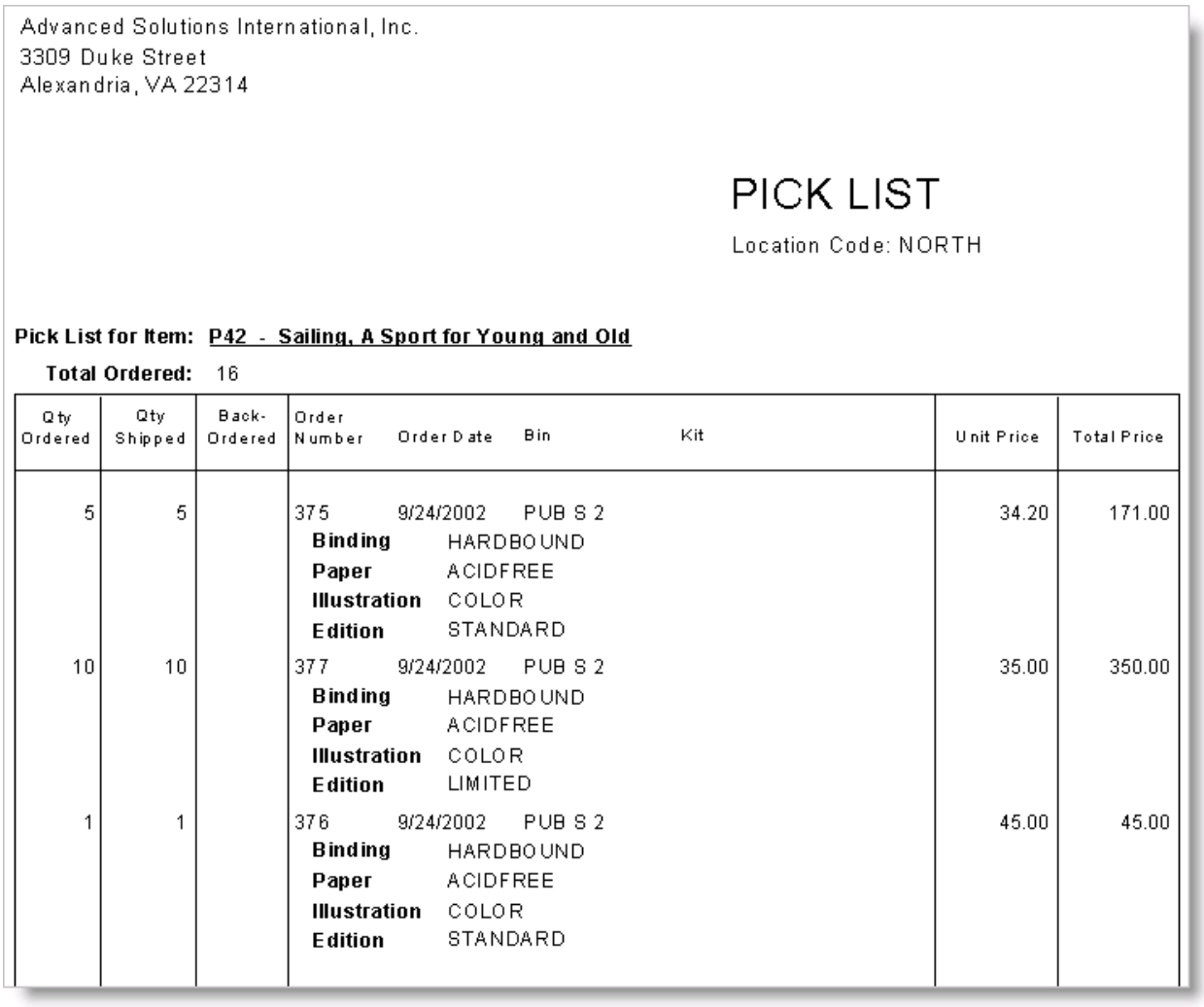
Print pick list window



Admin Console: Home > Commerce > Print pick list
Desktop: Orders > Process orders > Print pick list

To print a pick list

1. From Print pick list window, select the order(s) for which you want to generate pick lists. To edit an order, double-click it to open the order on the Order Entry window.
2. Click Convert. A message displays prompting you to confirm printing the pick lists.
3. Click Yes to print the pick lists. A pick list will print for each individual item.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

PICK LIST

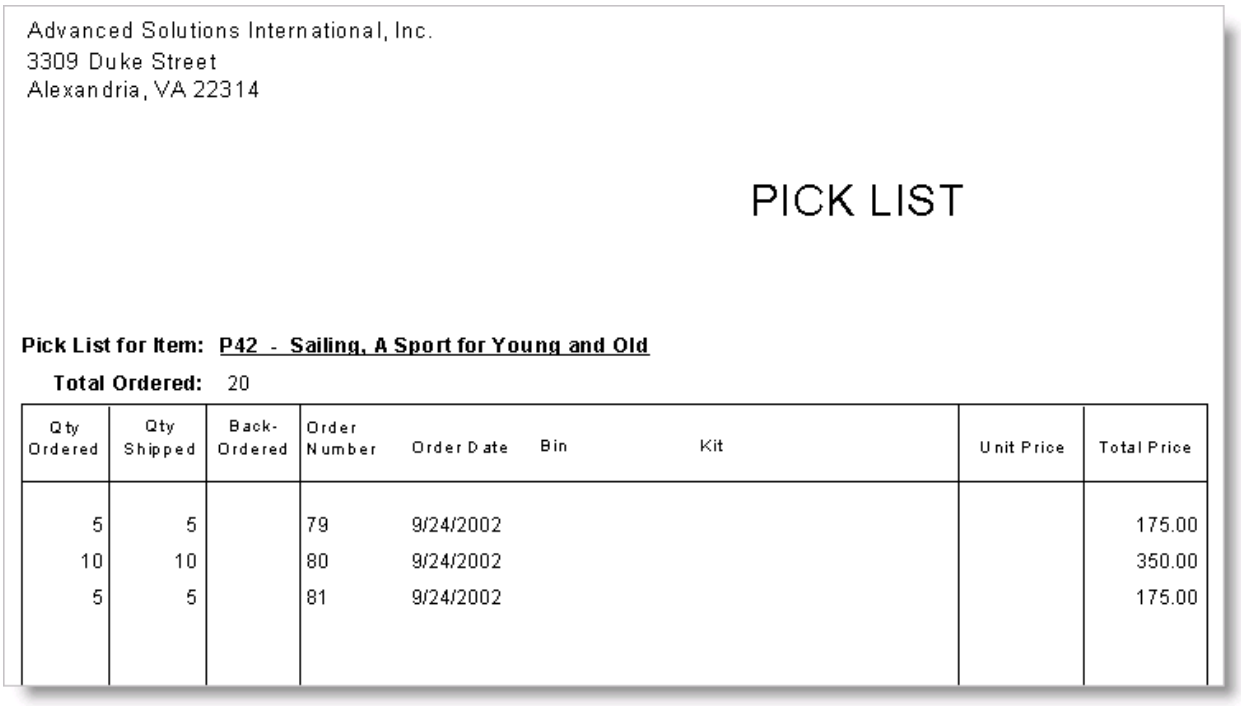
Location Code: NORTH

Pick List for Item: P42 - Sailing, A Sport for Young and Old

Total Ordered: 16

Qty Ordered	Qty Shipped	Back-Ordered	Order Number	Order Date	Bin	Kit	Unit Price	Total Price
5	5		375	9/24/2002	PUB S 2		34.20	171.00
			Binding HARDBOUND					
			Paper ACIDFREE					
			Illustration COLOR					
			Edition STANDARD					
10	10		377	9/24/2002	PUB S 2		35.00	350.00
			Binding HARDBOUND					
			Paper ACIDFREE					
			Illustration COLOR					
			Edition LIMITED					
1	1		376	9/24/2002	PUB S 2		45.00	45.00
			Binding HARDBOUND					
			Paper ACIDFREE					
			Illustration COLOR					
			Edition STANDARD					

Example of a Pick List for item P42 - Multi-Warehouses enabled; note the user-defined fields



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3309 Duke Street
Alexandria, VA 22314

PICK LIST

Pick List for Item: P42 - Sailing, A Sport for Young and Old

Total Ordered: 20

Qty Ordered	Qty Shipped	Back-Ordered	Order Number	Order Date	Bin	Kit	Unit Price	Total Price
5	5		79	9/24/2002				175.00
10	10		80	9/24/2002				350.00
5	5		81	9/24/2002				175.00

Example of a Pick List for item P42 - Multi-Warehouses disabled

Printing shipping papers

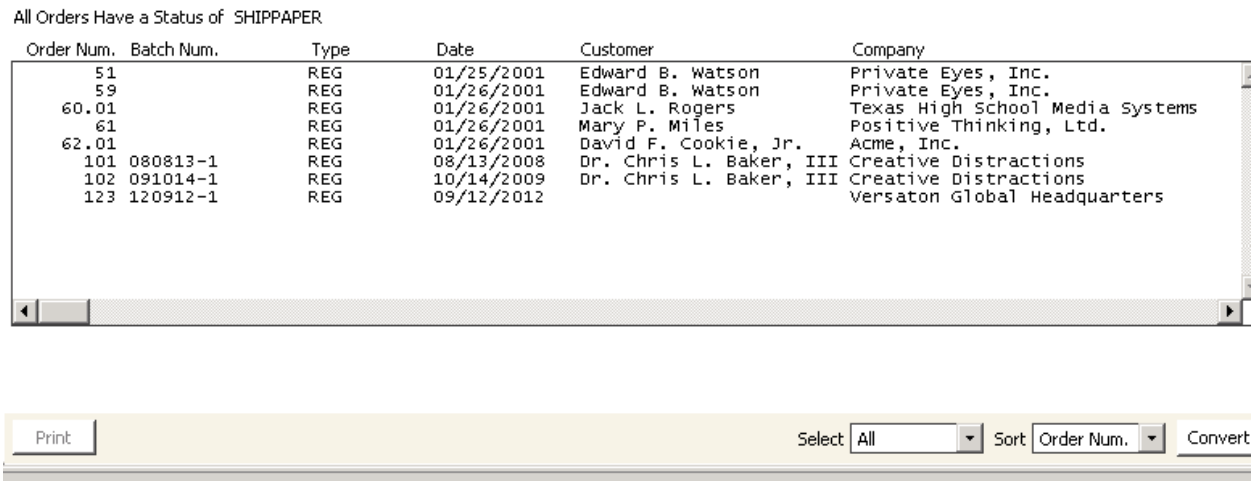
The Print shipping papers option is used for generating a shipping paper known as a Packing Slip. Shipping papers generate for individual orders and detail order 'Ship to', Sold To, and content information; each order should ship with shipping papers.

Any user defined fields populated for an order line item on the Product Detail window will print below each line item on a shipping paper. If the Enable Multi-Warehouses option is enabled on the Inventory System Setup window (from Orders, select Set up module, and click Inventory), shipping papers sort by order number, warehouse, and line number.

If the warehouse location changes for an individual product, that product's order information prints on a separate page. The Warehouse location prints at the top of a shipping paper, and, if a bin is defined for a warehouse, the Bin location prints next to the product line-item. In addition, order quantity totals will not print on shipping papers when the Enable Multi-Warehouses option is enabled.

Shipping papers also sort product kits by warehouse location when the Enable Multi-Warehouses option is enabled. A product kit will print on one page, and the kit's items will sort and print on separate pages depending on warehouse location. For example, a product kit consists of four items. Three items are from the Default warehouse, and the fourth item is from the North warehouse. The three items from the Default warehouse will print on one page, and the fourth item from the North warehouse will print on a separate page.

Print shipping papers window



Admin Console: Home > Commerce > Print shipping papers
Desktop: Orders > Process orders > Print shipping papers

To print shipping papers

1. From Print shipping papers window, select the order(s) for which you want to print shipping papers. To edit an order, double-click it to open the order on the Order Entry window.
2. Click Convert. A message displays prompting you to confirm printing the shipping papers.
3. Click Yes to print the shipping papers. The following is a sample shipping paper:

> **Note:** Note: If you are converting multiple shipping papers and screen is the report destination, canceling the job before all shipping papers are processed will cause errors. These errors will occur for every shipping paper that was not processed,

and the unprocessed shipping papers will not print. However, each order still will proceed to the Ship orders stage.

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Packing Slip

Warehouse: S

Sold To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
P.O. Box 8765
Dallas, TX 75206-8765

Ship To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Phone Number: (214) 445-6734

Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	Shipping Method
110	092502PO	9/25/2002	84	Net 30		UPS

Qty Ordered	Qty Shipped	Back-Ordered	Item Code Description	Unit Price	Extended Price
6	6		P42 Bin: PUB S 54 Sailing, A Sport for Young and Old **Binding** HARDBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** LIMITED		241.50
5	5		P42 Bin: PUB S 54 Sailing, A Sport for Young and Old **Binding** SOFTBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** STANDARD		166.25

Line Item Total	Freight	Handling	Restocking/ Cancellation Fee	Tax	Subtotal	Amount Received	Amount Due

Example of a Packing Slip - Multi-Warehouses enabled

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

PACKING SLIP

Ship To: Wayne Courtland
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Sold To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
P.O. Box 8765
Dallas, TX 75206-8765

Phone #: (214) 445-6734

Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	Total Weight
110		07/01/2002	196	30 Days		0.50

Qty Ordered	Qty Shipped	Back-Ordered	Item Code Description	Unit Price	Extended Price
1	1		V101 Video - Creating a New Business	39.00	39.00
1	1		V102 Video - Is Fast Food Franchising for YOU!	59.90	59.90

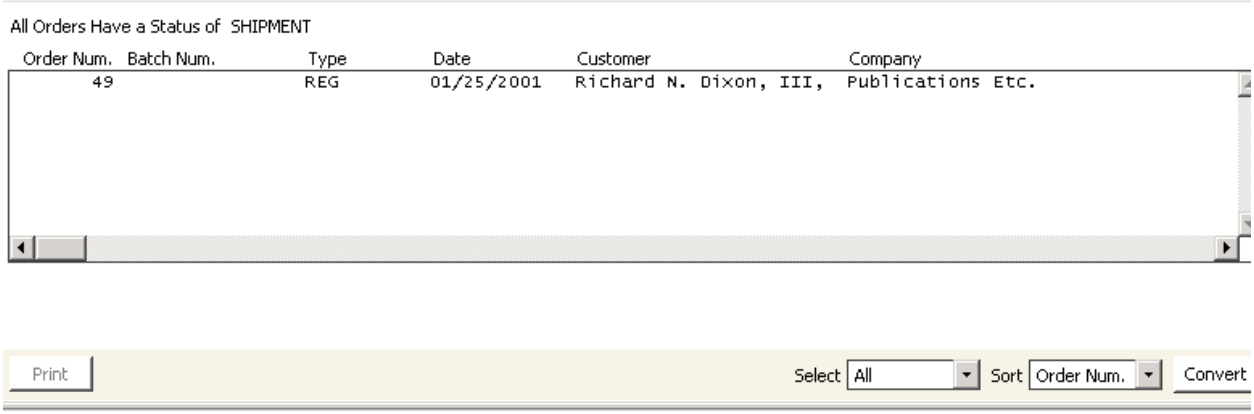
Line Item Total	Freight	Handling	Other	Tax	Subtotal	Amount Received	Amount Due
98.90	5.00	1.00	0.00	6.56	111.46		111.46

Example of a Packing Slip - Multi-Warehouses disabled; pricing information displays only if the Show Prices On Shipping Paper option is enabled on the Order Status Defaults window (from Orders, select Set up module, and click Order Staging)

Shipping orders

The Ship orders option is used for shipping orders and is the only order processing stage that does not generate printed output. At this order processing stage, you can open the Ship Order window to record an order's actual shipping date and shipping method. The Ship Order window also allows you to edit freight and handling charges and the quantity of items shipped.

Ship orders window



Admin Console: Home > Commerce > Ship orders
Desktop: Orders > Process orders > Ship orders

Order Number

(read only) Displays the number assigned to an order.

Order Date

(read only) Displays the date of an order.

PO

(read only) Displays the purchase order number of an order, if any.

Ship To

(read only) Displays the name and address of the customer to whom an order is shipping.

Ship Date

(Defaults to the system date and time) Enter an order's shipping date and time.

Ship Method

Enter an order's shipping method. Select the Find icon to look up a shipping method.

Shipping methods are defined on the SHIP_METHOD lookup/validation tables (from Customers, select Set up tables > lookup/validation).

Freight

Add a freight charge or override the automatic freight charges generated for an order. You can override a Freight amount by entering a value and pressing Tab; the Auto Calc Freight option will disable.

Auto Calc Freight

This option enables automatically if the Automatic Calculation of Freight Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Handling

Add a handling charge or override the automatic handling charges generated for an order. You can override a Handling amount by entering a value and pressing Tab; the Auto Calc Handling option will disable.

Auto Calc Handling

This option enables automatically if the Automatic Calculation of Handling Charge option is enabled on the Add-on Charges window (from Orders, select Set up module, and click Add-on Charges).

Line

(read only) Displays the line number of an order.

Product

(read only) Displays the product codes of the items ordered.

Description

(read only) Displays the product descriptions of the items ordered.

Order

(read only) Displays the quantity of the items ordered.

Ship

Enter the quantity of items shipped.

Back

Enter the quantity of items on back order.

To ship an order

1. From Ship orders window, select the order(s) you want to ship.
2. Click Convert. A message displays prompting you to confirm marking the selected order (s) as shipped.
3. Click Yes. The Shipment Express window opens.
4. If you want to cancel shipping the order, use the following steps:

- Click Cancel. A message displays stating that express shipping was canceled.
- Click OK to cancel shipping the order and return to the Ship orders window.

5. (optional) Edit the Ship Date and/or Ship Method, if necessary.
6. Click OK. A message displays prompting you to remove any previously specified shipping methods.
7. Click No to ship the order, or click Yes to remove any previously specified shipping methods and ship the order.

To edit an order's shipping information

You can view and edit an order's shipping information using the Ship Order window.

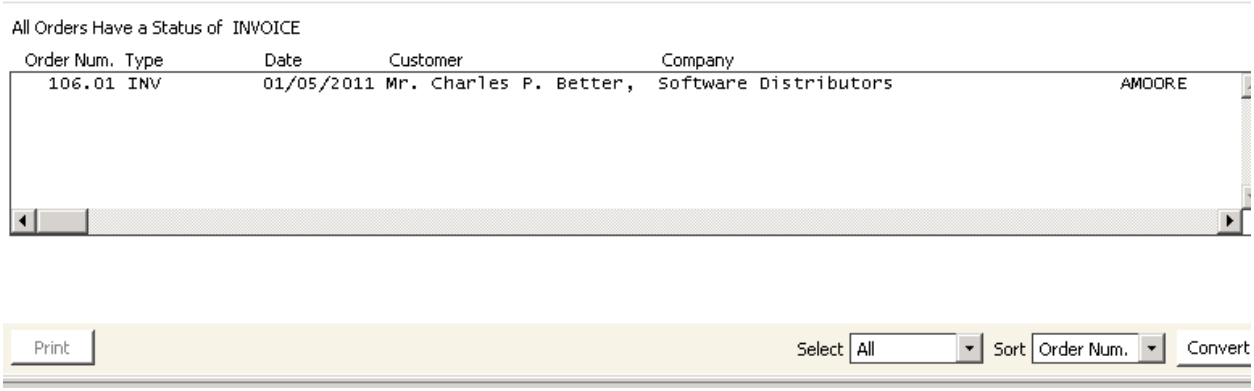
1. From Ship orders window, double-click an order to open the Ship Order window. Detailed information about the selected order displays on the window.
2. Edit the shipping information, if necessary. For example, edit the Ship Date, select a new Ship Method, or override the freight and handling information.
3. Click OK to mark the order as shipped. The order will ship just as if you had selected it and clicked Convert on the Ship orders window.

Generating an order invoice

The Invoice orders option is used for posting selected sales transactions to iMIS AR/Cash. Once you have invoiced an order, the order cannot be edited or deleted.

Generating an order invoice also creates an accounting entry, affects product inventory, and generates an activity record for a customer. If you enable the Create Activity Records for Zero Dollar Orders option on the AR/Cash Set up module window (from AR/Cash, select Set up module), activity records are generated for zero-dollar orders as well.

Invoice orders window



Admin Console: Home > Commerce > Invoice orders
Desktop: Orders > Process orders > Invoice orders

To invoice orders

1. From Invoice orders window, select the order(s) you want to invoice. To edit an order, double-click it to open the order on the Order Entry window.

2. Click Convert. A message displays asking if you want to invoice the order(s) and mark them as completed.
3. Click Yes to invoice the order(s). The Enter Invoice Date window opens.
4. (optional) Edit the invoice date, if necessary.
5. Click OK to invoice the order(s).
6. (optional) If you are using batch control and have enabled the Create New Batch for Invoicing option on the Order Status Defaults window, a message displays stating that a new batch for order invoicing is going to be created by the system.

- Click Yes to continue.

  The Batch # has been created for invoicing message displays with the specified batch number.

- Click OK.

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Invoice No. 23

Invoice

Sold To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
P.O. Box 8765
Dallas, TX 75206-8765

Ship To: Mr. Wayne Courtland
President
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	Shipping Method
110	092502PO	9/25/2002	84	Net 30	9/25/2002	United Parcel Service

Qty Ordered	Qty Shipped	Back-Ordered	Item Code Description	Unit Price	Extended Price
6	6		P42 Sailing, A Sport for Young and Old **Binding** HARDBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** LIMITED	40.25	241.50
5	5		P42 Sailing, A Sport for Young and Old **Binding** SOFTBOUND **Paper** ACIDFREE **Illustration** COLOR **Edition** STANDARD	33.25	166.25

Line Item Total	Freight	Handling	Restocking/ Cancellation Fee	Tax	Subtotal	Amount Received	Amount Due
407.75		1.00		25.55	434.30		434.30

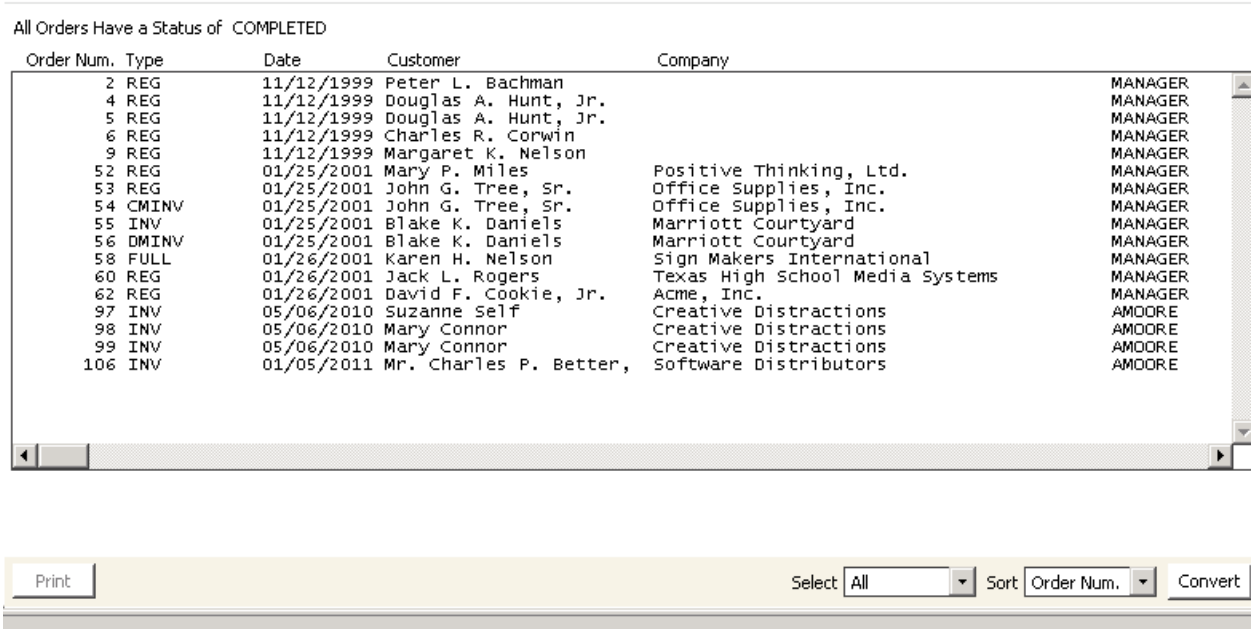
Example of an order Invoice; note the user defined fields

Closing orders

The Close orders option is used for closing orders that have a COMPLETED status. Only orders with a COMPLETED status can be closed.

The Close orders option is not a required step, and closing an order changes only the Orders.STAGE field from COMPLETED to CLOSED. It is available as an option for customers who may want to purge or archive order records; you can use the Closed status to indicate which orders are ready for purging or archiving.

Close orders window



Admin Console: Home > Commerce > Close orders
Desktop: Orders > Process orders > Close orders

To close an order

1. From Close orders window, select the order(s) you want to close.
2. Click Convert. A message displays prompting you to confirm closing the selected order (s).
3. Click Yes to the close the order(s).

Manually release backorders

The Manually release backorders option is used to reverse an order's BACKORDER status. A released backorder is removed from the holding stage for orders awaiting inventory and is returned to its appropriate order processing stage.

The Manually release backorders option is available even if the Automatic Backorder Processing option is enabled on the Backorder Processing window (from Orders, select Set up module, and click Backorders).

To release backorders manually

1. From Orders, select Process orders > Manually release backorders to open the Manually release backorders window.

   All of the orders with a BACKORDER status display on the window.

2. Select the order(s) you want to release from BACKORDER status.
3. Click Convert.

   A message displays prompting you to confirm returning the selected order(s) to the appropriate order processing stage.

4. Click Yes to release the backorder(s).

Package Installer Utility

Go to RiSE > Utilities > Package installer:

Use Package Installer Utility to select packages for installation, view currently installed packages, and view failed installations. Although making iParts deployable is the most common use for packages, they can also include:

- iMIS document system objects, such as queries, business objects, and content types
- SQL Scripts, which run against the iMIS database during installation
- Files, such as ASCX pages, images, and Word templates

To install a package

You can use the Package Installer to update the iParts on a system and to revert them. When you run the installer multiple times on the same package, it installs only one iPart. When you run the installer with multiple packages that install the same iPart, only one iPart is created, using the data in the last package you installed.

Note: Where you see local paths specified, be sure to use the path appropriate for your system, such as C:\Program Files (x86)\ for C:\Program Files\.

1. Stop the ASI Publishing Service.
2. Save the .ipackage file to the C:\Program Files\ASI\iMIS\Net\package\pending folder. Create the pending folder if it does not exist yet.

   Go to RiSE > Utilities > Package installer:
3. Select Packages to be Installed from the Show dropdown list.
4. Click Install.
5. Restart the Publishing Service.
6. If you installed any ActiveX controls, register the OCX files.

7. If your package includes a control (iPart or ActiveX), repeat this process on each additional application server that needs to host it. For example, if you host your staff site on your production iMIS application server and your Public view on an external webserver, add the Package Installer iPart to a content record that displays in both websites. Make sure you set up the correct security permissions to the iPart's page so that only authorized users are able to access it.

   Since iMIS runs with a single database, you do not have to install a package on multiple servers if it only includes database-related objects. But a control is an application component, so you need to deploy it on each server that hosts it. A package can install multiple times on the same database.

   To create a package

1. From the command line, change the directory to the following folder:

   cd C:\Program Files\ASI\iMIS\Net\bin

2. Execute the command to create the manifest: PackageBuilder.exe -create <packageFolder>

- Replace <packageFolder> with a path to the folder that contains the source files to be included in the package. For example:

  PackageBuilder.exe -create C:\MyNewiPart

- A package.manifest file is created for you in the <packageFolder> location.

  Note: If a package.manifest file already exists in that folder, it is overwritten when you run this command.

3. In a text editor, edit package.manifest to specify the package description and the install path for each of the package's files.

   Note: The install path is relative to the Net directory, which defaults to C:\Program Files\ASI\iMIS\Net

- ASCX files (iParts) usually install to: <InstallPath>iparts/Custom</InstallPath>
- DLL files usually install to: <InstallPath>bin</InstallPath>

- For <Type>Document</Type>, the <InstallPath> refers to a path in the document system. You can either enter a file system path or a document system path, such as $/Folder-/SubFolder.
- For <Type>Sql</Type>, the <InstallPath> is not required, because the SQL in the file specified by <Name> is executed. If the <InstallPath> is specified, then the corresponding SQL file is saved to that path. Additionally, the file extension for an SQL file must be .sql, or it will be treated as the File type during the PackageBuilder -create step.

4. Execute the command to build the package: PackageBuild.exe -build <packageFolder> <packageFileName>:

- packageFolder is the path to the folder that contains the source files to be included in the package, such as: C:\MyNewiPart
- packageFileName is the pathname of the package file to be generated (which must have the extension .ipackage), such as: C:\Program Files\ASI\iMIS\Net\package\pending\ASIEUGiftAidWebPart.ipackage

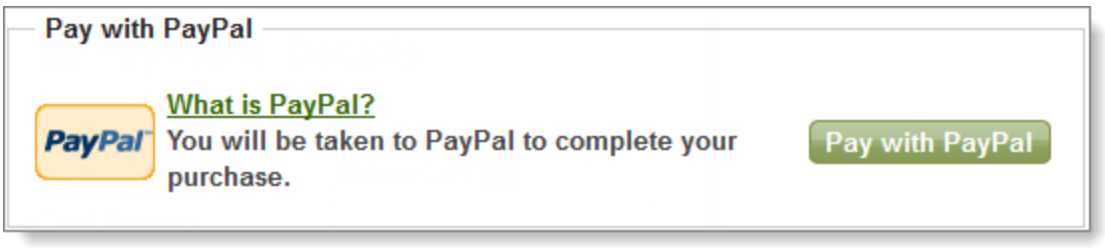
  The following is a sample package.manifest file:

```
<Package xmlns="http://schemas.imis.com/2008/01/DataContracts/iParts/PackageInstaller"
xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
<Name>Exampleipart</Name>
<Description>TODO: description of Exampleipart</Description>
<Files xmlns:a="http://schemas.imis.com/2008/01/DataContracts/iParts/PackageInstaller/">
<a:PackageFileData>
<Name>Example-iPart-InstallScripts.sql</Name>
<Type>Sql</Type>
<InstallPath>SqlScripts</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>Example-ContentType.xml</Name>
<Type>Document</Type>
<InstallPath>$/ContentManagement/DefaultSystem/ContentTypes</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>MetaBuilders.WebControls.dll</Name>
<Type>File</Type>
<InstallPath>bin</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>ExampleiPart.mycompany.dll</Name>
<Type>File</Type>
<InstallPath>bin</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>xDisplayExampleiPart.ascx</Name>
<Type>File</Type>
<InstallPath>iparts\mycompany\exampleipart</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>xEditExampleiPart.ascx</Name>
<Type>File</Type>
<InstallPath>iparts\mycompany\exampleipart</InstallPath>
</a:PackageFileData>
</Files>
</Package>
```

Payment Authorization

PayPal Express Checkout Integration

If you already accept credit cards online, you can set up Express Checkout with PayPal to integrate with your iPart-based sites. This additional payment option is a convenience for your members, customers, registrants, and donors, which means more revenue for your organization. This option also reduces your liability for holding cardholder data, because their credit card information is stored securely at PayPal.



The Pay with PayPal block appears in the Payment Creator iPart if you set up a cash account as a PayPal service.

PayPal payments can apply to a full range of items offered in iMIS sites:

- Products and product kits
- Event registrations
- Renewal invoices, for both accrual and cash dues
- Donations

iMIS handles PayPal Express Checkout differently for products that are not shipped:

- Shippable items (products and kits) require a deliverable address, which both iMIS and PayPal verify. iMIS sends the contact's name and address to PayPal, which displays the information on its site for the payer to verify.
- Non-shippable items (renewals, registrations, donations) require no delivery address, so none is sent to PayPal. Because of this, PayPal displays the name and address of the payer that it has on file, which may differ from the name and address stored in iMIS.

Your site visitors can complete transactions quickly and easily without entering credit card information:

1. After adding all items to their cart (or completing a standalone donation), users click Check out with PayPal.
2. They redirect to PayPal and sign in, where they complete their payment:

- see their payment item details
- review their shipping info
- select their method and complete payment

3. PayPal automatically returns the necessary information needed to confirm and fulfill the order. Your customer is returned to your website to view their confirmation.

   You can set up style elements in your PayPal account so that customers will feel comfortable that it is a continuation of their shopping experience from your site.

   Note: The Pay with PayPal option is hidden whenever the signed-in user works On Behalf Of another.

Setting up PayPal Express Checkout

Once your organization establishes a PayPal Business or Premiere account, you can integrate PayPal Express into iMIS to offer a preferred payment option to your site visitors. Setting this up involves creating your sandbox account with PayPal, creating the PayPal service in iMIS, and testing transactions between iMIS and PayPal.

These resources on the PayPal Developer site (www.X.com) will help your organization implement the service:

- Products > Express Checkout
- Getting Started Guides > Express Checkout API

To enable the service with PayPal

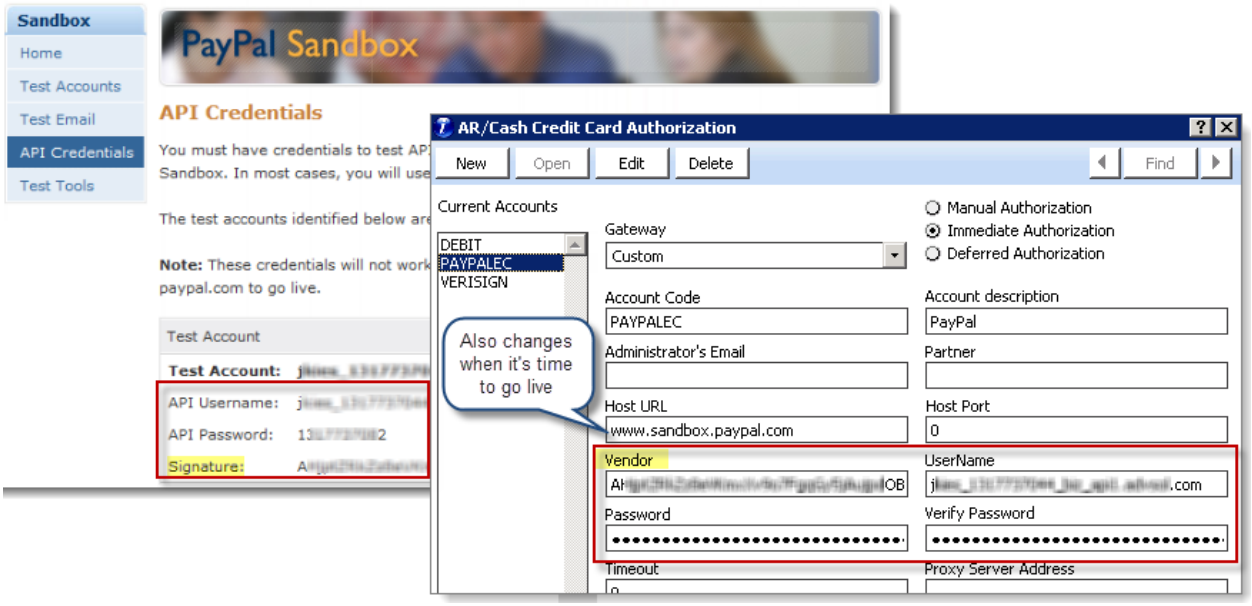
1. Sign up for Express Checkout. Log in, or select Create New Account.

Important: Express Checkout requires a Business or Premier account.

2. Set up a PayPal Sandbox account to use for testing, with at least two test accounts:

- A merchant account to represent your organization
- A personal account to represent your buyer

3. Sign into your sandbox account, click API Credentials to collect the information you need to enter into iMIS to begin your setup and testing:



To set up PayPal authorization in iMIS

Keep in mind that you will be moving between test (sandbox) mode and live mode, which requires a different Host URL and set of PayPal API Credentials. Before you begin your iMIS testing, remember that you must be signed in on the PayPal sandbox site.

Tip: Keep a separate instance of iMIS configured to use your sandbox settings, for ongoing testing.

1. In Desktop, select AR/Cash > Set up module, Credit Card Auth. Under Current Accounts, choose PAYPALEC.

If the PayPal account does not exist, create it: click New and add a Custom gateway with an Account Code of PAYPALEC, set for Immediate Authorization.

2. Set the PAYPALEC account values for your organization, and Save.

- In Host URL, enter the appropriate PayPal URL: www.sandbox.paypal.com (test) or www.paypal.com (live)
- Enter your organization's values for Vendor (the API Signature for your PayPal account), UserName, and Password.

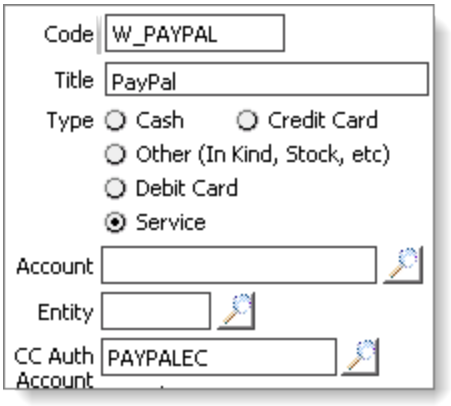
  Troubleshooting: If you get an error, verify that all of the cases match and remove any trailing spaces from these fields.

3. In AR/Cash > Set up tables > Cash accounts, add a cash account with these features:

- Code: W_PAYPAL

  Important: The code must begin with the prefix defined in System Setup > Set up web components > General configuration > Credit card prefix, which defaults to W_. This makes the account available to public users on the web.

- Title: PayPal (case-sensitive)
- Type: Service
- CC Auth Account: PAYPALEC



4. To enable PayPal as a payment option on the web for staff users, add an additional cash account in AR/Cash > Set up tables > Cash accounts with these features:

- Code: PAYPAL
- Title: PayPal (case-sensitive)
- Type: Service
- CC Auth Account: PAYPALEC

5. Verify that your web.config includes PayPal as a payment gateway provider, and that the authorization account code matches what you defined above:

   <add name="PayPalPaymentGatewayProvider" type-e="Asi.PaymentGateway.PayPalPaymentGatewayProvider, PayPalPaymentGatewayProvider" authorizationAccounts="PAYPALEC" />

6. If you are designing your own checkout pages, be sure that the Payment Creator and Submit Order Button iParts are on same page.

   To test the PayPal service

1. Important: Open your PayPal sandbox test site.

- Browse to developer.paypal.com and log in to your Business or Premier account.
- From the navigation at left, select Test Accounts.
- Choose a test account (such as the Business test acct) and click to Enter Sandbox Test Site.

2. On your iMIS site, complete a PayPal transaction.

- Put an item in your cart.

  When configured correctly, the Pay with PayPal panel appears directly above the payment methods drop-down in the Cart and on the Give & Go page.

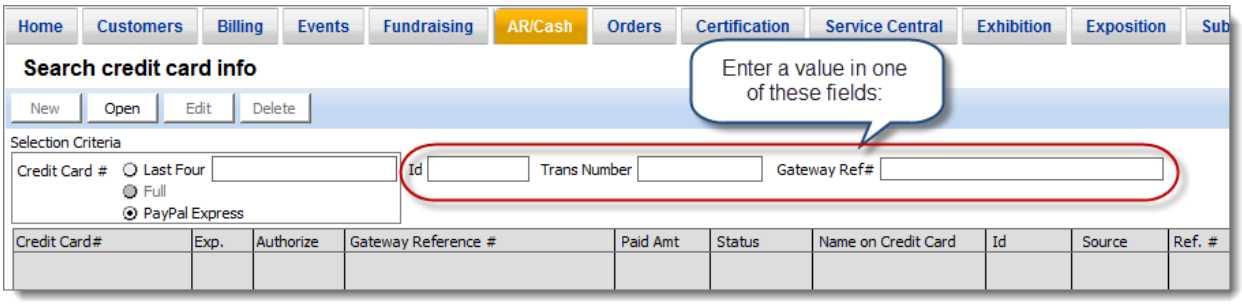
- Click Pay with PayPal, which redirects to the PayPal site.
- Log into PayPal with your personal test account, not your business account.

- Verify that your order details appear on the PayPal site, and click on Pay Now to complete the transaction.

  PayPal redirects you to the confirmation page in iMIS.

3. Verify that the transaction information was stored correctly in iMIS.

- In Desktop, go to AR/Cash > Credit Card Reporting > Search CC Info.
- To find the transaction, specify PayPal Express, enter the iMIS Id, Trans Number, or Gateway Ref#, which contains the Transaction ID that PayPal assigned.



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Restricting payment methods to PayPal only

If you want to switch to accepting payment through PayPal Checkout Express only for public users, you can easily reconfigure iMIS so that the Payment Creator allows payment through PayPal alone.

Note: These steps will restrict payment methods to PayPal alone only for public users. Staff users will still see other payment methods as defined in AR/Cash > Set up tables > Cash accounts.

To change cash accounts to support PayPal only

To achieve PayPal-only payments, you need to configure iMIS so that PayPal is the only web-enabled cash account. Here is a quick way to achieve this for public users without deleting any existing credit card accounts:

1. Go to System Setup > Set up web components > General configuration.
2. For Credit card prefix, change the default value W_ to another, such as Z_.

   This has the effect of hiding all of your existing W_ cash accounts from the Payment Creator.
3. In Desktop, go to AR/Cash > Set up tables > Cash accounts.
4. Add a cash account that is a copy of your W_PAYPAL account, named Z_PAYPAL.

   This new account must point to your existing PAYPALEC authorization account.
5. View your site and add an item to the cart to verify that Payment Creator is hiding the credit card options.

   Tip: To re-enable credit card processing, simply repeat the first two steps and restore the value W_.

Using PayPal for standalone donations

The Payment Creator iPart supports the PayPal Express Checkout panel when it appears outside of the context of the shopping cart, on a standalone donation page. The PayPal integration preserves any entries in the Display Name Editor (List As) and Tribute Gift Editor iParts. The PayPal option can enhance your campaign success by giving your site visitors the reassurance of a known and secure payment method.

Note: On contact account pages, the Giving History iPart lists donations paid using PayPal as having a Type of Cash.

See iParts for donation features in iPart Essentials for details on setting up standalone donations.

Auditing PayPal payments

To reconcile transactions in your iMIS database with the PayPal Express entries, use the transactions report to obtain the Transaction IDs, Gross and Net amounts, dates, and PayerIDs. On the PayPal site, you can look up a PayerID to identify the purchaser.

To reconcile transactions in your iMIS database with the reports in PayPal, look at the Transaction ID that appears in the Details for an entry on the Overview page.

Tip: Keep in mind that it is possible for addresses and even names to differ between iMIS and PayPal for a single Transaction ID. The Transaction ID in the merchant account listing is what pairs the two.

To retrieve audit details from PayPal

1. Log on to paypal.com using your seller account.
2. Select your account and enter the site.
3. Locate the most recent transaction, verifying that the amount matches the order.
4. Click the Details link for that line.
5. View Unique Transaction ID # that appears next to the text Express Checkout Payment Received.
6. In iMIS Desktop, look up the values as appropriate:

- Orders > Open an order > Payments tab, Gateway Ref#
- Events > Register a customer > Open a registration > Payments tab, Gateway Ref#
- AR/Cash > Credit card reporting > Search CC Info, any combination of iMIS ID, iMIS Trans ID, and Gateway Ref#
- (for future release) AR/Cash > Generate Reports > Credit Card > Credit Card Post Authorization Report (Crystal) returns the results for CC Auth Acct of PayPal (which is tied to cash accounts with a type of Service).

Refunding PayPal payments

Refunding customer payments always involves iMIS Desktop, where you cancel out the payments and issue refunds. When PayPal is the payment method, refunds must be made via PayPal as well.

Important: The only time that both iMIS and PayPal process payments automatically is when they are first entered by customers on your site. Any subsequent transactions affecting that payment must be entered manually into both PayPal and iMIS Desktop.

Reversing a PayPal payment (such as to remove payment for a registration) takes two steps:

1. PayPal: Log into PayPal and process the refund using PayPal's standard procedures.
2. Desktop: Open AR/Cash and create a new payment to cancel the prior one:

- Enter the appropriate ID, the PayPal cash account (typically W_PayPal) in the Check/CC field, and a negative payment amount.
- Apply the (negative) payment to the original transaction: Edit the transaction, and enter a negative amount in the Amt Paid box, so that it has a balance due.

If the transaction will not be paid by another method and you need to reverse the original purchase, use the normal procedures to cancel a registration/order/donation.

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Authorizing Credit Cards in iMIS

Card authorization is the process of obtaining payment authorization when a credit/debit card transaction is entered. Credit/debit card transactions can be authorized across these areas of iMIS:

- AR/Cash: Sales transactions and cash receipts windows
- Billing: Dues and subscriptions payments
- Fundraising: Gifts, pledges, and fundraising payments
- Service Central: Payment entries
- Public view: Events registration and order entry

Card Authorization allows you to search by card number or customer ID to find credit/debit card transactions throughout iMIS.

Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Card authorization requirements

iMIS ships with the card authorization and Service Central modules. To use card authorization in iMIS, you need the CCAUTH license key. You also need a high-speed Internet connection to handle a high volume of transactions.

To use card authorization, you must:

1. Set up a merchant account at your bank or another financial institution.
2. Set up a payment processing account. Your payment processor must be supported by your payment gateway service. If you are doing business outside of the United States, use a payment processor that handles international currencies.
3. Register with a payment gateway service and install additional gateway software as required. iMIS natively supports Payflow Pro (see "Implementing Payflow Pro as an

authorization gateway"), offered by PayPal, (previously Verisign), and SafePay (see "Implementing SafePay as an authorization gateway"), offered by TNS (previously Dialect and QSI), which handles international sales.

Note: European debit card transactions in iMIS cannot be processed with either gateway. Instead, your AiSP must implement a custom gateway interface.

Before you take any of these steps, you should understand what card authorization is and how it works.

The card authorization process

Card authorization allows you to accept a credit/debit card payment from a customer and, within a matter of seconds, have the card transaction approved over the Internet by your bank. You also have the option of having transactions deferred for authorization at a later time.

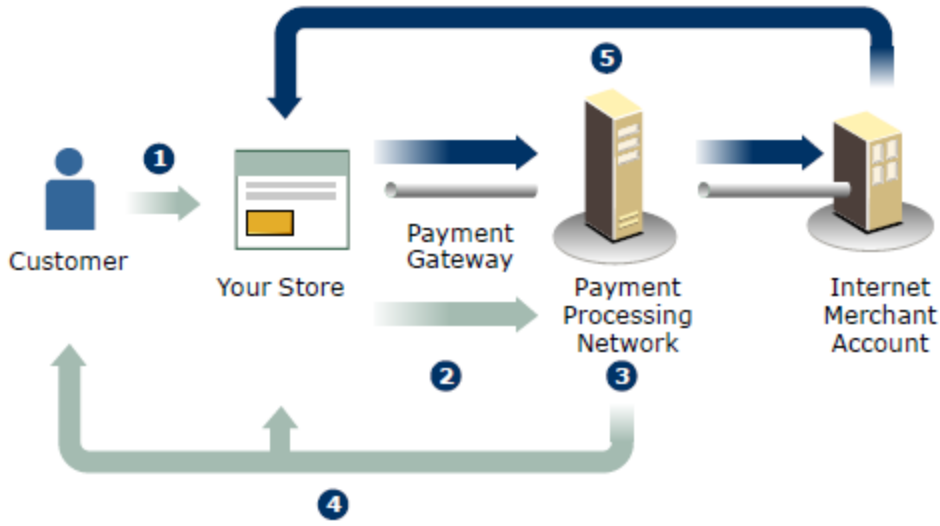


Diagram and steps from PayPal

Credit card authorization includes these steps:

1. A customer purchases a product or service from your store.
2. The payment gateway encrypts data and securely sends it through the payment processing network.

3. The transaction is reviewed for authorization or decline, and the results are sent back through the Payflow payment gateway.
4. Your customer receives a confirmation receipt and you fulfill the order.
5. Once the transaction is processed, funds are transferred from the customer's bank account to your merchant bank account.

Card authorization terms

Before you get started, it is a good idea to become familiar with some of the terms that are used throughout this section. The following is a list of some of the most commonly used terms.

Acquiring financial institution

An acquiring financial institution is a bank or other financial organization that contracts with banks and merchants to allow merchants to accept card transactions. Some financial institutions perform merchant services; others outsource these services to a third-party processor.

Authorization

An authorization is an electronic request for approval of the sale that is sent to the financial institution that issued the customer's credit/debit card. Authorization options in iMIS include Manual, Immediate, and Deferred. Manual is the default authorization setting.

Batch (CC Auth)

A batch is an accumulation of card transaction authorizations that are awaiting settlement.

Capture

A capture is the process of submitting a credit/debit card sale for financial settlement. When a transaction is captured, the sale amount is credited to your deposit account through your acquiring financial institution and posted to the cardholder's credit/debit

card account. This transaction usually occurs after midnight when authorizations for the previous day are batched.

Card authorization gateway

A card authorization gateway is a third-party credit/debit card interface, similar to an automated point-of-sale system that provides a front end to financial networks, financial institutions, and payment processors, which allows merchants to provide credit/debit card authorization to their clients.

Card Security Code (CSC)

The 3- or 4-digit, unembossed number that displays on the front or back of a credit/debit card; often used as an added measure of verification for card transactions. The Card Security Code (CSC) is not part of the actual card number.

DBA name

(Doing Business As) A DBA name is the name used to identify the business, as opposed to the business' legal name.

Deferred authorization

Deferred authorization is transaction information that is saved for later processing.

Manual authorization

Manual authorization option enables a system licensed for card authorization to turn off automatic authorization.

Editing

Editing is the process of changing the payment information for a transaction in the Trans database table in iMIS.

Flag

To flag is to mark a transaction to be processed later.

Immediate authorization

With immediate authorization, the payment information is sent immediately to the gateway for authorization (and for later capture) when a credit/debit card transaction is entered.

Issue date

The 5-character date (mm/yy format) date of issue that is printed on certain European debit cards, used for authentication.

Issue number

The 1- or 2-digit number that is printed on certain European debit cards, which indicate how many versions of the card have been issued to the cardholder. This value is used for authentication.

Issuing financial institution

An issuing financial institution extends credit to a customer through credit card accounts or provides electronic account debits through debit cards. The issuing financial institution issues a credit card and bills the consumer against the credit card account. An issuing financial institution is also referred to as the cardholder's financial institution or issuer.

Merchant account

The account that collects the funds from a credit/debit card transaction. The merchant account receives the funds after the capture is complete.

Submit

Submit is the process of sending deferred credit/debit card transactions to a gateway for authorization.

Settlement

Settlement is the process in which an electronic credit card transaction is settled between your acquiring financial institution and the customer's credit card issuing financial institution. Your acquiring financial institution credits your account for the credit card sale and the sale is posted to the customer's credit card account.

User account

The account that is debited after an authorized credit/debit card transaction is captured.

Void

A void is a deleted payment transaction. The transaction can then be replaced with a new transaction.

Setting up card authorization

Note: If you are creating a custom gateway, see Creating a custom credit card gateway.

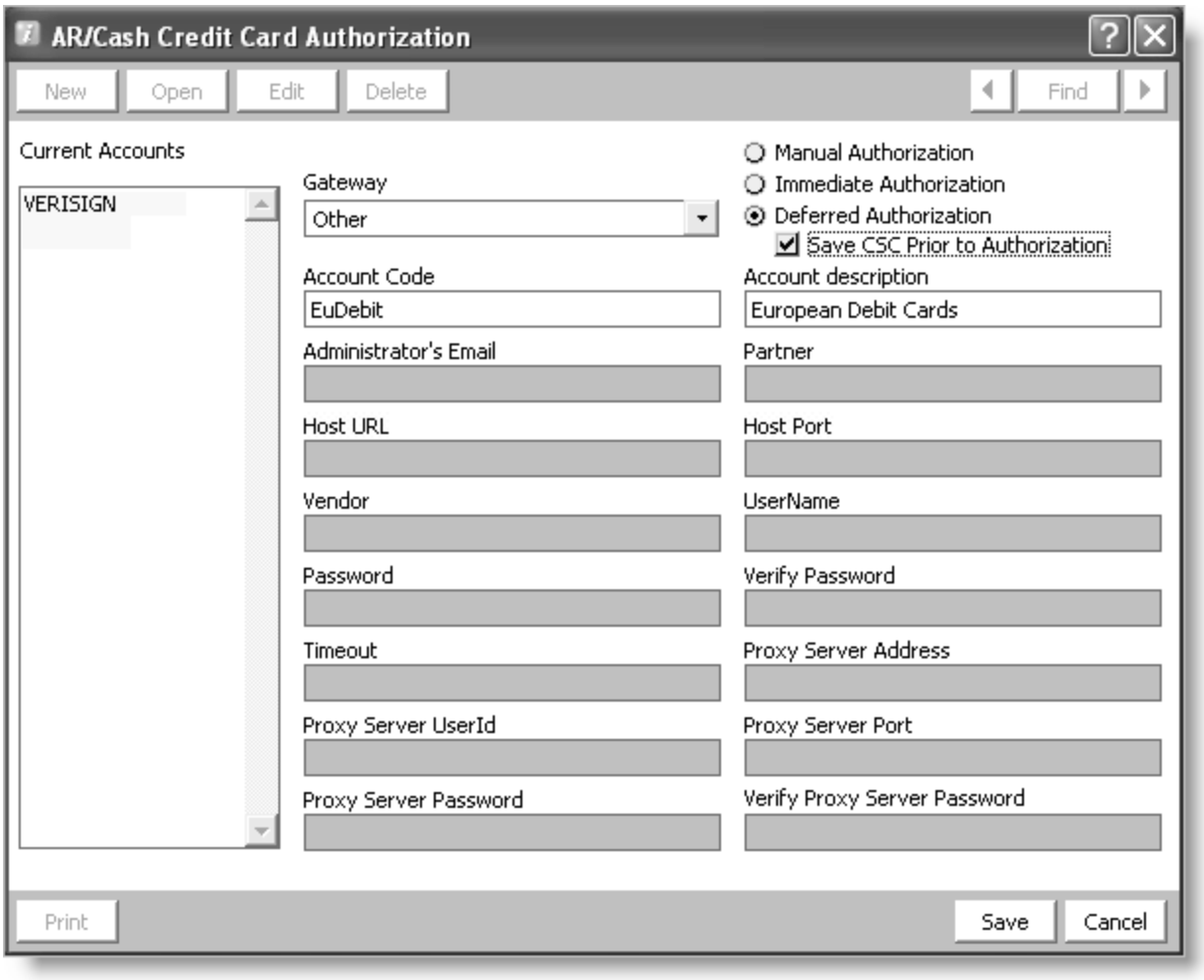
Installing iMIS and adding license keys

The first step in getting started is to install iMIS, which includes the components needed to run card authorization. However, you must have the CCAUTH license key in your system before you can use this function.

Note: To set up card authorization, you need a relevant license, such as CCAuth or Service Central.

AR/Cash Credit Card Authorization window

This window specifies authorization options for credit cards and European debit cards.



From AR/Cash, select Set up module and click Credit Card Auth

Current Accounts

Lists the currently defined card authorization accounts.

Gateway

Lists the authorization gateways supported by iMIS.

- Payflow Pro authorizes domestic credit cards.
- SafePay authorizes international credit cards.
- Other, for European debit cards, enables storage of encrypted CSC values and unencrypted issue number and issue date values so that a custom gateway for deferred

authorization of European debit card transactions can be implemented.

- Custom gateways, which you can write and install on your system.

  Authorization options

  Specifies the type of authorization that will be performed for all credit/debit card cash accounts that use this card authorization account.

- Manual Authorization – Disables automated authorization through a gateway. The payment information can be edited or deleted at any time until invoiced.
- Immediate Authorization (Payflow Pro and SafePay gateways only) – Performs automated authorization through a gateway. Payment information can be edited or deleted the same day only. Because the Other gateway is not supported, immediate authorization cannot be used for European debit card transactions. The following authorization process is used:

1. Credit card payment is entered.
2. Credit card information is immediately sent for authorization.
3. Authorization is returned and transaction is saved for later capture.
4. Transaction is saved and completed.

- Deferred Authorization – Performs automated authorization through a gateway. Payment information can be edited or deleted until the transaction is captured. The following authorization process is used:

1. Credit/debit card payment is entered.
2. Transaction information is saved for later batch processing.
3. Transactions are periodically sent in a batch for authorization and capture.
4. Transactions in the batch are saved and completed.

   Save CSC Prior to Authorization

(only for Deferred Authorization) Saves the card security code (CSC) value in an encrypted format in the iMIS database, so that the CSC information can be sent with all other transaction information in the batch for deferred authorization.

If the associated Gateway is Payflow Pro or SafePay, iMIS automatically deletes the saved CSC information after successful deferred authorization. If the associated gateway is Other, however, the custom gateway implemented by your AiSP for European debit card authorization is responsible for ensuring that the saved CSC information is deleted from your iMIS database.

Account Code

Specifies a short name for the account.

Account description

(optional) Specifies a description for the account.

Administrator's Email

(Payflow Pro and SafePay gateways only) Specifies the email address of your iMIS administrator so that the gateway service can contact the administrator if necessary.

Partner

(Payflow Pro gateway only) Specifies the Payflow Pro partner name that was obtained when you created your account.

Host URL

(Payflow Pro gateway only) Specifies the web address of the Payflow Pro gateway.

Host Port

(Payflow Pro gateway only) Specifies the port number of the Payflow Pro gateway.

Vendor

(Payflow Pro and SafePay gateways only) Specifies your Payflow Pro user name or your SafePay merchant administration login (username) that was obtained when you created your account.

UserName

(Payflow Pro and SafePay gateways only) Specifies your Payflow Pro user name or your SafePay merchant ID that was obtained when you created your account.

Password, Verify Password

(Payflow Pro and SafePay gateways only) Specifies your Payflow Pro password or your SafePay merchant administration login password.

Timeout

(Payflow Pro gateway only) Specifies the gateway connection timeout value, in seconds. ASI recommends a timeout value of 30 seconds.

Proxy Server Address

(optional, Payflow Pro gateway only) Specifies the IP address of your organization's proxy server.

Proxy Server UserId

(optional, Payflow Pro gateway only) Specifies the user ID of your organization's proxy server.

Proxy Server Port

(optional, Payflow Pro gateway only) Specifies the port number of your organization's proxy server.

Proxy Server Password

(optional, Payflow Pro gateway only) Specifies the password required by your organization's proxy server.

Verify Proxy Server Password

(optional, Payflow Pro gateway only) Specifies the password required by your organization's proxy server.

Setting up credit/debit card cash accounts in AR/Cash

You must set up credit/debit card cash accounts on the Set up cash accounts window in AR/Cash before you can use card authorization. When you select a cash account of type Credit Card or Debit Card, the CC Auth Account field displays, enabling you to associate a card authorization account with a credit/debit card cash account. The system automatically generates a read-only description under the CC Auth Account field. The CC Auth Account field requires a value when you select a cash account of type Credit Card or Debit Card.

To define a new credit/debit card cash account code

Note: Before defining new credit/debit card cash accounts, set up your card authorization accounts on the AR/Cash Credit Card Authorization window (AR/Cash > Set up module, Credit Card Auth).

1. Select AR/Cash > Set up tables > Cash accounts.
2. Click New.
3. In the Code field, enter the abbreviation you want to assign to the cash account you are creating.

   Note: You can use any code you prefer for a credit/debit card. However, for a credit card number to be validated by iMIS, the value, in addition to being a cash account of type Credit Card, must contain one of the credit card types iMIS supports: AMEX, VISA, MC, DISC, DINERS, CB.
4. In the Title field, enter the full name you want to assign to the account.
5. Under Type, enable either the Credit Card or Debit Card option.
6. (optional) In the Account field, enter the GL chart of accounts number for the cash account assigned to this table entry, or click the Find icon to select a value.
7. (optional) For multiple entities, enter the Entity code, or click the Find icon to select a value.

8. Enter the CC Auth Account, or click the Find icon to select a value.
9. (optional) Select the appropriate CSC Required option:

- Web Entry – in all web-based views of iMIS, makes the Card Security Code field required for the specified credit card.
- Workstation Entry – in iMIS Desktop, makes the CSC field required for the specified credit card.

  Note: When making the CSC value required, ensure the card authorization account to which the credit/debit card cash account is associated is set to Immediate Authorization or Deferred Authorization.

10. (optional) Select the appropriate Display Issue option(s):

- Number - Select this option to display a field for the entry of a European debit card's issue number.
- Date - Select this option to display a field for the entry of a European debit card's issue date.

11. Click Save.

To modify a credit/debit card cash account

Card authorization accounts are limited in how they can be modified; you may need to create new ones.

1. Select AR/Cash > Set up tables > Cash accounts.
2. Select a code to edit from the Current Cash Accounts list.
3. Modify the credit/debit card cash account:

- Click Edit to make any necessary changes to the cash account.
- Click Delete to delete the cash account.

  Note: When editing card authorization accounts, you cannot modify the values for the Gateway or Account Code field.

Note: You cannot delete a card authorization account that has been assigned a cash account.

4. Click Save.

Requiring a Card Security Code (CSC) for credit/debit card transactions

As an additional verification for iMIS Desktop credit card transactions, you can make the Card Security Code (CSC) a required value for specific credit/debit card cash accounts. A CSC is the 3- or 4-digit unembossed number that displays on the front or back of a credit/debit card. The CSC is not part of the actual card number and is useful in situations where the card holder is not present when the payment is being made.

To make the CSC required, select the CSC Required option for Web Entry, Workstation Entry, or both for the specified credit/debit card cash account(s) on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts). Selecting the CSC Required option for Web Entry makes the CSC required for the specified cash account in the web views. Selecting the CSC Required option for Workstation Entry makes the CSC required for the specified cash account in iMIS Desktop. When the CSC Required option is selected (for either Web Entry or Workstation Entry), a CSC value is required before you can complete the credit/debit card transaction using the specified cash account(s).

A CSC is not required when processing a reversal payment transaction (for example, entering a credit transaction) or when editing a payment transaction.

Note

- For transactions associated with card authorization accounts that use Immediate Authorization, the CSC value is not stored in the database. The value that displays in the Card Security Code or CSC field is deleted once the transaction is submitted for processing.
- For transactions associated with card authorization accounts that use Deferred Authorization and for which the Save CSC Prior to Authorization option has been selected, the CSC value is temporarily stored in an encrypted format in the iMIS database. For Payflow Pro and SafePay gateways, iMIS then deletes the stored CSC information after successful authorization. If a saved payment is viewed prior to successful authorization, the

CSC number appears as three asterisks regardless of the security level of the iMIS user.

- For Other gateways, which are used only for European debit cards, the CSC information stored in the iMIS database is not automatically deleted by iMIS after successful deferred authorization. You should ensure that the custom gateway interface implemented by your Solution Provider deletes the stored CSC information after being successfully authorized.

  iMIS Desktop only validates that a CSC value is present (if required) and that the value is a 3- or 4-digit alphanumeric character. CSC validation depends on various factors that go beyond the scope of iMIS (for example, whether the credit card processor supports CSC). For specific information regarding CSC validation, contact your authorization gateway, merchant bank, credit/debit card processor, or any other third-party involved in validating your credit card transactions.

  Location of CSC fields

  CSC values can be entered in many locations throughout iMIS. For iMIS payment windows, the CSC field appears only when you enter a credit/debit card cash account that is associated with a card authorization account that uses Immediate Authorization, or that uses Deferred Authorization with the Save CSC Prior to Authorization option selected.

- AR/Cash
- Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions> Cash receipts)
- Enter and edit sales transactions window (from AR/Cash, select Enter and edit transactions> Sales transactions)
- Billings
- Enter and edit payments window (from Billing, select Enter and edit payments)
- Certification (European debit cards only)
- Order Payment window (from Certification, register a student and create an order)
- Events (European debit cards only)

- Payments tab on the Register a customer window (from Events, select Register a customer, and select the Payments tab)
- Payments window (from Events, select Register a customer, select the Payments tab, and click More Payments)
- Exhibition (European debit cards only)
- Payments tab on the Process orders window (from Exhibition, select Process orders, and select the Payments tab)
- Payments window (from Exhibition, select Process orders, select the Payments tab, and click More Payments)
- Exposition (European debit cards only)
- Payments window from Process booth orders (from Exposition, select Process booth orders and click Payment)
- More Payments window from the Payments window (from Exposition, select Process booth orders, click Payment, and click More Payments)
- Fundraising
- Overview tab on the Enter and edit gifts window (from Fundraising, select Enter and edit gifts)
- Process payments window (from Fundraising, select Process payments)
- Orders (European debit cards only)
- Payments tab of the Enter and edit orders window (select Orders, select Enter and edit orders, enter or open an order, and select the Payments tab)
- Service Central
- Enter and edit payments window (from Service Central, select Enter and edit payments)
- Payment Entry window (from Service Central, select Process customer requests, and select Payment)

Accepting and validating Diners Club and Carte Blanche credit cards

iMIS accepts and validates Diners Club and Carte Blanche credit cards. To use Diners Club and Carte Blanche credit cards to process payment transactions, you must set up the following two new credit card type values on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts):

- DINERS (Diners Club)
- CB (Carte Blanche)

The following credit card number is available for testing Diners Club and Carte Blanche credit card transactions:

3056 9309 0259 04

Note: For testing purposes, transactions must be under $100.00.

You can process transactions using credit card types with variations of the supported credit card types (for example, DINERS1, DINERS2).

You can enter any credit card value in the Check/CC field on the Enter and edit sales transactions window (from AR/Cash, select Enter and edit transactions > Sales transactions) and the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions > Cash receipts). However, for a credit card number to be validated by iMIS, the value entered in the Check/CC field, in addition to being a cash account of type Credit Card, must contain one of the supported credit card types: AMEX, VISA, MC, DISC, DINERS, CB (for example, MY-AMEX).

Setting up multiple card authorization accounts

Organizations that use iMIS to process accounting transactions may have multiple credit/debit card cash accounts and may want to control how funds are allocated to financial institutions.

For example, an organization that has domestic and international accounts may not want the international accounts processed, but may want to store the information in iMIS. The organization could create a new card authorization account for the international accounts,

set the account to Manual Authorization, and create a corresponding cash account and set its CC Auth Account value to the new card authorization account.

Setting up authorization options in Fundraising

When setting up the Fundraising module for card authorization, we recommend disabling the Do Not Validate Credit Card field on the Fundraising Set up module window (from Fundraising, select Set up module).

If you enable this option, the credit/debit card number will not automatically format when it is entered on the Fundraising Enter and edit gifts window. If Deferred Authorization is enabled on the AR/Cash Credit Card Authorization window, transactions made on the Overview tab on the Enter and edit gifts window with unformatted credit/debit card numbers will not display in credit/debit card searches and will not print on the Deferred Credit Card Pre-Authorization report.

Setting up European debit card authorization

You can set up a card authorization account that can be used either for manual authorization or deferred authorization of European debit cards through a custom gateway interface.

To set up European debit card authorization

1. From AR/Cash, select Set up module.

   The Set up module window appears.

2. Click Credit Card Auth.

   The AR/Cash Credit Card Authorization window appears.

3. Click New.

4. From the Gateway drop-down list, select Other.

5. In the Account Code field, specify a short label for this card authorization account.

6. (optional) In the Account description field, specify a description for this card authorization account.

7. Select either Manual Authorization or Deferred Authorization for this card authorization account.
8. If you have selected Deferred Authorization and your authorization service requires CSC information for European debit card transactions, select the Save CSC Prior to Authorization checkbox.

   Note: You should ensure that the custom gateway interface implemented by your AiSP deletes the stored CSC information after being successfully authorized.
9. Click Save.

Setting up an authorization account for non-iMIS supported gateway

You must assign a card authorization account to each credit/debit card cash account you create in iMIS.

To set up an account for non-iMIS supported gateways

1. Select AR/Cash > Set up module, Credit Card Auth.

   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.
2. Click New and select Other from the Gateway from the drop-down list.
3. Select Manual Authorization.
4. Enter NOPROCESS as the Account Code.

   Caution! NOPROCESS has been associated in the web.config file as a no processing payment gateway. If you enter a different code, you will have to modify your web.config files for that code to be recognized.

   This value displays in the Select a Value window that opens when you use the lookup icon on the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.
5. Enter a meaningful description for the authorization account in the Account description field.

This information displays as read-only data under the CC Auth Account field on the Set up cash accounts window.

6. Click Save.

Database schema for authorization and cash accounts

Card authorization account information and cash account information is kept in the following iMIS tables.

Payflow Pro credit card authorization accounts

The following columns in the CCAuthAcct table are used for each Payflow Pro (PayPay, previously Verisign) card authorization account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CCAuthAcctDescription	varchar (255)	Description associated with an account code
CCAuthMode	tinyint	Authorization mode: 0 (manual), 1 (immediate), or 3 (deferred)
CCAuthAdminEmail	varchar (255)	E-mail address of the system administrator responsible for setting up the accounts
CCAuthUrl	varchar (255)	URL of the test or live site
CCAuthGateway	varchar (255)	Gateway interface through which card authorization occurs
CCAuthPort	int	Port address used for transaction processing
CCAuthUser	varchar (255)	Username created during setup process
CCAuthPassword	varchar (255)	Password created during sign-up process
CCAuthVerisignPartner	varchar	Partner name supplied

	(255)	
CCAuthVerisignVendor	varchar (255)	Vendor name supplied
CCAuthTimeout	int	Timeout period supplied
CCAuthVerisignProxyServer	varchar (255)	Proxy server supplied by network administrator
CCAuthVerisignProxyPort	varchar (255)	Proxy port supplied by network administrator
CCAuthVerisignProxyUser	varchar (255)	Proxy user ID supplied by network administrator
CCAuthVerisignProxyPassword	varchar (255)	Proxy password supplied by network administrator
CCAuthSaveCscBeforeAuth	tinyint	Handling of CSC value for deferred authorization: 0 (do not save CSC in iMIS) or 1 (save encrypted CSC in iMIS then delete after successful authorization)

SafePay credit card authorization accounts

The following columns in the CCAuthAcct table are used for each SafePay (TNS, previously Dialect and QSI) card authorization account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CCAuthAcctDescription	varchar (255)	Description associated with an account code
CCAuthMode	tinyint	Authorization mode: 0 (manual), 1 (immediate), or 3 (deferred)

CCAuthAdminEmail	varchar (255)	E-mail address of the system administrator responsible for setting up the accounts
CCAuthGateway	varchar (255)	Gateway interface through which card authorization occurs
CCAuthUser	varchar (255)	Merchant ID created during setup process
CCAuthVerisignPartner	varchar (255)	Merchant Administration login (username) obtained from QSI/Dialect during setup process
CCAuthPassword	varchar (255)	Merchant Administration login (username) password obtained from TNS during setup process
CCAuthSaveCscBeforeAuth	tinyint	Handling of CSC value for deferred authorization: 0 (do not save CSC in iMIS) or 1 (save encrypted CSC in iMIS then delete after successful authorization)

Other gateway credit card authorization accounts

The following columns in the CCAuthAcct table are used for each Other card authorization account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CCAuthAcctDescription	varchar (255)	Description associated with an account code
CCAuthMode	tinyint	Authorization mode: 0 (manual), 1 (immediate), or 3 (deferred)
CCAuthGateway	varchar (255)	Gateway interface through which card authorization occurs

CCAuthSaveCscBeforeAuth	tinyint	Handling of CSC value for deferred authorization: 0 (do not save CSC in iMIS) or 1 (save encrypted CSC in iMIS)

Credit/debit cards cash accounts

The following columns in the Cash_Accounts table are used for each credit/debit card cash account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CSC_ REQUIRED_ WEB	bit	Indicates whether the CSC value is required on the web: 0 (not required) or 1 (required)
CSC_ REQUIRED_CS	bit	Indicates whether the CSC value is required in iMIS: 0 (not required) or 1 (required)
ISSUE_NO_ FLAG	tinyint	Indicates whether the Issue Number field should be displayed in iMIS payment entry windows: 0 (not displayed) or 1 (displayed)
ISSUE_DATE_ FLAG	tinyint	Indicates whether the Issue Date field should be displayed in iMIS payment entry windows: 0 (not displayed) or 1 (displayed)

Setting up credit card authorization for the Public view

Use the following steps to accept credit card payments in iMIS Public view:

1. Set up credit card authentication (AR/Cash > Set up module > Credit Card Auth). See AR/Cash Credit Card Authorization window.

2. Set up cash accounts for online registration credit cards (AR/Cash > Set up tables > Cash accounts). See Setting up credit/debit card cash accounts in AR/Cash.

   Note: The cash account codes must be prefixed with "W_" (such as "W_VISA") to accept credit card payments via the Public view.

3. Modify the web.config file to include the Gateway Account Code. See Modifying the web.-config file with the credit card gateway.

   Modifying the web.config file with the credit card gateway

   In order to accept credit card payments in the Public view or any iParts website, you must add the Gateway Account Code to your web.config file. This must be updated in the iMIS_Public folder if you are using the iMIS Public view or the NET folder if you are using any website containing iParts. If you do not make this change, you will receive the error message, “An error occurred while processing a payment. Payment gateway was not found to match the associated authorized account” Here are the steps you need to follow:

1. Select AR/Cash > Set up module > Credit Card Auth.
2. Take note of your Account Code for the gateway you are using.
3. On your application server, open the web.config file located in your iMIS_Public folder if you are using the iMIS Public view or the NET folder if you are using any website containing iParts.
4. Search for AuthorizationAccounts. The code should look similar to the following:

   <add name="PayFlowProPaymentGatewayProvider" type-
   e="Asi.PaymentGateway.PayflowProPaymentGatewayProvider, Pay-
   flowProPaymentGatewayProvider"
   authorizationAccounts="VERISIGN,PaymentTech,PAYFLOWPRO" />

5. Place a comma after PAYFLOWPRO and add the Account Code for your credit card gateway and save. For example, if your credit card gateway Account Code was labeled CREDITCARDS, then your code should read similar to the following:

   <add name="PayFlowProPaymentGatewayProvider" type-
   e="Asi.PaymentGateway.PayflowProPaymentGatewayProvider,

PayflowProPaymentGatewayProvider" author-izationAccounts="VERISIGN,PaymentTech,PAYFLOWPRO,CREDITCARDS" />

6. Restart IIS and your credit cards should work in iMIS Public view or any iParts website.

Customizing credit card fields for the Public view

When configuring the Public view for card authorization, go to these locations to adjust your settings:

1. System Setup > Set up commerce web components > Credit card label configuration
2. System Setup > Set up commerce web components > Checkout configuration
3. AR/Cash > Set up tables > Cash accounts - Enable the CSC Required Web Entry option if the CSC code is required for Public view transactions. See Setting up credit/debit card cash accounts in AR/Cash.

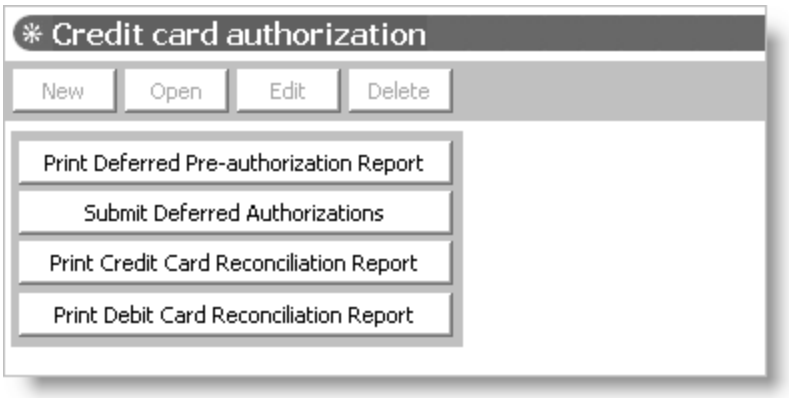
Using card authorization

Once you have set up the AR/Cash options and tested your credit/debit card gateway, you are ready to use card authorization.

- Credit card transactions can be processed in iMIS with either deferred or immediate authorization, as defined by the associated card authorization account.
- European debit cards, however, can be processed only with deferred authorization, and only if your Solution Provider has implemented a custom gateway interface for European debit card authorization.

Credit card authorization window

Note: If you have not set up credit card cash accounts in the AR/Cash module, the Credit card reporting menu item is disabled.



From AR/Cash, select Credit card reporting > Credit card reports

To generate credit/debit card reports, from AR/Cash, select Credit card reporting > Credit card reports. The following report options display on the Credit card authorization window:

- Print Deferred Pre-authorization Report – Prints a report of deferred credit/debit card transactions. The report parameters include Date Range and Org Code.
- Submit Deferred Authorizations – Sends transactions flagged for deferred authorization. All flagged transactions are submitted immediately. This applies only to deferred credit/debit card authorizations.
- Print Credit Card Reconciliation Report – Prints a credit card reconciliation report.
- Print Debit Card Reconciliation Report – Prints a European debit card reconciliation report.

  Note: If you have not set up European debit card cash accounts in the AR/Cash module, the Print Debit Card Reconciliation Report button is not available.

Immediate card authorization

If you have enabled the Immediate Authorization option, and then entered a credit card payment, the transaction information is sent immediately through the gateway to the financial institution for authorization. After the payment is authorized, the funds are captured at midnight of the transaction date.

Note: European debit card authorization accounts cannot be configured to use the Immediate Authorization option.

To enter a credit card payment using immediate authorization

1. From AR/Cash, select Enter and edit transactions > Sales transactions to open the Enter and edit sales transactions window.

   Note: For this example, we are using the Enter and edit sales transactions window. You can enter the credit card payments in any of the windows available for credit card authorization.

2. Click New.
3. Enter the customer ID in the Id field.
4. Enter a product in the Product field, or click the Find icon to select a value.
5. Enter the product quantity in the Quantity field.
6. Enter the credit card code in the Check/CC field. Several additional credit card fields display when you press Tab.
7. Enter the credit card number in the CC # field.
8. If required, enter the Card Security Code in the CSC field.
9. Enter the expiration date in the Exp field.
10. Enter the name on the credit card in the Name on CC field. This does not have to be the same as the customer name.
11. Enter an amount in the Payment Amount field.
12. Click Save.

- If the transaction was authorized, the Authorize field on the payment transaction window populates with the authorization code and the transaction is saved. In addition, if you entered a value in the CSC field, the field is now blank because the system automatically deleted the value once the transaction has been submitted.

- If the authorization was declined, an error message displays indicating that the transaction was declined.Select OK to exit the Results window and return to the transaction window. If the transaction was declined, DECLINED displays in the Authorize field in the payment window.

  Note:

- There could be several reasons for a declined authorization, such as bad card, invalid data, or invalid credit card number.
- At this point, you are not able to save the transaction. You can edit the payment date, amount, name, credit card number, and expiration date, and then resubmit the transaction for authorization.

  #### Deferred authorization of payments

  Deferred credit/debit card payments are entered in the same manner as if you were using immediate authorization. When a deferred transaction is saved (by clicking OK), the word DEFER displays in the Authorize field. If you select the Deferred Authorization option, credit/debit card transactions are deferred until you submit them.

  Caution! Do not accidentally enter any data in the Authorize field. When entering payment information, the Authorize field is empty. It remains empty until you save the transaction, then it populates with the word DEFER to indicate that it is batched for authorization. However, you might need to authorize a payment through a credit card machine or by calling the merchant bank, so iMIS allows you to manually enter authorization codes for these circumstances. However, keep in mind that if you do enter information in this field, iMIS assumes that it is a manually entered authorization code.

  #### Running a Deferred Pre-Authorization report

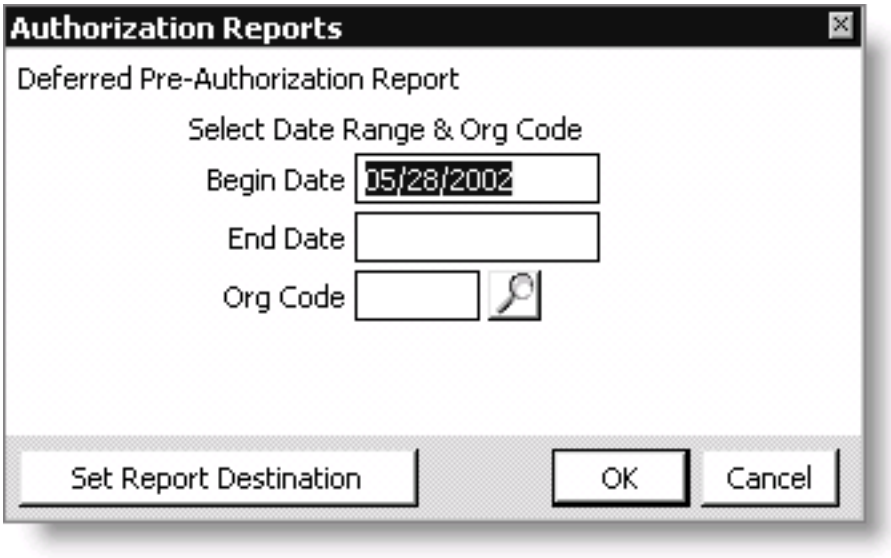
  If you are using Deferred Authorization, you can view a Pre-Authorization report of credit/debit card transactions before you transmit them to be authorized. This allows you to check and edit transactions before submitting them.

  To run the Deferred Pre-Authorization report

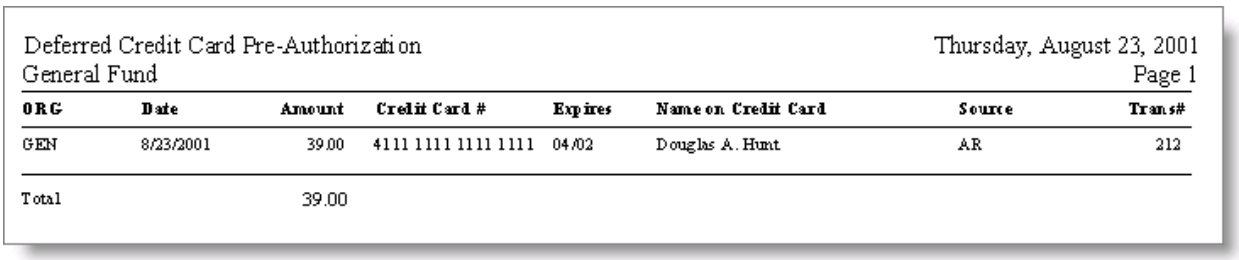
1. From AR/Cash, select Credit card reporting> Credit card reports, and click Print Deferred Pre-authorization Report. The Authorization Reports: Deferred Pre-Authorization Report

window opens.

2. Enter the Begin Date and the End Date for the date range you are evaluating. The Begin Date defaults to the current system date.
3. (optional) Enter the Org Code, or click the Find icon to select a value. If you do not enter an Org Code, the report prints for every Org Code.
4. Click Set Report Destination and select the output for the report.
5. Click OK. A Deferred Credit Card Pre-Authorization report prints based upon the specified date range and Org Code.



Selecting a Date Range & Org Code



Deferred Credit Card Pre-Authorization — Thursday, August 23, 2001
General Fund — Page 1

ORG	Date	Amount	Credit Card #	Expires	Name on Credit Card	Source	Trans#
GEN	8/23/2001	39.00	4111 1111 1111 1111	04/02	Douglas A. Hunt	AR	212
Total		39.00					

Sample Deferred Credit Card Pre-Authorization report

Submitting deferred credit card payments

Before deferred credit/debit card payments can be authorized, they must be submitted.

To submit deferred credit/debit card payments for authorization

1. From AR/Cash, select Credit card reporting> Credit card reports, and click Submit Deferred Authorizations. The Authorization Reports: Submit Deferred Authorizations window displays.
2. Enter the Begin Date and End Date of the deferred authorizations. The Begin Date defaults to the current system date, which you can override.
3. Enter the Org Code, or click the Find icon to select a value. If you do not enter an Org Code, the report prints for every Org Code.
4. Click OK.

Searching credit/debit card transactions

After you enter credit/debit card transactions, search iMIS for transactions using the Card #, the customer Id, the Trans Number, or any combination of these criteria. Credit/debit card searches are conducted through the Search credit card info window.

Unencrypted card information can be viewed in this window only if a user has an AR/Cash authorization level of 8 or higher.

Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

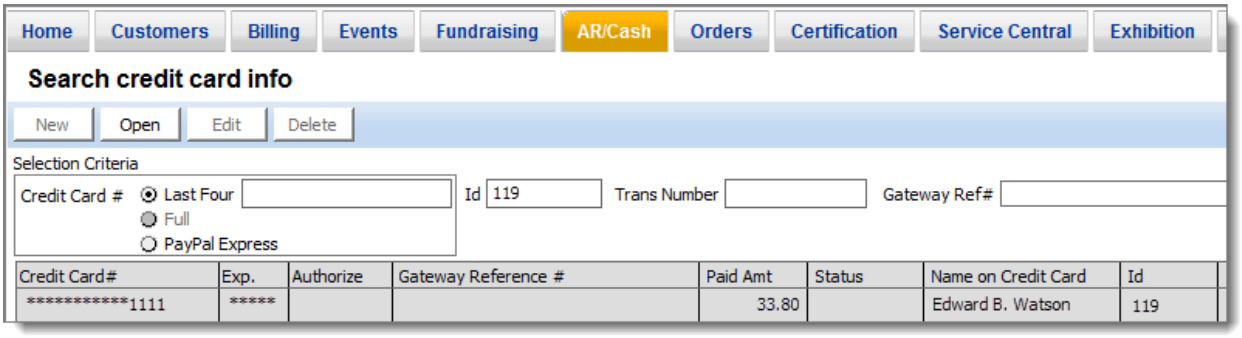
Search credit card info window

To search for credit/debit card information, from AR/Cash, select Credit card reporting > Search CC info. The Search credit card info window displays, where you can search in iMIS for credit/debit card payments by Credit Card #, customer Id, or Trans Number, or any combination of these criteria.

Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Troubleshooting

- The Status field is populated by Trans.STATUS for transactions entered through Service Central and iBO.
- When entering an order and paying by credit card over the web, the order must be processed to the invoice stage before it will display in the Search credit card info window.
- When viewing credit card transaction status, the details of the transaction are shown, not the details of the actual order payment or the event payment.



From AR/Cash, select Credit card reporting > Search CC info

Credit Card #

The credit/debit card number associated with the search

Id

The customer or company ID whose credit/debit card transactions are associated with the search

Display fields

- Credit Card # – The card numbers associated with the search
- Exp – The expiration date for each card number
- Authorize – The authorization code for the card transaction
- Paid Amt – The amount paid with the card transaction
- Status – This field indicates the authorization status of the transaction. The status options are: A (authorized), D (deferred), and C (captured). If this field is blank, it is either a

manual transaction or the transaction was denied.

- Name on Credit Card – The name on the card associated with the transaction.
- Id – The ID associated with the card transaction
- Source – This field indicates the module source for the card transaction. For example, if the payment were a fundraising gift, FR would display in this field.
- Ref # – A transaction number or order ID that is generated by the authorization gateway. This information is stored in the Description field of the transaction entry, and must be referenced in order to delete any transactions.
- Ref Date – Specifies the date the transaction was entered in iMIS

To search credit/debit card transactions

1. From AR/Cash, select Credit card reporting > Search credit card info to open the Search credit card info window.
2. Enable the Last Four option to search on the last four numbers of the credit/debit card or the Full option to search on the full card number.

   Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields. Therefore, the Full option is disabled, because only the last four credit card digits are saved.
3. Enter the card number in the Credit Card # field to search for a specific card number.
4. Enter the customer or company ID in the Id field to search by record. You search by both the card number and ID, or by one field only.
5. Enter the transaction number in the Trans Number field to search by transaction number.
6. Press Enter.

   A list of transactions for the selected card and/or customer record displays in the window.

7. To view an individual transaction through the Search credit card info window, double-click the line item. The original transaction window opens.

Authorization Gateways

iMIS supports three gateway options for credit card authorization:

1. Payflow Pro (see "Implementing Payflow Pro as an authorization gateway"), offered by PayPal, (previously Verisign), based in the United States
2. SafePay (see "Implementing SafePay as an authorization gateway"), offered by TNS (previously Dialect and QSI), based in Australia and focused on international sales
3. Custom gateways (see "Creating a custom credit card gateway"), which you can create using ASI-supplied code and documentation

   All three gateway options work with the PCI Compliance options (see "Implementing Advanced PCI Compliance options") available in AR/Cash Setup.

   Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Applying for a merchant bank account

You must apply for a merchant bank account. The merchant bank is where all the credit card transactions are verified. You can find a list of financial institutions using the authorization gateway website. However, before contacting a merchant bank, check with your bank to see if it is compatible with the authorization gateway.

Every organization accepting online credit card transactions must have a merchant account with an acquiring financial institution.

The acquiring financial institution deposits the daily credit card sales into the merchant's account after deducting applicable fees. Some acquiring financial institutions perform merchant services in-house; others outsource these functions to a third-party processor. These services may include billing, customer service, reporting, authorization, and

settlement services for merchants. A third-party processor is a company that provides credit card services to merchants on behalf of acquiring financial institutions.

Implementing Payflow Pro as an authorization gateway

Note: Payflow Pro authorizes credit card transactions up to $9,999.00.

Before you go live with card authorization using Payflow Pro (from PayPal, previously Ver-iSign), you must take several steps:

1. Ensure you have set up card authorization in iMIS.
2. Register with the Payflow Pro card authorization gateway.
3. Verify your registration setup.
4. Apply for a merchant bank account at a financial institution.
5. Submit and review test transactions.
6. The acquiring financial institution approves the application and notifies the authorization gateway.
7. Switch from test mode to live mode.

This process generally takes 2 to 4 weeks to complete.

To register for a Payflow Pro gateway

You must set up an account with PayPal (previously, VeriSign) for your Payflow Pro card authorization gateway.

1. Go to the PayPal website at www.paypal.com.
2. Select Business from the menu.
3. Under Merchant Services, select Payflow Gateway > Get Started.
4. From the Solution options, select Payflow Pro.
5. From the Country drop-down list, select your country.

6. Click Go.
7. Complete the registration.

   Note: Please make a note of your user login and password. You will need it to configure iMIS and to view reports on the PayPal website. ASI Technical Support does not have access to this information.

   To set up a Payflow Pro card authorization account

1. Select AR/Cash, Set up module, Credit Card Auth.

   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

2. Click New and select Payflow Pro from the Gateway drop-down list.

   Note: Once you save a card authorization account, you cannot change the Gateway field.

3. Specify the authorization type: Manual, Immediate, or Deferred.
4. Enter an Account Code, which will appear in the Select a Value window that opens for lookup on the CC Auth Account field on the Set up cash accounts window.

   Note: Once you save a card authorization account, you cannot change the Account Code field.

5. Enter an Account description, which will appear under the CC Auth Account field on the Set up cash accounts window.
6. Enter the Administrator's Email.
7. Enter the Partner value supplied in your account information.
8. In the Host URL field, enter the test or live mode:

- Test mode: pilot-payflowpro.paypal.com
- Live mode: payflowpro.paypal.com

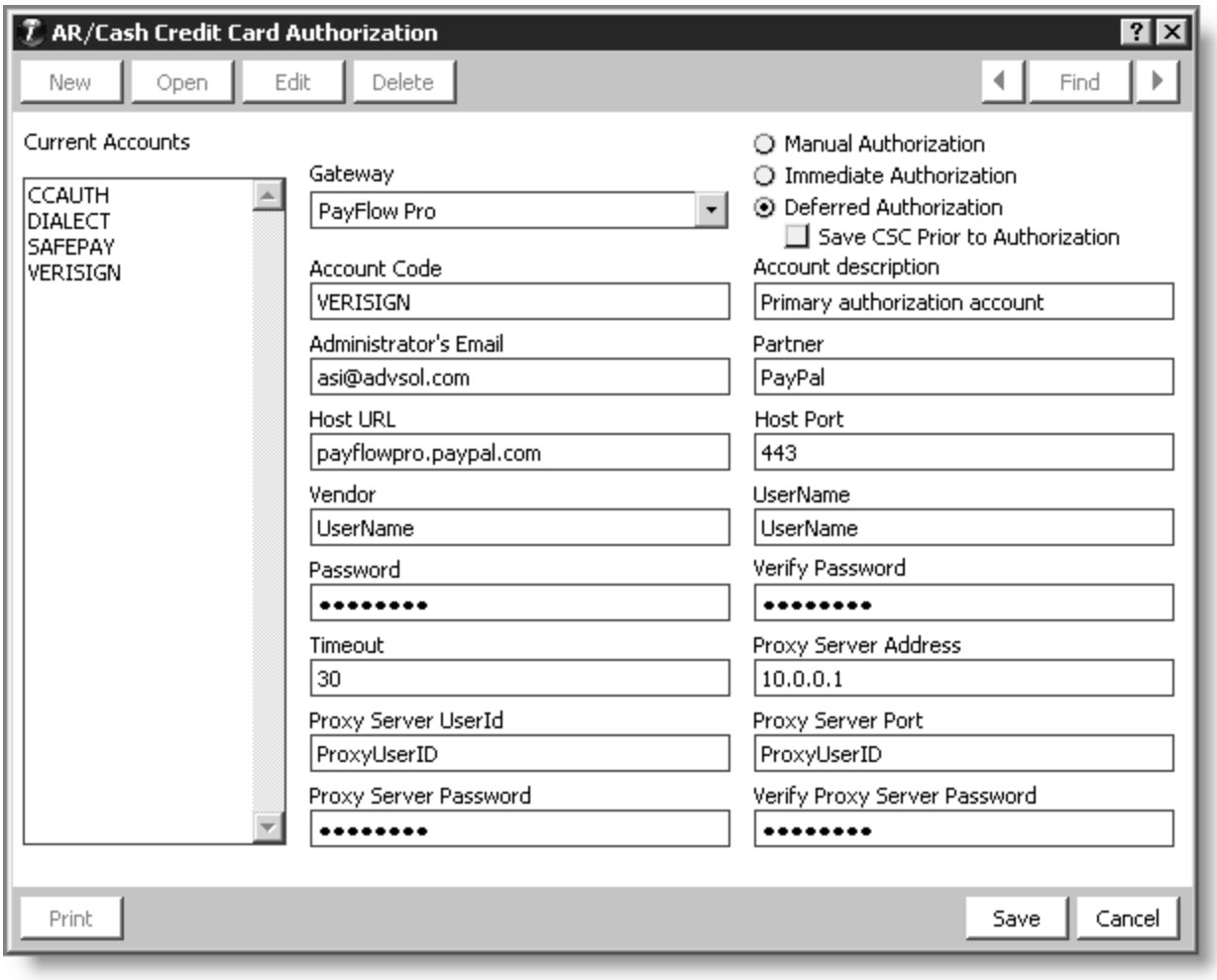
Caution! Do not go live without first setting the Host URL to test mode to verify the registration.

9. Enter 443 in the Host Port field.
10. Enter the values created during the Payflow Pro sign-up process:
    - Enter the UserName in the Vendor field.
    - Enter the UserName in the UserName field.
    - Enter the Password in the Password field and in the Verify Password field.
11. Enter 30 in the Timeout field. (This is a recommended value.)
12. If you are using a proxy server, enter the values as supplied by your network administrator:
    - Proxy Server Address
    - Proxy Server UserId
    - Proxy Server Port
    - Proxy Server Password
    - Verify Proxy Server Password
13. Click Save.
14. Repeat the steps for each account.
15. Restart iMIS.

Troubleshooting

- If you do not restart iMIS after creating a new account, all transactions will have an authorize code of “DEFER” even if you enabled the Immediate Authorization option.
- You cannot delete a card authorization account that has been assigned a cash account.
- If you change the CC Auth account for a cash account (from one gateway to another or to a different account on the same gateway) and attempt to edit or delete transactions that

were created earlier in the day before the change of the CC Auth account, there may be undesirable results, particularly if the CC Auth account was changed to a Payflow Pro account.



To associate an authorization account with a credit card cash account code

Before you can use card authorization you must set up credit card cash accounts on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts).

1. From AR/Cash, select Set up tables > Cash accounts to open the Set up cash accounts window.
2. Select a code to edit from the Current Cash Accounts list.
3. Click Edit.

4. Enter a CC Auth Account or click the Find icon to select a value.
5. Click Save.

Editing and deleting credit card payments

PayPal transaction entries are generated with a captured status. You can edit or delete payment transactions if the changes are made on the same day. If the transaction has already been charged to the credit card, an error will be reported.

iMIS assumes that authorizations are captured every night, so the changes are only allowed if it is done on the same system date as the authorization. However, the system date may not be the same as the batch date or the transaction date.

Note: Deferred payments have not been authorized and can be edited without restriction.

UNKNOWN and DECLINED Payflow Pro transactions

If you encounter an UNKNOWN status, check the Payflow Pro website to verify the transaction exists there. If the transaction does not exist there, delete the transaction from iMIS. If the transaction does exist there, run the following statement:

Update Trans

Set CC_STATUS=' ', CC_AUTHORIZE=' ',DESCRIPTION=' '

Where TRANS_NUMBER = XXXX and

TRANSACTION_TYPE = 'PAY'

To select UNKNOWN or DECLINED transactions, run the following statement:

Select BT_ID,AMOUNT,TRANSACTION_TYPE,CC_STATUS,CC_AUTHORIZE,DESCRIPTION

From Trans

Where TRANSACTION_TYPE = 'PAY' and CC_STATUS <> '' and DESCRIPTION <> ' ' and CC_AUTHORIZE in ('DECLINED','UNKNOWN')

For additional information on Payflow Pro integration, see the Payflow Pro developer's site.

Implementing SafePay as an authorization gateway

Before you “go live” with card authorization, you must complete these implementation steps and checks.

Tip: Allow two to four weeks to complete this process.

To implement a SafePay authorization gateway

1. Ensure you have set up card authorization in iMIS (see "Setting up card authorization").
2. Apply for a merchant bank account at a financial institution. The acquiring financial institution approves the application and notifies the SafePay authorization gateway.
3. Register with Safepay (see "Registering with SafePay") and obtain a test account with a payment server, Merchant ID, certificate files, payment host URL, and login/password for the payment administration web interface.
4. Verify your registration setup.
5. Install Java Virtual Machine and Java Runtime Environment (see "Installing Java Runtime Environment for SafePay").
6. Set up a SafePay Payment Client (see "To set up a SafePay payment client|topic=Installing Java Runtime Environment for SafePay").
7. (iMIS Desktop only) Submit and review test transactions in iMIS (see "To test immediate SafePay authorization|topic=Installing Java Runtime Environment for SafePay").
8. Test PaymentClient (see "Example: Testing immediate authorization") outside of the iMIS environment.
9. Set up a SafePay card authorization account (see "To set up a SafePay card authorization account|topic=Example: Testing immediate authorization").
10. Associate a credit card cash account code (see "To associate a card authorization account with a credit card cash account code|topic=Example: Testing immediate authorization").
11. Switch from test mode to live mode.

Caution! Transactions processed through SafePay cannot be edited or deleted.

Note: For SafePay-based accounts, the authorization and capture scheme is configured on the payment server, based on the requirements of the merchant bank. This means that transactions may not be captured automatically, depending on the configuration of the account. For accounts that are not set up for automatic capture, in order to perform the captures for transactions submitted for the account, you must log in to the SafePay administration interface and perform the captures manually.

Registering with SafePay

You must register with SafePay (TNS/QSI/Dialect) to obtain the account information you need.

1. Contact SafePay for the Service Agreement and Registration form.
2. Contact your bank for Internet Merchant ID (Terminal ID) for the SafePay (Dialect) Internet Credit Card Gateway.
3. Complete the registration form and contact the SafePay HelpDesk. They will set up the account for you and provide you with a merchant key.
4. Via email, SafePay will send you your account information:

- Merchant ID
- certificate files
- login/password
- payment host
- payment host URL.

Installing Java Runtime Environment for SafePay

SafePay (TNS/Dialect) requires the Java Runtime Environment (JRE) to be installed:

- To run the Payment Server, install JRE 1.3.1 or higher on your iMIS application server.
- Before setting up the PaymentClient, install JRE 1.3.1 or higher.

You can download the current JRE version from java.com.

To set up a SafePay payment client

To accept Safepay payments through iMIS Web or Public views, you must install the Safepay client software on the appserver itself, which does the processing for the gateway. Perform the following steps on iMIS Desktop:

1. Obtain the setup files from SafePay or ASI Technical Support and copy them to a temporary local directory.
2. (Windows 2008) To install the client on Windows 2008, disable Data Execution Prevention (DEP) for everything except System Processes.
3. (Windows 2003) Change the setup file's properties to run as compatible with Windows 2000 (right-click the file, select Properties, and select the Compatibility tab).
4. Run the setup as directed by SafePay.
5. Restart your machine when the installation successfully completes.
6. Verify the settings in your setup.properties file, as directed by SafePay.
7. (optional) To test PaymentClient outside of iMIS, in the CardNumbers.profile file, ensure that any expiryDate values match the expiration dates of any test credit card numbers provided to you by SafePay.

   To test the SafePay client outside of iMIS

   You can test the SafePay client, PaymentClient, outside of the iMIS Desktop environment. Be sure to adjust your PaymentClient settings so that the test card numbers will be authorized:

1. Locate the \config directory within the \PaymentClient installation directory.
2. Edit the CardNumbers.profile file.
3. Ensure that any expiryDate values match the expiration dates of any test credit card numbers provided to you by SafePay.

   To test immediate SafePay authorization

Before you test, make sure that you are licensed in iMIS for credit card authorization (CCAUTH) and that the Immediate Authorization option is selected on the AR/Cash Credit Card Authorization window (AR/Cash > Set up module, Credit Card Auth).

Use the following credit card numbers for testing purposes:

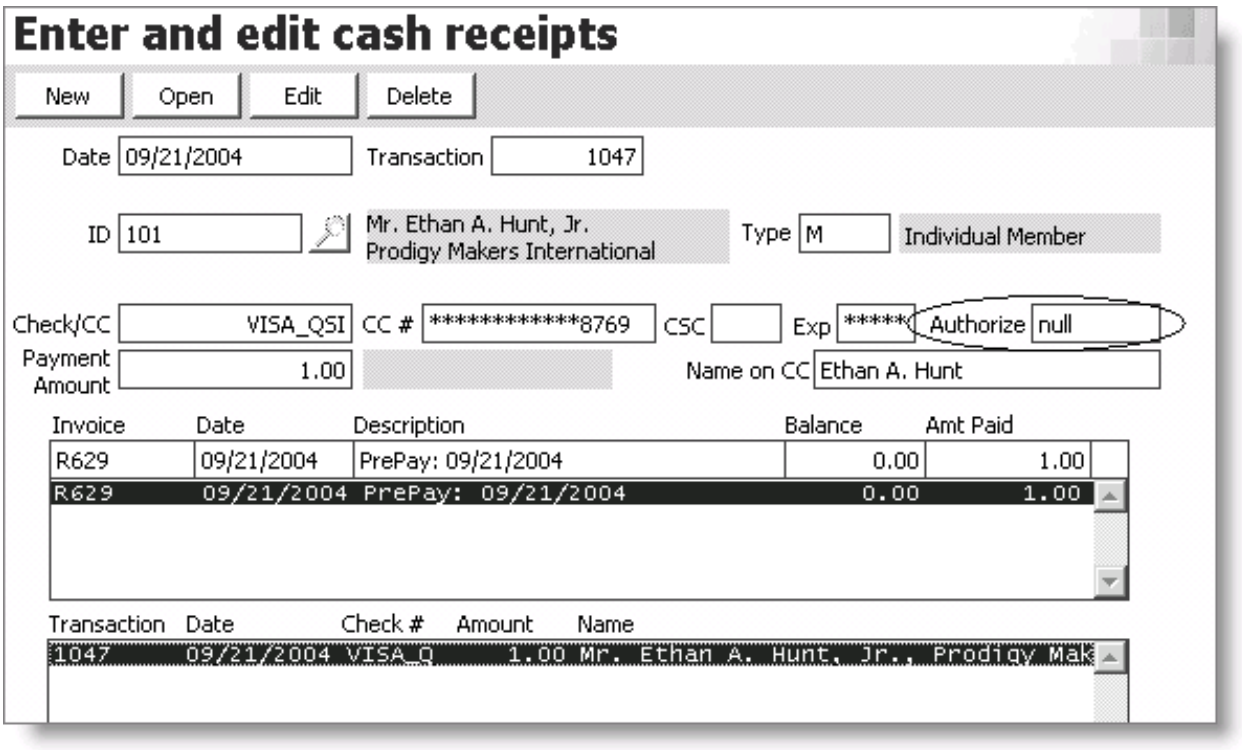
- Master Card: 5123 4567 8901 2346 (05/13)
- VISA: 4987 6543 2109 8769 (05/13)
- American Express: 3456 7890 1234 564 (05/13)
- Diners Club 3012 3456 7890 19 (05/13)

1. Select AR/Cash > Enter and edit transactions > Cash receipts.
2. Click New.
3. When entering a payment, enter one of the test credit card codes in the Check/CC field. A CC # and additional data entry fields display.
4. Enter the test credit card number in the CC # field.
5. If required, enter a Card Security Code in the CSC field.
6. Enter an expiration date in the Exp field.
7. Enter the name on the credit card in the Name on CC field. This need not be the same as the customer name.
8. Enter a dollar amount in the Payment Amount field.
9. Click Save.

   The Authorize field displays a status code of either a deferred status (DEFER), a unique authorization code (if your financial institution returns an authorization code), or DECLINED or UNKNOWN if the credit card is not authorized by SafePay. In addition, if you entered a value in the CSC field, the field is now blank because iMIS automatically deletes the value once the transaction has been submitted.

   Notes

- If your financial institution does not return unique authorization codes, the Authorize field will contain null.
- The criteria for authorization depend upon the policy of the acquiring financial institution.



Testing immediate credit card authorization with CCAuth

Example: Testing immediate authorization

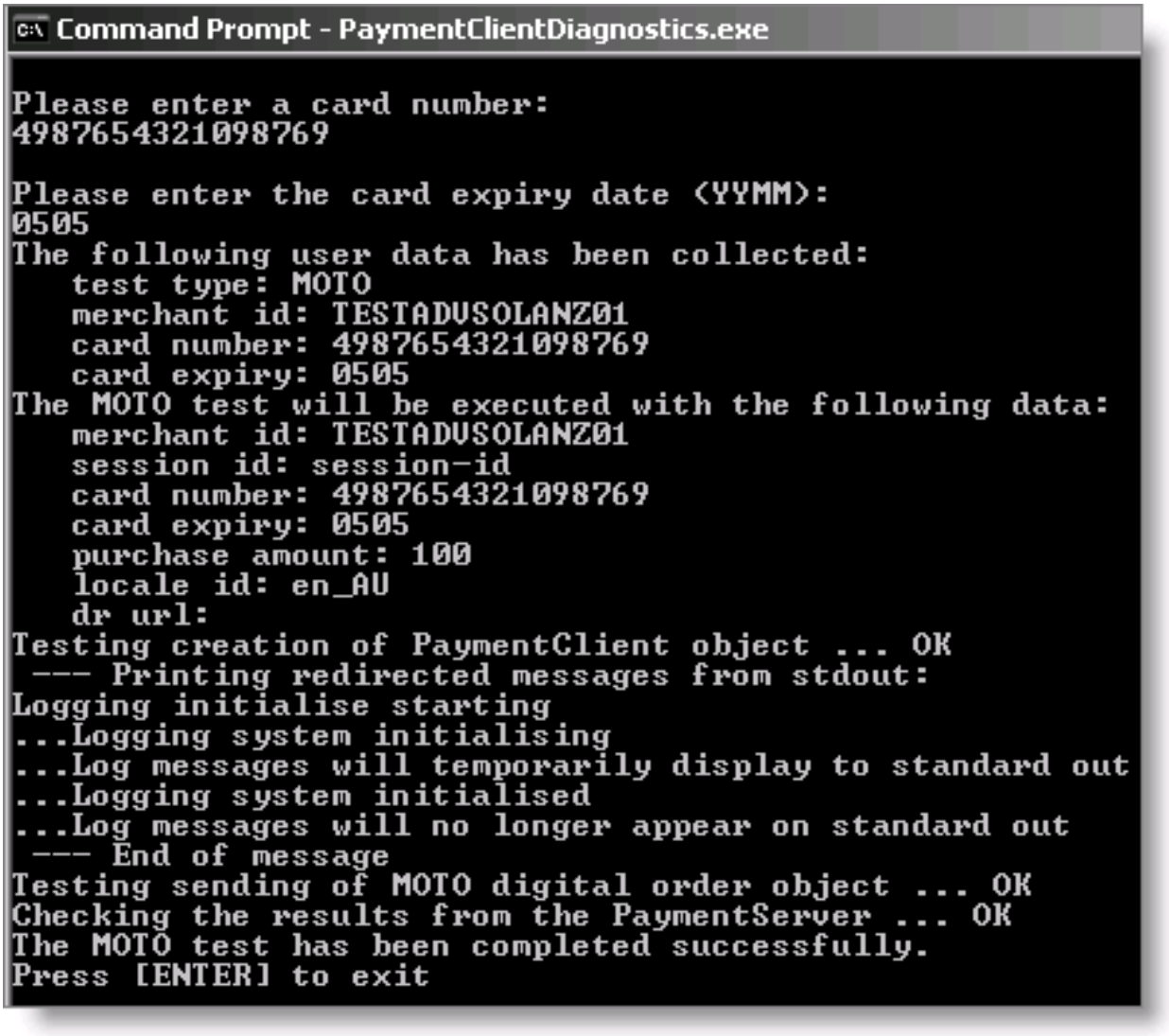
This example tests SafePay connections using the command line test tool provided with the payment client. Check with your gateway provider for the latest testing tools and procedures.

1. Ensure the service is running: Select Control Panel > Administrative Tools > Services, look for Dialect PCService in the Service Console, and ensure that it is Started.
2. Test connectivity by selecting Start > Programs > Dialect > PaymentClient > Test Payment Client.

   The Payment Client Diagnostics program retrieves and displays client configuration information and prompts you to enter transaction information.

3. Select 1 for MOTO.
4. Enter the Merchant ID provided with your account information.
5. Select a credit card number or enter Z to enter another credit card number.
6. Enter the credit card expiration date (format: YYMM).

   The diagnostic program tests the PaymentClient configuration and displays test results on the screen.



Example of a successful test transaction

To set up a SafePay card authorization account

1. Select AR/Cash, Set up module, Credit Card Auth.

   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

2. Click New and select SafePay from the Gateway drop-down list.

   Note: When editing card authorization accounts, you cannot modify the values for the Gateway or Account Code field.

3. Enable the Manual Authorization, Immediate Authorization, or Deferred Authorization option.

4. Enter an Account Code. This value displays in the Select a Value window that opens when you click the Find icon on the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.

   Note: When editing card authorization accounts, you cannot modify the values for the Gateway or Account Code field.

5. Enter a description for the account in the Account description field. If you enter a value in this field, it displays as read-only data under the CC Auth Account field on the Set up cash accounts window.

6. Enter the Administrator's Email.

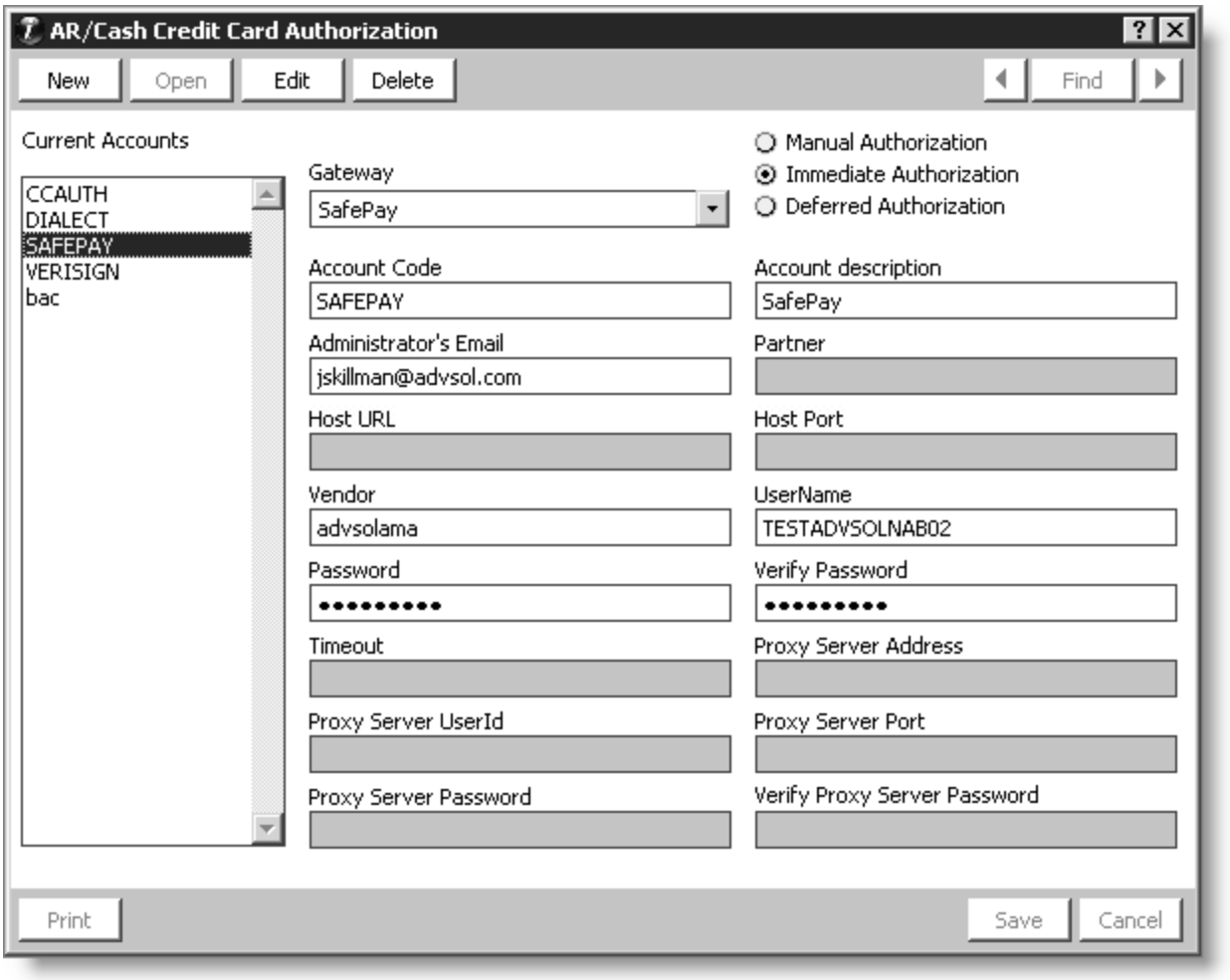
7. (optional) Enter the Merchant Administration login (username) you were given in the Vendor field.

8. Enter the Merchant ID obtained during set up in the UserName field.

9. Enter the Merchant Administration password you were given in the Password and Verify Password fields.

10. Click Save.

11. Restart iMIS.



Configuring QSI Authorization

Note: If you do not restart iMIS after creating a new account, all transactions will have an authorize code of “DEFER” even if you enabled the Immediate Authorization option.

Note: You cannot delete a card authorization account that has been assigned a cash account.

Note: Transactions processed through QSI cannot be edited or deleted.

Note: If you change the CC Auth account for a cash account (from one gateway to another or to a different account on the same gateway) and attempt to edit or delete transactions that were created earlier in the day before the change of the CC Auth account,

there may be undesirable results, particularly if the CC Auth account was changed to a VeriSign account.

To associate a card authorization account with a credit card cash account code

Before you can use card authorization you must set up credit card accounts on the Set up cash accounts window (from AR/Cash, select Set up tables > Cash accounts).

1. From AR/Cash, select Set up tables > Cash accounts to open the Set up cash accounts window.
2. Select a code to edit from the Current Cash Accounts list.
3. Click Edit.
4. Enter a CC Auth Account or click the Find icon to select a value.
5. Click Save.

Managing SafePay transactions

With SafePay, you cannot edit/delete existing transactions or enter refunds (enter payments with negative amounts).

The authorization and capture schema is configured on the payment server, based on the requirements of the merchant bank; this means that transactions may not be captured automatically, as it depends on the configuration of the account.

For accounts that are set up for automatic capture, you must log into the administration interface and capture the transactions manually in order to perform the captures for transactions submitted for the account.

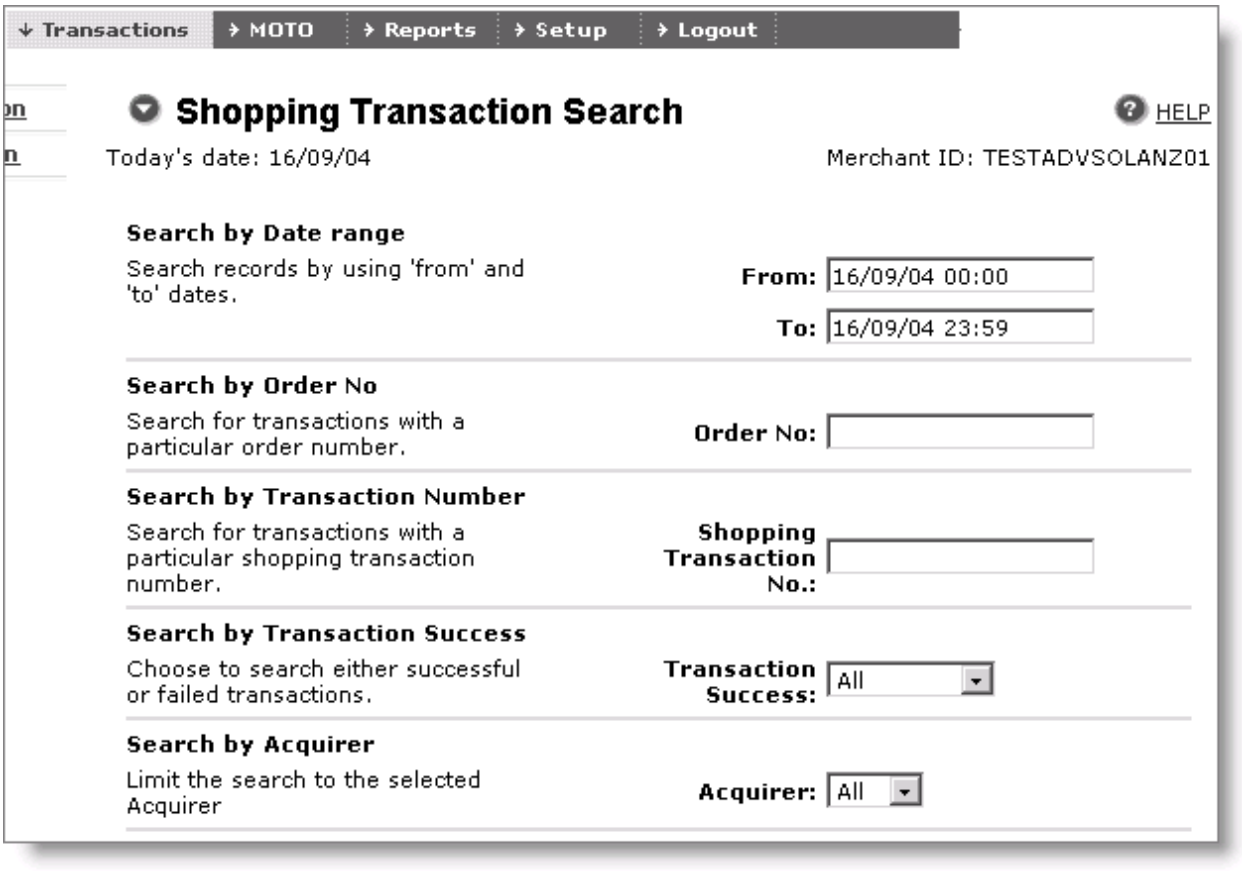
Note: Regardless of the authorization/capture schema, iMIS creates all Trans entries for SafePay-based transactions with the Trans.CC_Status column value = 'C' (in the same manner as Payflow Pro).

To view submitted transactions

1. Go to the merchant account site.

2. Enter your merchant ID, login, and password.
3. Select the Transactions menu.

   A window similar to the following displays:



Go to https://secure.dialectsolutions.com/DPS/MA

Creating a custom credit card gateway

If you choose not to use Payflow Pro or SafePay, you can create a custom credit card gateway. The same connection parameters that are available for a Payflow Pro gateway are also available for a custom gateway. This includes all of the authorization modes and settings on the AR/Cash Credit Card Authorization window.

iMIS Web views

A .NET developer can write a custom gateway for the web views of iMIS. Templates and documentation are available from iMIS Community's SDK Center.

iMIS Desktop

An Xtender developer can use Visual Basic to write a custom gateway for iMIS Desktop. Templates and documentation are available from the iMIS Support community under Extension Products. Instructions for customizing the gateway are in the documentation and the control files. The Xtender developer must define and carefully document which of the fields should be populated, if any, and for what purpose.

Installing a custom credit card authorization gateway

Before implementing a custom gateway, the developer must install the new application in a test environment. The application must be installed on each iMIS Desktop workstation from which payments are entered.

After the custom gateway application is installed you must:

1. Create a new Credit Card Authorization account (see "Setting up a custom credit card authorization account") (AR/Cash > Set up module > Credit card authorization).
2. Set up a Cash Account (AR/Cash > Set up table > Tables > Cash Accounts) for a Type, Credit Card or Debit Card, that uses the newly defined Credit Card Authorization account.

Setting up a custom credit card authorization account

To configure iMIS to use an Xtender application that a developer has created for a custom credit card gateway (see "Creating a custom credit card gateway"), you must setup a credit card authorization account.

Note: Only two fields are required for the custom gateway: Account Code and Account Description. The remaining fields are available for connection parameters. Your developer can use the data entered to these fields for other purposes, or not at all.

Caution! The labels on the fields may not correspond to the data you need to enter. Check with your developer to find out whether these fields require special data for the custom gateway.

1. Select AR/Cash > Set up module, Credit Card Auth.

Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

2. Click New and select Custom from the Gateway drop-down list.
3. Enable the Immediate Authorization, or Deferred Authorization option.
4. Enter an Account Code. This value displays in the Select a Value window that opens when you click the Find icon in the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.
5. Enter a description for the account in the Account description field. If you enter a value in this field, it displays as read-only data under the CC Auth Account field on the Set up cash accounts window.

Troubleshooting the installation for custom gateway

If the custom gateway application is not installed or is installed incorrectly on iMIS Desktop, the transaction will fail. When a user attempts to save a payment transaction that is dependent on the custom gateway, the authorization process will time out for that transaction. iMIS informs the user that the payment cannot be authorized because the gateway application is not installed correctly.

- This message is presented first.

  Custom Gateway not properly installed

  The payment type entered for this transaction requires a Custom Gateway for credit card authorizations. The custom gateway is not properly installed on this workstation.

  The authorization for this payment transaction will time out.

  Please contact your system administrator or the developer of your custom gateway application before processing payments using the specified payment type.

  Note: An error message identifier, nCCAuthOnly_Custom, at the bottom of this message informs Technical Support that this is not an iMIS issue.

- After the user clicks OK in the Custom Gateway not properly installed message box, a standard iMIS warning is provided.

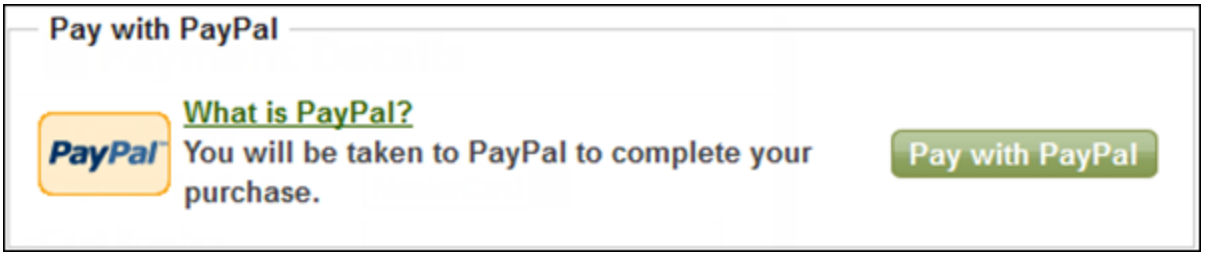
  The authorization process timed out. Please contact your system administrator.

Payments in iMIS

Note: This document will ask the user to use the iMIS Staff site and the iMIS Administrative Console to configure and administer payment functionality for iMIS. Also, the user may be asked to access locations outside of both the iMIS Staff site and the iMIS Administrative Console.

PayPal Express Checkout Integration

If you already accept credit cards online, you can set up Express Checkout with PayPal to integrate with your iPart-based sites. This additional payment option is a convenience for your members, customers, registrants, and donors, which means more revenue for your organization. This option also reduces your liability for holding cardholder data, because their credit card information is stored securely at PayPal.



The Pay with PayPal block appears in the Payment Creator iPart if you set up a cash account as a PayPal service.

PayPal payments can apply to a full range of items offered in iMIS sites:

- Products and product kits
- Event registrations
- Renewal invoices, for both accrual and cash dues
- Donations

iMIS handles PayPal Express Checkout differently for products that are not shipped:

- Shippable items (products and kits) require a deliverable address, which both iMIS and PayPal verify. iMIS sends the contact's name and address to PayPal, which displays the

information on its site for the payer to verify.

- Non-shippable items (renewals, registrations, donations) require no delivery address, so none is sent to PayPal. Because of this, PayPal displays the name and address of the payer that it has on file, which may differ from the name and address stored in iMIS.

  Your site visitors can complete transactions quickly and easily without entering credit card information:

1. After adding all items to their cart (or completing a standalone donation), users click Check out with PayPal.
2. They redirect to PayPal and sign in, where they complete their payment:

- see their payment item details
- review their shipping info
- select their method and complete payment

3. PayPal automatically returns the necessary information needed to confirm and fulfill the order. Your customer is returned to your website to view their confirmation.

   You can set up style elements in your PayPal account so that customers will feel comfortable that it is a continuation of their shopping experience from your site.

Note: The Pay with PayPal option is hidden whenever the signed-in user works On Behalf Of another.

Setting up PayPal Express Checkout

Once your organization establishes a PayPal Business or Premiere account, you can integrate PayPal Express into iMIS to offer a preferred payment option to your site visitors. Setting this up involves creating your sandbox account with PayPal, creating the PayPal service in iMIS, and testing transactions between iMIS and PayPal.

These resources on the PayPal Developer site (www.X.com) will help your organization implement the service:

- Products > Express Checkout
- Getting Started Guides > Express Checkout API

To enable the service with PayPal

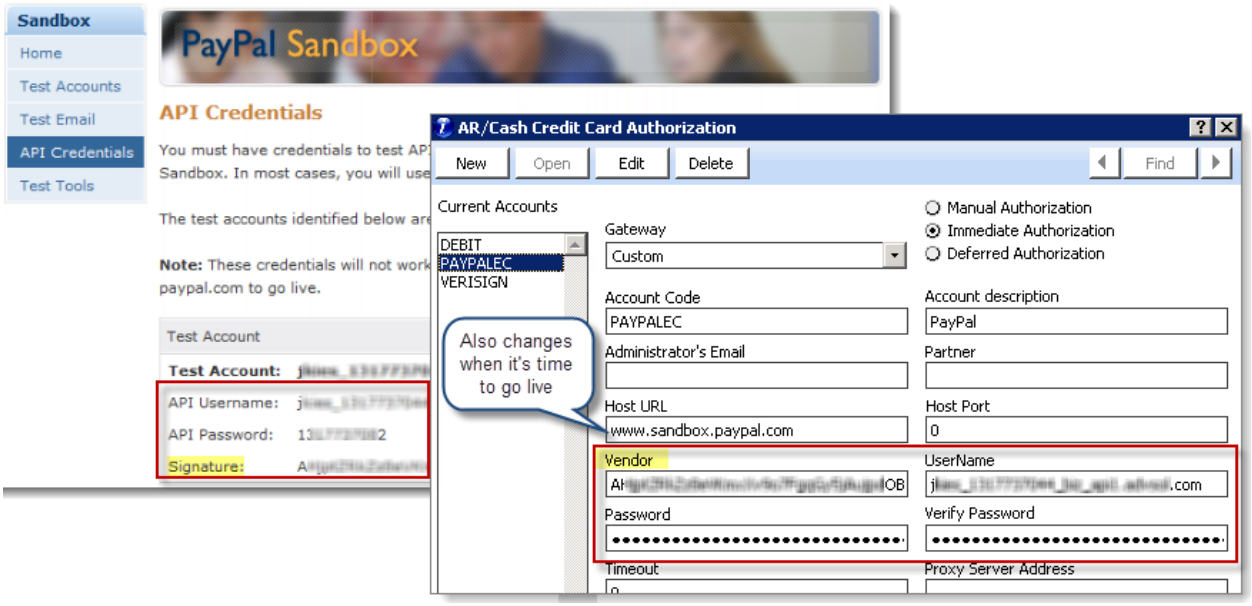
1. Sign up for Express Checkout. Log in, or select Create New Account.

   Important: Express Checkout requires a Business or Premier account.

2. Set up a PayPal Sandbox account to use for testing, with at least two test accounts:

- A merchant account to represent your organization
- A personal account to represent your buyer

3. Sign into your sandbox account, click API Credentials to collect the information you need to enter into iMIS to begin your setup and testing:



To set up PayPal authorization in iMIS

Keep in mind that you will be moving between test (sandbox) mode and live mode, which requires a different Host URL and set of PayPal API Credentials. Before you begin your iMIS testing, remember that you must be signed in on the PayPal sandbox site.

Tip: Keep a separate instance of iMIS configured to use your sandbox settings, for ongoing testing.

1. From Admin Console, select Accounting > Options > Configure accounting options.
2. Click Credit Card Auth. Under Current Accounts, select PAYPALEC.

   If the PayPal account does not exist, create it:

1. Click New.
2. Add a Custom gateway with an Account Code of PAYPALEC, set for Immediate Authorization.
3. Set the PAYPALEC account values for your organization, and click Save.

- In Host URL, enter the appropriate PayPal URL: www.sandbox.paypal.com (test) or www.paypal.com (live)
- Enter your organization's values for Vendor (the API Signature for your PayPal account), UserName, and Password.

  Troubleshooting: If you get an error, verify that all of the cases match and remove any trailing spaces from these fields.

4. In Accounting > Options > Set up tables > Set up cash accounts, add a cash account with these features:

- Code: W_PAYPAL

  Important: The code must begin with the prefix defined in the Staff site:

  Go to RiSE > Set up web components > General configuration > Credit card prefix:

  This defaults to W_. This makes the account available to public users on the web.
- Title: PayPal (case-sensitive)
- Type: Service
- CC Auth Account: PAYPALEC

5. To enable PayPal as a payment option on the web for staff users, add an additional cash account in Accounting > Options > Set up tables > Set up cash accounts with the following features:

- Code: PAYPAL
- Title: PayPal (case-sensitive)
- Type: Service
- CC Auth Account: PAYPALEC

6. Verify that your web.config includes PayPal as a payment gateway provider, and that the authorization account code matches what you defined above:

   <add name="PayPalPaymentGatewayProvider" type-e="Asi.PaymentGateway.PayPalPaymentGatewayProvider, PayPalPaymentGatewayProvider" authorizationAccounts="PAYPALEC" />

7. If you are designing your own checkout pages, be sure that the Payment Creator and Submit Order Button iParts are on same page.

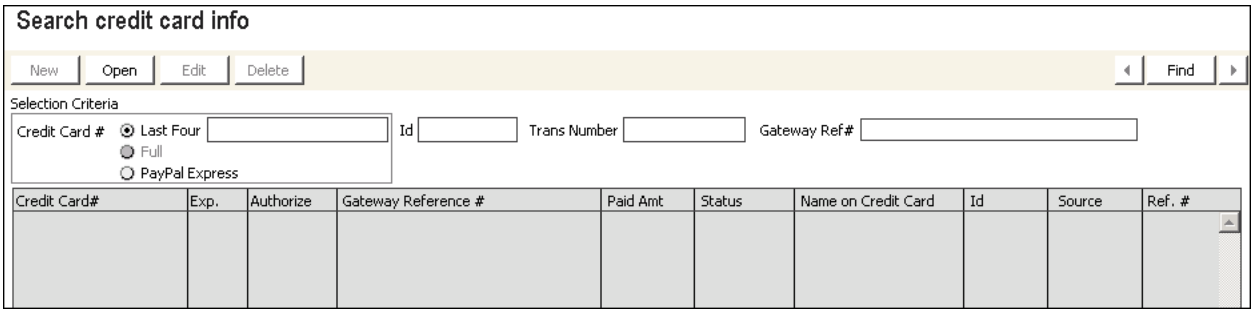
   To test the PayPal service

   Important: Open your PayPal sandbox test site.

1. Browse to developer.paypal.com and log in to your Business or Premier account.
2. From the navigation at left, select Sandbox accounts.
3. Choose a test account (such as the Business test account) and click Sandbox site to enter the sandbox test site.
4. On your iMIS site, complete a PayPal transaction:

1. Put an item in your cart. When configured correctly, the Pay with PayPal panel appears directly above the payment methods drop-down in the Cart and on the Give & Go page.
2. Click Pay with PayPal, which redirects to the PayPal site.
3. Log into PayPal with your personal test account, not your business account.

4. Verify that your order details appear on the PayPal site, and click on Pay Now to complete the transaction. PayPal redirects you to the confirmation page in iMIS.
5. Verify that the transaction information was stored correctly in iMIS:
6. In Admin Console, go to Accounting > Transactions > Search credit card info.
7. To find the transaction, specify PayPal Express.
8. Enter the iMIS Id, Trans Number, or Gateway Ref#, which contains the Transaction ID that PayPal assigned.



Restricting payment methods to PayPal only

If you want to switch to accepting payment through PayPal Checkout Express only for public users, you can easily reconfigure iMIS so that the Payment Creator allows payment through PayPal alone.

Note: These steps will restrict payment methods to PayPal alone only for public users. Staff users will still see other payment methods as defined in Accounting > Options > Set up tables > Set up cash accounts.

To change cash accounts to support PayPal only

To achieve PayPal-only payments, you need to configure iMIS so that PayPal is the only web-enabled cash account. The following is a quick way to achieve this for public users without deleting any existing credit card accounts:

Go to RiSE > Set up web components > General configuration:

1. For Credit card prefix, change the default value W_ to another value, such as Z_. This has the effect of hiding all of your existing W_ cash accounts from the Payment Creator.
2. In Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts.
3. Add a cash account that is a copy of your W_PAYPAL account, named Z_PAYPAL. This new account must point to your existing PAYPALEC authorization account.
4. View your site and add an item to the cart to verify that Payment Creator is hiding the credit card options.

   Tip: To re-enable credit card processing, simply repeat the first two steps and restore the value W_.

Using PayPal for standalone donations

The Payment Creator iPart supports the PayPal Express Checkout panel when it appears outside of the context of the shopping cart, on a standalone donation page. The PayPal integration preserves any entries in the Display Name Editor (List As) and Tribute Gift Editor iParts. The PayPal option can enhance your campaign success by giving your site visitors the reassurance of a known and secure payment method.

Note: On contact account pages, the Giving History iPart lists donations paid using PayPal as having a Type of Cash.

See iParts for donation features in iPart Essentials for details on setting up standalone donations.

Auditing PayPal payments

To reconcile transactions in your iMIS database with the PayPal Express entries, use the transactions report to obtain the Transaction IDs, Gross and Net amounts, dates, and PayerIDs. On the PayPal site, you can look up a PayerID to identify the purchaser.

To reconcile transactions in your iMIS database with the reports in PayPal, look at the Transaction ID that appears in the Details for an entry on the Overview page.

Tip: Keep in mind that it is possible for addresses and even names to differ between iMIS and PayPal for a single Transaction ID. The Transaction ID in the merchant account listing is what pairs the two.

To retrieve audit details from PayPal

1. Log on to paypal.com using your seller account.
2. Select your account and enter the site.
3. Locate the most recent transaction, verifying that the amount matches the order.
4. Click the Details link for that line.
5. Click Unique Transaction ID # that appears next to the text Express Checkout Payment Received.
6. In Admin Console, look up the values as appropriate:

- Go to Orders > Open an order > Payments tab, Gateway Ref#
- Events > Register a customer > Open a registration > Payments tab, Gateway Ref#
- AR/Cash > Credit card reporting > Search CC Info, any combination of iMIS ID, iMIS Trans ID, and Gateway Ref#
- (for future release) AR/Cash > Generate Reports > Credit Card > Credit Card Post Authorization Report (Crystal) returns the results for CC Auth Acct of PayPal (which is tied to cash accounts with a type of Service).

Refunding PayPal payments

Refunding customer payments always involves iMIS Admin Console, where you cancel out the payments and issue refunds. When PayPal is the payment method, refunds must be made using PayPal as well.

Important: The only time that both iMIS and PayPal process payments automatically is when they are first entered by customers on your site. Any subsequent transactions affecting that payment must be entered manually into both PayPal and iMIS Desktop.

Reversing a PayPal payment (such as to remove payment for a registration) require the following two steps:

1. PayPal: Log in to PayPal and process the refund using PayPal's standard procedures.
2. Admin Console: Go to Accounting > Transactions > Enter and edit cash receipts and create a new payment to cancel the prior one:

- Enter the following:
- ID
- PayPal cash account (typically W_PayPal) in the Check/CC field
- negative payment amount
- Apply the negative payment to the original transaction:
- Edit the transaction.
- Enter a negative amount in the Amt Paid field, so that it has a balance due.

If the transaction will not be paid by another method and you need to reverse the original purchase, use the normal procedures to cancel a registration/order/donation.

Authorizing Credit Cards in iMIS

Card authorization is the process of obtaining payment authorization when a credit/debit card transaction is entered. Credit/debit card transactions can be authorized across these areas of iMIS:

- AR/Cash: Sales transactions and cash receipts windows
- Billing: Dues and subscriptions payments
- Fundraising: Gifts, pledges, and fundraising payments

- Service Central: Payment entries
- Public view: Events registration and order entry

Card Authorization allows you to search by card number or customer ID to find credit/debit card transactions throughout iMIS.

Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Card authorization requirements

iMIS ships with the card authorization and Service Central modules. To use card authorization in iMIS, you need the CCAUTH license key. You also need a high-speed Internet connection to handle a high volume of transactions.

To use card authorization, you must:

1. Set up a merchant account at your bank or another financial institution.
2. Set up a payment processing account. Your payment processor must be supported by your payment gateway service. If you are doing business outside of the United States, use a payment processor that handles international currencies.
3. Register with a payment gateway service and install additional gateway software as required. iMIS natively supports Payflow Pro (see "Implementing Payflow Pro as an authorization gateway"), offered by PayPal, (previously Verisign), and TNSPay (see "Implementing TNSPay as an authorization gateway"), offered by TNS), which handles international sales, and Moneris (see "Implementing Moneris as an authorization gateway"), offered by Moneris Solutions, based in Canada and focused on Canadian sales.

   Note: European debit card transactions in iMIS cannot be processed with either gateway. Instead, your AiSP must implement a custom gateway interface.

   Before you take any of these steps, you should understand what card authorization is and how it works.

The card authorization process

Card authorization allows you to accept a credit/debit card payment from a customer and, within a matter of seconds, have the card transaction approved over the Internet by your bank. You also have the option of having transactions deferred for authorization at a later time.

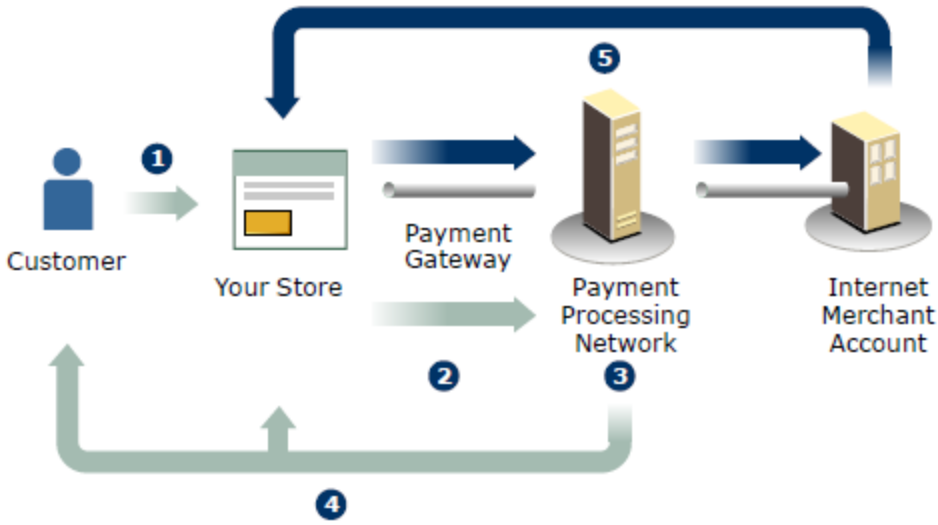


Diagram and steps from PayPal

Credit card authorization includes the following steps:

1. A customer purchases a product or service from a store.
2. The payment gateway encrypts data and securely sends it through the payment processing network.
3. The transaction is reviewed for authorization or decline, and the results are sent back through the payment gateway.
4. The customer receives a confirmation receipt and the order is fulfilled.
5. Once the transaction is processed, funds are transferred from the customer's bank account to the merchant bank account.

Card authorization terms

Before you get started, it is a good idea to become familiar with some of the terms that are used throughout this section. The following is a list of some of the most commonly used terms.

Acquiring financial institution

An acquiring financial institution is a bank or other financial organization that contracts with banks and merchants to allow merchants to accept card transactions. Some financial institutions perform merchant services; others outsource these services to a third-party processor.

Authorization

An authorization is an electronic request for approval of the sale that is sent to the financial institution that issued the customer's credit/debit card. Authorization options in iMIS include Manual, Immediate, and Deferred. Manual is the default authorization setting.

Batch (CC Auth)

A batch is an accumulation of card transaction authorizations that are awaiting settlement.

Capture

A capture is the process of submitting a credit/debit card sale for financial settlement. When a transaction is captured, the sale amount is credited to your deposit account through your acquiring financial institution and posted to the cardholder's credit/debit card account. This transaction usually occurs after midnight when authorizations for the previous day are batched.

Card authorization gateway

A card authorization gateway is a third-party credit/debit card interface, similar to an automated point-of-sale system that provides a front end to financial networks, financial insti-

tutions, and payment processors, which allows merchants to provide credit/debit card authorization to their clients.

Card Security Code (CSC)

The 3- or 4-digit, unembossed number that displays on the front or back of a credit/debit card; often used as an added measure of verification for card transactions. The Card Security Code (CSC) is not part of the actual card number.

DBA name

(Doing Business As) A DBA name is the name used to identify the business, as opposed to the business' legal name.

Deferred authorization

Deferred authorization is transaction information that is saved for later processing.

Manual authorization

Manual authorization option enables a system licensed for card authorization to turn off automatic authorization.

Editing

Editing is the process of changing the payment information for a transaction in the Trans database table in iMIS.

Flag

To flag is to mark a transaction to be processed later.

Immediate authorization

With immediate authorization, the payment information is sent immediately to the gateway for authorization (and for later capture) when a credit/debit card transaction is entered.

Issue date

The 5-character date (mm/yy format) date of issue that is printed on certain European debit cards, used for authentication.

Issue number

The 1- or 2-digit number that is printed on certain European debit cards, which indicate how many versions of the card have been issued to the cardholder. This value is used for authentication.

Issuing financial institution

An issuing financial institution extends credit to a customer through credit card accounts or provides electronic account debits through debit cards. The issuing financial institution issues a credit card and bills the consumer against the credit card account. An issuing financial institution is also referred to as the cardholder's financial institution or issuer.

Merchant account

The account that collects the funds from a credit/debit card transaction. The merchant account receives the funds after the capture is complete.

Submit

Submit is the process of sending deferred credit/debit card transactions to a gateway for authorization.

Settlement

Settlement is the process in which an electronic credit card transaction is settled between your acquiring financial institution and the customer's credit card issuing financial institution. Your acquiring financial institution credits your account for the credit card sale and the sale is posted to the customer's credit card account.

User account

The account that is debited after an authorized credit/debit card transaction is captured.

Void

A void is a deleted payment transaction. The transaction can then be replaced with a new transaction.

Setting up card authorization

Note: If you are creating a custom gateway, see Creating a custom credit card gateway.

Installing iMIS and adding license keys

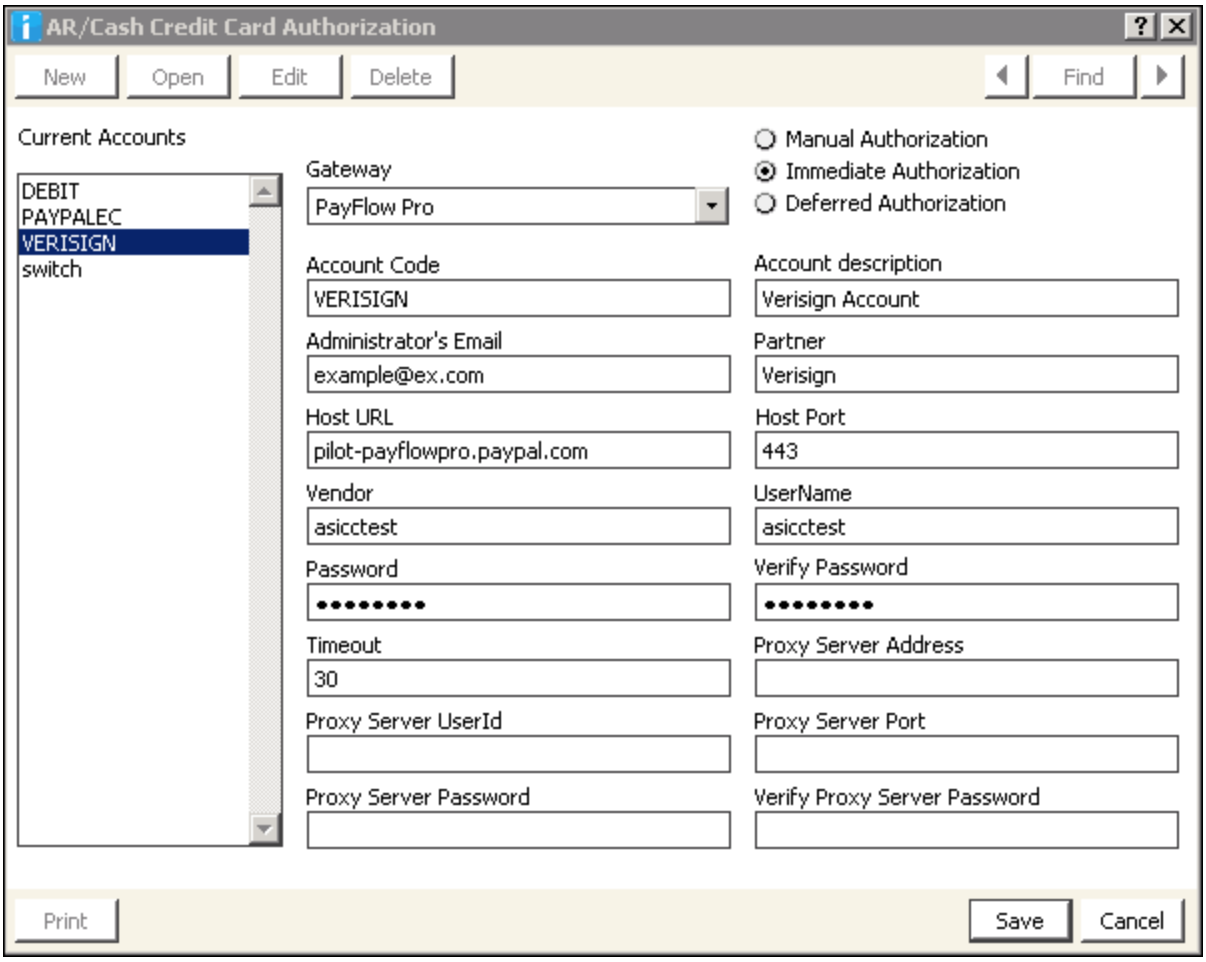
The first step in getting started is to install iMIS, which includes the components needed to run card authorization. However, you must have the CCAUTH license key in your system before you can use this function.

Note: To set up card authorization, you need a relevant license, such as CCAuth or Service Central.

AR/Cash Credit Card Authorization window

This window specifies authorization options for credit cards and European debit cards.

In Admin Console, go to Accounting > Options > Configure accounting options, and click Credit Card Auth.



Current Accounts

Lists the currently defined card authorization accounts.

Gateway

Lists the authorization gateways supported by iMIS:

- TNSPay – authorizes international credit cards.
- Payflow Pro – authorizes domestic credit cards.
- Moneris – authorizes Canadian credit cards.
- Other – for European debit cards, enables storage of encrypted CSC values and unencrypted issue number and issue date values so that a custom gateway for deferred

authorization of European debit card transactions can be implemented.

- Custom – custom gateways you can write and install on your system.

  Authorization options

  Specifies the type of authorization that will be performed for all credit/debit card cash accounts that use this card authorization account.

- Manual Authorization – Disables automated authorization through a gateway. The payment information can be edited or deleted at any time until invoiced.
- Immediate Authorization (Payflow Pro and TNSPay gateways only) – Performs automated authorization through a gateway. Payment information can be edited or deleted the same day only. Because the Other gateway is not supported, immediate authorization cannot be used for European debit card transactions. The following authorization process is used:

1. Credit card payment is entered.
2. Credit card information is immediately sent for authorization.
3. Authorization is returned and transaction is saved for later capture.
4. Transaction is saved and completed.

- Deferred Authorization – Performs automated authorization through a gateway. Payment information can be edited or deleted until the transaction is captured. The following authorization process is used:

1. Credit/debit card payment is entered.
2. Transaction information is saved for later batch processing.
3. Transactions are periodically sent in a batch for authorization and capture.
4. Transactions in the batch are saved and completed.

   Save CSC Prior to Authorization

(only for Deferred Authorization) Saves the card security code (CSC) value in an encrypted format in the iMIS database, so that the CSC information can be sent with all other transaction information in the batch for deferred authorization.

If the associated Gateway is Payflow Pro or TNSPay, iMIS automatically deletes the saved CSC information after successful deferred authorization. If the associated gateway is Other, however, the custom gateway implemented by your AiSP for European debit card authorization is responsible for ensuring that the saved CSC information is deleted from your iMIS database.

Account Code

Specifies a short name for the account.

Account description

(optional) Specifies a description for the account.

Administrator's Email

(Payflow Pro and TNSPay gateways only) Specifies the email address of your iMIS administrator so that the gateway service can contact the administrator if necessary.

Partner

(Payflow Pro gateway only) Specifies the Payflow Pro partner name that was obtained when you created your account.

Host URL

(Payflow Pro gateway only) Specifies the web address of the Payflow Pro gateway.

Host Port

(Payflow Pro gateway only) Specifies the port number of the Payflow Pro gateway.

Vendor

(Payflow Pro and TNSPay gateways only) Specifies your Payflow Pro user name or your TNSPay merchant administration login (username) that was obtained when you created your account.

UserName

(Payflow Pro and TNSPay gateways only) Specifies your Payflow Pro user name or your TNSPay merchant ID that was obtained when you created your account.

Password, Verify Password

(Payflow Pro and TNSPay gateways only) Specifies your Payflow Pro password or your TNSPay merchant administration login password.

Timeout

(Payflow Pro gateway only) Specifies the gateway connection timeout value, in seconds. ASI recommends a timeout value of 30 seconds.

Proxy Server Address

(optional, Payflow Pro gateway only) Specifies the IP address of your organization's proxy server.

Proxy Server UserId

(optional, Payflow Pro gateway only) Specifies the user ID of your organization's proxy server.

Proxy Server Port

(optional, Payflow Pro gateway only) Specifies the port number of your organization's proxy server.

Proxy Server Password

(optional, Payflow Pro gateway only) Specifies the password required by your organization's proxy server.

Verify Proxy Server Password

(optional, Payflow Pro gateway only) Specifies the password required by your organization's proxy server.

Setting up credit/debit card cash accounts in the Accounting module

You must set up credit/debit card cash accounts on the Set up cash accounts window in the Accounting module in the Admin Console before you can use card authorization. When you select a cash account of type Credit Card or Debit Card, the CC Auth Account field displays, enabling you to associate a card authorization account with a credit/debit card cash account. The system automatically generates a read-only description under the CC Auth Account field. The CC Auth Account field requires a value when you select a cash account of type Credit Card or Debit Card.

To define a new credit/debit card cash account code

Note: Before defining new credit/debit card cash accounts, set up your card authorization accounts on the AR/Cash Credit Card Authorization window. In Admin Console, go to Accounting > Options > Configure accounting options, and click Credit Card Auth.

1. In Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts.
2. Click New.
3. In the Code field, enter the abbreviation you want to assign to the cash account you are creating.

   Note: You can use any code you prefer for a credit/debit card. However, for a credit card number to be validated by iMIS, the value, in addition to being a cash account of type Credit Card, must contain one of the credit card types iMIS supports: AMEX, VISA, MC, DISC, DINERS, CB.
4. In the Title field, enter the full name you want to assign to the account.
5. For Type, enable either the Credit Card or Debit Card option.
6. (optional) In the Account field, enter the GL chart of accounts number for the cash account assigned to this table entry, or click the lookup icon to select a value.
7. (optional) For multiple entities, enter the Entity code, or click the lookup icon to select a value.

8. Enter the CC Auth Account, or click the lookup icon to select a value.
9. (optional) Select the appropriate CSC Required option:

- CSC Required Web Entry – In all web-based views of iMIS, marks the Card Security Code field as required for the specified credit card.
- CSC Required Workstation Entry – In iMIS Desktop, marks the CSC field as required for the specified credit card.

  Note: When making the CSC value required, ensure the card authorization account to which the credit/debit card cash account is associated is set to Immediate Authorization or Deferred Authorization.

10. (optional) Select the appropriate Display Issue options:

- Number – Select this option to display a field for the entry of a European debit card's issue number.
- Date – Select this option to display a field for the entry of a European debit card's issue date.

11. Click Save.

    To modify a credit/debit card cash account

    Card authorization accounts are limited in how they can be modified. You might need to create new ones.

1. In Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts.
2. Select a code to edit from the Current Cash Accounts list.
3. Modify the credit/debit card cash account:

- Click Edit to make any necessary changes to the cash account.
- Click Delete to delete the cash account.

  Note: When editing card authorization accounts, you cannot modify the values for the Gateway or Account Code field.

Note: You cannot delete a card authorization account that has been assigned a cash account.

4. Click Save.

Requiring a Card Security Code (CSC) for credit/debit card transactions

As an additional verification for iMIS Desktop credit card transactions, you can make the Card Security Code (CSC) a required value for specific credit/debit card cash accounts. A CSC is the 3- or 4-digit unembossed number that displays on the front or back of a credit/debit card. The CSC is not part of the actual card number and is useful in situations where the card holder is not present when the payment is being made.

Do the following to make the CSC required:

1. In Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts.
2. Select one of the following options for the specified credit/debit card cash accounts:

- CSC Required Web Entry
- CSC Required Workstation Entry
- Both CSC Required Web Entry and CSC Required Workstation Entry

Selecting CSC Required Web Entry makes the CSC required for the specified cash account in the web views. Selecting CSC Required Workstation Entry makes the CSC required for the specified cash account in iMIS Desktop. When either CSC Required Web Entry or CSC Required Workstation Entry is selected, a CSC value is required before you can complete the credit/debit card transaction using the specified cash accounts.

A CSC is not required when processing a reversal payment transaction (for example, entering a credit transaction) or when editing a payment transaction.

Note

- For transactions associated with card authorization accounts that use Immediate Authorization, the CSC value is not stored in the database. The value that displays in the Card Security Code or CSC field is deleted once the transaction is submitted for processing.

- For transactions associated with card authorization accounts that use Deferred Authorization and for which the Save CSC Prior to Authorization option has been selected, the CSC value is temporarily stored in an encrypted format in the iMIS database. For Payflow Pro and TNSPay gateways, iMIS then deletes the stored CSC information after successful authorization. If a saved payment is viewed prior to successful authorization, the CSC number appears as three asterisks regardless of the security level of the iMIS user.
- For Other gateways, which are used only for European debit cards, the CSC information stored in the iMIS database is not automatically deleted by iMIS after successful deferred authorization. You should ensure that the custom gateway interface implemented by your Solution Provider deletes the stored CSC information after being successfully authorized.

  iMIS Desktop only validates that a CSC value is present (if required) and that the value is a 3- or 4-digit alphanumeric character. CSC validation depends on various factors that go beyond the scope of iMIS (for example, whether the credit card processor supports CSC). For specific information regarding CSC validation, contact your authorization gateway, merchant bank, credit/debit card processor, or any other third-party involved in validating your credit card transactions.

  Location of CSC fields

  CSC values can be entered in many locations throughout iMIS. For iMIS payment windows, the CSC field appears only when you enter a credit/debit card cash account that is associated with a card authorization account that uses Immediate Authorization, or that uses Deferred Authorization with the Save CSC Prior to Authorization option selected.

- AR/Cash
- Enter and edit cash receipts window. In Admin Console, go to Accounting > Transactions > Enter and edit cash receipts.
- Enter and edit sales transactions window. In Admin Console, go to Accounting > Transactions > Enter and edit sales transactions.
- Billings

- Enter and edit payments window. In Admin Console, go to Home > Membership and Dues > Enter and edit payments.
- Certification (European debit cards only)
- Order Payment window (from Certification, register a student and create an order)
- Events (European debit cards only)
- Payments tab on the Register for an event window. In Admin Console, go to Home > Events > Register for an event. Select the Payments tab.
- Payments window. In Admin Console, go to Home > Events > Register for an event. Select the Payments tab, and then click More Payments.
- Fundraising
- Overview tab on the Enter and edit gifts window. In Admin Console, go to Home > Fundraising > Enter and edit gifts. Select the Overview tab.
- Process gift payments window. In Admin Console, go to Home > Fundraising > Process gift payments.
- Orders (European debit cards only)
- Payments tab on the Enter and edit orders window. In Admin Console, go to Home > Customer Service > Enter and edit orders. Select the Payments tab.
- Customer Service
- Enter and edit payments window. In Admin Console, go to Home > Customer Service > Enter and edit payments.
- Payment Entry window. In Admin Console, go to Home > Customer Service > Process customer requests. Select the Payment tab.

Accepting and validating Diners Club and Carte Blanche credit cards

iMIS accepts and validates Diners Club and Carte Blanche credit cards. To use Diners Club and Carte Blanche credit cards to process payment transactions, you must set up

the following two new credit card type values on the Set up cash accounts window (in Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts:

- DINERS (Diners Club)
- CB (Carte Blanche)

The following credit card number is available for testing Diners Club and Carte Blanche credit card transactions:

3056 9309 0259 04

Note: For testing purposes, transactions must be under $100.00.

You can process transactions using credit card types with variations of the supported credit card types (for example, DINERS1, DINERS2).

You can enter any credit card value in the Check/CC field on the Enter and edit sales transactions window (from Admin Console, go to Accounting > Transactions > Enter and edit sales transactions) and the Enter and edit cash receipts window (from Admin Console, go to Accounting > Transactions > Enter and edit cash receipts). However, for a credit card number to be validated by iMIS, the value entered in the Check/CC field, in addition to being a cash account of type Credit Card, must contain one of the supported credit card types: AMEX, VISA, MC, DISC, DINERS, CB (for example, MY-AMEX).

Setting up multiple card authorization accounts

Organizations that use iMIS to process accounting transactions may have multiple credit/debit card cash accounts and may want to control how funds are allocated to financial institutions.

For example, an organization that has domestic and international accounts might not want the international accounts processed, but may want to store the information in iMIS. The organization could create a new card authorization account for the international accounts, set the account to Manual Authorization, and create a corresponding cash account and set its CC Auth Account value to the new card authorization account.

Setting up authorization options in Fundraising

When setting up the Fundraising module for card authorization, we recommend disabling the Do Not Validate Credit Card field option.

1. In the Admin Console, go to Configure > Fundraising > Configure fundraising options.
2. Disable the Do Not Validate Credit Card field option.

   If you enable this option, the credit/debit card number will not automatically format when it is entered on the Fundraising Enter and edit gifts window. If Deferred Authorization is enabled on the AR/Cash Credit Card Authorization window, then transactions made on the Overview tab on the Enter and edit gifts window with unformatted credit/debit card numbers will not display in credit/debit card searches and will not print on the Deferred Credit Card Pre-Authorization report.

Setting up European debit card authorization

You can set up a card authorization account that can be used either for manual authorization or deferred authorization of European debit cards through a custom gateway interface.

To set up European debit card authorization

1. In Admin Console, go to Accounting > Options > Configure accounting options.
2. Click Credit Card Auth. The AR/Cash Credit Card Authorization window is displayed.
3. Click New.
4. From the Gateway drop-down list, select Other.
5. In the Account Code field, specify a short label for this card authorization account.
6. (optional) In the Account description field, specify a description for this card authorization account.
7. Select either Manual Authorization or Deferred Authorization for this card authorization account.

8. If you have selected Deferred Authorization and your authorization service requires CSC information for European debit card transactions, select the Save CSC Prior to Authorization checkbox.

   Note: You should ensure that the custom gateway interface implemented by your AiSP deletes the stored CSC information after being successfully authorized.

9. Click Save.

Setting up an authorization account for non-iMIS supported gateway

You must assign a card authorization account to each credit/debit card cash account you create in iMIS.

To set up an account for non-iMIS supported gateways

1. In Admin Console, go to Accounting > Options > Configure accounting options.
2. Click Credit Card Auth. The AR/Cash Credit Card Authorization window is displayed.

   Note: For AR/Cash Credit Card Authorization window to display, you need a relevant license, such as CCAuth or Service Central.

3. Click New.
4. From the Gateway drop-down list, select Other.
5. Select Manual Authorization.
6. Enter NOPROCESS as the Account Code.

   Caution! NOPROCESS has been associated in the web.config file as a no processing payment gateway. If you enter a different code, you will have to modify your web.config files for that code to be recognized.

   This value displays in the Select a Value window that opens when you use the lookup icon on the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.

7. Enter a meaningful description for the authorization account in the Account description field.

   This information displays as read-only data under the CC Auth Account field on the Set up cash accounts window.

8. Click Save.

Database schema for authorization and cash accounts

Card authorization account information and cash account information is kept in the following iMIS tables:

Payflow Pro credit card authorization accounts

The following columns in the CCAuthAcct table are used for each Payflow Pro (PayPay, previously Verisign) card authorization account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CCAuthAcctDescription	varchar (255)	Description associated with an account code
CCAuthMode	tinyint	Authorization mode: 0 (manual), 1 (immediate), or 3 (deferred)
CCAuthAdminEmail	varchar (255)	E-mail address of the system administrator responsible for setting up the accounts
CCAuthUrl	varchar (255)	URL of the test or live site
CCAuthGateway	varchar (255)	Gateway interface through which card authorization occurs
CCAuthPort	int	Port address used for transaction processing
CCAuthUser	varchar (255)	Username created during setup process

CCAuthPassword	varchar (255)	Password created during sign-up process
CCAuthVerisignPartner	varchar (255)	Partner name supplied
CCAuthVerisignVendor	varchar (255)	Vendor name supplied
CCAuthTimeout	int	Timeout period supplied
CCAuthVerisignProxyServer	varchar (255)	Proxy server supplied by network administrator
CCAuthVerisignProxyPort	varchar (255)	Proxy port supplied by network administrator
CCAuthVerisignProxyUser	varchar (255)	Proxy user ID supplied by network administrator
CCAuthVerisignProxyPassword	varchar (255)	Proxy password supplied by network administrator
CCAuthSaveCscBeforeAuth	tinyint	Handling of CSC value for deferred authorization: 0 (do not save CSC in iMIS) or 1 (save encrypted CSC in iMIS then delete after successful authorization)

TNSPay credit card authorization accounts

The following columns in the CCAuthAcct table are used for each TNSPay (TNS, previously Dialect and QSI) card authorization account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CCAuthAcctDescription	varchar	Description associated with an account code

	(255)	
CCAuthMode	tinyint	Authorization mode: 0 (manual), 1 (immediate), or 3 (deferred)
CCAuthAdminEmail	varchar (255)	E-mail address of the system administrator responsible for setting up the accounts
CCAuthGateway	varchar (255)	Gateway interface through which card authorization occurs
CCAuthUser	varchar (255)	Merchant ID created during setup process
CCAuthVerisignPartner	varchar (255)	Merchant Administration login (username) obtained from QSI/Dialect during setup process
CCAuthPassword	varchar (255)	Merchant Administration login (username) password obtained from TNS during setup process
CCAuthSaveCscBeforeAuth	tinyint	Handling of CSC value for deferred authorization: 0 (do not save CSC in iMIS) or 1 (save encrypted CSC in iMIS then delete after successful authorization)

Other gateway credit card authorization accounts

The following columns in the CCAuthAcct table are used for each Other card authorization account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CCAuthAcctDescription	varchar (255)	Description associated with an account code
CCAuthMode	tinyint	Authorization mode: 0 (manual), 1 (immediate), or

		3 (deferred)
CCAuthGateway	varchar (255)	Gateway interface through which card authorization occurs
CCAuthSaveCscBeforeAuth	tinyint	Handling of CSC value for deferred authorization: 0 (do not save CSC in iMIS) or 1 (save encrypted CSC in iMIS)

Credit/debit cards cash accounts

The following columns in the Cash_Accounts table are used for each credit/debit card cash account:

CCAuthAcctCode	varchar (20)	The code for the card authorization account
CSC_ REQUIRED_ WEB	bit	Indicates whether the CSC value is required on the web: 0 (not required) or 1 (required)
CSC_ REQUIRED_CS	bit	Indicates whether the CSC value is required in iMIS: 0 (not required) or 1 (required)
ISSUE_NO_ FLAG	tinyint	Indicates whether the Issue Number field should be displayed in iMIS payment entry windows: 0 (not displayed) or 1 (displayed)
ISSUE_DATE_ FLAG	tinyint	Indicates whether the Issue Date field should be displayed in iMIS payment entry windows: 0 (not displayed) or 1 (displayed)

Setting up credit card authorization for the Public view

Use the following steps to accept credit card payments in iMIS Public view:

1. Set up credit card authentication (in Admin Console, go to Accounting > Options > Configure accounting options and click Credit Card Auth). See AR/Cash Credit Card Authorization window.
2. Set up cash accounts for online registration credit cards (in Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts). See Setting up credit/debit card cash accounts in AR/Cash.

   Note: The cash account codes must be prefixed with W_ (such as W_VISA) to accept credit card payments using the Public view.
3. Modify the web.config file to include the Gateway Account Code. See Modifying the web.config file with the credit card gateway.

Modifying the web.config file with the credit card gateway

In order to accept credit card payments in the Public view or any iParts website, you must add the Gateway Account Code to your web.config file. This must be updated in the iMIS_Public folder if you are using the iMIS Public view, or the NET folder if you are using any website containing iParts. If you do not make this change, you will receive the error message:

An error occurred while processing a payment. Payment gateway was not found to match the associated authorized account

Do the following:

1. In Admin Console, go to Accounting > Options > Configure accounting options and
2. Click Credit Card Auth.
3. Take note of your Account Code for the gateway you are using.
4. On your application server, open the web.config file located in your iMIS_Public folder if you are using the iMIS Public view, or the NET folder if you are using any website

containing iParts.

5. Search for AuthorizationAccounts. The code should look similar to the following:

   <add name="PayFlowProPaymentGatewayProvider" type-e="Asi.PaymentGateway.PayflowProPaymentGatewayProvider, Pay-flowProPaymentGatewayProvider" authorizationAccounts="VERISIGN,PaymentTech,PAYFLOWPRO" />

6. Place a comma after PAYFLOWPRO and add the Account Code for your credit card gate-way and save. For example, if your credit card gateway Account Code was labeled CREDITCARDS, then your code should look similar to the following:

   <add name="PayFlowProPaymentGatewayProvider" type-e="Asi.PaymentGateway.PayflowProPaymentGatewayProvider, Pay-flowProPaymentGatewayProvider" authorizationAccounts="VERISIGN,PaymentTech,PAYFLOWPRO,CREDITCARDS" />

7. Restart IIS. Your credit cards should work in iMIS Public view or any iParts website.

Customizing credit card fields for the Public view

When configuring the Public view for card authorization, go to these locations to adjust your settings:

1. System Setup > Set up commerce web components > Credit card label configuration
2. System Setup > Set up commerce web components > Checkout configuration
3. AR/Cash > Set up tables > Cash accounts - Enable the CSC Required Web Entry option if the CSC code is required for Public view transactions. See Setting up credit/debit card cash accounts in AR/Cash.

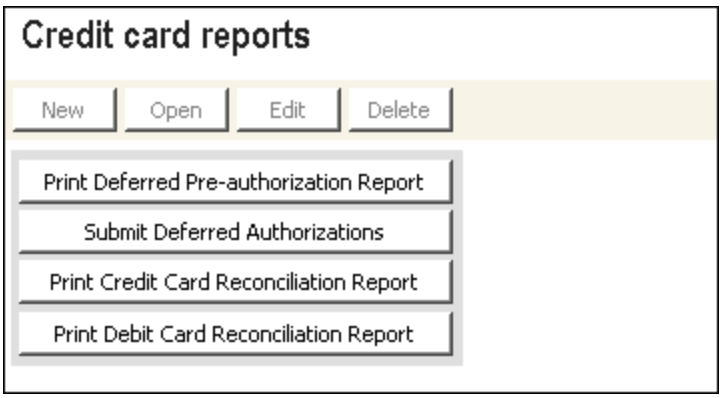
Using card authorization

Once you have set up the AR/Cash options and tested your credit/debit card gateway, you are ready to use card authorization.

- Credit card transactions can be processed in iMIS with either deferred or immediate authorization, as defined by the associated card authorization account.
- European debit cards, however, can be processed only with deferred authorization, and only if your Solution Provider has implemented a custom gateway interface for European debit card authorization.

Credit card authorization window

Note: If you have not set up credit card cash accounts in the Accounting module, the Credit card reports menu item is disabled.



In Admin Console, go to Continuum > Commerce and Customer Service Reports > Credit card reports

To generate credit/debit card reports, in Admin Console, go to Continuum > Commerce and Customer Service Reports > Credit card reports. The following report options display on the Credit card reports window:

- Print Deferred Pre-authorization Report – Prints a report of deferred credit/debit card transactions. The report parameters include Date Range and Org Code.
- Submit Deferred Authorizations – Sends transactions flagged for deferred authorization. All flagged transactions are submitted immediately. This applies only to deferred credit/debit card authorizations.
- Print Credit Card Reconciliation Report – Prints a credit card reconciliation report.

- Print Debit Card Reconciliation Report – Prints a European debit card reconciliation report.

  Note: If you have not set up European debit card cash accounts in the Accounting module, the Print Debit Card Reconciliation Report button is not available.

Immediate card authorization

If you have enabled the Immediate Authorization option, and then entered a credit card payment, the transaction information is sent immediately through the gateway to the financial institution for authorization. After the payment is authorized, the funds are captured at midnight of the transaction date.

Note: European debit card authorization accounts cannot be configured to use the Immediate Authorization option.

To enter a credit card payment using immediate authorization

1. In Admin Console, go to Accounting > Transactions > Enter and edit sales transactions.

   Note: For this example, we are using the Enter and edit sales transactions window. You can enter the credit card payments in any of the windows available for credit card authorization.
2. Click New.
3. Enter the customer ID in the Id field.
4. Enter a product in the Product field, or click the Find icon to select a value.
5. Enter the product quantity in the Quantity field.
6. Enter the credit card code in the Check/CC field. Several additional credit card fields display when you press Tab.
7. Enter the credit card number in the CC # field.
8. If required, enter the Card Security Code in the CSC field.
9. Enter the expiration date in the Exp field.

10. Enter the name on the credit card in the Name on CC field. This does not have to be the same as the customer name.
11. Enter an amount in the Payment Amount field.
12. Click Save:

- If the transaction was authorized, the Authorize field on the payment transaction window populates with the authorization code and the transaction is saved. In addition, if you entered a value in the CSC field, the field is now blank because the system automatically deleted the value once the transaction has been submitted.
- If the authorization was declined, an error message displays indicating that the transaction was declined.Select OK to exit the Results window and return to the transaction window. If the transaction was declined, DECLINED displays in the Authorize field in the payment window.

Note:

- There could be several reasons for a declined authorization, such as bad card, invalid data, or invalid credit card number.
- At this point, you are not able to save the transaction. You can edit the payment date, amount, name, credit card number, and expiration date, and then resubmit the transaction for authorization.

Deferred authorization of payments

Deferred credit/debit card payments are entered in the same manner as if you were using immediate authorization. When a deferred transaction is saved (by clicking OK), the word DEFER displays in the Authorize field. If you select the Deferred Authorization option, credit/debit card transactions are deferred until you submit them.

Caution! Do not accidentally enter any data in the Authorize field. When entering payment information, the Authorize field is empty. It remains empty until you save the transaction, then it populates with the word DEFER to indicate that it is batched for authorization. However, you might need to authorize a payment through a credit card

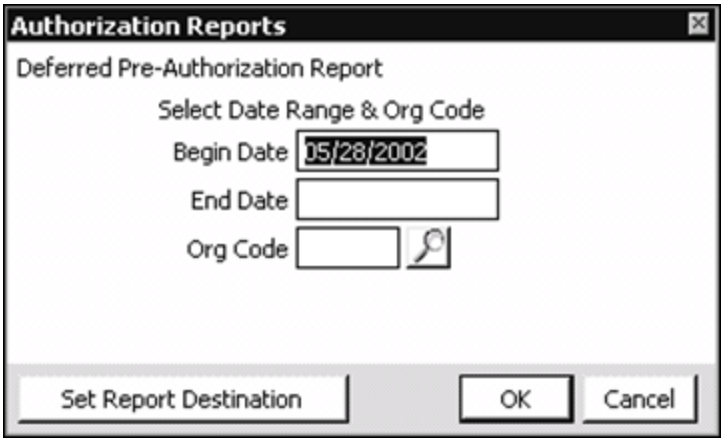
machine or by calling the merchant bank, so iMIS allows you to manually enter authorization codes for these circumstances. However, keep in mind that if you do enter information in this field, iMIS assumes that it is a manually entered authorization code.

Running a Deferred Pre-Authorization report

If you are using Deferred Authorization, you can view a Pre-Authorization report of credit/debit card transactions before you transmit them to be authorized. This allows you to check and edit transactions before submitting them.

To run the Deferred Pre-Authorization report

1. In Admin console, go to Continuum > Commerce and Customer Service Reports > Credit card reports, and click Print Deferred Pre-authorization Report. The Authorization Reports: Deferred Pre-Authorization Report window opens.
2. Enter the Begin Date and the End Date for the date range you are evaluating. The Begin Date defaults to the current system date.
3. (optional) Enter the Org Code, or click the lookup icon to select a value. If you do not enter an Org Code, the report prints for every Org Code.
4. Click Set Report Destination and select the output for the report.
5. Click OK. A Deferred Credit Card Pre-Authorization report prints based upon the specified date range and Org Code.



Selecting a Date Range & Org Code

Deferred Credit Card Pre-Authorization — Thursday, August 23, 2001
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ORG	Date	Amount	Credit Card #	Expires	Name on Credit Card	Source	Trans#
GEN	8/23/2001	39.00	4111 1111 1111 1111	04/02	Douglas A. Hunt	AR	212
Total		39.00					

Sample Deferred Credit Card Pre-Authorization report

Submitting deferred credit card payments

Before deferred credit/debit card payments can be authorized, they must be submitted.

To submit deferred credit/debit card payments for authorization

1. In Admin console, go to Continuum > Commerce and Customer Service Reports > Credit card reports, and click Submit Deferred Authorizations. The Authorization Reports: Submit Deferred Authorizations window displays.
2. Enter the Begin Date and End Date of the deferred authorizations. The Begin Date defaults to the current system date, which you can override.
3. Enter the Org Code, or click the Find icon to select a value. If you do not enter an Org Code, the report prints for every Org Code.
4. Click OK.

Searching credit/debit card transactions

After you enter credit/debit card transactions, you can search iMIS for transactions:

1. In Admin Console, go to Accounting > Transactions > Search credit card info.
2. Enable the Last Four option to search on the last four numbers of the credit/debit card or the Full option to search on the full card number.

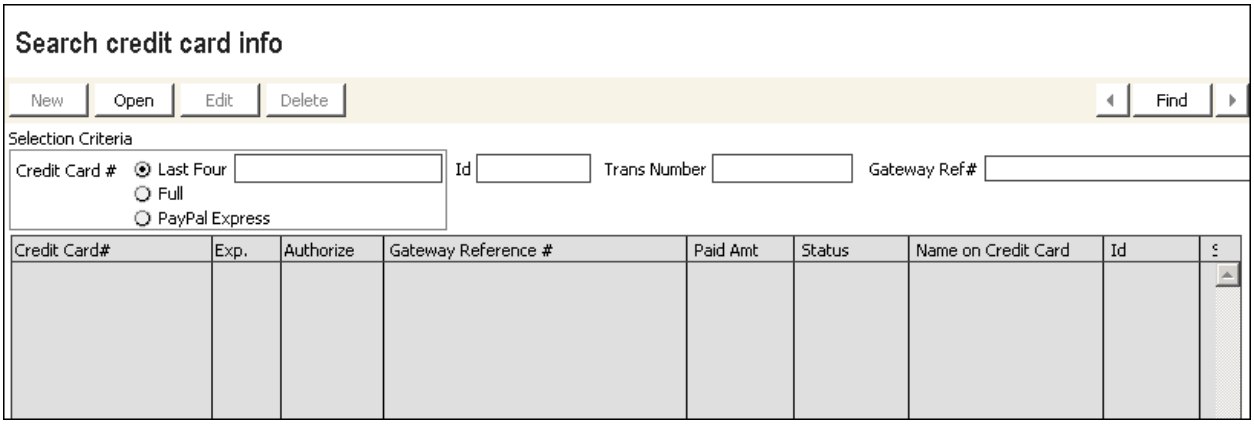
   Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization

code fields. Therefore, the Full option is disabled, because only the last four credit card digits are saved.

3. Enter the card number in the Credit Card # field to search for a specific card number.
4. Enter the customer or company ID in the Id field to search by record. You search by both the card number and ID, or by one field only.
5. Enter the transaction number in the Trans Number field to search by transaction number.
6. Press Enter. A list of transactions for the selected card and/or customer record displays in the window. Unencrypted card information can be viewed in this window only if a user has an AR/Cash authorization level of 8 or higher.
7. To view an individual transaction through the Search credit card info window, double-click the line item. The original transaction window opens.

   Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Search credit card info window



Troubleshooting

- The Status field is populated by Trans.STATUS for transactions entered through Service Central and iBO.

- When entering an order and paying by credit card over the web, the order must be processed to the invoice stage before it will display in the Search credit card info window.
- When viewing credit card transaction status, the details of the transaction are shown, not the details of the actual order payment or the event payment.

Credit Card #

The credit/debit card number associated with the search

Id

The customer or company ID whose credit/debit card transactions are associated with the search

Display fields

- Credit Card # – The card numbers associated with the search.
- Exp. – The expiration date for each card number.
- Authorize – The authorization code for the card transaction.
- Paid Amt – The amount paid with the card transaction.
- Status – This field indicates the authorization status of the transaction. The status options are: A (authorized), D (deferred), and C (captured). If this field is blank, it is either a manual transaction or the transaction was denied.
- Name on Credit Card – The name on the card associated with the transaction.
- Id – The ID associated with the card transaction.
- Source – This field indicates the module source for the card transaction. For example, if the payment were a fundraising gift, FR would display in this field.
- Ref. # – A transaction number or order ID that is generated by the authorization gateway. This information is stored in the Description field of the transaction entry, and must be referenced in order to delete any transactions.
- Ref. Date – Specifies the date the transaction was entered in iMIS

Authorization Gateways

iMIS supports these gateway options for credit card authorization:

1. Payflow Pro (see "Implementing Payflow Pro as an authorization gateway"), offered by PayPal, (previously Verisign), based in the United States
2. TNSPay (formerly SafePay) (see "Implementing TNSPay as an authorization gateway"), offered by TNS, based in Australia and focused on international sales
3. Moneris (see "Implementing Moneris as an authorization gateway"), offered by Moneris Solutions, based in Canada and focused on Canadian sales
4. Custom gateways (see "Creating a custom credit card gateway"), which you can create using ASI-supplied code and documentation

   All three gateway options work with the PCI Compliance options (see "Implementing Advanced PCI Compliance options") available in AR/Cash Setup.

   Note: If Advanced PCI Compliance|topic=Implementing Advanced PCI Compliance options > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

Applying for a merchant bank account

You must apply for a merchant bank account. The merchant bank is where all the credit card transactions are verified. You can find a list of financial institutions using the authorization gateway website. However, before contacting a merchant bank, check with your bank to see if it is compatible with the authorization gateway.

Every organization accepting online credit card transactions must have a merchant account with an acquiring financial institution.

The acquiring financial institution deposits the daily credit card sales into the merchant's account after deducting applicable fees. Some acquiring financial institutions perform merchant services in-house; others outsource these functions to a third-party processor. These services may include billing, customer service, reporting, authorization, and

settlement services for merchants. A third-party processor is a company that provides credit card services to merchants on behalf of acquiring financial institutions.

Implementing Payflow Pro as an authorization gateway

Note: Payflow Pro authorizes credit card transactions up to $9,999.00.

Before you go live with card authorization using Payflow Pro (from PayPal, previously VeriSign), you must take several steps:

1. Ensure you have set up card authorization in iMIS.
2. Register with the Payflow Pro card authorization gateway.
3. Verify your registration setup.
4. Apply for a merchant bank account at a financial institution.
5. Submit and review test transactions.
6. The acquiring financial institution approves the application and notifies the authorization gateway.
7. Switch from test mode to live mode.

This process generally takes 2 to 4 weeks to complete.

To register for a Payflow Pro gateway

You must set up an account with PayPal (previously, VeriSign) for your Payflow Pro card authorization gateway.

1. Go to the PayPal website at www.paypal.com.
2. Select Business from the menu.
3. Under Merchant Services, select Payflow Gateway > Get Started.
4. From the Solution options, select Payflow Pro.
5. From the Country drop-down list, select your country.

6. Click Go.
7. Complete the registration.

   Note: Please make a note of your user login and password. You will need it to configure iMIS and to view reports on the PayPal website. ASI Technical Support does not have access to this information.

   To set up a Payflow Pro card authorization account

1. In Admin Console, go to Accounting > Options > Configure accounting options. Click Credit Card Auth.

   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

2. Click New.
3. Select Payflow Pro from the Gateway drop-down list.

   Note: Once you save a card authorization account, you cannot change the Gateway field.

4. Specify the authorization type: Manual, Immediate, or Deferred.
5. Enter an Account Code, which will appear in the Select a Value window that opens for lookup on the CC Auth Account field on the Set up cash accounts window.

   Note: Once you save a card authorization account, you cannot change the Account Code field.

6. Enter an Account description, which will appear under the CC Auth Account field on the Set up cash accounts window.
7. Enter the Administrator's Email.
8. Enter the Partner value supplied in your account information.
9. In the Host URL field, enter the test or live mode:

- Test mode: pilot-payflowpro.paypal.com
- Live mode: payflowpro.paypal.com

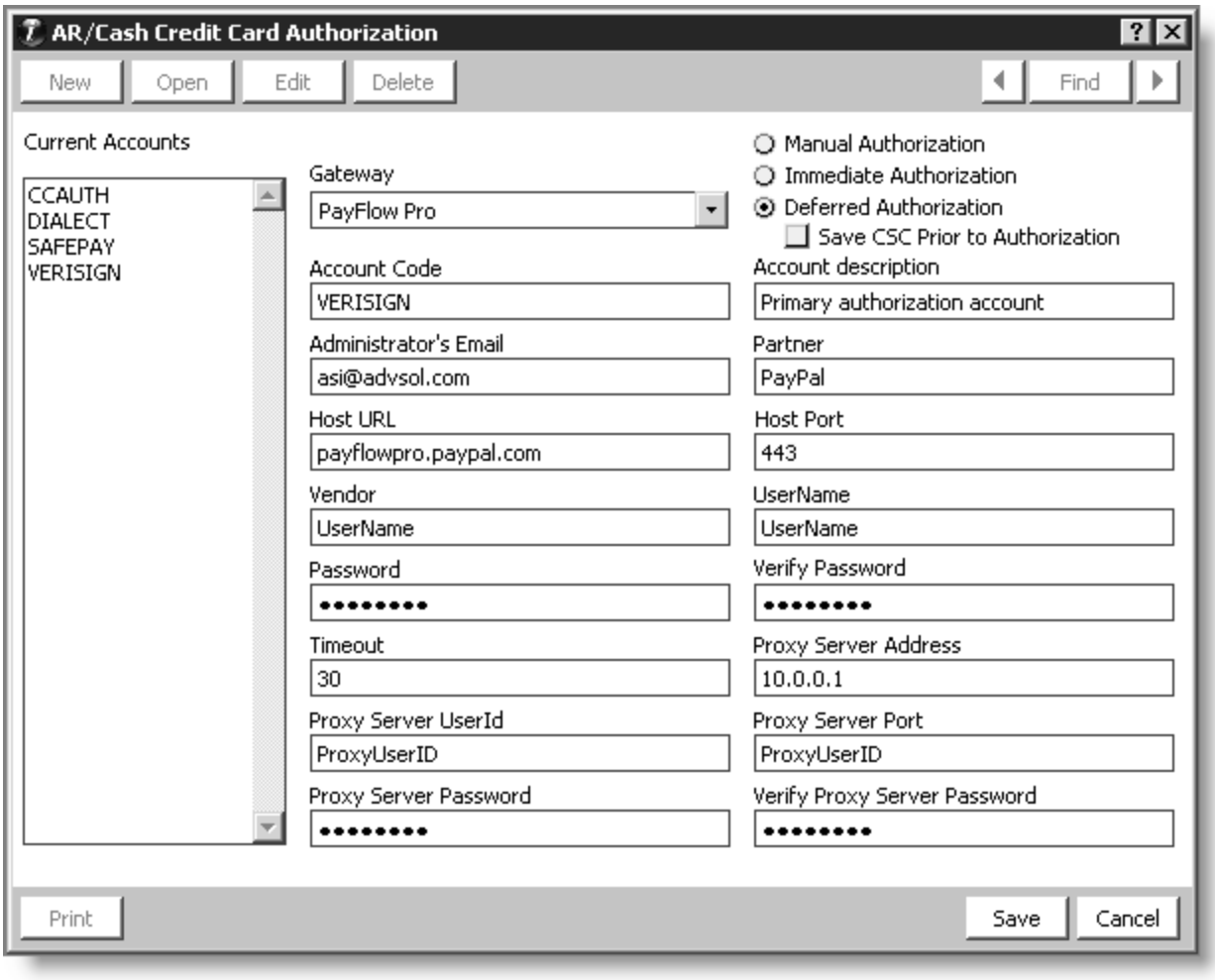
Caution! Do not go live without first setting the Host URL to test mode to verify the registration.

10. Enter 443 in the Host Port field.
11. Enter the values created during the Payflow Pro sign-up process:
    - Enter the UserName in the Vendor field.
    - Enter the UserName in the UserName field.
    - Enter the Password in the Password field and in the Verify Password field.
12. Enter 30 in the Timeout field. This is a recommended value.
13. If you are using a proxy server, enter the values as supplied by your network administrator:
    - Proxy Server Address
    - Proxy Server UserId
    - Proxy Server Port
    - Proxy Server Password
    - Verify Proxy Server Password
14. Click Save.
15. Repeat the steps for each account.
16. Restart iMIS.

Troubleshooting

- If you do not restart iMIS after creating a new account, all transactions will have an authorize code of DEFER even if you enabled the Immediate Authorization option.
- You cannot delete a card authorization account that has been assigned a cash account.
- If you change the CC Auth account for a cash account (from one gateway to another or to a different account on the same gateway) and attempt to edit or delete transactions that

were created earlier in the day before the change of the CC Auth account, there may be undesirable results, particularly if the CC Auth account was changed to a Payflow Pro account.



To associate an authorization account with a credit card cash account code

Before you can use card authorization you must set up credit card cash accounts on the Set up cash accounts window:

1. In Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts.
2. Select a code to edit from the Current Cash Accounts list.
3. Click Edit.

4. Enter a CC Auth Account or click the lookup icon to select a value.
5. Click Save.

Editing and deleting credit card payments

PayPal transaction entries are generated with a captured status. You can edit or delete payment transactions if the changes are made on the same day. If the transaction has already been charged to the credit card, an error will be reported.

iMIS assumes that authorizations are captured every night, so the changes are only allowed if it is done on the same system date as the authorization. However, the system date may not be the same as the batch date or the transaction date.

Note: Deferred payments have not been authorized and can be edited without restriction.

UNKNOWN and DECLINED Payflow Pro transactions

If you encounter an UNKNOWN status, check the Payflow Pro website to verify the transaction exists there. If the transaction does not exist there, delete the transaction from iMIS. If the transaction does exist there, run the following statement:

Update Trans

Set CC_STATUS=' ', CC_AUTHORIZE=' ',DESCRIPTION=' '

Where TRANS_NUMBER = XXXX and

TRANSACTION_TYPE = 'PAY'

To select UNKNOWN or DECLINED transactions, run the following statement:

Select BT_ID,AMOUNT,TRANSACTION_TYPE,CC_STATUS,CC_AUTHORIZE,DESCRIPTION

From Trans

Where TRANSACTION_TYPE = 'PAY' and CC_STATUS <> '' and DESCRIPTION <> ' ' and CC_AUTHORIZE in ('DECLINED','UNKNOWN')

For additional information on Payflow Pro integration, see the Payflow Pro developer's site.

Implementing TNSPay as an authorization gateway

Before you go live with card authorization, you must complete these implementation steps and checks.

Tip: Allow two to four weeks to complete this process.

To implement a TNSPay authorization gateway

1. Ensure you have set up card authorization in iMIS (see "Setting up card authorization").
2. Apply for a merchant bank account at a financial institution. The acquiring financial institution approves the application and notifies the TNSPay authorization gateway.
3. Register with TNSPay (see "Registering with TNSPay") and obtain a test account with a payment server, Merchant ID, certificate files, payment host URL, and login/password for the payment administration web interface.
4. Verify your registration setup.
5. Install Java Virtual Machine and Java Runtime Environment (see "Installing Java Runtime Environment for TNSPay").
6. Set up a TNSPay Payment Client (see "To set up a TNSPay payment client|topic=Installing Java Runtime Environment for TNSPay").
7. (iMIS Desktop only) Submit and review test transactions in iMIS (see "To test immediate TNSPay authorization|topic=Installing Java Runtime Environment for TNSPay").
8. Test PaymentClient (see "Example: Testing immediate authorization") outside of the iMIS environment.
9. Set up a TNSPay card authorization account (see "To set up a TNSPay card authorization account|topic=Example: Testing immediate authorization").
10. Associate a credit card cash account code (see "To associate a card authorization account with a credit card cash account code|topic=Example: Testing immediate

authorization").

11. Switch from test mode to live mode.

    Caution! Transactions processed through TNSPay cannot be edited or deleted.

    Note: For TNSPay-based accounts, the authorization and capture scheme is configured on the payment server, based on the requirements of the merchant bank. This means that transactions may not be captured automatically, depending on the configuration of the account. For accounts that are not set up for automatic capture, in order to perform the captures for transactions submitted for the account, you must log in to the TNSPay administration interface and perform the captures manually.

Registering with TNSPay

You must register with TNSPay (TNS/QSI/Dialect) to obtain the account information you need.

1. Contact TNSPay for the Service Agreement and Registration form.
2. Contact your bank for Internet Merchant ID (Terminal ID) for the TNSPay (Dialect) Internet Credit Card Gateway.
3. Complete the registration form and contact the TNSPay HelpDesk. They will set up the account for you and provide you with a merchant key.
4. Via email, TNSPay will send you your account information:

- Merchant ID
- certificate files
- login/password
- payment host
- payment host URL

Installing Java Runtime Environment for TNSPay

TNSPay (TNS/Dialect) requires the Java Runtime Environment (JRE) to be installed:

- To run the Payment Server, install JRE 1.3.1 or higher on your iMIS application server.
- Before setting up the PaymentClient, install JRE 1.3.1 or higher.

  You can download the current JRE version from java.com.

  To set up a TNSPay payment client

  To accept TNSPay payments through iMIS Web or Public views, you must install the TNSPay client software on the appserver itself, which does the processing for the gateway. Perform the following steps on iMIS Desktop:

1. Obtain the setup files from TNSPay or ASI Technical Support and copy them to a temporary local directory.
2. (Windows 2008) To install the client on Windows 2008, disable Data Execution Prevention (DEP) for everything except System Processes.
3. (Windows 2003) Change the setup file's properties to run as compatible with Windows 2000 (right-click the file, select Properties, and select the Compatibility tab).
4. Run the setup as directed by TNSPay.
5. Restart your machine when the installation successfully completes.
6. Verify the settings in your setup.properties file, as directed by TNSPay.
7. (optional) To test PaymentClient outside of iMIS, in the CardNumbers.profile file, ensure that any expiryDate values match the expiration dates of any test credit card numbers provided to you by TNSPay.

   To test the TNSPay client outside of iMIS

   You can test the TNSPay client, PaymentClient, outside of the iMIS Desktop environment. Be sure to adjust your PaymentClient settings so that the test card numbers will be authorized:

1. Locate the \config directory within the \PaymentClient installation directory.

2. Edit the CardNumbers.profile file.
3. Ensure that any expiryDate values match the expiration dates of any test credit card numbers provided to you by TNSPay.

To test immediate TNSPay authorization

1. Before you test, make sure that you are licensed in iMIS for credit card authorization (CCAUTH) and that the Immediate Authorization option is selected on the AR/Cash Credit Card Authorization window (in Admin Console, go to Accounting > Options > Configure accounting options. Click Credit Card Auth).

   Use the following credit card numbers for testing purposes:

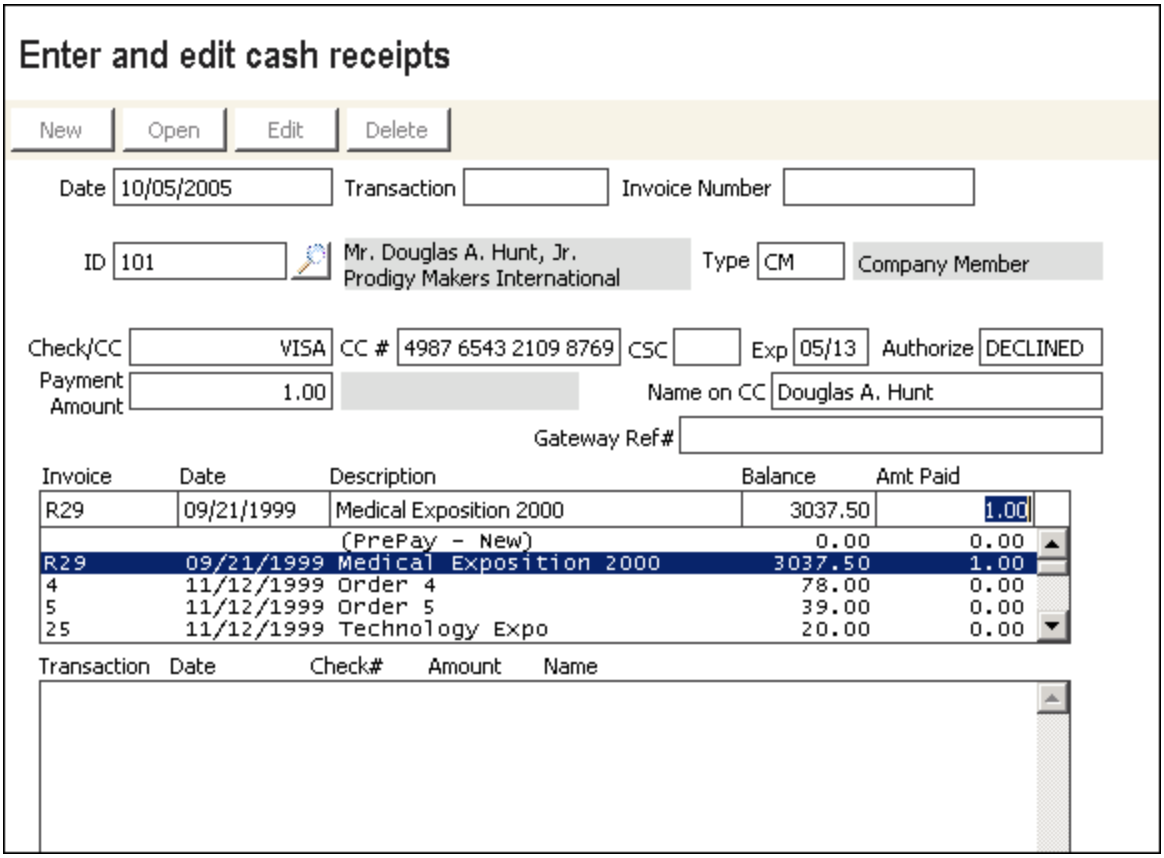
- Master Card: 5123 4567 8901 2346 (05/13)
- VISA: 4987 6543 2109 8769 (05/13)
- American Express: 3456 7890 1234 564 (05/13)
- Diners Club 3012 3456 7890 19 (05/13)

2. In Admin Console, go to Accounting > Transactions > Enter and edit cash receipts.
3. Click New.
4. When entering a payment, enter one of the test credit card codes in the Check/CC field. A CC # and additional data entry fields display.
5. Enter the test credit card number in the CC # field.
6. If required, enter a Card Security Code in the CSC field.
7. Enter an expiration date in the Exp field.
8. Enter the name on the credit card in the Name on CC field. This need not be the same as the customer name.
9. Enter a dollar amount in the Payment Amount field.

10. Click Save. The Authorize field displays a status code of either a deferred status (DEFER), a unique authorization code (if your financial institution returns an authorization code), or DECLINED or UNKNOWN if the credit card is not authorized by TNSPay. In addition, if you entered a value in the CSC field, the field is now blank because iMIS automatically deletes the value once the transaction has been submitted.

    Notes

- If your financial institution does not return unique authorization codes, the Authorize field will contain null.
- The criteria for authorization depend upon the policy of the acquiring financial institution.

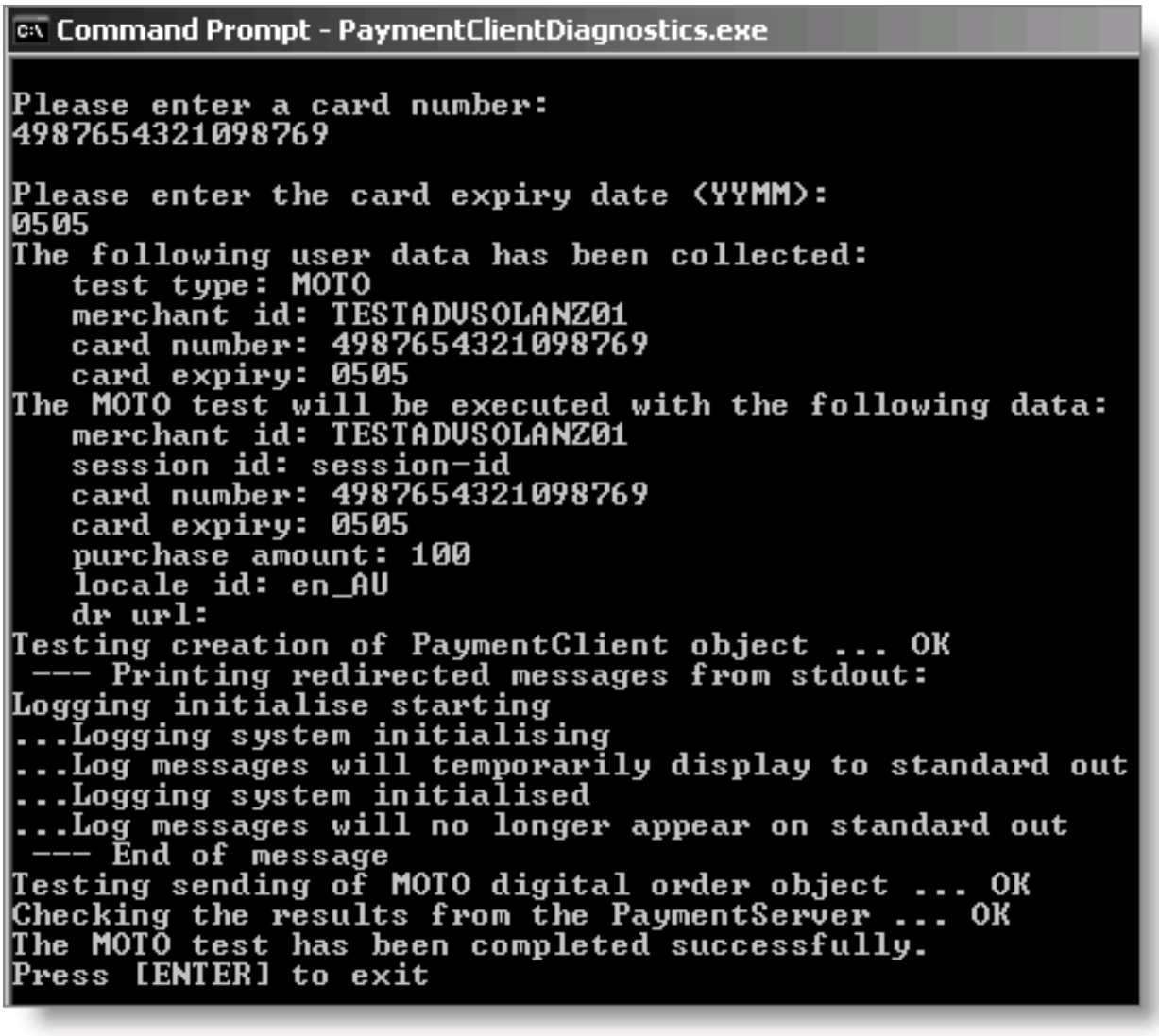


Testing immediate credit card authorization with CCAuth

Example: Testing immediate authorization

This example tests TNSPay connections using the command line test tool provided with the payment client. Check with your gateway provider for the latest testing tools and procedures.

1. Ensure the service is running. Go to Start > Control Panel > Administrative Tools > Services.
2. Look for Dialect PCService in the Service Console, and ensure that it is Started.
3. Test connectivity by selecting Start > Programs > Dialect > PaymentClient > Test Payment Client. The Payment Client Diagnostics program retrieves and displays client configuration information and prompts you to enter transaction information.
4. Select 1 for MOTO.
5. Enter the Merchant ID provided with your account information.
6. Select a credit card number or enter Z to enter another credit card number.
7. Enter the credit card expiration date (format: YYMM). The diagnostic program tests the PaymentClient configuration and displays test results on the screen.



Example of a successful test transaction

To set up a TNSPay card authorization account

1. In Admin Console, go to Accounting > Options > Configure accounting options. Click Credit Card Auth.

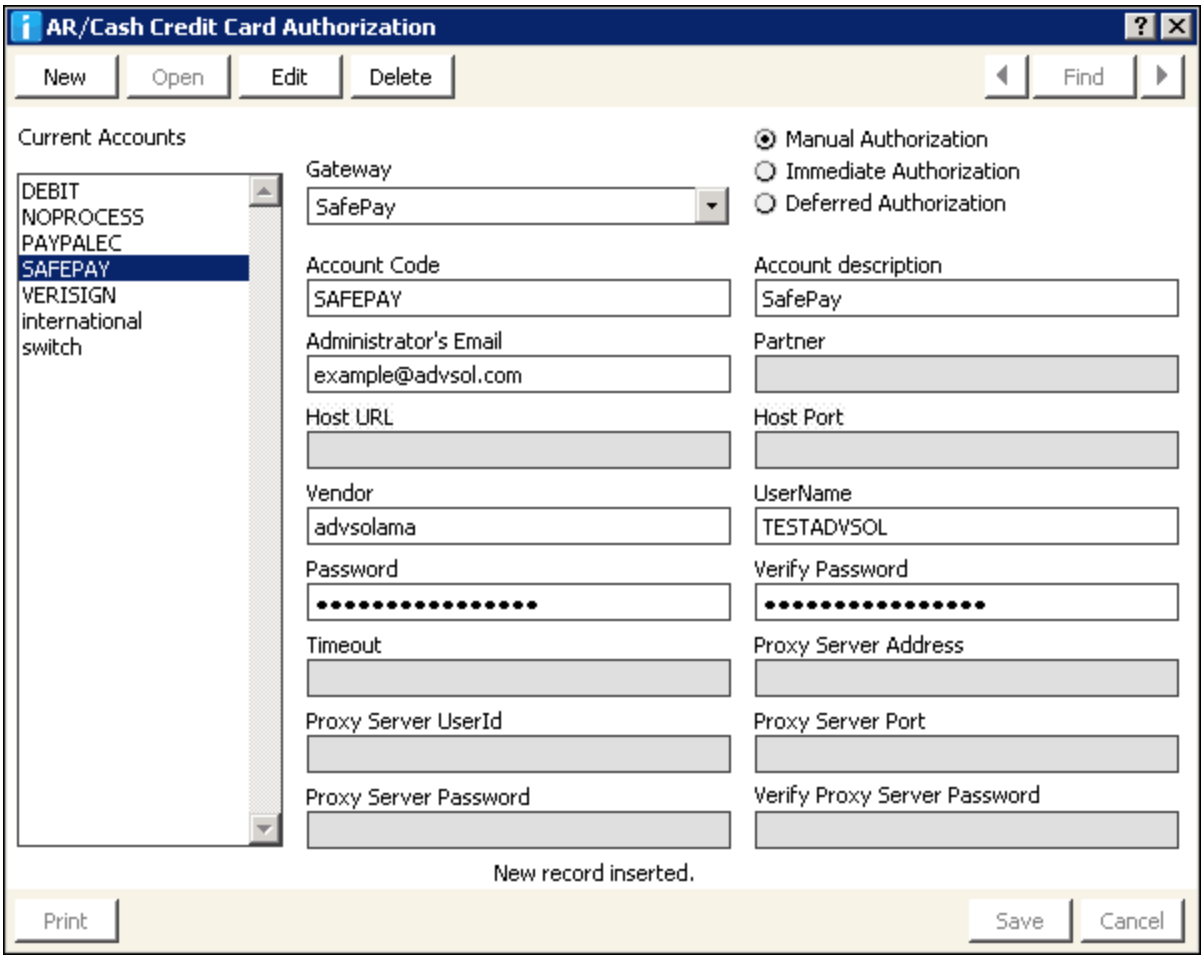
   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

2. Click New and select TNSPay from the Gateway drop-down list.

Note: When editing card authorization accounts, you cannot modify the values for the Gateway or Account Code field.

3. Enable the Manual Authorization, Immediate Authorization, or Deferred Authorization option.
4. Enter an Account Code. This value displays in the Select a Value window that opens when you click the lookup icon on the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.

   Note: When editing card authorization accounts, you cannot modify the values for the Gateway or Account Code field.
5. Enter a description for the account in the Account description field. If you enter a value in this field, it displays as read-only data under the CC Auth Account field on the Set up cash accounts window.
6. Enter the Administrator's Email.
7. (optional) Enter the Merchant Administration login (username) you were given in the Vendor field.
8. Enter the Merchant ID obtained during set up in the UserName field.
9. Enter the Merchant Administration password you were given in the Password and Verify Password fields.
10. Click Save.
11. Restart iMIS.



Configuring QSI Authorization

Note: If you do not restart iMIS after creating a new account, all transactions will have an authorize code of DEFER even if you enabled the Immediate Authorization option.

Note: You cannot delete a card authorization account that has been assigned a cash account.

Note: Transactions processed through QSI cannot be edited or deleted.

Note: If you change the CC Auth account for a cash account (from one gateway to another or to a different account on the same gateway) and attempt to edit or delete transactions that were created earlier in the day before the change of the CC Auth account, there may be undesirable results, particularly if the CC Auth account was changed to a VeriSign account.

To associate a card authorization account with a credit card cash account code

Before you can use card authorization you must set up credit card accounts on the Set up cash accounts window:

1. In Admin Console, go to Accounting > Options > Set up tables > Set up cash accounts.
2. Select a code to edit from the Current Cash Accounts list.
3. Click Edit.
4. Enter a CC Auth Account or click the lookup icon to select a value.
5. Click Save.

Managing TNSPay transactions

With TNSPay, you cannot edit or delete existing transactions or enter refunds (enter payments with negative amounts).

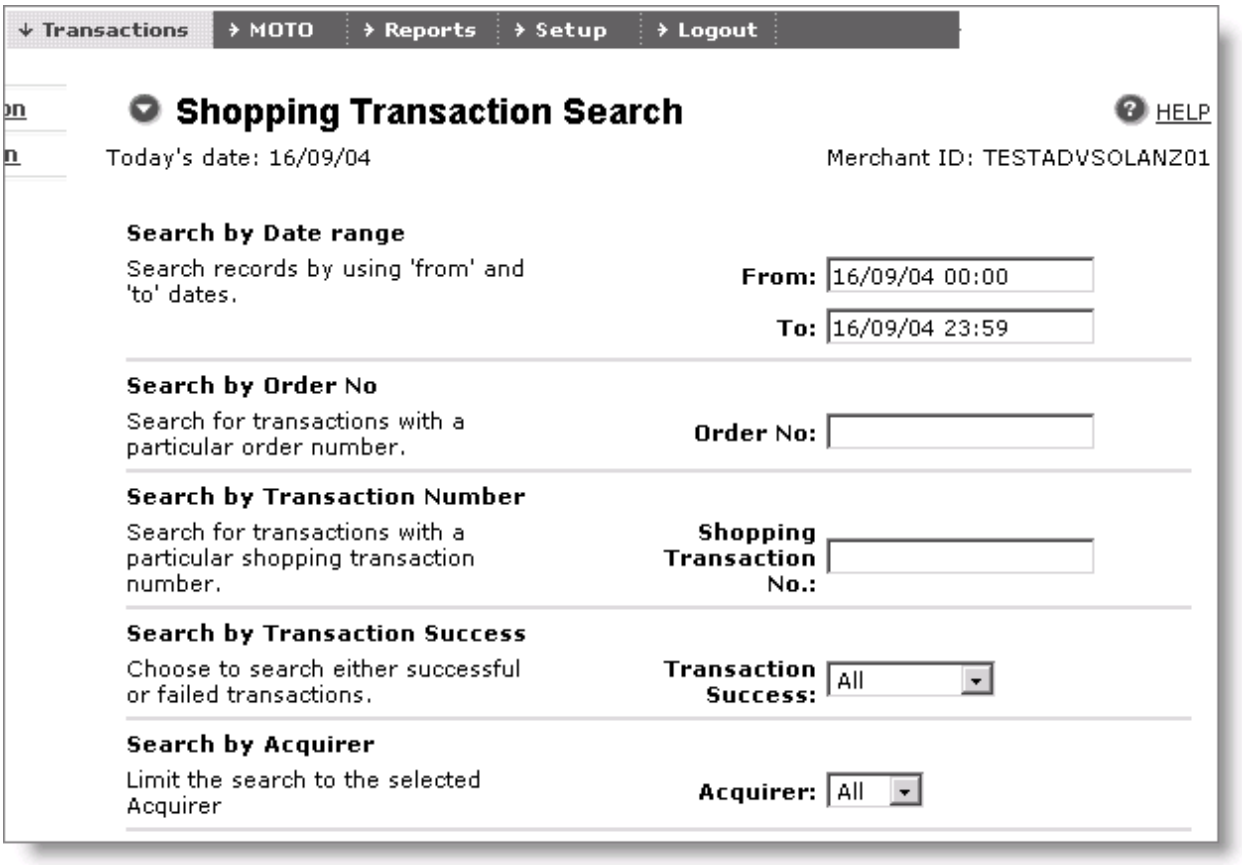
The authorization and capture schema is configured on the payment server, based on the requirements of the merchant bank. This means that transactions might not be captured automatically, as it depends on the configuration of the account.

For accounts that are set up for automatic capture, you must log in to the administration interface and capture the transactions manually in order to perform the captures for transactions submitted for the account.

Note: Regardless of the authorization/capture schema, iMIS creates all Trans entries for TNSPay-based transactions with the Trans.CC_Status column value = 'C' (in the same manner as Payflow Pro).

To view submitted transactions

1. Go to the merchant account site.
2. Enter your merchant ID, login, and password.
3. Select the Transactions menu. A window similar to the following is displayed:



Go to https://secure.dialectsolutions.com/DPS/MA

Implementing Moneris as an authorization gateway

Before you begin, you will need a merchant account with Moneris. As a developer, you will also need a copy of the Moneris SDK, documentation, tools, and a test account with test card numbers. Make sure your test account credentials work properly.

Before implementing Moneris, you must install it in a test environment. Moneris must be installed on each iMIS Desktop workstation from which payments are entered.

Setting up a Moneris credit card authorization account

To configure iMIS to work with Moneris, you must setup a credit card authorization account.

Note: Only two fields are required for the Moneris gateway: Account Code and Account Description. The remaining fields are available for connection parameters. Your developer can use the data entered to these fields for other purposes, or not at all.

1. In Admin Console, go to Accounting > Options > Configure accounting options. Click Credit Card Auth.

   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

2. Click New.
3. Select Moneris from the Gateway drop-down list.
4. Enable the Immediate Authorization option.
5. Enter an Account Code. This value displays in the Select a Value window that opens when you click the Find icon in the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.
6. Enter a description for the account in the Account description field. If you enter a value in this field, it displays as read-only data under the CC Auth Account field on the Set up cash accounts window.
7. Click Save.

Troubleshooting the installation for Moneris

If Moneris is not installed or is installed incorrectly (for example, if there is no CCAuthAcct row or Cash_Account row in the database), you will not see it as an available option in the Gateway drop-down list.

Other kinds of misconfigurations, such as using the wrong URL or vendor, will result in the following message:

- If you do not restart iMIS after creating a new account, all transactions will have an authorize code of DEFER even if you enabled the Immediate Authorization option.
- You cannot delete a card authorization account that has been assigned a cash account.
- If you change the CC Auth account for a cash account (from one gateway to another or to a different account on the same gateway) and attempt to edit or delete transactions that were created earlier in the day before the change of the CC Auth account, there may be

undesirable results, particularly if the CC Auth account was changed to a Payflow Pro account.

Creating a custom credit card gateway

If you choose not to use Payflow Pro, Moneris or TNSPay, you can create a custom credit card gateway. The same connection parameters that are available for a Payflow Pro gateway are also available for a custom gateway. This includes all of the authorization modes and settings on the AR/Cash Credit Card Authorization window.

iMIS Web views

A .NET developer can write a custom gateway for the web views of iMIS. Templates and documentation are available from iMIS Community's SDK Center.

iMIS Desktop

An Xtender developer can use Visual Basic to write a custom gateway for iMIS Desktop. Templates and documentation are available from the iMIS Support community under Extension Products. Instructions for customizing the gateway are in the documentation and the control files. The Xtender developer must define and carefully document which of the fields should be populated, if any, and for what purpose.

Installing a custom credit card authorization gateway

Before implementing a custom gateway, the developer must install the new application in a test environment. The application must be installed on each iMIS Desktop workstation from which payments are entered.

After the custom gateway application is installed you must:

1. Create a new Credit Card Authorization account (see "Setting up a custom credit card authorization account") (AR/Cash > Set up module > Credit card authorization).
2. Set up a Cash Account (AR/Cash > Set up table > Tables > Cash Accounts) for a Type, Credit Card or Debit Card, that uses the newly defined Credit Card Authorization account.

Setting up a custom credit card authorization account

To configure iMIS to use an Xtender application that a developer has created for a custom credit card gateway (see "Creating a custom credit card gateway"), you must setup a credit card authorization account.

Note: Only two fields are required for the custom gateway: Account Code and Account Description. The remaining fields are available for connection parameters. Your developer can use the data entered to these fields for other purposes, or not at all.

Caution! The labels on the fields may not correspond to the data you need to enter. Check with your developer to find out whether these fields require special data for the custom gateway.

3. In Admin Console, go to Accounting > Options > Configure accounting options. Click Credit Card Auth.

   Note: For Credit Card Auth to display, you need a relevant license, such as CCAuth or Service Central.

4. Click New.
5. Select Custom from the Gateway drop-down list.
6. Enable the Immediate Authorization, or Deferred Authorization option.
7. Enter an Account Code. This value displays in the Select a Value window that opens when you click the Find icon in the CC Auth Account field on the Set up cash accounts window. This value cannot be changed once the record is saved.
8. Enter a description for the account in the Account description field. If you enter a value in this field, it displays as read-only data under the CC Auth Account field on the Set up cash accounts window.
9. Click Save.

Troubleshooting the installation for custom gateway

If the custom gateway application is not installed or is installed incorrectly on iMIS Desktop, the transaction will fail. When a user attempts to save a payment transaction that is dependent on the custom gateway, the authorization process will time out for that transaction. iMIS informs the user that the payment cannot be authorized because the gateway application is not installed correctly.

- This message is presented first.

  Custom Gateway not properly installed

  The payment type entered for this transaction requires a Custom Gateway for credit card authorizations. The custom gateway is not properly installed on this workstation.

  The authorization for this payment transaction will time out.

  Please contact your system administrator or the developer of your custom gateway application before processing payments using the specified payment type.

  Note: An error message identifier, nCCAuthOnly_Custom, at the bottom of this message informs Technical Support that this is not an iMIS issue.

- After the user clicks OK in the Custom Gateway not properly installed message box, a standard iMIS warning is provided.

  The authorization process timed out. Please contact your system administrator.

PHP Examples

Add a Person

```
<?php

require_once 'iMISClasses.php';

require_once 'iMISEntityService.php';


$baseURL = 'http://www.imiscommunity.net/iMISSOA';

$username = 'username';

$password = 'password';

$verbose = false;


// get an EntityService client

echo "Get an EntityService client.\n";

try { $client = new iMISEntityService($baseURL, $username, $password); }

catch( Exception $e )

  {

  echo "Exception: $e->faultstring\n";

  exit();

  }


// Add a person

echo "Add a Person.\n";

try
```

```
{
    $party = new PersonData();
    $party->PersonName->LastName = "Smith";
    $party->PersonName->NamePrefix = "Mr.";
    $fa = new FullAddressData();
    $fa->AddressPurpose = 'Work Address';
    $fa->Phone = '(555) 555-5555';
    $addr = new AddressData();
    $addr->AddressLines->string[] = '123 Main Street';
    $addr->CityName = "Boston";
    $addr->CountrySubEntityCode = 'MA';
    $fa->Address = $addr;
    $party->Addresses->FullAddress[] = $fa;
    $sal = new PartySalutationData();
    $sal->SalutationType = 'test';
    $sal->Text = 'Mr. John Smith';
    $party->Salutations->PartySalutation[] = $sal;
    $result = $client->Add($party);
    if ($result->IsValid) {
        $party = $result->Entity;
        echo "Added a person: $party\n";
    }
    else {
```

```
      echo "Error adding person: " . $result->getErrorSummary() . "\n";
   }
}
catch (Exception $e)
{
   echo "Exception: " . $e->getMessage() . "\n";
   echo $client->getLastRequest();
}
?>
```

Find Party by PartyId

```
<?php
require_once 'iMISClasses.php';
require_once 'iMISEntityService.php';


$baseURL = 'http://www.imiscommunity.net/iMISSOS';
$username = 'username';
$password = 'password';
$verbose = false;


// get an EntityService client
echo "Get an EntityService client.\n";
try { $client = new iMISEntityService($baseURL, $username, $password); }
catch( Exception $e )
   {
   echo "Exception: $e->faultstring\n";
   exit();
   }
```

```
// Find party by PartyId
echo "Find a Party.\n";
try
   {
   $query=new QueryData('Party');
   $query->addCriteria(new CriteriaData('PartyId', CRITERIA_EQUAL, '101'));
   $findResults=$client->Find($query);
   if (count($findResults->Result) == 0)
      {
      echo "Party not found.\n";
      exit();
      }
   $party=$findResults->Result[0];
   echo "Find Party: $party \n";


   if (is_a($party, "PersonData")) { echo "FirstName: " . $party->PersonName->FirstName
. "\n"; }
   else { echo "Organization: $party->OrganizationName\n"; }


   echo "City: " . $party->Addresses->FullAddressData[0]->Address->CityName . "\n";


   if ($verbose) { print_r ($party); }
   }
catch( Exception $e )
   {
   echo "Exception: $e->faultstring\n";
   echo $client->getLastRequest();
```

```
   }
?>
```

Find Party (summaries) by Last Name, with pagination

```
<?php
require_once 'iMISClasses.php';
require_once 'iMISEntityService.php';

$baseURL = 'http://www.imiscommunity.net/iMISSOA';
$username = 'username';
$password = 'password';
$verbose = false;

// get an EntityService client
echo "Get an EntityService client.\n";
try { $client = new iMISEntityService($baseURL, $username, $password); }
catch( Exception $e )
   {
   echo "Exception: $e->faultstring\n";
   exit();
   }

// Find Parties by last name
echo "Find Parties by last name.\n";
try
   {
```

```
   $query=new QueryData('PartySummary');
   $query->addCriteria(new CriteriaData('LastName', CRITERIA_STARTSWITH, 'Hunt'));
   // $query->addCriteria(new CriteriaData('UpdateInformation.UpdatedOn', CRITERIA_
GREATERTHAN, '2008-6-1'));
   $pager=new PagerData();
   $pager->PageSize=5;
   $query->Pager=$pager;
   $query->SortFields=Array
      (
      new SortFieldData("FirstName", "Descending"),
      new SortFieldData("LastName")
      );
   echo "Parties: \n";
   do
      {
      $findResults=$client->Find($query);
      echo $findResults->Query->Pager . "\n";
      foreach ($findResults->Result as $party) { echo "$party\n"; }
      $query=$findResults->Query;
      $query->Pager->PageNumber=$query->Pager->PageNumber + 1;
      } while ($query->Pager->PageNumber < $query->Pager->PageCount);
   echo "\n";
   }
catch( Exception $e )
   {
   echo "Exception: $e->faultstring\n";
   echo $client->getLastRequest();
   }
?>
```

Process Manager

For your convenience, Process Manager can be accessed from the iMIS Staff Site (select RiSE> Process Manager). Refer to the Process Manager documentation for details.

Professional Referrals

Referrals Overview

Professional Referral gives you several important tools that enable you to generate and manage professional referral requests.

- You can narrow your selection criteria of professionals with preferences like location or gender.
- You can view only relevant provider candidates based on the criteria you enter, and who is currently subscribed to the service. The candidates with the fewest referrals display at the top of the list.
- You can select candidates returned by your search and dynamically view their complete record of information including name, address, office location, specialties, and insurance.
- When you select candidates for referral, you can then enter contact information about the client requesting the service. This information is available for generating reports for your providers which detail the referral requests received and fulfilled.

Professional Referral Features

The iMIS Professional Referral module is integrated into the iMIS system such that it capitalizes on data and systems existing elsewhere in your database.

- Professional Referrals works with the Customer Management and Billing modules to coordinate subscriptions with the referral service and to determine current eligibility for participation.
- Specifying your search criteria lets you customize the referral for your client's needs. You can specify up to four additional customer fields to serve as search criteria.
- A zip/area option lets iMIS preferentially locate a zone or area based on the client's zip code. iMIS can search for a specific zip code, a zip code area (all zip codes beginning with a set of three digits), or no zip code restriction.

- By editing the text in your formal letters, you can customize your policy statements and insert merge fields for seamless, personalized output.

  Navigation for Referrals

  The Referrals task list displays when you select Referrals from the navigation bar.

- Manage referrals - Select this task list item to open the Manage referrals window that allows you to enter and manage professional referral requests.
- Generate reports - Select this task list item to open the Generate reports window that allows you to print detailed rosters, overall status summaries, and letters.
- Set up module - Select this task list item to open the Set up module window that allows you to define your Referrals system preferences.
- Create referral orders - Select this task list item to create referral orders.
- Delete expired - Select this task list item to open the Deleted expired window that allows you to delete expired referrals, customers, and providers.
- Rebuild search indexes - Select this task list item to rebuild your list of referrals.

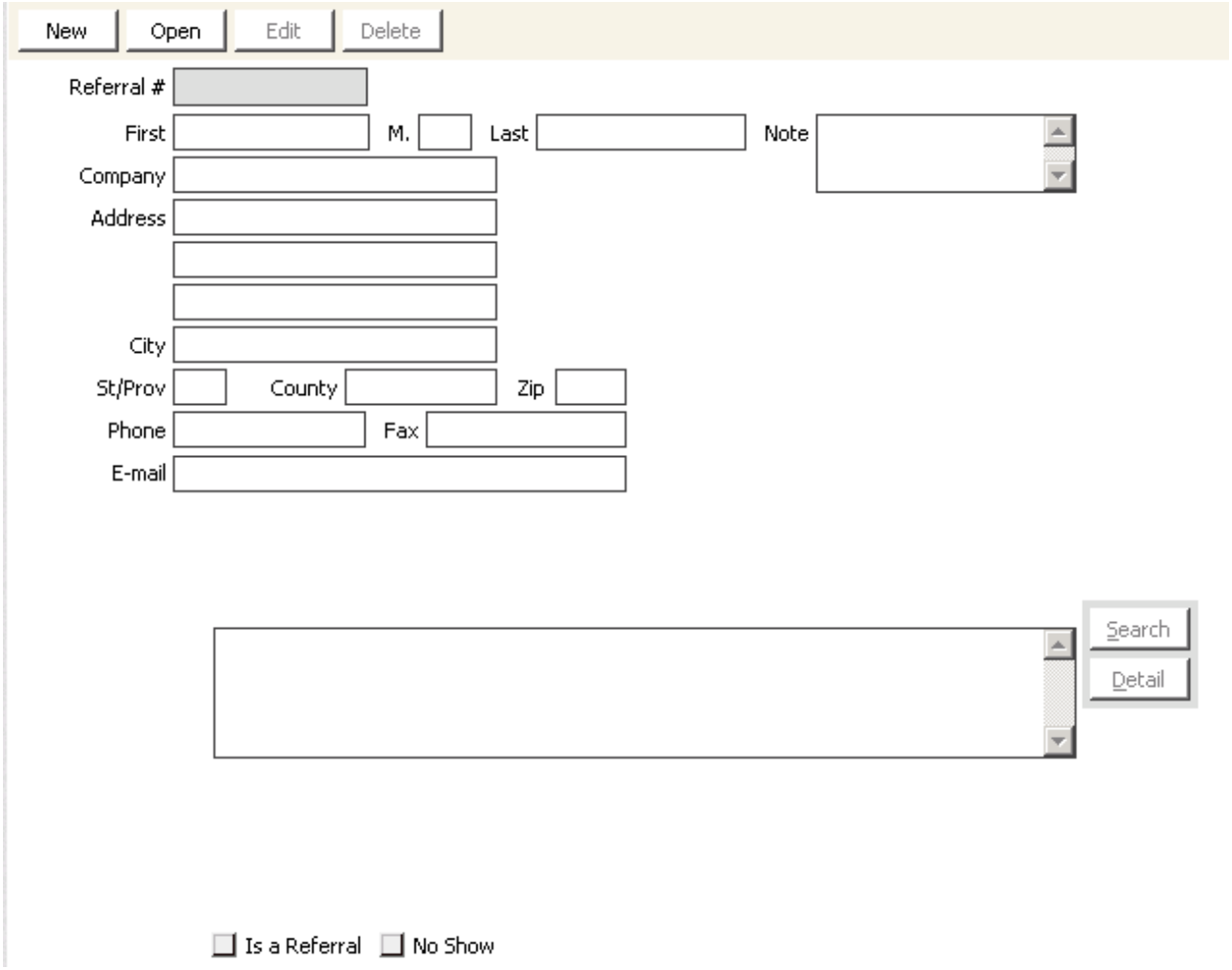
Referral Management

Referral information is entered on the Manage referrals window. Data relating to the request for a referral is entered in the top half of the window. The bottom half of the window displays the results of the search, and the marking of the candidates that were actually referred.

Entering Referrals

Entering a referral involves entering the referral client's information, and selecting a provider. Use the Manage referrals window to enter referrals.

Manage referrals window



Admin Console: Home > Referrals > Manage referrals
Desktop: Referrals > Manage referrals

Referral #

(read only) Displays the referral number. When you enter a new referral, this field is blank until you click Save. After you click Save, iMIS automatically generates a sequential number for the referral.

You can search for referrals by entering the Referral # in the Ref ID on the Find Referrals window.

First

Specifies the first name of the client requesting the referral, or use standard lookup (Ctrl+L) to retrieve an existing client.

Note: When you search for clients, you are not able to lookup individuals in the Name table, only Ref_Client. You will need to manually enter existing customers as clients.

Note: If you enter information for an existing client you will create a duplicate record.

Note: If you do not enter a name for the client, iMIS prompts you to confirm you entered the referral correctly.

M

Specifies the middle name of the client making the referral request, or use standard lookup (Ctrl+L) to retrieve an existing client.

Last

Specifies the last name of the client making the referral request, or use standard lookup (Ctrl+L) to retrieve an existing client.

Note: If you do not enter a Last name for the client, iMIS prompts you verify that you want to create a transaction without the Last name.

Company

Specifies the company name of the client making the referral request.

Address

Specifies the street address of the client making the referral request.

City

Specifies the city of the client making the referral request

St/Prov

Specifies the state or providence of the client making the referral request.

zip

Specifies the Zip code of the client making the referral request.

Phone

Specifies the telephone number of the client making the referral request.

Fax

Specifies the fax number of the client making the referral request.

E-mail

Specifies the e-mail address of the client making the referral request.

Note

Specifies any information related to the referral transaction.

Optional Fields

Specifies the codes for the client's responses, such as the source of the marketing program or contact type that generated their order. Standard lookup (Ctrl+L) is available.

Note: These optional fields are validated from the lookup tables you create on the Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation) and referenced on the Referrals Set up module window. Do not to enter data into the Expansion field for these validation tables.

Zip/Area

Optional search field. If you enable the Use Zip Areas option on the Set up module window, iMIS autofills this field with the client's zip code to restrict search to local providers. You can override the code or enter a 3-digit zip such as "787," which locates 78727, 78759, and 78702. You can also enter any zip code areas you defined in the REFERRAL_AREA table.

Note: At any time, you can override or clear the default value.

User-Defined Search Fields (Up to 5)

According to the Optional Search Fields you specify on the Set up module window, labeled text boxes display for the entry of match/search values to find candidates that meet the specified criteria. Depending upon the nature of the search field, it may be

appropriate to enter multiple search values, separated by commas. For example, a client looking for a CPA may specify a company/individual with expertise in both individual tax preparation and personal financial planning. In this case, it would find records with both areas indicated.

Provider List

A scrolling list of providers. The providers that display in the list depend on your search criteria.

As you choose referrals from the candidates listed, double-click on the lines in the scrolling list to mark them. When you double-click, an indicator (>) marks the line (left of the ID). This marking works as a toggle: double-click an unmarked line to mark it for referral; double-click a marked line to unmark (deselect) it.

Typically, you will mark the first three candidates in the returned list for a referral. However, you control which lines are marked, so you can select any number of records from any location in the list.

Search button

Used to search for providers according to your criteria.

Detail button

Opens the Provider Detail window where you can view details about a provider including contact information, overall status, and current referral status.

Is a Referral

Select this option to indicate that you are making a referral. The referral count for the selected provider will automatically be decreased, but any orders or invoices must be manually adjusted.

If you select a provider and do not select the Is a Referral option, iMIS displays a message informing you that to count your selection as a true referral, you must select the Is Referral option. If you do not select the option, iMIS saves the record as a non-referral.

Note: Whether or not you select Is A Referral will determine whether or not the referral count of the provider is affected.

No Show

Select this option to indicate that a client did not show up as scheduled. iMIS automatically does the following when you mark a referral as a no show:

- Decreases the provider's count
- Sets the LAST_REFERRED date in the Ref_Provider table to the date of the last referral if that date is earlier than the creation date of the referral at hand. If the date of the last referral is later than the referral at hand, it remains the LAST_REFERRED date.

  In either case, the referral record is maintained in the Referrals table. No shows are labeled as such in relevant reports such as the Daily Summary of Referrals.

Ready to Invoice

Select this option to indicate that reference fees can be processed for the specified referral.

Ref Fee

When you set up a sales product for referrals, you can specify default fee amounts. These values display in this field. You can override this value as long as the referral has not been invoiced.

To enter a referral

1. From Manage referrals, click New.
2. Enter the client's full name, or if the client is already in the database, press Ctrl+L in one of the name fields to open the Find Referrals window, and find the client.
3. Enter the address, phone, and fax information (if not already populated by a Find).
4. Enter a Note if desired.

5. Enter information into the custom additional fields as needed. Use lookup (press Ctrl+L) in the fields for a list of available selections. If you do not alter the fields, they will simply populate with the default value you specified on the Set up module window.
6. If the Use Zip Areas option is enabled on the Set up module window, when you enter a value in the Zip field and press Tab, the City, St/Prov, and County fields are automatically populated with the appropriate value. Make changes to these values, if necessary.
7. Enter information in the other custom search fields where needed.
8. Click Search.
9. A list of providers displays in the lower half of the Manage referrals window. Select providers from this list as desired by double-clicking on them; an indicator (>) displays to the left of the provider record. To deselect providers, just double-click on them again to remove the indicator.

   If the list of providers is not satisfactory, narrow or broaden your search to receive the desired list. You are able to search as many times as you want before clicking Save.
10. (optional) Mark the referral as Ready to Invoice or Is A Referral. Depending on your organization, you may want to perform this step later.
11. Click Save to enter the transaction and have the system update the providers' referral records with the most recent referral date and time. The transaction data will be used when you generate letters to clients and providers, and it will be retained for your detail and summary reports.

    Note: If any of the providers you select do not meet the requirements of a provider (according to set up options), a message displays and iMIS will not allow you to select the provider.

Finding Referral Records

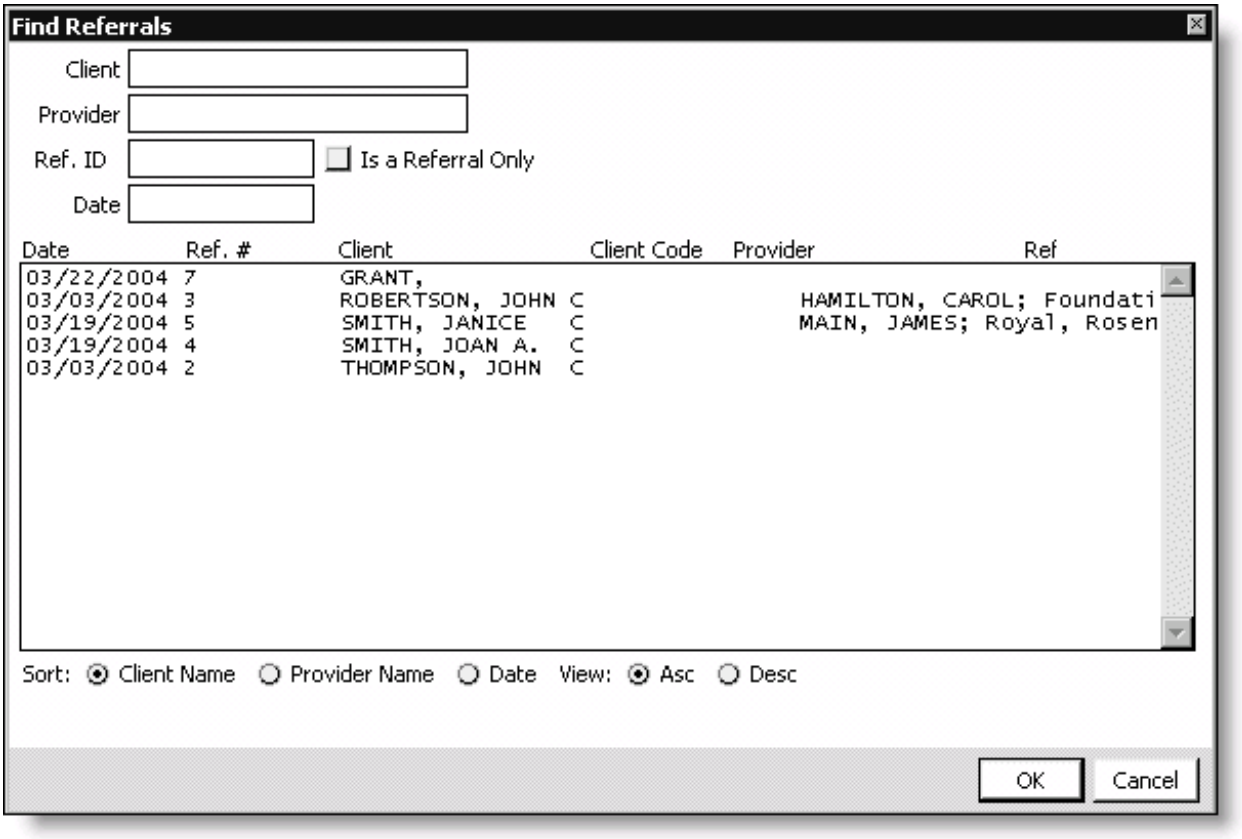
The Find Referrals window displays the calls referred to an individual provider, as well as the referrals provided to an individual caller, depending on your search criteria. The

default information provided includes date, referral number, client's name, client type ("Special Code"), provider's name, and any custom search criteria.

Note: You can specify what displays on the Find Referrals window on the Referral Advanced Setup window. See To set advanced options for more information.

You can open the Find Referrals window one of two ways:

- From Referrals, select Manage referrals, and click Find.
- When entering or editing a referral, press Ctrl+L in any of the name fields (First, M, or Last).



The Find Referrals window scrolls horizontally and vertically. The value in the provider list Maximum field on the Referral Advanced Setup window determines the maximum number of records displayed at one time on the Find Referrals window. A concatenated list of search criteria used for the referral (fields SEARCH_1 through SEARCH_5 in the Referrals table) displays with each record when you scroll to the right.

You can search for specific clients and/or providers by entering a text string in the Client or Provider fields.

When you select the Is a Referral Only option, iMIS displays only those records marked Is a Referral.

According to the criteria you enter in the top-half of the Find Referrals window, iMIS uses the following search logic to find and return a list of applicable referral records:

- CONTAINS – Add a comma after your search value for the system to use CONTAINS logic. For example, if you enter the beginning character of a search code followed by a comma, all records containing a code beginning with that character will be returned by the search.
- EQUAL TO – Enter a search value that does not contain a comma for the system to use EQUALS logic (searches for the exact value you entered).
- OR – Add the percent symbol (%) between values to have the system search using OR logic with a list string field. For example, if the search is A, B, and you want the members returned that have A or B in the field, you will search using A%B.
- AND – Add a forward slash (/) between values to have the system search using AND search logic with a list string field.

To find all existing referrals

View all existing referrals by clicking in the Client field and clicking OK.

To find referrals by client name

You can select referrals for a particular client by providing the complete or partial name.

To find referrals by provider

You can select referrals for a particular provider by providing the complete or partial name.

To find referrals by client and provider

You can narrow your search for referrals by using a combination of a client and a provider names.

Viewing Provider Information

The provider list on the Manage referrals window displays according to the options you select on the Referral Advanced Setup window. The information that displays in the scrolling list for each provider includes ID, individual name (if any), company name, phone number, total number of referrals and date last referred.

To view information for a particular provider, just select a provider in the list.

Note: Selecting a provider broadcasts the ID to any other customer windows that you may also have open; giving you quick access to information related to that candidate.

To view additional information about a provider

1. From Referrals, select Manage referrals.
2. Enter or edit a referral record.
3. Select the provider for which you want more information, and click Detail. The Provider Detail window displays.

Modifying Referral Records

You can modify referral records that you enter on the Manage referrals window.

To edit a referral record

1. From Referrals, select Manage referrals.
2. Open a referral record.
3. Click Edit.
4. Make your changes.
5. Click Save.

To delete a referral record

Note: If you have already invoiced a referral, you are not able to edit the referral.

1. From Referrals, select Manage referrals.
2. Open a referral record.
3. Select the provider you want to remove.
4. Click Delete.
5. A message displays asking you to perform your deletion. Click Yes.

To mark a referral as a no show

Note: When you mark a referral record as a no show, the referral count for that provider automatically decreases, but you must manually adjust any orders or invoices.

1. From Referrals, select Manage referrals.
2. Click Find.
3. Find the referral.
4. Click OK.
5. Double-click the appropriate referral. The system returns you to Manage referrals window with the referral information populated.
6. Click Edit.
7. Select the provider.
8. Select the No Show option at the bottom of the screen.

Processing Referral Orders

If you specify an additional fee product on the Referral Advanced Setup window, the Ref Fee and Ready to Invoice options display on the Manage referrals window to allow you to process reference fees that apply to successful referrals beyond the base referral sub-scription fee.

Perform the following tasks to process referral orders:

- Create referral orders
- Invoice open referral orders
- Enter payments for referral orders

To create a referral order

1. Admin Console: Home > Referrals, select Create referral orders.
2. Find the referral.
3. Select the Ready to Invoice option.
4. From Referrals, select Create referral orders to create orders for all referrals marked Ready to Invoice.

To invoice referral orders

Generating additional fee invoices occurs as a batch process that you handle through the Generate reports window. You invoice the referral fees for your subscribers directly from the iMIS Professional Referrals system.

Note: You cannot edit a referral order once it has been invoiced.

1. From Referrals, select Generate reports.
2. Select the Invoice report type.
3. Select the Print New Invoices report.
4. Click Run.

To enter payments for referrals

When you receive payments for referral services, you can enter them through AR/Cash as you would any other order.

1. From AR/Cash, select Enter and edit transactions> Cash receipts.

2. Click New.
3. Enter the customer Id, or click the Find icon to select a value. You can also enter the Invoice Number.
4. In the Check/CC field, enter the check number or credit card type, and press Tab.
5. Enter the Payment Amount, and press Tab.
6. Select one of the following transaction options:

- To apply cash to an item, double-click on the item in the list and enter the amount to apply to the item in the Amt Paid field.
- To partially apply cash to an item, select the line and enter the amount to apply to the item in the Amt Paid field.

7. Click Save.

Referral Lists

The section discusses building and maintaining your referral list, which is the list of current referral candidates from your customer database.

To build the referral list, the system creates and later updates, a list of referral candidates, which consists of the active REFERRAL subscription records that matched the Provider List User Search Filter (or the iMIS default).

To build a referral List

1. Add the REFERRAL subscription to all provider candidates and invoice them. If you use the default search filter, iMIS verifies that the Paid_Thru date is greater than the current date. In this case, the customer must pay the REFERRAL product before they will process when you rebuild search indexes.
2. Make sure all provider candidates have records in all Customer tables referenced in the Optional Search Fields area of the Set up module window.
3. From Referrals, select Rebuild search indexes. The system prompts you to confirm your choice before running the procedure, which can be lengthy.

4. Click Yes. As iMIS builds the list, it pulls the data maintained in the search fields you specified.

Troubleshooting Provider List Problems

If after running the rebuild indexes utility the provider list does not include all of the providers you expect, narrow the list down to one provider candidate that is not being added and check for the following:

- Does the provider candidate have a REFERRAL subscription?
- If you are using the default Search Filter, has the provider candidate paid for REFERRAL, and is the Paid Thru date greater than today's date?
- If you are using the default Search Filter, do the candidate and the subscription record both have a status of "A"?
- If you are using your own Search Filter, does the provider candidate meet all of the prerequisites, as well as Name.STATUS='A%'?
- Does the provider candidate have records in all of the Custom Tables specified as Search Field Names on the Set up module window?

Updating Referral List

Run the Rebuild search indexes procedure periodically to update it with new subscribers and to refresh the specified fields from the master file. Note that the time required to update your referrals list depends on how many records and fields are involved.

In general, be sure to update your referrals list whenever your provider data changes significantly.

Even if providers are listed, they may not be available for referrals. iMIS will check the search filter options before allowing you to select them. iMIS displays a message informing you that the provider is not eligible for reference if you select a provider who is not available for referrals.

Admin Console: Home > Referrals > Rebuild search indexes
Desktop: Referrals > Rebuild search indexes

Note: iMIS will not delete expired providers from the Ref_Provider table until their subscription to REFERRAL has been removed from their Dues/Subscription Item Detail window (from Customers, select Manage customers, find the customer record, select the Billing tab, and double-click the Referral activity). Thus, inactive providers may be listed as providers, although you cannot select them.

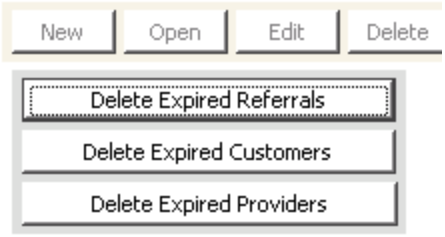
Expired Records

Professional Referrals makes deleting your old referrals, providers, and clients an automated process that you can perform for large groups at once. From the Delete expired window you can select to delete referral, provider, and client records that are older than a specific date.

Deleting Expired Referral Records

To determine whether a referral record should be deleted, iMIS compares the date you enter in the Older Than field on the Delete Old Referrals Referral Dialog window to the Referral.DATE_CREATED, Ref_Provider.LAST_REFERRED, and Ref_Client.DATE_CREATED values for each referral record.

Delete expired items window



Admin Console: Home > Referrals > Delete expired items
Desktop: Referrals > Delete expired

To delete expired items

1. From Delete expired items, click Delete Expired Referrals.
2. Enter the date before which you want to remove the transactions of completed referrals. The Older Than date defaults to the current system date. You can override this value.

3. Click OK.
4. A message displays asking you to confirm the deletion. Click Yes.

Deleting Expired Provider Records

To determine whether a provider should be deleted, iMIS compares the date you enter in the Older Than field on the Delete Old Providers Referral Dialog window to the Ref_Provider.LAST_REFERRED value for each provider record.

To delete expired provider records

1. From Delete expired items, click Delete Expired Providers.
2. Enter the date before which you want to remove providers. The Older Than date defaults to the current system date. You can override this value.
3. Click OK.

Deleting Expired Client Contact Records

To determine whether a client should be deleted, iMIS compares the date you enter in the Older Than field on the Delete Old Clients Referral Dialog window to the Ref_Client.DATE_CREATED value for each client record.

To delete expired client records

1. From Delete expired items, click Delete Expired Customers.
2. Enter the date before which you want to remove client records. The Older Than date defaults to the current system date. You can override this value.

Configuring Referrals

Setting up Referrals to enter and manage professional referrals involves the following multipart process:

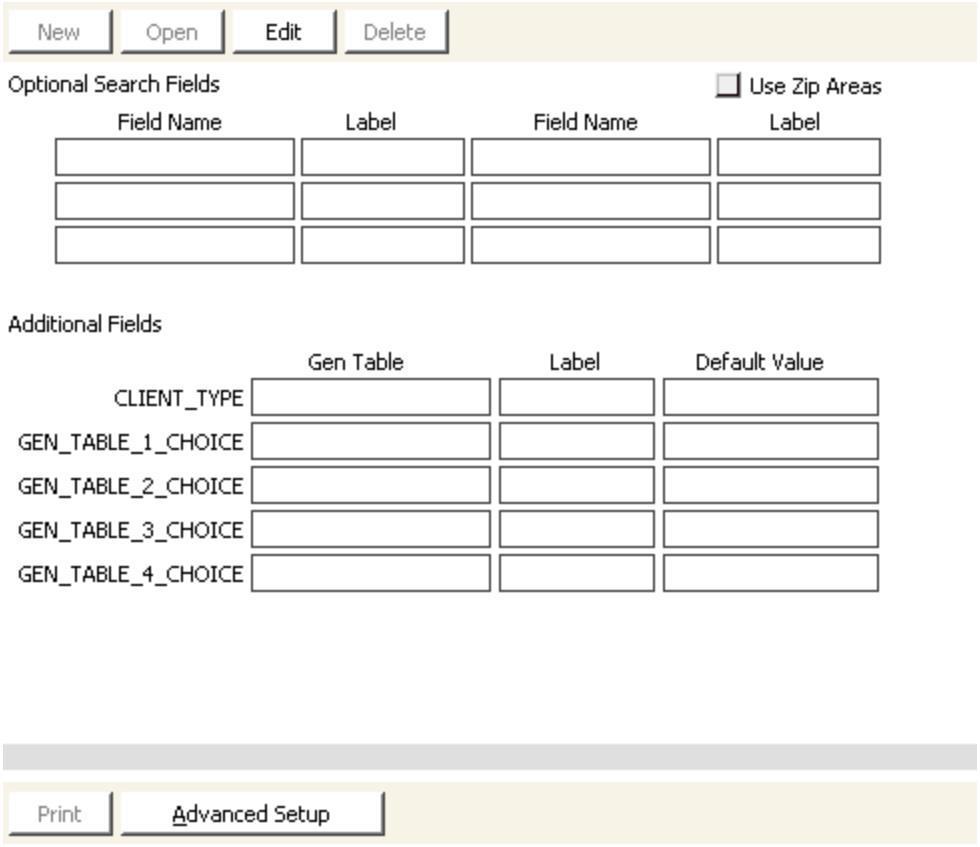
1. On the Billing Set up products window (from Billing, select Set up module> Products), you must set up a subscription-billing item (of type REFERRAL) in order to enroll your providers in the referral program.

2. On the Customers Set up general lookup/validation window (from Customers, select Set up tables > General lookup/validation), you must create your referral tables (REFERRAL_AREA, and up to four additional tables) and enter your organization's preferences.
3. Build a list of providers.
4. Set the options available on the Referral Advanced Setup window.
5. In Customers, establish any additional demographics (user-defined fields (see "Creating a user-defined table")) you need for searching for referrals.
6. (optional) On the AR/Cash Set up product codes window, create a product code (such as SALES-REFERRAL_FEE) for your referral service sales item. This code must begin with SALES and must match the code named on the Referrals Set up module window (from Referrals, select Set up module).

Setting basic Referrals options

The settings you enter on the Referrals Set up module window dictate certain variables to the system that it will use as guidelines in performing the daily operations.

Configure referrals options window



Admin Console: Home > Referrals > Configure referrals options
Desktop: Referrals > Set up module

Optional Search Fields

Use this area to specify your optional search fields:

Use Zip Areas – Select this option if you are maintaining zip code areas (zones) and want iMIS to locate providers based on the client's zip code.

If you disable this option, you can use the first field for an additional (sixth) search field, such as Name.COUNTY.

Note: Refer to Enabling Zip Code Search for instructions on setting up the Use Zip Areas feature.

Field Name – You can specify up to five character fields from the Name table and custom (except multi-instance) tables to be available for searching. You can also specify six

fields if you deselect the Use Zip Areas option. In most cases, these fields will point to either a user-defined demographic field or a list string field.

Note: When using these fields to search, iMIS will process the query on a CONTAINS basis - meaning it will return all values that contain the search term. For example, if you search for "600", the values 600, 1600, 2600, 6001, 6006 would all be returned. The search will also insert ANDs between each search field you use.

Note: Each provider you expect to use must have a record in all custom Tables referenced in Field Name. Otherwise, they will not be added when you run the Rebuild Search Indexes utility.

iMIS validates the Field Name entry to ensure that it refers to appropriate Name fields; it also autoformats the field's capitalization. iMIS rejects a field name in two cases: 1) If the field is not in the Name table or any custom tables, or 2) if the field is not a character field (for example, PAID_THRU).

The fields you specify will be used to create search indexes for providers and are populated by the Rebuild search indexes utility. The Referral module will reference these indexes when building lists of available providers for each client. These fields are stored in Ref_Provider.INDEX. The first thru sixth fields and have a length of 100 characters.

Each Field Name field has a limit of 30 characters.

Note: Any field over 255 characters long is considered a text field, and iMIS will not accept that entry.

Note: The first search field (top left) is available only when the Use Zip Areas is not selected.

Label – Specifies the prompt (label) that you want to display in the Manage referrals window to represent the search field. Label 1 refers to Field Name 1 (30-character limit).

Additional Fields

Use this area to specify your additional fields:

- Gen Table – Specifies up to five general lookup/validation tables. For each specified table, a corresponding field displays on the Manage referrals window and the values are saved in the Referral table.

  Note: You must have already created your general lookup/validation tables to reference them in this area. If your table name does not match an existing table, iMIS prompts you to correct the entry.

- Label – Specifies a label you want to appear on the Manage referrals window to represent the table.

- Default Value – The value you enter in this field is the default general lookup/validation table value to be used for a new transaction. You can select this value by using the lookup feature (Ctrl+L). The values will display in the Manage referrals window.

  Note: The Gen Table fields can be edited throughout the life of the referral record to maintain an ongoing status. For example, you can use one of these to track the referral status based on the information received from the provider.

  Advanced Setup button

  Opens the Referral Advanced Setup window where you can specify your advanced setup options.

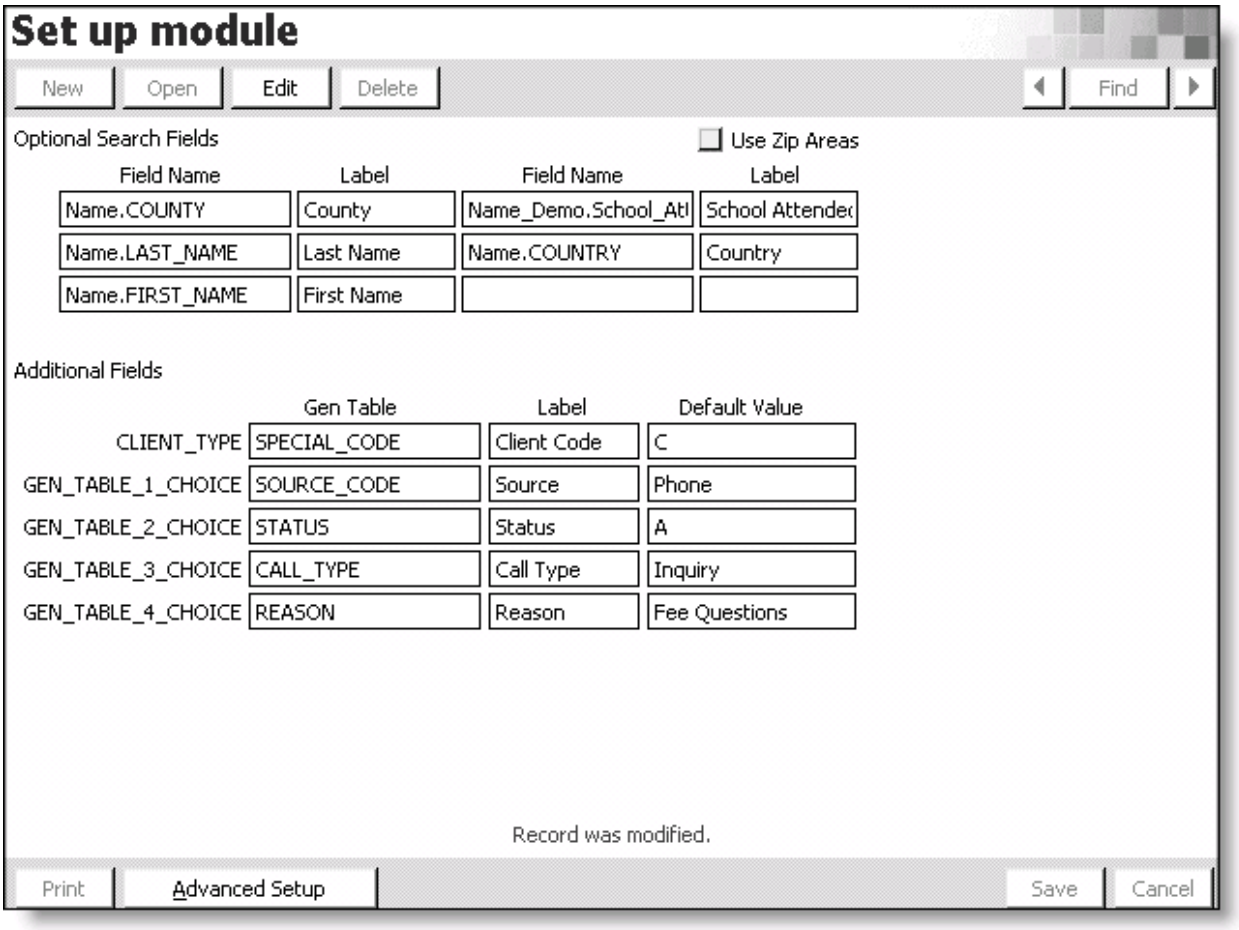
  To set basic referral options

1. From Configure referrals options, click Edit.
2. Specify your desired optional search fields. Once you enter the desired fields and labels, they will display at the bottom half of the Manage referrals window.
3. (optional) In the Additional Fields area of the window, define up to four fields to categorize your incoming referrals, plus one field to categorize the client. The general lookup tables you specify provide lookup, validation, and expansion for the fields.

   The data iMIS gathers for referrals is recorded in the following fields in the Referral and Ref_Client tables:

- Ref_Client.CLIENT_TYPE
- Referral.GEN_TABLE_1_CHOICE
- Referral.GEN_TABLE_2_CHOICE
- Referral.GEN_TABLE_3_CHOICE
- Referral.GEN_TABLE_4_CHOICE

After you enter the fields, they display in the top half of the Manage referrals window. The following example categorizes calls by Client Code, Source, Status, Call Type, and Reason.

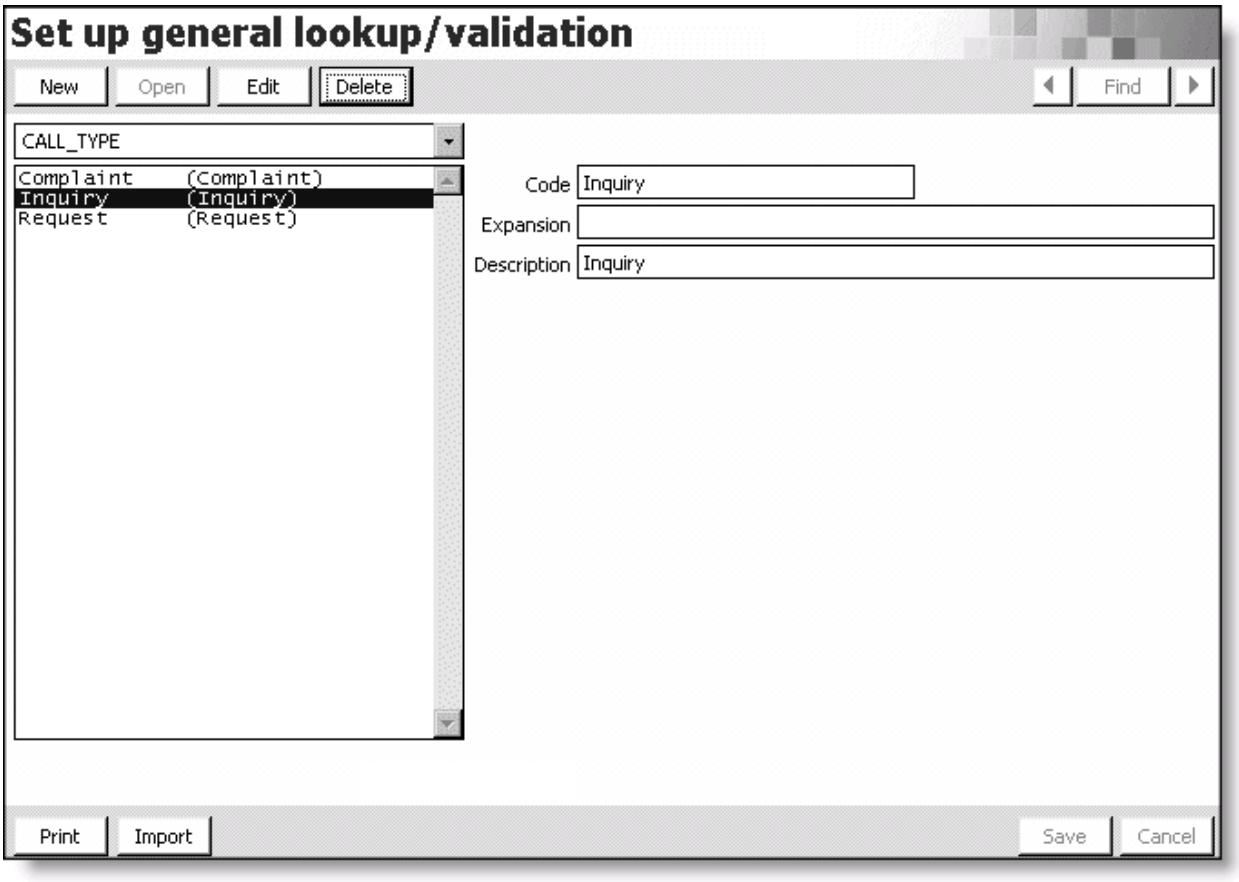


Example Set up module window displaying basic setup settings

To create a lookup for a search field

In the Professional Referral module, general lookup/validation tables provide the lookup, validation, and expansion for Additional Fields when you specify an existing general look-up/validation table on the Set up module window.

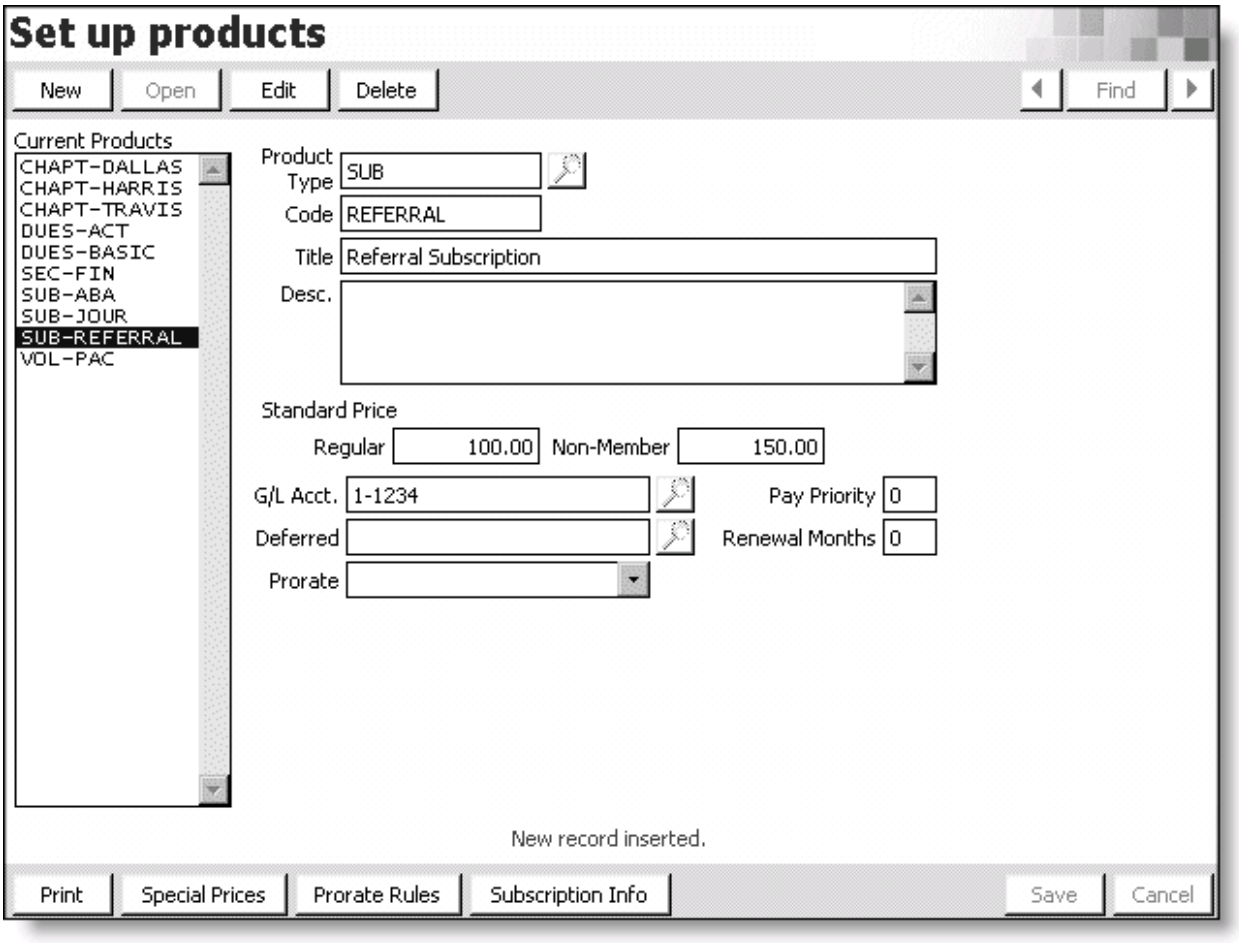
1. From Customers, select Set up tables > General lookup.validation. The Set up general lookup/validation window appears.
2. Click the drop-down list and select (New Table).
3. Enter the name of the table in the space provided. For example, CALL_TYPE.
4. Click Save. The new table name displays in the table list.
5. Click New and enter (as desired) the Code, Expansion, and/or Description values for all valid selections.
6. Click Save.
7. From Referrals, select Set up module. Enter the name of the general lookup/validation table as one of the Additional Fields. Enter a corresponding label that displays in the Manage referrals window.



Defining Referral Subscription Product Code

You need to create a subscription-billing item for your referral service. This is the item for which customers will be charged to start or extend their participation in the referral program.

Billing Set up products window



From Billing, select Set up module> Products

Current Products

A list of current products.

Product Type

Specifies a system-maintained code that lets Billing manage the relationships between the files and modules affected by the billing items. You can also use the lookup icon to select a Product Type. Use SUB for subscription.

Code

Use this field to assign a primary abbreviation to the product, which will be your code identifying this billing item type. This code must be REFERRAL.

Title

Enter a descriptive title for the Dues billing item type. When this billing item is referenced on most related data entry screens and renewal notices, this title will appear next to or in place of the billing code.

Desc

(optional) Enter a longer, descriptive explanation for the billing item type. This description displays only in this window for later reference.

Standard Price

Regular – Enter any default fee that you want to apply automatically when you generate a bill or enter a cash receipt for this item when no other amounts apply (from Standard Pricing or the Member Type Table). As you process Dues cash receipts, you can override this default fee on a case-by-case basis. If you leave the Standard Price field empty, there is no charge.

Non-Member – If you need to vary the fees for this item according to Member, Non-Member, or Member Type designations, specify these designations in the Member Types table. If you leave the Standard Price field empty, there is no charge.

G/L Acct

(Required for iMIS Financial Interface users) Identify the general ledger income account you want to credit for income relating to this item. The schedule for entries being posted to this account depends on which accounting method you selected in the Dues module.

Cash-Based – An entry posts to this income account when you process a cash receipt.

Accrual-Based – An entry posts to this income account when you generate a Dues bill.

Note: This step is not optional. To add providers correctly, they must have the REFERRAL product as a Subscription. If your organization does not charge for referrals, you can make this product free by not entering a price, but providers must have a Subscription.

To create the Referral subscription code

1. From Billing, select Set up module> Products. The Set up products window opens.

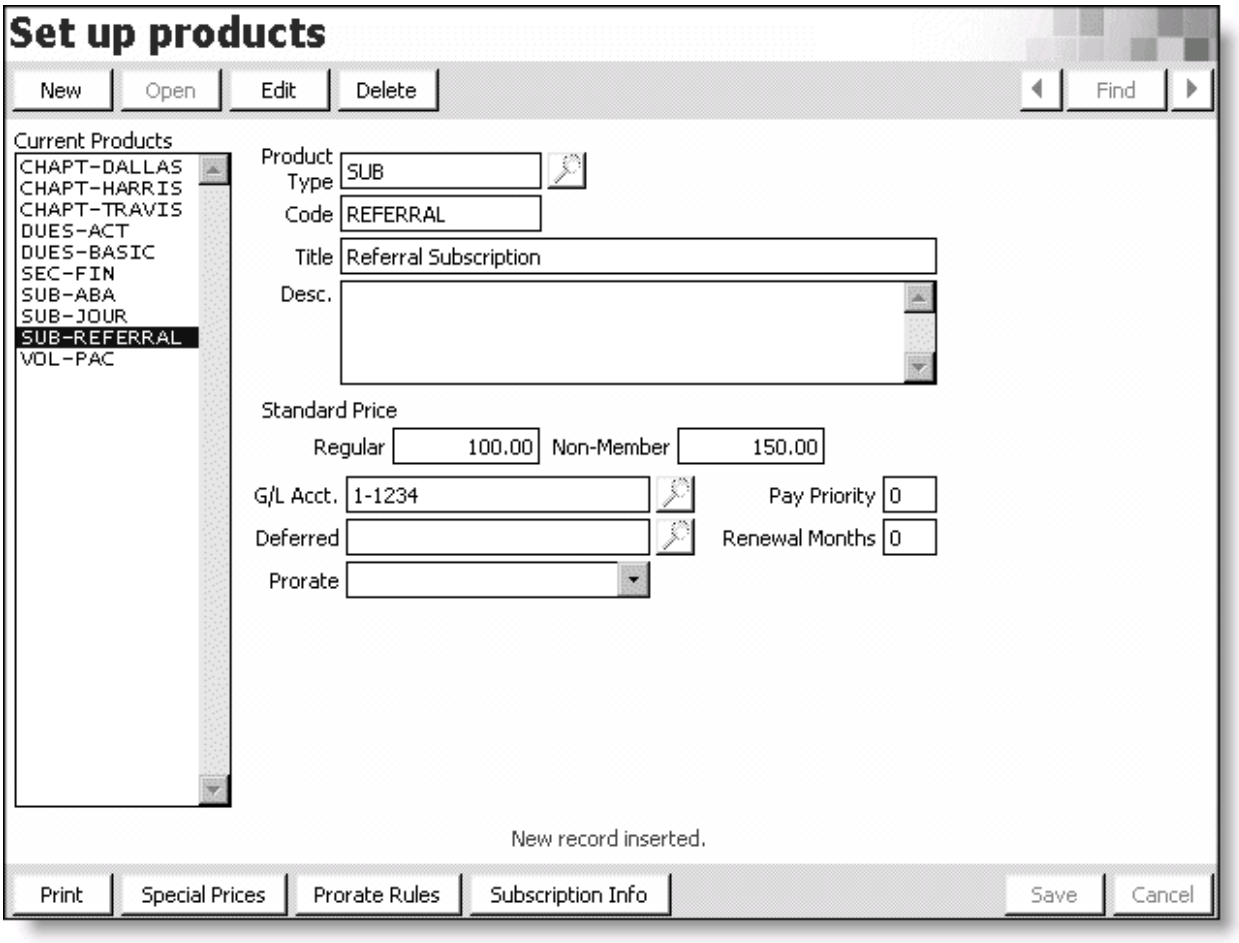
2. Click New.
3. Enter information for a new product. The Product Type and Product Code fields are required.
4. Click Save.

Defining Referral Fee Product Code

If you want to collect fees for referrals, create a sales product for this professional referral fee (Referrals Fee Product, Product Code) so that you can process referral transactions and invoices as you would any other order.

For each referral, iMIS makes a provision for this optional referrals fee. To activate this feature, set up a product for the referral fee in the AR/Cash module and then enter the product in the Referral Fee Product field on the Referral Advanced Setup window. You can specify a default amount for the product, or manually supply the amount on the Manage referrals window. You can change the amount anytime until the referral is invoiced.

AR/Cash Set up products window



From AR/Cash, select Set up products

Product Type

Specifies a system-maintained code that lets the AR/Cash module manage the relationships between the files and modules. Use SALES for sales item.

Code

Assign a primary abbreviation, which will be the identifying code for this sales item type. Use a custom code and remember it for future use. For example, REFFERAL_FEE.

Title

Enter a descriptive title for the sales item. When this item is referenced on most related data entry screens, this title displays next to or in place of the product code.

Description

(optional) Enter a longer, descriptive explanation for the sales item. This description displays only in this window, for later reference.

Standard Price

Regular – Enter any default fee that you want to apply automatically when you generate a bill or enter a cash receipt for this item when no other amounts apply. As you process cash receipts, you can override this default fee on a case-by-case basis.

Non-Member – If you need to vary the fees for this item according to Member, Non-Member, or Member Type designations, specify these designations in the Member Types table.

G/L Acct

(Required for iMIS Financial Interface users) Identify the general ledger income account you want to credit for income relating to this item.

To create the Referral fee code

1. From AR/Cash, select Set up tables > Products.
2. Click New and enter a new product code to be used for the referral fee.
3. Enter information for the product. The Product Type, Product Code, and G/L Acct fields are required.
4. Click Save.

Note: You must specify a G/L account number for this product for iMIS to process it correctly.

Enabling Zip Code Search

The zip code search feature allows you to restrict your search of providers to a specific zip code.

To enable zip code search feature

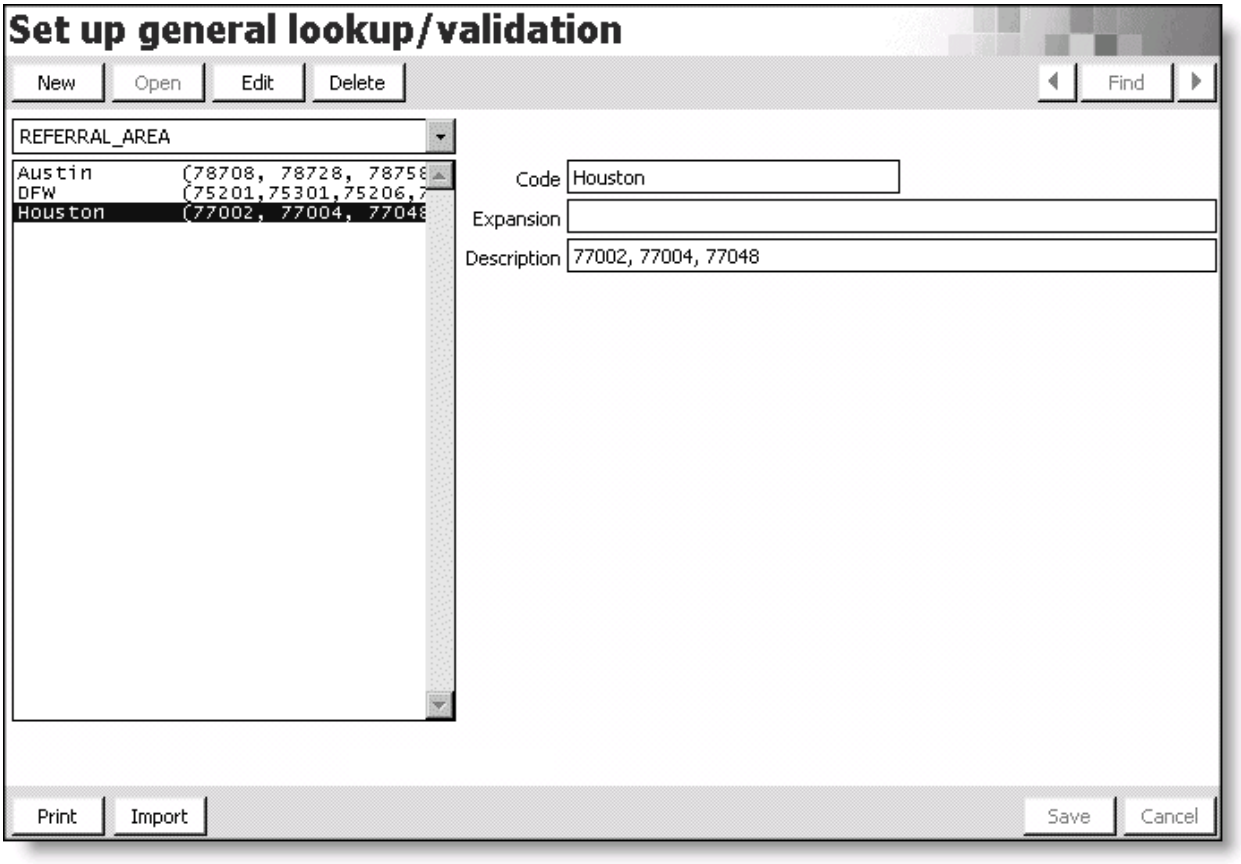
1. From Referrals, select Set up module to open the Set up module window.

2. Click Edit.
3. Select the Use Zip Areas option.
4. Click Save.
5. You will need to create the REFERRAL_AREA general lookup/validation table.

- From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
- Select New Table from the scrolling list.
- Enter REFERRAL_AREA in the space provided and click Save.
- Click New.
- Enter a Code and Description a zip code area. The Code should contain the name of the area (for example, the city's name or the first three numbers of the zip code). The Description should contain a list of all possible zip codes in that area separated by commas and no spaces.

  Note: If you want the search to be based on the first three numbers of the client's zip code compared to the first three numbers of all providers' zip codes, enter the Code normally, but enter the Description as the three digits only.
- Click Save.
- Repeat the process to enter additional codes.
- Restart iMIS . You must restart iMIS any time you change values in the REFERRAL_AREA table.
- Run the Rebuild search indexes utility (from Referrals, select Rebuild search indexes).
- From Referrals, select Manage referrals.
- Enter a test client with a zip code that you defined in the REFERRAL_AREA table.
- When you tab past the client's zip code field, ensure the Zip/Area Search Field auto-populates with the correct code from REFERRAL_AREA.

- Click Search.
- Make sure the correct providers displays.



Verifying Zip/Area Search Feature

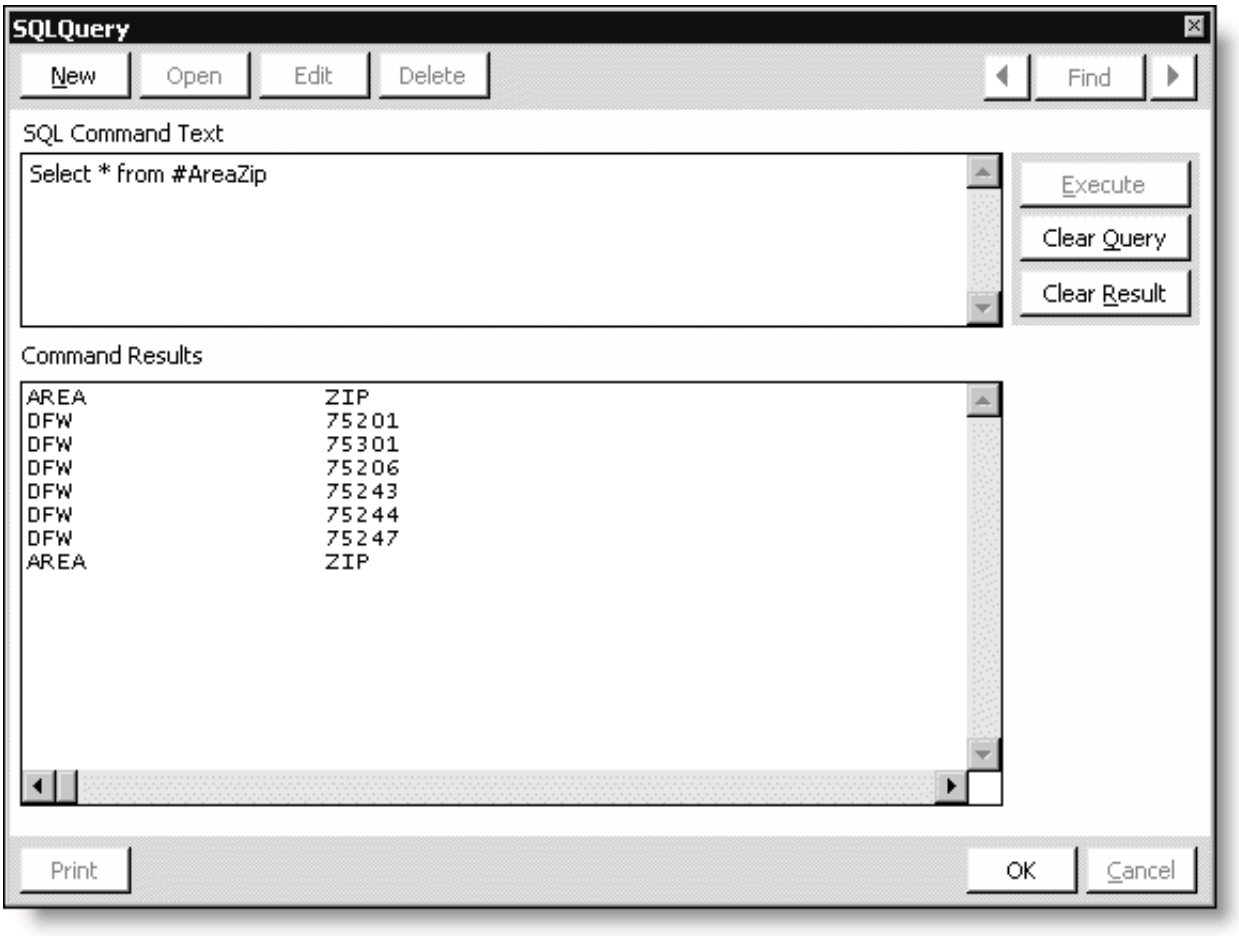
A temporary table is created in iMIS to handle the interaction between the REFERRAL_AREA general lookup/validation table and the Professional Referral module. The table is named #AreaZip. You can query this table, after an initial search to ensure the Zip/Area Search will be working properly.

To verify Zip/Area search feature is working properly

1. Select Utilities> SQL Query.
2. Enter the following query in the SQL Command Text area:

   Select * from #AreaZip

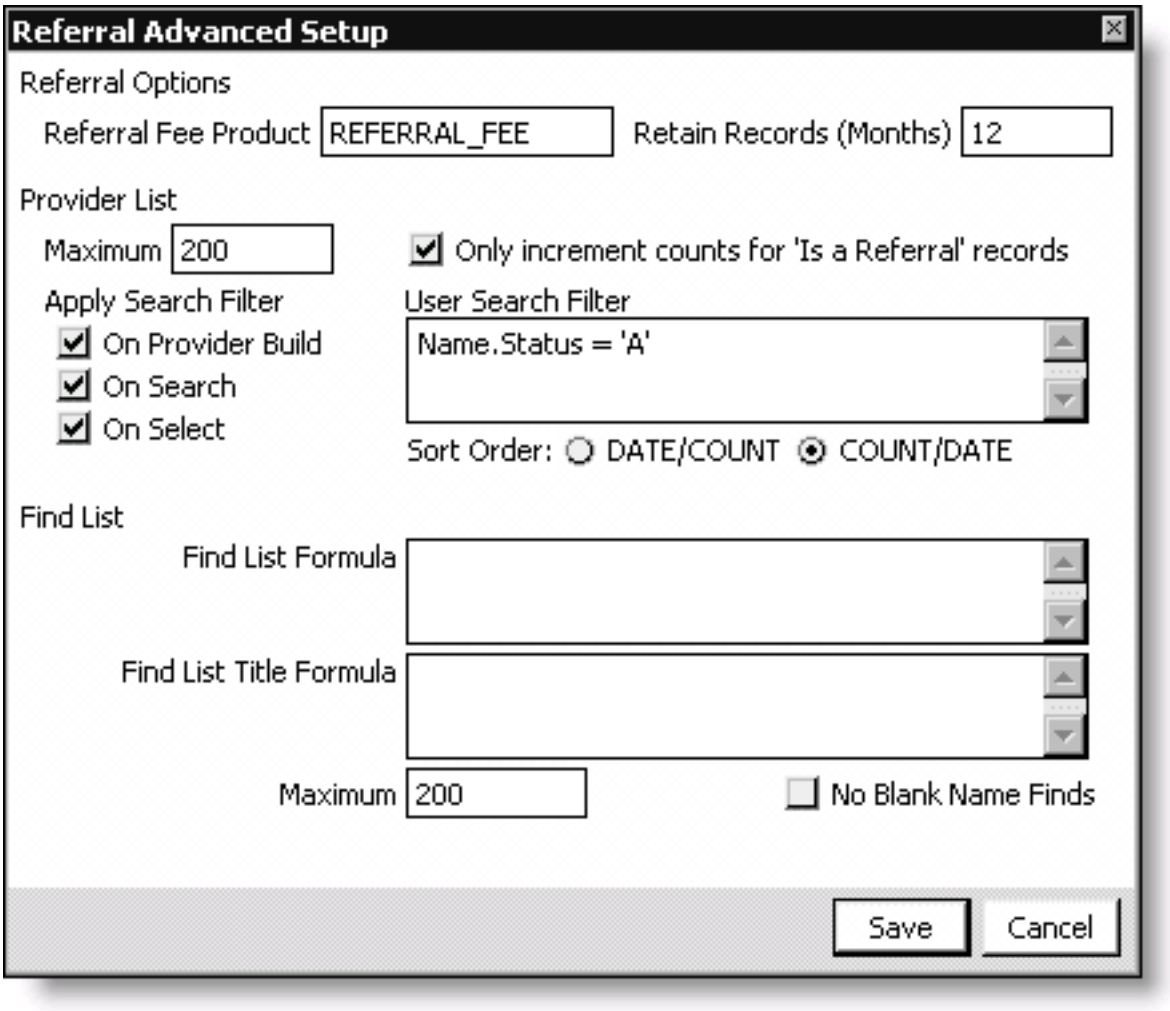
The AREA column in the Command Results area should contain the codes you defined in the REFERRAL_AREA table. Each zip code from the Description field should display in the ZIP column individually.



Setting Advanced Referral Options

Use the Referral Advanced Setup window to specify your referral search options, a Referral fee product, and display options for the Manage referrals and Find windows.

Referral Advanced Setup window



From Referrals, select Set up module, and click Advanced Setup

Referral Options

Referral Fee Product – (optional) Enter the product code (such as REFERRAL_FEE), if any, that you created for the referral service sales item. You will invoice providers for this item when you enter referral orders on their behalf, mark them as ready to invoice, and run invoices. Note that these are not the iMIS Professional Referral defaults.

Note: You must first create your Additional Fee product code on the AR/Cash Set up products window (from AR/Cash, select Set up tables > Products) to reference it here. If your entry does not match an existing product code, iMIS prompts you to correct it.

Retain Records (Months) – Enter the number of months to retain the transactions. Records will be deleted when the time elapsed is greater than this specified period of time, but you must run the Delete Expired Referrals utility to delete the records. iMIS will not do it automatically.

Provider List

Maximum – Enter the greatest number of records iMIS can return as a search result in the Manage referrals window. This feature helps avoid lengthy searching and provides a manageable results list.

Only increment counts for 'Is a Referral' records – When this option is enabled, iMIS increases the referral counts for providers when the Is a Referral option is checked for each referral. This option will have an impact on the sort order of the providers and reports.

When this option is disabled, all Referral records created will be counted in the provider's counts, whether or not Is a Referral is selected.

Apply Search Filter

- On Provider Build – Applies the search filter when running the Rebuild Provider Indexes utility, so all new providers will meet the custom criteria.
- On Search – Applies the search filter when searching for providers. The list will reflect the User Defined Formula.
- On Select – Applies the search filter when selecting providers for a referral. An error message displays when you select providers that do not meet the search criteria.

User Search Filter

(optional) iMIS uses the Provider List User Search Filter (or the iMIS default) each time it performs a search. This eliminates the possibility of referring a provider that does not meet the specified search criteria at the time of referral.

The following is the iMIS default search criteria for building the Provider List:

SUBSTRING(Name.STATUS,1,1)='A' AND SUBSTRING(Subscriptions.STATUS,1,1)='A'

AND Subscriptions.PAID_THRU>=DATEADD(day,-1,getdate())

When you leave the User Search Filter field blank, iMIS uses this default.

When different criteria are required, enter a SQL statement in the User Search Filter area of the Referral Advanced Setup window. The Name and Subscription tables are the only ones that work properly in the User Search Filter.

Note: iMIS will insert the Select…Where part of the SQL statement. When creating the filter, add criteria as you would at the end of a SQL query.

Note: If you make a change to the User Search Filter, the new conditions will override the iMIS default, making it possible that providers who are not current in their SUB-REFERRAL payments would be included in the Provider List. Make sure you have all necessary criteria included in the customized search filter.

Sort Order

Specifies the sort order of providers in the Provider List. Choose between DATE/COUNT (default) and COUNT/DATE orientation for your application.

The DATE/COUNT option sorts by providers whose Last Referred date is the oldest, then by the number of references.

The COUNT/DATE option sorts providers with the fewest number of referrals to the top of the eligibility list. When more than one provider has received the same number of referrals, they are sorted by the date of the last referral.

Find List Formula

(optional) You can specify an OMNIS calculation that will be used to display the list of referrals resulting from a Find. If this field is blank, iMIS will use a default formula.

The default formula will change with the different options selected, but is always similar to the following formula:

con("jst(",nam(Referral.DATE_CREATED),",'11:M/D/CY',",nam(Referral.REFERRAL_ID),",'11X',", nam(Ref_Client.LAST_FIRST),",'15X',","' ','1',"," pick(len(Ref_Provider.LAST_FIRST)>0,Ref_Provider.COMPANY,con(Ref_Provider.LAST_FIRST,pick(len(Ref_Provider.COMPANY)>0, ','; '),Ref_Provider.COMPANY))","'40X',' ','2'," con(Referral.SEARCH_1,'; ',Referral.SEARCH_2,'; ',Referral.SEARCH_3,'; ',Referral.SEARCH_4,'; ',Referral.SEARCH_5,'; ',Referral.SEARCH_6)","'100')")

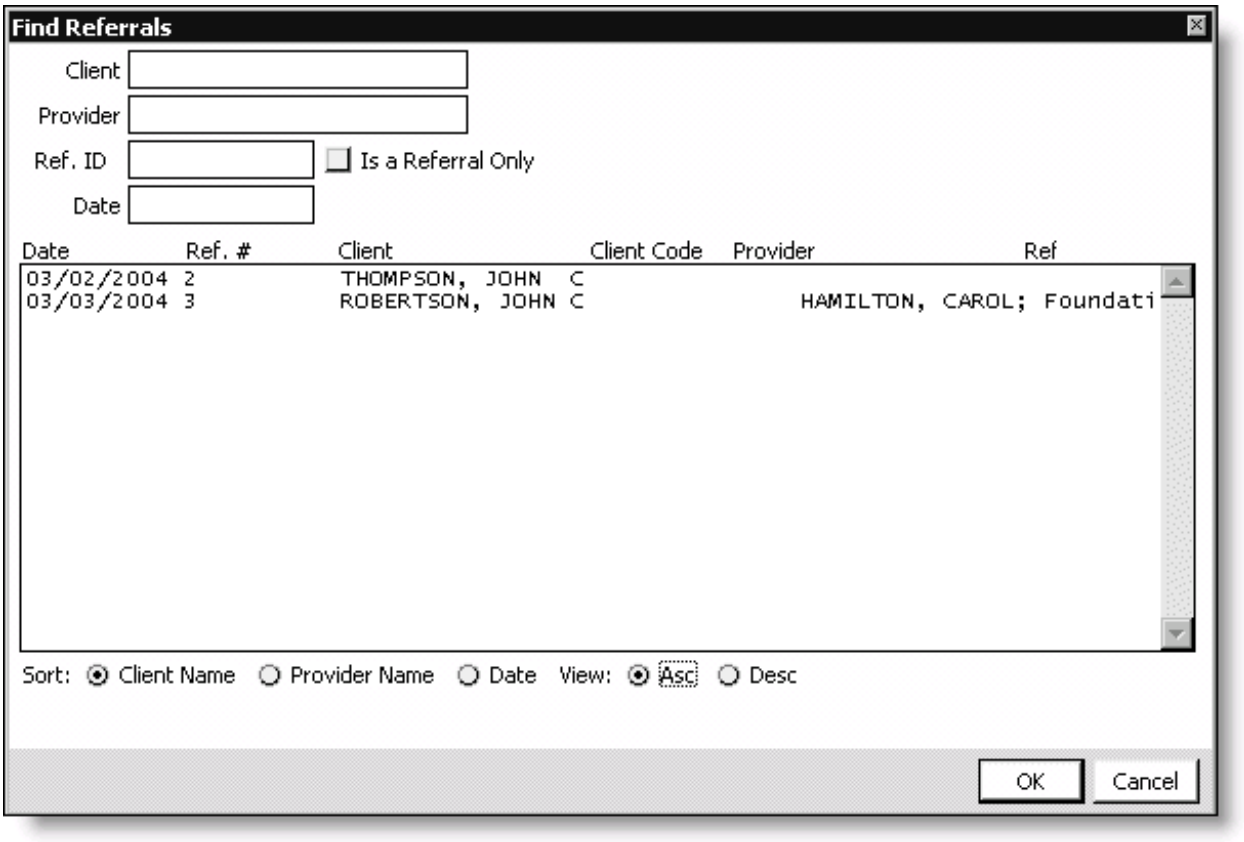
Note: To avoid incorrect results, use only the Ref_Client, Ref_Provider, and Referral tables when creating your formula.

Find List Title Formula

(optional) You can specify an OMNIS calculation that will be used to display the Find List Title in the Find Referrals window. It should coincide with the Find List Formula as described in the previous item. If this field is blank, iMIS will use a default formula.

The default Find List Title formula is:

con(jst("Date",11,"Ref. #",11,"Client",16, Referral_Control.ClientTypeLabel,16,"Provider",42,"Ref. Search Values",25))



Maximum

Enter the greatest number of records iMIS can return as a search result in the Find Referrals window. This feature helps avoid lengthy searching and provides a manageable result list.

No Blank Name Finds

Select this option to make sure every record entered has a value in one of the Name fields on the Manage referrals window.

To set advanced options

1. From Referrals, select Set up module.
2. Click Edit.
3. Click Advanced Setup to open the Referral Advanced Setup window.
4. Enter the desired Referral Options.

5. Enable the desired Provider List options.
6. Enable the desired Find List options.
7. Click Save.

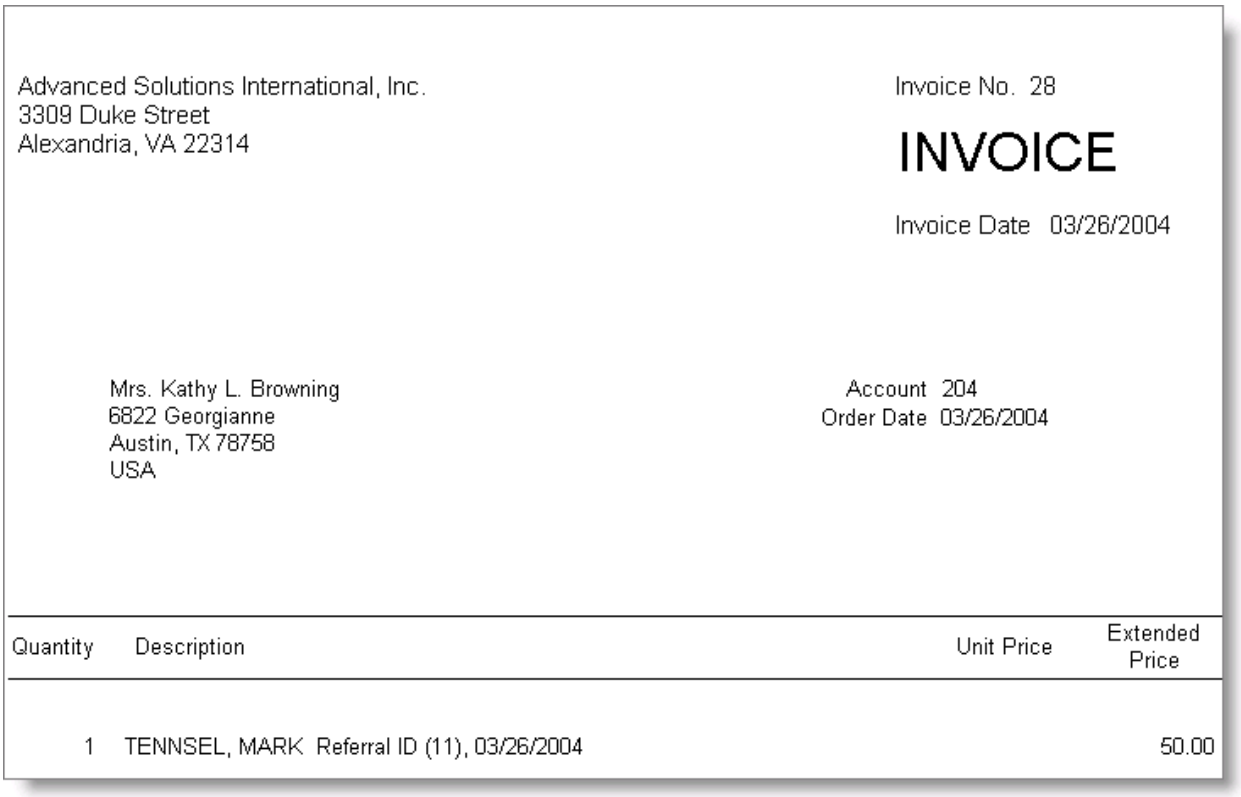
Reports for Referrals

When you select Generate reports from the Referrals task list, the standard iMIS report window displays.

The Generate reports window offers you a variety of printed output, including detailed rosters, overall status summaries, and letters. The initial Generate reports window is identical to that of every iMIS module. It gives you access to many categories of reports and options, from which you select specific formats and output. It also lets you choose the printer or other output device, and you can often vary the sort order and control the inclusion of providers and records, as well as other report-related items.

Print Invoice report

The Print Invoice report prints an invoice listing additional referral fees charged to clients.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Invoice No. 28

INVOICE

Invoice Date 03/26/2004

Mrs. Kathy L. Browning
6822 Georgianne
Austin, TX 78758
USA

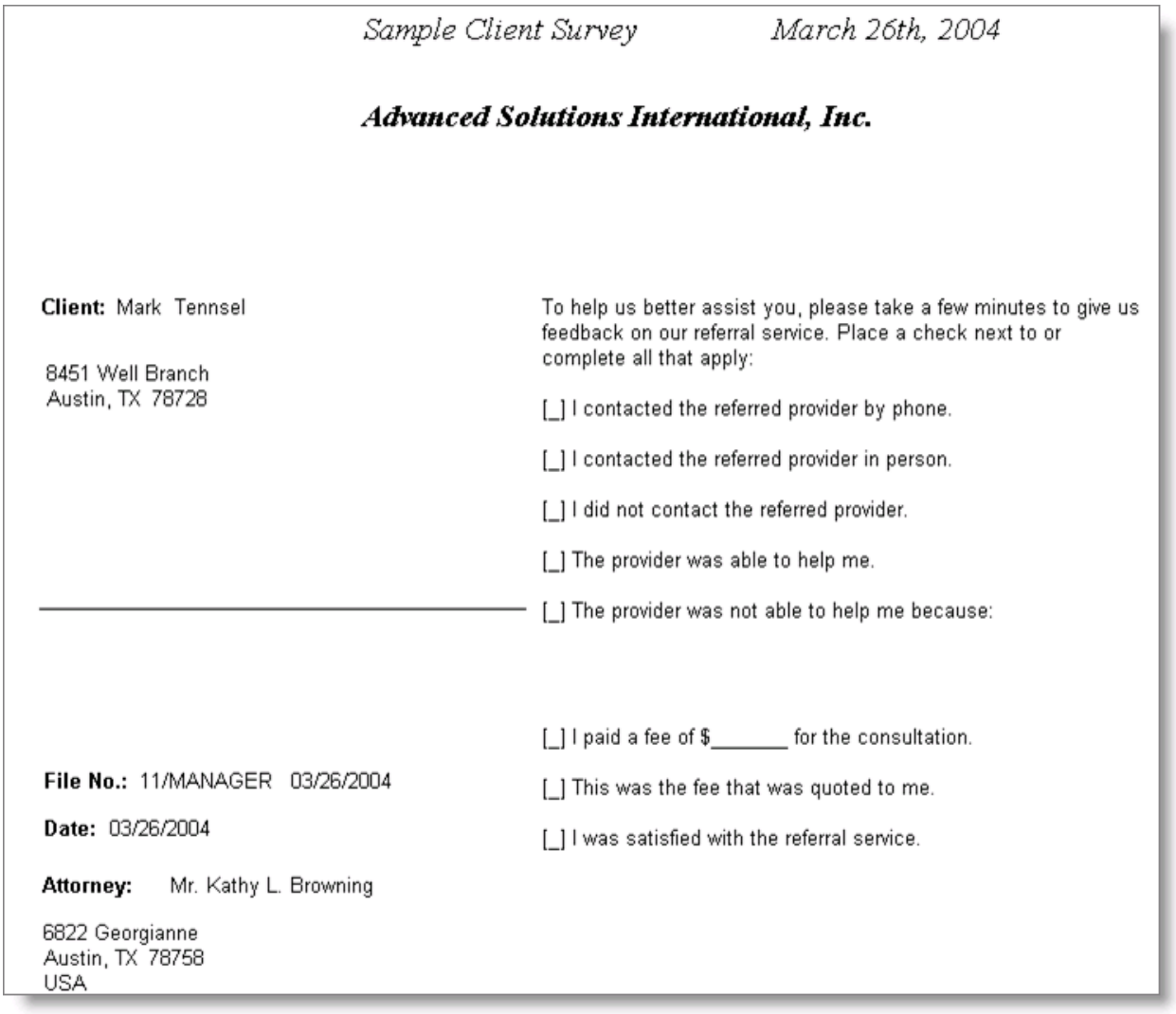
Account 204
Order Date 03/26/2004

Quantity	Description	Unit Price	Extended Price
1	TENNSEL, MARK Referral ID (11), 03/26/2004		50.00

Print Invoice report

Survey Reports

Client and provider survey reports are available to allow you to obtain and track feedback associated with the referral.



Sample Client Survey *March 26th, 2004*

Advanced Solutions International, Inc.

Client: Mark Tennsel

8451 Well Branch
Austin, TX 78728

To help us better assist you, please take a few minutes to give us feedback on our referral service. Place a check next to or complete all that apply:

[_] I contacted the referred provider by phone.

[_] I contacted the referred provider in person.

[_] I did not contact the referred provider.

[_] The provider was able to help me.

[_] The provider was not able to help me because:

[_] I paid a fee of $_____ for the consultation.

File No.: 11/MANAGER 03/26/2004

Date: 03/26/2004

[_] This was the fee that was quoted to me.

[_] I was satisfied with the referral service.

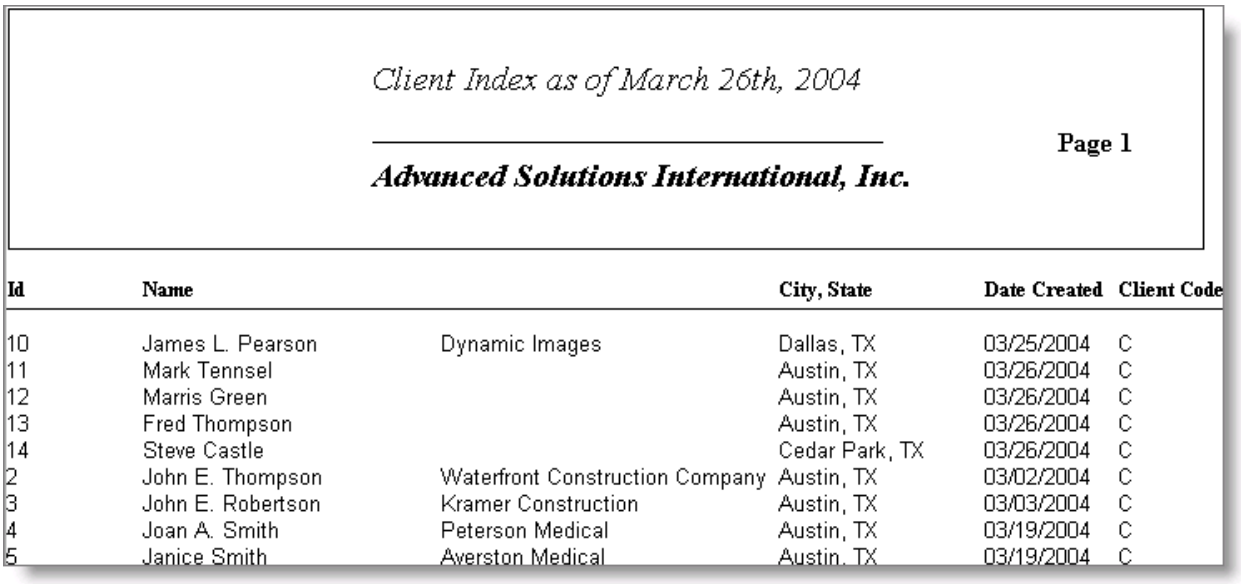
Attorney: Mr. Kathy L. Browning

6822 Georgianne
Austin, TX 78758
USA

Client Survey report

Roster Reports

Roster reports are available to allow you to print a list of providers or clients.



Client Index as of March 26th, 2004

Page 1

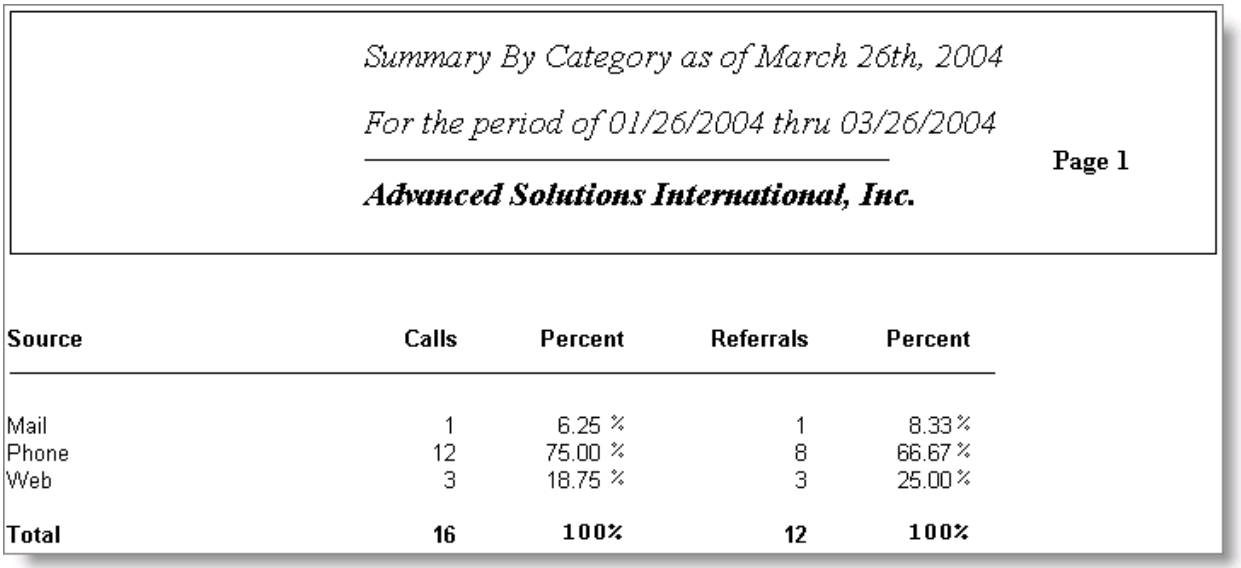
Advanced Solutions International, Inc.

Id	Name		City, State	Date Created	Client Code
10	James L. Pearson	Dynamic Images	Dallas, TX	03/25/2004	C
11	Mark Tennsel		Austin, TX	03/26/2004	C
12	Marris Green		Austin, TX	03/26/2004	C
13	Fred Thompson		Austin, TX	03/26/2004	C
14	Steve Castle		Cedar Park, TX	03/26/2004	C
2	John E. Thompson	Waterfront Construction Company	Austin, TX	03/02/2004	C
3	John E. Robertson	Kramer Construction	Austin, TX	03/03/2004	C
4	Joan A. Smith	Peterson Medical	Austin, TX	03/19/2004	C
5	Janice Smith	Averston Medical	Austin, TX	03/19/2004	C

Client Index report

Summary Reports

Several summary reports are available, including a report that allows you to summarize referrals by Source, Status, Reason or Type.



Summary By Category as of March 26th, 2004

For the period of 01/26/2004 thru 03/26/2004

Page 1

Advanced Solutions International, Inc.

Source	Calls	Percent	Referrals	Percent
Mail	1	6.25 %	1	8.33 %
Phone	12	75.00 %	8	66.67 %
Web	3	18.75 %	3	25.00 %
Total	**16**	**100%**	**12**	**100%**

Summary By Category report

Reporting in iMIS

Reporting Essentials

The Reporting tools in iMIS can be used for a wide range of tasks. Reports span a broad range of outputs for all of the iMIS modules, including rosters, status summaries, letters, badges, and statistical reports. This section covers essentials such as:

- Creating reports from IQA
- Using and running reports
- The Generate reports window and its options
- Secondary reports windows with field definitions
- Output categories and Report Destination options
- Overriding report margins and sort orders
- Cloning reports

Using Standard iMIS Reporting Tools

The standard reporting functions available across all iMIS modules include the following:

- Run a report
- Modify a standard report
- Enter search selections, including adhoc searches
- Clone report specifications
- Run daily and month-end financial reports
- Export report data
- Generate and manage mass report activity records
- Generate letter reports with both Quickletter and the MS Letter System

The reporting features all require knowledge of some basic aspects of iMIS. You will need familiarity with these associated parts of the system:

- The report and output categories
- The Report Destination options
- The process for overriding report margins and sort orders
- The process for cloning a report
- The record selection options for various output types

Authorization Levels for Reports

What users can see and do in reporting depends on which authorization level they have set on the Users window for the module being used (select System Setup > Security administration > Users):

- Accessing the Generate reports task list item requires level two (2) authorization.
- Updating the report specifications requires a system management level eight (8) authorization.
- Viewing a complete list of reports available (Utilities > Report Specs) requires level eight (8) authorization.

iMIS Report Terms

Key concepts for determining the required report options include the following:

Format

The report format is the physical layout (appearance) of the report, which involves both the design and the content (what fields or data elements appear on the report). In a columnar detail report, each line contains certain data elements, such as a contact name, company name, city, state, and join date. The format also specifies column headings, the order in which data elements display on the line, the space allowed for printing and between elements, and so on. The format does not control which records are queried (selected) in the report.

Selection/Search

Some reports allow the selection of customer records to be used to generate the report. Selecting records does not control the format or the sort order. In a columnar detail report, the record selection controls the lines that print on the report, not the columns; each line typically corresponds to a specific record, while a column relates to a field in a record. Selections are generally based on field values; records are included in a report run if its contents match the selection criteria. Search criteria may be simple, such as “All Members,” or complex, as in an ad hoc search.

Sort Order

Dictates the order in which the details print on the report. Like the selection criteria, it is normally based on field values. However, it applies only to the records that were selected based on the search criteria, so you can specify a different field set for sorting the output. For example, you can first select records by customer type and then sort the results by ZIP code.

Standard Report

Includes preset iMIS report formats, which include rosters, labels, letters, and statistical reports. Most standard reports give you significant control in selecting the records and allow sort order overrides. However, pre-built standard reports have more limitations on the format or layout of the report.

Ad Hoc Report

Omnis facility used to build custom reports. The Ad Hoc Report Writer gives you total control over the entire report, including the format, record selection criteria, and sort order. Any customized report can be added to the Available Reports selection lists of any iMIS module.

Running a Standard Report

To run a standard report

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

1. From the reports window, select a report type from the Report Types list.
2. Select an available report from the Available Reports list.

3. Click Run. Depending on the report type, the report will run or a window will open, prompting you to select the date range for the report.
4. Enter or select the date range.
5. Click OK.

Modifying a Standard Report

You can make certain changes to the appearance or the order of the report output by making selections from the Options drop-down list on the Generate reports window. The list contains several options, and their availability varies from report to report.

To view report options

1. From the reports window, select a report type from the Report Types list.
2. Select an available report from the Available Reports list.
3. Click Options. The options available for selection will appear bolded. Use the Options list to make a one-time change at runtime, or you can save the report under a new name with the same parameters.
4. Click Run.

To adjust margins

The Margins option allows you to control the layout of your report or other output. You can perform the following tasks:

- Adjust margin settings to suit your printer.
- Top, Bot, Left Margin - The actual print area and built-in margins vary among laser printers, so these settings may need to be adjusted. Margins are critical for output that must fit in a target area, such as labels.
- Specify a repeat factor to generate multiple reports for each address.
- Enter measurement settings (widths, space between, and margins) in decimal fractions of inches (for example, if you want 1-1/2 inches, enter 1.5 without units).

To make adjustments to the margins:

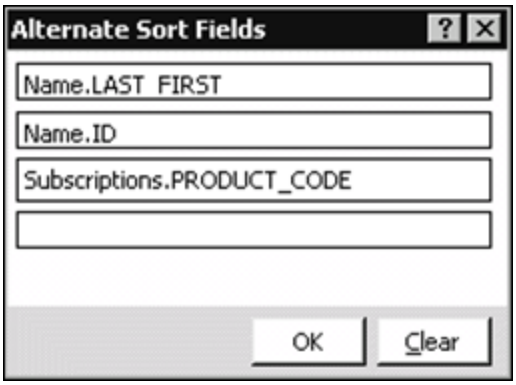
1. From the reports window, select a report type from the Report Types list.
2. Select an available report from the Available Reports list.
3. Click Options and select Margins. Use the Options list to make a one-time change at runtime, or you can save the report under a new name with the same parameters.
4. Change the margins and click OK.
5. Click Run.

To change the sort fields

The field format for entering data is Table.FIELD. The table name appears first in title case, followed by a period separator and the field name in all caps, for example, Name.FULL_NAME. The Alternate Sort Fields window allows you to enter the Table.FIELD name for a maximum of four sort fields. To specify a multiple-field sort, enter the first-order sort field in the first text box, working down to the lowest-level sort field in the fourth text box. The sort fields you enter must be selected from the tables used for the report.

Note: For some report types, the Sort option is grayed out (unavailable) on the Options list.

1. From the reports window, select a report type from the Report Types list.
2. Select a report from the Available Reports list.
3. Click Options and select Sort Fields. The areas you can change appear bolded. For example, using the data in the following window, your report sorts in the following order: last name, ID, and product code.
4. Change the alternate sort fields to new sort fields selected from the tables to be included in the report.
5. Click OK to change the sort order.



Example of an Alternate Sort Fields window.

Using Ad Hoc Searches

Ad hoc searches allow refinement of the standard report search criteria used to select specific records needed for a report. After the search is defined, the search instructions are saved in a list of predefined search formats for future use. Depending upon the selected report, you can define your search by using multiple tables.

You can specify selections based on multiple-field comparisons from one or more files. The files that are available for selection depend on the module and the menu function you choose.

Ad hoc searches can be as simple as one line searches that look for an exact match on values in a single field or as complex as a multiple-line item or multiple-group search. You can have up to 50 criteria for each selection. This search function supports extremely complicated queries, and supports Boolean logic statements as well as AND and OR connections.

Note: For selection between values, such as dates, combine the Greater than and Less than conditions.

To create an ad hoc search

Ad hoc searches allow refinement of the standard report search criteria used to select specific records needed for a report. After the search is defined, the search instructions are saved in a list of predefined search formats for future use. Depending upon the selected report, you can define your search by using multiple tables.

1. From the reports window, select a Report Type and related Available Report.
2. Click Options and select Search Format to display the Select Search Instructions window, where you can perform the following tasks:

- Create a new ad hoc search.
- Edit an existing ad hoc search.

3. Click New or select an existing search format and click Edit on the Select Search Instructions window. The Search Instructions window displays.
4. Enter a descriptive name for the ad hoc search in the Search Name field.
5. Select the ad hoc search criteria.
6. Click Save to accept the search instructions and close the Search Instructions window.
7. Click OK on the Select Search Instructions window.
8. Click Run to generate the report.

Modifying an Existing Ad hoc Search

1. From the reports window, select a Report Type and related Available Report.
2. Click Options and select Search Format to display the Select Search Instructions window.
3. Select the name of the search and click Edit. The Search Instructions window displays, allowing you to make changes to the search criteria.
4. Click Save.

Examples of Ad Hoc Searches

When you run the Open Items by Product report, you can enter search selection (search format) criteria to specify which line items will be listed. Any field contained in the Subscription, Name, or Product files can be used in the search criteria. Refer to the following examples from the Billing module for more information.

Example 1: To search by bill date

1. Go to Continuum, select Membership Reports > Billing reports.

2. Select Open Invoices from the Report Types list.
3. Select Open Items by Product from the Available Reports list.
4. Click Options and select Search Format to display the Select Search Instructions window.
5. Click New to display the Search Instructions window.
6. Enter the new search instructions. For example, enter the following data to search for bills with a non-zero balance run on 10/1/01:

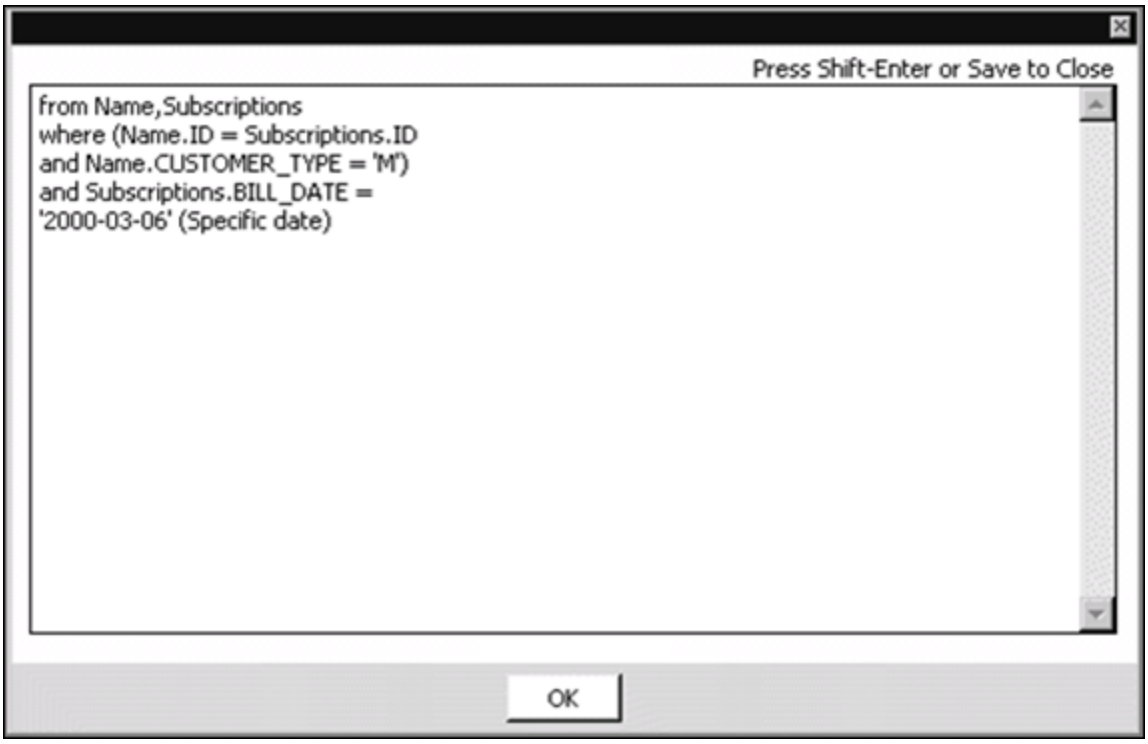
   Subscriptions.BILL_DATE = 10/01/2001

   Subscriptions.BALANCE <> 0

   Note: BILL_DATE corresponds to the Run Date field on the Process billing window (from Billing, select Process billing). Make sure to consider whether the Run Date was over-written.
7. Click Save to accept the search instructions and close the Search Instructions window.
8. Click OK to close the Select Search Selections window.
9. Click Run to generate the report.

   If you select the Calculation mode, entering the following calculation expression on the Comparison Value window verifies that the Bill Date matches today's date.

   from Name,Subscriptions
   where (Name.ID = Subscriptions.ID
   and Name.MEMBER_TYPE = 'M')
   and Subscriptions.BILL_DATE =
   '2000-03-06'(Specific date)



Example of the Comparison Value window.

If searching for multiple customer types, use the following command sequence:

From Name,Subscriptions.ID
and Name.CUSTOMER_TYPE = 'M'
or Name.CUSTOMER_TYPE = 'CM'
and Subscriptions.BILL_DATE =
'2000-03-06' (Specific date)

Caution! Any ad hoc search instruction must also include any filter that would already be inherent within the cycle and renewal printing process (for example, specific customer type and/or categories, printing flags, and specific products).

Example 2: To search for specific products

You can create meaningful searches to look at the status of open billing balances. For example, if you want to see the balances for specific products, set the PRODUCT_CODE equal to those codes only:

1. Go to Continuum, select Membership Reports > Billing reports.

2. Select Open Invoices and select Open Items by Product.
3. Click Options and select Search Format to display the Select Search Instructions window.
4. Click New to display the Search Instructions window.
5. Enter the new search instructions:

- To search for product codes with a balance:
  Subscription.PRODUCT_CODE = BASIC,JOUR
  Subscription.BALANCE <> 0
- To specify comparisons for the codes to be excluded:
  Subscription.PRODUCT_CODE <> PAC,SCHOL
  Subscription.BALANCE <> 0p
- To print open items for an entire group or type of product, such as all open subscription lines:
  Product.PROD_TYP = SUB
  Subscription.BALANCE <> 0

6. Click Save to accept the search instructions, and close the Search Instructions window.
7. Click OK to close the Select Search Selections window.
8. Click Run to generate the report.

Example 3: To search by customer type

Any field in the Name table can also be used for searching. Customer type is a common search option.

1. Go to Continuum, select Membership Reports > Billing reports.
2. Select Open Invoices and select Open Items by Product.
3. Click Options and select Search Format to display the Select Search Instructions window.
4. Click New to display the Search Instructions window.
5. Enter the new search instructions with this criteria:
   Name.CUSTOMER_TYPE = M

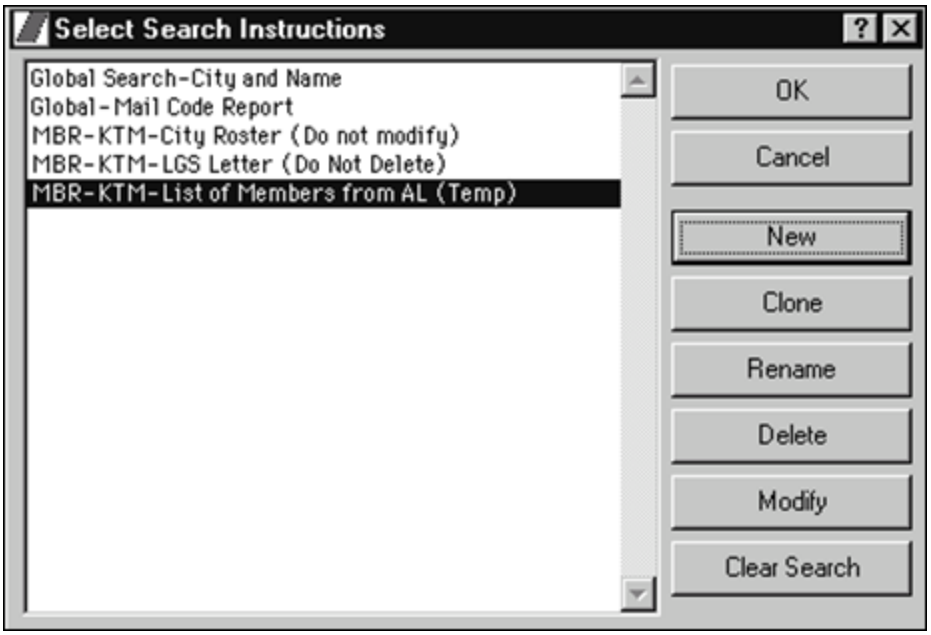
Name.STATUS Begins with A
Subscription.BALANCE <> 0

6. Click Save to accept the search instructions, and close the Search Instructions window.
7. Click OK to close the Select Search Selections window.
8. Click Run to generate the report.

Managing Ad Hoc Searches

Since Ad Hoc searches are created globally in the system, there is the potential to build up a long list of ad hoc searches. When you create and use searches, consider these suggestions (based on client experience) to help manage them:

1. Create a naming convention that will assist in identifying the creator/owner of the ad hoc search. This could include the individual's initials or last name information, for example, KTM - List of Members by State.
2. Group the searches in a manner that will make them easy to find on the search list. For example, group them by organization department or search category, MBR – KTM – List of Members by State.
3. Include a note in the title not to modify or delete the ad hoc search if you do not want other's to change or update the search selection criteria. (For example, MBR – KTM – List of Members by State Do Not Modify).
4. Include a note in the title if the search is temporary with instructions when it can be removed. For example, MBR – List of Members from AL (TEMP-delete After 2/1/01).
5. Create a group of general searches that are commonly used by all staff members. (General – List of Members from the same Organization).
6. Review the list of Ad Hoc Searches every six months to remove duplicates or temporary searches.



Manage Ad Hoc searches in Select Search Instructions window

Cloning a Report (Permanent Report Modifications)

Cloning allows copying of the specifications from an existing report and modification of the cloned version. Cloning avoids duplication of effort when two similar reports are being run.

Note: To access the Report Specifications window (select Utilities> Report Specs), you must have an authorization level of eight (8) or higher set on the Users window.

Typical reasons for making modifications to report specifications include modifying sort orders and margins, adding additional fields, or adding message text.

Setting Report Print Options

The report Options field communicates various instructions to the dialog box and/or report that can affect the contents or appearance of the output or, in some cases, change the processing steps during the running of the report. The options fall into three main categories:

- Yes/No type options that may appear as checkboxes on the secondary selection dialog box. Typically, these are used to print or suppress the printing of certain types of information. These options typically appear as strings that are prefixed with “PRINT_” (option

checkbox will default to on) or “NO_” (option checkbox will default to off). For example, PRINT_HOME_PHONE would set the default to print the home phone number while NO_HOME_PHONE would set the default to not print the phone number.

- Options that will enable a specific selection prompt to appear on the related report dialog box.
- Options that will force certain data updates to occur as the data is printed on a report.

Report Options by System/Category

There are many report options available for frequently used reports. For Yes/No type options, a positive option is prefixed with PRINT_ and a negative option is prefixed with NO_.

Below, options are grouped by system module and report category. Be aware that certain report options may not apply to all reports within the category and that obscure/specialty options (not embedded in the standard report specification table) can be added when cloning a report.

AR - Account Status (Trial Balance & Statements)

- PRINT_PAID_INVOICES: Option to print closed or zero balance invoice items.
- PRINT_DEBIT_BALANCES: Option to include customers who have an overall positive or debit account balance.
- PRINT_CREDIT_BALANCES: Option to include customers who have an overall negative or credit account balance.
- PRINT_EXCLUDE_FUTURE: Option to exclude transactions dated in advance of the Aging Date.
- PRINT_SUMMARY: Option to print only total balances per each customer as opposed to individual open items.

COMMITTEES/MEMBERSHIP - Various Report Options that print address data

- ADDRESS_BUTTONS: Enables the radio button address selection section to appear on the report's dialog box at run time. This lets the user select to print no address, preferred

bill or preferred mail, or a specific address on the labels.

- PRINT_BARCODE: Option to print the USPS barcode at the top of each label.

COMMITTEES/MEMBERSHIP - Letters

- EMAIL: Send the letters by email as opposed to normal printing of the letters.
- WORDOUT: Produce normal, printed output.

COMMITTEES/MEMBERSHIP - Exports

- PRINT_HEADER: Print a header record with the output field names at the top of the export file (standard for Microsoft Word merge files).
- PRINT_QUOTATIONS: Print quotations around each output field (for example, comma delimited output).
- EXPORT: Create the output as an export file.

COMMITTEES - Rosters

- PRINT_HOME_PHONE: Print home phone number.
- PRINT_EMAIL (Crystal Only): Print e-mail address.
- PRINT_WEBSITE (Crystal Only): Print Web site address.
- PRINT_DATE_APPOINTED: Print date appointed to committee.
- PRINT_TOTALS: Print total number of people in roster.

COMMITTEES - Labels

- ADDRESS_BUTTONS: Enables the radio button address selection section to appear on the report's dialog box at run time. This lets the user select to print no address, preferred bill or preferred mail, or a specific address on the labels.
- PRINT_BARCODE: Option to print the USPS barcode at the top of each label.

COMMITTEES - Exports

- PRINT_HEADER: Print a header record with the output field names at the top of the export file (standard for Microsoft Word merge files).
- PRINT_QUOTATIONS: Print quotations around each output field (for example, comma delimited output).
- EXPORT: Create the output as an export file.

DUES - Renewal Notices

- SUPPRESS_ZERO_ITEMS: Suppresses zero balance line items from printing on the renewal or reminder notice.
- PRINT_CHECKBOX: The option to print a checkbox next to the line item so the customer can indicate for which items he is submitting payment.
- PRINT_CARD: For iMIS Authorized forms only, this option will cause the credit card string to print in the credit card area on the form.

MEETING - Registrations

- PRINT_INCLUDE_CANCELLED: Option to print the cancelled registrants (those with a status that begins with C) as well as the active registrants.
- FORCE_MASTER: Forces the registrant to print even if he/she has not registered for any functions. (Does not apply to Crystal Reports.)
- REGISTRANT_TYPE: Permit dialog box selection by Registrant Class.
- FUNCTION_BUTTON: Permit dialog box selection of a specific function within an event.

MEETING - Badges

- PRINT_DESIGNATION: Option to print the designation in the registrant's full name that prints on the badge.
- PRINT_TITLE: Option to print the registrant's title on the badge.
- PRINT_COMPANY: Option to print the registrant's company name on the badge.

- NO_FULL_ADDRESS: Option to print the full address, including the street address, on the badge.
- PRINT_STATE: Option to print the state as well as the city on the badge. When this option is not enabled only the city prints.
- PRINT_ORG_NAME: Option to print the organization or association's name at the bottom of the badge.
- PRINT_REG_CLASS: Option to print the registrant class code in very small letters in the lower right corner of the badge. This encoding is intended to indicate which color-coded badge cover to use with the badge (for example, blue for customers, green for exhibitors).

MEETING - Confirmations

- MARK_CONFIRMED: This option marks the registration data with the date and time of the confirmation printing, thereby preventing the confirmation from being printed in future print runs.
- PRINT_REPRINT_ALL: Option to print all confirmations, including the registrations that have already been confirmed.
- PRINT_SHOW_DATE_RANGE: Option to print the date or date range of the overall event in the top portion of the confirmation.
- PRINT_DAY_FIRST: (Crystal Report Only): Option to print the formal event date in non-US, day month year format when PRINT_SHOW_DATE_RANGE is enabled. (for example, Wednesday, 09 February, 2000)
- PRINT_SHOW_FUNCTION_DATES: Option to print the date & time range of each function. If enabled, the date/time range appears in a separate line underneath the respective function.
- PRINT_HOTEL_LINE_ITEMS: (Applicable to sites licensed for Hotel Block Management): Option to print (PRINT_) or suppress (NO_) the zero balance hotel registration lines from the confirmation. If printed, the hotel registration lines will appear at the bottom of the function section.

- PRINT_NOTE: Option to print the Notes field from the individual registration in the bottom section of the confirmation.
- PRINT_ORG_LOGO: Option to print the Organization's Name & Letterhead Style Address at the top of the Confirmation.
- PRINT_MULTI_ENTITY: (Crystal Report Only) In a multiple entity situation, option to print the name and letterhead style address of the specific entity that owns the event at the top of the Confirmation.
- PRINT_CANDADIAN_INFO: (Crystal Report Only): Option to print the breakdown of PST, GST, and the GST Remit Number at the bottom of the notice. This information will print if the tax is non-zero and this option is enabled.

  MEETING - Invoices

- PRINT_REPRINT_ALL: Option to print all Invoices for selected event(s), even those that have been previously printed.
- INVOICE_REGISTRATION: This option will assign a sequential Invoice number and the appropriate Invoice date to each registration order for which an invoice has not already been printed.
- PRINT_ADDL_MEETING_INFO: Option to print the event title, date range and location immediately above the function details.

  MEETING - Rosters - Preregistration List and Formal Meeting Roster

- PRINT_FULL_ADDRESS: Print full address.
- PRINT_PHONE: Print phone number.
- PRINT_EMAIL (Crystal Only): Print e-mail address.
- PRINT_DESIGNATION: Print designation.

  MEETING - Tickets

- MARK_TICKET: Marks each ticket as being printed so that it will not be reprinted in future print runs unless reprinting is specifically requested.

- PRINT_ALL_TICKETS: Option to print all tickets for selected event(s), even those that have been previously printed.
- PRINT_MEETING_NAME: Option to print the event title on the ticket.
- PRINT_TICKET_NUM: Option that assigns a sequential number to tickets and prints the number on the ticket.
- PRINT_ORG_LOGO: Option to print the organization name on the ticket.

  ORDERS - Shipping Papers and Invoices

- PRINT_KIT_LINES: Option to print the individual kit components as well as the main kit product on the documents.

  To clone a report

  Any new report you create displays with the other Standard Reports on the Reports menu. Before you begin cloning reports, create or find out your organization's naming convention that distinguishes the cloned report from the original.

1. Select Utilities> Report Specs to display the Report Specifications window, which contains a list of all iMIS standard reports, sorted by module and type.

   Note: To access the Utilities> Report Specs option, you must have an authorization access code of eight (8) or higher.

2. Select a report to clone, and click Clone.
3. Change the System name if you cloned a report from another module.

   Note: If you clone a standard report and put a period (“.”) at the beginning of the name of the cloned report, such as .Badge, it becomes the default for that report type and places the report at the top of the Systems list.

4. Click Parameters and make the necessary changes. These changes may include changes to the Rpt File/Format, the Options list string, or a message text in the Parameters text field. When changing an option, remember that most of the report options are already in the Options list. To enable an option that is disabled, change the first word of

the option from NO to PRINT. For example, change NO_FULL_ADDRESS to PRINT_FULL_ADDRESS.

5. Click Save.

Hands-on exercise: Clone a report

In this exercise, you will create a new report by cloning it from an existing report.

1. Select Utilities> Report Specs to open the Report Specifications window.
2. Select the REFERRAL - Invoice - Print New Invoices report from the drop-down list.
3. Click Clone.
4. Change the name of the Title to Print New Invoices - 032604.
5. Click Save on the Report Specifications window to display the report you created with the other Standard Reports on the Reports menu.

Printing Bar Codes

The U.S. Postal Service (USPS) uses the POSTNET bar-coding scheme to sort letters at high speeds. The USPS high-speed scanners read the bar code during the sorting process.

iMIS allows you to pre-print the POSTNET bar codes on reports such as labels, badges, billing reminders, and accounts receivable notices so you can take full advantage of the large discounts offered by the USPS for mailings with pre-printed bar codes. Refer to the following example.

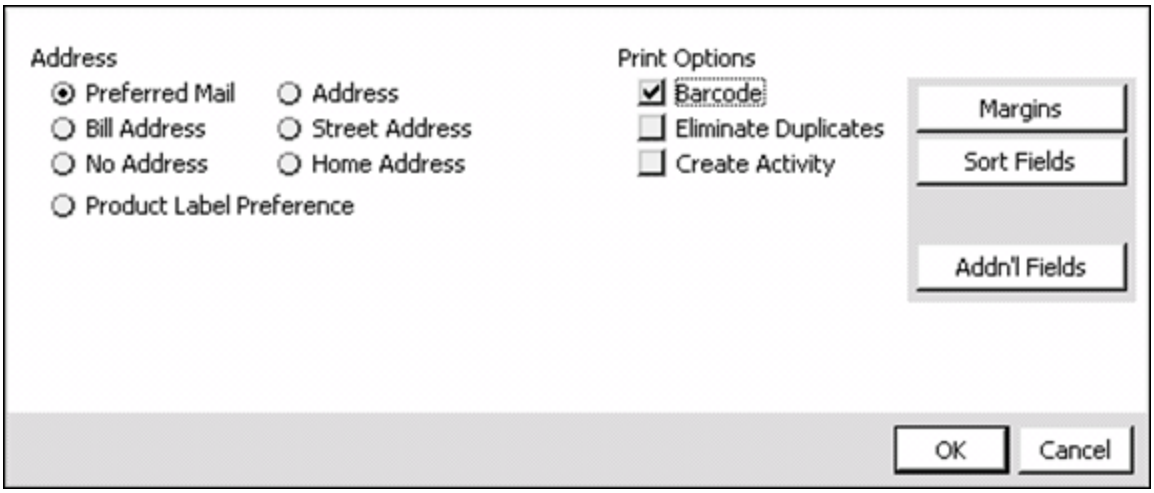
Current USPS regulations allow bar codes to be printed with the address, instead of requiring the bar code to be printed on the envelope. The iMIS bar code is compatible with both laser and dot-matrix printers.

Note: You must be licensed to use the iMIS postal bar code feature.

To include bar coding on a report

1. Include the ZIP code (ZIP + 4) in your iMIS customer records along with the address.

2. When you are generating a report that can use bar coding, such as most labels, you will see an option labeled Barcode on the bottom half of the Selections window under Print Options. Select the Barcode print option.
3. Click OK.



The bottom half of the Selections window.

Note: If Barcode does not appear under Print Options, it is not available for the current report.

When the bar codes print on the output, they automatically appear flush left above the mailing address and, by default, all of the output sorts by ZIP code.

Example of a properly aligned barcode.

If your bar code font appears wrong, check that the correct font is installed. Postal BarCode v.1.02 is located in a \FONTS directory in your \iMIS directory.

Note: To change the default setting for the Barcode option for a report you use frequently, change NO_BARCODE to PRINT_BARCODE (or the reverse) in the Report Specification Parameters field for that report format.

Exporting Report Data

You can export your iMIS data so that it can be read and used by outside applications, such as word processors, spreadsheets, and database packages. Most report windows throughout iMIS offer export formats for creating these files. Some formats automatically create files for popular word processing applications, filtering names, addresses, phone, date, and additional fields you specify. For these reports, you do not need to specify the export format because the format specifications are already built into the report.

To export a report to either MS Word or WordPerfect

1. From the reports window, select Exports from the Report Types list if this report type is available. A list of Available Reports displays in the area on the right.
2. Select a report from the Available Reports list.
3. (optional) Click Options and select Export Format to open the Export Format window.
4. Select a Format Type, enter a file name, and click OK.
5. Click Run.
6. Enter or select report information and click OK. The Set print file name window displays.
7. Enter the file name.
8. Click Save to save the exported data in a file report.

You can select from several other export formats for your report, such as spreadsheet, dBase, and so forth. Select the additional formats from the Export Format window.

To export a report in other formats

1. From the reports window, select Exports from the Report Types list if this report type is available. A list of Available Reports displays in the area on the right.
2. Select a report from the Available Reports list.
3. (optional) Click Options and select Export Format to display the Export Format window.
4. Choose one of the nine Format Type options to specify how iMIS should format the output file.
5. Enter the file name.
6. Click OK.
7. Click Run.
8. Enter or select report information and click OK.
9. The Set print file name window displays.
10. Enter the file name.
11. Click Save to save the exported data in a file report.

The QuickLetter System

To create a new letter template (QuickLetter)

1. From the reports window, select Letters from the Report Types list.
2. Select a letter from the list of Available Reports.
3. Click Options> Letter Text to open the Letter Text window.
4. Place your cursor in the Title field, and enter a title for your new letter template.
5. Place your cursor in the letter text area, and modify the letter template as necessary.
6. Click Save as Standard to open the Letter Name window.
7. Enter a name for your new letter template.

8. Click Save to save the letter template.
9. Click Close to close the Letter Text window.

To edit a letter template (QuickLetter)

If you modify a template that was previously used to create activity records and you create new activity records based on the modified template, the letter text in the new activity records will show the original letter text before it was modified. If you want the new activity records to reflect the new text, create a new template.

1. From the reports window, select Letters from the Report Types column.
2. Select a letter from the list of Available Reports.
3. Click Options> Letter Text to open the Letter Text window.
4. Modify the letter as necessary.
5. Click Save as Standard. The Letter Name window opens.
6. Click Save. A message prompts you to replace the current letter.
7. Click Yes.
8. Click Close to close the Letter Text window.

To add additional fields to a template (QuickLetter)

Additional fields can be added to templates created in QuickLetter.

1. Select Utilities> Report Specs to open the Report Specifications window.
2. Select a QuickLetter template to edit (e.g., MEMBERSHIP-Letters-Sample New Member Letter (QuickLetter)).
3. Click Parameters to open the Detail Report Parameters window. The template name you chose displays in the Rpt File / Format field, and the Report Type is shown as OMNIS.
4. Click Edit.
5. (optional) Enter the table name in the Main Tables field.

6. (optional) Enter the table name in the Search Files field.
7. Enter the field name in the Report Fields, for example, Orders.INFORMAL.

   Note: The table name is entered in upper/lower case while the field name is in all upper case.
8. Click Save.

   To mass merge a letter (QuickLetter)

1. From the reports window, select Letters from the Report Types column.
2. Select a letter from the Available Reports column.

   Note: Sample MS Word templates cannot be used with QuickLetter.
3. Click Run to open the Member/Contact Selections window.
4. Click OK on the Member/Contact Selections window. The template opens with the text displayed.

   To mass merge an e-mail (QuickLetter)

   To ensure all letters are delivered by e-mail, verify that the E-mail field is populated on the Manage customers window's Profile tab for each customer.

   Note: The subject line of e-mail letters created using QuickLetter defaults to "E-mail Letter." To modify the text that displays in the subject line of your e-mail letters, select Utilities> Report Specs, clone the report, click Parameters, modify the text that appears after "<Subject>" in the Parameters field, save your changes, close the Report Specifications window, and run the report.

1. Open your e-mail program.
2. From the reports window, select Letters from the Report Types window.
3. Select the e-mail to merge.
4. Click Run to open the Member/Contact Selections window.
5. Enable the specific Member/Nonmember options.

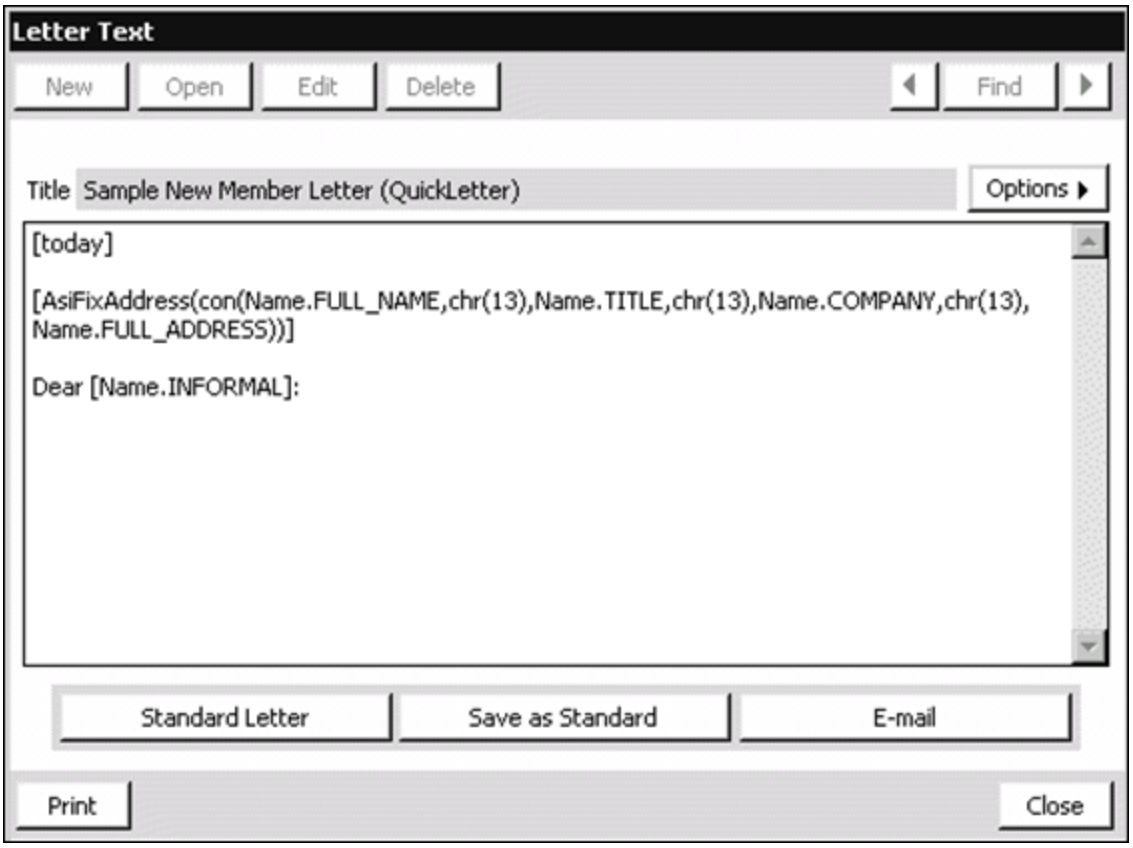
6. Click OK to send the e-mail. The View E-mail Results window displays.
7. Verify that the information is correct, and click Close.

To delete a letter (QuickLetter)

1. Select Utilities> Report Specs to open the Report Specifications window.
2. Highlight the letter you want to delete.
3. Click Delete.
4. A message displays asking you confirm the deletion. Click Yes.

Note: When a report specification is deleted on the Report Specifications window, the template will not appear in the Available Reports column on the Generate reports window.

Letter Text window



From the reports window, select Letters from the Report Types list, select a letter, and click Options > Letter Text

Title

Enter the name of the Standard Letter.

Options button

Opens a list of options for the selected letter:

Letter Format - Available letter formats. Corresponds to the six available letter report formats defined in the Report Specifications window.

Note: When you change the format for a letter, the selected format is written to the report description so that the next time the report is selected from the Letter Text window, the most recently selected format will be used.

Margins - Opens the Margins/Page Layout window that allows you to specify the layout settings for your letter.

Standard Letter button

Opens the Find window and select from the available letter reports.

Save as Standard button

Used to save a letter.

E-mail button

Used to send an e-mail directly to a customer (requires MAPI32-compliant e-mail application software and Internet access).

Print button

Used to generate a letter and send it to your report destination.

Standard Letters window

This window shows the list of Letter System templates that are available for a module, and provides options for managing the templates.

Note: The name of the window varies by module.

From the reports window, select Letters, and click Letter System

This window shows the following information for each template.

- Title - The iMIS database name of the template.
- Status - The status of the MS Word files associated with the template.
- OK - The template files are available in the template folder.
- Unavailable - The template files are not available in the template folder, or the folder is not available.
- Report file (.doc) - The unique portion of the names of the template files.

This window provides the following buttons.

- New - Creates a template that can use the iMIS fields that are currently available for a module.
- Edit - Opens the selected template with MS Word.
- Save As - Creates a template by copying the existing, selected template. The new template can use the fields that were available for the module when the existing template was

created.

- Setup - (if enabled) Opens the Setup Standard Letters window.
- Merge - Initiates the process of combining iMIS data with the selected template.

Setup Standard Letters window

This window defines the iMIS database fields that become columns in the data source table for this MS Word letter template, and the order in which the columns appear in the data source table.

Note: Your login must have authorization level 8 to use this window.

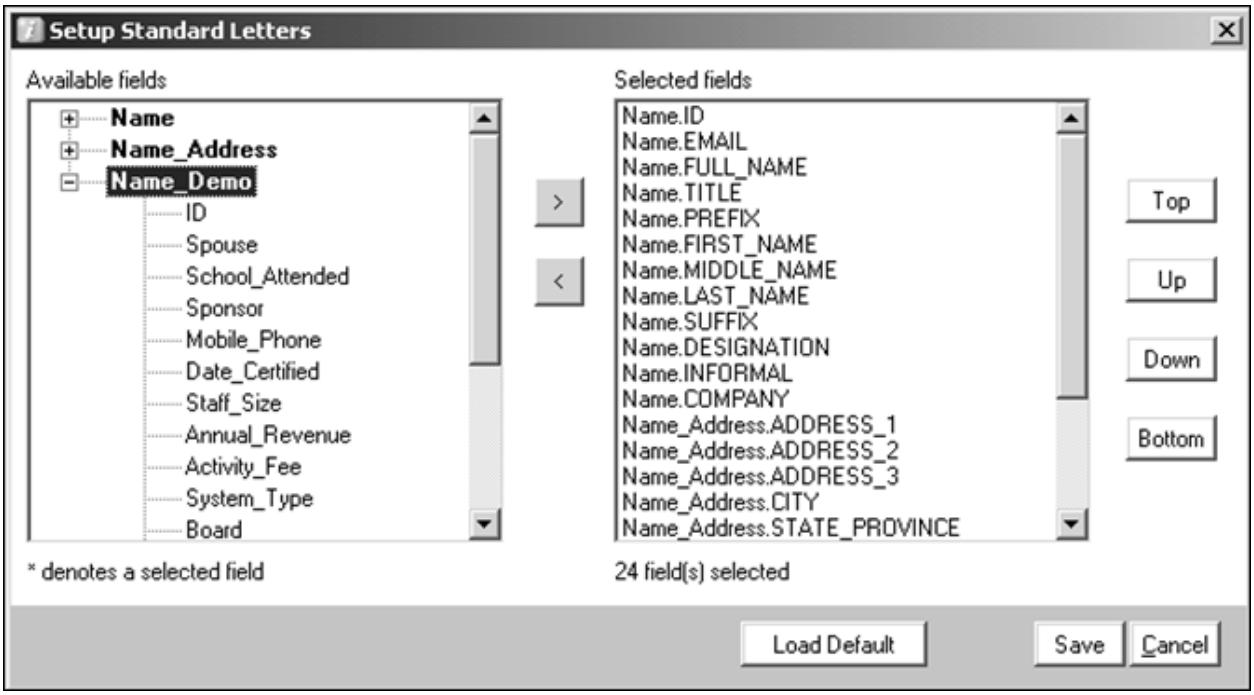


Figure 1: Setup Standard Letters

Setup Standard Letters window

Available fields

This area shows the iMIS tables and fields that are available for use as columns in the data source table for this letter.

To add a field to this letter's data source, select the field name, and then click >.

Note: Users with authorization level 8 can add fields from any iMIS table to the list of available fields, except fields that contain image data.

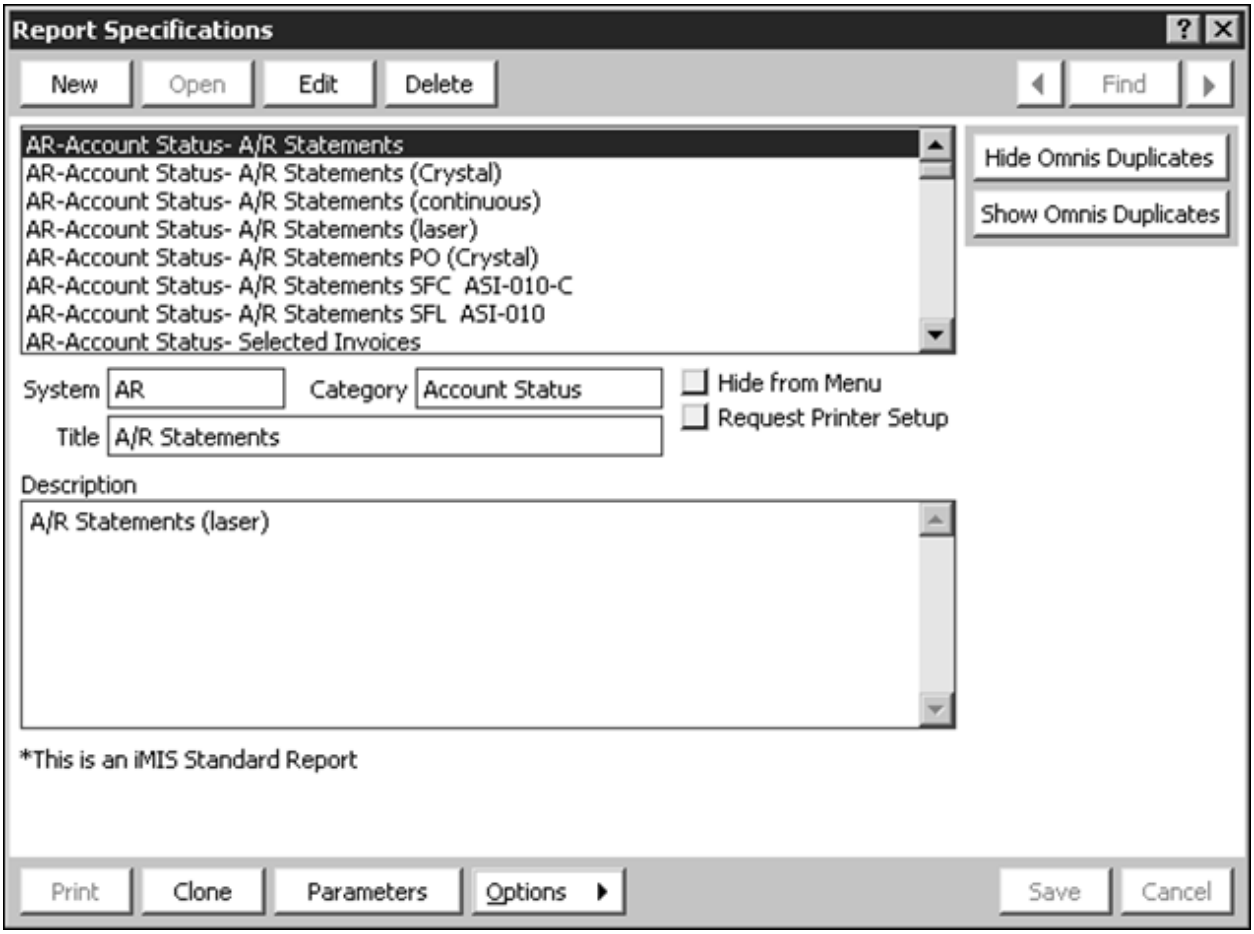
Selected fields

This area shows the iMIS fields that become columns in the data source table for this letter.

To remove a field from this letter's data source table, select the field name, and then click <.

- Top - Moves the selected field to the beginning of the list.
- Up - Moves the selected field one entry towards the beginning of the list.
- Down - Moves the selected field one entry towards the end of the list.
- Bottom - Moves the selected field to the end of the list.
- Load Default - Populates the list with the fields defined by ASI for this letter's iMIS module.

Report Specifications window



From the menu bar, select Utilities > Report Specs

Report scrolling area

This area contains a list of all iMIS reports.

Hide Omnis Duplicates button

Used to display Crystal-type reports for the specified System in the report scrolling area and hide the same reports that were created using Omnis.

Show Omnis Duplicates button

Used to display Crystal and Omnis report types for the specified System in the report scrolling area.

System

This field indicates where the report resides in the iMIS module, for example, Expo.

Category

This field indicates the report group/type, for example, Product.

Title

Displays the name of the report in this window and in the Generate reports window.

Hide from Menu

Enable to hide the report title on the Generate reports window.

Request Printer Setup

Enable for the system to automatically display a Set Report Destination window.

Description

This field contains a detailed description of the report.

Print button

Used to generate and send the selected report to your report destination.

Clone button

Used to produce an exact copy of the selected report.

Parameters button

Used to display the Detail Report Parameters window, where you can specify additional report specifications.

Options button

Used to display a drop-down list of report options available for printing, exporting, saving, and sorting the selected report format. Report options vary by report type.

Run-time report selection windows

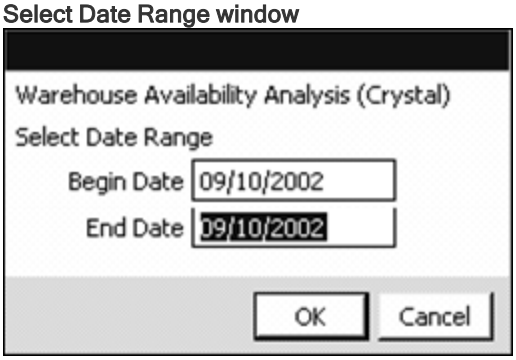
A run time window is a secondary selection window that allows you to specify the date range and data to be included in your output results. Only open items with a Bill Date or

Run Date within the specified date range will print. Run time windows display when you click Run on the Generate reports window (from Billing, select Generate reports).

The window that displays depends on the search parameters entered for the selected report in the SearchDialog field on the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters):

- If DateRangeDia or CRTransDia is entered in the SearchDialog field, then the Select Date Range window displays when you click Run on the Generate reports window.
- If DuesPrintDia is entered in the SearchDialog field, then the Select Member Type window displays when you click Run on the Generate reports window. The DuesPrintDia parameter generally is used when generating Renewal Notices.

Select Date Range window



An example of a Select Date Range run time window from the Orders module

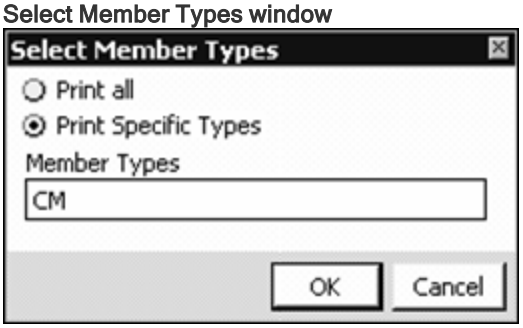
Begin Date

Specifies the beginning date of the reporting period.

End Date

Specifies the ending date of the reporting period.

Select Member Types window



An example of the Select Member Types window

Print all

Enable to print all of the customer types.

Print Specific Types

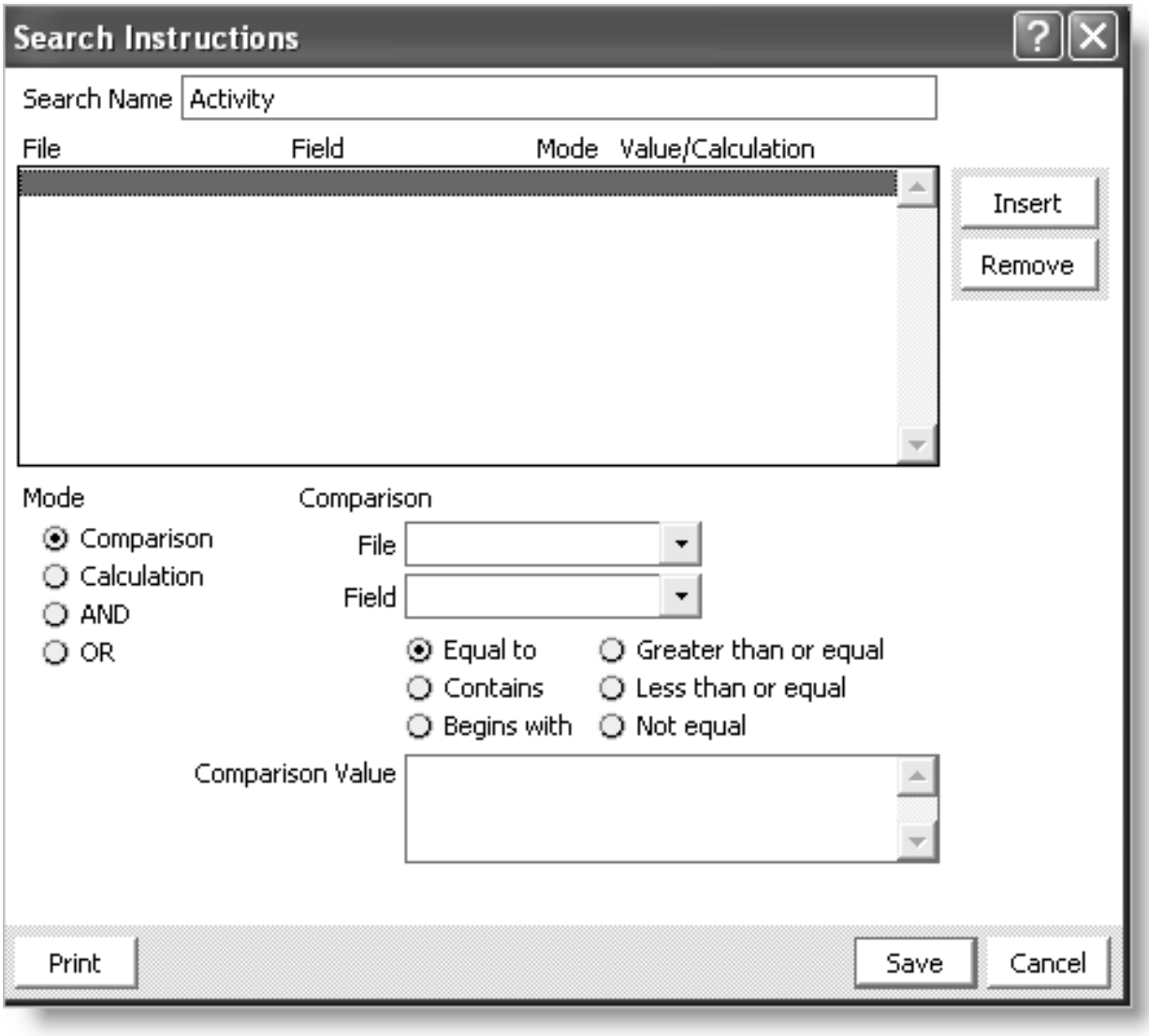
Enable to print specific customer types.

Member Types

(Displays when Print Specific Types is enabled) Specifies the specific customer types you want to print on your report.

Note: Set your Report Destination to Screen, and then enable all printing options you would like to try. Selectively disable the options, and observe their effect until you achieve the output you want to print.

Search Instructions window



From the Select Search Instructions window, select an existing search instruction, and click Edit

When you select the New, Clone, or Edit button, the Search Instructions window displays. In the Search Name field, you enter the name for the search instruction set. In the scrolling list, you can view the individual lines that make up the search instruction. In the Comparison Value field, you enter data to define those individual lines.

Search Name

Enter a unique name for search instructions so that they can be retrieved at a later date.

Search Instruction scrolling area

This section contains a list of the search instructions for the specified Search Name.

Insert button

Used to enter a new instruction.

Remove button

Used to delete an instruction.

Mode selection options

The mode specifies the calculation you will be performing for your search criteria. The following options can be specified:

Comparison - Compares a specified field to a given value. For example, you can specify that a field value equal the given value, be greater than, less than, and so forth. Comparison is the most commonly used string.

The fields in the Comparison area include the following:

- File - Name of the file (table) that contains the field you are comparing. Comparison lines only.
- Field - Name of the data field whose contents or value is being searched for the comparison. Comparison lines only.
- Equal to - (Default) Dictates that the field value must precisely match the value (or one of multiple values) specified in the Comparison Value field.

  Note: For an Equal to comparison, you can enter multiple values separated by commas (no spaces) in the Comparison Value field. With multiple values, a record passes the comparison test if the field data matches any one of the comparison values (iMIS assumes a logical OR).
- Contains - Similar to Equal To, but instead of requiring an exact match of the entire field value, it requires that a continuous character string anywhere in the field match the comparison value. This option is typically used to find values in a list string field.

- Begins with - Looks for a continuous character string at the beginning of the field contents. It tries to match that string with the comparison value. For example, use Begins with to search for records whose last names begin with “W.”
- Greater than or equal - Requires that the field value be greater than or equal to the comparison value. This type is used as one side of a two-part specification for a range of values. A typical use is for date fields.
- Less than or equal - Requires that a field's value be less than or equal to comparison value. This type also serves as the second half of a range specification. A typical use is for date fields.
- Not equal - Searches for records in which the contents of the named field do not match the specified comparison value (or any of the multiple values, separated by commas).

  Note: For a Not equal comparison, you can enter multiple values if you separate them with commas (no spaces). With multiple values, a record passes the comparison test only if the field's data does not match any of the values (iMIS assumes AND).
- Comparison Value - For Comparison lines, this text box contains the value or character string you are comparing to the field contents. For Calculation lines, this area contains the full formula for the True/False evaluation.

  Calculation - Allows you to enter a formula to compute. The calculation results are a true or false condition. A true condition result includes the record in the search results.

  AND - Use between two search lines to require a record to pass both conditions before it is included in your search results. By default, AND is assumed between adjoining lines, except when the same field is specified in adjoining comparison lines and the mode is Equal to, Begins with, or Contains. In this case, OR is assumed.

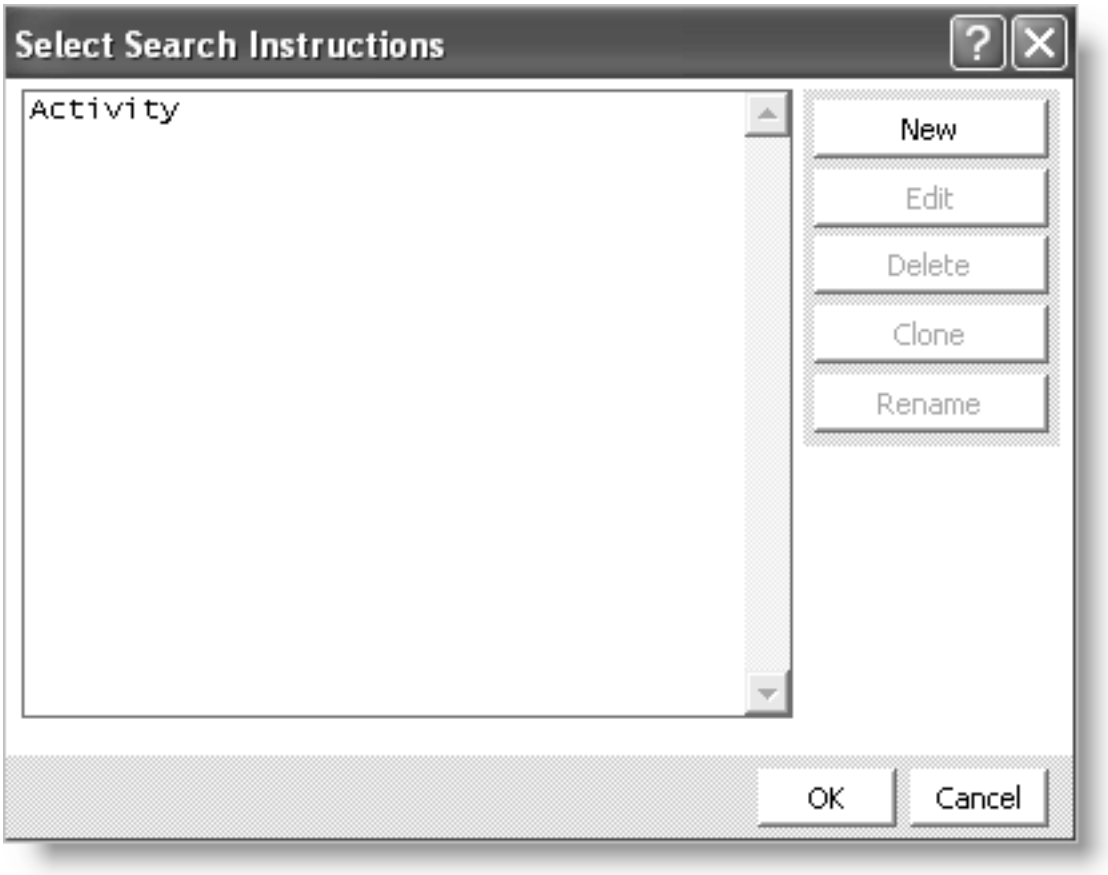
  OR - Use between two search lines to require a record to pass only one of the two conditions. OR must be entered to specify anything other than AND. The exception is when the same field is specified in adjoining comparison lines and the mode is Equal to, Begins with, or Contains. In this case, OR is assumed.

Note: When you are entering a character string, you must enclose the string in single quotes.

Print button

Used to generate and send a search instruction report to your report destination.

Select Search Instructions window



From the module that you're in, select Generate Reports, select a report type from the Report Types list, select a report from the Available Reports list, and select Search Format from the Options drop-down list

When you first request an ad hoc search, an initial Select Search Instructions window displays. This window lists the titles of any preexisting search instructions.

Note: iMIS only displays the search definitions that relate to the active module or task list item.

The following command options display on the Select Search Instructions window:

Search instructions scrolling list

This list displays the current search instructions.

Clone button

Used to create a new set of instructions based on an existing set.

Rename button

Used to change the name of a search definition.

Advanced Reporting

Managing Crystal Reports in iMIS

Section Goal

The goal of this section is to give you an understanding of how to incorporate Crystal reports into iMIS.

After completing this section, you will be able to do the following:

1. Add a custom Crystal report to the iMIS menu.
2. Clone an ASI standard Crystal report specification.
3. Use the Crystal Print Manager.
4. Add security to your reports.

Adding Crystal reports to the menu

You can insert new Crystal reports or clone existing ASI standard Crystal reports so that the customized reports can be accessed from the iMIS Reports menu.

When you insert reports into the iMIS Reports menu, it is important to determine where the report is stored. If you enter a report name with no path shown, iMIS assumes the report is stored in the stdrpts folder or the custrpts folder. iMIS will look for the stdrpts folder or the custrpts folder in either:

- Your local workstation, if the iMIS libraries were installed locally
- A server, if the iMIS libraries were installed on a server

Note: Make sure to place custom or cloned reports in the custrpts folder. Make sure to rename cloned reports. The iMIS standard reports are kept in the stdrpts folder and are overwritten during an install or upgrade.

To clone an ASI standard Crystal report

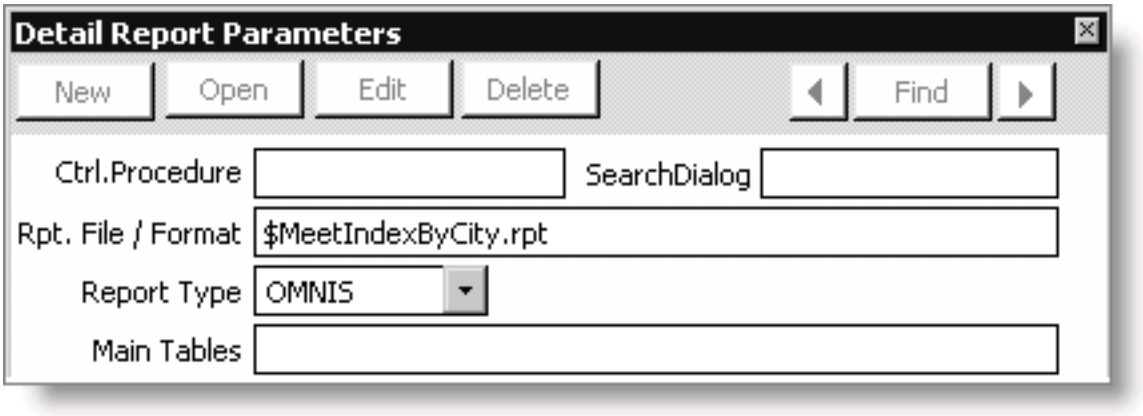
Note: Make sure to place custom or cloned reports in the custrpts folder. Make sure to rename cloned reports. The iMIS standard reports are kept in the stdrpts folder and are overwritten during an install or upgrade.

Cloning allows you to copy the specifications from an existing report and modify the cloned version. Cloning saves time compared to creating a new report from scratch.

1. Copy the ASI Crystal report to the custrpts directory, and rename the report.
2. Select Utilities> Report Specs to open the Report Specifications window, which contains a list of all standard reports sorted by module (System) and type (Category).
3. Highlight the report to be cloned, and click Clone at the bottom of the window.
4. Enter the System and Category in which you want the report to appear, or leave the report in the same module and as the same report type.
5. Enter a name for the cloned report in the Title field. If you are creating a Crystal report based on a cloned Omnis report, add “Crystal” in parentheses (Crystal). Adding “Crystal” to the report name helps to identify the Crystal reports.
6. Enter a Description for the cloned report.
7. Click Parameters to open the Detail Report Parameters window.
8. Delete the displayed Ctrl Procedure.

   Note: Prompts for search parameters will no longer be passed through iMIS if they were set up in the Crystal report unless the report file name is preceded by a “$.” Otherwise, all search parameters must be set in iMIS.
9. To use Crystal parameters (or to prompt for values):

- Tab to the Rpt File / Format field.
- Enter the report name preceded by the $ sign ($ReportName).

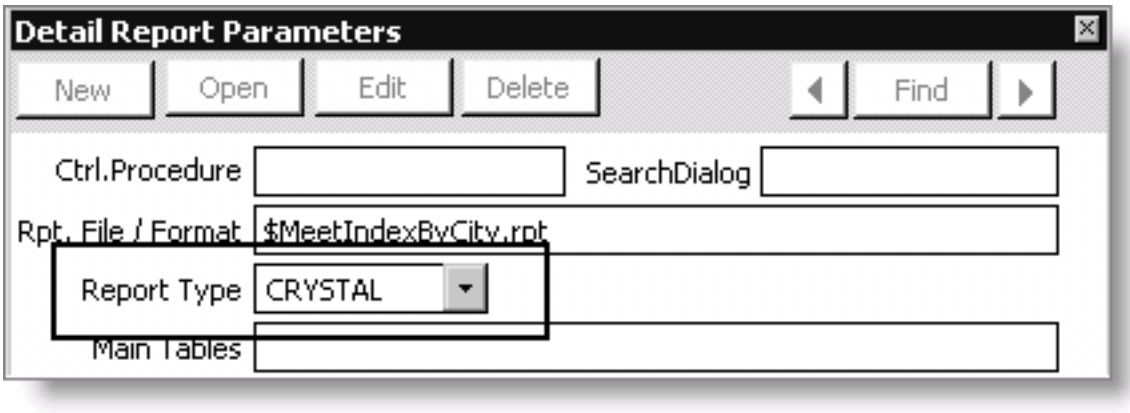


- Click Save on the Detail Report Parameters window to save the report specifications.

10. To map Crystal parameters to iMIS variables:

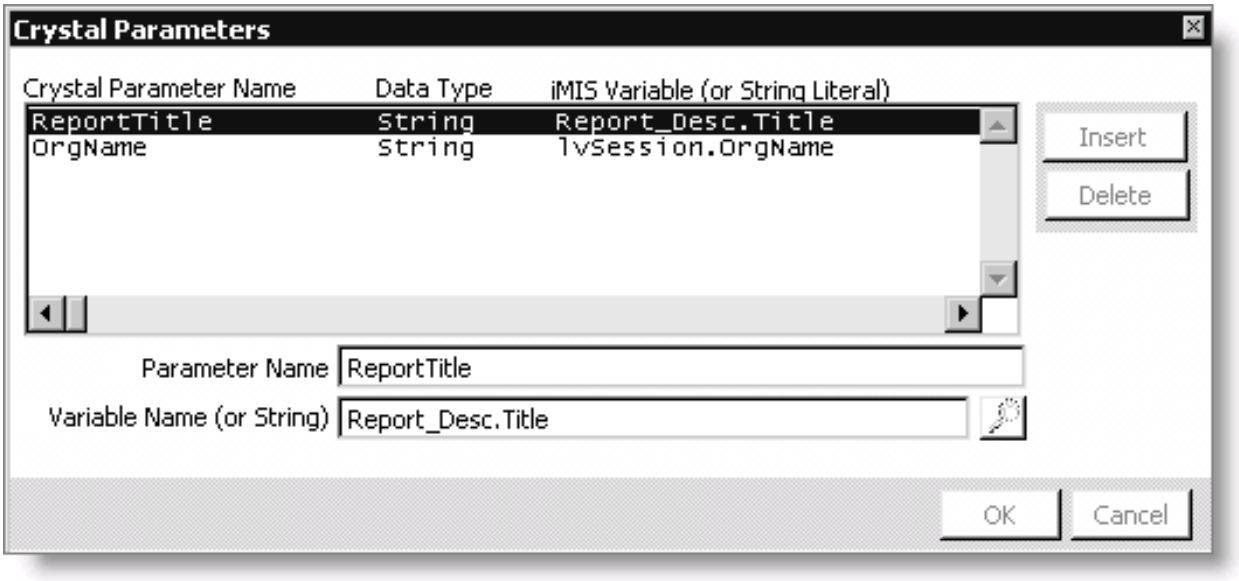
- Enter the report name in the Rpt File / Format field. The Crystal report should have an .rpt extension.
- Enter the complete directory path if the report does not reside in the stdrpts or custrpts folder.

  Optionally, you can press Ctrl+L to browse to the report directory and select the file. This lookup option is available only when a CRYSTAL report type is selected. The report name displays without the directory path shown.
- Click the Report Type drop-down list, and select CRYSTAL. The Report Type names the tool in which the report was developed. The tools currently supported are the Omnis Report Writer and the Crystal Report Writer.



- If you have set parameters in the Crystal report:
- Click Crystal Params to open the Crystal Parameters window.

  The Crystal Parameters window allows you to map Crystal parameters to iMIS variables or to a string literal. You must map Crystal parameters to a corresponding iMIS variable for the data to pass into iMIS and to display in the report.



- Click OK to save the parameters and return to the Detail Report Parameters window.
- Click Save on the Detail Report Parameters window to save the report specifications.

  To convert an older Crystal report

  Convert older Crystal reports so they can use Crystal report functionality.

1. Prompts for search parameters will no longer be passed through to iMIS if they were set up in the Crystal report. All search parameters should be set up in iMIS.
2. In iMIS, select Utilities> Report Specs.
3. Select the report, and click Edit.
4. Click Parameters to open the Detail Report Parameters window.
5. Remove the $ character from the report file name.
6. Click the Report Type drop-down menu, and select CRYSTAL.
7. If the following parameters are used in the Crystal report, click Crystal Params, click Insert on the Crystal Parameters window, and map the parameters to an iMIS variable. Click OK to save the parameters and return to the Detail Report Parameters window.

- If the OrgCode or OrgName parameters are used, map OrgCode to the iMIS lvSession.OrgCode variable, and map OrgName to the iMIS lvSession.OrgName variable.
- If the report uses the automatic Report Title Set feature, create a new Crystal parameter (for example, ReportTitle), place the parameter in the report layout, and map the Crystal parameter to the iMIS Report_Desc.Title variable.
- If a formula was entered in the Parameters field on the Detail Report Parameters window, the formula must be migrated to Crystal using the Crystal formula editor. If the formula used a runtime iMIS variable value, the iMIS variable value must be passed in as a parameter.

8. Enable the Save Report option to store the Crystal report in the Print Manager so that it can be accessed or printed later.
9. When the Save Report option is enabled, the For __ Days field displays with the default number of days that was set on the System Setup window (File> System Setup). This is the number of days the report will be stored and displayed on the Print Manager window. Override the default days, if necessary.
10. Tab to the Parameters field. You can enter overlay text or a Message parameter. In gen-

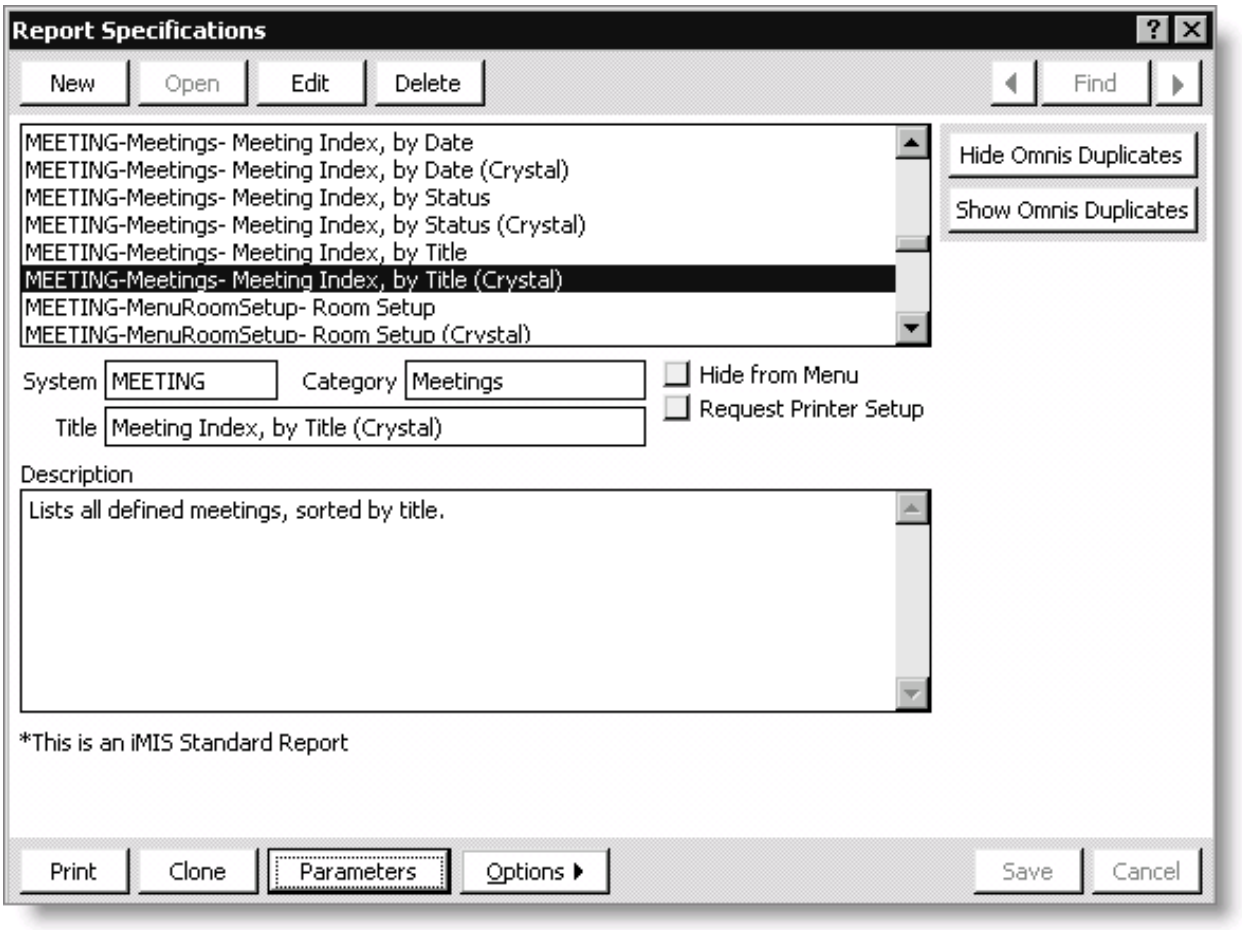
eral, parameters to be passed to Crystal reports must be specified on the Crystal Parameters window.

- If a message parameter is used, a Message formula in the Crystal report must be created and placed into the report layout appropriately.
- If the report uses OrgCode or OrgName, click Crystal Params, map OrgCode to the iMIS lvSession.OrgCode variable, and map OrgName to the iMIS lvSession.OrgName variable.

11. Click OK.

To add custom Crystal reports to the menu

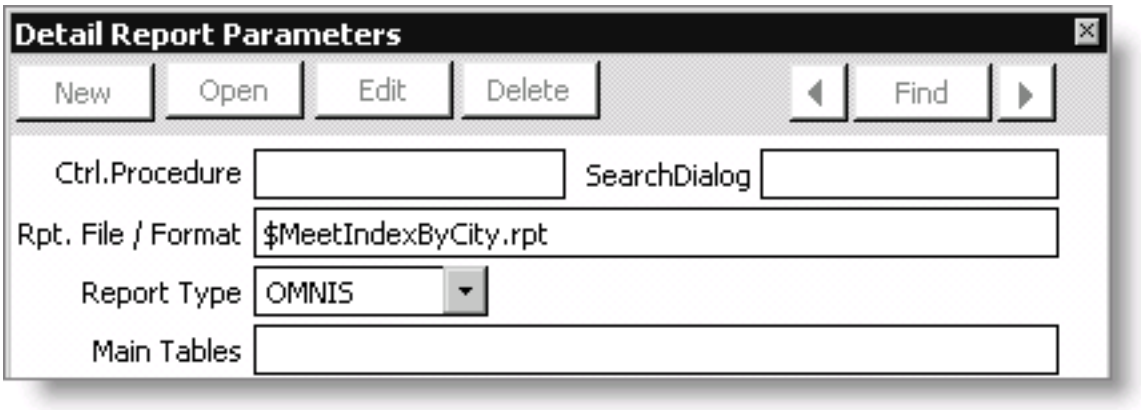
1. Create the Crystal report.
2. (optional) Copy the Crystal report to the custrpts subdirectory.
3. Select Utilities> Report Specs to open the Report Specifications window, which contains a list of all standard reports sorted by module (System) and type (Category).



4. Click New.
5. Enter the name of the system module in which the report is to appear. For example, if the report is based on the Events module, enter EVENTS in the System field.
6. Enter the category in which you want the report to display on the module-specific Reports window. The category displays as Report Types on the module-specific Reports window. For example, if the report appears in the Events module, you could enter Badges in the Category field.
7. Enter a descriptive Title for the new report followed by “Crystal” in parentheses (Crystal). Adding “Crystal” to the report name helps to identify the Crystal reports.
8. Enter a Description of the report.
9. Click Parameters to open the Detail Report Parameters window.

Note: Prompts for search parameters will no longer be passed through iMIS if they were set up in the Crystal report unless the report file name is preceded by a “$.” Otherwise, all search parameters must be set in iMIS.

- To use Crystal parameters (or to prompt for values):
- Tab to the Rpt File / Format field.
- Enter the report name preceded by the $ sign ($ReportName).

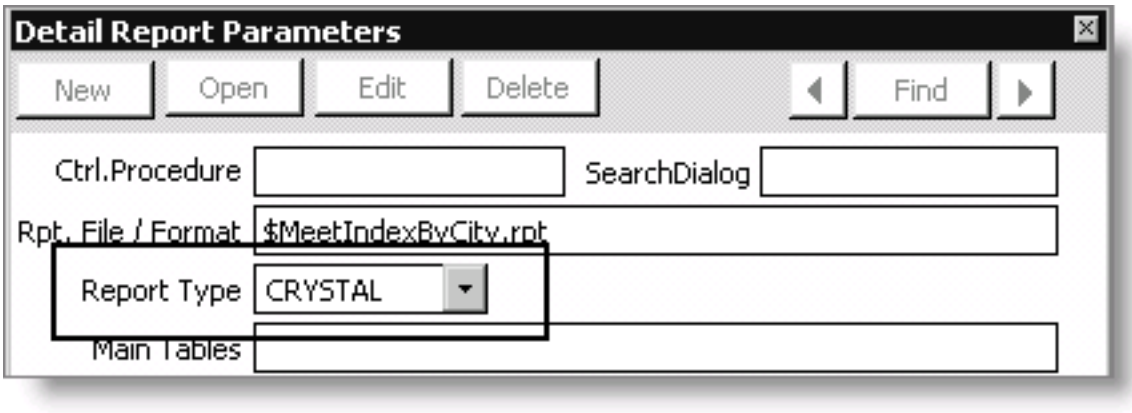


- Click Save on the Detail Report Parameters window.
- To map Crystal parameters to iMIS variables:
- Enter the report name in the Rpt File / Format field. The Crystal report should have an .rpt extension.
- Enter the complete directory path if the report does not reside in the stdrpts or custrpts folder.

  Optionally, you can press Ctrl+L to browse to the report directory and select the file. This lookup option is available only when a CRYSTAL report type is selected. The report name displays without the directory path.
- Select the Report Type drop-down list.

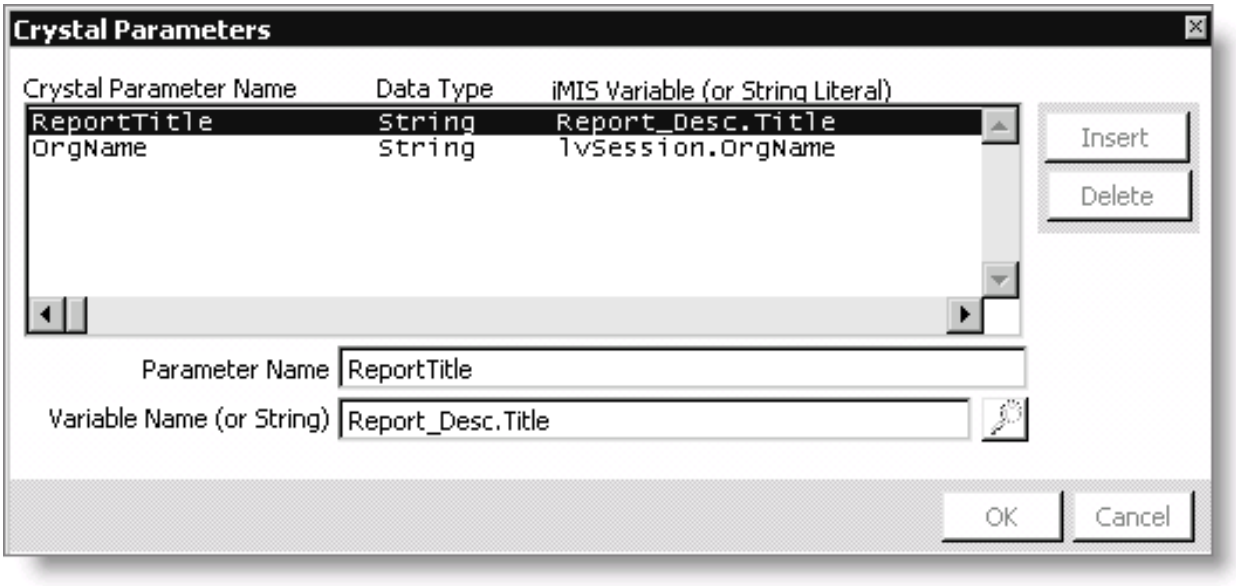
  Select CRYSTAL, the Report Type names the tool in which the report was developed.

  The tools currently supported are the Omnis Report Writer and the Crystal Report Writer.



- If you have set parameters in the Crystal report, click Crystal Params to open the Crystal Parameters window.

  The Crystal Parameters window allows you to map Crystal parameters to iMIS variables or to a string literal. You must map Crystal parameters to a corresponding iMIS variable for the data to pass into iMIS and to display in the report.



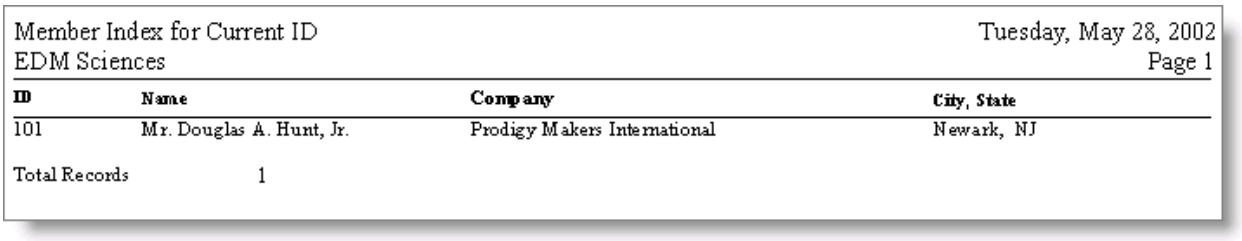
- Click OK to save the parameters and return to the Detail Report Parameters window.
- Click Save on the Detail Report Parameters window to save the report specifications.

  Hands-on exercise: Clone a Crystal report

In this exercise, you will clone the Member Index report and modify it so the report prints the Member Index information for the displayed customer's record.

1. Copy the MemberIndex.rpt file from the iMIS stdrpts directory to the \...\custrpts directory.
2. Open the \...\custrpts\MemberIndex.rpt in Crystal.
3. Rename the report as MemberIndexforCurrentID.
4. Select the Field Explorer icon.
5. Select the Parameter tab.
6. Click New to open the Create Parameter Field window.
7. Enter CurrentID in the Name field, and click OK.
8. Close the Field Explorer window.
9. Select the Select Expert icon.
10. Select Name.ID, and click OK.
11. Select the drop-down list, and select is equal to.
12. Select the second drop-down list, select the {?CurrentID} parameter, and click OK.
13. Open iMIS.
14. Select Utilities> Report Specs to open the Report Specifications window.
15. Scroll down, and select the Membership-Rosters-Member Index (Crystal) report.
16. Click Clone.
17. Enter Member Index for Current ID (Crystal) as the report Title.
18. Click Parameters to open the Detail Report Parameters window.
19. Tab to the Rpt File / Format field, and press Ctrl+L.
20. Navigate to the \imis\custrpts directory, select the MemberIndexforCurrentID.rpt file, and click OK.

21. Click Crystal Params to open the Crystal Parameters window.
22. Click Insert.
23. Enter CurrentID in the Parameter Name field, and press Tab.
24. Enter lvSession.CurrentId in the Variable Name (or String) field, and press Tab. Click OK.
25. Click Save on the Detail Report Parameters window to save the report changes.
26. Close the Detail Report Parameters window and the Report Specifications window.
27. Select Customers> Manage customers to open the Manage customers window.
28. Click Find to open the Search window.
29. Select ID from the drop-down list, enter 101 as the customer Id, and click Go.
30. Select Customers> Generate reports to open the Generate reports window.
31. Click Set Report Destination, and choose to print the report to Screen.
32. Select the Rosters report type, and then select the Member Index for Current ID (Crystal) report.
33. Click Run to open the Member/Contact Selections window.
34. Click OK. The report displays the information for customer 101.



Member Index for Current ID — Tuesday, May 28, 2002
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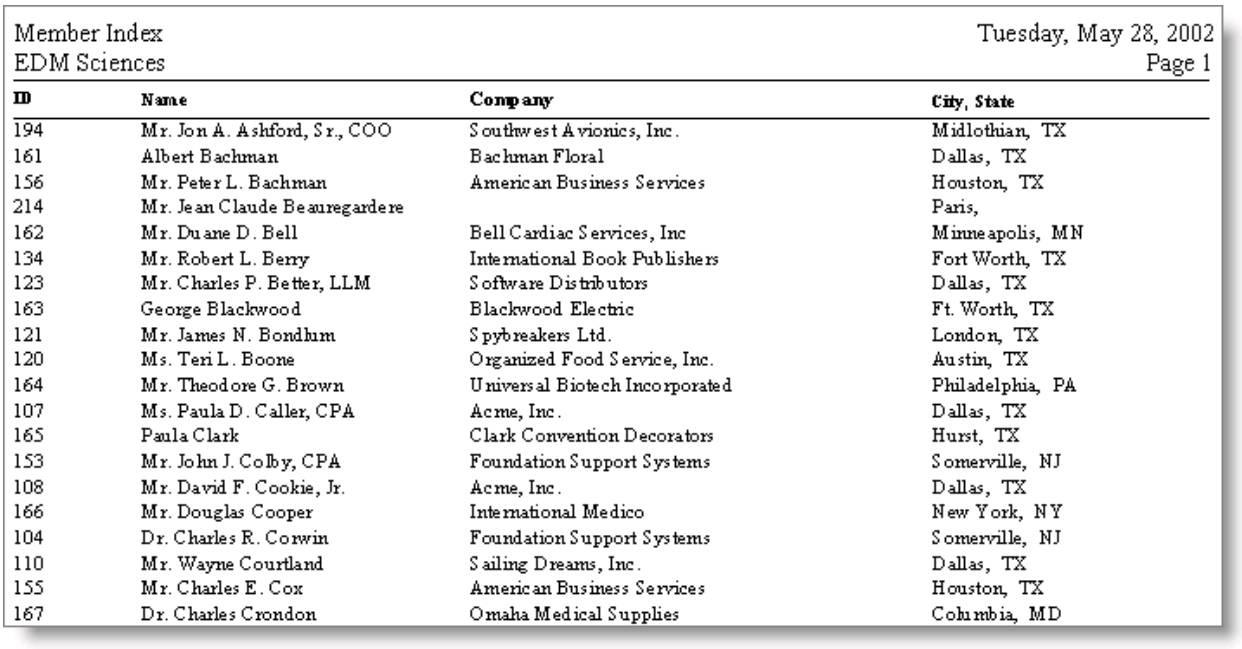
ID	Name	Company	City, State
101	Mr. Douglas A. Hunt, Jr.	Prodigy Makers International	Newark, NJ

Total Records 1

35. Run the original report, Member Index (Crystal), to compare the original report to the modified report. Notice the original report shows the address for each customer selected while the report we modified only shows the address for the customer's record we have displayed.



Member Index
EDM Sciences

Tuesday, May 28, 2002
Page 1

ID	Name	Company	City, State
194	Mr. Jon A. Ashford, Sr., COO	Southwest Avionics, Inc.	Midlothian, TX
161	Albert Bachman	Bachman Floral	Dallas, TX
156	Mr. Peter L. Bachman	American Business Services	Houston, TX
214	Mr. Jean Claude Beauregardere		Paris,
162	Mr. Duane D. Bell	Bell Cardiac Services, Inc	Minneapolis, MN
134	Mr. Robert L. Berry	International Book Publishers	Fort Worth, TX
123	Mr. Charles P. Better, LLM	Software Distributors	Dallas, TX
163	George Blackwood	Blackwood Electric	Ft. Worth, TX
121	Mr. James N. Bondhum	Spybreakers Ltd.	London, TX
120	Ms. Teri L. Boone	Organized Food Service, Inc.	Austin, TX
164	Mr. Theodore G. Brown	Universal Biotech Incorporated	Philadelphia, PA
107	Ms. Paula D. Caller, CPA	Acme, Inc.	Dallas, TX
165	Paula Clark	Clark Convention Decorators	Hurst, TX
153	Mr. John J. Colby, CPA	Foundation Support Systems	Somerville, NJ
108	Mr. David F. Cookie, Jr.	Acme, Inc.	Dallas, TX
166	Mr. Douglas Cooper	International Medico	New York, NY
104	Dr. Charles R. Corwin	Foundation Support Systems	Somerville, NJ
110	Mr. Wayne Courtland	Sailing Dreams, Inc.	Dallas, TX
155	Mr. Charles E. Cox	American Business Services	Houston, TX
167	Dr. Charles Crondon	Omaha Medical Supplies	Columbia, MD

Using the Crystal Print Manager

The Print Manager allows you to save a report for a specified period and to reprint the stored report.

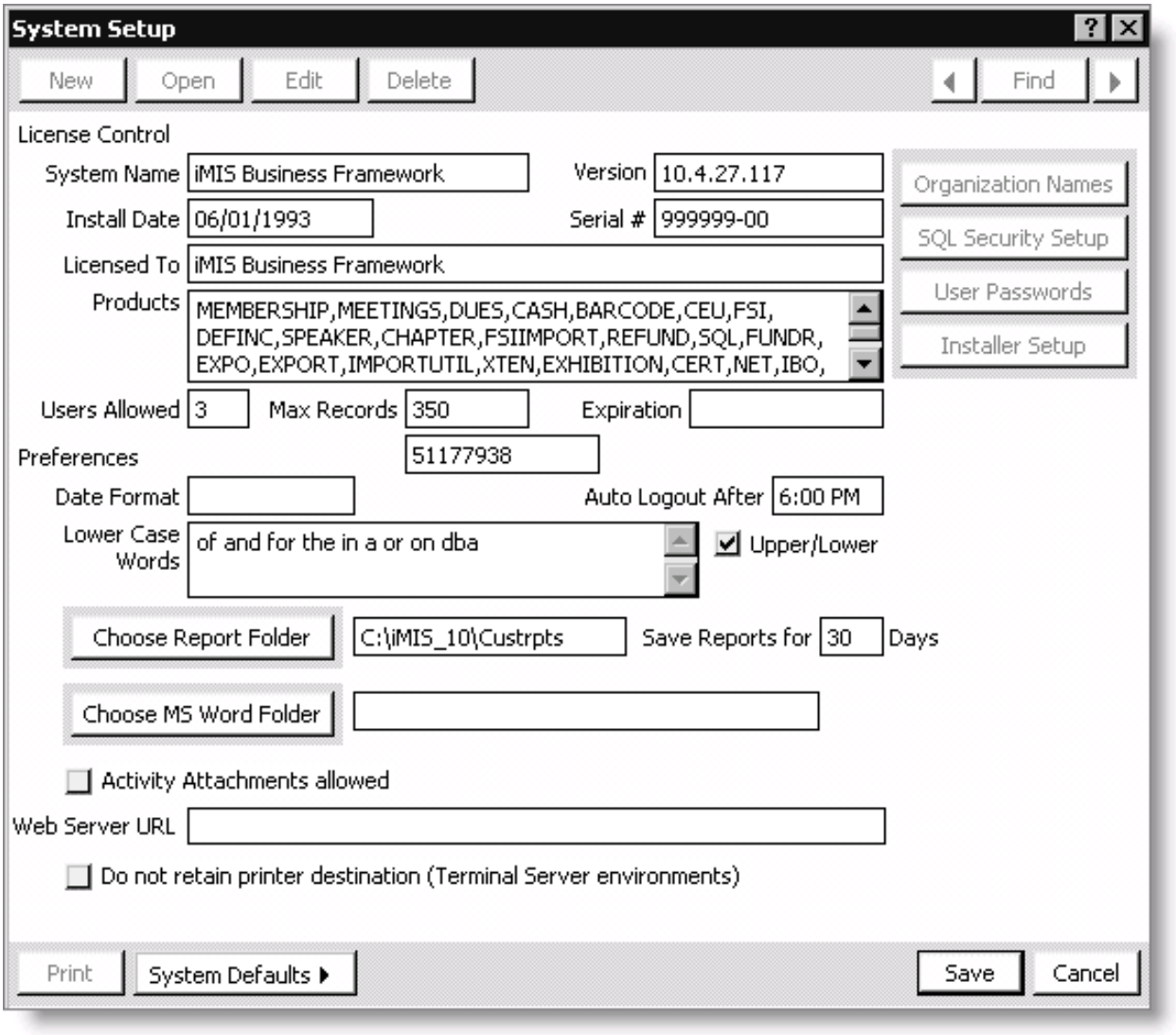
To set the Print Manager system defaults

On the System Setup window, specify the location and default number of days for storing the report.

1. Open iMIS.
2. Select File> System Setup to open the System Setup window.
3. Click Edit.
4. Click Choose Report Directory to open the Browse for Folder window.

   Note: Select a network drive that is mapped on all iMIS clients. If a local drive is selected, users on the network are not able to print the reports from the Print Manager.
5. Select the directory where the report will be stored, and click OK.
6. In the Save Reports for _ Days field, enter the default number of days to store the reports.

If a different period is set on the Detail Report Parameters window for the report, the days set for the report override the System Setup.



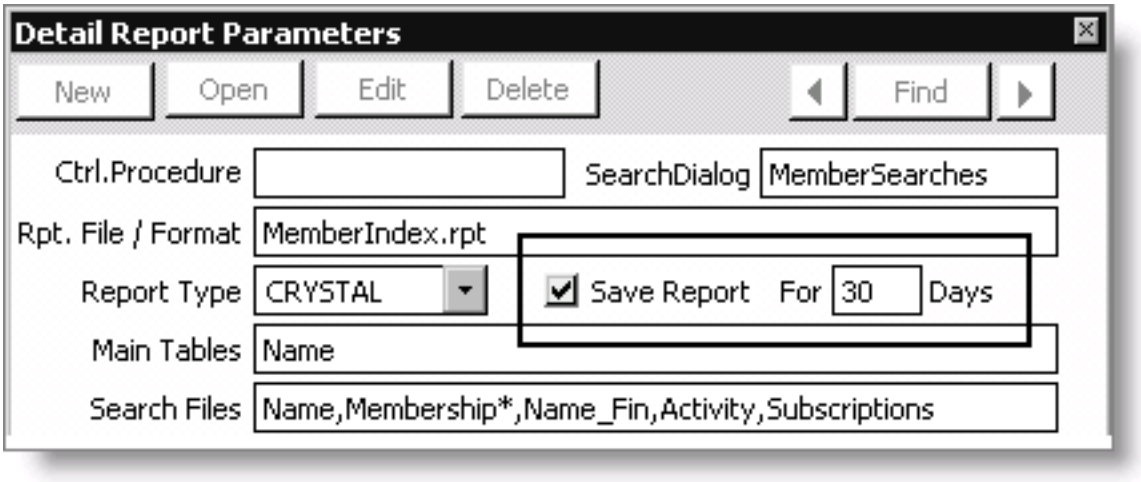
7. Click Save.

To save a Crystal report

To save a report to the Print Manager to be accessed or printed later, you must enable the Save Report option on the Detail Report Parameters window.

1. Open iMIS.

2. Select Utilities> Report Specs to open the Report Specifications window.
3. Select the Crystal report.
4. Click Edit.
5. Click Parameters to open the Detail Report Parameters window.
6. Enable the Save Report option. When this option is enabled, a new field displays.
7. When the Save Report option is enabled, the For __ Days field displays with the default number of days that was set on the System Setup window (select File> System Setup). This is the number of days the report will be stored and displayed in the Print Manager window. Override the default days if necessary.



8. Click Save.

Hands-on exercise: Set the number of days to save a report

In this exercise, you will set the number of days to save the Member Index report in the Print Manager.

1. Open iMIS.
2. Select Utilities> Report Specs to open the Report Specifications window.
3. Select MEMBERSHIP-Rosters-Member Index (Crystal).
4. Click Edit.

5. Click Parameters to open the Detail Report Parameters window.
6. Enable the Save Report option. When this option is enabled, a new field displays.
7. Enter 30 as the number of days for the Print Manager to store the report.
8. Click Save, and close the Detail Report Parameters window.

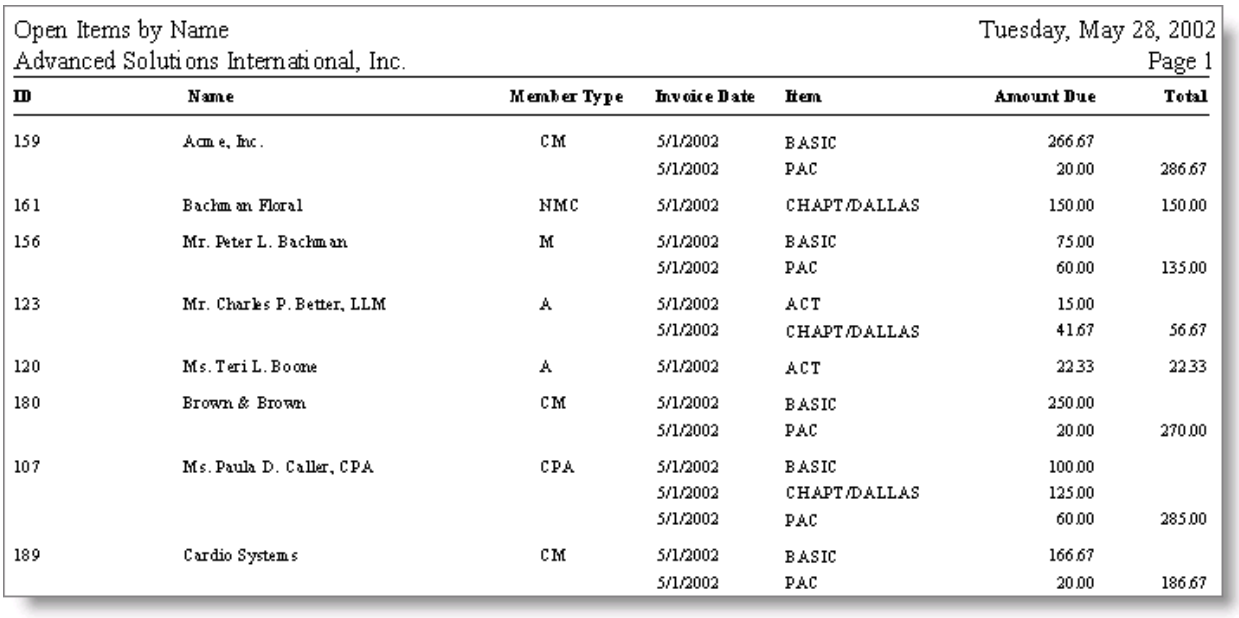
To run a saved Crystal report

When you run a Crystal report with the Save Report option enabled, the report displays on the Crystal Preview window, and the data is exported and stored to a file labeled asi#.rpt. The location of the stored report file (asi#.rpt) is designated on the System Setup window (select File> System Setup). All stored reports are kept in the Job_Record table.

1. Open iMIS.
2. Select the report. For this example, we selected Billing> Generate reports to open the Generate reports window. We then selected the Open Invoices report type, and selected Open Items by Name (Crystal) from the Available Reports area.
3. Click Set Report Destination, select the appropriate destination, and click OK.
4. Click Run.
5. Select a date range.

The Crystal Preview window opens with the data displayed. While the data is exported to the asi#.rpt file, the system displays an Exporting Records window.

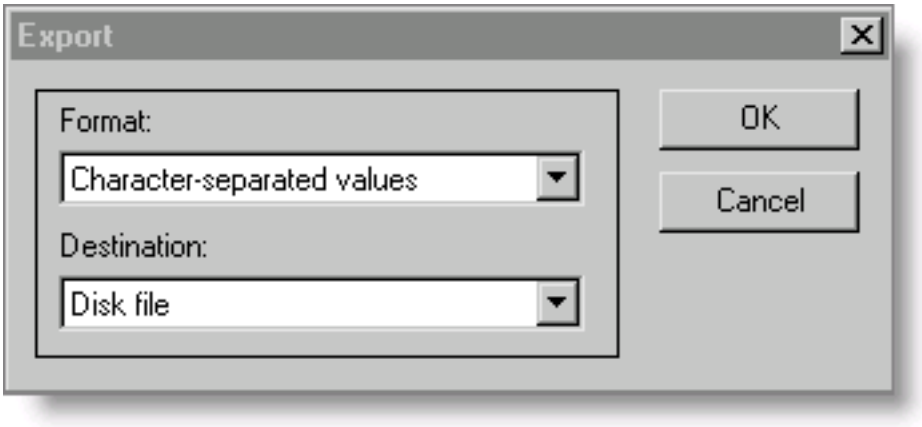
Brief descriptions of the buttons, menus, and items shown on the Crystal Preview window are shown in the following example.



Open Items by Name — Tuesday, May 28, 2002
Advanced Solutions International, Inc. — Page 1

ID	Name	Member Type	Invoice Date	Item	Amount Due	Total
159	Acme, Inc.	CM	5/1/2002	BASIC	266.67	
			5/1/2002	PAC	20.00	286.67
161	Bachman Floral	NMC	5/1/2002	CHAPT/DALLAS	150.00	150.00
156	Mr. Peter L. Bachman	M	5/1/2002	BASIC	75.00	
			5/1/2002	PAC	60.00	135.00
123	Mr. Charles P. Better, LLM	A	5/1/2002	ACT	15.00	
			5/1/2002	CHAPT/DALLAS	41.67	56.67
120	Ms. Teri L. Boone	A	5/1/2002	ACT	22.33	22.33
180	Brown & Brown	CM	5/1/2002	BASIC	250.00	
			5/1/2002	PAC	20.00	270.00
107	Ms. Paula D. Caller, CPA	CPA	5/1/2002	BASIC	100.00	
			5/1/2002	CHAPT/DALLAS	125.00	
			5/1/2002	PAC	60.00	285.00
189	Cardio Systems	CM	5/1/2002	BASIC	166.67	
			5/1/2002	PAC	20.00	186.67

- To print the report, click Print.
- To export the data to a specific format, click Export. The Export window opens to allow you to select the Format and Destination of the export file.



6. Close the Crystal Preview window.

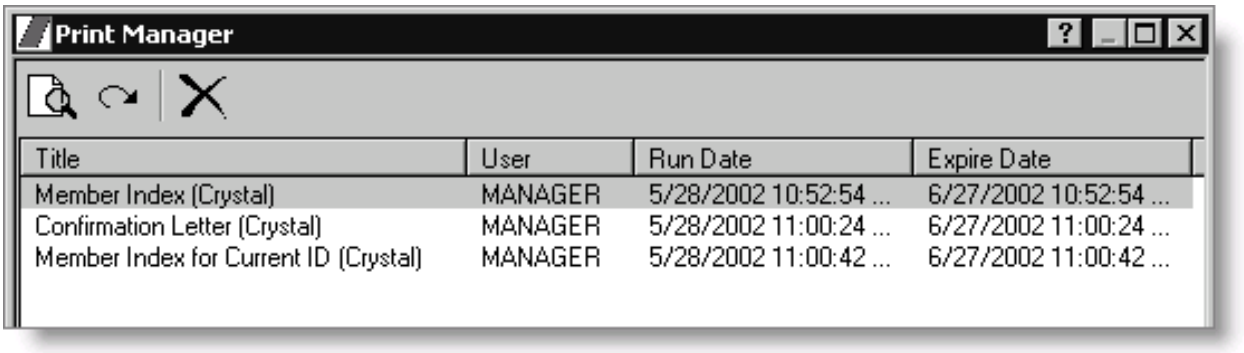
   To view a report from Print Manager

   All stored reports are kept in the Job_Record table and are assigned sequential numbers. The reports are saved in the directory designated in the System Setup window (select File> System Setup) and are stored in files labeled asi#.rpt. The Print Manager displays

only those reports that the current user has run. Only users with a system management access level of eight or higher can view all reports.

1. Open iMIS.
2. Select File> Print Manager. The Print Manager displays a list of stored reports with the following columns:

- Title (report title)
- User (the user who ran the report)
- Run Date (the date the report was run)
- Expire Date (the date the report will be purged from the Print Manager)



3. To view the report, double-click the report title, or select the report title, and click View the report. The Crystal Preview window opens. Print the complete report or select a range of pages to print.
4. To update the list, click Refresh report list.
5. To delete a report from the Print Manager, select the report, and click Delete the report(s). To select multiple reports, hold down the Shift key (to select a range) or the Ctrl key (to select individually) on your keyboard.

   Hands-on exercise: Run a report from the Print Manager

   In this exercise, you will run a saved report from the Print Manager in iMIS.

1. Select File> Print Manager. The Print Manager window opens with a list of the current stored reports.
2. Double-click the Member Index (Crystal) report. The report opens in the Crystal Preview window.

Troubleshooting when reports are not being stored

1. Make sure the report directory where the reports are to be stored has been designated (select File> System Setup).
2. Make sure the Save Report option is enabled (select Utilities> Report Specs, select the report, click Edit, and click Parameters).
3. Check the Install CD to make sure the Launch Data Access Setup was selected during installation.

Implementing report security

The Access Keywords field on the Detail Report Parameters window allows you to set up global security measures to prevent users from running or printing a report.

1. You must perform the following steps to implement the iMIS report security measures:
2. Create the ACCESS_KEYWORDS lookup table.
3. Assign an access keyword(s) to reports.
4. Assign an access keyword(s) to users.

To create the ACCESS_KEYWORDS lookup table

The first step in implementing security measures is to create the ACCESS_KEYWORDS lookup table for the reports.

1. Go to Configure, select Membership > Set up tables > Set up lookup/validation tables.

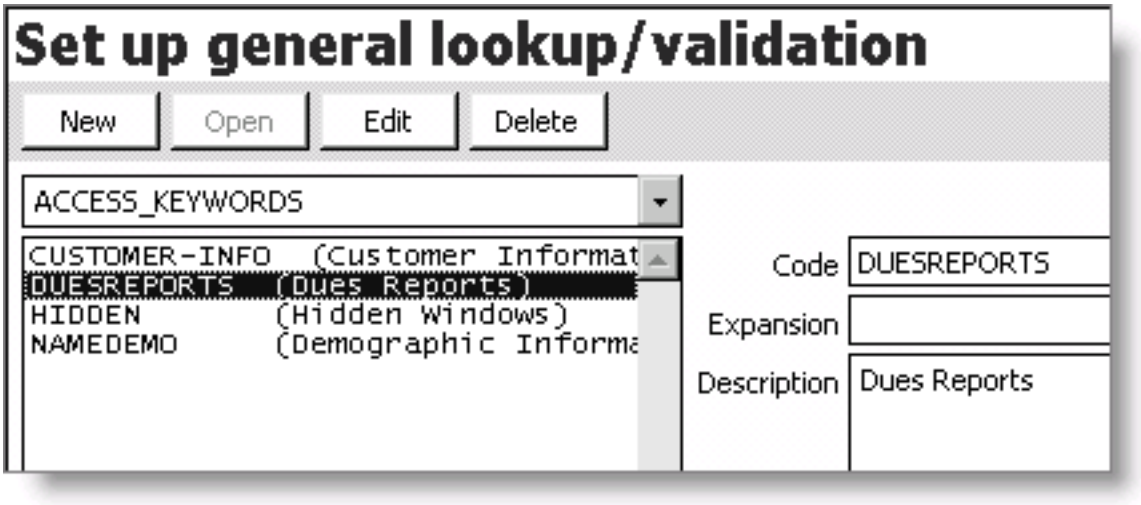
Note: Unlike other General Lookup/Validation Tables, users must have an authorization level of 8 or higher to edit ACCESS_KEYWORDS.

2. Select the drop-down list, and select ACCESS_KEYWORDS or, if the ACCESS_ KEYWORDS table does not exist:

- Select (New Table) from the list of table types. The Please Enter a New Table Type window opens.
- Enter ACCESS_KEYWORDS in the data entry field.

3. Click New.
4. Type the Code and Description for the access keyword.
5. Click Save.
6. Click New for each table entry you create, and click Save to save each entry.
7. Restart iMIS.

   Note: If an access keyword is deleted from the General Lookup/Validation lookup table, the keyword must be removed manually from the Detail Report Parameters window and the User Names window where it is used.

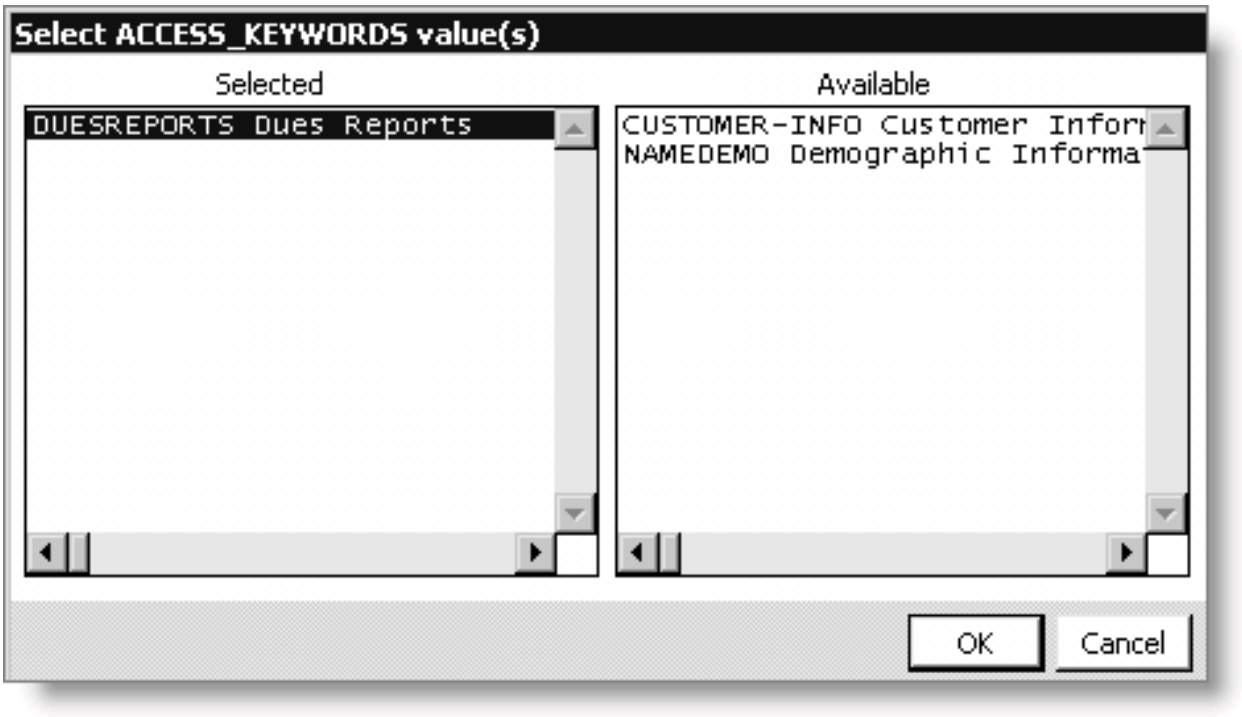


To assign access keywords to reports

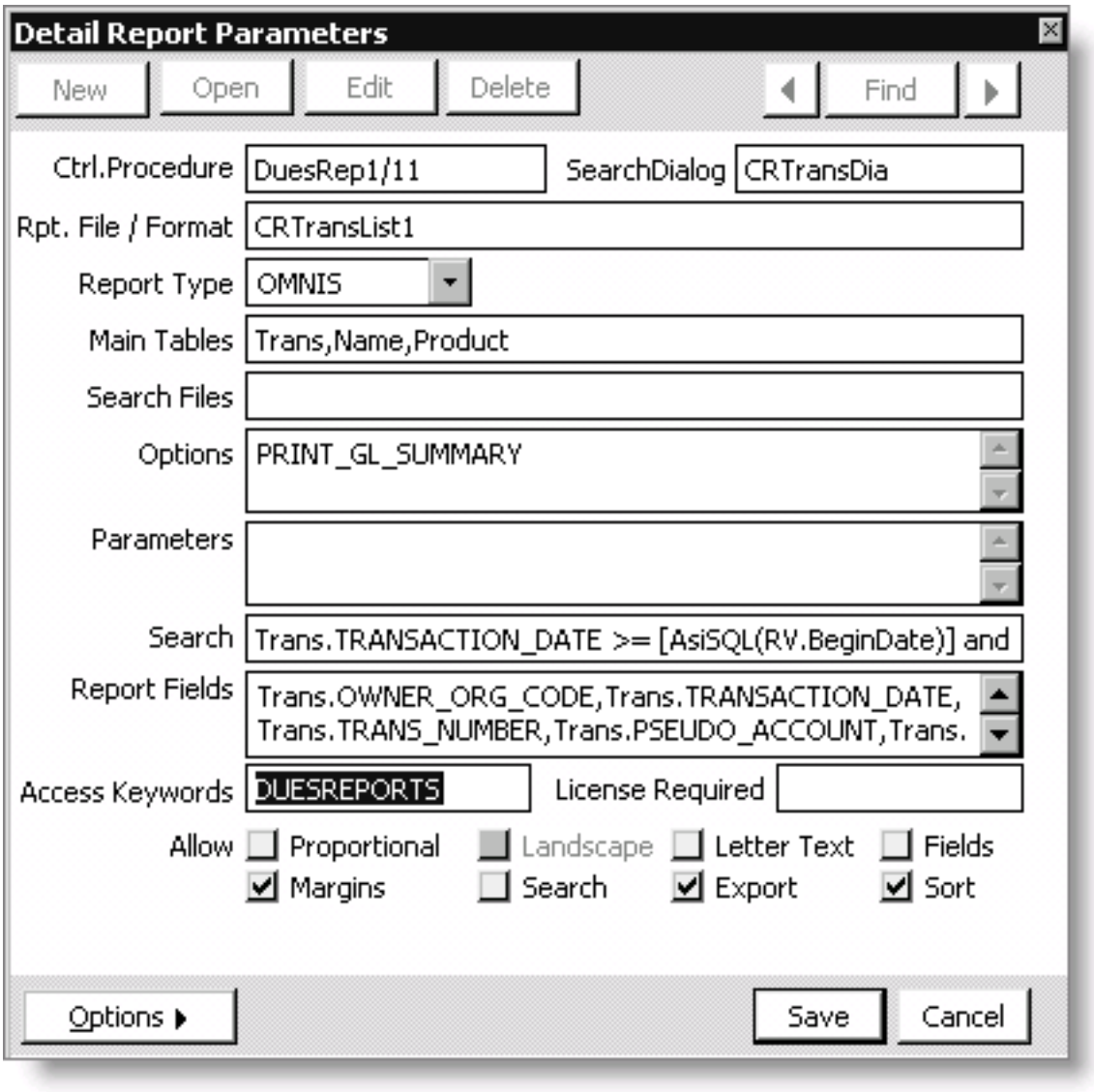
iMIS allows you to enter and assign access keywords that allow only certain users to see or to print a report. You can apply the access keywords to any report.

1. Create the access keywords in the ACCESS_KEYWORDS lookup table.
2. Select Utilities> Report Specs.
3. Select the report.

4. Click Edit.
5. Click Parameters to open the Detail Report Parameters window.
6. Place your cursor in the Access Keywords field, and press Ctrl+L to select from the available access keywords.
7. Double-click the keyword to move the keyword from the Available area to the Selected area.



8. Click OK. The selected keyword displays in the Access Keywords field.



9. Click Save to save the information.
10. If you have assigned access keywords to a report, give the appropriate users permission to view and print the report.

    To assign access keywords to users

    Now that you have defined the ACCESS_KEYWORDS values and assigned the keywords to reports, you are ready to assign access keywords to the individuals who will be using the reports.

1. Log on to iMIS as MANAGER.
2. From System Setup, select Security administration > Users.
3. Find a Full or Casual user and open their user record.
4. Enter an authorization level for each module in which the user has access.
5. Enter the access keywords, if any, for this user in the Access Keywords field. The access keywords grant the user access to areas of functionality associated with the designated keyword.
6. Click Save to save the information.
7. Restart iMIS.

Tips and Tricks: Crystal reports

Printing

- To print Crystal reports (which includes both Print to Screen and Print PDF file to Screen), you must have the free Adobe® Reader® installed on both the server and your work-station.
- If you are experiencing problems with your margins, you might want to check your print driver's default margins. The print driver's default margins will override all other margins.
- To cancel a print job, you must have permissions to the print server.

Can Grow Fields

- Crystal has an option that prevents data fields from being truncated. This prevents longer names from being cut off. This option should be set on all fields except date fields and numeric fields.
- To set the Can Grow option globally: Select File> Options, select the Fields tab, click String, select the Common tab, and enable the Can Grow option.
- To set the Can Grow option on a field: Highlight the field, right-click, select Format Editor, select the Common tab, and enable the Can Grow option.

Dates

Do not hard code date formats in the report. Instead, use the system default.

Suppress blank sections

Use different detail sections for fields that you wish to suppress based on selection criteria or, if there will be no data in those fields, for some records.

Report access

To access a module's reports, you must be assigned either to the module's group or to the Reporting group. You will see only folders and documents that match your permissions.

To see the Generate reports link on the iMIS Home page, you must be assigned to the Reporting group.

Runtime parameters

- An asterisk (*) next to a parameter name shows that it is required.
- With an optional parameter, either enter a parameter to narrow the search or leave it blank to obtain all records.
- In addition to default parameters (OrgName, ReportTitle, OperatorName, and DateTimeSubmitted), Crystal reports might use others: refer to the Crystal Report Specifications for report-specific parameters.
- If you see no default value (the field is empty), you can enter your own value. However, if a default value appears, you must select from among the values in the drop-down list.
- If you change the original parameters in preview mode, be sure to select Change Parameters before generating the report.
- If you expect parameters but see none, ask the creator of the output process to enable the Show Parameters at Runtime option.

Troubleshooting: Crystal reports
Validation errors

The following conditions will produce a validation error when creating a Crystal report output process:

- A required field has not been populated. The message will state which required field was not supplied.
- A parameter required for the template or query has not been supplied. The message will state which parameter was not supplied.
- The query assigned to the output process does not contain the business object driver object type as a source.

Printing errors

Problem: The error message "Could not open print engine" displays when trying to run a custom Crystal report from the iMIS Generate reports window.

Solution 1: Make sure the full version of Crystal is installed on your workstation. The error message may display if you are accessing the runtime dlls from the network instead of your workstation.

Solution 2: Check the printer setup.

1. Make sure all printers are set up in Windows with the actual PORT listed in front of the printer path. For example, LPT1:\\SERVERNAME\\PRINTER instead of \\SERVERNAME\\PRINTER. It is better to capture the printer port as shown in the following steps instead of manually entering the port in front of the printer path.

- Double-check your printer setup. From the Windows Taskbar, select Start> Settings> Printers. Right click on the printer, select Properties, and select the Details tab.
- Click Capture Printer Port. The first available port displays. Enter the path to the printer you wish to use, and select OK.
- After the port has been selected, the Details tab displays. Select the Print to the following port drop-down menu, and select the new destination that was set up on the previous screen.

2. Also, some print drivers will cause this error. It usually is caused unexpectedly when you install new software. When this occurs, reinstall the original print drivers.
3. Also, note the following for general printing issues:

   iMIS requires temporary storage on the local hard drive when sending reports to the screen. If you are unable to print reports to the screen, review the following:

- The TEMP environment variable listed in your autoexec.bat file may be pointing to an invalid location. Check to make sure this variable is valid.
- There may be no free space available on the local drive. Check to make sure you have at least a few megabytes available.
- The TEMP environment variable may be pointing to a valid directory, but the directory may be filled. Check to see if the temporary directory is full. If so, delete unwanted files.

On Your Own

1. In which directory are the iMIS standard reports kept?
2. What is the purpose of the Print Manager?
3. Which iMIS table stores reports?
4. What are the three steps required to implement report security?

Advanced Report Customization

Tip: See Security Administration for details about limiting access to reports.

See International Taxation for details about customizing reports for Canadian and VAT taxation needs.

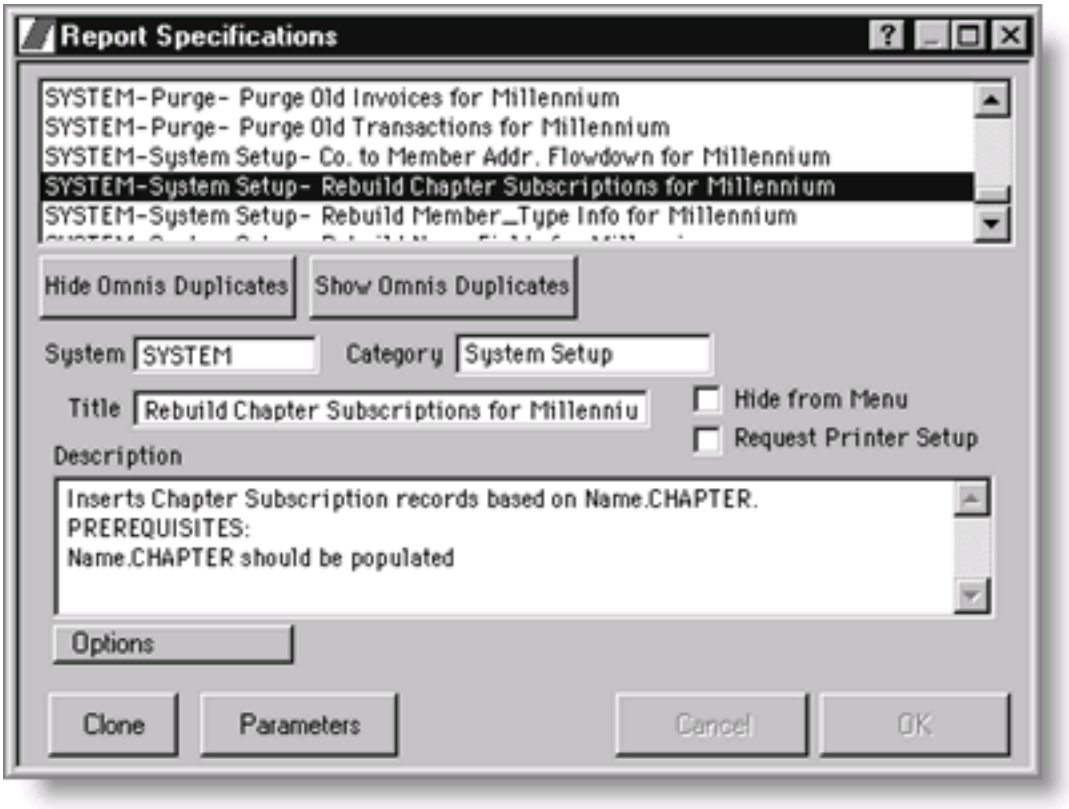
Adding Custom Scripts to System Reports/Queries

System administrators can execute custom SQL scripts by first setting up report specifications. The benefit of executing a SQL script in this method is that the script can be automated from the iMIS front-end and report driven.

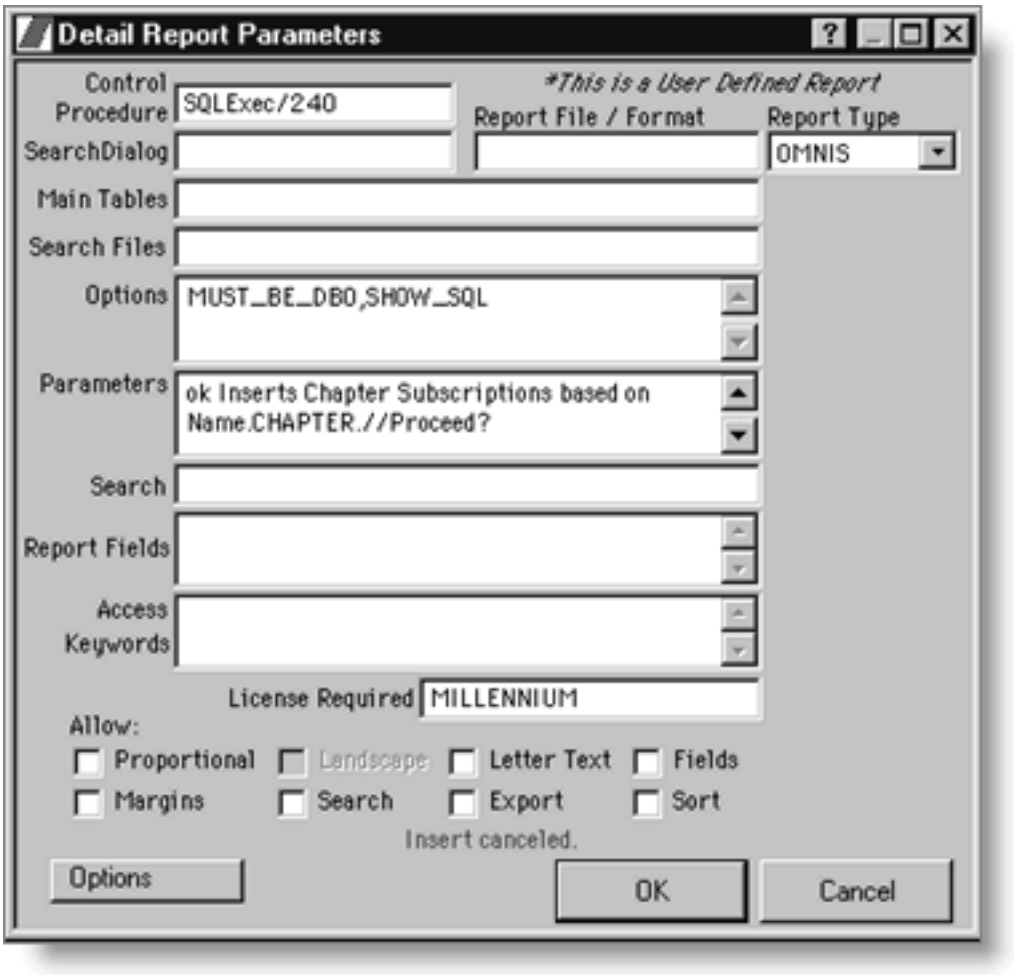
1. Select Utilities> Report Specs.
2. Select a report from the SYSTEM-System Setup group to clone.
3. Click the Clone button.

4. Enter a System, Category, Title and Description.
5. Click the Parameters button.
6. Enter SQLExec/240 in the Control Procedure box.
7. Enter MUST_BE_DBO,SHOW_SQL in the Options box.
8. Substitute the script in the Parameters box on the Detail Report Parameters window

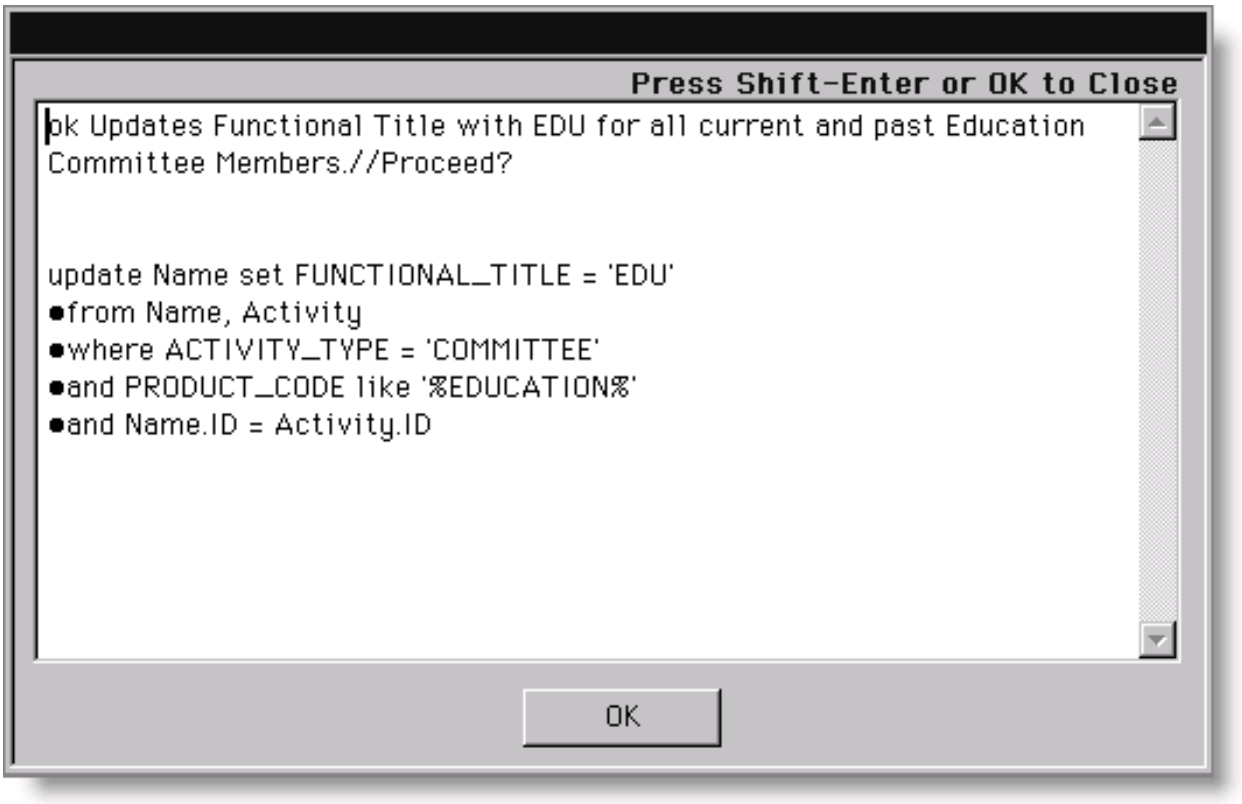
   Note: Place your cursor in the Parameters box and press CTRL+Z or click the Zoom button to open the parameters window.
9. Click OK to accept the changes. You can now execute the script from the Utilities> Reports & Queries window from within iMIS.
10. Click Run to execute the command. iMIS prompts you to confirm the action Updates Functional Title.
11. Click Yes to execute the script.



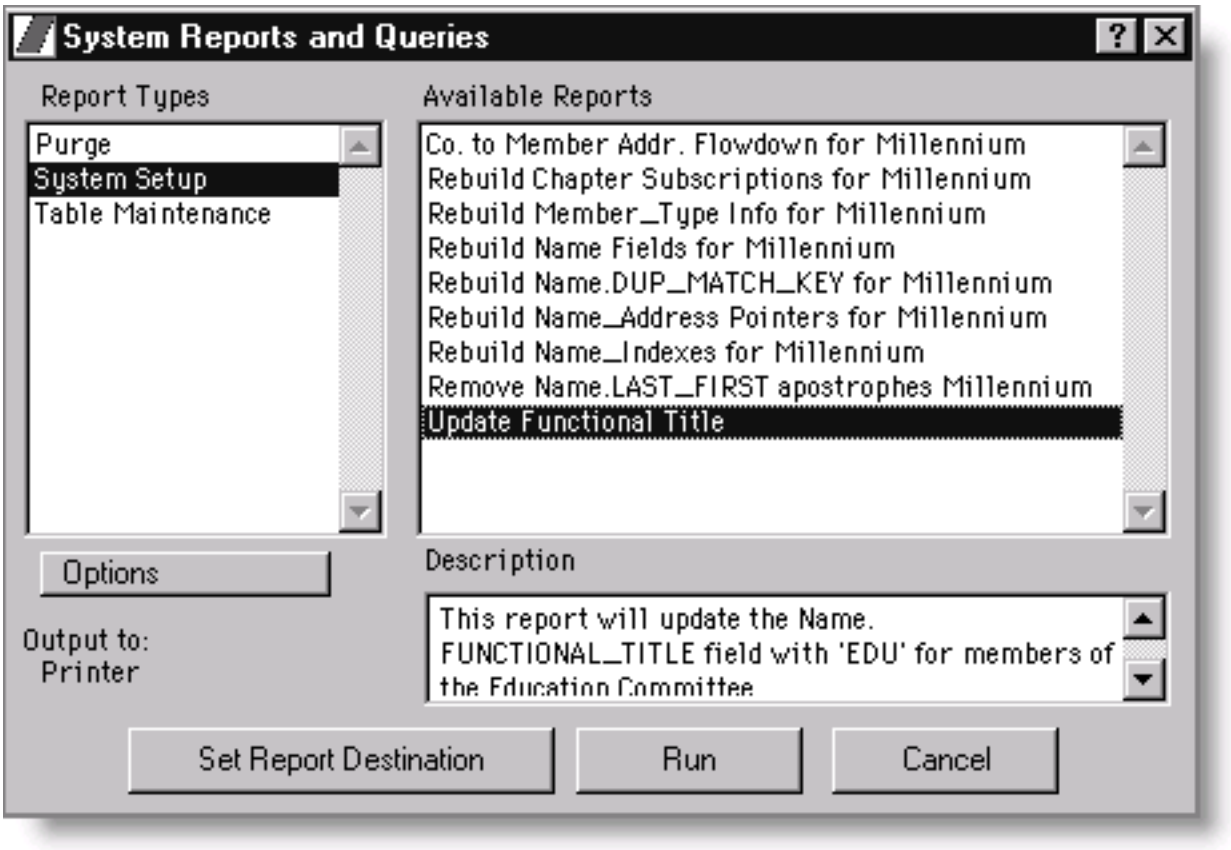
Example: Select a Report from the SYSTEM-System Setup.



Example: Enter MUST_BE_DBO,SHOW_SQL in the Options box.



Example: Substitute the script in the Parameters box.



Example: You can now execute the script.

Creating a Report Role with Restricted Rights

Some users will only need to perform certain functions for iMIS data. They should not be able to perform other tasks on the system. This prevents the user from viewing data that does not pertain to their reporting responsibilities.

You can create a role restricting users to specific tables, used in running reports, with SQL Server Enterprise Manager. All dbo owned tables and views except Users, System_Params, Security_Filters, Security_Groups, Security_Modes, Security_Tables are used in reporting.

For more information refer to the Microsoft SQL Server Enterprise Manager user documentation.

To add Access reports to the menu

1. Create the Access report.

2. Select Utilities> Report Specs to open the Report Specifications window.
3. Click Insert to enter a new report specification.
4. Enter the System and Category where you want the Access report to appear.
5. Enter a unique Title for the new report.
6. Click Parameters to open the Detail Report Parameters window.
7. Enter RunCommand in the Control Procedure field.
8. Enter the following data in the Parameters field to point to the sample report NameMailAddressLabels in the iMIS database:

   (Enterprise database)

   <<Command>> “c:\Program Files\Microsoft

   office\Office\MsAccess.exe”

   “c:\imis_ent\access\imis_ent.mdb”;Report;NameMailA

   ddressLabels;Screen (or Printer)

   To add one of your reports in your Access database, enter:

   <<Command>> “c:\Program Files\Microsoft

   office\Office\MsAccess.exe” “full-path-to-yourdatabase-

   file”;Report;your-report-name;Screen (or

   Printer).

   Note: The << >> symbols are less-than and greater-than symbols, not chevrons.
9. Click OK on the Detail Report Parameters window.
10. Click OK on the Report Specifications window.

Generating and Managing Mass Report Activity Records

This standard feature allows the user to create mass activity records when running system-generated Omnis and Crystal reports. To enable this feature, the PRINT_CREATE_

ACTIVITY option will need to be entered in the Options field on the Detail Report Parameters window. The default value for this field is NO_CREATE_ACTIVITY.

When PRINT_CREATE_ACTIVITY is entered in the Options field on the Detail Report Parameters window, the Create Activity option will be enabled on the Selections window. You can choose to not create activity records by disabling the option.

The NO_CREATE_ACTIVITY option should display in the Options field for the following report specifications:

- Certification - Labels, letters, and exports
- Fundraising - Exports, reminder notices, and letters
- Events - Badges, certificates, confirmations, exports, labels, letters, and tickets
- Customers - CEU Detail report, certificates, exports, labels, and letters
- Orders - Labels

To update report specifications

To update additional report specifications, edit the Detail Report Parameters window to add either PRINT_CREATE_ACTIVITY or NO_CREATE_ACTIVITY to the Options field.

1. Select Utilities> Report Specs to open the Report Specifications window.
2. Select a report.
3. Click Edit.
4. Click Parameters to open the Detail Report Parameters window.
5. Enter one of the following commands in the Options field:

- Enter PRINT_CREATE_ACTIVITY to enable a Create Activity checkbox on the report request screen; or
- Enter NO_CREATE_ACTIVITY to display a disabled Create Activity checkbox on the report request screen.

6. Click Save.

The Options field in the Detail Report Parameters window.

To create a report-specific activity type

Activities used as report activities must have the Allow user Edit option enabled.

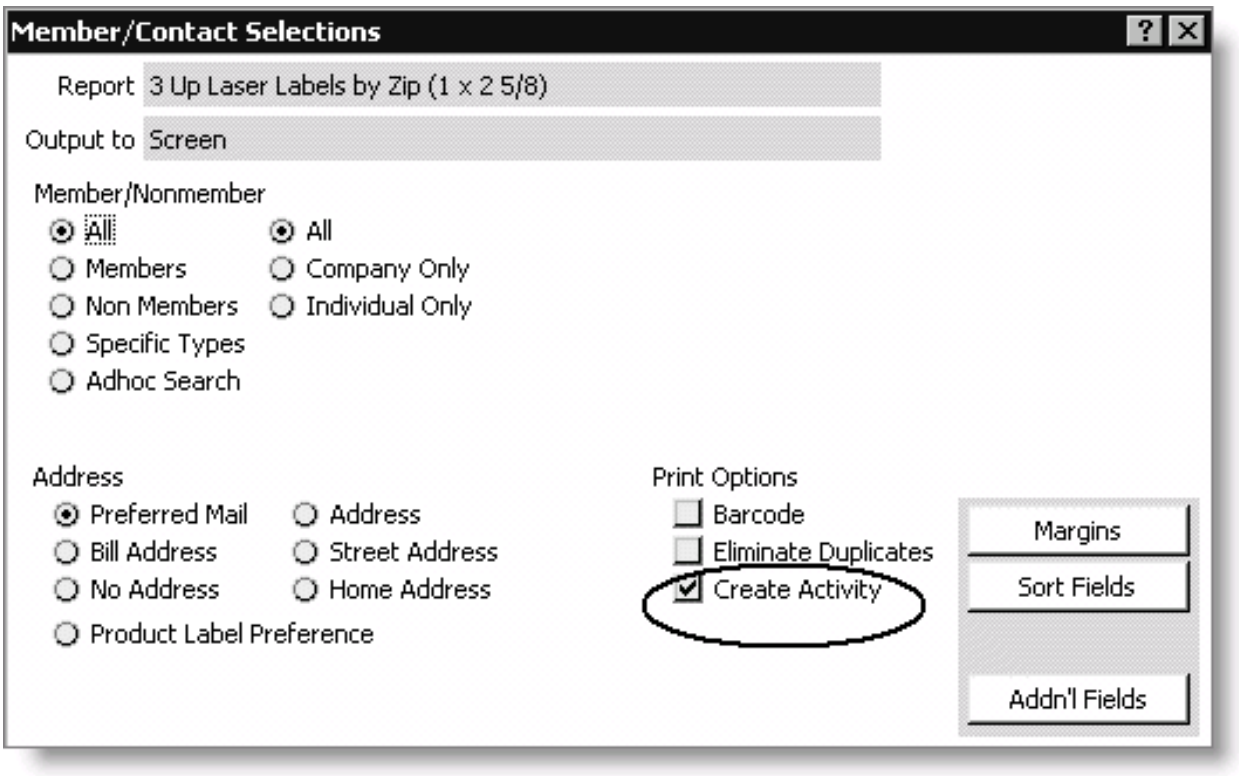
1. Go to Configure, select Membership > Set up tables > Set up activity types.
2. Click New.
3. Enter an activity name, for example, REPORT.
4. Tab to Description, and enter a description, for example, Report Generation Activity.
5. Tab to the Description prompt field, and enter a prompt, for example, Report Desc. This field will store the description of the report.
6. Tab to the Source prompt field, and enter a prompt, for example, Promotion Code.
7. Enable the Allow user Edit option.
8. Click Save.

To request a report and generate activities

1. From Customers, select Generate reports.
2. Select your Report Type and the desired report from the Available Reports list.
3. Select the appropriate Report Destination.
4. Click Run. The Member/Contact Selections screen appears.
5. Enable your desired member/contact selections for your report, making sure the Create Activity box is selected. Click OK to open the Activity Detail window.
6. Enter an Activity Type, or press Ctrl+L to select a value.

7. Enter a Source Code, or press Ctrl+L to select a value.
8. The Date field will default to the system date and can be changed if necessary.
9. The Description field will default to the report title on the Report Selection window.

   Note: Clicking Cancel will cancel the activities, but the report will process.
10. Click Save to process the report.
11. A dialog box shows the number of activities to be inserted and asks if you want to run the procedures. Select Yes.



The Member/Contact Selections Window

To view activities after report processing

After the report processing is complete, activity records can be viewed.

1. From Customers, select Manage customers.

2. Find a customer record for which a previous report was processed, for example, 105.
3. Select the Activities-All tab.
4. Select the activity created to open the Activity Detail window.

The Letter System (Word Merge)

iMIS uses the Merge feature of Microsoft Word™ to let Word be your organization's word processor for bulk mailings and 1-off letters, using the data in your iMIS database.

Word templates

Default templates are used as a starting point when creating a Word merge. When a user sets up a Word merge, the default template structure is copied to a new Word document. The default template contains a set of merge fields which come configured with iMIS but may be customized by an administrator.

Merged documents

Users can make changes to the the Word document that is used for a particular merge, but these changes will not affect the template on which the document was based.

Custom merge fields

Administrators chose the fields that are available to users for their Word merges. Users can add fields to their Word merge document, but these fields must be chosen from the fields that you make available to them when configuring Word merge for the module in question.

Reverting changes

If you have made modifications to the default template that no longer meet your needs, you can revert to the default template and available fields.

Implementing the Letter System

Authorizing access to the Letter System

To use the Letter System from the Generate reports window, users must have authorization level 2 or greater, except for these places where level 1 suffices:

- In Customers, the Letters tab (select Manage customers, find a customer record, select the Letters tab, and then click New Letter).
- In Events, select Register a customer, find a registrant, and then click Letter

To add fields to the list of available fields in the Letter System, and to define the fields that are available in the Letter System, you must have authorization level 8.

Enabling the Letter System

No license key is required to use the Letter System.

To enable the Letter System

1. In System Setup, specify a folder (see below) for the Letter System's templates.
2. Grant user logons authorization level 2 or greater, which is generally required to use the Letter System.
3. Ensure that those client computers have Microsoft Word installed.
4. When installing iMIS Desktop on client computers, select the Letter System option.

To enable the Letter System, you must specify a folder its template files. All iMIS users must specify the same folder path, whether it's local or remote. The path you specify is stored in the iMIS System_Params table, as the ParameterName value of System_Control.MSWordStoreDirectory.

Note: Truncating the Report Specs table deletes the Microsoft Word template report specifications.

To specify a folder for Letter System template files

1. Log on to iMIS.
2. Select File > System Setup.

   The System Setup window opens.
3. Click Edit.
4. Click Choose MS Word Folder (or enter a folder path in the field next to that button).

The Browse for Folder dialog box appears.

- Select a local or remote folder.

  If you specify a remote folder, make sure that all users have permissions to access to the folder.

- Click OK.

5. In the System Setup window, click Save.
6. Log out of iMIS, and then log on again.

   Related information

- To disable the Letter System
- Authorization for the Letter System (see "Authorizing access to the Letter System")
- Troubleshooting the Letter System

  To disable the Letter System

1. Open a command prompt.
2. Navigate to your local system directory (for example, the \WINNT\system32 directory).
3. Unregister the ASIWordInt.ocx Active X control by typing:

   regsvr32 ASIWordIntocx /u

4. Delete the ASIWordInt.ocx file.

Defining the fields available in letter templates

You can change and reorder the fields that are available in the Letter System.

Note: The changes you make with this procedure affects only new templates. Templates that you create by copying an existing template are not affected.

Related information

- Creating a letter template
- To add fields to the list of available fields in a template (see "Adding a field to a Letter System template")
- Fields Available in the Letter System

  To define the fields that are available in letter templates

  Note: You must have authorization level 8 for the module in which you wish to perform this procedure.

1. Log on to iMIS, and open the window of a module that includes the Letter System.
2. From the reports window, select a Letters report type.
3. Click Letter System.

   The (module name) Standard Letters window opens.
4. Click Setup.

   The Setup Standard Letters window opens.
5. Specify field properties for this module.
6. Click Save.

   Fields available in the Letter System

   The following iMIS fields are available in the Letter System, and display for each MS Word template in the Report Fields field on the Detail Report Parameters window (select Utilities > Report Specs, select a template, click Edit, and click Parameters):

   Note: You can add other fields to your MS Word templates (see "Adding a field to a Letter System template").

   Customer Management

   Name.CO_ID

   Name.COMPANY

Name.COUNTY

Name.DESIGNATION

Name.EMAIL

Name.FIRST_NAME

Name.FULL_NAME

Name.ID

Name.INFORMAL

Name.LAST_NAME

Name.MIDDLE_NAME

Name.PREFIX

Name.SUFFIX

Name.TITLE

Name_Address.ADDRESS_1

Name_Address.ADDRESS_2

Name_Address.ADDRESS_3

Name_Address.CITY

Name_Address.COUNTRY

Name_Address.CRRT

Name_Address.FULL_ADDRESS

Name_Address.MAIL_CODE

Name_Address.STATE_PROVINCE

Name_Address.ZIP

Events

Meet_Master.ADDRESS_1

Meet_Master.ADDRESS_2

Meet_Master.ADDRESS_3

Meet_Master.BEGIN_DATE

Meet_Master.CITY

Meet_Master.COORDINATORS

Meet_Master.COUNTRY

Meet_Master.DIRECTIONS

Meet_Master.END_DATE

Meet_Master.NOTES

Meet_Master.STATE_PROVINCE

Meet_Master.TITLE

Meet_Master.ZIP

Order_Meet.ARRIVAL

Order_Meet.DEPARTURE

Order_Meet.MEETING

Orders.BALANCE

Orders.CO_ID

Orders.COMPANY

Orders.CRRT

Orders.EMAIL

Orders.FULL_ADDRESS

Orders.FULL_NAME

Orders.MAIL_CODE

Orders.NOTES

Orders.ORDER_NUMBER

Orders.ST_ID

Orders.TITLE

Orders.TOTAL_CHARGES

Orders.TOTAL_PAYMENTS

Exposition

Meet_Master.ADDRESS_1

Meet_Master.ADDRESS_2

Meet_Master.ADDRESS_3

Meet_Master.BEGIN_DATE

Meet_Master.CITY

Meet_Master.COORDINATORS

Meet_Master.COUNTRY

Meet_Master.DIRECTIONS

Meet_Master.END_DATE

Meet_Master.NOTES

Meet_Master.STATE_PROVINCE

Meet_Master.TITLE

Meet_Master.ZIP

Order_Meet.ARRIVAL

Order_Meet.DEPARTURE

Order_Meet.MEETING

Orders.BALANCE

Orders.CO_ID

Orders.COMPANY

Orders.CRRT

Orders.EMAIL

Orders.FULL_ADDRESS

Orders.FULL_NAME

Orders.MAIL_CODE

Orders.NOTES

Orders.ORDER_NUMBER

Orders.ST_ID

Orders.TITLE

Orders.TOTAL_CHARGES

Orders.TOTAL_PAYMENTS

Fundraising

Fields are created from the view and will display the max and sum prefix.

max(Activity.ACTIVITY_TYPE)

max(Activity.DESCRIPTION)

max(Activity.ORIGINATING_TRANS_NUM)

max(Activity.TAXABLE_VALUE)

max(Activity.TRANSACTION_DATE)

max(Name.CITY)

max(Name.CO_ID)

max(Name.COMPANY)

max(Name.COUNTRY)

max(Name.CRRT)

max(Name.EMAIL)

max(Name.FULL_ADDRESS)

max(Name.FULL_NAME)

max(Name.ID)

max(Name.MAIL_CODE)

max(Name.STATE_PROVINCE)

max(Name.TITLE)

max(Name.ZIP)

max(Name_Salutation.SALUTATION_TEXT)

max(Sender_Codes.SENDER_DESCRIPTION)

max(Trans.MERGE_CODE)

sum(Activity.AMOUNT)

Certification

Cert_Program.ID

Cert_Program.PROGRAM_TYPE

Cert_Program.TITLE

Cert_Register.BOARD_NOTIFIED

Cert_Register.CANCELED_DATE

Cert_Register.COMPLETION_DATE

Cert_Register.DEADLINE

Cert_Register.ENROLLED_DATE

Cert_Register.REGISTRATION _ITEM

Cert_Register.STATUS

Cert_Register.STUDENT_ID

Name.CITY

Name.CO_ID

Name.COMPANY

Name.COUNTRY

Name.EMAIL

Name.FULL_NAME

Name.INFORMAL

Name.STATE_PROVINCE

Name_Address.CRRT

Name_Address.FULL_ADDRESS

Name_Address.MAIL_CODE

Referral: Provider Letter

Name.COMPANY

Name.COMPANY_RECORD

Name.DESIGNATION

Name.EMAIL

Name.FIRST_NAME

Name.FULL_ADDRESS

Name.FULL_NAME

Name.ID

Name.INFORMAL

Name.LAST_NAME

Name.MIDDLE_NAME

Name.PREFIX

Name.SUFFIX

Name.TITLE

Name.WORK_PHONE

Orders.BALANCE

Orders.CO_ID

Orders.COMPANY

Orders.FULL_ADDRESS

Orders.FULL_NAME

Orders.ORDER_NUMBER

Orders.ST_ID

Orders.TITLE

Orders.TOTAL_CHARGES

Orders.TOTAL_PAYMENTS

Ref_Client.ADDRESS_1

Ref_Client.ADDRESS_2

Ref_Client.ADDRESS_3

Ref_Client.CITY

Ref_Client.CLIENT_ID

Ref_Client.COMPANY

Ref_Client.COUNTRY

Ref_Client.DATE_CREATED

Ref_Client.EMAIL

Ref_Client.FIRST_NAME

Ref_Client.LAST_FIRST

Ref_Client.LAST_NAME

Ref_Client.MIDDLE_NAME

Ref_Client.NOTE

Ref_Client.STATE

Ref_Client.ZIP

Ref_Provider.COMPANY

Ref_Provider.LAST_FIRST

Ref_Provider.PHONE

Ref_Provider.PROVIDER_ID

Ref_Provider.REFERRAL_COUNT

Ref_Provider.STATUS

Ref_Provider.ZIP

Referral.NO_SHOW

Referral.REFERRAL_FEE

Referral.REFERRAL_ID

Referral: Client Letter

Name.COMPANY

Name.COMPANY_RECORD

Name.DESIGNATION

Name.EMAIL

Name.FIRST_NAME

Name.FULL_ADDRESS

Name.FULL_NAME

Name.INFORMAL

Name.LAST_NAME

Name.MIDDLE_NAME

Name.PREFIX

Name.SUFFIX

Name.TITLE

Name.WORK_PHONE

Ref_Client.ADDRESS_1

Ref_Client.ADDRESS_2

Ref_Client.ADDRESS_3

Ref_Client.CITY

Ref_Client.CLIENT_ID

Ref_Client.COMPANY

Ref_Client.COUNTRY

Ref_Client.DATE_CREATED

Ref_Client.EMAIL

Ref_Client.FIRST_NAME

Ref_Client.LAST_FIRST

Ref_Client.LAST_NAME

Ref_Client.MIDDLE_NAME

Ref_Client.NOTE

Ref_Client.STATE

Ref_Client.ZIP

Ref_Provider.COMPANY

Ref_Provider.LAST_FIRST

Ref_Provider.PHONE

Ref_Provider.PROVIDER_ID

Ref_Provider.REFERRAL_COUNT

Ref_Provider.STATUS

Ref_Provider.ZIP

Referral.NO_SHOW

Referral.REFERRAL_FEE

Referral.REFERRAL_ID

Creating Letter System templates

The Letter System allows you to create and edit letter templates for use with Word's Merge feature. The Letter System integrates Microsoft Word with many areas of iMIS:

- Customers
- Events
- Exposition
- Fundraising

- Certification
- Referrals
- Committees

For best results, customize the templates for your organization. An iMIS administrator can change which iMIS fields are available for use in letter templates. Create the content for each letter template, including the common text, styles, layout, and the fields that best suit each letter or email.

Tip: Customers can track Letter System communications as Activity records.

Creating a letter template

The fields that are available in the template depend upon whether you create a new template or copy an existing template.

- A new template can use the fields that are currently available for this module.
- A copy of an existing template can use the fields that were available when the existing template was created.

Related information

- Defining the fields that are available in letter templates (see "Defining the fields available in letter templates")

Before you begin

- Close other instances of MS Word, if any are running.
- Complete any edits in iMIS, if any records are open.
- Log on to iMIS, and open the window of a module that includes the Letter System.

To create a letter template

1. From the reports window, select a Letters report type.

   Note: The Available Reports list is empty. Letter reports are selected on the (module name) Standard Letters window.

2. Click Letter System.

   The (module name) Standard Letters window opens.

3. Create a new template or copy an existing template.

- To create a new template, click New.
- To copy an existing template, select the name of the template to copy, and then click Save As.

  The New Standard Letters window opens.

4. In the Report Title field, enter a name for this letter template. For example, Established Member Letter.
5. In the Report File field, enter a file name for this letter template. For example, est_mem.
6. Click OK.

   iMIS displays the new template information in the (module name) Standard Letters window, and starts MS Word with the new template file. You can edit the template and add iMIS database fields now or later.

7. Save the template file and exit MS Word.

Adding a field to a Letter System template

You can add fields from any iMIS table to the list of available fields in a Letter System template, within these limits:

- Images: You cannot add a field containing image data, such as Name_Picture.PICTURE_LOGO.
- UDTs: You cannot override the restrictions that are built into user-defined tables. For example, if you add a field to a template from a user-defined table that is restricted to a specific member type, the merge results can include only those records that match the member type. This is true even when the template does not use any of the fields from the table that is the source of the restriction.

  To add a field to a report specification

Note: You must have authorization level 8 to perform this procedure.

1. Select Utilities > Report Specs to open the Report Specifications window.
2. Select a Word template to edit.
3. Click Edit.
4. Click Parameters to open the Detail Report Parameters window. The template file name displays in the Rpt File / Format field, and the Report Type is shown as MSWORD.
5. Edit the report properties.

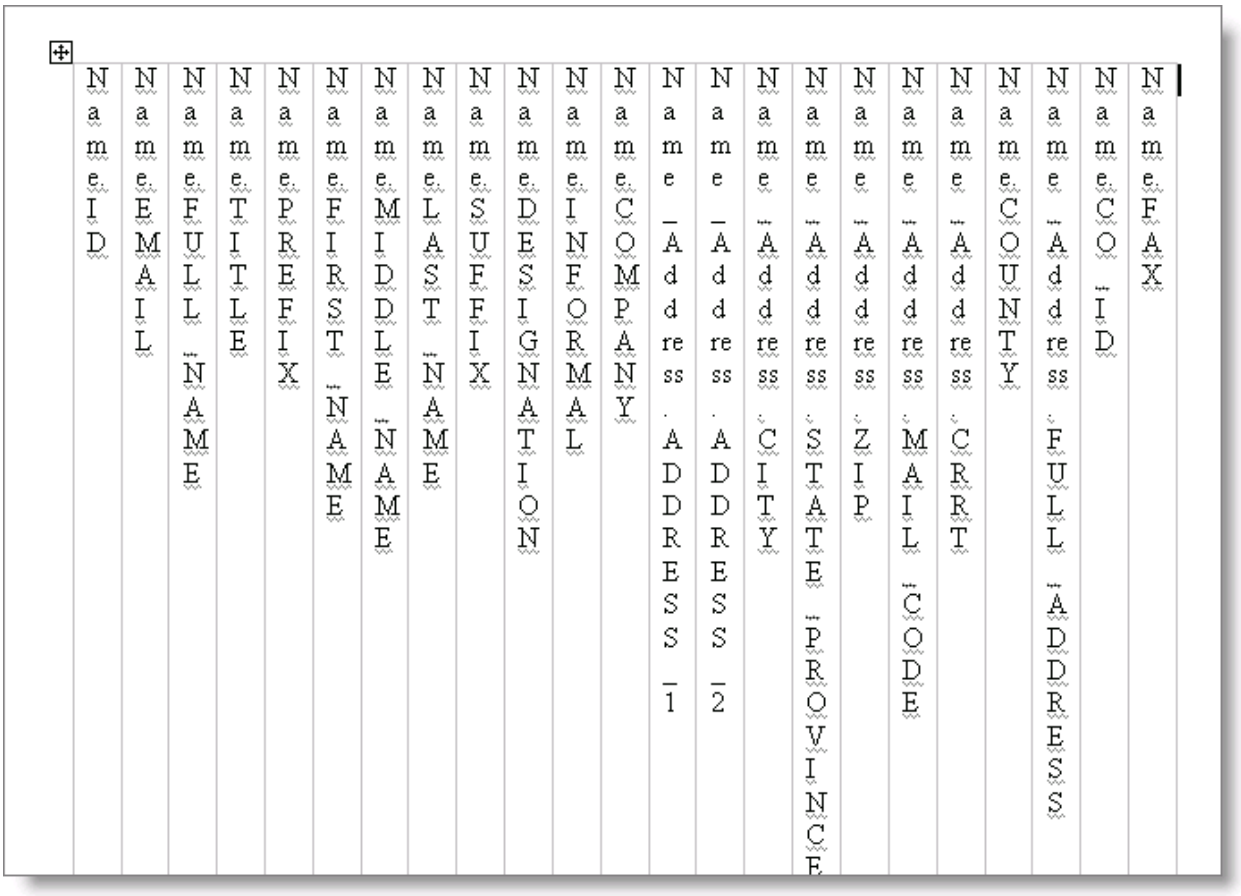
- (optional) In the Main Tables and Search Files fields, enter the table name.
- In Report Fields, enter new field names after the existing field names. For example, Name.FAX.

6. Select and copy the new field name to the clipboard.
7. Select Save.
8. Now add the field to the header file (below).

To add a field to the Word template header file

1. Browse to the folder in which Letter System template files are stored.
2. Open the header file for the template you are editing. The file name for header files end in _header.doc.
3. At the end of the table, insert a new column.
4. Paste the new field name that you copied from the Detailed Report Parameters window into the new column.
5. Important: Verify that the new field appears in the same order as it does in its report specification.
6. Save and close the document.

When this template is used, the new field appears at the end of the list in Word.



Sample of a _header.doc

Using Word field switches in Letter System templates

You can apply the switches available in Microsoft Word to the merge fields in your Letter System templates. These switches let you modify the format of the data that results from the merge fields you add to your letter. Refer to Microsoft Word documentation for more on using switches to change the format of merged data.

Note: The switch must be placed after the “MERGEFIELD” but before the curly bracket }. For example { MERGEFIELD Name * Caps }.

The numeric picture (\#) and format (*) switches are the two most common types of switches used in merging letters. The following are options available when using these two switches to modify your merge data:

\# - Numeric Picture

Use this switch to specify the display of a numeric result, including the number of decimal places and the use of currency symbols.

0 - (zero) Indicates the number of decimal places to display

- Indicates the number of spaces to display

$ - Indicates to include the specified character in the result

. - (decimal point) Indicates the decimal point position

, - (comma, digit grouping symbol) Indicates where to separates a series of three digits

For example, if the Annual Review merge field has a value of 100, changing the field to {MERGEFIELD "Name_DemoANNUAL_REVIEW \#$#,0.00}
displays $100.00 for the result.

* - Formats

Use this switch to specify number formats, capitalization, and character formatting; prevents changes to the format of the field results when a field is updated.

* Charformat - Apply the formatting of the first letter of the field type to the entire result

* Caps - Indicates the first letter of each word should display as a capital letter

* FirstCap - Indicates the first letter of only the first word should display as a capital letter

* Upper - Indicates all the letters should be capitalized

* Lower - Indicates all the letters should be lowercase

For example, if the {NameFULL_NAME} merge field results in a value of Ms. Jean D. Smythe, changing the field to {NameFULL_NAME * Upper} results in a value of MS. JEAN D. SMYTHE.

Converting checkbox values to text

When you add a checkbox field to a letter template, iMIS inserts the database value of the field, which is either 0, for no (not selected), or -1, for yes (selected). To substitute text for

the database values, use an If-Then-Else field in MS Word. For example, { IF {MERGEFIELD Checkbox } = "0" "No" "Yes" }.

Troubleshooting the Letter System

Following are some examples of problems that may occur with the Letter System.

Blank lines in a MS Word letter or an e-mail message

Reason: A limitation in MS Word may allow blank lines to print even with the Don't print blank lines when data fields are empty option enabled on the Merge window.

Solution: Verify fields are populated.

Unable to activate Merge in MS Word

Reason 1: MS Word is open in another session.

Solution 1: Close all sessions of MS Word before performing a merge.

Reason 2: You have not chosen at least one merge field.

Solution 2: Make sure to select at least one merge field.

Problems while creating multiple templates and running merges within iMIS

Solution: Close MS Word and iMIS, then restart your iMIS application.

Message: “A field calculation error occurred in record 1.”

Reason: This error may occur in MS Word during a mass merge due to additions and deletions of the Normal.DOT template in MS Word.

Solution: Refresh the Normal.DOT originally supplied with MS Word, or regenerate it by deleting it and allowing Word to recreate it.

Message: “GetMergeData - [Sybase][ODBC Driver][Adaptive Server Anywhere]Syntax error or access violation: near “I” in …ADDRESS,Name.CO_ID[I]from Name,Name_...”

Reason: This error may occur during a single customer merge. Our testing has shown this may be due to additions and deletions of the NORMAL.DOT template in MS Word.

Solution: Refresh the NORMAL.DOT originally supplied with MS Word.

Message: “The messaging interface has returned an unknown error. If the problem persists, restart Outlook.”

Reason: This message may occur when the Letter System in iMIS is open and you are trying to send an e-mail.

Solution: Close Outlook.

Message: “This template does not exist in the MS Word folder."

Reason: The template folder is invalid or unavailable.

Solution: If the template folder is located on the client computer, check the complete path to the folder. If the template folder is located on a remote computer, check your network connection.

Letter System is not working

Reason: The Letter System is not fully enabled. Follow these steps to perform additional troubleshooting:

1. Log on to iMIS.
2. Select Help > About iMIS.

   The About iMIS window opens.
3. Click System Info.

   The iMIS System Info window opens.
4. Check the value of the ASIWordInt.ocx property.

- If the value is not loaded, the Letter System option was not selected when iMIS was installed on your client computer.
- If the value is not loaded (no MS Word), the Letter System option was selected when iMIS was installed on your client computer, but Microsoft Word is not installed.
- If the value is not loaded (no path), the Letter System option was selected when iMIS was installed on your client computer, and Microsoft Word is installed, but no folder was

specified for template files.

- If the value is not loaded (path error), the Letter System option was selected when iMIS was installed on your client computer, and Microsoft Word is installed, but the folder that was specified for template files is invalid or unavailable.
- If the value is a number, the Letter System is fully enabled. Contact Support.

Tables and fields used by the Letter System

The following tables and fields are used with the Letter System:

Activity_Attach

(stores merged MS Word documents as attachments)

ATTACH_SEQN	long integer	Primary key
TEMPLATE	varchar (255)	Name of the template used
ATTACH_TEXT	text	Text of the MS Word document as sent by the merge process

Activity

ATTACH_SEQN	long integer	Used to store a reference to an associated record in the Activity_Attach table

Report_Desc

REPORT_OPTIONS	text	PRINT_CREATE_ACTIVITY (default) - The checkbox on the Report Selection window is enabled by default. NO_CREATE_ACTIVITY - The checkbox on the Report Selection window is disabled by default

Reports and Output Processes

Understanding reports and output processes

iMIS Reports and Output Processes help you customize and manage reports, Microsoft Word merges, and email merges. These output processes use current iMIS database information and can be exported to a variety of output formats for maximum flexibility. With Reports and Output Processes, you can:

- Create and manage custom business data
- Use queries and business objects to generate output
- Customize report output
- Assign folder and document security
- Use templates to ensure consistency
- Export data to a variety of formats
- Use pre-built reports to assist non-technical users

Process

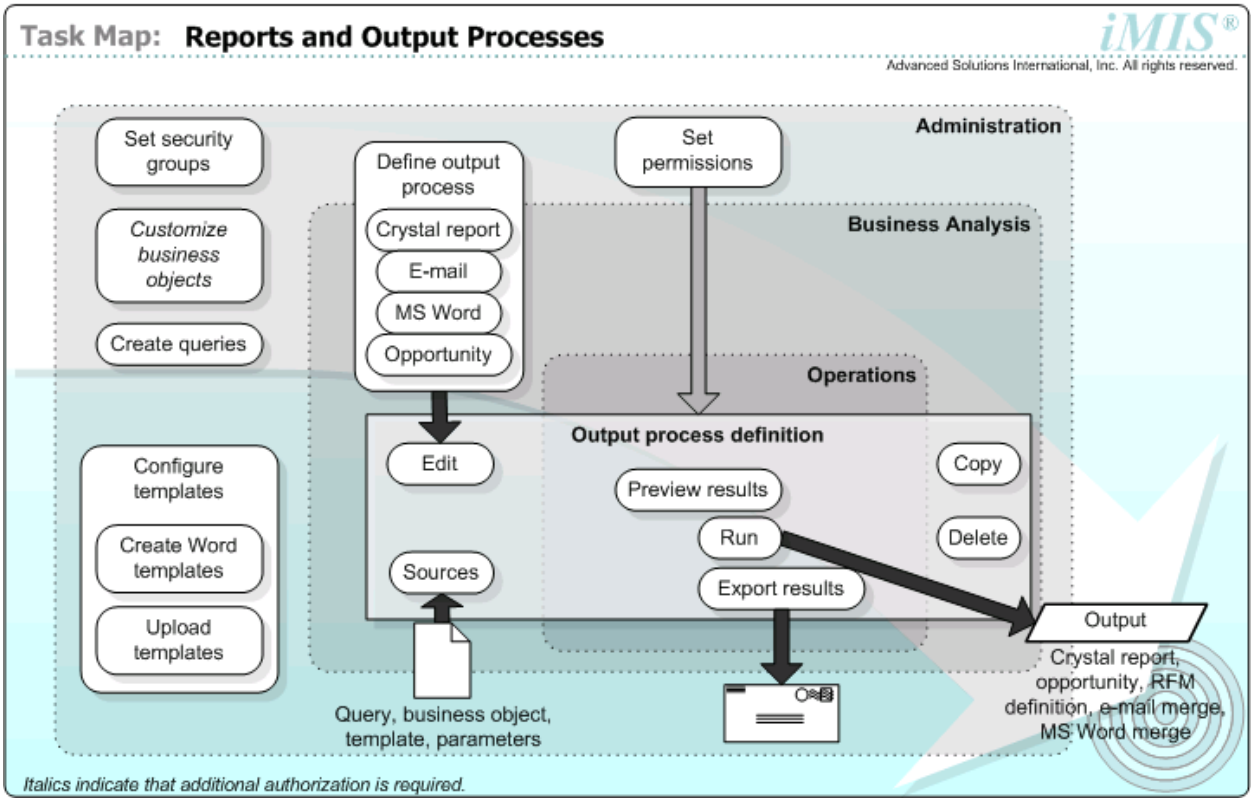
By using the flexible features, your staff can efficiently manage your organization's communications needs to meet your business goals. The process to set up and use Reports and Output Processes is:

- In Tools, administrators modify default output processes/reports or create new ones.
- When using an application, managers can modify items in the output processes/reports folders, within limits set by the administrators, and run reports and output processes.
- Users can run reports and output processes through a simple interface, inputting any required information specified the administrators.

In this tiered approach, managers and users do not have to know report setup or database schema to modify and run reports. Security settings determine the information each user can view.

Task Map: Reports and Output Processes

This diagram maps tasks for reporting and output processes, both by the approximate order they occur (top-left to bottom-right) and by the organizational area that performs them.



Task Map: Reports and Output Processes

Concepts and Terms: Reports and Output Processes

Asynchronous Process

A process that runs independently (in the background) of other processes. Other processes may be started before the asynchronous process has finished.

Bound Query

A query that is connected to an output process definition and cannot be overridden at runtime.

Driver Business Object

A business object that validates, at runtime, that a selected query will be able to drive an output process; for example, a driver business object for a report would create the required index.

Object

Self-contained element that consists of instructions to manipulate data; for example, a business object or query object.

Output Device

Method through which a user views the results of an output process; for example, a computer screen, printer, or PDF file.

Output Format

Format in which the data resulting from an output process displays; for example, comma-delimited, tab-delimited, Excel, HTML, MS Word, or XML.

Output Process

Process-oriented task; for example, a report, MS Word merge, or query.

Parameter

User-supplied value that dynamically customizes output. A parameter can be hard-coded or specified at runtime.

For example, a query that outputs the registrants for a closed event could require the user to supply the event code at runtime.

Process Definition

Set of runtime-specific instructions used to execute an output process.

For example, to create a report process definition you must specify a report template, associate a data source (query), determine the output destination, and specify any parameters necessary to guide the process execution.

Synchronous Process

A process that runs as a result of another process being completed.

Template

A document that dictates the format and/or style of the output of a process definition. Many templates are designed through third-party packages, which are tightly integrated with the iMIS output processing system to produce high-quality output; for example, Microsoft Word documents, email text files, and report file formats.

Creating output processes

Tips for creating output processes

Use output process templates for best efficiency. Some templates are designed through third-party packages which integrate with iMIS, such as Microsoft Word documents. Most output processes allow you to define and save the template while you build the process itself.

Before you begin

Before you create an opportunity output process, make sure Process Mgr is set up to receive it.

Process

The process to create an output process is:

1. Set up security groups.
2. Create queries and customize business objects, if not using existing queries.
3. Create templates, if not using existing templates.
4. Define output processes and set permissions.

Setting up security groups

Security groups are hard-coded in iMIS. You cannot create new security groups. You can only add one or more system-defined security groups to a user record to define general reporting access. See Security Administration.

After you create an output process, you can set permissions for that specific process. See To set user permissions for an output process.

Creating queries for output processes

The source that you should use for the query depends on the context in which the output process will be used.

Location of queries in the Document System

When defining an output process, users must browse to the appropriate query to use for the process. You should create all such queries in the $ > Common > Shared Documents folder (or one of its sub-folders) of the Document System to ensure that it will be easy to find the query when defining an output process.

Query source for Marketing output processes

You must typically define two separate output processes for marketing inserts because source codes and job segments differentiate between contacts and prospects.

- Job segments are defined as a Contact Job or as a Prospect job.
- Source codes are designated as either Contact source codes or as Prospect source codes.

To send marketing inserts to both contacts and prospects, create two different inserts:

- One insert must use an output process whose query source is the NetContact business object.
- The other insert must use an output process whose query source is the Prospect business object.

Note: You should not use CSContact or CSProspect as the query source for any output process associated with marketing inserts. Use only the NetContact or the Prospect business object as appropriate, depending on the associated source codes and job segments.

Query source for action plans in Process Mgr

In Process Mgr, the appropriate query source for an output process depends on whether the process is being used in an action plan.

- If the output process is being used in an action plan, you must use the following query sources:
- Donor action plans must use the OppDonorContact business object.
- Sales action plans must use the OppSalesContact business object.
- Member action plans must use the OppMemberContact business object.
- If the output process is not being used in an action plan, you can use any of the preceding three business objects for the query source, or you can use the NetContact business object.

  Query source for other applications

  If you are not using the query source for anything related to Marketing or Process Mgr, use the CsContact business object as a query source.

  ###### Customizing business objects

  To validate that the query selected for the output process will indeed drive the process as you expect, you may need to customize a driver business object (usually the Contact business object). See Editing an existing business object.

  ###### Using templates for output processes

  Use output process templates for MS Word merges or email merges for greater efficiency.

  To create a Microsoft Word template

  Create the basic template in Microsoft Word. Upload it and add any iMIS-based merge fields when you create the output process.

1. Open Microsoft Word.
2. Create the base text and graphics for your template.
3. Save your template to a local or network drive.
4. Close Microsoft Word.

Defining output processes

The process for defining the types of output processes (MS Word merge, email merge, opportunity) are similar. After you define the process, you can set user permissions for that process.

To define a Microsoft Word mail merge output process

Before you begin

- Ensure that you have created an appropriate query, using the appropriate business object, to use as the query for this type of output process.
- If you are creating a query through Tools > Intelligent query architect, and you want it to be visible to users through Home> Generate Reports, you must save it to Common > Reports View folder.
- Templates from iMIS 10 versions may be incompatible. If you are using new search criteria for your Microsoft Word mail merge that includes something other than date criteria, you will need to recreate your template.

1. From Tools, select Document system.
2. Navigate to (or create) the folder in which you want to create the MS Word merge process.
3. Select Organize > New > MS Word Mail Merge.
4. Define the output process:
   - In the Summary tab, enter general information.
   - In the Sources tab, browse to select the Source Data Query.
   - Leave the Template Name field blank.

   Note: If you upload an existing template or browse to a template that has been uploaded, the template will not be saved as part of the Word mail merge process and you will need to add the merge fields. It is simpler to create a new template during the output process.
5. Create a new template in Microsoft Word (these instructions are for Word 2003):

- Select Edit Template. A new Microsoft Word document appears.
- Click Word's Mail Merge toolbar or consider using the Mail Merge wizard to create the template.
- Create the letter and add merge fields using the Insert Merge Fields icon. (The merge fields are the fields from the query that is associated to the output process display.)
- Select Save, which commits the changes to the Word template.

  Note: The MS word template is embedded within the output process itself.
- (optional) Save a copy of this template outside of iMIS by selecting Save As.

6. Close Word.

   The Template Name field remains blank because the template is embedded within the process itself.
7. Execute your merge:

- From the Process Engine Portfolio, select Run.
- Select Execute Merge.

  Note: You may need to click twice to activate this control.
- View the Merge Details.
- Open Microsoft Word to review, print, or save the output.
- Close Microsoft Word.

8. Save the output process to the appropriate folder location.

   To define an email merge output process for email notifications

   You can define an email merge process in which a query provides the merge data to be combined with an email template to create the output.

   Notes

- Email merge processes should generally be stored in the $ > Common > Shared Documents > Processes folder (or one of its sub-folders) of the Document System to provide for easy access by all users working with Marketing or Process Mgr. If they are stored in any other folder, users need to navigate through the Document System folder hierarchy to locate the process.
- You must associate a query that contains a field with the email addresses of the recipients and the sources for any fields you use in the email.
- The From address must be a valid email address.
- You can also define email merge processes directly from the Processes tab of any Insert definition window in Marketing.

  Before you begin

  Ensure that you have created an appropriate query, using the appropriate business object, to use as the query for this type of output process. See Creating queries for output processes in iMIS Reference Reporting and Sample Reports for more information.

1. From Tools, select Document system.
2. Navigate to (or create) the folder in which you want to create the email merge process.
3. Select New > Email Merge.

   The Define window appears.
4. On the Security page, enter access information.
5. On the Define page, specify the email template:

- On the Summary tab, define general attributes.
- On the Sources tab, In the Associated Query area, choose whether the associated query should be:
- Bound – a specific query is always used with the process. For email messages to be sent automatically when a stage is passed during a certification program, you want to choose

Bound.

- Select at Runtime – user selects the query each time the process runs.

6. In the Query area, click … , then use the Document System browser to select the bound or default Query. The query results determine the email addresses of the recipients and the variables that are allowed in the body of the email template.

- In the Recipient List area, click Edit to specify which column in the query results contains the email address for the recipients.

  Note: This area is disabled until a query is chosen. If you specify the Select at runtime option for the Associated Query, you will not be able to specify the column for the recipient email address information until the email merge process is run.

- (optional) Enter the text for the From and Subject fields and specify whether they can be modified at runtime.
- Select the Email Format.

  Note: You must specify HTML if the body of the Email Template will contain an opt-out code. Opt-out codes in a PlainText or Multi_Part_Mime email will not direct recipients to the proper URL.

- In the Email Template area, enter the body of the message, using the following techniques:
- Insert text variables in the format [businessObjectName.columnName]. Only columns that are present in the query results will be properly substituted at runtime.
- To insert an opt-out code, insert a link to %OPTOUTURL%. From the Type drop-down list, select Other and click OK.
- (optional) Browse to import an email template from another folder within the Document System, or click Upload to import an existing email template from outside the Document System.

Note: If you find some features of the HTML editor confusing, you can download user documentation for the editor. Some features described in this external document have not been enabled for use when defining email merge output processes.

- (optional) In the Attachment area, click … , then use the Document System browser to choose an attachment to the email message.

7. Click Save.

   Note: If your merge produces any email address duplicates, they result from the query specified in the merge.

   To define an opportunity output process

   Create an opportunity output process to generate projects or opportunities from a marketing campaign or other project. The generated opportunities are stored in the Process Manager document system.

1. From Tools, select Document system.
2. Navigate to (or create) the folder in which you want to create the email merge process.
3. Select Organize > New > Opportunity.
4. Define the opportunity:

- In the Summary tab, enter general information.
- In the Sources tab, choose whether the associated query should be:
- Bound – a specific query is always used with the process
- Select at Runtime – user selects the query each time the process is run
- Browse to select the bound or default query.

5. Click Save.

   To set user permissions for an output process

You can grant specific users and/or groups access to an individual output process from the Security tab.

1. Define an output process.
2. Select Security.
3. Select an Access option:

- Share (Everyone) – Grants everyone full control.
- Private – Grants full access to the query owner only.
- Advanced – Enables the Access Mode drop-down list and allows you to edit the access list. You can select one of the listed access areas or select Custom to select from a pre-defined list of security settings in which one or more roles and/or specific users have been granted access permissions.

4. Click Save.

Troubleshooting output processes

Email merges

The following validation errors will prevent the merge from completing correctly:

- A required field has not been populated. The message will state which required field was not supplied.
- A parameter required for the query has not been supplied. The message will state which parameter was not supplied.
- The query assigned to the output process does not contain the business objects referred to in the template.
- The template uses field names that do not correspond to a column on any of the query's sources.

A warning displays for each record for which no email address can be found (by searching through the To field).

MS Word merges

Error messages about missing components can prevent the merge from completing correctly, so ensure that all of these components are installed on the web server or workstation:

- Microsoft Word (or Office)
- Microsoft .NET Framework
- Microsoft interop assemblies

Tip: See System requirements to be sure you are installing supported versions.

Creating and modifying reports

Two reporting applications are available to help you create, manage, and deliver reports:

- Crystal Reports
- SQL Server Reporting Services

Default report templates are supplied with iMIS. The administrator or manager can modify these reports to meet your organization's needs.

To create a custom report

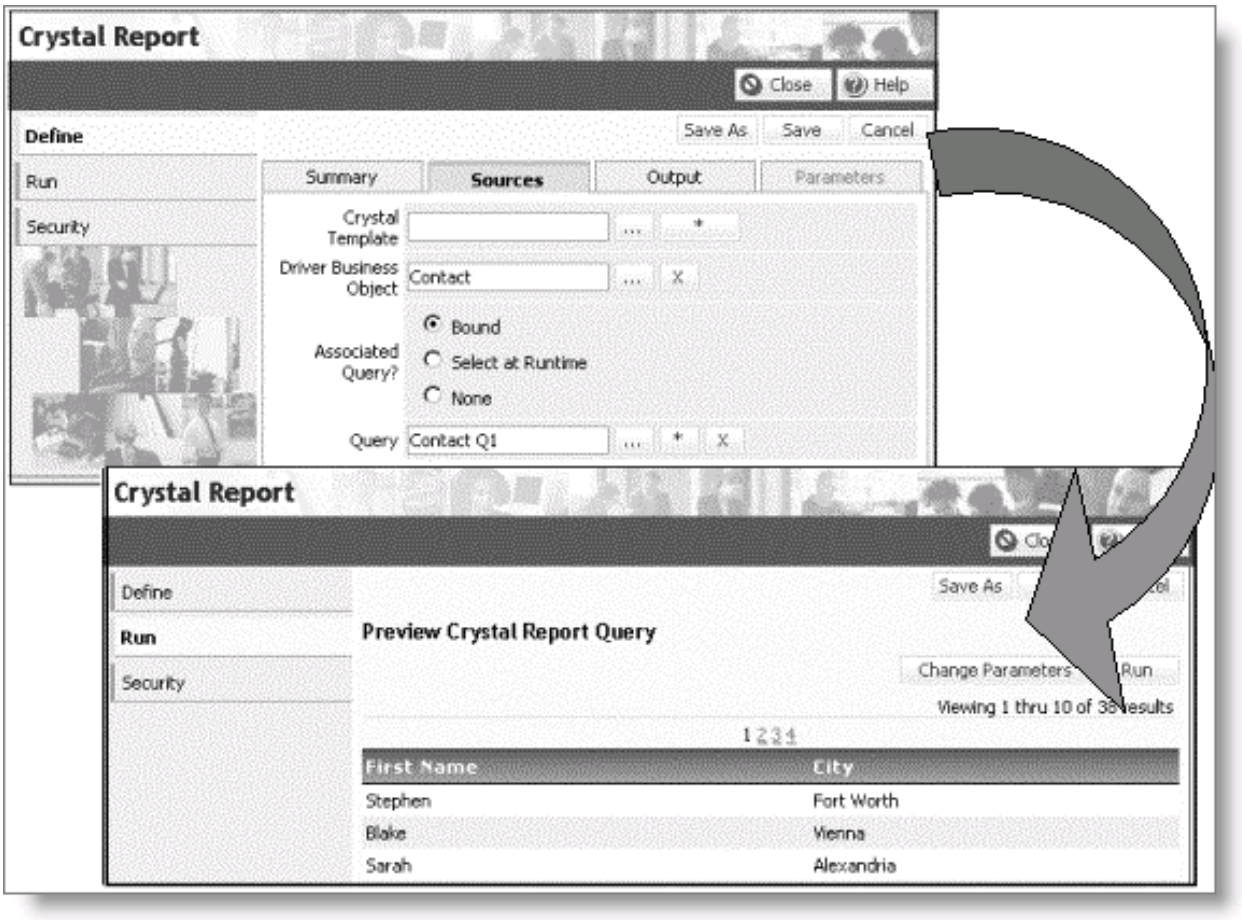
If you need custom reports that are not similar to the default reports, have your administrator:

1. Create a custom report.
2. Specify an associated query, as needed.
3. Define runtime information (such as adding parameters), as needed.
4. Store the report in an appropriate location in the Document System.

The manager, if granted access, has the ability to modify the report.

About Crystal Reports

Standard Crystal reports are supplied with iMIS. The administrator or manager can modify these reports to meet your organization's needs.



Example of a Crystal report definition and its output

If you need custom reports that are not similar to the standard reports, the administrator creates the custom report. The manager, if granted access, still has the ability to modify the report.

Process

The process to set up a Crystal report is:

1. Create or modify a Crystal report template.
2. Create a Crystal report output process.

To modify an individual Crystal report, change the associated output process.

Crystal Report Templates

The following default report templates can often be modified to meet your organization's needs:

- Mailing labels
- Invoices
- Badges
- Rosters
- AR/Cash Batch report
- AR/Cash Trial Balance
- Customer Profile
- Dues Renewal Notice
- Event Registration Confirmation
- Order Status
- Donor Profile
- Gift Receipt
- Campaign Performance
- Process Management Action report
- Process Forecast

To create a Crystal report template

1. From Tools, select Document System.
2. Navigate to (or create) the folder in which you want to create the report template.
3. Select Organize > New > Crystal Report Template.
4. Browse to the Crystal report (.rpt file) you want to save as a template.

5. (optional) Enter a Description.
6. Click Upload.

To create a Crystal report output process

Before you begin

Before you create a Crystal report output process, set up a Crystal report template (.rpt file). See To create a Crystal report template.

To create a Crystal report output process

1. From Tools, select Document System.
2. Select Organize> New> Crystal Report.
3. The Process Engine Portfolio displays.
4. Set up the report:

- In the Summary tab, enter general information.
- In the Sources tab, upload or browse to the desired Crystal Template.
- (optional) In the Sources tab, define or select the query, if any, to be associated with the report and select the type:
- Bound – The specific query is always associated with this report.
- Select at runtime – User accepts the default query or selects another one when ready to run the report.
- None
- If you select an associated query for the report, browse to the desired Driver Business Object.
- In the Output tab, specify the output options, such as print location and settings. Specify whether these options can be changed by the user at runtime.

- (optional) In the Parameters tab, select the Show Parameters at Runtime option to request or require user input at runtime.

  Note: If you do not select the Show Parameters at Runtime option, you must provide default values for the report to execute successfully.

5. (optional) Select Security and modify the security settings for the report.
6. Click Save.

   Note: The business objects that start with a "Cs" prefix (such as CsContact, CsDonations, and so on) sometimes return more information in a Crystal report than they do in a query. For example, a report that is sourced from the CsPledges object, and which is defined to show information for only one specific fund might show the expected results when you preview the query results, but then display information for multiple funds when you run the report.

   This behavior is caused because the Cs-prefixed objects might not have primary keys in their original data source, and in one-to-many relationships the query results can differ from report results because of the way that filters are currently implemented in reports.

Running reports and output processes

Managers and users can run reports and output processes from the related iMIS area, as designated in the Document System.

Users can also start the Word merge output process from Home > Generate Reports if the lefthome.htm file has been customized to include MS Word Mail Merge.

Clearing old query results

Periodically, the interim tables used by iMIS reports and queries should be cleared of old data. You can accomplish this by running the sp_asi_ClearOldQueryResults script.

To clear old data from the query results tables

1. From Tools, select Utilities> Modify system tables.
2. A message window opens and asks you to confirm that you want to run the script, and the Run ClearOldQueryResults script window opens. Click Yes.

The script is run and the number of rows fitting the deletion criteria is reported in Run ClearOldQueryResults script window.

RiSE

RiSE is the cloud-based web engagement platform of iMIS 20 with multiple out-of-the box, Quick-Start Sites organizations can quickly launch, tailor, and create new.

- Manage member data and web content together
- Tailor all web pages for staff and members
- Customize mobile websites
- Dynamic content translates into website engagement
- Personalized engagement experience

RiSE is the flexible and powerful DNA of iMIS 20.

- Content Gallery|topic=iPart Reference for customized web pages
- Share content on Facebook, Twitter, YouTube, LinkedIn, and more
- Easy edit keeps content up-to-date – with a simple click
- Quickly and easily position information anyplace on your website

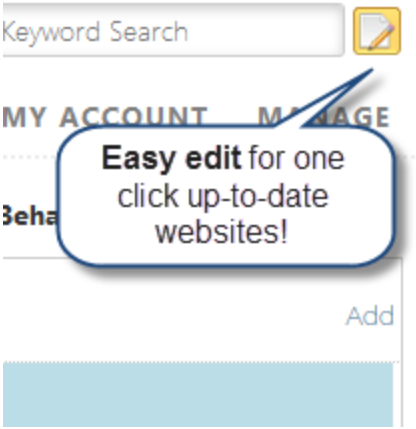
  Quick Start Sites

  RiSE includes plenty of out-of-the-box website templates full of features for quickly launching your websites – or microsites for your branches, committees, and events. With RiSE mobile sites, relatable and relevant info is at your members' fingertips. See Creating a site.

- Staff
- Member
- Member Mobile

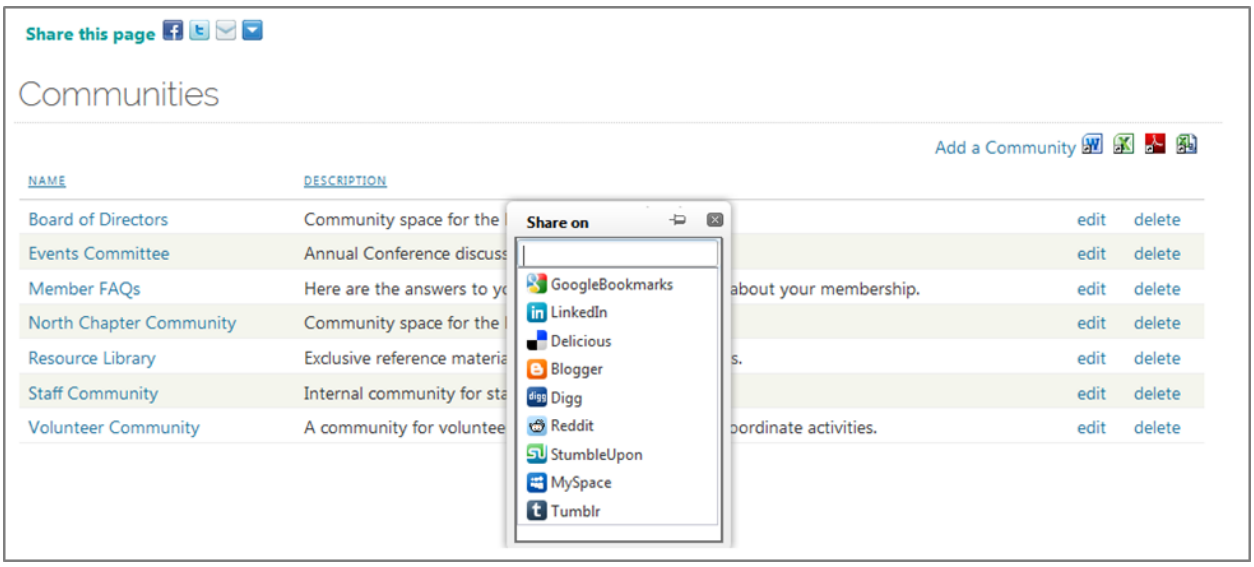
- Donor
- Annual Conference
- Annual Conference Mobile

All of your content can be quickly refreshed and updated with Easy edit. And with RiSE, power users and non-technical staff can easily maintain your web pages.



Support for social networks

With ready to use building blocks for online Communities, RiSE contributes to significant peer-to-peer relationships.

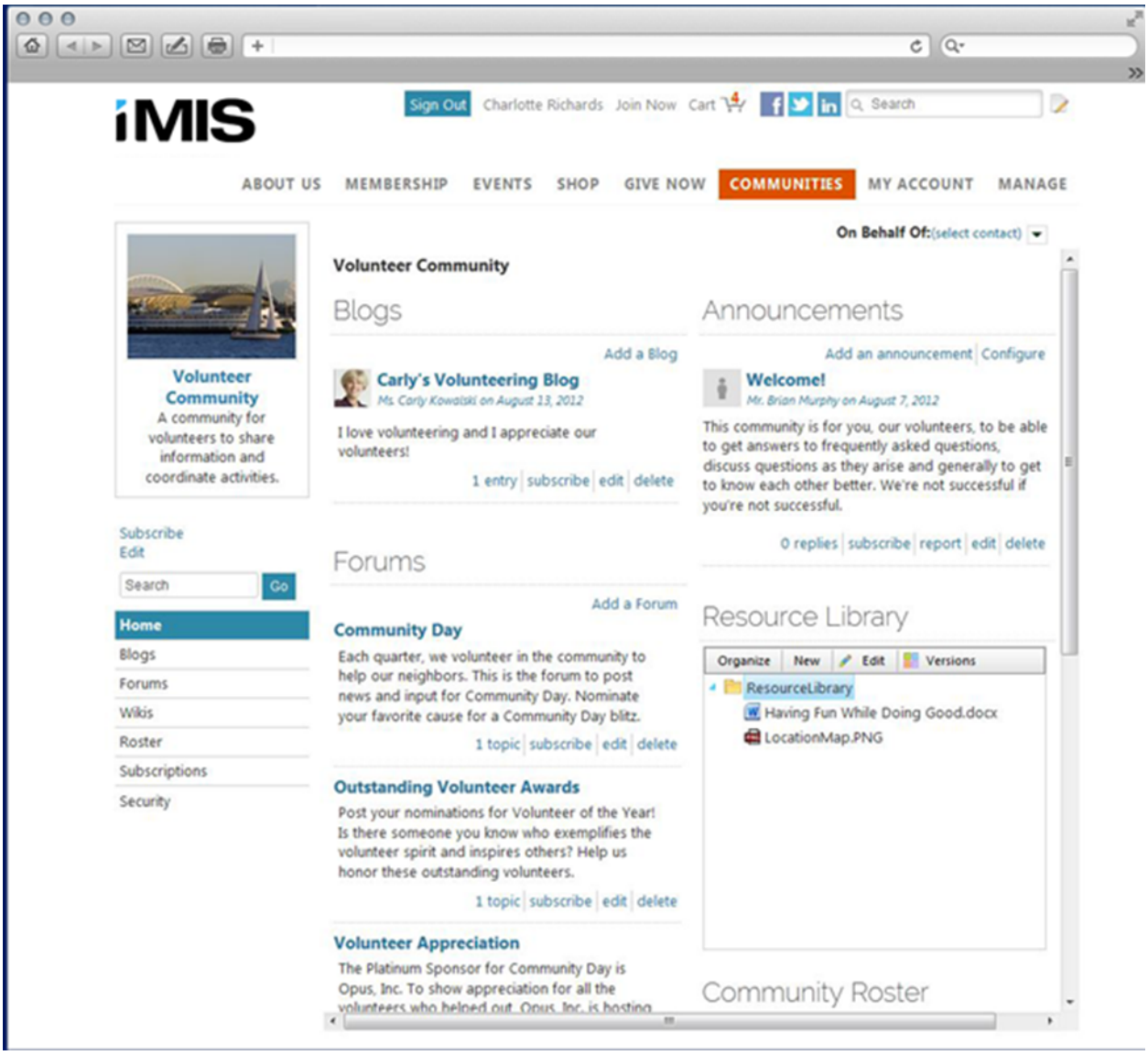


- Convenient forums to discuss best practices and other valuable member topics
- Members can easily connect organization info to other popular sites
- Private network features
- Social engagement is content for your websites – place it anywhere, anytime

  Content Gallery

  The RiSE platform includes a gallery of widgets and savvy (easy-to-use) tools to customize existing iMIS self-service pages, as well as create entirely new personalized web pages to meet the rapidly-changing expectations of your members.

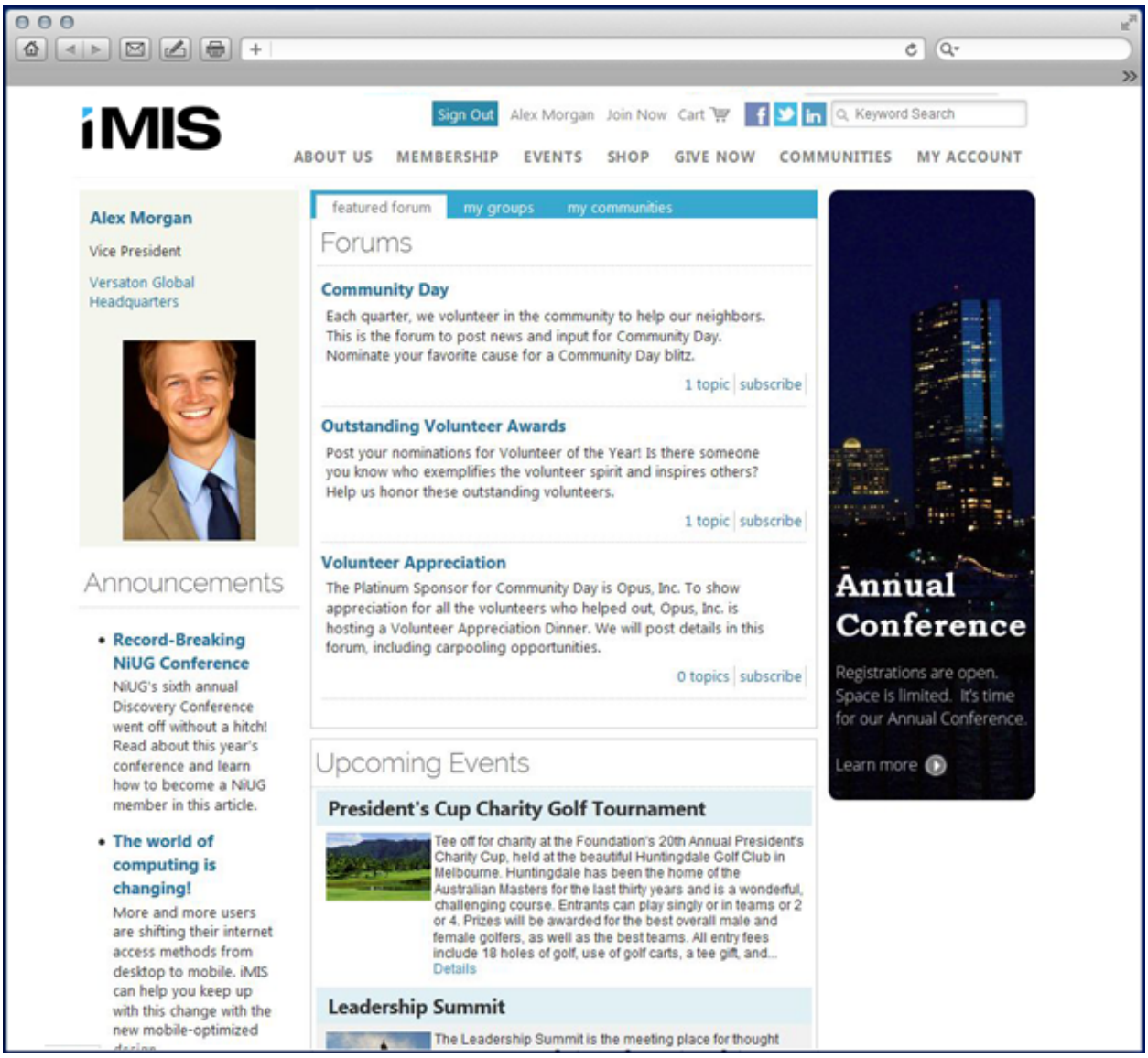
  Members share products, events, fundraising, campaigns, and content from your website with popular social media sites.



- Tailor promotions to individual members and constituents
- Up-to-date progress on fundraising efforts – right on the donations page
- Up-to-date info about your membership base

  RiSE thinks!

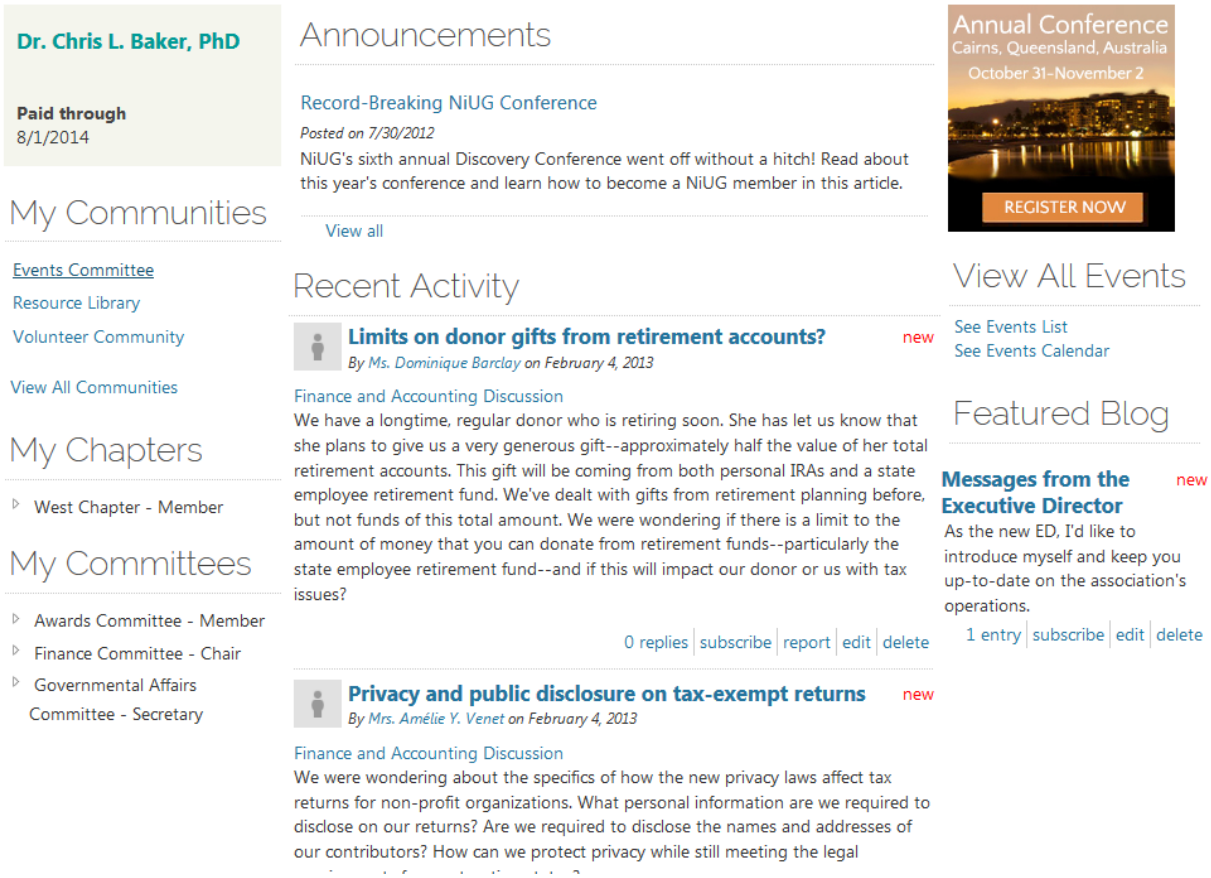
- Create personalized, self-service experiences for your members on the cloud



Member content transformed

Your constituents have preferences – one member likes white papers, another is a fan of multiple communities. With RiSE, those preferences translate into personalized, engaging visits to your websites.

iMIS



- Communities organized by audience
- Private communities inspires engagement between members
- Previous interest delivers tailored content on subsequent visits
- Blogging enhances familiarity and sense of community
- Data store for document exchange

RiSE plugs in!

- Maintain your current CMS while leveraging the power of RiSE
- Easily publish dynamic content from iMIS and content from other sources

More on RiSE

Organization websites

- Quick Start Sites, tailored, or newly created, organizations use RiSE for creating their web and micro sites. Tie in themes, or keep them unique; it is the organization's choice with RiSE on where and how content is displayed.
- Non-technical staff can edit web page content with browser-based editing tools; targeted according to an organization's terms, audiences, and concepts.
- Ease in use and navigation
- Users can subscribe to communities
- Community members can share documents
- Create communities by member type
- Users can create titles for documents and set documents as hot or normal
- New documents automatically tag as new
- Creates folders to store documents
- Ability to create an unlimited number of forums per community
- Users can respond to discussion threads by username – or anonymously
- Administrators can monitor and delete unwanted posts
- Users can choose when to receive forum posts from communities

Fundraising

- Dashboard of up-to-date fundraising efforts
- Easily process recurring donations
- Seamlessly manage Gift Aid
- Enter multiple gifts
- Highly visible Give Now option

Events

- Intuitive online registration
- Allow members to register others in their organization
- Displays calendar of events
- Organizations can define type and number of guests a registrant can sign up
- Ability to change each type of guest to a different rate
- Registrant can create badges for guests
- Special pricing
- Multiple forms of payment
- Automatically update Events module
- Automatically verify funds via authorized gateway
- Staff can configure online event information
- Provides HTML-based e-mail notifications

Commerce

- Amazon-like online shopping experience
- Displays quick view of current items in shopping cart
- Accepts multiple forms of payment
- Asks customers to authenticate credit card
- Automatically updates iMIS Orders
- Verifies funds via authorized gateway
- Unified checkout basket so that all transactions (dues, events, products) can be purchased at one time

- Offers multiple pricing strategies (member/non-member, quantity discounts, and flat rates)

  Continuum

- Multiple report options provide valuable content for your website
- Charts and graphs; query and query displays

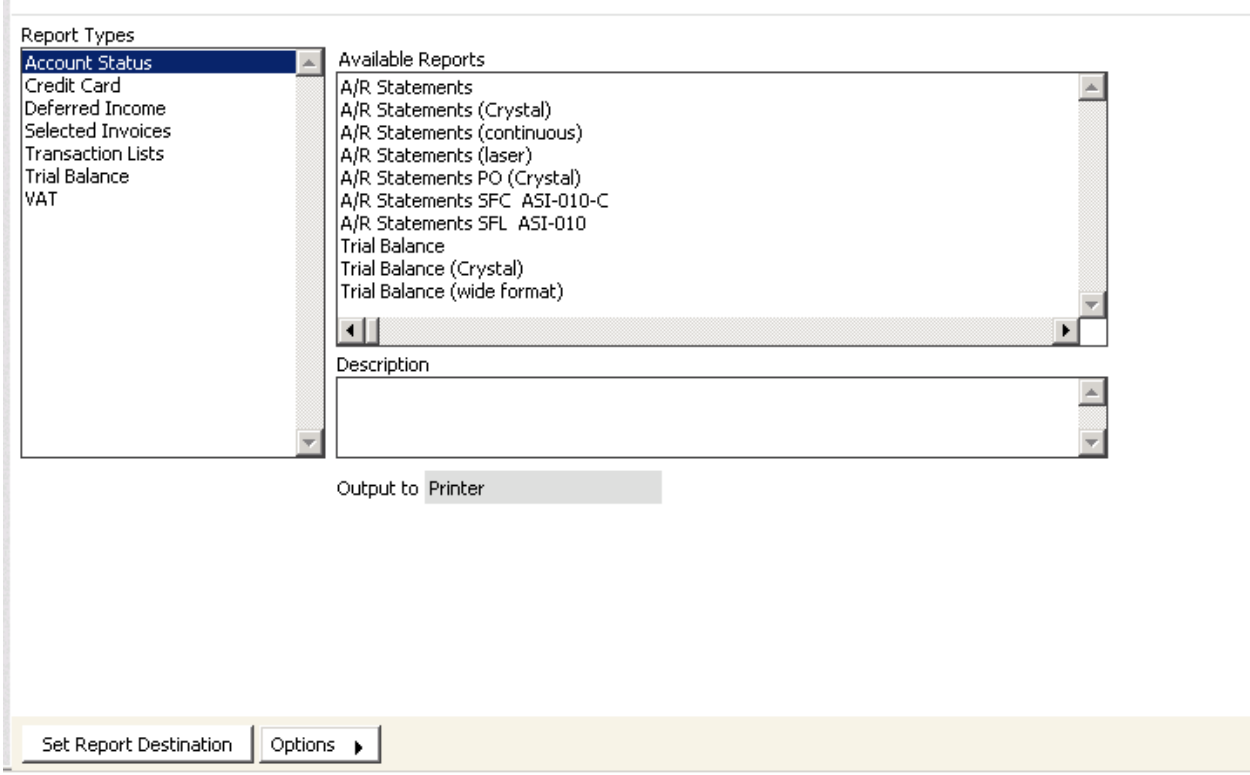
  Content Manager

- Allows non-technical users to post content and maintain websites
- Assigns roles for contributors and approvers
- Automatically sets data to post, archive, or remove
- Ability to publish website once content is approved
- Allows one piece of content to be displayed in multiple places by using categories/tags
- Consistent look and feel of websites through the use of templates
- Allows contributors to assign additional attributes to content
- Creates security keys to make data available by login only

Sample Reports

Reports for Accounting

Accounting reports window



Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports
Desktop: AR/Cash > Generate reports

The following reports are the most frequently used in Accounting, and are often used on a daily basis:

- On-screen account inquires
- Accounting Transaction reports
- Accounting Transaction journal
- Accounting Statements reports
- Trial Balance reports

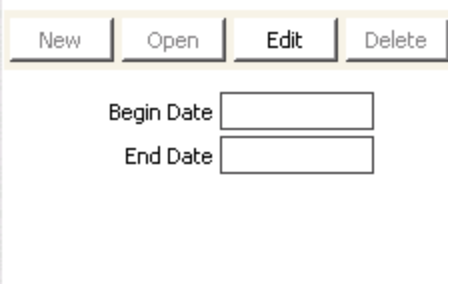
- Deferred Income reports
- Selected Invoices reports
- Credit/Debit Card Authorization reports

To view on-screen account inquiries

Perhaps the most important inquiry tool you will use is located in the customer's record. For example, if a customer asks for instant information on the status of an account item, you can immediately open screens that show overall and detailed data on open items.

1. From Accounting reports, find a customer's record.
2. The name and address data for the selected customer displays on the Manage customers window.
3. Select the AR/Cash tab.
4. Double-click on a line item to display the transaction details on the Transaction Ledger window.
5. Click OK.
6. Click Print Trial Balance on the AR/Cash tab. The system automatically generates a Trial Balance report for the specified customer ID.

Print transaction journal window



Admin Console: Accounting > Processes > Print transaction journal
Desktop: AR/Cash > Print Transaction Journal

The Print Transaction Journal window includes the following fields:

Begin Date

Enter the beginning date for the AR transactions to be printed.

End Date

Enter the ending date for the AR transactions to be printed.

Print button

Click to print the AR transactions for the specified date range.

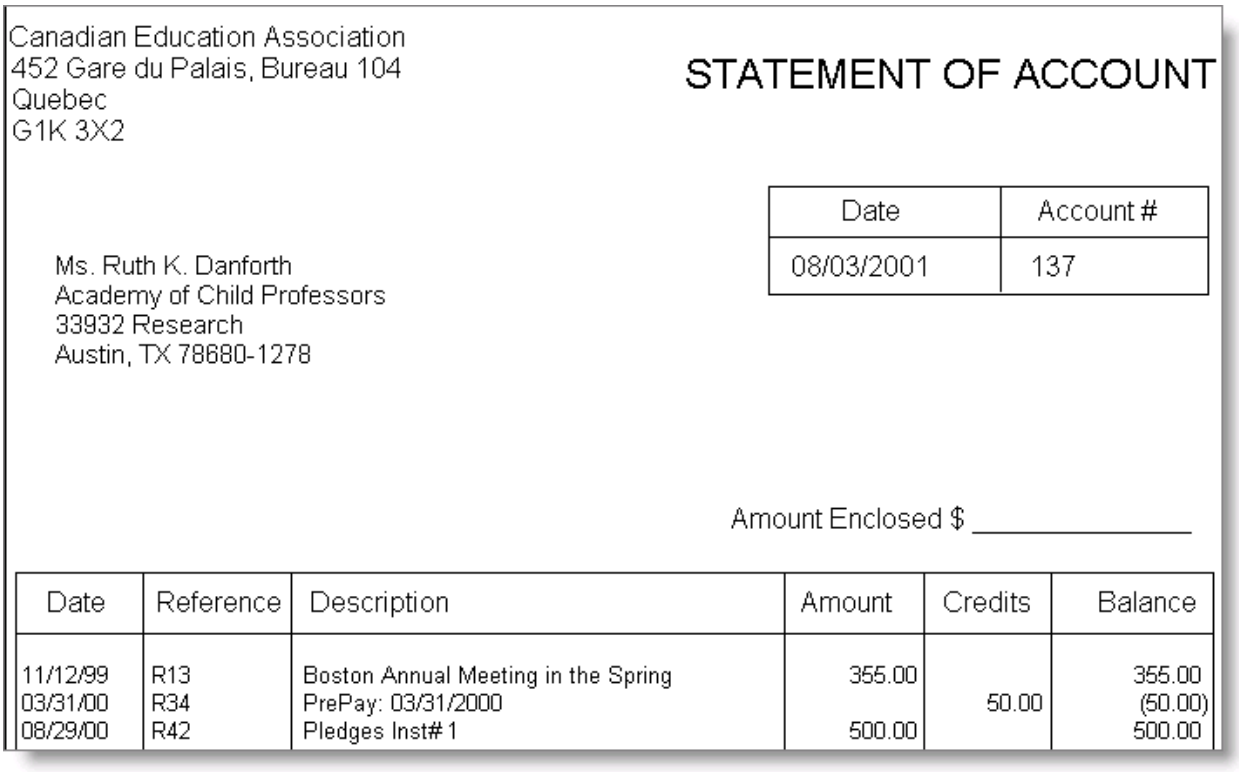
After specifying a date range and clicking Print, the Transaction Recap, Debit Memo Journal, Revenue-Sales Journal, and Payments Journal reports are printed.

Sample Accounting Reports

Account Status - AR Statements report

The AR Statements report produces a Statement of Account for any customer that has an outstanding balance. The search features on the A/R Statements dialog window determine the range of information printed on the report.

The statements print on plain paper designed for laser printers. The statements list all open items in the body and provide an aged summary at the bottom of the report. Depending on the age of an open account, you have the option of a pre-configured message at the bottom of the report that lines up with text entered on the AR/Cash Set up module window (from AR/Cash, select Set up module). The AR Statements reports are primarily used for sending reminders out to customers who are overdue in paying one or more invoices.



Canadian Education Association
452 Gare du Palais, Bureau 104
Quebec
G1K 3X2

STATEMENT OF ACCOUNT

Date	Account #
08/03/2001	137

Ms. Ruth K. Danforth
Academy of Child Professors
33932 Research
Austin, TX 78680-1278

Amount Enclosed $ _____

Date	Reference	Description	Amount	Credits	Balance
11/12/99	R13	Boston Annual Meeting in the Spring	355.00		355.00
03/31/00	R34	PrePay: 03/31/2000		50.00	(50.00)
08/29/00	R42	Pledges Inst# 1	500.00		500.00

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > A/R Statements (Crystal)

Desktop: AR/Cash > Generate reports > Account Status > A/R Statements (Crystal)

Account Status - Selected Invoices report

Invoice reports are frequently used to verify the accuracy of a billing run and to see which customers or subscribers have not paid.

The invoice printing process prints the invoice and generates the related accounting transactions to record the sales. Because orders cannot be modified after they are invoiced, the printing process represents the final step in the order processing cycle.

Selected Invoices
as of May 31st, 2002

Advanced Solutions International, Inc.

Page 1

Date / Id	Invoice/Ref	System/Type / Company/Name	Description	Charges / Member Type	Credits	Balance
09/21/1999 166	R28	EXPO International Medico	Medical Exposition 2000	4,050.00 CM	1,012.50	3,037.50
09/21/1999 101	R29	EXPO Prodigy Makers International	Medical Exposition 2000	4,050.00 CM	1,012.50	3,037.50
09/21/1999 180	R30	EXPO Brown & Brown	Medical Exposition 2000	4,025.00 CM	1,006.25	3,018.75
11/12/1999 156	R10	MEETING Mr. Peter L. Bachman, American Business Services	Boston Annual Meeting in the Spring	210.00 M	210.00	0.00
11/12/1999 121	R11	MEETING Spybreakers Ltd.	Boston Annual Meeting in the Spring	250.00 CM	250.00	0.00
11/12/1999 155	R12	MEETING American Business Services	Technology Expo	170.00 CM	170.00	0.00

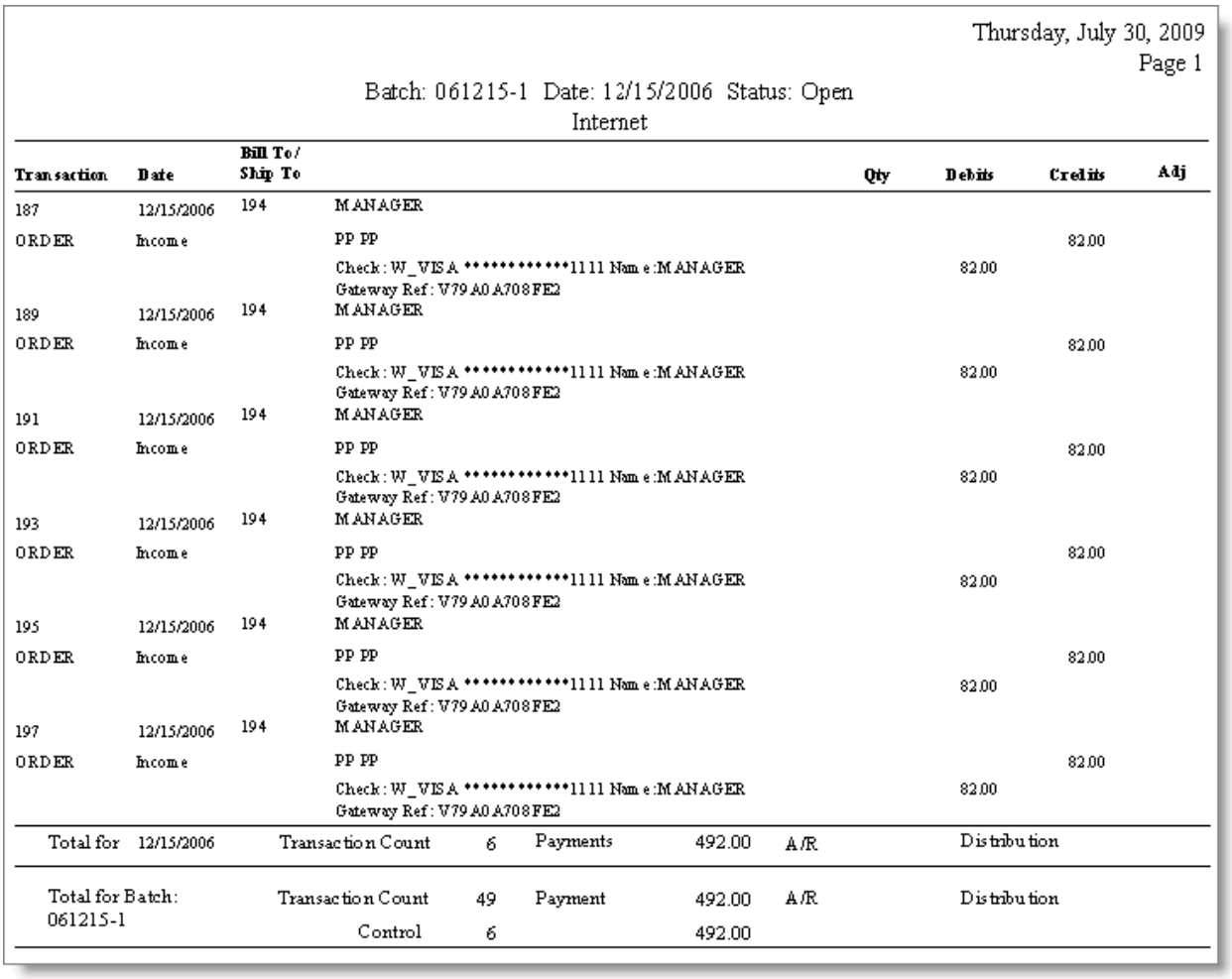
Admin Console: Continuum > Commerce and Customer Service Reports > Accounting Reports > Selected Invoices
Desktop: AR/Cash > Generate reports > Selected Invoices

BatchControlPrint - Batch Report

The Batch report shows a list of all European debit card transactions for the selected date range. Run this report from:

Admin Console: Accounting > Processes > Manage batches: select a batch and Print
Desktop: AR/Cash > Manage Batches: select a batch and Print

> **Note:** Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Thursday, July 30, 2009
Page 1

Batch: 061215-1 Date: 12/15/2006 Status: Open
Internet

Transaction	Date	Bill To/ Ship To		Qty	Debits	Credits	Adj
187	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
189	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
191	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
193	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
195	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		
197	12/15/2006	194	MANAGER				
ORDER	Income		PP PP			82.00	
			Check: W_VISA **********1111 Name:MANAGER Gateway Ref: V79A0A708FE2		82.00		

Total for	12/15/2006	Transaction Count	6	Payments	492.00	A/R	Distribution
Total for Batch: 061215-1		Transaction Count	49	Payment	492.00	A/R	Distribution
		Control	6		492.00		

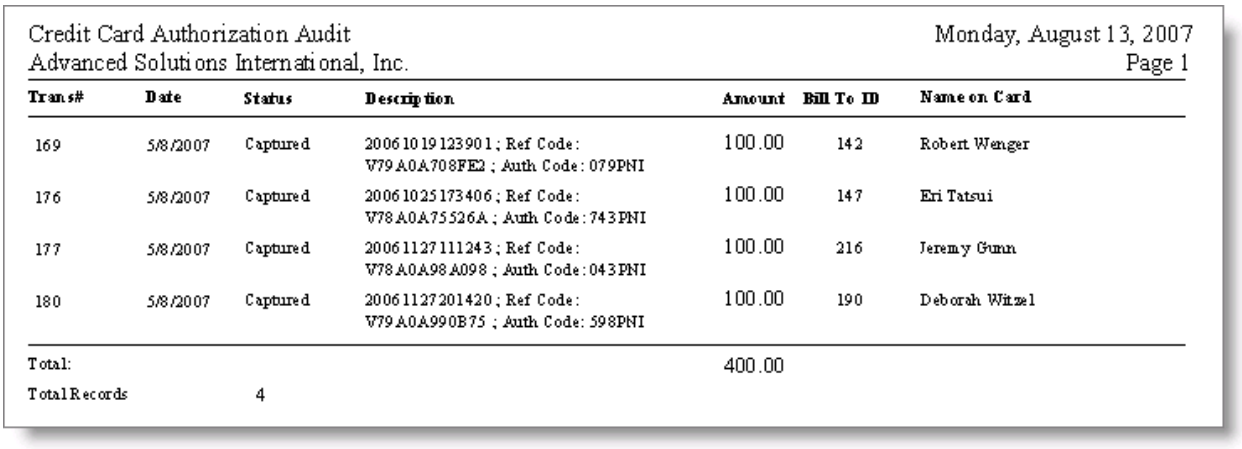
Batch Report

Credit Card Authorization Audit report

This report prints a list of all credit card transactions that were authorized within the given date range and/or Org Code. You can use this report to compare with the results of queries you receive from your gateway provider. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > Credit Card > Credit Card Authorization Audit (Crystal)
Desktop: AR > Generate Reports > Credit Card > Credit Card Authorization Audit (Crystal)

Note: Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Credit Card Authorization Audit
Advanced Solutions International, Inc.

Monday, August 13, 2007
Page 1

Trans#	Date	Status	Description	Amount	Bill To ID	Name on Card
169	5/8/2007	Captured	20061019123901; Ref Code: V79A0A708FE2; Auth Code: 079PNI	100.00	142	Robert Wenger
176	5/8/2007	Captured	20061025173406; Ref Code: V78A0A75526A; Auth Code: 743PNI	100.00	147	Eri Tatsui
177	5/8/2007	Captured	20061127111243; Ref Code: V78A0A98A098; Auth Code: 043PNI	100.00	216	Jeremy Gunn
180	5/8/2007	Captured	20061127201420; Ref Code: V79A0A990B75; Auth Code: 598PNI	100.00	190	Deborah Witzel
Total:				400.00		
Total Records		4				

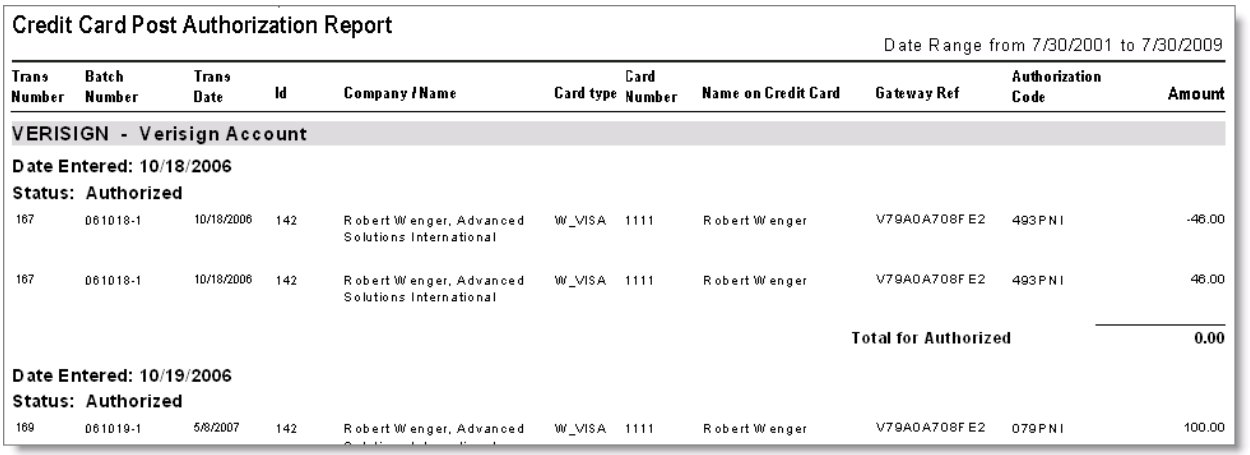
Credit Card Authorization Audit report

Credit Card - Credit Card Post Authorization report

The Credit Card Post Authorization report shows a list of all credit card transactions for the selected date range. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting Reports > Credit Card > Credit Card Post Authorization Report (Crystal)
Desktop: AR/Cash > Generate Reports > Credit Card

Note: Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Credit Card Post Authorization Report

Date Range from 7/30/2001 to 7/30/2009

Trans Number	Batch Number	Trans Date	Id	Company / Name	Card type	Card Number	Name on Credit Card	Gateway Ref	Authorization Code	Amount
VERISIGN - Verisign Account										
Date Entered: 10/18/2006										
Status: Authorized										
167	061018-1	10/18/2006	142	Robert Wenger, Advanced Solutions International	W_VISA	1111	Robert Wenger	V79A0A708FE2	493PNI	-46.00
167	061018-1	10/18/2006	142	Robert Wenger, Advanced Solutions International	W_VISA	1111	Robert Wenger	V79A0A708FE2	493PNI	46.00
								Total for Authorized		**0.00**
Date Entered: 10/19/2006										
Status: Authorized										
169	061019-1	5/8/2007	142	Robert Wenger, Advanced	W_VISA	1111	Robert Wenger	V79A0A708FE2	079PNI	100.00

Credit Card Post Authorization Report

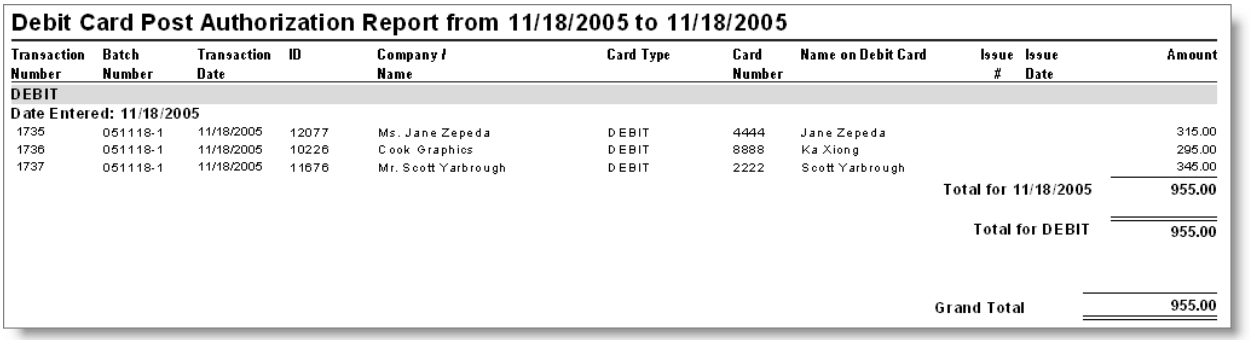
Credit Card - Debit Card Post Authorization report

The Debit Card Post Authorization report shows a list of all European debit card transactions for the selected date range. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > Credit Card > Debit Card Post Authorization Report (Crystal)

Desktop: AR/Cash > Generate Reports > Credit Card

> **Note:** Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Debit Card Post Authorization Report from 11/18/2005 to 11/18/2005

Transaction Number	Batch Number	Transaction Date	ID	Company / Name	Card Type	Card Number	Name on Debit Card	Issue #	Issue Date	Amount
DEBIT										
Date Entered: 11/18/2005										
1735	051118-1	11/18/2005	12077	Ms. Jane Zepeda	DEBIT	4444	Jane Zepeda			315.00
1736	051118-1	11/18/2005	10226	Cook Graphics	DEBIT	8888	Ka Xiong			295.00
1737	051118-1	11/18/2005	11676	Mr. Scott Yarbrough	DEBIT	2222	Scott Yarbrough			345.00
									Total for 11/18/2005	**955.00**
									Total for DEBIT	**955.00**
									Grand Total	**955.00**

Debit Card Post Authorization Report

Debit Reconciliation - Debit Card Reconciliation report

Added for FRIO DT_69 Include BT ID and BT Name on credit card reports. mcr 8/15/07

The Debit Card Reconciliation report shows a list of all European debit card transactions for the selected time frame, sorted by batch and transaction number. Run this report from:

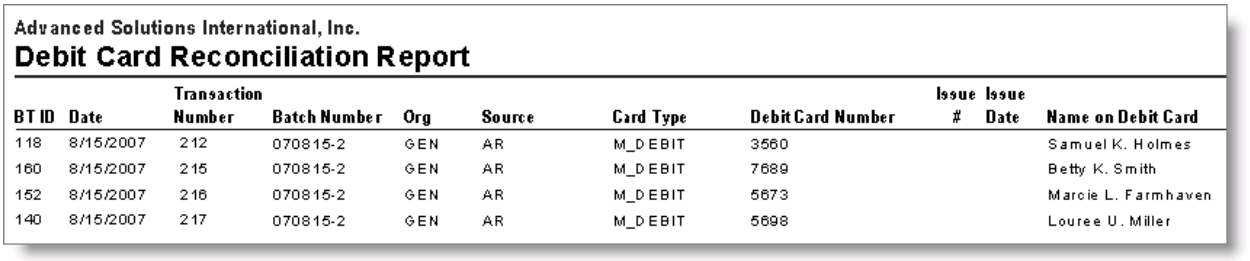
Admin Console: Continuum > Commerce and Customer Service Reports > Credit card reports > Print Debit Card Reconciliation Report

Desktop: AR/Cash > Credit Card Reporting > Credit Card Reports > Print Debit Card Reconciliation Report

Troubleshooting

- The Print Debit Card Reconciliation Report button is only available if you have defined a credit card authorization gateway and a cash account for debit cards.
- To return results, you need to select a batch with at least one debit card transaction. Otherwise, the report is empty.

> **Note:** Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



Advanced Solutions International, Inc.

Debit Card Reconciliation Report

BT ID	Date	Transaction Number	Batch Number	Org	Source	Card Type	Debit Card Number	Issue #	Issue Date	Name on Debit Card
118	8/15/2007	212	070815-2	GEN	AR	M_DEBIT	3560			Samuel K. Holmes
160	8/15/2007	215	070815-2	GEN	AR	M_DEBIT	7689			Betty K. Smith
152	8/15/2007	216	070815-2	GEN	AR	M_DEBIT	5673			Marcie L. Farmhaven
140	8/15/2007	217	070815-2	GEN	AR	M_DEBIT	5698			Louree U. Miller

Debit Card Reconciliation report

Deferred income reports

Several summary and detail level reports let you review the status of deferred income. Go to AR/Cash > Generate reports > Deferred Income:

- Deferred Income Analysis/Spread
- Deferred Income Audit Trail (Crystal)
- Deferred Income Detail (Crystal)
- Deferred Income Matrix Summary (Crystal)

  Deferred Income Analysis/Spread (see "Deferred Income - Deferred Income Analysis/Spread report (Crystal)")

  Provides a projection of how the current balances in deferred income will be recognized in each future period. This is an important management report.

  Deferred Income Audit Trail (Crystal)

  Provides a report on the income that was recognized, as well as the deferred income balance that remains at the end of the reporting period. This report is designed to run for a specific monthly period (any month for which the GL interface has already been run). The report is designed as an audit trail report to simulate the income that was recognized, as well as the deferred income balances that remain at the end of the reporting period.

  > **Note:** Note: This report is generated using the specified End Date. Only transactions equal to or less than the report's End Date are included. It is important to always enter the last day of the month.

  This report is based on deferred income transactions for which the deferral/recognition timeframe is still in effect as of the beginning of the month being reported on (residual income is yet to be recognized either during the report month and/or in a future month).

  This report simulates the process that iMIS uses to generate the deferral to income transfer entries with one exception. It depicts the income recognition at the individual detail transaction level, as opposed to the matrix summary level that iMIS uses to generate the actual entries. As a result, the reported income amounts will most likely be different from the actual amounts by small rounding differences. Nonetheless, the report should give a

close approximation of the actual transfer amounts per month as well as the residual balance at the end.

This report is structured as follows:

- The report is based on all transactions dated on or before the reporting end date that have been posted to the deferred income matrix.
- The transactions are grouped, sorted, and subtotaled by the four key deferral matrix elements (deferral account, income account, begin date, and term).
- For identification and cross reference, the Trans #, Trans Date, Bill To ID, Bill To Name, and Product code are listed.
- The transaction amount is listed and subtotaled at the matrix summary level. This subtotal should agree with the original amount on the Deferred Income Matrix Summary report as of the end date of the report (the sign is shown as positive instead of the normal credit balance for easier use of the report).
- For each detail line, the monthly transfer column will show the portion of the income that should have been transferred during the reporting month. In most cases, if the begin date is equal to or less than the reporting period, this will be the transaction amount divided by the term, with appropriate rounding. In some cases, the amount may be more if the transaction date falls within the reporting date and the deferral begin date was within an earlier period. In this case, iMIS works in a catch-up mode on income that needs to be recognized by the reporting date. If the reporting period is the last period within the deferral term, the amount may be smaller or larger to account for any cumulative rounding differential. The transfer amount is summarized at the matrix level and is also subtotaled for each income account. The actual transfer amount can be compared to the total income from transfer for the reporting period.

  Note: If the actual transfer amount differs substantially from the report amount, this may be due to timing issues where the income for certain transactions was not recognized because a future month's GL interface was processed before the affected transactions were processed through an interface cycle.

- The Months Remaining in the deferral term beyond the reporting month is shown for each transaction.
- The deferred income Amount Remaining is shown at the individual transaction level, matrix summary level, and the Total amount by the deferred GL account. It can be compared to the GL balance and/or the Deferred Income Matrix Summary report as of the end of the reporting month. Again, due to the detail basis of the report, this balance will only be an approximation, which may be off by a rounding difference.

  Deferred Income Detail (Crystal)

  Provides a report of transactions to be posted to deferred income. Transactions are sorted by deferred income account, regular income account, beginning date, and term. This report should be printed prior to running the GL interface procedure. Verify the accuracy of the data and make modifications as needed before running the GL interface.

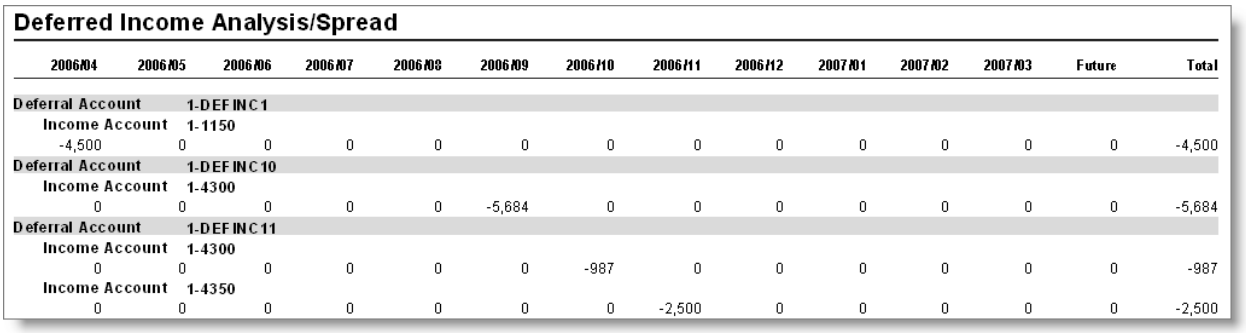
  Deferred Income Matrix Summary (Crystal)

  Provides a current status of the deferred income matrix table and shows the totals that were originally posted to deferred income, how much has been recognized to date, and the amount that remains to be recognized in future months. This report should be printed after each GL interface. The remaining amounts should tie to the deferred income balances in the General Ledger. Save this report and use it as a backup for deferred income transfer entries.

Deferred Income - Deferred Income Analysis/Spread report (Crystal)

The Deferred Income Analysis/Spread report (Crystal) provides a projection, sorted by deferral account, of how the current balances in deferred income will be recognized over the next twelve months. It also summarizes all amounts projected beyond one year in the Future column, and shows the total of all deferred amounts in the Total column.

Note: Note: The total deferred amount equals Original Amount - Amount Transferred - Amount already realized.



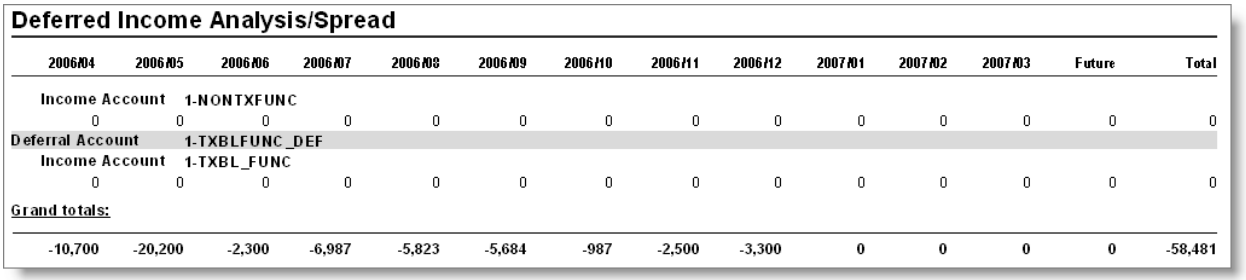
Deferred Income Analysis/Spread

2006/04	2006/05	2006/06	2006/07	2006/08	2006/09	2006/10	2006/11	2006/12	2007/01	2007/02	2007/03	Future	Total
Deferral Account 1-DEFINC1													
Income Account 1-1150													
-4,500	0	0	0	0	0	0	0	0	0	0	0	0	-4,500
Deferral Account 1-DEFINC10													
Income Account 1-4300													
0	0	0	0	0	-5,684	0	0	0	0	0	0	0	-5,684
Deferral Account 1-DEFINC11													
Income Account 1-4300													
0	0	0	0	0	0	-987	0	0	0	0	0	0	-987
Income Account 1-4350													
0	0	0	0	0	0	0	-2,500	0	0	0	0	0	-2,500

Deferred Income Analysis/Spread

The report is sorted by the deferral account, and then by the income account. The report ends with the grand totals of each column's entries. Run this report from:

Admin Console: Accounting > Commerce and Customer Service Reports > Accounting reports > Deferred Income
Desktop: AR/Cash > Generate reports > Deferred income



Deferred Income Analysis/Spread

2006/04	2006/05	2006/06	2006/07	2006/08	2006/09	2006/10	2006/11	2006/12	2007/01	2007/02	2007/03	Future	Total
Income Account 1-NONTXFUNC													
0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferral Account 1-TXBLFUNC_DEF													
Income Account 1-TXBL_FUNC													
0	0	0	0	0	0	0	0	0	0	0	0	0	0
Grand totals:													
-10,700	-20,200	-2,300	-6,987	-5,823	-5,684	-987	-2,500	-3,300	0	0	0	0	-58,481

Deferred Income Analysis/Spread totals

MenuTransJournal - AR/Cash Transactions report

The AR/Cash Transactions report runs the following reports:

- Credit Memo Journal - This report groups together adjusting transactions that typically reduce or reverse income, such as credit memo transactions entered in AR/Cash, Billing (from adjusting accrual dues invoices), Fundraising, and Order Entry (from invoicing Credit Memo type orders).
- Debit Memo Journal - This report groups together adjusting transactions that typically increase income, such as debit memo/adjustment transactions entered in AR/Cash, Billing (from adjusting accrual dues invoices), Fundraising, and Order Entry (from

invoicing debit memo type orders).

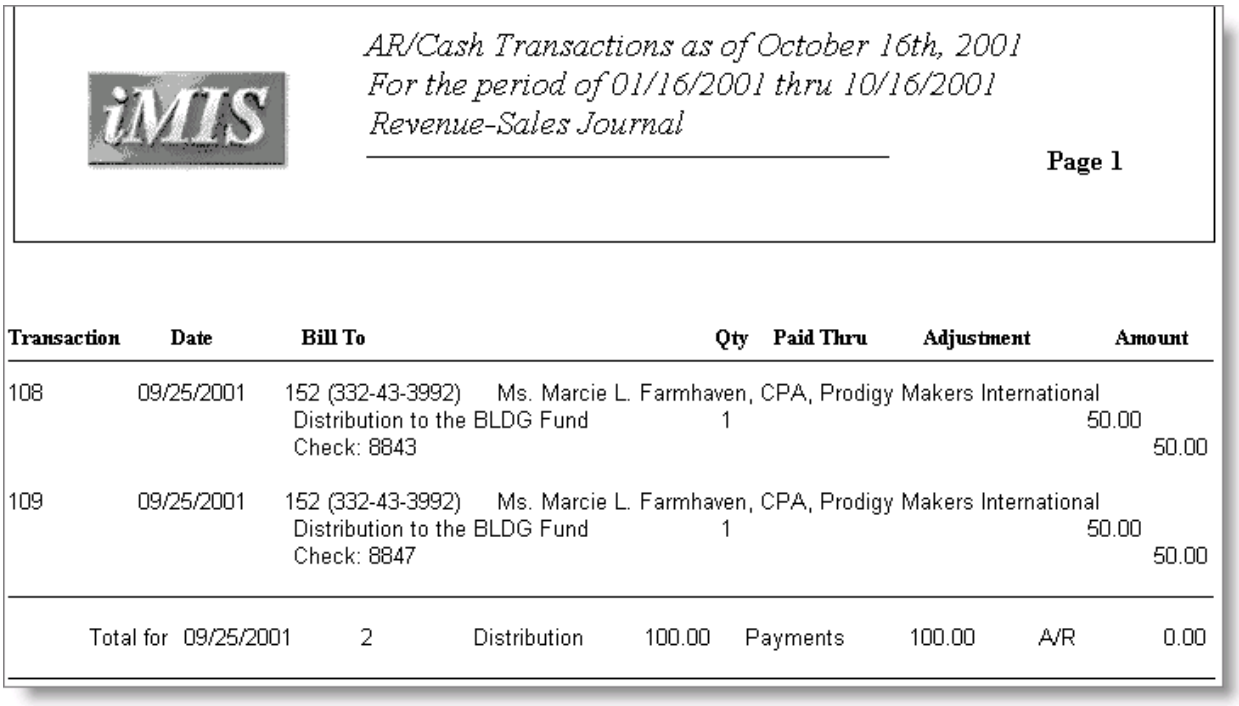
- Payments Journal - This report focuses primarily on cash receipt transactions, such as those entered in the (AR/Cash) Enter and edit cash receipts, (Billing) Enter and edit payments, (Fundraising) Process payments, and (Service Central) Enter and edit payments windows.
- Refund Journal - This reported provides information on transactions generated as a result of refunds issued from AR/Cash (from AR/Cash, select Process month-end procedures, click Credit Invoices, select one or more credit invoices, and click Issue Refunds).
- Revenue-Sales Journal - This report provides a detailed audit trail of all AR/Cash transactions entered through AR/Cash.
- Transaction Recap - This report provides an accounting summary showing the net effect of the transactions.

  These documents do not include transactions generated through other modules, such as Events.

  > **Note:** Note: If you have batch control enabled (from AR/Cash, select Set up module, and click Batch Control) print your transaction journal from the Manage batches window (from AR/Cash, select Manage batches). You can also select batch-specific printing options on the Manage batches window.

  The detail journal separates transactions by type. Transactions entered on the Enter and edit sales transactions window (from AR/Cash, select Enter and edit transactions> Sales transactions) print with summary totals followed by a page break before printing transactions entered on the Enter and edit cash receipts window (from AR/Cash, select Enter and edit transactions> Cash receipts).

  > **Note:** Note: Remember to select the output destination (printer, screen, file, and so on) before you generate this journal.



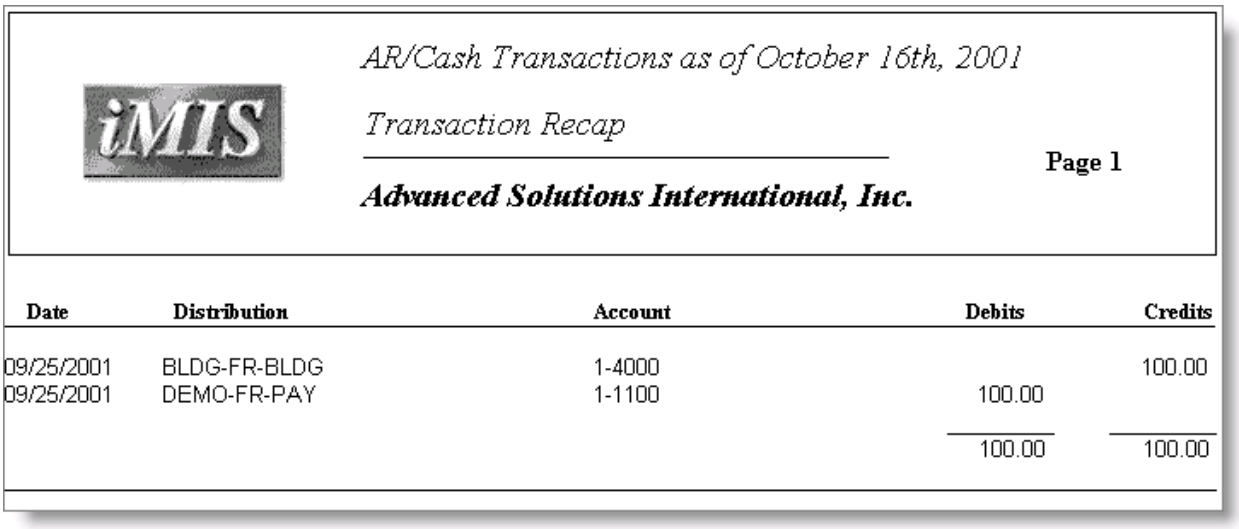
AR/Cash Transactions as of October 16th, 2001
For the period of 01/16/2001 thru 10/16/2001
Revenue-Sales Journal

Page 1

Transaction	Date	Bill To	Qty	Paid Thru	Adjustment	Amount
108	09/25/2001	152 (332-43-3992) Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International				
		Distribution to the BLDG Fund	1			50.00
		Check: 8843				50.00
109	09/25/2001	152 (332-43-3992) Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International				
		Distribution to the BLDG Fund	1			50.00
		Check: 8847				50.00

Total for 09/25/2001	2	Distribution	100.00	Payments	100.00	A/R	0.00

The Transaction Journal - Revenue Sales-Journal



AR/Cash Transactions as of October 16th, 2001

Transaction Recap

Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
09/25/2001	BLDG-FR-BLDG	1-4000		100.00
09/25/2001	DEMO-FR-PAY	1-1100	100.00	
			100.00	100.00

The Transaction Journal - Transaction Recap

Note: Note: The AR Cash Transactions (Crystal) report prints as two different pages on the same report. Use the scroll feature on the Print window to view Transaction Recap.

Reconciliation - Credit Card Reconciliation report

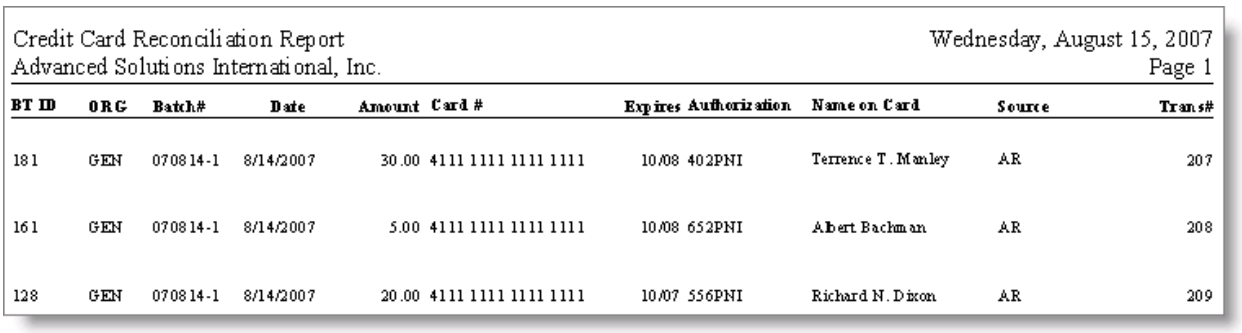
The Credit Card Reconciliation report shows a list of all credit card transactions for the selected batch, sorted by BT ID and Org code. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Credit card reports > Print Credit Card Reconciliation Report
Desktop: AR/Cash > Credit Card Reporting > Credit Card Reports > Print Credit Card Reconciliation Report.

Troubleshooting

- The Print Credit Card Reconciliation Report button is only available if you have defined a credit card authorization gateway and a cash account for credit cards.
- To return results, you need to select a batch with at least one credit card transaction. Otherwise, the report is empty.

> **Note:** Note: If Advanced PCI Compliance > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.



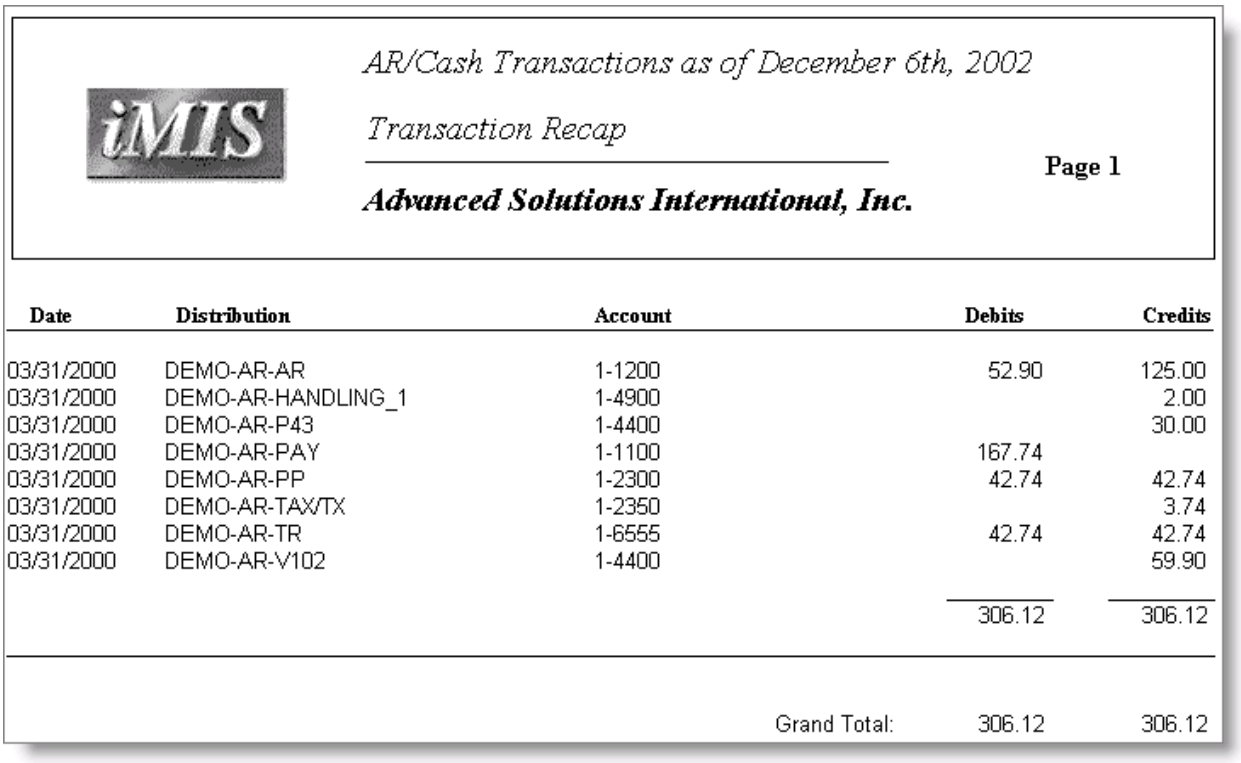
Credit Card Reconciliation Report
Advanced Solutions International, Inc.
Wednesday, August 15, 2007
Page 1

BT ID	ORG	Batch#	Date	Amount	Card #	Expires	Authorization	Name on Card	Source	Trans#
181	GEN	070814-1	8/14/2007	30.00	4111 1111 1111 1111	10/08	402PNI	Terrence T. Manley	AR	207
161	GEN	070814-1	8/14/2007	5.00	4111 1111 1111 1111	10/08	652PNI	Albert Bachman	AR	208
128	GEN	070814-1	8/14/2007	20.00	4111 1111 1111 1111	10/07	556PNI	Richard N. Dixon	AR	209

Credit Card Reconciliation Report

Transaction Journal report

The AR/Cash task list includes the Print Transaction Journal task list item, which allows you to specify a date range and print all AR transactions.



AR/Cash Transactions as of December 6th, 2002

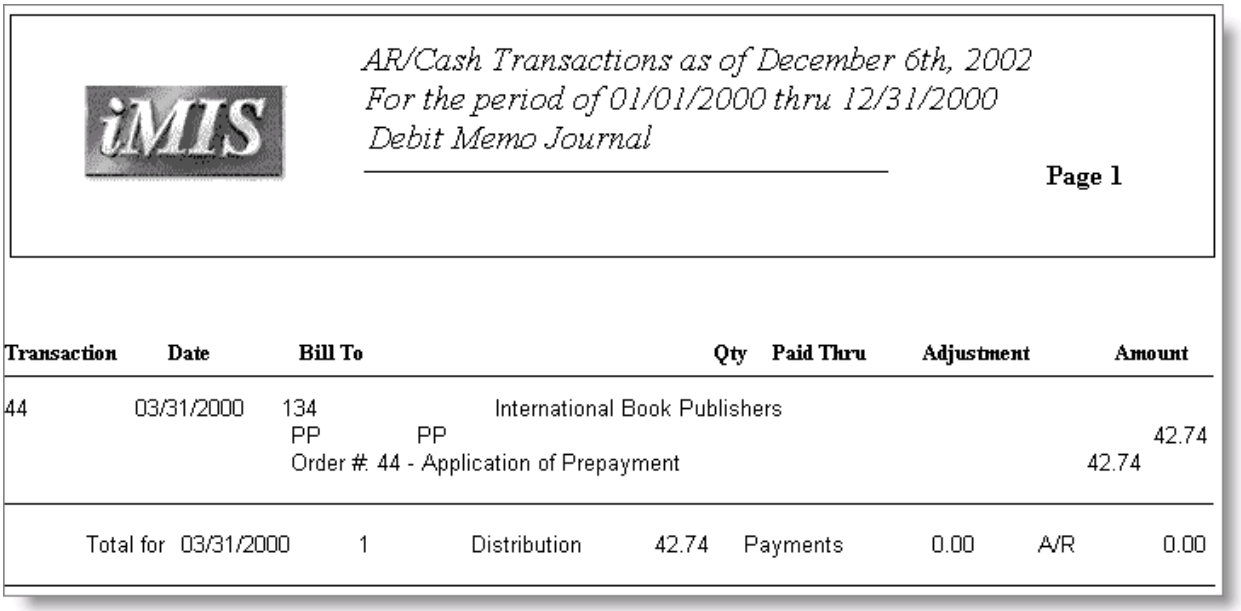
Transaction Recap

Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
03/31/2000	DEMO-AR-AR	1-1200	52.90	125.00
03/31/2000	DEMO-AR-HANDLING_1	1-4900		2.00
03/31/2000	DEMO-AR-P43	1-4400		30.00
03/31/2000	DEMO-AR-PAY	1-1100	167.74	
03/31/2000	DEMO-AR-PP	1-2300	42.74	42.74
03/31/2000	DEMO-AR-TAX/TX	1-2350		3.74
03/31/2000	DEMO-AR-TR	1-6555	42.74	42.74
03/31/2000	DEMO-AR-V102	1-4400		59.90
			306.12	306.12
		Grand Total:	306.12	306.12

Transaction Recap report

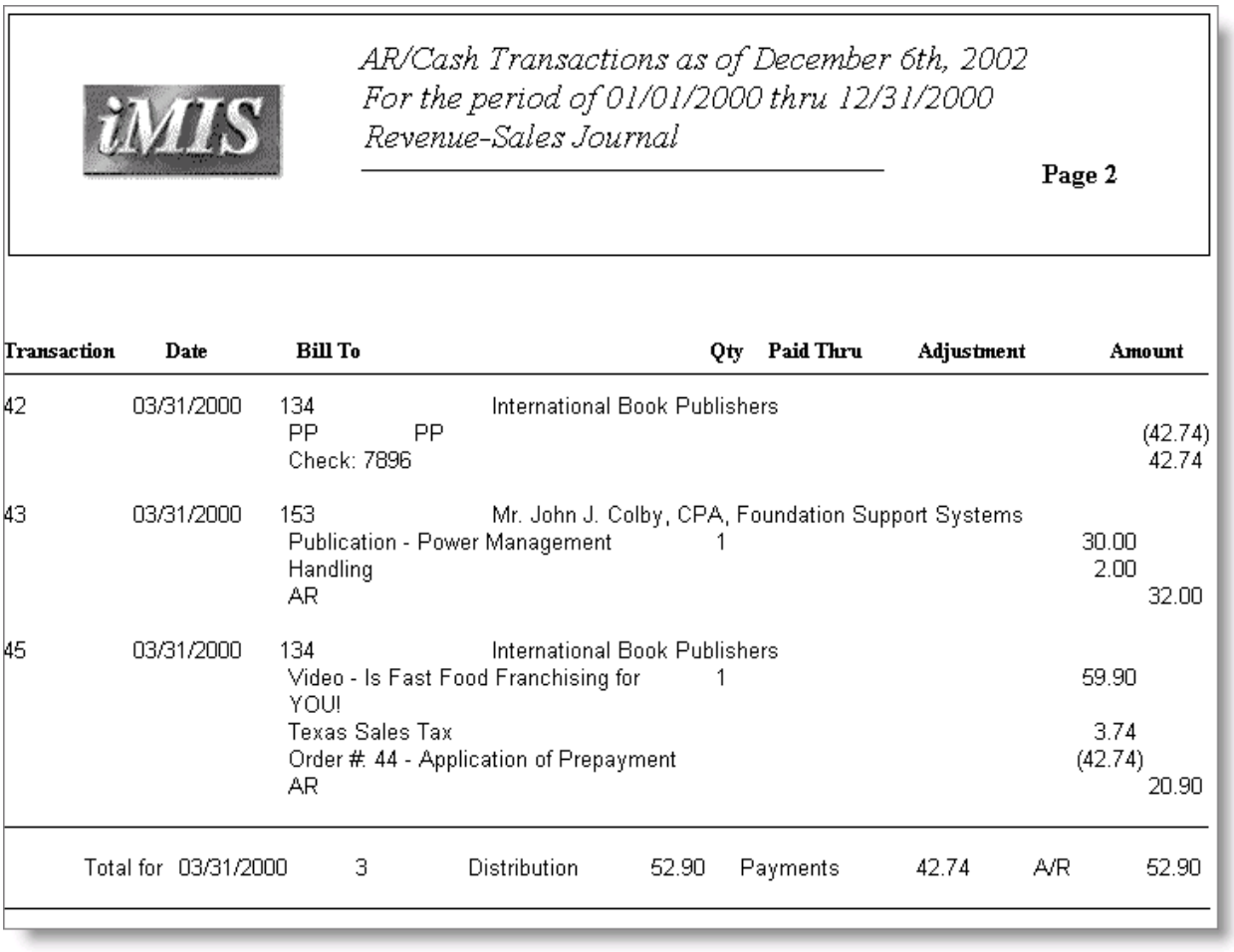


AR/Cash Transactions as of December 6th, 2002
For the period of 01/01/2000 thru 12/31/2000
Debit Memo Journal

Page 1

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment	Amount
44	03/31/2000	134	International Book Publishers				
		PP	PP				42.74
		Order #: 44 - Application of Prepayment				42.74	
Total for 03/31/2000		1	Distribution	42.74	Payments	0.00	A/R 0.00

Debit Memo Journal report



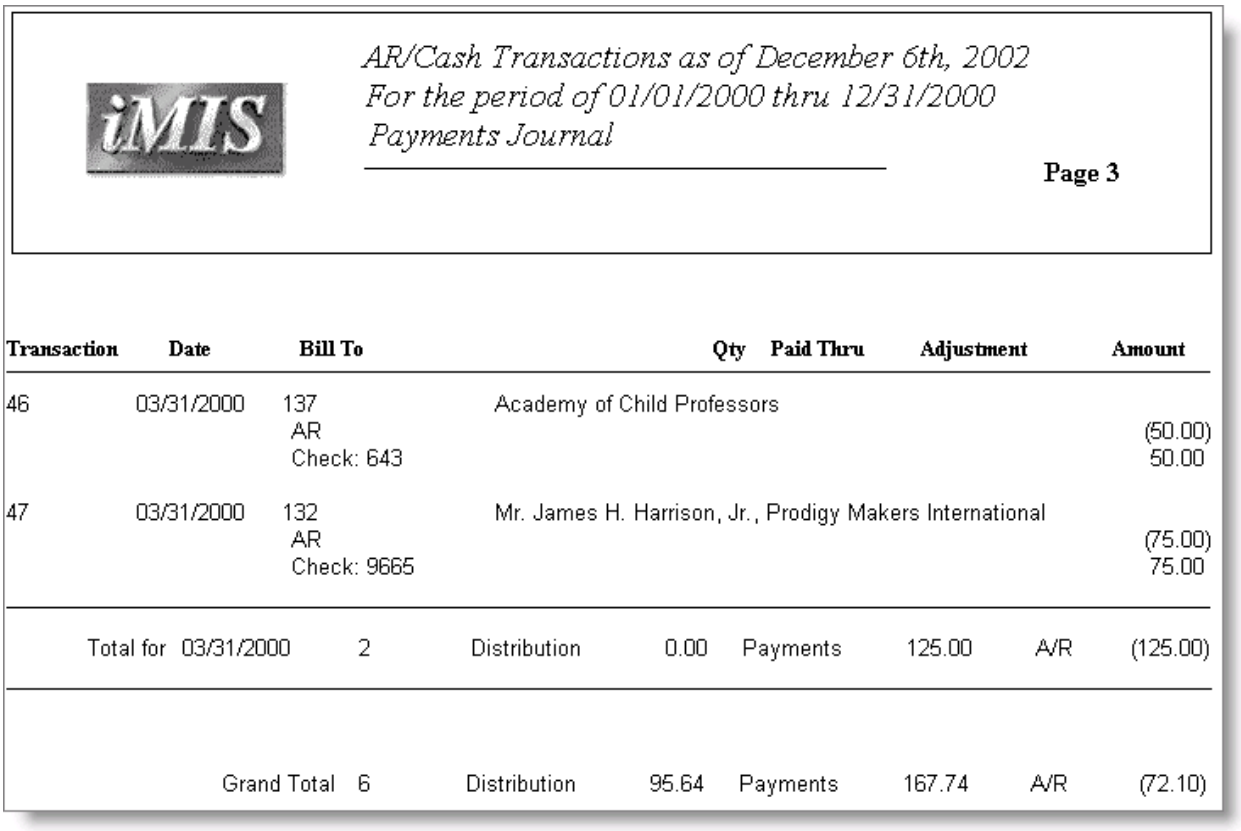
AR/Cash Transactions as of December 6th, 2002
For the period of 01/01/2000 thru 12/31/2000
Revenue-Sales Journal

Page 2

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment	Amount
42	03/31/2000	134	International Book Publishers				
		PP PP					(42.74)
		Check: 7896					42.74
43	03/31/2000	153	Mr. John J. Colby, CPA, Foundation Support Systems				
		Publication - Power Management		1		30.00	
		Handling				2.00	
		AR					32.00
45	03/31/2000	134	International Book Publishers				
		Video - Is Fast Food Franchising for YOU!		1		59.90	
		Texas Sales Tax				3.74	
		Order #: 44 - Application of Prepayment				(42.74)	
		AR					20.90

Total for	03/31/2000	3	Distribution	52.90	Payments	42.74	A/R	52.90

Revenue-Sales Journal report



AR/Cash Transactions as of December 6th, 2002
For the period of 01/01/2000 thru 12/31/2000
Payments Journal

Page 3

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment		Amount
46	03/31/2000	137	Academy of Child Professors					
		AR						(50.00)
		Check: 643						50.00
47	03/31/2000	132	Mr. James H. Harrison, Jr., Prodigy Makers International					
		AR						(75.00)
		Check: 9665						75.00
Total for	03/31/2000	2	Distribution	0.00	Payments	125.00	A/R	(125.00)
Grand Total		6	Distribution	95.64	Payments	167.74	A/R	(72.10)

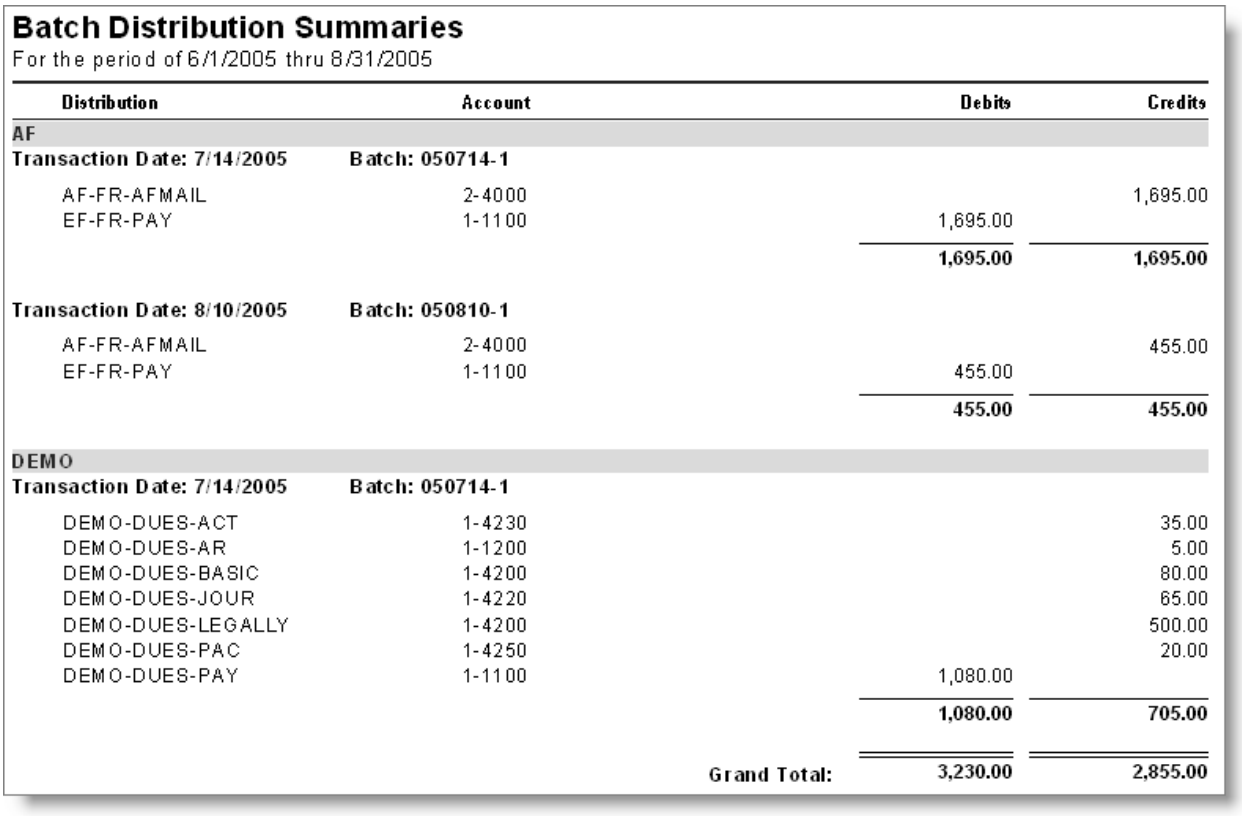
Payments Journal report

Transactions Lists - Batch Distribution Summaries report

The Batch Distribution Summaries report shows the totals for distributions and account numbers within batches, grouped by Entity. Run this report from:

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting Reports > Transaction Lists

Desktop: AR/Cash > Generate Reports > Transaction Lists



Batch Distribution Summaries
For the period of 6/1/2005 thru 8/31/2005

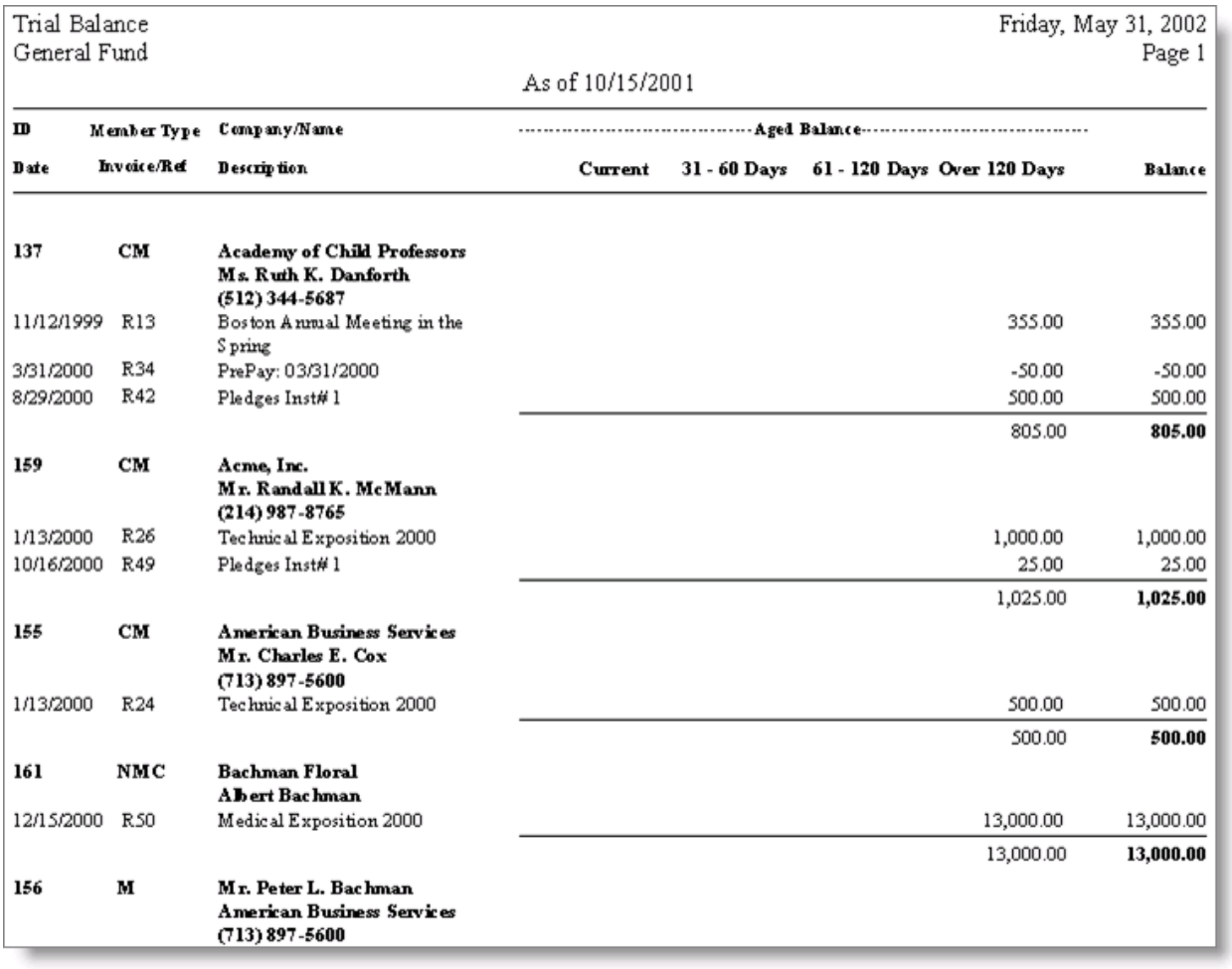
Distribution	Account	Debits	Credits
AF			
Transaction Date: 7/14/2005	**Batch: 050714-1**		
AF-FR-AFMAIL	2-4000		1,695.00
EF-FR-PAY	1-1100	1,695.00	
		1,695.00	**1,695.00**
Transaction Date: 8/10/2005	**Batch: 050810-1**		
AF-FR-AFMAIL	2-4000		455.00
EF-FR-PAY	1-1100	455.00	
		455.00	**455.00**
DEMO			
Transaction Date: 7/14/2005	**Batch: 050714-1**		
DEMO-DUES-ACT	1-4230		35.00
DEMO-DUES-AR	1-1200		5.00
DEMO-DUES-BASIC	1-4200		80.00
DEMO-DUES-JOUR	1-4220		65.00
DEMO-DUES-LEGALLY	1-4200		500.00
DEMO-DUES-PAC	1-4250		20.00
DEMO-DUES-PAY	1-1100	1,080.00	
		1,080.00	**705.00**
	Grand Total:	**3,230.00**	**2,855.00**

Batch Distribution Summaries report

Trial Balance - Trial Balance report

The Trial Balance report lists customer accounts with an open balance, and provides contact name, company name, telephone number, a line for each open item, a summary aging for each account, and a total.

The Trial Balance report is used as a collection report to locate and call overdue customers and is also a month-end accounting report used to balance the iMIS AR subsidiary ledger against the general ledger AR control account.



Trial Balance
General Fund

Friday, May 31, 2002
Page 1

As of 10/15/2001

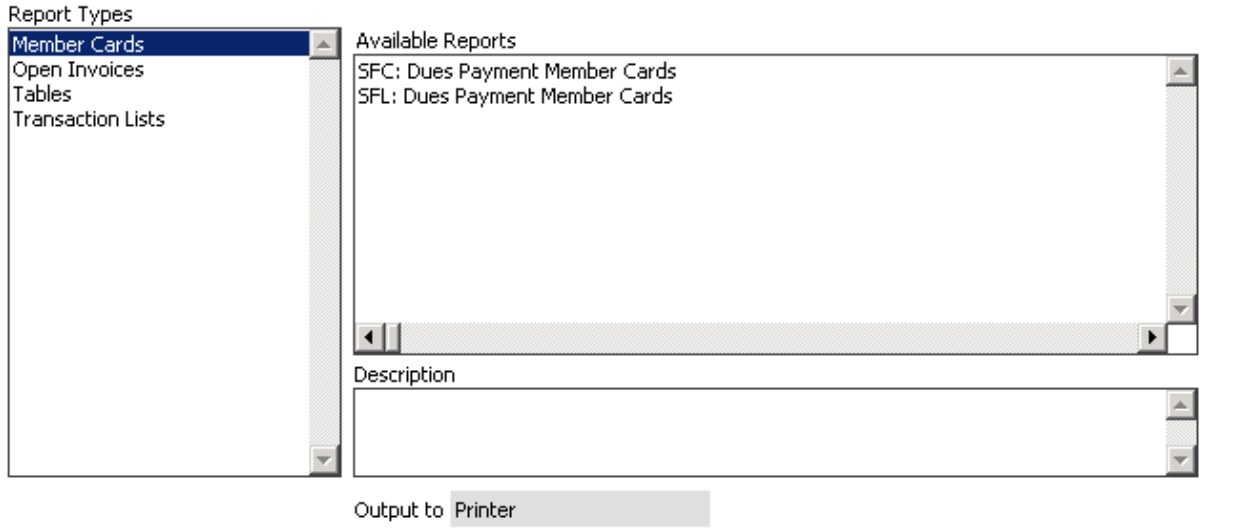
ID / Date	Member Type / Invoice/Ref	Company/Name / Description	Aged Balance: Current	31 - 60 Days	61 - 120 Days	Over 120 Days	Balance
137	**CM**	**Academy of Child Professors** **Ms. Ruth K. Danforth** **(512) 344-5687**					
11/12/1999	R13	Boston Annual Meeting in the Spring				355.00	355.00
3/31/2000	R34	PrePay: 03/31/2000				-50.00	-50.00
8/29/2000	R42	Pledges Inst# 1				500.00	500.00
						805.00	**805.00**
159	**CM**	**Acme, Inc.** **Mr. Randall K. McMann** **(214) 987-8765**					
1/13/2000	R26	Technical Exposition 2000				1,000.00	1,000.00
10/16/2000	R49	Pledges Inst# 1				25.00	25.00
						1,025.00	**1,025.00**
155	**CM**	**American Business Services** **Mr. Charles E. Cox** **(713) 897-5600**					
1/13/2000	R24	Technical Exposition 2000				500.00	500.00
						500.00	**500.00**
161	**NMC**	**Bachman Floral** **Albert Bachman**					
12/15/2000	R50	Medical Exposition 2000				13,000.00	13,000.00
						13,000.00	**13,000.00**
156	**M**	**Mr. Peter L. Bachman** **American Business Services** **(713) 897-5600**					

Admin Console: Continuum > Commerce and Customer Service Reports > Accounting reports > Trial Balance

Desktop: AR/Cash > Account Status > Trial Balance (Crystal)

Reports for Billing

Billing reports window



Admin Console: Continuum > Membership Reports > Billing reports

Desktop: Billing > Generate reports

Printing Renewal Notices

Printing Renewal Notices at the same time as billing is recommended to ensure that the only items that print on the renewal notices are the items that get billed. To do this, select both the Renewals and Initial Bill options on the Process billing window on the same billing run.

If you print the initial bill separately from billing, you must perform an ad hoc search to print only the items that were last billed. See the next section, "To print Renewal Notices separately" for more information on performing an ad hoc search to verify bill date.

> **Note:** Note: With accrual dues, the posting and finalization of mass billing data occurs after the renewal billing step, therefore, you need to print renewal notices (Initial Bill) independently after the batch posting is complete.

When you print Renewal Notices, the following field conditions are evaluated to determine if a Renewal Notice will print for a customer:

- The Paid Thru date field on the Status tab (Name.PAID_THRU) contains a date that is earlier than the Renewed Thru field on the Financial tab (Name.Fin.RENEWED_THRU) located on the Manage customers window (from Customers, select Manage customers).
- The Status field (Name.STATUS) on the Manage customers window is not set to S (Suspended), I (Inactive), or D (Marked for deletion).
- The balance for the dues product (Subscriptions.BALANCE) is greater than zero.
- Subscriptions.REMINDER_COUNT is equal to zero.

To print Renewal Notices Separately

When you print Renewal Notices separately from billing, you must perform an ad hoc search so that you don't print duplicate notices.

When you print an initial bill, the system looks for records with REMINDER_COUNT = 0 (renewal hasn't been printed). It is possible, however, that a record has a REMINDER_COUNT = 0 and you may not want to print the Renewal Notice, as in the following examples:

- You generate a billing run by selecting the Rebill option on the Set up general options window. In this case the REMINDER_COUNT is reset to zero.
- You manually print an individual Renewal Notice by clicking Create Invoice from the Billing tab. In this case, REMINDER_COUNT never increments.

1. From Billing, select Process billing to display the Process billing window.

   Note: Do not select either option in the Billing Options area.

2. Click New.
3. Select a billing cycle from Select a Cycle to Process.
4. (optional) Override the Run Date.
5. Select Initial Bill under Printing Options.
6. Select Ad Hoc Search under Additional Options.
7. Click Run. The Select Search Instructions window opens.
8. Click New to display the Search Instructions window.
9. Enter a Search Name.
10. Enter the new search instructions.

    Note: Press Ctrl + Z to expand the Comparison Value field.
11. Click Save on the Search Instructions window.
12. Click OK on the Select Search Instructions window.

    Note: If you print Renewal Notices to the screen prior to sending them to the printer, they may not be aligned exactly as they appear on the screen. To achieve the correct formatting, always print reports directly to the printer rather than from the screen.

Customizing the Renewal Notice Formats

A variety of standard renewal notice options are available. Although the presentation of most billing-related data is predetermined, many aspects can be customized.

For many of the available formats, the enlarged, bold title that appears at the top of the notice is user-defined within the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders). You can also define a limited size (notice-specific) text area.

In addition to the Billing and Reminder Notice title and text options, you can customize other aspects of the renewal notice by entering instructions on the Report Specifications window (select Utilities> Report Specs).

> **Note:** Note: If changes are made on the Report Specifications window, you must make the changes on a cloned copy of the standard report. This step is required to make the changes permanent.

The types of changes that can be made on the Report Specifications window include the following:

- The entry of larger user-defined text areas
- The addition of merge fields from the customer/subscriber-specific data. Up to five merge fields can be included in the overlay text

  Note: There is no provision for merge fields in the Billing and Reminder Notices text.
- The modification or addition of a few available printing options that affect the output
- The modification of top and/or left margins, which may be required to align the printed output with an iMIS-authorized preprinted form.

  Note: Crystal Report parameters should not be deleted from a report as the majority of them are necessary to run the report. The preferred method for building reports is to clone your existing report specifications, which automatically copies the report parameters.

  To generate a custom Renewal Notice

  To enter user-defined overlay text, you may need to customize a renewal format to print merge fields from a customer's demographic data or to modify or add an available printing option. User-defined text that exceeds 255 alphanumeric characters must be specified here.

  Follow these steps to generate a custom Renewal Notice for your organization:

1. Select Utilities > Report Specs.

   The Report Specifications window opens.
2. Select the Dues Renewal Notice to customize.

Note: If you are cloning one of the DUES-Renewal Notices-Std. Form ASI-### reports, you may need to adjust the top and left margins to print the renewal notice correctly on your printer. To change the margins, select Options> Margins.

3. Click Clone.
4. Tab to the Title field and enter a unique name.
5. Click Parameters.

   The Detail Report Parameters window displays the current parameters for the report you cloned.

6. Tab to the Options field and add or remove available options. Available options vary from format to format. The two primary renewal notice options include the following:

- SUPPRESS_ZERO_ITEMS - Suppresses printing line items that have been paid off or that have a zero balance. This option suppresses individual zero balance line items when the grand total of the renewal notice is nonzero.
- PRINT_CHECKBOX - Displays checkboxes on the renewal form stub in which a customer/subscriber can choose items to pay (an optional addition that is not part of the standard option set).

7. Tab to the Parameters field and enter the text to be printed on the renewal notices. To print your organization's name and address, enter the name and address in the Parameters field. The organization name and address will not automatically print as they do on some invoices and bills from other iMIS modules.

   The entered text overlays the standard report elements. Therefore, add hard returns (by pressing Enter) to shift text down the page far enough to avoid the preset report elements on the form.

   In the following example, three additional merge fields [Temp.Item1], [Temp.Item2], and [Temp.Item3] have been included in the overlay text. Use the following instructions to define merge fields.

   Example of parameters changed on customized renewal format

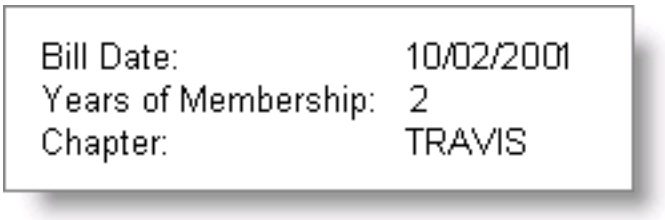
1. Click Options and select Additional Fields to open the Additional Fields window.
2. Enter a formula or field name that corresponds to the merge fields entered in the Parameters field on the Detail Report Parameters window. Tab to each Field Name row and continue entering the data that will be merged with the overlay text entered in the Parameters field. A field can reference data contained in the Name, Name_Fin, Subscriptions.BILL_DATE, or any user-defined table. You can enter up to five additional fields in the notice by selecting Options> Additional Fields. Field names must be entered in the Filename.FIELDNAME format. For example, Name.INFORMAL brings in the informal nickname from the Name file.

   Note: The formula or field name entered in the first row must correspond to the [Temp.Item1] overlay text entered in the Parameters field on the Detail Report Parameters window.

   Note: All calculations must be prefixed with @# where # represents the number of the field (1-5). Field names do not need to be prefixed.

   Note: If you enter an SQL calculation for a field, you might be prompted: Invalid Omnis calculation: proceed anyhow? Click Yes and ignore the warning.
3. Click OK to close the Additional Fields window.
4. Click Save to close the Detail Report Parameters window.
5. Click Save to close the Report Specifications window.
6. Select the cloned report title from the Forms drop-down menu on the appropriate billing cycle.
7. Test the renewal notice.

Example of text entry area expanded. This formula calculates the years of membership.



A portion of the text entered in the Parameters area with merge data from the resulting renewal notice.

To add user-defined text to the Dues Renewal Notice

The Dues Renewal Notice is a standard laser printer renewal notice format that prints the line items in the upper right corner and at the bottom in the remittance stub area. The middle of the renewal format is reserved for user-defined text.

1. Select Utilities > Reports Specs to display the Report Specifications window.
2. Clone the format.
3. Click Parameters.

   The Detail Report Parameters window opens. User-defined text can be entered in the Parameters field.

   Note: The title, Renewal Notice, cannot be changed. Billing and reminder notices text, entered in the Set up billing cycles window, is ignored with this renewal notice format.

Note: The standard options set in the Options field of the Detail Report Parameters window includes SUPPRESS_ZERO_ITEMS, but PRINT_CHECKBOX is an optional setting that is not included in the standard options set.

To add user-defined text to the Dues Renewal Notice - List Bill

The Dues Renewal Notice - List Bill is a plain-paper laser printer format designed for printing list bills in which the line items for multiple individuals or branches are all listed and totaled on one continuous bill to the BT_ID (bill to ID) or main company. This format may be used when individual or branch billing is billed to the parent company or for agency subscription billings.

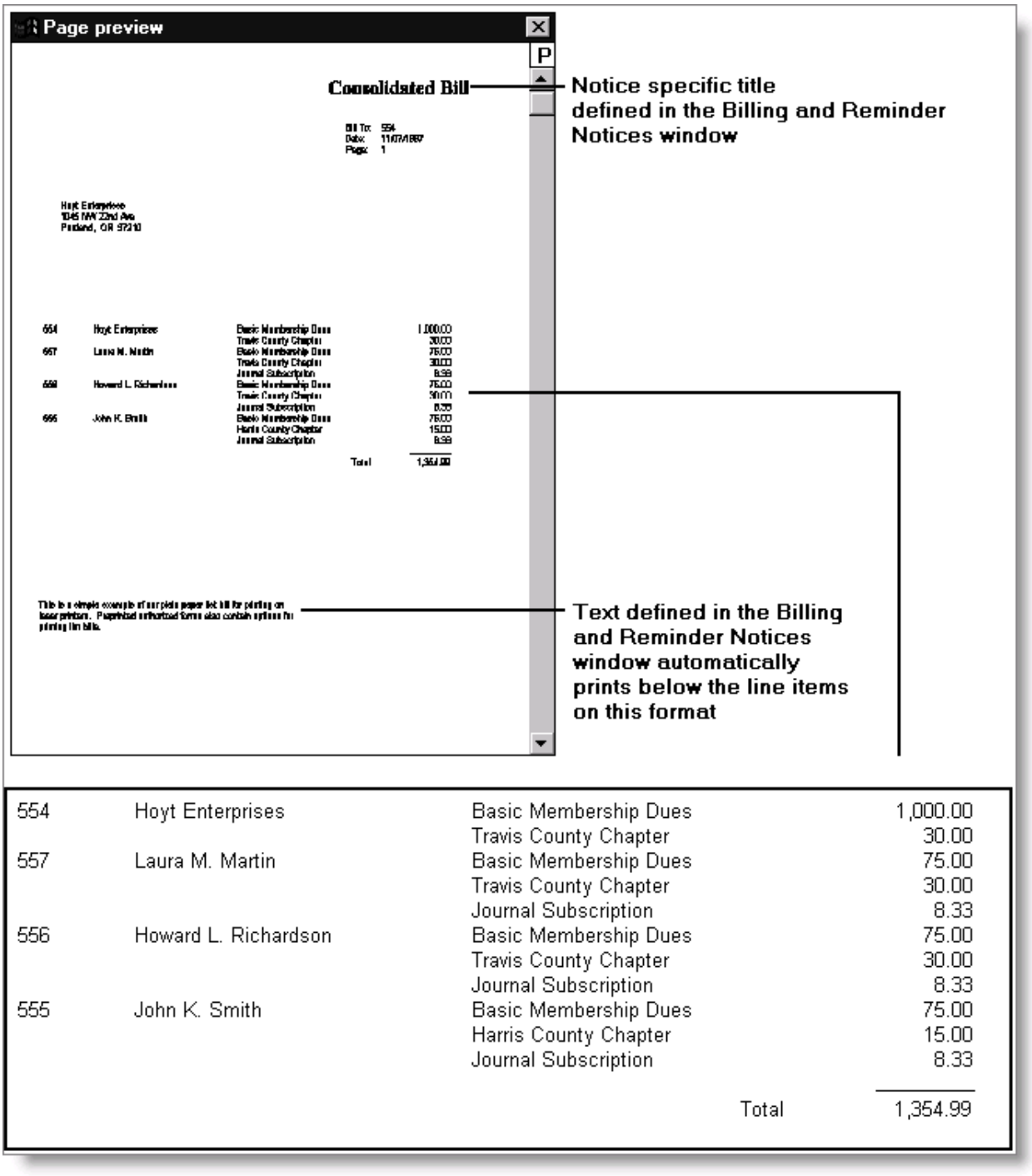
1. Select Utilities > Reports Specs to display the Report Specifications window.
2. Clone the format.
3. Click Parameters.

   The Detail Report Parameters window opens so that user-defined text can be entered in the Parameters field.

   Billing and reminder notices text is formatted to print immediately below the last line item printed. The bolded title prints in the upper right corner.

   The following illustration shows a simple list bill example where the billing line items for the main company, as well as for the individual customers who work for that company, appear on a single combined bill addressed to the company. In a combination bill like this, the line items that belong directly to the billed company will sort to the top of the list, as shown in the example.

   Note: Note: The standard options set in the Options field of the Detail Report Parameters window are SUPPRESS_ZERO_ITEMS and SUPPRESS_CHECKBOX.

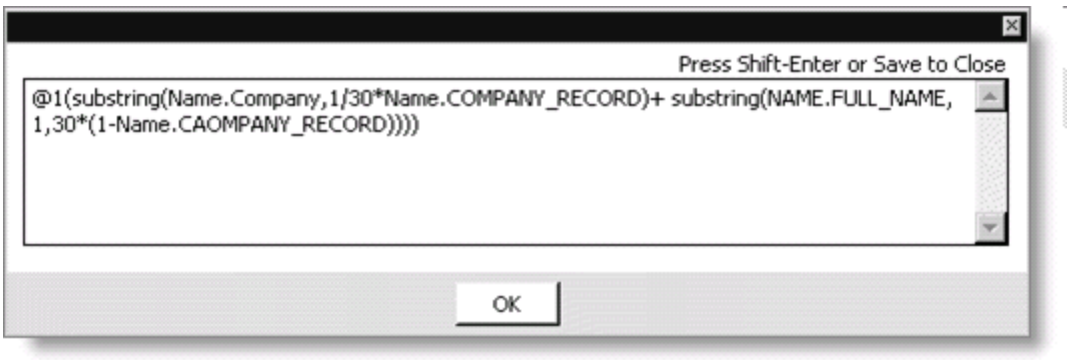


Expanded view of customers and products billed with a Dues Renewal Notice List Bill

The first Additional Fields area, which can be modified, controls the printing of the individual or branch name. The default is set to print the full name for an individual or the company name for a branch.

> **Note:** Note: You can access the Additional Fields window by selecting Utilities> Reports Specs, cloning the format, clicking Parameters, and selecting Additional Fields from the Options drop-down menu.

This default formula is designed to print the company name if the customer or subscriber is a company. If the customer is an individual, the individual's full name prints.



Expanded view of the additional fields area

The following is an example of how to modify the above formula to add the city next to the customer's name.

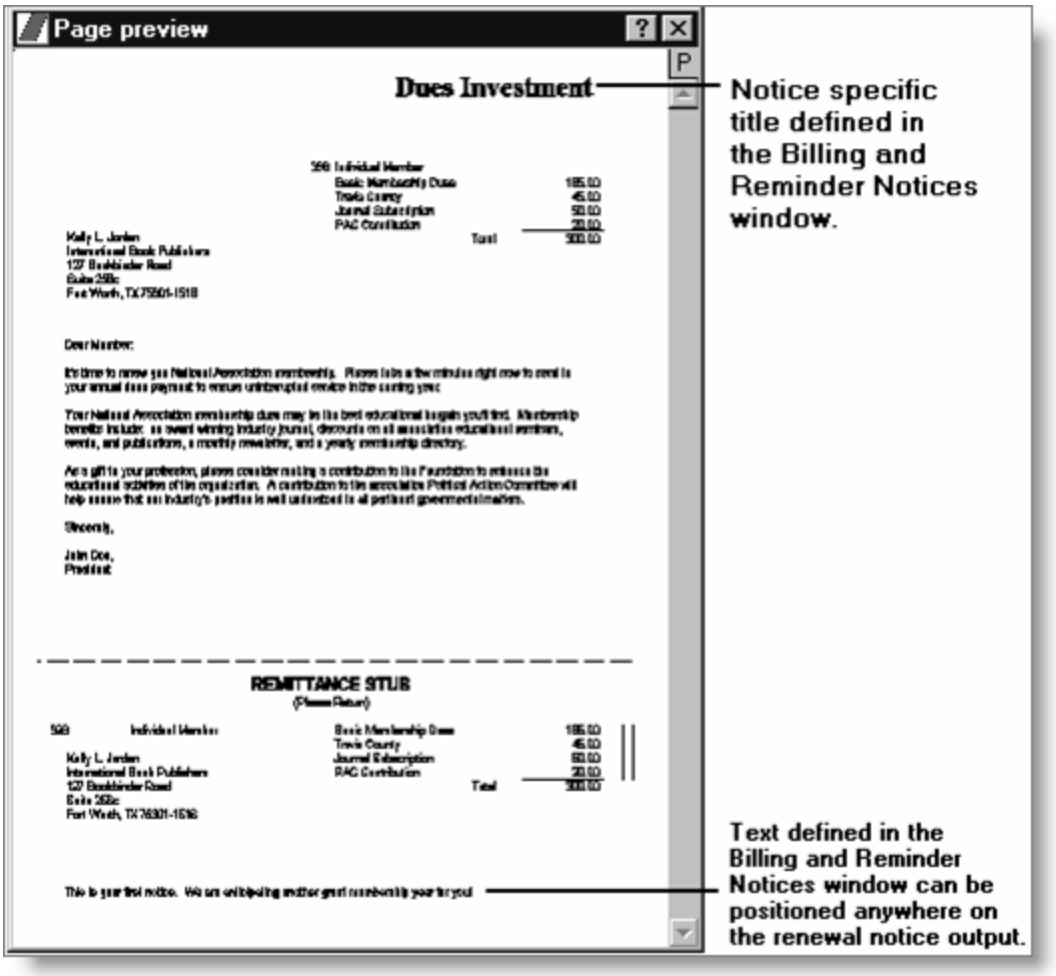
Example of the Dues Renewal Notice with Reminder Text

This format is identical to the Dues Renewal Notice format, except that it uses the Title and Text entered on the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders). You can define

the bold title and reminder text by selecting Utilities> Report Specs, and clicking Parameters.

Fundraising items are flagged (**) and the report includes a note that specifies how much of dues subscriptions are donation, and how much is taxable or receiptable. The report also includes Total FR Donations.

> **Note:** Note: The standard options set in the Options field of the Detail Report Parameters window are SUPPRESS_ZERO_ITEMS and PRINT_CHECKBOX.

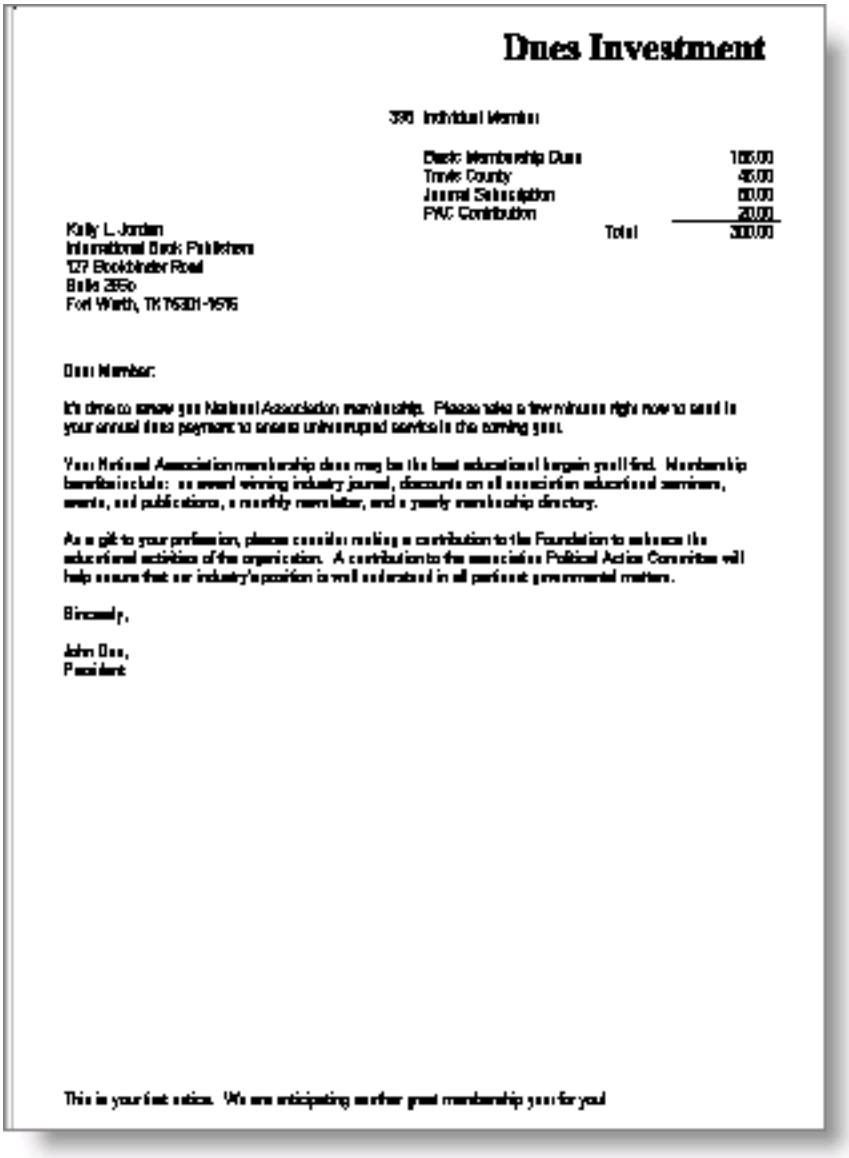


Dues Renewal Notice with reminder text

Example of the Dues Renewal Notice - No Remittance Stub

The printing and customizing options in this example are identical to the Dues Renewal Notice with Reminder Text, but a remittance stub area is not printed.

> **Note:** Note: The standard option set in the Options field of the Detail Report Parameters window is SUPPRESS_ZERO_ITEMS.



Dues Renewal Notice - no remittance stub

iMIS-authorized Renewal Notice formats

The iMIS-authorized Dues Renewal Notice form allows you to generate renewal notices on either dot matrix (continuous) or laser printers. Several of the Standard Renewal Notice formats are designed to print on forms provided in the Authorized Forms Catalog included with iMIS. The Authorized Forms Catalog is a joint effort by ASI and Versient.

In the iMIS Authorized Forms Catalog, there are six preprinted forms (four laser and two continuous) available for printing Billing renewal notices.

> **Note:** Note: For forms that include the credit card payment box (ASI-016, ASI-018, ASI-020-C), you must enter your list of available credit card choices in the Credit Card Types field on the AR/Cash Set up module window.

On certain preprinted forms, there may be optional choices for the iMIS report output (for example, the placement of the line items may be different, or one form could be used for a standard renewal notice or a list bill). The variations of all possible forms and iMIS output choices are represented in the following list of iMIS standard reports:

Std. Form	A laser-printer format that includes a bottom stub for payment and a credit card payment box. Line items are printed in the upper, right corner of the form.
ASI-016 - Line Items at Top	Clone the report specification entry to enter user text. Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Overlay text prints in the middle shaded area of the form. Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD
Std. Form ASI-016 - Line	A laser-printer format that includes a bottom stub for payment and a credit card payment box. Line items are printed in the middle shaded area of the form. Clone the report specification entry to enter user text. Enter overlay text in the

Items in Middle	Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Overlay text prints on the left half of the middle shaded area of the form (for example, to the left of the line items). Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD
Std. Form ASI-017 - Line Items at Top	Identical in form and output to Std. Form ASI-016 except line items are printed at the top of the form and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS
Std. Form ASI-017 - Line Items in Middle	Identical in form and output to Std. Form ASI-016 except line items are printed in the middle of the form and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS
Std. Form ASI-018 - Dbl Column List Bill	A laser-printer list-bill format designed to print a consolidated list of line items for multiple individuals and/or branches whose line items are to be billed to a single parent company or other Bill_To_ID. This particular format is designed with a tear-off stub along the right side of the form, which also contains a credit card payment box. Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Text entered in the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders) is formatted to print immediately below the last line item printed, to the left of the tear-off stub. The first Additional Fields area, which can be modified, controls the printing of

	the individual or branch name. The default is set to print the full name for an individual or the company name for a branch. Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD Optional add on: PRINT_CHECKBOX
Std. Form ASI-019 - Dbl Column List Bill	Identical in form and output to Std. Form ASI-018 except it includes a double-column list bill and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS Optional add on: PRINT_CHECKBOX
Std. Form ASI-020-C - Full Page List Bill	A continuous-format (dot-matrix) form designed for printing list bills in which the line items for multiple individuals/branches are all listed and totaled on one continuous bill to the Bill_To_ID or main company. This list bill, with no stub on the right, provides full-page width to list the individual/branch names and line items. This form also contains a credit card payment box. Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Text entered in the Billing and Reminder Notices window (from Billing, select Set up module> Billing cycles, select a Cycle Name, and click Bills/Reminders) is formatted to print immediately below the line items and totals. The first Additional Fields area, which can be modified, controls the printing of the individual or branch name. The default is set to print the full name for an individual or the company name for a branch. Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD
Std. Form ASI-020-	A continuous-format (dot matrix) form with line items listed in the body of the form (traditional invoice format).

C - Full Page Standard	Enter overlay text in the Parameters field of the Detail Report Parameters window (select Utilities> Report Specs, and click Parameters). Standard Options: SUPPRESS_ZERO_ITEMS, PRINT_CARD Optional add on: DUESDAT appends the printing of the renewal period onto the end of the line item description for any billing type product lines. (For example, FOR 01/01/1999 THRU 12/31/1999.)
Std. Form ASI-021-C - Full Page List Bill	Identical in form and output to Std. Form ASI-020-C. Includes a full-page list bill. The credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS
Std. Form ASI-021-C - Full Page Standard	Identical in form and output to Std. Form ASI-020-C except it includes a full-page standard billing and the credit card payment box and string are omitted. Standard Options: SUPPRESS_ZERO_ITEMS

Sample Billing Reports

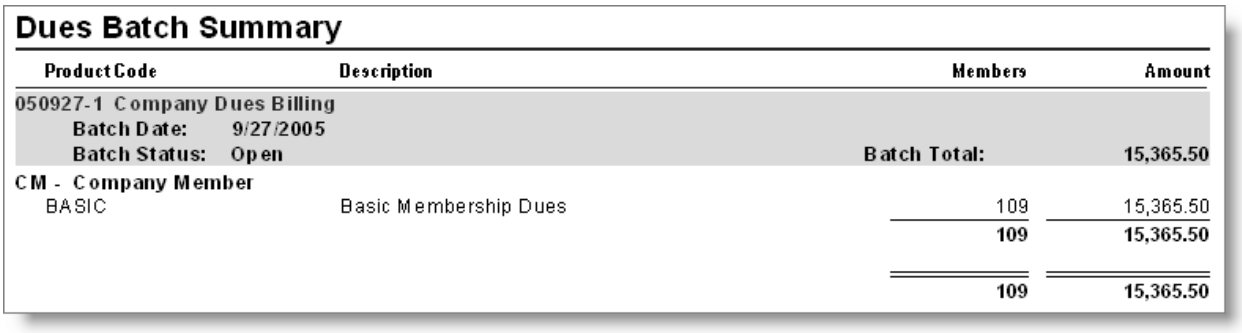
Dues Batch Summary report (Crystal)

The Dues Batch Summary report lists batches that contain Accrual Dues product transactions. The report is grouped by Batch Number, Member Type, and Product Code. Run this report from:

Run this report from: Billing > Process Accrual Dues > Post Batches > click Print Summary

Note: Note: This report includes the following Product Types: DUES, CHAPT, SEC, SUB, VOL, MISC.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Dues Batch Summary

Product Code	Description	Members	Amount
050927-1 Company Dues Billing			
Batch Date: 9/27/2005			
Batch Status: Open		Batch Total:	15,365.50
CM - Company Member			
BASIC	Basic Membership Dues	109	15,365.50
		109	15,365.50
		109	15,365.50

Dues Batch Summary

Dues Product Table Listing report (Crystal)

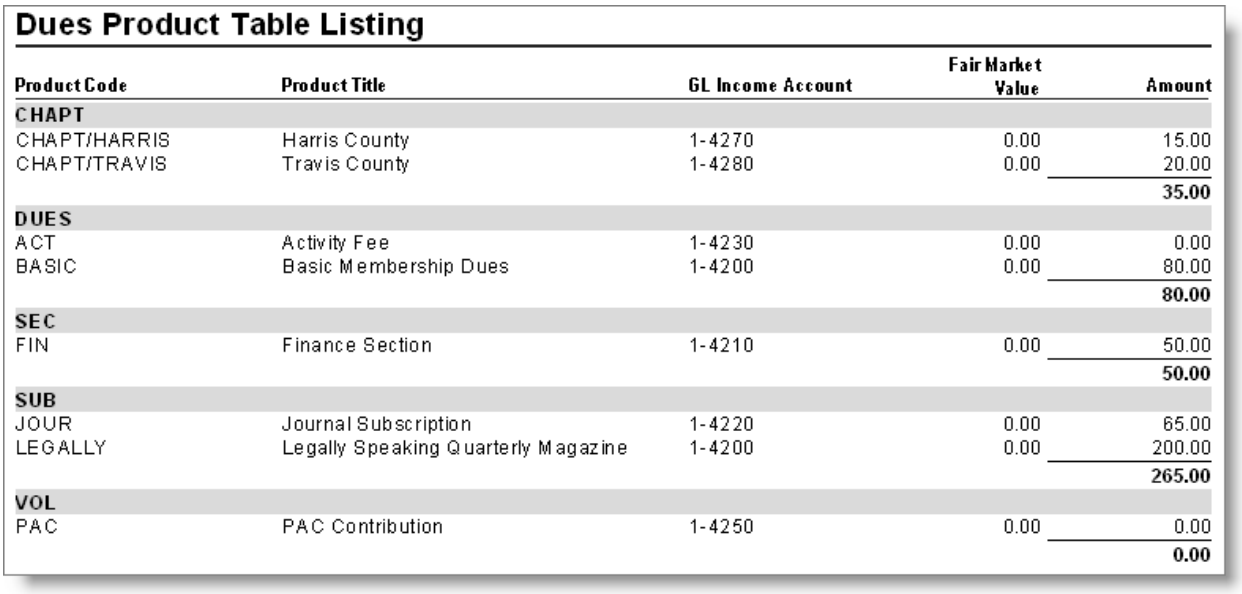
The Dues Product Table Listing lists all of the records in the Product table whose Product Types are used for dues billing. Run this report from:

Admin Console: Continuum > Membership Reports > Contact reports > Tables

Desktop: Billing > Generate Reports > Tables

Note: Note: This report includes the following Product Types: DUES, CHAPT, SEC, SUB, VOL, MISC.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Dues Product Table Listing

Product Code	Product Title	GL Income Account	Fair Market Value	Amount
CHAPT				
CHAPT/HARRIS	Harris County	1-4270	0.00	15.00
CHAPT/TRAVIS	Travis County	1-4280	0.00	20.00
				35.00
DUES				
ACT	Activity Fee	1-4230	0.00	0.00
BASIC	Basic Membership Dues	1-4200	0.00	80.00
				80.00
SEC				
FIN	Finance Section	1-4210	0.00	50.00
				50.00
SUB				
JOUR	Journal Subscription	1-4220	0.00	65.00
LEGALLY	Legally Speaking Quarterly Magazine	1-4200	0.00	200.00
				265.00
VOL				
PAC	PAC Contribution	1-4250	0.00	0.00
				0.00

Dues Product Table Listing

Dues Batch Report (Combined) report

The Dues Batch Report (Combined) is a combination of the Dues Batch Summary and the Dues Batch Detail reports.

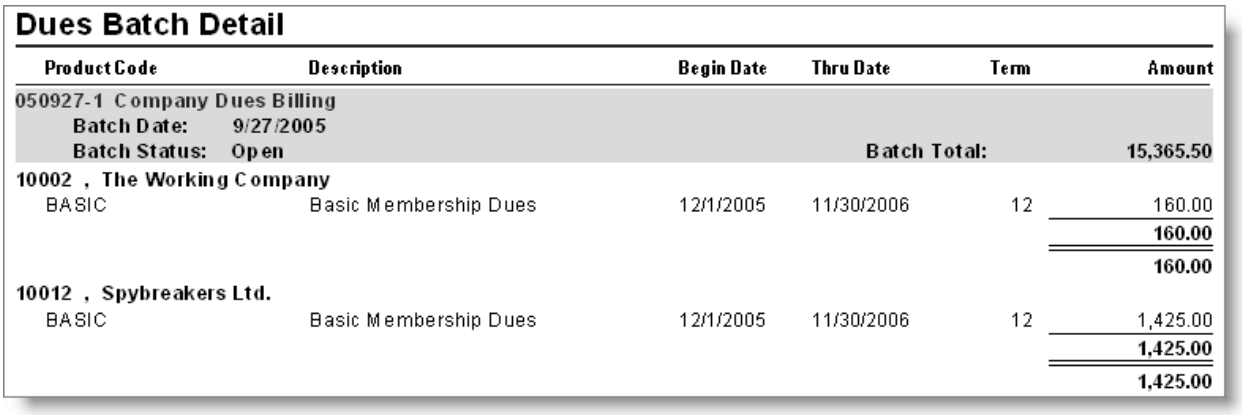
Dues Batch Detail report (Crystal)

The Dues Batch Detail report lists batches that contain Dues product transactions. The report is grouped by Batch_Num and by Bill To ID.

Run this report from: Billing > Process Accrual Dues > Post Batches > Print Detail

> **Note:** Note: This report includes the following Product Types: DUES, CHAPT, SEC, SUB, VOL, MISC.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Dues Batch Detail

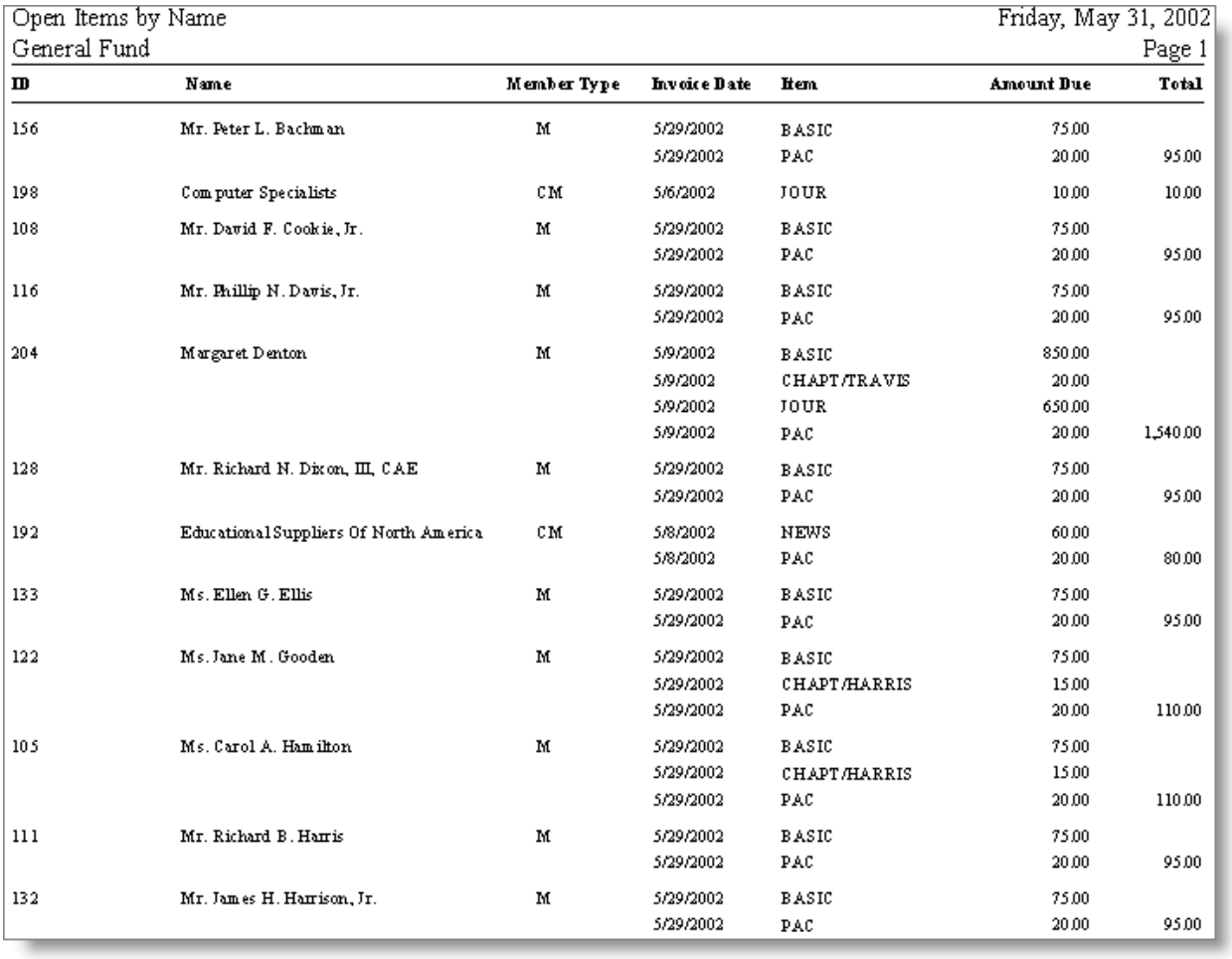
Product Code	Description	Begin Date	Thru Date	Term	Amount
050927-1 Company Dues Billing					
Batch Date: 9/27/2005					
Batch Status: Open			Batch Total:		15,365.50
10002 , The Working Company					
BASIC	Basic Membership Dues	12/1/2005	11/30/2006	12	160.00
					160.00
					160.00
10012 , Spybreakers Ltd.					
BASIC	Basic Membership Dues	12/1/2005	11/30/2006	12	1,425.00
					1,425.00
					1,425.00

Dues Batch Detail

Open Invoices by Name report

The Open Items by Name report lists open line-item amounts (by customer or subscriber) that have been billed through the system and have not been paid.

Fundraising Dues items are flagged (**) and the report includes the footer "** = Voluntary Donation".



Open Items by Name — Friday, May 31, 2002
General Fund — Page 1

ID	Name	Member Type	Invoice Date	Item	Amount Due	Total
156	Mr. Peter L. Backman	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
198	Computer Specialists	CM	5/6/2002	JOUR	10.00	10.00
108	Mr. David F. Cookie, Jr.	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
116	Mr. Phillip N. Davis, Jr.	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
204	Margaret Denton	M	5/9/2002	BASIC	850.00	
			5/9/2002	CHAPT/TRAVIS	20.00	
			5/9/2002	JOUR	650.00	
			5/9/2002	PAC	20.00	1,540.00
128	Mr. Richard N. Dixon, III, CAE	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
192	Educational Suppliers Of North America	CM	5/8/2002	NEWS	60.00	
			5/8/2002	PAC	20.00	80.00
133	Ms. Ellen G. Ellis	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
122	Ms. Jane M. Gooden	M	5/29/2002	BASIC	75.00	
			5/29/2002	CHAPT/HARRIS	15.00	
			5/29/2002	PAC	20.00	110.00
105	Ms. Carol A. Hamilton	M	5/29/2002	BASIC	75.00	
			5/29/2002	CHAPT/HARRIS	15.00	
			5/29/2002	PAC	20.00	110.00
111	Mr. Richard B. Harris	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00
132	Mr. James H. Harrison, Jr.	M	5/29/2002	BASIC	75.00	
			5/29/2002	PAC	20.00	95.00

Admin Console: Continuum > Membership Reports > Billing reports > Open Invoices > Open Invoices by Name

Desktop: Billing > Generate reports > Open Invoices > Open Items by Name

Open Items by Product report

The Open Items by Product report lists open billing amounts (sorted by product) that have been billed through the system and have not been paid. By default, the report lists all items that are open when the report is run. You can use ad hoc selection criteria to reduce the number of items selected. (Click Options and select Search Format before clicking Run.)

Fundraising Dues items are flagged (**) and the report includes the footer "** = Voluntary Donation".

Open Items by Product — Friday, May 31, 2002
General Fund — Page 1

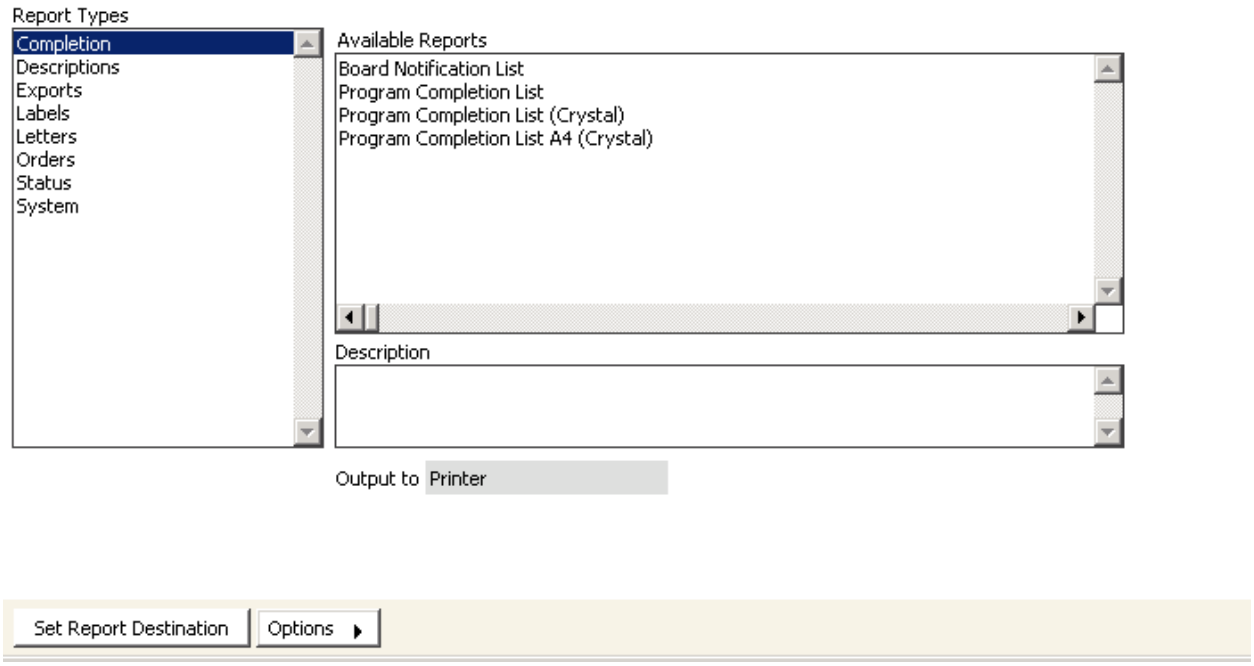
Item/Description	Name	Member Type	Invoice Date	Amount Due
BASIC	Basic Membership Dues			
137	Academy of Child Professors	CM	11/23/1999	100.00
156	Mr. Peter L. Bachman	M	5/29/2002	75.00
180	Brown & Brown	CM	11/23/1999	750.00
107	Ms. Paula D. Caller, CPA	CPA	11/23/1999	100.00
189	Cardio Systems	CM	11/23/1999	1,100.00
183	Computer Specialists	CM	11/23/1999	850.00
185	Cook Graphics	CM	11/23/1999	900.00
108	Mr. David F. Cookie, Jr.	M	5/29/2002	75.00
168	Critical Care Systems	CM	11/23/1999	300.00
116	Mr. Phillip N. Davis, Jr.	M	5/29/2002	75.00
204	Margaret Denton	M	5/9/2002	850.00
128	Mr. Richard N. Dixon, III, CAE	M	5/29/2002	75.00
133	Ms. Ellen G. Ellis	M	5/29/2002	75.00
104	Foundation Support Systems	CM	11/23/1999	400.00
122	Ms. Jane M. Gooden	M	5/29/2002	75.00
105	Ms. Carol A. Hamilton	M	5/29/2002	75.00
111	Mr. Richard B. Harris	M	5/29/2002	75.00
132	Mr. James H. Harrison, Jr.	M	5/29/2002	75.00
166	International Medico	CM	5/8/2002	100.00
129	Mr. Murray K. Jackson	M	5/29/2002	75.00
179	Lambs Industries	CM	11/23/1999	700.00
154	Mr. James W. Main, Jr., CPA	M	5/29/2002	75.00
207	Mary Matthews	M	5/29/2002	75.00
131	Mr. Larry L. Miller	M	5/29/2002	75.00
140	Ms. Louree U. Miller	M	5/29/2002	75.00
188	Morris Health	CM	11/23/1999	1,000.00
136	Ms. Margaret K. Nelson	M	5/29/2002	75.00
167	Omaha Medical Supplies	CM	11/23/1999	200.00
194	Christopher Panella	M	4/26/2002	75.00
114	Pecan Street, Inc.	CM	11/23/1999	450.00
199	Janet Prosser	M	5/7/2002	75.00
127	Publications Etc.	CM	11/23/1999	600.00
170	Quality Products	CM	11/23/1999	500.00

Admin Console: Continuum > Membership Reports > Billing reports > Open Invoices > Open invoices by Product

Desktop: Billing > Generate reports > Open Invoices > Open Items by Product (Crystal)

Reports for Certification

Certification reports window



Admin Console: Continuum > Membership Reports > Certification reports
Desktop: Certification > Generate reports

There are several Certification reports. Some are necessary for updating student records, such as the Board Notification List report or the Program Completion List report (which also tests for program completion).

You will run all certification reports from the Certification reports window.

Generating Completion Reports

Completion reports update program information for students who have completed a certification program. For example, when you run the Board Notification List report, which contains a list of students who have completed the requirements for the selected program, student records are updated as well as fields on the Register a student by program window.

To generate a completion report

1. From Certification, select Generate reports to open the Generate reports window.

2. From Report Types, select Completion.
3. From Available Reports, select a report.
4. Click Set Report Destination and select an output option.
5. Click Run.

   The Certification Selections window opens.
6. Select a search option:

- Single Program - Enter a program code, or click the lookup icon to select a program. Processes a report for the single program.
- All Active Programs - Processes a report for all active programs
- Adhoc Search - Create the search criteria to use to process the report.

7. Click OK to run the report.

   To view program status after the completion report is run

1. From Certification, select Register a student > By program to open the Register a student by program window.
2. Click Open.
3. Enter an ID in the Registrant field.
4. Press Tab.

   The student's record is displayed. The Board Notified? field is checked and the When? field contains today's date.

Generating Export Reports

You can run special export reports for generating form letters in your word processing software, for example, a letter from the executive director or president to students when they earn their certification. The Certification module exports files to both Microsoft Word and WordPerfect.

To generate an export file

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Exports.
3. From Available Reports, select Export Name and Address to Microsoft Word.
4. Click Run to open the Certification Selections window.
5. Enable the appropriate Certification Items option.
6. Select the appropriate Print Options.
7. Enable the appropriate Address option.
8. Click OK to open the Set print file name window.
9. Enter a file name and click Save.
10. Open a blank document in Microsoft Word.
11. Select Tools > Mail Merge.

    The Mail Merge Helper window opens.
12. Click Create > Form Letters under the Main document area.

    A message asks you to choose either Active Window or New Main Document.
13. Click Active Window.
14. Click Get Data > Open Data Source under the Data source section, and browse to the file you saved.

    A message alerts you that Word found no merge fields in your main document and displays an Edit Main Document button.
15. Click Edit Main Document and enter the appropriate merge fields in the document.
16. Click OK to save the document.
17. Merge the information and print the form letter.

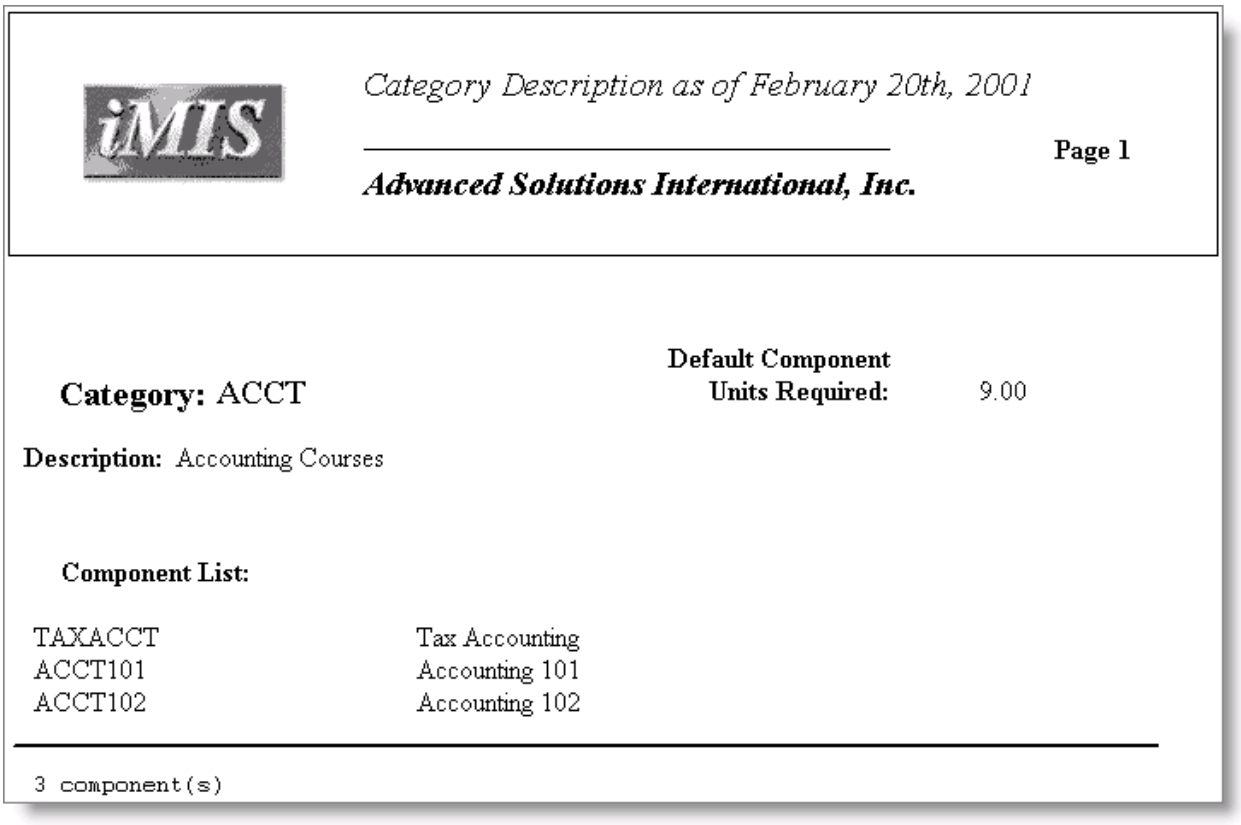
Generating Description Reports

Description reports allow you to view the details of a specific category or component, as well as lists of categories or components. For example, the Category Description report displays all the components that make up the category and the number of units required to complete the category. In addition, you can generate reports listing all available certification categories, components, and programs.

To generate a description detail report

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Descriptions.
3. From Available Reports, select the Category Description report .
4. Click Run.

   The Certification Selections window opens.
5. Enable the appropriate Certification Items options.
6. Click OK to generate the Category Description report.



Category Description as of February 20th, 2001

Page 1

Advanced Solutions International, Inc.

Default Component
Units Required: 9.00

Category: ACCT

Description: Accounting Courses

Component List:

TAXACCT	Tax Accounting
ACCT101	Accounting 101
ACCT102	Accounting 102

3 component(s)

Sample Description Detail report

Generating Certification Letter Reports

With the Certification module, you can generate letters to specific students.

To generate letter reports

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Letters.
3. From Available Reports, select Student Notification Letters.
4. Click Run to open the Certification Selections window.
5. Enable the appropriate Certification Items options.
6. Enter an ID in the Student ID field.

7. Enable the Notify Student option.
8. Click OK to generate the Student Notification Letter report.

Generating Status Reports

With the Certification module, you can generate several reports that allow you to view the status of program components, as well as the status of students enrolled in either one or multiple programs.

To run the Component Registration List report

With the Certification module, you can see how many people are registered for any component and generate a list of their names.

1. From Certification, select Generate reports to open the Generate reports window.
2. From Report Types, select Status.
3. From Available Reports, select a report.
4. Click Run.

   The Certification Selections window displays.
5. Enable the appropriate Single Component and enter the component code in the data entry field.
6. Click OK.

`

Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Registration List

Component Registration List As Of: February 20th, 2001

ACCT101 - Accounting 101

The University Of Texas
1991 Red River
Austin, TX 78701
U.S.

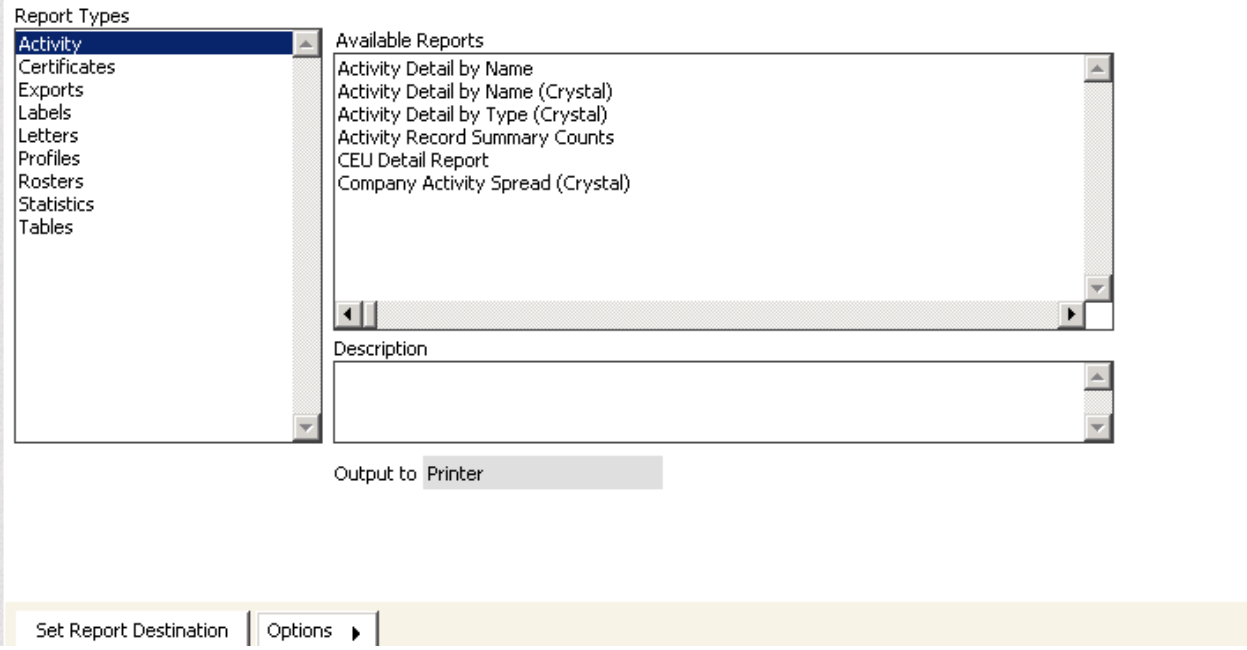
Student		Enrolled Date
107	Ms. Paula D. Caller, CPA, Acme, Inc., Newark, NJ	01/24/00
152	Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International, Newark, NJ	01/24/00
152	Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International, Newark, NJ	01/24/00
107	Ms. Paula D. Caller, CPA, Acme, Inc., Newark, NJ	01/24/00

Total Number of Registrants For: ACCT101 4

Sample Component Registration List report

Reports for Contacts

Contact reports window



Admin Console: Continuum > Membership Reports > Contact reports

Desktop: Customers > Generate reports

Running Committee Reports

There are three Committee Management subsystem report types:

- Committee
- Proposed
- Applicant

The print dialog box lets you customize your reports by selecting various committees, positions, and terms in the search.

To print committee reports

1. From Customers, select Manage committees to open the Manage committees window.
2. From Committees, select the committee code.
3. Click Print to open the Committee Reports window.
4. From Report Types, select a report type.
5. From Available Reports, select a report format.
6. Click Run to open the Committee Selection window.
7. Select the committee options that you want your report to contain.

   Note: The options available vary depending on the type of report selected.
8. Click OK.

Running Chapter Reports

When you click the Print button on the Manage chapter rosters window, the Chapter Reports window opens. From this window, you can access five Chapter Management subsystem report types:

- Exports
- Labels
- Month End

- Rosters
- Statistics

To run a chapter report

Before running a standard report, check your printer destination.

1. From Customers, select Manage chapter rosters to open the Manage chapter rosters window.
2. Click Print.
3. From Report Types, select a report type.
4. From Available Reports, select a report.

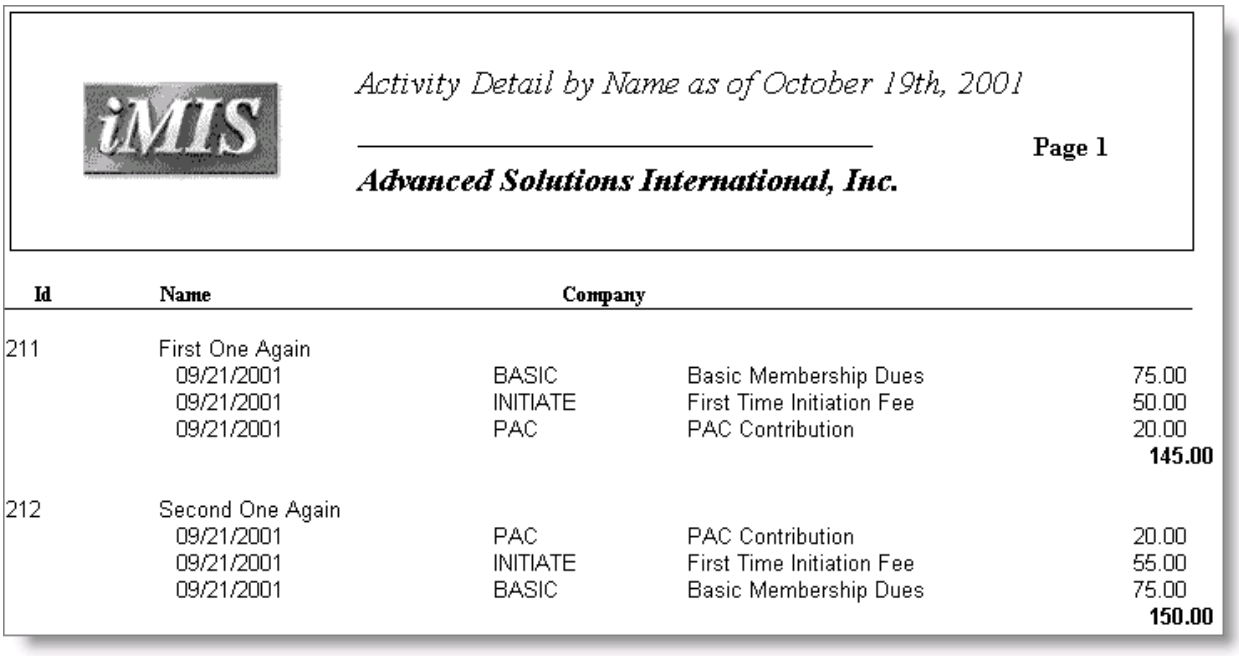
   Note:Check the description of the report in the Description field at the bottom of the window.
5. Click Run.

   The Chapter Selection window opens.
6. (optional) Select your print options.
7. Click OK.

Sample Customer Reports

Activity Detail report

The Activity Detail reports can provide information by name or by type. The Activity Detail by Name report lists activities by individual with dates and totals. The Activity Detail by Type report lists activities by type and product with totals.



Activity Detail by Name as of October 19th, 2001

Page 1

Advanced Solutions International, Inc.

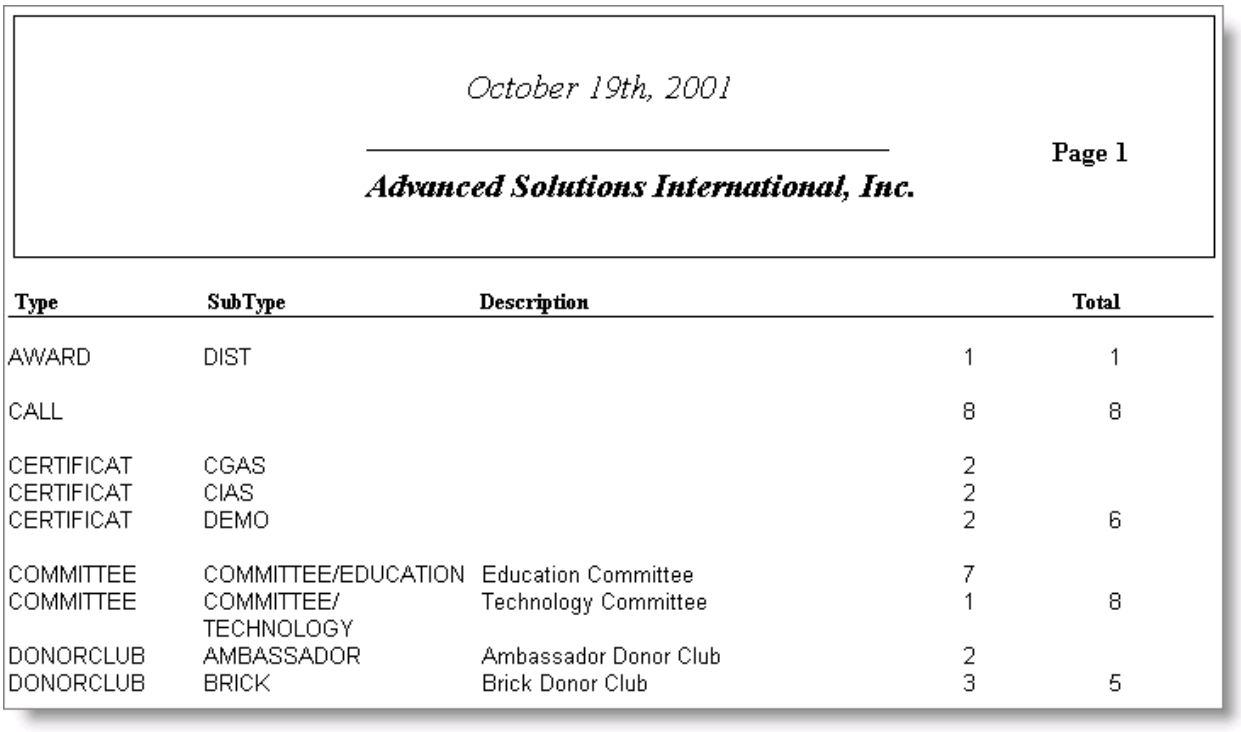
Id	Name	Company		
211	First One Again			
	09/21/2001	BASIC	Basic Membership Dues	75.00
	09/21/2001	INITIATE	First Time Initiation Fee	50.00
	09/21/2001	PAC	PAC Contribution	20.00
				145.00
212	Second One Again			
	09/21/2001	PAC	PAC Contribution	20.00
	09/21/2001	INITIATE	First Time Initiation Fee	55.00
	09/21/2001	BASIC	Basic Membership Dues	75.00
				150.00

Admin Console: Continuum > Membership Reports > Contact reports > Activity

Desktop: Customers > Generate reports > Activity > Activity Detail by Name

Activity Record Summary Counts report

The Activity Record Summary Counts report lists the total number of activity records by activity type and subtype (product).



October 19th, 2001

Page 1

Advanced Solutions International, Inc.

Type	SubType	Description		Total
AWARD	DIST		1	1
CALL			8	8
CERTIFICAT	CGAS		2	
CERTIFICAT	CIAS		2	
CERTIFICAT	DEMO		2	6
COMMITTEE	COMMITTEE/EDUCATION	Education Committee	7	
COMMITTEE	COMMITTEE/ TECHNOLOGY	Technology Committee	1	8
DONORCLUB	AMBASSADOR	Ambassador Donor Club	2	
DONORCLUB	BRICK	Brick Donor Club	3	5

Admin Console: Continuum > Membership Reports > Contact reports > Active Record Summary Counts

Desktop: Customers > Generate reports > Activity > Activity Record Summary Counts

Certificate of Appreciation report

The Certificate of Appreciation report provides a formatted certificate of appreciation for a member or donor.

Admin Console: Continuum > Membership Reports > Certification reports

Desktop: Customers > Generate reports > Certificates > Certificate of Appreciation

Certificate of Membership report

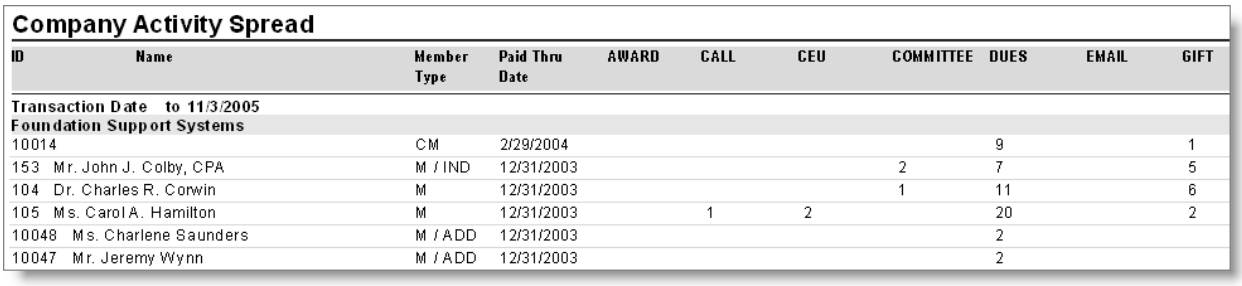
The Certificate of Membership report prints a formatted membership certificate which includes the presentation date and member since information for a member.

Admin Console: Continuum > Membership Reports > Contact reports > Certificates > Certificate of Membership

Desktop: Customers, select Generate reports > Certificates > Certificate of Membership

Company Activity Spread report

The Company Activity Spread report provides a summary of up to seven selected activities for a company and its associated contacts, along with the member type and paid thru date of the associated contacts/members/customers.



Company Activity Spread

ID	Name	Member Type	Paid Thru Date	AWARD	CALL	CEU	COMMITTEE	DUES	EMAIL	GIFT
Transaction Date to 11/3/2005										
Foundation Support Systems										
10014		CM	2/29/2004					9		1
153	Mr. John J. Colby, CPA	M / IND	12/31/2003				2	7		5
104	Dr. Charles R. Corwin	M	12/31/2003				1	11		6
105	Ms. Carol A. Hamilton	M	12/31/2003		1	2		20		2
10048	Ms. Charlene Saunders	M / ADD	12/31/2003					2		
10047	Mr. Jeremy Wynn	M / ADD	12/31/2003					2		

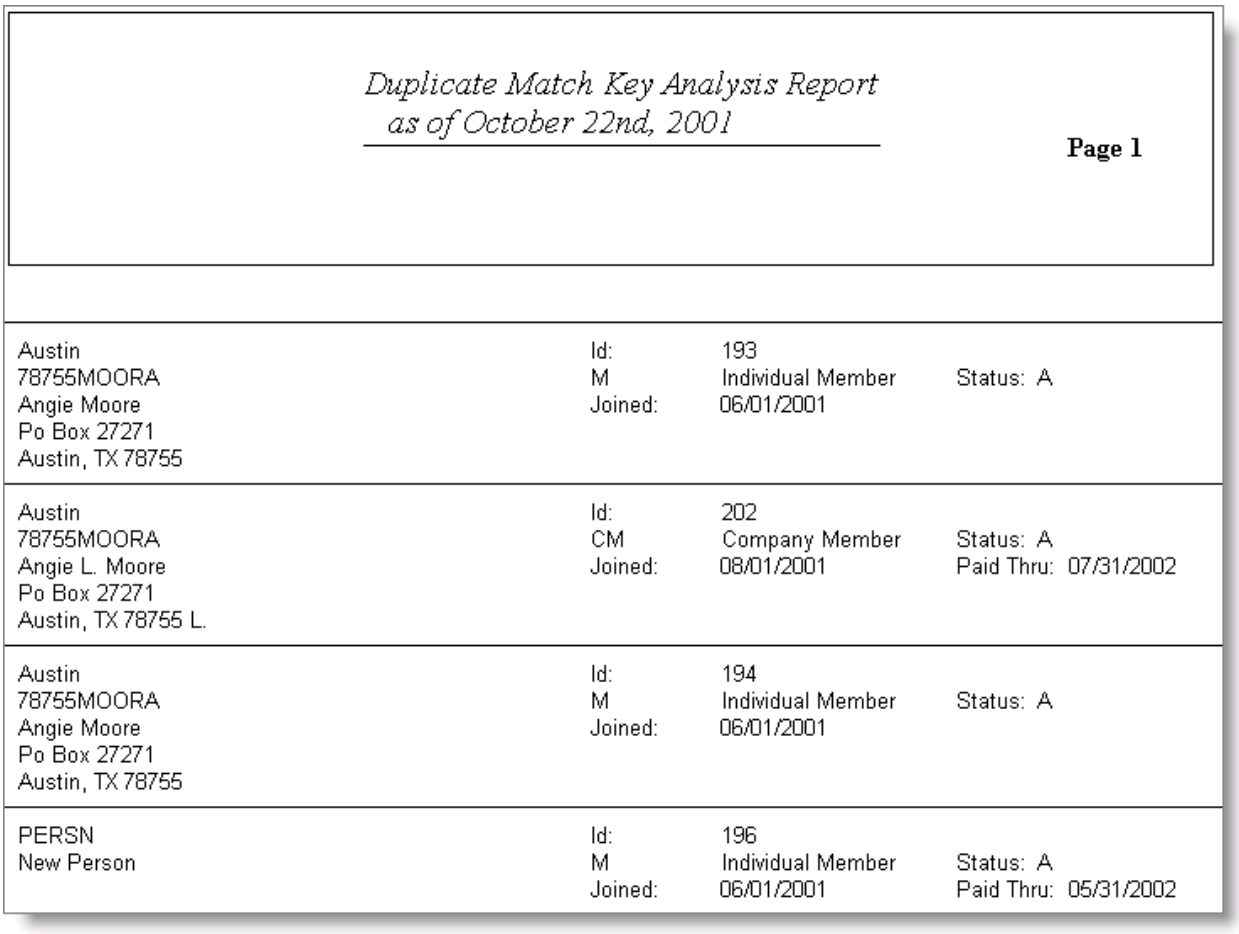
Run this report from:

Admin Console: Continuum > Membership Reports > Contact reports > Activity

Desktop: Customers > Generate Reports > Activity

Duplicate Match Key Analysis report

This statistical report prints a listing of records with the same duplicate match key.



Duplicate Match Key Analysis Report
as of October 22nd, 2001

Page 1

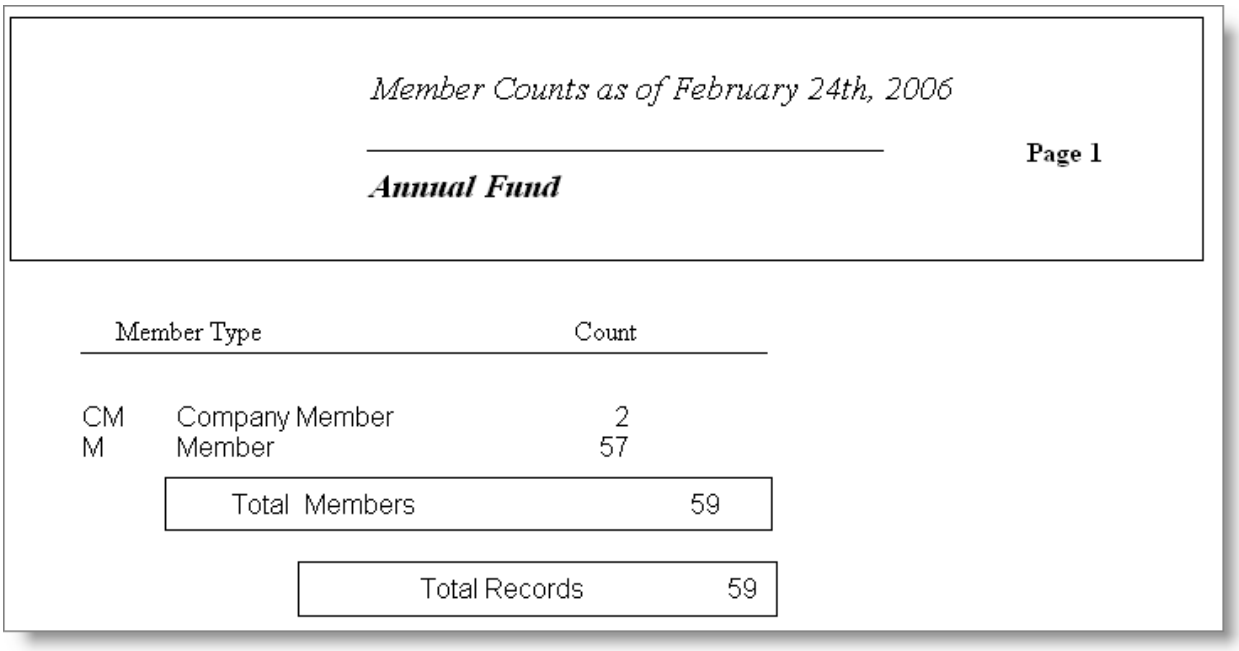
Austin 78755MOORA Angie Moore Po Box 27271 Austin, TX 78755	Id: M Joined:	193 Individual Member 06/01/2001	Status: A
Austin 78755MOORA Angie L. Moore Po Box 27271 Austin, TX 78755 L.	Id: CM Joined:	202 Company Member 08/01/2001	Status: A Paid Thru: 07/31/2002
Austin 78755MOORA Angie Moore Po Box 27271 Austin, TX 78755	Id: M Joined:	194 Individual Member 06/01/2001	Status: A
PERSN New Person	Id: M Joined:	196 Individual Member 06/01/2001	Status: A Paid Thru: 05/31/2002

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Duplicate Match Key Analysis Report

Desktop: Customers > Generate reports > Statistics > Duplicate Match Key Analysis Report

Member/Contact Counts report

The Member Counts reports lists customer counts by Join Year or by Customer type. The report can be filtered by member/contact type, and by member status.



Member Counts as of February 24th, 2006

Page 1

Annual Fund

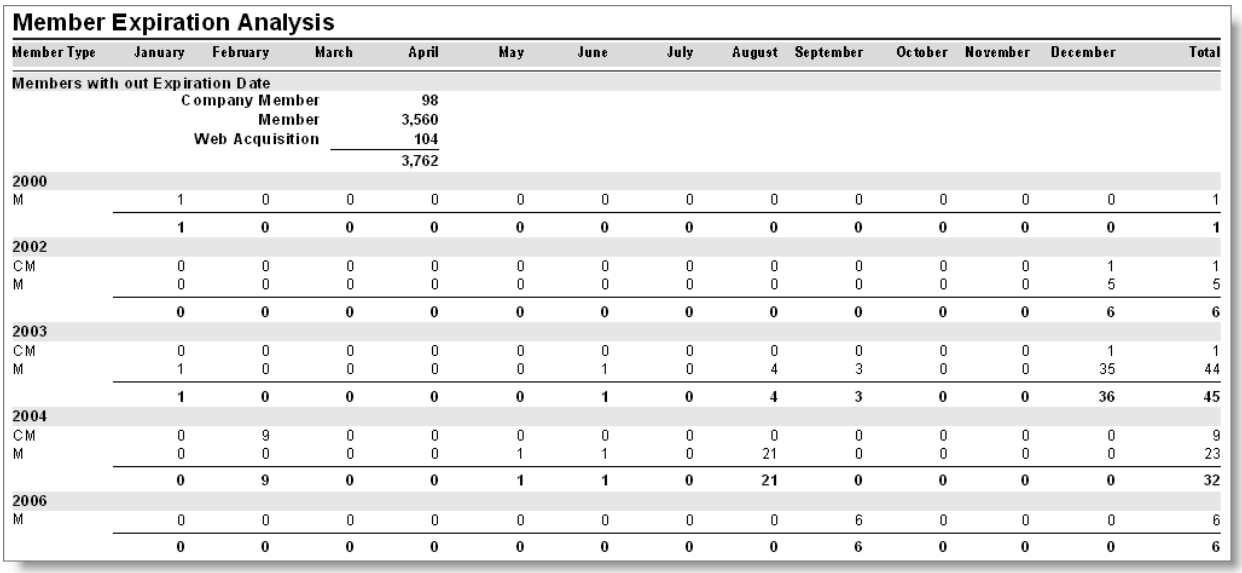
Member Type		Count
CM	Company Member	2
M	Member	57
	Total Members	59
	Total Records	59

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Member/Contact Counts

Desktop: Customers > Generate reports > Statistics > a Member/Contact Counts report

Member Expiration Analysis report

The Member Expiration Analysis report shows the number of expirations by year, by membership type, and by month.



Member Expiration Analysis

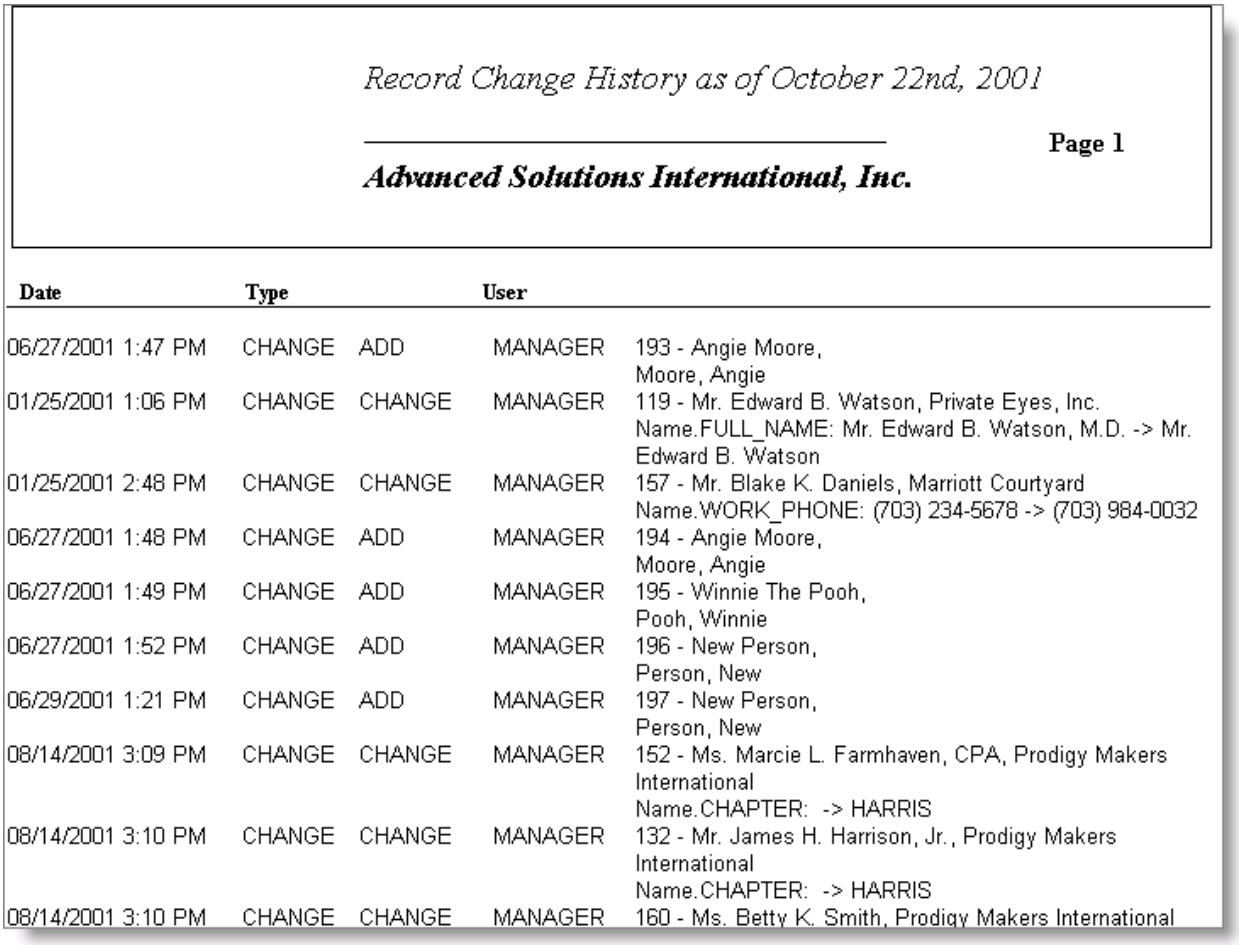
Member Type	January	February	March	April	May	June	July	August	September	October	November	December	Total
Members with out Expiration Date													
Company Member				98									
Member				3,560									
Web Acquisition				104									
				3,762									
2000													
M	1	0	0	0	0	0	0	0	0	0	0	0	1
	1	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**1**
2002													
CM	0	0	0	0	0	0	0	0	0	0	0	1	1
M	0	0	0	0	0	0	0	0	0	0	0	5	5
	0	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**6**	**6**
2003													
CM	0	0	0	0	0	0	0	0	0	0	0	1	1
M	1	0	0	0	0	1	0	4	3	0	0	35	44
	1	**0**	**0**	**0**	**0**	**1**	**0**	**4**	**3**	**0**	**0**	**36**	**45**
2004													
CM	0	9	0	0	0	0	0	0	0	0	0	0	9
M	0	0	0	0	1	1	0	21	0	0	0	0	23
	0	**9**	**0**	**0**	**1**	**1**	**0**	**21**	**0**	**0**	**0**	**0**	**32**
2006													
M	0	0	0	0	0	0	0	0	6	0	0	0	6
	0	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**6**	**0**	**0**	**0**	**6**

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Member Expiration Analysis (Crystal)

Desktop: Customers > Generate reports > Statistics > Member Expiration Analysis (Crystal)

Record Change History report

This report prints the field change history for a given range of dates.



Record Change History as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Date	Type		User	
06/27/2001 1:47 PM	CHANGE	ADD	MANAGER	193 - Angie Moore, Moore, Angie
01/25/2001 1:06 PM	CHANGE	CHANGE	MANAGER	119 - Mr. Edward B. Watson, Private Eyes, Inc. Name.FULL_NAME: Mr. Edward B. Watson, M.D. -> Mr. Edward B. Watson
01/25/2001 2:48 PM	CHANGE	CHANGE	MANAGER	157 - Mr. Blake K. Daniels, Marriott Courtyard Name.WORK_PHONE: (703) 234-5678 -> (703) 984-0032
06/27/2001 1:48 PM	CHANGE	ADD	MANAGER	194 - Angie Moore, Moore, Angie
06/27/2001 1:49 PM	CHANGE	ADD	MANAGER	195 - Winnie The Pooh, Pooh, Winnie
06/27/2001 1:52 PM	CHANGE	ADD	MANAGER	196 - New Person, Person, New
06/29/2001 1:21 PM	CHANGE	ADD	MANAGER	197 - New Person, Person, New
08/14/2001 3:09 PM	CHANGE	CHANGE	MANAGER	152 - Ms. Marcie L. Farmhaven, CPA, Prodigy Makers International Name.CHAPTER: -> HARRIS
08/14/2001 3:10 PM	CHANGE	CHANGE	MANAGER	132 - Mr. James H. Harrison, Jr., Prodigy Makers International Name.CHAPTER: -> HARRIS
08/14/2001 3:10 PM	CHANGE	CHANGE	MANAGER	160 - Ms. Betty K. Smith, Prodigy Makers International

Admin Console: Continuum > Membership Reports > Contact reports > Statistics > Record/Change History

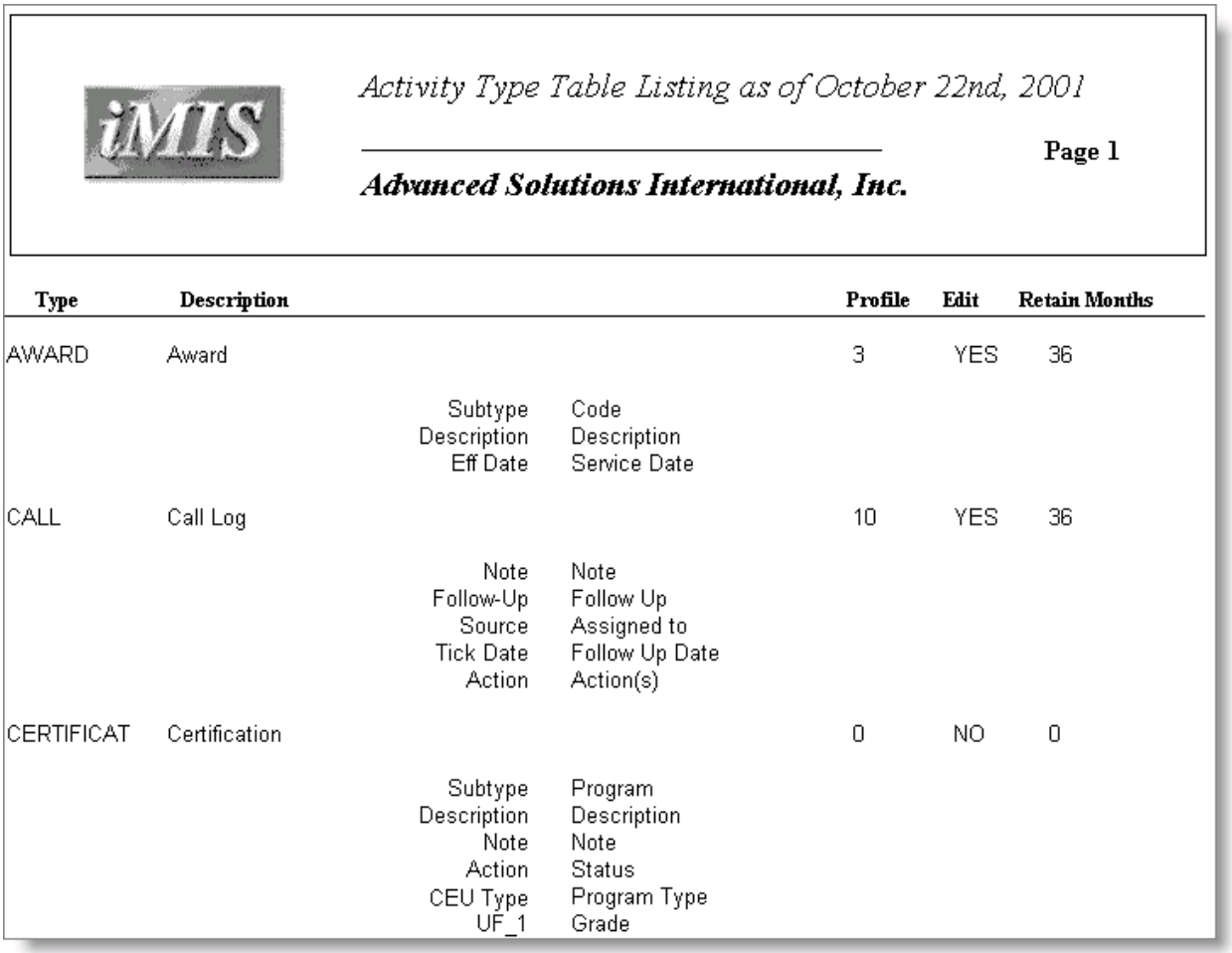
Desktop: Customers > Generate reports > Statistics > Record Change History

Count by Member Type spreadsheet report

	A	B	C
1	Code	Member Type	Total
2	M	Individual Member	38
3	CM	Company Member	29
4	NMC	Non Member Company	15
5	A	Associate Member	6
6	HOTEL	Hotel	2
7	NM	Non Member	1
8	Code	Member Type	Total

Table Listings report

This report includes a listing of Activity Tables by Chapter name, Committee code, Committee position, and the General/Validation/Expansion table.



Activity Type Table Listing as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Type	Description			Profile	Edit	Retain Months
AWARD	Award			3	YES	36
		Subtype	Code			
		Description	Description			
		Eff Date	Service Date			
CALL	Call Log			10	YES	36
		Note	Note			
		Follow-Up	Follow Up			
		Source	Assigned to			
		Tick Date	Follow Up Date			
		Action	Action(s)			
CERTIFICAT	Certification			0	NO	0
		Subtype	Program			
		Description	Description			
		Note	Note			
		Action	Status			
		CEU Type	Program Type			
		UF_1	Grade			

Admin Console: Continuum > Membership Reports > Contact reports > Tables > Activity Type Table Listing

Desktop: Customers > Generate reports > Tables > Table Listing Report

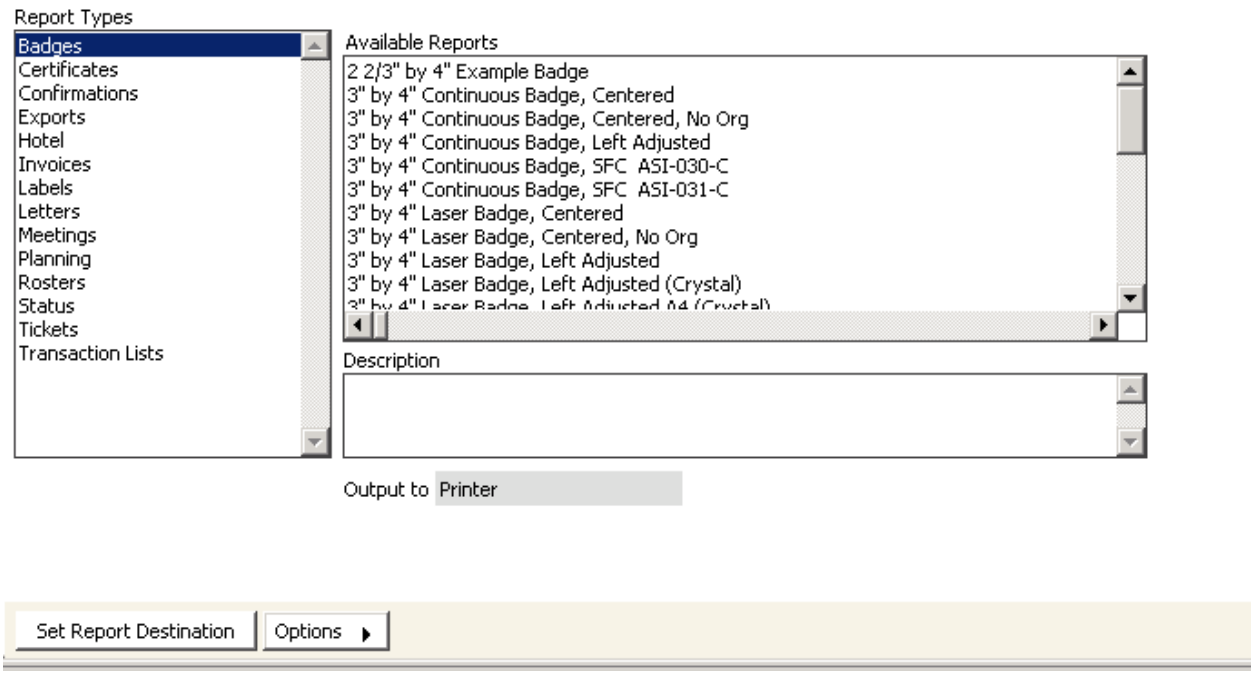
Hands-on exercise: Clone a report

In this exercise, you will create a new report by cloning it from an existing report.

1. Select Utilities > Report Specs to open the Report Specifications window.
2. Select the MEMBERSHIP - Activity - Activity Detail by Name report from the drop-down list.
3. Click Clone.
4. Change the name of the Title to Activity Detail by Name - New.
5. Click Save on the Report Specifications window to display the report you created with the other Standard Reports on the Reports menu.

Event Reports

Event reports window



Admin Console: Continuum > Events and Orders Reports > Event reports
Desktop: Events > Generate reports

Events-Specific Report Options

The report options Print_Guest and Print_Additional_Badges enable you to include Event badge holders other than conference registrants in several Events reports. The check-boxes for these options, Guest and Additional Badges, are included under the Print Options area of the Event Selections window.

> **Note:** Note: Badge holder information is entered on the Event Registration > Badge Information window.

Print_Guest affects Events badge holders whose BADGE_TYPE is GUEST.

> **Note:** Note: The GUEST type must be defined in the BADGE_TYPE General Look-up/Validation table for the report option to work correctly.

Print_Additional_Badges affects Events badge holders whose BADGE_TYPE is any type other than PRIMARY.

The following reports accommodate the use of Print_Guest and Print_Additional_ Badges:

- Formal Meeting Roster, Alpha by Name (Crystal) - the report format groups and sorts by the primary registrant's last name, with associated badge holders, sorted by their last names, directly following the primary registrant.
- Formal Meeting Roster, by Company (Crystal) - the report format groups and sorts primary registrants by their company names, with associated badge holders, sorted by their last names, directly following the primary registrant. Company names are not listed for non-primary badge holders.
- Preregistration List (Crystal) - the report format groups and sorts by Meeting Title, Order Number, Primary Registrant, and associated badge holders.

The following reports offer the Print_Guest and Print_Additional_Badges options but have not been specially formatted to use them:

- Formal Meeting Roster, by Company/Institute (Crystal) - no change to report format
- Preregistration List
- Export Registrants to Microsoft Word
- All Labels by Zip
- All Badges reports except Combination Badge and Ticket reports

> **Note:** Note: Combination Badge and Ticket reports automatically print a badge for the Registrant and a badge for the next badge holder listed in that registrant's Badges tab. This feature cannot be turned off.

Modifying invoice reports for zero balance and payment details

The following reports, when the search condition is modified in the report specification, can print invoices for registrants with a zero balance:

- MeetingInvoicesOE4
- MeetingInvoicesOE4_VAT
- MeetingInvoicesOE1
- MeetingInvoicesOE1_VAT

These changes are intended only for customized and cloned reports. The standard reports will not differ from their previous versions. You can clone any of the above reports or customized versions of these reports and manually modify the relevant report specification to achieve the intended results.

To modify an invoice to print zero-balance invoices

1. Clone the desired Meeting Invoices report.

2. Click Parameters to display the Detail Report Parameters window.
3. In the Search field, remove the Orders.BALANCE <> 0 criteria.
4. Click Save.

You can now run the cloned report.

The Multi Payments option enables you to print payment details for event registrations. The description field for each payment indicates the type of payment (check or credit card name) and the check number or credit card name (the credit card number is masked).

To print payment lines from Events > Generate reports, enable the Multi Payments option. If you want to print payment details on invoices generated from the Register a customer window, you must modify the invoice's report specification.

To modify an invoice to print payment details

1. Clone the desired Meeting Invoices report.
2. Click Parameters to display the Detail Report Parameters window.
3. Click Edit.
4. Change NO_MULTI_PAYMENTS to PRINT_MULTI_PAYMENTS in the Options field.
5. Click Save.

Sample Events Reports

Badges report

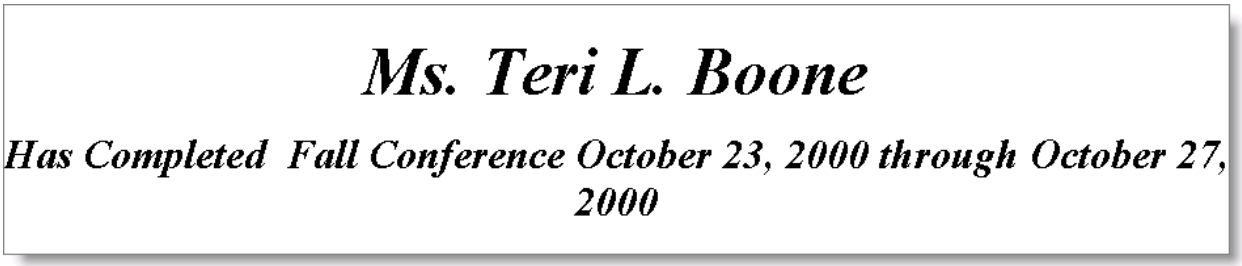
There are several different formats available for printing badges.

Admin Console: Continuum > Events and Orders Reports > Event Reports > Badges

Desktop: Events > Generate reports > Badges

CEU Certificates report

The CEU Certificates report prints a Function/Meeting Certificate (Form ASI-038).

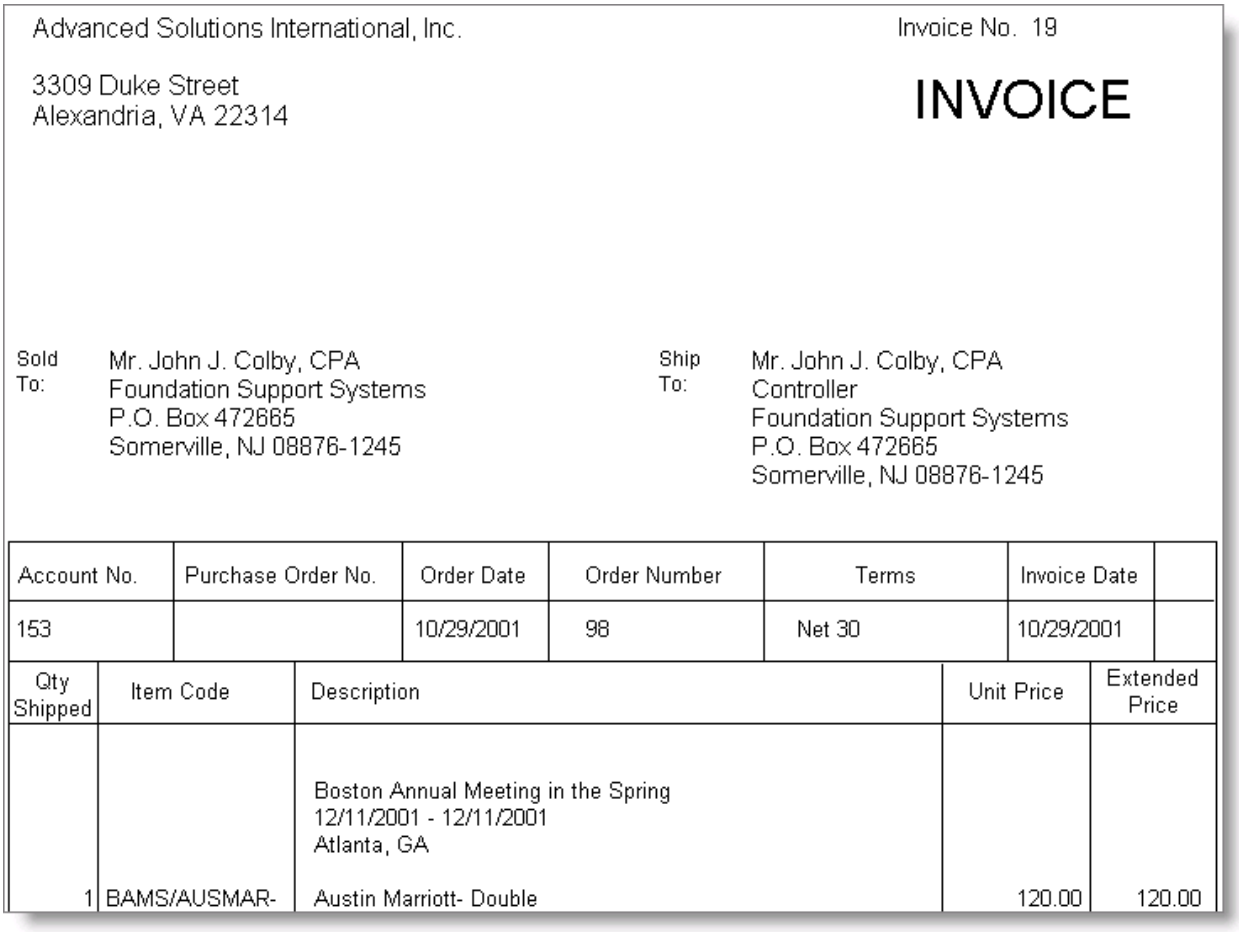


Admin Console: Continuum > Events and Orders Reports > Certificates > Function/Meeting Certificate SFL

Desktop: Events > Generate reports > Certificates > Function/Meeting Certificate SF

Meeting Registration Invoice report

The Print Invoices report (MeetingInvoicesOE1.rpt) and Print New Invoices report (MeetingInvoicesOE4.rpt) allow the printing of the correct entity on the invoices by entering PRINT_MULTI_ENTITY in the Print options field on the Report Parameters window. It also includes a legend for cancelled and wait-listed functions.



Advanced Solutions International, Inc.

3309 Duke Street
Alexandria, VA 22314

Invoice No. 19

INVOICE

Sold To: Mr. John J. Colby, CPA
Foundation Support Systems
P.O. Box 472665
Somerville, NJ 08876-1245

Ship To: Mr. John J. Colby, CPA
Controller
Foundation Support Systems
P.O. Box 472665
Somerville, NJ 08876-1245

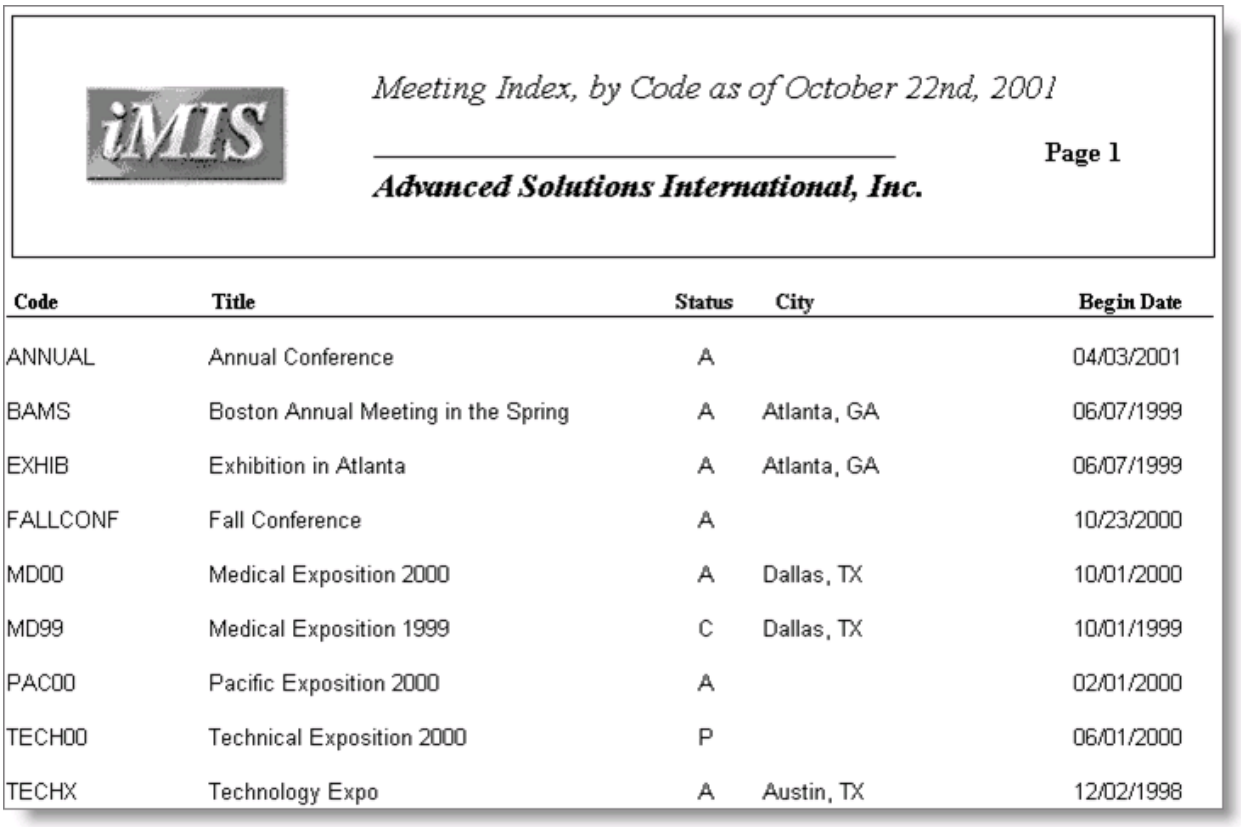
Account No.	Purchase Order No.	Order Date	Order Number	Terms	Invoice Date	
153		10/29/2001	98	Net 30	10/29/2001	

Qty Shipped	Item Code	Description	Unit Price	Extended Price
		Boston Annual Meeting in the Spring 12/11/2001 - 12/11/2001 Atlanta, GA		
1	BAMS/AUSMAR-	Austin Marriott- Double	120.00	120.00

Individual event invoices also can be run from Events Portfolio (from Events, select Register a customer, find an event registration, click Print, select the Invoice report option, and click Print).

Meeting Index report

The Meeting Index report prints a list of all events. This index can be by code, date, status, or title.



Meeting Index, by Code as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Code	Title	Status	City	Begin Date
ANNUAL	Annual Conference	A		04/03/2001
BAMS	Boston Annual Meeting in the Spring	A	Atlanta, GA	06/07/1999
EXHIB	Exhibition in Atlanta	A	Atlanta, GA	06/07/1999
FALLCONF	Fall Conference	A		10/23/2000
MD00	Medical Exposition 2000	A	Dallas, TX	10/01/2000
MD99	Medical Exposition 1999	C	Dallas, TX	10/01/1999
PAC00	Pacific Exposition 2000	A		02/01/2000
TECH00	Technical Exposition 2000	P		06/01/2000
TECHX	Technology Expo	A	Austin, TX	12/02/1998

Admin Console: Continuum > Events and Orders Reports > Event Reports > Meetings > Meeting Index, by Code

Desktop: Events > Generate reports > Meetings > Meeting Index, By Code

Activity Planning report

The Activity Planning report lists total event definition, including event/function names and descriptions.

Boston Annual Meeting in the Spring
Planning Report as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

BAMS Boston Annual Meeting in the Spring 06/07/1999

Description Boston Annual Meeting in the Spring

Address Atlanta Market Center
Exhibition Hall West
240 Peachtree Street, NW
Atlanta, GA 30343

Begins 06/07/1999
Ends 06/11/1999

Cutoff Dates **Early** 05/11/1999 **Regular** 06/03/1999 **Late**

Notes Call the Sheraton at (404) 478-9000 if you have any questions concerning your accomodations!

Function BREAK Chairman's Breakfast
Begins 06/11/1999 7:30 AM
Ends 06/11/1999 9:30 AM

Admin Console: Continuum > Events and Orders Reports >Event Reports > Planning > Planning Report

Desktop: Events > Generate reports > Planning > Planning Report

Registration Class report

The Registration Class report displays a list of the available registration classes.

Registration Classes as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

Code	Description	Long Description
CM	Company Member	
M	Member	
NM	Non-Member	
S	Staff	
V	Volunteer	

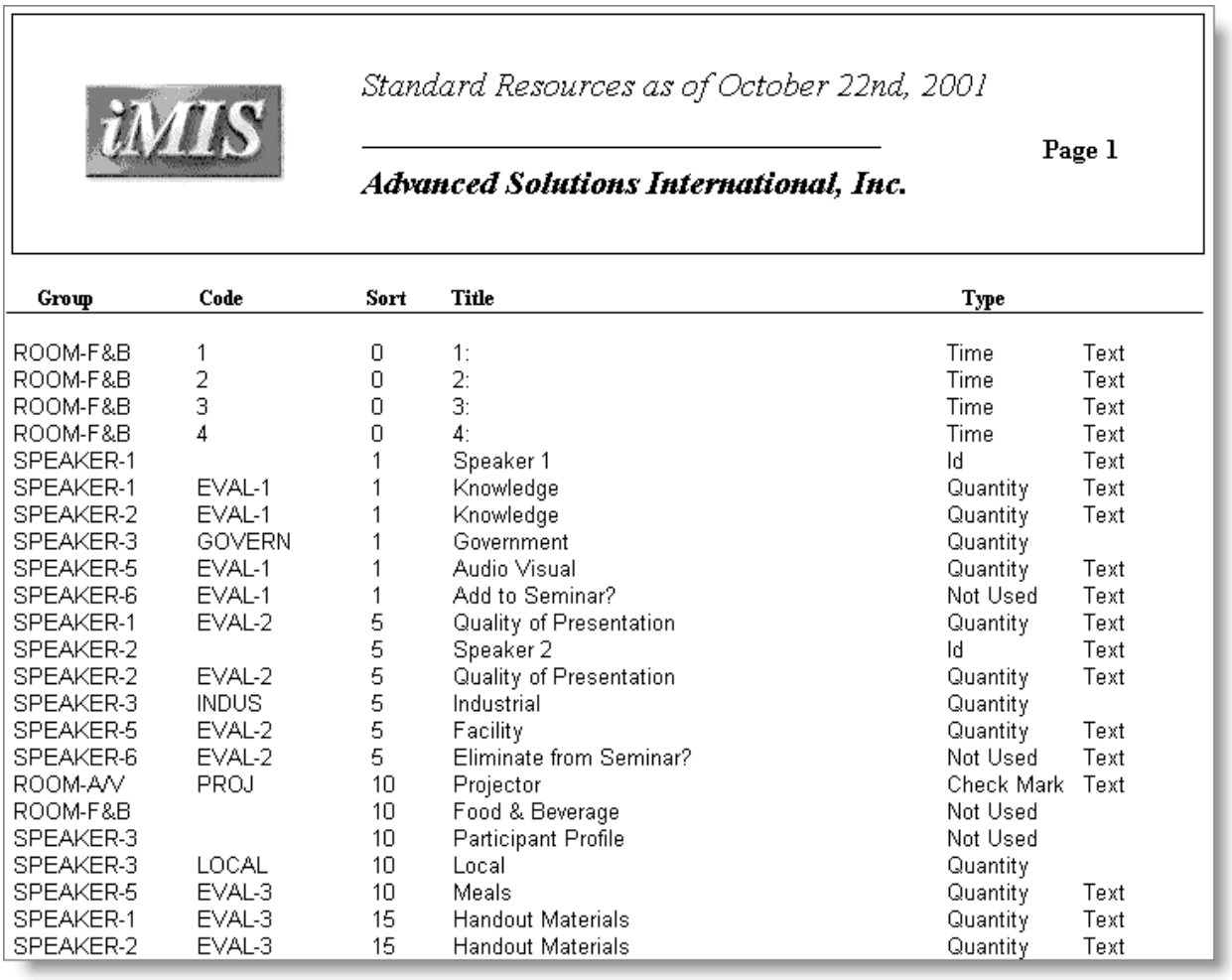
5 Records Listed

Admin Console: Continuum > Events and Orders Reports > Event reports > Planning > Registration Classes

Desktop: Events > Generate reports > Planning > Registration Classes

Standard Resources report

The Standard Resources report provides a description of all the standard resources.



Standard Resources as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

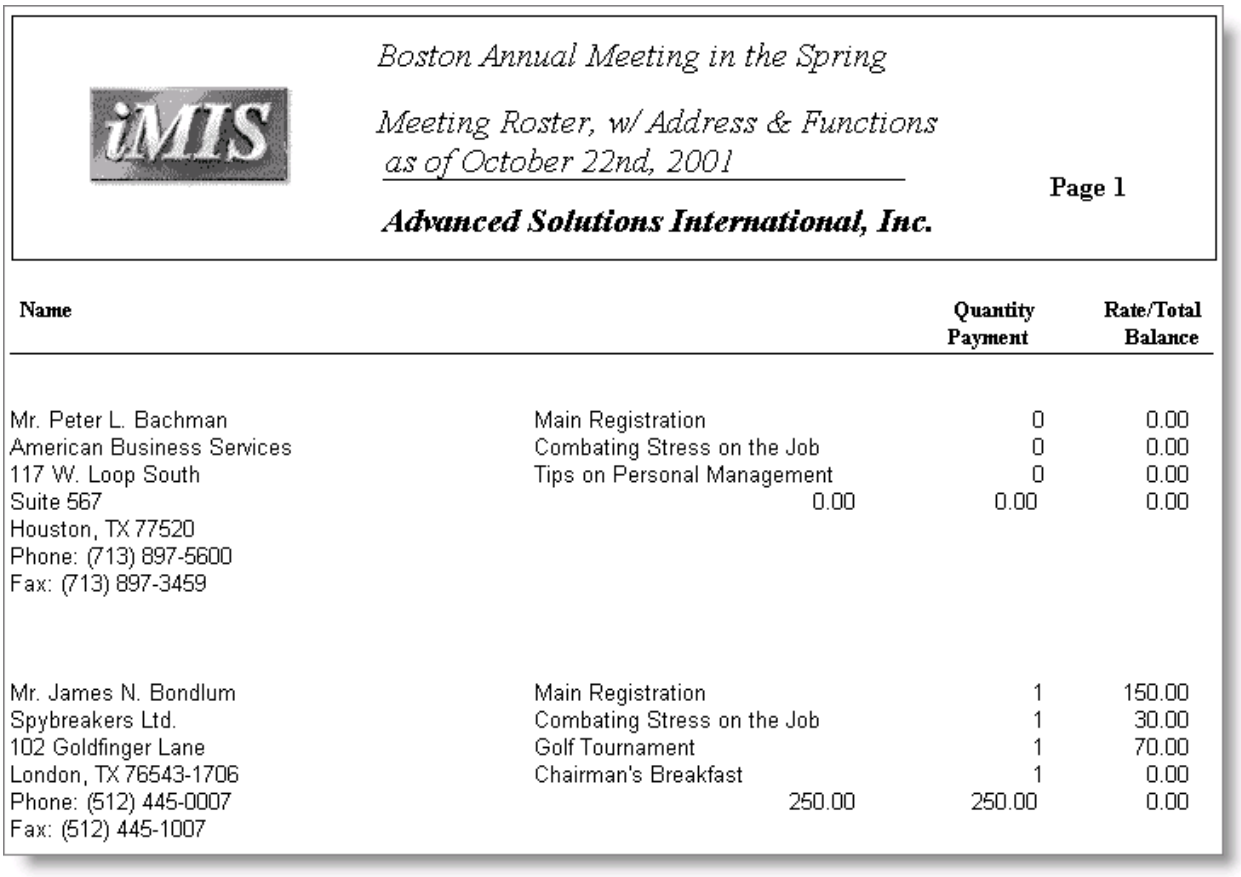
Group	Code	Sort	Title	Type	
ROOM-F&B	1	0	1:	Time	Text
ROOM-F&B	2	0	2:	Time	Text
ROOM-F&B	3	0	3:	Time	Text
ROOM-F&B	4	0	4:	Time	Text
SPEAKER-1		1	Speaker 1	Id	Text
SPEAKER-1	EVAL-1	1	Knowledge	Quantity	Text
SPEAKER-2	EVAL-1	1	Knowledge	Quantity	Text
SPEAKER-3	GOVERN	1	Government	Quantity	
SPEAKER-5	EVAL-1	1	Audio Visual	Quantity	Text
SPEAKER-6	EVAL-1	1	Add to Seminar?	Not Used	Text
SPEAKER-1	EVAL-2	5	Quality of Presentation	Quantity	Text
SPEAKER-2		5	Speaker 2	Id	Text
SPEAKER-2	EVAL-2	5	Quality of Presentation	Quantity	Text
SPEAKER-3	INDUS	5	Industrial	Quantity	
SPEAKER-5	EVAL-2	5	Facility	Quantity	Text
SPEAKER-6	EVAL-2	5	Eliminate from Seminar?	Not Used	Text
ROOM-A/V	PROJ	10	Projector	Check Mark	Text
ROOM-F&B		10	Food & Beverage	Not Used	
SPEAKER-3		10	Participant Profile	Not Used	
SPEAKER-3	LOCAL	10	Local	Quantity	
SPEAKER-5	EVAL-3	10	Meals	Quantity	Text
SPEAKER-1	EVAL-3	15	Handout Materials	Quantity	Text
SPEAKER-2	EVAL-3	15	Handout Materials	Quantity	Text

Admin Console: Continuum > Events and Orders Reports > Event reports > Planning > Standard Resources

Desktop: Events > Generate reports > Planning > Standard Resources

Rosters and Directories report

The available rosters include function rosters, pre-registration lists, membership rosters, and directories.



Boston Annual Meeting in the Spring

Meeting Roster, w/ Address & Functions
as of October 22nd, 2001

Page 1

Advanced Solutions International, Inc.

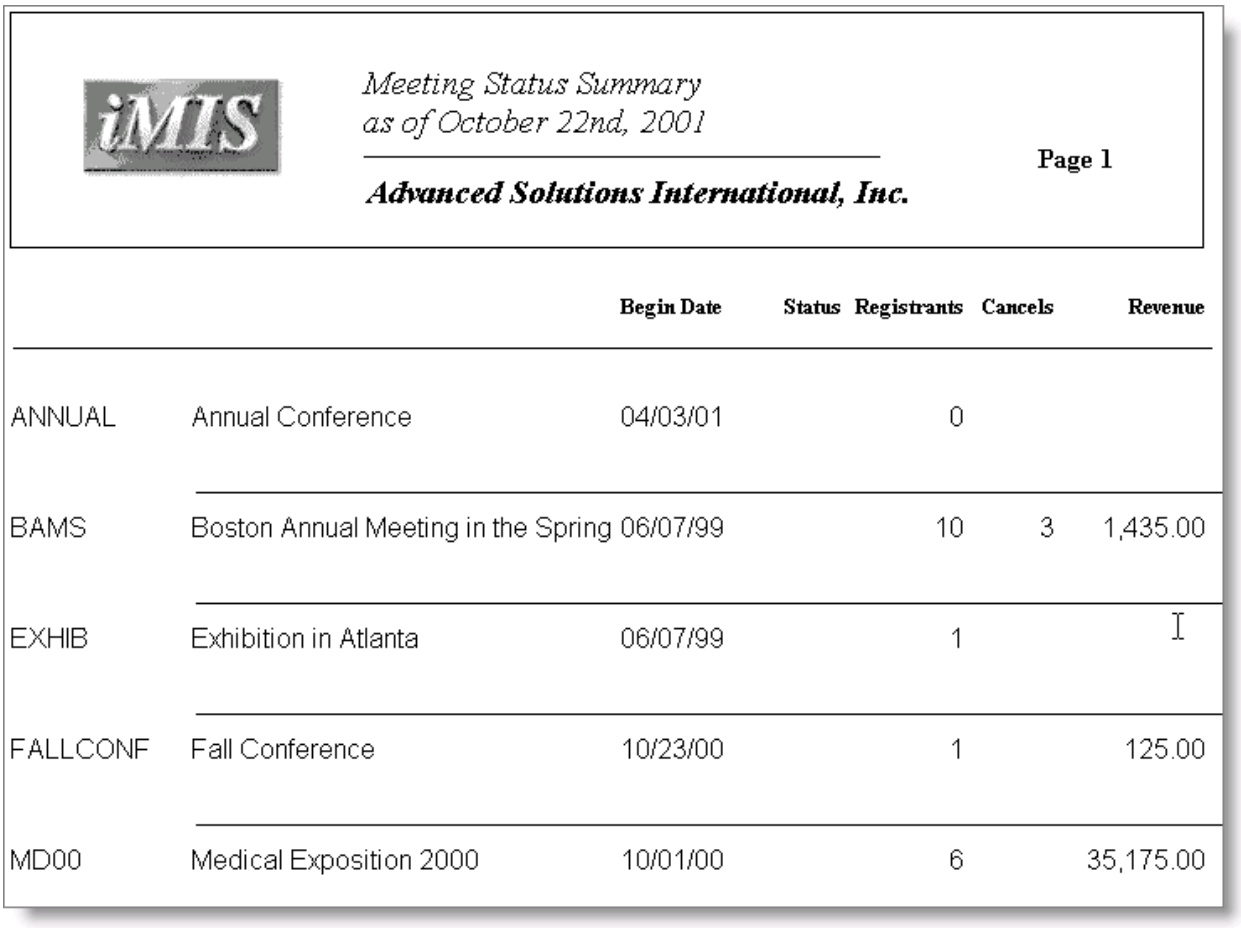
Name		Quantity Payment	Rate/Total Balance
Mr. Peter L. Bachman	Main Registration	0	0.00
American Business Services	Combating Stress on the Job	0	0.00
117 W. Loop South	Tips on Personal Management	0	0.00
Suite 567	0.00	0.00	0.00
Houston, TX 77520			
Phone: (713) 897-5600			
Fax: (713) 897-3459			
Mr. James N. Bondlum	Main Registration	1	150.00
Spybreakers Ltd.	Combating Stress on the Job	1	30.00
102 Goldfinger Lane	Golf Tournament	1	70.00
London, TX 76543-1706	Chairman's Breakfast	1	0.00
Phone: (512) 445-0007	250.00	250.00	0.00
Fax: (512) 445-1007			

Admin Console: Continuum > Events and Orders Reports > Event reports > Rosters

Desktop: Events > Generate reports > Rosters

Meeting Status Summary report

The Meeting Status Summary report prints a summary of all events.



Meeting Status Summary
as of October 22nd, 2001

Advanced Solutions International, Inc.

Page 1

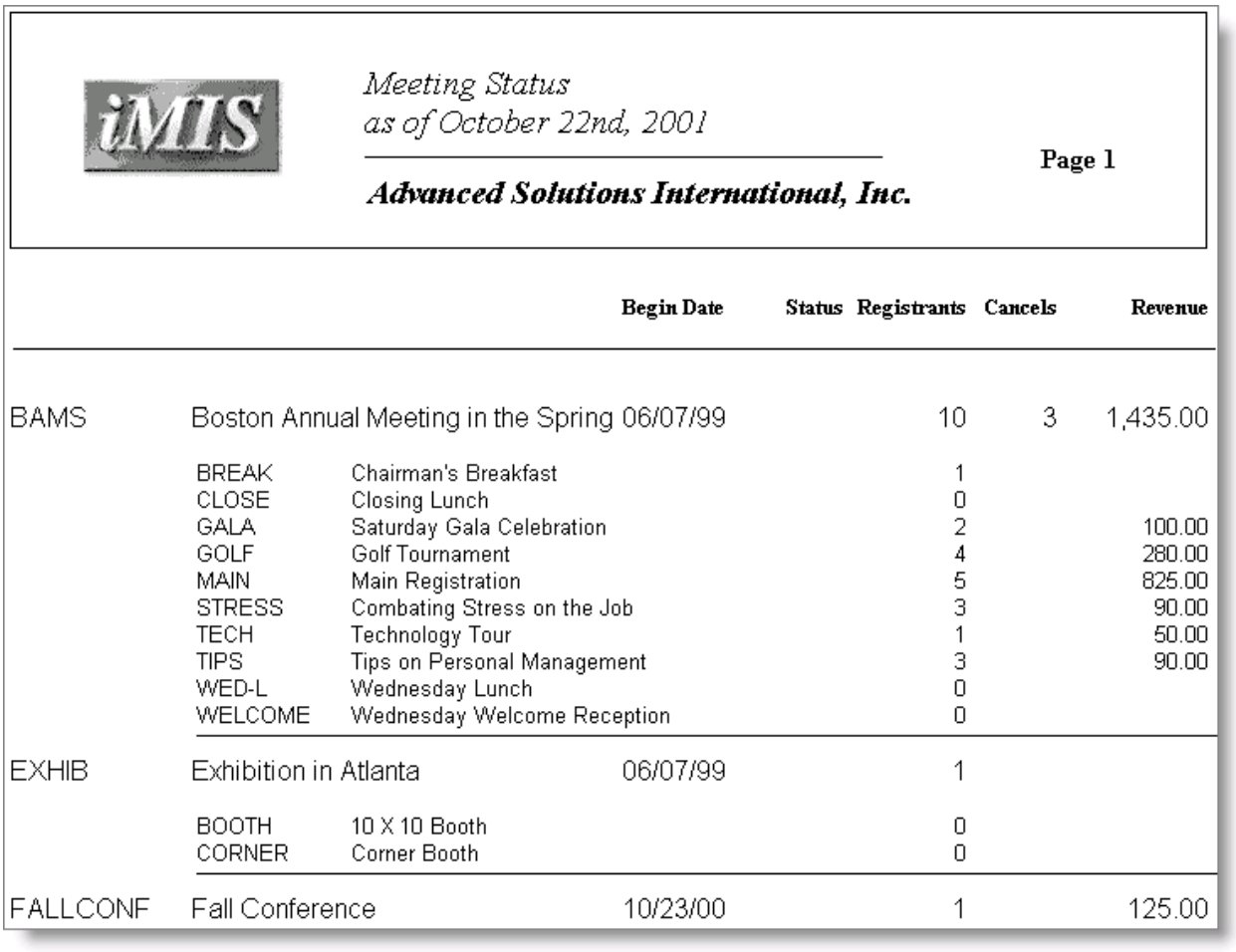
		Begin Date	Status	Registrants	Cancels	Revenue
ANNUAL	Annual Conference	04/03/01		0		
BAMS	Boston Annual Meeting in the Spring	06/07/99		10	3	1,435.00
EXHIB	Exhibition in Atlanta	06/07/99		1		
FALLCONF	Fall Conference	10/23/00		1		125.00
MD00	Medical Exposition 2000	10/01/00		6		35,175.00

Admin Console: Continuum > Events and Orders Reports > Event reports > Status > Meeting Status Summary

Desktop: Events > Generate reports > Status > Meeting Status Summary

Meeting Status report

The Meeting Status report prints the status of all events and functions.



iMIS

Meeting Status
as of October 22nd, 2001

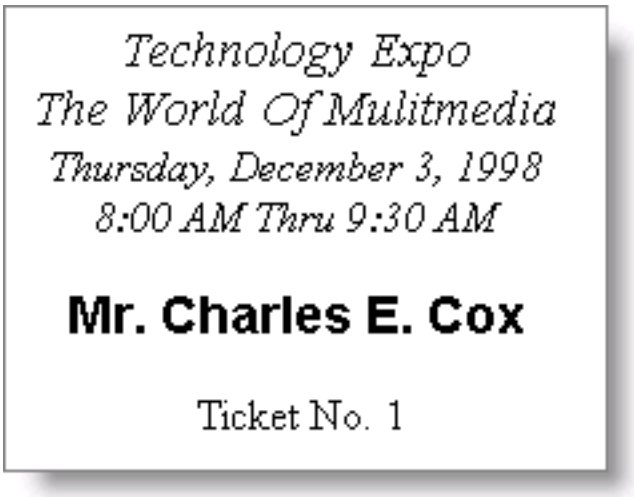
Page 1

Advanced Solutions International, Inc.

			Begin Date	Status	Registrants	Cancels	Revenue
BAMS	Boston Annual Meeting in the Spring		06/07/99		10	3	1,435.00
	BREAK	Chairman's Breakfast			1		
	CLOSE	Closing Lunch			0		
	GALA	Saturday Gala Celebration			2		100.00
	GOLF	Golf Tournament			4		280.00
	MAIN	Main Registration			5		825.00
	STRESS	Combating Stress on the Job			3		90.00
	TECH	Technology Tour			1		50.00
	TIPS	Tips on Personal Management			3		90.00
	WED-L	Wednesday Lunch			0		
	WELCOME	Wednesday Welcome Reception			0		
EXHIB	Exhibition in Atlanta		06/07/99		1		
	BOOTH	10 X 10 Booth			0		
	CORNER	Corner Booth			0		
FALLCONF	Fall Conference		10/23/00		1		125.00

Tickets report

This report prints tickets for ticketed events for output on a laser printer.



Technology Expo
The World Of Mulitmedia
Thursday, December 3, 1998
8:00 AM Thru 9:30 AM

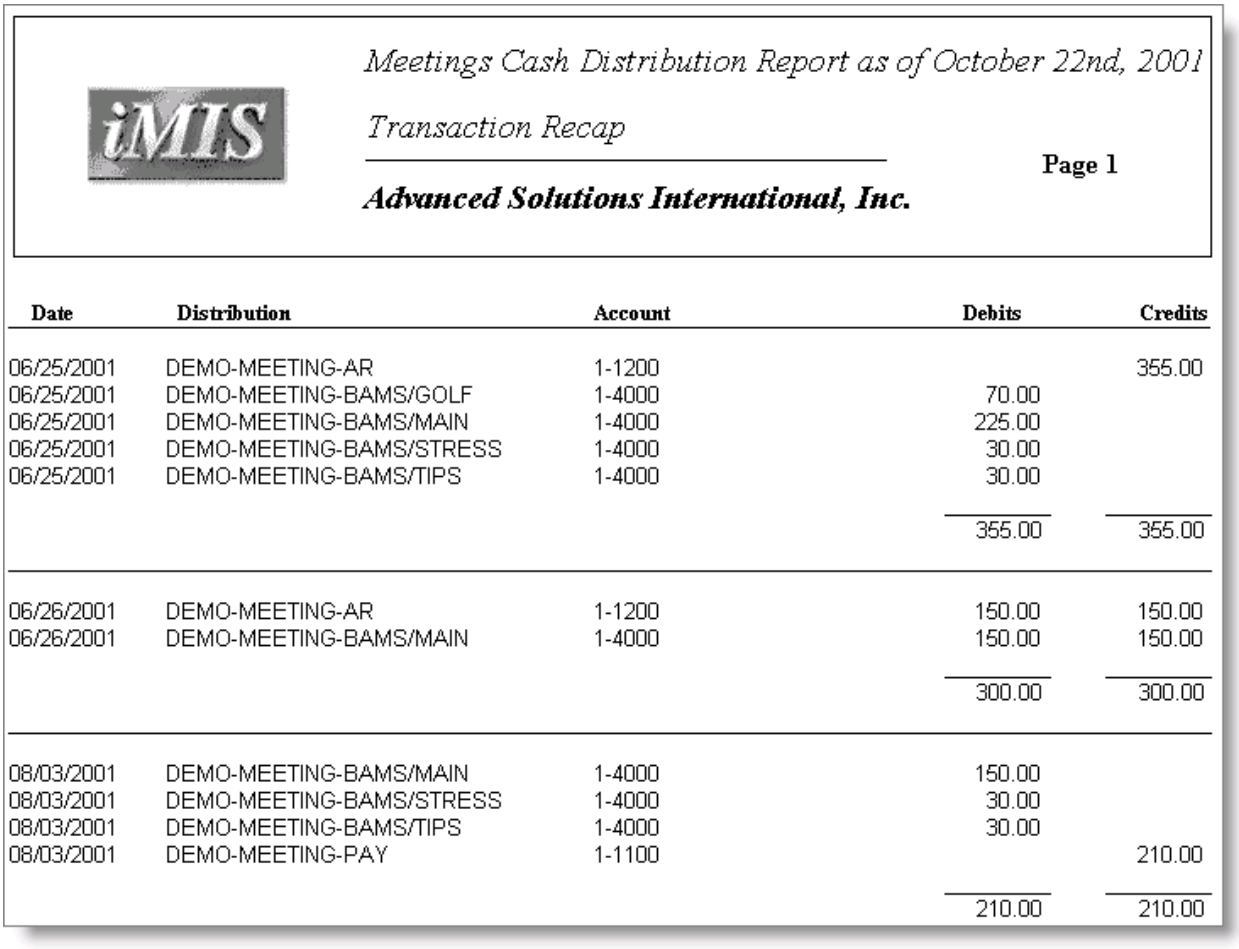
Mr. Charles E. Cox

Ticket No. 1

Admin Console: Continuum > Events and Orders Reports > Event reports > Tickets > Tickets (demonstration style) Desktop: Events > Generate reports > Tickets > Tickets (demonstration style)

Meetings Cash Distribution report

The Meetings Cash Distribution report is a monthly transaction detail report, sorted by income account.



Meetings Cash Distribution Report as of October 22nd, 2001

Transaction Recap

Page 1

Advanced Solutions International, Inc.

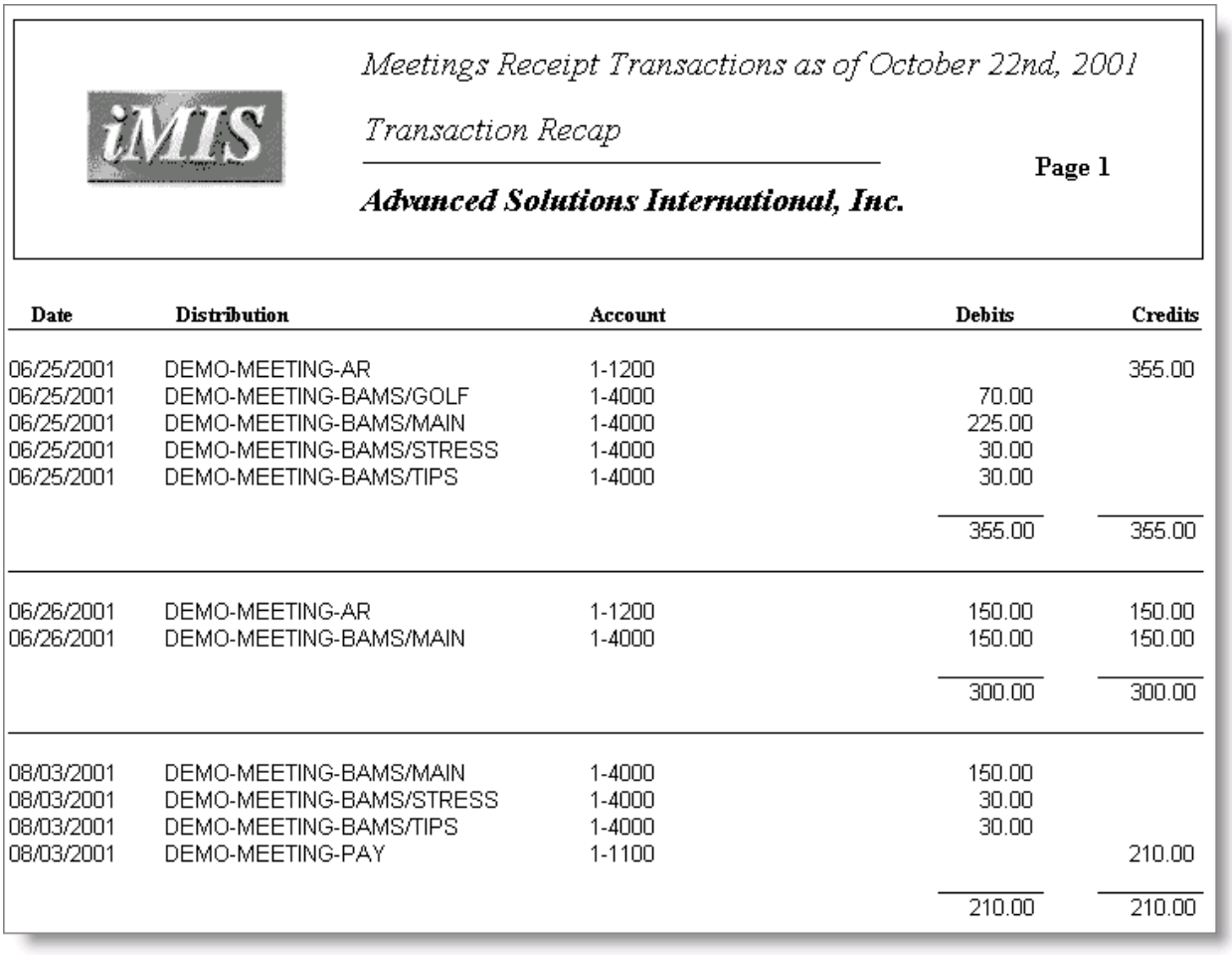
Date	Distribution	Account	Debits	Credits
06/25/2001	DEMO-MEETING-AR	1-1200		355.00
06/25/2001	DEMO-MEETING-BAMS/GOLF	1-4000	70.00	
06/25/2001	DEMO-MEETING-BAMS/MAIN	1-4000	225.00	
06/25/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
06/25/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
			355.00	355.00
06/26/2001	DEMO-MEETING-AR	1-1200	150.00	150.00
06/26/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	150.00
			300.00	300.00
08/03/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	
08/03/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
08/03/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
08/03/2001	DEMO-MEETING-PAY	1-1100		210.00
			210.00	210.00

Admin Console: Continuum > Events and Order Reports > Event reports > Transaction Lists > Meeting Cash Distribution Report

Desktop: Events > Generate reports > Transaction Lists > Meetings Cash Distribution Report

Meetings Receipt Transactions report

The Meetings Receipt Transactions report lists the total meeting definition, including event and function names, descriptions, and standard resources.



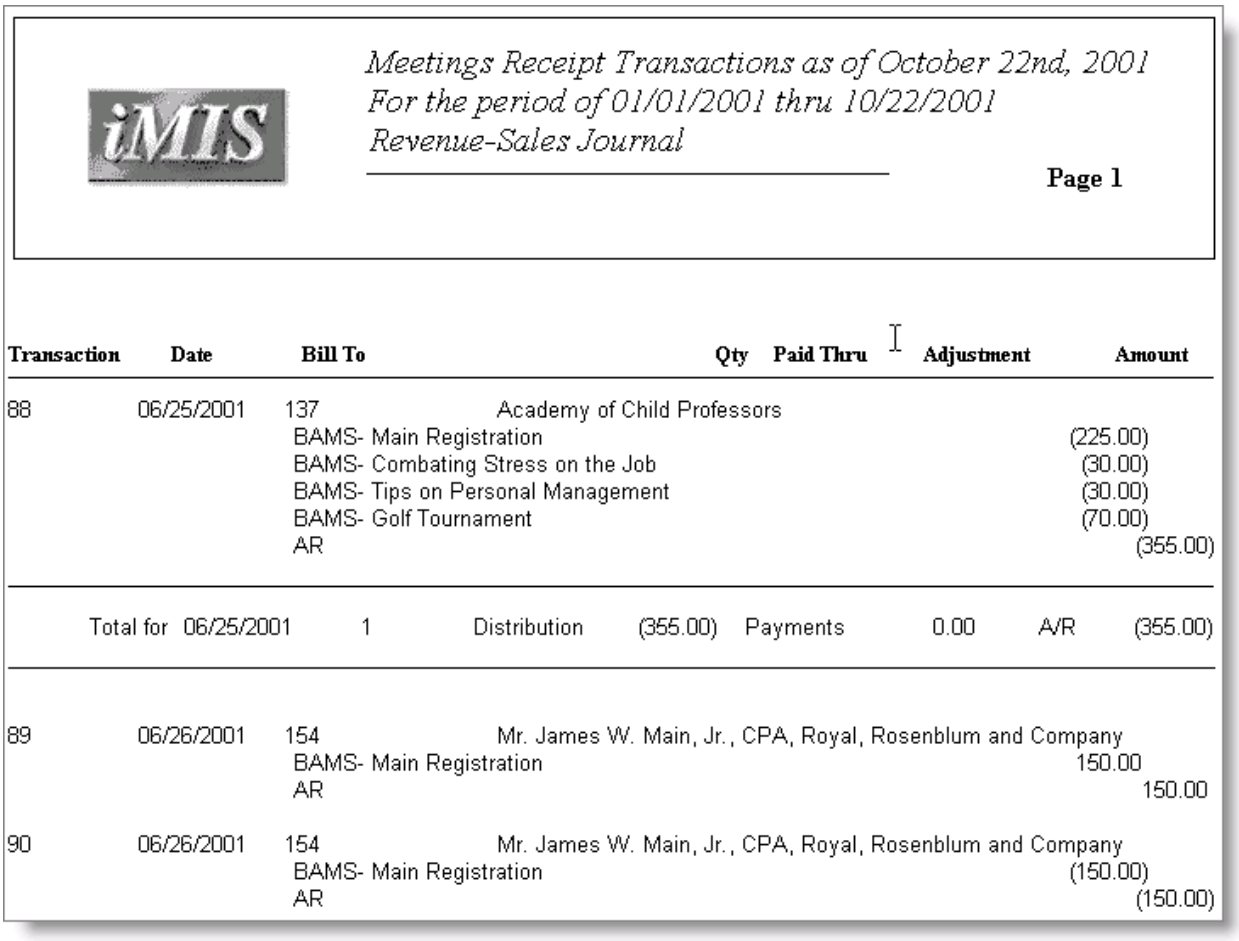
Meetings Receipt Transactions as of October 22nd, 2001

Transaction Recap

Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
06/25/2001	DEMO-MEETING-AR	1-1200		355.00
06/25/2001	DEMO-MEETING-BAMS/GOLF	1-4000	70.00	
06/25/2001	DEMO-MEETING-BAMS/MAIN	1-4000	225.00	
06/25/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
06/25/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
			355.00	355.00
06/26/2001	DEMO-MEETING-AR	1-1200	150.00	150.00
06/26/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	150.00
			300.00	300.00
08/03/2001	DEMO-MEETING-BAMS/MAIN	1-4000	150.00	
08/03/2001	DEMO-MEETING-BAMS/STRESS	1-4000	30.00	
08/03/2001	DEMO-MEETING-BAMS/TIPS	1-4000	30.00	
08/03/2001	DEMO-MEETING-PAY	1-1100		210.00
			210.00	210.00



Meetings Receipt Transactions as of October 22nd, 2001
For the period of 01/01/2001 thru 10/22/2001
Revenue-Sales Journal

Page 1

Transaction	Date	Bill To	Qty	Paid Thru	Adjustment	Amount
88	06/25/2001	137 Academy of Child Professors				
		BAMS- Main Registration				(225.00)
		BAMS- Combating Stress on the Job				(30.00)
		BAMS- Tips on Personal Management				(30.00)
		BAMS- Golf Tournament				(70.00)
		AR				(355.00)
	Total for 06/25/2001	1 Distribution	(355.00)	Payments	0.00	A/R (355.00)
89	06/26/2001	154 Mr. James W. Main, Jr., CPA, Royal, Rosenblum and Company				
		BAMS- Main Registration				150.00
		AR				150.00
90	06/26/2001	154 Mr. James W. Main, Jr., CPA, Royal, Rosenblum and Company				
		BAMS- Main Registration				(150.00)
		AR				(150.00)

Admin Console: Continuum > Events and Orders Reports > Event reports > Transaction Lists > Meetings Receipt Transactions

Desktop: Events > Generate reports > Transaction Lists > Meetings Receipt Transactions

Room Setup report

Room Setup Report as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

Meeting: *Boston Annual Meeting in the Spring* — *Atlanta, GA*

Function: *Tips on Personal Management* — *06/08/1999 9:30 AM*
June 8th, 1999

Times
Set-Up Post Begin 9:30 AM End 11:30 AM

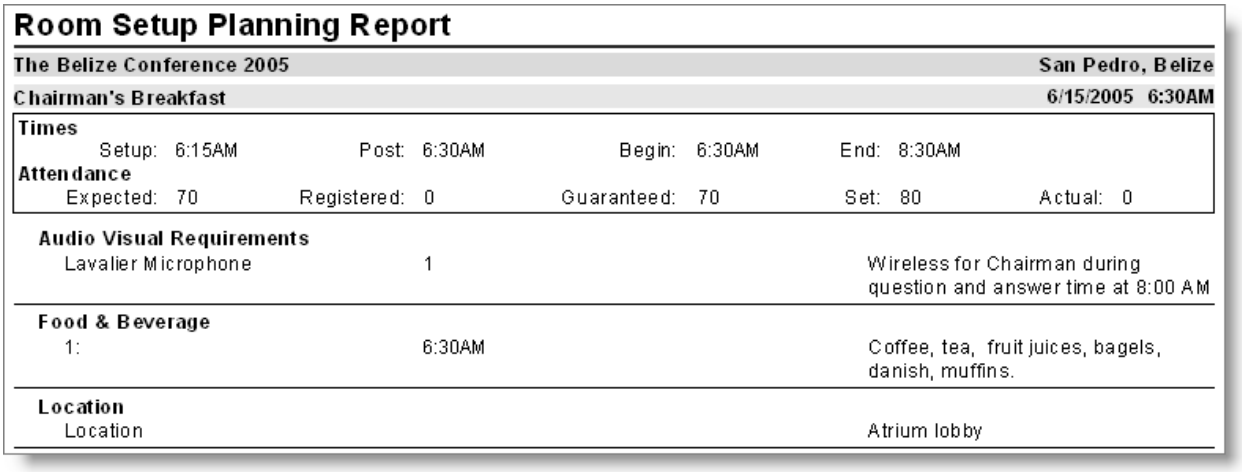
Attendance
Expect 0 Registered 4 Guarantee 0 Set 0 Actual 0

Admin Console: Home > Events > Define an event, double-click an event, double-click an event function, click More> Plan, and click Print

Desktop: Events, select Define an event, double-click an event, double-click an event function, click More> Plan, and click Print

Room Setup Planning Report

The Room Setup Planning report provides the details of Event function plans. It can be run for all of the functions for a single event, for a specific function across different events, or for all functions of all events.



Room Setup Planning Report

The Belize Conference 2005 — **San Pedro, Belize**

Chairman's Breakfast — **6/15/2005 6:30AM**

Times
Setup: 6:15AM Post: 6:30AM Begin: 6:30AM End: 8:30AM

Attendance
Expected: 70 Registered: 0 Guaranteed: 70 Set: 80 Actual: 0

Audio Visual Requirements		
Lavalier Microphone	1	Wireless for Chairman during question and answer time at 8:00 AM
Food & Beverage		
1:	6:30AM	Coffee, tea, fruit juices, bagels, danish, muffins.
Location		
Location		Atrium lobby

Admin Console: Continuum > Events and Orders Reports > Event reports > Planning > Room Setup Planning Report

Desktop: Events > Generate reports > Planning > Room Setup Planning Report

Speaker Evaluation report

You can use several meeting reports to organize the requirements and evaluations before and after the event takes place. This report generates a current snapshot of the function's speaker data.

Room Setup Report as of October 26th, 2001

Page 1

Advanced Solutions International, Inc.

Meeting: *Boston Annual Meeting in the Spring* — *Atlanta, GA*

Function: *Combating Stress on the Job* — *12/11/2001 2:00 PM* *December 11th, 2001*

Times

Set-Up | Post | Begin 2:00 PM | End 4:00 PM

Attendance

Expect 0 | Registered 4 | Guarantee 0 | Set 0 | Actual 0

Speaker 2

153 | Mr. John J. Colby, CPA

Audio Visual

Audio Visual - 10.0000 | Mr. John J. Colby, CPA

Admin Console: Home > Events > Define an event, double-click an event, double-click an event function, click More> Speakers, and click Print

Desktop: Events, select Define an event, double-click an event, double-click an event function, click More> Speakers, and click Print

While the event is open, use the Room Setup report to view function-level speaker data (evaluation criteria, scores, and comments recorded).

Using Hotel Room Reports

The three hotel room reports together provide a comprehensive packet to give to hotel personnel. They itemize the room assignments, the room sharing requested, and the changes that occurred throughout the event registration. These reports are:

- Hotel Room Bookings/Availability
- Hotel Room Change Roster
- Hotel Room Roster

The Hotel Room Roster has an option for including phone numbers, which adds the telephone number of the person with whom to confirm the reservation.

To report on sharing of multiple rooms

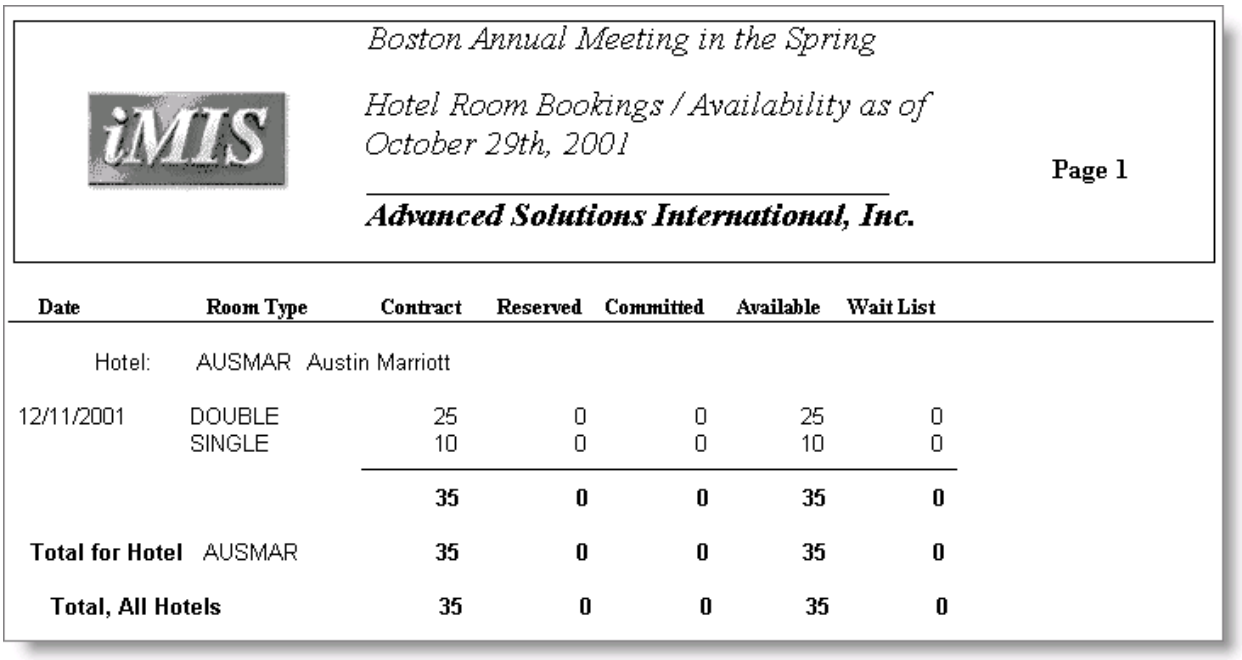
If a primary room holder registers multiple rooms and then shares these rooms, each room appears as a separate event function with the appropriate pricing, and all people sharing with the primary room holder appear under both functions in the report.

Therefore, individuals can appear twice in the Hotel Room Roster report and be shown as sharing both of these functions. The primary room holder is responsible for allocating those rooms within hotel regulations.

Sample Hotel Room reports

Hotel Room Bookings/Availability report

This report shows the number of rooms contracted for the event, and the number of rooms that are currently shown as reserved, committed, available, or on a wait list.



Boston Annual Meeting in the Spring

Hotel Room Bookings / Availability as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

Date	Room Type	Contract	Reserved	Committed	Available	Wait List
Hotel:	AUSMAR Austin Marriott					
12/11/2001	DOUBLE	25	0	0	25	0
	SINGLE	10	0	0	10	0
		35	**0**	**0**	**35**	**0**
Total for Hotel	AUSMAR	**35**	**0**	**0**	**35**	**0**
Total, All Hotels		**35**	**0**	**0**	**35**	**0**

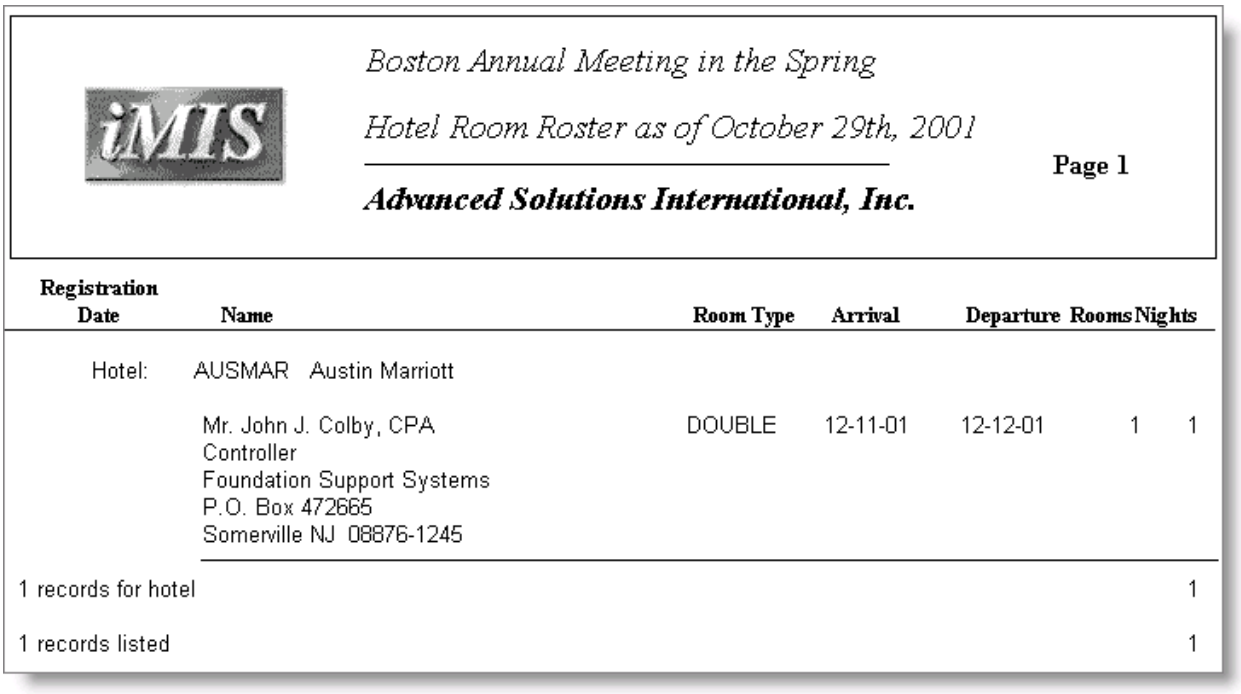
Admin Console: Continuum > Events and Orders Reports > Event reports > Hotel > Hotel Room Bookings / Availability

Desktop: Events > Generate reports > Hotel > Hotel Room Bookings/Availability

Hotel Room Roster report

If you have entered Arrival and Departure dates for all individuals, you can generate the Hotel Room Roster report to get a complete breakdown of who is sharing a room at any one time. Notice that the arrival and departure dates are mandatory only if registering for a room.

iMIS does not warn or control how many people share a room because every hotel has its own rules and capabilities to accommodate this. Instead, generate a Hotel Room Roster report, which allows a hotel auditor to see who is sharing a room and when. As the report indicates, pricing is not split between sharing registrants; billing for the room goes to the primary registrant.



Boston Annual Meeting in the Spring

Hotel Room Roster as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

Registration Date	Name	Room Type	Arrival	Departure	Rooms	Nights
Hotel:	AUSMAR Austin Marriott					
	Mr. John J. Colby, CPA Controller Foundation Support Systems P.O. Box 472665 Somerville NJ 08876-1245	DOUBLE	12-11-01	12-12-01	1	1
1 records for hotel						1
1 records listed						1

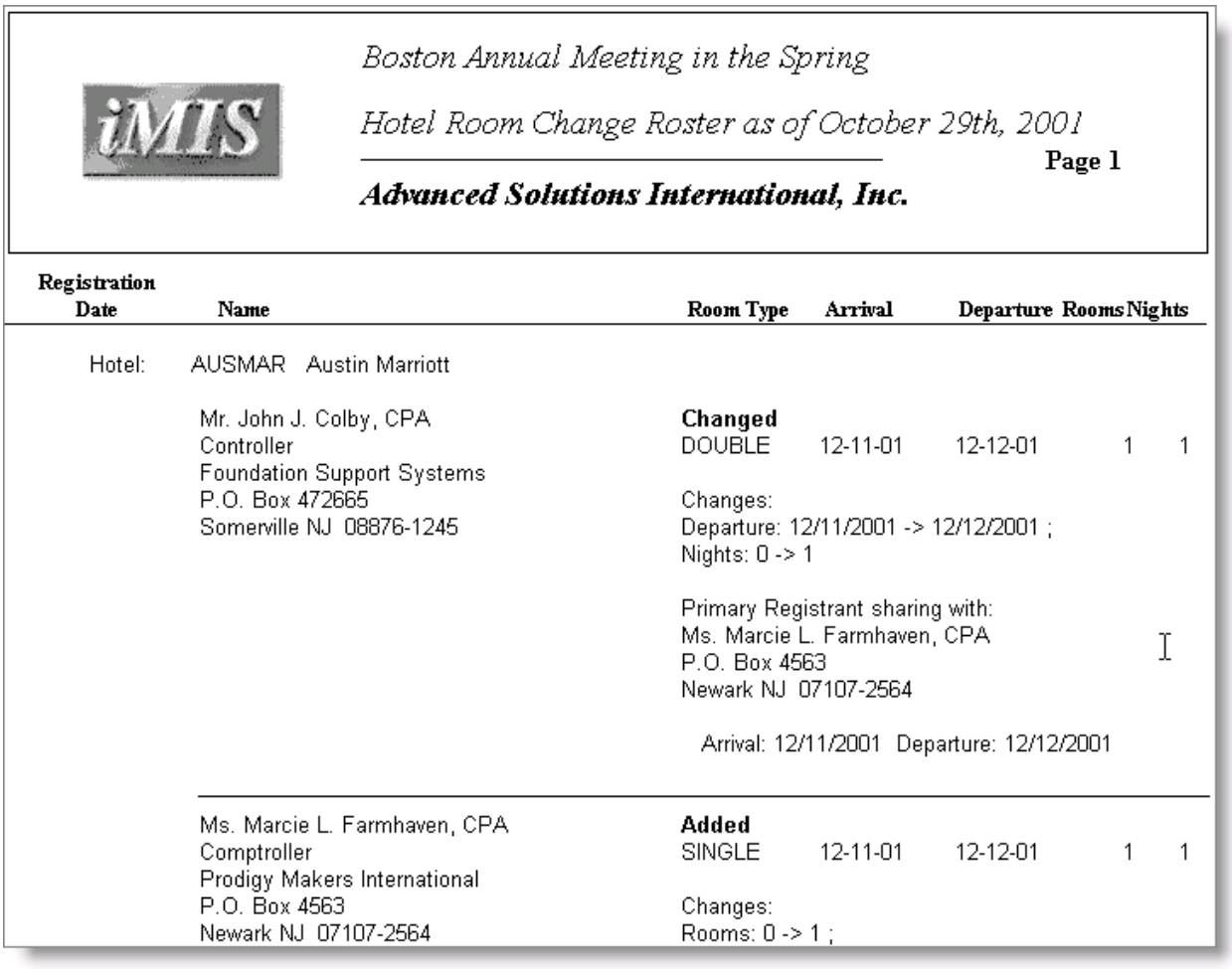
Admin Console: Continuum > Events and Orders Reports > Event reports > Hotel Room Roster

Desktop: Events > Generate reports > Hotel > Hotel Room Roster

Hotel Room Change Roster report

The Hotel Room Change Roster report records housing cancellations. This report sorts registrations by their Added, Changed, or Dropped status.

If a couple is in the Dropped section, you also see them in the Added section, because they had to register for a room to be able to cancel that room. They will also be listed in the Changed section if they had a change before they dropped.



Boston Annual Meeting in the Spring

Hotel Room Change Roster as of October 29th, 2001

Page 1

Advanced Solutions International, Inc.

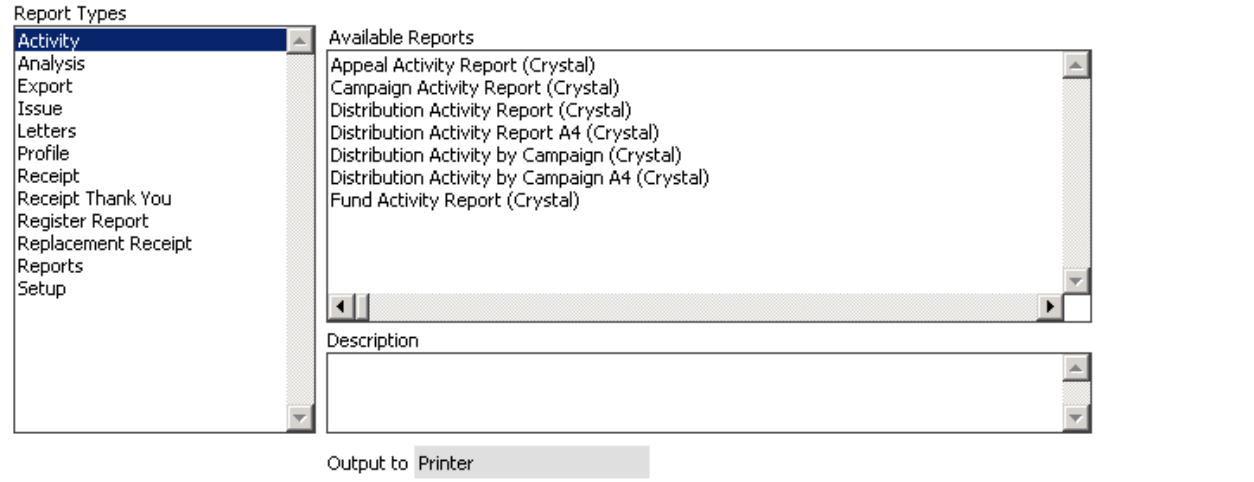
Registration Date	Name	Room Type	Arrival	Departure	Rooms	Nights
Hotel:	AUSMAR Austin Marriott					
	Mr. John J. Colby, CPA Controller Foundation Support Systems P.O. Box 472665 Somerville NJ 08876-1245	**Changed** DOUBLE	12-11-01	12-12-01	1	1
		Changes: Departure: 12/11/2001 -> 12/12/2001 ; Nights: 0 -> 1				
		Primary Registrant sharing with: Ms. Marcie L. Farmhaven, CPA P.O. Box 4563 Newark NJ 07107-2564				
		Arrival: 12/11/2001 Departure: 12/12/2001				
	Ms. Marcie L. Farmhaven, CPA Comptroller Prodigy Makers International P.O. Box 4563 Newark NJ 07107-2564	**Added** SINGLE	12-11-01	12-12-01	1	1
		Changes: Rooms: 0 -> 1 ;				

Admin Console: Continuum > Events and Orders Reports > Event reports > Hotel > Hotel Room Change Roster

Desktop: Events > Generate reports > Hotel > Hotel Room Change Roster

Reports for Fundraising

Fundraising reports window



Admin Console: Continuum > Fundraising reports

Desktop: Fundraising > Generate reports

Report Types

The reports and outputs available through the iMIS Customer Management, Events, and Fundraising modules are generated from information gathered during customer entry, registration entry, gift entry, order entry, and planning processes. The following standard reports are available:

- Activity - Generates a list of activities for individuals.
- Badges - Prints groups of badges using a variety of formats for both continuous-fed and laser printers. (Events only)
- Certificates - Formats and produces continuing education, appreciation, and customer certificates at the event, function, or committee level. (Customer Management and Events)

- Confirmations - Prints confirmation letters or postcards for event registrations. Each printing run consists of the new registrants entered since the last printing run. (Events only)
- Export - Exports a variety of field and file data.
- Hotel - Prints hotel booking/availability, rosters, and transfer information. (Events only)
- Invoices - Prints invoices for event registrations and orders. (Events and Orders only)
- Issue - Prints reminders for donors who have made pledges or who have committed to new gifts on a certain date. (Fundraising only)
- Labels - Prints groups of labels using a variety of sizes and layouts. (Customer Management and Events)
- Letters - Selects letter formats for printing mass mailings for event registrations and other customer activities. (Customer Management, Events, and Fundraising)
- Meetings - Generates event reports from a group of indexes that list the events and related functions. (Events only)
- Order Status - Generates a variety of detailed summary reports on open orders.
- Planning - Generates room setup and general planning reports. (Events only)
- Product - Prints product and product inventory reports.
- Product Transactions - Generates reports on both posted and unposted product inventory transactions.
- Profiles - Prints customer profile information.
- Receipt - Prints receipts. (Fundraising only)
- Receipt Thank You - Prints thank you letters. (Fundraising only)
- Register Report - Prints detailed and summarized reports of receipts printed. (Fundraising only)
- Replacement Receipt - Prints replacement receipts. (Fundraising only)
- Reports - Prints detailed and summarized reports and analyses. (Fundraising only)

- Rosters - Generates a variety of detailed rosters that list registrants or committee members for events or functions.
- Statistics - Generates statistical analysis of data including event registrations and customer participation. (Customer Management only)
- Status - Prints summary reports that recap registration and cancellation counts and fees. (Events only)
- Tickets - Prints personalized tickets for functions. Each printing consists of new registrants entered since the last printing run. (Events only)
- Transaction Lists - Generates accounting audit trail details and recaps reports that list activities based on the transactions generated through AR/Cash, Billing, and Events.

Generating Letters from the Fundraising Overview Tab

To streamline fundraising processes, you can generate thank-you letters directly from the Overview tab of Fundraising, while the donor's record is open.

To generate a Fundraising letter

To generate a letter, the donor record opened must display a valid gift transaction. To access this feature, you must have Word Integration installed on the iMIS system.

1. From Fundraising > Enter and edit gifts, open the gift record for the contact for whom you are generating a letter.

   Note: To generate a letter, the record opened must display a valid gift transaction.

2. Click Letter at the bottom.

   The Fundraising Standard Letters window opens.

3. Choose the letter you want you use from the Fundraising Standard Letters window.

   Note: If you are creating a new letter or editing an existing letter, see To create a new letter or To edit an existing letter.

4. Click Merge.
5. Choose one or both of the following options: Create Activity Records with Merge and/or Create EMAIL Activities Records with Merge.
6. Click Continue.
7. A dialog box prompts: The System has X Activities to insert. Do you wish to write these activities? Click Yes or No. Microsoft Word opens and displays the Template.
8. To create the merged output, select Merge to New Document from the Word toolbar.
9. To print the letter, select File > Print.
10. Select File > Save As to save the letter to a folder on your computer.

To create a new letter

1. Click New.

   The New Standard Letter window opens.
2. Complete the Report Title and Report File fields.
3. Click OK.

   Microsoft Word opens.
4. Create the letter by selecting merge fields and entering text.
5. When you finish, click the Save icon or select File> Save.
6. To save the letter to another location outside of iMIS, select File> Save As and save a copy in another location.
7. Close Microsoft Word.

To edit an existing letter

1. Select the title of the letter you wish to edit and click OK.

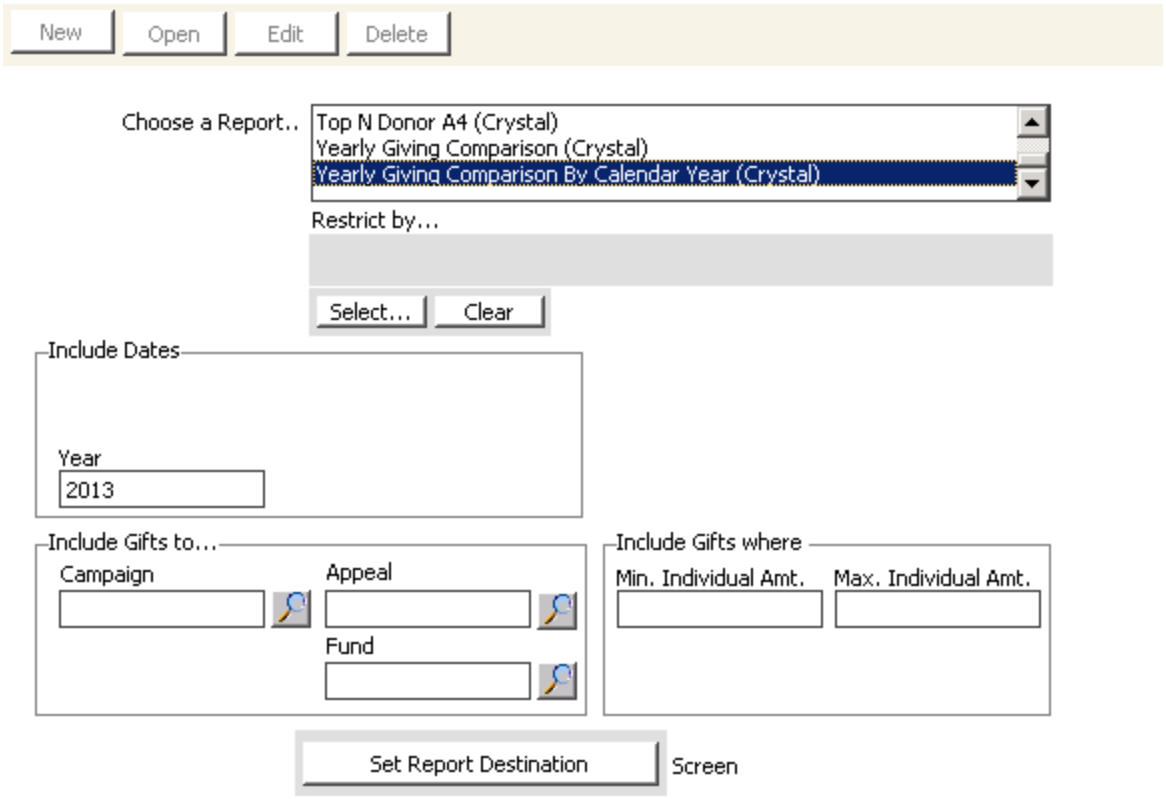
2. Once the letter opens in Microsoft Word, edit it.
3. When you finish, select File> Save.
4. If you also want to save the letter to another location outside of iMIS, you can select File> Save As and save a copy in another location.
5. Close Microsoft Word.

Generating executive reports in Fundraising

The Generate executive reports window is an abbreviated version of the Fundraising Generate reports window. The Generate executive reports window allows you to generate several of the detail and summary reports that are available in the Fundraising Generate reports window. The Generate executive reports window is just that - a window designed to allow the fundraising executive to view or print detail or summary reports of gifts, pledges, and donor clubs, and to view or print comparisons between current and previous time periods - all without having to go to the Generate reports window.

The Generate executive reports window has some limitations. You cannot rename reports in the Generate executive reports window, nor can you export, issue, or run letters reports as you can in the Generate reports window.

Executive reports window



Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate executive reports

Choose a Report

This area contains a scrolling list of all reports available from the Generate executive reports window. For each available report displayed in this area, you can select either a detail or summary report by enabling either the Detail or Summary option.

- Pledge - Select this report to generate either a detail or summary report of all pledges entered. Subtotal the report by sorting on any of the options in the Sort & Summarize by area of the window except Donor Club and Meeting. The report lists the amounts pledged and paid as well as balances remaining. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date.

- Giving - Select this report to generate either a detail or summary report of all gifts and pledge/installment payments. Subtotal the report by sorting on any of the options in the Sort & Summarize by area of the window except Donor Club and Meeting. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date.
- Prev/Curr Period - Select this report to generate a detail or summary list of gifts given per user-selected sort, comparing these amounts between two defined time periods. These reports show the difference in amounts and the percentage of change, with single gifts and pledges broken down by fund. To run the Prev/Curr Period report, you must enter values in the Comparison to Previous Period From and Thru date fields.
- Donor Club - The Donor Club Detail (lndscape) report allows you to generate a list of all individuals who have attained a donor club, subtotaled by individual donor clubs with a total of all donor clubs achieved. The report displays the date the donor club was achieved and the Solicitor, Donor, List As, Fund, Campaign, and Appeal associated with each donor club. Subtotal the report by sorting on any of the options in the Sort and Summarize by area except Meeting and Donor Club. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date. The solicitor is determined by the solicitor specified in the Solicitor field on the Donor Data tab on the Manage customers window (from Customers, select Manage customers, open a customer record, and select the Donor Data tab) rather than the solicitor specified in the Solicitor field on the Enter and edit gifts window (from Fundraising, select Enter and edit gifts).
- The Donor Club Summary report lists only the fund, campaign, and appeal codes for each specified donor club. The solicitor is determined by the solicitor specified in the Solicitor field on the Donor Data tab on the Manage customers window rather than the solicitor specified in the Solicitor field on the Enter and edit gifts window. Selecting the Summary option allows you to generate a list of all donor clubs achieved. Subtotal the report by sorting on any of the options in the Sort & Summarize by area of the window except Meeting and Donor Club. Search on Member ID, All Members, Member Type, Solicitor ID, Fund, Campaign, Appeal, and Transaction Date.

Sort & Summarize by

Select from the following options to sort and summarize your report:

- Date - Subtotal your report by sorting by date or date range. The date cannot be selected for Prev/Curr Period reports.
- Fund - Subtotal your report by sorting on Fund. This sorting option is available for all applicable reports.
- Campaign - Subtotal your report by sorting on Campaign. This sorting option is available for all applicable reports.
- Appeal - Subtotal your report by sorting on Appeal. This sorting option is available for all applicable reports.
- Member Number - Subtotal your report by sorting on the donor's customer ID. This sorting option is available for all applicable reports.
- Solicitor - Subtotal your report by sorting on solicitor. This sorting option is available for all applicable reports. In all reports except for the Donor Club reports, the solicitor entered in the Solicitor field on the Enter and edit gifts window restricts each report. The Donor Club reports search on the solicitor entered in the Solicitor field on the Donor Data tab on the Manage customers window.
- Donor Club - Subtotal your report by sorting on donor club. This sorting option works only for Donor Club Detail and Donor Club Summary reports.
- Meeting - Subtotals report by sorting on events. This sorting option is available only for Donor Club reports.

Restrict by

There are several options in this area of the window for restricting report output.

Member - Enter the customer ID for the report, or click the lookup icon to select an ID.

Select - (optional) Lets you open the Member/Contact Selections window to select customer type options for setting your report parameters. All is the default. You can select from one of the following options:

- All (all customer types)
- Members
- Non Members
- Specific Types
- All (all company and individual customers)
- Company Only
- Individual Only

> **Note:** Note: If you select the Specific Types field, a blank field displays where you can enter one or more customer types (to enter multiple customer types, enter a comma (but no space) between customer types).

Clear - Lets you clear the values entered on the Member/Contact Selections window.

Solicitor

(optional) Enter the customer ID of the solicitor associated with the report, or click the lookup icon to select an ID.

Gifts To

Enter an Appeal, Campaign, and Fund for your report in these fields. You can click the lookup icon to select an appeal, campaign, or fund code. For all reports except Donor Club reports, the Appeal, Campaign, and Fund are determined by the information that was entered in the Appeal, Campaign, and Fund fields on the Enter and edit gifts window (from Fundraising, select Enter and edit gifts).

Date

Enter the beginning date for the reporting period. The system searches on the actual transaction date for all reports except for Prev/Curr Period reports.

Thru

Enter the report ending date.

Comparison to Previous Period

The following fields and options are used in conjunction with the Prev/Curr Period reports:

- From - Enter the beginning date of the previous comparison period.
- Thru - Enter the ending date of the previous comparison period.
- All - Enable to print all records for the specified time period. This is the default value.
- Lapsed - Enable to print a record with subtotals that have previous amounts and zero current period amounts.
- Decreased by - Enable to print records with a specified subtotal where the percentage change is equal to (=) or less than (<) the percentage specified in the Percent field.
- New - Enable to print only records with subtotals in the current period and zero amounts in previous time periods.
- Increased by - Enable to print only records with a specified subtotal where the percentage change is equal to (=) or greater than (>) the percentage specified in the Percent field.
- Percent - Enter the percentage for a Decreased by or Increased by comparison.

Detail

Enable to specify a detail report.

Summary

Enable to specify a summary report.

Set Report Destination

Opens the Set report destination window to set the report output destination. The initial default output device is Printer. You can change the default output device and save this setting (select File> Report Destination, select the desired default output device, and click Save) so that the desired default output device is selected each time you start iMIS.

Note: Note: Set the report destination to Screen to avoid the unnecessary printing of reports.

Note: Note: To print the report, from the Report Destination window select the Printer option rather than printing the report from the screen. The printed reports will not align exactly as they appear on the screen if you print them from the screen; printing from the Printer option will prevent this problem.

To generate reports in the Generate executive reports window

1. From Executive reports, click New.
2. From Choose a Report, select a report.
3. Select the search options for the report. The options available vary based on the report selected.
4. Click Run.

To upgrade a cloned Fundraising Profile Crystal report

If you cloned a Fundraising Profile Crystal report for use in a previous iMIS release, make sure you add the date range parameters to the cloned report description, or the report will not print - from the Fundraising History window or any location in iMIS. (The standard Fundraising Profile Crystal report specification file is updated automatically when you upgrade to iMIS 10.5. You need to manually update this type of report specification file only if you created a clone and saved it with a customized name or location.)

To add date range parameters manually to a cloned Fundraising Profile Crystal report specification file, use the following steps.

1. Select Utilities > Report Specs.

2. In the Report Specifications window, select the cloned Fundraising Profile Crystal report from the list, then click Parameters.
3. In the Detail Report Parameters window, click Edit, then click Crystal Params.
4. In the Crystal Parameters window, add the new parameters:

- BeginDate

  Select Insert. In Parameter Name, enter BeginDate. In Variable Name (or String), enter RV.BeginDate.

- EndDate

  Select Insert. In Parameter Name, enter EndDate. In Variable Name (or String), enter RV.EndDate.

5. Click OK in the Crystal Parameters window.
6. Click Save in the Detail Report Parameters window.
7. Close the Detail Report Parameters and the Report Specifications windows.

Fundraising Receipts

Receipt Reports

The Fundraising module offers several receipting reports. All of these reports are Crystal reports, which can be customized.

Receipt (Conforms to the Canadian tax publication IT-110R3 Interpretation Bulletin for Gifts and Official Donation Receipts)	Sample Auto Receipt	Generates a receipt that includes the following fields: Registration Number, Receipt Number, Issued Date, Amount, and Original Receipt Number
Receipt Thank You	Sample Thank You	Sample receipting thank you letter that includes receipt amount and breakdown of gifts received
Register Report	Sample	Sample register report that includes a

	Register Report 1	detail report of receipts printed
Register Report	Sample Register Report 2	Sample register report that includes a summary of receipts printed
Replacement Receipt (Conforms to the Canadian tax publication IT-110R3 Interpretation Bulletin for Gifts and Official Donation Receipts)	Duplicate Receipt	Generates a duplicate receipt that includes the following fields: Registration Number, Receipt Number, Issued Date, Amount, and Original Receipt Number

Assigning Receipting Intervals to Customer Records

One of the benefits of the Fundraising receipting function is the ability to assign receipting intervals to donors. For example, if you set the receipting interval to annual, the donor receives one receipt per year.

Other donors may have a monthly donation schedule and receive a receipt every 30 days. By enabling a receipting interval option, the donor's receipts are filtered out from the rest of the auto-generated receipts until the desired receipting interval has passed.

The Last Receipt Date field on the Donor Data tab of the Manage customers window is updated when a receipt is issued. The last date that a receipt was printed for the donor is displayed on the Donor Data tab.

Receipts are printed when the interval preference is greater than or equal to the difference between the current receipts issued date (system date) and the donor's Last Receipt Date. For example, a donor's receipt interval is set to Monthly and the donor makes a new gift (with payment) within 30 days after their last receipt was printed. If an auto-receipt run is initiated on the 31st day after the last receipt was printed, a receipt

prints for the gift. However, a receipt does not print if a receipt run is initiated within 30 days after the donor's last receipt was printed.

Receipting intervals for customers are selected in the customer's Donor Data tab on the Manage customers window. See Adding Fundraising Information to a Customer Record.

Generating Receipts

Gift receipts are not generated until you run the auto-receipting batch query report. You can also generate receipts if batch control is not enabled. You cannot edit a gift after a receipt has been issued for the gift because an accounting record has been generated. With the Fundraising module, you can print receipts, thank you letters, and register reports in one linear process or you can print each separately.

> **Note:** Note: If you use multiple entities, batch control should be enabled.

Printing receipts uses the same batch logic that is used in AR/Cash and Billing. A batch is used to select and group receipts. It also can be used as part of the selection criteria for other receipting reports. You can select an AR/Cash batch that has been used to record payments, or you can use a receipt batch created for receipting purposes only.

> **Note:** Note: If you use a mixed batch (one that contains receipts and payments) and post the batch, you cannot open the batch to print thank you letters or register reports unless you change the batch's status to open. However, you can enter the closed batch name or number as selection criteria for thank you letters, register reports, or replacement receipts.

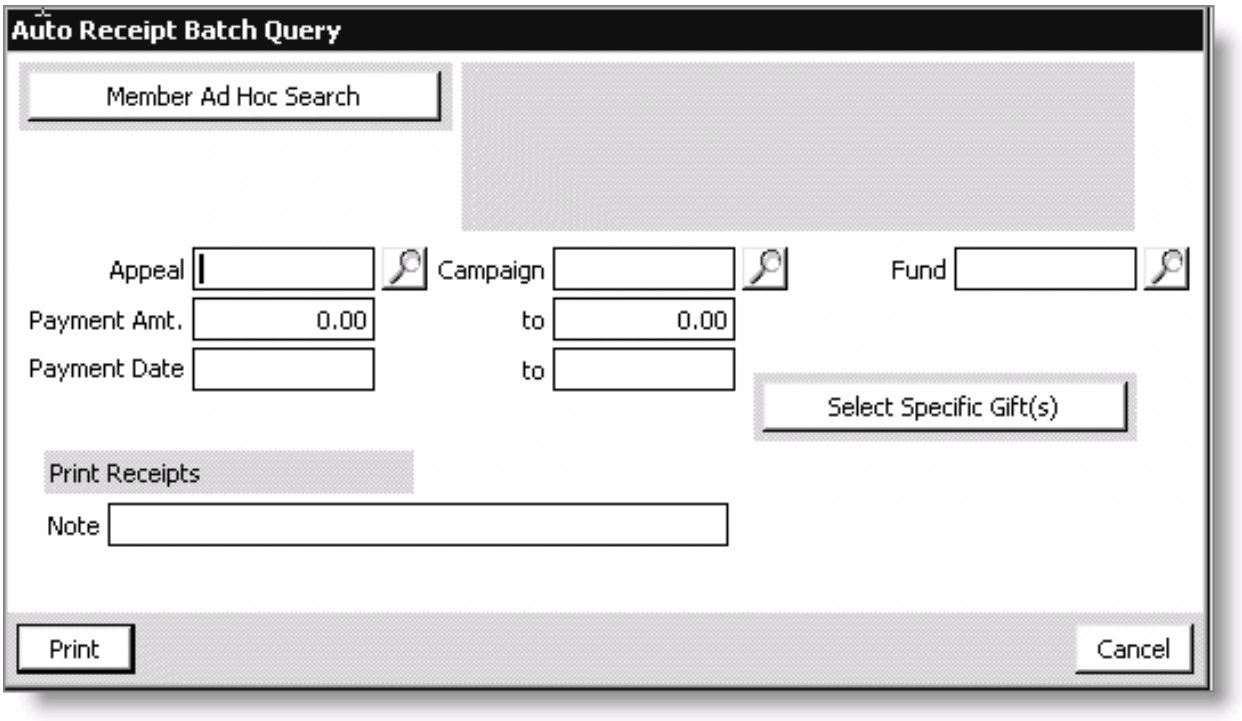
Auto Receipt Selection Criteria

You can select from several methods for printing receipts:

- Set a Receipting Interval at the donor level.
- Use selection criteria from the Auto Receipt Batch Query window.
- Conduct an ad hoc search from the Select Search Instructions window.

- Use selection criteria from the Select Specific Gift(s) window.
- You can generate receipts from the Auto Receipt Batch Query window.

  Auto Receipt Batch Query window



Admin Console: Continuum > Fundraising reports > Receipt > Sample Auto Receipt (Crystal)
Desktop: Fundraising > Generate reports > Receipt from the Report Types list > Sample Auto Receipt (Crystal)

Member Ad Hoc Search

(optional) Enables you to display the Select Search Instructions window for options to conduct an ad hoc search.

Appeal

(optional) Enter the appeal to be included in the search criteria for the auto receipt report.

Campaign

(optional) Enter the campaign to be included in the search criteria for the auto receipt report.

Fund

(optional) Enter the fund to be included in the search criteria for the auto receipt report.

Payment Amt

(optional) Enter the minimum payment amount for the payment amount range criteria for issuing the receipts.

to

(optional) Enter the maximum payment amount for the payment amount range criteria for issuing the receipts.

Payment Date

(optional) Enter the beginning payment date range criteria for issuing the receipts.

to

(optional) Enter the ending payment date range criteria for issuing the receipts.

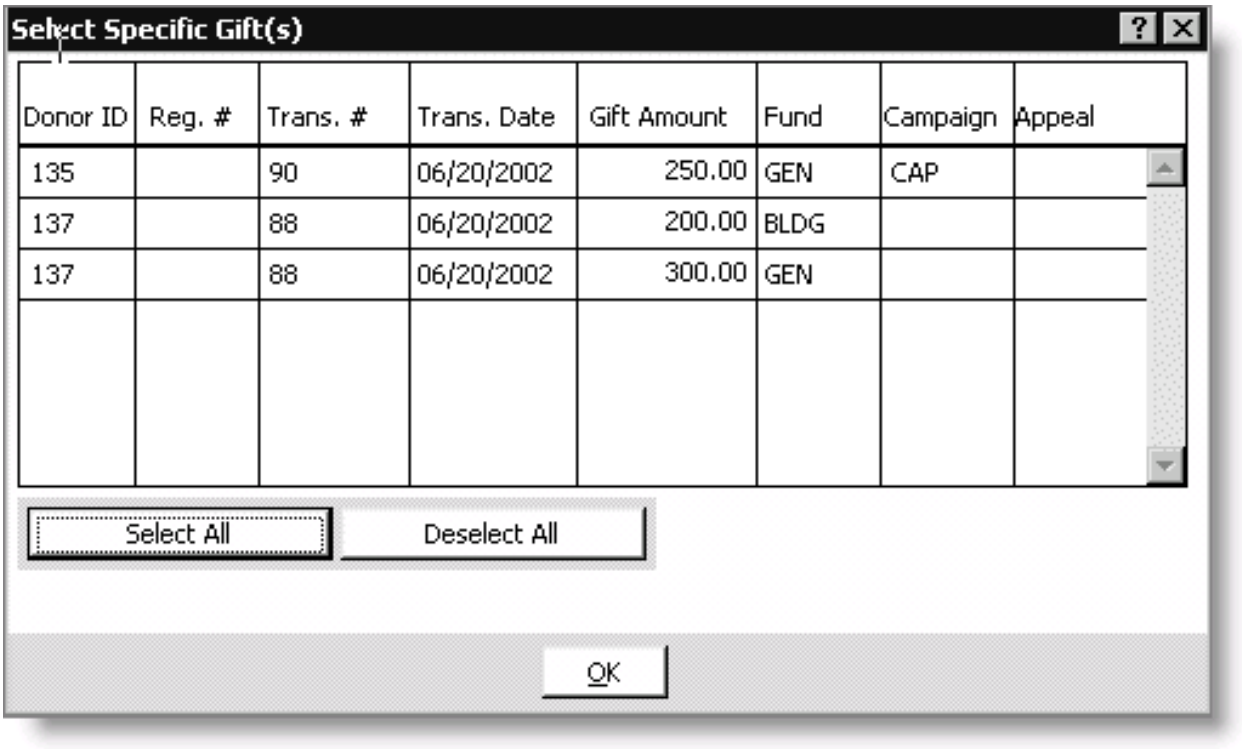
Select Specific Gift(s)

(required) Enables you to display the Select Specific Gift(s) window to select from a list of gifts. You cannot print receipts unless you click this button and select at least one gift in the Select Specific Gift(s) window.

Note

Enter additional information to be printed on the receipt.

Select Specific Gift(s) window



Use the Select Specific Gift(s) window to select specific gifts for donation receipts after the search criteria have been entered on the Auto Receipt Batch Query window. You may also use the Select Specific Gift(s) window as the sole selection of gifts for donation receipts.

Donor ID

Displays the customer ID number of the donor associated with the gift.

Reg #

Displays the registration number of the fund or organization associated with the gift.

Trans #

Displays the transaction number associated with the gift.

Trans Date

Displays the date of the transaction associated with the gift.

Gift Amount

Displays the amount of the gift.

Fund

Displays the fund associated with the gift.

Campaign

Displays the campaign associated with the gift.

Appeal

Displays the appeal associated with the gift.

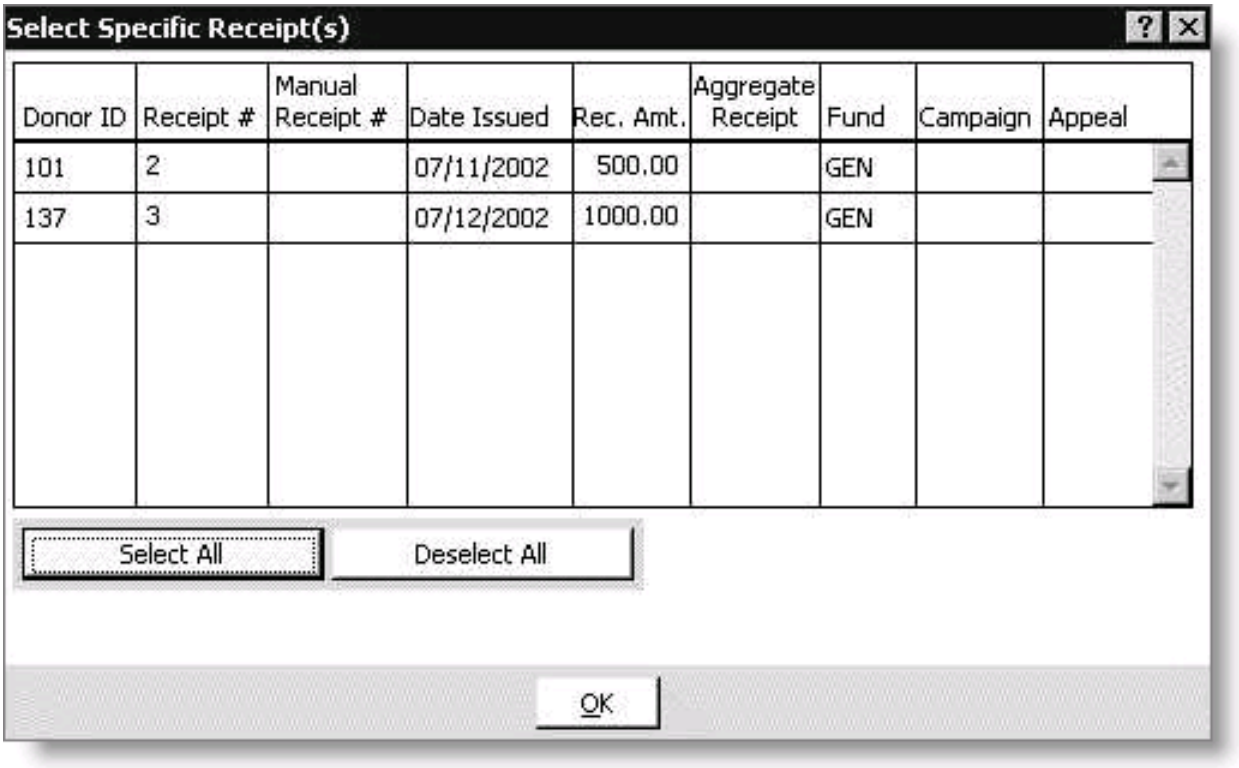
Select All

Enables you to select all the gifts in the window.

Deselect All

Enables you to deselect all selected gifts in the window.

Select Specific Receipt(s) window



Admin Console: Continuum > Fundraising Reports > Receipt Thank You > Sample Thank You (Crystal)
Desktop: Generate reports > Receipt Thank You from the Report Types list > Sample Thank You (Crystal)

Use the Select Specific Receipts(s) window to select specific receipts for thank you receipts after the search criteria have been entered on the Auto Receipt Batch Query window. You may also use the Select Specific Receipts(s) window as the sole selection of receipts for thank you receipts.

Donor ID

Displays the customer ID number of the donor associated with the receipt.

Receipt #

Displays the automatically generated receipt number.

Manual Receipt #

Displays the manual receipt number.

Date Issued

Displays the date the receipt was issued.

Rec Amt

Displays the receipt amount.

Aggregate Receipt

Displays Yes if the receipt is an aggregate receipt.

Fund

Displays the fund associated with the receipt.

Campaign

Displays the campaign associated with the receipt.

Appeal

Displays the appeal associated with the receipt.

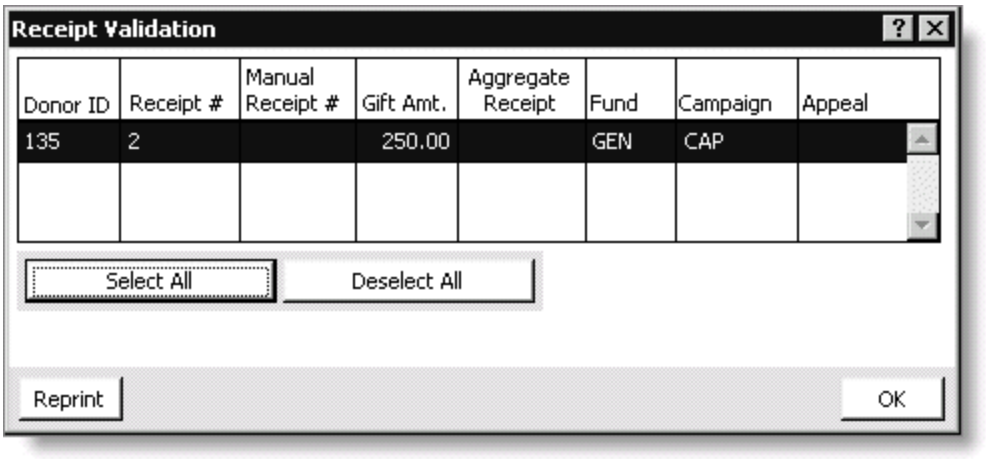
Select All

Enables you to select all the gifts in the window.

Deselect All

Enables you to deselect all selected gifts in the window.

Receipt Validation window



Admin Console: Continuum > Fundraising Reports > Receipt > Sample Auto Receipt (Crystal)
Desktop: Fundraising > Generate reports > Receipt > Sample Auto Receipt (Crystal)

After you print receipts, you can either validate or reprint the receipts. All receipt numbers in the current batch that have been printed are listed in the Receipt Validation window.

Donor ID

Lists donors by ID number.

Receipt #

Lists receipt numbers for recently printed receipts.

Manual Receipt #

Lists manual receipt numbers for recently issued receipts.

Gift Amt

Lists gift amounts for the recently issued receipts.

Aggregate Receipt

Displays Yes if the receipt is an aggregate receipt.

Fund

Displays the fund associated with the printed receipt(s).

Campaign

Displays the campaign associated with the printed receipt(s).

Appeal

Displays the appeal associated with the printed receipt(s).

Select All

Enables you to select all the receipts in the window.

Deselect All

Enables you to deselect all the receipts in the window.

Reprint

Enables you to reprint all selected receipts in the window.

Note: Note: When you click the OK button, you are prompted to print a thank you letter report and a register report. Before you click OK, verify that the receipts printed correctly. After you click OK, the receipts cannot be reprinted. However, the original receipts can be canceled and you can issue replacement receipts with new receipt numbers.

To generate auto receipts

When issuing receipts, you are prompted to issue thank you letters and register reports during the process. You can issue these additional reports at this time or to postpone printing them.

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt from the list of Report Types.
3. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Auto Receipt Batch Query window opens.
6. Enter the search parameters for finding the receipts.
7. Click Select Specific Gift(s).

   The Select Specific Gift(s) window opens.

- If you did not enter specific search criteria in the Auto Receipt Batch Query window and only clicked Select Specific Receipt(s), a confirmation message is shown before the list of receipts is built. Click Yes to proceed.

  The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a thank you receipt was printed or not.

8. Select the gifts for which to generate receipts, or click Select All to select all of the gifts.
9. Click OK to return to the Auto Batch Receipt Query window.
10. (optional) Add a note of up to 30 characters in the Note field. This information is printed on all receipts generated in this batch.
11. Click Print.
12. Click OK to print the receipts.
13. (optional) To reprint the receipt, click Reprint.
14. Click OK after you have checked the receipts and verified that they have printed correctly.

A message asks if you want to print the thank you letter now.

To print the thank you letter:

- Click Yes.
- Click OK.
- The Fundraising Reports window opens.
- Select the Sample Thank You (Crystal) report.
- Click OK.

A message asks if you want to print the Register Report.

15. To print the Register Report, click Yes.
16. Click OK.

    The Fundraising Reports window opens.
17. Select the Register Report to print and click OK.

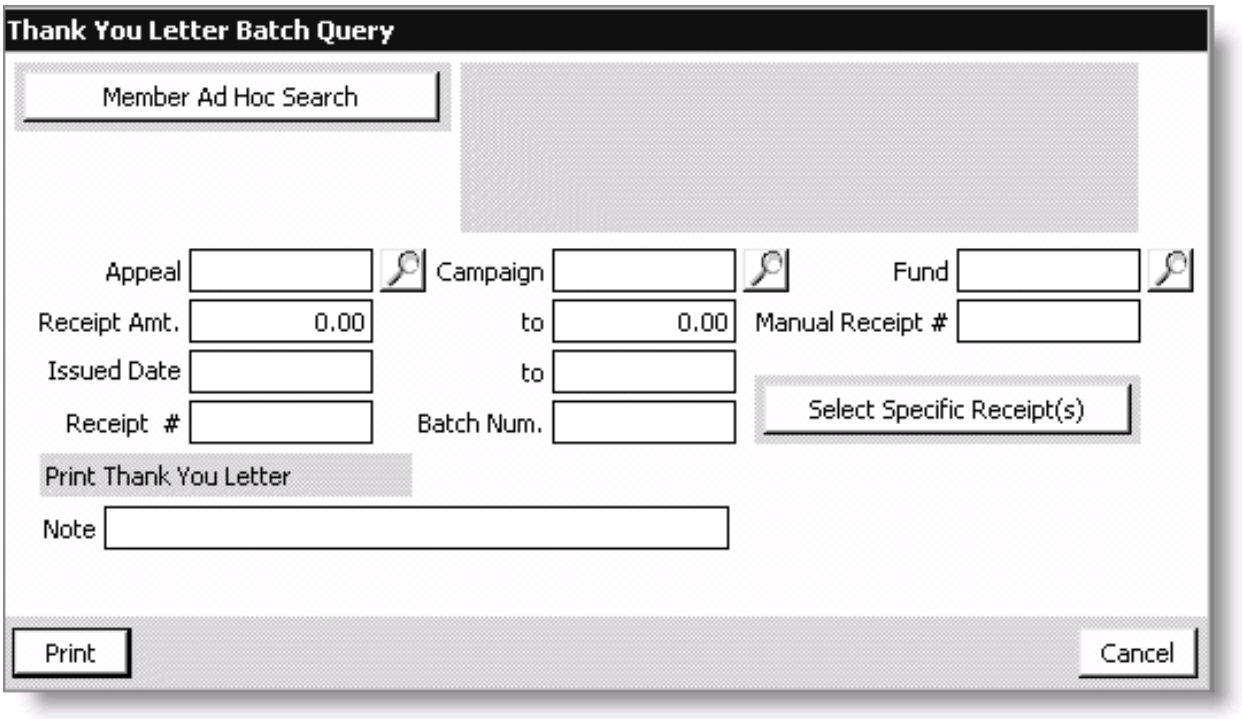
To print a thank you letter after auto receipting

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt Thank You from the list of Report Types.
3. Select Sample Thank You (Crystal) from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Thank You Letter Batch Query window opens.
6. Enter the search parameters.
7. Click Select Specific Receipt(s).

- If you did not enter specific search criteria in the Thank You Letter Batch Query window and only clicked Select Specific Receipt(s), a confirmation message is displayed before the list of receipts is built. Click Yes to proceed. The Select Specific Receipt(s) window

displays a record for every donor for which an auto receipt was previously run, regardless of whether a thank you receipt was printed or not.

8. Select the receipts to be generated, or click Select All to select all of the receipts.
9. Click OK to return to the Thank You Letter Batch Query window.
10. (optional) Add a note of up to 30 characters in the Note field. This information displays on all receipts generated in this batch.
11. Click Print to generate the report and close the Thank You Letter Batch Query window.



Thank You Letter Batch Query window

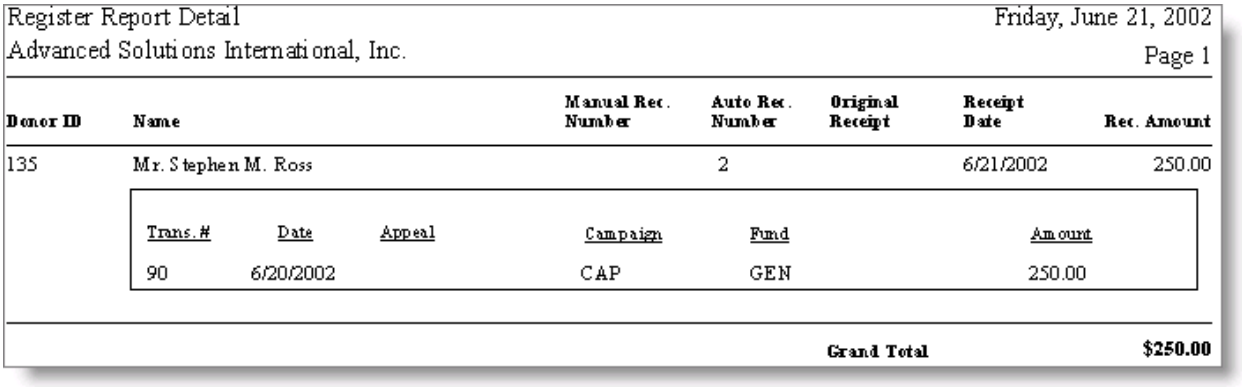
To print a Register Report after auto receipting

1. From Fundraising, select Generate reports to open the Generate reports window.
2. Select Register Report from the list of Report Types.
3. Select one of the register reports from the list of Available Reports.
4. (optional) Click Set Report Destination to change the report destination.

5. Click Run. The Batch Receipt Query window opens.
6. Enter the search parameters.
7. Click Select Specific Receipt(s).

- If you did not enter specific search criteria in the Batch Receipt Query window and only selected Select Specific Receipt(s), a confirmation message displays before the list of receipts is built. Click Yes to proceed. The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a register report was printed or not.

8. Select the receipts to be generated, or click Select All to select all of the receipts.
9. Click OK to return to the Batch Receipt Query window.
10. (optional) Add a note of up to 30 characters in the Note field. This information displays on all receipts generated in this batch.
11. Click Print to generate the report and close the Batch Receipt Query window.



Register Report Detail — Friday, June 21, 2002
Advanced Solutions International, Inc. — Page 1

Donor ID	Name	Manual Rec. Number	Auto Rec. Number	Original Receipt	Receipt Date	Rec. Amount
135	Mr. Stephen M. Ross		2		6/21/2002	250.00

Trans.#	Date	Appeal	Campaign	Fund	Amount
90	6/20/2002		CAP	GEN	250.00

Grand Total $250.00

Sample Register Report

Generating Receipts Using Special Search Criteria

You can conduct specific searches using a wide range of options when generating donation receipts and receipt reports. For example, you can narrow your search to a specific appeal, campaign, or fund, or you can specify a date or amount range. In addition, you can conduct ad hoc searches on the Name table, the Name_FR table, or both.

To generate receipts using a date and amount range

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt from the list of Report Types.
3. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
4. Click Run. The Auto Receipt Batch Query window opens.
5. Enter the Campaign.
6. Enter the Fund.
7. Enter an amount range in the Payment Amt and to fields.
8. Enter a date range in the Payment Date and to fields.
9. Click Select Specific Gift(s) and select records for which receipts will be issued.
10. Click OK to return to the Auto Receipt Batch Query window.
11. Click Print to run the report.

To generate receipts using an ad hoc search

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Receipt from the list of Report Types.
3. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
4. Click Run. The Auto Receipt Batch Query window opens.
5. Click Member Ad Hoc Search. The Select Search Instructions window opens.
6. Click New. The Search Instructions window opens.
7. Enter the name of the search in the Search Name field.
8. Select a Mode.
9. Select a Comparison File from the drop-down list.
10. Select a Comparison Field from the drop-down list.
11. Select a comparison operator from the list of comparison options.

12. Enter the desired value in the Comparison Value data entry area.
13. Click Save to save the search instructions and return to the Select Search Instructions window.
14. Click OK to return to the Auto Receipt Batch Query window. The search parameters display to the right of the Member Ad Hoc Search button.
15. Click Select Specific Gift(s). The Select Specific Gift(s) window opens.
16. Select the receipt to be generated, or click Select All to select all of the receipts.
17. Click OK.
18. Click Print to generate the report.

Generating Replacement Receipts

You can generate replacement receipts with the receipting function. Replacement receipts are issued to replace previously issued receipts. To provide an audit trail, the original receipt number is canceled and a new replacement receipt number is issued. Only receipts that have not been canceled can be selected to print replacements. When the receipt is selected, the original receipt number is canceled and the next available auto-generated receipt number is assigned.

> **Note:** Note: When printing replacement receipts, if you do not enter information in the Note field on the Replacement Receipt Batch Query window, the receipt prints the note from the original receipt. For example, if the original note was January 99 receipts and a replacement receipt is issued in July, the note on the receipt will still read January 99 receipts if you do not enter a new note in the Note field. If a new entry is made in the Note field, this entry overrides the original note text.

To generate replacement receipts

1. From Fundraising, select Generate reports to display the Generate reports window.
2. Select Replacement Receipt from the list of Report Types.
3. Select Sample Replacement Receipt (Crystal) from the list of Available Reports.

4. (optional) Click Set Report Destination to change the report destination.
5. Click Run. The Replacement Receipt Batch Query window opens. This window is similar to the Auto Receipt Batch Query window in that it also allows you to specify search criteria to generate receipts.
6. (optional) Enter the search criteria.
7. Click Select Specific Receipt(s) to display the Select Specific Receipts window.

- If you did not enter selection criteria on the Replacement Receipt Batch Query window and only clicked Select Specific Receipt(s), a confirmation message displays before the list of receipts is built. Click Yes to proceed. The Select Specific Receipt(s) window displays a record for every donor for which an auto receipt was previously run, regardless of whether a register report was printed or not.

8. Select the receipts for which to generate replacements, or click Select All to select all of the receipts.
9. Click OK to return to the Replacement Receipt Batch Query window.
10. Click Print to generate the replacement receipts. You are prompted to change the printer settings if necessary.

- To change the printer selection, select the destination from File> Report Destination.

11. Click OK.

- A message is printed on the receipt indicating that it is a replacement receipt. The original receipt number is also printed on the receipt. The Receipt Validation window opens after the receipt prints.

12. Click OK. A message displays asking if you want to print a thank you letter for this receipt.
13. Click Yes to print the letter, or No to skip printing the letter. After you print the thank you letter or click No, a second message displays asking if you want to print a register report for this receipt.
14. Click Yes to print the register report, or No to skip printing the register report.

Generating Aggregate Receipts

The receipting feature allows you to generate aggregate receipts. An aggregate receipt can be a single receipt for multiple payments or for one payment split among multiple funds.

An aggregate receipt prints under the following conditions:

- A donor made multiple payments to one fund (one registration number)
- A donor made one payment distributed to multiple funds that meet the specified selection criteria, but the funds have the same registration number
- A donor made a payment to a fund that does not have a registration number (receipts for payments to funds without registration numbers are aggregate receipts by default)

To generate an aggregate receipt

1. From Fundraising, select Enter and edit gifts to display the Overview tab on the Enter and edit gifts window.
2. Enter a gift. See To enter a single gift or single pledge for information on entering a single gift.
3. Click New and enter a second gift using the same donor ID, but to a different fund, and click Save.
4. From Fundraising, select Generate reports to display the Generate reports window.
5. Select Receipt from the list of Report Types.
6. Select Sample Auto Receipt (Crystal) from the list of Available Reports.
7. Click Run to display the Auto Receipt Batch Query window.
8. Click Select Specific Gift(s) to display the Select Specific Gifts window. Select the two gifts you just entered.
9. Click OK to return to the Auto Receipt Batch Query window.
10. Click Print.
11. Click OK when the system prompts you to change printers.

- In this example, a single receipt was issued for both gifts. The gift amount of $500 displays in the Gift Amt. field in the Receipt Validation window. This is the total of the two gifts. Yes displays in the Receipt Validation window to indicate that this is an aggregate receipt. Because this is an aggregate receipt, only one receipt number displays.

12. Click OK. A message displays asking if you want to print a thank you letter for this receipt.
13. Click Yes to print the letter, or No to skip printing the letter. After you print the thank you letter or click No, a second message displays asking if you want to print a register report for this receipt.
14. Click Yes to print the register report, or No to skip printing the register report.

Manual Receipting

Although the Fundraising module provides a robust auto-receipting feature, you can use the user-generated manual receipting function when necessary. Because manual receipting and auto receipting are mutually exclusive, if you enter a manual receipt for a gift, a receipt is not auto-generated for the gift. Manual receipts are never printed; they are stored with the gift. Manual receipt numbers cannot be entered for single pledges or installment pledges. If you select a Gift Type of Single Pledge or Installment, the Receipt Number field and the Do not Print Receipt option are disabled on the Enter and edit gifts window.

To issue manual receipts

1. From Fundraising, select Enter and edit gifts to display the Overview tab on the Enter and edit gifts window.
2. Enter a gift.
3. Enter a manual receipt number in the Receipt Number field.
4. Click Save.

> **Note:** Note: When you enter a receipt number, the Do not Print Receipt option is automatically selected and cannot be cleared. You cannot edit a gift associated with a manual receipt after the gift has been saved.

Sample Fundraising Reports

Fundraising reports are used to generate detail and summary reports on many aspects of fundraising.

Donor Club Summary as of July 23rd, 2002

Page 1

Sorted by Date

Advanced Solutions International, Inc.

Date	Donor Clubs Awarded	Donor Clubs	Donor Club Title
08/29/2000	1	BRICK	Brick Donor Club
07/15/2002	2	AMBASSADOR	Ambassador Donor Club
Total Donor Clubs Awarded	3	Awards listed	

Admin Console: Continuum > Fundraising reports > Reports, select report from Available Reports

Desktop: Fundraising > Generate reports > Reports, select a report from the Available Reports

Appeal Activity Report (Crystal)

The Appeal Activity Report is a detailed listing of all of the Donation (Gifts and Pledges) Activities, listed by Appeal for a given period of time. Run this report from:

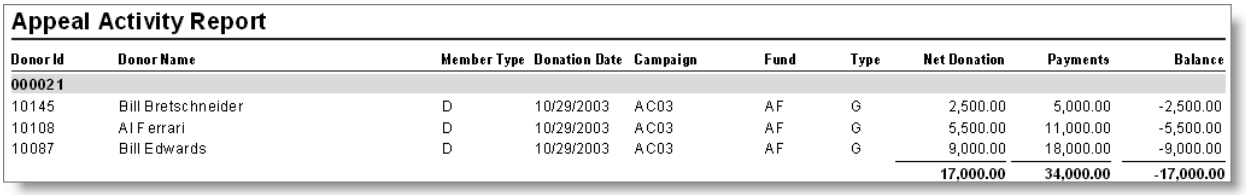
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity

Desktop: Fundraising > Generate Reports > Activity

Notes

- Donations include Gifts and Pledges, including unpaid pledges.
- The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.
- In this report, Donations include Fundraising, Events, and Dues donations.

- Split donations will be displayed on two or more shaded lines.
- If the donor is a company, company name is displayed. If the donor is a person, Full Name is displayed.



Appeal Activity Report

Donor Id	Donor Name	Member Type	Donation Date	Campaign	Fund	Type	Net Donation	Payments	Balance
000021									
10145	Bill Bretschneider	D	10/29/2003	AC03	AF	G	2,500.00	5,000.00	-2,500.00
10108	Al Ferrari	D	10/29/2003	AC03	AF	G	5,500.00	11,000.00	-5,500.00
10087	Bill Edwards	D	10/29/2003	AC03	AF	G	9,000.00	18,000.00	-9,000.00
							17,000.00	**34,000.00**	**-17,000.00**

Appeal Activity Report

101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	AC01	AF	G	200.00	800.00	-600.00
101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	AC01	CAP	G	300.00	1,200.00	-900.00

Split donations are shown on consecutive shaded lines

Appeal Performance Analysis (Crystal)

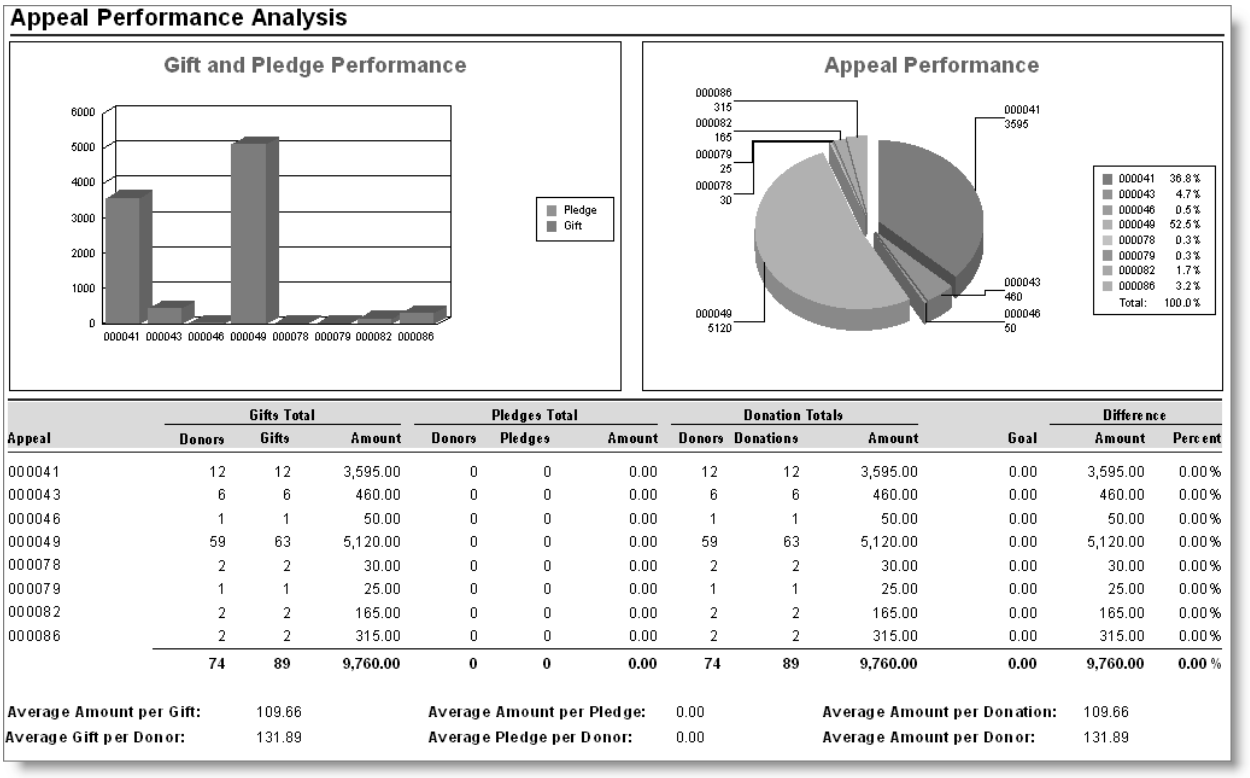
The Appeal Performance Analysis is a comprehensive summary of appeal results and statistics. The report provides a snapshot of each appeal. It lists the total number and total amount of gifts, pledges, and donations; the number of donors; the appeal goal and the amount and percentage difference between the goal and the actual proceeds. Run this report from:

Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Analysis or Fundraising > Executive Window

Note: Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Appeal	Gifts Total Donors	Gifts	Amount	Pledges Total Donors	Pledges	Amount	Donation Totals Donors	Donations	Amount	Goal	Difference Amount	Percent
000041	12	12	3,595.00	0	0	0.00	12	12	3,595.00	0.00	3,595.00	0.00%
000043	6	6	460.00	0	0	0.00	6	6	460.00	0.00	460.00	0.00%
000046	1	1	50.00	0	0	0.00	1	1	50.00	0.00	50.00	0.00%
000049	59	63	5,120.00	0	0	0.00	59	63	5,120.00	0.00	5,120.00	0.00%
000078	2	2	30.00	0	0	0.00	2	2	30.00	0.00	30.00	0.00%
000079	1	1	25.00	0	0	0.00	1	1	25.00	0.00	25.00	0.00%
000082	2	2	165.00	0	0	0.00	2	2	165.00	0.00	165.00	0.00%
000086	2	2	315.00	0	0	0.00	2	2	315.00	0.00	315.00	0.00%
	74	**89**	**9,760.00**	**0**	**0**	**0.00**	**74**	**89**	**9,760.00**	**0.00**	**9,760.00**	**0.00%**

Average Amount per Gift:	109.66	**Average Amount per Pledge:**	0.00	**Average Amount per Donation:**	109.66
Average Gift per Donor:	131.89	**Average Pledge per Donor:**	0.00	**Average Amount per Donor:**	131.89

Appeal Performance Analysis report

Appeal Expense report

You can enter these search criteria when printing an Appeal Expense report (Fundraising > Generate reports > Reports > Appeal Expense):

- Appeal code
- Campaign code
- Fund code
- Date range
- Amount range

The system searches for the expense items with exact match on Appeal, Campaign, or Fund if any of these fields are populated.

Date searches

Date searches work with these conditions:

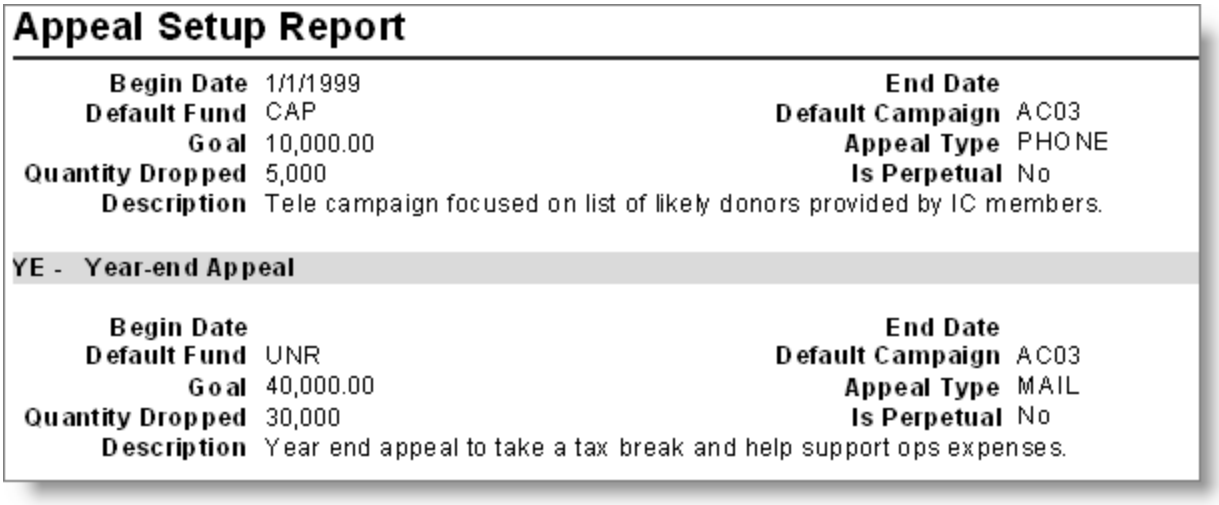
- If only the minimum date is populated, the system searches for any expense items that are equal to or greater than the minimum date.
- If only maximum date is populated, the system searches for any expense items that are equal to or less than the maximum date.
- If both minimum and maximum date are populated, the system finds the expense items that are greater than or equal to minimum date but less than or equal to maximum date.

The rules applied to the amount range are the same as for the date range.

Appeal Setup Report (Crystal)

The Appeal Setup Report lists each Fundraising Appeal and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup
Desktop: Fundraising > Generate Reports > Setup



Appeal Setup Report

Begin Date	1/1/1999	**End Date**	
Default Fund	CAP	**Default Campaign**	AC03
Goal	10,000.00	**Appeal Type**	PHONE
Quantity Dropped	5,000	**Is Perpetual**	No
Description	Tele campaign focused on list of likely donors provided by IC members.		

YE - Year-end Appeal

Begin Date		**End Date**	
Default Fund	UNR	**Default Campaign**	AC03
Goal	40,000.00	**Appeal Type**	MAIL
Quantity Dropped	30,000	**Is Perpetual**	No
Description	Year end appeal to take a tax break and help support ops expenses.		

Appeal Setup Report

Campaign Activity Report (Crystal)

The Campaign Activity Report is a detailed listing of all of the Donation (Gifts and Pledges) Activities listed by Campaign for a given period of time. The report lists campaign, donor, appeal, and payment related information. Run this report from:

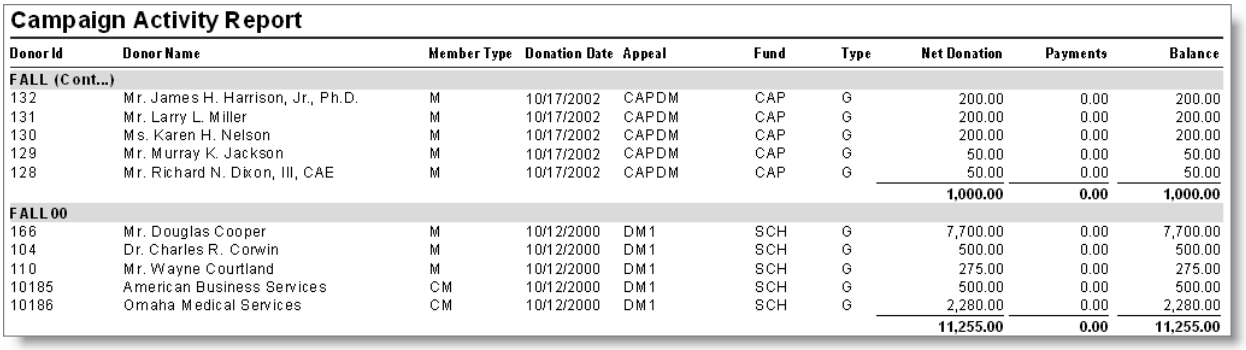
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity
Desktop: Fundraising > Generate Reports > Activity

Note: Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Note: Donations include Gifts and Pledges, including unpaid pledges.

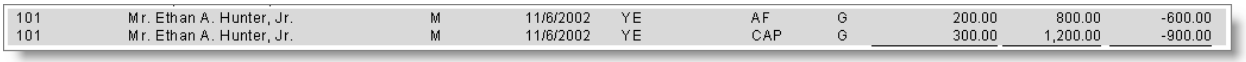
Note: Split donations will be displayed on two or more shaded lines.



Campaign Activity Report

Donor Id	Donor Name	Member Type	Donation Date	Appeal	Fund	Type	Net Donation	Payments	Balance
FALL (Cont...)									
132	Mr. James H. Harrison, Jr., Ph.D.	M	10/17/2002	CAPDM	CAP	G	200.00	0.00	200.00
131	Mr. Larry L. Miller	M	10/17/2002	CAPDM	CAP	G	200.00	0.00	200.00
130	Ms. Karen H. Nelson	M	10/17/2002	CAPDM	CAP	G	200.00	0.00	200.00
129	Mr. Murray K. Jackson	M	10/17/2002	CAPDM	CAP	G	50.00	0.00	50.00
128	Mr. Richard N. Dixon, III, CAE	M	10/17/2002	CAPDM	CAP	G	50.00	0.00	50.00
							1,000.00	**0.00**	**1,000.00**
FALL00									
166	Mr. Douglas Cooper	M	10/12/2000	DM1	SCH	G	7,700.00	0.00	7,700.00
104	Dr. Charles R. Corwin	M	10/12/2000	DM1	SCH	G	500.00	0.00	500.00
110	Mr. Wayne Courtland	M	10/12/2000	DM1	SCH	G	275.00	0.00	275.00
10185	American Business Services	CM	10/12/2000	DM1	SCH	G	500.00	0.00	500.00
10186	Omaha Medical Services	CM	10/12/2000	DM1	SCH	G	2,280.00	0.00	2,280.00
							11,255.00	**0.00**	**11,255.00**

Campaign Activity Report



101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	YE	AF	G	200.00	800.00	-600.00
101	Mr. Ethan A. Hunter, Jr.	M	11/6/2002	YE	CAP	G	300.00	1,200.00	-900.00

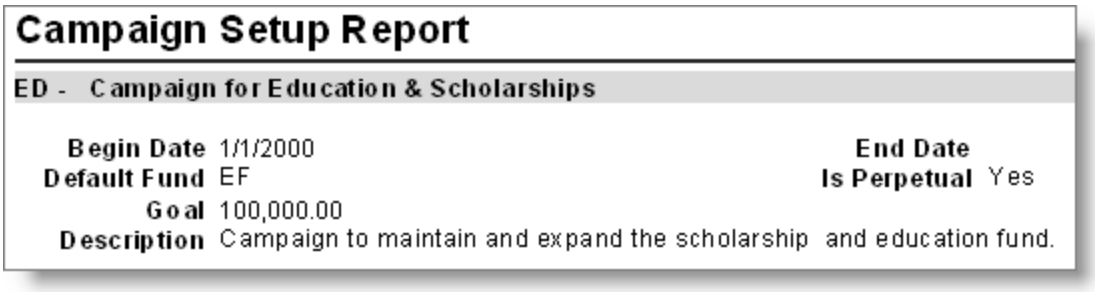
Split donations are displayed on consecutive shaded lines

Campaign Setup Report (Crystal)

The Campaign Setup Report lists each Fundraising Campaign and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup

Desktop: Fundraising > Generate Reports > Setup



Campaign Setup Report

ED - Campaign for Education & Scholarships

Begin Date	1/1/2000	**End Date**	
Default Fund	EF	**Is Perpetual**	Yes
Goal	100,000.00		
Description	Campaign to maintain and expand the scholarship and education fund.		

Campaign Setup Report

Distribution Activity by Campaign (Crystal)

The Distribution Activity by Campaign report lists all Donation (Gift and Pledge) Activities grouped by Campaign, Appeal, Donor ID, Transaction, and Distribution.

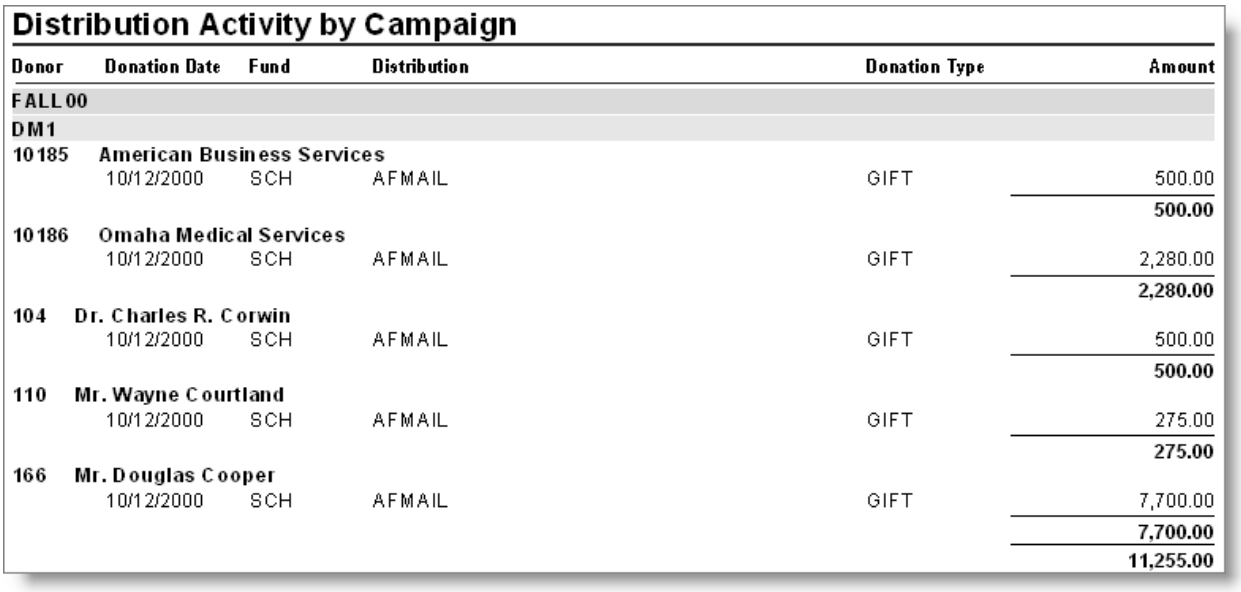
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity

Desktop: Fundraising > Generate Reports > Activity

Note: Note: This report includes Donations from Fundraising only. Events and Subscriptions donations are not included in this report.

Note: Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Distribution Activity by Campaign

Donor	Donation Date	Fund	Distribution	Donation Type	Amount
FALL00					
DM1					
10185	**American Business Services**				
	10/12/2000	SCH	AFMAIL	GIFT	500.00
					500.00
10186	**Omaha Medical Services**				
	10/12/2000	SCH	AFMAIL	GIFT	2,280.00
					2,280.00
104	**Dr. Charles R. Corwin**				
	10/12/2000	SCH	AFMAIL	GIFT	500.00
					500.00
110	**Mr. Wayne Courtland**				
	10/12/2000	SCH	AFMAIL	GIFT	275.00
					275.00
166	**Mr. Douglas Cooper**				
	10/12/2000	SCH	AFMAIL	GIFT	7,700.00
					7,700.00
					11,255.00

Distribution Activity by Campaign

Distribution Activity Report (Crystal)

The Distribution Activity Report lists all Donation (Gift and Pledge) Activities grouped by Distribution, Donor ID, and Original Transaction. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity

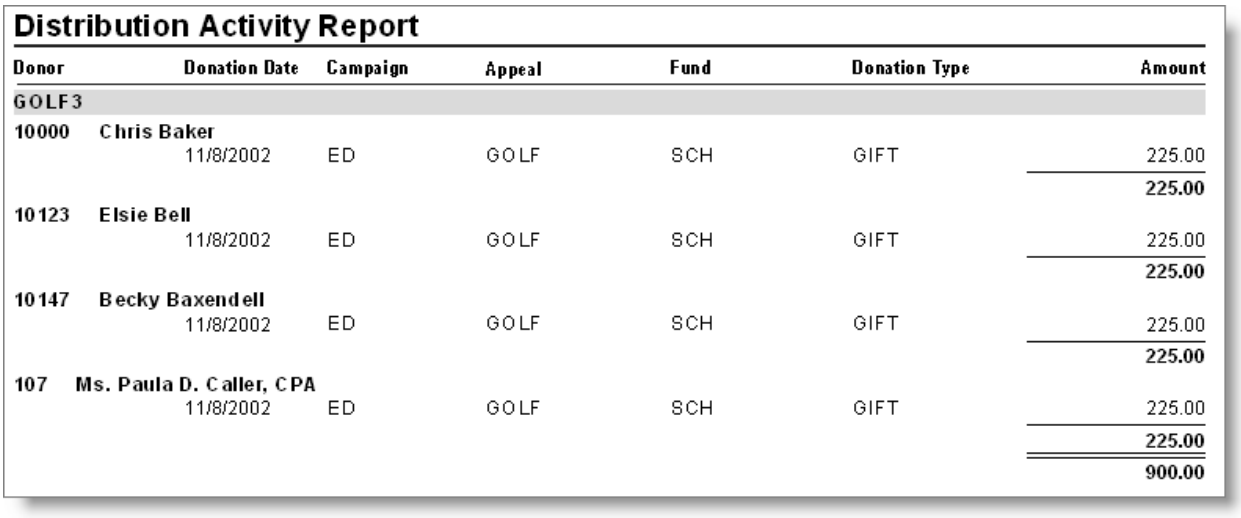
Desktop: Fundraising > Generate Reports > Activity

Note: Note:

Note: This report includes Donations from Fundraising only. Events and Subscriptions donations are not included in this report.

Note: Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Distribution Activity Report

Donor	Donation Date	Campaign	Appeal	Fund	Donation Type	Amount
GOLF3						
10000 Chris Baker						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
10123 Elsie Bell						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
10147 Becky Baxendell						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
107 Ms. Paula D. Caller, CPA						
	11/8/2002	ED	GOLF	SCH	GIFT	225.00
						225.00
						900.00

Distribution Activity Report

Distribution Performance Analysis (Crystal)

The Distribution Performance Analysis report provides a summary of the sources for each distribution category. The report aggregates the number and amount of gifts,

pledges, and donations; the number of donors; and the percentage each distribution category makes up of the sum of all distribution donations. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Desktop: Fundraising > Generate Reports > Analysis

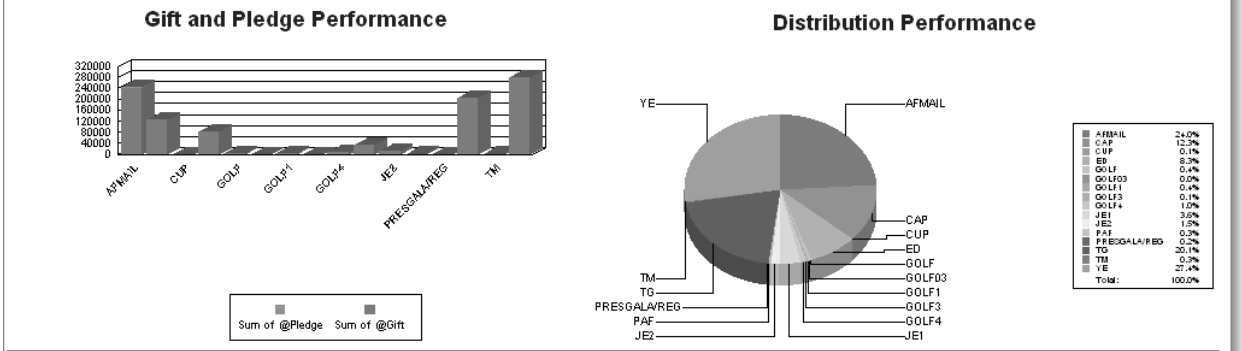
Note: Note:

Note: This report includes Donations from Fundraising only. Events and Subscriptions donations are not included in this report.

Note: Donations include Gifts and Pledges, including unpaid pledges.

Note: Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.

Distribution Performance Analysis



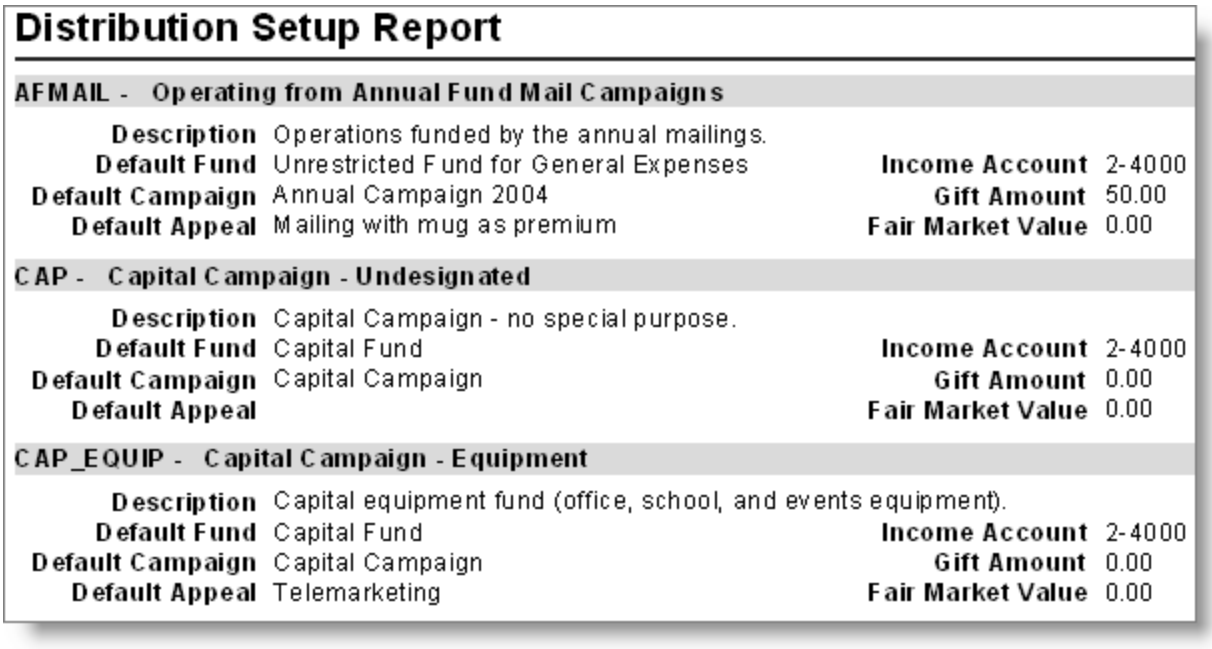
Distribution	Gifts Total			Pledges Total			Donation Totals			
	Donors	Gifts	Amount	Donors	Pledges	Amount	Donors	Donations	Amount	% of Total
AFMAIL	122	172	243,517.00	2	3	1,900.00	123	175	245,417.00	24.01 %
CAP	14	15	126,227.00	0	0	0.00	14	15	126,227.00	12.35 %
CUP	2	2	858.00	0	0	0.00	2	2	858.00	0.08 %
ED	5	6	84,400.00	0	0	0.00	5	6	84,400.00	8.26 %
GOLF	19	19	4,575.00	0	0	0.00	19	19	4,575.00	0.45 %
GOLF03	4	4	360.00	0	0	0.00	4	4	360.00	0.04 %
GOLF1	17	17	4,265.00	0	0	0.00	17	17	4,265.00	0.42 %
GOLF3	4	4	900.00	0	0	0.00	4	4	900.00	0.09 %
GOLF4	110	110	10,200.00	0	0	0.00	110	110	10,200.00	1.00 %
JE1	9	9	36,300.00	0	0	0.00	9	9	36,300.00	3.55 %
JE2	9	9	15,000.00	0	0	0.00	9	9	15,000.00	1.47 %
PAF	3	17	470.00	2	2	2,650.00	4	19	3,120.00	0.31 %
PRESGALA/REG	4	4	2,000.00	0	0	0.00	4	4	2,000.00	0.20 %
TG	5	5	205,000.00	0	0	0.00	5	5	205,000.00	20.06 %
TM	6	7	2,740.00	1	1	600.00	7	8	3,340.00	0.33 %
YE	39	65	280,190.00	0	0	0.00	39	65	280,190.00	27.41 %
	259	**464**	**1,017,002.00**	**4**	**6**	**5,150.00**	**259**	**470**	**1,022,152.00**	**100.00 %**

Distribution Performance Analysis

Distribution Setup Report (Crystal)

The Distribution Setup Report lists each Fundraising Distribution and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup
Desktop: Fundraising > Generate Reports > Setup



Distribution Setup Report

AFMAIL - Operating from Annual Fund Mail Campaigns

Description	Operations funded by the annual mailings.		
Default Fund	Unrestricted Fund for General Expenses	**Income Account**	2-4000
Default Campaign	Annual Campaign 2004	**Gift Amount**	50.00
Default Appeal	Mailing with mug as premium	**Fair Market Value**	0.00

CAP - Capital Campaign - Undesignated

Description	Capital Campaign - no special purpose.		
Default Fund	Capital Fund	**Income Account**	2-4000
Default Campaign	Capital Campaign	**Gift Amount**	0.00
Default Appeal		**Fair Market Value**	0.00

CAP_EQUIP - Capital Campaign - Equipment

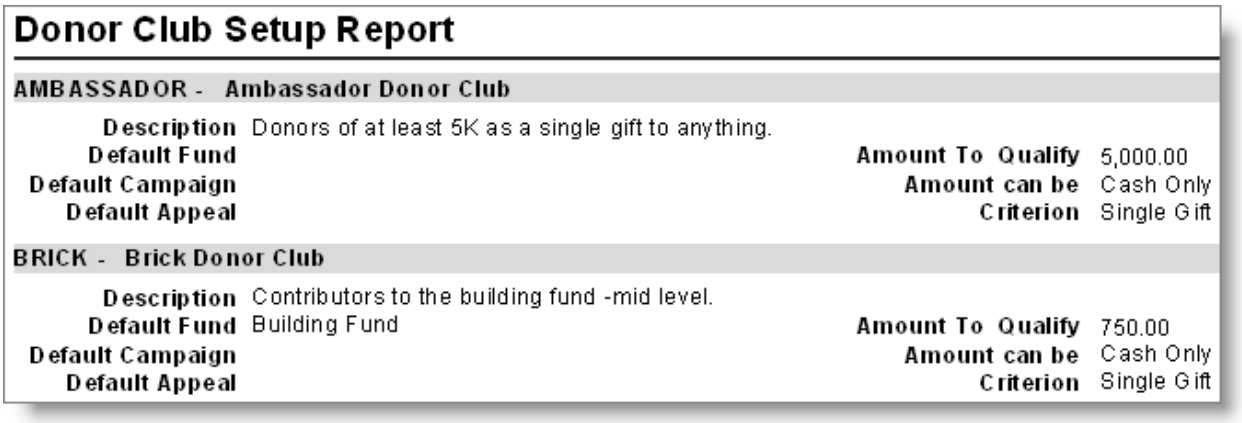
Description	Capital equipment fund (office, school, and events equipment).		
Default Fund	Capital Fund	**Income Account**	2-4000
Default Campaign	Capital Campaign	**Gift Amount**	0.00
Default Appeal	Telemarketing	**Fair Market Value**	0.00

Distribution Setup Report

Donor Club Setup Report (Crystal)

The Donor Club Setup Report lists each Fundraising Donor Club and its current configuration in iMIS. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup
Desktop: Fundraising > Generate Reports > Setup



Donor Club Setup Report

AMBASSADOR - Ambassador Donor Club

Description	Donors of at least 5K as a single gift to anything.		
Default Fund		**Amount To Qualify**	5,000.00
Default Campaign		**Amount can be**	Cash Only
Default Appeal		**Criterion**	Single Gift

BRICK - Brick Donor Club

Description	Contributors to the building fund -mid level.		
Default Fund	Building Fund	**Amount To Qualify**	750.00
Default Campaign		**Amount can be**	Cash Only
Default Appeal		**Criterion**	Single Gift

Donor Club Setup Report

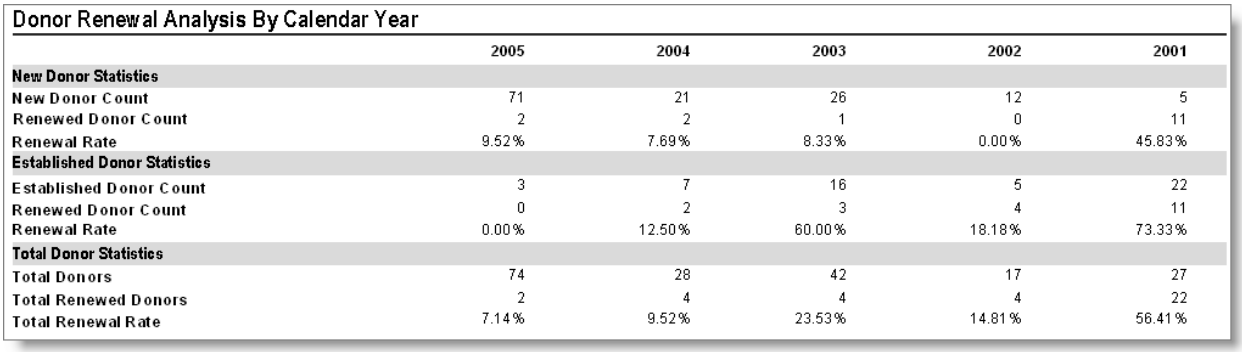
Donor Renewal Analysis by Calendar Year report

The Donor Renewal Analysis by Calendar Year report shows the number of new and established donors, and their renewal rates. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis

Desktop: Fundraising > Analysis

Note: Note: To view this report for a fiscal year, run the Donor Renewal Analysis report.



Donor Renewal Analysis By Calendar Year

	2005	2004	2003	2002	2001
New Donor Statistics					
New Donor Count	71	21	26	12	5
Renewed Donor Count	2	2	1	0	11
Renewal Rate	9.52%	7.69%	8.33%	0.00%	45.83%
Established Donor Statistics					
Established Donor Count	3	7	16	5	22
Renewed Donor Count	0	2	3	4	11
Renewal Rate	0.00%	12.50%	60.00%	18.18%	73.33%
Total Donor Statistics					
Total Donors	74	28	42	17	27
Total Renewed Donors	2	4	4	4	22
Total Renewal Rate	7.14%	9.52%	23.53%	14.81%	56.41%

Donor Renewal Analysis by Calendar Year

Fund Activity Report (Crystal)

The Fund Activity Report lists all Donation (Gifts and Pledges) Activities related to each Fund within a given period of time.

Note: Note: This is a transaction-based report.

Run this report from:

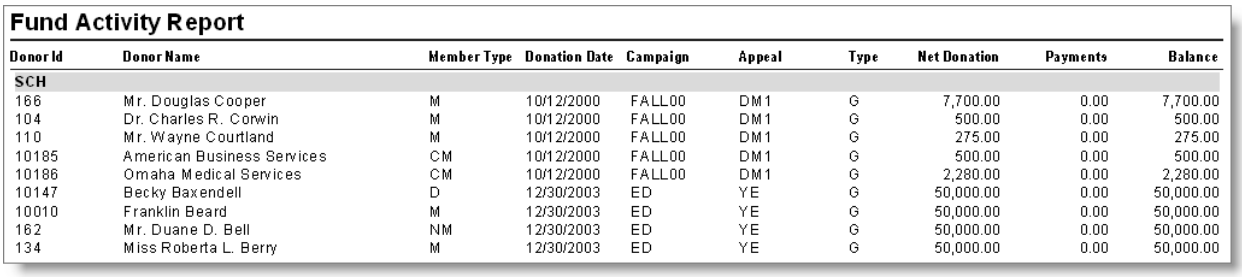
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Activity
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Activity, Fundraising > Executive Window

Note: Note:

Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Donations include Gifts and Pledges, including unpaid pledges.



Fund Activity Report

Donor Id	Donor Name	Member Type	Donation Date	Campaign	Appeal	Type	Net Donation	Payments	Balance
SCH									
166	Mr. Douglas Cooper	M	10/12/2000	FALL00	DM1	G	7,700.00	0.00	7,700.00
104	Dr. Charles R. Corwin	M	10/12/2000	FALL00	DM1	G	500.00	0.00	500.00
110	Mr. Wayne Courtland	M	10/12/2000	FALL00	DM1	G	275.00	0.00	275.00
10185	American Business Services	CM	10/12/2000	FALL00	DM1	G	500.00	0.00	500.00
10186	Omaha Medical Services	CM	10/12/2000	FALL00	DM1	G	2,280.00	0.00	2,280.00
10147	Becky Baxendell	D	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00
10010	Franklin Beard	M	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00
162	Mr. Duane D. Bell	NM	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00
134	Miss Roberta L. Berry	M	12/30/2003	ED	YE	G	50,000.00	0.00	50,000.00

Fund Activity Report

Fund Performance Analysis report (Crystal)

The Fund Performance Analysis report summarizes the Gift, Pledge, and Donation totals for each fund. The report also shows averages for Gifts, Pledges, and Donations by transaction and by donor. Run this report from:

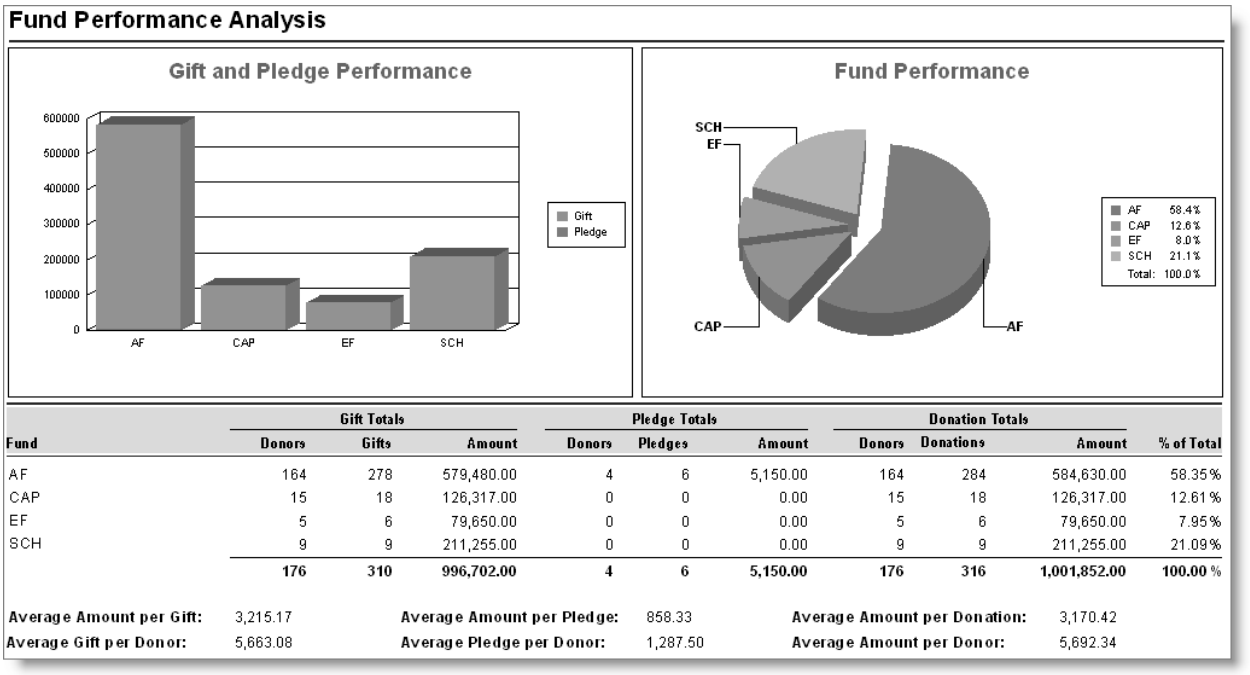
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Desktop: Fundraising > Generate Reports > Analysis

Note: Note:

Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Note: Donations include Gifts and Pledges, including unpaid pledges.



Fund	Gift Totals Donors	Gifts	Amount	Pledge Totals Donors	Pledges	Amount	Donation Totals Donors	Donations	Amount	% of Total
AF	164	278	579,480.00	4	6	5,150.00	164	284	584,630.00	58.35%
CAP	15	18	126,317.00	0	0	0.00	15	18	126,317.00	12.61%
EF	5	6	79,650.00	0	0	0.00	5	6	79,650.00	7.95%
SCH	9	9	211,255.00	0	0	0.00	9	9	211,255.00	21.09%
	176	**310**	**996,702.00**	**4**	**6**	**5,150.00**	**176**	**316**	**1,001,852.00**	**100.00 %**

Average Amount per Gift:	3,215.17	**Average Amount per Pledge:**	858.33	**Average Amount per Donation:**	3,170.42
Average Gift per Donor:	5,663.08	**Average Pledge per Donor:**	1,287.50	**Average Amount per Donor:**	5,692.34

Fund Performance Analysis

Fundraising Reports

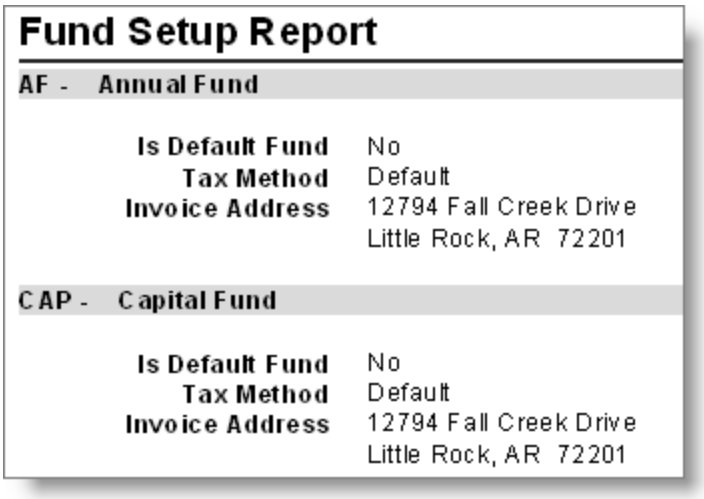
Fund Setup Report (Crystal)

The Fund Setup Report lists each Fundraising Fund and its current configuration in iMIS.

Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Setup

Desktop: Fundraising > Generate Reports > Setup



Fund Setup Report

AF - Annual Fund

Is Default Fund	No
Tax Method	Default
Invoice Address	12794 Fall Creek Drive Little Rock, AR 72201

CAP - Capital Fund

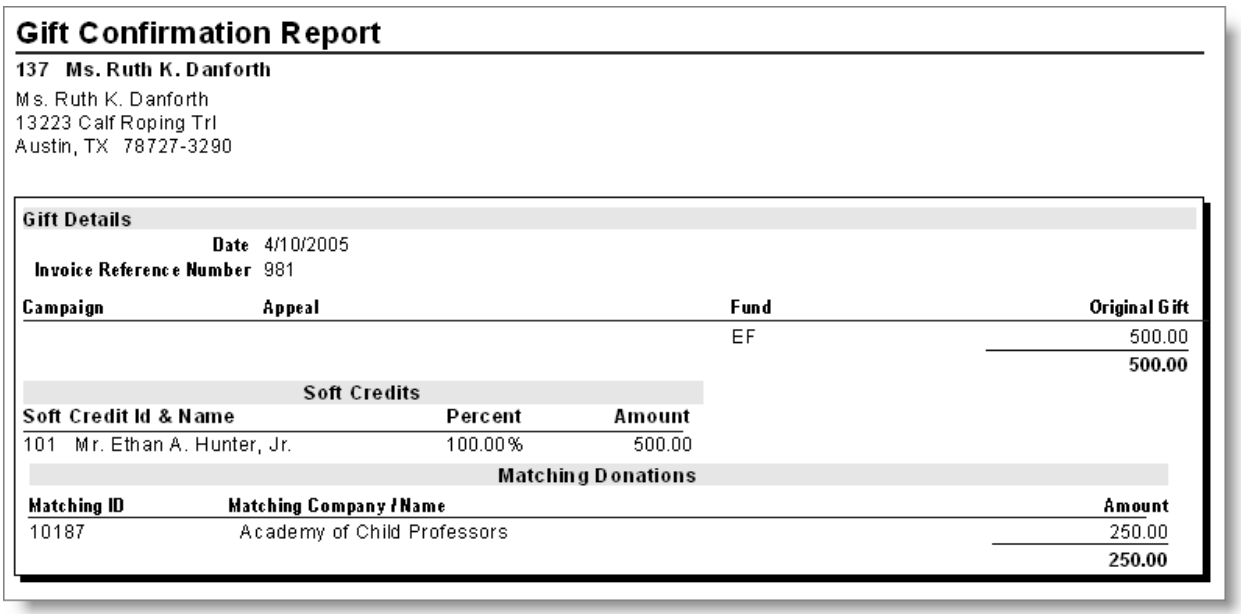
Is Default Fund	No
Tax Method	Default
Invoice Address	12794 Fall Creek Drive Little Rock, AR 72201

Fund Setup Report

Gift Confirmation Report (Crystal)

The Gift Confirmation Report provides details about a donor's gifts including soft credits and matching gifts if there are any. Gifts are listed singly, grouped by donor.

Run this report from: Fundraising > Generate Reports > Reports, Fundraising > Executive Window



Gift Confirmation Report

137 Ms. Ruth K. Danforth

Ms. Ruth K. Danforth
13223 Calf Roping Trl
Austin, TX 78727-3290

Gift Details

Date 4/10/2005
Invoice Reference Number 981

Campaign	Appeal	Fund	Original Gift
		EF	500.00
			500.00

Soft Credits

Soft Credit Id & Name	Percent	Amount
101 Mr. Ethan A. Hunter, Jr.	100.00%	500.00

Matching Donations

Matching ID	Matching Company / Name	Amount
10187	Academy of Child Professors	250.00
		250.00

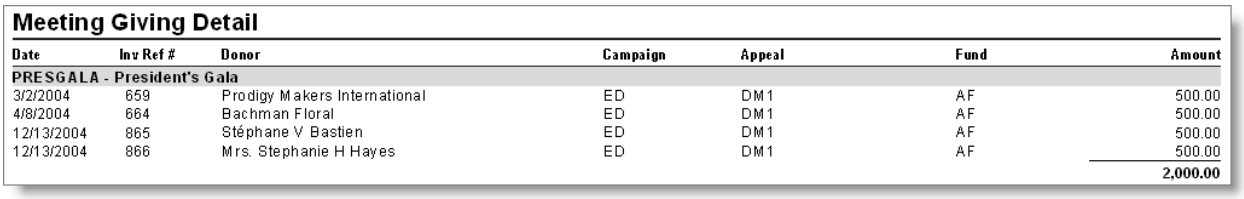
Gift Confirmation Report

Meeting Giving Detail (Crystal)

The Meeting Giving Detail report provides information, grouped by event, about the Fundraising donations made in association with events. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports

Desktop: Fundraising > Generate Reports > Reports



Meeting Giving Detail

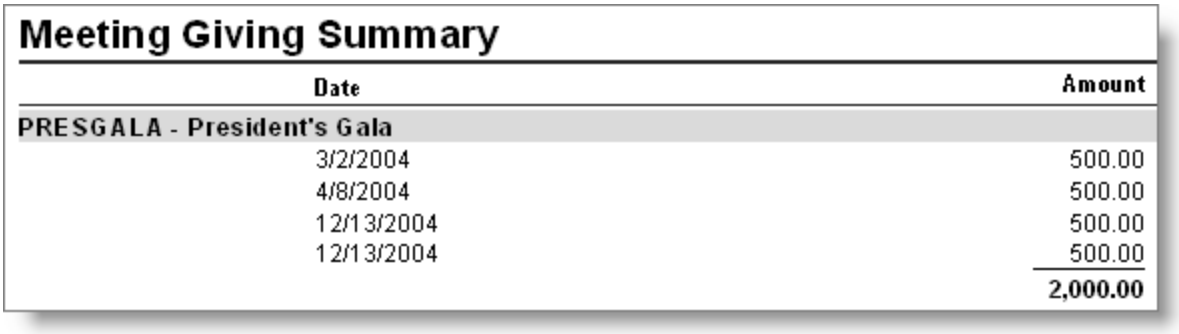
Date	Inv Ref #	Donor	Campaign	Appeal	Fund	Amount
PRESGALA - President's Gala						
3/2/2004	659	Prodigy Makers International	ED	DM1	AF	500.00
4/8/2004	664	Bachman Floral	ED	DM1	AF	500.00
12/13/2004	865	Stéphane V Bastien	ED	DM1	AF	500.00
12/13/2004	866	Mrs. Stephanie H Hayes	ED	DM1	AF	500.00
						2,000.00

Meeting Giving Detail

Meeting Giving Summary (Crystal)

The Meeting Giving Summary report provides the amounts and totals of donations given in association with specific events.

Run this report from: Fundraising > Generate Reports > Reports, Fundraising > Executive Window



Meeting Giving Summary

Date	Amount
PRESGALA - President's Gala	
3/2/2004	500.00
4/8/2004	500.00
12/13/2004	500.00
12/13/2004	500.00
	2,000.00

Meeting Giving Summary

Monthly Donations Summary by Fiscal Period Report (Crystal)

The Monthly Donations Summary by Fiscal Period Report lists all Gifts, Pledges, and Total Donations for each Fiscal month in a Fiscal year. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports

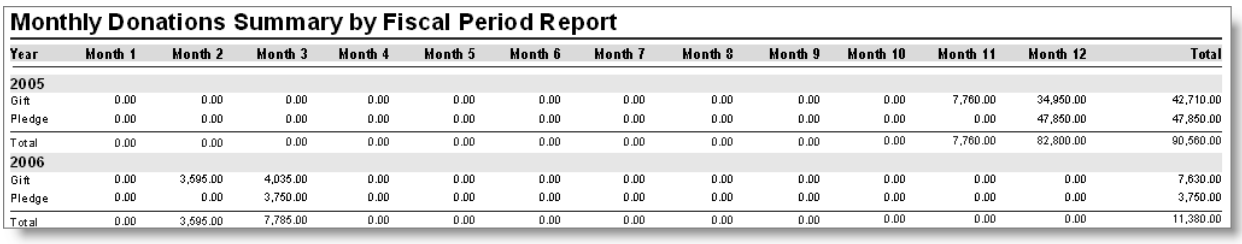
Desktop: Fundraising > Generate Reports > Reports

Note: Note:

Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: Donations include Gifts and Pledges, including unpaid pledges.

Neither Gifts nor Pledges amounts are adjusted by Debit or Credit memos.



Monthly Donations Summary by Fiscal Period Report

Year	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Total
2005													
Gift	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,760.00	34,950.00	42,710.00
Pledge	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47,850.00	47,850.00
Total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,760.00	82,800.00	90,560.00
2006													
Gift	0.00	3,595.00	4,035.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7,630.00
Pledge	0.00	0.00	3,750.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,750.00
Total	0.00	3,595.00	7,785.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11,380.00

Monthly Donations Summary by Fiscal Period Report

Monthly Donations Summary Report (Crystal)

The Monthly Donations Summary Report lists all Gifts, Pledges, and total donation amounts for each month in the calendar year. Run this report from:

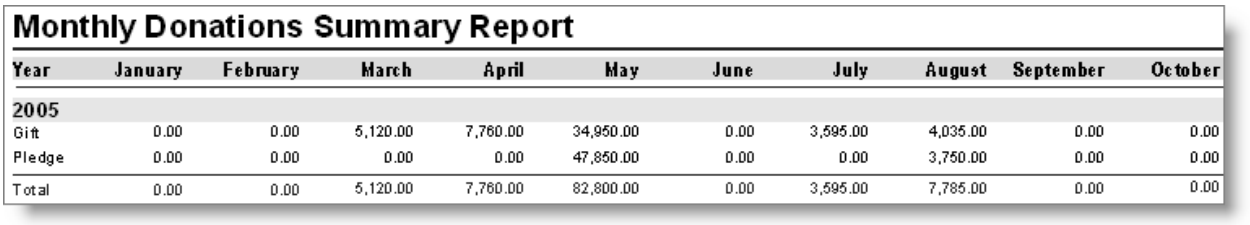
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Note:

Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: Donations include Gifts and Pledges, including unpaid pledges.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.



Monthly Donations Summary Report

Year	January	February	March	April	May	June	July	August	September	October
2005										
Gift	0.00	0.00	5,120.00	7,760.00	34,950.00	0.00	3,595.00	4,035.00	0.00	0.00
Pledge	0.00	0.00	0.00	0.00	47,850.00	0.00	0.00	3,750.00	0.00	0.00
Total	0.00	0.00	5,120.00	7,760.00	82,800.00	0.00	3,595.00	7,785.00	0.00	0.00

Monthly Donations Summary Report

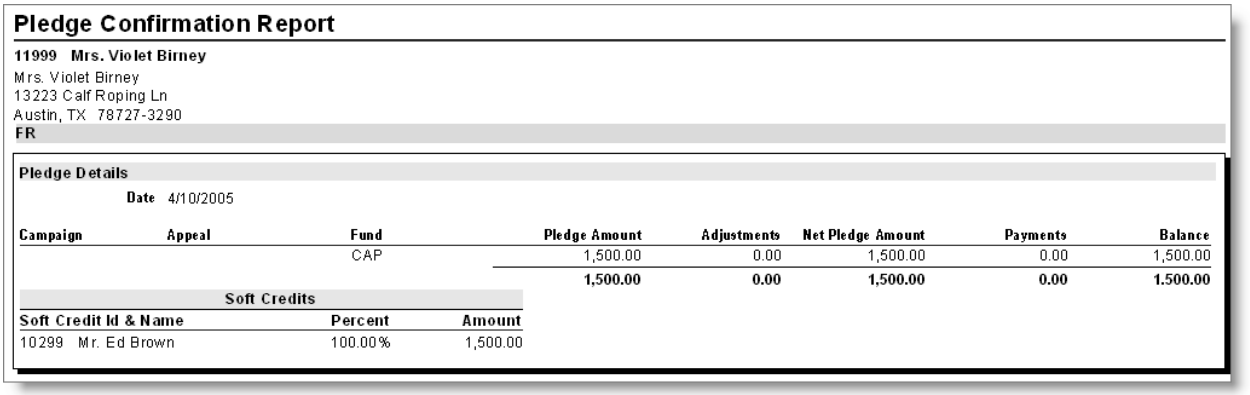
Pledge Confirmation Report (Crystal)

The Pledge Confirmation Report provides details about a donor's pledges, including soft credits if there are any. Pledges are listed singly, grouped by donor. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Note:

This report includes Donations from Fundraising and Events only. Subscriptions donations are not included in this report.



Pledge Confirmation Report

11999 Mrs. Violet Birney
Mrs. Violet Birney
13223 Calf Roping Ln
Austin, TX 78727-3290
FR

Pledge Details

Date 4/10/2005

Campaign	Appeal	Fund	Pledge Amount	Adjustments	Net Pledge Amount	Payments	Balance
		CAP	1,500.00	0.00	1,500.00	0.00	1,500.00
			1,500.00	**0.00**	**1,500.00**	**0.00**	**1.500.00**

Soft Credits

Soft Credit Id & Name	Percent	Amount
10299 Mr. Ed Brown	100.00%	1,500.00

Pledge Confirmation Report

Pledge Details Report

The Pledge Details Report shows detailed information about pledges. It can be filtered by time period, Campaign, Appeal, or Fund. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Desktop: Fundraising > Reports

Pledge Details Report

Donor List As	Fund	Campaign	Appeal	Solicitor	Pledge	Payment	Adjustment	Balance
11/13/1998								
10049 Dr. Seymour Cassidy								
The Cash Family	AF	AC98	TM	101	100.00	0.00	0.00	100.00
				Totals for 11/13/1998:	**100.00**	**0.00**	**0.00**	**100.00**
1/19/1999								
10176 Theodore Cassidy								
	AF	AC98	TM		50.00	50.00	0.00	0.00
				Totals for 1/19/1999:	**50.00**	**50.00**	**0.00**	**0.00**
3/10/2000								
10176 Theodore Cassidy								
	AF	AC00	DM1		225.00	225.00	0.00	0.00
				Totals for 3/10/2000:	**225.00**	**225.00**	**0.00**	**0.00**
3/16/2001								
166 Mr. Douglas Cooper								
	AF	AC01	DM1		500.00	500.00	0.00	0.00
				Totals for 3/16/2001:	**500.00**	**500.00**	**0.00**	**0.00**
12/31/2001								
166 Mr. Douglas Cooper								
	AF	AC01	TM		500.00	0.00	0.00	500.00
				Totals for 12/31/2001:	**500.00**	**0.00**	**0.00**	**500.00**
2/21/2003								
10000 Chris Baker								
	AF	AC02	TM	101	250.00	0.00	0.00	250.00
				Totals for 2/21/2003:	**250.00**	**0.00**	**0.00**	**250.00**
					1,625.00	**775.00**	**0.00**	**850.00**

Pledge Details Report

Pledge Income Forecast (Crystal)

The Pledge Income Forecast report provides a summary of all pledges, payments on them, remaining balances, past due balances and expected pledge payments for the current year (CY) and for the current year plus 1, 2, 3, and 4 years and beyond (CY+1, CY+2, CY+3, CY+4 and beyond).

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Analysis, Fundraising > Executive Window

Note: Note: This report displays pledges with balances only. It does not display pledges that are paid in full.

Pledge Income Forecast

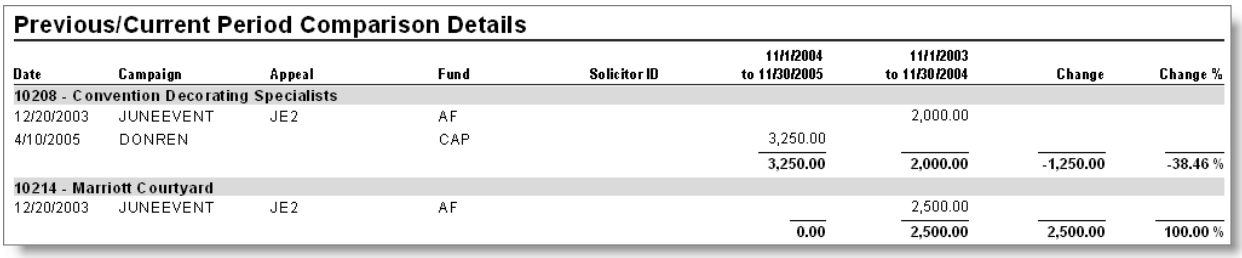
Donor Id	Net Pledge Total	Payments Total	Balance Total	Past Due	Due in 2005	Due in 2006	Due in 2007	Due in 2008	Due in >= 2009
10000	5,250.00	0.00	5,250.00	250.00	1,249.98	1,666.64	1,666.64	416.74	0.00
10049	2,400.00	0.00	2,400.00	2,400.00	0.00	0.00	0.00	0.00	0.00
10176	2,000.00	1,500.00	500.00	0.00	500.00	0.00	0.00	0.00	0.00
166	3,000.00	500.00	2,500.00	500.00	666.64	999.96	333.40	0.00	0.00
	12,650.00	**2,000.00**	**10,650.00**	**3,150.00**	**2,416.62**	**2,666.60**	**2,000.04**	**416.74**	**0.00**

Pledge Income Forecast

Previous/Current Period Comparison Details report

The Previous/Current Period Comparison Details report compares donors' giving between two different time periods. The report can be filtered by Campaign, Appeal, and Fund and can be run for one or for all donors. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window



Previous/Current Period Comparison Details

Date	Campaign	Appeal	Fund	Solicitor ID	11/1/2004 to 11/30/2005	11/1/2003 to 11/30/2004	Change	Change %
10208 - Convention Decorating Specialists								
12/20/2003	JUNEEVENT	JE2	AF			2,000.00		
4/10/2005	DONREN		CAP		3,250.00			
					3,250.00	**2,000.00**	**-1,250.00**	**-38.46 %**
10214 - Marriott Courtyard								
12/20/2003	JUNEEVENT	JE2	AF			2,500.00		
					0.00	**2,500.00**	**2,500.00**	**100.00 %**

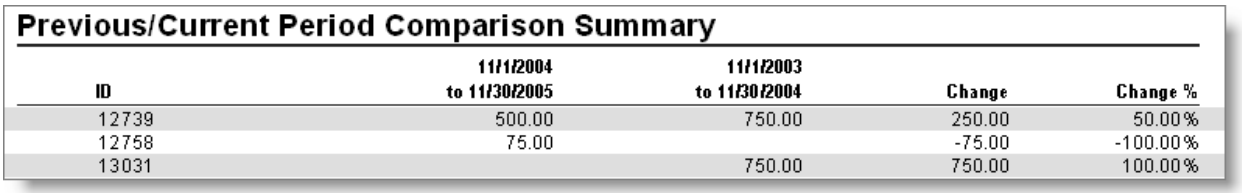
Previous/Current Period Comparison Details

Previous/Current Period Comparison Summary report

The Previous/Current Period Comparison Summary report compares donation amounts by ID between two different periods. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

> **Note:** Note: The report can be filtered by Campaign, Fund, and Appeal, but this information is not listed on the report.



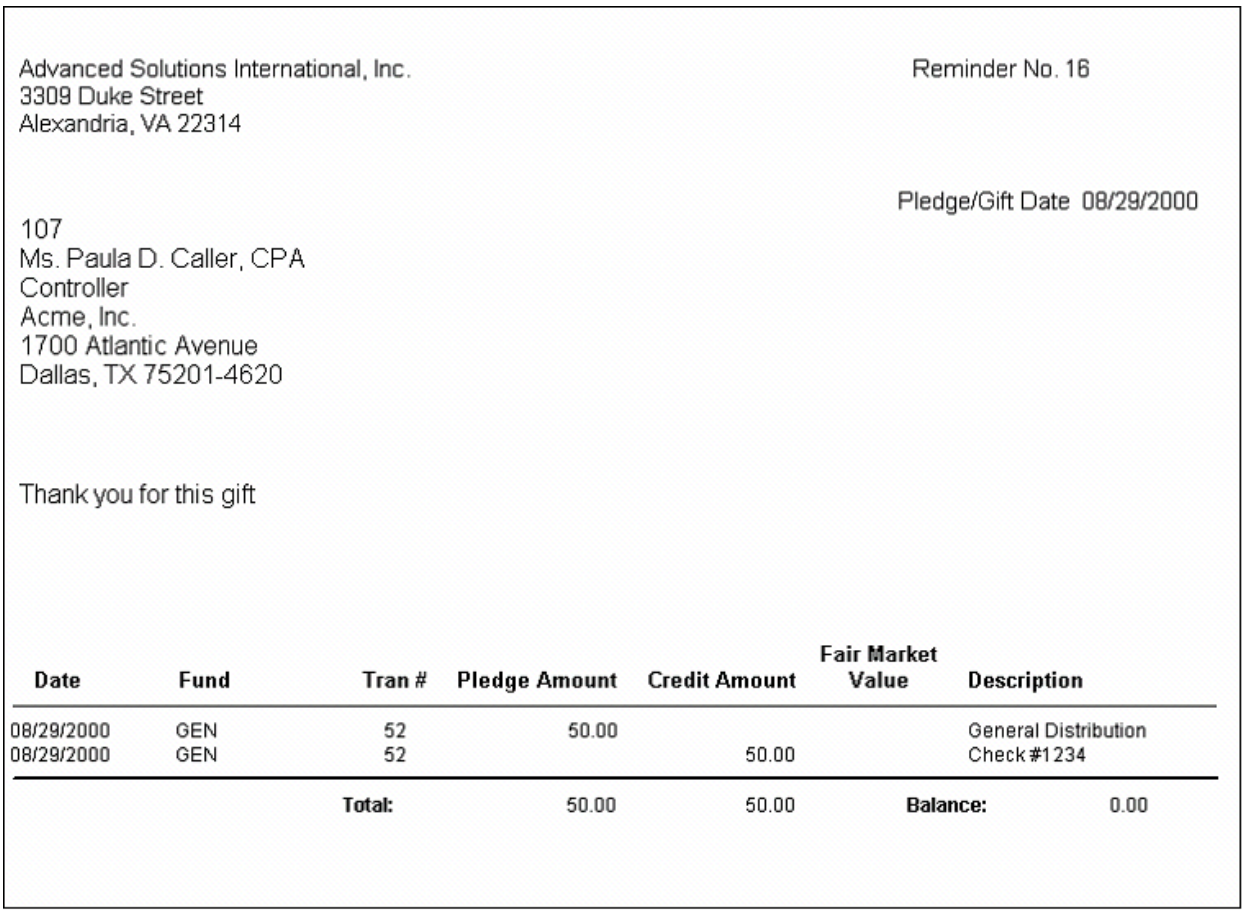
Previous/Current Period Comparison Summary

ID	11/1/2004 to 11/30/2005	11/1/2003 to 11/30/2004	Change	Change %
12739	500.00	750.00	250.00	50.00%
12758	75.00		-75.00	-100.00%
13031		750.00	750.00	100.00%

Previous/Current Period Comparison Summary

Reminder report

Reminder reports are used to issue reminders for gifts received and installments due within a given time period. There are several reminder reports available.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Reminder No. 16

Pledge/Gift Date 08/29/2000

107
Ms. Paula D. Caller, CPA
Controller
Acme, Inc.
1700 Atlantic Avenue
Dallas, TX 75201-4620

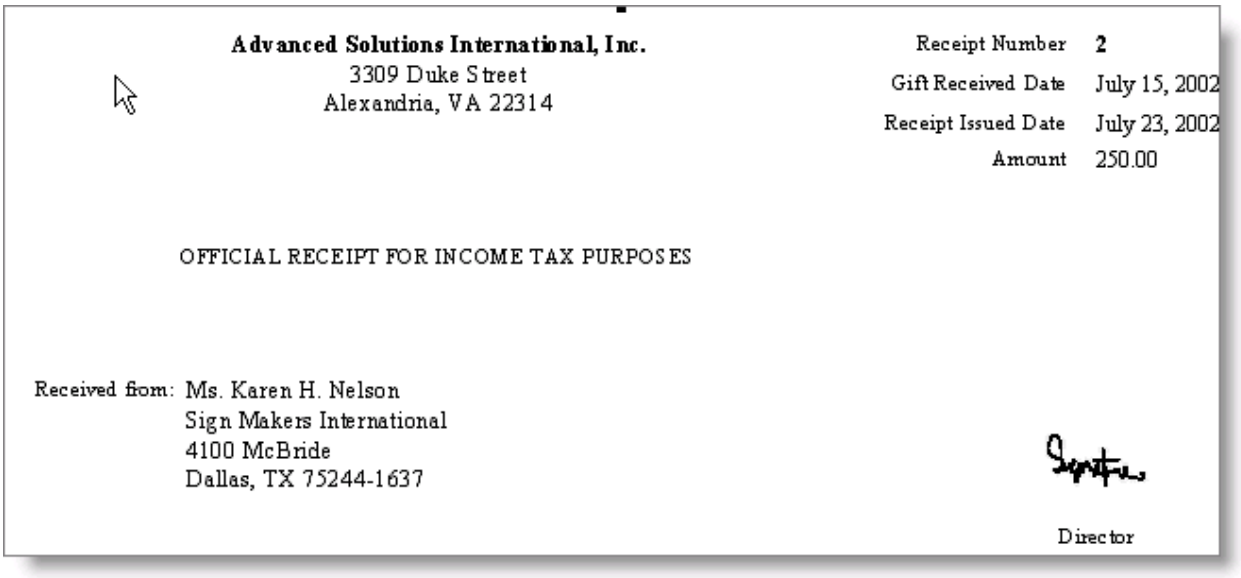
Thank you for this gift

Date	Fund	Tran #	Pledge Amount	Credit Amount	Fair Market Value	Description
08/29/2000	GEN	52	50.00			General Distribution
08/29/2000	GEN	52		50.00		Check #1234
		Total:	50.00	50.00	**Balance:**	0.00

Reminder report

Receipt report

Receipt reports are used to issue receipts for gifts and pledge installments.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Receipt Number 2
Gift Received Date July 15, 2002
Receipt Issued Date July 23, 2002
Amount 250.00

OFFICIAL RECEIPT FOR INCOME TAX PURPOSES

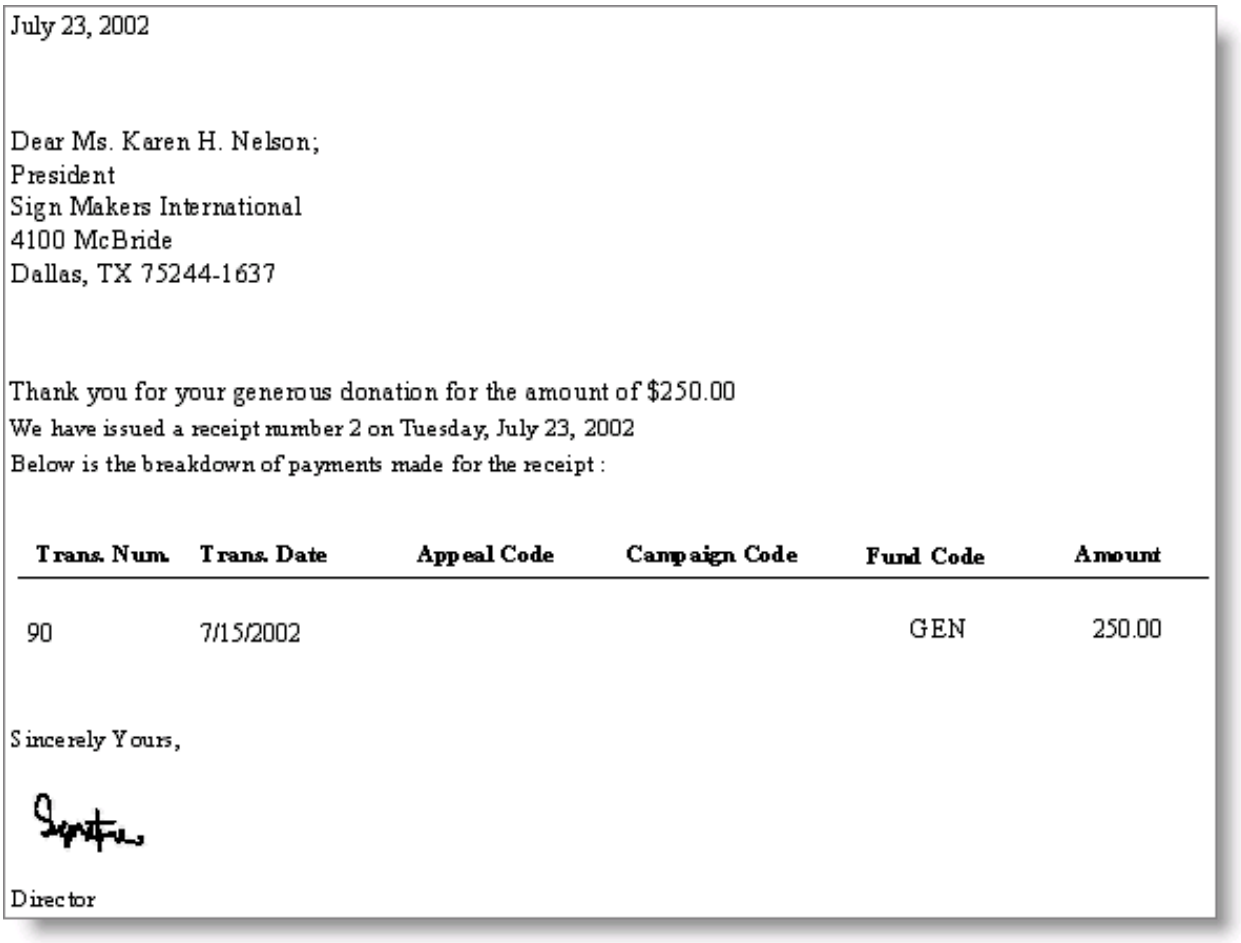
Received from: Ms. Karen H. Nelson
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

Director

Receipt report

Receipt Thank You report

Receipt Thank You reports are used to create thank you letters that include the receipt amount and the breakdown of gifts received.



July 23, 2002

Dear Ms. Karen H. Nelson;
President
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

Thank you for your generous donation for the amount of $250.00
We have issued a receipt number 2 on Tuesday, July 23, 2002
Below is the breakdown of payments made for the receipt :

Trans. Num.	Trans. Date	Appeal Code	Campaign Code	Fund Code	Amount
90	7/15/2002			GEN	250.00

Sincerely Yours,

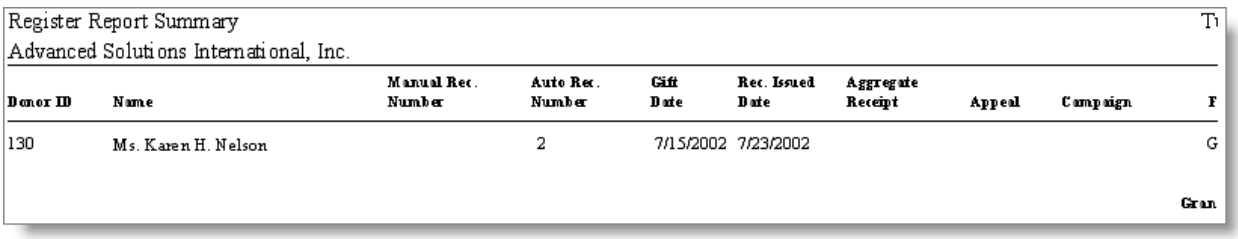
Director

Admin Console: Continuum > Fundraising reports > Receipt Thank You > Sample Thank You (Crystal)

Desktop: Fundraising > Generate reports > Receipt Thank You > Sample Thank You (Crystal)

Register report

Register Reports are used to print a report of receipts in detail or summary format.



Register Report Summary
Advanced Solutions International, Inc.

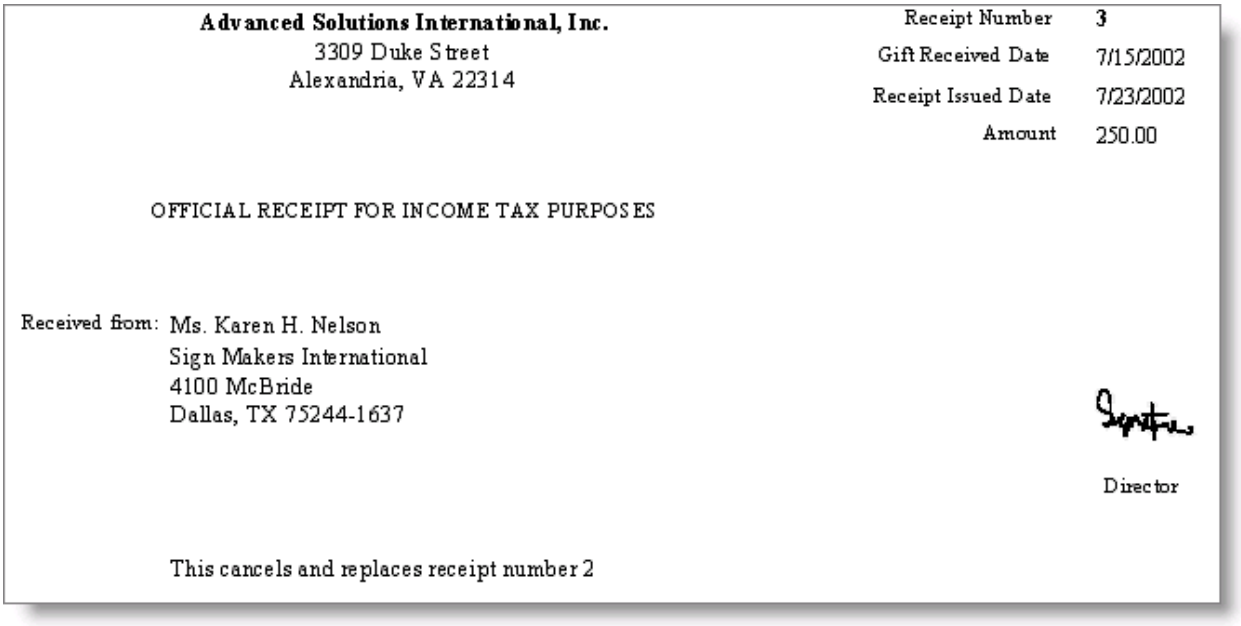
Donor ID	Name	Manual Rec. Number	Auto Rec. Number	Gift Date	Rec. Issued Date	Aggregate Receipt	Appeal	Campaign	F
130	Ms. Karen H. Nelson		2	7/15/2002	7/23/2002				G

Gran

Admin Console: Continuum > Fundraising reports > Reports, select a report from Available Reports
Desktop: Fundraising > Generate reports > Register Report > Report Types > Available Reports

Replacement Receipt report

Replacement Receipt reports are used to generate replacement receipts.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Receipt Number 3
Gift Received Date 7/15/2002
Receipt Issued Date 7/23/2002
Amount 250.00

OFFICIAL RECEIPT FOR INCOME TAX PURPOSES

Received from: Ms. Karen H. Nelson
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

Director

This cancels and replaces receipt number 2

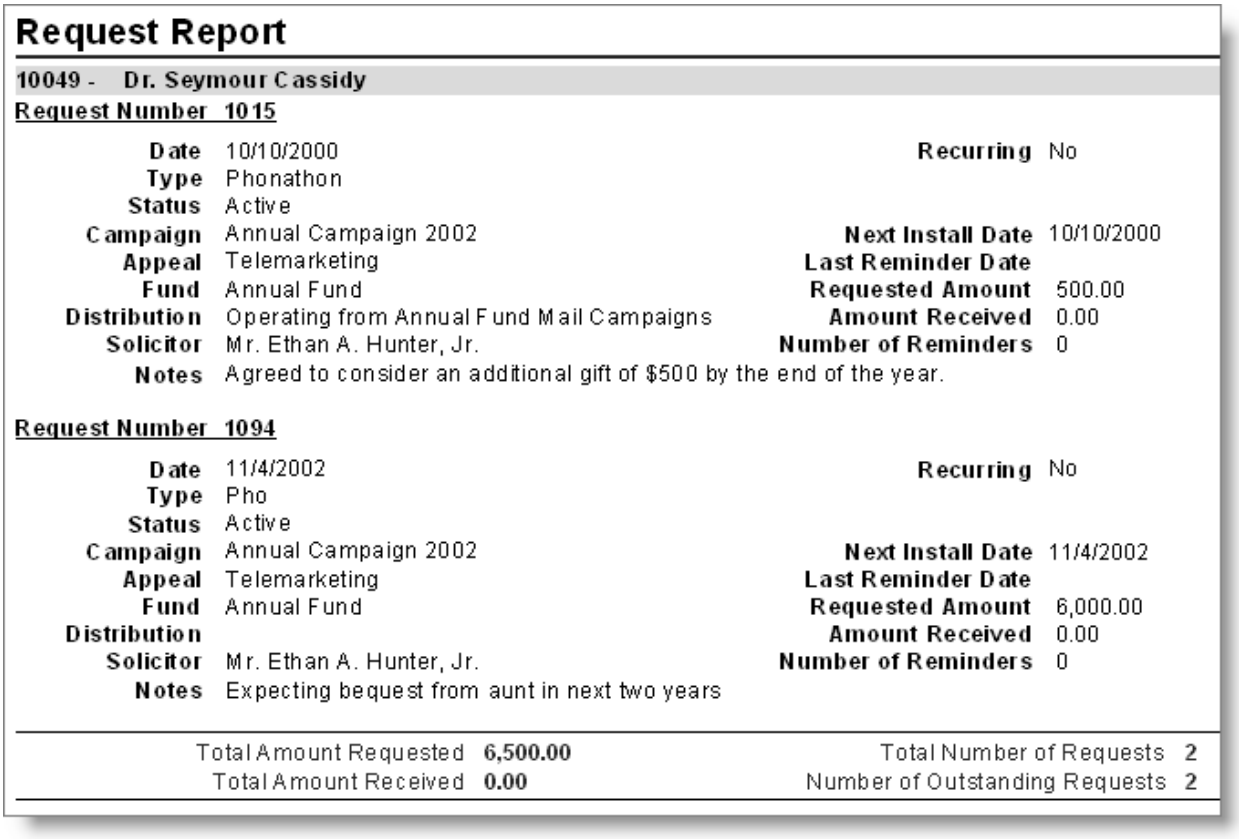
Admin Console: Continuum > Fundraising reports > Replacement Receipt
Desktop: Fundraising > Generate reports > Replacement Receipt from the Report Types scrolling list, select a report from the Available Reports scrolling list

Request Report (Crystal)

The Request Report lists the details of requests made to each donor, and the total amount of donations that resulted from those requests. The report can be run for one or for all donors, and can be filtered by ID, Campaign, Appeal, Fund, and Date Range based on Request Date. Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Note: Donations include Gifts and Pledges, including unpaid pledges.



Request Report

10049 - Dr. Seymour Cassidy

Request Number 1015

Date	10/10/2000	**Recurring**	No
Type	Phonathon		
Status	Active		
Campaign	Annual Campaign 2002	**Next Install Date**	10/10/2000
Appeal	Telemarketing	**Last Reminder Date**	
Fund	Annual Fund	**Requested Amount**	500.00
Distribution	Operating from Annual Fund Mail Campaigns	**Amount Received**	0.00
Solicitor	Mr. Ethan A. Hunter, Jr.	**Number of Reminders**	0
Notes	Agreed to consider an additional gift of $500 by the end of the year.		

Request Number 1094

Date	11/4/2002	**Recurring**	No
Type	Pho		
Status	Active		
Campaign	Annual Campaign 2002	**Next Install Date**	11/4/2002
Appeal	Telemarketing	**Last Reminder Date**	
Fund	Annual Fund	**Requested Amount**	6,000.00
Distribution		**Amount Received**	0.00
Solicitor	Mr. Ethan A. Hunter, Jr.	**Number of Reminders**	0
Notes	Expecting bequest from aunt in next two years		

Total Amount Requested	**6,500.00**	Total Number of Requests	**2**
Total Amount Received	**0.00**	Number of Outstanding Requests	**2**

Request Report

Soft Credit Report (Crystal)

The Soft Credit Report is a transaction-based report that lists all gifts and pledges that have soft credits. The report is grouped by campaign, original transaction, and donor ID.

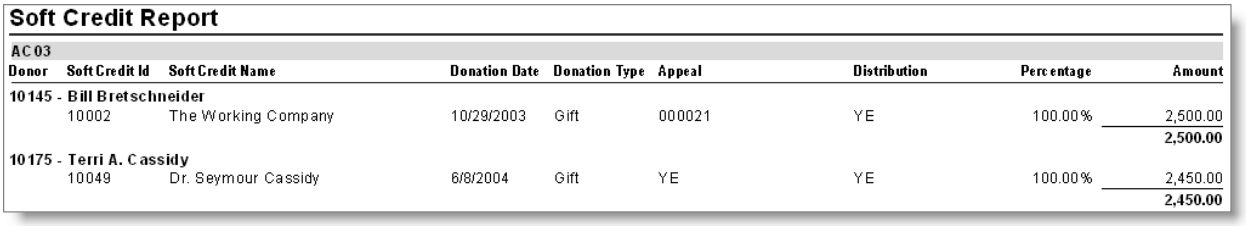
Note: Note: If a donor made multiple contributions to one or more campaigns, the Donor Name may be repeated in the report.

Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Note: Donations include Gifts and Pledges, including unpaid pledges.

The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.



Soft Credit Report

AC03

Donor	Soft Credit Id	Soft Credit Name	Donation Date	Donation Type	Appeal	Distribution	Percentage	Amount
10145 - Bill Bretschneider								
	10002	The Working Company	10/29/2003	Gift	000021	YE	100.00%	2,500.00
								2,500.00
10175 - Terri A. Cassidy								
	10049	Dr. Seymour Cassidy	6/8/2004	Gift	YE	YE	100.00%	2,450.00
								2,450.00

Soft Credit Report

Solicitor Performance Analysis (Crystal)

The Solicitor Performance Analysis report summarizes the number of donors and the number and amount of Gifts, Pledges, and Donations credited to each solicitor and also provides the percentage of total donations for which each solicitor is responsible. Run this report from:

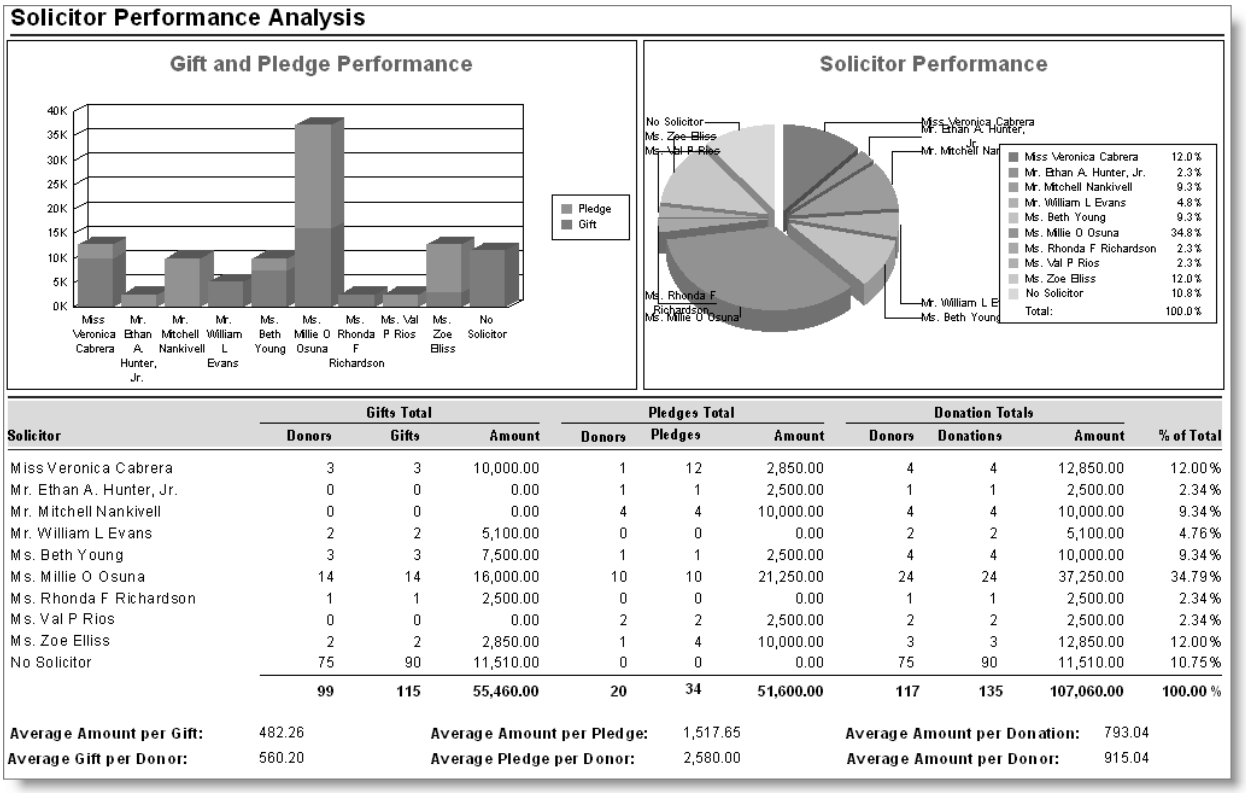
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Analysis
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Analysis, Fundraising > Executive Window

Note: Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

Note: Donations include Gifts and Pledges, including unpaid pledges.

Note: This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.

Events? Subscriptions?



Solicitor	Gifts Total Donors	Gifts	Amount	Pledges Total Donors	Pledges	Amount	Donation Totals Donors	Donations	Amount	% of Total
Miss Veronica Cabrera	3	3	10,000.00	1	12	2,850.00	4	4	12,850.00	12.00%
Mr. Ethan A. Hunter, Jr.	0	0	0.00	1	1	2,500.00	1	1	2,500.00	2.34%
Mr. Mitchell Nankivell	0	0	0.00	4	4	10,000.00	4	4	10,000.00	9.34%
Mr. William L Evans	2	2	5,100.00	0	0	0.00	2	2	5,100.00	4.76%
Ms. Beth Young	3	3	7,500.00	1	1	2,500.00	4	4	10,000.00	9.34%
Ms. Millie O Osuna	14	14	16,000.00	10	10	21,250.00	24	24	37,250.00	34.79%
Ms. Rhonda F Richardson	1	1	2,500.00	0	0	0.00	1	1	2,500.00	2.34%
Ms. Val P Rios	0	0	0.00	2	2	2,500.00	2	2	2,500.00	2.34%
Ms. Zoe Elliss	2	2	2,850.00	1	4	10,000.00	3	3	12,850.00	12.00%
No Solicitor	75	90	11,510.00	0	0	0.00	75	90	11,510.00	10.75%
	99	**115**	**55,460.00**	**20**	**34**	**51,600.00**	**117**	**135**	**107,060.00**	**100.00 %**

Average Amount per Gift:	482.26	**Average Amount per Pledge:**	1,517.65	**Average Amount per Donation:**	793.04
Average Gift per Donor:	560.20	**Average Pledge per Donor:**	2,580.00	**Average Amount per Donor:**	915.04

Solicitor Performance Analysis

Solicitor Profile (Crystal)

The Solicitor Profile report shows solicitor performance summaries by Gift and Pledge, by Campaign, by Fiscal Year, and by Distribution and also lists donation information for Donors associated with the solicitor. The report can be run for one solicitor or for all solicitors.

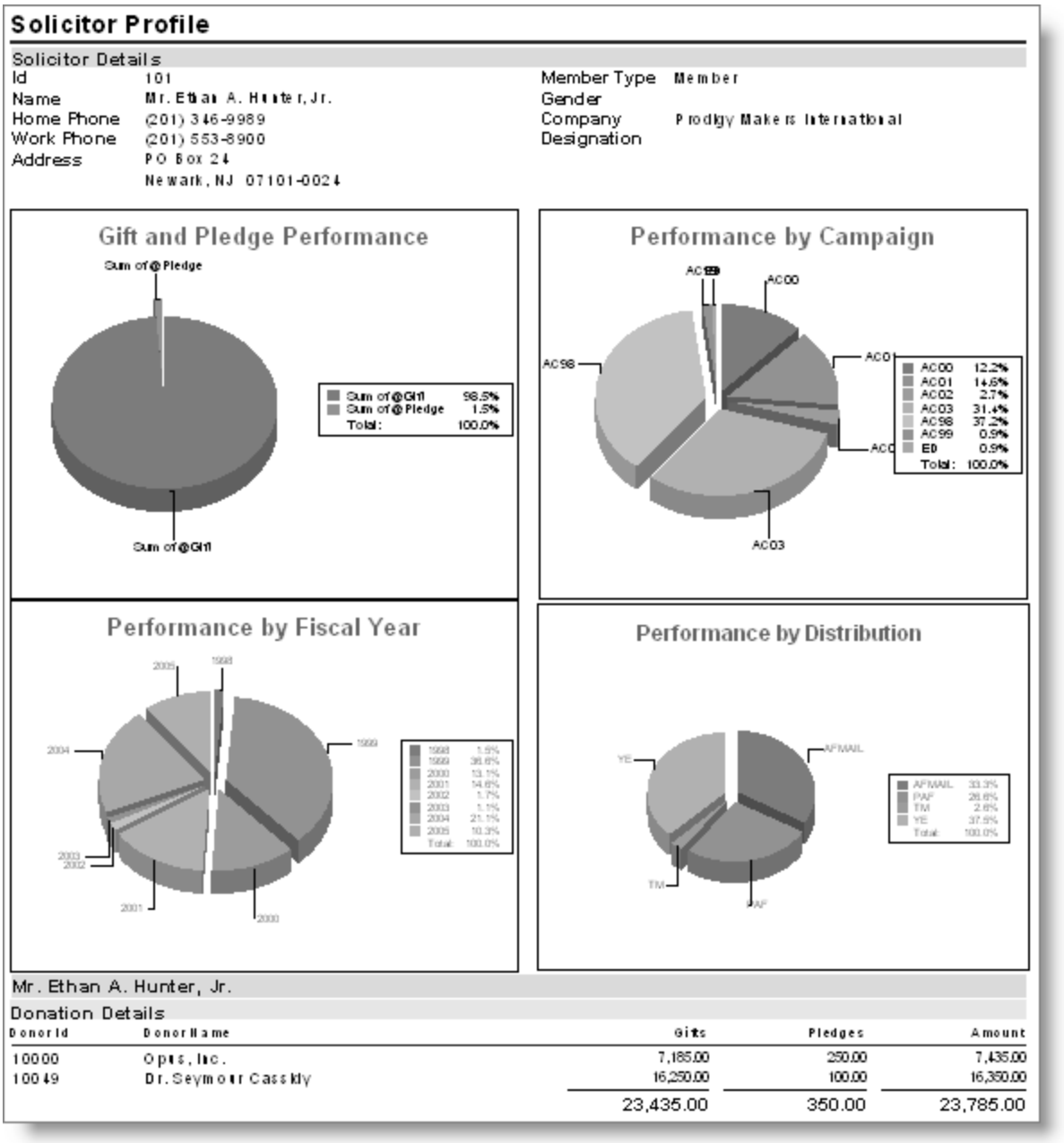
Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

Note: Note: In this report, Donations include Fundraising, Events, and Dues donations.

Note: Donations include Gifts and Pledges, including unpaid pledges.

Note: The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

This report cannot be filtered for Distribution. Adding Report Spec parameters for Distribution will produce an error.



Solicitor Profile

SYBUNT Report (Crystal)

The SYBUNT (some year but unfortunately not this year) report lists past collected funds (either gifts or payments) for all Donors who have contributed in two or more calendar years before the current year but who have not contributed this year or last year.

> **Note:** Note: To see which donors have donated last year but not this year, run the LYBUNT report.

Run this report from:

Admin Console: Continuum > Fundraising Reports > Fundraising reports > Reports
Admin Console: Continuum > Fundraising Reports > Executive reports
Desktop: Fundraising > Generate Reports > Reports, Fundraising > Executive Window

> **Note:** Note:

> **Note:** In this report, Donations include Fundraising, Events, and Dues donations.

> **Note:** This report includes Gifts and Pledge Payments. It does not include pledge income that has not been collected.

> **Note:** The amounts for Gifts and Pledges have been adjusted by any Credit/Debit memos.

This report includes Gifts and Pledge Payments. It does not include pledge income that has not been collected.

SYBUNT

		Last Donation			
Donor Id	Donor Name	Donation Type	Donation Date	Amount	LTD Total
105	Ms. Carol A. Hamilton	Gift	8/29/2000	75.00	75.00
107	Ms. Paula D. Caller, CPA	Gift	8/29/2000	50.00	50.00
108	Mr. David F. Cookie, Jr.	Gift	10/16/2000	50.00	50.00
120	Ms. Teri L. Boone	Gift	10/10/2000	125.00	125.00

Some Year but Unfortunately Not This Year (SYBUNT)

Yearly Giving Comparison by Calendar Year report

The Yearly Giving Comparison by Calendar Year report compares and summarizes the number and amounts of gifts and pledges from new and established donors for a specified year and the preceding four years. Run this report from:

Admin Console: Continuum > Fundraising Reports > Analysis
Desktop: Fundraising > Analysis

Note: Note: To view fiscal year data, run the Yearly Giving Comparison report.

Yearly Giving Comparison By Calendar Year

	5 Year Totals	2005	2004	2003	2002	2001
New Donor Statistics						
Gift Count	152	85	21	27	14	5
Pledge Count	0	0	0	0	0	0
Gift Amount	437,629.00	9,500.00	27,100.00	109,475.00	214,450.00	77,104.00
Pledge Amount	0.00	0.00	0.00	0.00	0.00	0.00
Average Amount	2,879.14	111.76	1,290.48	4,054.63	15,317.86	15,420.80
Percent of Total	51.14%	97.34%	74.61%	22.02%	98.12%	82.07%
Established Donor Statistics						
Gift Count	81	4	17	20	7	33
Pledge Count	3	0	0	1	0	2
Gift Amount	416,908.00	260.00	9,220.00	387,463.00	4,120.00	15,845.00
Pledge Amount	1,250.00	0.00	0.00	250.00	0.00	1,000.00
Average Amount	4,978.07	65.00	542.35	18,462.52	588.57	481.29
Percent of Total	48.86%	2.66%	25.39%	77.98%	1.88%	17.93%
Total Donor Statistics						
Gift Count	233	89	38	47	21	38
Pledge Count	3	0	0	1	0	2
Gift Amount	854,537.00	9,760.00	36,320.00	496,938.00	218,570.00	92,949.00
Pledge Amount	1,250.00	0.00	0.00	250.00	0.00	1,000.00
Average Amount	3,626.22	109.66	955.79	10,358.08	10,408.10	2,348.73
Percent of Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Yearly Giving Comparison by Calendar Year

Reporting performance for large Fundraising data sets

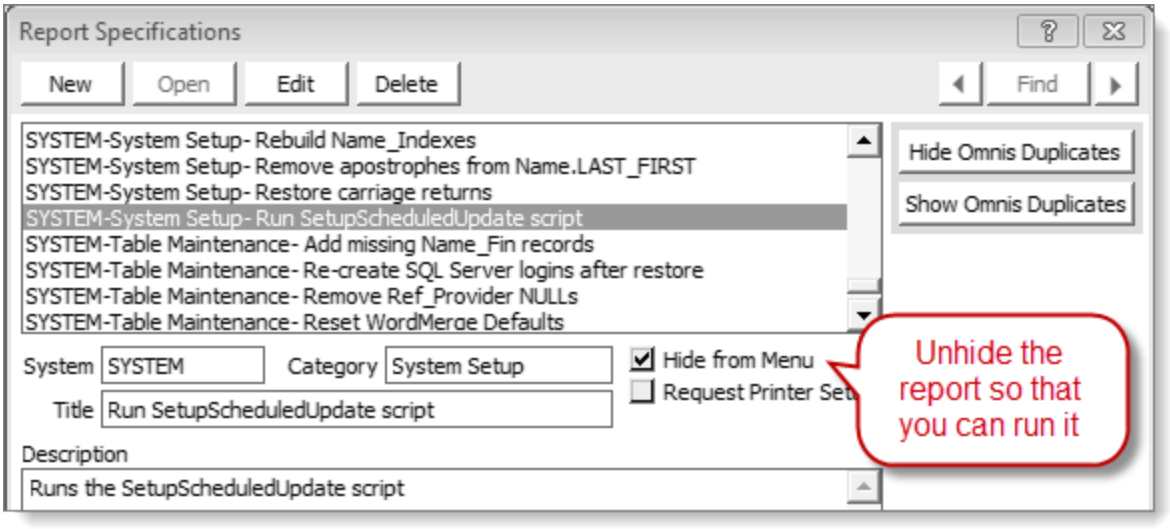
If you have a large amount of Fundraising data, you can enhance the performance of your Fundraising reports by periodically updating the Fundraising report summary tables. These tables act as a cache of pre-calculated data, so that when a report runs, only the data collected since the last time you updated the summary files must be combined, filtered, and calculated.

> **Note:** Note: Do not use these tables to create customizations. Instead, use the views that support Fundraising. These views are optimized each time you run the update procedure.

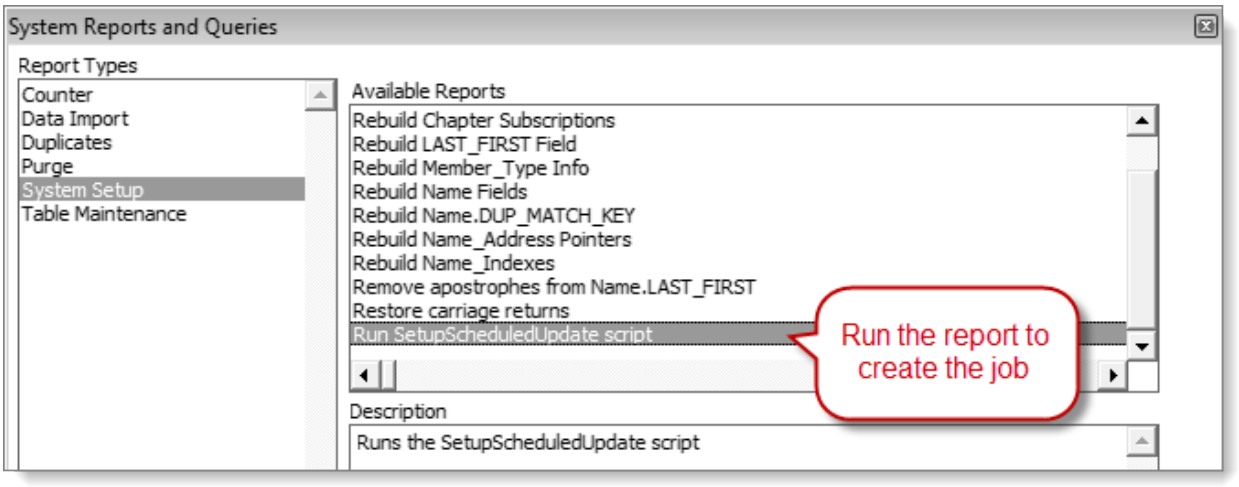
To create the job that updates FR report data

To create the job that updates these fundraising tables, unhide and then run a special report within Desktop. Once the job exists, you can run the update manually as needed.

1. From the Desktop menu, select Utilities > Report Specs.
2. Select the item titled SYSTEM-System Setup-Run SetupScheduledUpdate script.
3. Select Edit, uncheck Hide from Menu, and Save.



4. To run the script, select Utilities > Reports and Queries.
5. From Report Types, select System Setup.
6. From Available Reports, select Run SetupScheduledUpdate script.
7. Click Run.



To automate the job that updates FR report data

In SQL Server Agent, configure the update job to run automatically.

1. Enable the job titled ASI Update Fundraising Views.
2. As needed, change the job's scheduled run time, which defaults to 2:00 AM daily.

   Tip: Avoid running updates during hours when iMIS usage is heavy to avoid affecting performance.
3. After you enable the ASI Update Fundraising Views job, configure SQL Server Agent to start whenever the operating system restarts.

Hands-on exercise: Generate reports

1. From Fundraising, select Generate reports to open the Generate reports window.
2. Export a report in Microsoft Word for all gifts made during August 2009:

- Report Types: Export
- Available Reports: All Gifts to Microsoft Word
- Click Run to display the Select Date Range window.
- Enter 08/01/2009 in the Begin Date field.
- Enter 08/31/2009 in the End Date field.

- Click OK to display the Set print file name window.
- Browse to the desired folder for the file.
- Enter August 2009 in the File name: field.
- Click Save.

3. Issue a reminder for installments due during August 2009:

- Report Types: Issue
- Available Reports: Reminder for Installments Due
- Click Run to display the Select Date Range window.
- Enter 08/01/2009 in the Begin Date field.
- Enter 08/31/2009 in the End Date field.
- Click OK. The Set report destination window opens.
- Select Screen and click OK.

4. Generate a summary of all gifts made during August 2009, sorted by campaign:

- Report Types: Reports
- Available Reports: Giving Summary
- Click Run to display the Reports window.
- Enter ANNUAL in the Campaign field.
- Enter 08/01/2009 in the Date field.
- Enter 08/31/2009 in the Thru field.
- Click Run.

5. Generate a detailed list of all pledges made to the General (GEN) fund from August 1, 2009 through November 1, 2009, sorted by customer ID:

- Report Types: Reports
- Available Reports: Pledge Summary
- Click Run to display the Reports window.
- Select Member Number from the Sort & Summarize by scrolling list.
- Delete ANNUAL from the Campaign field (if still displayed from the last report run).
- Enter GEN in the Fund field.
- Enter 08/01/2009 in the Date field.
- Enter 11/01/2009 in the Thru field.
- Click Run.

Hands-on exercise: Generate reports from the Generate executive reports window

1. From Fundraising, select Generate executive reports to open the Generate executive reports window.
2. Click New.
3. Select Pledge from the Choose a Report.. scrolling list.
4. In the Comparison to Previous Period area, enter 08/01/2009 in the From field and 11/01/2009 in the Thru field.
5. Click Run.

Reports for Issues

Issue Statistics Report

The iMIS Issues module includes the Issue Statistics (IssueStatistics.rpt) report.

The Issue Statistics report provides four charts detailing statistics about the number of issues for a specified time period. The following charts are provided:

- Issue Count by Type
- Issue Count by Status
- Issue Count by Source
- Issue Count by Assignment

You can specify the date range for the issues to be included.

Reports for Legislative Tracking

Reporting Full Bill Details

iMIS Legislative Tracking includes a report called “Full Bill Detail”. This report prints all of the information available for each bill. You can create numerous user-defined search criteria to fit your reporting needs.

iMIS Legislative Tracking also offers exports of Bill details to Word Perfect and Microsoft Word, so that you can use this material in other word processing.

To report full bill details

1. Select Leg/Track> Reports.
2. Highlight the report type Bills.
3. Highlight a report format, such as Full Bill Detail.
4. Click the Run button.

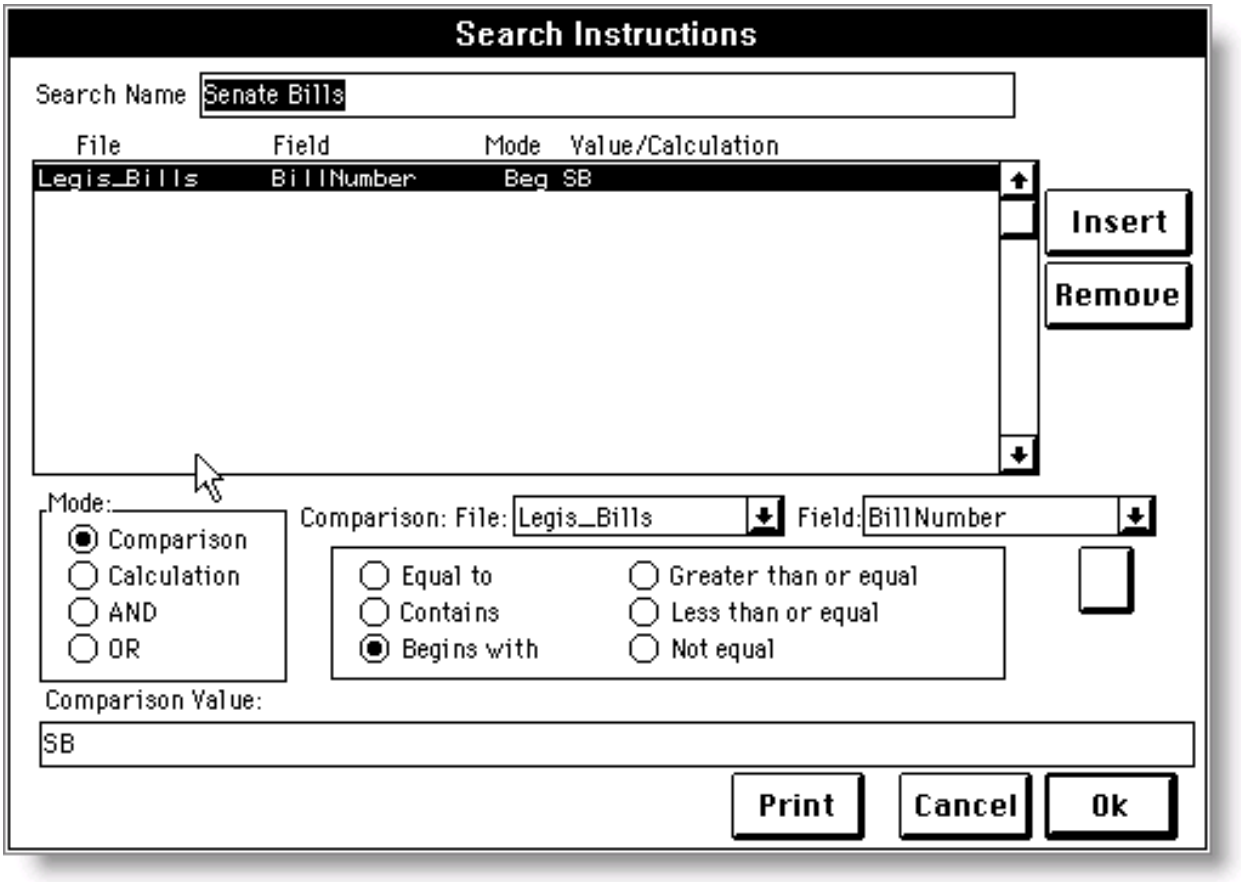
Selecting Specific Bills

The report format Full Bill Detail allows you to create report selection criteria to filter your bill records.

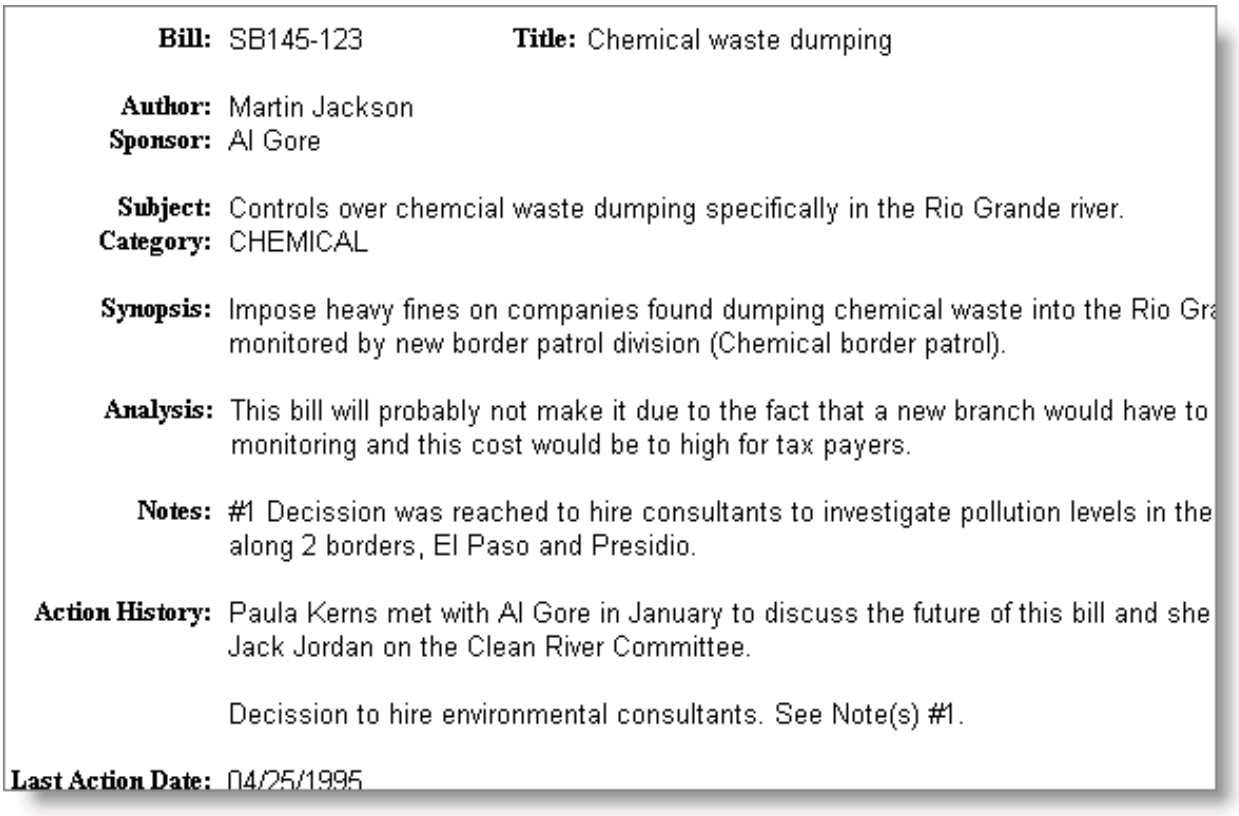
To select specific bills

1. On the Select Search Instructions window, select New, Clone, or Modify at left to open the Search Instructions window.

2. Define the comparison to use the iMIS File “Legis_Bills”.
3. Set the Field comparison to one that will allow you to make a useful search, such as “BillNumber”.
4. Press OK to generate the report.



In this example, the comparison on the field BillNumber finds all Senate Bills, which always begin with the letters “SB”.



Bill: SB145-123 **Title:** Chemical waste dumping

Author: Martin Jackson
Sponsor: Al Gore

Subject: Controls over chemcial waste dumping specifically in the Rio Grande river.
Category: CHEMICAL

Synopsis: Impose heavy fines on companies found dumping chemical waste into the Rio Gra
monitored by new border patrol division (Chemical border patrol).

Analysis: This bill will probably not make it due to the fact that a new branch would have to
monitoring and this cost would be to high for tax payers.

Notes: #1 Decission was reached to hire consultants to investigate pollution levels in the
along 2 borders, El Paso and Presidio.

Action History: Paula Kerns met with Al Gore in January to discuss the future of this bill and she
Jack Jordan on the Clean River Committee.

Decission to hire environmental consultants. See Note(s) #1.

Last Action Date: 04/25/1995

Reports for Marketing Suite

Reports for Campaigns

Report Title: Campaign Performance by Source Code

Report Name: CampaignPerformancePerSourceCode.rpt

Description: The Campaign Performance per Source Code Crystal report outlines the performance of a campaign at the Source Code level with relevant income and expenses related information.

Driver Business Object: Campaign

Associated Query/Type: Campaign by Name (Select at Runtime); use the default, select a query from the CORE (select CampaignManagement> DefaultSystem> Queries> CampaignList), or create a custom query. If you create a custom query, you must add the Campaign business object as one of the sources.

Query Parameters: Campaign Name

Grouped By: Campaign, Appeal, Solicitation

Report Fields: Campaign, Appeal, Solicitation, Source Code, Dropped Date, Total Revenue, Target Revenue, Percentage Difference, Actual Response Rate, Predicted Response Rate, Actual Cost, Net Revenue, ROI, Revenue per Thousand, Cost per Thousand, Date of First Response, Date of Last Response

Report Title: Campaign Performance by Solicitation
Report Name: CampaignPerformancePerSolicitation.rpt

Description: Outlines the performance of a campaign at the Solicitation level with summaries of relevant income and expense-related information.

Driver Business Object: Campaign

Associated Query/Type: Campaign by Name (Select at Runtime); use the default, select a query from the CORE (select CampaignManagement> DefaultSystem> Queries> CampaignList), or create a custom query. If you create a custom query, you must add the Campaign business object as one of the sources.

Query Parameters: Campaign Name

Grouped By: Campaign, Appeal, Solicitation

Report Fields: Campaign, Appeal, Solicitation, Source Code, Dropped Date, Total Revenue, Target Revenue, Percentage Difference, Actual Response Rate, Predicted Response Rate, Actual Cost, Net Revenue, ROI, Revenue per Thousand, Cost per Thousand, Date of First Response, Date of Last Response

Report Title: Campaign Purge Report
This report generates automatically when you select the Purge Campaign function.

Report Name: CampaignPurge.rpt

Description: Lists the names of the Campaign, Appeal, Solicitation, and Source Codes that have been purged.

Driver Business Object: Campaign

Associated Query/Type: All Campaigns (Select at Runtime); use the default, select a query from the CORE (select CampaignManagement> DefaultSystem> Queries> CampaignList), or create a custom query. If you create a custom query, you must add the Campaign business object as one of the sources.

Crystal Filters: Campaign Status = 1 (Inactive)

Grouped By: Campaign

Report Fields: Campaign, Appeal, Solicitation, Source Code

Report Title: Campaign Stage Report

Report Name: CampaignStage.rpt

Description: Displays the stages of a campaign that manages responses to solicitations.

Driver Business Object: Campaign

Associated Query/Type: Campaign by Name (Select at Runtime); use the default, select a query from the CORE (select CampaignManagement> DefaultSystem> Queries> CampaignList), or create a custom query. If you create a custom query, you must add the Campaign business object as one of the sources.

Crystal Filters/Parameters: SourceList = Query

Grouped By: Campaign, Appeal, Solicitation

Sorted By: Campaign, Appeal, Solicitation, Source Code

Report Fields: Source Code, Response Staging

Report Title: Confirmation Report

This report generates automatically when you select Generate Output for a Source Code. This report serves as a confirmation and helps the Campaign manager to double-check supplies prior to mailing.

Report Name: Confirmation.rpt

Description: Lists the names of Source Code, Process Definition, Inserts and Messages, Segment lists or queries, and the total number solicited for each Solicitation, Appeal, and Campaign.

Driver Business Object: Campaign

Associated Query/Type: All Campaigns (Select at Runtime); use the default, select a query from the CORE (select CampaignManagement> DefaultSystem> Queries> CampaignList), or create a custom query. If you create a custom query, you must add the Campaign business object as one of the sources.

Crystal Filters/Parameters: None; auto-generated report

Grouped By: Campaign, Appeal, Solicitation

Report Fields: Source Code, Process Definition, Insert and Messages, Segment Lists or Queries, Quantity Dropped

Reports for Segmentation

Report Title: Segmentation Definition Report

Report Name: SegmentDefinition.rpt

Description: Displays the segment definitions for a given segmentation job. Also displays the segment name, description, creation date, creator, last modified date, last modified user, and source query for each segment.

Driver Business Object: SegmentationDef

Associated Query/Type: Segment Definition by Name; use the default, select a query from the CORE (select SegmentManagement> DefaultSystem> Queries> JobList), or create a custom query. If you create a custom query, you must add the SegmentationDef business object as one of the sources.

Query Filters/Parameters: Segment Name

Grouped By: Segmentation Job

Report Fields: Job Name, Segment Name, Universe Query Filter, Description, Date Created, Creator, Date Updated, Updated by, Contacts

Report Title: Segmentation Job Report
Report Name: SegmentJob.rpt

Description: Displays the segmentation job name, universe query name, creation date, creator, last modified date, and last modified user.

Driver Business Object: SegmentationJob

Associated Query/Type: Segment Job by Name (Select at Runtime); use the default, select a query from the CORE (select SegmentManagement> DefaultSystem> Queries> JobList), or create a custom query. If you create a custom query, you must add the SegmentationJob business object as one of the sources.

Query Filters/Parameters: Name

Report Fields: Job Name, Universe Query Filter, Date Created, Creator, Date Updated, Updated by

Reports for RFM

Report Title: RFM Analysis Profile
Report Name: RFMProfile.rpt

Description: Prints a profile for the specified RFM analysis with detailed information on date created, user created, date last run, and population and transaction query.

Driver Business Object: RFMAnalysis

Associated Query/Type: RFM Analysis by Name (Select at Runtime); use the default, select a query from the CORE (select RFMAnalysist> DefaultSystem> Queries> RFMList), or create a custom query. If you create a custom query, you must add the RFMAnalysis business object as one of the sources.

Query Filters/Parameters: RFMAnalysisName

Grouped By: RFMAnalysisName

Report Fields: Analysis Name, Date Created, User Created

Sub-report Fields: RFMProfileRecencySub: Recency Ranking Group, Number of Contacts

Sub-report Fields: RFMProfileFrequencySub: Frequency Ranking Group, Number of Contacts

Sub-report Fields: RFMProfileMonetarySub: Monetary Ranking Group, Number of Contacts

Report Title: RFM Analysis Report
Report Name: RFMRunPreview.rpt

Description: Prints the number of individuals assigned to the group for each ranking group in the series, the least and most recent transaction date, the lowest and highest individual count of transactions, and lowest and highest individual transaction total. This report can be run as a preview or as a final report.

Driver Business Object: RFMAnalysis

Associated Query/Type: RFM Analysis by Name (Select at Runtime); use the default, select a query from the CORE (select RFMAnalysist> DefaultSystem> Queries> RFMList), or create a custom query. If you create a custom query, you must add the RFMAnalysis business object as one of the sources.

Query Filters/Parameters: RFMAnalysisName

Grouped By: RFMAnalysisName

Report Fields: Analysis Name, Date Created

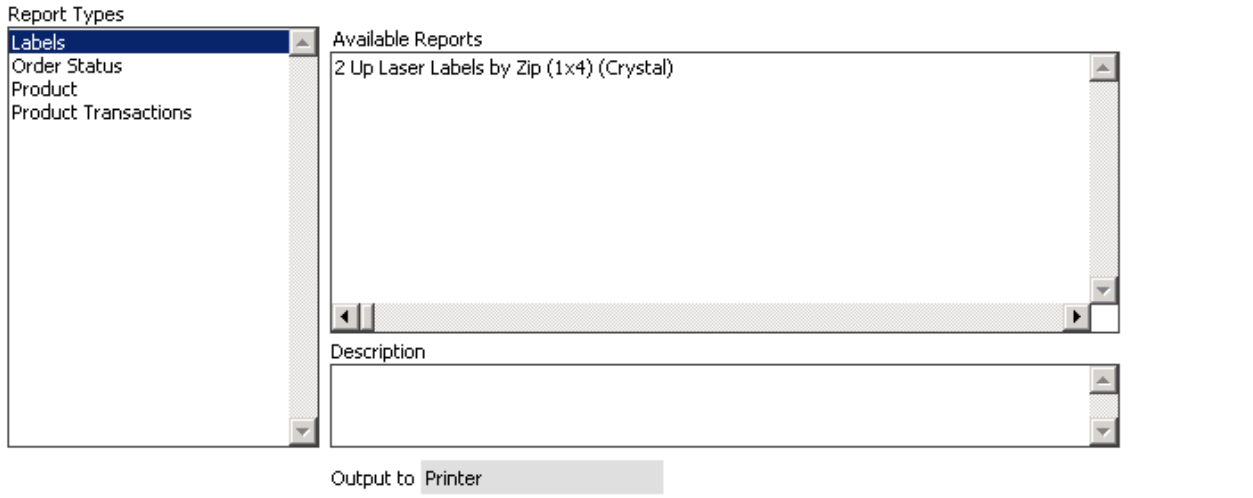
Sub-report Fields: RFMRunPreviewRecencySub: Recency Ranking Group, Number of Contacts, Percentage, Earliest Contact, Latest Contact

Sub-report Fields: RFMRunPreviewFrequencySub: Frequency Ranking Group, Number of Contacts, Percentage, Lowest Count, Highest Count

Sub-report Fields: RFMRunPreviewMonetarySub: Monetary Ranking Group, Number of Contacts, Percentage, Lowest Amount, Highest Amount

Reports for Orders

Order processing reports window

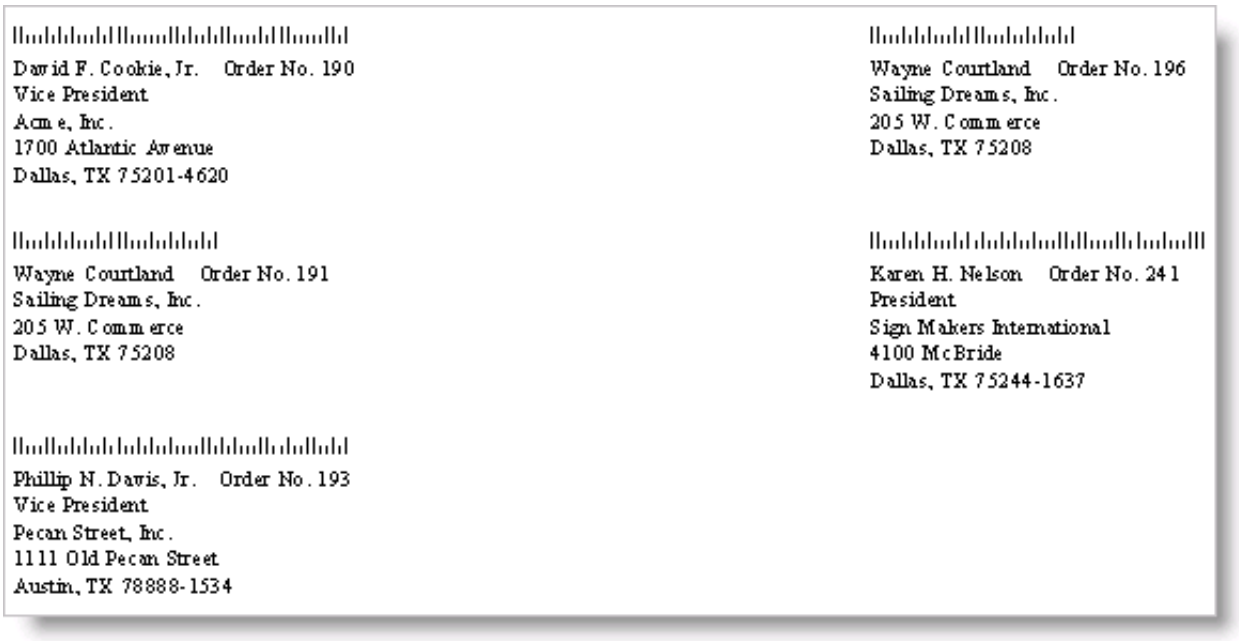


Admin Console: Continuum > Events and Orders Reports > Order processing reports

Desktop: Orders > Generate reports

Label report

The Label report prints shipping labels for orders with an order status of SHIPMENT.



David F. Cookie, Jr. Order No. 190
Vice President
Acme, Inc.
1700 Atlantic Avenue
Dallas, TX 75201-4620

Wayne Courtland Order No. 196
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Wayne Courtland Order No. 191
Sailing Dreams, Inc.
205 W. Commerce
Dallas, TX 75208

Karen H. Nelson Order No. 241
President
Sign Makers International
4100 McBride
Dallas, TX 75244-1637

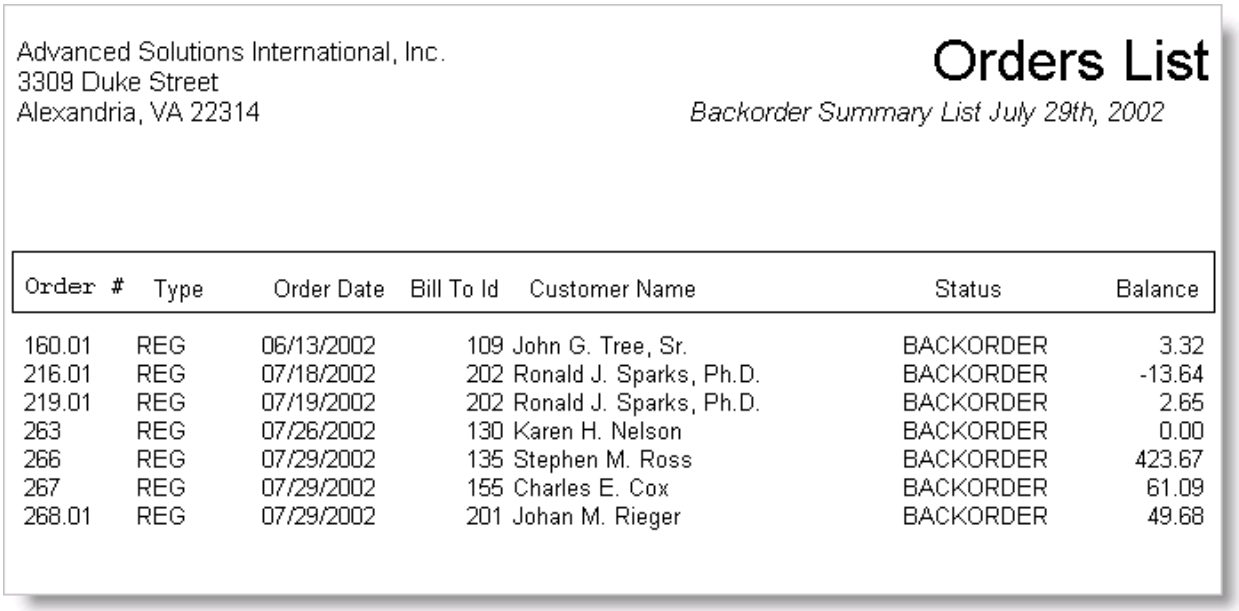
Phillip N. Davis, Jr. Order No. 193
Vice President
Pecan Street, Inc.
1111 Old Pecan Street
Austin, TX 78888-1534

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Labels

Desktop: Orders > Generate reports > Labels, select the available label report, and click Run

Backorder report

The Backorder Summary List report lists all of the orders with a status of BACKORDER.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Orders List

Backorder Summary List July 29th, 2002

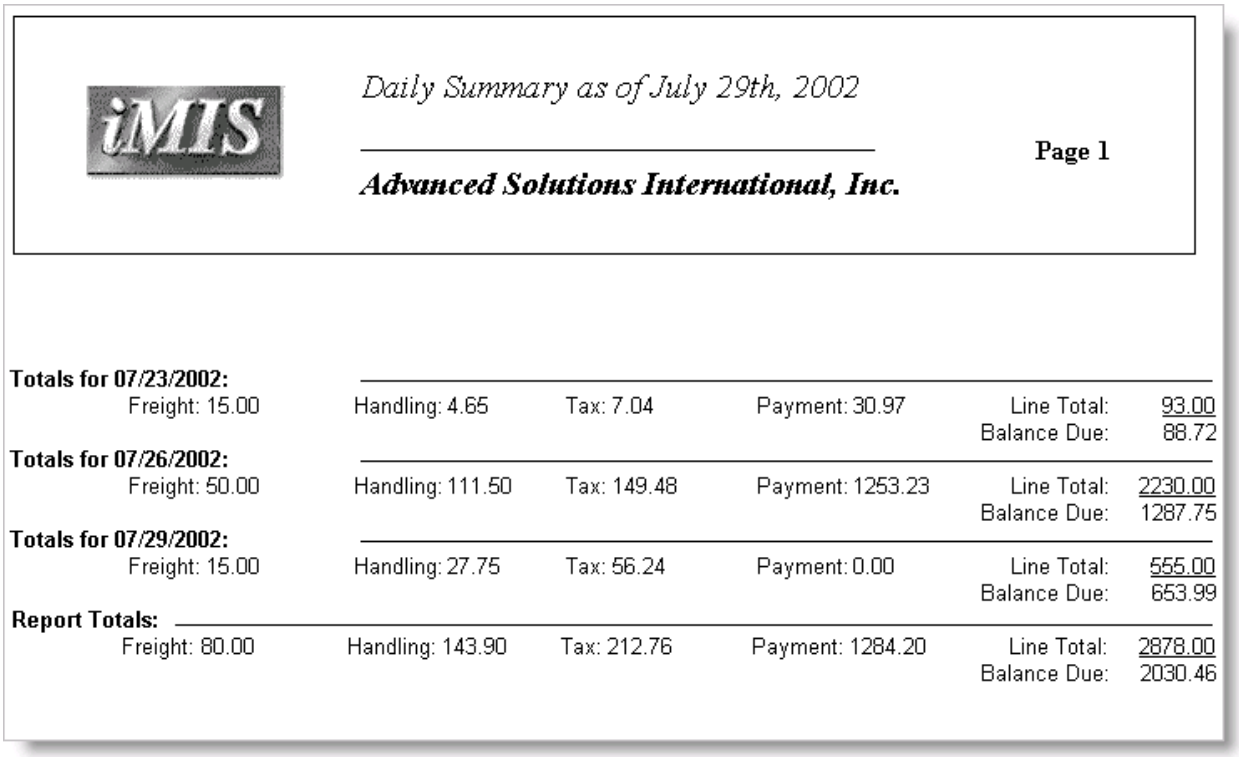
Order #	Type	Order Date	Bill To Id	Customer Name	Status	Balance
160.01	REG	06/13/2002	109	John G. Tree, Sr.	BACKORDER	3.32
216.01	REG	07/18/2002	202	Ronald J. Sparks, Ph.D.	BACKORDER	-13.64
219.01	REG	07/19/2002	202	Ronald J. Sparks, Ph.D.	BACKORDER	2.65
263	REG	07/26/2002	130	Karen H. Nelson	BACKORDER	0.00
266	REG	07/29/2002	135	Stephen M. Ross	BACKORDER	423.67
267	REG	07/29/2002	155	Charles E. Cox	BACKORDER	61.09
268.01	REG	07/29/2002	201	Johan M. Rieger	BACKORDER	49.68

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Backorder Summary List

Desktop: Orders > Generate reports > Order Status> Backorder Summary List > and click Run

Daily Summary report

The Daily Summary report lists a daily summary of all order activities. You can print a report for either a single date or a series of dates.



Daily Summary as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Totals for 07/23/2002:					
Freight: 15.00	Handling: 4.65	Tax: 7.04	Payment: 30.97	Line Total:	93.00
				Balance Due:	88.72
Totals for 07/26/2002:					
Freight: 50.00	Handling: 111.50	Tax: 149.48	Payment: 1253.23	Line Total:	2230.00
				Balance Due:	1287.75
Totals for 07/29/2002:					
Freight: 15.00	Handling: 27.75	Tax: 56.24	Payment: 0.00	Line Total:	555.00
				Balance Due:	653.99
Report Totals:					
Freight: 80.00	Handling: 143.90	Tax: 212.76	Payment: 1284.20	Line Total:	2878.00
				Balance Due:	2030.46

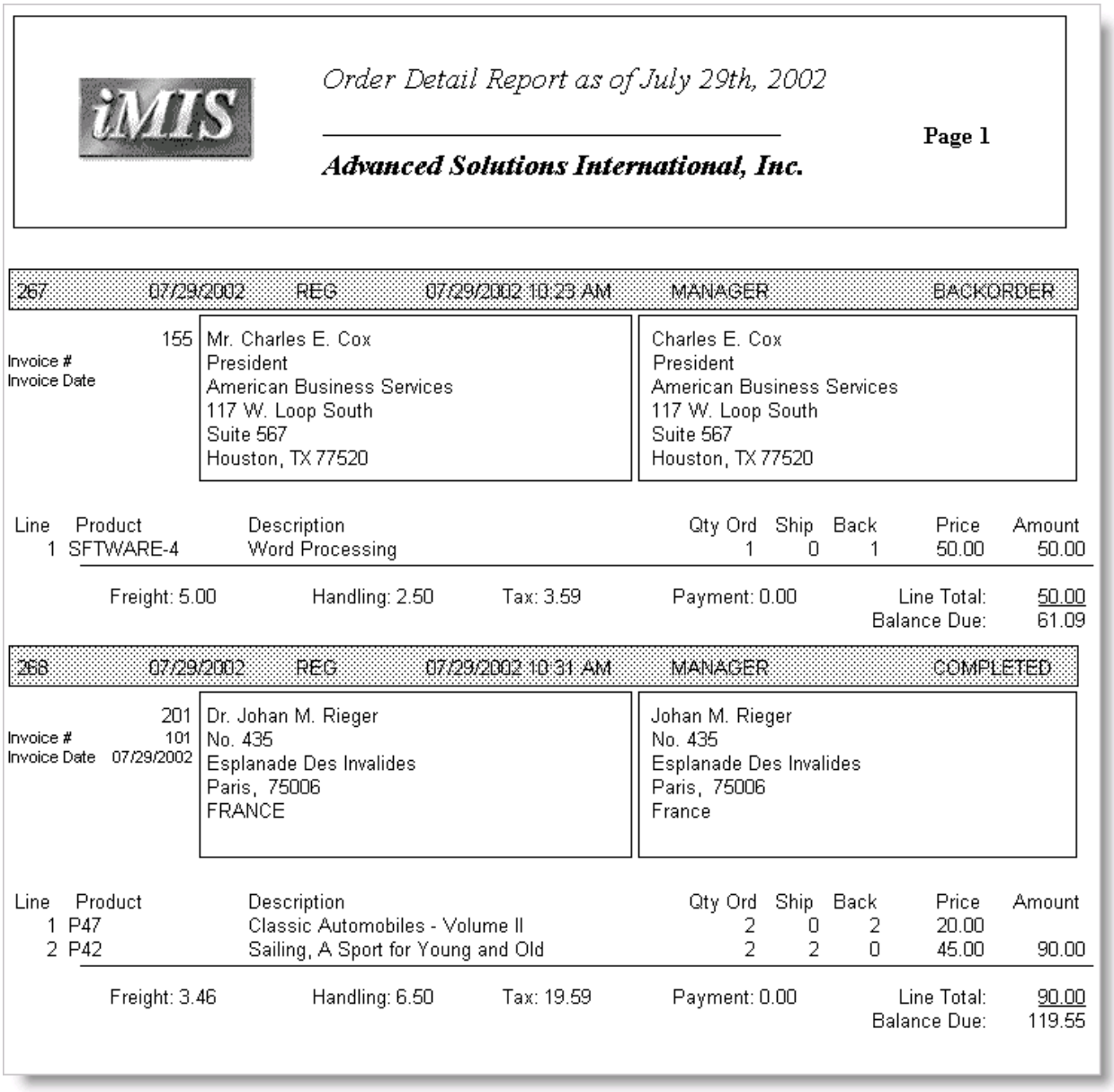
Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Daily Summary

Desktop: Orders > Generate reports > Order Status > Daily Summary, click Run, select the date range, and click OK

Order Detail report

The Order Detail report lists all of the orders for a selected date range. If you want to generate a select group of orders, reports can be generated according to status, status and

type, order batch, and orders on hold.



Order Detail Report as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

267 07/29/2002 REG 07/29/2002 10:23 AM MANAGER BACKORDER

Invoice # 155
Invoice Date

Mr. Charles E. Cox
President
American Business Services
117 W. Loop South
Suite 567
Houston, TX 77520

Charles E. Cox
President
American Business Services
117 W. Loop South
Suite 567
Houston, TX 77520

Line	Product	Description	Qty Ord	Ship	Back	Price	Amount
1	SFTWARE-4	Word Processing	1	0	1	50.00	50.00

Freight: 5.00 Handling: 2.50 Tax: 3.59 Payment: 0.00 Line Total: 50.00
Balance Due: 61.09

268 07/29/2002 REG 07/29/2002 10:31 AM MANAGER COMPLETED

Invoice # 201
Invoice Date 101 07/29/2002

Dr. Johan M. Rieger
No. 435
Esplanade Des Invalides
Paris, 75006
FRANCE

Johan M. Rieger
No. 435
Esplanade Des Invalides
Paris, 75006
France

Line	Product	Description	Qty Ord	Ship	Back	Price	Amount
1	P47	Classic Automobiles - Volume II	2	0	2	20.00	
2	P42	Sailing, A Sport for Young and Old	2	2	0	45.00	90.00

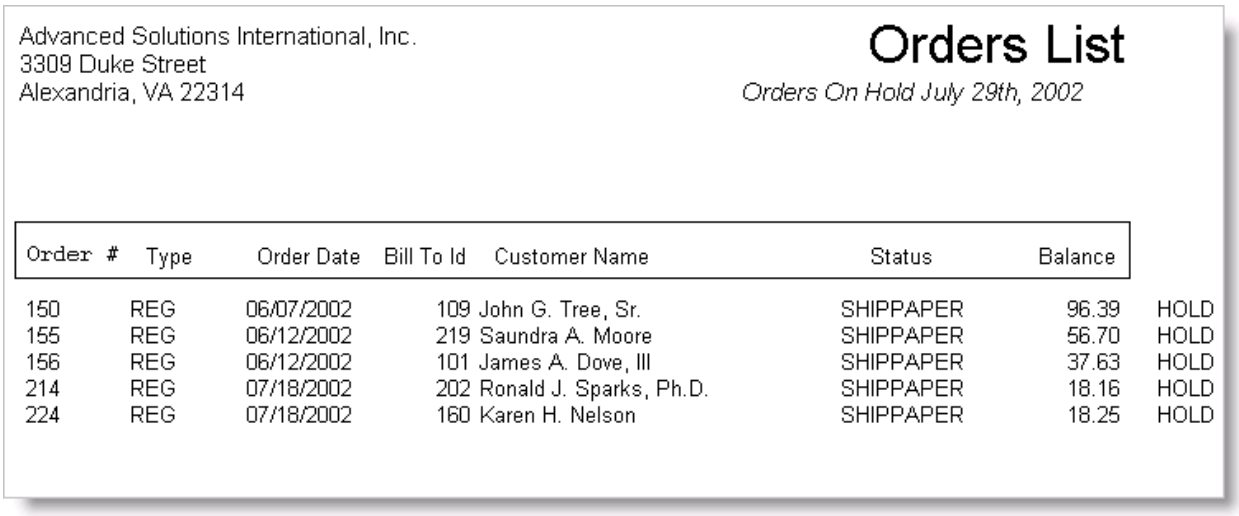
Freight: 3.46 Handling: 6.50 Tax: 19.59 Payment: 0.00 Line Total: 90.00
Balance Due: 119.55

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Order Detail Report

Desktop: Orders > Generate reports > Order Status > Order Detail Report, click Run, click, select the date range, and click OK

Orders on Hold report

The Orders on Hold report lists all of the orders that are on hold.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Orders List

Orders On Hold July 29th, 2002

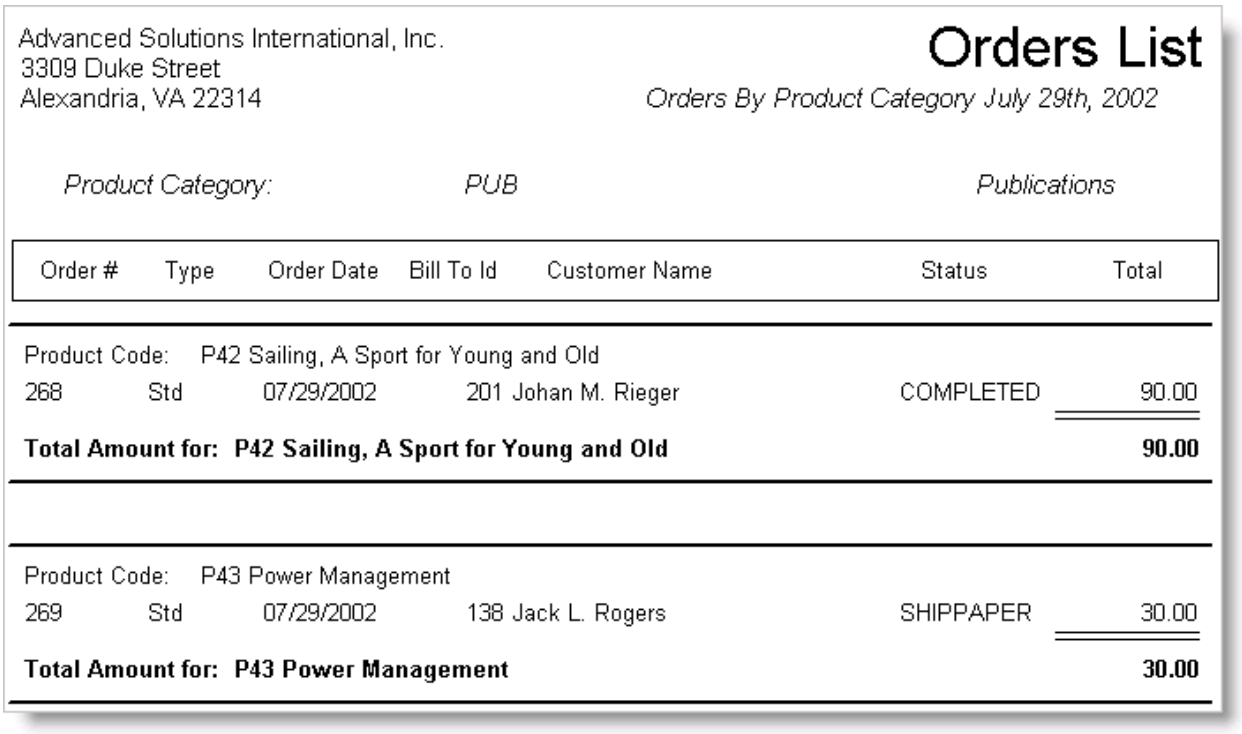
Order #	Type	Order Date	Bill To Id	Customer Name	Status	Balance	
150	REG	06/07/2002	109	John G. Tree, Sr.	SHIPPAPER	96.39	HOLD
155	REG	06/12/2002	219	Saundra A. Moore	SHIPPAPER	56.70	HOLD
156	REG	06/12/2002	101	James A. Dove, III	SHIPPAPER	37.63	HOLD
214	REG	07/18/2002	202	Ronald J. Sparks, Ph.D.	SHIPPAPER	18.16	HOLD
224	REG	07/18/2002	160	Karen H. Nelson	SHIPPAPER	18.25	HOLD

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Order Status > Orders On Hold

Desktop: Orders > Generate reports > Order Status > Orders on Hold, and click Run

Orders by Product Category report

The Orders by Product Category report lists all orders within a specified date range for a specified product category.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Orders List

Orders By Product Category July 29th, 2002

Product Category: *PUB* *Publications*

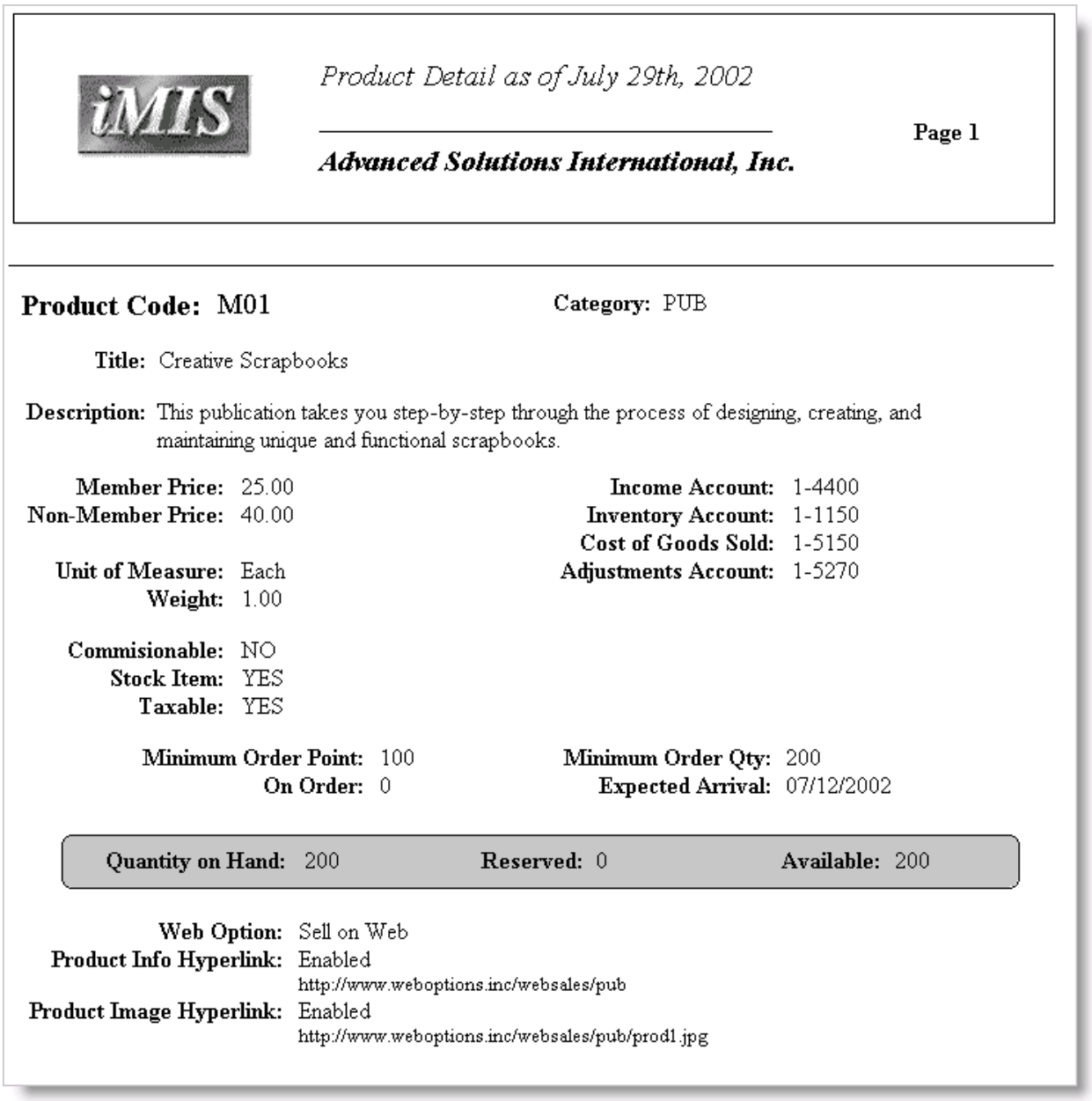
Order #	Type	Order Date	Bill To Id	Customer Name	Status	Total
Product Code: P42 Sailing, A Sport for Young and Old						
268	Std	07/29/2002	201	Johan M. Rieger	COMPLETED	90.00
Total Amount for: P42 Sailing, A Sport for Young and Old						**90.00**
Product Code: P43 Power Management						
269	Std	07/29/2002	138	Jack L. Rogers	SHIPPAPER	30.00
Total Amount for: P43 Power Management						**30.00**

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Orders by Product Category

Desktop: Orders > Generate reports > Product > Orders by Product Category, click Run, select a date range and product category, and click OK

Product Detail report

The Product Detail report lists the details you have defined for each of your products.



Product Detail as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Product Code: M01 **Category:** PUB

Title: Creative Scrapbooks

Description: This publication takes you step-by-step through the process of designing, creating, and maintaining unique and functional scrapbooks.

Member Price: 25.00
Non-Member Price: 40.00

Unit of Measure: Each
Weight: 1.00

Commisionable: NO
Stock Item: YES
Taxable: YES

Income Account: 1-4400
Inventory Account: 1-1150
Cost of Goods Sold: 1-5150
Adjustments Account: 1-5270

Minimum Order Point: 100
On Order: 0

Minimum Order Qty: 200
Expected Arrival: 07/12/2002

Quantity on Hand: 200 **Reserved:** 0 **Available:** 200

Web Option: Sell on Web
Product Info Hyperlink: Enabled
http://www.weboptions.inc/websales/pub
Product Image Hyperlink: Enabled
http://www.weboptions.inc/websales/pub/prod1.jpg

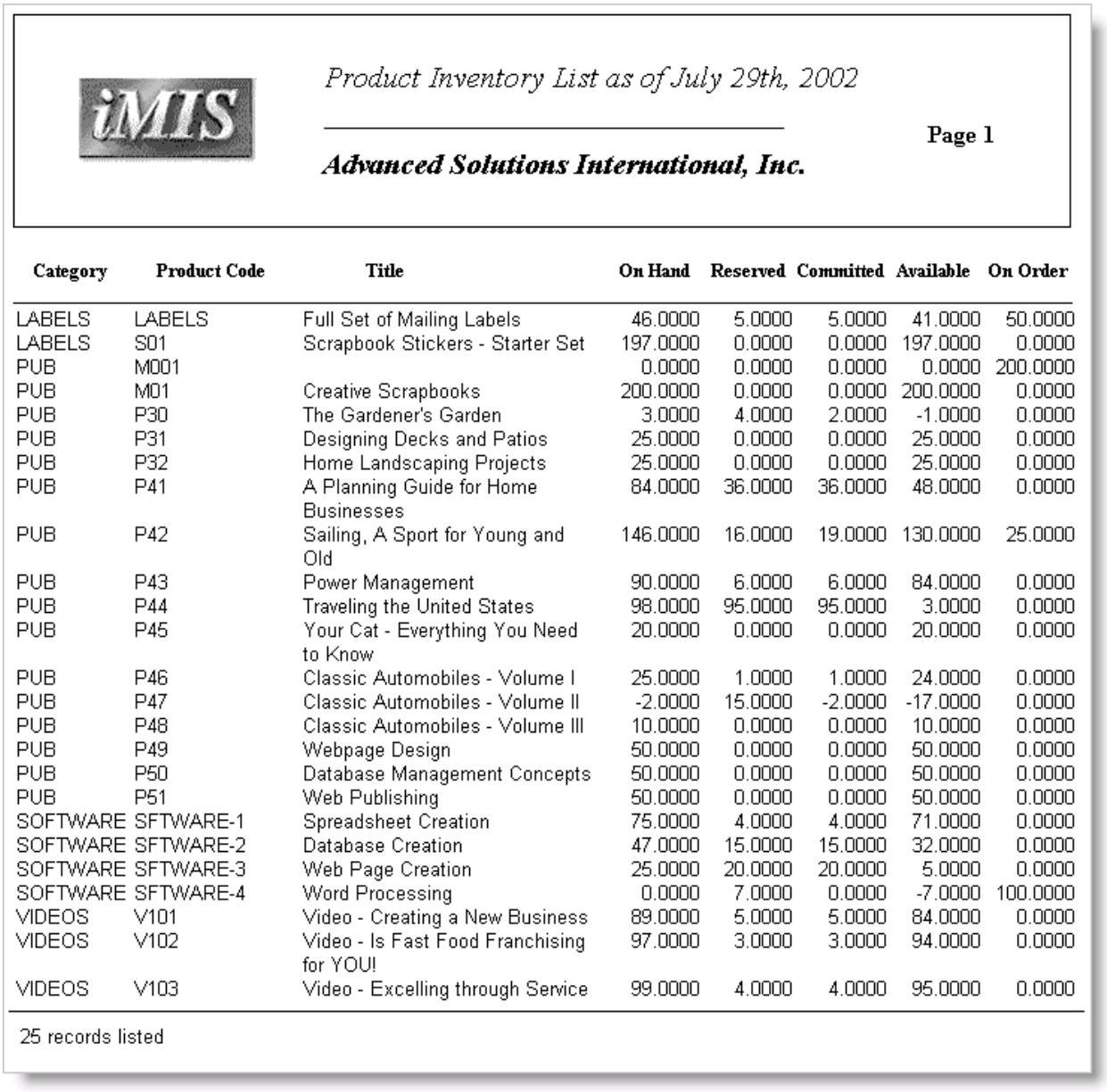
Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Detail

Desktop: Orders > Generate reports > Product > Product Detail, and click Run

Product Inventory List report

The Product Inventory List report lists all of your products and each product's inventory levels. You can generate a list for products that are on hand or for all of the products that

your organization offers for sale. You also have the option of sorting the products by either product category or product code.



Product Inventory List as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Category	Product Code	Title	On Hand	Reserved	Committed	Available	On Order
LABELS	LABELS	Full Set of Mailing Labels	46.0000	5.0000	5.0000	41.0000	50.0000
LABELS	S01	Scrapbook Stickers - Starter Set	197.0000	0.0000	0.0000	197.0000	0.0000
PUB	M001		0.0000	0.0000	0.0000	0.0000	200.0000
PUB	M01	Creative Scrapbooks	200.0000	0.0000	0.0000	200.0000	0.0000
PUB	P30	The Gardener's Garden	3.0000	4.0000	2.0000	-1.0000	0.0000
PUB	P31	Designing Decks and Patios	25.0000	0.0000	0.0000	25.0000	0.0000
PUB	P32	Home Landscaping Projects	25.0000	0.0000	0.0000	25.0000	0.0000
PUB	P41	A Planning Guide for Home Businesses	84.0000	36.0000	36.0000	48.0000	0.0000
PUB	P42	Sailing, A Sport for Young and Old	146.0000	16.0000	19.0000	130.0000	25.0000
PUB	P43	Power Management	90.0000	6.0000	6.0000	84.0000	0.0000
PUB	P44	Traveling the United States	98.0000	95.0000	95.0000	3.0000	0.0000
PUB	P45	Your Cat - Everything You Need to Know	20.0000	0.0000	0.0000	20.0000	0.0000
PUB	P46	Classic Automobiles - Volume I	25.0000	1.0000	1.0000	24.0000	0.0000
PUB	P47	Classic Automobiles - Volume II	-2.0000	15.0000	-2.0000	-17.0000	0.0000
PUB	P48	Classic Automobiles - Volume III	10.0000	0.0000	0.0000	10.0000	0.0000
PUB	P49	Webpage Design	50.0000	0.0000	0.0000	50.0000	0.0000
PUB	P50	Database Management Concepts	50.0000	0.0000	0.0000	50.0000	0.0000
PUB	P51	Web Publishing	50.0000	0.0000	0.0000	50.0000	0.0000
SOFTWARE	SFTWARE-1	Spreadsheet Creation	75.0000	4.0000	4.0000	71.0000	0.0000
SOFTWARE	SFTWARE-2	Database Creation	47.0000	15.0000	15.0000	32.0000	0.0000
SOFTWARE	SFTWARE-3	Web Page Creation	25.0000	20.0000	20.0000	5.0000	0.0000
SOFTWARE	SFTWARE-4	Word Processing	0.0000	7.0000	0.0000	-7.0000	100.0000
VIDEOS	V101	Video - Creating a New Business	89.0000	5.0000	5.0000	84.0000	0.0000
VIDEOS	V102	Video - Is Fast Food Franchising for YOU!	97.0000	3.0000	3.0000	94.0000	0.0000
VIDEOS	V103	Video - Excelling through Service	99.0000	4.0000	4.0000	95.0000	0.0000

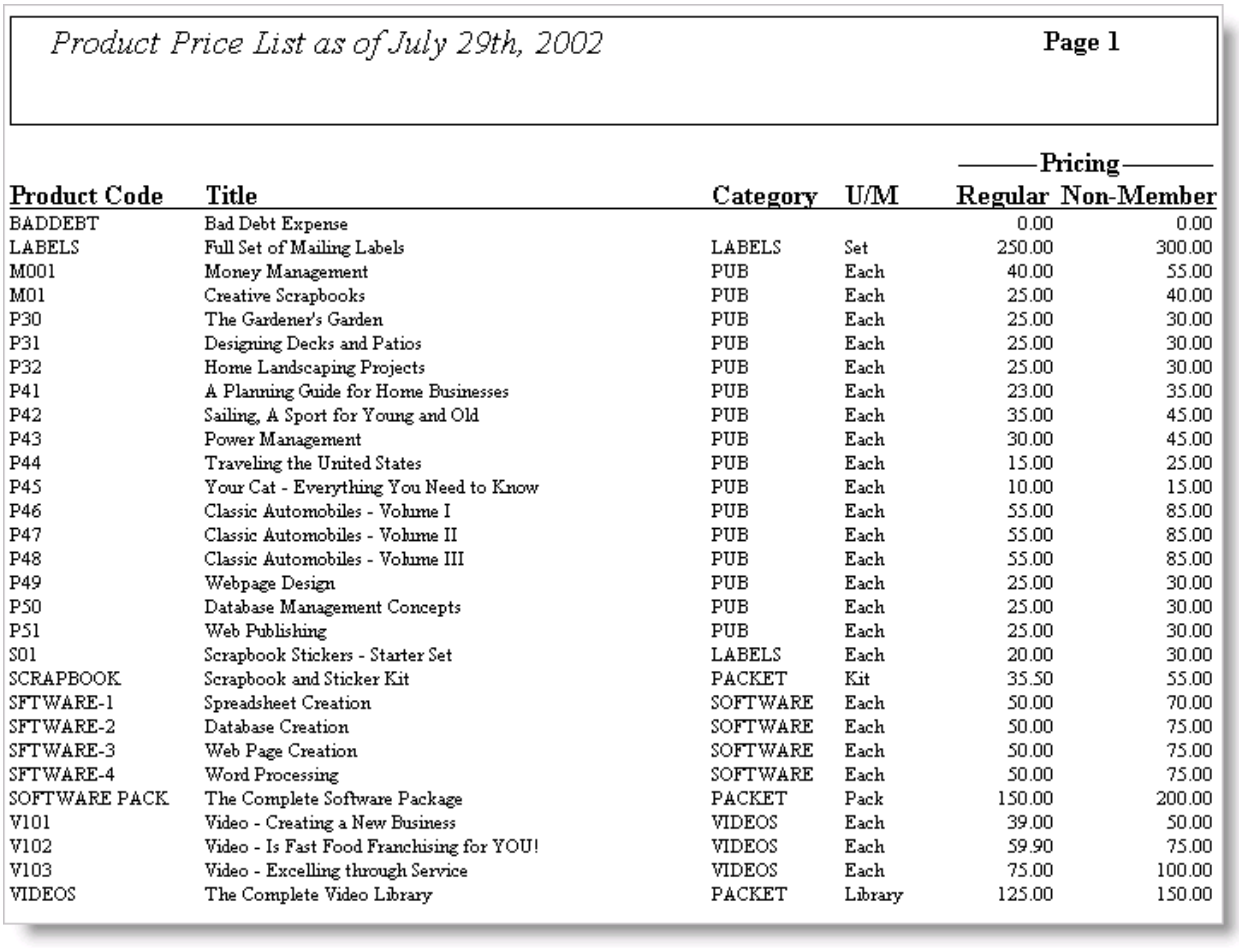
25 records listed

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Inventory List

Desktop: Orders > Generate reports > Product > Product Inventory List, click Run, select which product to include and how to sort the products, and click OK

Product Price List report

The Product Price List report lists the prices for all of your products.



Product Price List as of July 29th, 2002 **Page 1**

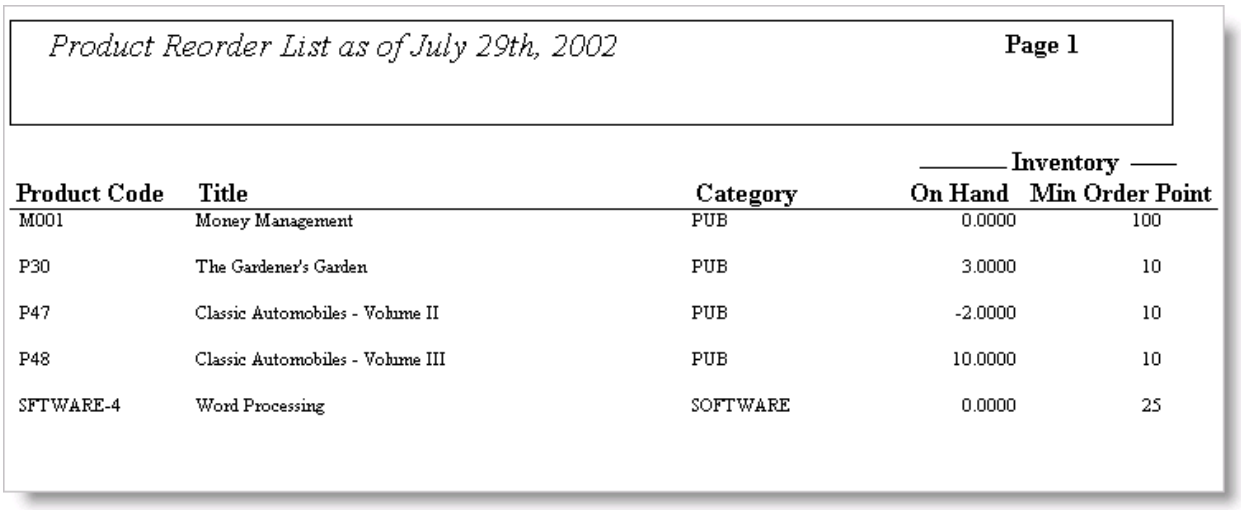
Product Code	Title	Category	U/M	Pricing	
				Regular	Non-Member
BADDEBT	Bad Debt Expense			0.00	0.00
LABELS	Full Set of Mailing Labels	LABELS	Set	250.00	300.00
M001	Money Management	PUB	Each	40.00	55.00
M01	Creative Scrapbooks	PUB	Each	25.00	40.00
P30	The Gardener's Garden	PUB	Each	25.00	30.00
P31	Designing Decks and Patios	PUB	Each	25.00	30.00
P32	Home Landscaping Projects	PUB	Each	25.00	30.00
P41	A Planning Guide for Home Businesses	PUB	Each	23.00	35.00
P42	Sailing, A Sport for Young and Old	PUB	Each	35.00	45.00
P43	Power Management	PUB	Each	30.00	45.00
P44	Traveling the United States	PUB	Each	15.00	25.00
P45	Your Cat - Everything You Need to Know	PUB	Each	10.00	15.00
P46	Classic Automobiles - Volume I	PUB	Each	55.00	85.00
P47	Classic Automobiles - Volume II	PUB	Each	55.00	85.00
P48	Classic Automobiles - Volume III	PUB	Each	55.00	85.00
P49	Webpage Design	PUB	Each	25.00	30.00
P50	Database Management Concepts	PUB	Each	25.00	30.00
P51	Web Publishing	PUB	Each	25.00	30.00
S01	Scrapbook Stickers - Starter Set	LABELS	Each	20.00	30.00
SCRAPBOOK	Scrapbook and Sticker Kit	PACKET	Kit	35.50	55.00
SFTWARE-1	Spreadsheet Creation	SOFTWARE	Each	50.00	70.00
SFTWARE-2	Database Creation	SOFTWARE	Each	50.00	75.00
SFTWARE-3	Web Page Creation	SOFTWARE	Each	50.00	75.00
SFTWARE-4	Word Processing	SOFTWARE	Each	50.00	75.00
SOFTWARE PACK	The Complete Software Package	PACKET	Pack	150.00	200.00
V101	Video - Creating a New Business	VIDEOS	Each	39.00	50.00
V102	Video - Is Fast Food Franchising for YOU!	VIDEOS	Each	59.90	75.00
V103	Video - Excelling through Service	VIDEOS	Each	75.00	100.00
VIDEOS	The Complete Video Library	PACKET	Library	125.00	150.00

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Price List

Desktop: Orders, select Generate reports > Product > Product Price List, and click Run

Product Reorder List report

The Product Reorder List report lists your products that are at or below the reorder point defined for each product.



Product Reorder List as of July 29th, 2002 **Page 1**

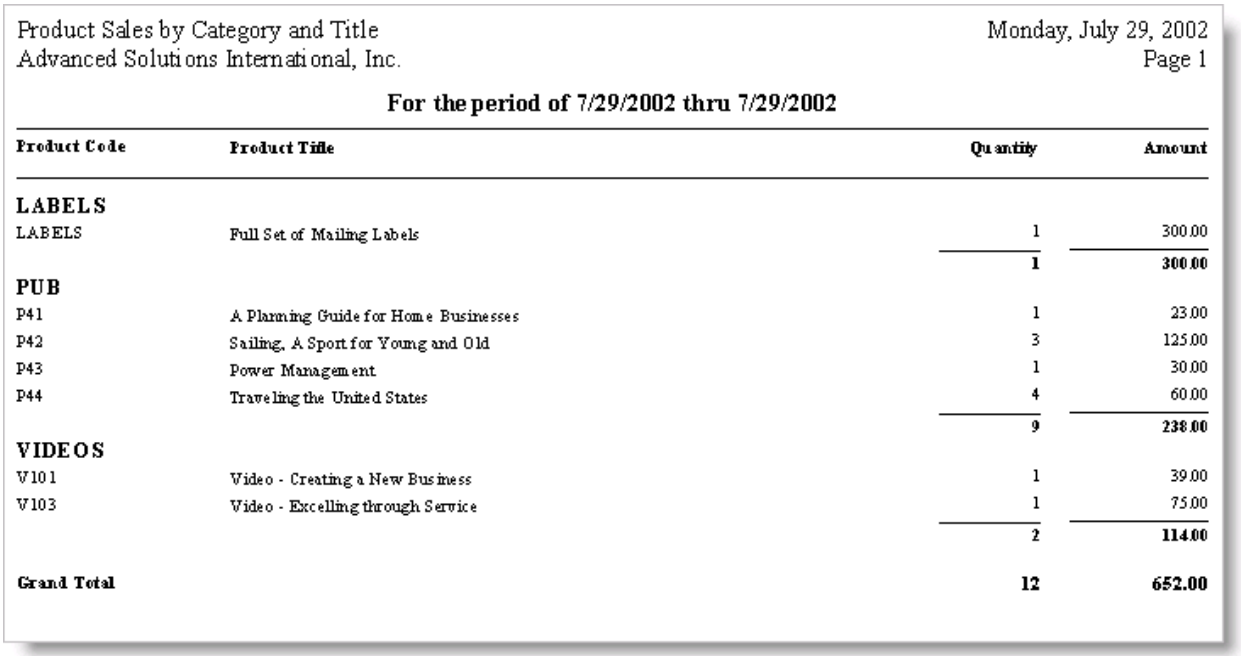
Product Code	Title	Category	Inventory On Hand	Inventory Min Order Point
M001	Money Management	PUB	0.0000	100
P30	The Gardener's Garden	PUB	3.0000	10
P47	Classic Automobiles - Volume II	PUB	-2.0000	10
P48	Classic Automobiles - Volume III	PUB	10.0000	10
SFTWARE-4	Word Processing	SOFTWARE	0.0000	25

Admin Console: Continuum > Events and Orders Report > Order processing reports > Product > Product Reorder List

Desktop: Orders > Generate reports > Product > Product Reorder List, and click Run

Product Sales by Category and Title report

The Product Sales by Category and Title report generates a list of product sales transactions for the date range selected. This report includes only the orders invoiced on the selected date.



Product Sales by Category and Title
Advanced Solutions International, Inc.

Monday, July 29, 2002
Page 1

For the period of 7/29/2002 thru 7/29/2002

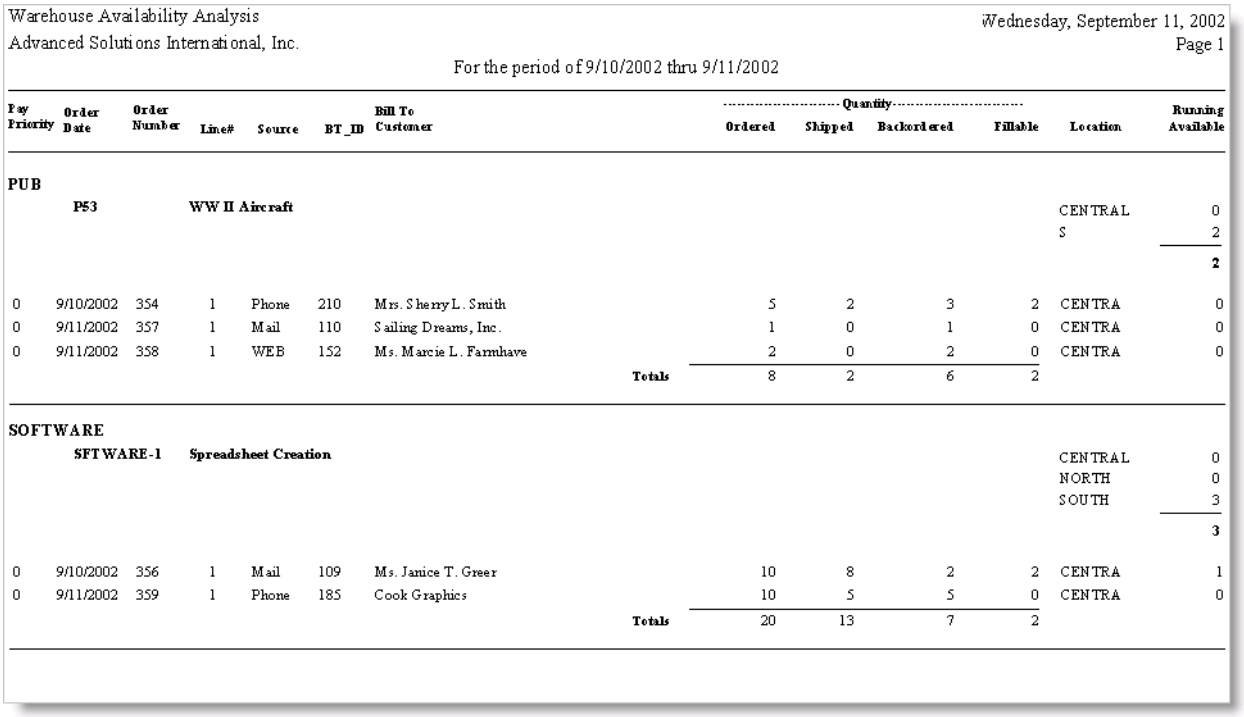
Product Code	Product Title	Quantity	Amount
LABELS			
LABELS	Full Set of Mailing Labels	1	300.00
		1	**300.00**
PUB			
P41	A Planning Guide for Home Businesses	1	23.00
P42	Sailing, A Sport for Young and Old	3	125.00
P43	Power Management	1	30.00
P44	Traveling the United States	4	60.00
		9	**238.00**
VIDEOS			
V101	Video - Creating a New Business	1	39.00
V103	Video - Excelling through Service	1	75.00
		2	**114.00**
Grand Total		**12**	**652.00**

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Product Sales by Category and Title
Desktop: Orders > Generate reports> Product > Product Sales by Category and Title, click Run, select the date range, and click OK

Warehouse Availability Analysis report

The Warehouse Availability Analysis report generates a list of order line items for back-ordered products. Separated by products on backorder, each line item lists specific order information including order number, order date, order priority, and product quantity. The product quantity information lists the number of products Ordered, Shipped, Backordered, and Fillable. If you are using multiple warehouses, the report also lists a product's availability at each warehouse.

If a product's default warehouse does not have sufficient inventory in stock, you can run the report to view a product's availability at other warehouses. If another warehouse has available inventory, you can edit an order to ship a product from a warehouse with sufficient inventory.



Warehouse Availability Analysis
Advanced Solutions International, Inc.
Wednesday, September 11, 2002
Page 1
For the period of 9/10/2002 thru 9/11/2002

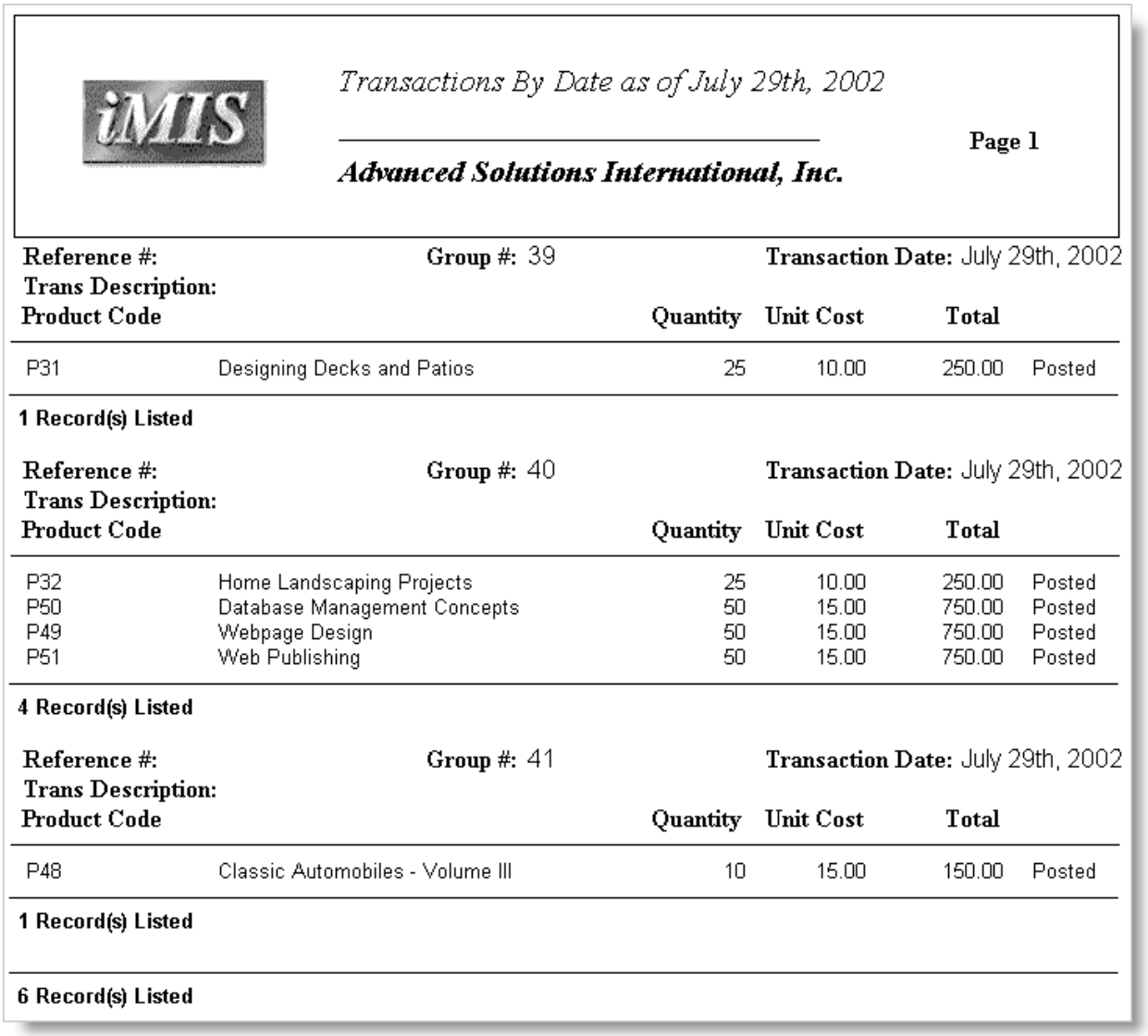
Pay Priority	Order Date	Order Number	Line#	Source	BT_ID	Bill To Customer		Quantity Ordered	Shipped	Backordered	Fillable	Location	Running Available
PUB													
	P53		**WW II Aircraft**									CENTRAL	0
												S	2
													2
0	9/10/2002	354	1	Phone	210	Mrs. Sherry L. Smith		5	2	3	2	CENTRA	0
0	9/11/2002	357	1	Mail	110	Sailing Dreams, Inc.		1	0	1	0	CENTRA	0
0	9/11/2002	358	1	WEB	152	Ms. Marcie L. Farmhave		2	0	2	0	CENTRA	0
							Totals	8	2	6	2		
SOFTWARE													
	SFTWARE-1		**Spreadsheet Creation**									CENTRAL	0
												NORTH	0
												SOUTH	3
													3
0	9/10/2002	356	1	Mail	109	Ms. Janice T. Greer		10	8	2	2	CENTRA	1
0	9/11/2002	359	1	Phone	185	Cook Graphics		10	5	5	0	CENTRA	0
							Totals	20	13	7	2		

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product > Warehouse Availability Analysis

Desktop: Orders > Generate reports > Product > Warehouse Availability Analysis, click Run, select the date range, and click OK

Transactions by Date report

The Transactions by Date report lists all of the posted product inventory transactions for the selected date range.



Transactions By Date as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Reference #: **Group #:** 39 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total	
P31	Designing Decks and Patios	25	10.00	250.00	Posted

1 Record(s) Listed

Reference #: **Group #:** 40 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total	
P32	Home Landscaping Projects	25	10.00	250.00	Posted
P50	Database Management Concepts	50	15.00	750.00	Posted
P49	Webpage Design	50	15.00	750.00	Posted
P51	Web Publishing	50	15.00	750.00	Posted

4 Record(s) Listed

Reference #: **Group #:** 41 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total	
P48	Classic Automobiles - Volume III	10	15.00	150.00	Posted

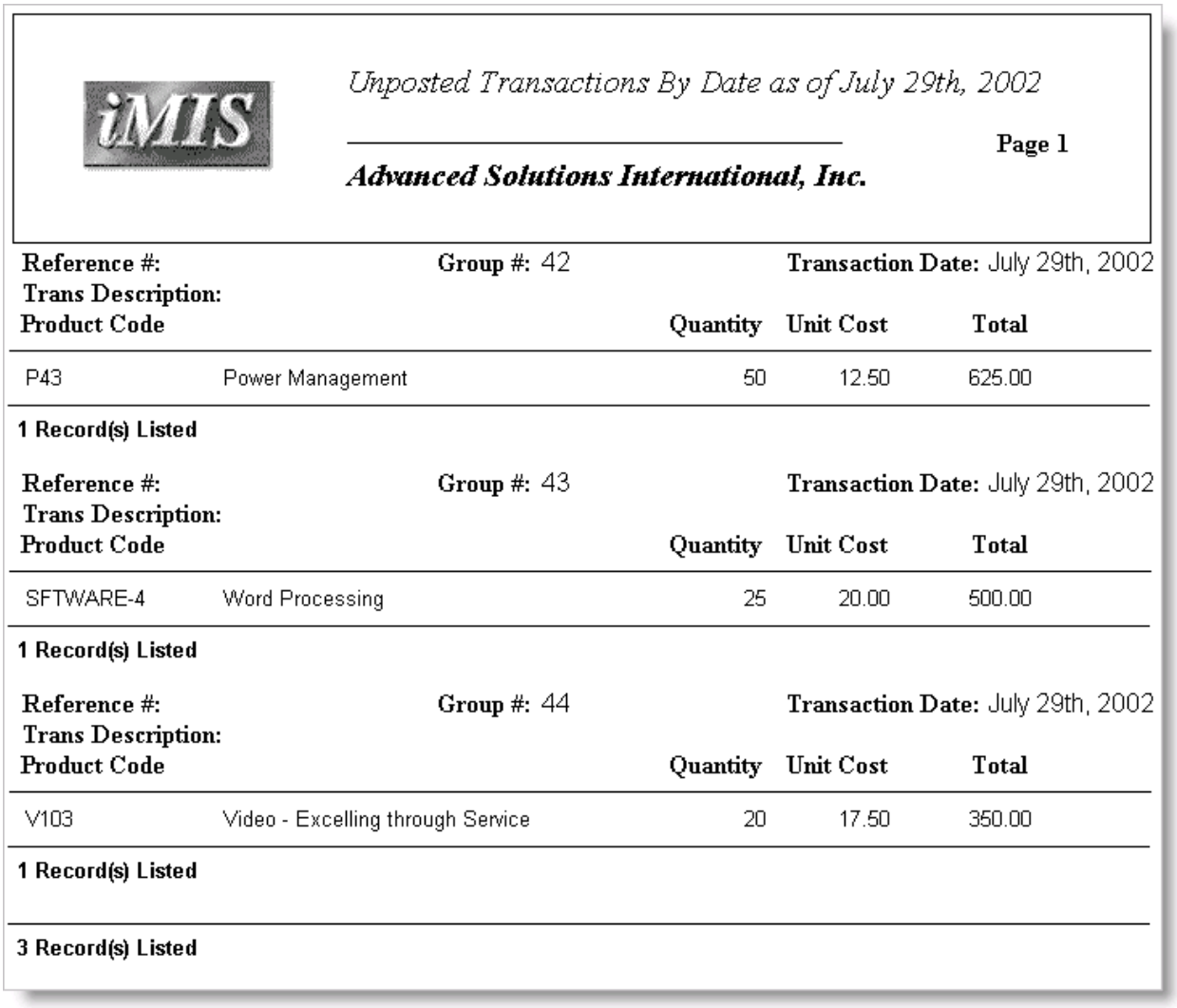
1 Record(s) Listed

6 Record(s) Listed

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product Transactions > Transactions By Date
Desktop: Orders > Generate reports > Product Transactions > Transactions by Date, click Run, select the date range, and click OK

Unposted Transactions by Date report

The Unposted Transactions by Date report lists all of the non-posted product inventory transactions for the selected date range.



Unposted Transactions By Date as of July 29th, 2002

Page 1

Advanced Solutions International, Inc.

Reference #: **Group #:** 42 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total
P43	Power Management	50	12.50	625.00

1 Record(s) Listed

Reference #: **Group #:** 43 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total
SFTWARE-4	Word Processing	25	20.00	500.00

1 Record(s) Listed

Reference #: **Group #:** 44 **Transaction Date:** July 29th, 2002
Trans Description:

Product Code		Quantity	Unit Cost	Total
V103	Video - Excelling through Service	20	17.50	350.00

1 Record(s) Listed

3 Record(s) Listed

Admin Console: Continuum > Events and Orders Reports > Order processing reports > Product Transactions > Unposted Transactions By Date

Desktop: Orders > Generate reports > Product Transactions > Unposted Transactions by Date, click Run, select the date range, and click OK

Reports for Process Manager

The Generate Reports menu is where any and all reports are run for Process Manager. Standard reports are available when you open Process Manager. The output for each report is defined by a query, and each query prompts the user for distinct parameter(s). These queries can be output to MS Word, MS Excel, and Crystal Reports.

- Most text parameters require exact matches
- Date parameters use system short date.
- If a field has a look up value list assigned to it, that value list will be available to you when entering parameters.

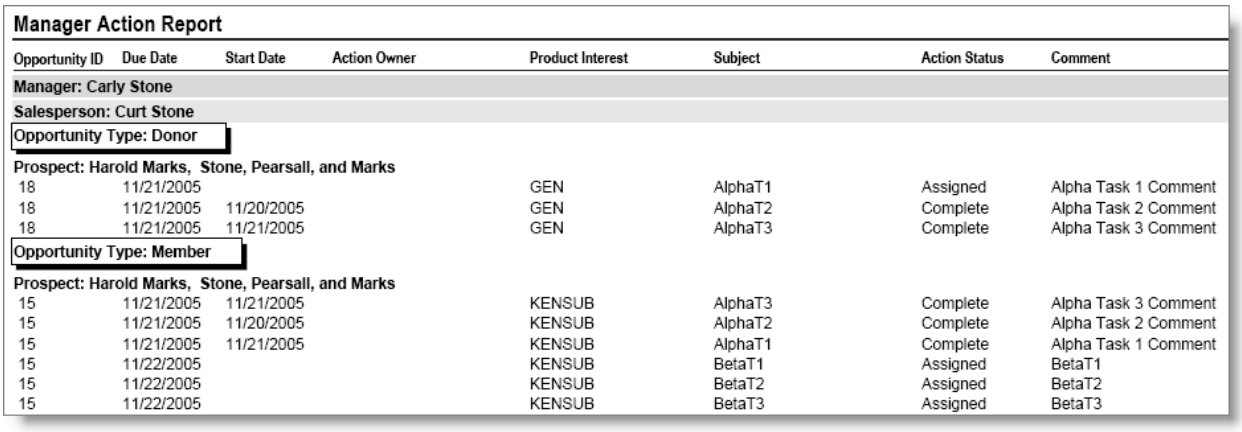
Manager Action Report

The Manager Action Report provides information about current opportunities, their actions and action statuses; they are grouped by manager and salesperson.

Run this report from Opportunity > Generate Reports

When filtering by Opportunity Class, the available filters are:

- OpportunityDonor
- OpportunitySales
- OpportunityMember



Manager Action Report

Opportunity ID	Due Date	Start Date	Action Owner	Product Interest	Subject	Action Status	Comment
Manager: Carly Stone							
Salesperson: Curt Stone							
Opportunity Type: Donor							
Prospect: Harold Marks, Stone, Pearsall, and Marks							
18	11/21/2005			GEN	AlphaT1	Assigned	Alpha Task 1 Comment
18	11/21/2005	11/20/2005		GEN	AlphaT2	Complete	Alpha Task 2 Comment
18	11/21/2005	11/21/2005		GEN	AlphaT3	Complete	Alpha Task 3 Comment
Opportunity Type: Member							
Prospect: Harold Marks, Stone, Pearsall, and Marks							
15	11/21/2005	11/21/2005		KENSUB	AlphaT3	Complete	Alpha Task 3 Comment
15	11/21/2005	11/20/2005		KENSUB	AlphaT2	Complete	Alpha Task 2 Comment
15	11/21/2005	11/21/2005		KENSUB	AlphaT1	Complete	Alpha Task 1 Comment
15	11/22/2005			KENSUB	BetaT1	Assigned	BetaT1
15	11/22/2005			KENSUB	BetaT2	Assigned	BetaT2
15	11/22/2005			KENSUB	BetaT3	Assigned	BetaT3

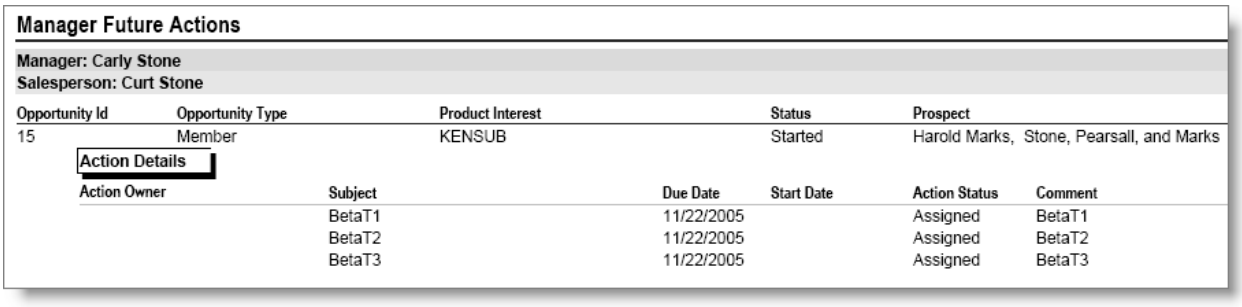
Manager Action Report

Manager Future Actions report

The Manager Future Actions report provides information about opportunities and their actions, action statuses, and their due dates grouped by manager and salesperson.

Run this report from Opportunity > Generate Reports.

> **Note:** Note: If you do not set the date filters, the report will return all actions having a status of Assigned, In Progress, Researching, and On Hold regardless of their actual due dates.



Manager Future Actions

Manager: Carly Stone
Salesperson: Curt Stone

Opportunity Id	Opportunity Type	Product Interest	Status	Prospect
15	Member	KENSUB	Started	Harold Marks, Stone, Pearsall, and Marks

Action Details

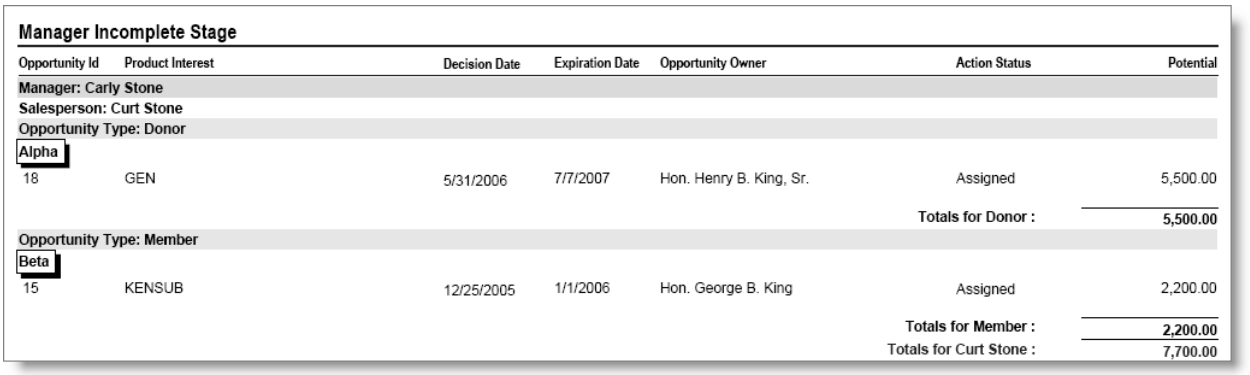
Action Owner	Subject	Due Date	Start Date	Action Status	Comment
	BetaT1	11/22/2005		Assigned	BetaT1
	BetaT2	11/22/2005		Assigned	BetaT2
	BetaT3	11/22/2005		Assigned	BetaT3

Manager Future Actions

Manager Incomplete Stage report

The Manager Incomplete Stage report provides information about opportunities that have incomplete stages grouped by manager, salesperson, and opportunity type.

Run this report from Opportunity > Generate Reports



Manager Incomplete Stage

Opportunity Id	Product Interest	Decision Date	Expiration Date	Opportunity Owner	Action Status	Potential
Manager: Carly Stone						
Salesperson: Curt Stone						
Opportunity Type: Donor						
Alpha						
18	GEN	5/31/2006	7/7/2007	Hon. Henry B. King, Sr.	Assigned	5,500.00
					Totals for Donor :	**5,500.00**
Opportunity Type: Member						
Beta						
15	KENSUB	12/25/2005	1/1/2006	Hon. George B. King	Assigned	2,200.00
					Totals for Member :	**2,200.00**
					Totals for Curt Stone :	**7,700.00**

Manager Incomplete Stage

Manager Opportunity Forecast report

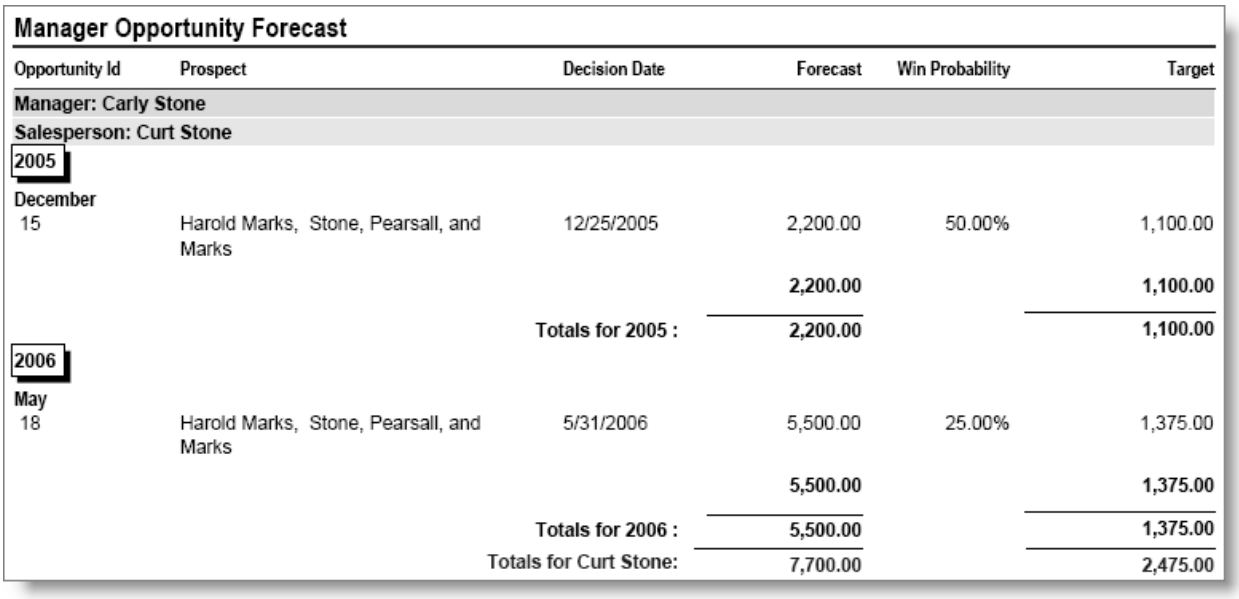
The Manager Opportunity Forecast provides information about opportunities - including decision dates, win probabilities, and targets - grouped by manager and salesperson and sorted by date. Run this report from:

Desktop: Opportunity > Generate Reports

Note: Note:

Enter Win Probability Filter criteria in decimal form. For example, to return all opportunities with a win probability of less than fifty percent, enter 0.5.

If the report contains opportunities that are assigned to more than one salesperson, the Forecast Grand Total will be inaccurate.



Manager Opportunity Forecast

Opportunity Id	Prospect	Decision Date	Forecast	Win Probability	Target
Manager: Carly Stone					
Salesperson: Curt Stone					
2005					
December					
15	Harold Marks, Stone, Pearsall, and Marks	12/25/2005	2,200.00	50.00%	1,100.00
			2,200.00		**1,100.00**
		Totals for 2005 :	**2,200.00**		**1,100.00**
2006					
May					
18	Harold Marks, Stone, Pearsall, and Marks	5/31/2006	5,500.00	25.00%	1,375.00
			5,500.00		**1,375.00**
		Totals for 2006 :	**5,500.00**		**1,375.00**
		Totals for Curt Stone:	**7,700.00**		**2,475.00**

Manager Opportunity Forecast

Manager Overdue Action Report

The Manager Overdue Action Report lists opportunities that have overdue actions and provides details about the actions. The opportunities are grouped by manager and sales-person and sorted by Opportunity ID. Run this report from:

Desktop: Opportunity > Generate Reports

> **Note:** Note: If you do not set the date filters, the report will return all actions having a status of Assigned, In Progress, Researching, and On Hold regardless of their actual due dates.

Manager Overdue Action Report

Manager: Carly Stone
Salesperson: Curt Stone

Opportunity Id	Opportunity Type	Product Interest	Prospect
15	Member	KENSUB	Harold Marks, Stone, Pearsall, and Marks

Action Details

Action Owner	Subject	Action Status	Due Date	Start Date	Comment
	BetaT1	Assigned	11/22/2005		BetaT1
	BetaT2	Assigned	11/22/2005		BetaT2
	BetaT3	Assigned	11/22/2005		BetaT3

Opportunity Id	Opportunity Type	Product Interest	Prospect
18	Donor	GEN	Harold Marks, Stone, Pearsall, and Marks

Action Details

Action Owner	Subject	Action Status	Due Date	Start Date	Comment
	AlphaT1	Assigned	11/21/2005		Alpha Task 1 Comment

Manager Overdue Action Report

Manager Response Analysis report

The Manager Response Analysis lists opportunities and their current stages and statuses. Run this report from:

Desktop: Opportunity > Generate Reports

Manager Response Analysis

Manager: Carly Stone
Salesperson: Curt Stone

15 - M242 (2nd Stage Started)

Prospect	Opportunity Status	Current Stage	Forecast Amount
Harold Marks, Stone, Pearsall, and Marks	Started	Beta	2,200.00

Action Name	Assigned to	Action Status	Start Date	Due Date	Completed Date
AlphaT3	Salesman	Complete	11/21/2005	11/21/2005	11/21/2005
AlphaT2	Salesman	Complete	11/20/2005	11/21/2005	11/21/2005
AlphaT1	Salesman	Complete	11/21/2005	11/21/2005	11/21/2005
BetaT1	Salesman	Assigned		11/22/2005	
BetaT2	Salesman	Assigned		11/22/2005	
BetaT3	Salesman	Assigned		11/22/2005	

18 - D242 (Lost in the First Stage)

Prospect	Opportunity Status	Current Stage	Forecast Amount
Harold Marks, Stone, Pearsall, and Marks	Lost	Alpha	5,500.00

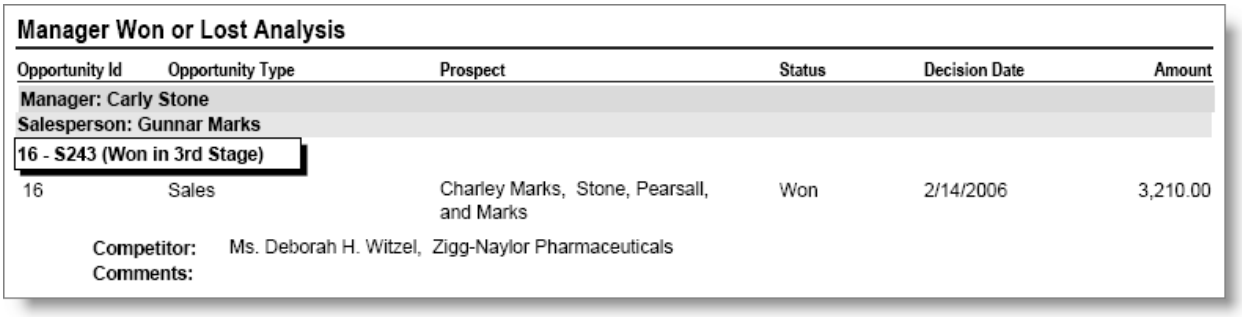
Action Name	Assigned to	Action Status	Start Date	Due Date	Completed Date
AlphaT1	Salesman	Assigned		11/21/2005	
AlphaT2	Salesman	Complete	11/20/2005	11/21/2005	11/21/2005
AlphaT3	Salesman	Complete	11/21/2005	11/21/2005	11/21/2005

Manager Response Analysis

Manager Won or Lost Analysis report

The Manager Won or Lost Analysis report lists, by manager and salesperson, the outcome of opportunities. Run this report from:

Desktop: Opportunity > Generate Reports



Manager Won or Lost Analysis

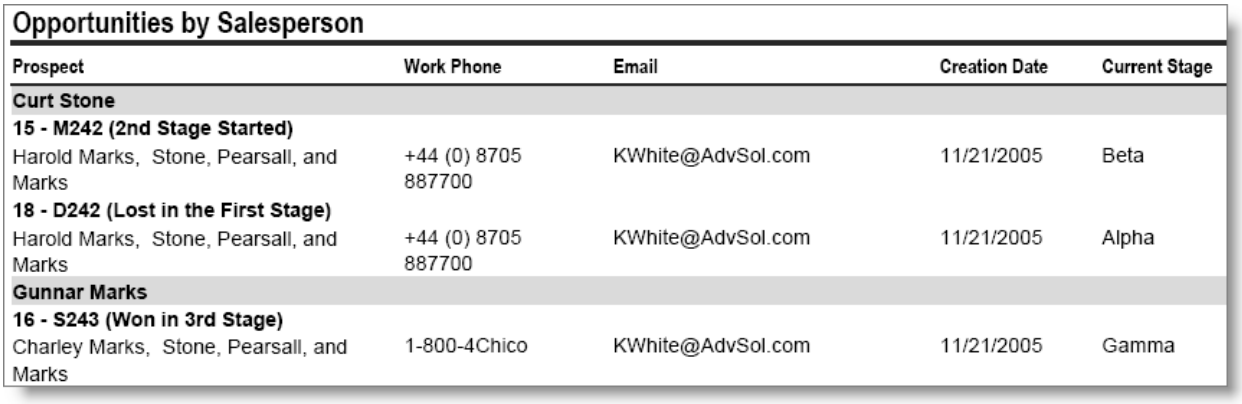
Opportunity Id	Opportunity Type	Prospect	Status	Decision Date	Amount
Manager: Carly Stone					
Salesperson: Gunnar Marks					
16 - S243 (Won in 3rd Stage)					
16	Sales	Charley Marks, Stone, Pearsall, and Marks	Won	2/14/2006	3,210.00
Competitor:	Ms. Deborah H. Witzel, Zigg-Naylor Pharmaceuticals				
Comments:					

Manager Won or Lost Analysis

Opportunities by Salesperson report

The Opportunities by Salesperson report lists, by salesperson, opportunities, and their statuses and, if applicable, their outcomes.

Run this report from: Opportunity > Generate Reports



Opportunities by Salesperson

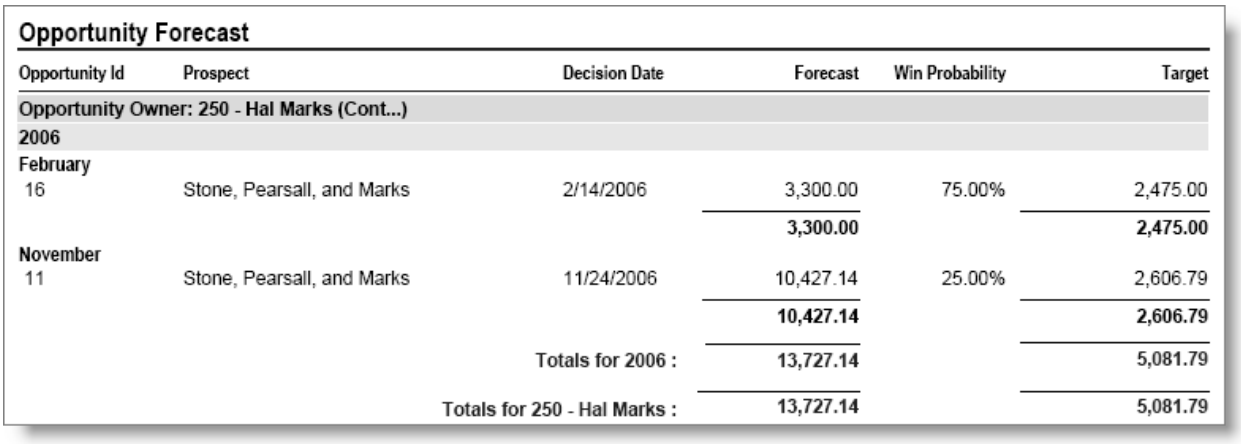
Prospect	Work Phone	Email	Creation Date	Current Stage
Curt Stone				
15 - M242 (2nd Stage Started)				
Harold Marks, Stone, Pearsall, and Marks	+44 (0) 8705 887700	KWhite@AdvSol.com	11/21/2005	Beta
18 - D242 (Lost in the First Stage)				
Harold Marks, Stone, Pearsall, and Marks	+44 (0) 8705 887700	KWhite@AdvSol.com	11/21/2005	Alpha
Gunnar Marks				
16 - S243 (Won in 3rd Stage)				
Charley Marks, Stone, Pearsall, and Marks	1-800-4Chico	KWhite@AdvSol.com	11/21/2005	Gamma

Opportunities by Salesperson

Opportunity Forecast report

The Opportunity Forecast report lists, by opportunity owner, current opportunities, and projected income based on their current win probabilities. Run this report from:

Desktop: Opportunity > Generate Reports



Opportunity Forecast

Opportunity Id	Prospect	Decision Date	Forecast	Win Probability	Target
Opportunity Owner: 250 - Hal Marks (Cont...)					
2006					
February					
16	Stone, Pearsall, and Marks	2/14/2006	3,300.00	75.00%	2,475.00
			3,300.00		**2,475.00**
November					
11	Stone, Pearsall, and Marks	11/24/2006	10,427.14	25.00%	2,606.79
			10,427.14		**2,606.79**
		Totals for 2006 :	**13,727.14**		5,081.79
		Totals for 250 - Hal Marks :	**13,727.14**		5,081.79

Opportunity Forecast

Salesperson Action Report

The Salesperson Action Report lists, by salesperson, the status of assigned actions.

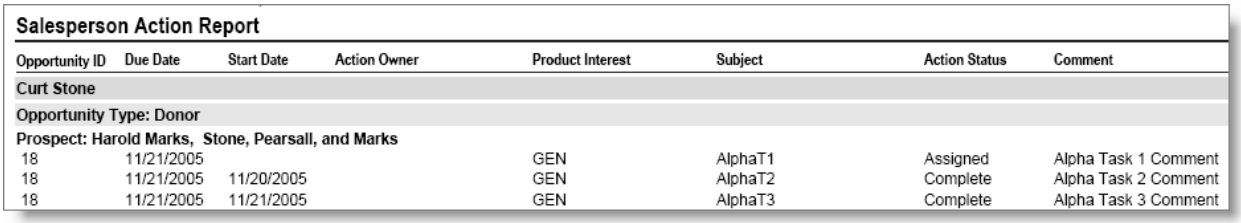
Run this report from: Opportunity > Generate Reports

Note: Note: When filtering by Opportunity Class, the available filters are :

OpportunityDonor

OpportunitySales

OpportunityMember



Salesperson Action Report

Opportunity ID	Due Date	Start Date	Action Owner	Product Interest	Subject	Action Status	Comment
Curt Stone							
Opportunity Type: Donor							
Prospect: Harold Marks, Stone, Pearsall, and Marks							
18	11/21/2005			GEN	AlphaT1	Assigned	Alpha Task 1 Comment
18	11/21/2005	11/20/2005		GEN	AlphaT2	Complete	Alpha Task 2 Comment
18	11/21/2005	11/21/2005		GEN	AlphaT3	Complete	Alpha Task 3 Comment

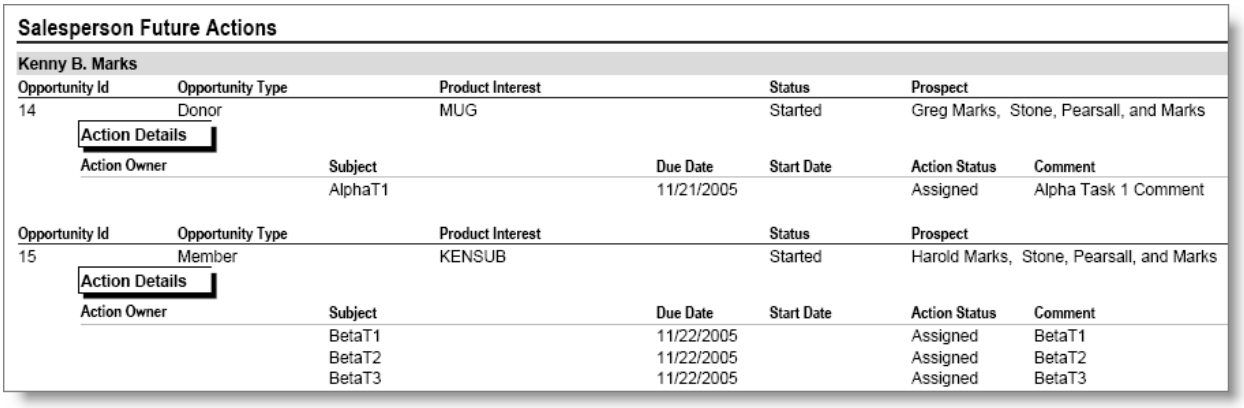
Salesperson Action Report

Salesperson Future Actions report

The Salesperson Future Actions report lists, by salesperson, opportunities and the details of their pending actions. Run this report from:

Desktop: Opportunity > Generate Reports

> **Note:** Note: If you do not set the date filters, the report will return all actions having a status of Assigned, In Progress, Researching, and On Hold regardless of their actual due dates.



Salesperson Future Actions

Kenny B. Marks

Opportunity Id	Opportunity Type	Product Interest	Status	Prospect
14	Donor	MUG	Started	Greg Marks, Stone, Pearsall, and Marks

Action Details

Action Owner	Subject	Due Date	Start Date	Action Status	Comment
	AlphaT1	11/21/2005		Assigned	Alpha Task 1 Comment

Opportunity Id	Opportunity Type	Product Interest	Status	Prospect
15	Member	KENSUB	Started	Harold Marks, Stone, Pearsall, and Marks

Action Details

Action Owner	Subject	Due Date	Start Date	Action Status	Comment
	BetaT1	11/22/2005		Assigned	BetaT1
	BetaT2	11/22/2005		Assigned	BetaT2
	BetaT3	11/22/2005		Assigned	BetaT3

Salesperson Future Actions

Salesperson Opportunity Forecast report

The Salesperson Opportunity Forecast report shows projected totals for each of a salesperson's opportunities based on their current win probabilities. Run this report from:

Desktop: Opportunity > Generate Reports

> **Note:** Note:Enter Win Probability Filter criteria in decimal form. For example, to return all opportunities with a win probability of less than fifty percent, enter 0.5.

If the report contains opportunities that are assigned to more than one salesperson, the Forecast Grand Total will be inaccurate.

Salesperson Opportunity Forecast

Opportunity Id	Prospect	Decision Date	Forecast	Win Probability	Target
Curt Stone					
2005					
December					
15	Harold Marks, Stone, Pearsall, and Marks	12/25/2005	2,200.00	50.00%	1,100.00
			2,200.00		**1,100.00**
		Totals for 2005 :	**2,200.00**		**1,100.00**
2006					
May					
18	Harold Marks, Stone, Pearsall, and Marks	5/31/2006	5,500.00	25.00%	1,375.00
			5,500.00		**1,375.00**
		Totals for 2006 :	**5,500.00**		**1,375.00**
		Totals for Curt Stone :	**7,700.00**		**2,475.00**

Salesperson Opportunity Forecast

Salesperson Overdue Actions report

The Salesperson Overdue Actions report lists, by salesperson, actions that have not been marked complete by their due date.

Run this report from Opportunity > Generate Reports

> **Note:** Note: If you do not set the date filters, the report will return all actions having a status of Assigned, In Progress, Researching, and On Hold regardless of their actual due dates.

Salesperson Overdue Actions

Curt Stone

Opportunity Id	Opportunity Type	Product Interest	Prospect
15	Member	KENSUB	Harold Marks, Stone, Pearsall, and Marks

Action Details

Action Owner	Subject	Action Status	Due Date	Start Date	Comment
	BetaT1	Assigned	11/22/2005		BetaT1
	BetaT2	Assigned	11/22/2005		BetaT2
	BetaT3	Assigned	11/22/2005		BetaT3

Salesperson Overdue Actions

Specifications

Report Title: Action Report

Report Name: Action.rpt

Description: Tracks opportunity actions specific to Action Owners.

Driver Business Object: TaskItem

Associated Query/Type: Action Report Query (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Opportunity Type, Action Status

Sorted By: Company, Due Date

Report Fields: Opportunity ID, Start Date, Product Interest, Subject, Comment, Due Date, Status, Action Owner

Report Title: Action Report by Date

Report Name: ActionByDate.rpt

Description: Tracks opportunity actions specific to the Action Owner for a selected date range.

Driver Business Object: TaskItem

Associated Query/Type: Action Report by Date Query (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Status, Begin Date, End Date, Type

Report Fields: Opportunity ID, Start Date, Product Interest, Subject, Comment, Due Date, Status, Action Owner

Report Title: Incomplete Stage Report

Report Name: IncompleteStage.rpt

Description: Tracks incomplete opportunities.

Driver Business Object: Opportunity

Associated Query/Type: Incomplete Stage Query (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Crystal Filters/Parameters: Action Status <> Complete, Expiration Date >= Date parameter

Sorted By: Type, Stage

Report Fields: Opportunity ID, Product Interest, Decision Date, Owner, Potential, Type, Stage

Report Title: Opportunities with Future Actions
Report Name: FutureActions.rpt

Description: Tracks opportunities with open actions in the future that are specific to Action Owners.

Driver Business Object: Opportunity

Associated Query/Type: Future Actions Query (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Action Owner = Task Assigned to, Type; Begin Date >= Due Date; End Date <= Due Date

Sorted By: Due Date, Company, Start Date

Report Fields: Opportunity ID, Start Date, Product Interest, Subject, Comment, Due Date, Action Status, Action Owner

Report Title: Opportunities with Overdue Actions
Report Name: OverdueActions.rpt

Description: Tracks opportunities with actions overdue as of today's data that are specific to Action Owners. OverDue = Due Date is less than the current date and Action Status is not complete.

Driver Business Object: Opportunity

Associated Query/Type: Over Due Actions Report (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Action Owner, Action Status, OverDue Date = Current Date, Opportunity Type

Sorted By: Company, Due Date, Start Date

Report Fields: Opportunity ID, Start Date, Product Interest, Subject, Comment, Due Date, Action Status, Action Owner

Report Title: Opportunity Forecast Donor

Report Name: OpportunityForecastDonor.rpt

Description: Tracks opportunities with a high probability of closing. This report is used to track opportunities with upcoming decision dates.

Driver Business Object: Opportunity Donor

Associated Query/Type: Opportunity Forecast for Donor (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Opportunity Status <> Closed, Probability < 100 Potential > 0, Begin Date >= DecisionDate, End Date <= Decision Date

Sorted By : OpportunityOwner, Year, Month, Company, Decision Date

Report Fields : Opportunity ID, Target, Forecast, Win Probability, Decision Date

Report Title: Opportunity Forecast Member

Report Name: OpportunityForecastMember.rpt

Description: Tracks opportunities with a high probability of closing. This report is used to track opportunities with upcoming decision dates.

Driver Business Object: OpportunityMember

Associated Query/Type: Opportunity Forecast for Member (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Opportunity Status <> Closed, Probability < 100 Potential > 0, Begin Date >= DecisionDate, End Date <= Decision Date

Sorted By : OpportunityOwner, Year, Month, Company, Decision Date

Report Fields : Opportunity ID, Target, Forecast, Win Probability, Decision Date

Report Title: Opportunity Forecast Sales

Report Name: OpportunityForecastSales.rpt

Description: Tracks opportunities with a high probability of closing. This report is used to track opportunities with upcoming decision dates.

Driver Business Object: OpportunitySales

Associated Query/Type: Opportunity Forecast for Sales (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Opportunity Status <> Closed, Probability < 100 Potential > 0, Begin Date >= DecisionDate, End Date <= Decision Date

Sorted By : OpportunityOwner, Year, Month, Company, Decision Date

Report Fields : Opportunity ID, Target, Forecast, Win Probability, Decision Date

Report Title: Response Analysis
Report Name: Response.rpt

Description: Tracks responses to the actions specific to Action Owners.

Driver Business Object: Opportunity

Associated Query/Type: Response Analysis Query (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

Query Filters/Parameters: Opportunity Status <> Completed, Begin Date >= Start Date, End Date <= Start Date

Sorted By: Campaign, Appeal, Solicitation

Report Fields: Opportunity ID, Company, Opportunity Type, Action Status, Start Date, Response Media, Forecast Amount

Report Title: Won or Lost Opportunity Analysis
Report Name: WonOrLostOpportunity.rpt

Description: Tracks won or lost opportunities.

Driver Business Object: Opportunity

Associated Query/Type: Won or Lost Opportunities (Select at Runtime); use the default, select a query from the CORE (select OpportunityManagement> DefaultSystem> Queries> OpportunityList), or create a custom query. If you create a custom query, you must add the Opportunity business object as one of the sources.

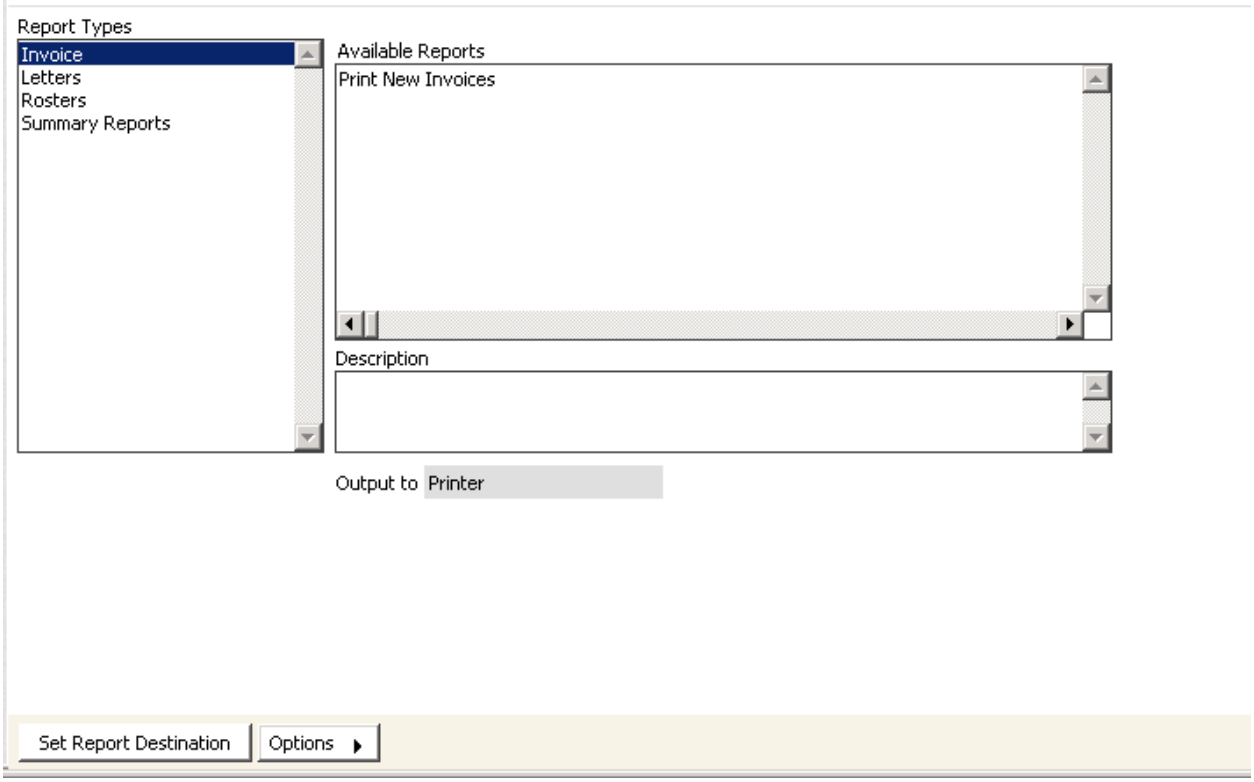
Query Filters/Parameters: Opportunities Status (must select Won or Lost; any other selection would result in an empty report)

Sorted By: OpportunityOwner, Company

Report Fields: Opportunity ID, Sales Representative, Competitors, Comments, Forecast Amount, Decision Date

Reports for Referrals

Referral reports window

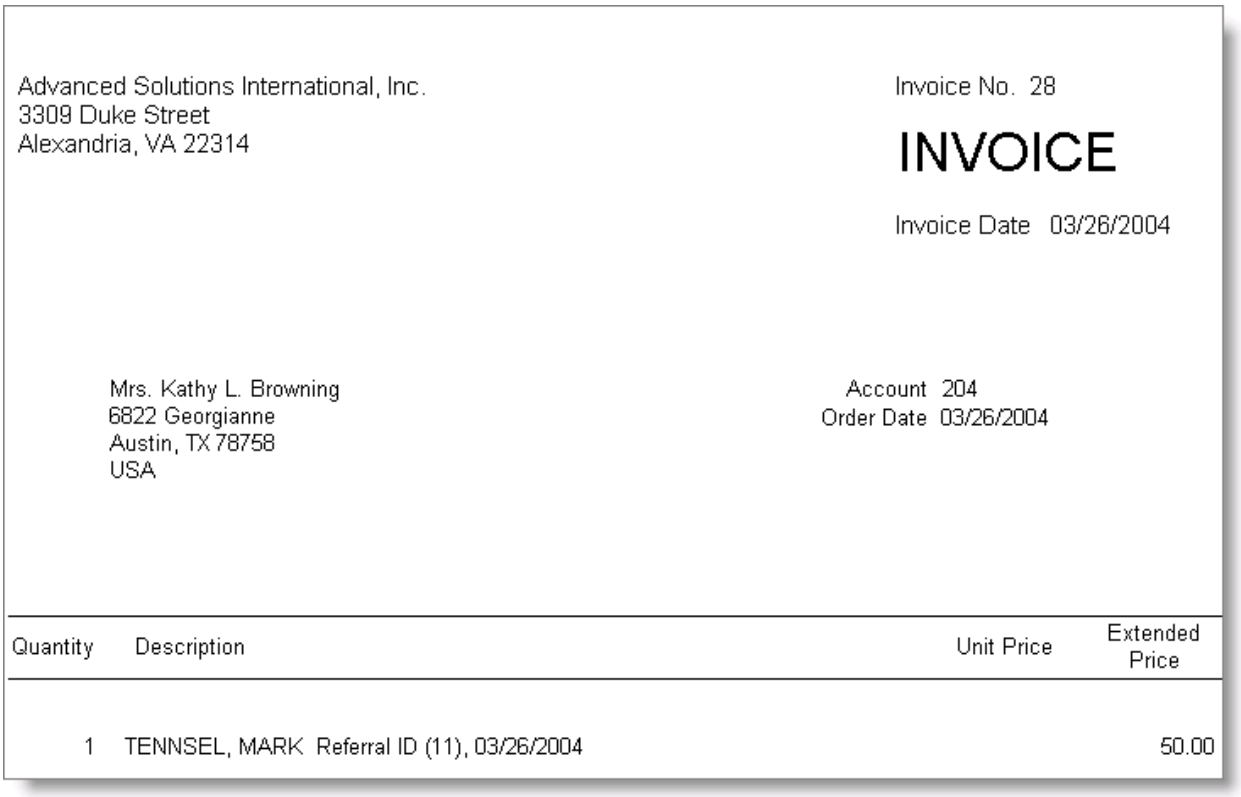


Admin Console: Continuum > Membership Reports > Referral reports
Desktop: Referrals > Generate reports

When you select Membership Reports, the standard iMIS report window displays. The window offers you a variety of printed output, including Rosters, Statistics, and Activity reports. The window is identical to that of every iMIS module. It gives you access to many categories of reports and options, from which you select specific formats and output. It also lets you choose the printer with Set Report Destination or other output device, and you can often vary the sort order and control the inclusion of providers and records, as well as other report-related items.

Print Invoice report

The Print Invoice report prints an invoice listing additional referral fees charged to clients.



Advanced Solutions International, Inc.
3309 Duke Street
Alexandria, VA 22314

Invoice No. 28

INVOICE

Invoice Date 03/26/2004

Mrs. Kathy L. Browning
6822 Georgianne
Austin, TX 78758
USA

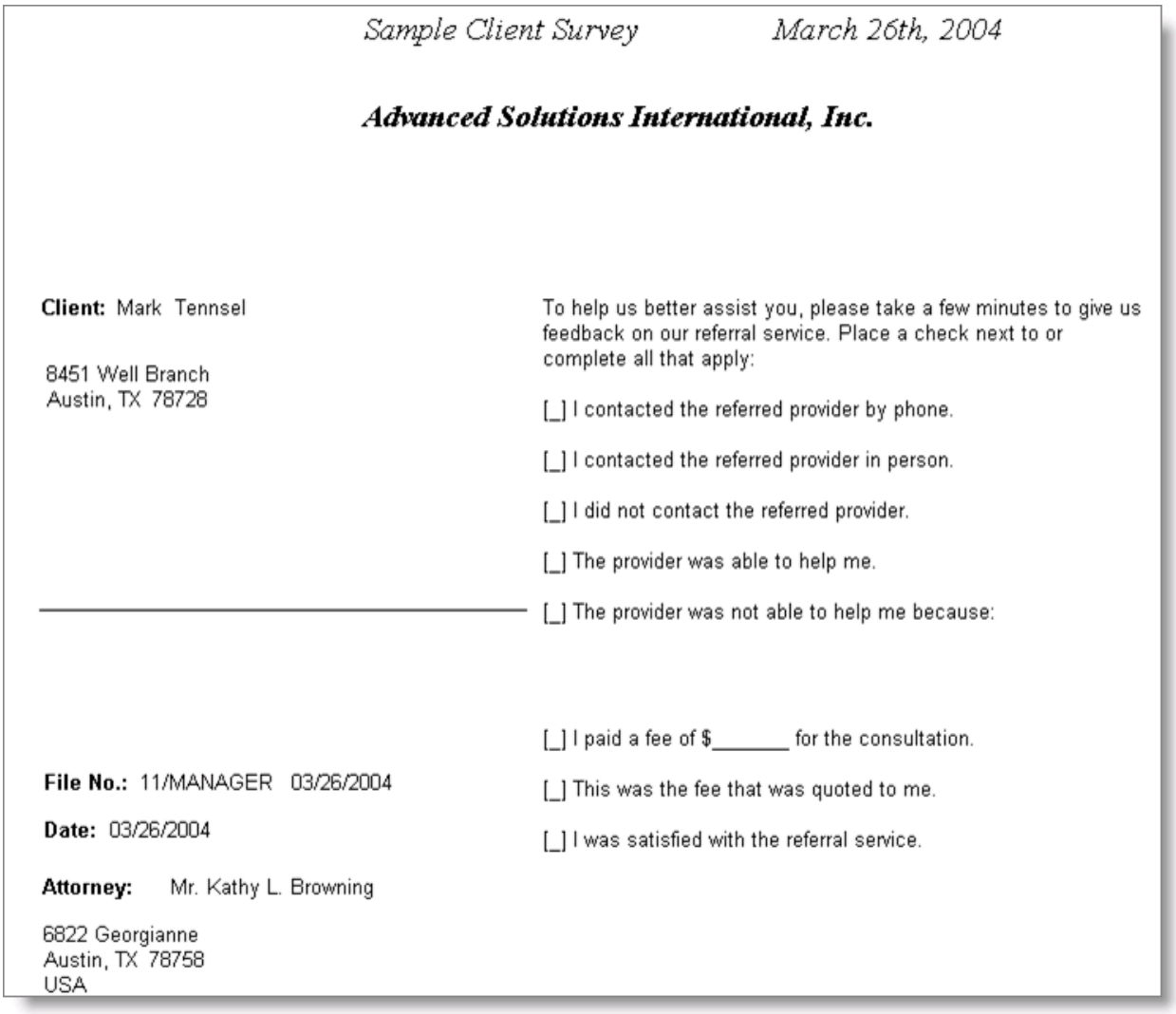
Account 204
Order Date 03/26/2004

Quantity	Description	Unit Price	Extended Price
1	TENNSEL, MARK Referral ID (11), 03/26/2004		50.00

Print Invoice report

Survey Reports

Client and provider survey reports are available to allow you to obtain and track feedback associated with the referral.



Sample Client Survey *March 26th, 2004*

Advanced Solutions International, Inc.

Client: Mark Tennsel

8451 Well Branch
Austin, TX 78728

To help us better assist you, please take a few minutes to give us feedback on our referral service. Place a check next to or complete all that apply:

[_] I contacted the referred provider by phone.

[_] I contacted the referred provider in person.

[_] I did not contact the referred provider.

[_] The provider was able to help me.

[_] The provider was not able to help me because:

[_] I paid a fee of $_____ for the consultation.

File No.: 11/MANAGER 03/26/2004

Date: 03/26/2004

[_] This was the fee that was quoted to me.

[_] I was satisfied with the referral service.

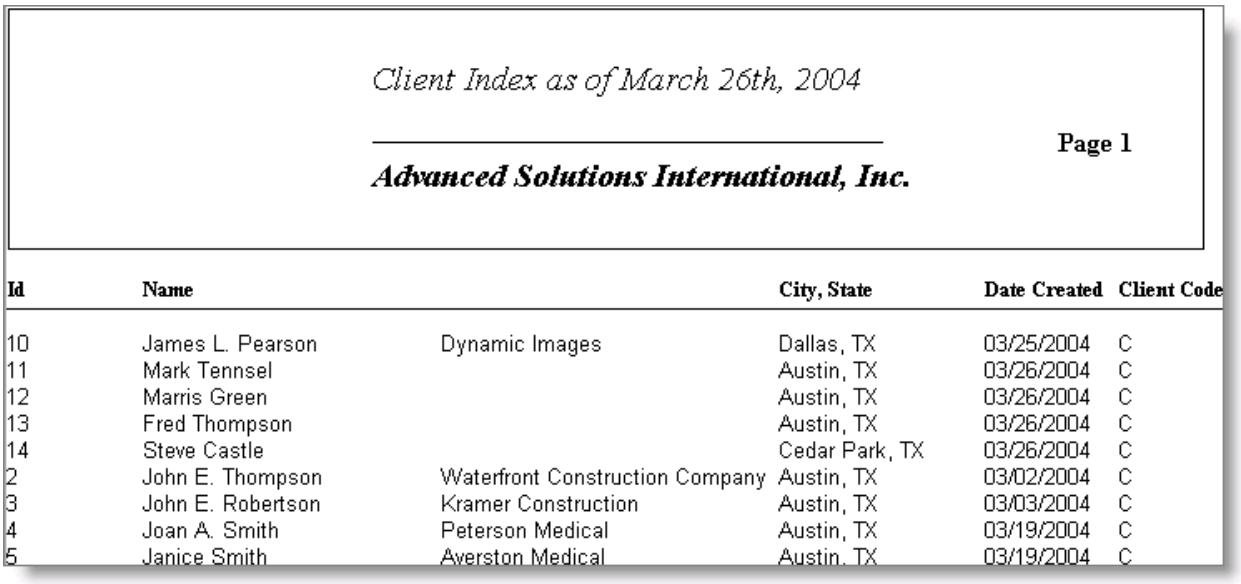
Attorney: Mr. Kathy L. Browning

6822 Georgianne
Austin, TX 78758
USA

Client Survey report

Roster Reports

Roster reports are available to allow you to print a list of providers or clients.



Client Index as of March 26th, 2004

Page 1

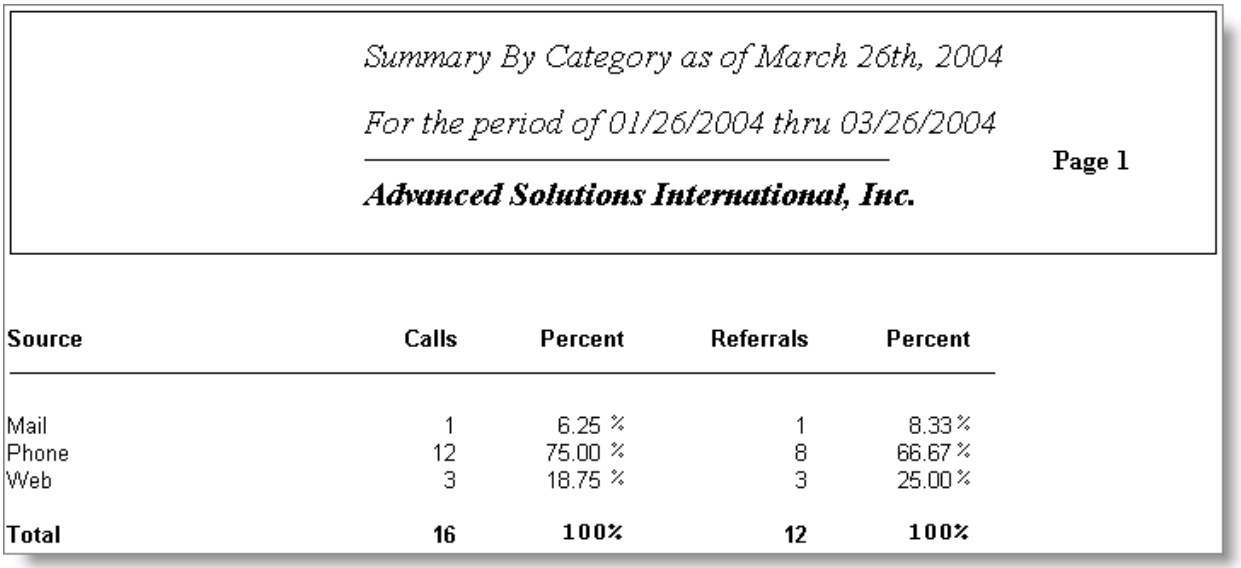
Advanced Solutions International, Inc.

Id	Name		City, State	Date Created	Client Code
10	James L. Pearson	Dynamic Images	Dallas, TX	03/25/2004	C
11	Mark Tennsel		Austin, TX	03/26/2004	C
12	Marris Green		Austin, TX	03/26/2004	C
13	Fred Thompson		Austin, TX	03/26/2004	C
14	Steve Castle		Cedar Park, TX	03/26/2004	C
2	John E. Thompson	Waterfront Construction Company	Austin, TX	03/02/2004	C
3	John E. Robertson	Kramer Construction	Austin, TX	03/03/2004	C
4	Joan A. Smith	Peterson Medical	Austin, TX	03/19/2004	C
5	Janice Smith	Averston Medical	Austin, TX	03/19/2004	C

Client Index report

Summary Reports

Several summary reports are available, including a report that allows you to summarize referrals by Source, Status, Reason or Type.



Summary By Category as of March 26th, 2004

For the period of 01/26/2004 thru 03/26/2004

Page 1

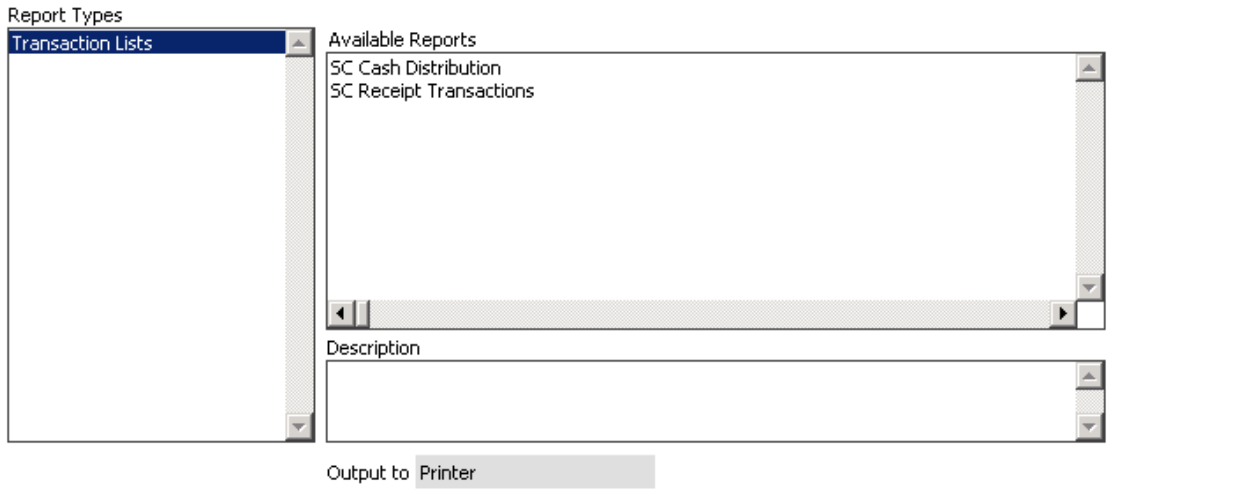
Advanced Solutions International, Inc.

Source	Calls	Percent	Referrals	Percent
Mail	1	6.25 %	1	8.33 %
Phone	12	75.00 %	8	66.67 %
Web	3	18.75 %	3	25.00 %
Total	**16**	**100%**	**12**	**100%**

Summary By Category report

Reports for Customer Service

Customer service reports window



Admin Console: Continuum > Commerce and Customer Service Reports > Customer service reports
Desktop: Service Central > Generate reports

You can generate two reports through Customer service reports by utilizing Service Central: SC Cash Distribution and SC Receipt.

Transaction. The SC Cash Distribution report is a monthly transaction detail report, sorted by income and account number. The SC Receipt Transaction report is a daily receipts detail report showing all payment details, including a recap by income account.

Printing Service Central Reports

You can print Service Central reports in the same manner as other iMIS modules.

To print Service Central reports

1. From Customer service reports, select a report.

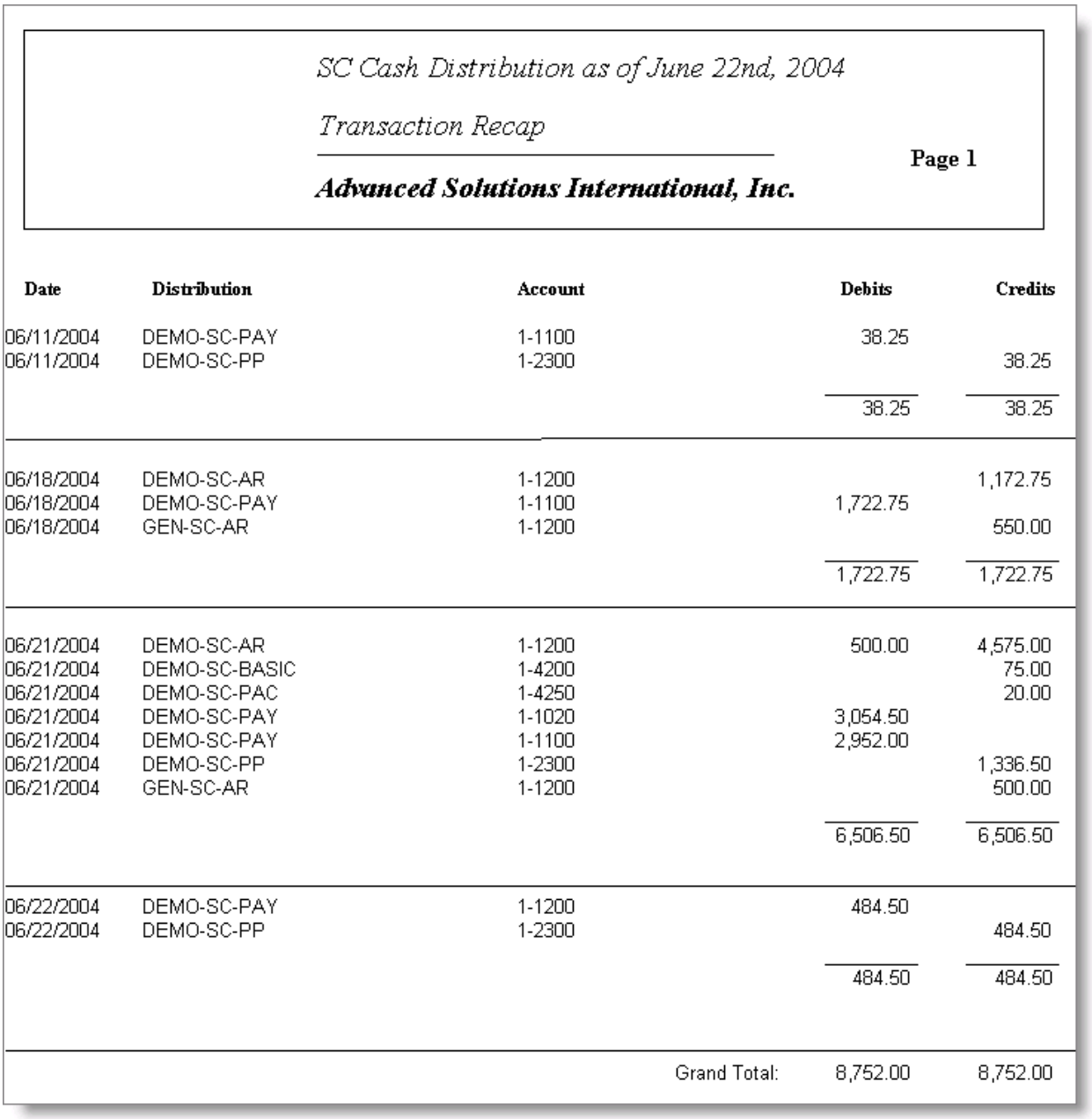
2. Click the Set Report Destination button and select where you want the view the output.
3. Click Run.

   The Date Range window opens.
4. Enter a Begin Date and End Date for the report.

   Note: Enter a date range that is not greater than 30 days. If you enter a date range that exceeds 30 days.
5. Click OK to run the report.

Sample Service Central Reports

SC Cash Distribution - Transaction Recap report



SC Cash Distribution as of June 22nd, 2004

Transaction Recap

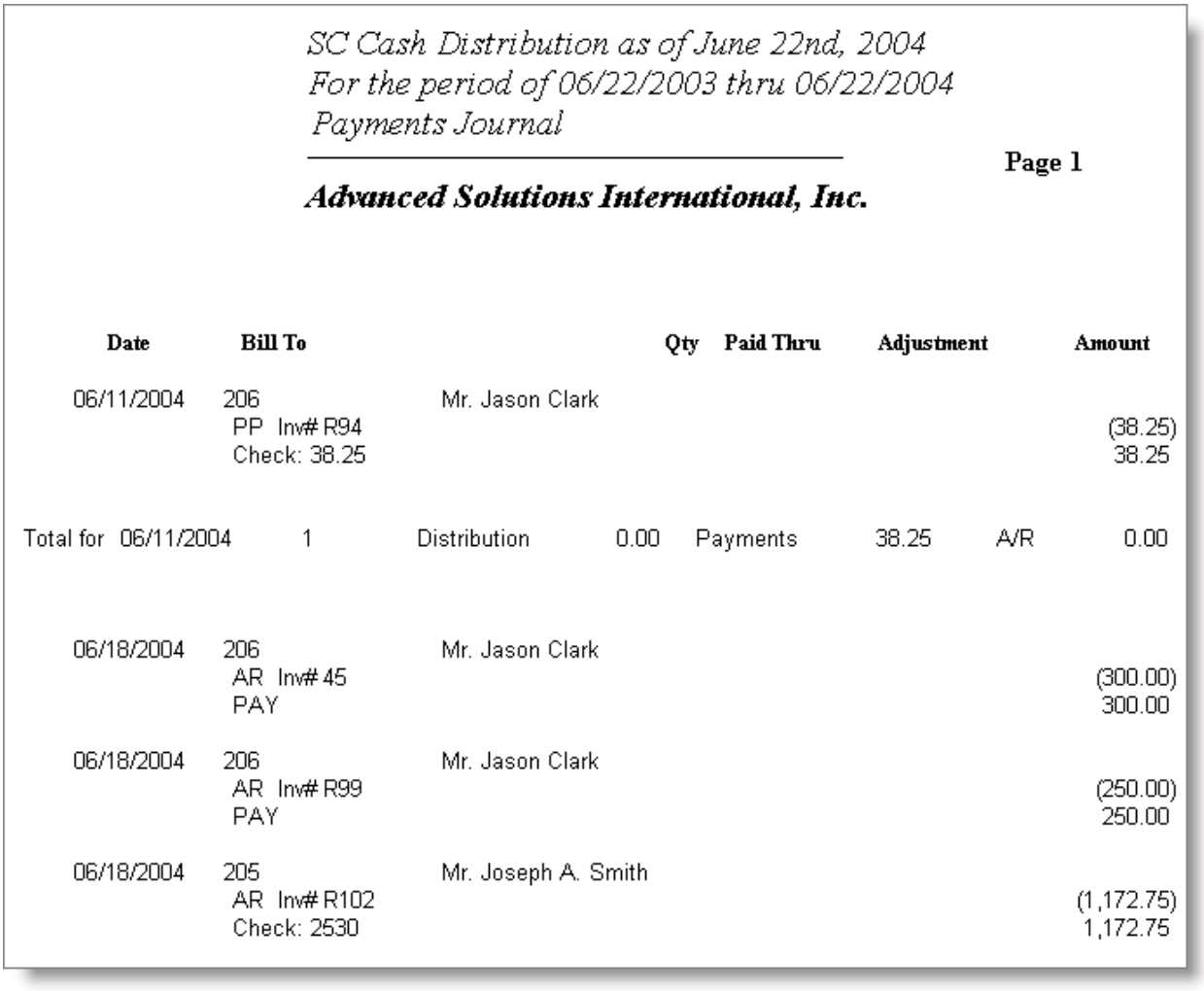
Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
06/11/2004	DEMO-SC-PAY	1-1100	38.25	
06/11/2004	DEMO-SC-PP	1-2300		38.25
			38.25	38.25
06/18/2004	DEMO-SC-AR	1-1200		1,172.75
06/18/2004	DEMO-SC-PAY	1-1100	1,722.75	
06/18/2004	GEN-SC-AR	1-1200		550.00
			1,722.75	1,722.75
06/21/2004	DEMO-SC-AR	1-1200	500.00	4,575.00
06/21/2004	DEMO-SC-BASIC	1-4200		75.00
06/21/2004	DEMO-SC-PAC	1-4250		20.00
06/21/2004	DEMO-SC-PAY	1-1020	3,054.50	
06/21/2004	DEMO-SC-PAY	1-1100	2,952.00	
06/21/2004	DEMO-SC-PP	1-2300		1,336.50
06/21/2004	GEN-SC-AR	1-1200		500.00
			6,506.50	6,506.50
06/22/2004	DEMO-SC-PAY	1-1200	484.50	
06/22/2004	DEMO-SC-PP	1-2300		484.50
			484.50	484.50
		Grand Total:	8,752.00	8,752.00

SC Cash Distribution - Transaction Recap

SC Cash Distribution - Payments Journal report



SC Cash Distribution as of June 22nd, 2004
For the period of 06/22/2003 thru 06/22/2004
Payments Journal

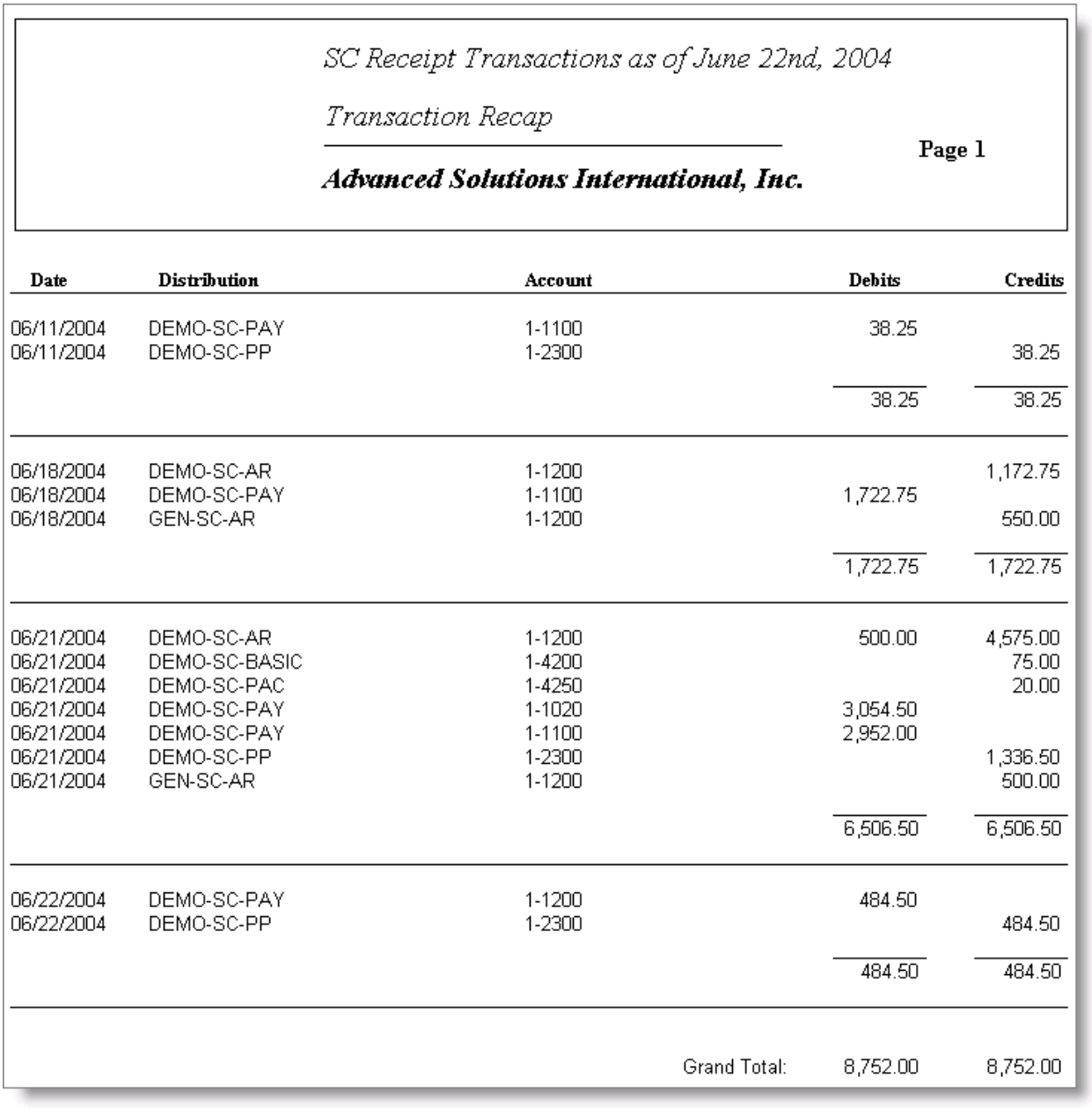
Page 1

Advanced Solutions International, Inc.

Date	Bill To		Qty	Paid Thru	Adjustment		Amount
06/11/2004	206	Mr. Jason Clark					
	PP Inv# R94						(38.25)
	Check: 38.25						38.25
Total for 06/11/2004	1	Distribution	0.00	Payments	38.25	A/R	0.00
06/18/2004	206	Mr. Jason Clark					
	AR Inv# 45						(300.00)
	PAY						300.00
06/18/2004	206	Mr. Jason Clark					
	AR Inv# R99						(250.00)
	PAY						250.00
06/18/2004	205	Mr. Joseph A. Smith					
	AR Inv# R102						(1,172.75)
	Check: 2530						1,172.75

SC Cash Distribution - Payment Journal

SC Receipt Transactions - Transaction Recap report



SC Receipt Transactions as of June 22nd, 2004

Transaction Recap

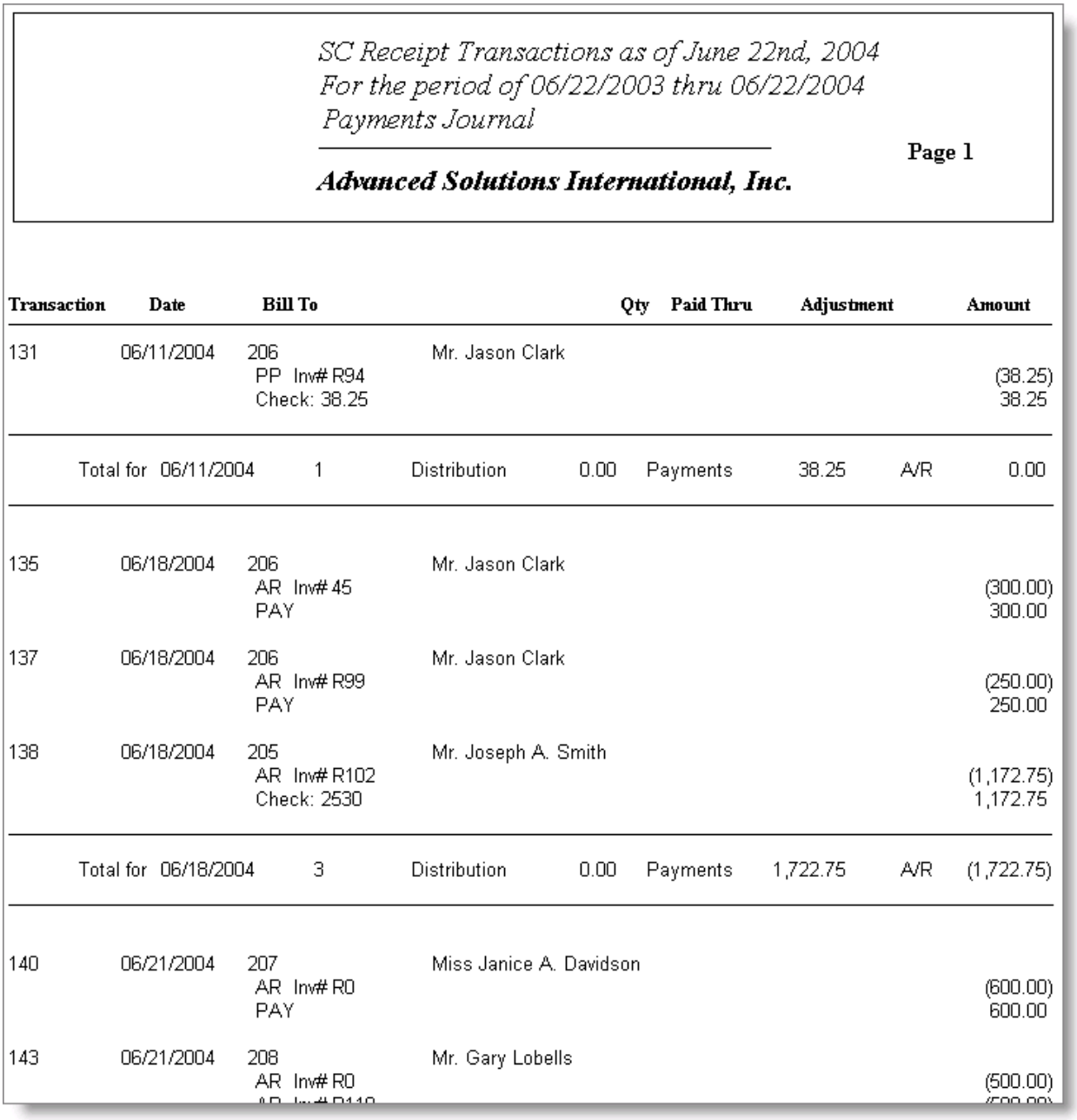
Page 1

Advanced Solutions International, Inc.

Date	Distribution	Account	Debits	Credits
06/11/2004	DEMO-SC-PAY	1-1100	38.25	
06/11/2004	DEMO-SC-PP	1-2300		38.25
			38.25	38.25
06/18/2004	DEMO-SC-AR	1-1200		1,172.75
06/18/2004	DEMO-SC-PAY	1-1100	1,722.75	
06/18/2004	GEN-SC-AR	1-1200		550.00
			1,722.75	1,722.75
06/21/2004	DEMO-SC-AR	1-1200	500.00	4,575.00
06/21/2004	DEMO-SC-BASIC	1-4200		75.00
06/21/2004	DEMO-SC-PAC	1-4250		20.00
06/21/2004	DEMO-SC-PAY	1-1020	3,054.50	
06/21/2004	DEMO-SC-PAY	1-1100	2,952.00	
06/21/2004	DEMO-SC-PP	1-2300		1,336.50
06/21/2004	GEN-SC-AR	1-1200		500.00
			6,506.50	6,506.50
06/22/2004	DEMO-SC-PAY	1-1200	484.50	
06/22/2004	DEMO-SC-PP	1-2300		484.50
			484.50	484.50
		Grand Total:	8,752.00	8,752.00

SC Receipt Transactions - Transaction Recap

SC Receipt Transactions - Payments Journal report



SC Receipt Transactions as of June 22nd, 2004
For the period of 06/22/2003 thru 06/22/2004
Payments Journal

Page 1

Advanced Solutions International, Inc.

Transaction	Date	Bill To		Qty	Paid Thru	Adjustment		Amount
131	06/11/2004	206	Mr. Jason Clark					
		PP Inv# R94						(38.25)
		Check: 38.25						38.25
	Total for 06/11/2004	1	Distribution	0.00	Payments	38.25	A/R	0.00
135	06/18/2004	206	Mr. Jason Clark					
		AR Inv# 45						(300.00)
		PAY						300.00
137	06/18/2004	206	Mr. Jason Clark					
		AR Inv# R99						(250.00)
		PAY						250.00
138	06/18/2004	205	Mr. Joseph A. Smith					
		AR Inv# R102						(1,172.75)
		Check: 2530						1,172.75
	Total for 06/18/2004	3	Distribution	0.00	Payments	1,722.75	A/R	(1,722.75)
140	06/21/2004	207	Miss Janice A. Davidson					
		AR Inv# R0						(600.00)
		PAY						600.00
143	06/21/2004	208	Mr. Gary Lobells					
		AR Inv# R0						(500.00)

Receipt Transaction - Payments Journal

Transaction Summary by Batch

The Transaction Summary by Batch report shows all service (charge) and payment transactions for the current batch. This report is available only if Batch Control is enabled.

Run this report from: Service Central > Generate Reports > Transaction by Batch > Transaction Summary by Batch

Transaction Summary by Date

The Transaction Summary by Date report shows all service (charge) and payment transactions for the current day. This report is available only if Batch Control is not enabled.

Run this report from: Service Central > Generate Reports > Transaction by Batch > Transaction Summary by Batch

Service Central

Service Central Overview

Service Central allows you to offer one-stop shopping to your customers. This module provides a central location for processing event registrations, orders, fundraising gifts and pledges, and payment(s). In addition, Service Central provides your organization with the ability to sell products and services from various areas and apply payment for the products or service with a single check or credit card transaction.

Service Central Capabilities

The Service Central module has many unique and useful capabilities. The following list is an overview of Service Central module capabilities:

- Apply events and orders payments using a single point of entry
- Pay and view cash dues and subscription list payments for both the company and the individual
- Apply fundraising gift/pledge payments
- Authorize or validate credit card payments
- Apply payment for any open balance for any module within iMIS
- Create a Transaction Summary report for customers of dues/subscriptions, events, fundraising gifts/pledges and orders activity
- Print and distribute a Transaction Summary report of all Service Central transactions using e-mail or regular mail
- Calculate and display a Total Amount due as you enter items on the Process customer requests window
- Option to Auto-apply payment to the oldest items or to apply payment to individual outstanding items in the Payment Entry window by selecting or deselecting the line item

- Display Fundraising items with a Balance Due on the Payment window
- Option to search by customer ID, date, or transaction number from the Payment Entry window
- Easy access to all iMIS modules
- Display All, Outstanding, and Current batch transactions
- Display All, Outstanding, and Today non-batch transactions

Module Restrictions

- Open credit balance line items and Fundraising items are not selected for Auto-apply on the Payment Entry window when you open it from the Process customer requests window.
- Do not apply overpayments to Fundraising items, which results in a credit balance. Instead, apply overpayments to the Pre-Pay line.
- Separate Posting Required, an AR/Cash function is not compatible with Service Central.
- Accrual Dues Billing is not compatible with Service Central.
- Do not create credit and debit memos using the Service Central module; create credit and debit Memos only in the AR/Cash module.

  Note: Processing customer credit card authorization and batch control transactions in Service Central is optional. These features must be set up by your administrator. See Credit Card Authorization.

  Navigation for Service Central

  To gain access to the Service Central task list, select Service Central from the navigation bar.

- Process customer requests - Select this task list item to open the Process customer request window that interfaces with other iMIS modules to allow you to process customer requests.

- Process billing - Select this task list item to open the Process billing window where you can create a dues billing and place a subscription for an individual or a company customer.
- Register a customer - Select this task list item to open the Register a customer window where you can enter registration information for a customer.
- Enter and edit gifts - Select this task list item to open the Enter and edit gifts window where you can enter and edit gifts and pledges.
- Process sales transactions - Select this task list item to open the Process sales transactions window where you can process sales transactions that are tracked through AR/Cash.
- Process orders - Select this task list item to open the Process orders window where you can process orders.
- Enter and edit payments - Select this task list item to open the Enter and edit payments window where you can enter payments received from customers. By default, the Pay Amount field is not auto-populated and the Pay option is not auto-selected.
- Generate reports - Select this task list item to open the Service Central Generate reports window where you can generate a report of detailed daily receipts or a monthly cash distribution report.

Service Central Windows

This section contains detailed information about Service Central windows and a brief description of other iMIS module windows that interface with Service Central.

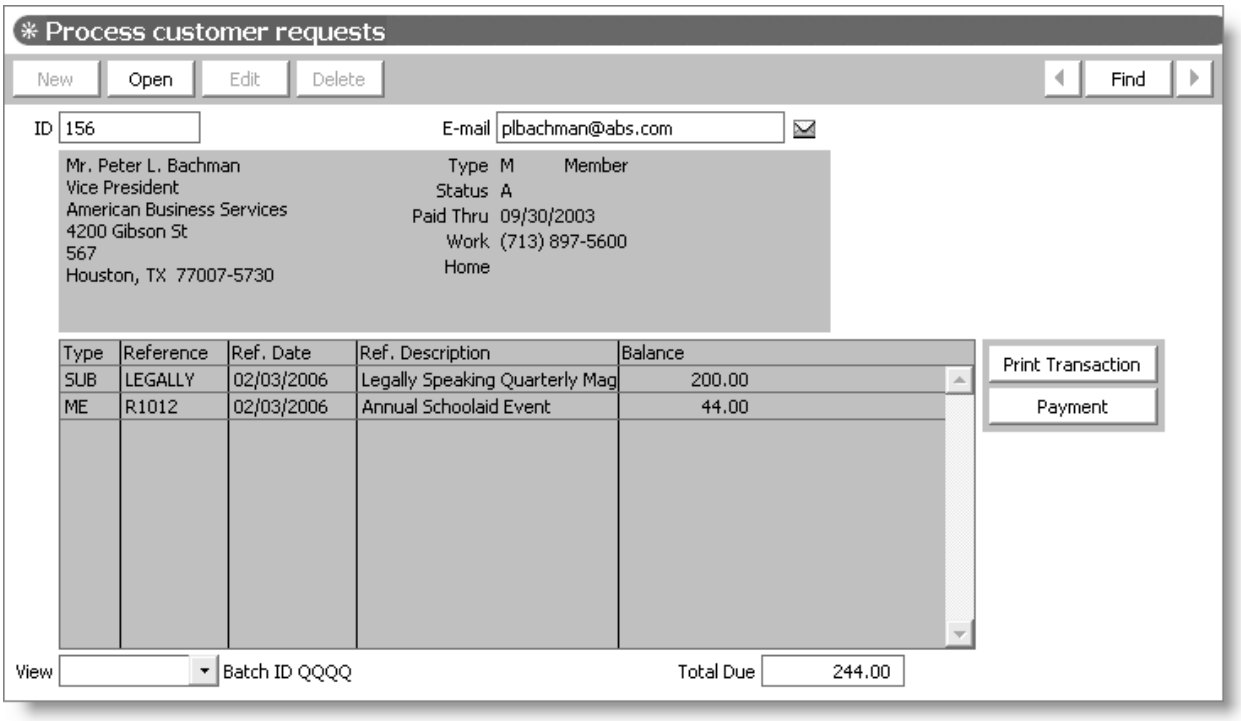
The Service Central module has three primary windows:

- Process customer requests window
- Payment entry window
- Generate reports

Several task list items on the Service Central task list are linked to other iMIS modules. This saves you time and effort when opening different modules to complete a single transaction. These links enable you to use related module windows:

- Process billing (Billing)
- Register a customer (see "Register a customer window") (Events)
- Enter and edit gifts (see "Enter and edit gifts window - Overview tab") (Fundraising).
- Process orders (either AR/Cash Simple Order Entry (see "Enter and edit orders window - Simple order entry") or Full Order Entry (see "Enter and edit orders window - Full Order Entry"))

Process customer requests window



Admin Console: Home > Customer Service > Process customer requests
Desktop: Service Central > Process customer requests

ID

This field specifies the customer identification number.

E-mail

Displays customer's e-mail address.

Message (envelope)

This icon opens the Confirmation of Transaction – Summary – Message (e-mail) window where you can send a Transaction Summary. You must select Current Batch from the View drop-down list.

Print Transaction

This button sends the Transaction Summary report to the user's designated location (for example, Screen or Printer). It is available in the Current Batch view if you are using the Batch Control option. You must select the batch that contains transactions for the selected customer.

Payment

This button opens the Payment Entry window. By default, the Pay Amount field auto-populates with the total amount due for any unpaid open item(s) and each open item displays with the order type, date, description, and balance due with the Pay option auto-selected for each item.

Type

Displays the source module or the transaction type.

Reference

Displays a number the system assigns to the transaction.

Ref Date

Displays the date the referenced transaction occurred.

Ref Description

Displays a description of the referenced transaction.

Note: A detailed description displays for Orders (OE) if your administrator has enabled 1st Line Desc. on Statement in the AR/Cash module. If this option is not enabled, only the transaction name, Order displays in this field.

Balance

Displays the amount the customer owes for the referenced transaction.

View

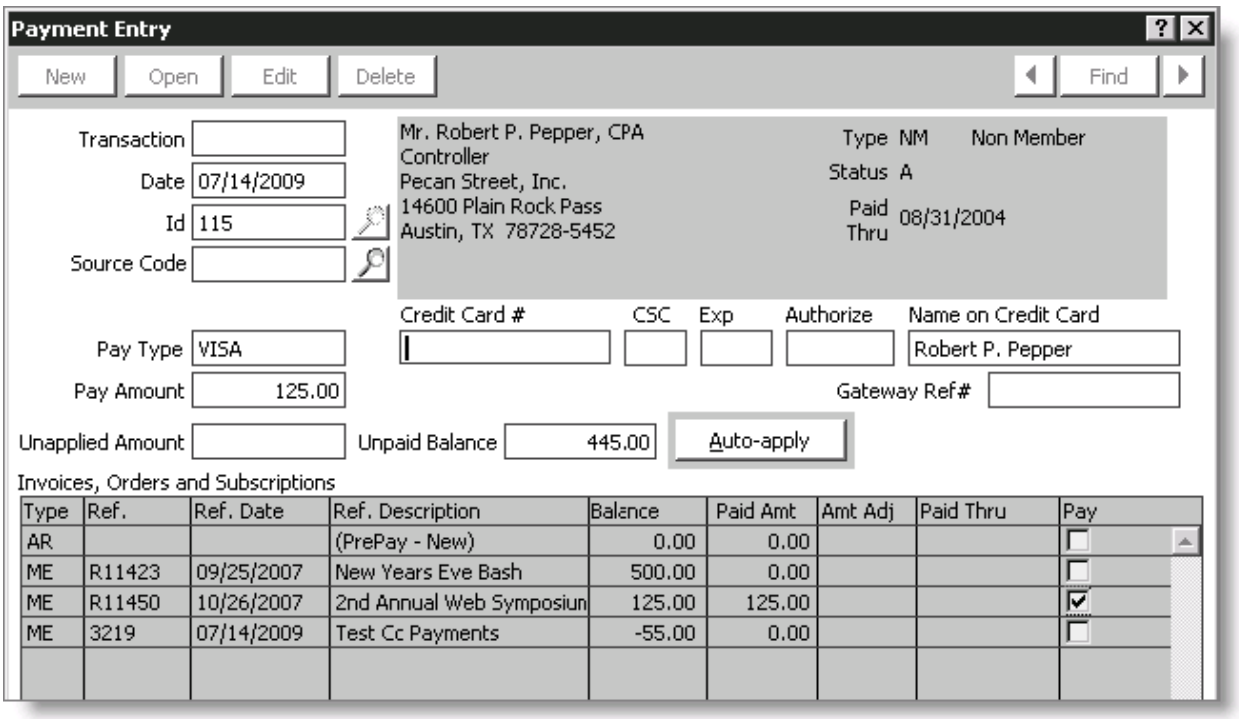
Specifies which requests are shown for the current customer ID:

- All – Shows all customer requests for the specified customer ID.
- Outstanding – Shows only outstanding customer requests for the customer ID.
- Current Batch – Shows only requests in the current batch for the customer ID.

Total Due

Displays the total amount (balance) of all line items displayed.

Payment Entry window



From Service Central, select Process customer requests, and click Payment

Transaction

Displays the transaction number.

Date

Defaults to the current system date or the batch date if you are using the Batch Control option.

Id

Specifies the customer identification number or if the company is responsible for the payment, this is the company ID. You can click the lookup icon to select a value.

Source Code

(optional) Use to indicate how the payment was made (for example, phone or mail).

Check/CC

Specifies a check number or a credit/debit card code (for example, MC, VISA, AMEX, and DISC). If you enter a valid credit/debit card code, additional payment fields display:

- CC # - Enter the credit/debit card number.
- CSC - (Displays only if the associated card authorization account uses immediate authorization, or deferred authorization with the Save CSC Prior to Authorization checkbox selected) Enter the Card Security Code. CSC can be a required value (see "Requiring a Card Security Code (CSC) for credit/debit card transactions") for specific cash accounts.
- Exp - Enter the card's expiration month and year (mm/yy).
- Authorize - Enter any authorization code here. (If credit card authorization is enabled, this field populates when the payment is approved.)
- Name on CC - Enter the name as it appears on the payment card.
- Issue # - (Displays only if the associated cash account accepts an issue number) Enter the European debit card's issue number.

- Issue Date - (Displays only if the associated cash account accepts an issue date) Enter the European debit card's issue date (mm/yy).
- Gateway Ref # - Read only: Populates when the gateway provider returns the reference number for the transaction.

  Note: If Advanced PCI Compliance (see "Implementing Advanced PCI Compliance options") > Do not retain cardholder information is enabled, iMIS saves transactions without cardholder data and shows only gateway reference number and authorization code fields.

  Pay Amount

  The system populates this field with the customer’s current session balance due (except Fundraising and credit balance line items) when a customer’s record is opened in the Process customer requests window. This field can be overridden if the customer wants to pay a different amount.

  Unapplied Amount

  Displays the amount of the current payment that has not yet been applied.

  Unpaid Balance

  Displays the total of balance due for items not selected (checkbox enabled) for payment.

  Auto-apply

  Used to enable the system to automatically apply a payment.

  Type

  Displays the source module or the transaction type.

  Ref

  Displays a number the system assigns to the transaction.

  Ref Date

  Displays the invoice reference date.

Ref Description

Displays a description of the referenced transaction. A detailed description displays for Orders (OE) if you enable 1st Line Desc. on Statement on the AR/Cash System Setup window. If you do not enable 1st Line Desc. on Statement, only the transaction name, Order displays in this field.

Balance

Displays the balance for a specific transaction.

Paid Amt

Displays the dollar amount the customer designated to be applied to the specific line item.

Amt Adj

Displays the positive difference between the Balance and Paid Amt used for cash Dues/Subscription billing only.

Paid Thru

Displays the Paid Thru date associated with the specific cash-basis Dues/Subscription line item. This field is populated only if the item has been paid in full.

Pay

Use this checkbox to select or deselect a line item for payment.

Batch Id

Displays the batch number of the current open batch if you are using Batch Control.

Using Service Central

Request and Payment Processing

Most of the tasks you perform in Service Central will take place in the Process customer requests and Payment Entry windows. However, iMIS Service Central contains several

windows to allow you to enter records and transactions.

- The Register a customer window allows you to register a customer for an event function.
- From the Enter and edit gifts window you can process customer gifts and pledges.
- You can process orders using the Process orders window.
- The Enter and edit payments window is available to allow you to record miscellaneous sales and cash receipts.
- You can use the Process billing window to bill new customers for cash-only dues or subscription.
- The Process customer requests window allows you to process orders and transactions to completion.

Processing Orders and Event Registrations

Scenario: A current customer calls to purchase two sets of customer labels and would like to register for an annual event. The customer is paying by credit card and needs a receipt. This requires you to:

- Use the Process customer requests window to place an order and register a customer for an event,
- Apply a single payment for two open items using a credit card,
- Print and/or electronically mail a receipt, called a Transaction Summary.

To enter an order

1. From Service Central, select Process orders. The Overview tab is displayed by default.
2. Click New.
3. Enter the Order Summary information.

- Order Type - use the lookup icon to select a value, type an entry, or leave the default entry (if any) as it is. Press Tab to accept the value and move to the next field.

- Bill to ID - type in or use the lookup icon to select an ID.
- Order Date - accept the default or override if necessary.

  Note: The Order Date defaults to the batch date if you use batch control; otherwise, the date defaults to the system date.
- Purchase Order - enter a purchase order number if necessary.
- Source - Enter a code or click the lookup icon to select a value.
- Shipping Method - (optional) Override the default shipping if necessary.
- Tax Authority - (optional) Override the default tax authority if necessary.

4. Enter General order information.

- Terms - (optional) Override the default payment Terms if necessary.
- Discount - (optional) Enter a percentage discount for the order in the % Discount field.
- Priority - (optional) Enter a backorder Priority for the order.

5. Enter a Product.

- Product - Enter a code and press Tab.

  Note: Click the lookup icon to open the Product Find window where you can look up and select a product.
- Description - the field is populated automatically.
- Quantity - (optional) Enter the Quantity.
- Price - (optional) Edit the product Price if necessary.
- % Disc - (optional) Enter a percentage discount for the product in the % Disc field.

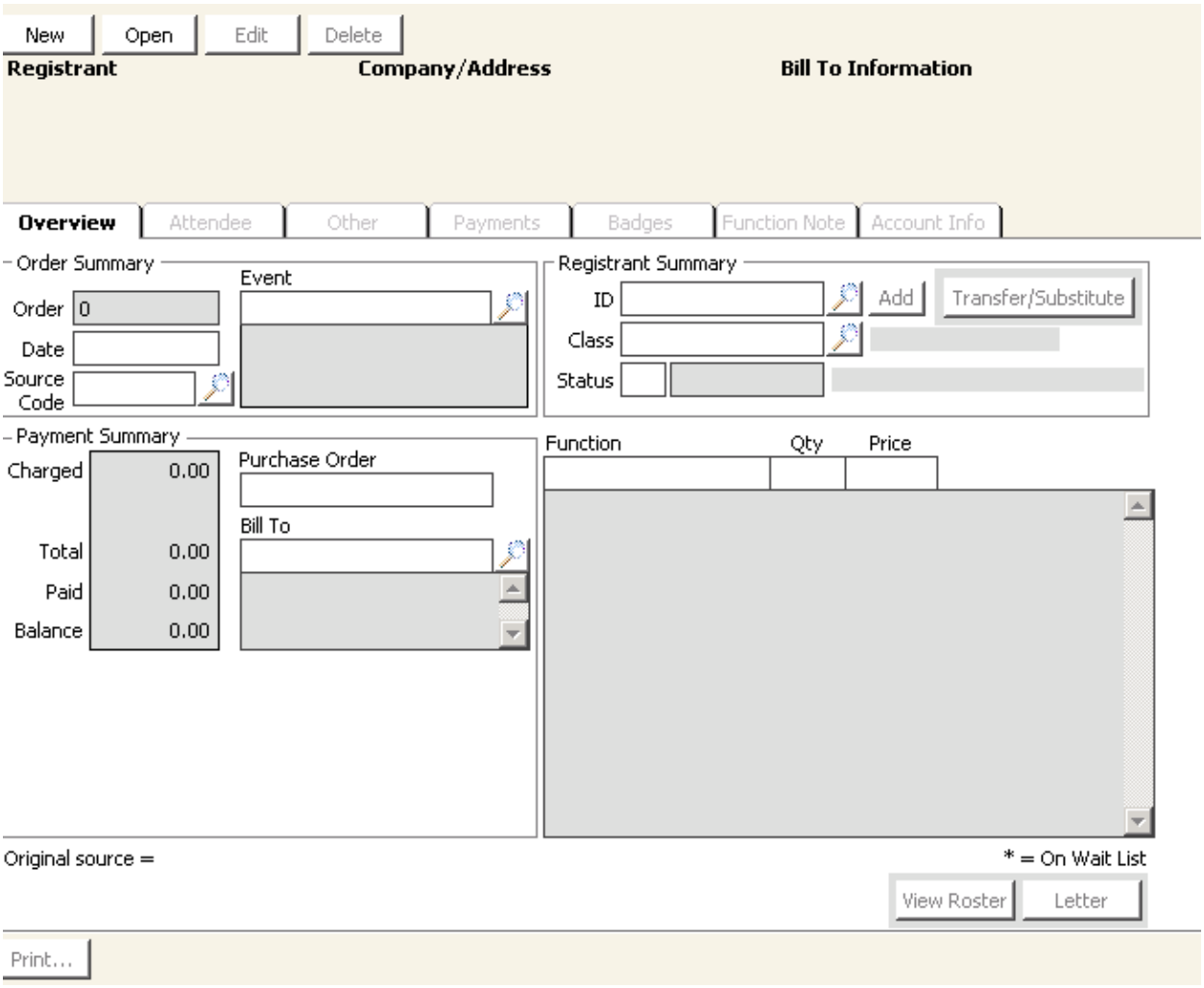
  Note: Entering a product-level discount in the % Disc field overrides any order-level discount entered in the % Discount field. However, product-level discounts are applicable only for a given product and do not affect entire order-level discounts.

- Press Tab to add the product to the order. The product is displayed in the list of Product Line Items, and your cursor is moved to the Product field.

6. Enter additional products.
7. Click Save.
8. From Service Central, select Process customer requests. Notice that the order (OE) you just processed is now a line item on the Process customer requests window.

   Note: You can click and drag the vertical lines between items on the Process customer requests window so that you can see all the information in a column.

Register for an event window



Admin Console: Home > Customer Service > Register for an event
Desktop: Service Central > Register a customer

To register a customer for an event

1. From Register window, click New.

- If you already have an ID selected, it automatically populates the ID field.
- Otherwise, enter or look up a customer ID.

2. Register the customer for an event. For more information about registering customers, see the iMIS Events guide.
3. Click Save.
4. Select Process customer requests.

The event registration (ME) is a new line item on the Process customer requests window. The system keeps a running total of the Balance field in the Total Due field.

Note: You can double-click on any line item on the Process customer requests window to view and edit data specific to that item. For example, if you double-click the ME (event) Type line item, the Register a customer window displays with the event the customer requested. You can also edit the registration by deleting a line item or adding another function.

Example: To pay for an order and a registration with one credit card payment

If you have added an event registration (ME) and placed an order (OE) for the active contact, you need to process only one credit card payment for the two open line items (ME and OE).

1. Select Enter and edit payments to open the Enter and edit payments window.

- All transactions processed for this customer display when All is the View on the Process customer requests window.
- The line items listed on the Process customer requests window are listed on the Enter and edit payments window for the Current Batch, if any.

- By default, items entered during the current session (except Fundraising and credit balance line items) are checked for payment when you open the Payment Entry window from the Process customer requests window. You can deselect any item and apply a partial payment.

2. Enter a credit/debit card code in the Check/CC field and complete the customer's card information.
3. Click Save to apply the Pay Amount to the checked items.
4. Close the window to return to the Process customer requests window, which now shows the line items with a zero balance.

   After you apply the payment, you can view the items and transaction history:

- Open the customer's event registration record in the Process customer requests window by double-clicking on the event line item.
- Select AR/Cash > Credit card reporting > Search credit card info (see "To search credit/debit card transactions|topic=Search credit card info window"), and enter the customer ID or Credit Card # to search for and review the customer's credit card payment history window.

Sending a Summary Transaction Report

The Summary Transaction report serves as a receipt for the customer. The report shows all services and payments transacted for the customer during the current (or today's) session. If you have an e-mail address listed for the customer (Manage customers window), you can mail a printed report to the customer or send the report using e-mail.

To send a receipt by e-mail

1. Verify that the customer has an e-mail address.

   Note: If a customer does not have an e-mail address on record, you can add one using the Manage customers window. If you add an email address, or one is already on file, it is shown automatically in the e-mail field on the Process customer requests window.

2. Select Current Batch from the View drop-down list.
3. Click the e-mail (small envelope) icon. The Confirmation of Transaction – Summary e-mail message opens displaying a Transaction Summary report.
4. Enclose an attachment or perform any other required e-mail functions.
5. Click Send.

Creating an Open Cash Dues Item for a New Customer

You can apply a payment to both cash and cash accrual dues, but the two types of payments display differently on the Service Central windows.

- Only cash dues subscriptions invoke the Paid Thru dates and display as individual line items on the Payment Entry window
- You can bill a customer for cash dues, but not accrual dues through the Service Central module
- You can only bill the customer once using Service Central for dues products from the Member Type table.
- Accrual billings are included in one line item, as in the Cash Receipts window. After the initial billing, only additional dues and non-dues items may be processed for a customer in Service Central.

Scenario: A customer calls to join the association in order to receive a price break on an order. This requires you to:

- Enter new customer information
- Create an open dues item
- Process an order
- Apply a credit card payment for both Dues and Orders

To add a new customer

1. Enter information for the new customer on the Manage customers window.

2. Click Save.
3. From Service Central, select Process customer requests to open the Process customer requests window populated with the new customer information.

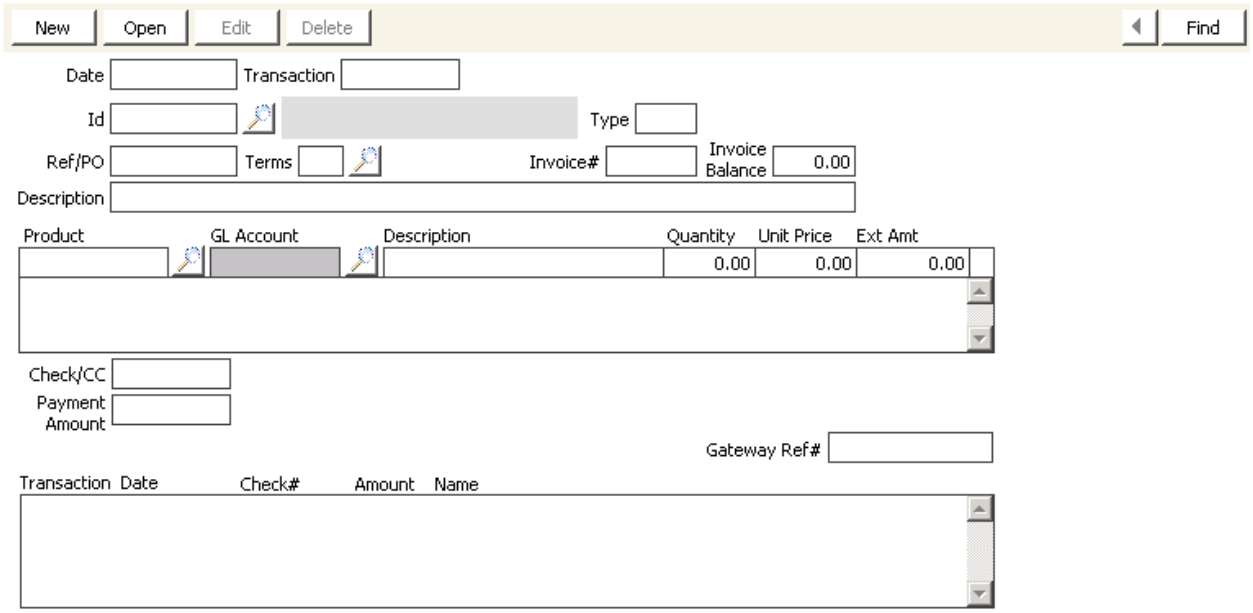
To create an open dues item

1. From Service Central, select Process billing to open the Process billing window.
2. Click New to populate the window with the customer information.
3. Click the checkbox to enable the Bill New Mem. Type Items feature. New fields display when you process a dues item that has not been billed.
4. Click Bill New on the Process billing window to create a cash dues open line item.
5. Click Save.
6. From Service Central, select Process customer requests to open the Process customer requests window with the new dues/subscription line item (SUB).

To process an order

1. From Service Central, select Process orders to open the Process orders window.
2. Click New.
3. Accept the default Order Type, or change it by clicking the lookup icon to select a type or by entering a value.
4. Press Tab and continue to enter the order information.
5. Click Save.

Process sales transactions window



Admin Console: Home > Customer Service > Process sales transactions

Desktop: Service Central > Process sales transactions

To apply a credit card payment to outstanding items

Note: You are still processing request(s) for the same customer.

1. From Service Central, select Process customer requests.
2. The order you entered displays in the Process customer requests window. Click Payment to open the Payment Entry window with the customer's outstanding (unpaid) items.

   Note: All line item checkboxes are selected (check in Pay column) for payment except Fundraising (FR) and credit balance line items.
3. Enter payment information.
4. Click Save to apply the Pay Amount to all selected items.
5. From Service Central, select Process customer requests.

   Notice that the Balance for the OE line item you entered has a Total Due of $0.

Processing Fundraising Gifts and Pledges

Where you process fundraising gifts and pledges depends on their type. You must pay Single Gifts through the Fundraising Enter and edit gifts window, but you can pay Single Pledge and Installment pledges through the Service Central Payment Entry window.

A pledge is a contribution that will be paid at a later date. A pledge can be either a single pledge or an installment pledge. For example, a customer might pledge $1,000, which they agree to pay at a particular date in the future, either in one payment (single pledge) or in a series of predefined payments (installments). You can customize the amount and the payment schedule.

You can also process acknowledgements, member tributes, split gifts, and setup an installment pay plan for pledges.

To enter a single gift or pledge (Service Central)

Payments for single gifts must be made at the time the gift is entered. You can pay for a single gift by entering a check number, credit card number, an in-kind non-cash asset account (if you are entering an in-kind or asset contribution), or by applying an open credit.

A pledge is a donation to be paid at a later date and can be a single pledge or an installment pledge.

Note: In-kind contributions can only be made for gifts. iMIS Fundraising does not track single in-kind pledges or installment in-kind pledges.

1. From Fundraising, select Enter and edit gifts to display the Overview tab on the Enter and edit gifts window.
2. Click New.
3. Enter the donor ID, or click the lookup icon to select an ID. The donor's name and address information display in the Donor and Address areas.
4. Enter the date the gift was received in the Date Received field. The default is the batch date if batch control is enabled, or the current system date if batch control is not enabled.

5. Select Single Pledge or Single Gift from the Gift Type drop-down list.
6. Enter the total amount of the donation in the Gift Amount field.
7. Enter the Request, Distribution, Appeal, Campaign, and Fund information as necessary.
8. (optional) Enter the List as name.
9. (optional) Enter the Solicitor ID, or click the lookup icon to select a solicitor ID.
10. (optional) If there is an individual partially responsible for this donation who is not the donor, enter the Soft Credit ID, or click the lookup icon to select a soft credit ID.
11. For Single Gifts only:
    - Enter the payment information in the Check #/CC/In-kind/Asset field and its related fields as appropriate.
    - (optional) Enter a manual receipt number in the Receipt Number field.
    - (optional) Enable the Do not Print Receipt option to skip the printing of a receipt for this gift.
12. Click Save.
13. From Service Central, select Process customer requests. The gift or pledge you just entered will be shown.

    To process an installment pledge

    Scenario: A customer wants to make an installment pledge for $1000 to be paid in monthly installments.

    Note: If you select an installment pledge; select a down payment; and the customer is paying by credit card, only the installment down payment is charged to the credit card. The remaining installments populate on the Process customer requests and Payment Entry windows for payment at a later date.

    The credit card is not automatically billed monthly.

You do not have to click the down payment option, if the customer is paying with cash or check at a later date. Individual installments for a pledge populate on the Central Processing and Payment Entry windows until paid.

1. Find the donor from the Manage customers window.
2. From Fundraising, select Enter and edit gifts to open the Enter and edit gifts window.
3. Click New.
4. Select Installment from the Gift Type drop-down list. The Payment Info area of the window is grayed out because a pledge means that the money will be paid at a later date.
5. Enter the Total Amount of the installment pledge.
6. Enter the Distribution or income account where the pledge will be credited or, click the lookup icon to select a value.

   Note: Although you predefined the Distribution, you can override the value by manually entering a different combination of a fund, appeal, or campaign if your setup allows.
7. (optional) Enter the Appeal code and Campaign code if there is one associated with the pledge, or click the lookup icon to select a value.
8. Enter the Fund code associated with this pledge, or click the lookup icon to select a value.
9. Enter a credit card code in the Check #/CC/In-Kind/Asset field and complete the credit card information.
10. Click the Installments tab and specify the installment details:
11. Click the Installment Frequency from the drop-down list.
12. Click to enable Pay a downpayment. The down payment amount displays under the Prepay column.

    Note: If the customer is making a credit card payment, you must select Pay a downpayment or when you return to the Enter and edit gifts window and you click Save, a message informs you that you must first select the Pay a downpayment option.

13. Click Save.
14. From Service Central, select Process customer requests window.

Processing Payments in Service Central

In this section, you will apply payments for outstanding items using the Enter and edit payments window directly from the Service Central menu. There are three different payment scenarios:

- Applying a specified Pay Amount to all unpaid line items (full payment)
- Applying a payment toward specific unpaid line items
- Applying a payment to multiple unpaid line items using the Auto-apply button

To apply a specified payment amount to all unpaid items

1. From Manage customers, find a customer record.
2. From Service Central, select Process customer requests, and click Payment to open the Payment Entry window.
3. Click New.
4. Enter an Id and press Tab to populate the Payment Entry window, or click the lookup icon on the Id field to select a customer record.
5. Enter a check number or credit/debit card code in the Check/CC field and enter the required card information.
6. Enter a dollar amount equal to the Unpaid Balance and press Tab in the Pay Amount field. Notice the Pay Amount, Unapplied Amount, and Unpaid Balance fields are equal because no line items have been selected for payment.
7. Click the checkbox in the Pay column to select the line item(s) where payment will be applied.
8. Click Save to update the customer's record with the payment.

To select open items for a payment

1. From Manage customers, find a customer record.
2. From Service Central, select Process customer requests, and click Payment to open the Payment Entry window.
3. Click New.
4. Enter an Id, or click the lookup icon on the Id field.
5. Enter a check number or credit/debit card code in the Check/CC field and enter the required card information. Do not enter any information in the Pay Amount field.
6. Click the checkbox in the Pay column for each line item that you want to select for payment.

   Note: The Pay Amount field increases by the line item amount as you select each line item. If you select the wrong line item, click to deselect (uncheck) the checkbox.
7. Click Save.

To apply a payment to multiple items using Auto-apply

1. From Manage customers, find a customer record.
2. From Service Central, select Process customer requests, and click Payment to open the Payment Entry window.
3. Click New.
4. Enter an Id and press Tab to populate the Payment Entry window, or click the lookup icon on the Id field to select an ID.
5. Enter a check number or credit/debit card code in the Check/CC field and enter the required card information.
6. Enter the amount of the check in the Pay Amount field.
7. Click Auto-apply. The Pay Amount is applied to the oldest line items first. Open Dues (SUB) items have the highest priority.

Note: Auto-apply does not automatically select Fundraising items for payment, you must manually select them.

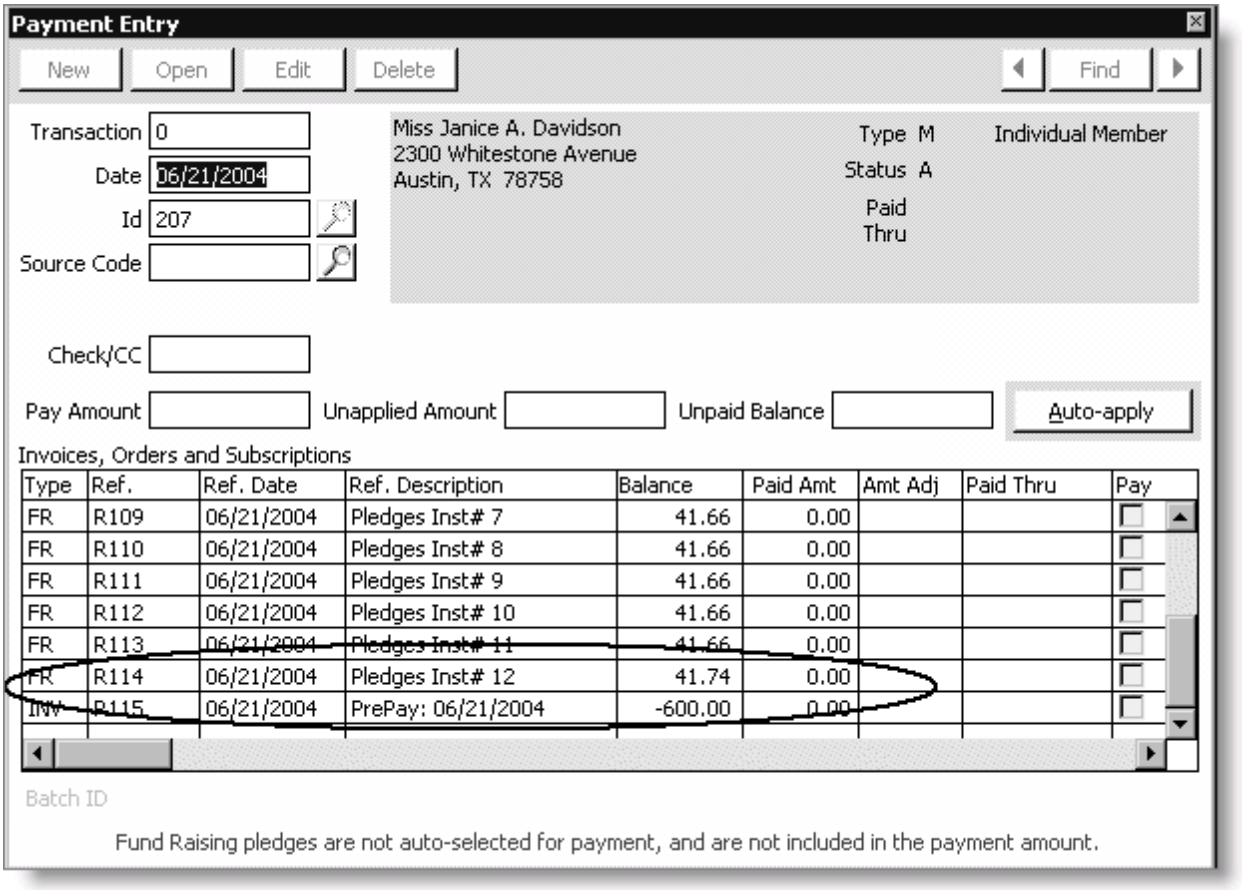
8. Click Save.

Applying a Credit Balance to a Specific Item

A credit balance is an overpayment that occurs when a customer unknowingly sends in too much money to pay an Unpaid Balance. You can apply an open credit balance in Service Central by selecting Process customer requests, and clicking Payment.

Note: Do not create credit and debit memos using the Service Central module; perform credit and debit memos only in the AR/Cash module.

Note: Overpayments (credit balances) to Fundraising items are not recommended. Apply these overpayments to the Pre-Pay line. A message stating this appears at the bottom of the Payment Entry window.



Example of a credit balance line item

Scenario: A customer calls and places an order that is processed through the Process customer requests window. Now the customer wants to pay the Unpaid Balance. The customer has an open credit balance. When you open the Payment Entry window from the Process customer requests window, all items except the credit balance are automatically selected (checked) for payment. The Pay Amount has been generated to equal the amount of all selected line items (except Fundraising line items).

To apply a credit balance through the Process customer requests window

1. From Service Central, select Process customer requests to open the Process customer requests window.
2. Open the customer's record and select Outstanding from the View drop-down list.
3. Click Payment to open the Payment Entry window.
4. Select the credit item by clicking the Pay checkbox. This applies the credit to all items that were automatically selected for payment.
5. Click Save.

Note: If you only select the open credit line item for payment or multiple open credit line items, when you click Save to apply the credit, a message displays informing you that you have only selected credit items for payment. Click No to select more unpaid items for payment, or click Yes to have the system apply the credit.

To apply a credit balance using Auto-apply

A customer sends a check to make a partial payment on an unpaid balance. The customer has an open credit balance. In this scenario, you would open the Payment Entry window from the Service Central menu.

When you open the customer record, no line items are selected for payment. You will enter a check number and the amount of the check. To apply the open credit, select the credit line item by checking the box in the Pay column.

The amount of the credit is added to the Unapplied Amount and the Pay Amount is not affected. If you press the Auto-apply button, the entire Unapplied Amount (including the Pay Amount and credit) is auto-applied to the Unpaid Balance in order of priority.

Note: Fundraising line items (FR) are not paid using Auto-apply.

From Manage customers, find a customer record.

1. From Service Central, select Process customer requests, and click Payment to open the Payment Entry window.
2. Click New.
3. Enter an Id and press Tab to populate the Payment Entry window, or click the lookup icon on the Id field to select an Id.
4. Enter a check number in the Check/CC field.
5. Enter the amount of the check in the Pay Amount field.
6. Select the credit line item by clicking the checkbox in the Pay column.
7. Click Auto-apply to apply the credit line item and check payment.
8. Click Save.
9. Close the window.

Note: If you reopen the Payment Entry window or the Process customer requests window with the same record, the credit does not display in either window.

Applying a Credit Balance Using *TAB

The *TAB feature allows you to apply a credit to a customer record. A credit balance is a result of an overpayment that occurs when a customer sends in too much money to pay an Unpaid Balance. You can use *TAB in Service Central for dues/subscriptions (including cash and accrual methods (SUB)), Meeting (ME), Orders (OE), Fundraising (FR) and AR/Cash (INV) transactions.

The *TAB feature works through the Process customer requests window and directly through the Payment Entry window. There are some differences in how payment information is presented depending on which process you choose to use.

The following procedures address using *TAB through the Process customer requests window then accessing the Payment Entry window and directly through the Payment Entry window only.

To apply a credit balance from Process customer requests

1. From Service Central, select Process customer requests to open the Process customer requests window.
2. Click Find to locate the customer's record.
3. Click Payment to open the Payment Entry window.

   Note: The Pay Amount field is the total of the line items checked for payment in the Pay column. Line items are automatically checked for payment except, Fundraising (FR) and credit balances. If you go directly to the Enter and edit payments window (from Service Central, select Enter and edit payments), checkboxes in the Pay column are not automatically checked for payment.
4. Place your cursor in the Check/CC field and enter an asterisk (*), and press Tab to open the Select Open Payments window.

   The view defaults to an individual view. If you press All, all customer records with an open credit balance displays.

   Note: All credit balances from overpayments to Fundraising or Accrual Dues items are filtered out and will not display on the Select Open Payments window.
5. Make a mental or written note of the available credit balance. Double-click on the line item or, select the line item and click OK. The system returns to the Payment Entry window.
6. Enter the amount of the available credit balance you wish to apply in the Pay Amount field. Do not enter more than the amount of the available credit balance.

7. Click Save. The system populates the Check/CC field with the invoice reference number of the original transaction that resulted in a credit balance.

To apply a credit balance from Enter and edit payments

1. From Service Central, select Enter and edit payments to open the Enter and edit payments window.
2. Click New.
3. Press Tab and enter an Id, or click the lookup icon to select an Id.
4. Press Tab. The system populates the Enter and edit payments window with the individual's payment information.
5. Place your cursor in the Check/CC field and enter an asterisk (*), and press Tab to open the Select Open Payments window.

   The view defaults to an individual view. If you press All, all customer records with an open credit balance displays. The above view is All.

   Note: All credit balances from overpayments to Fundraising or Accrual Dues items will be filtered out and will not display on the following window.
6. Double-click on the line item or, highlight the line item and click OK. The system populates the Check/CC field with the invoice reference number of the original transaction that resulted in a credit balance. Make a mental or written note of the available credit balance.
7. Enter the amount of the available credit balance you wish to apply in the Pay Amount field. Do not enter more than the amount of available credit balance.
8. Select line item(s) by clicking the checkbox in the Pay column that you wish to pay with the credit balance.
9. Click Save.

Processing List Payments

The list payments feature allows you to apply a payment for dues products (membership dues and subscriptions) to a list of individuals that share a Bill To contact. For example, if a company sends in a dues payment billed for their employees that are members of your organization, you can apply that payment to each individual record from a single page.

Dues products billed to the company will appear in the list based on the following criteria:

- The company record is assigned the company member (CM) Member Type
- The company's ID is either:
- Entered in the Bill To ID field on the individual's Financial tab (from Customers, select Manage customers, find the customer record, and select the Financial tab)
- Entered in the individual's subscription Bill To field (from Customers, select Manage customers, find the customer record, select the Billing tab, and create or open a subscription)

To process list payments

1. From Service Central, select Enter and edit payments.
2. Click New.
3. Accept the default date or enter another value.
4. Enter an Id or click the Find icon to select a company ID.
5. Press Tab to populate the Enter and edit payments window.

   Note: The items in the list vary depending on whether they are billed as cash dues or accrual dues. A cash dues billing list includes the balances for each individual. An accrual dues billing list only displays a single balance and line per billing type, regardless of how many individual records were billed against the company ID.
6. Enter the Pay Amount.
7. Apply the payment in one of two ways:

- Select Auto-apply to automatically apply the Pay Amount
- Select the Pay checkboxes to choose line items to be paid

8. Click Save.

   The window is updated to only display the paid items.

Service Oriented Architecture (SOA)

iMIS SOA provides a secure set of web services for accessing the iMIS platform, across the organization, across different physical locations, and even across organizational boundaries.

This documentation contains the following sections:

Section	Description
Getting Started	Provides general information about iMIS SOA and iMIS Web Services
Working with iMIS SOA	Describes important concepts for developing with SOA, including a list of the addressable primary entities
Extending iMIS SOA	Describes how to build a new SOA module
Glossary	Describes some terminology used in ASI web services
.NET Examples	Provides C# examples pulled directly from ASI's automated test suite
PHP Examples	Provides examples showing how to use SOA with PHP
Namespace references	Provides reference information about the SOA namespaces available

Subscription Fulfillment

Subscription Fulfillment works with Customer Management to facilitate subscription processing for customers who distribute multiple periodicals. Subscription Fulfillment allows you to create mailing labels and provides the appropriate audit trails that conform to USPS second-class mailing standards.

Accessing Subscription Fulfillment

Subscription Fulfillment exists as a separate module with its own task menu items:

- Generate reports - Select this task list item to open the Generate reports window that allows you to print mailing labels.
- Set up tables - Select this task list item to open a sub-task list of the following items:
- Subscriptions – Select this item to open the Set up subscriptions window that allows you to set up and maintain subscription products.
- Maintain zones – Select this item to open the Maintain zones window that allows you to define and manage the transports or carriers that you use to ship your subscription orders.

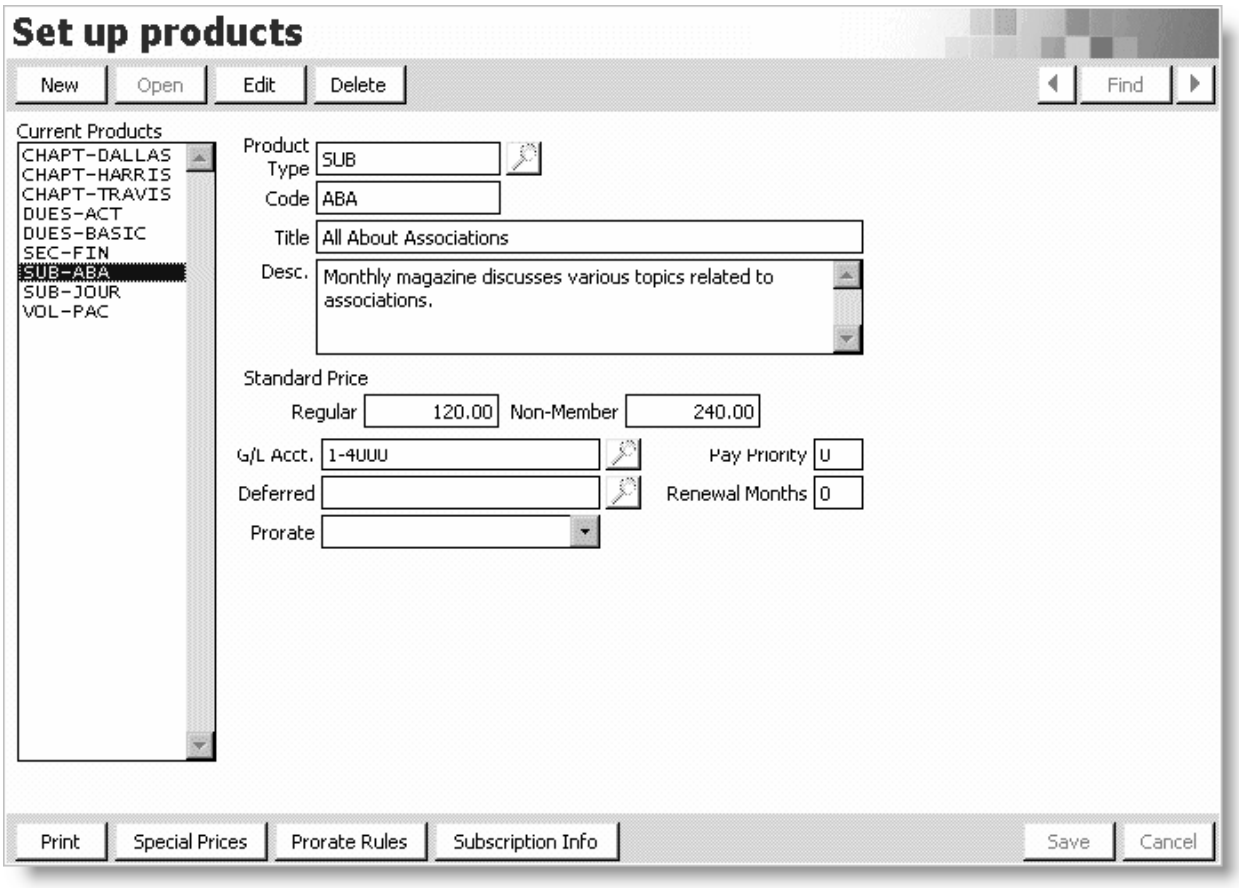
Subscription Product Management

Managing subscriptions involves setting up subscriptions, including journals and other publications for customers.

Creating SUB (subscription) products

The first step in managing subscriptions is to create product codes of type SUB on the Set up products window for each potential subscription-type product for which you intend to bill, or for products for which your organization collects money.

Set up products window



Subscription Fulfillment - Set up products window

From Billing, select Set up module> Products

Current Products

List of all available products

Product Type

A specific code for an individual product.

SUB –This product is used for optional subscriptions such as journals and magazines. This product type would not appear in the Set up customer types window, because SUB items are optional. After a member has subscribed to this product type, iMIS allows you to automatically bill for initial fees and renewals through cycle-definition rules. A SUB product type in Dues is used with the PUB product type in Advanced Subscriptions.

Code

Specifies a unique code that identifies the Product Type. The code entered should not contain any spaces or special characters other than an underscore (_), and should contain no more than 15 alphanumeric characters. This code can be used in the Billing Codes field on the Set up customer types window.

Title

Specifies a descriptive title of the Code. This title displays on the member's dues bill and other data entry windows.

Desc

(optional) Specifies a detailed description of the product.

Standard Price

(optional) Unless the billing interval is overridden in the Renewal Months field, the dollar amounts entered for the products should be in agreement with the standard billing interval set in the Set up general options window. For example, the rate for a product is $120.00 per year. Enter the flat rate of $120.00 when the standard billing interval is 12 (every 12 months or annual), $10 when the interval is 1 (once per month), and $240.00 when the interval is 24 (every 24 months or 2 years).

You can enter different rates for members and nonmembers.

- Regular – Default standard customer pricing. An entry in the Set up customer types window will override the Standard Price, and an entry in Special Pricing will override both customer-type pricing and Standard Price.
- Non-Member – Default nonmember pricing if there is no entry in Special Pricing or in the Set up customer types window.

G/L Acct

(optional) Displays the General Ledger account that will be credited when the payment is received or when the income is recognized.

Pay Priority

(optional) Determines the order in which payments are applied to multiple dues product lines. This can be used to sort the line items on a dues billing notice or renewal. A lower number has a higher priority than a larger number. For example, a product with priority 1 will appear on the payment and renewal list before a product with a priority of 2.

Deferred

(optional) Specifies the deferred income balance sheet account that should receive the credited amount. This features is available only when the system is licensed for the add-on Deferred Income module. A deferred income account should be entered if the income for this product type should be deferred and recognized during the membership or subscription term.

Renewal Months

(optional) Indicates the number of months the dues product type will be renewed for when payment is received. This number will override the Standard Billing Interval set in the Dues General Setup window if the product is being billed on a non-dues cycle. The product's standard billing interval will be used only for pricing determination on the dues billing cycle.

For example, an individual purchases a journal subscription as of 9/01/1999. The journal is set as a product with a rate of $45.00 for both members and nonmembers, with Renewal Months set at 60 months (five years). On a non-dues billing cycle, the journal line item will be billed for $45.00 with a paid thru date of 8/31/2004.

Prorate

(optional) This feature provides a drop-down list of prorate rules that were defined through the Special Pricing window. Prorating allows reduced rates for new members/subscribers who join during the annual membership term.

Subscription Info button

Opens the Subscription Information window where you can enter zone and postal sort information. This button displays only when you are licensed for Advanced Subscriptions and the Product Type is SUB.

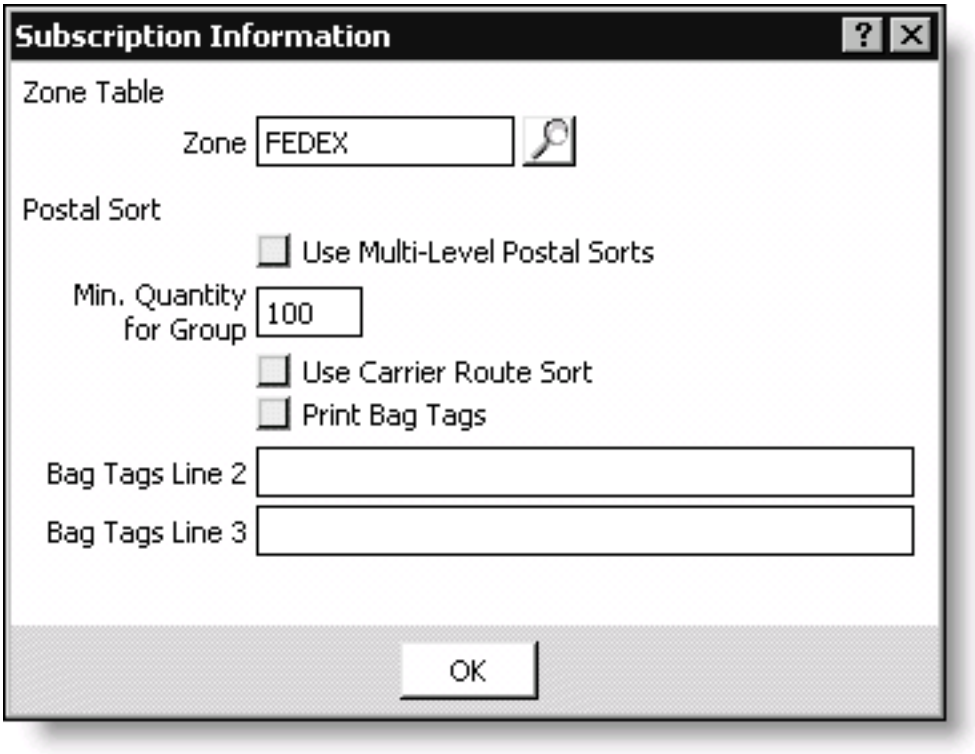
Special Prices button

Opens the Special Pricing window where you can define pricing rules for products.

Prorate Rules button

Opens the Prorating window where you can specify an amount to an activity or product that is proportional to some base.

Subscription Information window



Subscription Fulfillment – Subscription Information window

From Billing, select Set up module> Products, select a SUB product, and click Subscription Info

Zone Table

Zone – Specifies the code for the zone table used for this publication. The Edition Size report will report the Zone.

Postal Sort

Use Multi-Level Postal Sorts – Enable if the Single Mail Code or Multiple Mail Codes option have been activated on the Customer Setup – Address and Notes window (from Customers, select Set up module> General, and click Address and Notes).

Min Quantity for Group – Specifies the minimum number of labels that must print.

Use Carrier Route Sort – Enable if you are using Accumail and populating Name_ Address.CRRT.

Print Bag Tags – Select to print bag tags.

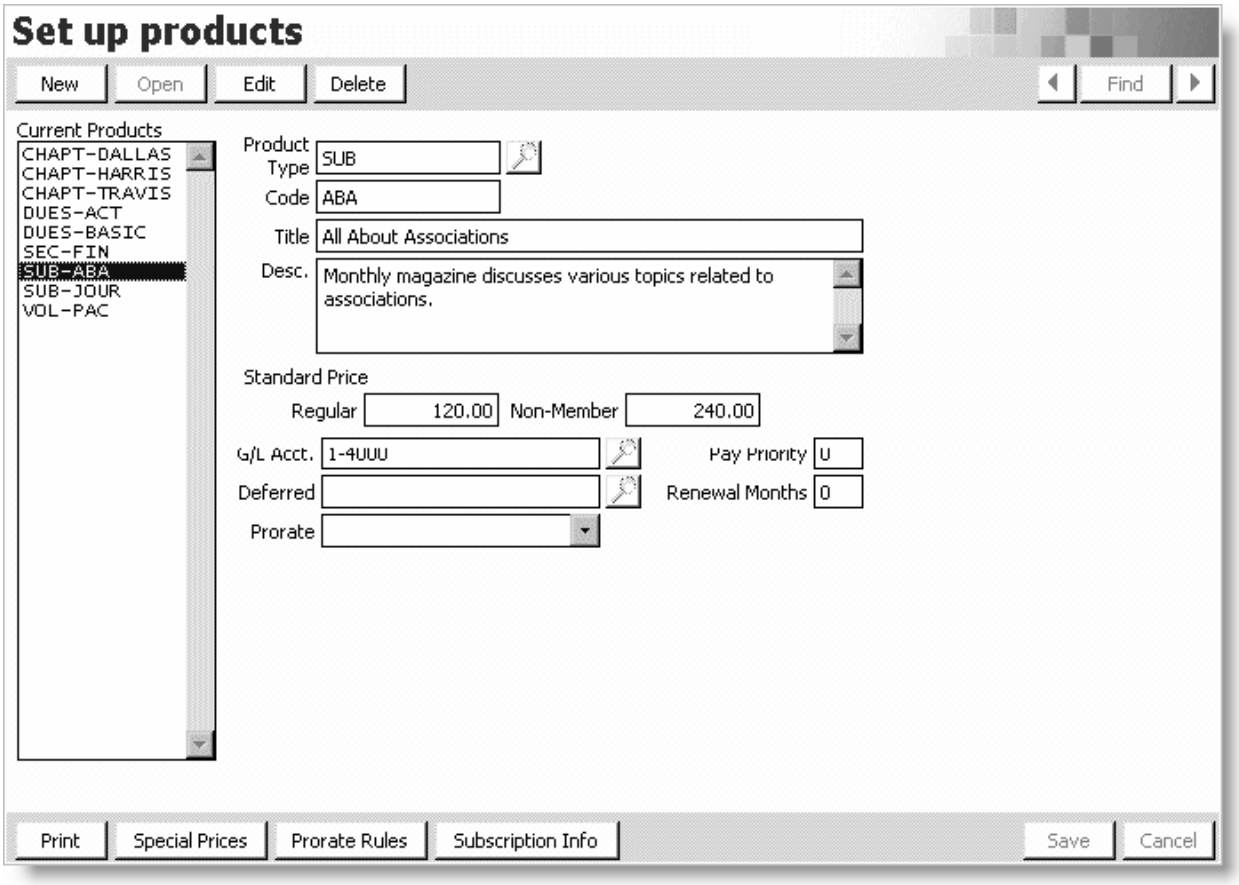
Bag Tags Line 2 – Specifies the information you want printed on the bag tag.

Bag Tags Line 3 – Specifies the information you want printed on the bag tag.

To define a SUB product

1. From Billing, select Set up module> Products to open the Set up products window:
2. Click New.
3. Enter SUB for the Product Type.
4. Enter the product Code. The code entered should not contain any spaces or special characters other than an underscore.
5. Enter the product Title.
6. (optional) Enter the product Description.
7. (optional) Enter the Regular pricing information.
8. (optional) Enter the Non-Member pricing information.
9. (optional) Enter the G/L Account.
10. (optional) Enter the Pay Priority.
11. (optional) Enter the Deferred account number.
12. (optional) Select the Prorate rule from the drop-down list.
13. Click Save.

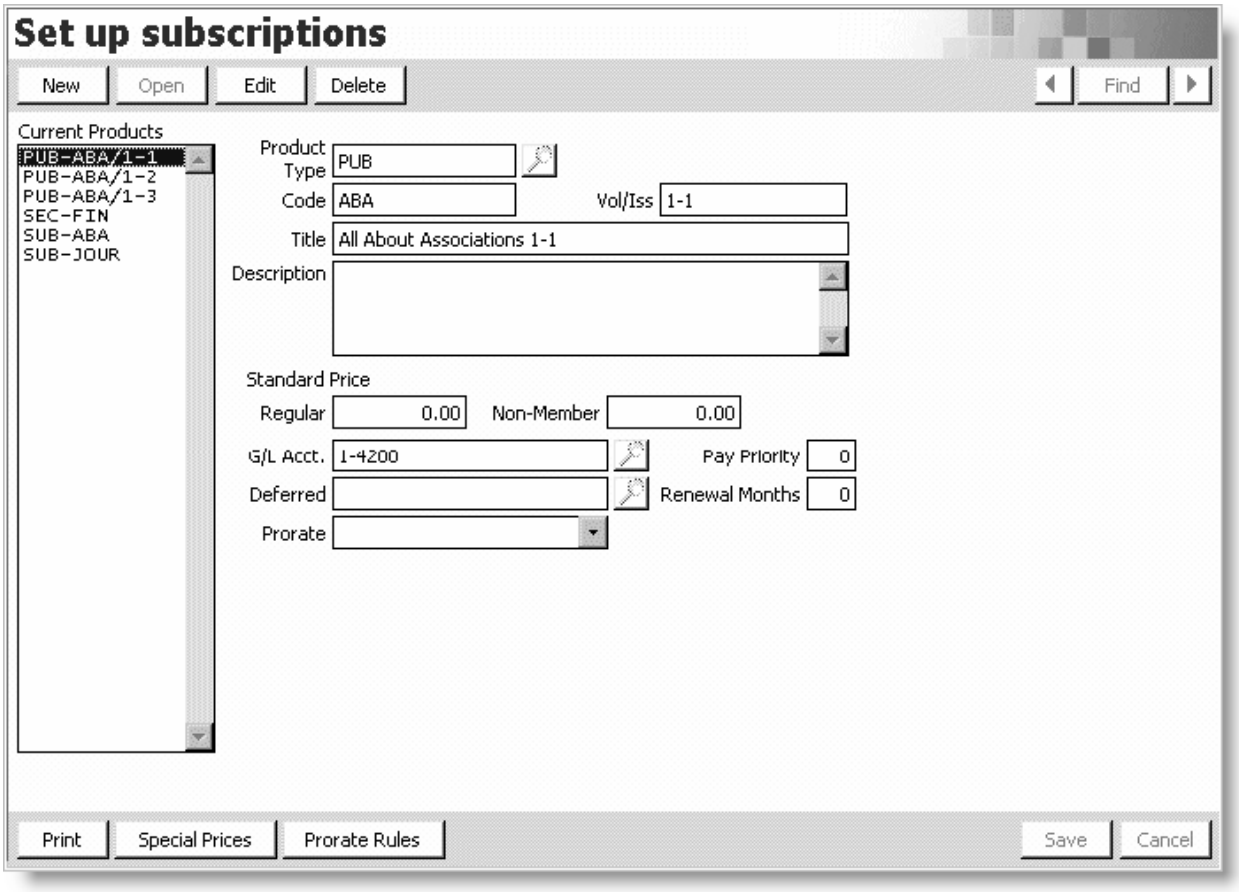
14. Click Subscription Info to open the Subscription Information window.
15. (optional) Enter a Zone Table.
16. (optional) Enable the Multi-Level Postal Sorts option.
17. (optional) Enter a Min Quantity for Group.
18. (optional) Enable the Carrier Route Sort option.
19. (optional) Enable the Print Bag Tags option.
20. (optional) Enter text for Bag Tags Line 2.
21. (optional) Enter text for Bag Tags Line 3.
22. Click Save.



Defining Publication Product Codes

You maintain individual publications belonging to a subscription (volumes or issues) on the Set up subscriptions window.

Set up subscriptions window



From Subscriptions, select Set up tables > Subscriptions

To define a subscription product

1. From Subscriptions, select Set up tables > Subscriptions to open the Set up subscriptions window.
2. Click New.
3. Enter PUB for the Product Type. The Vol/Iss field displays.

4. Enter the product Code. The code entered should not contain any spaces or special characters other than an underscore.
5. Enter the Vol/Iss number for this publication. Slashes are not allowed in the product code. Separate the Vol/Iss number with a dash.
6. Enter the product Title.
7. (optional) Enter the product Description.
8. (optional) Enter the Regular pricing information.
9. (optional) Enter the Non-Member pricing information.
10. (optional) Enter the G/L Account.
11. (optional) Enter the Pay Priority.
12. (optional) Enter the Deferred account number.
13. (optional) Select the Prorate rule from the drop-down list.
14. Click Save.
15. Repeat steps to enter each publication code for each volume/issue of this subscription.

Subscription Product Billing

Billing for a subscription product involves adding the subscription item to customer records, setting up a billing cycle, and running the billing. You will use the Customer Management and Billing modules to perform these tasks.

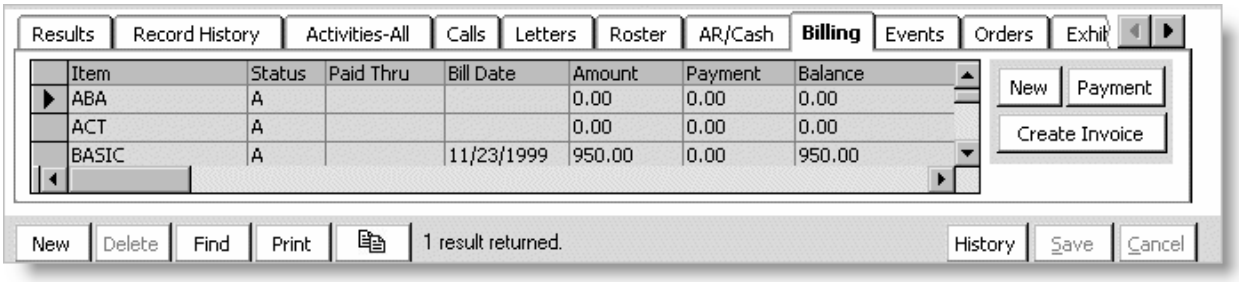
See AR/Cash: Deferred Income for how to defer dues/subscriptions income and events/exhibition/exposition income.

Adding a Subscription Item

Before printing labels for a subscription, you must add the subscription item to the customer's Dues/Subscriptions window and bill the customer for the subscription.

To add a subscription item to a customer record

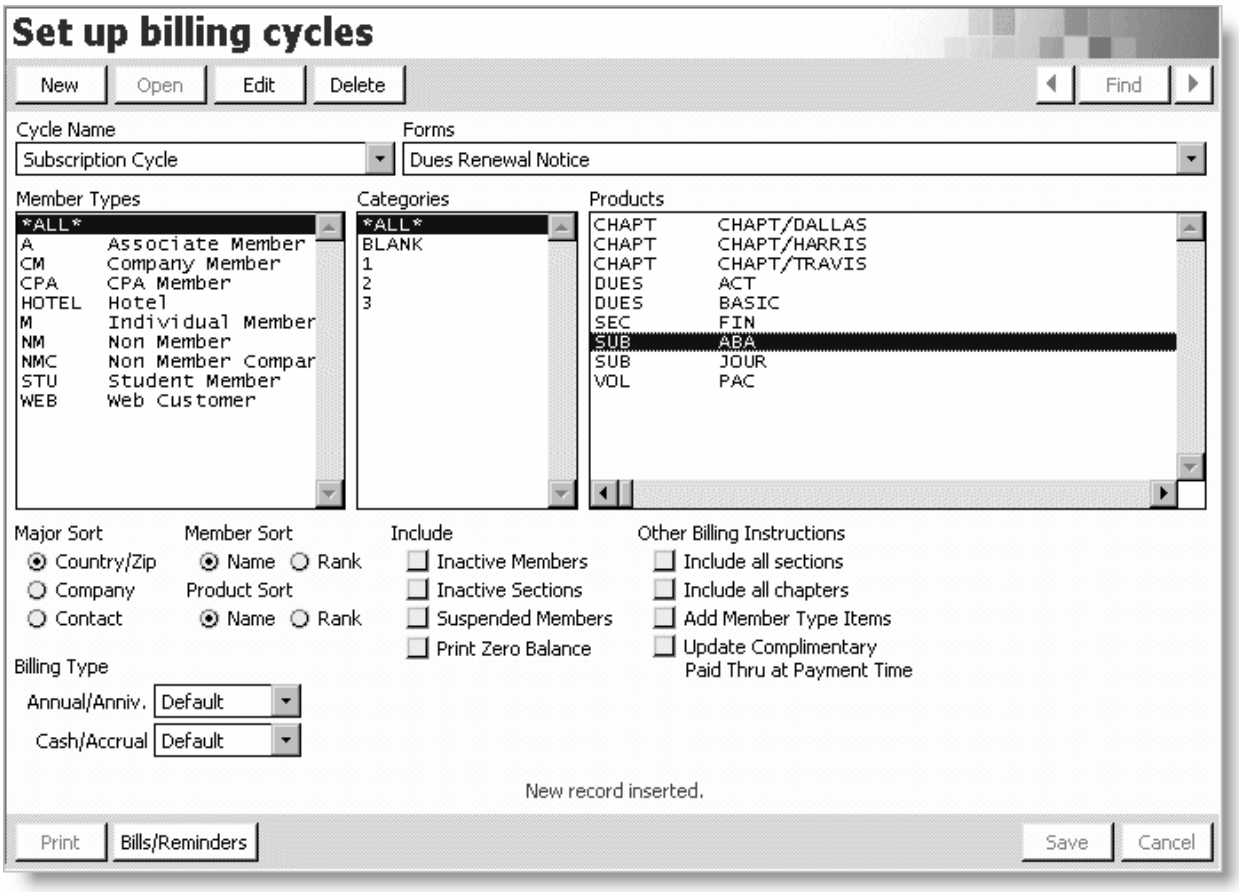
1. From Customers, select Manage customers and find the customer requesting the subscription.
2. Select the Billing tab.
3. Click New to open the Dues/Subscription Item Detail window.
4. Enter the subscription code in the Item field, or click the Find icon to select the code.
5. Enter the Begin Date.
6. Click Save to return to the Billing tab.



Billing for a Subscription Product

You can bill a customer for a subscription product once you add the item to the customer's Billing tab. The billing cycle does not add records for a customer; it only bills the records that you have added previously.

Set up billing cycles window



From Billing, select Set up module> Billing cycles

Cycle Name

Indicates the designated name for the group of records from which renewal notices will be generated. This name displays on the Process billing window with a list of available cycles.

Forms

Drop-down list of renewal notice formats

Member Types

A list of available customer types available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (selects range) while you select your selections. To bill all customer types, select *ALL* at the top of the scrolling list. For example, for a

subscription cycle where the subscription can be purchased by any customer, select *ALL*.

Categories

A list of categories available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (sequential range) while you select your selections. To bill all categories of customers or subscribers, select *ALL* at the top of the scrolling list. If BLANK is selected, only customers or subscribers with a blank or empty category will be selected.

Products

A list of products available to include in the billing cycle. For multiple selections, hold down Ctrl or Shift (sequential range) while selecting other selections. Products selected in this list will be billed only if an active subscription line item already exists for the customer.

For dues product billing, only select products that are optional add-on items to the mandatory or regular dues products. The Add Member Type Items option must enabled. If the Add Member Type Items option is enabled, all products listed on the Set up customer types window for the customer types selected will be billed automatically during this billing cycle. These customer type-referenced products should not be selected on the scrolling list.

Shortcut – To select all chapters (CHAPT) and sections (SEC), enable the Include all sections and Include all chapters options located in the Other Billing Instructions section.

Major Sort

This option specifies the order in which the bills are sorted for printing. The choices include Country/Zip (postal code), Company (company sort), and Contact (individual's last name, first name).

Member Sort

This is used only for list bills (where the dues and/or subscription products for several individuals or branches are itemized on a single bill and sent to a single parent company or a third party). It establishes the order in which the individuals (Ship to) are listed on the list bill. You can sort by Name (last, first) or Rank (not currently in use).

Product Sort

This option controls the order of the line items on the dues bill. Select Name (to sort alphabetically by product code) or Rank (to sort by the payment priority shown on the Set up products window).

Include

Specific options that are included in the billing cycle, when enabled.

- Inactive Members – Select to bill customers whose status begins with I (inactive).
- Inactive Sections – Select to force the billing of SEC-type subscription in which the subscription's status begins with I (inactive).
- Suspended Members –Select to bill customers whose status begins with S (suspended).
- Print Zero Balance –Select to print bills with zero balances. For example, if you enable this option, iMIS will generate a bill for a customer who receives a complimentary (zero dollar amount) membership. Not enabling this option causes iMIS to bypass all zero balance bills during the printing process.

  Note: This option applies only to bills with a total balance of zero.

Other Billing Instructions

Include all sections –Bills all active subscription records of the product type SEC for the customer types selected. If multiple sections exist, all sections will be included.

Include all chapters –Bills active subscription records of the type CHAPT for the customer types selected. If multiple chapters exist, all chapters will be included.

Add Member Type Items –Use for dues billing. This option bills customers for all product codes defined on the Set up customer types window. If this option is enabled, select only

those items in the Products list not covered on the Set up customer types window or by the options Include All Sections and Include All Chapters.

Note: When Add Member Type Items is selected, new subscription records will be created only for items included on the Set up customer types window. All other products selected for the dues billing cycle will be billed only if an existing active subscription record already exists for that customer. The Add Member Type Items option must be enabled for dues billing and should not be enabled for non-dues product billing.

Update Complimentary Paid Thru at Payment Time – When enabled, allows the Paid Thru date for complimentary items (no charge products) for this billing cycle to be updated at payment time instead of billing time. During dues billing, iMIS first checks the billing cycle, then the Set up general options window, to determine how to handle complimentary item Paid Thru dates.

Billing Type

Annual/Anniv – Drop-down list used to select when the billing cycle should be billed (Annual or Anniversary) or to retain the default setting. iMIS defaults to the setting specified on the Set up general options window. You may want to change the setting if you bill dues products annually and subscriptions by anniversary.

Cash/Accrual – Drop-down list used to select the accounting method of Cash or Accrual or to retain the default setting. iMIS defaults to the setting specified on the Set up general options window. You can select Cash or Accrual if the default accounting method on the Set up general options window is set to Accrual. If you try to set the billing cycle accounting method to Accrual when the dues product accounting method system default is Cash, iMIS displays a message informing you that the accounting method system setup must be changed to Accrual.

Bills/Reminders button

Opens the Billing and Reminder Notices window where you can specify when iMIS should send first and second reminder notices to the customers included in the billing run.

To set up a subscription billing cycle

1. From Billing, select Set up module> Billing cycles to open the Set up billing cycles window.
2. Click New.
3. Enter the name of the billing cycle in the Cycle Name field.
4. Select a form from the Forms drop-down list.
5. Select whom to bill:

- Select the customer types to bill from the Member Types column.
- Select the Categories to include for this billing cycle.

6. Select a SUB product from the Products scrolling list.
7. Click Save.

To run a non-dues billing

You can bill an individual member or run a mass billing based on a billing cycle.

1. If billing a customer:

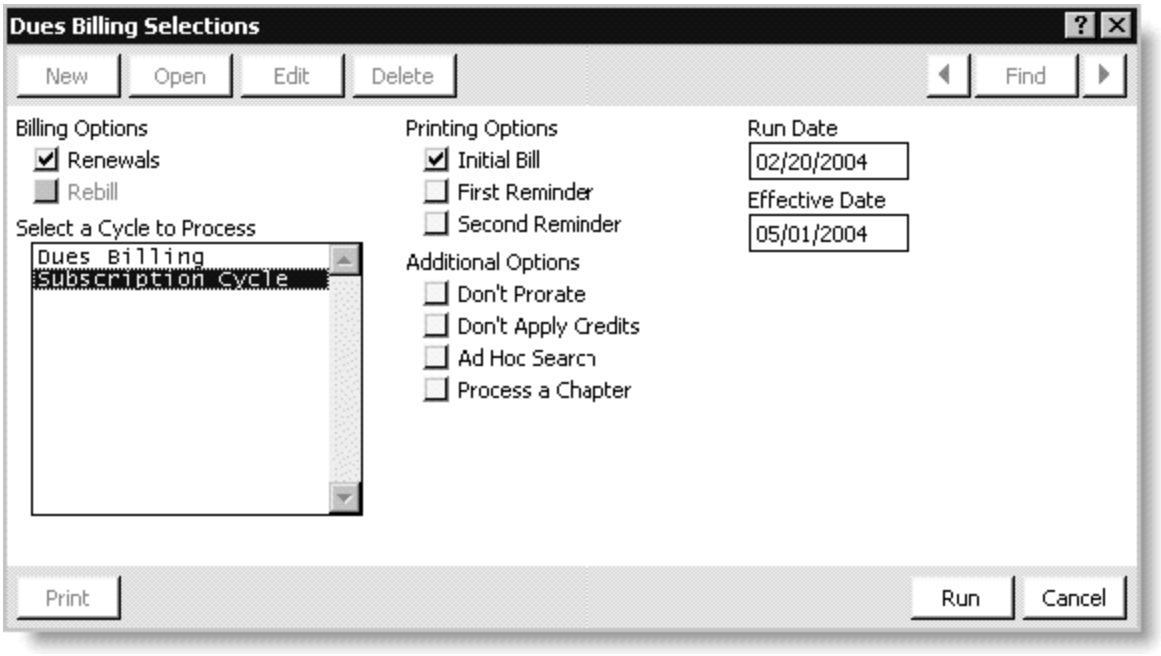
- From Customers, select Manage customers, find a customer, and then select the Billing tab, and then
- Click Create Invoice to display the Dues Billing Selections window and continue with the next step.

2. If billing for the cycle:

- From Billing, select Process billing to open the Process billing window. Continue with the next step.

3. Click New.
4. Select the Renewals options under Billing Options. The Effective Date field displays.
5. Select the Initial Bill option under Printing Options.
6. Select the cycle in the Select a Cycle to Process field.

7. Verify that the Effective Date is correct for the date range you are going to process.
8. Click Run to process the cycle and print the invoices.
9. From Customers, select Manage customers, find the customer record, and select the Billing tab.



Back Issues

Managing back issue requests involves setting up the BACKISSUE activity type on the Customer Management Set up activity types window, and entering and editing the back issue request using the Issues/Back Issue Requests window.

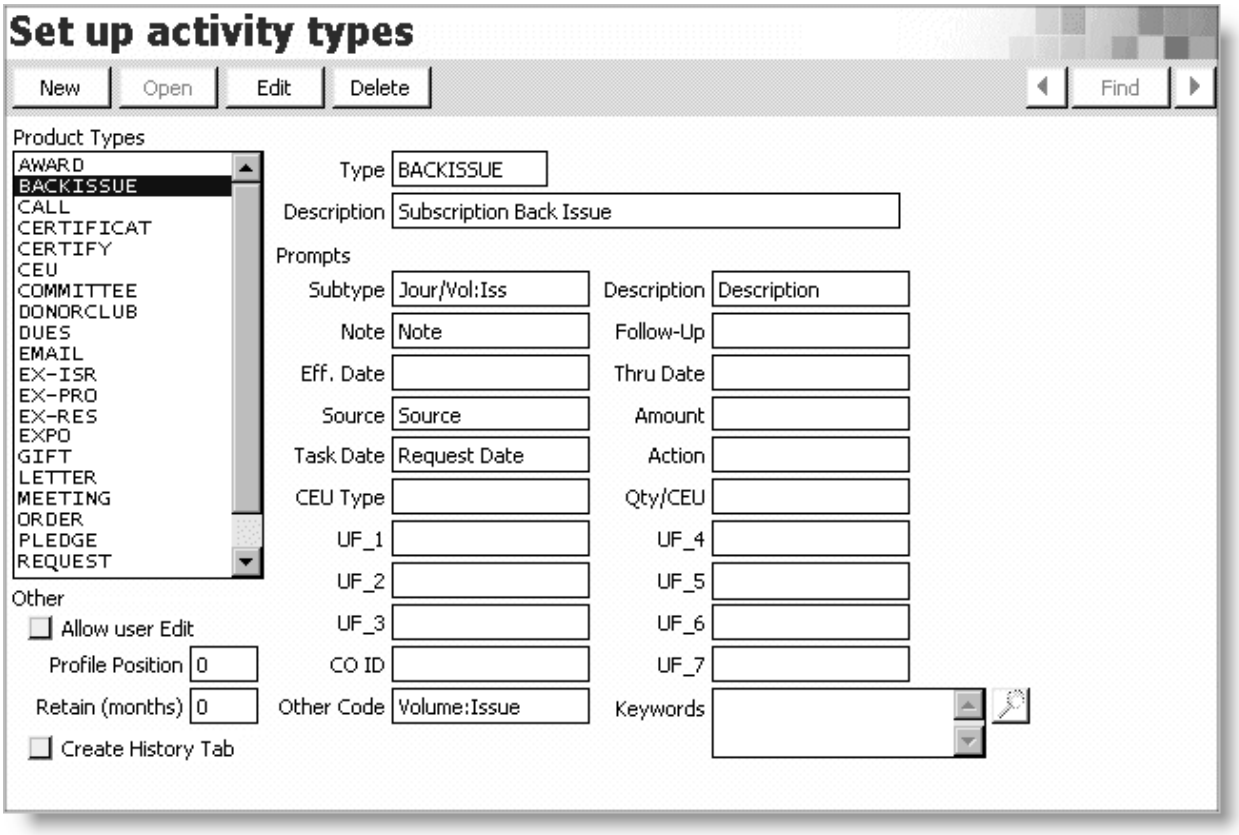
Defining the BACKISSUE Activity Type

Before you can enter a back issue request for a publication, you must create the BACKISSUE activity type on the Set up activity types window.

To define the BACKISSUE activity type

1. From Customers, select Set up module> Activity types to display the Set up activity types window.

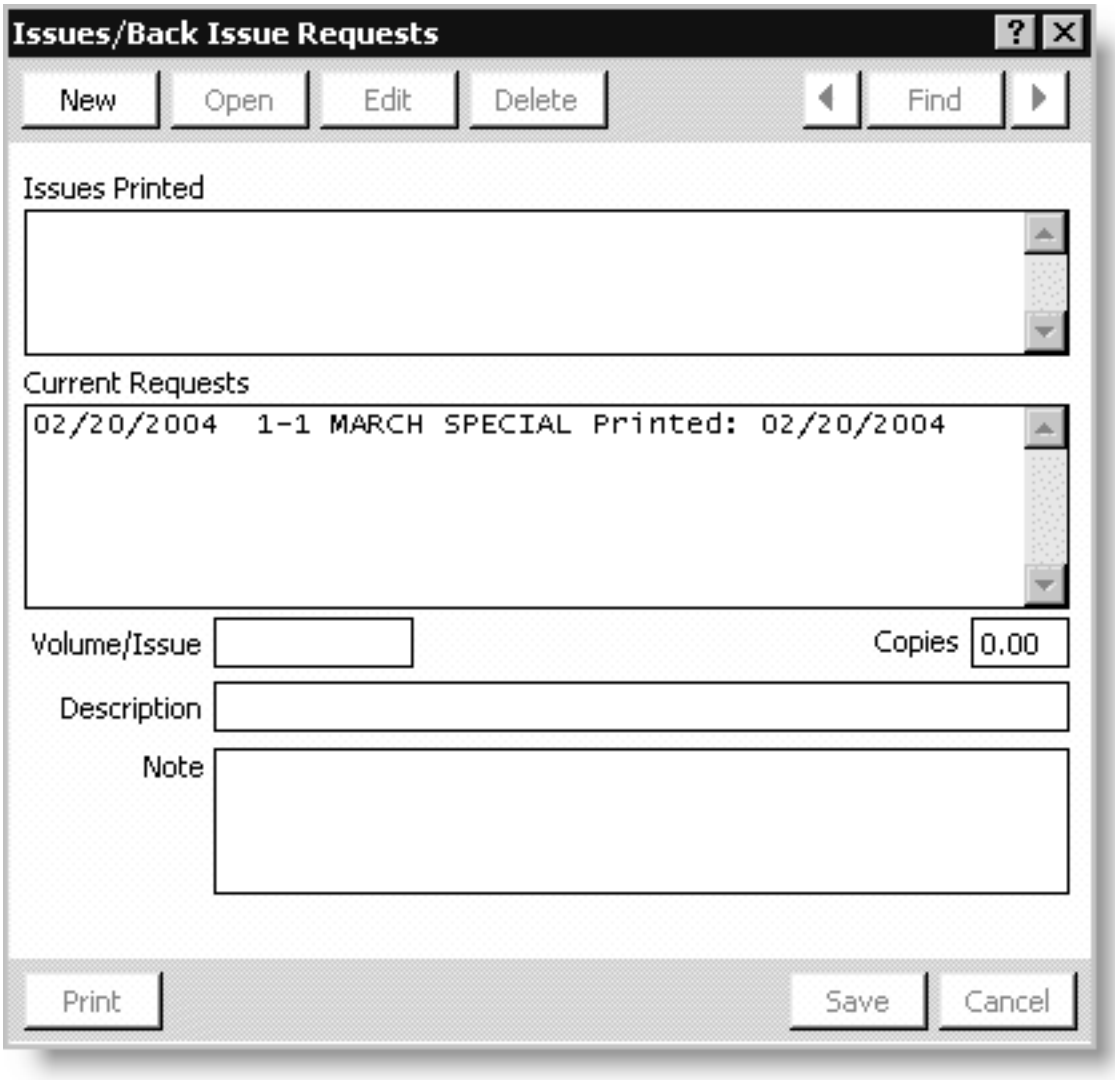
2. Click New.
3. Enter BACKISSUE in the Type field.
4. Enter a Description for the activity.
5. Enter a prompt for Subtype.
6. Enter a prompt for Description.
7. Enter a prompt for Note.
8. Enter a prompt for Source.
9. Enter a prompt for Task Date.
10. Enter a prompt for Other Code.
11. Click Save to display the Set up activity types window.



Managing Back Issue Requests

Once you have created the BACKISSUE activity type, you can enter and manage back issue requests.

Issues/Back Issue Requests window



From Customers, select Manage customers, find customer record, select the Billing tab, double-click SUB item, and click Back Issues

Issues Printed

List of requests for which Issue Labels have been printed

Current Requests

List of requests for Back Issue Labels (updated with Printed: MM/DD/YYY after labels have been printed)

Volume/Issue

Specifies the PUB volume/issue number requested

Copies

Specifies the number of copies requested

Description

(optional) Specifies a description.

Note

(optional) Specifies a note.

To enter a back issue request

1. From Customers, select Manage customers, find a customer record, and select the Billing tab.
2. Double-click the subscription item to open the Dues/Subscription Item Detail window.
3. Click Back Issues to open the Issues/Back Issue Requests window.
4. Click New.
5. Place the cursor in the Volume/Issue field and enter the volume and issue the member is requesting.
6. Enter the number of Copies.
7. (optional) Enter a Description.
8. (optional) Enter a Note.
9. Click Save to update the record
10. Click New to continue to enter back issue requests.

To edit a back issue request

1. From Customers, select Manage customers, find a customer record, and select the Billing tab.
2. Double-click the subscription item to open the Dues/Subscription Item Detail window.
3. Click Back Issues to open the Issues/Back Issue Requests window.
4. Select the line item to edit from the Current Requests list.
5. Click Edit.
6. Make your changes.
7. Click Save to update the record.
8. Edit additional requests as necessary.

To delete a back issue request

1. From Customers, select Manage customers, find a customer record, and select the Billing tab.
2. Double-click the subscription item to open the Dues/Subscription Item Detail window.
3. Click Back Issues to open the Issues/Back Issue Requests window.
4. Select the line item to delete from the Current Requests list.
5. Click Delete.
6. A message displays asking you to confirm the deletion. Click Yes.

Label Generation

The main purpose of iMIS Subscription Fulfillment is to create mailing labels and appropriate audit trail for large mailings (usually 5,000 or more pieces) similar to the USPS second-class mailing standards.

The Subscription Fulfillment system is capable of printing mailing labels in several different sort orders:

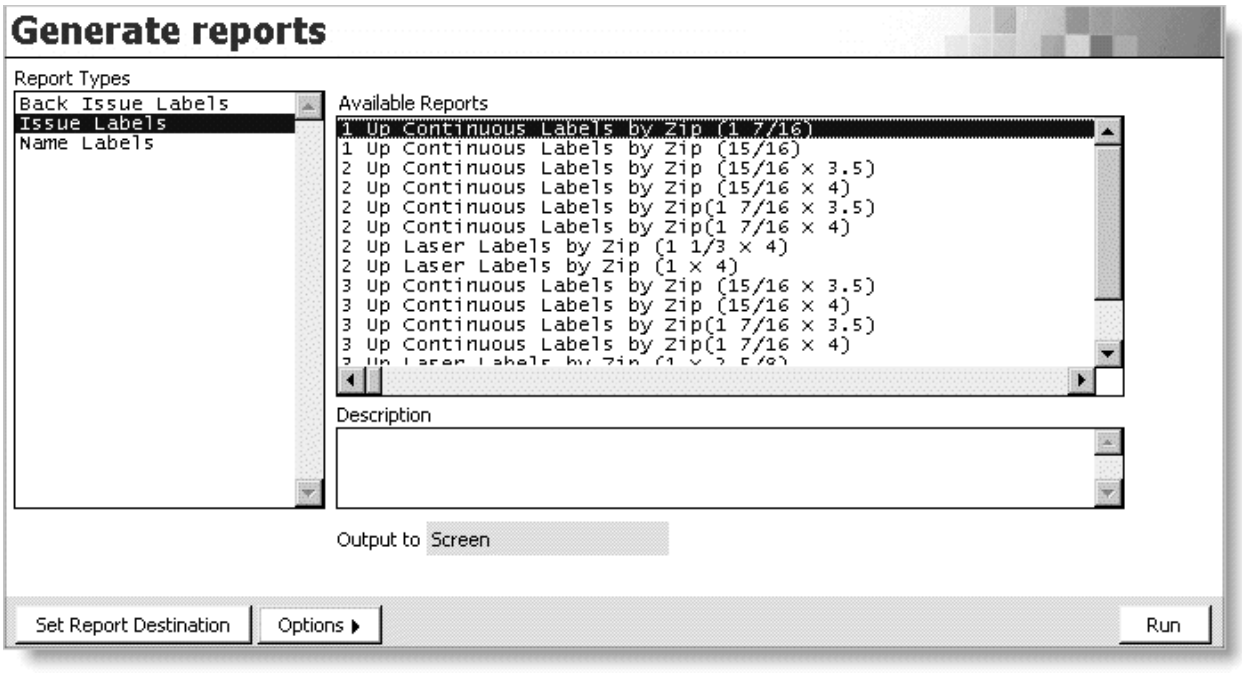
- Carrier route sorts
- 5-digit direct
- 3-digit direct
- State
- Mixed state
- Foreign
- Special mail codes
- Multi-copy
- Other reports include:
- Edition analysis
- 5-digit summary
- 3-digit summary
- Zone analysis

Using the Generate reports Window

This section describes the Generate reports window and other secondary report windows. For all report types, the Subscription Selection window opens when you run the report. This selection window allows you to specify the subset of data that you want to include in the output results. Depending on the options you select, a secondary window allows you to select subscribers.

Note: The settings that determine the features of the label print runs are based on the Subscriptions table.

Generate reports window



From Subscriptions, select Generate reports

Report Types

Lists the available report types.

Note: For printing 1 Up labels from a locally installed printer, iMIS supports the Crystal label format, 1 Up Continuous Labels - 1 1/8 by 3 1/2 (Crystal) for the Dymo 400 Turbo Label number 30572.

Available Reports

Lists the reports available for each report type.

Description

Provides a description of the selected report.

Set Report Destination button

Used to select the output device for your report, and to select a device for printing individual address labels. Printer is the default destination option. However, once you select another destination option and click Save, that option becomes the default report des-

tination. The report destination defaults to the last destination selected and saved each time iMIS is launched.

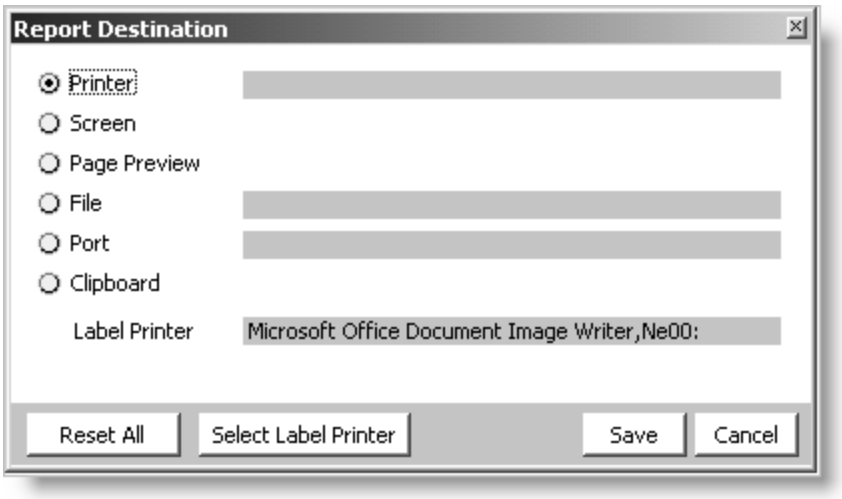
When you select Printer as your default destination, iMIS stores the path to your default printer in the database. If you do not want iMIS to store this information (for example, if you access iMIS through a Terminal Server or Citrix connection that may append a network identifier to the path to your default printer, causing iMIS to designate your printer setting as invalid), you can select the Do not retain printer destination (Terminal Server environments) option on the System Setup window (select File> System Setup). When you enable this option, iMIS does not save the path to your default printer destination to the database. You will still be able to print to your default printer when you select the Printer option on the Report Destination window. If when starting a subsequent session iMIS detects a conflict with your printer setting (for example, if you select a different default printer), an error message will display and you will be able to select a valid printer. You can also click the Reset All button to clear any existing report destination values.

Note: You must have a default printer specified on your workstation to access the Print Setup (select File> Print Setup) and Report Destination window.

If you select the File report destination option, every time you restart iMIS the system recreates that file. If you have a previously existing instance of that file still in the path location, then a message displays asking if you want to overwrite the file. Click Yes to overwrite the file, or click No to rename the file. If you have moved or deleted the file from the previous export, then it creates the file again as a 0 KB file in preparation for the next export.

Note: Set the report destination to Screen to avoid the unnecessary printing of reports.

Note: The label printer destination is for printing individual address labels only, and is independent of the overall report destination.



Note: To print the report, select the Printer option rather than printing the report from the screen. The printed reports will not align exactly as they appear on the screen if you print them from the screen; printing from the Printer option will prevent this problem.

Note: The label printer destination only works from the address section of the manage customers window.

Options button

Opens a list of options for the selected report. This list includes report output formats for printing, exporting, saving, and sorting. Some options may not be available for all Available Reports.

Run button

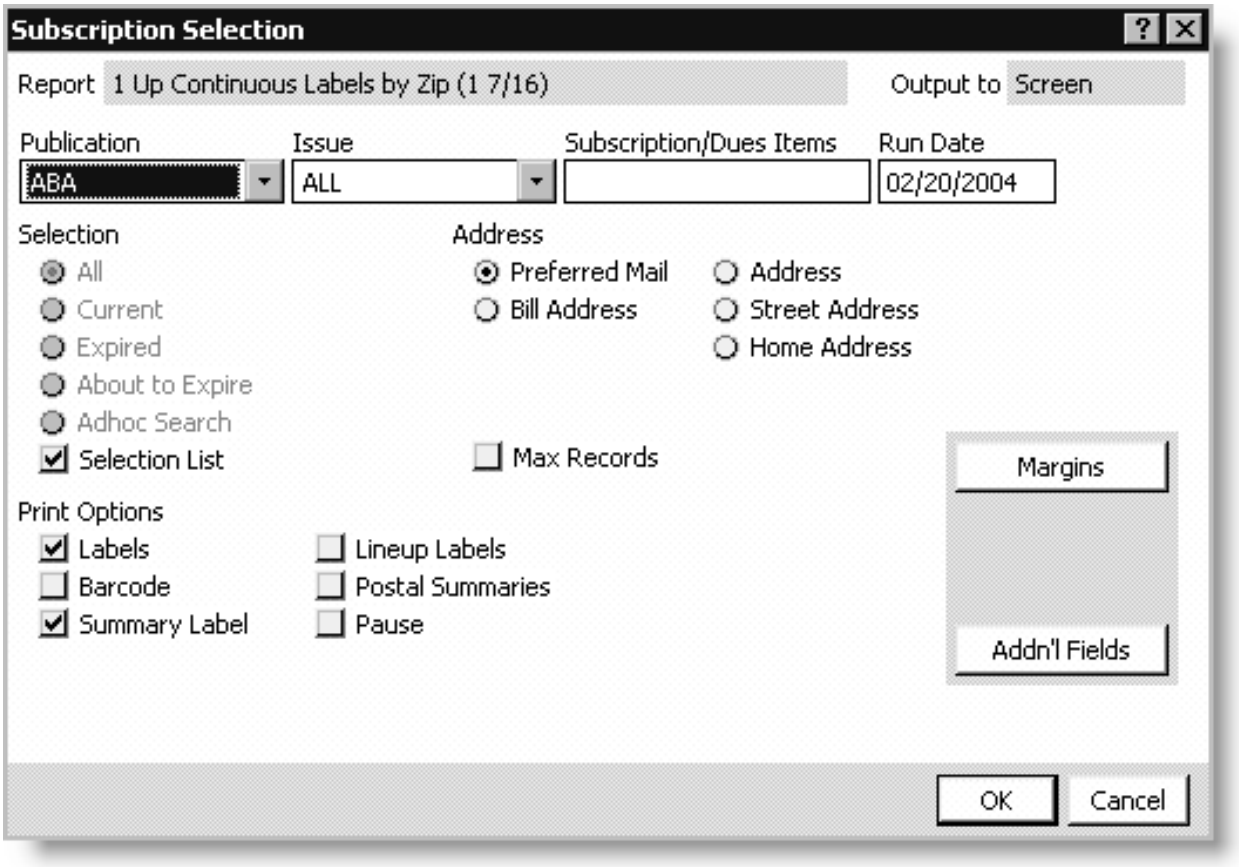
Used to generate the output produced from your search, format, and content choices.

Selection windows for subscriptions and subscribers

The Subscription Selection window opens when you select a report and click Run. From this window you can select a specific issue, created in the Set up subscriptions window (from Subscriptions, select Set up tables > Subscriptions), or select Subscription/Dues items that will be associated with the publication specified. For example, you could specify a magazine, JOUR, that no one subscribes to directly and then enter the name of the Dues/Subscription product that will be associated with users who will receive the JOUR

publication, for example, BASIC. You can enter multiple subscriptions by separating them with commas (no spaces).

Subscription Selection window



From Subscriptions, select Generate reports, select the Issue Labels report type, select the label report, and click Run

Publication

(required) Drop-down list of available SUB items

Issues

(optional) Drop-down list of available PUB items associated with the SUB item

Subscription/Dues Items

(optional) Specifies the subscription code to be associated with the publication.

Run Date

Defaults to system date.

Selection

All – Enable to select all records with the current Publication dues item

Current – Opens an Effective Date field

Expired – Opens an Effective Date field

About to Expire – Opens an Effective Date field

Adhoc Search – Opens the Select Search Instructions window

Selection List – Opens the Subscriber Selection window

Address

Preferred Mail – Enable to create labels with the preferred mailing address

Preferred Bill – Enable to create labels with the preferred billing address

Address – Enable to create labels with the first address in the Name_Address table

Street Address – Enable to create labels with the second address in the Name_Address table

Home Address – Enable to create labels with the third address in the Name_Address table

Max Records

Select this option to open a field that allows you to enter the maximum number of records to be created for this label run

Print Options

Labels –Must be enabled to print labels

Barcode – Enable to print a bar code on the label. (Name.BAR_CODE must be populated)

Summary Labels – Enable to display an End Label Run summary with the name of the label processed, date, time, user name, and total labels printed for total records selected.

Lineup Labels – Enable to display Begin Label Run line up labels used to align the label with the printer.

Postal Summaries – Enable to display postal reports. The reports displayed are dependent on the options chosen in the Subscription Information window.

Pause - Enable to display the message “Label printing complete. Press OK to continue.” This option is used in conjunction with Postal Summaries and will pause the printing of the Postal Summaries until you press OK.

Margins button

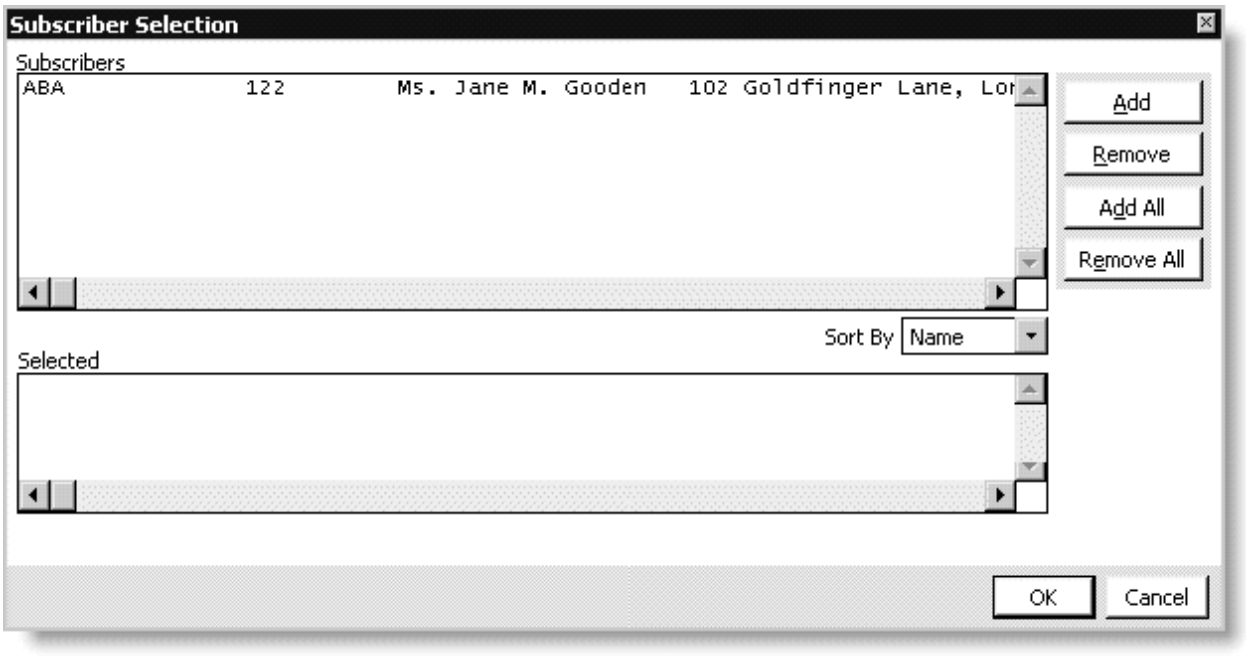
Opens the Margins/Page Layout window that allows you to specify the layout settings for your labels.

Addn’l Fields button

Opens the Additional Fields window where you can select additional fields to print on the labels. The additional fields will print for this label run only.

The Subscriber Selection window displays when you select the Selection List option on the Subscription Selection window. This window allows you to specify the subscribers to be included in the output results.

Subscriber Selection window



From Subscriptions, select Generate reports, choose report, click Run, enable Selection List, and click OK

Subscribers

Displays subscribers based on the selection criteria, for example, ALL Issues

Add button

Used to move Subscribers to Selected

Remove button

Used to remove line items selected under Selected to Subscribers

Add All button

Used to adds all line items under Subscribers to Selected

Remove All button

Used to remove all line items under Selected to Subscribers

Sort by

Name – Select this value to sort subscribers by last name

ID – Select this value to sort subscribers by ID

Sub – Select this value to sort subscribers by subscription when more than one subscription item is entered in Subscription/Dues Items field on the Subscription Selection window

Selected

Lists subscribers for which labels will be printed

To run a subscription label report

1. From Subscriptions, select Generate repots,
2. Select a report type, choose a label report, and click Run to display the Subscription Selection window.
3. If running labels for:

- A current publication and issue, select the Publication and Issue from the appropriate drop-down list.
- A group of members based on a particular Subscription/Dues item, enter the product code(s) in Subscription/Dues Items.

4. Select the Selection List option as needed.

- When processing Back Issue Labels, the Selection List option is automatically enabled and the only one available.
- When processing Issue Labels, all options are available.

5. Enable the appropriate Address option.
6. (optional) Select the Max Records option and enter the maximum number of labels to print.
7. Select the appropriate Print Options.
8. If you selected the Selection List option, click OK to open the Subscriber Selection window. Otherwise, continue to the next step.

- Select the subscriber(s) for whom you want to print labels by selecting the appropriate button to move the subscriber(s) from the Subscribers list to the Selected list.

9. Click OK to run the label report.

Modifying Subscription Label Reports

You can copy and make certain changes to the appearance of the report output. For example, you can customize the top line in the label run. In the following example, you need to select both the Use Multi-Level Postal Sorts and Use Carrier Route Sort fields on the Subscription Information window (from Billing, select Set up module> Products, select a product of type SUB, and click Subscription Info).

To modify subscription labels

1. Select Utilities > Report Specs to open the Report Specifications window.
2. Select the label report to modify.
3. Click Clone.
4. Tab to the Title field and modify the name of the report.
5. Click Parameters. The Detail Report Parameters window opens.
6. Click Options.
7. Select Additional Fields.
8. Press Ctrl-Z to open the window and add the following:

   jst(Name.ID,10,RV.SubCRRT,8,RV.SubLabelMark,1)

9. Click OK on the Additional Fields window.
10. Click Save on the Detail Report Parameters window.
11. Close the windows.
12. The following will print on the labels:

- ID, left-adjusted for 10 positions
- CRRT, from Name_Address for 8 positions
- ###, which is hard-coded as the SubLabelMark

  Note. The format spacing can be changed, but be sure to use the field names RV.SubCRRT and RV.SubLabelMark exactly as spelled.

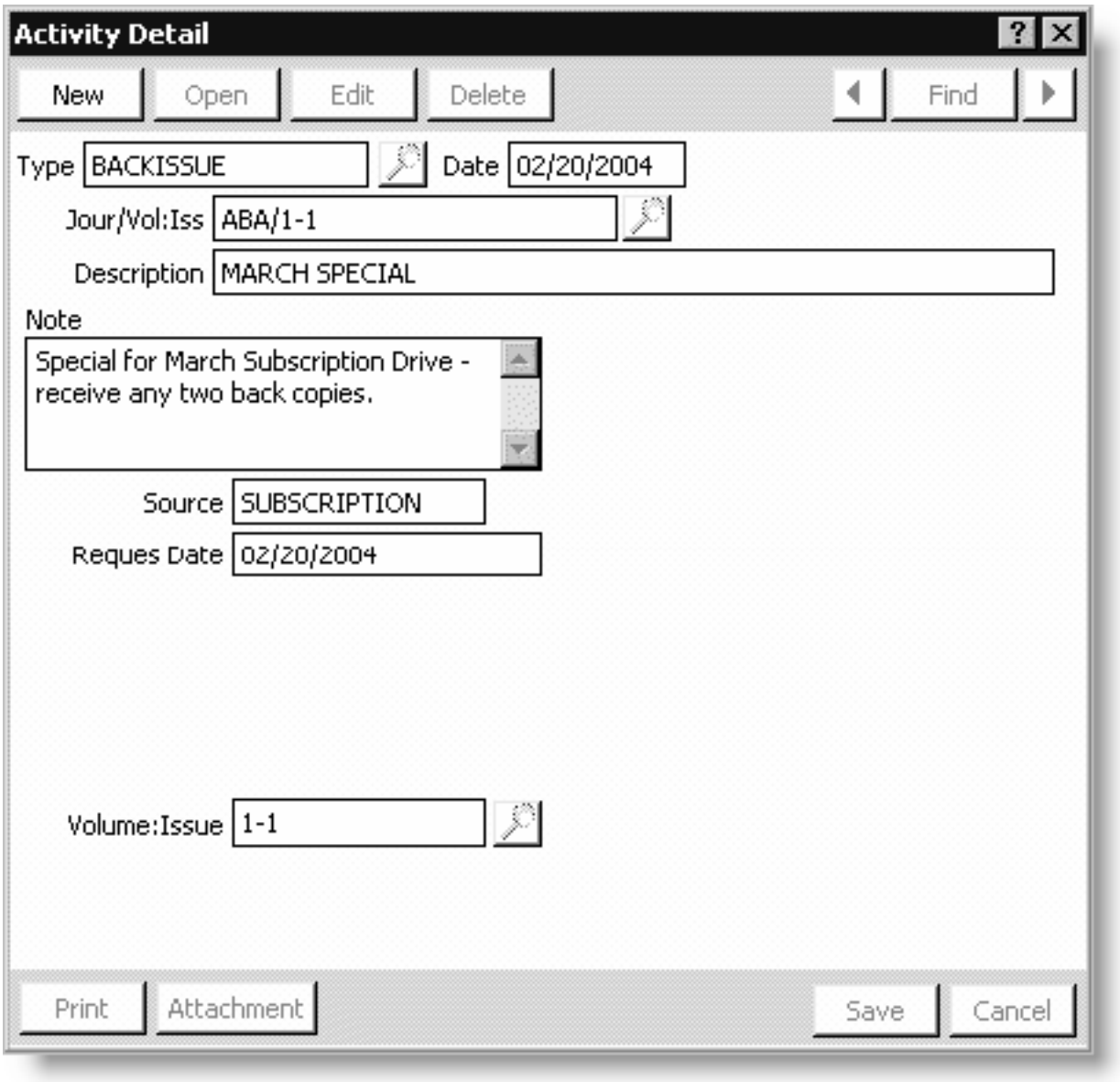
  Note: RV stands for report variable.

Printing Back Issue Labels

You can only print back issue labels once for each journal, volume, or issue. When requesting back issues, you must use the Subscriber Selection window.

The Subscriber Selection window is populated based on the BACKISSUE activity. The field TICKLER_DATE in the Activity table is populated when a back issue is requested (from the Billing tab, double-click the SUB item, and click Back Issues). After back labels are requested, the field is cleared.

Activity Detail window – BACKISSUE



From Customers, select Manage customers, find a customer record, select the Activity tab, and double-click BACKISSUE activity

To issue back labels

1. From Subscriptions, select Generate reports to open the Generate reports window.
2. Select Back Issue Labels from the Report Types area.
3. Select a label report.
4. Click Run to display the Subscription Selection window.

5. Select the Publication.
6. Select the Issue.
7. Select the Selection List option.
8. Enable the Address option.
9. Select the appropriate Print Options.
10. Click OK to display the Subscriber Selection window:

    Note: If using the Selection List option, and there are no customers with an active BACKISSUE activity, a message displays informing you that no subscribers found using the current selection options.
11. Click Add All to add all the customers under Subscribers to Selected.
12. Click OK to display a message that states that the label printing is complete.
13. Click OK to display the 3 Digit Zip Code Analysis report:
14. Close this report to display the 5 Digit Zip Code Analysis report:
15. Close this report to display the Edition Size report. This report will show the number of copies requested, as well as the Zone Code and Mail Code, if specified.
16. Close this report to display the labels. The Begin Label Run labels are the Lineup Labels. The label has a Barcode. The subscription code and issue number print above the name. The End Label Run is the Summary Label.

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 3:01 PM(MANAGER)
******** Begin Label Run ********

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 3:01 PM(MANAGER)
******** Begin Label Run ********

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 3:01 PM(MANAGER)
******** Begin Label Run ********

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 3:01 PM(MANAGER)
******** Begin Label Run ********

ABA Iss: 1-1
Mr. Charles P. Better, LLM
Sales Manager
Software Distributors
123 Computer Avenue
Dallas, TX 75555-5432

******** End Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 11:13 AM(MANAGER)
1 Labels Printed for 1 Records Selected
******** End Label Run ********

The BACKISSUE activity record updates after you perform a label run.

- The Description field updates with Printed: MM/DD/YYYY.
- The Request Date (task date) field will become blank.

The Issues/Back Issue Requests window updates with the Printed: MM/DD/YYYY information.

Printing Issue Labels

Use the Issue Labels reports to print labels for current issue requests or to create labels for a publication that has not been billed to each member. All of the selections are available when printing issue labels.

The Subscriber Selection window is populated based on either the publication chosen or the Subscription/Dues items entered.

To print issue labels

1. From Subscriptions, select Generate reports, select the Issue Labels report type, choose a label report, and click Run to display the Subscription Selection window.
2. If running labels for:

- A current publication and issue, select the Publication and Issue from the appropriate drop-down list.
- A group of members based on a particular Subscription/Dues item, enter the product code(s) in Subscription/Dues Items.

3. Select the Selection List option.
4. Enable the Address option.
5. Select the appropriate Print Options.
6. Click OK to display the Subscriber Selection window.
7. Click Add All to add all the members under Subscribers to Selected
8. Click OK to display a message that states that the label printing is complete.

9. Click OK to display the 3 Digit Zip Code Analysis report.
10. Close this report to display the 5 Digit Zip Code Anaylsis report.
11. Close this report to display the Edition Size report. This report will show the number of copies requested as well as the Zone Code and Mail Code, if specified.
12. Close this report to display the labels. The Begin Label Run labels are the Lineup Labels. The label has a Barcode. The End Label Run is the Summary Label.

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 12:50 PM(MANAGER)
******** Begin Label Run ********

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 12:50 PM(MANAGER)
******** Begin Label Run ********

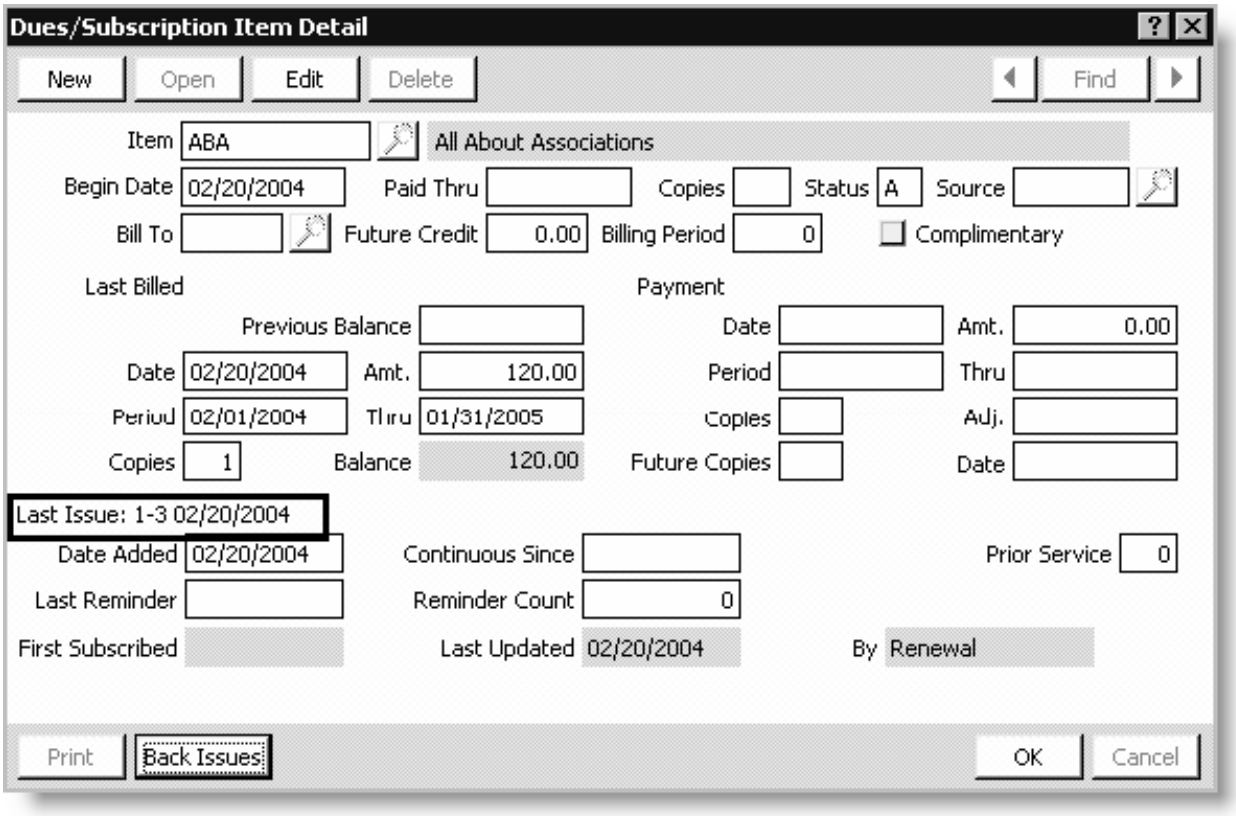
******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 12:50 PM(MANAGER)
******** Begin Label Run ********

******** Begin Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 12:50 PM(MANAGER)
******** Begin Label Run ********

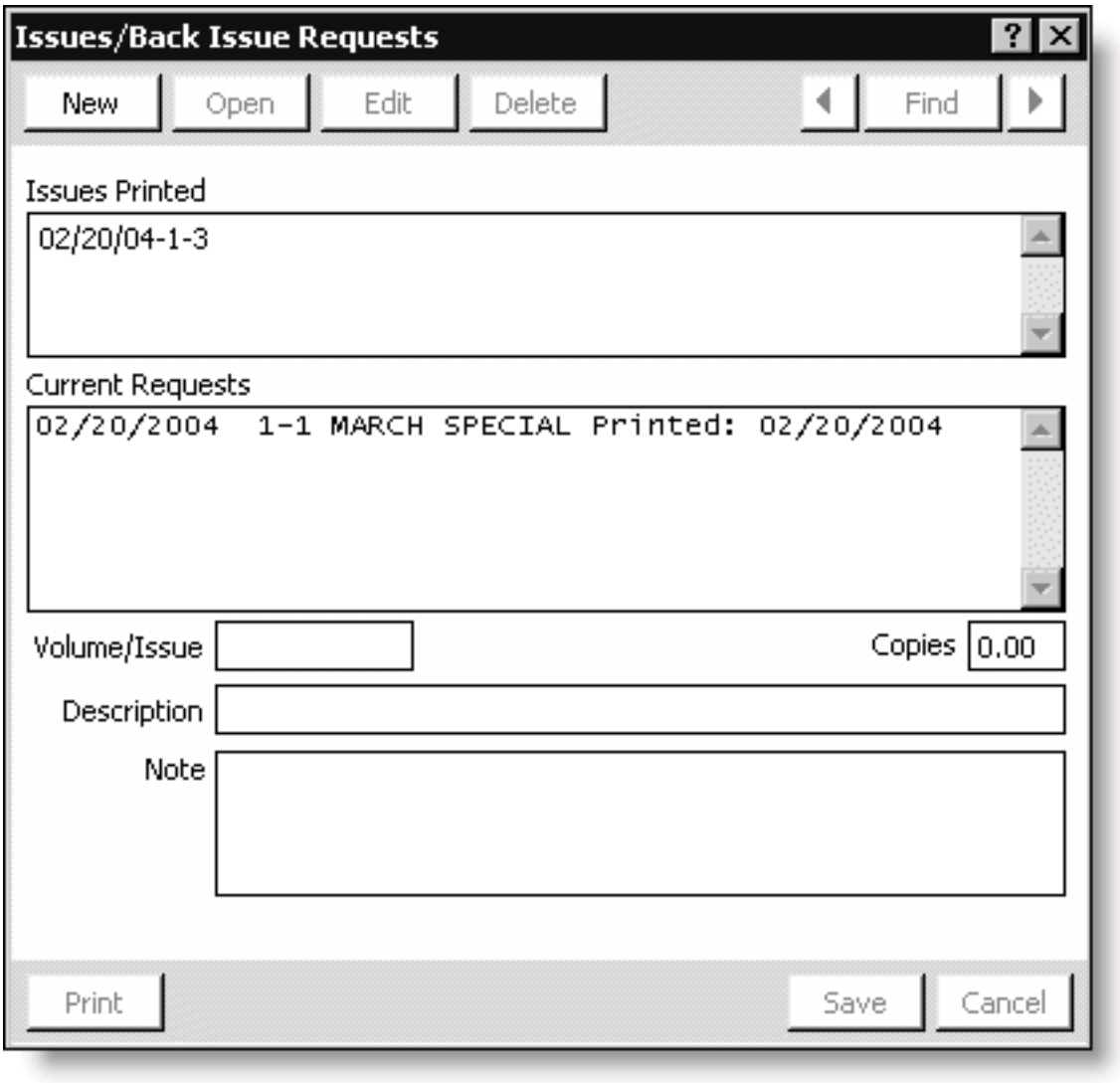
Mr. Charles P. Better, LLM
Sales Manager
Software Distributors
123 Computer Avenue
Dallas, TX 75555-5432

******** End Label Run ********
1 Up Continuous Labels by Zip (1 7/16)
02/13/2001 12:50 PM(MANAGER)
1 Labels Printed for 1 Records Selected
******** End Label Run ********

The Dues/Subscription Item Detail window displays the Last Issue: number and print date. (This field is stored in Activity.ISSUE_PRINT).



The Issues/Back Issue Requests window Issues Printed field will be updated with MM/DD/YY-Volume/Issue.



Printing Bag Tags

You can use any of the Issue Labels reports to print bag tags. Before you can print labels for a bag tag, you must define the ZIP3 general lookup/validation table and import 3-digit ZIP code values, and specify your publication on the Subscription Selection window. See Importing Values into the Zip3 Table for information about how to defining the ZIP3 general lookup/validation table.

To print a bag tag

1. From Billing, select Set up module> Products to open the Set up products window.

2. Select a product of type SUB. The Subscription Info button displays.
3. Click Edit.
4. Click Subscription Info.
5. Select the Carrier Route Sort and Print Bag Tags options.
6. Enter free form text in Bag Tags Line 2 and Bag Tags Line 3.
7. Click Save.
8. From Subscriptions, select Generate reports to open the Generate reports window.
9. Select the Issue Labels report type.
10. Select a label report.
11. Click Run.
12. Select the Publication and click OK.

Subscriptions Table Maintenance

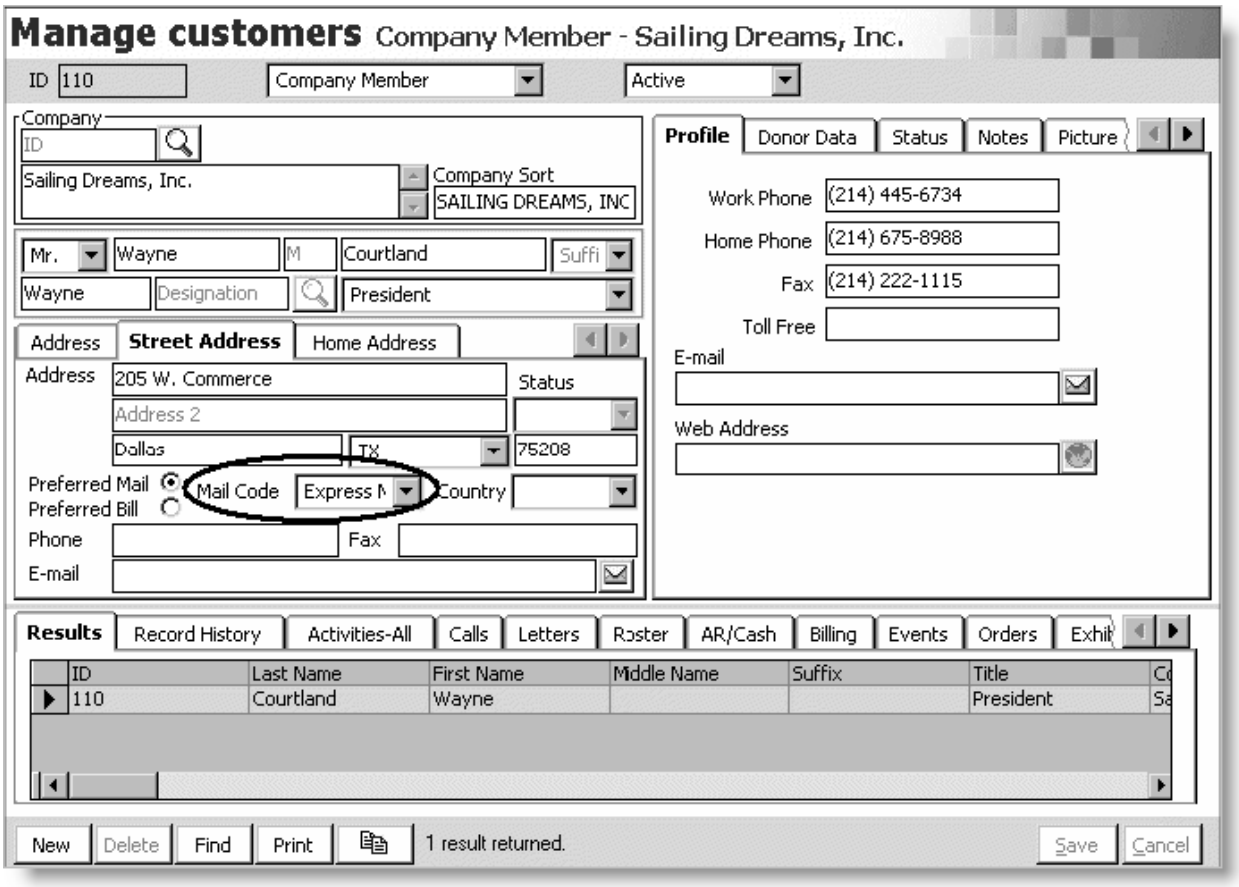
For iMIS Subscription Fulfillment, you need to set up the following tables:

- MAIL_CODE table
- Zone table
- 3-digit ZIP table (ZIP3)

Defining Mail Codes

On the Manage customers window you can associate a mail code with a customer's address. The Mail Code field is an optional, special-purpose field that comes into play for bulk mailings, such as subscription mailing. The field provides special groupings within a mailing. The Mail Code field allows a higher-level sort for ZIP-sorted labels and printouts. With this feature, you can segregate all first-class mail recipients at the end of a label run by giving the first-class records a consistent mail code, while leaving the regular mail records uncoded.

The Mail Code field displays on the Manage customers window once you create the MAIL_CODE general lookup/validation table. You can specify how the field displays by enabling an Address Code on the Customer Setup – Address and Notes window (from Customers, select Set up module> General, and click Address and Notes). The Mail Code field displays on the main address tab only when you enable the Single Mail Code option and on all three primary address tabs when you enable the Multiple Mail Codes option.



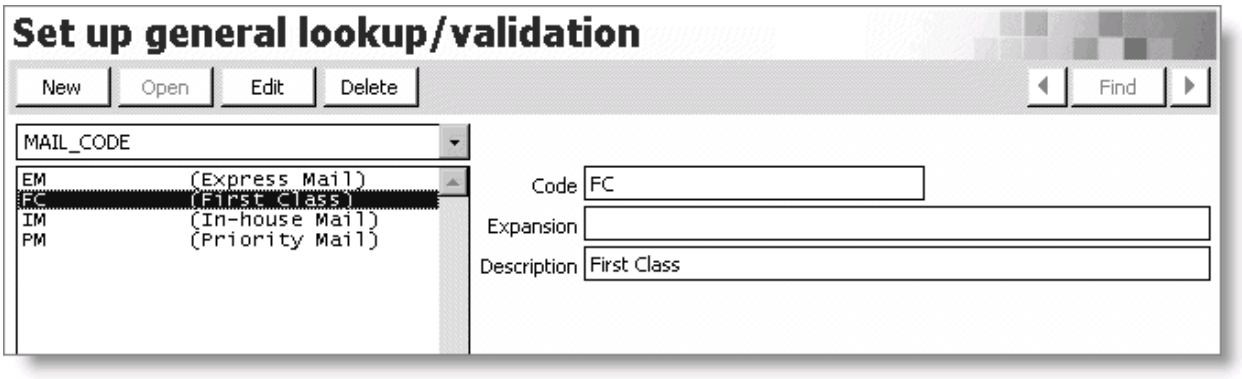
Sample customer record with Mail Code field

To define the MAIL_CODE lookup table

Before you can associate a mail code with a customer's address, you need to create the MAIL_CODE general lookup/validation table.

1. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Select (New Table) from the list of available tables.
3. Enter the name of the new table in the space provided.
4. Click Save.
5. Click New.
6. Enter a Code.

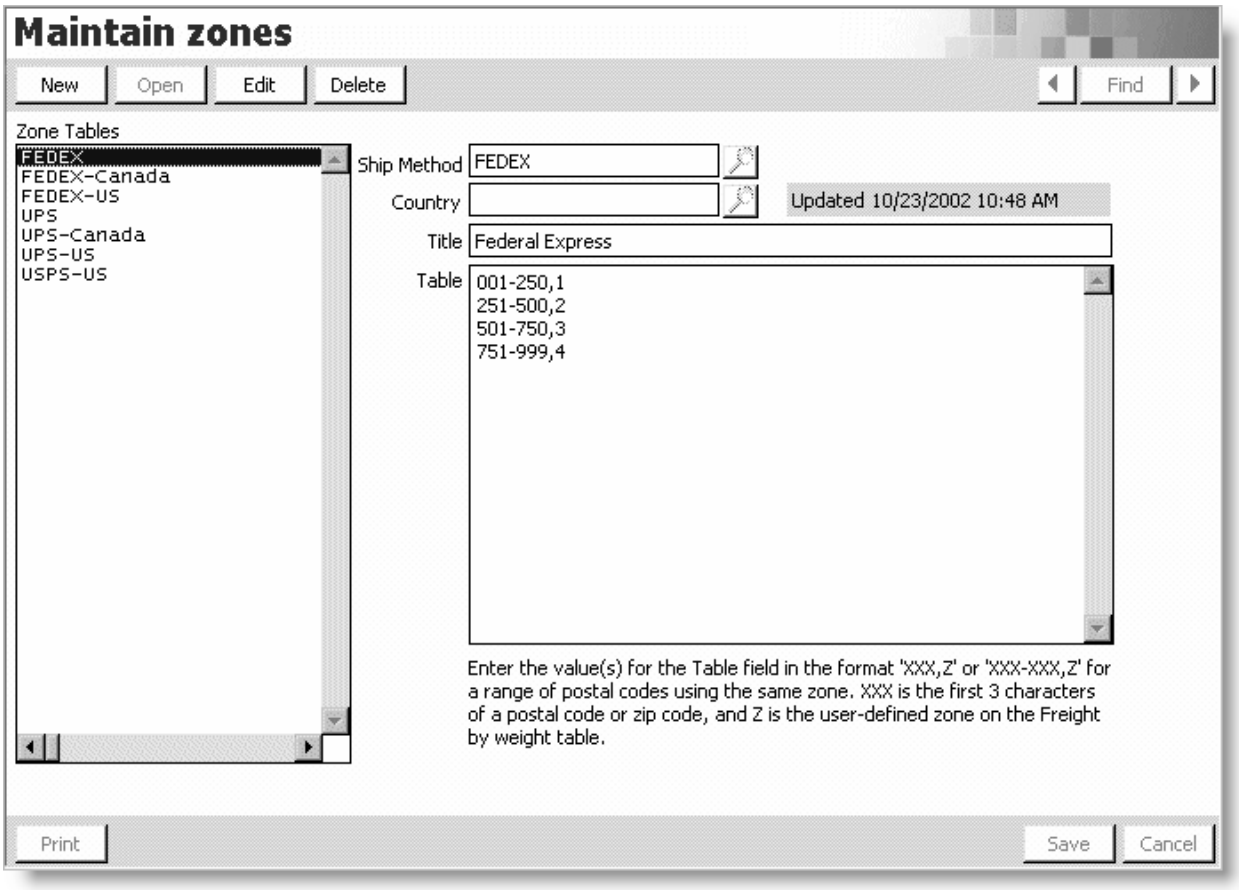
   Note: Make sure the Code you specify for a mail code does not exceed the maximum field length for the MAIL_CODE field (5 characters). If the length of the Code field is greater than the defined field length, the value will not display in the drop-down as an available option.
7. (optional) Enter a Description.
8. Click Save.
9. Repeat the process to enter additional codes.



Defining Zone Tables

You can use zone tables to measure the distance from the shipping location to the destination. If the client ships from multiple locations, you will need to define a zone table for each location.

Maintain zones window



From Subscriptions, select Set up tables > Maintain zones

Zone Tables

List of available Zone tables

Ship Method

Specifies a form of transport or any carrier that you use to ship your orders. You can use the lookup icon to select a shipping method when you have created the SHIP_METHOD general lookup/validation table and defined shipping zones.

Country

Specifies a country for the zone, or use the lookup icon to select a country. You define countries on the Set up country names window (from Customers, select Set up tables > Country names).

Title

Specifies a descriptive title of the zone table.

Table

Specifies the ZIP code and zone information the zone table contains.

To define a zone table

1. From Subscriptions, select Set up tables > Maintain zones to open the Maintain zones window.
2. Click New.
3. Enter the Ship Method of the zone table you are defining, or click the Find icon to select a value.
4. Enter the Country for the zone, or click the Find icon to select a country.
5. Enter the Title of the zone table.
6. Enter the shipping zone information for the zone table in the Table field. The table format for defining zones is XXX,Z or XXX-XXX,Z, where XXX is the first three characters of a postal code, and Z is a user-defined zone.
7. Click Save.

Importing Values into the Zip3 Table

ZIP3 is an optional table used to create bag tags. ASI supplies a ZIP3 tab-delimited file to import into the ZIP3 table along with the BCP commands, but you are free to use your own. The only requirements are that the file be tab delimited and contain a Code, Expansion, and Description.

To import a file into the ZIP3 general lookup/validation table

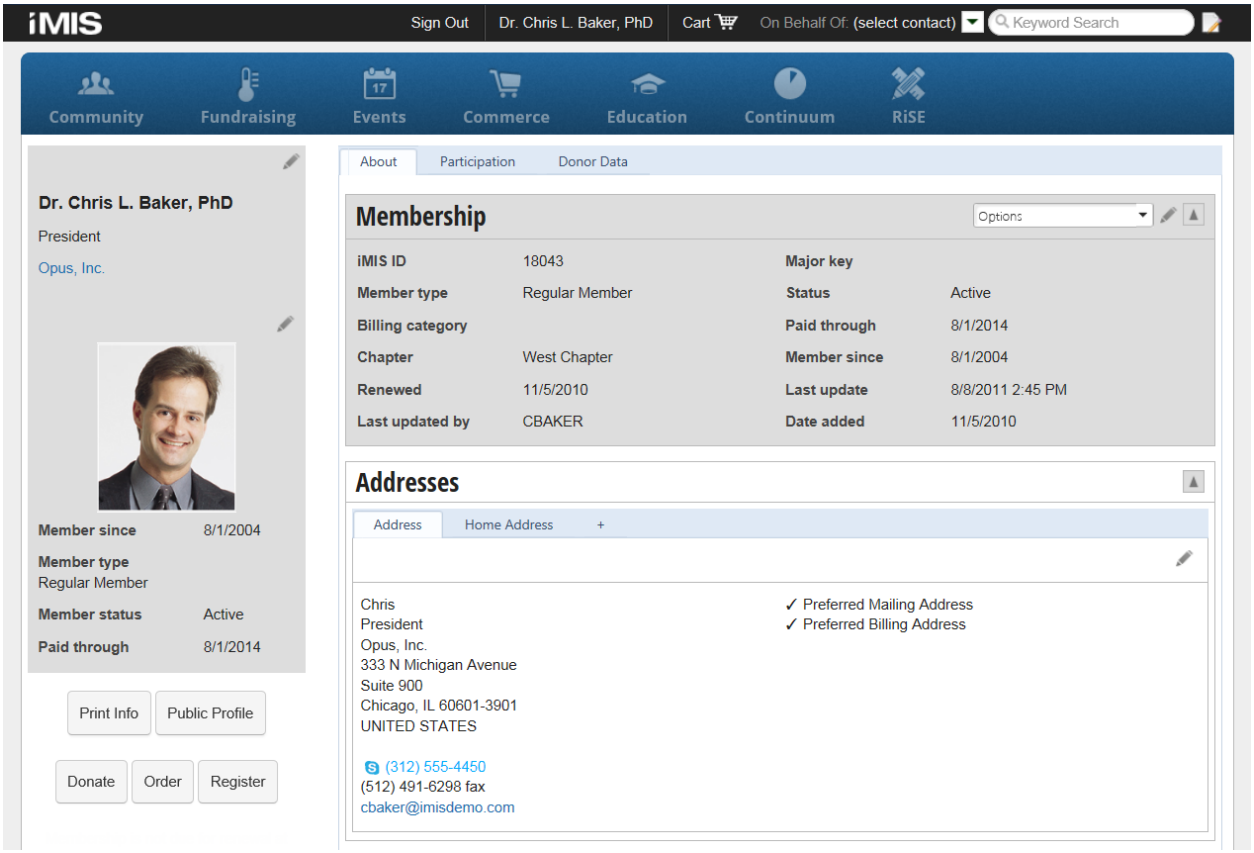
1. From Customers, select Set up tables > General lookup/validation to open the Set up general lookup/validation window.
2. Select New Table from the bottom of the drop-down table list.
3. Enter ZIP3 in the space provided.

4. Click Save.
5. Select Import to display the Importing Tab Delimited Tables... window.
6. Click Continue to display the Select import file box.
7. Navigate to your import file, and click Open.
8. When the import is complete, a message displays asking if you want to select an additional file.

- Click No to end the import process.
- Click Yes to import another tab file.

Support Services

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



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

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

Where to go next

Technical Support

ASI's Technical Support team is a three-time winner of Service and Support Professionals Association's (SSPA) Software Technical Assistance Recognition (STAR) Award and Support Center Practices (SCP) Certification. SCP Certification measures the effectiveness of customer support based on a stringent set of performance standards and represents best practices for the industry.

Technical Support is available to all iMIS customers who are current on their iMIS Software Update Plan (SUP).

You can receive live technical support via the web or telephone, Monday through Friday, during standard business hours. You can submit, monitor, review, and update a technical support request via the web 24 hours a day, 7 days a week. You can also search a database of previously resolved technical issues.

Hours of Operation

North America

Technical Support is available Monday through Thursday from 8:00 a.m. to 7:00 p.m. (CST) and on Friday from 8:00 a.m. to 5:00 p.m. (CST). (512) 491-0550 ext 2

Online resources are available 24 hours a day. Questions submitted after end of business will be addressed during working hours the next business day. Service is not available during company holidays:

- New Year's Day, 1 January
- Memorial Day
- Independence Day, 4 July
- Labor Day
- Thanksgiving Day
- Day after Thanksgiving Day

- Christmas Eve, 24 December
- Christmas Day, 25 December

Also, service is not available one day per quarter to accommodate internal planning sessions; specific dates and times of these sessions are announced in the monthly newsletter available on the Tech Support Community and posted on the Technical Support web page prior to the date of the session.

Asia-Pacific

Technical Support is available Monday through Friday from 9:00 to 17:00. (Australian Eastern Standard Time) Dial extension 2 for Customer Support. +61 3 9869 7500

Online resources are available 24 hours a day.

Holidays for Asia-Pacific include:

- New Year's Day, 1 January
- Australia Day
- Labour Day (VIC)
- Good Friday
- Easter Monday
- Anzac Day
- Queen's Birthday
- Bank Holiday (NSW)
- Labour Day (NSW)
- Melbourne Cup Day (VIC)
- Christmas Day, 25 December
- Boxing Day, 26 December

Europe

Online resources are available 24 hours a day. Technical Support is available Monday through Thursday from 9:15 to 24:00 (BST) and Friday from 9:00 to 23:00. +44 (0)2032 670067

Holidays for Europe include:

- New Year's Day, 1 January
- 2nd January (Scotland), 2 January
- Good Friday
- Easter Monday (England/Wales)
- Early May Bank Holiday
- Spring Bank Holiday
- Summer Bank Holiday (Scotland)
- Summer Bank Holiday (England/Wales)
- St. Andrew Day (Scotland)
- Christmas Day, 25 December
- Boxing Day, 26 December

Call Response Times

ASI prioritizes all calls as follows:

- System Down. All resources applied. Immediate initial response, with same to next-day targeted resolution for most issues.
- Inability to Perform a Critical Business Process. All scheduled resources applied. Immediate to ten-minute initial response, with same to next day targeted resolution for most issues.
- General how-to questions and techniques, installation questions and minor product bugs. All scheduled resources applied. Immediate to two-hour targeted initial response.

Requesting Support

To request technical support, browse to advsol.com/support and select Tech Support > Request Technical Support.

Once you submit a technical request support form, you will be given an SMR (Software Maintenance Request) case number and a time frame within which you will receive an e-mail response.

To check the status of or make updates to technical support requests, browse to advsol.-com/support and select Tech Support > Check Support Status.

To initially request technical support, you must submit your request online. However, you may call Technical Support for the following:

- To discuss an existing technical support request with an analyst
- To ask questions about services available through Technical Support
- To learn how to submit a technical support request online
- To get assistance with ASI website access issues

Please provide your name, organization name, and SMR (Software Maintenance Request) case number when contacting us.

- TechSupport@advsol.com
- advsol.com/support

Submitting Product Defects and Requests

- Product defects or enhancements are reported and documented by iMIS users. Defects are prioritized and a note on its priority is sent to the call initiator. High-priority items are scheduled for future maintenance releases; however, we cannot guarantee that a particular defect will be addressed in the next release.
- Requests for Enhancements and lower priority defects are reviewed on a periodic basis. Prior to work on each release, all open defects and enhancements are reviewed and pri-

oritized based on potential benefits. Not all reviewed program changes can be chosen for inclusion.

Additional Support Services

- Problem Escalation procedure for calls outstanding over one week are escalated to a senior analyst for concentrated research
- Known problem documentation, workaround procedures, and updates when product defects are prioritized and fixed
- Monthly Technical Newsletter available on the Tech Support community
- Product notification and availability of web releases
- Current product release maintenance on website
- Database search availability of reported incidents via website
- Tech Alert notification for serious and urgent product problems

What Support Cannot Cover

- Live or phone-based training, business analysis, and system setup (contact your AiSP or ASI)
- Implementation and conversion (contact your AiSP or ASI)
- Programming of enhancements (contact your AiSP or ASI)
- Weekend or after-hours support
- Questions about non-iMIS software, hardware or peripheral problems, or database administration (contact product vendor)
- Product pricing and pre-sales questions (contact your AiSP or ASI)
- Unsupported versions of iMIS
- ASI beta products (contact ASI Product Management)
- Specialized query or report writing (contact your AiSP or ASI)

- Data corruption analysis and repair that has occurred with prior releases (contact your AiSP or ASI)
- Support for 3rd party add-on and products not listed in a supported products and environments statement

ASI does not grant access to the Technical Support site for individuals that are serving as outside consultants or working temporarily for our customers. All support cases will only be communicated from Tech Support to either an iMIS customer or an ASI Authorized Solution Provider. Customers wishing to include any other outside consultants on conference calls and communications may do so at their discretion.

Non-Plan Services

The following services are available to all iMIS customers regardless of their iMIS Software Update Plan status.

Training

ASI offers a wide range of training courses designed for new and experienced users. Classes are held on a regular schedule at ASI offices worldwide, and at other locations based on demand. Training can also be customized to your specific needs. To register for any iMIS course, choose from these options, according to your location:

North America

- Register online.
- Fax your registration form to (703) 739-3218 or mail to ASI Training, 901 North Pitt St., Suite 200, Alexandria, VA 22301
- E-mail your registration information to training@advsol.com.
- If you do not see a class that you wish to attend listed in the timeframe or location that you desire, please e-mail training@advsol.com.

Asia-Pacific

- Download a full schedule and registration form.
- Fax your registration form to ASI at +61 3 9629 5919 or mail to ASI at Level 22, 459 Collins St, Melbourne, 3000, Australia.
- E-mail your registration information to training@advsol.com.
- If you do not see a class that you wish to attend listed in the timeframe or location that you desire, please contact your Customer Care Manager or e-mail training@advsol.com.

Europe

- ASI Europe can provide training on demand, customized to your specific needs. To learn more, e-mail training@advsol.com.

Consulting

ASI and its AiSPs all deliver a comprehensive array of consulting services to existing iMIS customers. These include iMIS system audits, custom report creation, website design, and more.

To learn more about consulting services in North America, contact your AiSP or ASI; in Europe and Asia-Pacific, contact ASI.

User Groups

NiUG, the International iMIS User Group, is the largest independent, not-for-profit, volunteer-run user group. Consisting of hundreds of company members, NiUG sponsors an independent, non-commercial list serve for all iMIS users, solution providers, vendors and ASI employees, which is a forum for discussing iMIS and iMIS-related issues. Regular (Organization) membership dues are based on how many licensed users the organization has for iMIS; Associate and Vendor member companies may join, but they are not able to vote; moreover, vendors do not have access to the NiUG listserve.

In addition to the ability to acquire abundant free technical advice via its list serve in a peer-to-peer format, members can get a discount on a number of iMIS-related products and services. NiUG also holds conferences three times a year at various locations throughout North America.

For more information, visit NiUG: niug.org

Webcasts

ASI offers a variety of product-related webcasts on a regular basis. To participate, all you need is access to a phone and a dedicated internet connection. You view the presentation through the internet and call a special toll-free number to hear the audio presentation and participate.

To view the latest schedule, visit Webcasts: advsol.com/webcasts

Discovery Conference

The Discovery Conference is an annual event bringing together the entire iMIS community of customers, AiSPs, ASI staff, and ASI business partners. Separate Conferences are held in North America, Europe, and Asia-Pacific.

This conference is a great opportunity to learn about the latest advances in iMIS, collaborate with fellow users of iMIS, and give feedback directly to the producers of the iMIS solutions. In addition, it is an excellent opportunity to learn about complementary solutions offered by ASI's business partners.

For more information, visit NiUG: niug.org

Software Updates

All production and maintenance releases of iMIS are made available to SUP members.

iMIS production releases take advantage of technological advances as well as incorporate new features based on feedback from the entire iMIS community of users. The iMIS community is comprised of more than 30,000 people, from over 10 countries, representing a wide variety of non-profit organizations as well as AiSPs and ASI staff.

iMIS production releases are available for download. iMIS maintenance releases address important product issues between production releases; they are available for download.

To access the latest iMIS releases, visit Product Releases: advsol.com/productreleases.

Contacting ASI

Contacting Customer Support

To submit general questions, provide feedback, or voice concerns, please contact the Customer Contact Center. All requests receive a response within one business day.

For customer service,

call 512-491-0550, option 5

e-mail CustomerContactCenter@advsol.com

Contacting ASI Offices

ASI United States

1-800-727-8682

info@advsol.com

Browse to advsol.com/usa

ASI Europe

0207 194 7972

info-eu@advsol.com

Browse to advsol.com/europe

ASI Canada

(800) 727-8682

info@advsol.com

Browse to advsol.com/canada

ASI Asia-Pacific

+61 3 9869 7500

info_aust@advsol.com

Browse to (advsol.com/ap

Subscribing to iNSIGHTS

iMIS iNSIGHTS is a monthly e-newsletter filled with news, tips and tricks, technical information, training and event notices, and more. This free service makes it easy to stay current with iMIS changes and build up your product knowledge.

To subscribe, e-mail insights@advsol.com.

Online Resources

Online resources are available to SUP members. To access online resources, you must obtain a user name and password.

- To obtain a user name and password, browse to advsol.com/register.

  Support Community

  ASI Technical Support maintains an online community with technical documentation, articles, and updates. Through this online community, you can also access product releases, sample reports, and database maintenance scripts and utilities.

- Browse to advsol.com/support and select Tech Support > Tech Support Community.

  iMIS Community

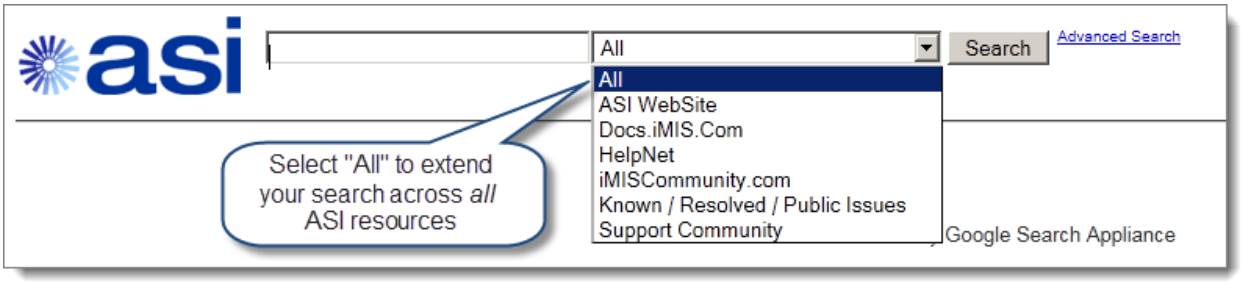
  iMIS Community facilitates the collaborative development of iMIS applications and solutions among the customers, partners, and developers of Advanced Solutions International. Make use of this extensive resource for help with iMIS implementation and development projects.

- Request access: imiscommunity.com/contact
- iMIS development: imiscommunity.com/sdk_center
- Documentation downloads (Word versions of Helpsite content)
- Schema documentation (Database reference)
- Business Object Designer (BOD)

- Database utilities
- iParts Registry
- Payment Gateways
- Technology previews: imiscommunity.com/previews
- Shared projects and solutions: imiscommunity.com/collaboration_center
- Forums: imiscommunity.com/forum

  Google search for iMIS

  ASI offers powerful information searching through a custom Google Search Appliance. Google Search gives you a single place from which to access information from one or all of ASI's sources: user documentation, developer postings, support issues, and community areas.



- Browse to advsol.com/support and select Tech Support > Google Search.

  Support Issues Search

  You can view real-time listings of software issues for each release. You can search resolved issues and known issues, by release version.

- Browse to advsol.com/support and select Tech Support > Search Issues.

  Knowledgebase Search

  You can access the powerful iMIS Knowledgebase online. This tool allows you to search the entire library of online resources, including HelpNet discussions, previously resolved technical issues, and other product and technical information.

- Browse to advsol.com/support and select Tech Support > Search Knowledgebase.

  Help and Documentation

  You have unrestricted access to the iMIS Helpsite, which provides the latest documentation for online browsing and searching; corrections and additions become available immediately.

  The Helpsite also includes downloadable, print-ready references that pull together comprehensive information and appendices on each feature set; they remain available on the Helpsite, so you do not have to log in to HelpNet for documentation.

- Browse to advsol.com/support and select Documentation, and follow the ordering link that appears under iMIS 20 Documentation.

  HelpNet Community

  iMIS HelpNet is an online self-service community devoted to empowering you to solve your own issues and develop application expertise. iMIS HelpNet hosts a discussion forum where you can post questions to the entire iMIS community of users, Authorized iMIS Solution Providers (AiSPs), and ASI Staff as well as search previous discussion threads.

  HelpNet also contains archives of iMIS 10 and 15 documentation, including user manuals, release notes, and installation instructions.

- Browse to advsol.com/support and select Tech Support > HelpNet Community.

Customer Support

Software Update Plan Services

Advanced Solutions International (ASI) values lifelong customer relationships. This is why we focus on providing customers with all the tools and resources necessary to keep iMIS forever. The decision to purchase iMIS is an investment in your organization's future, and the iMIS Software Update Plan lets you maximize and protect that investment.

Plan members receive access to industry-leading online resources, award-winning and certified technical support, and regular software updates.

For more information on the iMIS Software Update Plan (SUP):

- Browse to advsol.com/sup
- Contact: softwareupdateplan@advsol.com

iMIS Training – Learning iMIS

Advanced Solutions International provides a vast range of iMIS training courses. They are offered both as at-your-desk, web-based seminars, and face-to-face, in a classroom setting with an instructor.

The list of available courses is constantly expanding, and the existing training seminars are updated regularly to match the ever-improving iMIS product.

Available Topics	Description and link
iMIS Overview	Overview for Associations
	Overview for Fundraisers
iMIS Implementation	Implementation
Reporting	Introduction to SSRS (SQL Server Reporting Services)
	Introduction to IQA (Intelligent Query Architect)
	Applying IQA
	Crystal Reports
Customers	Customer Management for End Users
	Customer Management – Advanced Topics
	Customer Management for Administrators
Events	Events for End Users
	Events Setup

	Events Management
Billing	Billing/Dues for End Users
	Billing/Dues for Administrators
	Billing/Dues - Miscellaneous topics
Orders	Order Entry for End-Users
	Orders for Managers
	Orders - Inventory Management
AR/Cash	AR/Cash for End-Users
	AR/Cash for Managers
	AR/Cash Add-ons for Managers
iDashboards	iDashboards
Process Manager	Introduction to Process Manager
Fundraising	iMIS Fundraising
	iMIS Overview for Fundraisers
Applications Manager	Introduction to Applications Manager for iMIS
Business Object Designer	Business Object Designer
System Administration	Upgrades and Configurations
	Tailoring, Security, and Maintenance
Web	Web Content Management (WCM)
	WCM Configuration and Management
	WCM for Content Managers
TaskCentre	iMIS Task Centre
	Introduction to Task Centre
Programming	Certified iMIS Extension Developer
	iMIS SDK Programming (iParts, SOA, and iBO)
	Introduction to iMIS SDK

System Admin Console

Your Administrative Console includes a System Admin tab, which presents quick access to the tools that your staff needs most frequently in order to administer your websites, including iMIS Management, Workflow, and Utilities:

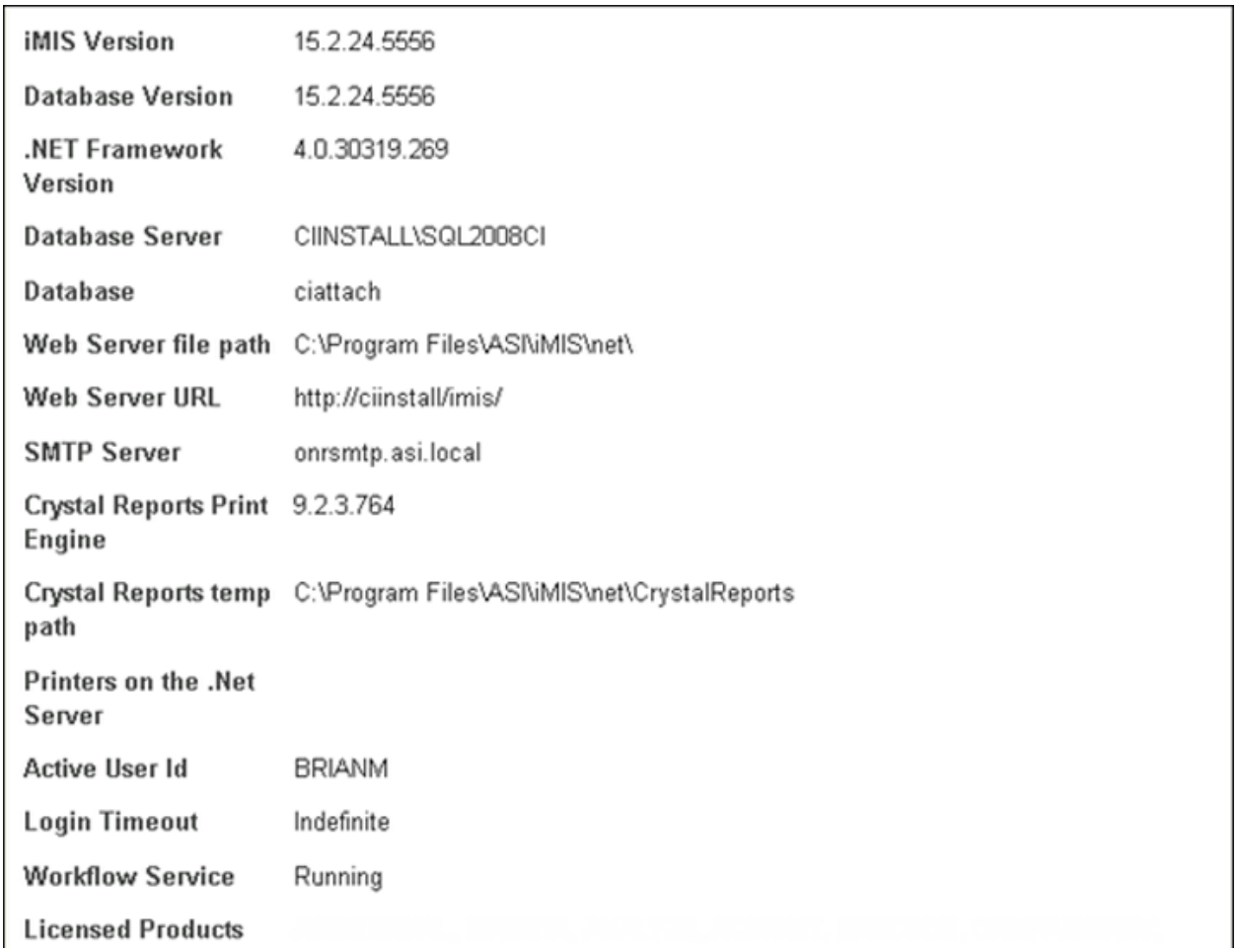
iMIS Management	Workflow	Utilities
System summary|topic=System Summary	Monitor workflow|topic=Workflow	Document system|topic=Document System
Set up printers|topic=Set up printers	Work item console|topic=Workflow engine	User defined tables|topic=Creating business objects for user-defined tables
Secutiy administration - Users|topic=Security administration - users	Monitor processes (Process engine)|topic=Process engine	Update iMIS|topic=Upgrading iMIS
Security Administration - Roles|topic=Security administration - roles	View tasks (Task view)|topic=Task Viewer	Package installer-|topic=Package Installer Utility
		Import activities|topic=Import activities

Note: Several of the topics listed above will redirect you to the web-based RiSE tools. If you would like to continue browsing this page, consider exploring the topics above by right-clicking and opening in a new window or tab.

iMIS Management

System Summary

The iMIS System Summary window displays system information.



iMIS Version	15.2.24.5556
Database Version	15.2.24.5556
.NET Framework Version	4.0.30319.269
Database Server	CIINSTALL\SQL2008CI
Database	ciattach
Web Server file path	C:\Program Files\ASI\iMIS\net\
Web Server URL	http://ciinstall/imis/
SMTP Server	onrsmtp.asi.local
Crystal Reports Print Engine	9.2.3.764
Crystal Reports temp path	C:\Program Files\ASI\iMIS\net\CrystalReports
Printers on the .Net Server	
Active User Id	BRIANM
Login Timeout	Indefinite
Workflow Service	Running
Licensed Products	

Example of iMIS system information

Security administration - Users

This window provides options for finding contacts or users, and creating and modifying iMIS user records.

Source (select a contact record)

Prompts you to select a contact, so that you can create or edit its user record.

iMIS

Users

Select a Query: All Full and Casual (NonSystem)

Logon Name Starts With:

iMIS ID Starts With:

Last First Starts With:

Full Logon Disabled: (Any)

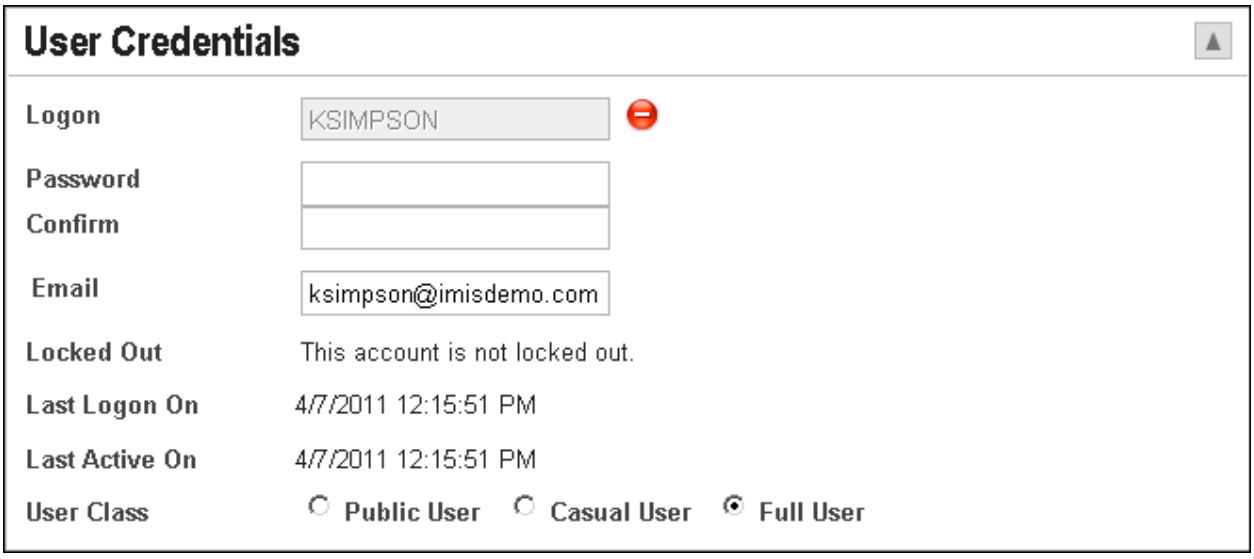
Edit Source Query

iMIS ID	Logon Name	Last First	Public User	Casual User	Full User	Web Security Group	Logon Disabled	Logon Effective	Logon Expires
18003	CSORIA	SORIA, CAROLINA	False	False	True		False	7/13/2008 12:00:00 AM	
17996	JSNEERINGER	SNEERINGER, JIM	False	False	True		False	7/13/2008 12:00:00 AM	
10221	KAREN	SIMPSON, KAREN	False	False	True	Staff	True	4/9/2004 12:00:00 AM	12/31/2010 12:00:00 AM
18013	MELISSA	SMITH, MELISSA	False	False	True		False	10/27/2008 12:00:00 AM	
18028	VSALT	SALT, VERUCA	False	True	False	Anonymous	False	5/29/2009 12:00:00 AM	5/29/2014 12:00:00 AM

Creating a contact record and editing a contact record will return different sections upon contact record search. Some sections are not available for certain User Classes, such as Public User.

User Credentials

Displays authentication record data from the ASP.NET authentication store. If the contact listed in the Contact Information area is not an iMIS user, the fields in the User Credentials area are empty.



- Logon - Displays this authentication record's logon name, or No User Selected when the authentication record is not linked to a user record.
- Password/Confirm - Input fields for changing an existing password.

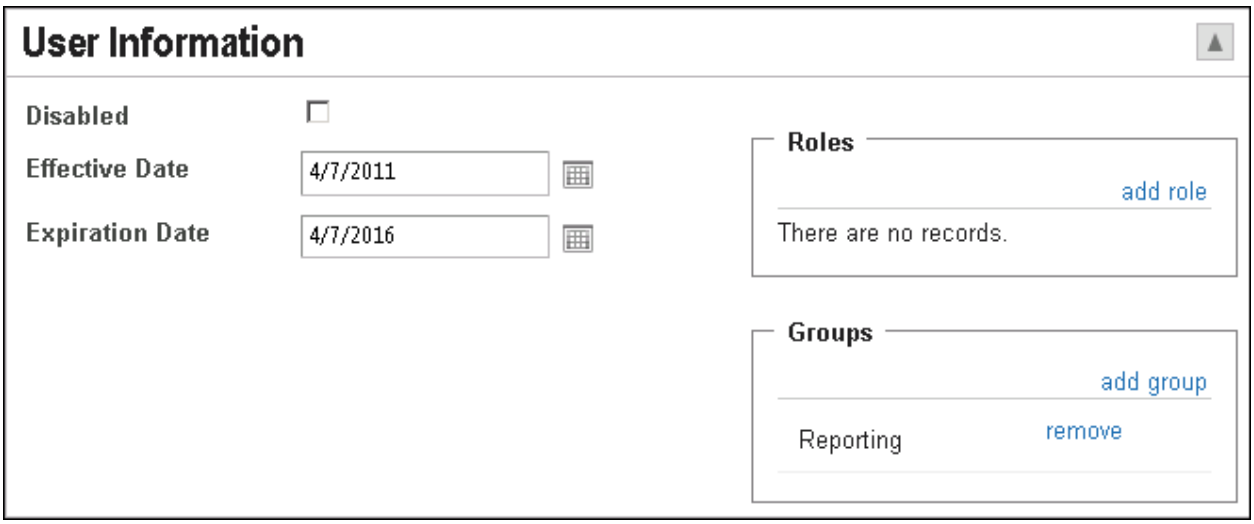
  Tip: By default, passwords must contain at least 6 characters. You can change the default password complexity requirements by editing the Web.config file for the iMIS application.
- Email - When you create a new authentication record, if the iMIS contact record includes an email address, iMIS populates the Create User Logon window with that address. However, the value that is displayed in this area of the Users window is always the value that is stored in the ASP.NET authentication store.
- Locked Out - Indicates whether this authentication record is temporarily blocked from gaining access to iMIS.

  Tip: By default, iMIS locks out an authentication record after 5 failed attempts to log on. You can change the default by editing the Web.config file for the iMIS application.
- User Class - Specifies the license (see "Types of iMIS licenses and views") to apply to this user, which controls all subsequent authorization.

  Note: Only those contacts with the user class of Full User are able to see the Staff Access areas.

  User Information

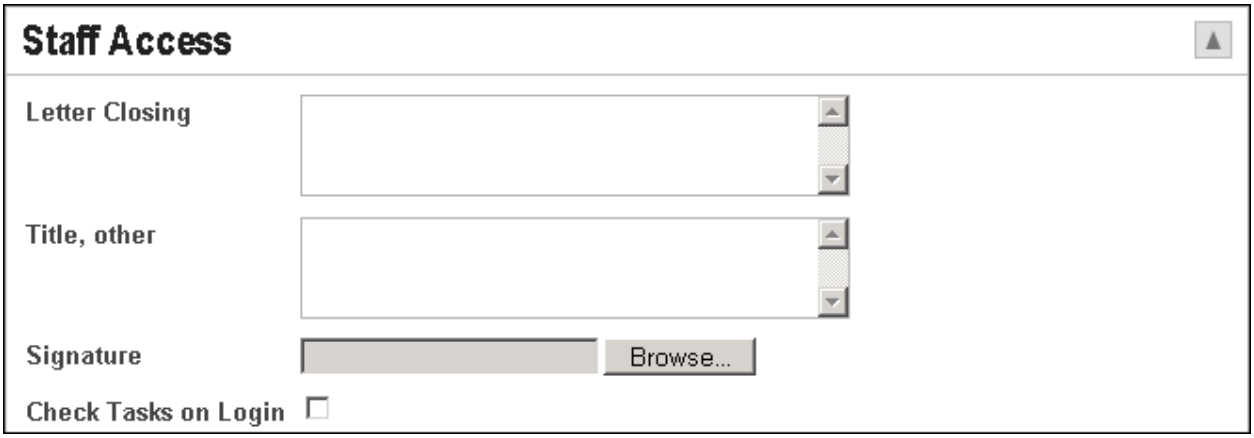
Sets membership dates and assigns ASP.NET roles and groups (see "User-level security: Roles and Groups") to the user record.



Caution! Do not remove a user's SysAdmin role without also lowering the Sys Mgmt level see About authorization levels|topic=About authorization levels (Desktop): parts of the system that consider them an administrator will conflict with the parts that do not. Make sure they have both or neither.

Staff Access

Sets options for iMIS Desktop client users:

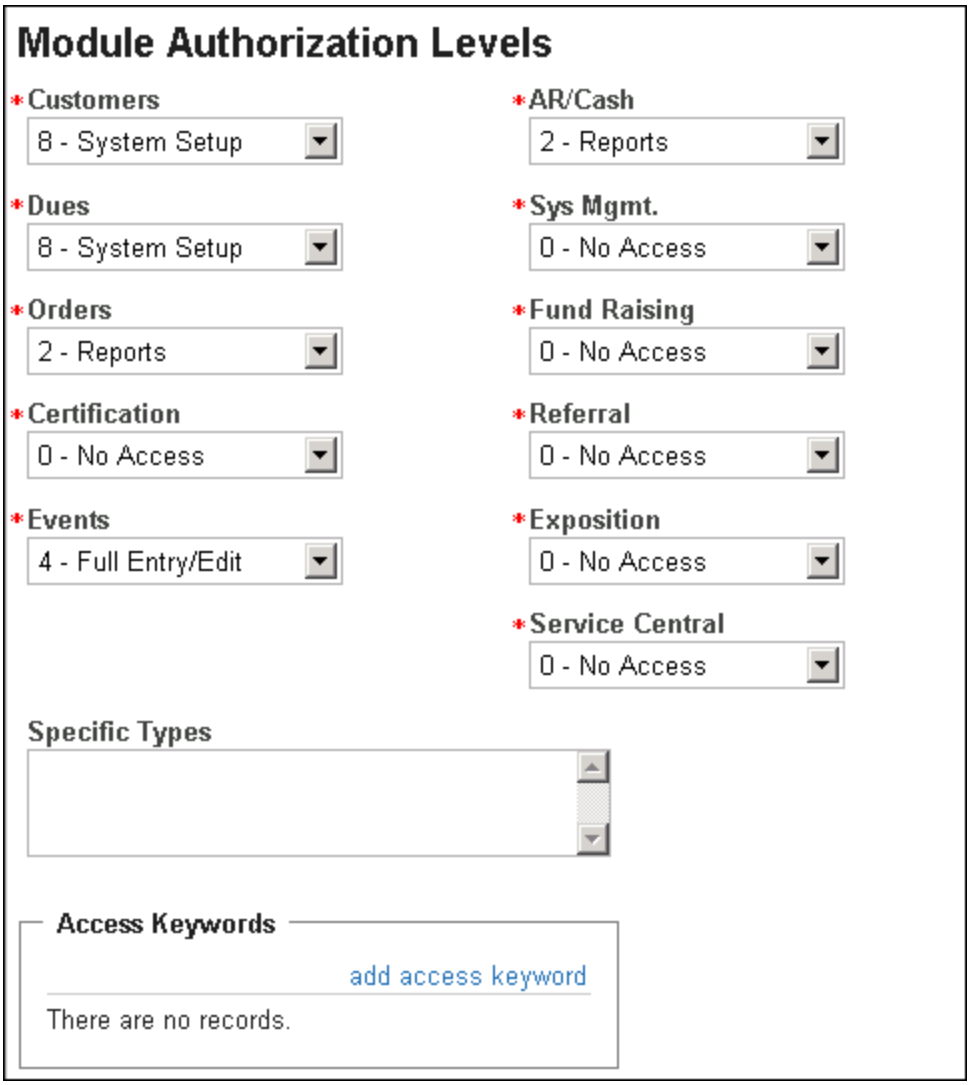


- Letter Closing - The text that closes letters sent by the user. For example, Sincerely.
- Title, other - The user's role, to use in letters. For example, Certification Specialist.

- Signature - An image of the user's signature, to use in letters. The image may be in one of the following formats:
- Microsoft Bitmap (BMP)
- Windows Meta File (WMF)
- Graphics Interchange Format (GIF)
- Portable Network Graphics (PNG)
- JPEG Interchange Format (JPG)

  iMIS converts the image into a BMP file before storing it in the database.
- Check Tasks On Login - Displays the user's View activity tasks window when they first log on. When cleared, displays the standard administrative view instead.

  Sets module authorization access|topic= About authorization levels (Desktop) for iMIS Desktop client users, which also affects some web client behaviors:



- Specific Types - Controls the customer types that the user can edit in Customers. The types listed in this field can be edited by this user. For example, if you only want the user to be able to edit records with customer type CM, add CM to the Specific Types field. The user will have read-only access to all other records. Separate customer types with spaces or commas.
- Sys mgmt. - Controls the availability of the Utilities menu on the iMIS Desktop menu bar, and the ability to define access keywords. The Utilities menu provides database maintenance and query commands. To enable iMIS Desktop system management privileges see About authorization levels|topic=About authorization levels (Desktop), specify level 8.

Access Keywords - The access keyword|topic=Access Keywords in Customers that restrict the user from viewing secured windows, tabs, reports, or windows. Separate access keywords with spaces or commas.

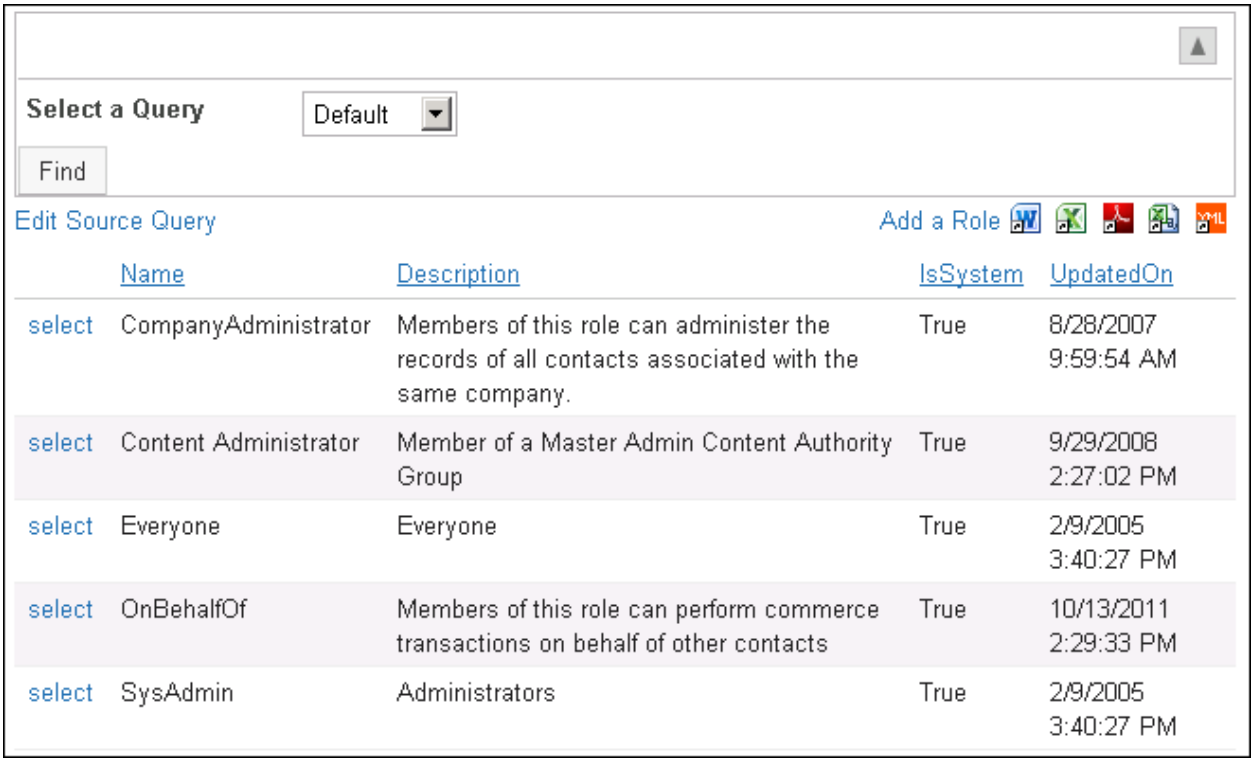
Security administration - roles

The Roles window provides options for creating new security roles.

- iMIS uses the Everyone and SysAdmin roles.

  Caution! SysAdmin is linked to Sys Mgmt. authorization see About authorization levels|topic=About authorization levels (Desktop): do not remove one and not the other.

- Applications that integrate with iMIS may use additional roles.



	Name	Description	IsSystem	UpdatedOn
select	CompanyAdministrator	Members of this role can administer the records of all contacts associated with the same company.	True	8/28/2007 9:59:54 AM
select	Content Administrator	Member of a Master Admin Content Authority Group	True	9/29/2008 2:27:02 PM
select	Everyone	Everyone	True	2/9/2005 3:40:27 PM
select	OnBehalfOf	Members of this role can perform commerce transactions on behalf of other contacts	True	10/13/2011 2:29:33 PM
select	SysAdmin	Administrators	True	2/9/2005 3:40:27 PM

From System Setup, select Security administration > Roles

Utilities

Update iMIS

Provides a link to the ASI support page to enable you to update iMIS.

Import activities

You can import request activities. This is particularly useful if you have a large number of identical requests that you must enter and track.

Note: Your administrator must set up request activities|topic=Setting up REQUEST, GIFT, and PLEDGE activity types.

To import activities

1. Choose your ID input method from one of the following:

   Input from file

   - Click Browse. A browse dialog opens.
   - Browse to and select the text file containing ID numbers, one ID per line.

   Input from Query

   - Enter a SQL query to run against the Name table. A message shows how many IDs have been selected.
   - Click OK to close the message.

2. Click Step 1 - Load IDs to load the IDs and enable the Activity Type field, Trans. Date field, and Step 2 - Set Values option. The remaining fields and buttons remain disabled and grayed-out until an Activity Type is selected from the drop-down list.
3. Select an Activity Type from the drop-down list.

   When an Activity Type is selected from the drop-down list, the user-defined fields and prompts that are set up for that activity type become available in the Import activities window.

   Note: The fields from the Activity Type field thru and including the User Field 7 field in the Import activities window are defined in the Activity types window by your administrator. The remaining fields in the Import activities window are available whenever an Activity Type is selected from the drop-down list. These are not user-defined fields, and knowledge of iMIS business processes is required to use them successfully.

4. Enter values in the fields defined for the activity type.
5. Click Step 2 - Set Values.

   When the step is complete, the Transformation Query field, and the options Optional Step 3 - Transform, Preview, and Step 4 - Generate Activity are activated.
6. Click Preview to display a grid-view of the records in the Activity Importer table.

   Note: At this point, nothing has been written to the Activity table.
7. Use the side and bottom scroll bars to check the data entered.
8. Click Hide Preview to return to the Import activities window.
9. (optional) Enter a SQL statement in the Transformation Query field to make any necessary modifications. For example, modify the Committee from Award Selection to Awards Presentation.
10. (optional) Click Optional Step 3 - Transform to update the ActivityImporter table and display a Transformation Complete message.
11. Click OK to continue.
12. (optional) Click Preview to display the grid-view and verify your modifications.

    At this point, you can click Hide Preview and continue with transformation queries. For example, you could update the Activity.CO_ID field by using the following query:

    ```
    Update ActivityImporter
    Set CO_ID = Name.CO_ID
    From Name where Name.CO_ID = ActivityImporter.CO_ID
    ```

    You can also use the transformation query to delete records from the ActivityImporter table before generating activities as in the following example:

    ```
    Delete from ActivityImporter
    Where ID = 140
    ```

13. After verifying that the values entered in the activity fields are correct, click Step 4 - Generate Activity.

    A system message informs you that activity records will be created.

14. Click Yes to create the activity records.

    After the activities have been created, the product displays a “Process is complete” message.

15. Click OK.

System Setup

This section describes the administration and security options in System Setup, as well as the options available through the administrative views (Desktop View, Administrative Console):

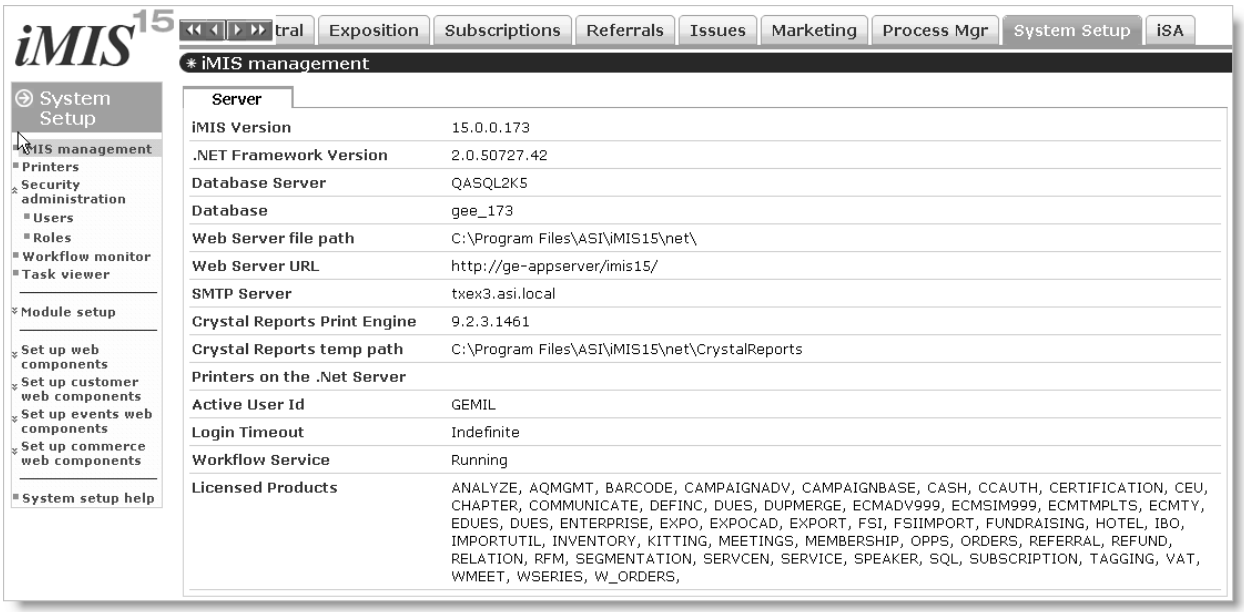
- The File > System Setup window
- The Utilities menu
- The Multi-instance Utility, available in the iMIS \bin folder

Note: To view and use this area, you must log on as a system administrator (the SysAdmin role).

System Setup

iMIS Management

The default window of iMIS System Setup displays system information.



Example of iMIS system information

Set up printers

You can configure printers for iMIS from System Setup.

Tips for configuring printers

- You must enter the printer server name and printer name (for example, \\PRNTSRV\HP4650). You can copy this from the printer information and paste it in the printer field.
- iMIS does not perform any printer validation checking when you add a printer. Be sure that you enter the printer server and printer information correctly.
- You must have permissions on the printer server to cancel an iMIS print job.

Task Viewer

You can use iMIS System Setup to view, edit, delete, and add tasks.

Tips for managing tasks

- You can access the Task Viewer from your Home page or iMIS System Setup. To access tasks from your Home page, select Home and select View tasks.
- Any user can modify the status of any task at any time, even if the task has already been completed.
- By default, a task can only be seen by its creator, an administrator, or a user who has been assigned the task.
- By default, only tasks that are currently in progress display. You can view completed tasks if needed.
- When adding more than one task, you must save and close the window after adding each task.

Module Setup

You can set up Marketing and Process Manager from iMIS System Setup or in the features themselves. Setup tasks include configuring and administering security groups, as well as additional setup tasks for some features, such as setting options for Campaigns and creating types and action plans for Process Manager.

Note: The setup tasks for Marketing and Process Manager display in iMIS System Setup even if your system is not licensed for these features.

Security Administration

Security Administration provides options for administering user records and the roles you can associate with user records.

For more on how licensing relates to views of iMIS, see Types of iMIS licenses and views in the Installation Guide.

Note: To administer user records and roles, your User Credentials must include the SysAdmin role.

Creating iMIS user records

iMIS user records control what users can see and do in every view of iMIS. Each user record is linked to two others: a contact record (defined in Customers) and an ASP.NET authentication record.

- First, you create a contact record for a new user, with descriptive, address, and demographic information.

  Caution! Never create contact records for Administrator or Manager: iMIS automates this for you.

- Next, you create a user record and link it to the new contact record, matching logon/-password to that of the contact record under Name_Security.

- Lastly, creating the user record triggers iMIS to create the needed authentication record in the ASP.NET authentication store, to authenticate users when they log on to iMIS. (Because other ASP.NET applications share the authentication store, iMIS cannot delete authentication records.)

  Troubleshooting tip: Remember that everything in iMIS that uses the keyword logon relates to the user records in the ASP.NET authentication store.

  To create user records

You generally need to create user records only for Full and Casual users (see "Types of iMIS licenses and views").

Tip: To create multiple user records faster, use the User Credentials button in the Manage Customers window; this lets you create a new contact record and jump directly User Credentials without leaving Customers.

1. If you are creating a set of user records, back up your iMIS database.
2. Launch iMIS Desktop and log on as MANAGER.
3. From Customers > Manage Customers, define (or find) a contact record for the user.

   When you click Save, the new contact record appears in the history area.
4. Click User Credentials to jump directly to User Credentials setup (System Setup > Security Administration > Users).
5. On the Users window, find the contact.

- In the View drop-down list, select Contacts:

  Select Users only to change an existing user record.
- Enter search criteria and click go.

  In the results list, the check in the Public User, Casual User, or Full User column marks which user class is currently assigned.

  Upgrades from 10.6: Records are set to Disabled because you need to allocate your named licenses before enabling them.
- Select the record from the results list, and click the Select icon.

6. If you are creating a new user record, add logon information.

- In the Logon field, click the Add icon.
- In the Create User Logon window, define a Logon Name, Password (minimum: 6 chars and one non-alpha), and E-mail address.
- Click Create User.

An authentication record for this logon is created in the ASP.NET authentication store.

7. In the User Class field, choose the user class (Public, Casual, or Full).

   (Full or Casual) iMIS opens the User Access area (for web permissions) and prompts you to save before continuing.

   Note: Any Full user can see the User Credentials area if they have been granted Authorization level 4 or higher for Sys Mgmt., and if they have been granted any relevant access keyword for Name Internet Security Data (iMIS Customers > Set up module > General > Access Keys). However, only Full users who are members of the SysAdmin role can see the User Access section.

8. Scroll to the bottom of the window and click Save.

- Success: If the user class is not maxed out for named licenses, the user record is created and the User Credentials area expands.
- Failure (error message): If the user class is maxed out, no user record is created. When you recreate a user record for this contact record (by picking a different class or increasing your license counts), be sure to click the Link this contact… icon in the Logon field and specify the logon that you created during the first attempt.

9. (Full or Casual only) Add role, group, module authorization, and access keywords as needed.

- In the User Information area, add the user to a role or group.
- In the Staff Access area, set authorizations, customer type restrictions, and any access keywords.
- Set authorization levels for each listed feature. (See "Authorization level privileges (Desktop)")
- (optional) In the Specific Types field, restrict the user's access by specifying a comma-delimited list of the only customer types that this user can edit in Customers. (See "Defining Customer Types" in Customer Features.)

- (optional) Click … next to the Access Keywords field and enter access keywords, if any. (See "iMIS Desktop Access Keywords (see "Access Keywords in Customers")" in System Setup.)
- Click Save.

  Note: How or whether user-specific authorization levels apply might differ between staff and administrative views. For more, see Security Administration.

10. Test the ability of this user to log on with the associated authentication record.

- Staff view: browse to iMIS and log on.
- Administrative view: choose File > User Id and log on.

  User-level security: Roles and Groups

  Together, security roles and security groups let you control access to the ASP.NET-based features of iMIS; in contrast, older features of iMIS are secured using authorization levels (see "Authorization level privileges (Desktop)"). Security role and group assignments are defined in user records.

- Security roles grant specific administrative privileges to user records. For example, one security role might let you use and edit an iMIS definition object in the Document System, while another role might let you use that object but not edit (or even see) its properties.
- Security groups control which iMIS features group members see and which capabilities within each feature they can use.

  Tip: User-level security is separate from object-level security (see "Shared security sets, for object-level access"), which restricts objects (folders, queries, reports) in the Document System.

  Roles: SysAdmin

  The default SysAdmin role grants privileges much like those of the MANAGER user record. Only a Full user can be a SysAdmin. Each SysAdmin can:

- Edit user records, including logon names (unless that privilege is disabled in the web.config file for iMIS)

- Use System Setup
- Use Tools (if licensed)
- Administer Issues (if licensed)
- Start e-mail server
- Set up module

Groups

The following table describes the security groups that affects user privileges.

CampaignAdmin	Enables full-control access to the Campaign functionality and its objects	Marketing
CampaignMgr	Enables read/add/edit/delete access to the Campaign functionality, and read/edit access to its objects	Marketing
CampaignUser	Enables read-only access to the Campaign functionality and its objects	Marketing
Certification Admin	Enables full-control access to the Certification functionality and its objects	Certification
Certification Manager	Enables read/add/edit/delete access to the Certification functionality, and read/edit access to its objects	Certification
Certification User	Enables read-only access to the Certification functionality and its objects	Certification
EventUser	Controls security for IQA integration	Events
FRUser	Controls security for IQA integration	Fundraising
OpportunityAdmin	Enables full-control access to Process Manager and its objects	Process Manager
OpportunityCreator	In Process Manager, enables add privileges for projects, and read/edit/delete access to created projects,	Process Manager

	but read-only access to projects created by others	
OpportunityMgr	Enables read/add/edit/delete access to Process Manager, and read/edit access to its objects	Process Manager
OpportunityOwners	Enables addition to a project's Owner or Contact group	Process Manager
OpportunityUser	Enables read-only access to Process Manager and its objects	Process Manager
OrderUser	Controls security for IQA integration	Orders
Reporting	Enables access to IQA query links	IQA
RFMAdmin	Enables full-control access to the RFM application and its objects	Marketing
RFMMgr	Enables read/add/edit/delete access to the RFM application, and read/edit access to its objects	Marketing
RFMUser	Enables read-only access to the RFM functionality and its objects	Marketing
SegAdmin	Enables full-control access to the Segmentation functionality and its objects	Marketing
SegMgr	Enables read/add/edit/delete access to the Segmentation functionality, and read/edit access to its objects	Marketing
SegUser	Enables read-only access to the Segmentation functionality and its objects	Marketing

Group membership controls web access

Group membership determines whether a user sees Marketing and/or Process Manager from a web client.

- To grant access to Marketing, place users in one of these groups:
- CampaignAdmin

- CampaignMgr
- CampaignUser
- RFMAdmin
- RFMMgr
- RFMUser
- SegAdmin
- SegMgr
- SegUser
- To grant access to Process Manager, place users in one of these groups:
- OpportunityAdmin
- OpportunityCreator
- OpportunityMgr
- OpportunityOwners
- OpportunityUser

Note: Casual licensing prevents access Marketing or Process Manager, regardless of group assignments.

Securing logons and authorization persistence

Following is information to help you control user logon behavior and troubleshoot logon issues.

Conflicts from shared Windows logins

iMIS employs the ASP.NET login controls and uses HTTP cookies for state information. If two different iMIS users share the same Microsoft Windows login on the same client system, iMIS features that use cookie data may appear to confuse one user with the other. To avoid this problem, always ensure that every iMIS user has a unique Windows login.

Authorization persistence: web clients

By default, web client users can make their authentication record authorization persistent. To disable this option, edit the Web.config file used for the iMIS application. iMIS Desktop users, by contrast, must always log on and be reauthorized each time.

Authorization changes: locating and disabling

By default, users are allowed to change their own logon name and password. To disable the option to change their logon, edit the Web.config file used for the iMIS application and change the AllowUsernameChange system parameter to false. The option to change their password cannot be disabled.

- iMIS Desktop users can change their own logon name and password through the File > Change Password option, which displays the Enter new Logon or Password window.
- Full and Casual users can change their own logon name and password through the Contacts tab.
- Public users can change their own logon name and password through the My Account tab in the Public view.
- Full users who belong to the SysAdmin role can change the logon name and password for other users through the System Setup feature of iMIS (From System Setup, select Security administration > Users).

About ODBC connections

The iMIS Desktop client uses information returned by an iMIS application server's ASP.NET authentication store to create an ODBC DSN for the database associated with that application server. So, iMIS Desktop users only need the URL of an application server with an instance of the iMIS application to ensure that they are using the correct iMIS database.

Removing user logon names

When you remove a logon under User Credentials by selecting the "-" button, then attempt to add the same login back using the "+" button, the contact gets two security records in iMIS. You can verify this problem by searching by username. When a contact

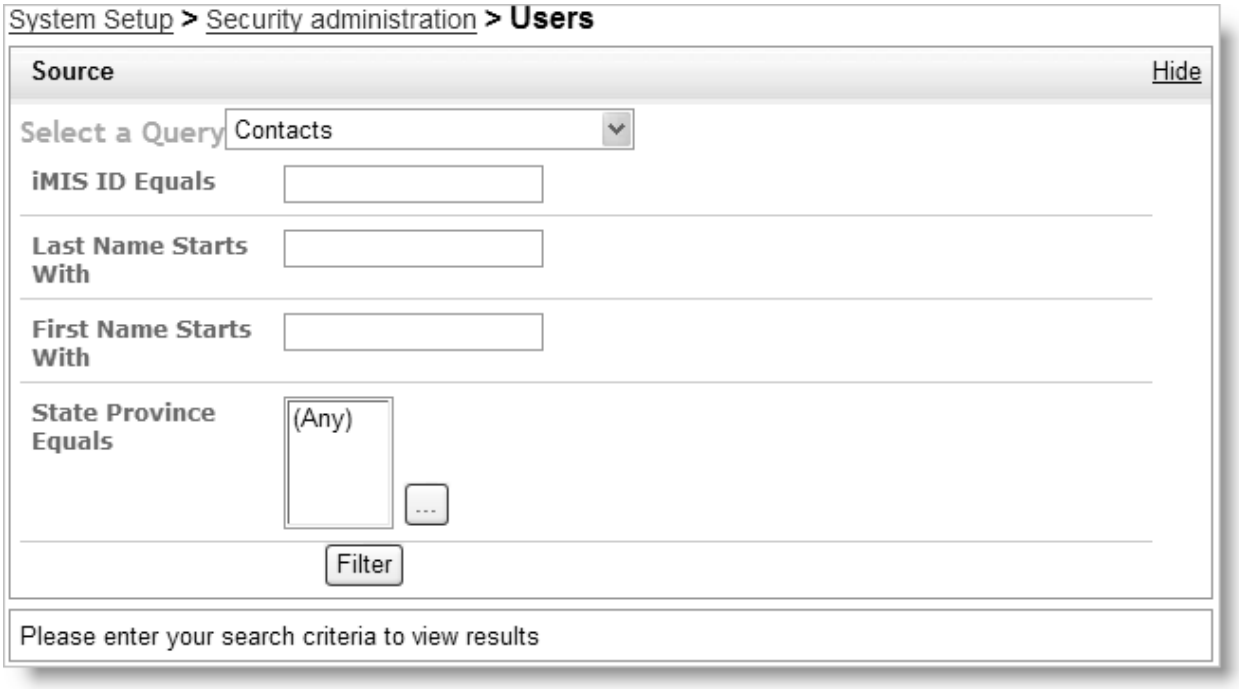
has more than one record then they can not log on. If this happens, you must find the original username for the user and then select the play button for that user, then save the user record. This action deletes the records that need to be cleaned up and allows the user to logon again.

Users window

This window provides options for finding contacts or users, and creating and modifying iMIS user records.

Source (select a contact record)

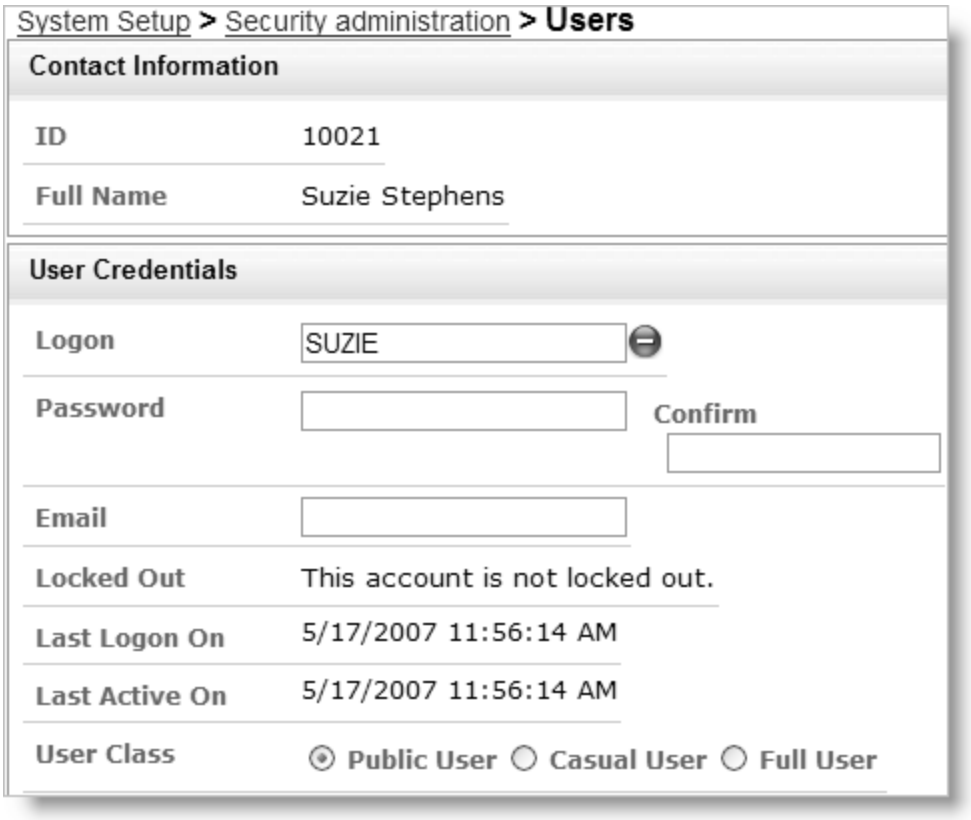
Prompts you to select a contact, so that you can create or edit its user record.



Once you select a contact record, which sections appear depends on whether you are editing its user record or creating it for the first time. Some sections are not available for certain User Classes, such as Public User.

User Credentials

Displays authentication record data from the ASP.NET authentication store. If the contact listed in the Contact Information area is not an iMIS user, the fields in the User Credentials area are empty.



- Logon - Displays this authentication record's logon name, or No User Selected when the authentication record is not linked to a user record.
- Password/Confirm - Input fields for changing an existing password.

  Tip: By default, passwords must contain at least 6 characters. You can change the default password complexity requirements by editing the Web.config file for the iMIS application.
- Email - When you create a new authentication record, if the iMIS contact record includes an email address, iMIS populates the Create User Logon window with that address. However, the value that is displayed in this area of the Users window is always the value that is stored in the ASP.NET authentication store.

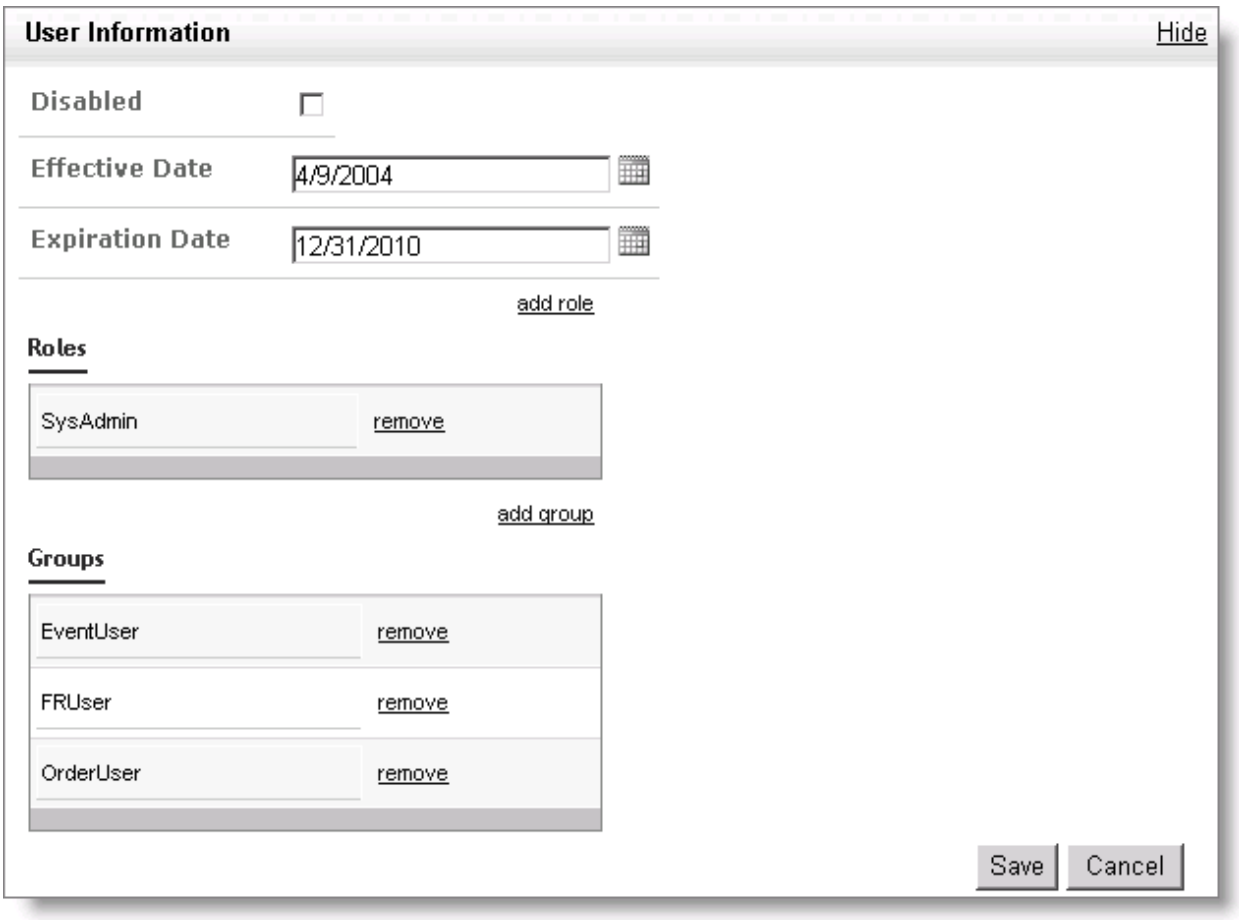
- Locked Out - Indicates whether this authentication record is temporarily blocked from gaining access to iMIS.

  Tip: By default, iMIS locks out an authentication record after 5 failed attempts to log on. You can change the default by editing the Web.config file for the iMIS application.

- User Class - Specifies the license (see "Types of iMIS licenses and views") to apply to this user, which controls all subsequent authorization.

  User Information

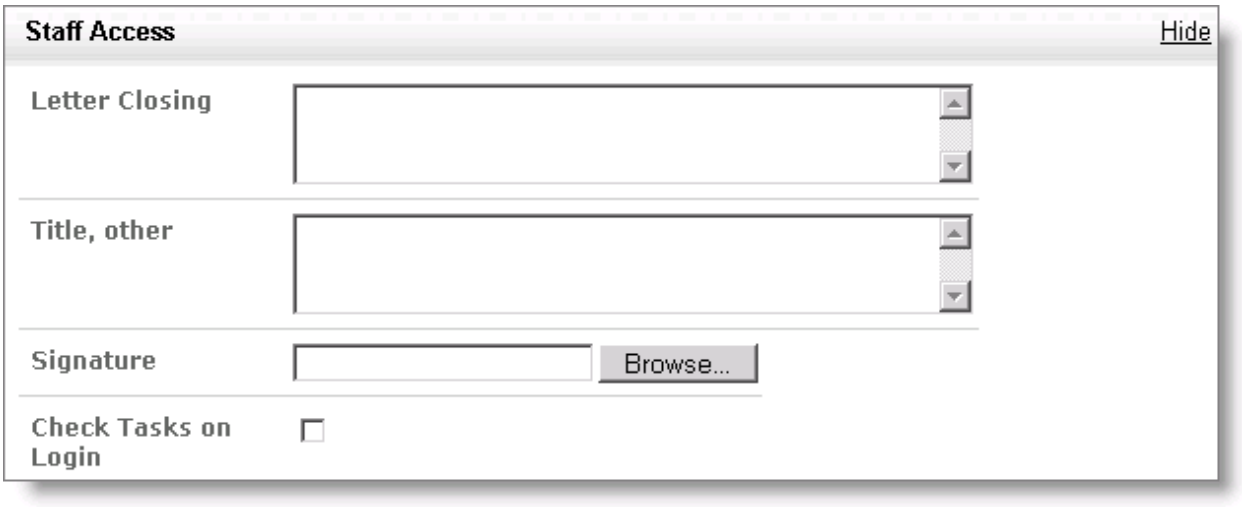
  Sets membership dates and assigns ASP.NET roles and groups (see "User-level security: Roles and Groups") to the user record.



Caution! Do not remove a user's SysAdmin role without also lowering the Sys Mgmt level (see "About authorization levels (Desktop)"): parts of the system that consider them an administrator will conflict with the parts that do not. Make sure they have both or neither.

Staff Access

Sets options for iMIS Desktop client users:

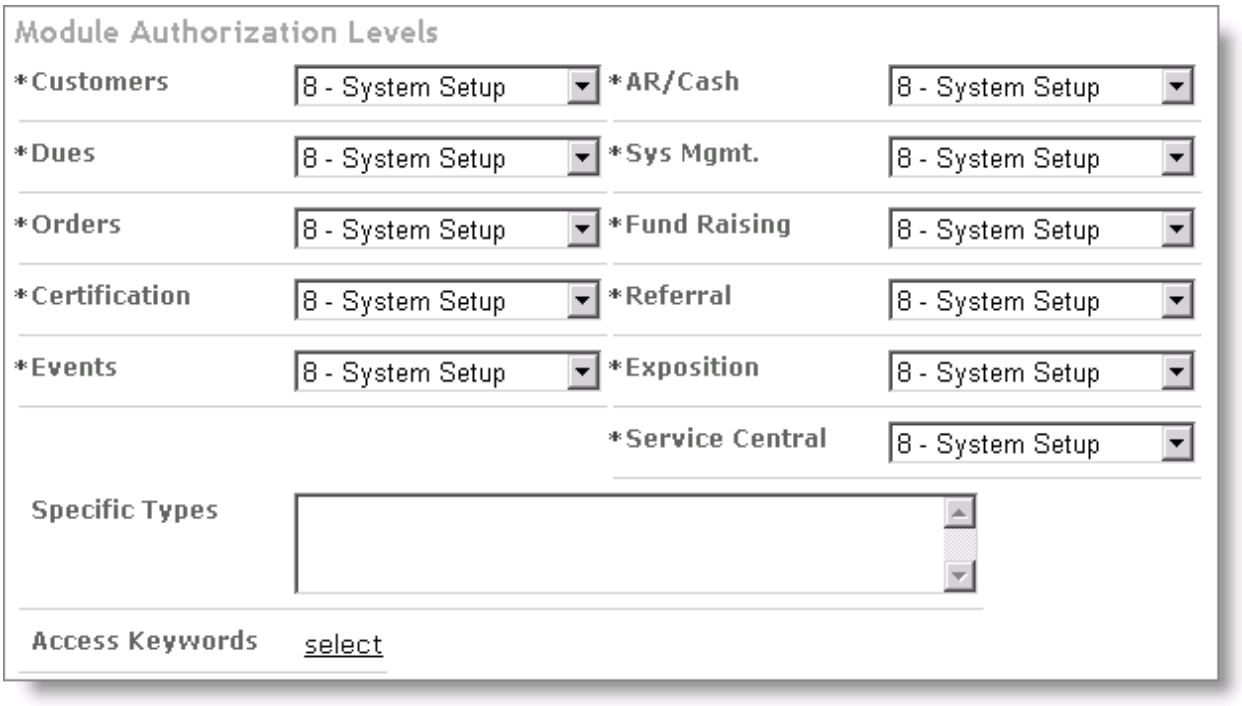


- Letter Closing - The text that closes letters sent by the user. For example, Sincerely.
- Title, other - The user's role, to use in letters. For example, Certification Specialist.
- Signature - An image of the user's signature, to use in letters. The image may be in one of the following formats:
- Microsoft Bitmap (BMP)
- Windows Meta File (WMF)
- Graphics Interchange Format (GIF)
- Portable Network Graphics (PNG)
- JPEG Interchange Format (JPG)

  iMIS converts the image into a BMP file before storing it in the database.

- Check Tasks On Login - Displays the user's View activity tasks window when they first log on. When cleared, displays the standard administrative view instead.

  Sets module authorization access (see "Access control: Desktop-only features") for iMIS Desktop client users, which also affects some web client behaviors:



- Specific Types - Controls the customer types that the user can edit in Customers. The types listed in this field can be edited by this user. For example, if you only want the user to be able to edit records with customer type CM, add CM to the Specific Types field. The user will have read-only access to all other records. Separate customer types with spaces or commas.
- Sys mgmt. - Controls the availability of the Utilities menu on the iMIS Desktop menu bar, and the ability to define access keywords. The Utilities menu provides database maintenance and query commands. To enable iMIS Desktop system management privileges (see "About authorization levels (Desktop)"), specify level 8.
- Access Keywords - The access keywords (see "Access Keywords in Customers") that restrict the user from viewing secured windows, tabs, reports, or windows. Separate access keywords with spaces or commas.

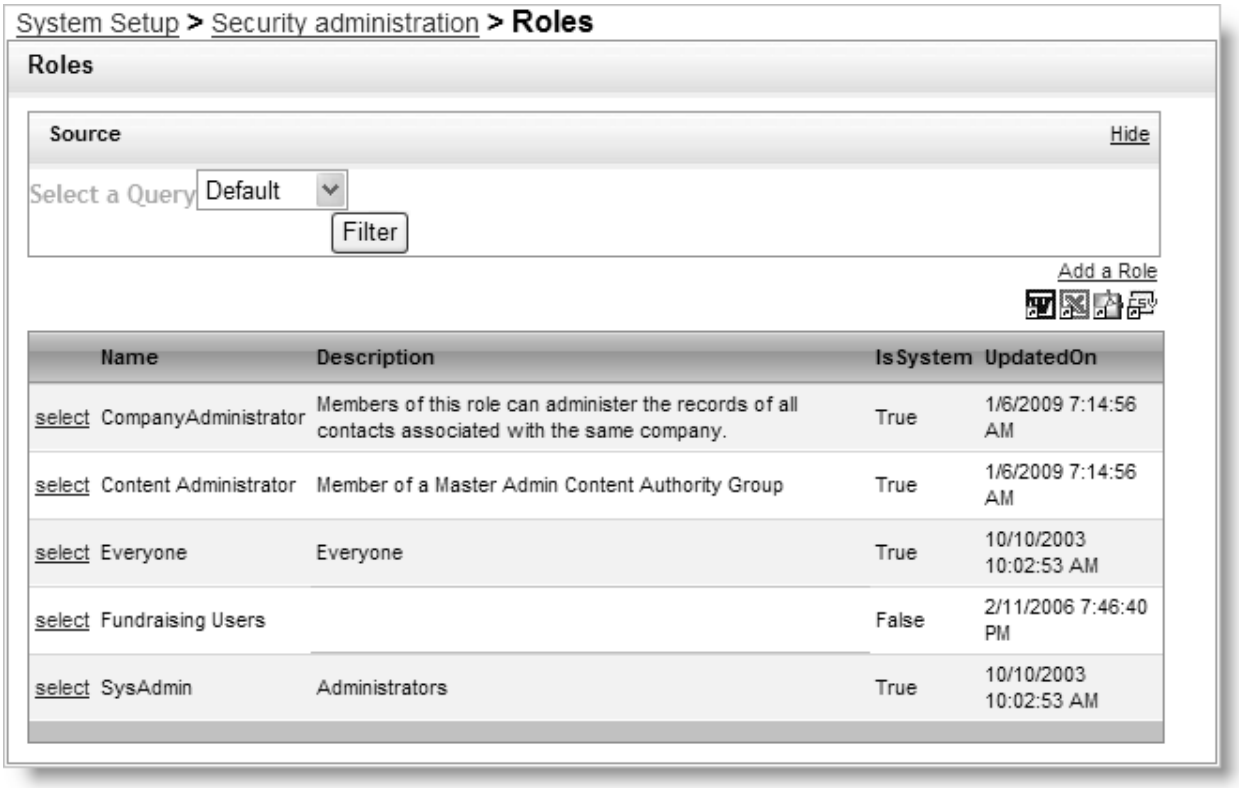
Roles window

The Roles window provides options for creating new security roles.

- iMIS uses the Everyone and SysAdmin roles.

  Caution! SysAdmin is linked to Sys Mgmt. authorization (see "About authorization levels (Desktop)"): do not remove one and not the other.

- Applications that integrate with iMIS may use additional roles.



	Name	Description	IsSystem	UpdatedOn
select	CompanyAdministrator	Members of this role can administer the records of all contacts associated with the same company.	True	1/6/2009 7:14:56 AM
select	Content Administrator	Member of a Master Admin Content Authority Group	True	1/6/2009 7:14:56 AM
select	Everyone	Everyone	True	10/10/2003 10:02:53 AM
select	Fundraising Users		False	2/11/2006 7:46:40 PM
select	SysAdmin	Administrators	True	10/10/2003 10:02:53 AM

From System Setup, select Security administration > Roles

Enabling CAPTCHA security

iMIS uses CAPTCHAs for security when users create a new account and when users have forgotten their username or password. CAPTCHA is a program that can generate and grade tests that humans can pass but current computer programs cannot. For example, humans can read the distorted text below, but computers can't.

To enable CAPTCHA security

1. Create an account with reCAPTCHA.
2. Follow reCAPTCHA's instructions to create your Public and Private keys.
3. On your production iMIS appserver host, open the web.config files for each iMIS application.

- iMIS default location: C:\Program Files\ASI\iMIS\net
- iMISpublic default location: C:\Program Files\ASI\iMIS\iMIS_public

4. If you have a license for Web Content Management and have the WCM application installed on one or more external web servers, open the web.config file for the WCM application on each external web server.

- WCM default location: C:\Program Files\ASI\WCM\Net

5. In each web.config file, add the Public and Private keys generated by reCAPTCHA to the values of the following entries:

   <add key="RecaptchaPublicKey" value=""/>

   <add key="RecaptchaPrivateKey" value=""/>

6. Save the files.

   CAPTCHA security is now enabled.

Access control: Staff views

Both Full and Casual users can use the staff views (Web view, Staff site).

Access control: Home page (staff views)

All content	Full or Casual user

Access control: Directory

All content	Full or Casual user + MEMBERSHIP license

Access control: Contacts

Your user class and your specific Customers authorization level affects the degree to which you can view or edit contact records:

- Full and Casual users can only view contact records - auth level 1
- Full and Casual users can create and edit contact records - auth level 3
- (if enabled) Full and Casual users can delete contact records - auth level 4
- A maximum of auth level 4 can be granted to Casual users.

Note: To enable the ability to delete contact records, use the Customer Setup - Basic Options window. (From Customers, select Set up module > General and click Basic Options.)

Your user class and your specific Dues authorization level affects the degree to which you can view or edit billing records:

- Full and Casual users can only view billing records - auth level 1
- Full users can create and edit billing records - auth level 3
- Full users can delete billing records - auth level 4
- A maximum of auth level 2 can be granted to Casual users.

Your user class and your specific Orders authorization level affects the degree to which you can view or edit orders:

- Full and Casual users can only view orders - auth level 1
- Full users can create and edit orders - auth level 3
- Full users can delete orders - auth level 4
- A maximum of auth level 2 can be granted to Casual users.

Your user class and your specific Events authorization level affects the degree to which you can view or edit event records:

- Full and Casual users can only view event records - auth level 1
- Full users can create and edit event records - auth level 3
- Full users can delete event records - auth level 4
- A maximum of auth level 2 can be granted to Casual users.

Find contact	Full or Casual user + Customers auth level 1 + MEMBERSHIP license
Create account	Full or Casual user + Customers auth level 3 + MEMBERSHIP license
Contact management > Personal	Full or Casual user + Customers auth level 1 + MEMBERSHIP license Read-only for all user classes unless: • The customer type of the contact record is not one of customer types listed in the Specific Types field of your user record (if any) • You are viewing your own contact record Name Status Edit access keyword (see "Access Keywords in Customers") might be required in your user record to specify a Member Type If your user record contains a list of Specific Types, you can choose only among those types when specifying a Member Type Name Address Edit access keyword (see "Access Keywords in Customers") might be required in your user record to specify E-mail, Work phone, Home Phone, Toll free phone, Fax, and Web site information
Contact management > Address	Full or Casual user + Customers auth level 3 + MEMBERSHIP license Read-only for all user classes unless at least one condition met from both of the following lists: • The customer type of the contact record is not one of customer types lis-

	ted in the Specific Types field of your user record (if any) • You are viewing your own contact record AND • Name Address Edit access keyword (see "Access Keywords in Customers") might be required in your user record • You are viewing your own contact record
Contact management > Logon & password	Full or Casual user + Customers auth level 4 + MEMBERSHIP license Name Internet Security Data access keyword (see "Access Keywords in Customers") might be required in your user record Full users who belong to the SysAdmin role can always see this task list item
Contact management > Orders	Full or Casual user + Customers auth level 1 + Orders auth level 1 + MEMBERSHIP and ORDER licenses
Contact management > Billing	Full or Casual user + Customers auth level 1 + Dues auth level 1 + MEMBERSHIP and DUES licenses
Contact management > Activities	Full or Casual user + Customers auth level 1 + MEMBERSHIP license Read-only for all user classes regardless of auth level An activity type access keyword (see "Access Keywords in Customers") for each product type might be required in your user record
Contact management > Call logs	Full or Casual user + Customers auth level 1 + MEMBERSHIP license An activity type access keyword (see "Access Keywords in Customers") for the CALL product type might be required in your user record
Contact management > Change logs	Full or Casual user + Customers auth level 1 + MEMBERSHIP license Read-only for all user classes regardless of auth level

Contact management > Fundraising	Full or Casual user + Customers auth level 1 + Fund Raising auth level 1 + MEMBERSHIP and FUNDR licenses Read-only for all user classes regardless of auth level Fundraising History View access keyword (see "Access Keywords in Customers") might be required in your user record
Contact management > User defined fields	Full or Casual user + Customers auth level 1 + MEMBERSHIP license
Register for event	Full or Casual user + Customers auth level 1 + Events auth level 1 + MEMBERSHIP and MEET licenses The Register button is available on an event's detail page only if the event's status is Active and one of the following conditions are met: • You are the currently selected Contact • You have the same Company (Organization) name as the selected Contact • You are a Full user
Make a purchase	Full or Casual user + Customers auth level 1 + Orders auth level 1 + MEMBERSHIP and ORDER licenses Read-only for Casual users regardless of Customers auth level
Make a purchase > Cart	Full user + Customers auth level 1 + Orders auth level 1 + MEMBERSHIP and ORDER licenses

Access control: Events (staff views)

Your user class and your specific Events authorization level affects the degree to which you can view or edit event records:

- Full and Casual users can only view event records - auth level 1
- Full users can create and edit event records - auth level 3
- Full users can delete event records - auth level 4
- A maximum of auth level 2 can be granted to Casual users.

All content	Full or Casual user + Events auth level 1 + MEET license The Register button is available on an event's detail page only if the event's status is Active and one of the following conditions are met: • You are the currently selected Contact • You have the same Company (Organization) name as the selected Contact • You are a Full user

Access control: Donations

Your user class and your specific Fund Raising authorization level affects the degree to which you can view or edit fundraising records:

- Full users can create and edit fundraising records - auth level 3
- Full users can delete fundraising records - auth level 4
- A maximum of auth level 2 can be granted to Casual users, which effectively forbids Casual users from accessing Donations

All content	Full user + Fund Raising auth level 3 + FUNDR license

Access control: Store

Your user class and your specific Orders authorization level affects the degree to which you can view or edit orders:

- Full and Casual users can only view orders - auth level 1
- Full users can create and edit orders - auth level 3
- Full users can delete orders - auth level 4
- A maximum of auth level 2 can be granted to Casual users.

Browse categories	Full or Casual user + Orders auth level 1 + ORDER license
Search	Full or Casual user + Orders auth level 1 + ORDER license
Cart	Full user + Orders auth level 1 + ORDER or MEET or DUES license

Access control: Marketing

Campaign management	Full user + Campaign... group + CAMPAIGN license
Campaign definition	Full user + Campaign... group + CAMPAIGN license
Inserts	Full user + Campaign... group + CAMPAIGN license
Record responses	Full user + Campaign... group + CAMPAIGN license
Generate reports (campaigns)	Full user + Campaign... group + CAMPAIGN license
View output	Full user + Campaign... group + CAMPAIGN license
Set up campaign module	Full user + CampaignAdmin group + CAMPAIGN license
Segmentation	Full user + Seg... group + SEGMENTATION license
Generate reports (segmentation)	Full user + Seg... group + SEGMENTATION license
Set up segmentation module	Full user + SegAdmin group + SEGMENTATION license
RFM Analytics	Full user + RFM... group + RFM license
Generate reports (RFM)	Full user + RFM... group + RFM license
Set up RFM module	Full user + RFMAdmin group + RFM license

Access control: Process Mgr

Process manager	Full user + Opportunity... group + OPPS license
Tasks	Full user + Opportunity... group + OPPS license
Generate reports	Full user + Opportunity... group + OPPS license
Set up module	Full user + OpportunityAdmin group + OPPS license

Access control: System Setup

iMIS management	Full user + SysAdmin role
Printers	Full user + SysAdmin role
Security Administration	Full user + SysAdmin role
Workflow monitor	Full user + SysAdmin role
Task viewer	Full user + SysAdmin role
Module setup > Campaign management	Full user + SysAdmin role + CAMPAIGN license
Module setup > Segmentation management	Full user + SysAdmin role + SEGMENTATION license
Module setup > RFM Analytics	Full user + SysAdmin role + RFM license
Module setup > Process manager	Full user + SysAdmin role + OPPS license
Set up web components	Full user + SysAdmin role
Set up customer web components	Full user + SysAdmin role + MEMBERSHIP license
Set up events web components	Full user + SysAdmin role + MEET license
Set up commerce web components	Full user + SysAdmin role + MEET or ORDERS or DUES license
Set up commerce web components > Billing configuration	Full user + SysAdmin role + DUES license

Access control: Tools

Tools console	Full user + SysAdmin role

Document system	Full user + SysAdmin role
Intelligent query architect	Full user + SysAdmin role
User defined tables	Full user + SysAdmin role
Business object designer	Full user + SysAdmin role
Site Designer	Full user + SysAdmin role
All other content	Beta customers only

Access control: Content Management

Content Management console	Full user + (SysAdmin role -OR- member of a content authority group) + WCM license
Site designer	Full user + (SysAdmin role -OR- member of a content authority group) + WCM license
Content designer	Full user + (SysAdmin role -OR- member of a content authority group) + WCM license
Tagging	Full user + (SysAdmin role -OR- member of a content authority group) + WCM and TAGGING license
Reports	Full user + (SysAdmin role) + WCM license
Maintenance	Full user + (SysAdmin role) + WCM license
All other content	Beta customers only

Access control: Administrative views

Both Full and Casual users can use administrative views (Desktop view, Administrative Console). Exactly what each user can subsequently see and do there can vary greatly depending on a combination of the following factors:

- The product license keys registered in the iMIS database
- The user class, roles, groups, authorization levels, and access keywords defined in each person's user record

Special restrictions for Casual users

Each iMIS feature has a maximum authorization level that may be granted to a Casual user:

- For Customers, a maximum authorization level of 4 enables Casual users to insert/edit/delete committee participants, tasks, and activity records.
- For AR/Cash, the maximum authorization level of 0 forbids all access to Casual users.
- For all other features of iMIS, the maximum authorization level of 2 enables Casual users to access reports but not financial transactions.
- You cannot assign the SysAdmin role to a Casual user record.

An authorization level of zero is the default for every Casual user that you create.

Existing Casual users that might have been granted higher authorization levels in early releases of iMIS 15 that allowed higher authorization levels will have their authorization levels adjusted down to the new maximum defaults during an upgrade to this release, but those pre-existing Casual users that had authorization levels lower than these maximum levels will remain unchanged.

Conditions required to expose each major feature and its task list items

This list summarizes the conditions needed to display each major iMIS feature and its task list items to a specific user; the details are described in About authorization levels (see "Authorization level privileges (Desktop)"). Access keywords also play a large role in what a user can see and do in iMIS: see "Access Keywords in Customers".

Note: At authorization levels 1 through 3, both Full and Casual users have restricted ability to modify information in most iMIS features.

Authorization level privileges (Desktop)

Authorization levels let you precisely control the iMIS Desktop privileges of individual users. A standard type of privilege (such as Run reports) is associated with each level, but specific windows and fields also become available at certain levels. Note that Casual records are limited: you cannot assign them authorization level 8 or the SysAdmin role.

All authorization level privileges are additive. For example, authorization level 3 automatically gets all of the privileges available at levels 0, 1, and 2.

Note: Access Keywords (see "Access Keywords in Customers") defined in various areas of iMIS constrain these authorizations. For example, one user's authorization level enables her to edit a particular window, but one sensitive field on that window might be read-only or even hidden from her unless her record also contains the specific access keyword that exposes it.

These are the general privileges associated with each authorization level:

0	No access
1	View information
2	Run reports
3	Create and edit records
4	Delete records
5	Maintain tables
6	Change reports
8	Configure features - SysAdmin (see "About authorization levels (Desktop)")

About authorization levels (Desktop)

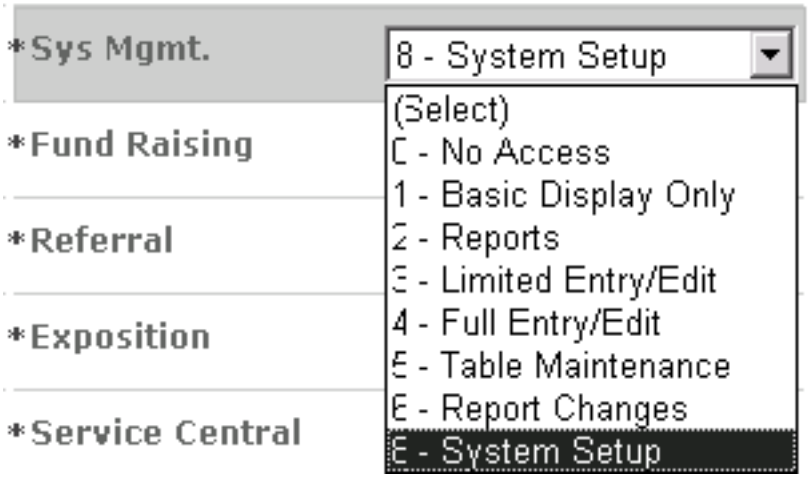
The Sys Mgmt. authorization level grants system administration on iMIS Desktop, as the SysAdmin role (see "User-level security: Roles and Groups") does across the other views. In fact, they are intrinsically paired: If you give a user Level 8 authorization for Sys Mgmt., they automatically join the SysAdmin role; if you remove that Level 8, they automatically drop the SysAdmin role.

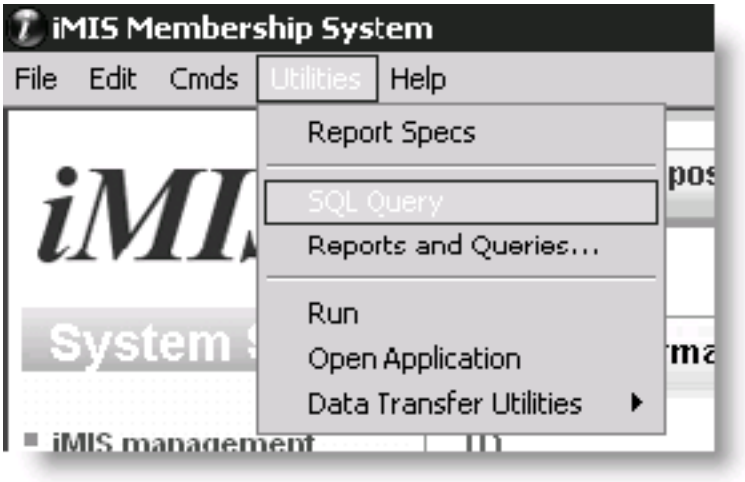
Caution! Do not remove a user's SysAdmin role without also lowering the Sys Mgmt level: parts of the system that consider them an administrator will conflict with the parts that do not. Make sure they have both or neither.

(Upgrades from 10.6) All users who had authorization level 8 in Sys Mgmt. are granted the SysAdmin role.

How Sys Mgmt. levels affect iMIS Desktop access

The Sys Mgmt. authorization level controls what appears on iMIS Desktop menus:





The Sys Mgmt. authorization controls menu access

These are the menu bar privileges associated with each level:

0	No iMIS features appear
1	Licensed features of iMIS appear File > System Setup appears (Full users only)
2	No changes
3	No changes

4	No changes
5	On the File > System Setup window, Organization Names appears (Full users only)
6	No changes
8	Utilities appears (Full users only)

Casual access in iMIS Desktop and staff views

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

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

Contacts and Committees	Customers (see "Access control: Customers")
Find contact or committee	Find and view contact records
Name maintenance [3]	Create and edit contact records [3]
Address maintenance [3]	Delete contact records [4, if enabled]
Call Log activity creation [3]	Manage committees
View activities	Manage chapter rosters
User-defined maintenance	View activity tasks
User Logon / Password maintenance [4]	Find and print duplicates [4]
View Change Log	Run reports, including Word merge [2]
	Import activities (requires [4]
Events	Events (see "Access control: Events (Desktop)")
View events for any contact	
Register any contact with the same Com-	Find and view registrations

pany ID	Run reports [2]
	Exhibition (see "Access control: Exhibition")
	View event records
	Calculate years exhibited
	Run reports [2]
Orders	Orders (see "Access control: Orders")
View orders for any contact	Find and view orders
	Set up warehouses
	Run reports [2]
Fundraising	Fundraising (see "Access control: Fundraising")
View donation history for any contact	
Enter gifts through Rapid Gift Entry	Find and view gifts
	Find and view payments
	Find and view adjustments
	Find and view requests
	Run reports [2]
	Run executive reports [2]
Billing	Billing (see "Access control: Billing")
View or pay billing for self	Find and view payments
	Process accrual dues
	Run reports [2]
	AR/Cash (see "Access control: AR/Cash")
	none

Certification (see "Access control: Certification")

Run reports [2]

Service Central (see "Access control: Service Central")

View customer requests

View payments [2]

View billing records

View orders

View fundraising records

View event records

Exposition (see "Access control: Exposition")

View exposition records

Run reports [2]

Subscriptions (see "Access control: Subscriptions")

All content

Referrals (see "Access control: Referrals")

View referrals

Run reports [2]

Leg. Tracking (see "Access control: Leg. Tracking")

All content

	Issues (see "Access control: Issues")
	View and enter issues
	Run reports [2]
	Xtender (see "Access control: Xtender")
	All content

Access control: Home page (Desktop)

Welcome	Full or Casual user Default view if Check Tasks on Login is not selected in your user record
View activity tasks	Full or Casual user Default view if Check Tasks on Login is selected in your user record
Generate reports	Full or Casual user
View tasks	Full or Casual user
IQA > Contacts	Full user + Customers auth level 2 + Reporting group + MEMBERSHIP license
IQA > Pro-spects	Full user + Customers auth level 2 + Reporting group + MEMBERSHIP and AQMGMT license
IQA > Orders	Full user + Orders auth level 2 + Reporting group + ORDER license
IQA > Events	Full user + Events auth level 2 + Reporting group + MEET license
IQA > Fun-draising	Full user + Fund Raising auth level 2 + Reporting group + FUNDR license

Access control: Customers

User class combined with licensing and the Customers authorization level determines what users can see and do in Customers. Casual users have extended capabilities in

Customers, so the highest authority level they can have here is 4.

Note: The Specific Types field in the Staff Access area of the Users window affects what can be seen and done in the Customers feature, by limiting which customer types the user can edit.

What each user type can do

- Full and Casual users can find and view contact records - auth level 1

  Note: Level 1 users select Manage customers to find and view those records.
- Full and Casual users can manage committees and chapter rosters - auth level 1
- Full and Casual users can run reports - auth level 2
- Full and Casual users can create and edit contact records - auth level 3
- Full and Casual users can delete contact records - auth level 4

  Note: To disable contact record deletion, go to Set up module > General, Basic Options.
- Full and Casual users can find and print duplicate records - auth level 4
- Full and Casual users can import activities (requires keyword) - auth level 4
- Full users can merge duplicate records - auth level 8

What navigation items appear

Manage customers	Full or Casual user + Customers auth level 1 + MEMBERSHIP license
Manage committees	Full or Casual user + Customers auth level 1 + MEMBERSHIP license
Manage chapter rosters	Full or Casual user + Customers auth level 1 + MEMBERSHIP and CHAPTER license
View activity tasks	Full or Casual user + Customers auth level 1 + MEMBERSHIP license
Manage Accumail	Full user + Customers auth level 8 + MEMBERSHIP and ACCU

	license
Manage QAS	Full user + Customers auth level 8 + MEMBERSHIP and QAS license
Manage duplicates	Full or Casual user + Customers auth level 4 + MEMBERSHIP and DMM license
Generate reports	Full or Casual user + Customers auth level 2 + MEMBERSHIP license
Import activities	Full or Casual user + Customers auth level 4 + MEMBERSHIP license An access keyword (see "Access Keywords in Customers") might be required in your user record
IQA > Contacts	Full user + Customers auth level 2 + Reporting group + MEMBERSHIP license
IQA > Prospects	Full user + Customers auth level 2 + Reporting group + MEMBERSHIP and AQMGMT license
Set up tables	Full user + Customers auth level 5 + MEMBERSHIP license
Set up tables > Relationship types	Full user + Customers auth level 5 + MEMBERSHIP and RELATION license
Set up module	Full user + Customers auth level 8 + MEMBERSHIP license
Set up fundraising	Full user + Customers auth level 5 + MEMBERSHIP and FUNDR license
Set up product label preferences	Full user + Customers auth level 5 + MEMBERSHIP license Use Product Label Preferences must be selected in the Customer Setup - Address and Notes window

Access control: Events (Desktop)

User class combined with licensing and the Events authorization level determines what users can see and do within Events. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can find and view event records - auth level 1

  Note: Level 1 users select Register a customer to find and view those records.

- Full and Casual users can run reports - auth level 2
- Full users can create and edit event records - auth level 3
- Full users can delete event records - auth level 4

What navigation items appear

Register a customer	Full or Casual user + Events auth level 1 + MEET license
Define an event	Full user + Events auth level 5 + MEET license
Generate reports	Full or Casual user + Events auth level 2 + MEET license
IQA	Full user + Events auth level 2 + Reporting group + MEET license
Set up tables	Full user + Events auth level 5 + MEET license
Set up module	Full user + Events auth level 8 + MEET license

Access control: Billing

User class combined with licensing and the Dues authorization level determines what users can see and do within Billing. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can find and view billing records - auth level 1

  Note: Level 1 users select Enter and edit payments to find and view those records.

- Full and Casual users process accrual dues - auth level 1
- Full and Casual users can run reports - auth level 2
- Full users can create and edit billing records - auth level 3
- Full users can delete billing records - auth level 4

What navigation items appear

Enter and edit payments	Full or Casual user + Dues auth level 1 + DUES license
Process billing	Full user + Dues auth level 4 + DUES license
Process accrual dues	Full or Casual user + Dues auth level 1 + DUES license + Accrual setup
Generate reports	Full or Casual user + Dues auth level 2 + DUES license
Manage expired members	Full user + Dues auth level 8 + DUES license
Set up module	Full user + Dues auth level 5 + DUES license

Access control: Fundraising

User class combined with licensing and the Fundraising authorization level determines what users can see and do within Fundraising. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can find and view gifts, payments, adjustments, and requests - auth level 1

  Note: Level 1 users select Enter and edit gifts, Process payments, Enter and edit adjustments, and Manage requests to find and view those records.

- Full and Casual users can run reports and executive reports - auth level 2
- Full users can create and edit fundraising records - auth level 3
- Full users can delete fundraising records - auth level 4

What navigation items each user type can see

Enter and edit gifts	Full or Casual user + Fundraising auth level 1 + FUNDR license
Rapid gift entry	Full user + Fundraising auth level 3 + FUNDR license

	Available only if Fundraising is configured to use rapid gift entry
Process payments	Full or Casual user + Fundraising auth level 1 + FUNDR license
Enter and edit adjustments	Full or Casual user + Fundraising auth level 1 + FUNDR license
Process premiums	Full user + Fundraising auth level 4 + FUNDR and ORDER license
Set up appeal expenses	Full or Casual user + Fundraising auth level 1 + FUNDR license
Manage requests	Full or Casual user + Fundraising auth level 1 + FUNDR license
Generate reports	Full or Casual user + Fundraising auth level 2 + FUNDR license
Generate executive reports	Full or Casual user + Fundraising auth level 2 + FUNDR license
IQA	Full user + Fundraising auth level 2 + Reporting group + FUNDR license
Set up tables	Full user + Fundraising auth level 5 + FUNDR license
Set up module	Full user + Fundraising auth level 5 + FUNDR license

Access control: AR/Cash

User class combined with licensing and the AR/Cash authorization level determines what users can see and do within AR/Cash. The highest authority level a Casual user can have here is 0 (none).

What each user type can do

- Full users can only view transactions - auth level 1
- Full users can create transactions, and can edit or delete the transactions that they have created, but not transactions created by other iMIS users - auth level 3
- Full users can edit or delete any transaction - auth level 4
- Full users can enter orders - AR/Cash auth level 1 + Orders auth level 3

What navigation items each user type can see

Enter and edit transactions	Full user + AR/Cash auth level 1 + CASH license
Enter and edit transactions > Import transactions	Full user + AR/Cash auth level 1 + CASH and FSIIMPORT license
Manage batches	Full user + AR/Cash auth level 3 + CASH license Batch management has many complex restrictions; see below.
Credit card reporting	Full user + AR/Cash auth level 8 + CASH and CCAUTH license
Generate reports	Full user + AR/Cash auth level 2 + CASH license
Process month-end procedures	Full user + AR/Cash auth level 4 + CASH license
Print Transaction Journal	Full user + AR/Cash auth level 2 + CASH license
Set up tables	Full user + AR/Cash auth level 5 + CASH license
Set up module	Full user + AR/Cash auth level 8 + CASH license
Enter and edit Orders	Full user + AR/Cash auth level 1 + CASH license and not licensed for ORDER
Generate order reports	Full user + AR/Cash auth level 1 + CASH license and not licensed for ORDER

How authorization affects batches

The AR/Cash authorization level determines your privileges in working with batches that appear across iMIS.

Note: The following descriptions concerning batch management features assume that AR/Cash batch control is enabled. See "AR/Cash Batch Control window".

Note: For authorization levels 3 through 7, if batch management is configured to hide batches created by other users, the only batches that you can view and work with in the Manage Batches and Open Batches windows are your own.

- AR/Cash auth level 0

If batch management is configured to hide batches created by other users, no batches are visible in the Open Batches window that appears in other features of iMIS. Otherwise, the following batch management privileges are globally available in the Open Batches window:

- View, select, and print batches that are open or ready.
- Filter batches by date.
- Switch to a different batch, if the batch is open.
- AR/Cash auth level 2

  If batch management is configured to hide batches created by other users, no batches are visible in the Open Batches window. Otherwise, you can view, select, and print closed batches in the Open Batches window.
- AR/Cash auth level 3

  Manage batches becomes available in the task list for AR/Cash, and you can perform the following batch management tasks from the Manage batches and Open Batches windows:
- You can create batches and change only your open/ready batches as follows:
- Edit the Descr field.
- Change the state from open to ready, or from ready to open, with Set Ready/Open.
- Additionally, if a batch is yours, is open/ready, and contains no transactions, you can:
- Delete the batch.
- Select a new value from the Cash Table list (which updates the Cash Account field).
- Edit the following fields: Date, Control Count, Control Amount
- AR/Cash auth level 4

  You can perform the following batch management tasks from the Manage batches and Open Batches windows:

- You can change any open/ready batch as follows:
- Post the batch.
- Edit the following fields: Date, Descr, Control Count, Control Amount
- Change the state from open to ready, or from ready to open, with Set Ready/Open.
- Additionally, if a batch is open/ready and contains no transactions, you can:
- Delete the batch.
- Select a new value from the Cash Table list (which updates the Cash Account field).
- AR/Cash auth level 8

  You can perform the following batch management tasks from the Manage batches and Open Batches windows:

- View, select, and print any batch, even when batch management is configured to hide batches created by other users.
- Change the status of any batch from open or ready to posted/closed with the Posted/Closed option.
- Change the status of any batch from posted/closed to open or ready with the Open or Ready options.
- Delete any closed batch that contains transactions.

  Note: (if General Ledger is enabled) Before deleting a batch that contains transactions, you must export it to the General Ledger.

  Access control: Orders

  User class combined with licensing and the Orders authorization level determines what users can see and do within Orders. The highest authority level a Casual user can have here is 2.

  What each user type can do

- Full and Casual users can find and view orders - auth level 1

Note: Level 1 users select Enter and edit orders to find and view those records.

- Full and Casual users set up warehouses - auth level 1
- Full and Casual users can run reports - auth level 2
- Full users can create and edit orders - auth level 3
- Full users can delete orders - auth level 4

What navigation items appear

Enter and edit orders	Full or Casual user + Orders auth level 1 + ORDER license
Process orders	Full user + Orders auth level 4 + ORDER license
Manage inventory	Full user + Orders auth level 4 + ORDER license
Generate reports	Full or Casual user + Orders auth level 2 + ORDER license
IQA	Full user + Orders auth level 2 + Reporting group + ORDER license
Set up tables	Full user + Orders auth level 5 + ORDER license
Set up warehouses	Full or Casual user + Orders auth level 1 + ORDER license + set up for multiple warehouses
Set up module	Full user + Orders auth level 8 + ORDER license

Access control: Certification

User class combined with licensing and the Certification authorization level determines what users can see and do within Certification. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can run reports - auth level 2
- Full users can create and edit certification records - auth level 3
- Full users can delete certification records - auth level 4

What navigation items appear

Register a student	Full user + Certification auth level 3 + CERT license
Set up programs	Full user + Certification auth level 4 + CERT license
Set up Components	Full user + Certification auth level 3 + CERT license
Generate reports	Full or Casual user + Certification auth level 2 + CERT license
Set up tables	Full user + Certification auth level 5 + CERT license
Set up module	Full user + Certification auth level 8 + CERT license

Access control: Service Central

User class combined with licensing and specific authorization level determines what users can see and do within Service Central. The highest authority level a Casual user can have here is 2, but they are still forbidden from accessing AR/Cash transactions in Service Central.

What each user type can do

Service Central:

- Full and Casual users can find and view customer requests - auth level 1
- Full and Casual users can find and view payments - auth level 2
- Full users can create and edit customer requests and payments - auth level 3
- Full users can delete customer requests and payments - auth level 4

Dues:

- Full and Casual users can find and view billing records - auth level 1
- Full users can create and edit billing records - auth level 3
- Full users can delete billing records - auth level 4

AR/Cash:

- Full users can find and view transactions - auth level 1
- Full users can create transactions, and can edit or delete the transactions that they have created, but not transactions created by other iMIS users - auth level 3
- Full users can edit or delete any transaction - auth level 4

Orders:

- Full and Casual users can find and view orders - auth level 1
- Full users can create and edit orders - auth level 3
- Full users can delete orders - auth level 4

Fundraising:

- Full and Casual users can find and view fundraising records - auth level 1
- Full users can create and edit fundraising records - auth level 3
- Full users can delete fundraising records - auth level 4

Events:

- Full and Casual users can find and view event records - auth level 1
- Full users can create and edit event records - auth level 3
- Full users can delete event records - auth level 4

What navigation items appear

Process customer requests	Full or Casual user + Service Central auth level 1 + SERVCEN license
Process billing	Full or Casual user + Service Central auth level 1 + Dues auth level 1 + SERVCEN and DUES license
Register a customer	Full or Casual user + Service Central auth level 1 + Events auth level 1 + SERVCEN and MEET license
Enter and edit	Full or Casual user + Service Central auth level 1 + Fund Raising auth

gifts	level 1 + SERVCEN and FUNDR license
Process sales transactions	Full user + Service Central auth level 1 + AR/Cash auth level 1 + SERVCEN and CASH license
Process orders	Full or Casual user + Service Central auth level 1 + Orders auth level 1 + SERVCEN and ORDER license
Enter and edit payments	Full or Casual user + Service Central auth level 2 + SERVCEN license
Generate reports	Full or Casual user + Service Central auth level 2 + SERVCEN license

Access control: Exhibition

User class combined with licensing and the Events authorization level determines what users can see and do within Exhibition. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can only view event records - auth level 1

  Note: Level 1 users select Process orders to find and view those records.

- Full and Casual users can calculate years exhibited - auth level 1
- Full and Casual users can run reports - auth level 2
- Full users can create and edit event records - auth level 3
- Full users can delete event records - auth level 4

What navigation items appear

Process orders	Full or Casual user + Events auth level 1 + EXHIBITION license
Manage prospect list	Full user + Events auth level 4 + EXHIBITION license
Generate reports	Full or Casual user + Events auth level 2 + EXHIBITION license

Calculate years exhibited	Full or Casual user + Events auth level 1 + EXHIBITION license

Access control: Exposition

User class combined with licensing and the Exposition authorization level determines what users can see and do within Exposition. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can find and view exposition records - auth level 1

  Note: Level 1 users select Process booth orders to find and view those records.

- Full and Casual users can run reports - auth level 2
- Full users can create and edit exposition records - auth level 3
- Full users can delete exposition records - auth level 4

What navigation items appear

Process booth orders	Full or Casual user + Exposition auth level 1 + EXPO license
Set up an exposition	Full user + Exposition auth level 5 + EXPO license
Manage prospect lists	Full user + Exposition auth level 4 + EXPO license
View exhibitor information	Full user + Exposition auth level 4 + EXPO license
Manage wait lists	Full user + Exposition auth level 4 + EXPO license
Manage booth preferences	Full user + Exposition auth level 4 + EXPO license
Process EXPOCAD	Full user + Exposition auth level 4 + EXPO and EXPOCAD license
Generate reports	Full or Casual user + Exposition auth level 2 + EXPO license
Set up tables	Full user + Exposition auth level 5 + EXPO license

Set up module	Full user + Exposition auth level 8 + EXPO license

Access control: Subscriptions

All content	Full or Casual user + SUBSC license

Access control: Referrals

User class combined with licensing and the Referral authorization level determines what users can see and do within Referrals. The highest authority level a Casual user can have here is 2.

What each user type can do

- Full and Casual users can find and view referrals - auth level 1

  Note: Level 1 users select Manage referrals to find and view those records.
- Full and Casual users can run reports - auth level 2
- Full users can create and edit referrals - auth level 3
- Full users can delete referrals - auth level 4

What navigation items appear

Manage referrals	Full or Casual user + Referral auth level 1 + REFERRAL license
Generate reports	Full or Casual user + Referral auth level 2 + REFERRAL license
Set up module	Full user + Referral auth level 8 + REFERRAL license
Create referral orders	Full user + Referral auth level 5 + REFERRAL license
Delete expired...	Full user + Referral auth level 5 + REFERRAL license
Rebuild search indexes	Full user + Referral auth level 5 + REFERRAL license

Access control: Leg. Tracking

All content	Full or Casual user + LEGTRACK license

Access control: Issues

User class combined with licensing determines what users can see and do within Issues.

Note: No specific authorization codes apply to this module.

What each user type can do

- Full and Casual users can view and enter issues
- Full and Casual users can run reports
- Sysadmin roles can start the email server and set up the module

What navigation items appear

View and enter issues	Full or Casual user + SERVICE license
Generate reports	Full or Casual user + SERVICE license
Start e-mail server	Full user + SysAdmin role + SERVICE license
Set up module	Full user + SysAdmin role + SERVICE license

Access control: Xtender

All content	Full or Casual user + XTEND license

Access Keywords in Customers

Many organizations want to limit the information their users can access. Customers allows you to define and establish parameters that limit the entering, editing, and viewing of confidential information to authorized users only.

User access and authorization are established using authorization levels, security models, and access keywords. Authorization levels provide general, module-wide access controls. Access keywords provide additional levels of security within modules and allow you either to hide information completely or to make information read-only, so that only authorized users are allowed to change information.

Creating Access Keywords

You implement access keyword security in three stages:

1. Create and populate the ACCESS_KEYWORDS general lookup/validation table.
2. Assign the access keywords to the customer information areas you wish to secure. The customer information areas to which access keywords can be assigned include:

- Custom windows
- Reports
- Activity records
- Financial tab within Customers
- Fundraising tab within Customers
- Customer address information
- Customer status information

3. Assign one or more access keywords to each user to enable access to the protected information.

   Note: You need a Sys mgmt authorization level of 8 and database owner privileges to assign access keywords.

   To create access keywords

1. Create a general lookup/validation table named ACCESS_KEYWORDS.
2. Enter access keywords according to these restrictions:

- Do not enter an Expansion for access keywords.
- To hide custom windows from certain users, add the keyword HIDDEN.

3. Restart iMIS Desktop after creating the access keywords.

   Limiting access to or hiding custom windows

   Custom (user-defined) windows can store detailed information about your customers such as annual salary, major gifts, and political affiliations. However, you might not want all system users to view this information or to enter or edit information in the custom window.

The iMIS Desktop client allows you to assign access keywords that allow only certain users to view or to enter and edit information on custom windows. You can apply the access keywords to custom windows on a tab-by-tab basis.

How access can be limited

- For single-instance user-defined tabs, if an access keyword has been set up for that tab (other than HIDDEN), and the user has no access keywords assigned, then the tab will display but will not allow editing or inserting.
- If the HIDDEN access keyword is setup for the tab, and the user has no access keywords assigned, then the tab will not display.
- If a multi-instance window has an access keyword associated with it, only users that have the matching access keyword and a Customers authorization level of three or higher will be permitted to edit the tab; the tab will display in read-only mode for users who do not have the matching access keyword. If the tab has more than one access keyword associated with it, the user must have at least one matching access keyword for the tab to display in enter/edit mode.
- If a multi-instance window has one or more access keywords associated with it, including the HIDDEN keyword, the tab will only be visible to users who have at least one of the access keywords. The tab will not display for users who do not have one of the assigned keywords in their profile.
- If a multi-instance window does not have any access keywords associated with it, any user is permitted to view the tab. If there are customer type restrictions on the underlying table, these will be honored as usual; the tab will be disabled if the current customer type does not have permissions to access the tab.

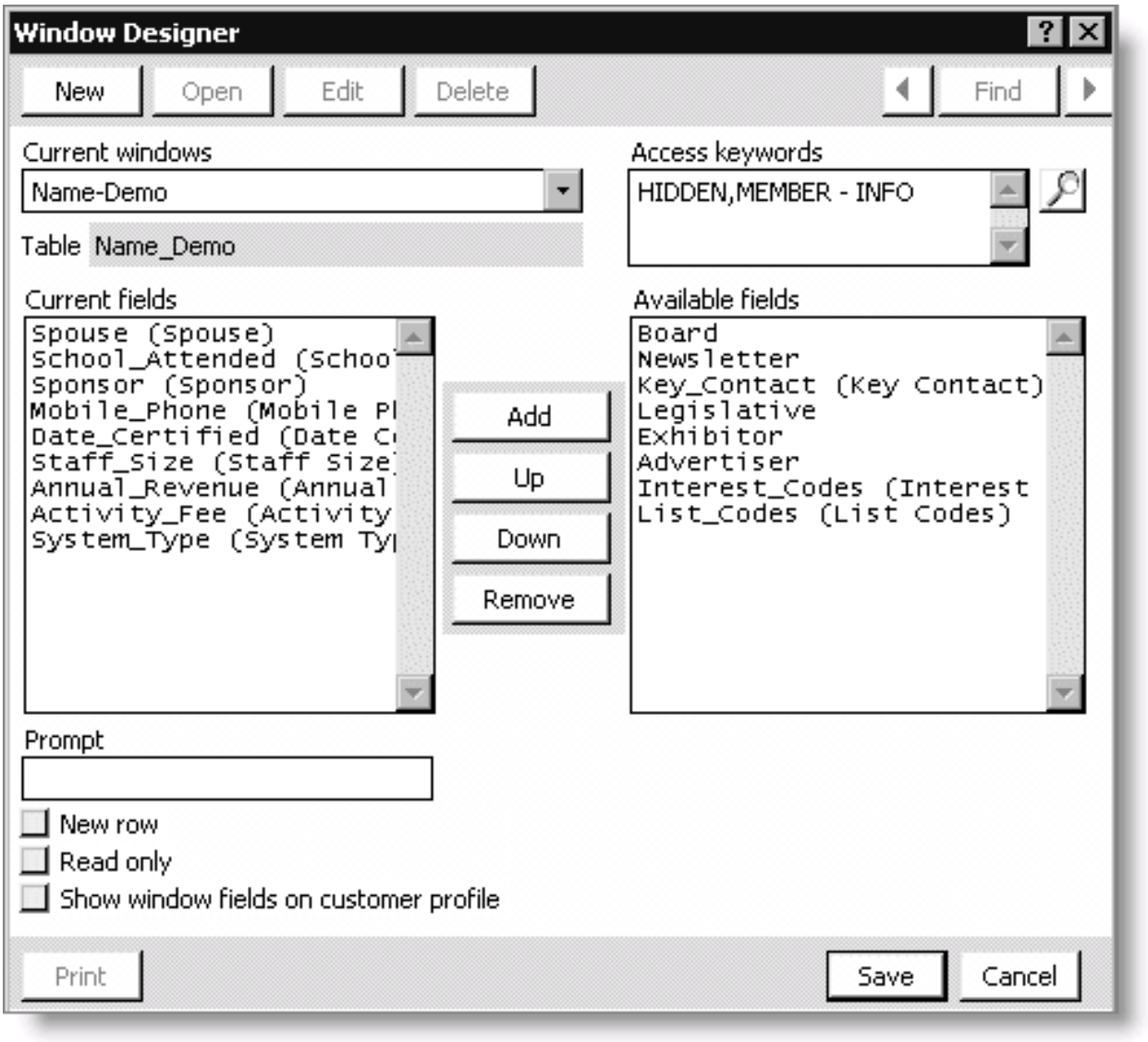
To limit access to or hide custom windows

1. Create keywords (see "Creating Access Keywords") in the ACCESS_KEYWORDS lookup table.
2. From Customers, select Set up module > General, and click Additional Windows to open the Customer Setup – Additional Windows window.

3. Click Define Windows to open the Window Designer window.
4. Select the desired user-defined window from the Current windows drop-down list.
5. Click the Find icon to the right of the Access keywords field to select from the available access keywords. You can assign access keywords to user-defined windows in three ways:

- Assign one or more access keywords to the window, but not the reserved keyword HIDDEN. All users will be able to see the window, but only those with one of the access keywords will be able to enter and edit information in the window.
- Assign both the reserved keyword HIDDEN and one or more access keywords to the window. The window will be hidden from all users except those who have one of the access keywords for the window.
- Do not assign the reserved keyword HIDDEN or any access keywords to the window. Everyone will be able to see the window, and everyone will be able to enter and edit information in the window.

6. Double-click the selected keyword(s) to move the keyword(s) from the Available field to the Selected field.
7. Click OK. The selected keywords display in the Access Keywords field.
8. Click Save.
9. Assign the keywords to the user (see "Assigning Access Keywords to users").



Limiting access to reports

The iMIS Desktop client allows you to assign access keywords that allow only authorized users to see or print a report. A report that is assigned an access keyword will not display in the window unless you assign the user the same keyword.

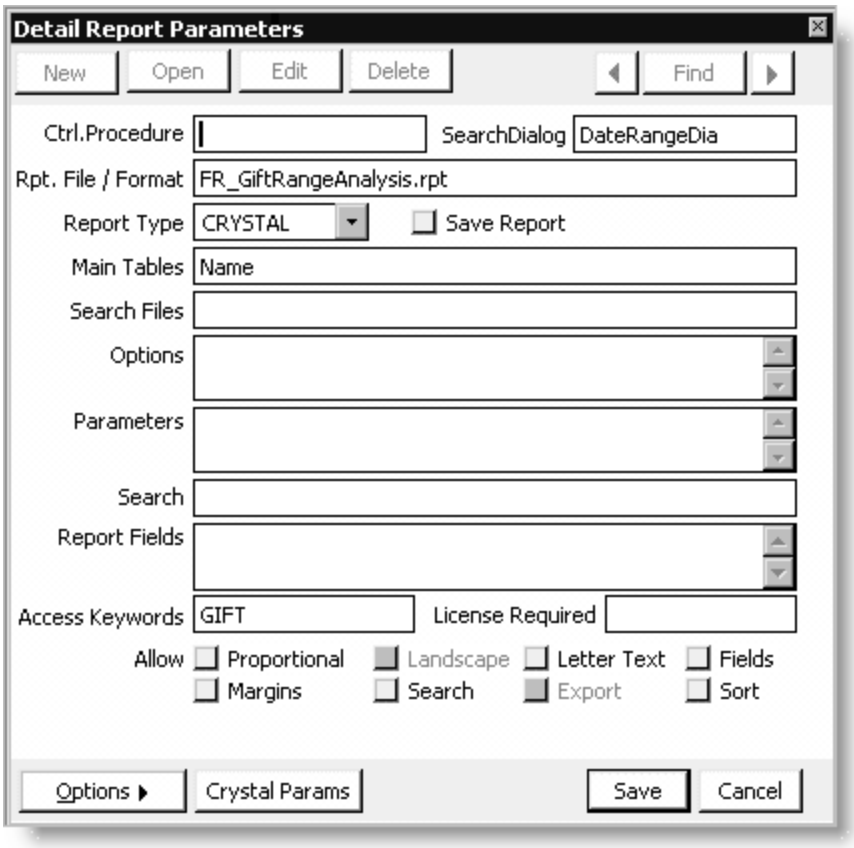
Note: You must have a Sys mgmt authorization level of 8 or greater to assign keywords to reports.

To limit access to reports

1. Create the keywords in the ACCESS_KEYWORDS lookup table.

2. Select Utilities > Report Specs to open the Report Specifications window.
3. Select the report to which you want to assign an access keyword from the list of available reports.
4. Click Edit.
5. Click Parameters on the Report Specifications window to open the Detail Report Parameters window.
6. Place your cursor in the Access Keywords field on the Detail Report Parameters window. Press Ctrl+L to open the Select ACCESS_KEYWORDS value(s) window.
7. Select each keyword that you want to assign to the report in the Available field and double-click to move the keyword to the Selected field.
8. Click OK. The selected keyword(s) displays in the Access Keywords field on the Detail Report Parameters window.
9. Click Save.
10. Assign keywords to the user (see "Assigning Access Keywords to users").

    Note: Make sure to assign the same keyword(s) to the users who will be authorized to access the report(s).



Example of a keyword assigned to a report

Limiting access to activity records

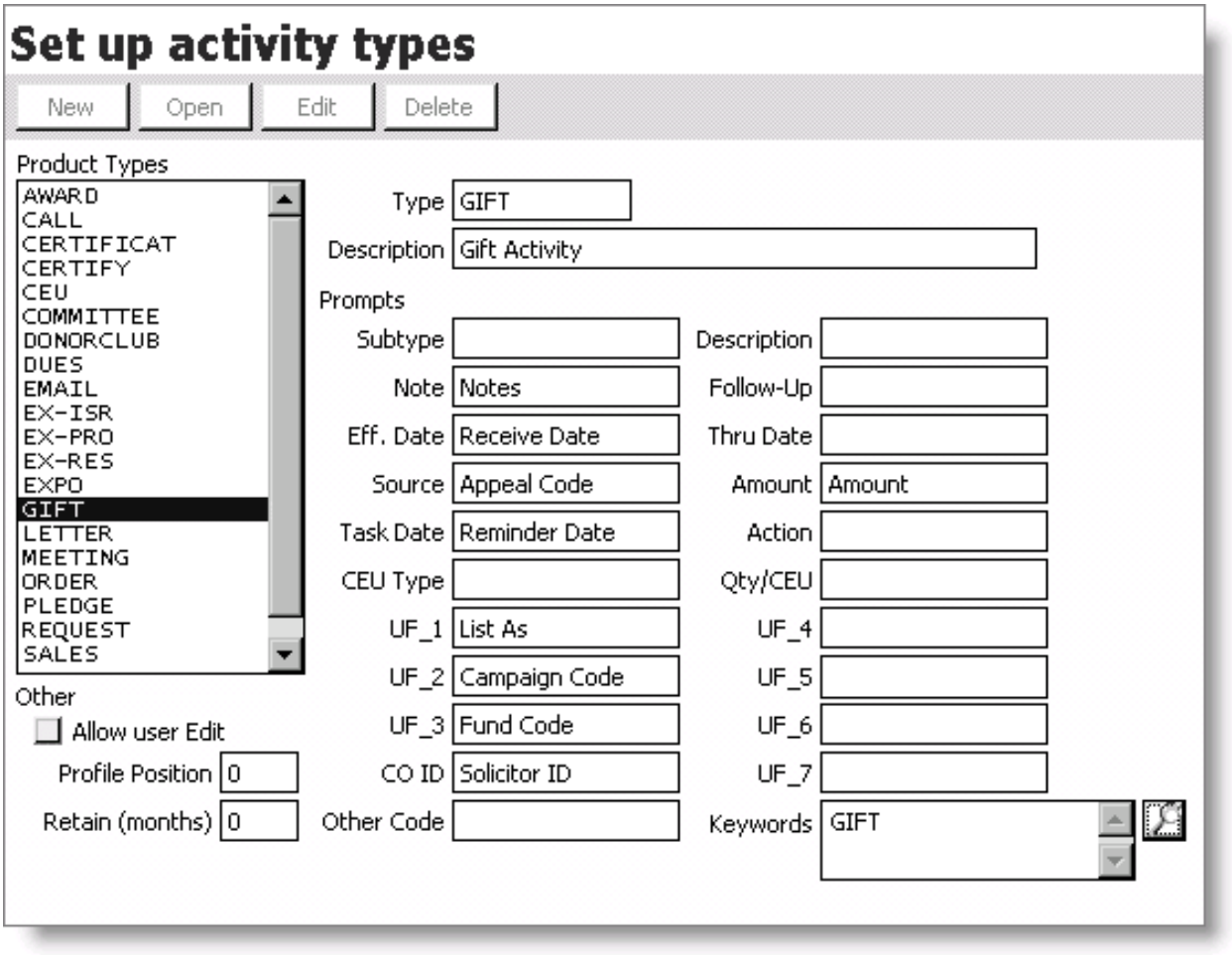
iMIS Desktop allows you to assign access keywords to activity records. Only authorized users are allowed to enter, edit, and view customers' activity records. Access keywords are assigned to activity records on the Set up activity types window.

To limit access to activity records

1. Create the keywords (see "Creating Access Keywords") in the ACCESS_KEYWORDS lookup table.
2. From Customers, select Set up module > Activity types to open the Set up activity types window.
3. Select the activity type that you want to assign an access keyword from the Product Types list.
4. Click Edit.

5. Click the Find icon displayed to the right of the Keywords field to open the Select ACCESS_KEYWORDS value(s) window.
6. Select each keyword that you want to assign in the Available field and double-click to move the keyword to the Selected field.
7. Click OK. The selected keyword(s) displays in the Keywords field on the Set up activity types window.
8. Click Save.
9. Assign keywords to the user (see "Assigning Access Keywords to users").

   Note: After the access keywords are assigned on the Set up activity types window, the activity will not display in a customer's activity window unless the user has been assigned at least one of the access keywords.



Limiting access to customer data

The Access Keys window provides the ability to configure access to the following customer data areas:

- Activity Importer functionality
- Financial data
- Address data
- Status data
- Fundraising History data

To assign access keywords to customer data

1. From Customers, select Set up module > General to open the Set up general options window.
2. Click Access Keys to open the Customer Setup – Access Keys window.
3. Click Edit.
4. Place your cursor in the field you want to modify.
5. Click the Find icon to open the Select ACCESS_KEYWORDS value(s) window.
6. Double-click the keyword in the Available field to move it to the Selected field.
7. Click OK to save the information and return to the Customer Setup –Access Keys window.

   The keyword now displays in the field you selected.
8. Click Save to update the record.

To limit access to the Activity Importer

Unlike the other areas that you can control from the Access Keys window, access to Activity Importer functionality is controlled by a combination of three controls:

- Authorization level
- User-defined access keywords - Users who have one of the access keywords allowing access to the Activity Importer but who do not have the SQLQuery access keyword will have access to the Activity Importer, but will not be able to access its advanced features.
- The SQLQuery access keyword – an iMIS reserved word that controls whether the Input from Query and Transformation Query fields on the Import activities window are enabled.

  Note: If a user has the SQL Query keyword and the appropriate authorization level, the Transformation Query field is automatically populated with SQL text and the current user's identifier (the UserID_Date value). This information must be present when the user clicks the Optional Step 3 –Transform button. If any part of the default information is missing, an error displays informing the user which part of the SQL script is missing.

  Access to Activity Importer by Keyword and Authorization Level

0 – 3	Import activities task list item not enabled; user cannot use Activity Importer			
4 – 7	Import activities task list item displays but user cannot access Activity Importer	Import activities task list item displays and user can access Activity Importer	Import activities task list item displays; user can access Activity Importer but cannot use advanced query features	User can access and use all Activity Importer features
8	Import activities task list item displays and user can access Activity Importer		Import activities task list item displays; user can access Activity Importer but cannot use advanced query fea-	User can access and use all Activity Importer features

tures

To limit user access to the Activity Importer, you must perform the following steps:

1. Create or add keywords to the ACCESS_KEYWORDS general lookup/validation table (see "Creating Access Keywords").
2. Assign access keywords to Activity Importer (see "Limiting access to customer data").
3. Assign access keywords to users (see "Assigning Access Keywords to users").

Note: You must have a Sys mgmt authorization level of eight (8) or higher and database privileges to assign access keywords.

To limit access to customer financial data

The iMIS Desktop client allows you to assign access keywords that allow only authorized users to edit the customer financial information found on the Financial tab.

1. Create or add keywords to the ACCESS_KEYWORDS general lookup/validation table (see "Creating Access Keywords").
2. Assign access keywords to Financial data (see "Limiting access to customer data").
3. Assign access keywords to users (see "Assigning Access Keywords to users").

Note: After the access keywords are assigned on the Customer Setup – Access Keys window, customer financial information cannot be edited unless the user has been assigned at least one of the access keywords. The financial information is read-only for users with Customers authorization level of 1 or higher.

To limit access to the Fundraising tab

iMIS Desktop allows you to assign access keywords that allow only authorized users to view and edit customer fundraising information. The Fundraising Access keyword does not control viewing of Fundraising invoices in Service Central.

1. Create or add keywords to the ACCESS_KEYWORDS general lookup/validation table (see "Creating Access Keywords").
2. Assign access keywords to fundraising data (see "Limiting access to customer data").
3. Assign access keywords to users (see "Assigning Access Keywords to users").

Note: After the access keywords are assigned on the Customer Setup – Access Keys window, customer fundraising data cannot be edited unless the user has been assigned at least one of the access keywords.

To limit access to customer address information

iMIS Desktop allows you to assign access keywords so that only authorized users can enter and edit customer address information.

The authorization limits entry and editing of customer addresses in the Customers feature.

The limitations also extend to the Address, City, St/Prov, Zip, Home, Work, Fax, and E-mail fields on the Donor tab of the Enter and edit gifts window and on the Gift – Name/Address – Soft Credit window and the customer congressional district information (US Congress, St Senate, St House) found in the Other tab (from Customers, select Manage customers, find the customer record, and select the Other tab).

The address access key prevents entry on the address fields on both the Customers and Fundraising tabs when entering or editing a gift. If the user does not have the address access keyword, the customer address is never updated even if the user has the update option set in Customers.

1. Create or add keywords to the ACCESS_KEYWORDS general lookup/validation table (see "Creating Access Keywords").

2. Assign access keywords to Address (see "Limiting access to customer data").
3. Assign access keywords to users (see "Assigning Access Keywords to users").

   Note: After Name Addresses Edit access keywords are assigned on the Customer Setup – Access Keys window, customer address information cannot be entered or edited unless the user has been assigned the appropriate access keyword.

   To limit access to customer status information

   iMIS Desktop allows you to assign access keywords so that only authorized users can enter new donors and soft credits and edit the following:

- Customer Type field on the Manage customers window, Donor tab of the Enter and edit gifts window, and on the Gift - Name/Address – Soft Credit window (from Fundraising, select Enter and edit gifts, open an existing gift or pledge, and click the Edit button displayed to the right of the Soft Credit field).
- Status and Category fields on the Manage customers window
- Join Date and Paid Through Date fields on the Status tab on the Manage customers window

1. Create or add keywords to the ACCESS_KEYWORDS general lookup/validation table (see "Creating Access Keywords").
2. Assign access keywords to Financial data (see "Limiting access to customer data").
3. Assign access keywords to users (see "Assigning Access Keywords to users").

   Note: After a Name Status Edit access keyword is assigned on the Customer Setup – Access Keys window, new donors and soft credits cannot be entered and the Customer Type, Status, Category, Join Date, and Paid Through Date fields cannot be edited unless the user has been assigned the appropriate access keyword.

   ##### Assigning Access Keywords to users

   After the ACCESS_KEYWORDS table has been created and you have assigned access keywords for the windows and data to which you want to limit access, you can assign

access keywords to the users that you want to allow to access customer information. Access keywords are assigned to users through iMIS System Setup.

To assign access keywords to users

You may limit user access (see "Access Keywords in Customers") to information in the Customers feature of the administrative view.

Note: You must create access keywords before you assign them to user records.

1. Log on to iMIS as MANAGER.
2. From System Setup, select Security administration > Users.
3. Find a Full or Casual user and open their user record.
4. In the bottom half of the User Access area of the Users window, enter one or more access keywords in the Access Keywords field, or click the Find icon to select keywords.

   Note: If you create access keywords and apply them to specific areas in Customers, but do not specify the keywords in a user record, that user cannot enter or edit information in those areas of Customers.
5. Click Save.

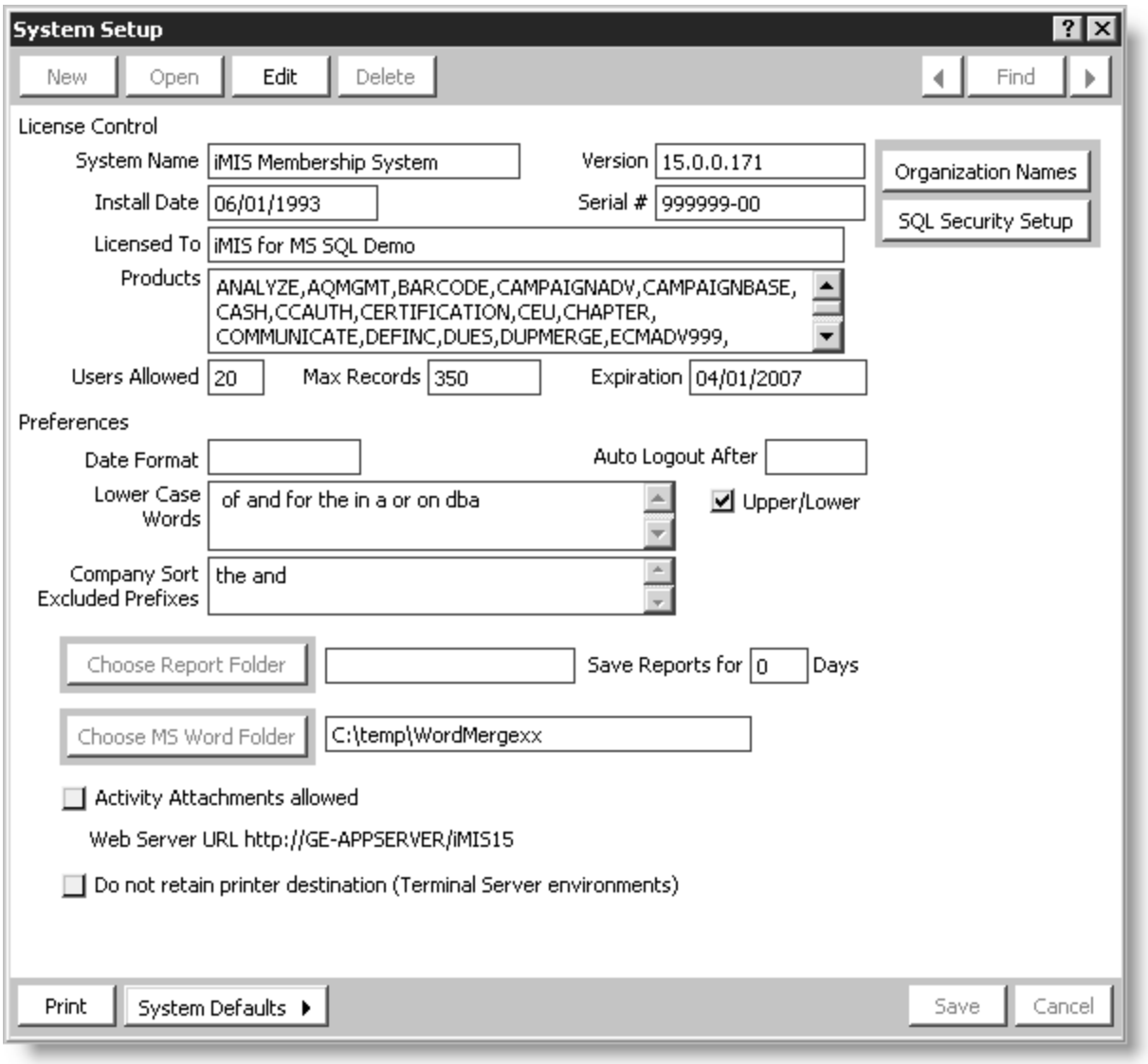
   Exit and restart iMIS Desktop.

System Setup (File menu)

The System Setup provides configuration options for a variety of iMIS features. You enter the license information here when you install iMIS for the first time, and you may need to modify the license information if you purchase additional iMIS modules or upgrades.

In addition to modifying the license control, the System Setup window is where you set Organization Names and SQL Security.

System Setup window



From File, select System Setup

License Control

The following information should be entered from the data on the license sheet that accompanies an order.

- System Name – The title you want displayed on the main iMIS window
- Version – The current version of iMIS installed
- Install Date – The date the current version was installed
- Serial # – The number located on the iMIS CD

- Licensed To – Company name in which iMIS is licensed
- Products – The list of current features installed
- Users Allowed – The number of users allowed to access iMIS at one time
- Max Records – The maximum number records allowed for the license
- Expiration – The license expiration date

Organization Names

Opens the Organization Names window where you can enter logos and addresses for each organization. This is also where the taxation method for the organization is selected.

SQL Security Setup

Opens the SQL Security Setup window where you can set database passwords.

Preferences

- Date Format – (defaults to D/M/CY) If needed, override the default date format.
- Auto Logout After – Specifies a time, such as the end of your normal business hours, when you want iMIS to automatically log out any logged-in but inactive users. The logout will not interfere with users in the middle of actions or procedures in iMIS; rather, it waits for a period of inactivity (no keystrokes, mouse movements) before logging off the user. Those wanting to work later that this “auto logout” hour can log back in and work undisturbed.
- Lower Case Words – Specifies a list of words that you do not want capitalized
- Company Sort Excluded Prefixes - The list of prefixes to ignore when sorting company names, which can include prefixes in foreign languages.
- Upper/Lower – Select this option to allow iMIS to automatically apply capitalization rules to name and address fields so that the text appears in Title (upper and lower) case. When you enter text into these fields, iMIS will capitalize the first letter of each word, except for the words listed in the Lower Case Words field. For example, if you entered “the

university of texas at austin," iMIS would format it as The University of Texas at Austin.

- Choose Report Folder – Used to enter the location where stored Crystal reports are saved and accessed through the Print Manager (File > Print Manager).
- Save Reports for __ Days – Specifies the default number of days to store Crystal reports in the Print Manager. If a different period is specified in the Detail Report Parameters window of the report, the days set in the report overrides the System Setup.
- Choose MS Word Folder – Used to enter the location where MS Word templates are stored and accessed.
- Activity Attachments allowed – Select this option to enable the activity attachment feature that enables you to attach a file to an activity record and save it to the iMIS database. For example, you can attach a Microsoft Word document, PowerPoint slide presentation, spreadsheet, graphic, e-mail file, or HTML page. Once the file is saved to the iMIS database, you can open it on your system using the associated application and view, modify, or delete it from within iMIS.
- Web Server URL – Specifies the URL of your iMIS application server.
- Do not retain printer destination (Terminal Server environment) – Select this option if you do not want iMIS to store the path to your default printer in the database (for example, if you access iMIS through a Terminal Server or Citrix connection that may append a network identifier to the path to your default printer, causing iMIS to designate your printer setting as invalid), you can select the Do not retain printer destination (Terminal Server environments) option on the System Setup window (select File > System Setup). When you enable this option, iMIS does not save the path to your default printer destination to the database. You will still be able to print to your default printer when you select the Printer option on the Report Destination window. If when starting a subsequent session iMIS detects a conflict with your printer setting (for example, if you select a different default printer), an error message will display and you will be able to select a valid printer. You can also click the Reset All button to clear any existing report destination values.

  Note: You must have a default printer specified on your workstation to access the Print Setup (select File > Print Setup) and Report Destination window.

System Defaults button

Used to Change Font Tables and access Help Options menu items.

When the Help Options menu item is selected, the Help Options window opens where you can select (enable) or deselect (disable) the following options:

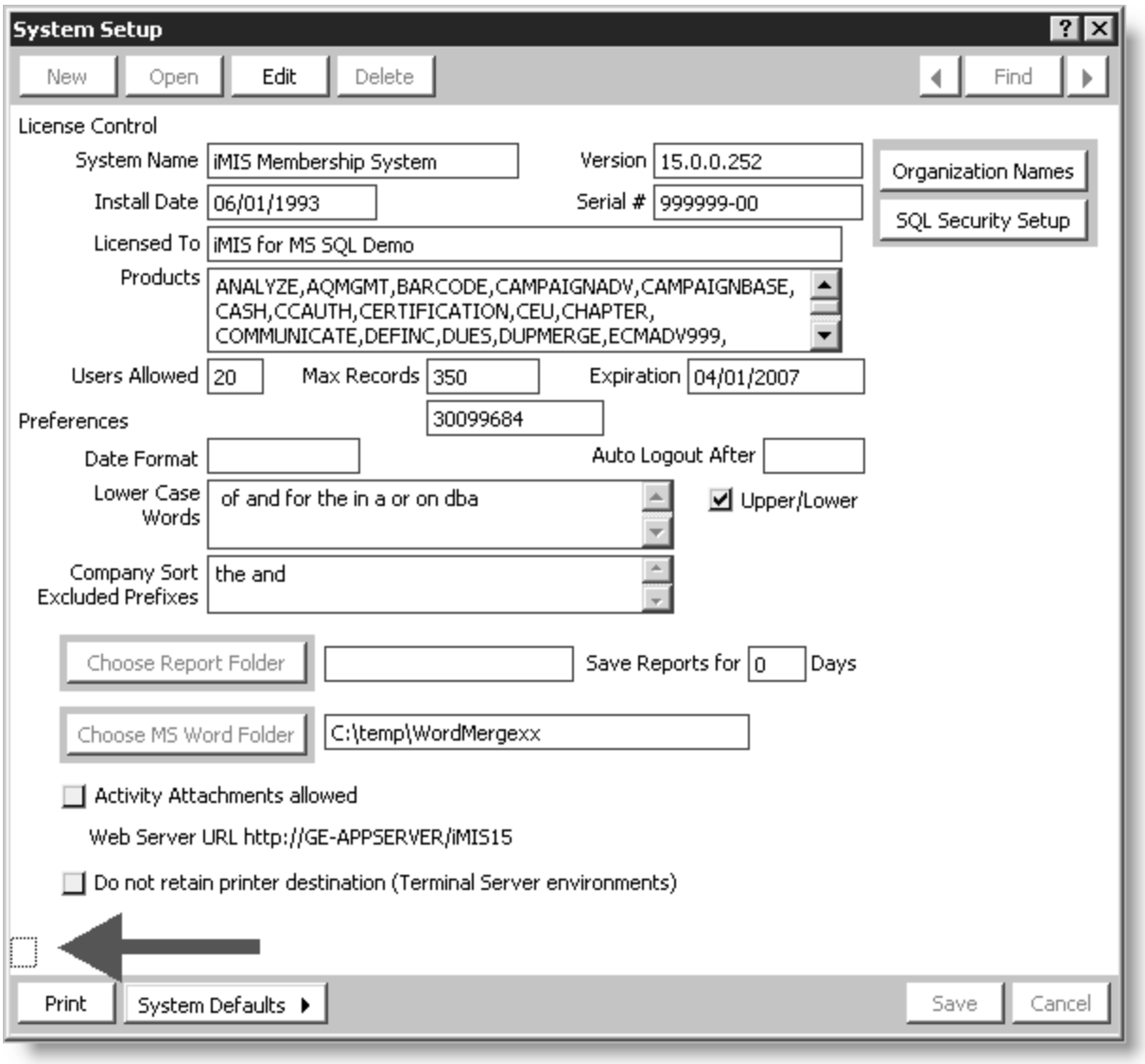
- Help bar on – A dynamic, field-specific help line in the status bar at the bottom of the iMIS main window displays. This option must be enabled for the status bar to display. For example, when the cursor is positioned over the Joined Date field of the Name Maintenance window, the status bar displays Date membership began as additional information to help you know what to enter in the field.
- Show help codes – Internal help codes display the associated iMIS table and columns. For example, when the cursor is positioned over the Join Date field in the Name Maintenance window, the status bar displays the Name.JOIN_DATE.

Modifying license configuration

You must modify your license configuration whenever you purchase new iMIS features or add users to an existing license. Have your updated license sheet (license key information) handy.

To modify the license configuration

1. Select File > System Setup to open the System Setup window.
2. Click in the lower left corner of the window until the hidden control button appears.
3. Click Edit.
4. Enter the license information exactly as shown on the license key.
5. Click Save.



Defining the date/time format for iMIS

The Date Format field in the System Setup window is blank by default, which causes iMIS to use the U.S. English short date and time formats used in most U.S.-based computers. For example:

- 11/16/2007 is the short date format that represents November 16, 2007
- 2:16:26 PM is the time format that represents 14:16:26

Tip: Use a format that displays the entire four-digit year so that users can verify the correct century. iMIS typically assumes a year of 29 or less to refer to the 21st century

(30/3/22 = 30 March 2022) and 30 or higher as the 20th century (30/3/30 = 30 March 1930).

Formatting date/time outside the United States

Whenever you have the operating system of an iMIS server set for a region other than U.S. English, be sure to specify a matching Date Format in iMIS. The region is set through Control Panel > Regional and Language Options, Regional Options.

For example, if the server specifies English (United Kingdom) for the regional language, 16/11/2007 for the Short date format, and 14:16:26 for the Time format, you must make iMIS match by specifying D/M/CY H:N:S in iMIS.

To define the date/time format for iMIS

1. Log on to iMIS Desktop with the MANAGER logon.
2. Choose File > System Setup.
3. Click Edit.
4. In the Date Format field, specify a combination of variables that represents the Short date and Time formats used by the operating system of the iMIS application server. Examples:

- m D CY H:N.S.s returns "JUN 12 2008 15:45.00.00"
- D m Y H:N A returns "12 JUN 08 3:45 PM"
- M/D/Y H.N returns "06/12/08 15.45"
- YMD returns "080612"

Refer to the table below for details.

5. Click Save.
6. Restart iMIS.

Y	Year, 2-digit	99
y	Year with Century, 4-digit	1999
C	Century, 2-digit	19
M	Month, numeric	06
m	Month, 3-character abbr. In caps	JUN
D	Day of month, cardinal	12
d	Day of month, ordinal	12th
W	Day of week, numeric, Sunday=0, Saturday=6	5
w	Day of week, full name	Friday
H	Hour of day, 24-hour format	0-23
h	Hour of day, 12-hour format	1-12
N	Minutes, 2-digit, with leading zero	07
S	Seconds, 2-digit, with leading zero	02
s	Hundredths of seconds, 2-digit	37
A	AM/PM, all caps	AM

Changing the font table

The font table controls the fonts that are used for reports in iMIS. The type and size of the font determines how the report will print both on the screen and on the printer. If the fonts are not properly set, the output may cause a reduction in printing speed, loss of quality, or missing components.

View the font table to make sure that it is properly set up and that all of the necessary fonts are installed.

Support for foreign language characters

iMIS runs a customizable stored procedure that replaces foreign characters (ASCII 128 to 256) with standard equivalents (see "Foreign language character replacement map") (ASCII 0 to 127) before it adds a name or address to a search index. Likewise, when you search for a name or address, iMIS runs the same stored procedure on the search text

before it performs the search. The stored procedure works with all Microsoft SQL Server code page settings.

iMIS supports foreign language prefixes such as l' and d'.

- The lower-case word list accepts prefixes that contain an apostrophe.
- A customizable list (the Company Sort Excluded Prefixes list) can exclude prefixes that contain an apostrophe from the Name.COMPANY_SORT field.

  Both lists are available on the System Setup window (in iMIS Desktop, select File > System Setup).

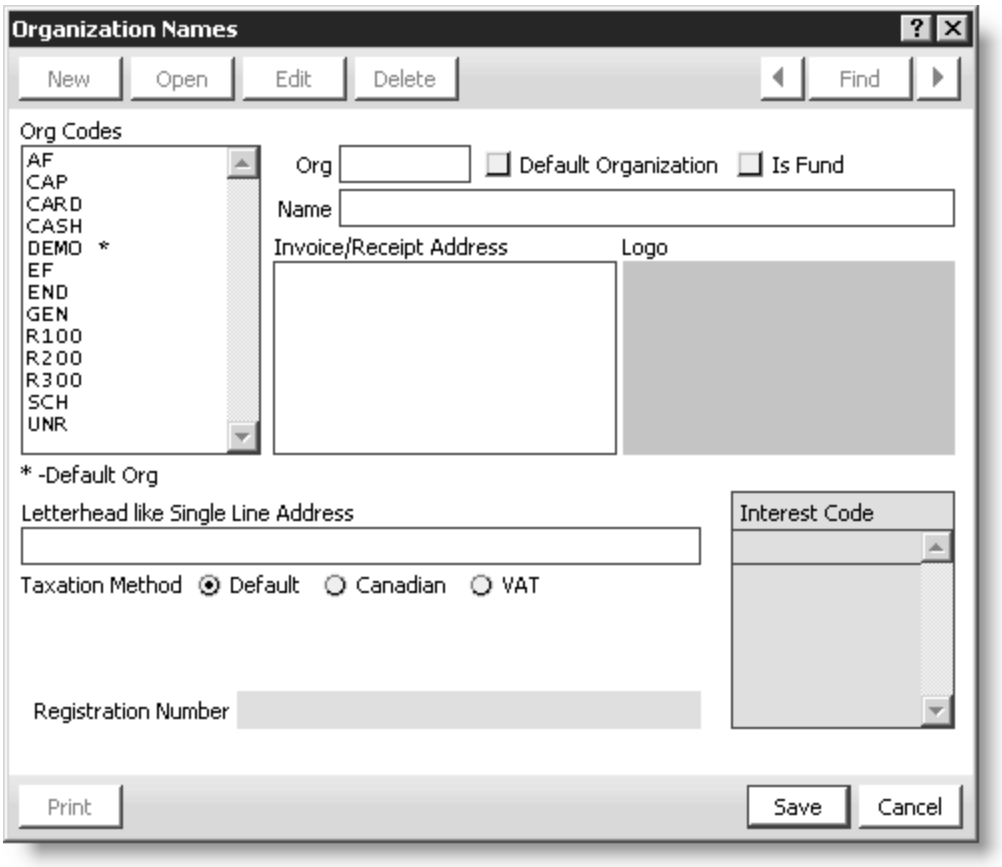
Foreign language character replacement map

This is how iMIS replaces foreign (high ASCII) characters before it adds a name or address to a search index:

Š	S	È	E	ä	a
€	E	É	E	å	a
Œ	C	Ê	E	Æ	a
Ž	Z	Ë	E	ç	c
™	T	Ì	I	è	e
š	s	Í	I	é	e
ž	z	Î	I	ê	e
Ÿ	Y	Ï	I	ë	e
¥	y	Ð	D	ì	i
§	S	Ñ	N	í	i
©	c	Ò	O	î	i
ª	a	Ó	O	ï	i
®	R	Ô	O	ð	o
²	2	Õ	O	ñ	n
³	s	Ö	O	ò	o
µ	u	×	x	ó	o

¹	1	Ø	O	ô	o
¼	4	Ù	U	õ	o
½	2	Ú	U	ö	o
¾	3	Û	U	ø	o
À	A	Ü	U	ù	u
Á	A	Ý	Y	ú	u
Â	A	Þ	P	û	u
Ã	A	ß	s	ü	u
Ä	A	à	a	ý	y
Å	A	á	a	þ	b
Æ	A	â	a	ÿ	Y
Ç	C				

Organization Names window



Select File > System Setup, and click Organization Names

Org Codes

List of codes for the available organizations

Org

(required) Specifies a code for the selected organization

Default Organization

(optional) Select this option to identify the default organization. An asterisk displays to the right of the default organization in the Org Codes list.

Is Fund

(optional) Select this option to indicate that the organization is also a fund

Name

(optional) Specifies the full name of the organization. A maximum of 60 alphanumeric characters can be entered.

Invoice Mail Address

(optional) Specifies the organization's complete address where invoices and other correspondence are to be mailed. Used on reports where the name and address display as a block, such as invoices.

Logo

(optional) Use this field to past the organization's logo into this area of the window.

Letterhead like Single Line Address

(optional) Specifies the organization's letterhead is in a single line address. This information is used on reports where the address appears in single line, such as event confirmations.

Interest Code

(optional) This list contains the fields for entering the interest codes associated with each fund. The interest codes that display are defined on the Set up interest codes window (from Customers, select Set up Fundraising > Interest codes). The Set up Fundraising task list only displays if you are licensed for Fundraising.

Taxation Method

- Default -Enables the default taxation method set up in the AR/Cash module
- Canadian - Enables the Canadian taxation method which includes Goods and Services Tax (GST)/Harmonized Sales Tax (HST) and Provincial Sales Tax (PST) and may be used for other countries that calculate GST
- VAT - Enables taxation method for the European Union

Registration Number

Specifies the registration number associated with the organization or fund. Fundraising organizations must have a registration number (Canada) or tax identification number (United States) in order to claim and verify their tax-exempt status. This field only displays if you are licensed for Fundraising.

Setting Up Organization Names

You can enter your organization's logo to appear on your standard report headings. The company address you enter in the Organization Names window appears on standard invoices, confirmations, and other reports.

If you have multiple financial entities within your organization, you can define multiple entities within iMIS to track their financial records separately.

Note: Although you can have several organizations (entities) defined, you can have only one Default Organization. The default organization is used throughout the product and on printed standard reports.

Defining an organizational entity

Organization, Fund, and Entity, in the context of iMIS accounting, all refer to a business unit that maintains separate financial books. A "fund" is specific type of organization or entity whose purpose is to solicit donations.

To define an entity/organization/fund

1. Select File > System Setup to open the System Setup window.
2. Click Organization Names to open the Organization Names window.
3. Click New.
4. Enter a unique alphanumeric Org Code to represent the organization.

   Note: If you plan to create separate GL interface files for each financial entity, be sure to use as few characters as possible when defining your org codes.
5. Select the Default Organization option if this is the default organization.

   Note: You can set only one entity as the default entity for non-accounting reports and other standard uses. The default organization name and address data is used for all non-

accounting oriented reports. It also becomes the accounting default in cases where no module-level or other override entity is provided.

6. Select the Is Fund option if this organization is also a Fund.

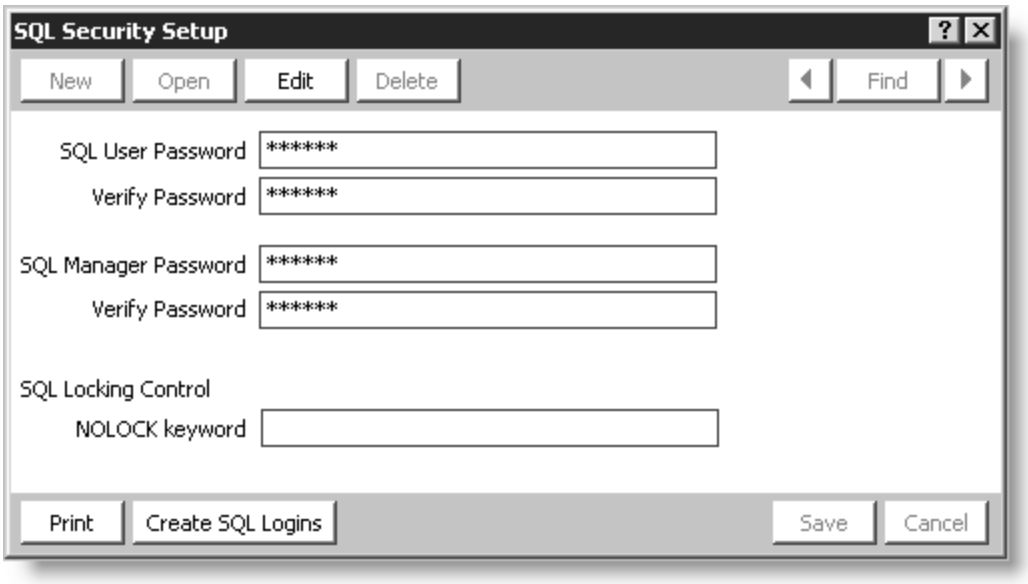
   Note: You must identify the organization as a fund for it to serve as a fund in the Fundraising module.

7. Enter the full Name of the organization.
8. Enter the organization's Invoice/Receipt Address. Include the full mailing address.
9. Paste the company's logo into the Logo field.
10. Enter the Letterhead like Single Line Address.
11. Select the Taxation Method.
12. Select as many Interest Codes as applicable.
13. Enter the organization's Registration Number.
14. Click Save.

SQL Security Setup window

This window allows you to change the passwords of the SQL Server login accounts that perform transactions on behalf of iMIS Desktop users, and to enable iMIS to prevent data modification while reports are running.

Note: See Resetting the system-level SQL authentication passwords (see "Resetting system SQL authentication passwords") in the Maintaining iMIS section of Installation.



File > System Setup, then click SQL Security Setup

This window includes the following fields.

- SQL User Password - (optional) Enter text here to generate a new password for the IMISUSER_[dbName] SQL Server login. Enter the text again in the Verify Password field.

  Note: iMIS uses the password text to generate an SHA-1 hash, so enter a reasonably complex string. For example, a text string of 6-10 characters, including 1 or more digits and 1 or more non-alphanumeric characters, will result in a hash that should prevent dictionary-based attacks.

- SQL Manager Password - (optional) Enter text here to generate a new password for the MANAGER_[dbName] SQL Server login. Enter the text again in the Verify Password field.

- SQL Locking Control - (optional) Enter nolock here to enable iMIS to prevent data modification while a report is running.

  Note: To prevent data modification while a report is running, enter NOLOCK in the report's Parameters field.

- Create SQL Logins - Resets the SQL Server passwords for the IMISUSER_[dbName] and MANAGER_[dbName] logins. iMIS prompts you to enter the password for the SQL

Server sa login.

- Save - For the SQL password fields, this button generates password hashes and then stores them in the System_Params table. For the NOLOCK keyword field, this button saves the keyword in the System_Params table.

Specifying a folder for Letter System templates

To enable the Letter System, you must specify a folder its template files. All iMIS users must specify the same folder path, whether it's local or remote. The path you specify is stored in the iMIS System_Params table, as the ParameterName value of System_Control.MSWordStoreDirectory.

Note: Truncating the Report Specs table deletes the Microsoft Word template report specifications.

To specify a folder for Letter System template files

1. Log on to iMIS.
2. Select File > System Setup.

   The System Setup window opens.
3. Click Edit.
4. Click Choose MS Word Folder (or enter a folder path in the field next to that button).

   The Browse for Folder dialog box appears.

- Select a local or remote folder.

  If you specify a remote folder, make sure that all users have permissions to access to the folder.

- Click OK.

5. In the System Setup window, click Save.
6. Log out of iMIS, and then log on again.

Activity record file attachments

When you open an activity record and click the Attachment button on the Activity Detail window, you can attach a file to the activity record and save it to the iMIS database. For example, you can attach a Microsoft Word document, PowerPoint slide presentation, spreadsheet, graphic, email file, or HTML page.

Once the file is saved to the iMIS database, you can open it on your system using the associated application and view, modify, or delete it from within iMIS.

Enabling attachments on activity records

To enable the activity attachment feature, you must do the following:

- Enable the Activity Attachments allowed option on the System Setup window (select File > System Setup).
- Enter a value in the Maximum file size (KB) field on the System Setup window (displays when you enable the Activity Attachments allowed option). See Specifying maximum size of activity attachments for more information.
- Enable the Allow user Edit option on the Set up activity types window (from Customers, select Set up module > Activity types) for the activity for which you want to add an attachment.

  Note: Some activity types are system-generated (for example, Order) and are not intended for editing. However, if you want to attach a file to one of these activity types, you must enable the Allow user Edit option.

  To enable the Activity attachments

1. Select File > System Setup to open the System Setup window.
2. Click Edit.
3. Enable the Activity Attachments allowed option.
4. Enter a value in the Maximum file size (KB) field. (Displays when you enable the Activity Attachments allowed option.)

5. A message warns you that the maximum you specified may have adverse effects on performance. Click OK.
6. Click Save.

Specifying maximum size of activity attachments

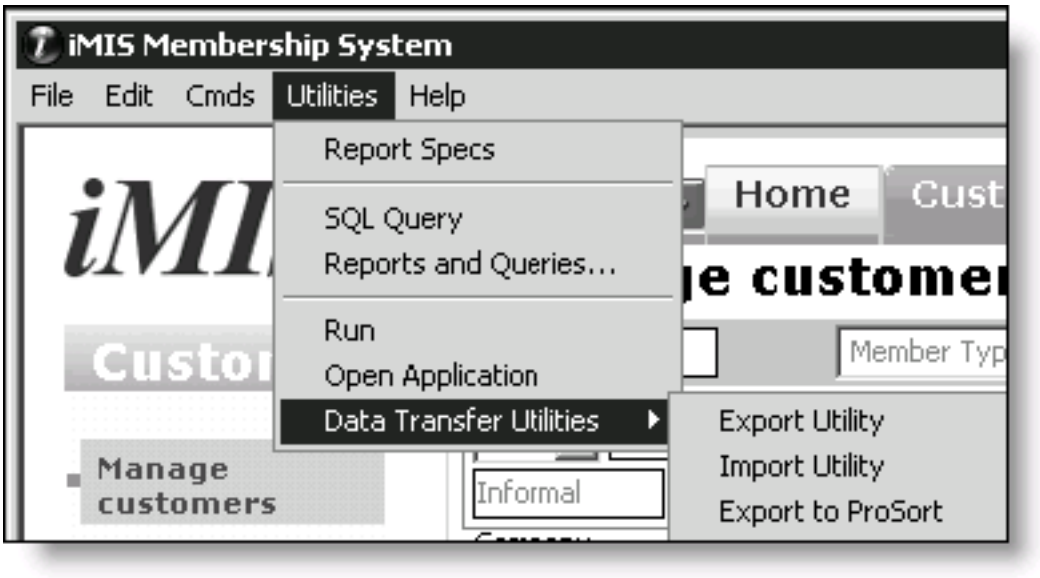
Although you can specify the maximum file size of activity attachments that can be stored in the database, the absolute maximum size is determined by many factors (for example, the maximum size of your database server). In most cases, specifying a small activity attachment size limit (for example, 500 for a 500 KB file) should be large enough. The maximum file size for a Word document, for example, is 32 MB.

Caution! Do not increase this value until you have verified through testing that performance of your system remains acceptable at the new value. Storing a large number of attachments will increase the size of your database very rapidly, affecting backup requirements and the available disk space on your database server.

Utilities (Utilities menu)

The commands on the Utilities menu help you maintain and monitor reports, tables, and data that are used throughout iMIS.

Note: As functionality moves to .NET, many of these utilities are being replaced by and incorporated into DB Maintenance and DB Upgrader, which are available from your iMIS program group.



The Utilities menu is only available from the administrative views.

Report Specs

Opens the Report Specifications window, where you can copy and modify standard reports.

SQL Query

Opens the SQLQuery window, where you can enter and execute SQL commands.

Reports and Queries…

Opens the System Reports and Queries window, where you have access to SQL scripts that can be run to manipulate your iMIS data.

Run

For developers: Executes an iMIS procedure.

Open Application

For developers: Opens a different Omnis library.

Data Transfer Utility

Opens a sub-menu of the following items, which appear only if licensed:

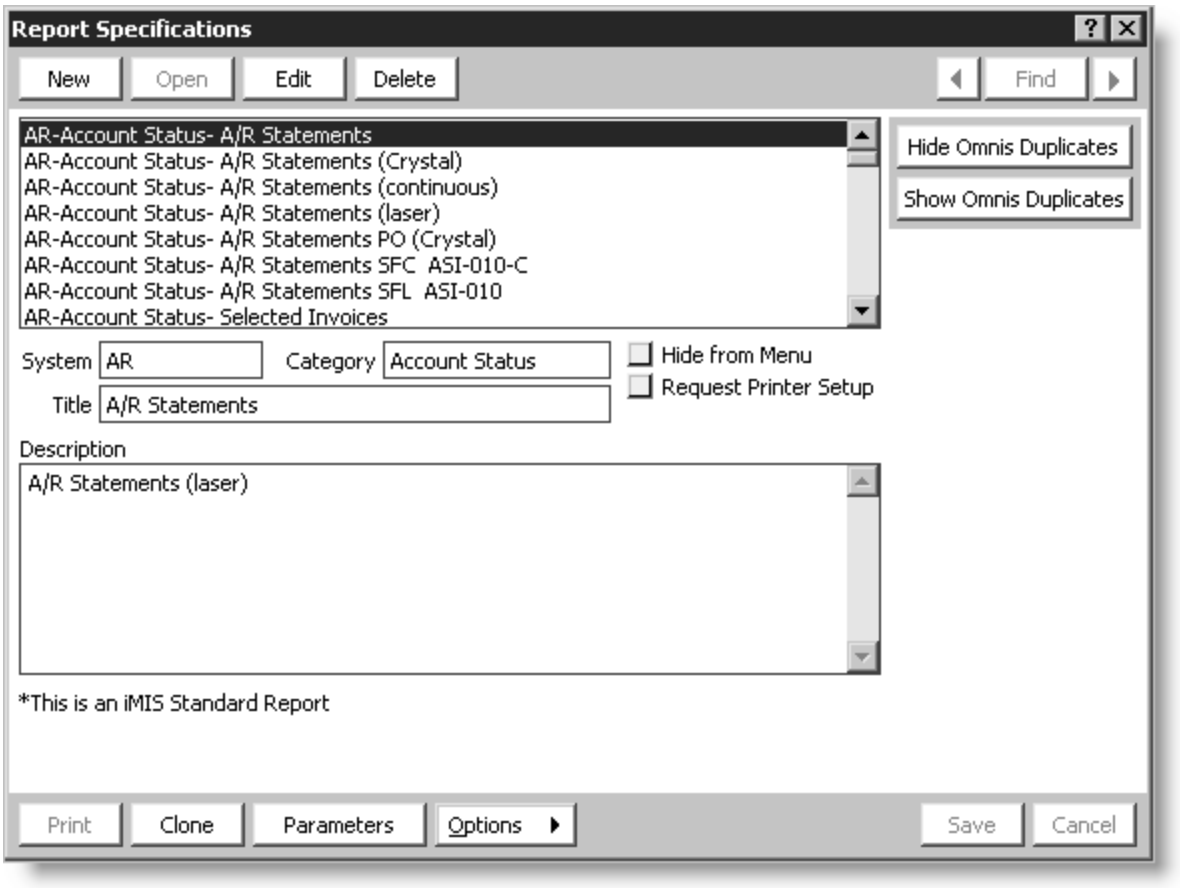
- Export Utility – opens the Export Utility window
- Import Utility – opens the Import Utility window
- Export to ProSort – opens the ProSort Exports window

Report Specifications

Each iMIS module contains a Reports menu item through which module-specific reports can be run. The specifications or details of all the iMIS standard reports can be modified or cloned (copied and renamed) through the Report Specifications window (select Utilities > Report Specs) and the Detail Report Parameters window (select Utilities > Report Specs and click Parameters). This is a powerful tool when used in conjunction with the Ad Hoc Search feature to create customized end-user reports with a minimum of time, energy, and expertise.

Note: To run a Crystal or Access report in iMIS, the report must be added to the list of reports in the Report Specifications window.

Report Specifications window



From the menu bar, select Utilities > Report Specs

Report scrolling area

List of all iMIS reports.

System

Indicates the iMIS system or module where the report resides. For example, if a report is listed in the AR system, you would access the AR system report by selecting AR/Cash, and selecting Generate reports.

Category

Refers to the report type. For example, if you access the AR/Cash Generate reports window (from AR/Cash, select Generate reports), there would be three report type categories: Account Status, Deferred Income, and Transaction Lists. Each category contains reports that are specific to the category.

Title

Indicates the report name that will display on the report and in the Available Reports area of the report window. For example, you would access the A/R Statements report by selecting AR/Cash, and selecting Generate reports, and selecting the Account Status report type.

Hide from Menu

If enabled, hides the report from displaying on the report window.

Request for Printer Setup

If enabled, the system automatically displays the Set Report Destination window so you can select the appropriate print destination.

Description

This is a detailed description of the report.

Options button

Drop-down menu items of current report format options that can be modified for the selected report. Options range from adjusting the margins, modifying the search criteria, changing the sorting option, exporting report records to another application, adding additional fields that are mapped to the specific parameters, and adding text to letter formats. Report options vary by report type.

Clone button

Used to create an exact copy of the selected report. Modify the title and some of the report properties to create a new report on the report menu.

Parameter button

Opens the Detail Report Parameters window. This window contains a detailed list of the report parameters.

Cloning reports

To avoid losing report specifications, it is best to clone a report and make the changes to the cloned version.

To clone a report

1. From the menu bar, select Utilities > Report Specs to display the Report Specifications window that contains a list of all standard reports, sorted by module and type.
2. Select the report you want to clone and then click Clone.
3. Enter in the System and Category where you want the report to appear.
4. Enter a name for the cloned report in the Title field and a new description in the Description field.

   Note: If you use the cloned report as the standard report within its Category and the original report chosen for printing at the individual level, make sure the report name is first in the alphabetical report category. To simplify this task further, put a period "." at the beginning of the name, such as .Badge, so it becomes the default for the report type. Not all options are available for all reports.
5. Click Parameters and make changes, if necessary.
   This may include a change in the Report Format used to print the report, an addition or change of an option in the Options list string, or an addition of message text (for certain invoice and confirmation formats) in the Parameters text field.

   Note: When changing an option, remember that most of the options available for a report are already in the Options list. However, you may need to either enable or disable the option depending upon the setting. To enable an option that is disabled, change the first word of the option from NO to PRINT For example, NO_FULL_ADDRESS to PRINT_FULL_ADDRESS.
6. Click OK. You have created a new report that appears with the other Standard Reports.

Common report tables and joins

These are the most common table and field layouts and joins that are used in iMIS reports:

Activity Reports

Tables	• Name • Name_Address • Activity • Name_Fin • Org_Control • Product • Subscriptions
Join Examples	• Name.ID=Activity.ID • Name.ID=Name_Fin.ID • Name.ORG_CODE=Org_Control.ORG_CODE • Activity.PRODUCT_CODE=Product.PRODUCT_CODE • Name.ID=Subscriptions.ID • Activity.PRODUCT_CODE=Subscriptions.PRODUCT_CODE See Common Address Joins

AR/Cash Reports

Tables	• Name • Invoice • Trans
Join Examples	• Name.ID=Invoice.BT_ID • Trans.BT_ID=Invoice.BT_ID • Trans.BATCH_NUM=Invoice.BATCH_NUM

Committee Reports

Tables	• Name • Activity • Committee_Minutes • Committee_Position • Gen_Tables
Join Examples	• Name.ID=Activity.ID • Activity.PRODUCT_CODE=Committee_Minutes.PRODUCT_CODE • Name.TITLE=Committee_Position.TITLE • Activity.DESCRIPTION=Gen_Tables.DESCRIPTION

Dues Reports-Invoices (Cash Method)

Tables	• Name • Name_Address • Subscriptions
Join Examples	• Name.ID=Subscriptions.ID • Name.BILL_ADDRESS_NUM=Name_Address.ADDRESS_NUM

Dues Reports-Invoices (Accrual Method)

Tables	• Name • Name_Address • Invoice • Invoice_Lines • Trans • Subscriptions
Join Examples	• Name.ID=Trans.BT_ID

- Name.BILL_ADDRESS_NUM=Name_Address.ADDRESS_NUM
- Invoice.REFERENCE_NUM=Trans.INVOICE_REF_NUM

Meeting Reports

Consist of Rosters, Badges, Confirmation Letters, and Invoices

Tables
- Orders
- Order_Badge
- Order_Lines
- Order_Meet
- Order_Payments
- Meet_Master

Join Examples
- Orders.ORDER_NUMBER=Order_Lines.ORDER_NUMBER
- Orders.ORDER_NUMBER=Order_Badge.ORDER_NUMBER
- Orders.ORDER_NUMBER=Order_Payments.ORDER_NUMBER
- Orders.ORDER_NUMBER=Order_Meet.ORDER_NUMBER
- Order_Meet.MEETING=Meet_Master.MEETING

Membership Reports

Tables
- Name
- Name_Address
- Name_Note
- Name_Fin
- Any User-Defined Custom Table

Join Examples
- Name.ID=Name_Note.ID
- Name.ID=Name_Fin.ID

- Name.BT_ID=Name_Fin.BT_ID

  See Common Address Joins

Orders Reports

Tables	• Orders • Order_Lines • Order_Payments
Join Examples	• Orders.ORDER_NUMBER=Order_Payments.ORDER_NUMBER • Orders.ORDER_NUMBER=Order_Lines.ORDER_NUMBER • Orders.PAY_TYPE=Order_Payments.PAY_TYPE • Orders.PAY_NUMBER=Order_Payments.PAY_NUMBER • Orders.CREDIT_CARD_EXPIRES= Order_Payments.CREDIT_CARD_EXPIRES • Orders.AUTHORIZE=Order_Payments.AUTHORIZE • Orders.CREDIT_CARD_NAME= Order_Payments.CREDIT_CARD_NAME • Orders.CASH_GL_ACCT=Order_Payments.CASH_GL_ACCT

Common address joins

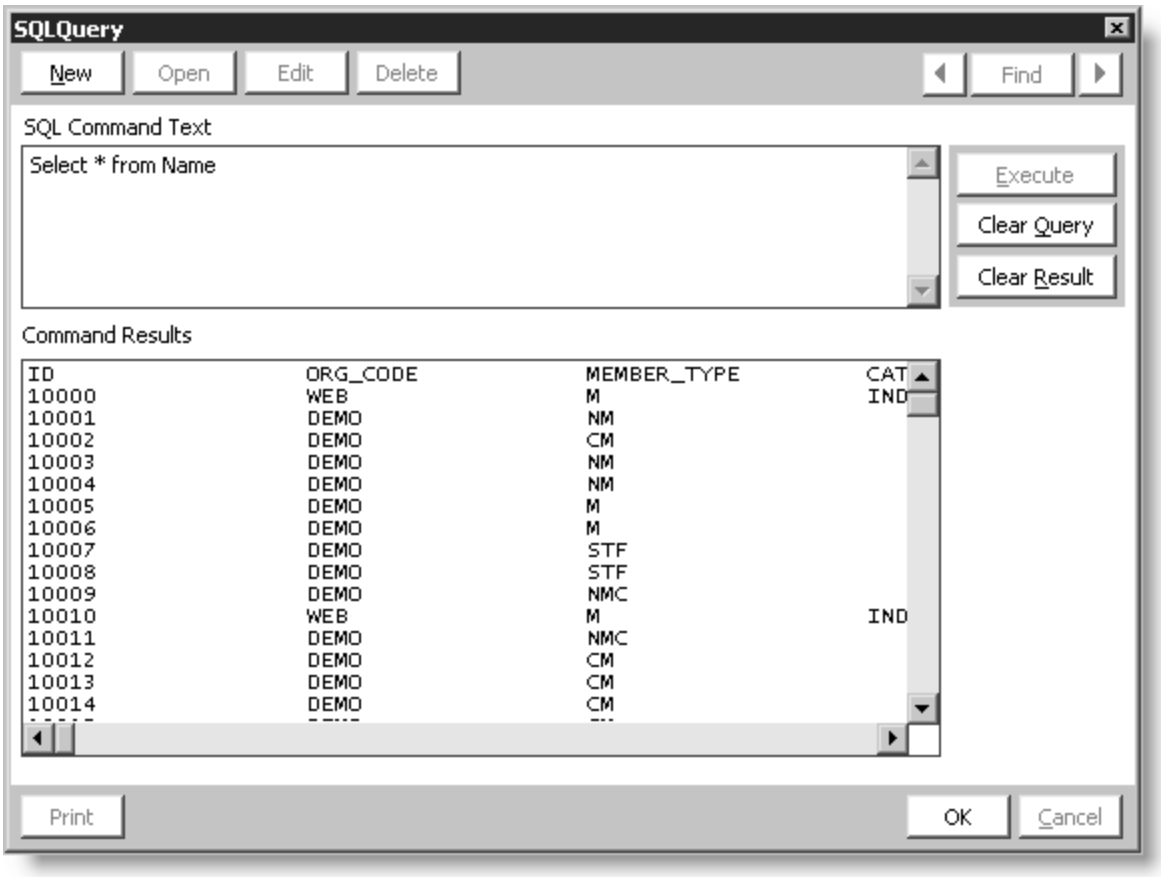
Reports using Address 1	Name.ADDRESS_NUM_1= Name_Address.ADDRESS_NUM
Reports using Address 2	Name.ADDRESS_NUM_2= Name_Address.ADDRESS_NUM
Reports using Address 3	Name.ADDRESS_NUM_3= Name_Address.ADDRESS_NUM
Reports using Preferred Bill Address	Name.BILL_ADDRESS_NUM= Name_Address.ADDRESS_NUM
Reports using Preferred Mail	Name.MAIL_ADDRESS_NUM= Name_

Address	Address.ADDRESS_NUM
Other Alternate Addresses	For example, if you have more than three purposes: Name.ID=Name_Address.ID where PURPOSE=' ' (List purpose in between single quotes.)

SQL Query

In iMIS you can run SQL queries to view the data in the tables.

1. From the menu bar, select Utilities > SQL Query to open the SQL Query window.
2. Click New.
3. Enter the SQL query in the SQL Command Text box. In the following example, we are selecting all the data from the Name table.
4. Click Execute. iMIS displays the results of the query in the Command Result box.
5. To clear the screen:
6. Click Clear Query to clear the SQL command.
7. Clear Clear Result to clear the results.

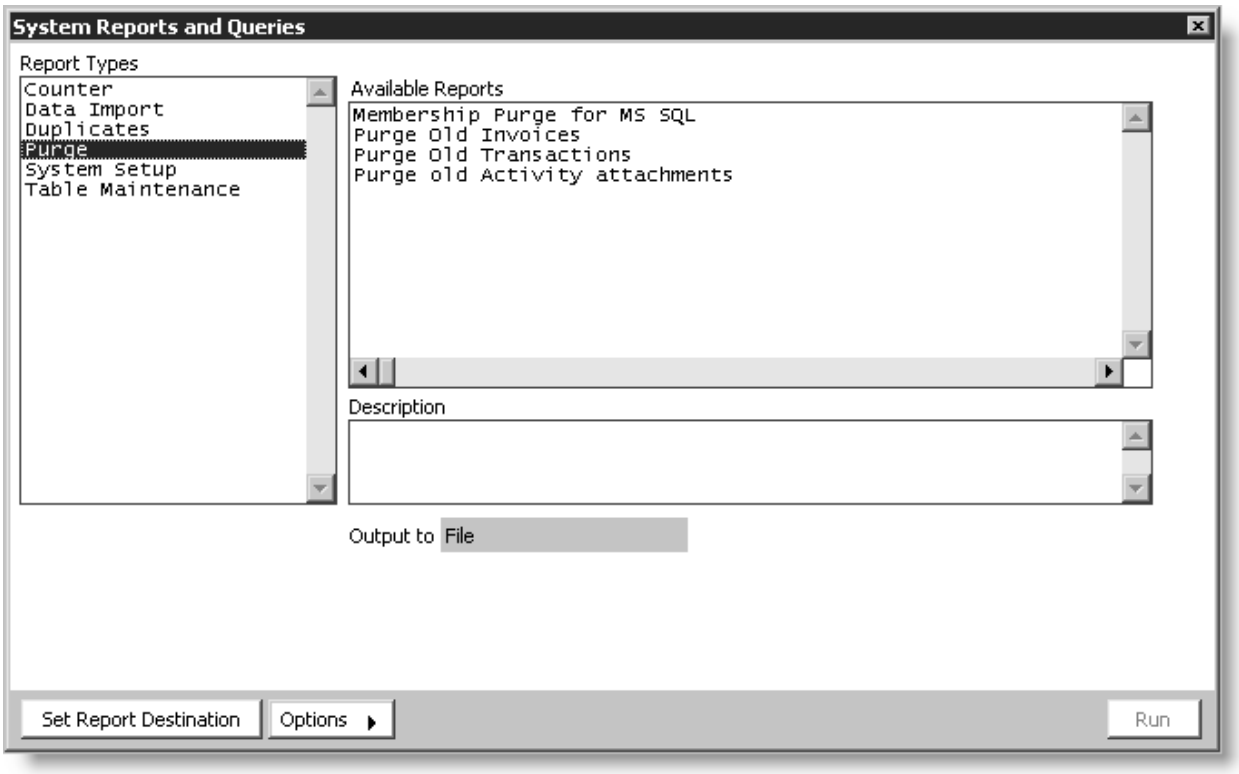


From the menu bar, select Utilities > SQL Query

Reports and Queries

iMIS provides several SQL scripts that can can add or change data in the tables. The SQL scripts are stored as standard iMIS reports that you can clone and customize.

System Reports and Queries window



From the menu bar, select Utilities > Reports and Queries

Note: Run the System Setup routines only after the prerequisite conditions are met.

The following Data Import, Purge, System Setup, and Table Maintenance report types display with a brief description.

Data Import

Import Data into the Prospect Table: Imports prospect records from a tab-delimited file into iMIS.

Purge

Membership Purge for MS SQL: Deletes customer records with a status of “D.”

Purge Old Invoices: Deletes records in the Invoice and Invoice_Lines tables which have a zero balance, are dated before the retention months and in which there are no linked and unposted transactions remaining.

Purge Old Transactions: Deletes records in the Trans table where TRANSACTION_ DATE is less than Trans retention months and are no longer associated with its corresponding invoice record.

Purge Old Activity attachments: Deletes activity attachments with a timestamp before a specified date.

System Setup

Co. to Member Addr. Flowdown: Populates a member's first Name_Address record (the required one where PURPOSE = Membership Address1 Prompt) from the corresponding Name_Address record of the company ID (CO_ID). Only member records where ADDRESS_1 is blank are updated.

Prerequisite: This procedure requires that Name_Address.ADDRESS_NUM be populated and Name_Address.PURPOSE be populated to match the address prompts in Customers > Set up module > General > Address and Notes button.

Note: This script updates only the Name_Address record; it does not update user-defined fields within Advanced Flow Down.

Rebuild Chapter Subscriptions: (for optional Chapter Management) Inserts Chapter Subscription records based on Name.CHAPTER.

Prerequisite: Requires that Name.CHAPTER be populated.

Rebuild Member_Type Info: Populates Name.MEMBER_RECORD, COMPANY_ RECORD, and CO_MEMBER_TYPE.

Prerequisite: Requires that you first complete Member_Type setup and create the Company_Index view.

Rebuild Name Fields: Rebuilds the index fields Name.LAST_FIRST, COMPANY_SORT, and FULL_NAME. To speed processing, select Drop Indexes first.

Prerequisites: (1) Requires that you first upload the Name table, (2) populate elements of member name (at least LAST and FIRST), and (3) populate Name.COMPANY.

Rebuild Name.DUP_MATCH_KEY: Rebuilds the Name.DUP_MATCH_KEY according to the following iMIS default formula. This formula checks for duplicates: the first five digits of the ZIP (postal code) field, the first four characters of the last name, and the first initial.

con (mid(Name.ZIP,1,5),mid(Name.LAST,1,4),

mid(Name.FIRST,1,1))

The standard formula is used unless a custom formula has been entered in the Duplicate Record Check Formula field on the Customer Setup – Advanced window (from Customers, select Set up module > General, and click Advanced). If the Duplicate Record Check Formula field is blank, the default formula will be used.

Prerequisite: Requires that you first run Rebuild Name_Address Pointers (to populate ZIP in Name) and populate any other fields used in the dupmatch formula.

Caution! If you customize your dupmatch formula, you must populate the parameters of the report specification (select Utilities > Report Specs).

Rebuild Name_Address Pointers: Populates Name_Address.FULL_ADDRESS and Name's address fields, including MAIL_ADDRESS_NUM, BILL_ADDRESS_NUM, ADDRESS_NUM_1, ADDRESS_NUM_2, ADDRESS_NUM_3, and FULL_ADDRESS.

Prerequisite: Requires that you first populate the Name table with unique ID's, populate the Name_Address table with unique ID's that correspond to the Name table and populate the Name_Address.ADDRESS_NUM field with unique sequential numbers. From Customers, select Set up module > General and click Address and Notes, populate the Address Usage fields (Name_Address.PURPOSE) to match your setup, and make sure that you have at least one Name_Address record for each member, with a PURPOSE matching the first address prompt.

Post Processing: (1) Select Utilities > Table Analysis (2) Select Name table record, and (3) Click Make Indexes.

Rebuild Name_Indexes: Name_Indexes can be used to define auxiliary indexes on the Name table that will appear in the Name Find window's list of find criteria. These additional indexes are set up on the Customer Setup – Indexes window (from Customers,

select Set up module > General, and click Indexes). This example script shows how to populate the Name_Indexes table when Name.STATE_PROVINCE is set up as additional index 1.

Prerequisites: (1) A column or Omnis expression using columns from the Name table must be defined as an additional index on the Customer Setup – Indexes window. In this example, Name.STATE_PROVINCE is defined as additional index 1. (2) To modify this script, clone it and substitute a SQL expression equivalent to the Omnis expression used in System Setup and the corresponding index number (1, 2, 3, or 4) where this script has Name.STATE_PROVINCE and 1, respectively. (3) This script truncates and rebuilds the whole Name_Indexes table, so if you have several additional indexes you should put all the updates in one script.

Remove Name.LAST_FIRST apostrophes: Removes apostrophes from the Name.LAST_FIRST field. It will run faster if it is done before Name indexes are added.

Prerequisites: (1) Name table is uploaded (2) Elements of member name are populated: at least LAST and FIRST (3) Rebuild Name script has been run to populate LAST_ FIRST.

Table Maintenance

Remove Ref_Provided NULLs: Replaces NULLs in the Ref_Provider table with either a blank (‘ ‘) or a zero (0) depending on the datatype of the field being updated.

Set Activity type donor club: Updates Activity.ACTIVITY_TYPE = ‘DONORCLUB’.

Set Activity.ORIGINATING_TRANS_NUM: Updatse Activity.ORIGINATING_TRANS_ NUM with its matching Trans.TRANS_NUMBER.

Set Product type donor club: Updates Product.PROD_TYPE = ‘DONORCLUB’.

Set Product FR type donor club: Updates Product_FR.FR_TYPE = ‘DONORCLUB’.

Set Product_Type type donor club: Updates Product_Type.PROD_TYPE = ‘DONORCLUB’.

Customizing system reports

The System Reports can be customized to fit your company’s needs.

To clone and customize a system report

1. From the menu bar, select Utilities > Report Specs to open the Report Specifications window that contains a list of all standard reports, sorted by module and category.
2. Scroll down to the SYSTEM module. The categories under SYSTEM are Data Import, Purge, System Setup and Table Maintenance.
3. Select the report you want to clone and then click Clone.

   Note: Do not change the System and Category fields if you want the cloned report to display with the other reports.
4. Type a name for the cloned report in the Title field and a new description in the Description field.

   Note: If you use the cloned report as the standard report within its Category, make sure the report name is first in the alphabetical report category. To simplify this task further, put a period "." at the beginning of the name, such as .Badge, so it becomes the default for that report type. Not all options are available for all reports.
5. Click Parameters to open the Detail Report Parameters window.
6. If you are entering an SQL command in the Parameters field, make sure that SQLExec/240 is shown in the Control Procedure field.
7. Make the necessary changes to the report. This may include a change in the Report Format used to print the report, an addition or change of an option in the Options list string, or an addition of message text (for certain invoice and confirmation formats) in the Parameters text field.

   Note: When changing an option, remember that most of the options available for a report are already in the Options list. However, you may need to either enable or disable the option depending upon the setting. To enable an option that is disabled, change the first word of the option from NO to PRINT, for example, NO_FULL_ADDRESS to PRINT_FULL_ADDRESS.
8. Click OK. You have created a new report that appears with the other Standard Reports.

Adding SQL queries to custom reports

You can add a new System Report with an SQL query.

To add an SQL query to a custom report

1. From the menu bar, select Utilities > Report Specs to open the Report Specifications window.
2. Click New.
3. Enter the System, Category, and Title.
4. Click Parameters to open the Detail Report Parameters window.
5. Enter SQLExec/240 in the Control Procedure field.
6. Add GO after your SQL statement.
7. Click OK.

Run iMIS Procedure Utility

Occasionally, ASI will develop procedures to fix iMIS data. The Run procedure utility is used to run an ASI procedure that the technical support department has determined is required.

To run an iMIS procedure

1. From the menu bar, select Utilities > Run.

   The Run Procedure window opens.
2. Enter the procedure name and click OK.

Open Application Utility

The Open application utility allows you to open an Omnis-based library in iMIS.

To open a different library

1. From the menu bar, select Utilities > Open Application.

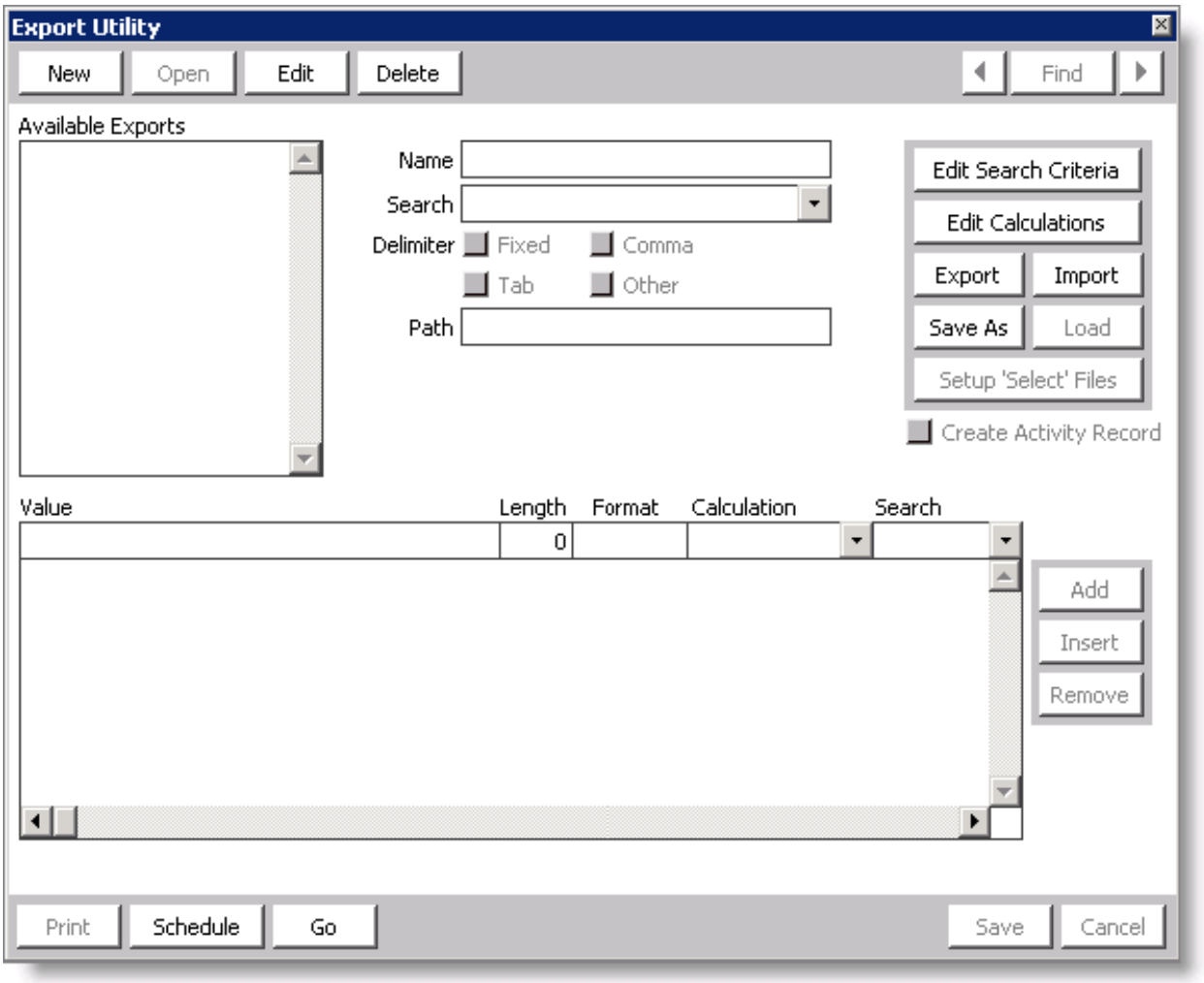
   The Select library window opens.

2. Select the library you wish to use and click Open.

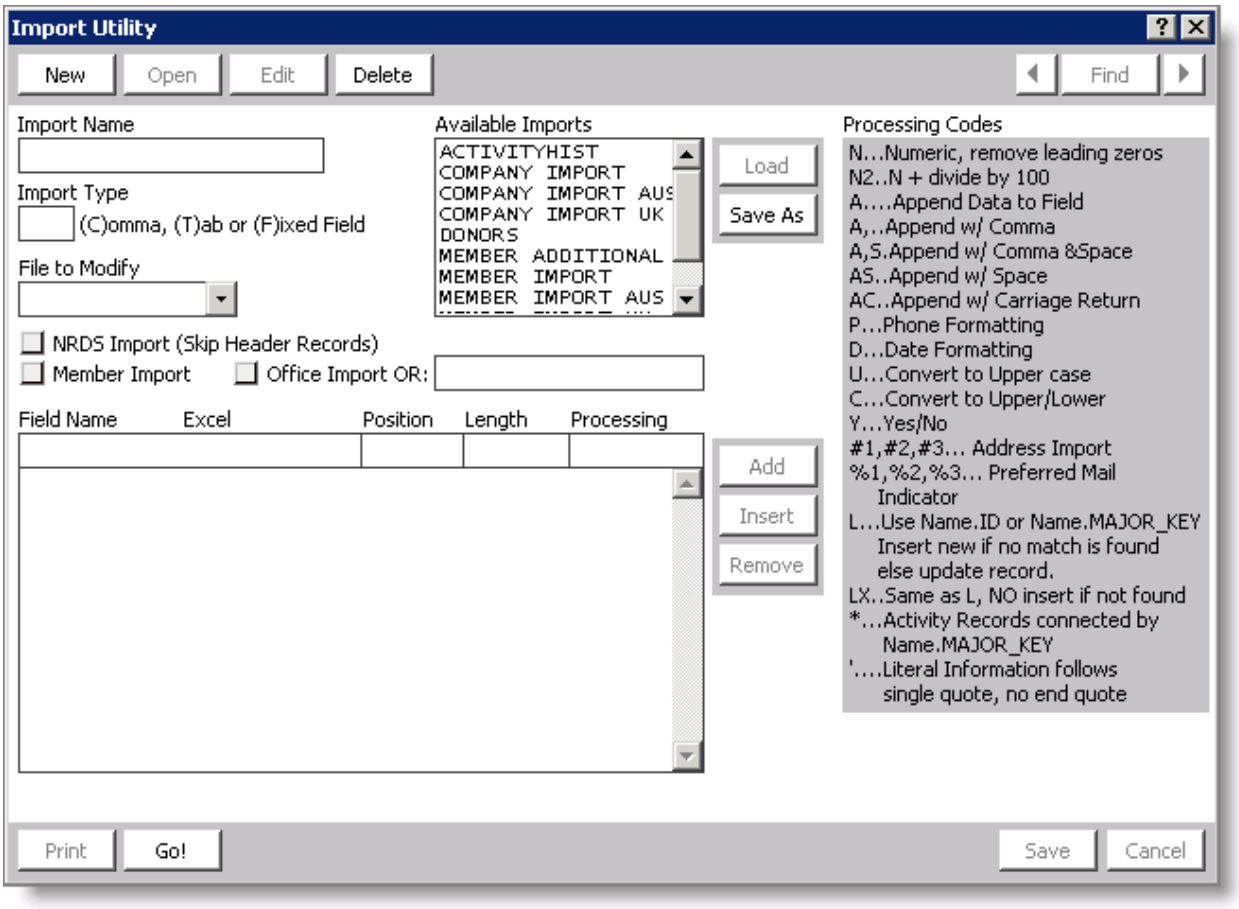
Data Transfer Utilities

Note: If you don't see these utilities, you may not be licensed for them.

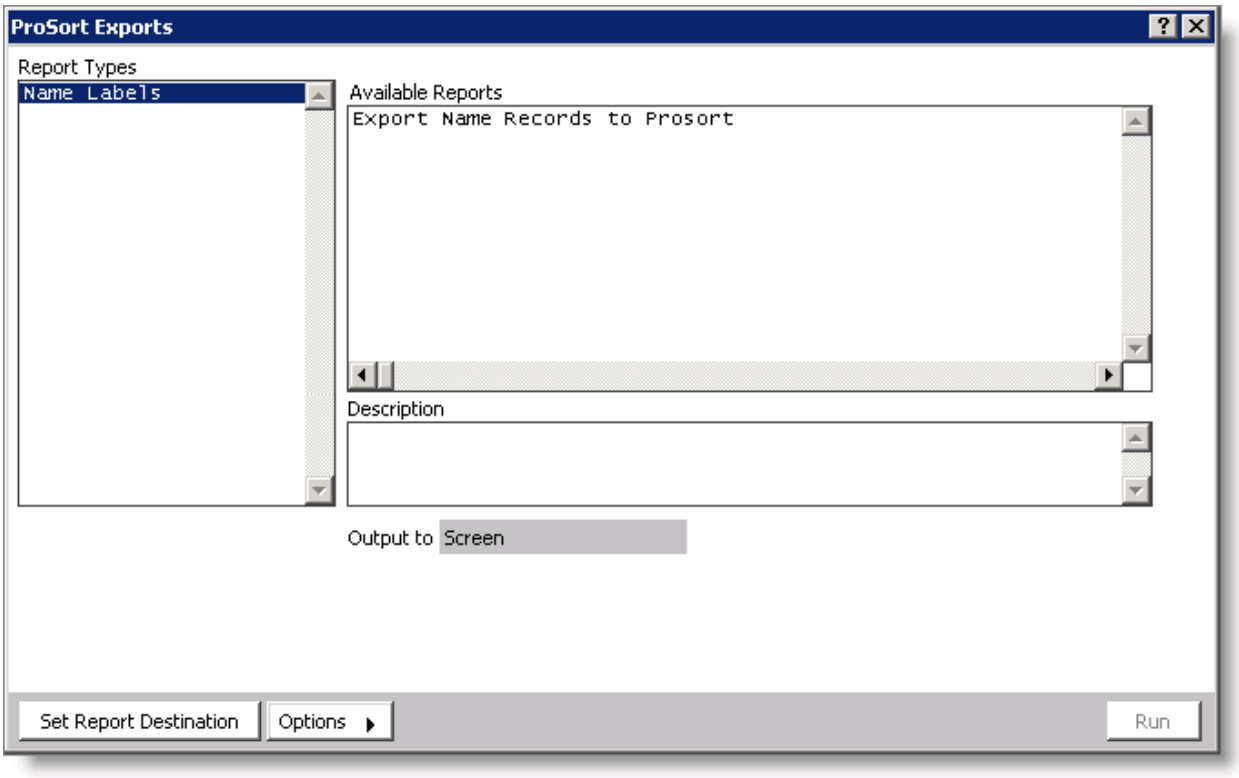
Export Utility opens the Export Utility window, where you can export data from iMIS to another location or third party applications such as word processor, spreadsheet program, or compatible database application. (Required license: Export Utility)



Import Utility opens the Import Utility window, where you can import data into the iMIS database. (Required license: Import Utility)



Export to ProSort opens the ProSort Exports window, where you can use the name and addresses that have been verified through Accumail to prepare mailing labels. (Required license: ProSort)



Export Utility

The Export Utility is a powerful tool for exporting information from the iMIS system to another location or to a third-party software application such as a word processor, spreadsheet program, or compatible database application. The Export Utility gives you the capability to:

- Include information from multiple records of the same file on one export record
- Update fields in the iMIS database when the export is run
- Specify if/then processing of the output
- Create an activity record that records the date the export record was created and includes a copy of each member's export record
- Schedule the export execution time

To use the iMIS Export Utility, you must have the EXPORT license code in your system control file. Contact your authorized iMIS reseller to obtain an updated system control file.

Using the iMIS Export Utility

To export data using the iMIS Export Utility:

1. Create the export definition
2. Select the iMIS tables and fields to be exported
3. Specify the search criteria to be used
4. Specify the export field formats
5. Run the export

Creating an Export Definition

The first step to export data with the Export Utility is to create the basic export definition. The export definition specifies and formats the data to be exported.

To create the export definition

1. Select Utilities > Data Transfer Utilities > Export Utility.
2. Click Insert.
3. Type a name for the export definition in the Name field.
4. Select a Delimiter (character to be placed between fields):

- Fixed – no delimiter
- Tab
- Comma
- Other – specifies other delimiter in field that appears
- Quotes – encloses text in double quotes. This is helpful if a comma delimiter is required and some text fields contain commas.

Note: This field displays only when a delimiter other than Fixed is selected.

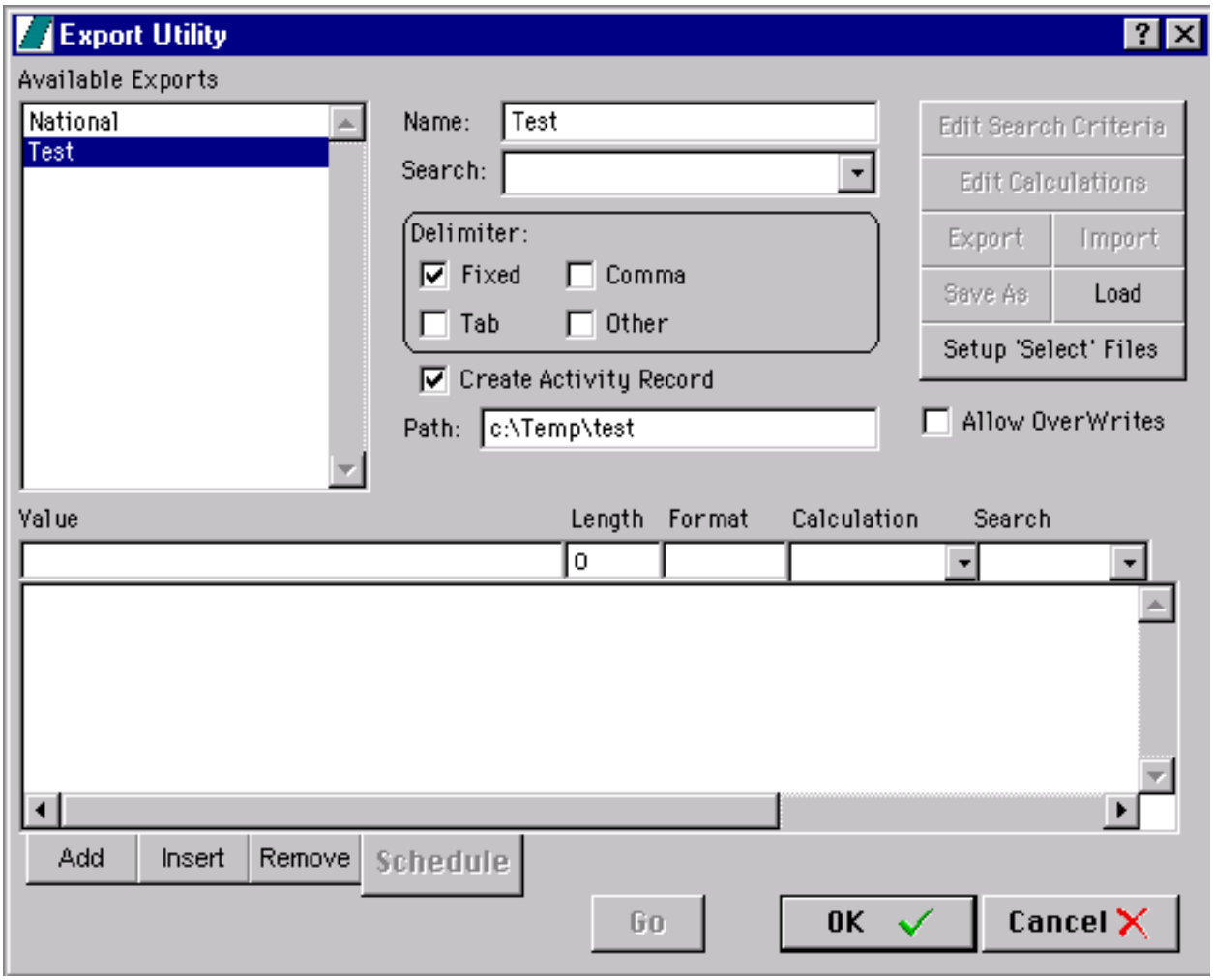
5. (Optional) Enable the Create Activity Record option to record each export record as a member activity in the iMIS database.

6. Define the Path for the export file.

   Tip: You can include an incremental sequence number in the name of the file by including a question mark in the name of the file. For example, if you enter c:\Temp\national?.txt, the file c:\Temp\national1.txt is created the first time you run the export, c:\Temp\national2.txt is created the second time, and so forth.

7. (Optional) Select the Allow OverWrites option to allow the file to be overwritten each time the export is run.

8. Click OK to save.

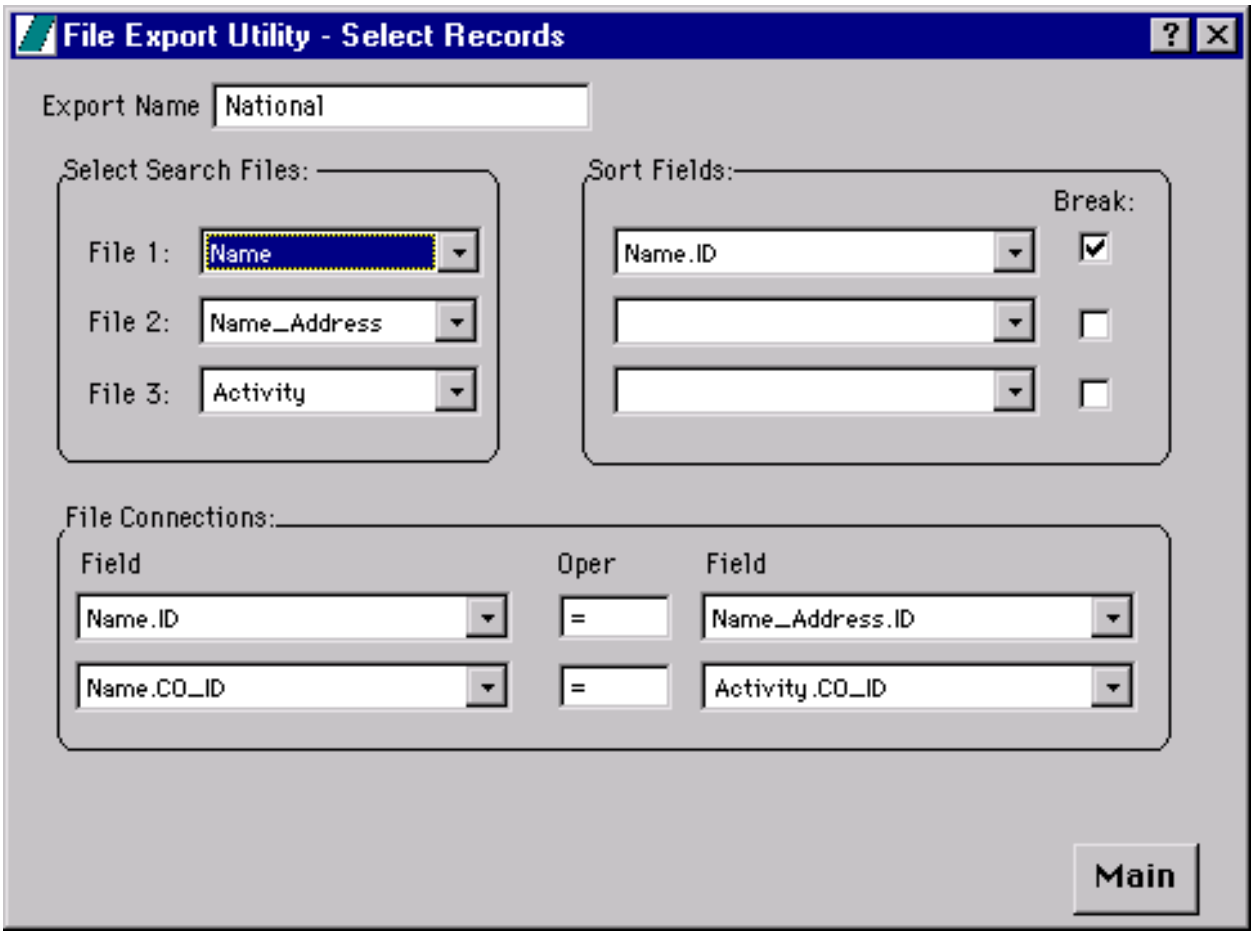


Selecting iMIS Tables and Fields to be Exported

After you create the export definition, select the iMIS tables and fields to be included in the export definition. These Select Files are the basis for the export. You can sort the export records based on a file/field value in the Select Files and you can define search criteria to designate data in the Select Files to be exported.

To select the iMIS tables and fields to be exported

1. Select Utilities > Data Transport Utilities > Export Utility.
2. Select an Available Export.
3. Click Edit. Click Setup 'Select' Files to open the File Export Utility - Select Records window.



4. Select up to three iMIS tables as Select Files.
5. (Optional) Select the Sort Fields for these files. This determines the order the records are exported.
6. (Optional) Select the Break option if you want to create an export record each time the value in the Sort Field changes.

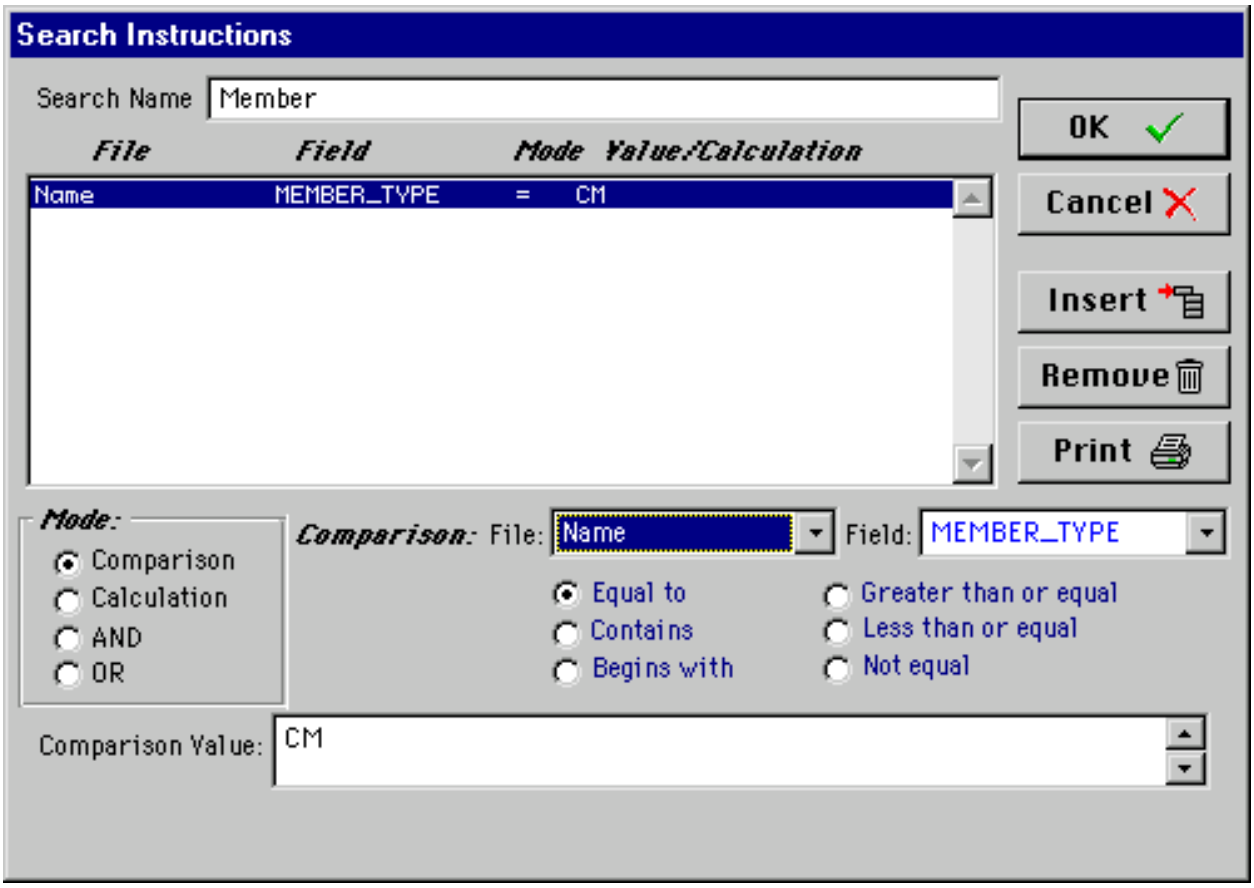
   Tip: To eliminate duplicate member export records, specify the Name.ID field as a Break field. The Export Utility will create only one export record for each unique Name.ID.
7. Define the joins for the Select Files (tables) in the File Connections fields.
8. Click Main to return to the Export Utility window.
9. Click OK to save.

   Specifying Search Criteria

   The next step is to specify the general search criteria for the export. The export will contain only the information in the Select Files that meets the search criteria.

   To specify search criteria

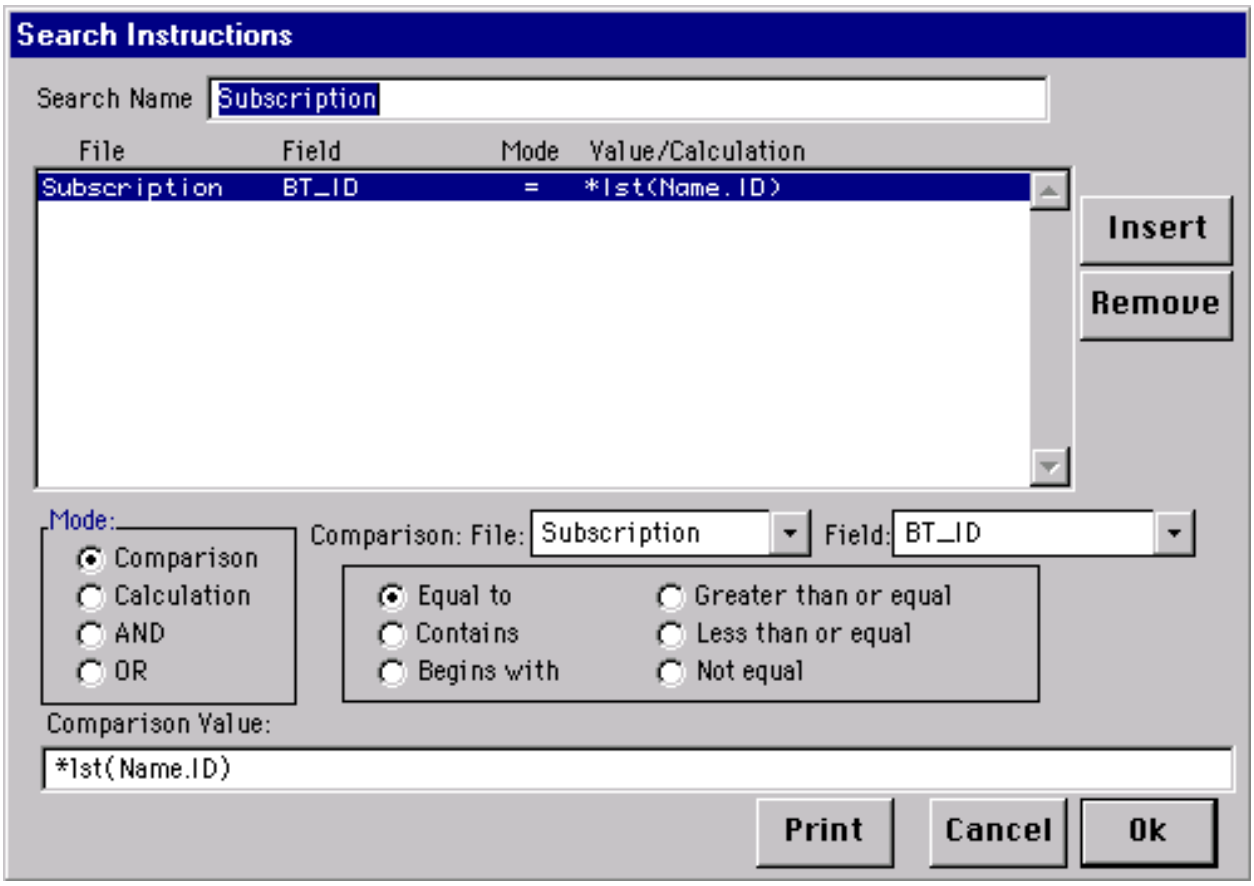
1. Select Utilities > Data Transport Utilities > Export Utility.
2. Click Edit Search Criteria to open the Select Search Instructions window.
3. Click New to open the Search Instructions window.



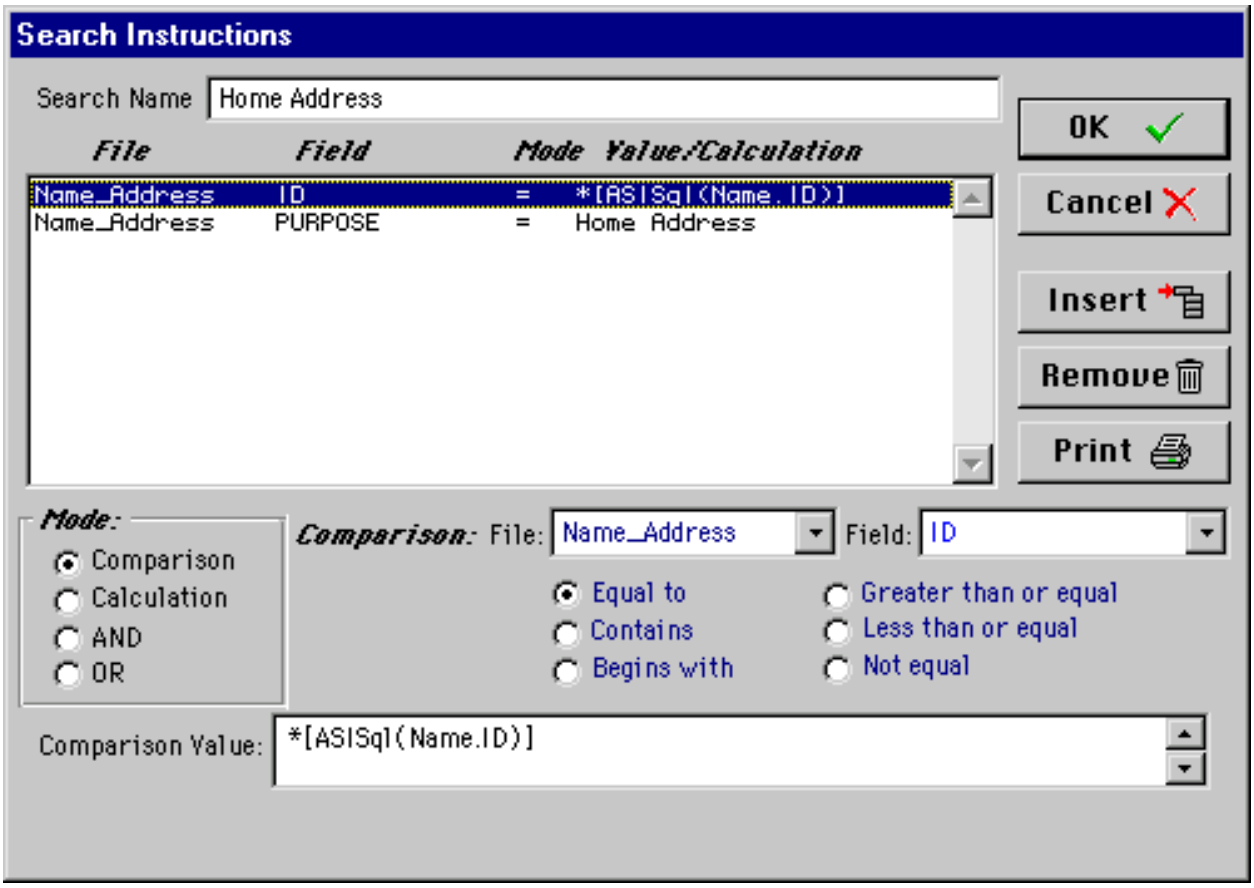
4. Enter the Search Name.
5. (Optional) Select the Mode. This option allows you to export only the files/fields that meet defined criteria (Comparison, Calculation, AND, OR).

   Note: If the Comparison Value is a field value, enter an asterisk (*) before the field name.
6. Click OK twice to save and return to the Export Utility window.

   Tip: You can specify search criteria from a record in a file that is not one of the three Select Files or from another record within a Select File. If you are pulling information from a file other than a Select File, you must relate the file to one of the Select Files in the search criteria.



You can use SQL statements to specify the Comparison Value. For example, if Name is a Select File and you want to bring in the Home Address record, enter Name_Address.ID to search for a specific address. For the Comparison File/Field and enter *[ASISql (Name.ID)] for the Comparison Value, as shown in the following example.



Specifying Export Field Formats

Export field formatting is entered in the Comparison Value section of the Export Utility window. You can specify formatting for constants, iMIS field values, and Omnis calculations. You can also specify if/then processing of the output by formatting the export output with condition statements. This step narrows the general search criteria for specific fields.

To format export fields

1. Select Utilities > Data Transport Utilities > Export Utility
2. Select an Available Export.
3. Click Edit.
4. There are three types of values that can be exported: a constant, a value contained in an iMIS field, and an Omnis calculation. Enter the formatting in the Comparison Value field.

- To specify the format for a constant (literal) value, type a double-quotation mark followed by the value. For example, if the first four characters of the export record must contain the value 0001, type "0001 in the Comparison Value field.
- To specify the format for an iMIS field value, type the field name, for example, Name.MEMBER_TYPE.
- To specify the format for an Omnis calculation, type an equal sign followed by the calculation.
  For example, if you want to export the area code of the home telephone number field, type =mid(Name.HOME_PHONE,2,3). This statement exports the second, third, and fourth characters from the Name.HOME_PHONE field.

5. (Optional) Specify the desired Length of the field. This allows you to truncate or extend the field length.
6. (Optional) Enter a code in the Format field (see below).
7. Click Add to save the format.
8. After all formatting instructions are added, click OK to save the formats.

   The following table lists the available Format Codes.

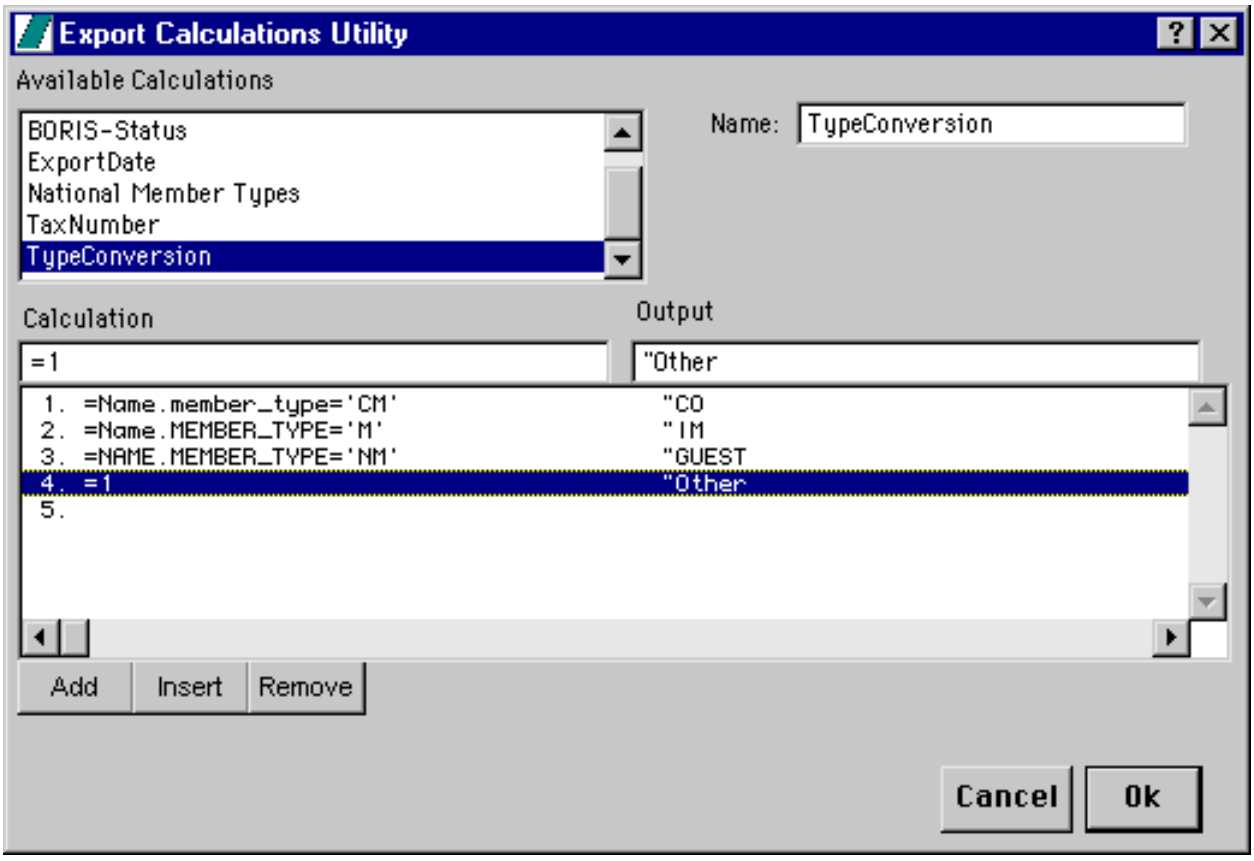
1	Exports the value on the first record only (useful for header records). Must be in the first position of the Format field.
C	Formats the output to initial capital letters
D6	Exports the value as a date in the MMDDYY format
D6/	Exports the value as a date in the MM/DD/YY format
D8	Exports the value as a date in the MMDDYYYY format
D8/	Exports the value as a date in the MM/DD/YYYY format
F	Appends a LF (line feed) return to the end of the field
L	Formats the output to all lowercase letters
P	Pads the field to the length specified in the Length field with the character immediately following the P

P0	Pads the field without zeros
N	Specifies all blank or zero field values to be output as 'Null'
N2	Same as N except that the characters. , - $ ( ) are saved
R	Appends a CR (carriage return) feed at the end of the field. Note: This code should be used with the last field of each format.
U	Converts the output to all uppercase letters
S	Skips the delimiter and concatenates with the next export column
X	Updates data in the iMIS database. Note: You must include search criteria and a calculation with this format. The search criterion identifies the specific record to be updated. The calculation determines the value that is output in the export record.
6X	Indicates which record will be selected when searching extra records. For example, the code 62 will take the field value from the second record that matches the search criteria.
Y	Outputs a YES or NO. If the field value or calculation in the Value field evaluates True, a YES is exported. Otherwise a NO is exported.
y	Same as Y, except outputs a Y or N

To format output with condition statements

You can format the export output with condition statements by creating a series of IF statements with corresponding output values.

1. Select Utilities > Data Transport Utilities > Export Utility.
2. Select an Available Export and Search. Highlight an export Value.
3. Click Edit Calculations to display the Export Calculations Utility window.



4. Click Insert at the bottom of the window and click in the Name field to add a new name for the calculation.
5. Click Add to add a calculation or condition statement. In the Calculation field, type an equal sign followed by the calculation, for example, =Name.MEMBER_TYPE='CM'.
6. In the Output field, type a double quotation mark followed by the desired output value, for example "CO. In this example, every CM Member Type is exported as a CO value.

   You can add as many calculations as you need. The utility exports the result of the last True calculation. The result can be an iMIS field name, a constant, or an Omnis calculation.
7. Click OK to save the calculation. The calculation is now listed as an Available Calculation on the Export Calculations Utility window.

   To load record formats from other compatible software

To load records from compatible third-party software applications, the records must be comma- or tab-delimited. Each record to be loaded must contain the following fields in this exact sequence: Value, Length, Format, Calculation, and Search.

1. Open the Export Utility window: Utilities > Data Transport Utilities > Export Utility
2. Select an Available Export.
3. Click Edit.
4. Click Load to select the file to load into the export definition.
5. Click Open to start the import process.
6. Click OK to save.

Running an Export

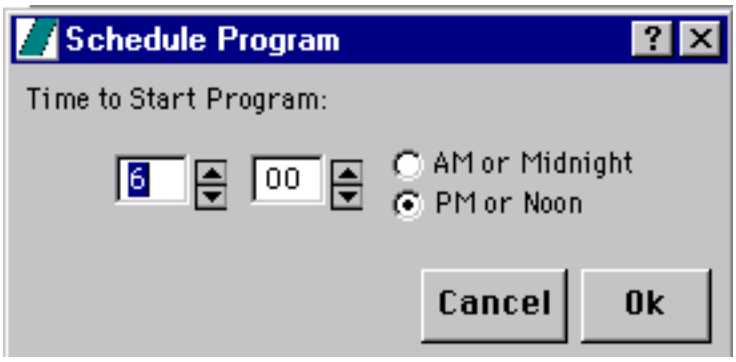
To run an export on demand

1. Select Utilities > Data Transport Utilities > Export Utility.
2. Select the Available Export to run.
3. Click Go.
4. When prompted to confirm the run, select Yes.

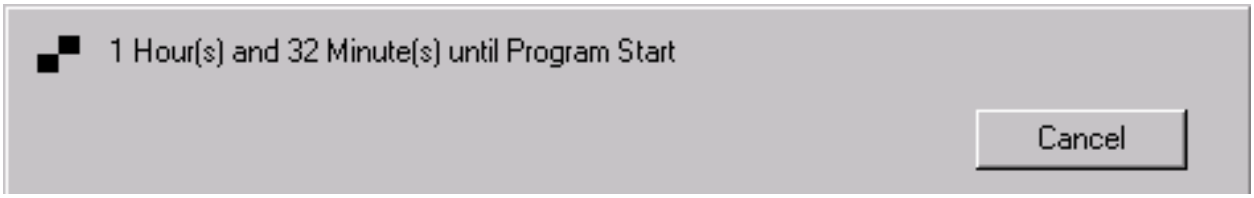
To schedule an export

The export should be scheduled after you have finished work for the day.

1. Open the Export Utility window: Utilities > Data Transport Utilities > Export Utility.
2. Click Schedule to open the Schedule Program window.



3. Select the time to start the export by using the up and down arrows.
4. Click Ok. The remaining time until program start displays.



Printing an Export Definition

You can print the export definition to a printer or to a file for use with a third-party software application.

To print an export definition to a printer

1. In File > Report Destination, set your report destination to Printer.
2. Open the Export Utility window and select the Available Export to print.
3. Click Go.
4. Click Print.

To print an export definition to a file

1. In File > Report Destination, set your report destination to Screen.
2. Open the Export Utility window; select the Available Export to print.
3. Click Export.
4. Enter the desired file path.

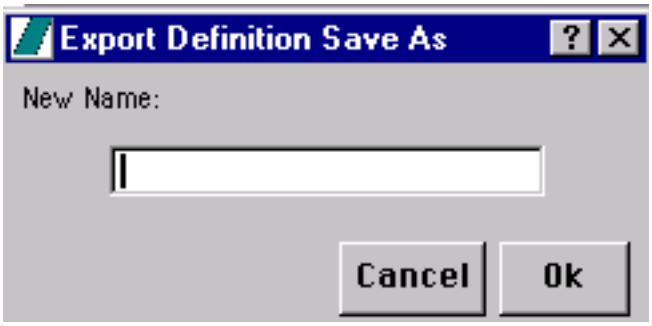
5. Click Save. The system exports the file to a print file (.prn) that can be read by compatible software applications.

Cloning an Export Definition

You can clone an existing export definition and make changes to create a new export definition.

To clone an export definition

1. Select Utilities > Data Transport Utilities > Export Utility.
2. Select an Available Export.
3. Click Save As on the Export Utility window to display the Export Definition Save As window.



4. Type the New Name for the export definition.
5. Click Ok to save the file with a new name.
6. Make changes in the new file and save.

Viewing the Activity Record

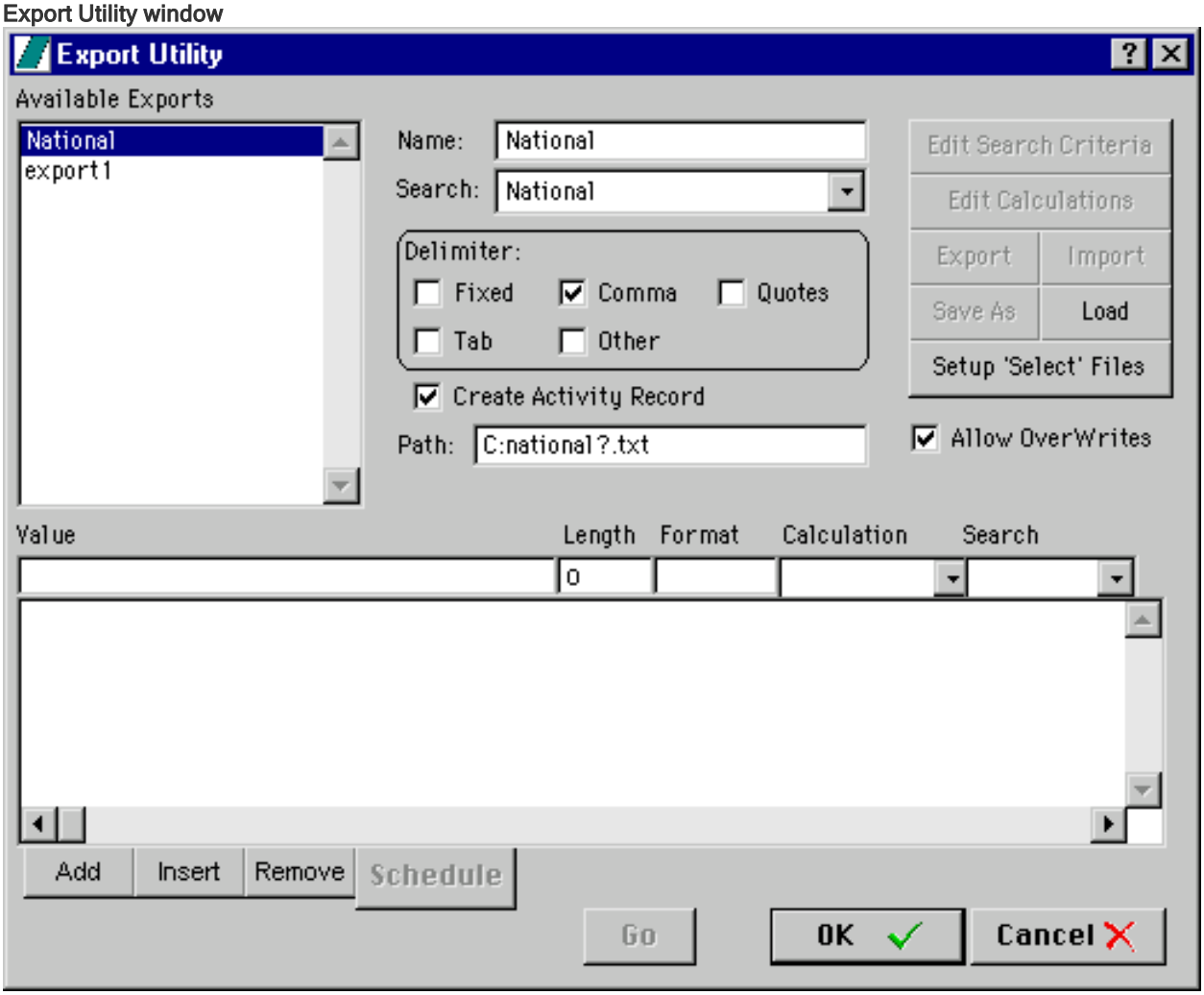
If the Create Activity Record option is selected in the Export Utility window, iMIS records the date the export record was created and saves a copy of each member's export record.

To view the activity record

1. Make sure the Name file is one of the Select Files in the export definition.

2. Create an activity named EXPORT in Customers > Set up module > Activity Types.
3. View the activity record in Customers > Manage customers > Activity.

Export Utility window



Utilities > Data Transport Utilities > Export Utility

Available Exports

List of user-defined export definitions

Name

Name of selected export definition

Search

Name of user-defined search criteria

Delimiter

Character placed between fields

- Fixed – no delimiter
- Tab
- Comma
- Other – specifies other delimiter in the field that appears
- Quotes – encloses text in double quotes. This is helpful if a comma delimiter is required and some text fields contain commas. (Note: This field displays only when a delimiter other than Fixed is selected.)

Create Activity Record

Option to record each export record as a member activity in the iMIS database

Path

Directory and file name for the export file

Edit Search Criteria

Opens the Select Search Instructions window

Edit Calculations

Opens the Export Calculations Utility window

Export

Opens the Set print file name window to save the selected export definition to a file

Import

Opens the Select import file window to import a file containing export data formatting information

Save As

Saves a copy of the export definition with a different name

Load

Opens the Select import file window where you can select and insert a record template from compatible third-party software applications such as MS Excel™. Each record template loaded must contain the following fields in this exact sequence: Value, Length, Format, Calculation, and Search

Setup 'Select' Files

Opens the File Export Utility - Select Records window

Allow OverWrites

Option to allow the file to be overwritten each time you run the export definition

Value section

Specific formatting information is entered here.

Value

The constant value, iMIS field value, or Omnis calculation to be formatted

Length

User-defined length of the Value field

Format

Code to specify data format

Calculation

List of available calculations

Search

List of available search names

Add

Adds a new line in the Value text box

Insert

Inserts a line between existing lines in the Value text box

Remove

Removes the selected line in the Value text box

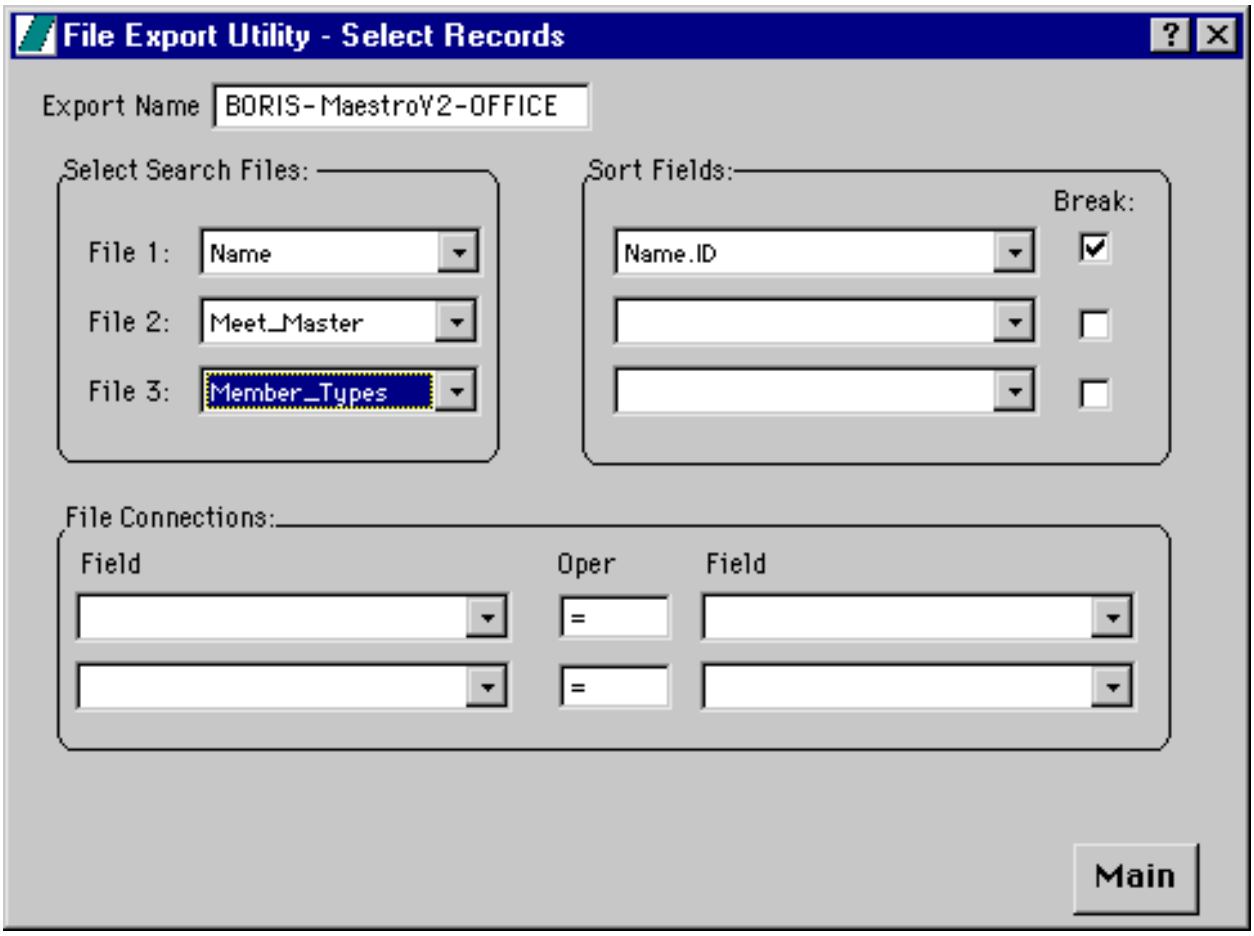
Schedule

Opens the Schedule Program window

Go

Runs the export

File Export Utility - Select Records window



Utilities > Data Transport Utilities > Export Utility, click Setup ‘Select’ Files

Export Name

User-defined export definition name

Select Search Files

Select File(s) for the export definition

Sort Fields

Defines sort order

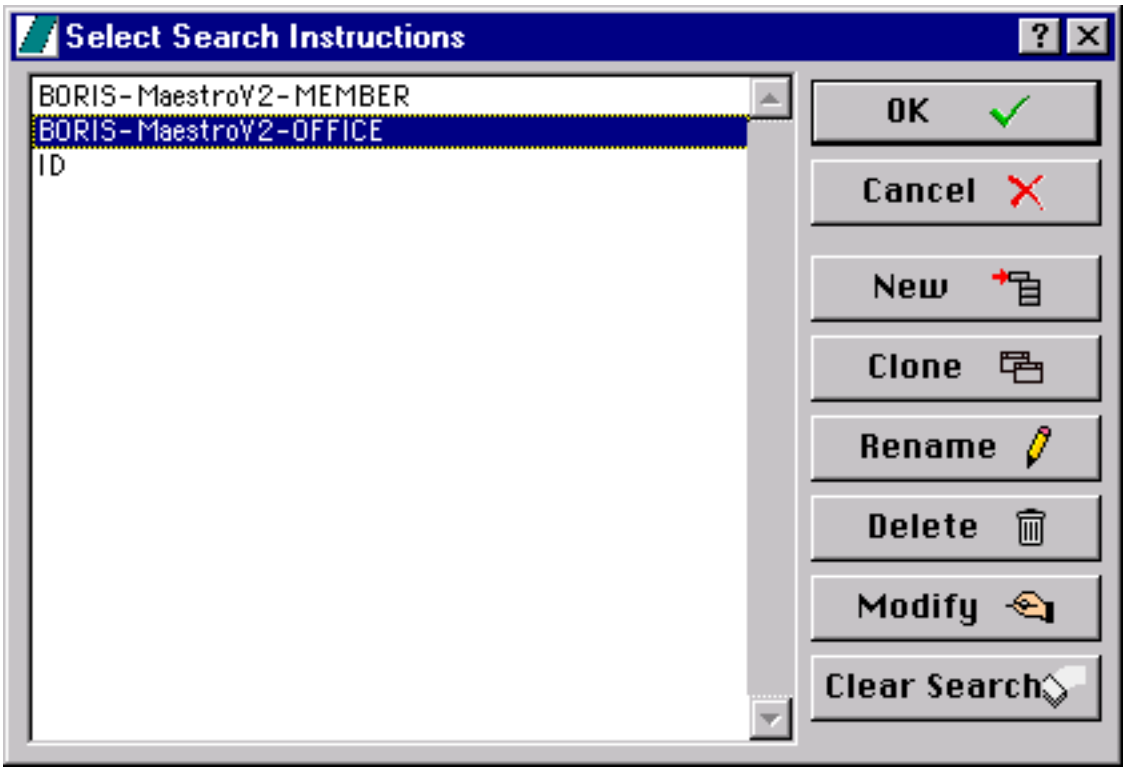
Break

Creates an export record whenever the value in the Sort field changes

File Connections

User-defined file/table joins

Select Search Instructions window for Export Utility



Utilities > Data Transport Utilities > Export Utility, click Edit Search Criteria

OK

Saves changes made to the search record

Cancel

Closes the Select Search Instructions window and returns to the Export Utility window

New

Opens the Search Instructions window to create search instructions

Clone

Makes a copy of the selected search instruction

Rename

Allows you to rename the selected search instruction

Delete

Deletes the selected search instructions

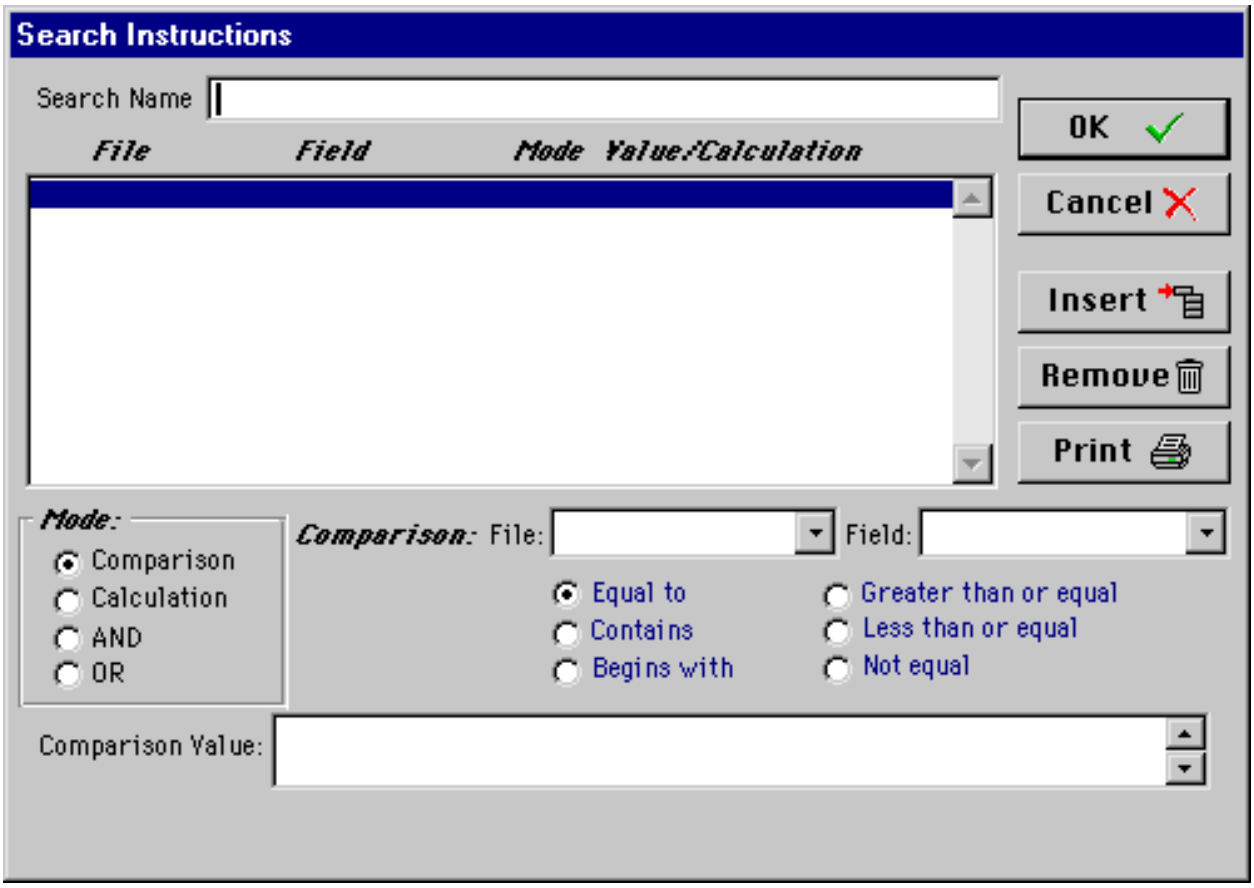
Modify

Opens the Search Instructions window to modify the search instructions

Clear Search

Clears the window of any search instructions and returns to the Export Utility window

Search Instructions window for Export Utility



Utilities > Data Transport Utilities > Export Utility, click Edit Search Criteria, click New

Search Name

User-defined name for search criteria

Mode

Allows you to export only the files/fields that meet defined criteria (Comparison, Calculation, AND, OR).

File

File (iMIS table) to be used for comparison

Field

Drop-down list of available fields in the selected file

Comparison Value

Value to be compared with selected field value

OK

Saves the search instructions

Cancel

Closes the window without saving new search instructions

Insert

Inserts a line in the Comparison Value text box

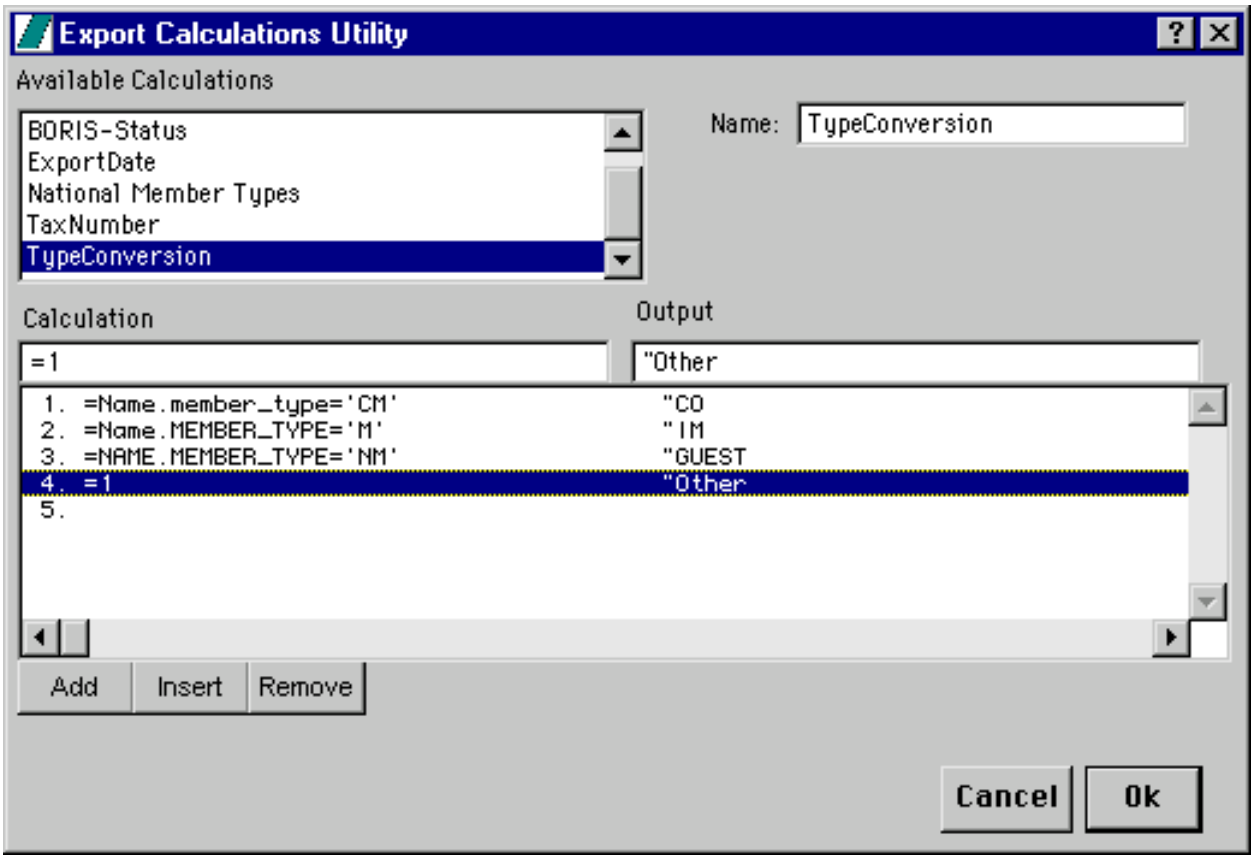
Remove

Deletes the selected line in the Comparison Value text box

Print

Prints a report of the comparison instructions

Export Calculations Utility window



Utilities > Data Transport Utilities > Export Utility, click Edit Calculations

Available Calculations

List of user-defined calculations

Name

Name of selected calculation

Calculation

Calculation or condition statement

Output

Desired output value when Calculation evaluates True

Add

Adds a line in the Calculation text box

Insert

Inserts a line between existing lines in the Calculation text box

Remove

Deletes the selected line in the Calculation text box

Cancel

Cancels editing of the calculation

Ok

Saves the calculation

iMIS Table/Field Formats

Table layout overview

The primary table (file) in iMIS is the Name table, which is the internal system label for the member/contact file. It contains name, address, categorization, and demographic information for each member/contact that you track through iMIS. All iMIS modules interact with and retrieve information from this table.

The other main table that supports membership processing is the general purpose Activity table. It contains records that track historical and participation details, such as meetings attendance, committee service, dues payments, product purchases, correspondence sent, and calls logged. The information in this table is commonly accessed for analysis or marketing reasons.

Another table you may want to use is the Subscription table, which tracks all dues and subscription line items billed and collected.

Referencing the fields

When you want to access or reference a field in iMIS, you can often select from a field list. To export iMIS fields, format the field names exactly, including precise capitalization and punctuation. Table (file) names appear with initial capitals (with underscores as needed), field names appear in all capitals (with underscores as needed), and the two parts are connected with a period.

iMIS files to use for export

The following are the recommended iMIS tables to use to export data:

- Name
- Activity
- Subscription
- Orders
- Order_Lines
- Trans
- Invoice
- Invoice_Lines

Avoid using other iMIS tables for export, because data in the other tables may not be easily linked to the primary tables.

Defining Joins for Select Files

Often, you will require data from more than one iMIS table for export. For example, you may need FULL_NAME and COMPANY from the Name table and TYPE='DUES' and BALANCE from the Subscription table. Since there is no membership data in the Subscription table, you must access the Name table. To use data from two or more tables, you must join them.

To join files (tables) is to specify which fields are equivalent so the files can relate to each other correctly, record by record. In effect, joining glues the files together for the export process. The most common joins in iMIS center on member ID numbers. A join across three tables might be:

Name.ID = Activity.ID

Name.ID = Subscription.ID

Ordering the Joins

The order of your table joins can impact performance substantially. Although the optimal order depends on the report, the key iMIS joins are:

Name.ID = Activity.ID

Name.ID = Subscription.ID

Name.ID = Invoice.BT_ID

Orders.ORDER_NUMBER = Order_Lines.ORDER_NUMBER

Product.PRODUCT_CODE = Order_Lines.PRODUCT_CODE

Name.ID = Orders.BT_ID

Troubleshooting Joins

If you experience problems such as too much data being returned, multiple records being returned, or endless data retrieval, you may not have joined the files correctly.

If you are experiencing performance problems with a report that uses a join, try these fixes:

- Switch the order of the files.
- Make sure that the files included in the join are Select Files in the export definition.

Task Viewer

You can use the Task Viewer to view, edit, delete, and add tasks.

Tips for managing tasks

- You can access the Task Viewer from your Home page or iMIS System Setup. To access tasks from your Home page, select Home and select View tasks.
- Any user can modify the status of any task at any time, even if the task has already been completed.
- By default, a task can only be seen by its creator, an administrator, or a user who has been assigned the task.
- By default, only tasks that are currently in progress display. You can view completed tasks if needed.
- When adding more than one task, you must save and close the window after adding each task.

Workflow

You can use the iMIS System Setup to view the workflow queue. You can view workflow queue items that are currently running or that are waiting to be run. You can also view failed workflow queue items and delete or reschedule any failed workflow queue items.

Note: If multiple workflow processes are queued, processing of these items will continue until all workflow services associated with the database are stopped.

Workflow engine

Understanding process workflows

Throughout iMIS, there are many examples of workflow processes:

- Processing orders through order entry, confirmation, approval, shipping, shipping notification, invoicing
- Processing a member application

- Signing up an exhibitor and following and tracking the process through the various contracts and order requirements
- Processing opportunities
- Issue Management
- Marketing campaigns
- Timed responses to inactivity
- Multi-part mailings: Letters and labels to go with the letters

These are examples of what we will call process workflow and generally are thought of as persistent workflows, which might take a few minutes, days, or even months to complete.

Workflows typically:

- Have an ownership structure.
- Are related to a specific parent object, like an order, complaint, and so on.
- Have a set of tasks that must be executed according to business rules.

Workflow engine components

To deal with this pattern of needs on a consistent basis, iMIS provides a Workflow Engine.

There are two primary components of the workflow engine:

- Process Definition Rules – Process definitions list all of the tasks for the workflow as well as the rules as to when the tasks are to be executed, and what the subsequent actions are to be initiated upon task completion. Tasks need not all execute serially. For instance, a workflow might have a step that requires approval from multiple sources, not necessarily sequentially.
- Workflow Instances – Workflow instances are the actual workflows in action. Workflows might carry their own process definition rules within, or might simply refer to the standard definition for the workflow type. When rules are carried by the workflow, they might be

constructed or modified dynamically by applications. Workflow instances have one or more owners with specific roles.

How iMIS workflows work

As workflows progress and workflow rules are interpreted, work items (or tasks) are generated. Tasks are generally assigned to specific individuals or process queues. Automatic processes are executed without human intervention. People-oriented queues show as tasks to your users. Tasks are never deleted; they are only marked complete. Tasks record time and, in some cases, effort for completion. The analysis of task data performance data can be a good source of information for process improvement.

The workflow itself can carry state data, document attachments, references to customers and their roles.

Workflows can run totally off their static definitions, or be created or modified by runtime processes.

Workflows are always used for system processes such as print invoices, print AR statements, and so on. Since workflows are extensible, field users can add or subtract steps to these processes. Workflows are used to move most all of the older hard-coded processes like print invoice, convert order, do due billing run from hard-coded processes to extensible processes and allow installers to mold these processes to customer needs in a consistent way.

Workflows can be executed in a number of environments. They can run silently in the background as queues of work are worked off by the workflow engine's background and scheduled processes, or can be run interactively. In the interactive situation, a standard dialog, similar to an installer dialog, displays progress and asks for intervention as required.

An initial implementation of the workflow engine exists in Process Manager. However, that implementation did not implement business rules or automatic application execution.

Process engine

Understanding list-based processes

Another common pattern in iMIS is the situation in which there is a list of objects (1-n), where you would like a particular process to be performed across the list. Examples of this pattern:

List	<—	Process	Template
Subscription Group IQA Query Individual person	>	Print a Crystal report	Report.rpt
		Print an HTML Report	XSL template
		Print Labels	Labels.rpt
		Send an e-mail	Letter template
		Send best available of: report, fax, or e-mail	Customer parameters, report/letter templates
		Create a subscription group	Group, role, etc.
		Register people for a event	Event, standard functions
		Transmit to another site	Custom parameters
		Add list to a marketing campaign	Campaign information
		Render a web roster	XSL Template
		Exchange Export	Custom parameters
		Specialized exports	As Needed

Though there are many occurrences of this pattern, perhaps it would be helpful to isolate our study of this problem to the single situation of an ad hoc query tool. Typical tasks could include:

- creating a query that selects a particular group of customers
- sending something to the list: perhaps an e-mail, a letter, a fax, or add them to a marketing campaign (a subscription group)
- naming or editing our own letter or e-mail template
- scheduling for subsequent execution

We would also like to be able to carry out these types of processes over time on or to new types of processes, without having to update our query selection tool constantly.

Process engine services

Our implementations that deal with this pattern are known as Process engines. Process engines are generally services, encapsulated in objects that are sub classed upon the base Process Engine.

Process Engines must inherit the base process engine class and provide a few basic services (methods).

- On demand, they must supply a visual template editor which is sub classed from the Process Engine Template base class. The template editor interacts to select or define a template specific to the type of process. For instance:
- Crystal reports template editor allows a user to specify the location of a crystal report and any parameters that will be needed to execute the report.
- Mail merge process engines specify or define on the fly a mail-merge template.
- A multi-output process engine may specify the rules about when to choose which media type and what letter templates will be used. A multi-output process engine is an application that receives an initial input then delegates subsets of the input list downstream to other process engines.
- Provides standard methods to execute a process, monitor progress, log errors, and report results.

Process Engine objects are frequently bound to query objects. Template Process Engine objects (such as a process engine for Crystal Reports but no report specified), and specific process engines (such as a process engine for a specific Crystal report), are generally persisted in document libraries with or without bound query objects that, in term, provides a catalog of available processes to users and administrators. In fact, process engines bound to query objects present a major part of the iMIS application to user, especially for the standard and ad hoc reports users use continuously.

Process Engine objects with bound query objects are frequently queued as tasks within a workflow for subsequent execution. Multiple process object tasks can be included into a single workflow for report sets or multi-step processes.

Example process engines

- Crystal reports
- XSL/HTML reports
- E-mail system
- Word Merge
- Create subscription group from query
- Add people to marketing campaign (same as above)
- Register people from query
- Multi-output process engine

Uses for process engines (with bound query objects)

- Data-oriented web pages
- Reports and the report catalogs
- Dues billing run definitions

Utilities

Document System

The Document System is the web-based document management system for your entire iMIS system, providing unified management, versioning, and security of your organizational content assets. It lets you view and maintain the full range of definition objects for iMIS:

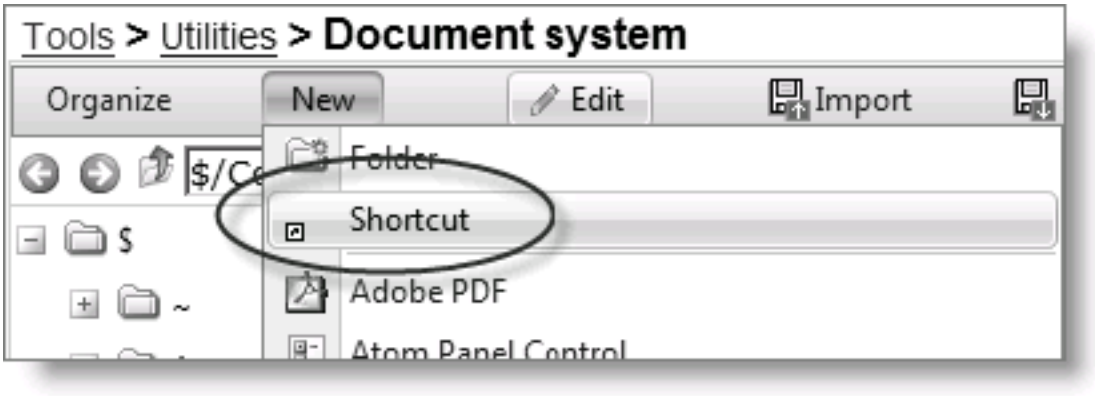
- Business objects, used by Business Object Designer (BOD)
- Queries, used by Intelligent Query Architect (IQA)
- Workflow definitions
- Reports
- HTML files and Microsoft Word files, used for mail merge output

Filtered views

When you use the Document System, you see every type of object (document), but when you see the Document Browser throughout the rest of iMIS, the view is filtered to show you only what you need for that situation. For example, when working with IQA, the Document Browser only shows you queries. In the same way, toolbar commands such as New are filtered so that, when you are working in Business Object Designer, you can create only business objects.

Shortcuts

In the Document System, you can move and copy objects and folders to other folders. Beyond this, you can also create a virtual link (alias) in one folder that points to another object or folder, which keeps you from duplicating objects or folders that you want to share in different contexts.



Security access

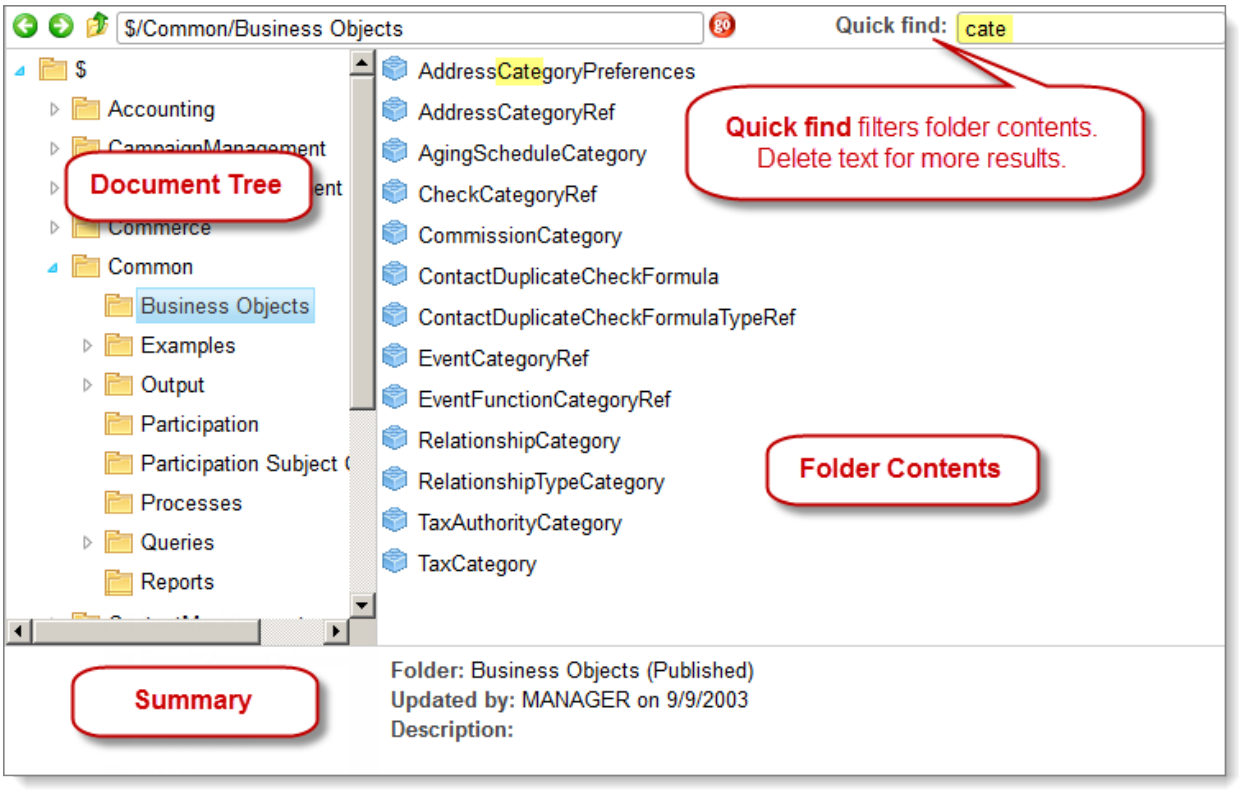
iMIS users that belong to the SysAdmin security role can see and maintain all definition objects that exist in the Document System. Users who do not belong to the SysAdmin role see a more limited set of definition objects that is determined by the security privileges (see "Setting security access for folders and objects") that are set on each object or on each folder that contains objects.

For example, you can limit the visibility of an entire folder and its definition objects to a specific user-defined security role such as Fundraising Users. Alternatively, you could

define that same folder to be visible to Everyone, but limit a few definition objects in that folder to be visible only to Fundraising Users.

Document Browser

Selecting Tools > Document System opens the Document System, which has a toolbar at the top and the three-pane Document Browser below it:



The Document Browser also appears throughout iMIS for locating relevant objects, which it does by filtering the view so that you only see folders and objects that are appropriate for your current task. The Document Browser always appears with these three panes:

1. Document tree (left pane): displays all folders that are relevant to the context in which the Document System is displayed.
2. Folder contents (right pane): displays the contents of the folder that is selected in the document tree area. Folder contents can comprise definition objects, subfolders, or links to items that are located in a different folder.

Tip: The Quick find box dynamically filters the folder contents, to help you to find items quickly when there are large numbers in the folder. Delete text to see more results. In Desktop, press F12 to apply the filtering.

3. Summary (bottom pane): summarizes the basic properties of the item that is selected in the folder contents area. To show or hide the summary area, select Organize > Display Summary.

Managing document folders

The document tree area of the Document System lists the folders available in the current view of the Document System. The folders that are visible depend on the roles and groups assigned to your user record as well as by what feature of iMIS you are using. The full extent of the folders available in the Document System can be seen only by SysAdmins.

Multiple hierarchies, different roots

There are several Document System hierarchies, each used for different areas of iMIS:

- $/ – Business Object Designer (BOD) has its own hierarchy of business objects. The root is represented by a $ character.
- @/ – Content folders and content records exist in their own hierarchy. The root is represented by a @ character.
- ~/ – Sitemaps each exist as their own hierarchy. The roots are represented by ~ characters.
- $/– All other definition objects exist in the main Document System hierarchy, portions of which are also exposed in other features of iMIS. The root is represented by a $ character.

Tasks that you can perform

- Click an item to select it for use with a toolbar command and to display a read-only summary of its basic properties in the summary area.
- Double-click a folder to open the folder and display its contents.

Toolbar behavior when folders are selected

When a folder in the document tree area is selected, the toolbar commands behave as follows:

- Organize > Refresh refreshes the document tree.
- Organize > Cut, Organize > Copy, and Organize > Paste enable you to copy or move entire folders, including all of their descendants. The cut or copied folder and all of its descendants are placed inside the folder that is selected when you use the Organize > Paste command.
- Organize > Select All selects all contents within the selected folder.
- Organize > Delete moves the selected folder and all of its descendants to the Recycle Bin.
- Organize > Properties shows a read-only summary of the selected folder's basic properties.
- Organize > Display Summary shows or hides the summary panel for the object selected.
- New displays a drop-down list from which you can choose a new folder or definition object type to create in the selected folder. When you select an object type, a properties window appears in which you can define the object. The object types shown in the drop-down list are determined by the properties of the selected folder, which you can examine by using the Edit toolbar command.
- Edit opens a window that enables you to edit the definition of the selected folder.
- Import imports an external XML file (created by the Export command on a different iMIS database) into objects in the Document System. (You cannot use Export and Import to make copies of objects within the same iMIS database.)

  The Upload button reads the XML file contents and displays a list of the definition objects that were exported to the XML file. You can select which of the objects to import, and whether to overwrite objects with the same database GUID in the destination folder or to create new copies of the objects. You can also opt to import the objects to the folder from

which they were originally exported, or to override that default destination with the selected folder.

For versioned document types, if a newer version of the object exists in the Document System, then the newer version is not overwritten during the import. Instead, the imported object is added as an archived version of the object. To replace the newer version of the object with the imported object, select Versions from the toolbar, choose the correct version, and click Revert.

- Export exports all selected folders and definition objects into a single XML file, which can later be used to import those objects into the same folder or a different folder in a different iMIS database. (You cannot use Export and Import to make copies of objects within the same iMIS database. To make copies, use Organize > Copy and Organize > Paste.)
- Versions displays a list of the existing versions of the folder, from which you can:
- Export a specific version to an XML file.
- Purge a specific version from the version list, removing all traces of that version from the system.
- Copy a specific version to a new folder with a different name.
- Create a new version based on any existing version by selecting the version, clicking Revert (which creates a new working version), and then publish the working version. If you make no changes to the working version you are effectively reverting to the state of the selected version, although technically it becomes a more recent version in the list of versions.
- Run cannot be used in this context. You must use this command from the folder contents area.
- Publish transforms all working versions of the descendant definition objects in the selected folder into published versions of those objects. Only the most recent published version (of a versionable object) is actively used by the system. You must select the Publish children as well? checkbox when publishing a folder.

To manage folders and objects in the Recycle Bin

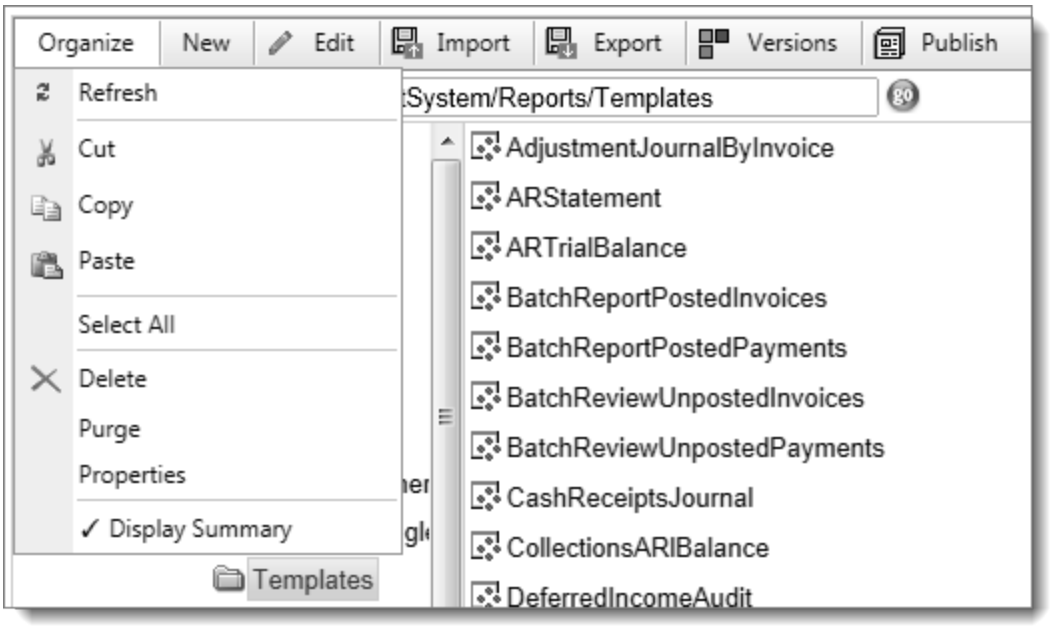
Folders and definition objects that have been deleted are moved to the Recycle Bin at the bottom of the Document System hierarchy.

- To permanently delete individual folders and definition objects that you do not think you'll ever need again, select an object listed in the recycle bin and from the toolbar choose Organize > Purge. To permanently delete the entire contents of the recycle bin, select the Recycle Bin itself and from the toolbar choose Organize > Empty the Recycle Bin.
- To restore a deleted definition object, select it and from the toolbar choose Versions. In the version history that appears, click the Recycled version at the top of the list and click Revert. The definition object is moved to its original parent folder in the hierarchy, and its status changes to Working. You must then re-publish the definition object to make it active again.

  Note: If the definition object's original parent folder no longer exists, the restored object is placed in the root folder of the Document System hierarchy. You must move it out of the root into another folder before you'll be able to publish the object.

Managing folder contents

The folder contents area of the Document System lists the definition objects, subfolders, and links that are stored in the folder selected in the document tree area.



Example of the folder contents area of the Document System

Tasks that you can perform

- Click an item to select it for use with a toolbar command and to display a read-only summary of its basic properties in the summary area.
- Select multiple items for use with a toolbar command or right-click command by holding down Shift or Ctrl while clicking each item. The last object you select is the one whose properties are displayed in the summary area.
- Double-click a definition object to perform one of the following actions (depends on the type of object):
- Open a properties window that enables you to edit the definition of the object.
- Open the Document Utility.
- Double-click a folder to open the folder and display its contents.

Toolbar behavior when items are selected

When an item in the folder contents area is selected, the toolbar commands behave as follows:

- Organize > Refresh refreshes the document tree.
- Organize > Cut, Organize > Copy, and Organize > Paste enable you to copy or move the selected definition objects. The cut or copied objects are placed inside the folder that is selected when you use the Organize > Paste command.
- Organize > Select All selects all contents within the folder.
- Organize > Delete moves the selected objects to the Recycle Bin.
- Organize > Properties shows a read-only summary of the selected object's basic properties.
- Organize > Display Summary shows or hides the summary panel for the object selected.

- New displays a drop-down list from which you can choose a new folder or definition object type to create. When you select an object type, a properties window appears in which you can define the object. The object types shown in the drop-down list are determined by the properties of the folder in which you are working. You can examine these folder properties by selecting the folder in the document tree area, then choosing the Edit toolbar command.
- Edit opens a window that enables you to edit the definition of the selected folder, object, or of the object to which a selected link points.
- Import imports an external XML file (created by the Export command on a different iMIS database) into objects in the Document System. (You cannot use Export and Import to make copies of objects within the same iMIS database.)

  The Upload button reads the XML file contents and displays a list of the definition objects that were exported to the XML file. You can select which of the objects to import, and whether to overwrite objects with the same database GUID in the destination folder or to create new copies of the objects. You can also opt to import the objects to the folder from which they were originally exported, or to override that default destination with the current folder.
- Export exports all selected folders and definition objects into a single XML file, which you can use later to import those objects into the same folder or a different folder in a different iMIS database. (You cannot use Export and Import to make copies of objects within the same iMIS database; to make copies, use Organize > Copy and Organize > Paste.)
- Versions displays a list of the existing versions of a versionable object, from which you can:
- Export a specific version to an XML file.
- Purge a specific version from the version list, removing all traces of that version from the system.
- Copy a specific version to a new definition object with a different name.

- Create a new version based on any existing version by selecting the version, clicking Revert (which creates a new working version), and then publish the working version. If you make no changes to the working version, you are effectively reverting to the state of the selected version, although technically it becomes a more recent version in the list of versions.
- Run executes a selected query, report, or other object types that are designed to be run. If the selected object is a .PDF, .DOC, or .XLS file, this command opens the file in its assigned editor.
- Preview displays a fully rendered view of the selected navigation item, content record, or other CM object types that are designed to be previewed.
- Publish transforms a working version of an object into a published version. Only the most recent published version (of a versionable object) is used actively by the system.

Virtual linking among folders

Many Document System folders in iMIS contain a default virtual link to the Common > Shared Documents folder, which is the central location for definition objects that are available without restriction to all staff users. These virtual links enable users who are given only limited access to the Document System functionality to easily navigate back to the top of the Shared Documents sub-tree.

Caution! These default virtual links to the Shared Documents folder can be deleted by any user that belongs to the SysAdmin role.

There are also some hard-coded virtual links within the Document System, which exposes specific folders in various locations throughout the iMIS interface.

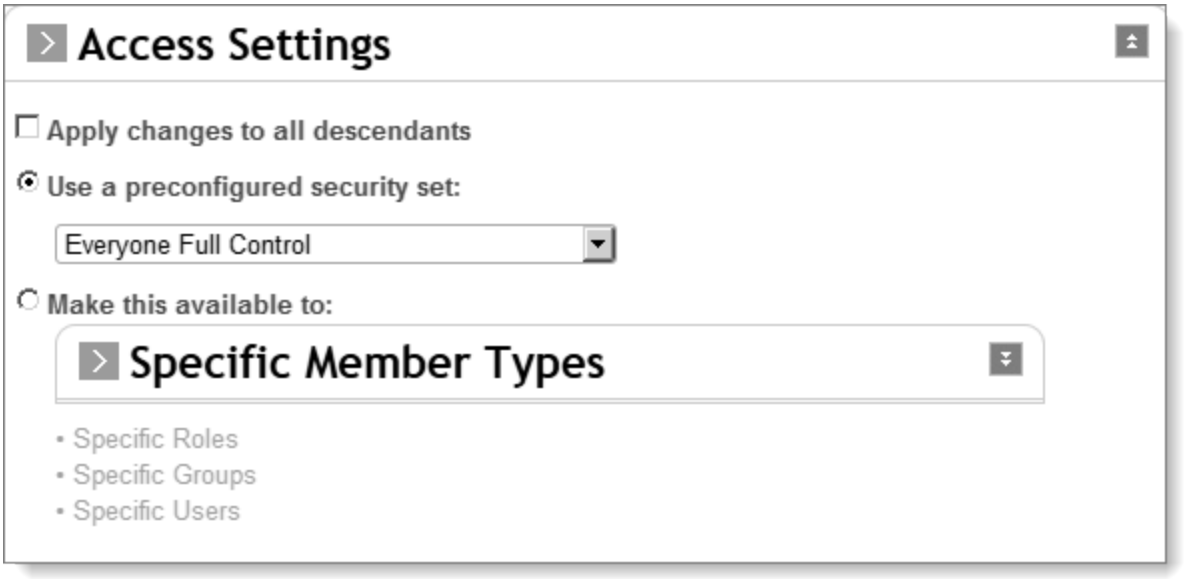
CampaignManagement > DefaultSystem > Reports View	Marketing > Campaign Management > Generate Reports
Common > Output	Marketing > View Output
Common > Shared Documents	Marketing > Campaign Management > select a source code > Source Lists tab > from Select Type drop-down list,

	choose Query
	Marketing > Segmentation > select a segment job > Definition tab > in Universe field click Shortcut to queries
	Marketing > Segmentation > select a segment job > Segments tab > select a segment > in Population field click Shortcut to queries
	Tools > Document system > New Object > Project Process Outputs > Definition tab > in Query field click ...
Common > Shared Documents > Processes	Marketing > Inserts > select an insert > Definition tab > in Output Process field click Browse for Process Engine
	Process Mgr > Set up module > Action Plans tab > select an action plan > select an email notification > in Process Name field click ...
Common > Shared Documents > ReportsView	Home page (Desktop view) > Generate Reports
ContactManagement > DefaultSystem > Queries > Advanced > Contact	Home page (Desktop view) > Advanced Queries > Contacts
	Customers > Advanced Queries > Contacts
ContactManagement > DefaultSystem > Queries > Advanced > Prospect	Home page (Desktop view) > Advanced Queries > Prospects
	Customers > Advanced Queries > Prospects
EventManagement > DefaultSystem > Queries > Advanced > Event	Home page (Desktop view) > Advanced Queries > Events
	Events > Advanced Queries
OpportunityManagement > DefaultSystem > ReportsView	Process Mgr > Generate Reports
OrderManagement >	Home page (Desktop view) > Advanced Queries > Orders

DefaultSystem > Queries > Advanced > Order	Orders > Advanced Queries
RFMAnalysis > DefaultSystem > ReportsView	Marketing > RFM Analytics > Generate Reports
RFMAnalysis > DefaultSystem > Process Engines	Marketing > RFM Analytics
RFMAnalysis > DefaultSystem > Process Engines > User Queries	Marketing > RFM Analytics > edit an RFM definition object > Definition tab > in Population Query or Transaction Query fields click Shortcut to queries
SegmentManagement > DefaultSystem > ReportsView	Marketing > Segmentation > Generate Reports

Using Access Settings

Access Settings give you a consistent way to apply security (grant permissions) to folders and objects throughout iMIS: entire websites, individual navigation items, content records, queries, business objects, and the wide array of objects that you can define, import, and store in the Document System.



Access Settings are immensely flexible: they let you tie an object's permissions to iMIS security roles, security groups, specific users, member types, or your organization's staff (licensed iMIS users).

Tip: You can meet most of your needs using the preconfigured security sets that ship with iMIS, so become familiar with those.

- Apply changes to all descendants – (Document System folder objects) Changes to this section, when saved, flow automatically to all descendant definition objects. When cleared, changes to this section apply only to the current definition object.
- Use a preconfigured security set - Specifies a preconfigured security configuration to use for this definition object, which is the default and preferred way to set permissions for definition objects. You can see the specific permissions that make up the security set in the Make this available to area.

  Tip: If a preconfigured security set is close to what you need, select it and then select Make this available to, so that the permissions granted by the security set are copied for you to work from.
- Make this available to - Lists the roles, groups, users, member types, or authorization levels that may define or view rendered output from this object. If none of the pre-configured security configurations meets your needs, you can set custom permissions here.

  The SysAdmin, Content Administrator, and Everyone roles are default system-defined security roles that are assigned to every definition object. The SysAdmin role is assigned in the definition of an iMIS user record, but the Content Administrator role is automatically assigned to every iMIS user who is a member of a content authority group (CAG) that is designated as a Master Admin CAG.

  The permissions that can be assigned to each entry in the list are:
- Full Control - Enables all of the following permissions.
- Read - Enables users to see this object both in definition windows and as rendered output in websites, but they cannot change the object's definition.

- Add - Enables users to create new objects, or to paste or import an object into the Document System.
- Edit - Enables users to edit this object's definition, but not to delete the object.
- Delete - Enables users to delete this object.
- Select - Enables users to assign a tag to content folders and content records.

Custom security groups (use sparingly)

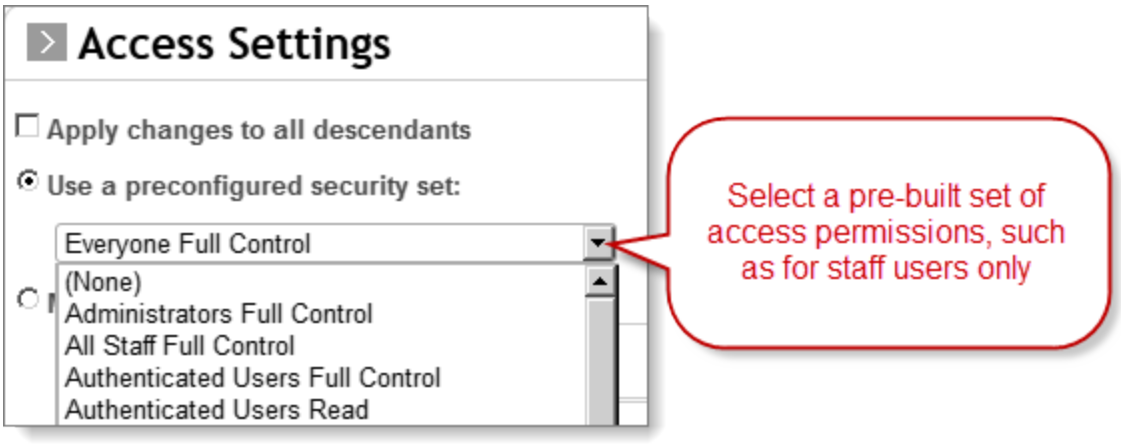
You can add/remove specific Roles, Groups, and Users and assign them each a specific set of permissions. Making this type of change to the security for an object results in a new unique AccessKey for the specified Access List permissions.

You can create a custom security group by tweaking a predefined group or building your own from scratch (using the Make available to radio button). While a custom security group offers great flexibility, it jeopardizes performance, because it adds several rows per object. If the security tables get too large (given that they are joined on every query), your system can slow significantly.

Caution! To minimize performance impacts, avoid using custom security groups where their effect multiplies: folders, Navigation items, and all children the same (unless you are using shared security, or it is mission-critical).

Preconfigured security sets

Throughout iMIS, whenever you configure Access Settings, you see a drop-down list of available security settings that you can apply to individual folders and objects. These security sets offer you easier control and faster iMIS performance than defining custom ones.



These are the key security sets you should use, from most permissive to least:

- Everyone * – no restrictions, including the public (if they can access this level/context).
- Authenticated Users * – restricts access to users who are signed in (both staff and public members).
- * Staff * – restricts access to users by licensing: Full Staff Full Control limits to Full users, Casual Staff Full Control limits to Casual users, and All Staff Full Control limits to Full and Casual users.
- Administrators * – restricts access to users with the SysAdmin role.

Tip: If you do not have the feature named in the security set (such as Certification), do not use the set.

iMIS ships with these pre-built security sets to cut down on the customization you need, for objects that should be neither unsecured (Share) nor locked for you alone (Private). Each security set contains a predefined Access List and permissions (Full Control, Read, Add, Delete, Edit) that are constant for all objects that use it. A Select permission is also available for tagged objects.

When you choose a set, the Current Access List below it updates to show the settings it includes. Look at those details to decide if the selected security set has the permissions you need.

Feature-specific default security

Most feature-specific security sets have three levels (Admin, Manager, User), each of which allows access for any level above it. For example, "Certification Users" grants access for Managers and Admins as well. Note that you can define your own access settings based on User-level security: Roles and Groups.

For example, applying Segmentation Job Default Access security means that

- users in the "SegAdmin" group get control privileges
- users in the "SegMgr" group get Read+Add+Edit+Delete privileges
- users in the "SegUser" group get Read-only privileges
- users in the "SysAdmin" role get control privileges

Setting access for folders and objects

iMIS SysAdmins have Full Control access to all folders and objects in the Document System, so they can also define security privileges for every folder and object.

Caution

- New folders have unrestricted access: When a new folder is created, the Everyone role is granted Full Control by default.
- Folder permissions are not the same as per-object permissions: you can set Control/Read/Add/Edit/Delete privileges individually for most definition object types in the Security page of its properties window, independent of the folder.
- IQA folders are special: Certain folders within the Document System are exposed through the IQA task list item in Customers, Events, Billing, Fundraising, and Orders. These folders and all sub-folders that they contain behave differently when viewed from the IQA task list item:
- You can create only queries in these folders even if the folder is defined to allow any type of definition object. Only members of the SysAdmin role who edit these folders from Tools > Document System can create the other types of allowable objects.

- If any user modifies the folder definition to disallow the creation of Query objects, the folder and all of its contents become invisible from within an IQA task list item. Only members of the SysAdmin role who are viewing the entire Document System via Tools > Document System are subsequently able to see the folder.

To define security access for a folder

1. In the Document System, select a folder and click the Edit toolbar command.
2. In the Only allow certain types of objects in the folder? area, specify the objects to be allowed in the folder.

   Multi-select object types from the list by holding Shift or Ctrl while clicking items in the list.
3. For the Access Settings, select Private or else select Use a preconfigured security set and select a set from the list, if any apply.

   Tip: For best performance, use Preconfigured security sets.
4. If you need custom access settings, enable Make this available to and complete the panel.

- For Specific Roles, select the checkbox for each system-defined role that should have access to the folder. For each role, you can click the Edit icon next to the role name to define the specific privileges for that role.
- For Specific Groups and Specific Users areas, add the groups and users that should have access to this folder, and click the Edit icon next to each entry to define the specific privileges for that entry.

5. At the bottom of the folder security definition window, click Save to commit the changes.

User defined tables

You can generate business objects from user defined tables created in the Admin Console|topic=Configure membership options. Refer to Business Object Designer for details on business objects. When you click Build All, the Build Results area will display a log of the business objects that were built, compiled, and published.

Note: Rerunning the Build All command will cause your changes to be overwritten and lost. The business objects for user defined tables are recreated by that operation.

Package Installer Utility

Go to RiSE > Utilities > Package installer:

Use Package Installer Utility to select packages for installation, view currently installed packages, and view failed installations. Although making iParts deployable is the most common use for packages, they can also include:

- iMIS document system objects, such as queries, business objects, and content types
- SQL Scripts, which run against the iMIS database during installation
- Files, such as ASCX pages, images, and Word templates

To install a package

You can use the Package Installer to update the iParts on a system and to revert them. When you run the installer multiple times on the same package, it installs only one iPart. When you run the installer with multiple packages that install the same iPart, only one iPart is created, using the data in the last package you installed.

Note: Where you see local paths specified, be sure to use the path appropriate for your system, such as C:\Program Files (x86)\ for C:\Program Files\.

1. Stop the ASI Publishing Service.
2. Save the .ipackage file to the C:\Program Files\ASI\iMIS\Net\package\pending folder. Create the pending folder if it does not exist yet.

   Go to RiSE > Utilities > Package installer:
3. Select Packages to be Installed from the Show dropdown list.
4. Click Install.
5. Restart the Publishing Service.
6. If you installed any ActiveX controls, register the OCX files.

7. If your package includes a control (iPart or ActiveX), repeat this process on each additional application server that needs to host it. For example, if you host your staff site on your production iMIS application server and your Public view on an external webserver, add the Package Installer iPart to a content record that displays in both websites. Make sure you set up the correct security permissions to the iPart's page so that only authorized users are able to access it.

   Since iMIS runs with a single database, you do not have to install a package on multiple servers if it only includes database-related objects. But a control is an application component, so you need to deploy it on each server that hosts it. A package can install multiple times on the same database.

   To create a package

1. From the command line, change the directory to the following folder:

   cd C:\Program Files\ASI\iMIS\Net\bin

2. Execute the command to create the manifest: PackageBuilder.exe -create <packageFolder>

- Replace <packageFolder> with a path to the folder that contains the source files to be included in the package. For example:

  PackageBuilder.exe -create C:\MyNewiPart

- A package.manifest file is created for you in the <packageFolder> location.

  Note: If a package.manifest file already exists in that folder, it is overwritten when you run this command.

3. In a text editor, edit package.manifest to specify the package description and the install path for each of the package's files.

   Note: The install path is relative to the Net directory, which defaults to C:\Program Files\ASI\iMIS\Net

- ASCX files (iParts) usually install to: <InstallPath>iparts/Custom</InstallPath>
- DLL files usually install to: <InstallPath>bin</InstallPath>

- For <Type>Document</Type>, the <InstallPath> refers to a path in the document system. You can either enter a file system path or a document system path, such as $/Folder-/SubFolder.
- For <Type>Sql</Type>, the <InstallPath> is not required, because the SQL in the file specified by <Name> is executed. If the <InstallPath> is specified, then the corresponding SQL file is saved to that path. Additionally, the file extension for an SQL file must be .sql, or it will be treated as the File type during the PackageBuilder -create step.

4. Execute the command to build the package: PackageBuild.exe -build <packageFolder> <packageFileName>:

- packageFolder is the path to the folder that contains the source files to be included in the package, such as: C:\MyNewiPart
- packageFileName is the pathname of the package file to be generated (which must have the extension .ipackage), such as: C:\Program Files\ASI\iMIS\Net\package\pending\ASIEUGiftAidWebPart.ipackage

  The following is a sample package.manifest file:

```
<Package xmlns="http://schemas.imis.com/2008/01/DataContracts/iParts/PackageInstaller"
xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
<Name>Exampleipart</Name>
<Description>TODO: description of Exampleipart</Description>
<Files xmlns:a="http://schemas.imis.com/2008/01/DataContracts/iParts/PackageInstaller/">
<a:PackageFileData>
<Name>Example-iPart-InstallScripts.sql</Name>
<Type>Sql</Type>
<InstallPath>SqlScripts</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>Example-ContentType.xml</Name>
<Type>Document</Type>
<InstallPath>$/ContentManagement/DefaultSystem/ContentTypes</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>MetaBuilders.WebControls.dll</Name>
<Type>File</Type>
<InstallPath>bin</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>ExampleiPart.mycompany.dll</Name>
<Type>File</Type>
<InstallPath>bin</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>xDisplayExampleiPart.ascx</Name>
<Type>File</Type>
<InstallPath>iparts\mycompany\exampleipart</InstallPath>
</a:PackageFileData>
<a:PackageFileData>
<Name>xEditExampleiPart.ascx</Name>
<Type>File</Type>
<InstallPath>iparts\mycompany\exampleipart</InstallPath>
</a:PackageFileData>
</Files>
</Package>
```

Security administration

Security Administration provides options for administering user records and the roles you can associate with user records.

For more on how licensing relates to views of iMIS, see Types of iMIS licenses and views.

Note: To administer user records and roles, your User Credentials must include the SysAdmin role.

Logons and authorization persistence

Following is information to help you control user logon behavior and troubleshoot logon issues.

Conflicts from shared Windows logins

iMIS employs the ASP.NET login controls and uses HTTP cookies for state information. If two different iMIS users share the same Microsoft Windows login on the same client system, iMIS features that use cookie data may appear to confuse one user with the other. To avoid this problem, always ensure that every iMIS user has a unique Windows login.

Authorization persistence: web clients

By default, web client users can make their authentication record authorization persistent. To disable this option, edit the Web.config file used for the iMIS application. By contrast, iMIS Administrative Console users must always log on and be reauthorized each time.

Authorization changes: locating and disabling

By default, users are allowed to change their password, but not the logon information. To enable the option to change their logon, edit the content record that contains the Change Logon Password iPart and select the checkbox Allow username change. The option to change their password can be enabled or disabled in the same way.

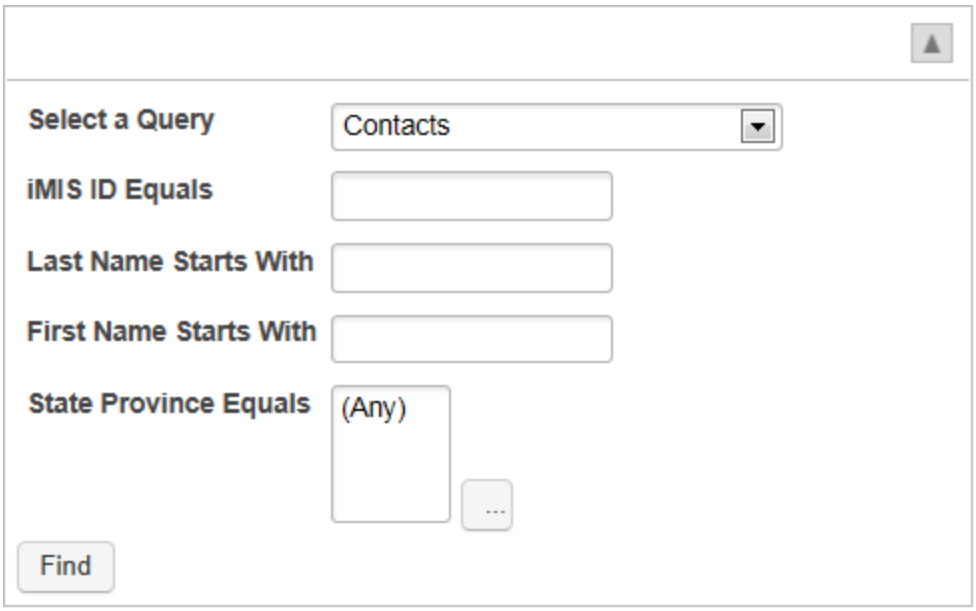
- All users, Casual, Public, and Full, can change their own logon name and password through the My Account page.
- Full users who belong to the SysAdmin role can change the logon name and password for other users through the Security Administration section of RiSE in the Staff site. (RiSE > Security administration > Users).

Users

This section provides options for finding contacts or users, and creating and modifying iMIS user records.

Go to RiSE > Security Administration > Users:

Prompts you to select a contact, so that you can create or edit its user record.

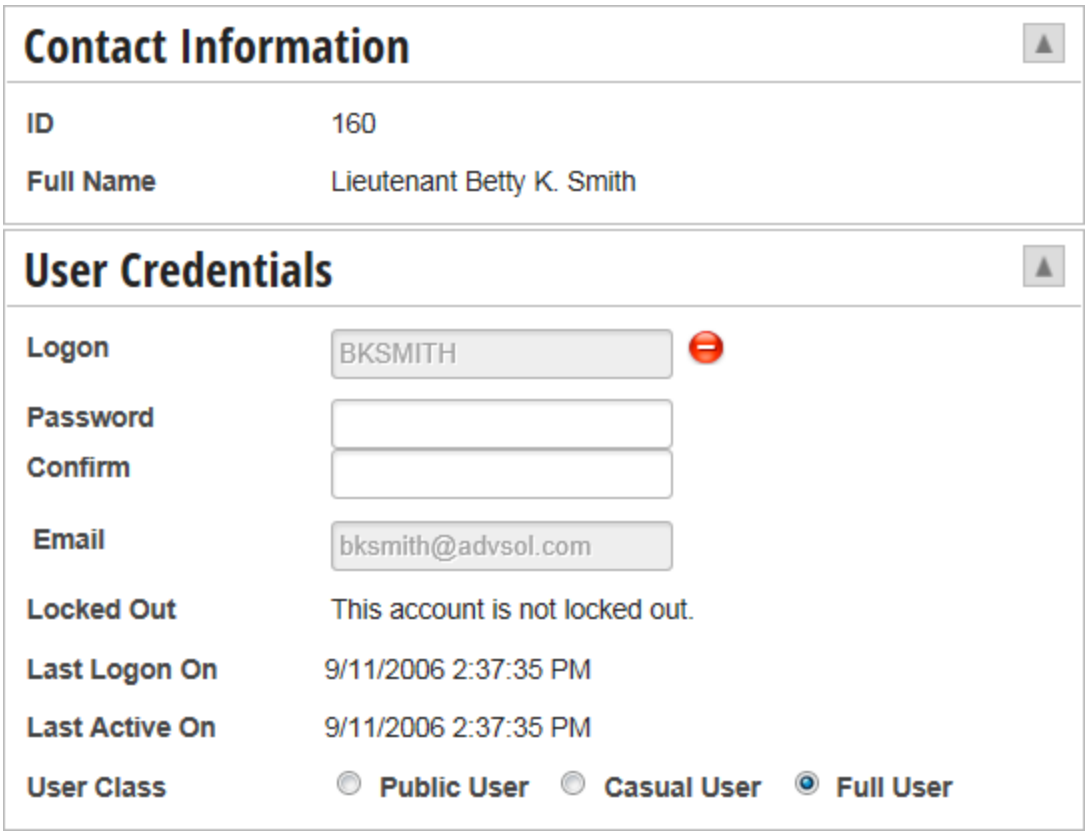


From RiSE, select Security administration > Roles

Once you select a contact record, which sections appear depends on whether you are editing its user record or creating it for the first time.

Contact Information and User Credentials

Displays authentication record data from the ASP.NET authentication store. If the contact listed in the Contact Information area is not an iMIS user, the fields in the User Credentials area are empty.



- Logon - Displays this authentication record's logon name, or No User Selected when the authentication record is not linked to a user record.

  Note: if you select the red button to remove user credentials, you will be able to make changes to the Logon, Password, and Email address.

- Password/Confirm - Input fields for changing an existing password.

  Tip: By default, passwords must contain at least 6 characters. You can change the default password complexity requirements by editing the Web.config file for the iMIS application.

- Email - When you create a new authentication record, if the iMIS contact record includes an email address, iMIS populates the Create User Logon window with that address. However, the value that is displayed in this area of the Users window is always the value that is stored in the ASP.NET authentication store.

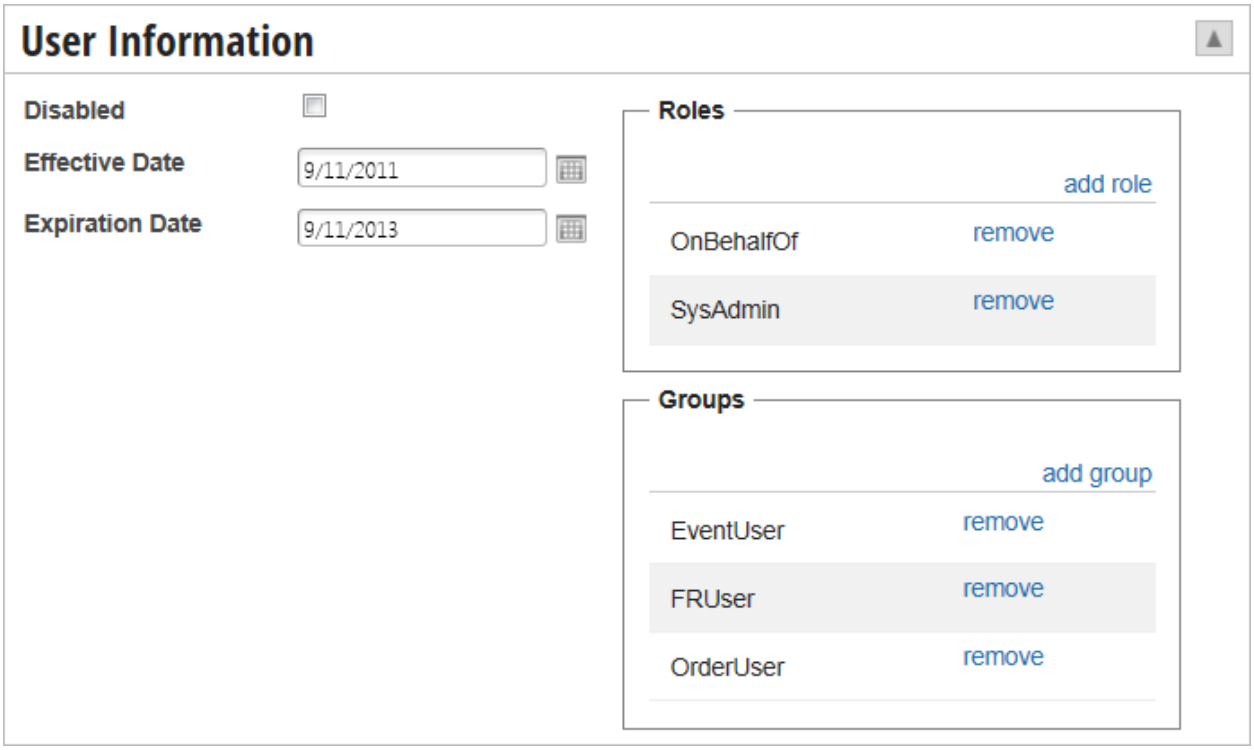
- Locked Out - Indicates whether this authentication record is temporarily blocked from gaining access to iMIS.

Tip: By default, iMIS locks out an authentication record after 5 failed attempts to log on. You can change the default by editing the Web.config file for the iMIS application.

- User Class - Specifies the license (see Types of iMIS licenses and views) to apply to this user, which controls all subsequent authorization.

User Information

Sets membership dates and assigns ASP.NET roles and groups (see "User-level security: Roles and Groups") to the user record.



Caution! Do not remove a user's SysAdmin role without also lowering the Sys Mgmt level (see About authorization levels|topic= About authorization levels (Desktop)): parts of the system that consider them an administrator will conflict with the parts that do not. Make sure they have both or neither.

Roles

Security roles grant specific administrative privileges to user records. For example, one security role might let you use and edit an iMIS definition object in the Document System, while another role might let you use that object but not edit (or even see) its properties.

- CompanyAdministrator
- OnBehalfOf
- SysAdmin

Note: For more information, see Roles.

Groups

The following table describes the security groups that affect user privileges.

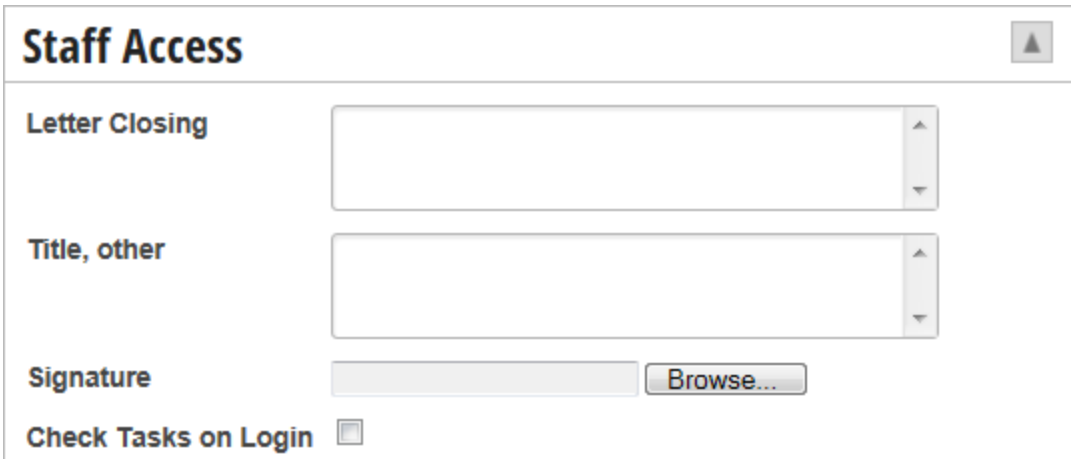
CampaignAdmin	Enables full-control access to the Campaign functionality and its objects
CampaignMgr	Enables read/add/edit/delete access to the Campaign functionality, and read/edit access to its objects
CampaignUser	Enables read-only access to the Campaign functionality and its objects
Certification Admin	Enables full-control access to the Certification functionality and its objects
Certification Manager	Enables read/add/edit/delete access to the Certification functionality, and read/edit access to its objects
Certification User	Enables read-only access to the Certification functionality and its objects
EventUser	Controls security for IQA integration
FRUser	Controls security for IQA integration
OpportunityAdmin	Enables full-control access to Process Manager and its objects
OpportunityCreator	In Process Manager, enables add privileges for projects, and read/edit/delete access to created projects, but read-only access to projects created by others

OpportunityMgr	Enables read/add/edit/delete access to Process Manager, and read/edit access to its objects
OpportunityOwners	Enables addition to a project's Owner or Contact group
OpportunityUser	Enables read-only access to Process Manager and its objects
OrderUser	Controls security for IQA integration
Reporting	Enables access to IQA query links
RFMAdmin	Enables full-control access to the RFM application and its objects
RFMMgr	Enables read/add/edit/delete access to the RFM application, and read/edit access to its objects
RFMUser	Enables read-only access to the RFM functionality and its objects
SegAdmin	Enables full-control access to the Segmentation functionality and its objects
SegMgr	Enables read/add/edit/delete access to the Segmentation functionality, and read/edit access to its objects
SegUser	Enables read-only access to the Segmentation functionality and its objects

Staff Access

Note: By default, this section is collapsed. Simply click on the arrow next to Staff Access to expand this section.

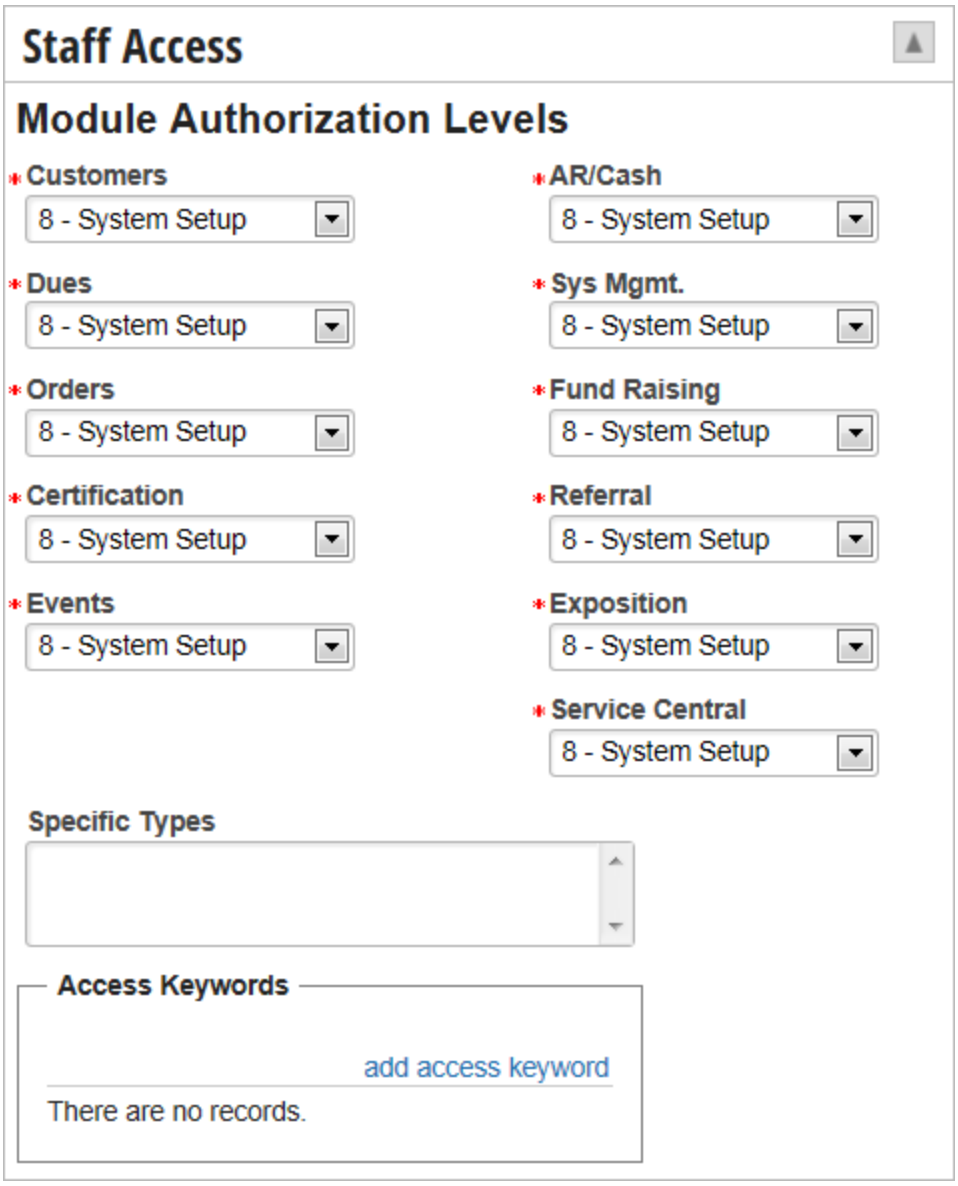
Sets options for iMIS Desktop client users:



- Letter Closing - The text that closes letters sent by the user. For example, Sincerely.
- Title, other - The user's role, to use in letters. For example, Certification Specialist.
- Signature - An image of the user's signature, to use in letters. The image may be in one of the following formats:
- Microsoft Bitmap (BMP)
- Windows Meta File (WMF)
- Graphics Interchange Format (GIF)
- Portable Network Graphics (PNG)
- JPEG Interchange Format (JPG)

  iMIS converts the image into a BMP file before storing it in the database.
- Check Tasks On Login - Displays the user's View activity tasks window when they first log on. When cleared, displays the standard administrative view instead.

  Sets module authorization access (see Access control|topic=Access control: Desktop-only features) for iMIS Desktop and Administrative Console users, which also affects some web client behaviors:



- Specific Types - Controls the customer types that the user can edit in Customers. The types listed in this field can be edited by this user. For example, if you only want the user to be able to edit records with customer type CM, add CM to the Specific Types field. The user will have read-only access to all other records. Separate customer types with spaces or commas.
- Access Keywords - The access keywords that restrict the user from viewing secured windows, tabs, reports, or windows. Separate access keywords with spaces or commas.

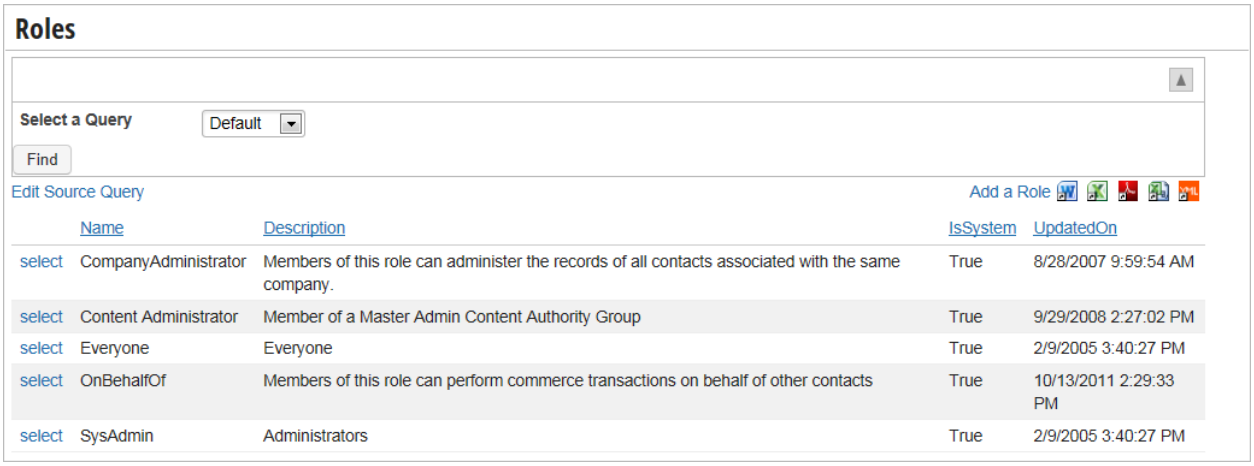
Roles

The Roles window provides options for creating new security roles.

- iMIS uses the Everyone and SysAdmin roles.

  Caution! SysAdmin is linked to Sys Mgmt. authorization (see About authorization levels|topic= About authorization levels (Desktop)):: do not remove one and not the other.

- Applications that integrate with iMIS may use additional roles.



From RiSE, select Security administration > Roles

Enabling CAPTCHA security

iMIS uses CAPTCHAs for security when users create a new account and when users have forgotten their username or password. CAPTCHA is a program that can generate and grade tests that humans can pass but current computer programs cannot. For example, humans can read the distorted text below, but computers can't.

To enable CAPTCHA security

1. Create an account with reCAPTCHA.
2. Follow reCAPTCHA's instructions to create your Public and Private keys.
3. On your production iMIS appserver host, open the web.config files for each iMIS application.

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

4. If you have a license for Web Content Management and have the WCM application installed on one or more external web servers, open the web.config file for the WCM application on each external web server.

- WCM default location: C:\Program Files\ASI\WCM\Net

5. In each web.config file, add the Public and Private keys generated by reCAPTCHA to the values of the following entries:

   <add key="RecaptchaPublicKey" value=""/>

   <add key="RecaptchaPrivateKey" value=""/>

6. Save the files.

   CAPTCHA security is now enabled.

Set up web components

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

Administrators can use Setup web components configuration to customize organization information including labels for the various areas of the site and email and graphics settings.

Quick setup

This window defines basic connection mappings and organization information required to expose the Public view of iMIS for access by anonymous users and Public users.

Go to RiSE > Set up web components > Quick setup:

Note: An iMIS system administrator can change the information that is returned by search queries for both anonymous users and Public users by modifying a Default query.

The full name of the organization that owns the site

Enter the name to appear in the title tag of the front page of your sites.

The abbreviated name of the organization that owns the site

Enter an abbreviated name if desired. You may leave this field blank.

The default email address for the site

Enter the email address to receive all email by default when errors occur with the site. Typically this email address is for the webmaster and the primary contact for the organization.

The default Customer Type to use when creating new customers online

(Required) Specifies the default Member Type to use when creating a new iMIS contact record for anonymous users who register themselves through the web views of iMIS.

The default Customer Type to use when creating new organizations online

Specifies the default Member Type to use when creating a new iMIS contact record for non-individual entities. This relates to creating non-individual accounts in the Web view (see "Creating non-individual accounts in Web view"), for Full and Casual users to enter new accounts.

General configuration window

This window defines variables that affect the handling of alternative currencies, and which control the title and contents of site-wide error windows.

Go to RiSE > Set up web components > General configuration:

Set the Systems Base Currency Code

Specifies the default ISO 4127 currency code (and corresponding pricing) that appears in commerce-oriented windows of the Public view of iMIS.

The control is a drop-down list of ISO 4127 currency codes. When users select an alternative currency code that is different from the base currency code, the system uses values from the Iso_Currency_Codes table and the Exchange_Rate table to calculate exchange rates and display the pricing in the user's chosen currency.

To update these two tables with current exchange rate information, an SQL script called insert_Exchange_Rate_and_Iso_Currency_Codes_values.sql, and instructions for running the script, is available from the Downloads area of the ASI Technical Support site.

Display Alternative Currency

Enables the display of a user-selectable alternative currency control in commerce-oriented windows. When cleared, no alternative currency control is available, and all prices are displayed according to the base currency code.

Credit card prefix

Specifies the prefix used in a cash account Code (AR/Cash > Set up tables > Cash accounts) to denote cash accounts that are used specifically for web-based credit/debit card transactions.

- iPart-based websites: Only cash accounts that contain this prefix value are visible for public (non-staff) users. All other cash accounts are visible for staff users.

  The cash account's Title field determines what is displayed in drop-down lists that enable users to specify a credit card type. For example, if your Credit Card Prefix defined in this window is "W_", and you define a cash account in AR/Cash with W_VISA specified for the Code field and Visa specified for the Title field, then public users would see Visa in the drop-down list when choosing a credit card type for their checkout transaction.

  Note: In a new installation of iMIS there are no default web-based cash account Codes. You must use AR/Cash to define web-based cash accounts, and the Code used for each of those web-based cash accounts must use the prefix defined here in this field.

  Message used when logon is required

  Specifies the message that will be displayed when a user is required to authenticate and log on to the account.

  Message for attempts to access unauthorized pages

  Specifies the message that will be displayed if a user navigates to an area of the website that requires more security clearance.

Generic message for checkout errors

Specifies the message that will be displayed if an error occurs during the transaction process.

Message for in invalid iMIS license

Specifies the message that will be displayed if the user does not have the appropriate iMIS licensure.

Generic error message

Specifies the message that will be displayed if the error does not fall into the category of unauthorized access, checkout errors, or invalid licenses.

Set up content management global properties

Go to RiSE > Set up content management:

Review the following setup pages, modifying the default values as desired:

- Quick setup
- Site designer configuration
- Content designer configuration
- Search configuration
- Workflow configuration

Note: In the Workflow configuration window, be sure to change the default values of the ND.ExpirationEmailFromAddr and CM.ExpirationEmailFromAddr fields to the email address of a person in your organization.

Troubleshooting

- You must be a member of the iMIS SysAdmin security role to access the Set up content management features.

Tools Console

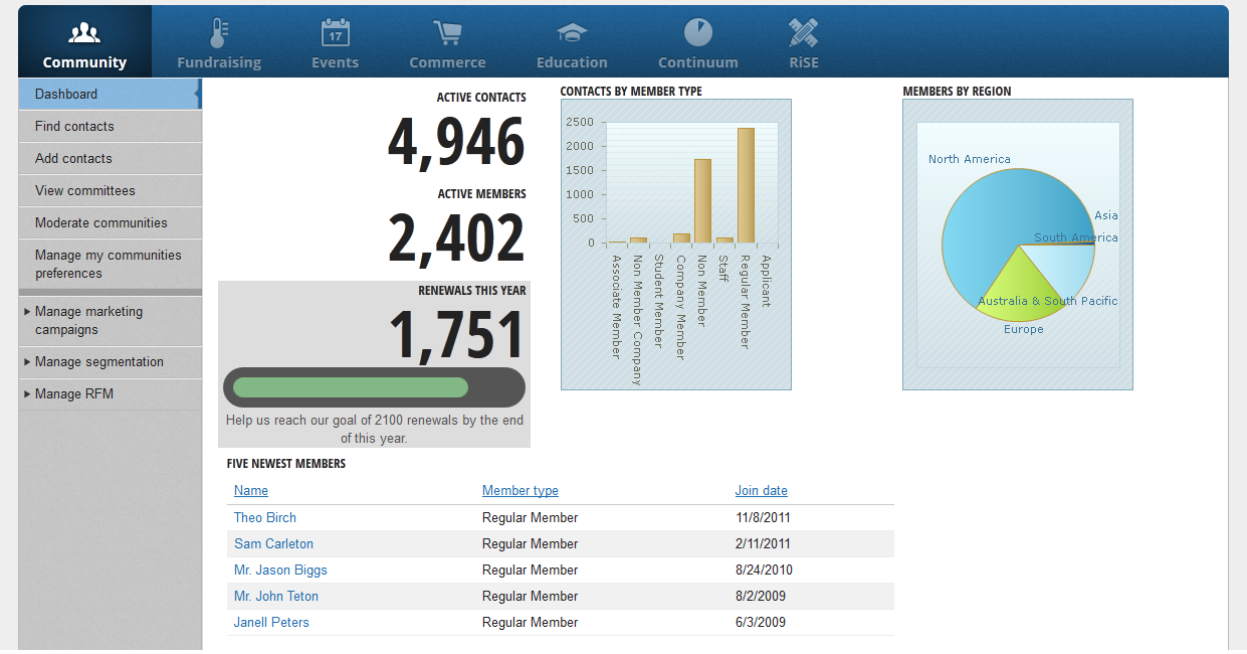
Your Administrative Console includes a Tools tab, which presents quick access to the tools that your staff need most frequently in order to maintain your websites, including Reports and Site Designer.

Note: Several of the topics listed below will redirect you to the web-based RiSE tools. If you would like to continue browsing this page, consider exploring the topics by right-clicking and opening in a new window or tab.

Reports	Site Designer
Reports|topic=Continuum - Reporting	Manage sitemaps|topic=Defining sitemaps (navigation items)
	Manage websites|topic=Managing websites
	Manage shortcuts|topic=Defining shortcut URLs

Using the iMIS Staff Site

The Staff site is a core site available with iMIS 20. The site offers your staff members an easy, convenient way to manage your organization's business from a browser. In addition, utilizing the powerful security features of iMIS organizations can control which areas and content staff can access.



Community

From the Staff site, Community offers a quick-view of up-to-date contact and membership figures that are important to your organization. You can also find and add contacts, view and moderate communities, manage your community preferences, as well as manage segmentation and RFM.

Fundraising

Fundraising via the Staff site offers an easy-to-read overview of fundraising activities for present and past years; as well as figures on new donors via Acquisitions. Fundraising also offers Rapid Gift Entry, Donations, Friendraising, and Gift Aid and Standing Orders (UK).

Events

From your Staff site, Events offers a quick-view Dashboard of your organization's event progress and figures. In addition, organizations create events, define registration options and event pricing, add program items, allow itinerary changes, and can also choose to allow itinerary changes and registrations 'on behalf of' other users.

Commerce

From the Staff site, Commerce offers a quick-view, up-to-date look at key product revenue for your organization. In addition, organizations are easily able to add and edit products, bill membership dues, arrange confirmation e-mails, and more.

Continuum – Reporting

For organization's reporting needs, including Commerce, Contacts, Fundraising, Campaigns, RFM, Segmentation, Content, Process Manager, and a Guided Performance Scorecard (GPS). In addition, with Continuum's standard executive dashboard, organizations can monitor the performance of membership, fundraising, events, financials, and other program areas.

RiSE

The cloud-based web engagement platform of iMIS 20 is self-service driven with multiple theme-based, Quick Start websites. These allow organizations to launch quickly, tailor, and create beautiful and functional new sites. RiSE includes powerful tools such as Site Designer, iMIS Dynamic Content, Page Builder, and Content Gallery.

Web component setup (Public view)

Where to set up Public view page options

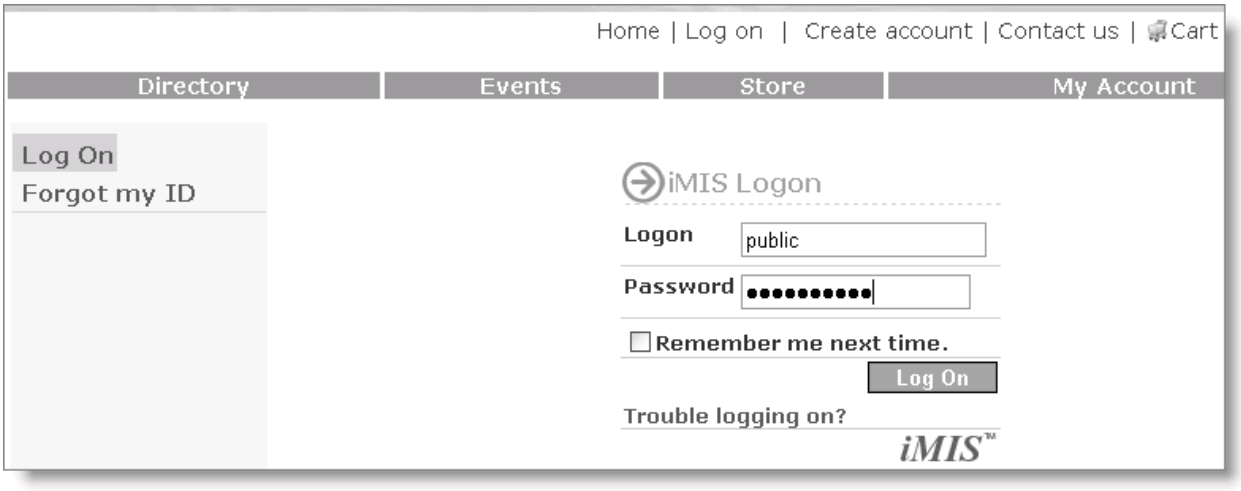
Because there are so many configuration pages in System Setup that control the Public view, this section maps specific pages in the Public view to the many configuration pages that affect them.

Use the tables below to locate the System Setup areas that control the Public view pages you want to change.

Note: Tip: Keep in mind that when Full users access the Public view, they see what a Public user sees.

Note: Note: Changes you make here affect not only the Public view of iMIS, but also all WCM websites that use standard pages to add functionality normally found in the Public view.

Configuring Public view - Log on



To customize this area of the public view, go to System Setup and choose the menu items indicated for each public page.

Log On	• General configuration • Organization configuration • SSL configuration • Misc label configuration	• Logon configuration
Forgot my ID	• Organization configuration • Misc label configuration	• Forgot logon or password configuration • Reset password configuration
Contact us	• Contact us configuration • Organization configuration • Misc label configuration	(none)

Note: Note: To allow contacts to pay their bills (dues, subscriptions) on this site, you must use Cash billing.

Configuring Public view - Directory

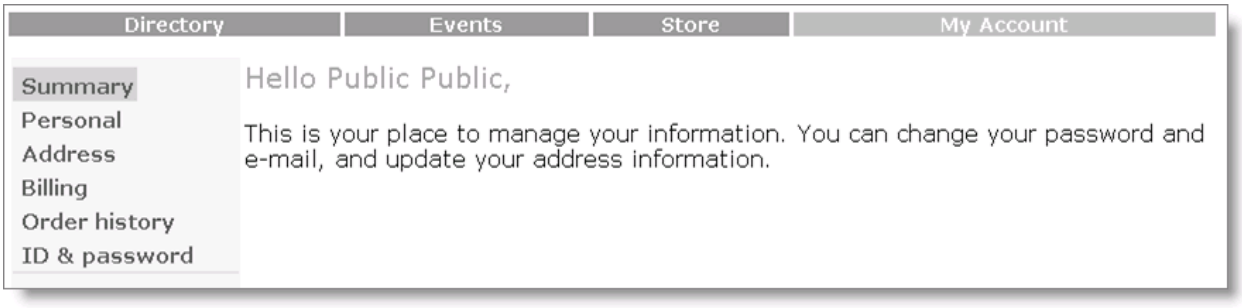
To customize this area of the public view, go to System Setup and choose the menu items indicated for each public page:

Directory	• Misc label configuration	(none)
Committees	• Misc label configuration	• Committee configuration

To customize queries for the Directory and Committees areas of the Public view

Goal	\ContactManagement \DefaultSystem\ Queries	Area seen
To control which contact records display in the Directory	...\Directory \Contacts	Public view Directory > Directory Web view Directory > Find Contact
To control which contact records display	...\Contacts	Web view Contacts
To control which committees display	...\Directory \Committees	Directory > Committees
To control which committee members display	...\Directory \Committees \Members	Contacts > Committees and then select a committee

Configuring Public view - My Account



To customize this area of the public view, go to System Setup and choose the menu items indicated for each public page:

Create account	• Organization configuration	• Create account configuration • Create account page titles

		• Create account settings • User defined fields • Create account search
Summary	(none)	• Account management configuration
Personal	• Personal label configuration	• Personal information configuration • User defined fields
Address	• Address label configuration	• Address configuration
Billing	(none)	(none)
Order history	(none)	(none)
ID & password	• Misc label configuration	(none)

Note: Note: You must populate the prefix and suffix gen_table data in the Expansion field in order to see data in the Prefix or Suffix drop-down lists in the Public view.

Configuring Public view - Events

To customize this area of the public view, go to System Setup and choose the menu items indicated for each public page:

Note: Note: The Event list and Event search pages can be configured to list any type of event. Access the Public queries from the Document system (EventManagement > DefaultSystem > Queries). The EventList and EventSearch folders contain the Public view queries that can be modified to filter on event Type. The event type cannot be filtered on the Event calendar.

Event List	• Misc label configuration	• Event setup • Events configuration
Calendar	(none)	(none)
Search	(none)	(none)
Add to Calendar	• Organization configuration • Exchange settings	(none)

Configuring Public view - Store

To customize this area of the public view, go to System Setup and choose the menu items indicated for each public page:

Browse Categories	• Image configuration • Product label configuration	• Store home • Store configuration

		• Manage product attributes • Manage master products
Search	(none)	(none)
Cart	• General configuration • SSL configuration • Payment label configuration	• Checkout configuration • Credit card label configuration • Cart manager • Billing configuration

Configuring Public contacts

Opening the Directory to anonymous access

By default, no unauthenticated site visitor who browses the Public view can see and use the directory. If this conflicts with your business needs, you can expose this information using .NET security: you can remove the authorization code that denies anonymous users all access to the directory.aspx page.

To open the directory to anonymous access, edit the web.config file found in iMIS_Public core folder (default: C:\Program Files\ASI\iMIS\iMIS_public\Core). From your <configuration> section, modify the <deny users="?"/> to be changed to <allow users="?"/>:

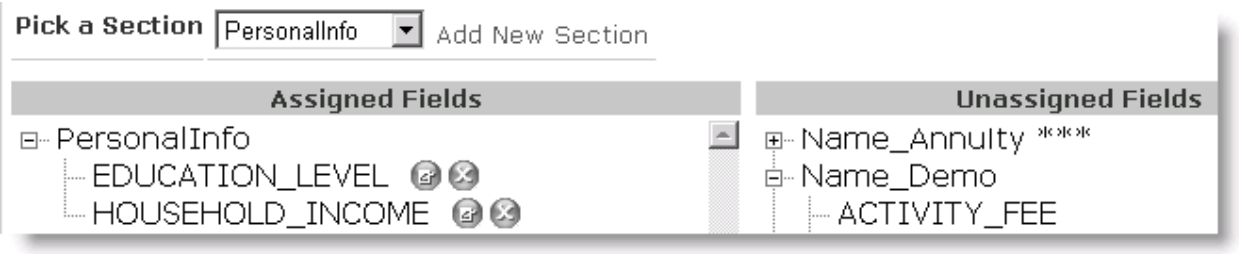
```
<configuration>
<appSettings/>
<connectionStrings/>
<system.web>
<pages autoEventWireup="true">
</pages>
</system.web>
<location path="directory.aspx">
```

```
<system.web>
<authorization>
<deny users="?"/>
</authorization>
</system.web>
</location>
</configuration>
```

> **Note:** Note: The default IQA query for the directory page ($/ContactManagement/DefaultSystem/Queries/Directory/Contacts/Default) is set to “Authenticated Users Full Control”. Change the security to “Everyone Full Control” or “Everyone Read.” So that the directory search will show unauthenticated users.

Adding user-defined fields in Public view

The user defined fields (UDF) setup page is part of the Customer administrative section.



From System Setup, Select Set up customer web components > User defined fields

To add fields to a page

The unassigned UDFs appear in a tree format by the table name. All unassigned UDF are listed in the Unassigned Fields section on the right. All UDFs assigned to a page are listed in the Assigned Fields section on the left in a tree format under the page name.

1. Choose a page by making a selection in the Pick a Section drop-down.

Once you add a field, it immediately appears on the page you have selected in the Contact Management list.

Note: By default, administrators can assign fields to the Create Account page or to the PersonalInfo page. You can also place an item in the User defined fields page by creating a new section.

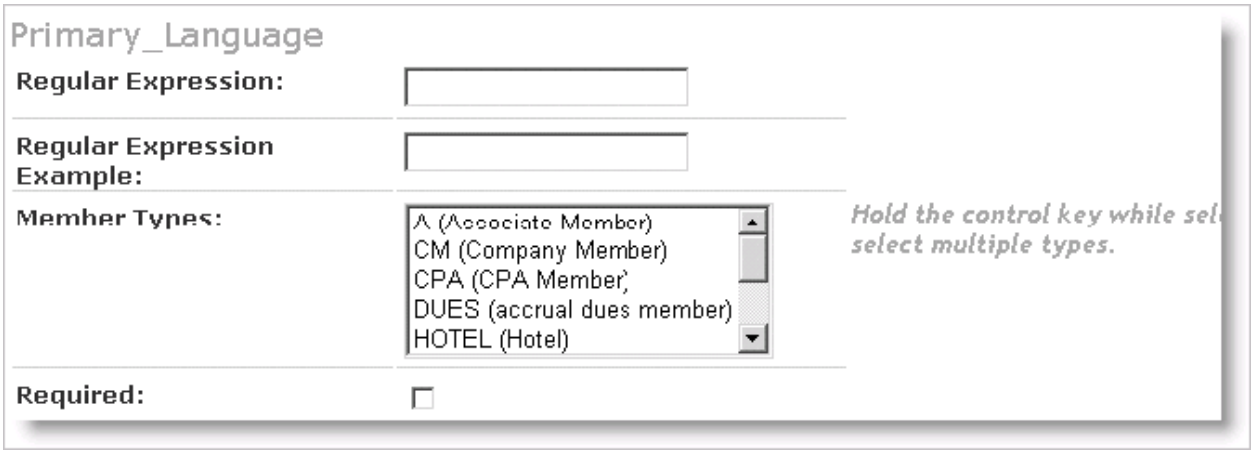
2. (Optional) Click the Add New Section link on the user-defined setup screen to add a new item on the User defined fields page. Once an item has been saved, it immediately appears in the User defined fields page in the Contact Management list.

   Note: To enable the User defined fields page in the Public view, you must edit the iMIS site map for the Public view in the C:\Program Files\ASI\iMIS\iMIS_public\web.sitemap file to uncomment the line with the siteMapNode title="User defined fields". Once you enable this line, Public users can then view the new section's UD fields in the Public view.

3. Add a UDF to the page by dragging any unassigned fields from the right side onto the name of the page on the left side.

   To set UDF properties

   Set properties on the user defined field by clicking the Edit icon next to the field name in the assigned fields list. The Setup page displays the properties of the field.



   From System Setup > select Set up customer web components > User defined fields and click the Edit icon next to a field name in the Assigned Fields list

Regular Expression field - Administrators can force that data be entered in a specific format by entering in a regular expression. For example, if the field is a phone number field, then an administrator can enter in an appropriate regular expression here to for users to follow a specific phone number format before they can proceed.

> **Note:** Note: Public view will not validate that the regular expression is correct and administrators must be sure of their regex formula before entering it here.

Regular Expression Example field - The text entered into this field will appear when a user types in information that doesn't properly validate against the regular expression. It guides the user in formatting the value. Example: Enter your mobile phone number in this format: (555) 555-1212.

Required option - Each UDF can be set up so that is required for a user.

Creating user defined fields for Public view in iMIS Desktop

The Public view administrators can setup user defined fields and pages in the User defined fields page (System Setup > Setup customer web components > User defined fields).

- You can add user defined fields to the Personal information page within account management and to the Create account page of the create account process.
- You can add user defined fields that have not been assigned to a page in Public view to the User defined fields page.

  Note: A user defined field must be assigned to a window before it can be used on a Public view page.

  Setup in iMIS Desktop

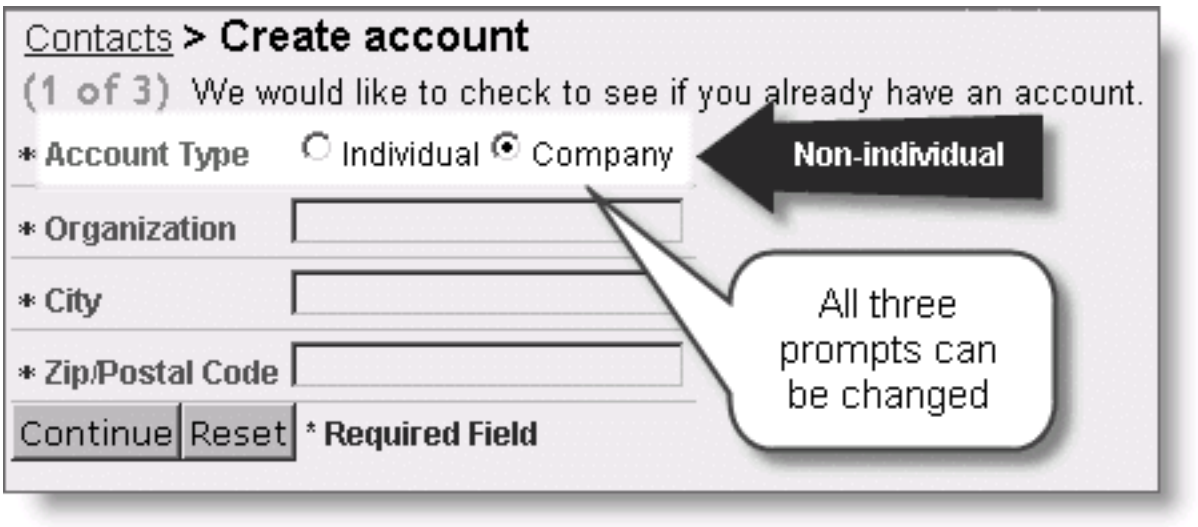
  Before using this feature in Public view you must perform the setup of user defined fields in iMIS Desktop (Customers > Set up module > General > Additional Windows > Define Tables).

> **Note:** Note: The Public view does not support multiple instances.

Creating non-individual accounts in Web view

To help distribute workload throughout organizations, iMIS allows both Full and Casual users in the Web view to create accounts for non-individual records. In System Setup, you can configure the prompt for "non-individual" to best suit the needs of the organization.

When creating these accounts, users can choose whether to create an individual or a non-individual (company):



When users choose to create a non-individual account, iMIS changes which fields appear during account creation. Because these accounts are not for individuals, no confirmation emails are sent.

Duplicate checking: Account creation prompts users to search for existing records to prevent creation of duplicates. When duplicate-checking for non-individuals, the Organization (name) field uses a CONTAINS search (versus BEGINS WITH) with an 80 character limit. Likewise, when searching for a Parent Organization, the Organization (name) criteria also has an 80 character limit and uses a CONTAINS search.

Company flowdown: When users select a Parent Organization to associate with the new account, they are prompted to overwrite (flow down) information from that organization. Whether the address flows down is controlled by the setting Customer > Module setup > Advanced, Disable Auto Flow Down of company address Information.

Label configuration: Several prompts for this feature can be configured under System Setup:

- Set up web components
- Quick setup
- The default Customer Type to use when creating new organizations online
- Set up customer web components
- Create account configuration
- Account Type Label (AccountTypeLabel)
- Individual Label (IndividualLabel)
- Non-Individual Label (NonIndividualLabel)
- Create account search
- Title of the Company Search page for individuals (CompanySearchMessage)
- Title of the Company Search page for non-individuals (CompanySearchMessageNonInd)
- Text of the link which allows company selection to be skipped (CompanySearchSkipText)

Configuring Public events

Setting up the system for Public events

Complete the following items in System Setup before creating an event for the Public view.

To prepare for Public events

- Make sure the codes contain only letters, numbers, or an underscore – no special characters.
- Resolve any database issues identified by Public view "pre-queries" prior to implementing Public view.

- Set up the PayPal and internet merchant accounts.
- Set up the SSL certificate for secure processing.

Setting up Customers for Public events

Prepare your customer data before creating an event for the Public view.

To prepare customer data

1. Purge duplicate records.
2. Consider whether individual records have unique e-mail addresses or group e-mail addresses, such as info@company.com, where the event messages may not get to the right person.
3. Consider that each company record has to have a first name and last name in the record, and ensure that the names make sense in the context of sending event registration notices.

Setting up registration for Public events

Keep these tips in mind:

- Use the Registrant Class Determination option in the Set up Event wizard to specify which registrant classes require fees.
- The Public view does not support default pricing. Pricing must be defined for each registrant class.
- HTML codes entered in fields to format display will print on iMIS reports that include those fields.
- Using the ViewAll queries, you can configure Event search and Event list pages to list any type of event for Casual and Full users. To filter event types, access these queries from the Document system: EventManagement > DefaultSystem > Queries.

To set up an event for Public registration

1. Create the event and functions in Desktop view (Events > Define an event).

2. Select the Show this event/function on the Web? and the Allow online registration via the Web options for each event and function to be accessed in Public view.

   Note: Complete pricing and event definition before making the event available for Public and setting the status to “A” (Active); otherwise, users might register before pricing is set.

3. Save the event and functions.
4. Use the Set up Event wizard to configure the event's online components.

   Tip: For help with the wizard, see Web setup wizard for events in Events Administration.

   Troubleshooting

   You must populate the Default Terms Code field in AR/Cash > Set up module > Aging with a value. If not, Events functions do not appear when users register on the Public view. You may also see the following error in the Error log: "COrder.TermsCode: The supplied value '0' is not defined in the Financial Terms reference table."

Setting up guest registration

You can structure guest registrations to:

- Allow the user to add guests without additional charges and badge requirements
- Specify fees and/or badge information for guests

To allow users to add guests without fees or separate badge requirements

1. In the iMIS Desktop Event Function Detail window (Events > Define an event> Define a function), make sure the Show on Web option is selected and the Guest Function option is not selected.
2. In the Max Registrations per Registrant field, enter the maximum registrants allowed or an arbitrary large number if there are no limits. An empty or zero amount defaults to one maximum registrant.
3. Click Save.

   The main registrant's name will print on all badges.

   To specify fees and/or badge information for guests

1. In the iMIS Desktop Event Function Detail window (Events > Define an event > Define a function), enable the Guest Function option. The function will not display unless a guest is added during registration.
2. (optional) Use the Web Event Setup Wizard to specify the fees for the function.
3. (optional) Use the Web Event Setup Wizard to specify the required/enabled badge data fields to be included on guest badges.

Example: Specifying complex guest registration rules

In the following example, many registration options are presented to the user.

For the AABA conference, each registrant can register one spouse/significant other and up to six children. The spouse/significant other has the choice of two levels of participation/registration. Optional workshops and social functions can be purchased for any number of guests.

Main registration

1. In the iMIS Desktop Define an event page (Events > Define an event), enter the overall event registration fee.
2. Enter 1 for Max Registrations per Registrant.

Spouse/Significant other registration

The two levels of participation available for a registrant's spouse/significant other are:

- Conference package (150.00)
- Program and tours package (96.00)

The maximum number of registrants allowed is one.

1. In the iMIS Desktop Event Function Detail window (Events > Define an event > Define a function), define each package.
2. Select the Guest Function option.
3. Enter 1 for Max Registrations per Registrant.

4. (optional) Enter a Conflict Code or, if conflict codes have been defined, select the lookup icon to search for the code to ensure that only one package is selected.
5. (optional) In the Web Event Setup wizard, click More > Badges and define the enabled/required fields for guest badge information.

   Child registration

   The two registrations available for a registrant's children are:

- Conference Camp: age 3 to 11 years (250.00)
- Teen Scene: age 12 to 17 years (235.00)

   The maximum number of registrants allowed is six.

1. In the iMIS Desktop Event Function Detail window (Events > Define an event > Define a function), define each function.
2. Select the Guest Function option.
3. Enter 6 for Max Registrations per Registrant.
4. (optional) Enter a Conflict Code or, if conflict codes have been defined, select the lookup icon to search for the code to ensure that only one function is selected for each child.
5. (optional) In the Web Event Setup wizard, click More > Badges and define the enabled/required fields for guest badge information.

   Optional workshops and social functions

   The main registrant may register for pre-conference workshops:

- One-day certification program: Cannot enroll for any other workshops due to schedule conflicts. (295.00)
- Project management: half-day (195.00)
- Roundtable: New Technology (2 hours, 50.00)
- Roundtable: Team Building Ideas (2 hours, 50.00)
- Roundtable: Industry Update (2 hours, 50.00)

The maximum number of registrants allowed is one.

1. In the iMIS Desktop Event Function Detail window (Events > Define an event > Define a function), define each workshop.
2. Enter 1 for Max Registrations per Registrant.
3. (optional) Enter a Conflict Code or, if conflict codes have been defined, select the lookup icon to search for the code to ensure that there are no scheduling conflicts.
4. (optional) In the Event Web Setup wizard, click More > Badges and define the enabled/required fields for guest badge information.

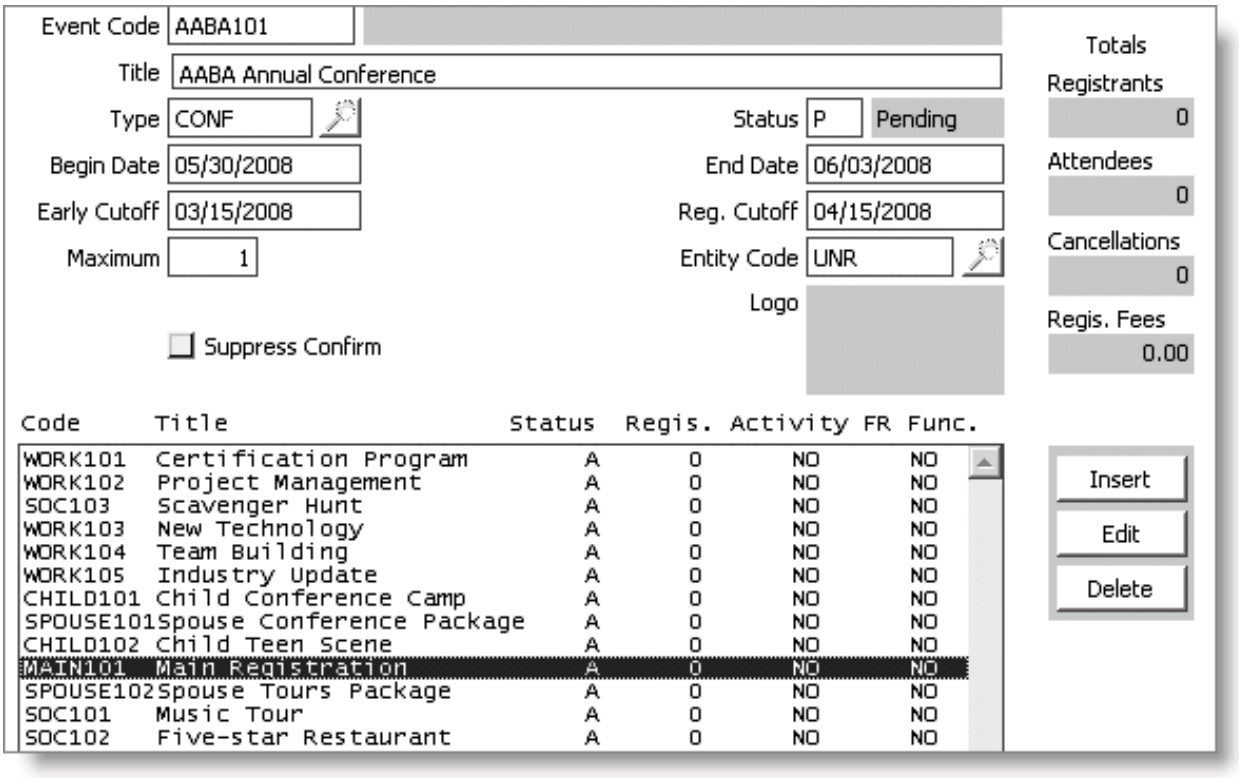
The registrant and any number of guests may register for optional social functions:

- Music tour: Tuesday afternoon (40.00)
- Five-star restaurant: Wednesday night (80.00 Members, 100.00 Non-members)
- Scavenger hunt: Friday afternoon (25.00)

Fees are assessed for each guest. There is no maximum number of registrants.

1. In the iMIS Desktop Event Function Detail window (Events > Define an event > Define a function), define each social function.
2. Select the Guest Function option.
3. Enter a large arbitrary number for Max Registrations per Registrant so that there is no reasonable limit on registrations.

Your event summary may look similar to this example:



Example event with complex guest registration rules

Configuring Public commerce

Note: Note: Web-based shopping carts need to persist cardholder data during the shopping and checkout processes, so iMIS always encrypts such temporary data to protect the cardholder. This encryption occurs even if you do not implement advanced PCI compliance (see "Implementing Advanced PCI Compliance options").

Creating new categories

You can perform the following tasks from the Orders Setup page.

- Create categories and subcategories
- Nest subcategories within existing categories

- Edit categories
- Delete categories

To create new categories

1. Go to System Setup > Setup commerce web components > Store home.
2. In the Category section at the top left of the Orders Setup page, click Store Home.
3. Expand the category list under Store Home until you can select the category under which you want to place a new category.

   The selected category should appear should appear in bold font.
4. Click New.
5. Enter a category, title, and description on the Create A New Category section of the page.
6. Enable Visible Online to make the category visible to users.
7. Click Add Category.

   If the category creation process was successful, the new category should appear beneath Store Home.

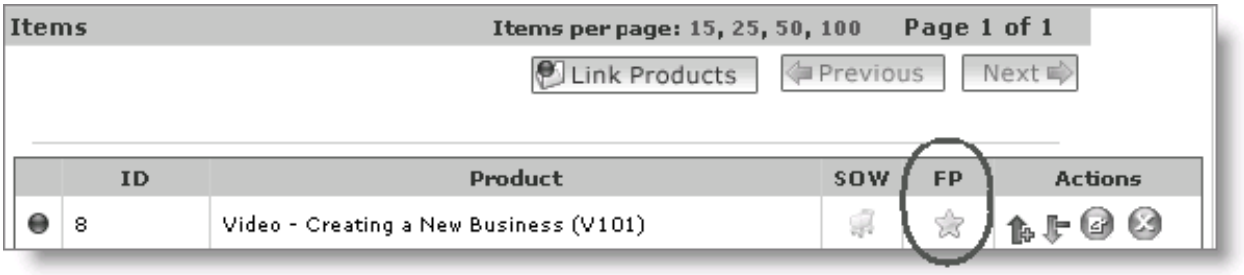
Store Home page layout

The Store Home page on the Public view displays product categories and featured products. The arrangement of the featured products and product categories are setup on the Orders Setup page (System Setup > Set up commerce web components > Store home > Orders Setup).

- Product Categories – You can arrange the products in categories using this setup page by creating categories and linking the products to categories. Product categories help the public user to browse the products quickly in an organized format.
- Products – Linking products with categories places them in separate categories on the Store Home page in the Public view.

- Featured Products - Featured products under the Store Home category appear on the Store Home page when it is first displayed. The Featured Product icon is the yellow star under FP column. Clicking on the icon turns it gold and changes it's status to featured product.

> **Note:** Note: The products under the Store Home column are a special category of featured products. The Store Home category is created and named by default. Designating products as featured products under this category gives them prominence by placing the products on the Store Home page in the Public view. Products under this category must be set as featured products using the Featured product icon on the Order Setup window, otherwise they will not appear on the Store Home page in the Public view.



Featured product icon on the Orders Setup page

Store Home page with Featured Product

Linking products to categories

A product will not appear on the Public view until at least one of the following requirements are met:

- The product is linked to a category.
- The product is listed as a featured product. It will appear only on a featured products page and on the Store Home page (System Setup > Set up commerce web components > Store home).

  Note: To enable a product to appear as a featured product under the Store Home column on the Public view Store home page, you must select it as a featured product by clicking on the Featured Product icon in the product list.
- The product is added to a cross-sell list. It will appear only as a recommendation after another product has been added to the cart.

To link a product to a category

1. Select parent category for the linked products.
2. Click Link Products.
3. From the list of available products, select a product.

   Note: You can adjust the number of items (15, 25, 50 or 100) to view per page.
4. Link individual products by clicking Add icon.

   The product will be associated with the category and removed from the list of available products.
5. To save changes, click Exit Linking Process.

Category details

On the Orders Setup page, (System Setup > Set up commerce web components > Store home) there are 6 columns:

- Product type
- ID
- Product
- SOW
- FP
- Actions

  Column 1 (Product Type)

  The red or blue dot in Column 1 (leftmost column) represent a product's status in the Public view database. Blue dots mean that the product was entered into iMIS as a normal product.

  Public view allows administrators to offer master products. Master products will have a red dot in the leftmost column.

  Column 2 (ID number)

  Each product entered into the Public view database is assigned a unique identifier. These ID numbers assist in location in the product table. ID numbers are listed in Column 2.

  Column 3 (Product)

  The product title is located in Column 3.

  Column 4 (SOW-Sell on Web)

  Some administrators may not want a product to be available for sale online at the time of entry into the database. Column 4 offers three options concerning a product's viewing status:

- Sell on Web
- Show on Web
- None

If an administrator clicks the icon in Column 4, these options will appear with “cancel” as a fourth choice.

Column 5 (FP-Featured Product)

Each category in Public view Store may have any number of Featured Products. A featured product will be highlighted on a category's main page.

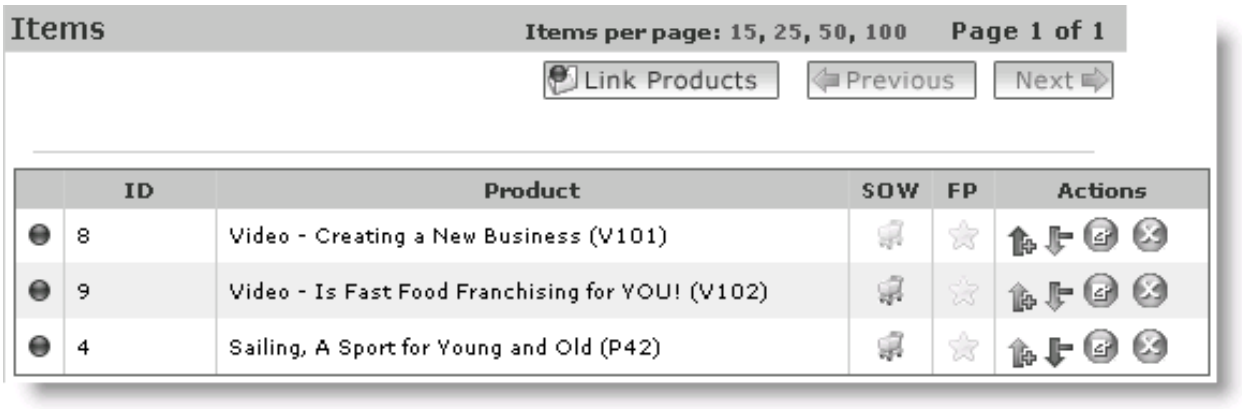
Every product listed possesses a small yellow star icon. To make an item a featured product, click the Featured Product yellow star icon. (It should be dark gold, not light-yellow).

> **Note:** Note: Clicking the Featured Product icon is required for products in the Home Page category. If a product is in the Home Page category, clicking the Featured Product icon will place the product under the Home Page column on the Store Home page in Public view. Otherwise, the product will not appear on the web page.

Column 6 (Product Management Actions)

Actions has four icons.

- Arrow Up moves the item up the list. (The up and down arrows will determine the order in which items are viewed by users.)
- Arrow Down moves the item down the list.
- Edit allows an administrator to edit the product. Clicking edit takes an administrator to a page where detailed information about the product can be modified.
- Delete removes a product from the category's list. This will not delete the item as it appears in Public view Orders.



Customizing product details for the Public view

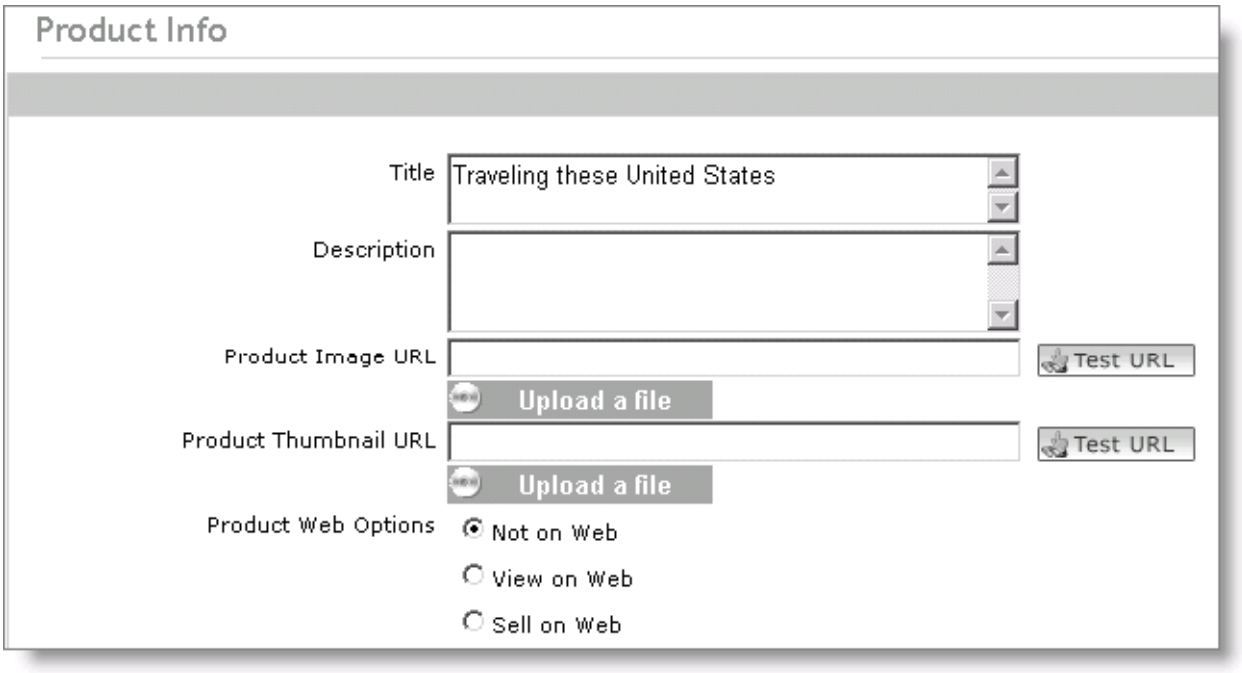
You can make changes to the display of iMIS products on the Public view from Store home > Product info. These are products that were created on iMIS Desktop.

To edit product details

1. Go to Store home.
2. Expand categories in the column.
3. Select a product category.

   The list of linked products is displayed.
4. Click the Edit icon next to the product.
5. On the Product Info page make your modifications.

   Note: Place key search terms within the first 300 characters of the description. In the Public view, search truncates the description to 300 characters, so only text within that range yields search results for users.
6. Click Next to select Cross-Sell products from the Cross-Sell Products page.
7. Click Finish to return to the Orders Setup page.



Prompts that cannot be customized on Order summary Page

The following prompts cannot be customized in the Order Summary pages.

- Order Summary - OrderSummaryPageTitleLabel
- Error messages:
- OrderSummaryPageExpiredErrorLabel
- OrderSummaryEmailErrorLabel
- OrderSummaryEventsErrorLabel
- OrderSummaryProductsErrorLabel, OrderSummaryDuesErrorLabel

The following prompts cannot be customized on the Orders Summary page.

- Order Date - OrderSummaryOrderDateLabel
- Total Payment - OrderSummaryOrderTotalLabel
- Order Number - OrderSummaryOrderNumberLabel
- Quantity - ProductQuantityLabel

- Price - ProductPriceLabel
- Product - ProductLabel
- Shipping Address - ShippingAddressLabel
- Shipping Method - ShippingMethodLabel
- Shipping and Handling - ShippingHandlingLabel
- Tax - TaxLabel
- Sub Total - TotalLabel

Creating attributes for master products

Attributes help users view all of the distinguishing qualities of iMIS products grouped under one master product. You assign attributes to child products with codes.

- The attribute code is used only in the Public view as a way of distinguishing between similar attributes. Shoppers will never view this code.
- New attributes may only be created before child products are added. To create a new attribute after adding child products, you must remove every product/attribute association and add the attributes again.
- You cannot assign more than one child product the same set of attributes.
- Codes are established to differentiate when assigning attributes.

To create a new attribute

1. On the Manage product attributes page, select Add Attribute (System Setup > Set up commerce web components > Manage product attributes).
2. Select the Define New Attribute link located beneath the drop-down menu.
3. Click Add Attribute.

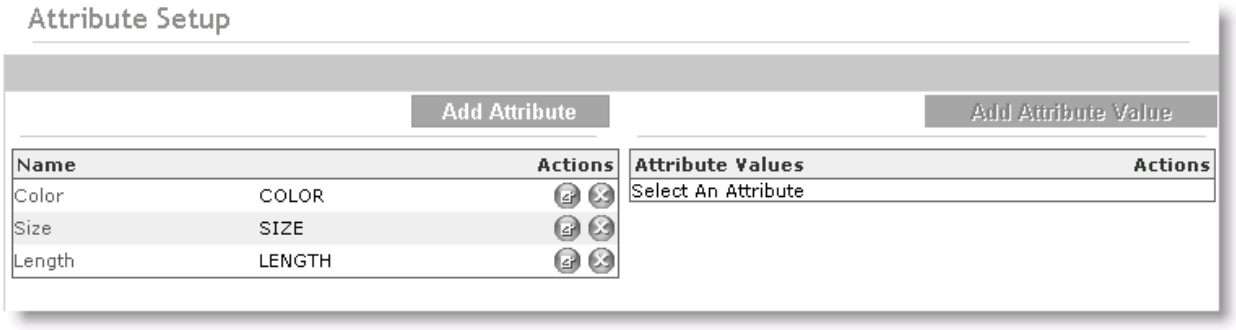
- Enter the new attribute title.
- This title will be displayed to users in a drop-down menu (For example, Size).

- Enter the attribute code.
- Enter a description.

  Viewers will not see the description; it is viewed by the administrator in the Product manager.

4. Click Add.

   The new attribute is displayed the list of attributes.



Changing attributes for master products

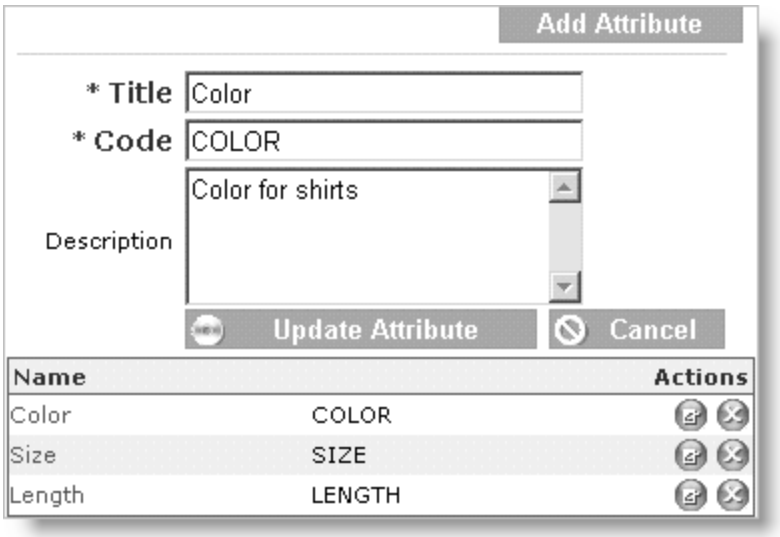
You can go back to add or delete attributes even after you have created the master product.

To change attribute title, code, or description

1. On the Manager product attributes page, select an attribute (System Setup > Set up commerce web components > Manage product attributes).
2. Click the Edit icon located in the Actions column at attribute setup.

   Note: Clicking Edit will not allow an administrator to add values to attributes.

3. Edit the attribute's title, code, and description.
4. Click Update Attribute to save changes.



Adding values to master product attributes

Clicking Edit in the Actions column at attribute setup does not allow you to add values to attributes; use the Add Attribute Value command.

To add values to attributes

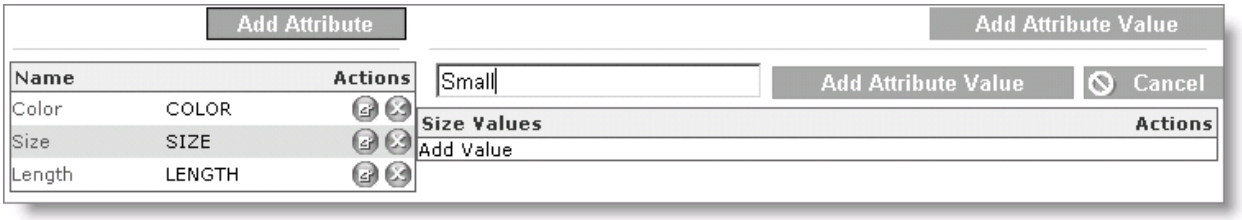
1. On the Manager product attributes page, click Add Attribute (System Setup > Set up commerce web components > Manage product attributes).

   The Attribute Setup page is displayed.

2. Click Add Attribute Value.

- Enter the value name.
- Click Add Attribute Value.

The new value should appear at the bottom the list of values at attribute setup.



Renaming the term "cart" on the web

If you need to use a term such as basket instead of cart throughout your iMIS websites, you can do so by modifying these items:

- iMIS navigation labels (requires access and permissions for WCM)
- Labels in the database using a parameter in System Setup
- XML files
- Javascript files
- ASPX files

To change the System Setup navigation labels

See the WCM Reference for information about changing and publishing navigation items. The two navigation items to change are:

- Store > Cart
- System Setup > Set up commerce web components > Cart manager

To change the labels with the label parameter in System Setup

1. Navigate to one of these fields:
   - System Setup > Set up web components > Misc label configuration - Label for shopping cart
   - System Setup > Set up web components > Address label configuration - Cart Item Label
   - System Setup > Set up commerce web components > Checkout configuration - Link for step 1
   - System Setup > Set up events web components > Events configuration - Message displayed when there is an incomplete item in the cart
2. Ensure that the preferred term is used in the field.
3. Click Save.

To change specific XML files

1. On the appserver, go to C:\Program Files\ASI\iMIS\Net\bin\ and locate the files Asi.Business.Commerce.xml and Asi.iBO.xml, and locate C:\Program Files\ASI\iMIS\iMIS_public\web.sitemap, and C:\Program Files\ASI\iMIS\iMIS_ public\Templates\MasterPages\Public.master.
2. Back up each file.
3. Search for the term cart and replace it with your preferred term in the text and title attributes of the files. Do not change the term in the URL attributes. For example, only change the term in the title of this line in web.sitemap:
   <siteMapNode title="Cart" url="~/Core/cart/MyCart.aspx"></siteMapNode>
4. Save the files with the same names as before.

To change specific JavaScript files

1. On the appserver, locate the file C:\Program Files\ASI\iMIS\iMIS_public\Core\Admin\CartManager\CartManager.js.
2. Back up the file.
3. Search for the term cart and replace it with your preferred term for these two confirmation messages:

- Line 32 - var ans = confirm("Are sure you would like to remove all the cart items for this user?");
- Line 56 - var ans = confirm("Are sure you would like to remove this cart item?");

4. Save the files with the same names as before.

To change specific ASPX files

1. On the appserver, locate the file C:\Program Files\ASI\iMIS\iMIS_public\Core\Orders\shoppingcart.aspx.
2. Back up the file.
3. Search for this line and change to your preferred term:

- <asiweb:PanelTemplateControl runat="server" TemplateTitle="Shopping Cart" ID="CartPanel">

4. Save the file with the same name as before.

   Tips

   The following information can be helpful when changing the term cart to another name.

- You do not need to restart the IIS server for any of these changes to take effect.
- While you can change the two left-hand navigation labels under System Setup, you are not changing the field labels themselves.

Master products

Defining master products allows you to sell different versions of a single product from one page in the Public view. For every master product, you can define attributes, add child products, and list cross-sell products.

For example, without a master product, shirts with different attributes are presented individually: small red shirt, medium blue shirt, etc. If you create a master product for all shirts, you can then define attributes so that your customers can go to one page and choose their preferred shirt color and size with a drop-down list.

Every product in the iMIS database can be added as a child product of a master product.

Managing master products

Here are the basic steps for managing master products.

> **Note:** Note: Defining master products and attributes can be done from System Setup or Orders.

1. Add the individual products that will be added later as child products under the master product
   (Orders > Manage inventory > Manage products). For example, add product TSHRTREDL for red shirts, size large. Be sure to mark the product as Show on web. See Manage products window for more information.

2. Add product attribute(s) that will present choices such as color or size without having to view each as a separate product
   (System Setup > Set up commerce web components > Manage product attributes). See Creating attributes for master products for more information.
3. Create a master product to allow a Public view user the ability to view a product and it's attributes on the same page
   (System Setup > Set up commerce web components > Manage master products). See Creating master products for more information.

- Add child products to the master product that represent the virtual group of products that would normally have to be multiple separate and independent products in iMIS. When adding child products, you can choose one to be the default child product that appears first as the Public view user browses the product listing. For example, a red shirt may be the default child product and other colors would be viewed using a drop down menu.
- Choose cross-sell products that might sell with the master product.

4. Link the master product to a category that will appear in the Public view (System Setup > Set up commerce web components > Store home). Master products appear with a red dot to their left. See Linking products to categories for more information.

Creating master products

To create a master product, you combine two or more existing products, which become child products of the master.

To create a master product

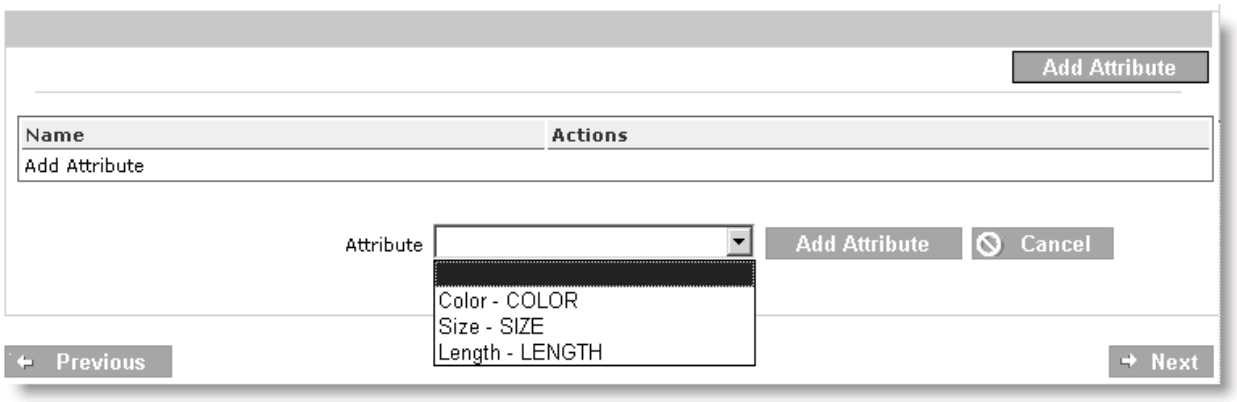
1. On the Manage master products page, click Add master product (System Setup > Set up commerce web components > Manage master products).
2. Enter the product Title, Description, and Product Web Options.
3. Click Next.

   The Edit page is displayed. You are prompted to add attributes to the master product.

4. Click Add Attribute.

You are prompted to choose attributes for the master product. You can select more than one attribute.

- Select an attribute from the drop-down list and click Add Attribute.
- Continue adding attributes as needed.
- When you are done click Next.



5. From the Child products page, click Add Child Product.

   The iMIS Products list is displayed.

- Select an iMIS product from the list.
- Choose the attributes you want the Public view user to choose from.

  You must select an attribute value for each attribute associated with the master product. A child product must have unique attributes. For example, there is only one small red polo shirt associated with the master product.

- Click Save.

  The sub-product appears in the list.

- Continue adding child products as needed and click Next when you are finished.
- Select a default product from the list by clicking the green check mark next to the product in the list.

Note: At least one product must be selected as the default before an administrator will be permitted to continue.

The Cross-Sell page is displayed.

6. Select a cross-sell products from the available products list and click Add.
7. Click Finish.

The list of master products is displayed on the Manager master products page. You can continue creating Master products as needed.

Adding attributes to master products

You can add attributes after you have created a master product.

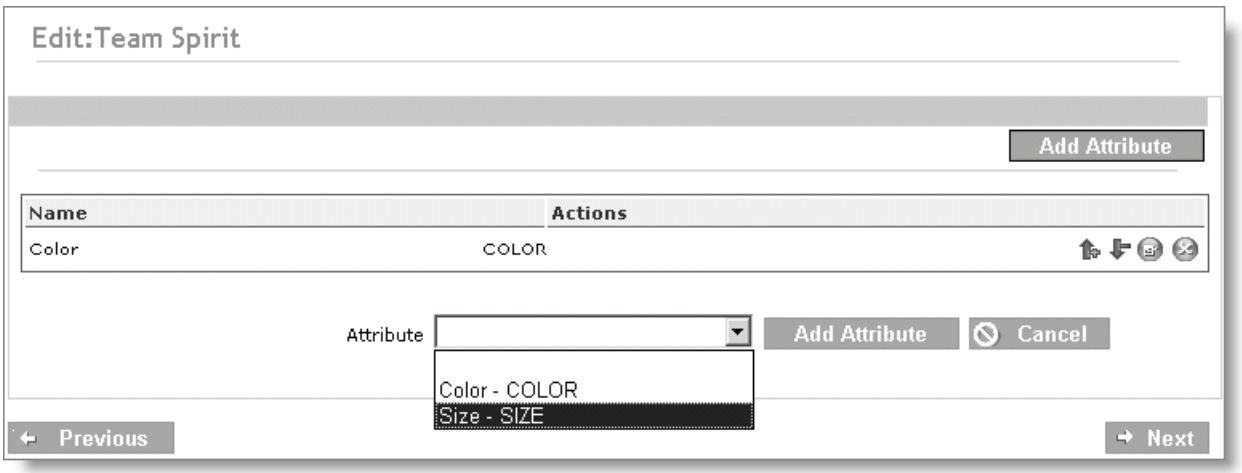
To add an attribute

1. On the Manage master products page, select a master product and page through to the attributes setup page (System Setup > Set up commerce web components > Manage master products).
2. Click Add Attribute.

The attribute drop-down is displayed.

3. Select a new attribute from the drop-down.
4. Click Add Attribute next to the drop-down.

The new attribute is displayed in the list.



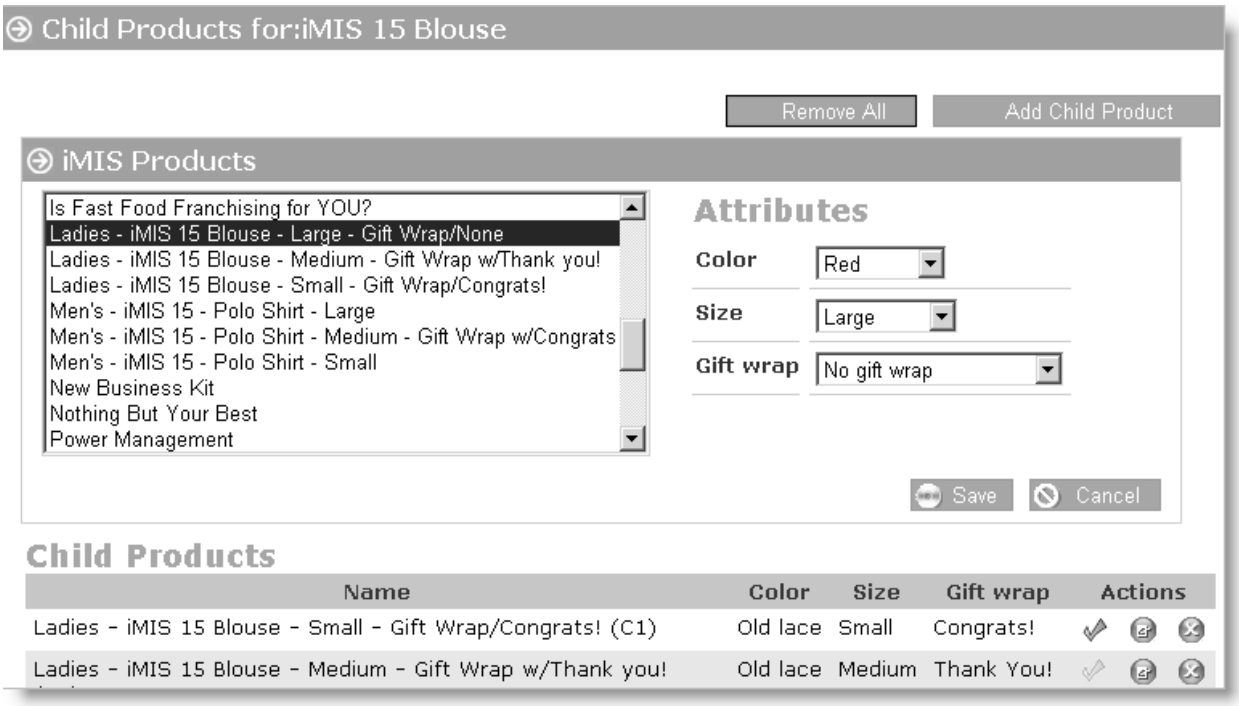
Adding child products

A group of child products are grouped under each master product. At the Child Products page, you can choose the iMIS products that make up a Master product. You can go back to add or delete child products even after you have created the master product. Deleting a child product will not remove it from the iMIS database or the Public view database. Instead, the child product is removed the master product.

To add child products

1. On the Manage master products page, select a master product (System Setup > Set up commerce web components > Manage master products).
2. Page through to the Child products page.
3. Click Add Child Product.
4. Select one desired child product in the iMIS Products list on the left side of the page.
5. Select the product's values from the drop-down menus in the Attribute section.
6. Click Save.

   The product will appear in the list of child products.
7. (optional) In the Actions column of the Child Products list, select a checkmark to designate the default child product.
8. Click Add Child Product to add additional products.

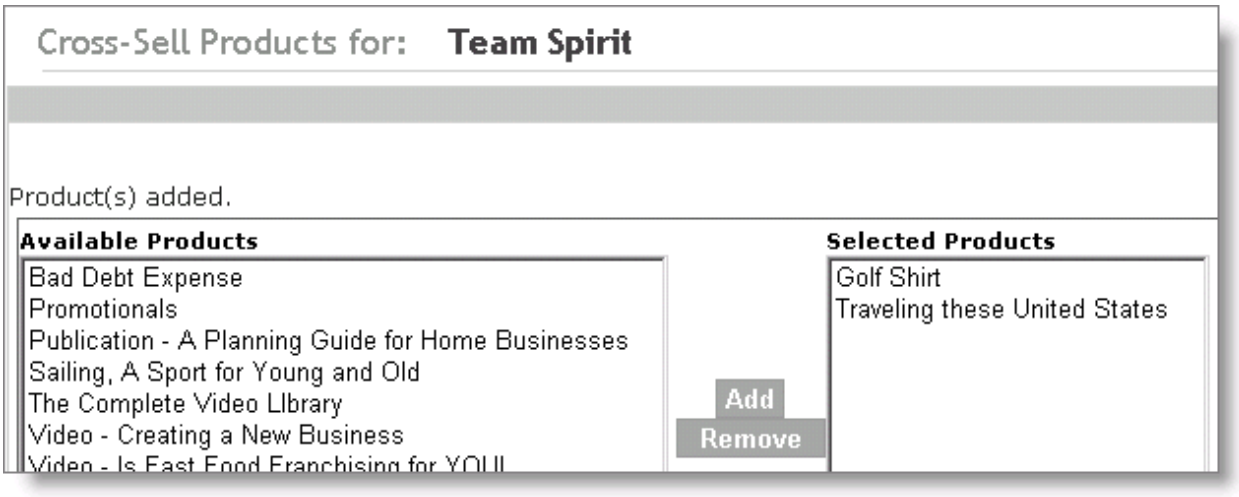


Selecting cross-sells for master products

You can select additional cross-sell products after you create a master product.

To select cross-sell products

1. On the Manage master products page, select a master product (System Setup > Set up commerce web components > Manage master products).
2. Page through to the Cross-Sell products page.
3. Select a cross-sell product from the Available Products list.
4. Add the cross-sell products to the Selected Products list.
5. Click Finish to save the products.
6. The Manage master products page is displayed.



Commerce Setup in iMIS Desktop

Orders setup for Public view

Setting up and troubleshooting freight calculation

On the shipping page, web-based views list the available shipping options for calculating freight charges. Automatic freight will not calculate if the freight by weight, total value, or total quantity is not set up correctly.

When these errors occur, the amount may be set to zero, but the user can proceed with the order without receiving an error message. These errors are logged and emailed to the system administrator.

To set up freight calculation

Freight calculations in the shipping page depend on setups in four areas:

- In iMIS Desktop, go to Orders > Set up module > Set up tables. Set up the tables for freight by weight, total value or total quantity.
- In iMIS Desktop, go to Orders > Set up module > Add-on Charges. Select Automatic Calculation of Freight Charge. Then select a type of Freight charge.
- Go to System Setup > Set up web components > Organization Configuration. In the E-mail address to notify when a product is sold (ProductSaleEmailTo) field, provide an email address for a staff member who performs setup in Orders.

- Go to System Setup > Set up web components > Organization Configuration. In the Email displayed in the From: email field (NoReplyOrgainzationEmailAddress) field, provide an email address for the staff member who performs setup in Orders.

  To access logged freight errors

  Go to System Setup > Set up web components > Error log to see freight calculation errors.

  Setting up Customer's default tax authority

  In order for Public view Orders to run properly, you must set up the Customer's default tax authority (see "Using a customer's default tax authority") option on the Web Order Options window (From Orders, select Set up module, and click Web).

  Enabling backordering on the web

  To allow out-of-stock items to be purchased in the web views, enable the Allow purchase of out-of-stock items checkbox (System Setup > Set up commerce web components > Store configuration).

  The backordered purchase is processed as a pro forma order and created as if the item is in stock and will be shipped. However, the product inventory is not affected at the time of the order.

  When an out-of-stock item is in the cart during checkout, the cart issues a message about the backordered state. The backorder quantity displayed is based on the product availability at the time the order is placed.

  You can customize the out-of-stock and backorder messages that appear during the order process. The out-of-stock message appears on the Product Detail page. The backorder message appears on the My Cart, Review, and Order Summary pages, and in the Order Confirmation sent by email.

  If the Allow purchase of out-of-stock items checkbox is cleared, orders containing out-of-stock items can not be processed in the web views.

  To enable backorders in the web views

1. From System Setup, select Set up commerce web components > Store configuration.

2. Select the Allow purchase of out-of-stock items checkbox.
3. (Optional) Customize the out-of-stock and backorder messages.

   Only one backorder message displays in the web views. The backorder message displayed is based on the backorder option selected on the Backorder Processing window (from Orders, select Set up module, and click Backorders).
4. Click Save.

Billing setup for Public view

Users can make payments for their dues and subscriptions in the Public view from Contacts > Contact Management > Billing. Depending on the accounting method you use for renewal billing, it varies which options you must select to allow this self-service functionality.

- All renewal billing processed using the Cash method: Enable the Accept payments on the web option for each billing product you want to enable for payment on the web (Billing > Set up module > Products). With this option, you can pick and choose which products you want to expose for payment.
- All renewal billing processed using the Accrual method: Enable the global System Setup option Allow customers to make accrual dues payments on the web (System Setup > Set up commerce web components > Billing Configuration). With this option, all accrual billed items are exposed for payment on the web, because accrual invoices must be paid in full.
- A mixture of Cash and Accrual renewal billing: Enable the global System Setup option Allow customers to make accrual dues payments on the web, which makes all accrual billings available for payment on the web. Then enable the Accept payments on the web option for each cash billing product you also want to be payable on the web.

Customer setup for Public view

In order for Public view Events to run properly, set up country names in iMIS Desktop.

Fundraising setup for Public view

You can collect donations online through a WCM website|topic=iParts for donation features or through the Public view|topic=Donate now! (Public view).

You can customize the online donations|topic=Customizing Public view online donations feature to suit your organization's needs.

Setting up online donations in iMIS Desktop

You must be licensed for Donate to use the online donations feature.

Follow these setup steps in iMIS Desktop to enable online donations. You may have already set up these features for other parts of your iMIS system.

1. Create a payment gateway|topic=Setting up card authorization. (AR/Cash > Set up module > Credit Card Auth).
2. Configure iMIS to use batch control|topic=Setting up batch control. (AR/Cash > Set up module > Batch Control). Online donations are automatically placed in system-generated Internet Gifts batches that are created based on the date the transaction took place. All of the transactions from a single day are placed in a batch with the same date. If today's Internet Gifts batch is closed, and a new transaction takes place, a new batch is created with today's date.
3. Determine which distributions will be credited with online donations. Either define a new distribution (see "Defining distributions and premiums") or select from existing distributions (Fundraising > Set up tables > Distributions and premiums).
4. (optional) Set up a Donor Club|topic=Defining donor clubs. (Fundraising > Setup tables > Donor clubs > Gift Amount). A Donor Club used for online donations must be set up for cash only payment.

Contact records created by online donations

Clicking the donation link takes donors directly to the I want to donate page, where they can make an online donation in three different capacities.

- Current contacts who are logged on (authenticated users) – The information from the I want to donate page is submitted to the iMIS contact's existing record.
- Current contacts who are not logged on (unauthenticated user) – The information from the I want to donate page creates a duplicate contact record for existing contacts, but it does not create a new public user record. The new contact record is assigned the default

contact type (System Setup > Set up web components > Quick setup).

- Public users who are not registered on the website (anonymous user) – The information from the I want to donate page creates a new iMIS contact record, but it does not create a public user record. The new contact record is assigned the default contact type (System Setup > Set up web components > Quick setup).

Removing the Donate link from the homepage

Melissa 5/12/09: Per DT 5270, a DONATE license now controls whether or not the donate tab appears in the public view, but this licence does not control the list of links that appears on the homepage by default. You have to manually remove the "Donate to our organization!" link.

A link to the donation page appears on the Public view's homepage even if your organization is not licensed for the feature.

To remove the donation link, delete the following line of code from the Default.aspx file using a text editor. In a typical installation, the Default.aspx file is located in the local directory for the iMIS application - c:\Program Files\ASI\iMIS\iMIS_public\Default.aspx.

<a id="ctl00_TemplateBody_HyperLink6" href-
f="Core/Donations/Gift.aspx">Donate to our organization!

Setting up credit card authorization for the Public view

Use the following steps to accept credit card payments in iMIS Public view:

1. Set up credit card authentication (AR/Cash > Set up module > Credit Card Auth). See AR/Cash Credit Card Authorization window.
2. Set up cash accounts for online registration credit cards (AR/Cash > Set up tables > Cash accounts). See Setting up credit/debit card cash accounts in AR/Cash.

   Note: The cash account codes must be prefixed with "W_" (such as "W_VISA") to accept credit card payments via the Public view.
3. Modify the web.config file to include the Gateway Account Code. See Modifying the web.-config file with the credit card gateway.

Web component setup windows

The fields described in this section are used when performing the tasks in this guide.

System Setup: Set up web components

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

Public view administrators can use the Setup web components task list on the System Setup feature to configure items for the Public view including labels for the various areas of the site and email and graphics settings.

Quick setup window

This window defines basic connection mappings and organization information required to expose the Public view of iMIS for access by anonymous users and Public users.

Caution! Quick Setup values overwrite those on the Organization Configuration page. Re-editing Quick Setup to change the default customer type, for example, would overwrite any email customizations you might have made on the Organization Configuration page. SMR_202228

From System Setup, select Set up web components > Quick setup window.

> **Note:** Note: An iMIS system administrator can change the information that is returned by search queries for both anonymous users and Public users by modifying a Default query. Refer to Where to configure the Public view Directory area for the locations of the queries.

The full name of the organization that owns the site

Enter the name to appear in the title tag of the front page of the Public view.

The abbreviated name of the organization that owns the site

Enter an abbreviated name if desired. You may leave this field blank.

The default email address for the site

Enter the email address to receive all email by default when errors occur with the site. Typically this email address is for the webmaster and the primary contact for the organization.

The default Customer Type to use when creating new customers online

(Required) Specifies the default Member Type to use when creating a new iMIS contact record for anonymous users who register themselves through the web views of iMIS. This value corresponds to the Description field in the Customer types window (Customers > Set up module > Customer types).

The default Customer Type to use when creating new organizations online

Specifies the default Member Type to use when creating a new iMIS contact record for non-individual entities. This relates to creating non-individual accounts in the Web view (see "Creating non-individual accounts in Web view"), for Full and Casual users to enter new accounts.

PBI-27805

General configuration window

This window defines variables that affect the handling of alternative currencies, and which control the title and contents of site-wide error windows.

From System Setup, select Set up web components > General configuration.

Set the Systems Base Currency Code

Specifies the default ISO 4127 currency code (and corresponding pricing) that appears in commerce-oriented windows of the Public view of iMIS.

The control is a drop-down list of ISO 4127 currency codes. When users select an alternative currency code that is different from the base currency code, the system uses values from the Iso_Currency_Codes table and the Exchange_Rate table to calculate exchange rates and display the pricing in the user's chosen currency.

To update these two tables with current exchange rate information, an SQL script called insert_Exchange_Rate_and_Iso_Currency_Codes_values.sql, and instructions for running the script, is available from the Downloads area of the ASI Technical Support site.

Display Alternative Currency

Enables the display of a user-selectable alternative currency control in commerce-oriented windows of the Public view. When cleared, no alternative currency control is available in the Public view, and all prices are displayed according to the base currency code.

Credit card prefix

Specifies the prefix used in a cash account Code (AR/Cash > Set up tables > Cash accounts) to denote cash accounts that are used specifically for web-based credit/debit card transactions.

- Public view: Only cash accounts with a code that contains this prefix value are visible in windows of the Public view related to web-based payment transactions.
- iPart-based websites: Only cash accounts that contain this prefix value are visible for public (non-staff) users. All other cash accounts are visible for staff users.

The cash account's Title field determines what is displayed in drop-down lists that enable users to specify a credit card type. For example, if your Credit Card Prefix defined in this window is "W_", and you define a cash account in AR/Cash with W_VISA specified for the Code field and Visa specified for the Title field, then public users would see Visa in the drop-down list when choosing a credit card type for their checkout transaction.

Note: Note: In a new installation of iMIS there are no default web-based cash account Codes. You must use AR/Cash to define web-based cash accounts, and

the Code used for each of those web-based cash accounts must use the prefix defined here in this field.

Generic error message

Specifies the message that will be displayed if the error does not fall into the category of unauthorized access, checkout errors, or invalid licenses.

Organization Configuration window

This window defines your organization information as it appears in the Public view. By default, iMIS pre-populates these fields with the email address entered in the System Setup > Set up web components > Quick Setup: The default email address for the site field.

From System Setup, select Set up web components > Organization configuration

Note: Note: Ensure email addresses are entered correctly. Email notifications rely on having valid email addresses.

Default Security Group

PBI-27805 Specifies the default e-Series Security Group to use when creating a new user record for anonymous users who register themselves through the Public view. This value corresponds to the e-Series Security Group field in the Web Access area of the Users window (System Setup > Security Administration > Users, then view a specific user).

Email From (CreateAccountEmailFrom)

Specifies the From address of email messages that are sent in response to create account requests from users who register for membership online. Required before any user may create a new account.

URL of registration page

Specifies the URL of the page for new account registration.

Domain Name

Specifies the domain name you want for all pages related to the Public view.

Contact person Email (EmailFrom)

Specifies the email address that sends email from your organization's Public view. Sometimes, based on your preferences, this email account is an unmonitored email address, one that includes "please do not reply to this address" in the message body. That way, an actual person's email account does not get cluttered with "bounce back" messages.

Email address to notify when an account is updated (SendToEmailOnAccountUpdate)

Designates a contact to receive notification whenever an account is updated. Required before any user may create a new account.

Email address to notify when a product is sold (ProductSaleEmailTo)

Designates a contact to receive notification whenever an order is placed. To disable notification, leave the field blank.

Admin configuration window

This window defines properties of the Error log window.

From System Setup, select Set up web components > Admin configuration.

Number of errors displayed per page

Specifies the default number of error messages displayed per page in the Error log window.

SSL configuration window

This window defines SSL (Secure Sockets Layer) options. SSL is a protocol layer placed between a reliable connection-oriented network protocol layer (TCP/IP) and an application protocol layer (HTTP). An administrator may enable SSL for two areas: Login Validation and Checkout. By default, these options are disabled during installation.

Enabling SSL provides extra security for the site by encrypting information. This security is especially important at checkout, where users may enter credit card information.

> **Note:** Note: These options only apply to non-iPart based websites, like the Public view. Enable SSL for iPart built sites at the content record level: for any content record that contains an iPart that you want to operate using SSL, enable the Content is secure (https://) property.

From System Setup, select Set up web components > SSL configuration.

Use SSL security for checkout (only applies to non-iPart based websites)

When selected, iMIS uses SSL for all shopping activities from the Public view. You must have copied your SSL certificate to the server and ensured that IIS is set up properly.

> **Note:** Note: When you select this option, SSL is enabled for both the Public view (iMISPublic) and the Web view (iMIS). If you have iMISPublic installed on a separate webserver from iMIS webapp, then you need to install an SSL certificate on both servers if you wish to use the checkout feature on both the Web view and the Public view.

Use SSL security for logon (only applies to non-iPart based websites)

When selected, iMIS uses SSL for creating new accounts and after a member is logged on to the Public view all HTTP requests use an SSL layer.

Contact us configuration window

This window defines the information that is displayed on the Contact us form.

> **Note:** Note: Be sure to select the Require a value... checkbox for every corresponding field that you want to denote as required before the user can submit the contact request.

> **Note:** Anyone can view the Contact us form, not just logged on users.

From System Setup, select Set up web components > Contact us configuration.

Be aware that choosing either Show or Require applies when anyone accesses their profile through the Public view My account, and when users access profiles from the web using Contacts.

Message displayed after the form has been submitted

Specifies the text for the body of the page that displays on the Public view after a contact has filled out the Contact us form.

Personal label configuration window

Use this window to define the labels that appear on the Personal page of the My Account area, which corresponds to the basic information in an iMIS contact record.

From System Setup, select Set up web components > Personal label configuration.

Major key

Specifies the label displayed for the field in which a user can define their own iMIS major key. The major key is a user-defined ID value (such as a member number) that can be used as an alternative way to find contact records in iMIS.

Ensure that the label used for this field corresponds to the Major Key Prompt value defined in the Customer Setup - Basic Options window (Customers > Set up module > General, Basic Options). For example, if the Major Key Prompt is defined as "SSN", specify a Major key label here that clearly indicates that the user should enter their social security number.

Designation

This indicates a label for a Designation and the default includes the CPA example. A designation indicates that the member has achieved a certification or other indicator that typically goes after the person's first and last name when appropriate.

Exclude directory

Specifies the label for the checkbox that enables a user to exclude their contact record from the Directory area of the Public view. (The visibility of the checkbox itself is enabled with the Show the Exclude from directory field checkbox on the Personal information

configuration window (System Setup > Set up customer web components > Personal information configuration).

VAT Exempt

Label for the member to indicate if they are exempt from Value Added Tax (VAT). With these labels, customers who are subject to any of the many VAT charges for products and services can enter their VAT information online.

VAT Reg Number

Label for the VAT Registration Number for the customer to enter.

VAT Country

Label for the field for the customer to specify the country on which VAT is calculated.

Address label configuration window

This window defines the labels that appear on the Address page of the My Account area, as well as other address-related labels that appear in the Events and Store areas.

From System Setup, select Set up web components > Address label configuration.

Separate labels are available for preferred billing and preferred shipping addresses, so even though there are duplicate field names, they refer to either billing or shipping information.

Cart Item Label

Specifies the text for the label for the purchase items in the user's shopping cart. This label can be changed if you want to rename the term "cart" throughout the web site.

Address type

Specifies the introductory text "This is my" for the different types of address labels.

Update Alternate Address Link Label

Specifies the text that appears as a tooltip in the Full view if a customer has entered an alternate shipping address during the checkout process. The tooltip appears over the edit button next to the alternate shipping address.

Product label configuration window

This window defines the labels that appear on the product pages of the Store area in the Public view.

From System Setup, select Set up web components > Product label configuration.

Quantity

Indicates the label for the field where customers enter the amount of a product sold in the online store.

Product price

Indicates the label for the price of a product for sale in the online store.

Payment label configuration window

This window defines the labels that appear on the credit card checkout page.

From System Setup, select Set up web components > Payment label configuration.

Credit card expires

The default label is "Expires" but you may want to inform customers of the date format.

Credit card type

The default label is "Payment Type" and it is next to a drop-down list containing for example, MasterCard or Visa.

Credit card security code (CSC)

The default label is Security Code but you may want to included the CSC acronym or explain that they flip the card over to find this three-digit code.

Misc label configuration window

This window defines the labels that appear throughout the website.

From System Setup, select Set up web components > Misc label configuration.

Comments, in Contact us

Used as the label for the Comments form in the Contact us page.

Results per page

This field specifies the label for the Directory listing results per page.

User ID Label

Specifies the label for the iMIS identifying number assigned to all user records.

SIC Code

Specifies the label for the Standard Industrial Classifications (SIC) code that identifies the primary business of an establishment.

Label for Shopping Cart

Specifies the preferred term for the online shopping container, such as cart or basket. The default is Cart.

Image configuration window

This window defines the folders in which website images and product images are stored.

From System Setup, select Set up web components > Image configuration.

Images folder path

Specifies the location of the folder that contains all the various images for the Public view of iMIS, most of which are categorized into sub-folders. The default location after installation is C:\Program Files\ASI\iMIS\iMIS_public\images.

If you specify a relative filepath (by using a / character at the beginning of your entry), the root for the relative filepath is C:\Program Files\ASI\iMIS\iMIS_public.

Default product images folder

Specifies the location of the folder that contains all product images used in the Store area of the Public view. If you do not specify an absolute path, iMIS treats your entry as a relative path from the C:\Program Files\ASI\iMIS\iMIS_public\images\ folder.

Note: Note: When specifying a relative path in this field, you do not need to prefix your entry with a / character.

Exchange settings window

This window defines the Microsoft Exchange account in your organization from which event meeting requests are sent to users who register for events through the Public view of iMIS.

From System Setup, select Set up web components > Exchange settings.

Username

Specifies the designated webmaster's domain user name required to log onto the proxy server for Exchange, prefixed by your domain name. For example, mydomain\username.

Password

Specifies specify the corresponding domain password of the designated webmaster.

Exchange URL

Specifies the URL associated with your Exchange server's Exchange Web Service page. For example, https://webmail.myorg.com/ews/exchange.asmx/.

> **Note:** Note: You can test these three settings by opening an Internet Explorer browser and entering the Exchange URL that you've specified in this Exchange settings window. A domain authentication dialog asking for your user name and password should appear. Enter the Username and Password that you've specified. If your settings are correct, an Exchange Services.wsdl page containing .xml content will display.

Maintenance mode window

This window enables you to set the status of the Public view of iMIS to maintenance mode, which prevents user from accessing the Public view. The messages you enter on this page appear while the view is in maintenance mode.

From System Setup, select Set up web components > Maintenance mode.

Set the site in maintenance mode?

When selected, this checkbox sets the Public view into maintenance mode and a message is displayed instead of the usual starting page.

The message that is displayed when user goes to the login page…

Specifies the message to display to users attempting to log on to the Public view while it is in maintenance mode.

The message to be displayed to users when the site is in maintenance mode

Specifies the message that appears on every page of the Public view other than the Logon page. You can use embedded HTML tags in this field.

Error log window

This read-only window enables you to browse the error log for the Public view. The navigation bar enables you to select how many errors to show per page and to jump from page to page.

- To sort the log entries, click column headings.
- To view stack trace details about an error, click the Error ID number.

From System Setup, select Set up web components > Error log.

Email templates window

This window allows you to customize iMIS email templates. You can design the email with HTML or CSS, modify the subject and body text, add CC and BCC email addresses, and use variables in the subject line and body. We have provided a sample email customization to illustrate the possibilities.

In addition to the addresses listed in the template's CC and BCC fields, emails are also sent to the email addresses designated in the Set up web components > Organization configuration window. You can add as many CC and BCC email addresses as you like in a comma-delimited list (bob@xyz.com,susan@xyz.com).

Each template has a set of variables that you can use in the email's subject line and body. When an email is sent, the variables are replaced with the appropriate values. Some of

these variables are configured from other System Setup areas and have been noted below.

From System Setup, select Set up web components > Email Templates.

Tips

- HTML and inline styles work best in emails, because some email clients ignore externally linked CSS files. For example, the following inline style turns the header text blue and changes the font:

  <h1 style="color:#0000FF;font-family:Georgia,serif;">Heading text</h1>

- Use full paths to images, not relative paths. For example:

- Test your email messages in different email clients to make sure everything looks the way you want.
- To receive email notifications when an account is updated, you must enable the Send an email to the site administrator when an account is updated option (System Setup > Set up customer web components > Account management configuration).

Account Updated template

The Account Updated email template can use the following variables:

- [ID]
- [FirstName]
- [LastName]
- [OrganizationLabel] - Configured from System Setup > Set up web components > Personal label configuration.
- [Organization]
- [Email]
- [WorkPhone]

- [HomePhone]
- [WebSite]

Account Address Updated template

The Account Address Updated email template can use the following variables:

- [ID]
- [Purpose]
- [FullAddress]

Create Account template

The Create Account email template can use the following variables:

- [FirstName]
- [LastName]
- [CreateAccountEmailBodyTop]
- [AccountDetails]
- [EmailSignature] - Configured from System Setup > Set up customer web components > Reset password configuration.

Roster Member Removed template

The Roster Member Removed email template can use the following variables:

- [ID]
- [FullName]
- [Reason]

New Account template

The New Account email template can use the following variables:

- [AccountCreated]
- [AddedBy]
- [AddedByID]
- [ID]
- [Prefix]
- [FirstName]
- [MiddleName]
- [LastName]
- [Suffix]
- [Designation]
- [Informal]
- [Title]
- [OrganizationLabel] - Configured from System Setup > Set up web components > Personal label configuration.
- [Organization]
- [AddressPurpose]
- [Address1]
- [Address2]
- [City]
- [StateProvince]
- [PostalCode]
- [County]
- [Country]

- [Email]

  Order Confirmation Resend template

  The Order Confirmation Resend email template can use the following variables:

- [OrderDetails]
- [ProductDetails]
- [EventDetails]
- [OrganizationName]
- [Company]
- [FullName]
- [ID]
- [Email]

  Order Confirmation template

  The Order Confirmation email template can use the following variables:

- [OrderConfirmationNote] - Configured from System Setup > Set up commerce web components > Checkout configuration.
- [BillingConfirmationText] - Configured from System Setup > Set up commerce web components > Billing configuration.
- [Details]
- [OrganizationName]
- [Company]
- [FullName]
- [ID]
- [Email]

The body of the Order Confirmation sent to Webmasters can use the following variables:

- [OrderConfirmationNote] - Configured from System Setup > Set up commerce web components > Checkout configuration.
- [BillingConfirmationText] - Configured from System Setup > Set up commerce web components > Billing configuration.
- [WebmasterCopyDetails]
- [OrganizationName]
- [Company]
- [FullName]
- [ID]
- [Email]

Contact Us template

The Contact Us email template can use the following variables:

- [ContactUsEmailMessage] - Configured from System Setup > Set up web components > Contact us configuration.
- [MailBody]

Donation template

> **Note:** Note: The Donation email template is text-only. You cannot modify it with HTML or CSS.

The Donation email template can use the following variables:

- [Subject]
- [Body]

The donation variables are configured from properties (see "Gift.aspx page properties") of the Gift.aspx page. Its default location is c:\Program Files\ASI\iMIS\iMIS_public\Core\Donations.

Community Report Inappropriate or Offensive template

The Community Report Inappropriate or Offensive email template can use the following variables:

- [FullName]
- [ID]
- [Title]
- [Explanation]
- [Title]
- [Body]
- [Link]

Community Notification template

The Community Notification email template can use the following variables:

- [Title]
- [NotificationLink]
- [PreferencesLink]

Sample email customization

In the following example, the Order Confirmation email template is customized with HTML and inline styles.

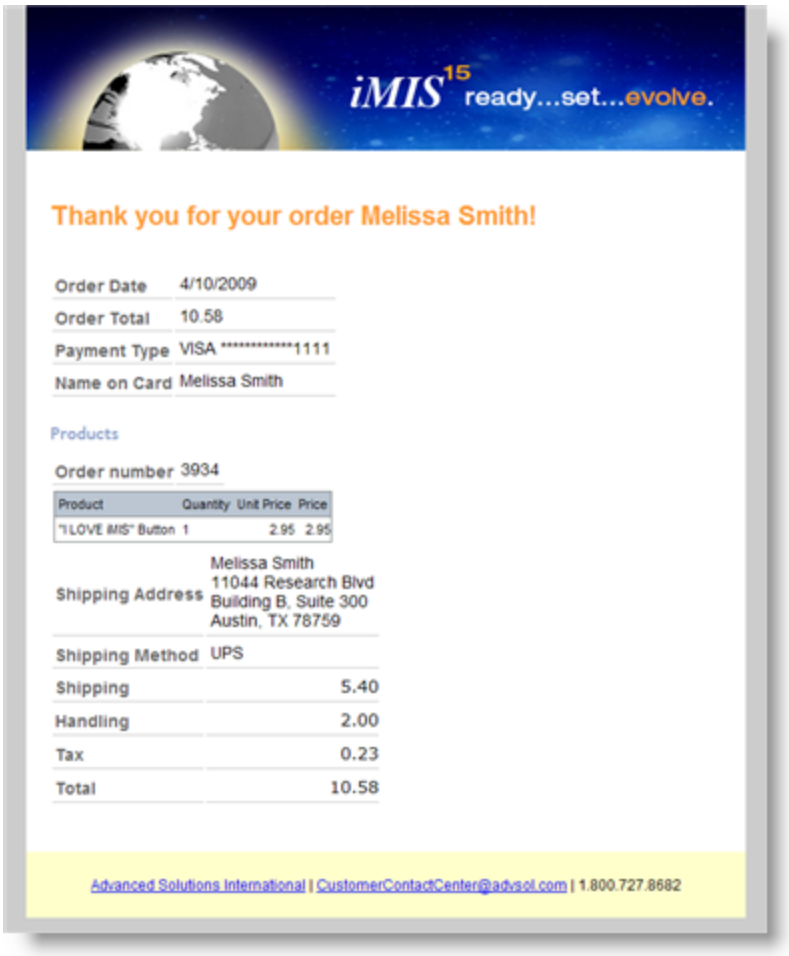
Custom code sample

```
<table width="100%" height="100%" cellpadding="20" cellspacing="0" bgcolor='#cccccc'
>

<tr>
```

```
<td valign="top" align="center">

<table width="600" cellpadding="0" cellspacing="0" bgcolor="#FFFFFF">
<tr>
<td><a href="http://www.advsol.com/"><IMG SRC-
C="http://docs.imis.com/readysetevolve_header.jpg" BORDER="0"></a>
</td>
</tr>
</table>

<table width="600" cellpadding="20" cellspacing="20" bgcolor="#FFFFFF">
<tr>
<td bgcolor="#FFFFFF" style="font-size:12px;color:#000000;line-height:150%;font-fam-
ily:arial;">
<br />
<h1 style="font-size:22px;font-weight:bold;color:#FF9A37;font-family:arial;line-
height:110%;">Thank you for your order [FullName]!</h1><br>

<p>[OrderConfirmationNote]
[BillingConfirmationText]</p>

<p>[Details]</p>

</td>
```

```
</tr>

</table>


<table width="600" cellpadding="20" cellspacing="20" bgcolor="#FFFFCC">

<tr>

<td style="font-size:12px;font-color:#666666;font-family:arial;text-align:center;">

<p><a href="http://www.advsol.com">Advanced Solutions International</a> | <a href-
="mailto:Cu-
ustomerContactCenter@advsol.com">CustomerContactCenter@advsol.com</a> |
1.800.727.8682</p>

</td>

</tr>

</table>


</td>

</tr>

</table>
```

Rendered sample email



System Setup: Set up customer web components

Public view administrators can use the Setup customer web components task list on the System Setup feature to configure items for iMIS accounts which includes user records, passwords, company, committee, and logon information.

Be aware that choosing between either show or require in Set up customer web components applies:

- when anyone accesses their profile through the Public view My account, and
- when users access profiles from web clients using Contacts

Account management configuration window

Account management enhances the customer experience by allowing a customer to control personal information.

You can also change settings for notification email messages such as a listing of account changes or just a notification when an account is updated.

From System Setup, select Set up customer web components > Account management configuration.

Include account changes in the notification Email to the site administrator

When enabled, the modifications that the customer made to their account are included in the email sent to the site administrator.

Number of days that an order is considered recent

Based on a calculation with this value, an order is classified as a recent order as long as the number of days specified has not been passed.

Send an Email to the site administrator when an account is updated

When enabled, the site administrator receives email notifications any time an account is updated at the email address specified in System Setup > Set up web components > Quick setup: The default email address for the site. If you have a different email address in System Setup > Set up web components > Organization configuration: Email address to notify when an account is updated, then that email address receives the account updates.

LogonInformationRequestMessage and PasswordResetRequestMessage

The LogonInformationRequestMessage is sent to users who have submitted the Forgot my logon form. The PasswordResetRequestMessage is sent to users who have submitted the Forgot my password form.

You can use the following variables in the email messages. When an email is sent, the variables are replaced with the appropriate values.

- [UserId]
- [ContactId]

- [Email]
- [LogonUrl]

  Use HTML or CSS to modify the look and feel of the email.

  Tips

- HTML and inline CSS work best in emails, because some email clients ignore externally linked CSS files. For example, the following inline style turns the header text blue and changes the font:

  <h1 style="color:#0000FF;font-family:Georgia,serif;">Heading text</h1>

- Use full paths to images, not relative paths. For example:

- Test your email messages in different email clients to make sure everything looks the way you want.

Personal information configuration window

Use the Personal information configuration window to select which fields display and which fields require a value when a user selects My Account > Personal or when a staff member selects Contacts > Contact Management > Personal.

From System Setup, select Set up customer web components > Personal information configuration.

Show the Member Type

Allows you to display or hide the Member Type field. If enabled, the next field must be configured.

Allow Member Type to be modified

Determines whether Public users can change their Member Type if displayed. If disabled, the field is visible but read only.

Member Type Choices

If the Allow Member Type to me modified option is enabled, this field accepts a comma-delimited list of just those codes that you want users of the Public view to choose from. For example, most organizations do not allow users to choose to make themselves active members.

Address configuration window

A customer can add and edit address information from the website. The page titles and address prompts are configured on the Address configuration window.

From System Setup, select Set up customer web components > Address configuration.

You can either just show or show and require certain fields.

Create account configuration window

The personal information displayed in the Create account process is specified in the Create account configuration window. You can mark fields as required in this window.

> **Note:** Note: If you have installed a Public view website, you must enter the base URL so users can log on.

From System Setup select Set up customer web components > Create account configuration.

Base url for public website

Enter the base URL, which is the root address for the website that does not include any subfolder names).

Send new account validation email (require that new users be validated before logging on)

Specifies whether Public users who create an account for themselves receive a registration verification email after creating an account. When selected, a user must be validated before going directly to the page they were seeking. The settings for this email are included on this Create account configuration window.

Show the SIC code field/Require the SIC code field

Specifies whether to show and/or require the user to enter the Standard Industrial Classifications (SIC) code that identifies the primary business of an establishment.

Default expiration date, in years from account creation

Specifies how many years the account exists in the system until it is marked as expired.

> **Note:** Tip: Several of the fields on this configuration window relate to creating non-individual accounts (see "Creating non-individual accounts in Web view"), for Full and Casual users to enter new accounts.

Create account page titles window

Page messages and titles for each step in the Create account process are entered in the Create account configuration window.

From System Setup, select Set up customer web components > Create account page titles.

Step n subtitle n

Each of these fields specify the text for the Create Account wizard-like pages on the Public view.

Header before the user information

This text specifies the text the user sees after successfully registering their new account.

Create account search window

On the Create account search page, you can specify certain prompts and the company information you want to be displayed when users search for their company.

From System Setup, select Set up customer web components > Create account search.

> **Note:** Tip: Several of the fields on this configuration window relate to creating non-individual accounts (see "Creating non-individual accounts in Web view"), for Full and Casual users to enter new accounts.

Search only among members of this type

Enter the member codes that you want to limit for website visitors to search.

Title of the Company Search page

Specifies the heading text on the page where members search through company records. You may want to modify this if company does not describe the types of records your visitors would search through.

Prompt to show after searching for a company

Specifies the wording for letting a website visitor know about their search results.

User must select his or her company before creating an account

Specifies whether you require that a user selects from existing company records before moving through the account creation process.

> **Note:** Note: If their company does not yet exist in the iMIS database they may enter their company's name when creating their record. However, this does not add the company record to the database or add the user's record to a company roster.

Show... in company search results

Specifies the company information displayed in the company search results.

Roster Management Configuration window

You configure the display and editing of a list of company or trade association members using the Roster Management Configuration window.

From System Setup, select Set up customer web components > Roster Management Configuration.

Roster management enabled in iMIS Web Components

Select this checkbox to allow designated company administrators to view and manage records of all contacts belonging to their company. By assigning certain user records the Company Administrator role, you can enable members to manage their group's roster.

Link displayed when a roster manager unsuccessfully searches for a member to add to a roster

Specifies the text for the option to continue with new account creation when one or more possible matching records are found in system.

Number of members to show at once

Specifies the number of members shown per page in the company roster in the Web and Public views.

New accounts can be created from roster management

Select this checkbox to allow the person with the Company Administrator role to create new accounts when managing the roster.

Subject line for Emails announcing accounts created through roster management

Specifies the subject line for email notification sent when a new account is added to a company roster by a Company Administrator.

Notify the company when a member is removed from its roster

Specifies whether an email notification is sent when a Company Administrator removes a member record from a company roster.

> **Note:** Note: Email notifications are sent to the address specified in System Setup > Set up web components > Organization: Email address to notify when an account is updated.

Warning when removing a member from the roster

Text for warning the Company Administrator that they have selected the option to remove a member from the roster.

Stored procedure that returns all names available for roster management

If you create a new stored procedure for returning the roster list names, you enter the name of the stored procedure here.

Stored procedure that removes a member from a roster

If you create a new stored procedure for removing a name for the roster list, you enter the name of the stored procedure here.

Create account settings window

When users set up an account, they can choose how they would like their information to be handled. In addition, the system administrator can set options for informing the new user about the new account. These preferences can be specified on the Create account settings window.

From System Setup, select Set up customer web components > Create account settings.

Show the Exclude from directory field

Specifies whether to show the checkbox so that the user can choose to be excluded from the Public view directory so that other members cannot search for them.

Require a value in the Exclude from directory field

Specifies whether you require the user to choose to be excluded from the Public view directory.

Show the Exclude from mail field

Specifies whether to show the checkbox so that the user can choose to be excluded from mailings from your organization.

Require a value in the Exclude from mail field

Specifies whether you require the user to choose to be excluded from mailings.

Allow creation of a web logon during account creation

When selected, enables the user to create their own logon when creating an account.

If the record found has no Email address, use the one that was typed in (AllowNewEmail)

When selected, specifies that the user can enter a new email address, carrying forward the newly entered email address into Step 2 of registration.

Logon configuration window

The logon window is the first window a user encounters when creating an account or registering for any service on the Public view website.

Before logging on, users are given options by default:

- Log on
- Look up their account, from a Forgot my ID link
- Create a new account
- Reset my password

These options are set in the Logon configuration window.

From System Setup, select Set up customer web components > Logon configuration.

Remember me time (years) (LoginTimeout)

Specifies the number of years the browser may remember the password.

Show the Create account link

When selected, the Please create a new account link appears on the Public view website. If you want to remove the ability for users to create accounts, clear this selection.

Show the Find me link

When selected, a user can look up their account information with their email address, first name, last name, and zip code through a link under the Log on area of the Public view website.

Show the Reset password link

When selected, a user can have an email sent to them with a new password through a link under the Log on area of the Public view website.

Forgot logon or password configuration window

When a user selects Forgot my ID, iMIS searches the database for an existing record. The search parameters the user enters are defined in the Forgot logon or password configuration window.

From System Setup, select Set up customer web components > Forgot logon or password configuration.

User choice when the desired record was not found, 1

Specifies the message the user sees if iMIS does not find their record.

Find contact: Show results before Emailing password (FindMeShowResultsFound)

Specifies whether results from a search are given before iMIS emails the password to the user conducting the search.

New account: Show results before Emailing password (NewAccountShowResultsFound)

Specifies whether results from a search are given before iMIS emails the password to the user creating a new account.

Reset password configuration window

Every message a user sees during the Reset Password process has been created by an administrator in the Reset password configuration window.

To reset a password, a user account must have been previously created. Resetting a password is a simple process. After clicking the reset password link at Logon, a user types an email address into a text box. After a user clicks submit, iMIS sends an email containing a new password. The two link names by default are Reset My Password and Trouble Logging on.

If a user cannot access the email address used in iMIS, then an iMIS administrator can go into the System Setup > Security administration > Users > User Credentials area and type in a new password, and then tell the contact over the phone what their new password is set to.

From System Setup, select Set up customer web components > Reset password configuration.

Committee configuration window

The display of the Committees directory is determined by the stored procedures and values entered in the Committee configuration window. The stored procedure pulls the committee description from the database.

> **Note:** Note: To display a committee to web clients, enable its Show on web option (Customers > Setup tables > Committee codes).

> **Note:** To change the search queries for committees, modify $ > ContactManagement > DefaultSystem > Queries > Directory > Committee in the Document System.

From System Setup, select Set up customer web components > Committee configuration.

User defined fields window

The Public view administrators can define custom pages that contain user-defined fields from the User defined fields window under Set up customer web components. These pages appear within account management as another page.

From System Setup, select Set up customer web components > User defined fields.

The Public view administrators can add user defined fields to the personal information page within account management. These will appear in a section of the Create account process pages. Administrators also have the ability to define custom pages within account management and assigned user defined fields to those pages.

It is important to note the following

- All user defined fields (UDF's) must be assigned to a window before that can be used on a Public view page.
- Each table must have the Always Create checkbox checked so that each user has a record inside every user defined table.
- Public view does not support multiple instances.

The user defined fields setup page can be found within the Customer administrative section.

Unassigned fields

All UDF's found will be listed in the Unassigned Fields section on the right side. The UDF's will be listed in a tree format by the table name that the field is assigned to.

Assigned Fields

Any UDF that has already been assigned to a page will be displayed in the Assigned Fields section on the left side. The first step in assigning UDF's is to choose the page. By default, administrators can choose to assign fields to the CreateAccount process or to the PersonalInfo page. Once you have selected the page, you can add UDF's to that page by dragging any unassigned fields from the right side onto the name of the page on the left side.

Adding a UDF to the create account process or the personal information page

To assign a UDF to a page, simply drag the UDF name from the Unassigned fields onto the name of the page in the Assigned fields section. You can change the order of fields listed by dragging up or down in the list.

Removing a UDF from a page

Administrators can remove any UDF from a page by clicking the Delete icon next to the UDF in the Assigned fields section.

System Setup: Set up events web components

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

Public view administrators can use the Setup events web components task list on the System Setup feature to configure items for the Public view including event registration setup and paying for event registration with a credit card.

Event setup window

Use the Event setup window to configure events and functions for online registration.

You must log on as a user with rights to the Administrator or EventCoordinator security key to perform event setup.

From System Setup, select Set up events web components > Event setup, and select an event.

Certain messages have an upper limit for the number of characters the message can contain. For example, the Registrant page message field on the Registrant tab has a character limit of 255 characters maximum for the field.

> **Note:** Tip: You can also select events to define from Events, by selecting Define an event, select or create an event, and click More > Web Setup Wizard.

Events configuration window

The Events web feature messages and default values are set in the Events configuration window. Event registration setup options are also on this page.

> **Note:** Note: You must enable the Allow account creation during Event Registration option if you want the user to be able to create a new account during the registration process.

From System Setup, select Set up events web components > Events configuration.

Create an internet batch for each event (WebBatchOption)

Specify whether to create a new Internet batch for each event. When a user registers for an event over the Web, a batch is created automatically. A batch number generated from a web event registration is identified with a description of “Internet”. The format for the batch number is dictated by your batch control setting. If the Auto Date Batch Numbers option is enabled, the batch code is XXX-1, XXX-2, XXX-3 where XXX is the date and the 1,2,3 is the consecutive numbering for batches with the same date.

Next button for events calendar (Either text or image)

Enter either an angle bracket as text, or you can enter the HTML tag <img src-c="http://domainname.com/imagelocation/filename.jpg"alt="Next"> if you want to use an image file for the Next or Previous buttons on the events calendar. Note that you do not want to use any other embedded HTML tags, such as wrapping the <img> tag with any link tags (such as <a href="">), because the goal is to use the image as a clickable link to the next or previous page in the events calendar.

Meeting type for alternate registration

Enter the code for the type of meetings that have alternate registration enabled, set in the Type field on the Define an event window. Separate the codes with a comma.

Location of custom event registration

Enter the URL for a custom event registration starting page relative to the base URL of the Public view website.

Location of custom summary page

Enter the URL of a custom event summary page relative to the base URL of the Public view website.

System Setup: Set up commerce web components

Public view administrators can use the Setup commerce web components item on the System Setup window to configure the Public view orders and billing features. Most of the windows in this setup area are self-explanatory. For the more complex procedures you are guided step-by-step for ease of use. Some setup is required in iMIS Desktop.

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

Store home window

Store home is the main setup page for all of Public view Orders setup.

- Set up categories
- Edit categories
- Delete categories
- Associate products with one or more categories
- Assign Featured Products status to items
- Change the web status and sort order of each product

From System Setup, select Set up commerce web components > Store Home.

Store configuration window

Public view administrators use the Store configuration window to control the behavior of Public view components pages such as how icons are displayed, how products are sorted, and messages that are displayed about inventory.

From System Setup, select Set up commerce web components > Store configuration.

To streamline users' view of cart items

By default, users see all of the products, dues, and events they have added to their shopping cart.

To control which types of items are displayed in the cart, use the Show products/dues/events in the cart checkboxes. If you clear one of these checkboxes, then the cart does not display items of that type.

Checkout configuration window

During checkout the user is led through a procedure for verifying the order and submitting shipping and payment information. These options are set on the Checkout configuration page.

From System Setup, select Set up commerce web components > Checkout configuration.

Purchase order value used for no charge checkout

Specifies the code value for a purchase order used for no charge at checkout time.

Show the link to add a meeting to a calendar in Outlook/Exchange

When selected, a link to send a meeting request is displayed in the Public view task list so that the user can add a meeting to their calendar by clicking "Add to calendar" and then selecting which meeting to add. You must ensure that your Exchange account settings are tested and working correctly.

Credit card label configuration window

During checkout users must submit verification of information for a credit cards. These prompts are set on the Credit card label configuration page.

From System Setup, select Set up commerce web components > Credit card label configuration.

Credit card security code (CSC)

Specifies the label for the field that prompts for a CSC code, the three-digit security code on the back of a credit card.

Cart manager window

The Public view administrator can view the items in a user's shopping cart. On the Shopping Cart Manager page, the administrator can change and delete items in the cart including product purchases, event registrations, and dues payments.

From System Setup, select Set up commerce web components > Cart manager.

Manage product attributes window

the Attribute Setup window enables an administrator to:

- Create new attributes.
- Delete attributes.
- Modify existing attributes titles, codes or descriptions.
- Add values to attributes.
- Modify values.

Note: Note: Every attribute must be created and complete with values before you add child products. Modify every attribute before continuing.

A single attribute may be used for several products. You do not need to form new attributes for every master product.

For example, any number of values may be added to a single color attribute. Not all of the colors will display on an item's page. The page only shows that item's available colors.

A pair of pants possessing only two color choices, black and blue, uses the same color attribute as a shirt with 25 different color choices. At the pants information page, viewers see a drop-down menu with 2 choices. At the shirt's page, shoppers see 25 choices. The same color attribute is linked to both products.

Manage master products window

You define master products to sell different versions of a single product from one page in the Public view. For every master product, you can define attributes, add child products, and list cross-sell products.

From System Setup, select Set up commerce web components > Manage master products.

Billing configuration window

The Public view administrator can set prompts for the Billing page on the Billing configuration page.

From System Setup, select Set up commerce web components > Billing configuration.

Billing page text (after title)

Specifies the description for the billing page.

Label for BillingWebUserControl, a web user control that may be used on client sites (Advanced)

Specifies the text that appears on a configured billing page in the Public view.

Add billing information to confirmation e-mail

Select this option to enter custom text for the order confirmation email message. Enter the desired text in the Text that will appear... field. This text appears on the payment email message in addition to all other payment information set up to display in the message.

Allow customers to make accrual dues payments on the web

Enable this option if you want line items billed using the Accrual accounting method to appear in the Public view under Contacts > Contact Management > Billing. All accrual billing items must be paid for at the same time; users cannot optionally select or deselect items that appear in their Billing list. If a contact's items have been billed to another party, those items appear in the Billing list for the Bill to ID. See Billing setup for Public view for more information.

Working with Content Gallery iParts

iParts are the foundation of your iMIS sites that you build with RiSE. This section helps you to understand and master the critical iParts that present attractive and dynamic content to your users.

What are iParts

An iPart is an iMIS-specific web part that represents a building block of features that you can place on a content record with other building blocks to create new pages of features. Multiple iParts can be combined and displayed in a content record as you prefer.

Default iParts appear throughout iMIS. You can modify them for your needs and you can reuse iParts throughout the system. For example, an iPart displaying a roster for a Membership Group can follow the same user behavior patterns as an iPart for a roster in Events.

Configuring iParts

iPart configuration allows you to:

- Define how the iPart will behave
- Control how much access you want end users to have
- Hide configuration details from end users; two instances of the same iPart with different configurations can appear as two different controls to the end user
- Examples:
- Allow users to edit on a staff-facing site, but display the data in read-only mode on a pub-

lic-facing site

- Use multiple instances of an iPart on one page to access different sets of data

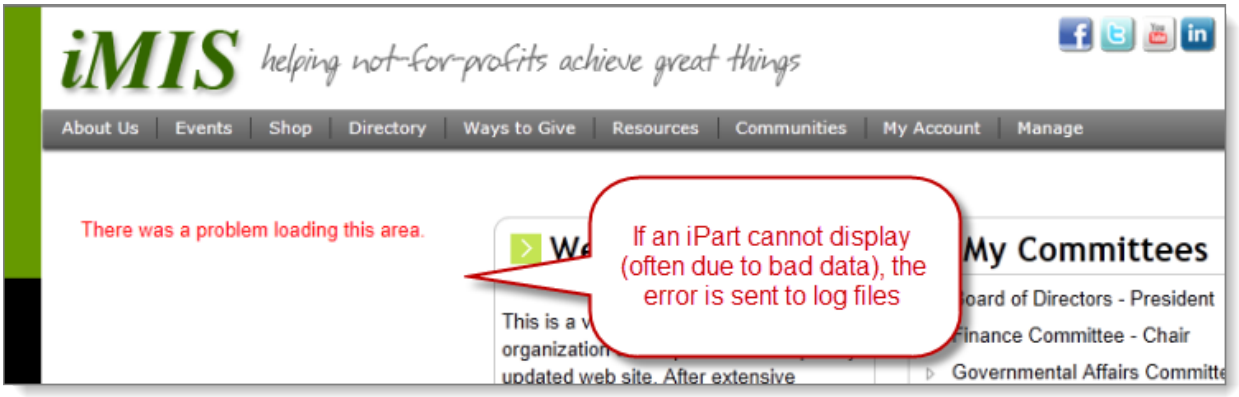
Run-time versus design-time

iParts have two different views:

- Design-time view: What you see in a content record when you add an iPart and configure it.
- Run-time view: What your end-user sees when viewing the iPart within your website. This may differ from what you see in the Design-time view, because some iParts have a different behavior after you publish the content.

Troubleshooting iPart errors

Occasionally, an iPart may fail. However, it will fail gracefully in place, without disabling the whole page. Typically, a “problem loading” error results from some kind of bad data. By default, iMIS hides the error details:



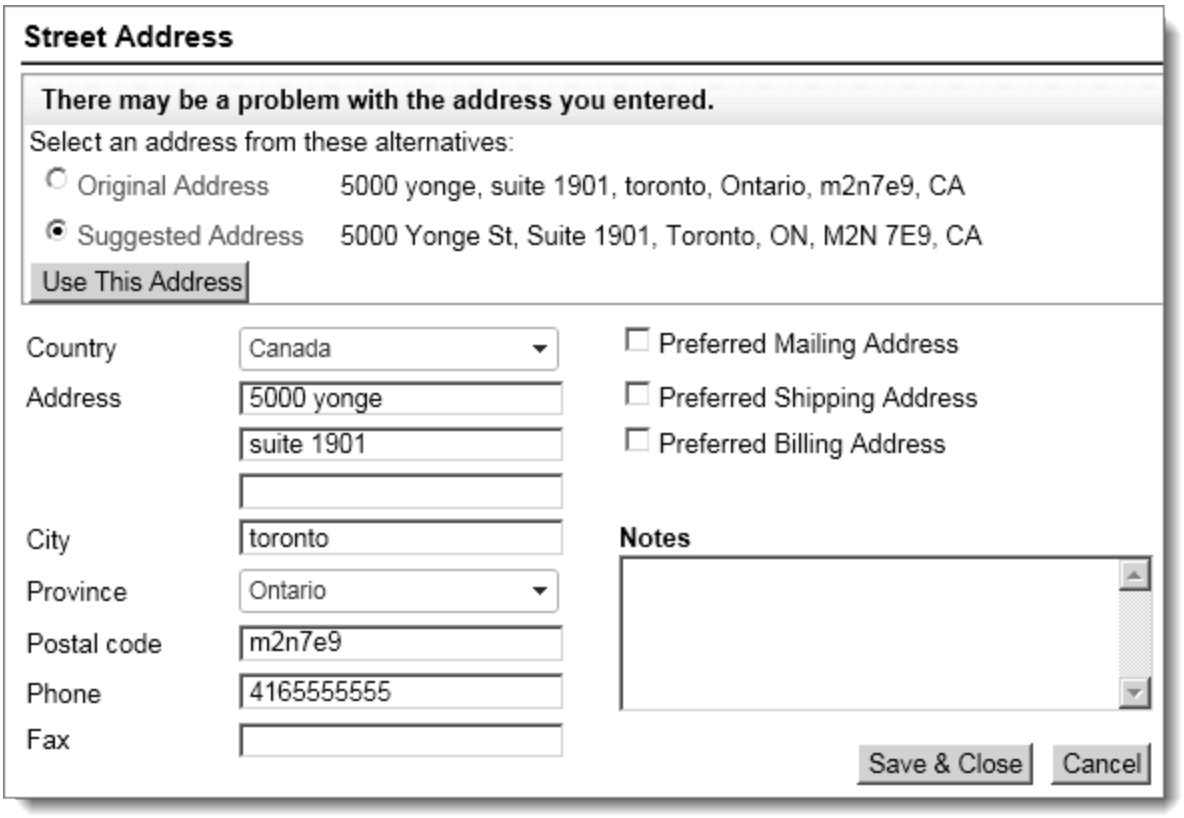
The settings controlling this error logging reside in the <log4net> section of your site’s web.config file. The default settings enable error logging in the Windows Event log and comprehensive logging in the ASI log file, which captures both errors and warnings. This log file, Asi.WebRoot.log, is in the folder above your website root.

Contact your hosting administrator if you need access to information in these logs.

Address verification for iParts

iMIS SOA can perform real-time address verification using web services hosted by ASI. There are several benefits to this:

- Running this verification through the ASI web service frees you from having to install and maintain these data files locally.
- Offloading verification to this service keeps it from adding to the processing load of your page.
- The services of different address providers can co-exist, making it possible to verify addresses across multiple countries.
- The service can support future verification of collections of addresses as well as single ones.
- Postal addresses entered in the Contact Account Creator and Contact Address Editor iParts automatically upload to this service that verifies and standardizes the address. Users can then either accept the suggested address or keep the original as it was entered.



The countries supported by this service are subject to change. Contact your AiSP to obtain an up-to-date list.

Passing URL Parameters

Many iParts allow you to change the content they display based on the value of a URL parameter. This gives you the freedom to create a single content record. This record can be reused and the display can be changed based on a value sent in a link to the page. For example, instead of creating a new content record for every event, you can reuse a single content record that displays different event information based on the EventKey value in the URL.

Parameter values are passed to iParts from a several types of sources:

- Search result links
- IQA query links
- Navigation items

- Relative links
- Absolute links

  For any iPart that allows URL parameters to be passed, see the configuration help file for detailed instructions.

  Tip: If multiple values are sent to a page for a single URL parameter, the first parameter value wins. For example, if the URL pointing to the Event Display iPart is http://my-org/Events/Event_Display.aspx?EventKey=SPR12&EventKey=FALL12, only the SPR12 event displays.

  Note: URL parameters set by navigation items cannot be manually overridden in the URL. A user cannot change the parameter value in the URL to display different content.

Specifying commit sequence

If you place more than one iPart on a page, you might need to specify the order in which actions occur on that page. The commit sequence function allows you to explicitly define the execution order of multiple iParts in a content record.

You can define a commit sequence value for the processing order of each iPart relative to the other iParts in the same content record. The commit sequence value must be zero or greater. iParts with a value of zero (the default) are processed after any other iParts with a non-zero commit sequence value that are in the same content record.

Setting a commit sequence is only required in a few scenarios and is noted in an iPart's configuration help if needed.

Security for iParts

Most security is defined at the content record level within iMIS. You can choose that different iParts display for different users. For example, an unauthorized user might see the description of a Special Interest Group, but a signed-in member might see the roster for the group and a staff person might have the privilege to add, edit, or delete the group.

iPart Examples

-

Displaying query results in iParts

The iParts described in this section use IQA queries to drive the data displayed to users. Each iPart provides a unique way to display the data.

Query Chart Viewer iPart

The Query Chart Viewer displays query results in a chart, which can be set to a range of sizes, skins, and chart types.

Designing queries for Query Chart Viewer

The Query Chart Viewer can render any existing query, but you will get the best results by following these guidelines on how to design queries specifically for use with this iPart:

- Queries: The queries you create for the iPart should be structured so that the results are appropriate for charting. For example, if you want the chart to display the total sales per salesperson, then the source query should be written using the Sum function in IQA.

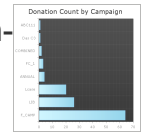
- Query Display Columns: Each property you select on the Display tab in IQA is available in the iPart's configuration page as a Data column display option. Note, however, that you can only select two properties to be displayed in the iPart.
- Aliases: In your source query, enter an Alias for the Display properties you plan to show in the iPart. Relying on the default labels may not be sufficient, especially when your query uses multiple joined sources or custom SQL expressions. If the query does not display as you expect, using an Alias often resolves the issue.
- Sorting: You can sort the query results displayed in your chart in ascending or descending order. To sort your results, edit your source query and, from the Sorting tab, add the property to be sorted.
- Labels: The labels on your chart's x-axis may overlap if there are too many data points or if the labels are too long. You may be able to improve the display through a few methods. In the iPart, you can expand the width of the chart or change the label angle. In the query, you can try to reduce the number of data points.
- Dates: For dates to display correctly, you must cast them as float data types with an offset of 2. You can do this in IQA from the Custom SQL Expression section of the (Display tab). For example, if you want to display the OrderDate property in your chart, add the following expression: CAST(OrderDate AS FLOAT) + 2. Then, when you select this property from the Data column list in your iPart, set the Data column format to a date format.
- Integers: If integers display incorrectly in your chart, cast the column to a data type of INT in the Custom SQL Expression section of IQA's Display tab. For example: CAST (OrderCount AS INT).

Chart Types

You can display the following types of charts in the Query Chart Viewer iPart.

Chart Type	Example
Area - Displays data in an area filled with color to illustrate trends. For example, create an area chart that shows a member's giving history over time. Note: You can only display one area of data in the iMIS Area chart.	

Bar - Horizontal - Displays sets of data with horizontal rectangular bars for comparison. For example, create a horizontal bar chart that shows the number of donations received by each of your fundraising campaigns.



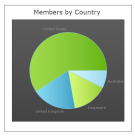
Bar - Vertical - Displays sets of data with vertical rectangular bars for comparison. For example, create a vertical bar chart that shows the distribution of your members across states.

Bubble - Displays data as a series of bubbles. For example, create a bubble chart to show the total number of function registrations for an upcoming conference.

Note: You cannot assign a size value to the bubbles in the iMIS Bubble chart.

Line - Displays data as a series of data points connected by a line to illustrate trends. For example, create a line chart that shows a member's giving history over time.

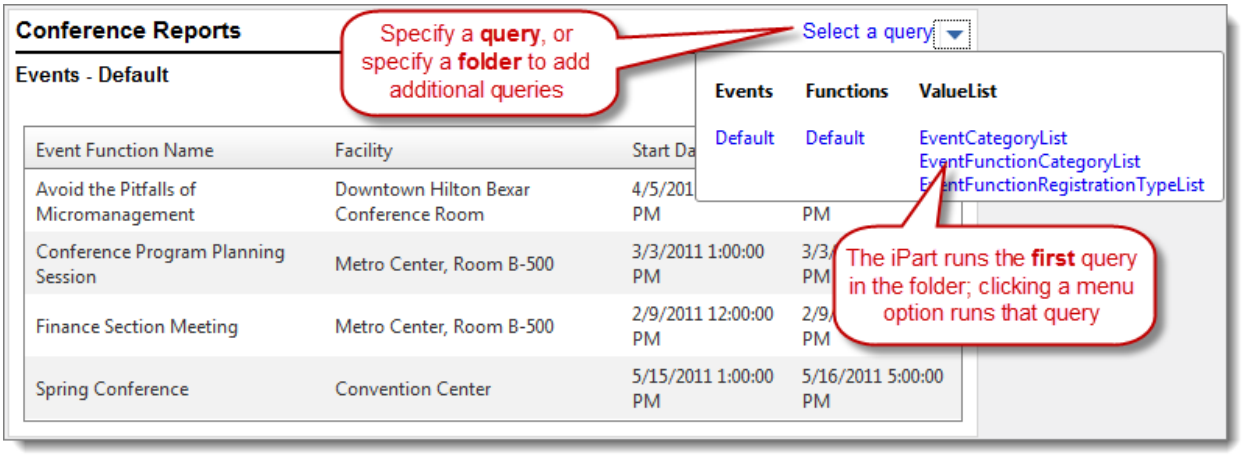
Pie - Displays data in a circular chart divided into sections to illustrate proportion. For example, create a pie chart that shows the proportions of your members by country.



Query Menu iPart

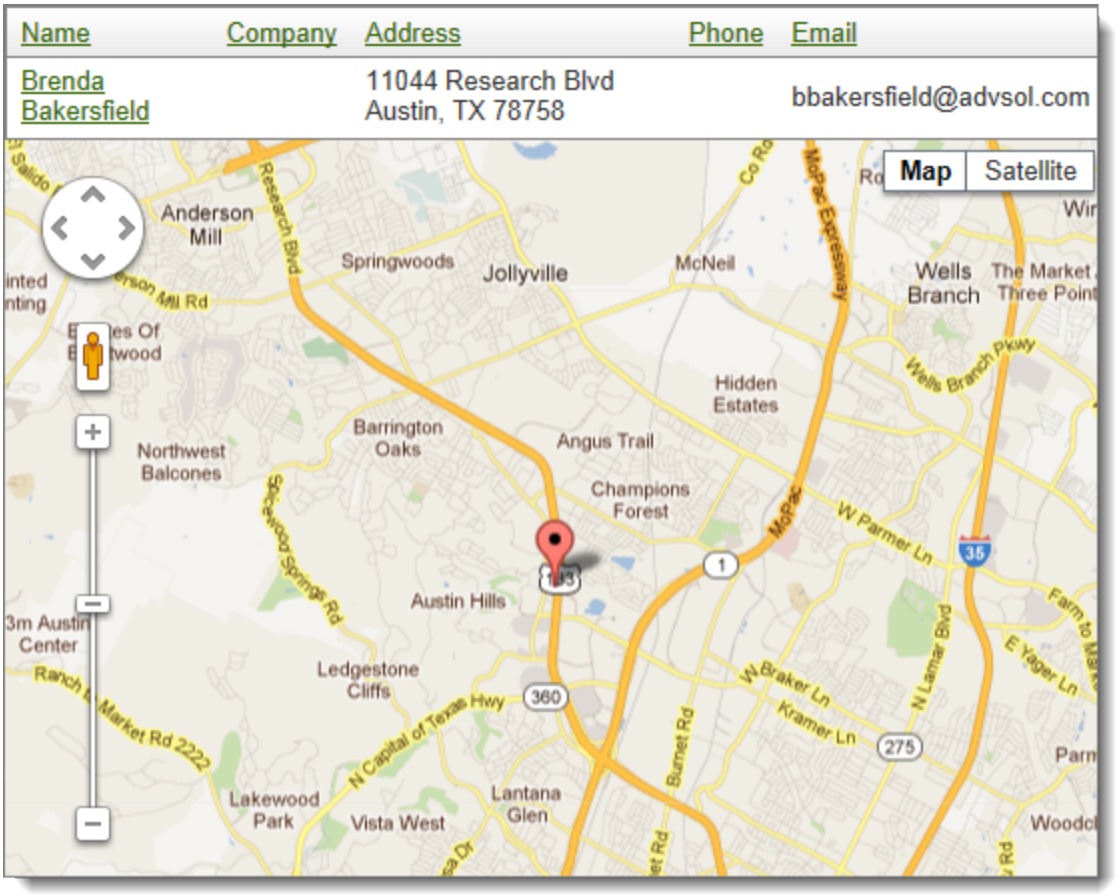
The Query Menu iPart lets you merge query results into your site for tremendous utility. You can set the iPart to display a query, set with whatever title, parameters, columns, labels, and sorting you need, and you can enable exports, which adds icons for sending the data to Word, Excel, PDF, and CSV.

You can also organize helpful queries into a folder and point the iPart to that folder. When the page loads, the iPart displays the first query at the top of that folder, and it presents a drop-down menu of additional queries available, organizing them by subfolders, if any. When the user clicks on a query from the menu, the iPart immediately runs that query and displays the results.



If the query selected contains an address property, you can configure the iPart to automatically map the query results when an address is available. Only one address property per query can be mapped. When this option is enabled, the iPart looks for the following

address properties in this order and maps the first one it finds: FullAddress, Address, FullAddressText, AddressText, Address Text, and Full Address Text.



Related Items iPart

With the Related Items iPart, you can display a list of profile or product pictures based on the results of an IQA query. For example, you can write a query to display the profile pictures of everyone who has registered for an event, made a donation, or ordered a particular product, or to display products in the same category. You can configure the list to display horizontally or vertically, to display a name for the item, and to choose the size of the image. You also have the option to make the profile picture a live link that opens a URL of your choosing, such as the member profile page.

Guidelines for working with the Related Items iPart

- The pictures displayed in the iPart are based on iMIS product or contact IDs. When creating the query for this iPart in IQA, you must select a property that returns an iMIS product or contact ID on the (Display tab). Give this property an Alias of key_Id (the Alias is case sensitive).
- To define the image to display for each record, include a column in your query that specifies the image file name for that record. Give this property an Alias of Image.
- To display a name for each record, include a column in your query for the name of the item or contact. Give this property an Alias of Name.
- When you add Display columns to the query in IQA, they become available within the iPart as Filter columns to filter on.
- You can dynamically filter the query results displayed in the iPart based on the value of another iPart's URL parameter. For example, you can set up your donation page to display the profile pictures of people that have donated to a particular cause (called a distribution in iMIS). The Donation Creator iPart uses the URL parameter itemid to determine which distribution the donation should go towards. If you add your iPart to the same content record as the Donation Creator, then you can set up the Related Items iPart to look at the value of itemid to determine which profile pictures to display. You just have to make sure that your query includes the CsActivity.Product Code property, so that you can select it as a Filter column on the iPart's configuration page. Once selected, enter itemid for the Filter on URL parameter, so that the iPart knows to filter the results based on that URL parameter's value.

  Example: Display other products in the same category

  In this example, the Related Items iPart is set up to display clickable images for other products in the same category as a particular product. This example uses content installed for the sample Member site.

  Go to Content Designer > Manage Content:

1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > RelatedItems. Select RelatedProducts.
4. Filter Options dropdown, select ProductCategory. ProductClassKey.
5. Filter on URL parameter, type in Category.Class.
6. For the Items link to (URL or shortcut), type in ItemDetail?iProductCode={key_Id}&Category={ProductCategory}.ItemDetail?iProductID={key_Id}&Class={ProductClassKey}. This uses the ItemDetail shortcut to link each item in the list to the product page. The particular item's product ID and category are specified in URL parameters so that the correct product and related products are displayed in the resulting product page.
7. Click Save & Publish to complete the content record.

Example: Display other users who have purchased a product

In this example, the Related Items iPart is set up to display clickable profile pictures of other users who have bought a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

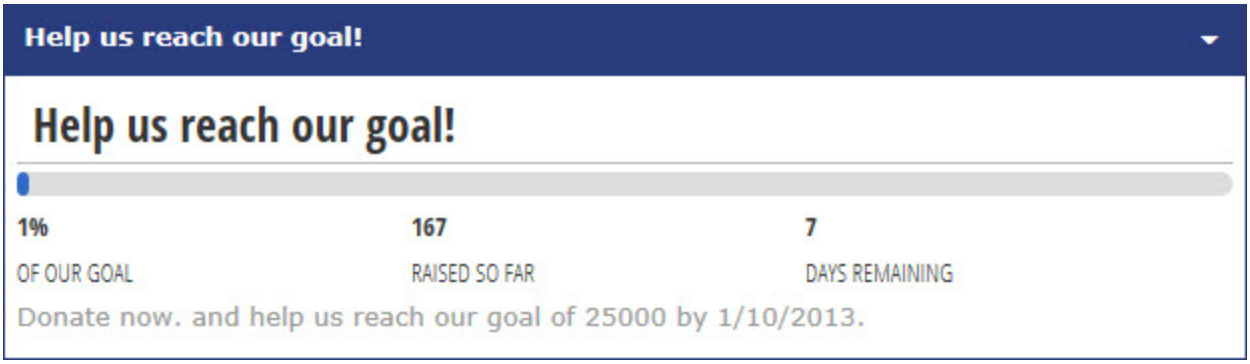
1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Content Types > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > QueryProfilePictureList. Select Orders.
4. Filter column dropdown, select ProductCode.
5. Filter on URL parameter, type in iProductCode. iProductID.
6. For the Items link to (URL or shortcut), type in MBR/Party.aspx. This redirector web page looks for an ID in the URL parameter and then checks the ID's party type and the user's permissions to determine which content record to display. The user's ID is appended to any URL specified in this field.
7. Click Save & Publish to complete the content record.

Progress Tracker iPart

With the Progress Tracker iPart, you can visually display progress towards a goal based on the results of an IQA query. For example, connect this iPart to a fundraising query, so that your members can easily track the progress of a fundraising effort towards a specific goal. Or connect it to an events query, so that you can see at a glance how many people have registered for an event.



To set up the Progress Tracker

1. Create a query for the Progress Tracker.

   Note: For sample queries that will work with this iPart, see $/Samples/ProgressTracker/ in IQA.

The Progress Tracker uses three pieces of information supplied by an IQA query: a goal amount, the sum total of what you are tracking, and the end date (which is optional). When you build your query for this iPart, it must contain specific aliases. In IQA, create a new query and choose the business object you want to query on. Make sure you are in Advanced Mode, then from the Display tab, choose properties to assign the following aliases to:

- Goal_Amount: Indicates which property is the goal amount. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST(25000 AS INT) as a property to set the goal amount to 25,000.
- Sum_Total: Indicates which property is the amount to be summed. The percentage displayed in the Progress Tracker is based on this amount compared to the goal. It can be a monetary amount or any other number, such as the number of event registrations.

  Tip: From the Function dropdown list for this property, select Sum, so that only one row is sent to the iPart. This is not required, but it will improve performance.
- End_Date: Indicates which property specifies the end date. This alias is only required if you want to display an end date in the iPart. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST('2012-12-25' AS DATE) as a property to set the end date to 25 December, 2012.

2. Add the iPart to a content record and configure it.

   Go to RiSE > Content designer > Manage content:

1. Do one of the following:

- Select a Content Folder and click Edit.
- Select New > Website Content.

2. Click add content.
3. Go to ContentTypes > Utility.
4. Select Progress Tracker.
5. Click OK.

6. Enter the iPart CSS class to style the Progress Tracker. Two styles have been pre-defined that you can use in the iPart: ProgressTracker and ProgressTracker2. You can edit these classes to change the look and feel, or you can create your own style for the Progress Tracker.
7. Select a Source query.
8. (optional) Select a data column by which you want to filter. You can use this feature to dynamically update your Progress Tracker, based on the value passed to it in the URL. If you choose to filter on a data column, then also enter the name of the URL parameter, which the iPart uses to identify the value to filter on. For example, to limit the results of an event query to a specific event, you can select the EventCode property and give the URL parameter a name such as EventCode. The progress displayed will then reflect only the event code which is included in the URL as EventCode=[EventCodeValue].
9. (optional) Enter any messages you want to appear in the iPart. The variables below can be used in the descriptions. For example, "Help us reach our goal of {0} new members by {2}!"
   - {0} displays the goal total
   - {1} displays the current sum total or count
   - {2} displays the end date in a long format
   - {3} displays the end date in a short format
10. Select the Caption Options. In addition to the progress bar, you can also display the values as text. If any of the Caption Options are unavailable after selecting a query, this indicates that the required aliases have not been defined in the query.
11. Select the Progress bar location. The bar can be displayed above or below the captions.

    Note: You can also use this iPart to display only a countdown (days remaining to a certain date). In configuration, only select the caption option Display days remaining, then for the Progress bar location, select (None).
12. Click OK.

SSRS Report iPart

The SSRS Report iPart lets you display the results of any IQA query on any page where you place it. The SSRS iPart uses the version 10.0 ReportViewer, which supports IE8 natively and, in IE8, adds a Print button on its toolbar. You can add the SSRS iPart to any content page using CM: open the Utility folder and choose the content type SSRS Report.

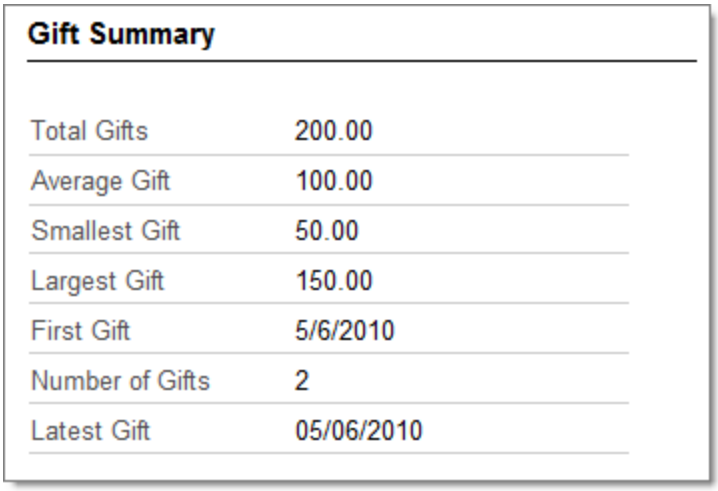
The iPart lets you customize whether to display the export buttons for PDF and Excel versions of the report. You can change the default design (layout, colors, fonts) of your reports by editing the SSRS parameters in the SystemConfig table.

How it works: The process engine specified by the iPart loads a report template (.RDL file) from the document system and creates a report data source (a DataTable) based on an IQA query's SQL source; the report viewer then combines the template and query to generate the report's output. When you configure the iPart, you specify the Document system path to the SSRS Report runtime, which must be a link to an SSRS Process Engine. Click the select link next to the textbox, then browse to your reports (such as $/Samples/ReportingServices), and pick one of the runtime entries.

Tip: Identify a process engine (run-time report) by the arrow on its icon!

Summary Display iPart

The Summary Display iPart displays a single row of query results in a form view.



Gift Summary

Total Gifts	200.00
Average Gift	100.00
Smallest Gift	50.00
Largest Gift	150.00
First Gift	5/6/2010
Number of Gifts	2
Latest Gift	05/06/2010

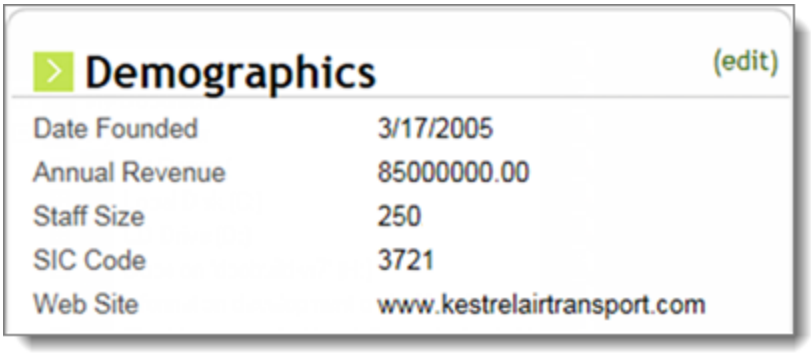
Guidelines for queries displayed in the Summary Display iPart

When creating a query that you want to display in the Summary Display iPart, keep the following guidelines in mind:

- This iPart only displays a single row of query results.
- If you connect the iPart to a query that returns more than one row of results, only the first row is displayed.
- Tip: You can dynamically filter your query results by the currently logged in user, a selected contact, or a date. See Adding dynamic filters to queries for more information.

Panels and custom data

Panels are custom displays of iMIS data that you are able to name, build, arrange in grids, and add to your site. Using panels, your users can browse, edit, add, and delete their data, as you specify:



Panels display within Panel iParts, which allows your users view and edit custom data on the broadest range of browser and platform types that iMIS supports. You can manage your custom data directly and conveniently from the web pages where you place these iParts:

- Panel Editor (which creates panels and shows one panel) --
- Panel Collection Editor (which combines existing panels into tabbed displays)

You can configure the iParts to let your users add and edit that data directly from their browser page. You can import your existing user-defined tables (from iMIS Customizer) directly from the Panel Editor iPart configuration. In addition, your Activity table data is

automatically available as a source, so that you can use and extend that data. Panel sources can include existing user-defined tables (defined in the UD_Table table) and user-defined sources (listed in the ObjectMetaData table).

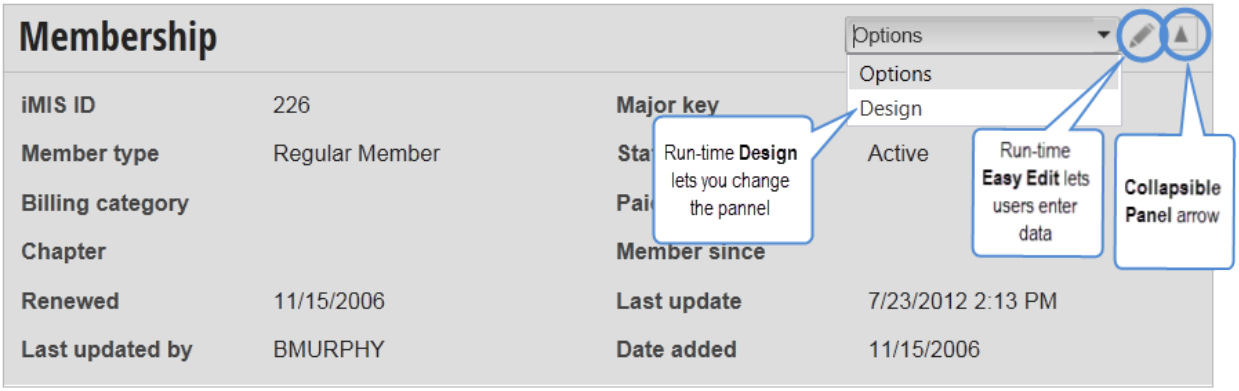
Tip: Panels are shared: when you update one panel, it updates within every iPart that uses it.

Creating custom panels of data

In a few clicks from your browser, you can have a new panel that displays the data you want, labeled and made editable as you need.

1. Enable Easy Edit by clicking on the button at the top right hand corner of the screen.
2. Once Easy Edit has been enabled, you will find and click the icon at the bottom left corner; this is the Content Designer.
3. From the Content Designer, click add content > ContentTypes > Content > Panel Editor
4. Select (New Panel) from the Panel drop-down menu.
5. Drag in and arrange your desired data, then Save & Publish.

   Once you have placed a panel iPart into a content record and published it, you can then edit the panel directly: As a system administrator, you see a run-time Design command, which lets you make quick changes to the panel, changes that save and publish for you automatically. For extensive panel work, such as to change the type of data it shows, use Easy Edit to access all of the content design features.



Best practices for panel layout

Here are key layout features to help you design the best use of screen real estate on the page:

- Multiple columns: Click + or – icons next to the panel layout to add/remove columns in your panel. For best display results, place multi-column panels into single-column content records.
- Hide in Summary View: Check this box on certain properties to trim the initial display of the iPart to the read-only information that is most useful. Only when users open the full window for viewing or adding/editing (as you configured it) do they see the additional information.
- Read-only: Check this box to provide information in read-only form while still allowing users to edit other information on the panel.

  Tip: To prevent editing of all of the properties, simply disable Allow users to edit on the iPart Configuration, rather than in the Panel definition.
- Collapsible panel: In order to maximize utility and minimize scrolling on the page, users are able to click on the arrow to expand and collapse iParts.

  Tip: Be sure to add an optional Title to any iPart that you make collapsible, so that title bar text guides your users as to what information they will access by clicking Show.

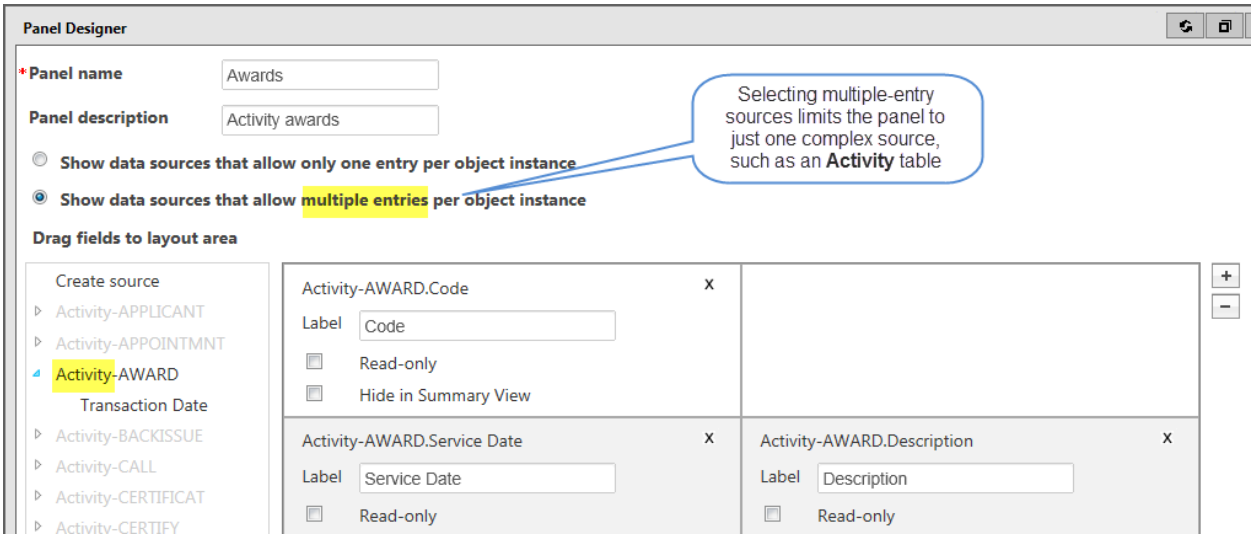
  Panels for Activity data

  Most organizations need to show activity information on their websites. All of the Activity data in your iMIS database appears as complex (multi-entry) sources when you use Panels.

  Suppose you created new award types in the general lookup table called AWARDS and want to add them to a page for dynamic editing. In a few clicks, you can have exactly that:

1. Enable surf-to-edit.
2. Click add content.
3. Go to ContentTypes > Panel Editor.

4. Click OK.
5. In the Panel list, select (New panel).
6. Select Show data sources that allow multiple entries per object instance.
7. Drag in your new data sources.
8. Click Save & Close.
9. Select Allow users to edit.
10. Click OK.
11. Click Save & Publish.



All of your Activity data appears as available sources when you select multiple entries for the type of data source.

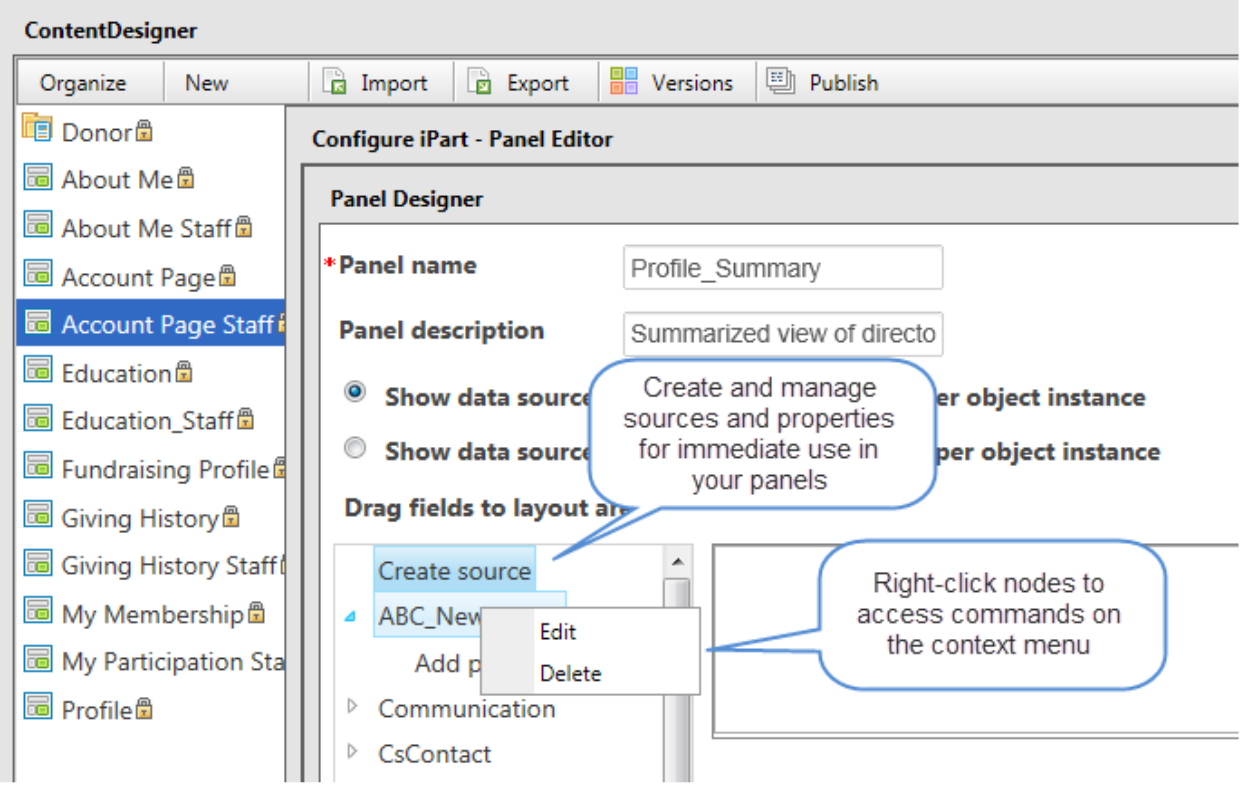
Tip: If you want to combine data from different sources, be sure to show simple sources (the first radio button option). Only one complex table can display in a panel, so the others are grayed out as long as any one of them has properties placed in the panel.

Defining your own data with Panel Designer

With the Panel Designer, you can not only craft reusable panels that combine fields from many tables, but you can also define new data structures (business objects and

properties) to manage information for your organization. Without special tools or knowledge of the iMIS schema, you can add data sources on the fly, right from your browser. When you save the panel, you have saved your newly created data sources as iMIS business objects.

Tip: You can see your new data source show up as a business object in Business Object Designer, but it will be read-only: continue to edit and manage these special sources in Panel Designer itself.



Access the Panel Designer by editing or creating a panel in a Panel Editor iPart.

To create a new panel source and properties

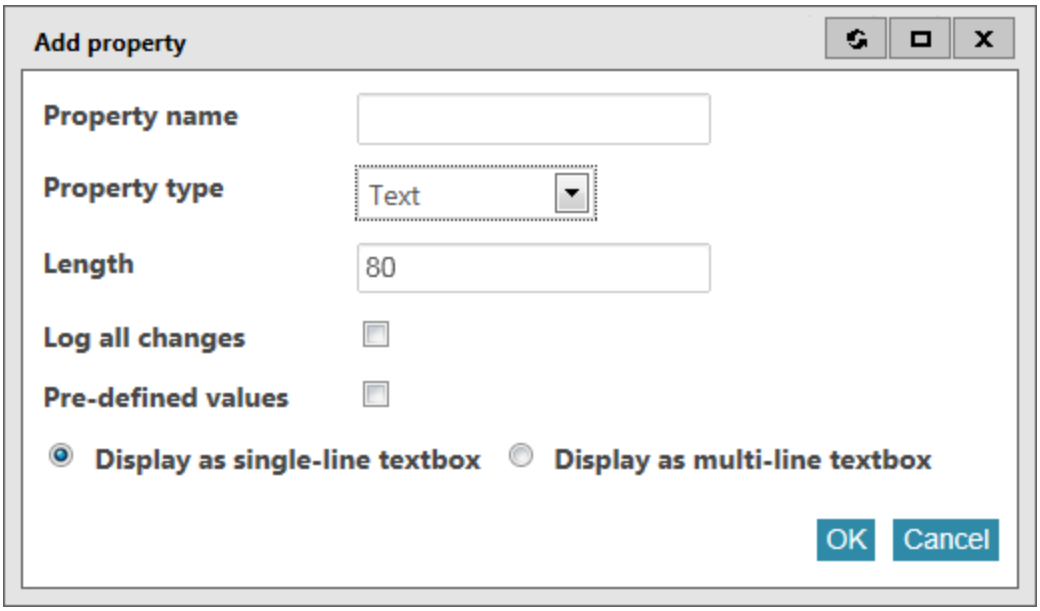
To create your own data source with properties, you work within Panel Designer. Each new source you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

1. Select New > Website Content.
2. Click add content.
3. Go to ContentTypes > Content.
4. Select Panel Editor.
5. Click OK.
6. From the Panel drop-down list, select (New panel).
7. At the top of the source tree, select Create Source.
8. Choose a Name for each new Source that meets these criteria and click OK:

- Starts with a letter
- Contains only letters, numbers, and underscores
- Is unique across iMIS, not matching any existing iMIS data or SQL Reserved Words

  Tip: Use an organizational prefix (such as ABC_*) so that your sources are unique, sort together in the tree view, and are easy to identify as ones that you created.

9. Select Add Property for the new source added.



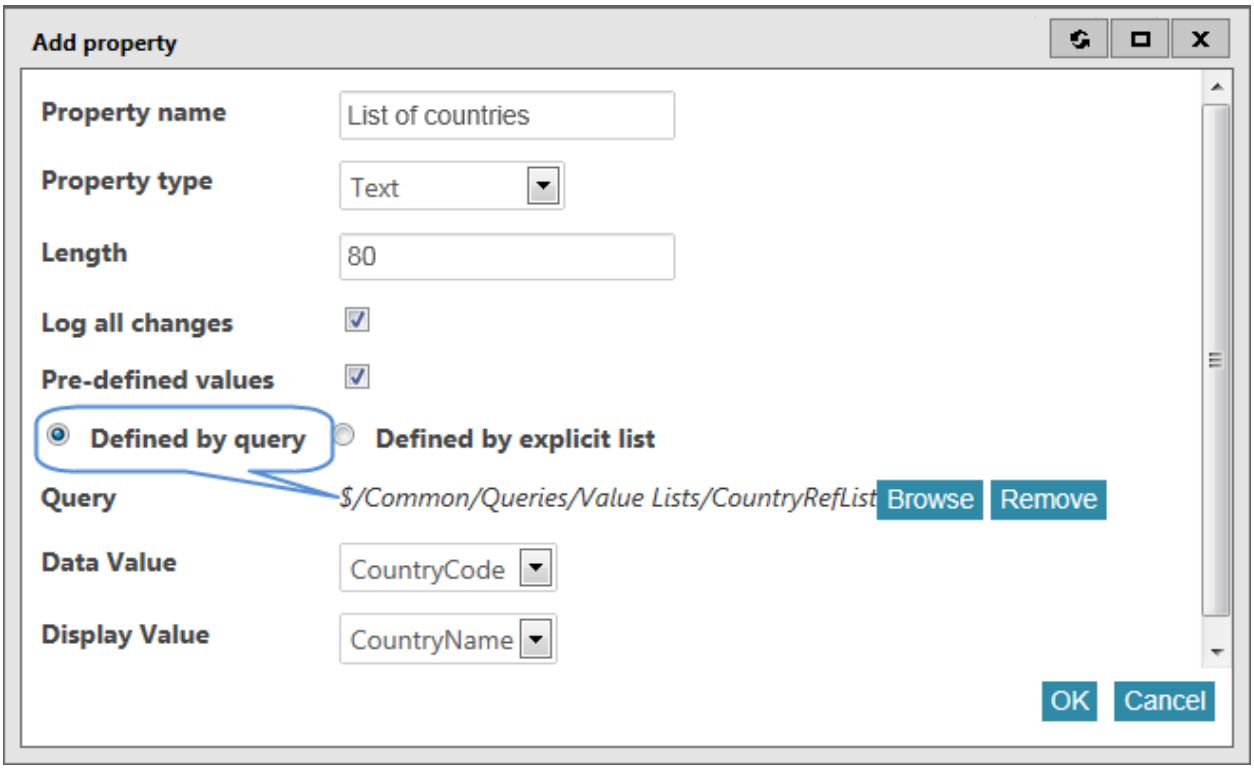
10. Enter a Property Name.
    - Starts with a letter
    - Contains only letters, numbers, and underscores
    - Is unique within its Source
11. Choose a property type that best fits your purpose, within these valid ranges:
    - Currency: 19 total digits (precision), with 4 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Date, Date and Time, Time: January 1st, 1753, through December 31st, 9999
    - Decimal: 28 total digits (precision), with 12 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Email: Creates a mailto link, which launches the user's default mail application when selected.
    - Integer: -2,147,483,648 to 2,147,483,647 (±2 billion)
    - Text: By default, the Text Property type allows:
    - Free-form entry up to 400 characters (defaults to 80). You can select to display the text-box as a single line or multi-line textbox.
    - Pre-defined values from a query or explicit list that display as a drop-down list at runtime:
    - Query – For example, you may want to use a query that returns a list of countries.
    - Explicit List – For example, you can add a list of colors the user can select as their favor-ite.
    - URL: Creates a live hyperlink, which launches a new instance of the browser to open the link when selected.
    - Yes/No: Boolean

12. Enable the Log all changes if you want to track any data change made to the property you are adding.

    Hint: Add the Change History Display iPart to a content record if you want to display data changes made in the Name and Name_Fin tables as well business objects.

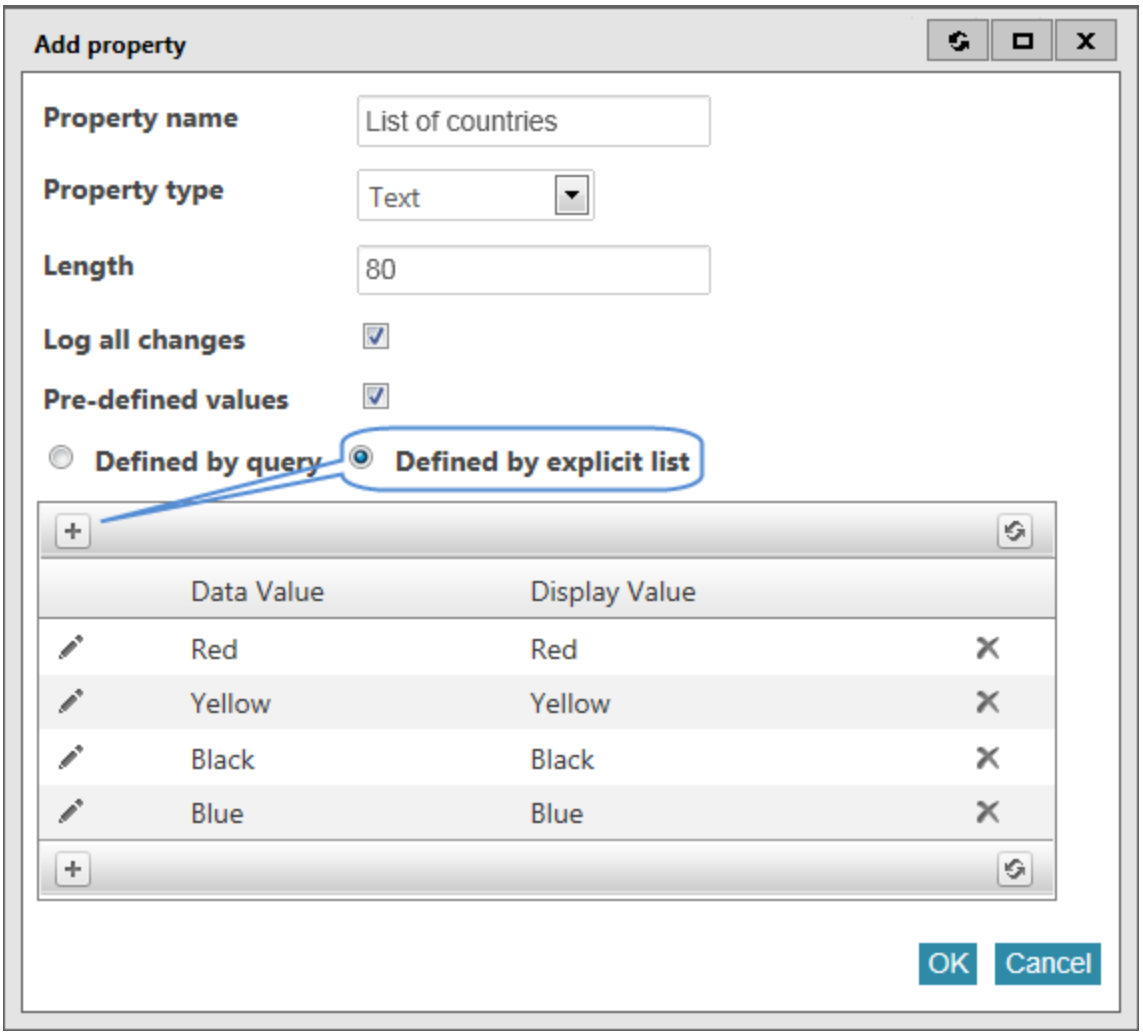
13. (Text Property type only) The Pre-defined values option allows you to present a list from which the user can select.

- The Query option provides validation-type properties based on the query results. For example, instead of typing out a list of countries, you could select a query that displays country values.
- Enable the Pre-defined values checkbox and select the Defined by query option.
- Click Browse, select a query, and click OK.
- Two additional fields display, Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel. For example, the country code may not be as clear as the country name.
- Select the fields from the drop-down list in the Data Value and Display Value fields.
- Click OK.



- The Explicit List option allows you to create a list to display on the panel. For example, you may want a user to select their favorite color.
- Enable the Pre-defined values checkbox and select the Defined by explicit option. A table grid displays.
- Click + to add a data row. The data row contains two icons: Insert and Cancel, and two fields: Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel.
- Enter the appropriate values in the Data Value and Display Value fields.
- Click the checkmark located to the left of the data row.
- Click + to add additional data rows.

- Click OK.



14. Drag the field(s) to the layout area.
15. Save the panel to save the source and properties. Once you save a property, you cannot rename it. Note that the sources will alphabetize properly on reopening.

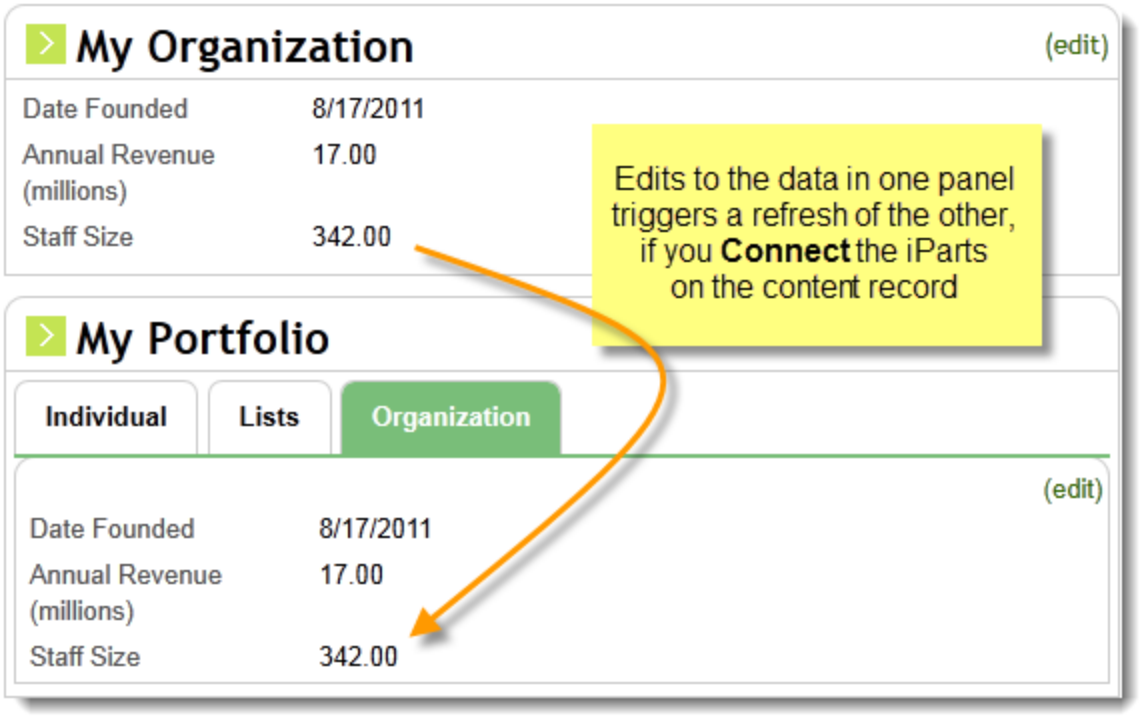
    Each new property you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object property is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

    Tip: Do not save until you create all of the properties. This way, you can view them as a set of properties and improve your naming convention before it is finalized.

16. Save and close the Panel Designer window.
17. Save & Publish the content record.

Connecting iParts to refresh panels

When you combine panel-displaying iParts on the same content record, data might appear out of sync after the user edits it, if both panels display the same property. You can solve this refresh problem through the iPart's Connect feature, which you enable separately from Configure.



Note: Check an iPart's Configuration Help topic to find out if it supports any connection options. An iPart has no connection support (neither consumer nor provider) unless its author added it.

To connect panels for dynamic updating

1. Edit a content record and add two user-editable iParts that display panels (Panel Editor, Panel Collection Editor).
2. Set up the first connection:

- From the first iPart's title-bar menu, select Connect.

  The Connect box that opens shows you any current connections and lets you disconnect them.

- Select Create a new connection.

  The Connect box that pops up prompts you to create one of four connection types.

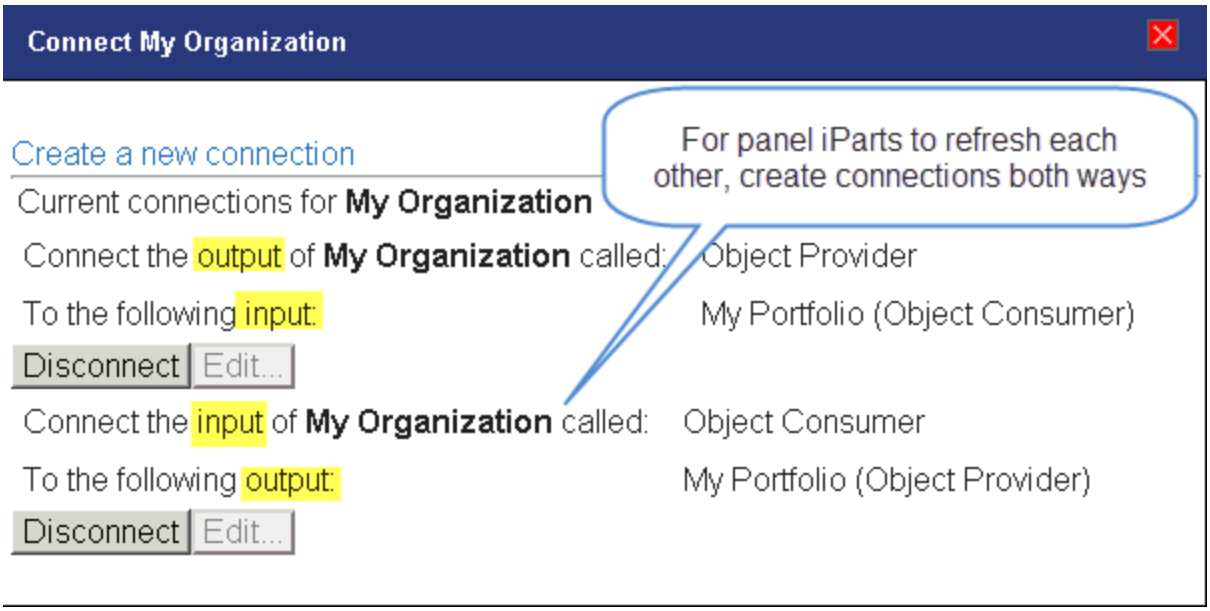
  Tip: Do not be misled by the language of connection. The Consumer is the actor that triggers a refresh on another iPart, and the Provider provides a pointer to itself to the Consumer.

- From the Object Consumer drop list, select the panel iPart you want to refresh.
- Select Connect.

3. Set up the second connection:

- From the second iPart's title-bar menu, select Connect, and select Create a new connection.
- From the Object Consumer drop list, select the first iPart.
- Select Connect.

  You should see a pair of connections, for mutual refreshing.



4. Save and Publish the content record.

Adding existing business objects to panels

Panel Designer lets you create new data sources on the fly, access any user-defined tables, and make full use of the Activity table. It can also display your existing business objects, if they meet these requirements and configuration settings:

Referencing existing business objects

Panel Designer can display existing business objects that have a ContactKey or ID property. When ContactKey or ID is the primary key, Panel Designer treats it as a single-instance table; otherwise, it assumes it to be multi-instance.

Panel Designer cannot display your business objects until you add them to the ObjectMetaData table. While attached to the iMIS database in SQL Server Management Studio, run this SQL statement:

INSERT INTO [dbo].[ObjectMetaData] (ObjectName, RelatedToEntity, IsUserDefined, IsMultiInstance)

VALUES ('MyObject', 'Party', 0, 0)

- Replace MyObject with the name of the business object, table, or view that is related to Party.
- Change the last value to 1 if it is multi-instance.

Settings for Business Object Designer (BOD)

1. In Business Object Designer, edit your object and open the BOD (Properties tab) > (Display tab).
2. To make a property available to your panels, enable its Available to UI? option.

   Tip: To see your BOD changes immediately, restart IIS.
3. To enable multiple selection for a property, select Check box(es) under Display Control so that you can enable the Allow multiple selection? option.
4. To enable HTML editing, select HTML Editor under Display Control. Be sure to use the property in a single-column panel to provide the control adequate width.

   Troubleshooting

   If you get an error when creating a new data instance at runtime (either single- or multi-instance), check that your business object does not have a 'Read-only' constraint set on the ContactKey or ID property's Definition tab.

Connecting picture iParts to Facebook

You can set up the Contact Mini Profile and Contact Profile Picture iParts to prompt people to use their Facebook profile picture in iMIS, instead of uploading a picture. To use this feature, you must do the following:

- Contact your Hosting Administrator to enable Enable the Facebook feature in the web.config file
- Create a Facebook app so that your website can connect to Facebook
- Enable the iPart configuration option to Prompt for Facebook connection

When enabled, signed in users are prompted to connect to Facebook when they edit their profile picture and wherever their profile picture is displayed.

To create your Facebook application and use it in iMIS

1. Contact your Hosting Administrator to request that they do the following: Edit your web-site's web.config file, located by default in C:\Program Files\ASI\imis\net. Find the EnableFacebookApi property, and change the value to true.
2. Create your Facebook application.

- Log in to the Facebook Developers site.
- Click +Create New App.
- Enter an appropriate App Display Name and App Namespace for your organization. Only the App Display Name will be visible to users.
- Click Continue and complete your App creation.
- On the Basic info page for your App, enter the Site URL for your iMIS application.
- Take note of the App ID Facebook has created for you.

3. Contact your Hosting Administrator to request that they do the following: Add your Face-book App information to the required iMIS JavaScript.

- Edit your iMIS Facebook.js file using a text editor. By default it is located in C:\Program Files\ASI\imis\Net\AsiCommon\Scripts\SocialMedia.
- Find the appId value and update it with the ID issued to you by Facebook.

To load the Facebook API

1. Edit your website's master page. By default it is located in C:\Program Files\ASI\im-is\Net\App_Themes.
2. Add the following html within the <body></body> tags of your master page:

To enable the Facebook connection in iParts

Configure each instance of the Contact Mini Profile and Contact Profile Picture iParts used in your website to enable the options Allow picture change and removal and Prompt for Facebook connection.

Note: When the Facebook feature is disabled in the web.config file, the Facebook options do not appear in the Contact Mini Profile or Contact Profile Picture iParts.

Using the Content Block iPart

With the Content Block iPart, you can empower authorized users to create and edit content directly on a page, without using Surf-to-Edit or accessing Tools. Through iPart configuration, you can allow users to insert HTML content, add attachments, create child pages, and submit replies. At its simplest, a content block can be HTML that is read-only unless the user has permissions to see the edit command. At its most complex, a block can act as a message board with multiple posts, child posts, and replies. You can limit the number of posts to a set number, or you can leave it at the default (zero), which lets it grow indefinitely.

Note: for guidance in creating a Content Block, follow the steps outlined in Creating Custom Panels of Data, and select Content > Content Block

How groups own content

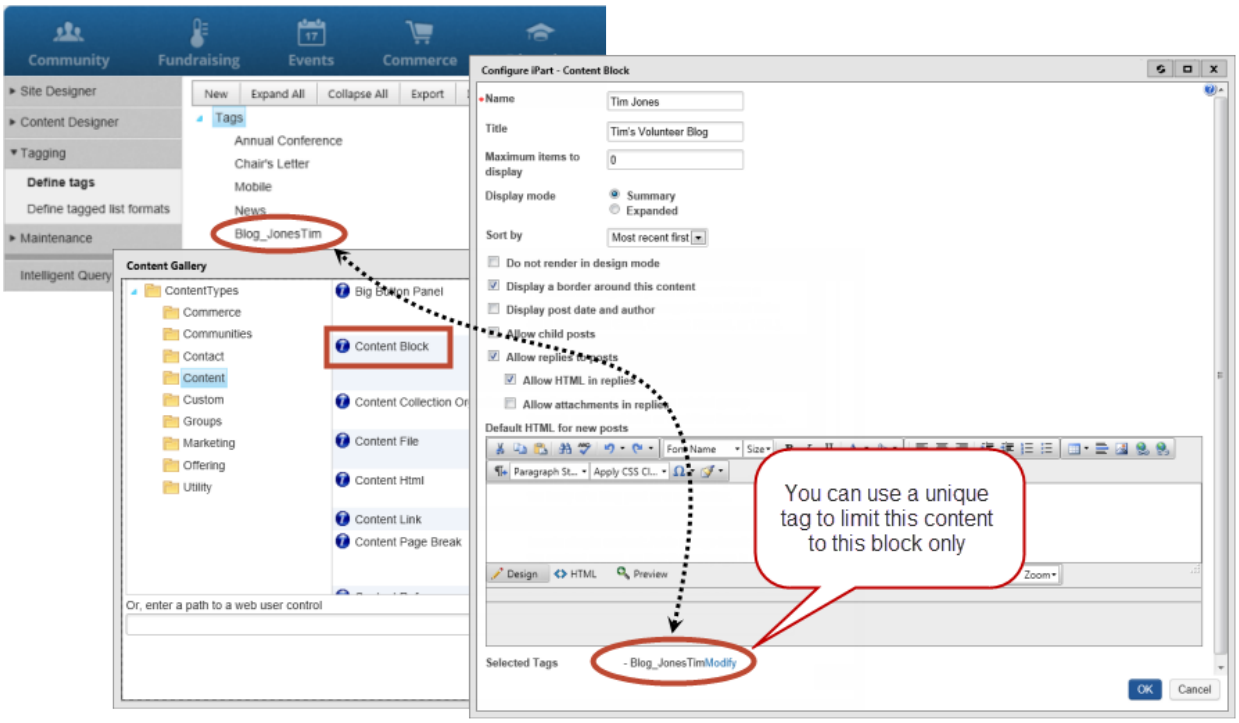
The content created with a Content Block iPart is owned by the Uniform Item associated with the page that contains the iPart. Likewise, the only content displayed is content owned by the page's Uniform Item. The Content Block currently works best with the Group landing page, where it can be used with the Uniform Item for groups. A page's Uniform Item is determined by the iUniformKey parameter passed to the page in the URL.

For example, assume that you have a content record that displays when a user clicks a search result link for a Committee, and it contains a Content Block iPart configured to display content tagged as Announcement. Now a content editor wants to add an announcement for the Planning Committee. After searching for it, he selects the result and goes to the page. The search link sends the iUniformKey for the Planning Committee to the content record through the URL. The Content Block iPart then displays any announcements

(the tag) for the Planning Committee (the Uniform Item). When he adds his new content, it is tagged as an Announcement and is owned by the Planning Committee.

Tagging to filter content

To control what content appears in a Content Block, you create tags specific to ContentBlock Items and apply those tags to specific instances of the iPart. For example, if you want to create a new blog for Tim Jones, you could create a ContentBlock tag such as blog-JonesT, place a new Content Block iPart on a content record, and configure the iPart to display the tag blog-JonesT. Now the content that Tim authors in this blog will be unique to his+ blog, if you do not apply this tag anywhere else:



Content created with anything other than a Content Block iPart will not be displayed, even if it has the same tag. For example, a content record containing HTML tagged with News will not show up in a Content Block that is also using the News tag.

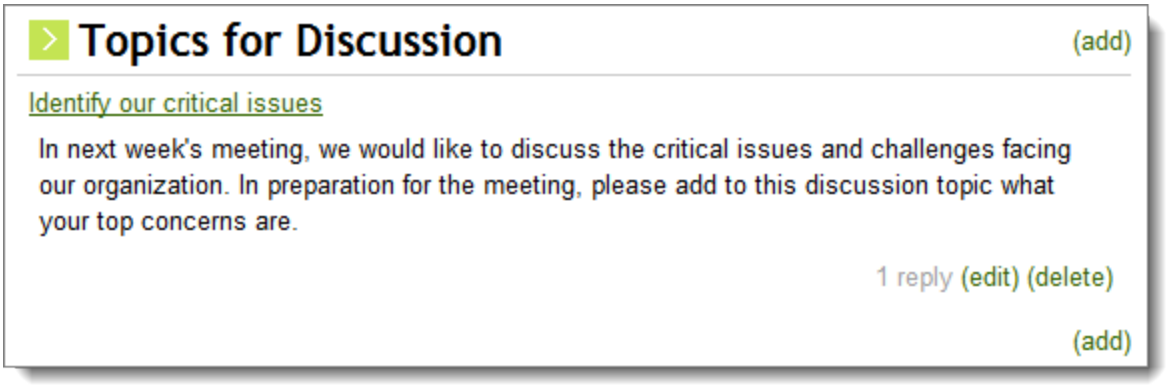
Best practice: Plan for and create the tags you want to use before configuring your Content Block iParts. Content can seem to disappear if you change the tags assigned to a content block already in use, because it no longer matches the tag set currently configured.

Creating a message board

Only users with the Content Editor permission may create posts and children, but any authenticated users can reply to a post and edit or delete their own replies. Any authenticated user may create posts and children, reply to a post and edit or delete their own replies.

To use the Content Block as a message board with multiple posts, child posts, and replies, make use of the following configuration options:

- Maximum items to display - Choose the maximum number of posts that will be displayed; 0 indicates an unlimited number of posts.
- Display mode - Expanded display mode will display replies and child posts in-line, while Summary mode only shows replies and child posts when the post is opened.
- Allow child posts - Allow Content Editors to add a child post to existing content. Allow any authenticated user to add a child post to existing content.
- Allow replies to posts - Allow authenticated users to reply to posts; you may indicate whether to allow HTML and/or attachments in the replies.



Content Block iPart set up as a discussion board

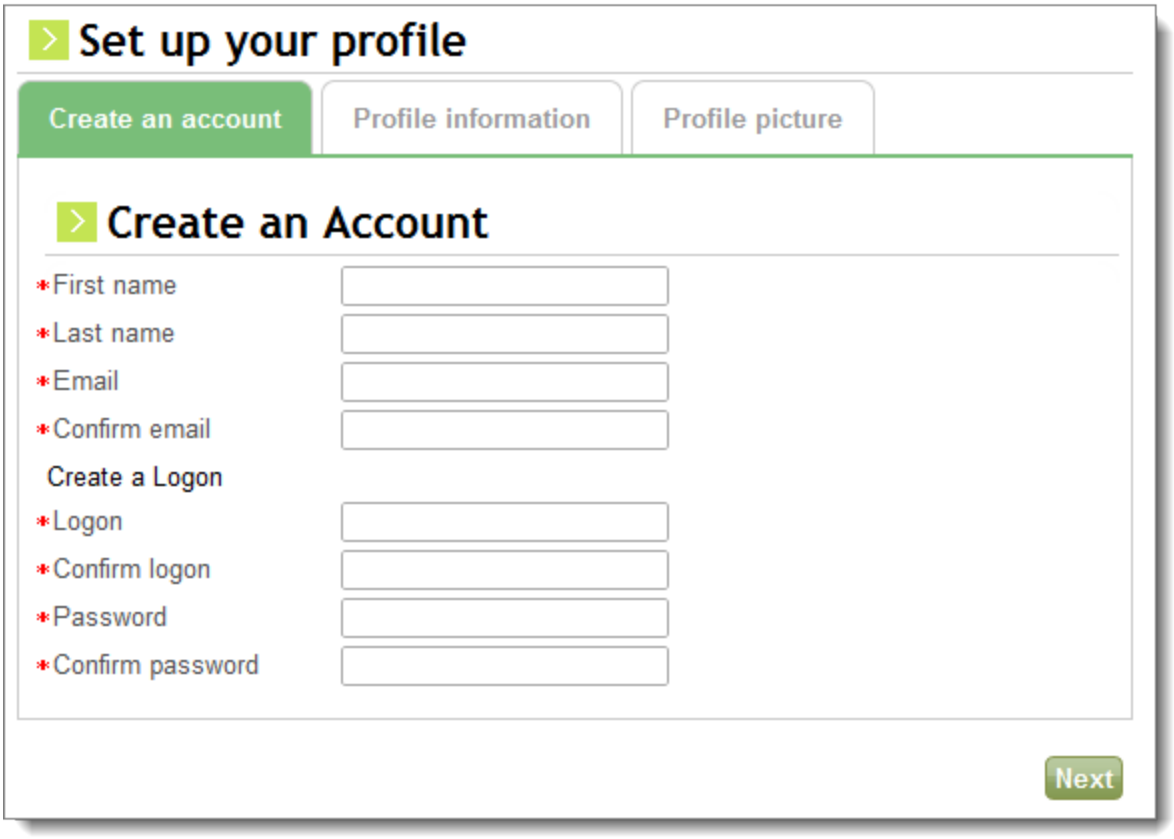
Using the Content Collection Organizer

Use the Content Collection Organizer to create a collection of pages and assign names to the tabs or headers for each page. In the simplest example, those pages are displayed, the user can access tabs in any order desired, and information is saved independently on

each page. The following screenshot shows an example with tabs across the top, configured to display different content pages.

Using the Content Collection Organizer as a Wizard

You can configure the Content Collection Organizer to function as a wizard, which will guide the user through multiple steps. When enabled, Next and Previous buttons display, allowing users to navigate between the steps, as shown below. The user can navigate to any previous tab, but forward only to the next tab in the workflow sequence. The user can also navigate with the browser's Forward and Back buttons, but the data does not commit until the user clicks Next.



Each page in the workflow is validated when the user clicks the Next button. Each iPart's page.Validate method is processed in the order the iParts appear on the page. The order of calls is:

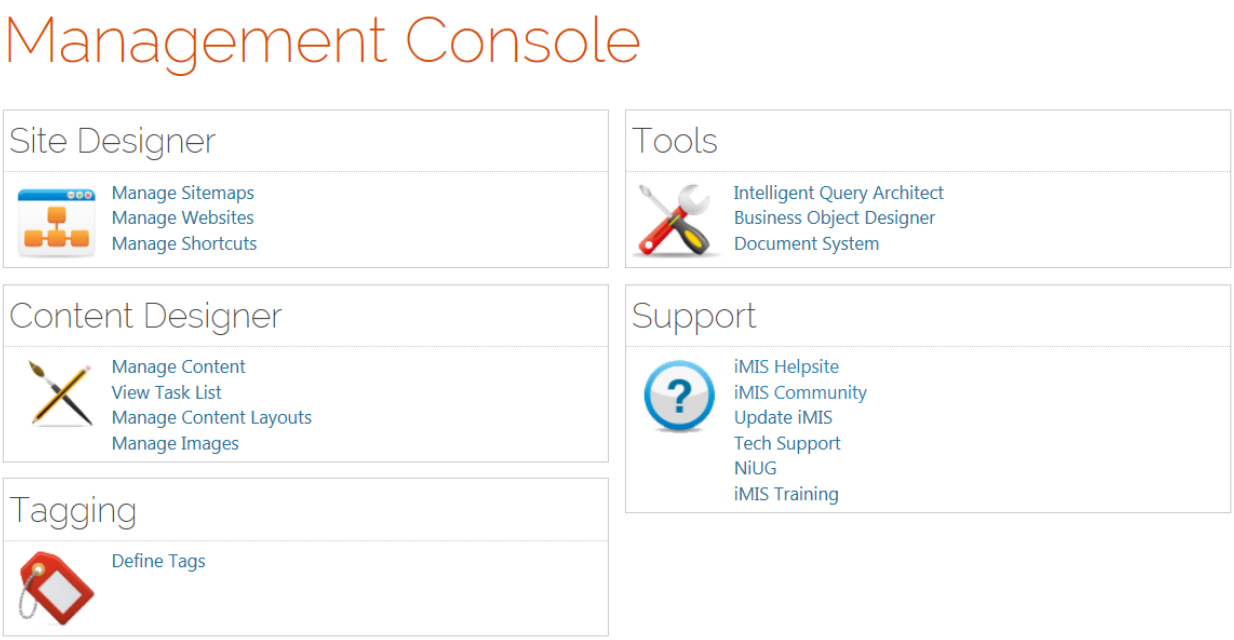
- Validation
- If Validation passes, then PreCommit
- If PreCommit passes, then Commit

If any of the calls fail (the data on a page is incomplete or incorrect), then an error message displays and the user cannot move to the next step until it is corrected.

Using the Big Button Panel iPart

With the Big Button Panel iPart, you can display a navigation panel that combines a larger, category-defining image with a list of links, as shown in the screenshot below. You

can also use this iPart to create links that make it easy for staff to perform routine tasks for contacts such as running reports, registering for events, and ordering on their behalf.



Example: Working On Behalf Of contacts and running reports using the Big Button Panel

In this example, we will set up the Big Button Panel on the account page, so that staff can select a contact from the Directory, then quickly run a report, register for an event, make a donation, or order a product for that contact.

1. Edit the account page that displays after a staff user selects a contact from your directory. In the Member site, it is the Account Page Staff content record.
2. Add the Big Button Panel (add content > ContentTypes > Content > Big Button Panel) iPart to the content record and configure it with the following settings:

- Mode: Actions
- Add an action link to run a report:
- Link Text: Print Info
- Link Target: Enter a link to a page that contains the SSRS Report iPart that displays a report such as $/Samples/ReportingServices/MemberProfileQuery_Report.

Note: The SSRS Report iPart must be configured to Hide the parameters section and to enable the option to Inspect query string for parameters. Do not enable the option to Inspect Session for parameters. For more information about SSRS reports, see Creating SSRS reports.

- URL Parameter: ContactKey=@SelectedUser
- Add an action link for event registrations:
- Link Text: Register for an event

  Note: Customize this text for the event you want to register the contact for. For example, Register for the Spring Conference.
- Link Target: Enter a link to the event page
- URL Parameter: EventKey=XYZ (replace XYZ with an event code) EventKey=XYZ (replace XYZ with an event key)
- Use On Behalf Of: Enable
- Add an action link for donations:
- Link Text: Make a donation
- Link Target: Enter a link to your donation page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable
- Add an action link for the shop:
- Link Text: Purchase a product
- Link Target: Enter a link to your Shop page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable

3. Save and Publish the account page.

Using the Group List Editor iPart

The Group List Editor provides a flexible tool for you to display and manage lists of groups, sub-groups, relationships, and/or memberships. You can configure it to serve several different purposes.

Display an organization's roster

A common use for the Group List Editor is to display a list of contacts that belong to an organization.

For example, add the iPart to an organization's profile page, so that the iPart displays memberships for the selected organization. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the roster
- Clicking on a contact opens their profile page: Enable to link contact names directly to their profile page
- Provide option to view and edit membership details: If you want users to have easy access to both the account pages and the Group Member Detail window, also enable this option. Users can click an icon to switch between these options.
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups owned by the parent ID and their members
- Choose the group types to include: Organization
- Automatically create a group if one does not exist: Enable if you have allowed editing (this allows the creation of new rosters)
- Group owner type: Party
- Group type to auto-create: Company
- Choose the group types to include: Ensure that Company is selected

Display a contact's memberships

Another common use for the Group List Editor is to display a list of a contact's memberships in groups such as committees and chapters.

For example, add the iPart to a contact's profile page, so that the iPart displays memberships for the selected contact. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the contact's memberships
- Clicking on a contact opens their profile page: Not applicable
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups that the parent ID is a member of
- Choose the group types to include: Select the group types you want to display, such as Chapters and/or Sections

Relationships in the Group List Editor

You can easily create a link between two contacts using the Group List Editor iPart. The relationships you define show up on the record of both contacts, and you can specify roles for one or both of the contacts. For example, if you edit Jean Smith's record to indicate that she knows Russell Smith, then that relationship will also appear in Russell Smith's record. Alternately, if you edit Jean's record to indicate that Russell is her child, you can also specify that her role is the parent of Russell. Then Russell's record will reflect that Jean is his parent.

There is no limit to the number of relationships you can create or the types of relationships you can create. We have provided a few relationship types out-of-the-box, but you can add additional ones if needed.

Only users with System Administrator or Staff privileges can create relationships between contacts, but any user can view a list of relationships.

Note: To use this relationship feature, you must have the RELATION license.

The following sections walk you through how to create relationship types and how to set up the Group List Editor to display relationships.

Creating relationship types groups and roles

Edit the Customer setup table for Relationship types, adding the relationships that you want to have available in the Group List Editor. For each relationship type you add, you can also define a Reciprocal relationship, which the Group List Editor automatically populates as a set (such as for Parent and Child).

To display and edit relationships in the Group List Editor, you must define a Relationship Group and Roles (relationship types) associated with that group. A sample relationship group type named Connections has been provided. You can create your own group type from Setup > Groups > Types. If you create your own group type, the only requirement is that you select the Relationship Group checkbox, so that the Group List Editor can properly display relationships.

To create Roles used in relationship groups

1. Decide which relationships you want to be able to define for users. For example, Parent-Child, Husband-Wife, etc.
2. Create Roles for each relationship type.

- From Setup > Groups > Roles, click add.
- Enter the Name of the Role and a Description of the role.
- Select the Active checkbox.
- (optional) Select a default Reciprocal Role for this role. For example, if you are creating a Parent role, you may consider selecting Child as the default Reciprocal Role, so that it is automatically selected when someone defines a Parent relationship. If the Reciprocal Role you want to add is not in the list, create it first, then add it to this role.
- Save and repeat for each relationship role you want to define.

3. Edit your relationships group (for example, the group Connections) to add the roles you have defined.

To set up the Group List Editor to display relationships

1. Add the Group List Editor iPart to a content record on which you want to display a list of a contact's relationships. For example, add it to an account page. The iPart displays a list of relationships for the currently selected contact. The selected contact is determined by either a contact ID passed to the page via a URL parameter (from the Directory, for example), the contact selected in the On Behalf Of control, or the currently signed in user.

   Note: For help adding iParts, please see Creating Custom Panels of Data.

2. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit relationships
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Both of the above
- Automatically create a group if one does not exist: Enable
- Group owner type: Party Choose the group types to include: Select Relationships
- Group type to auto-create: Select a relationship group, like Connections
- Choose the group types to include: Ensure that Connections is already selected.

  Note: Only the relationship group type selected to auto-create may be edited. For this reason, if Allow editing is selected, we recommend including only the one relationship group type in this instance of the iPart.

3. Save and Publish the content record.

Using the Content HTML iPart

Using the Content HTML iPart, you can add simple content to your website, anywhere you want. In addition to the WYSIWYG functionality, you can switch to HTML mode to insert JavaScript to embed other sites, display web widgets, and use variables to create relative paths.

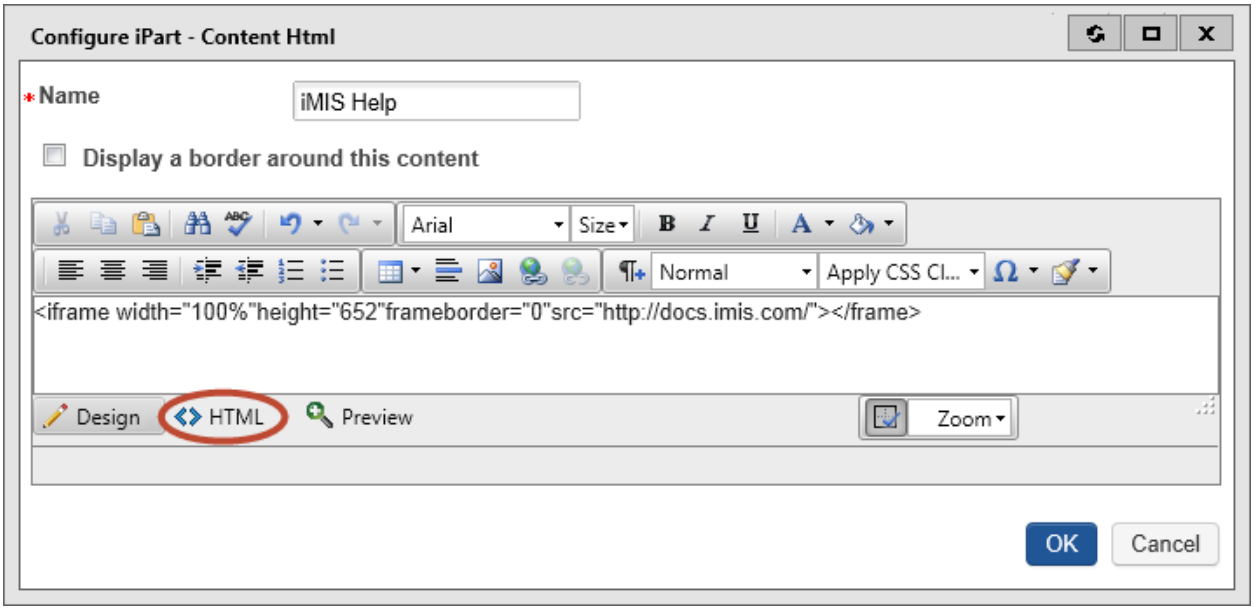
Embedding external sites

To embed any external page into an iMIS site, you can use an <iframe> like this:

1. Go to Content designer, Manage content and create a new content record.
2. Select add content and place a single Content Html iPart on it (from the ContentTypes folder).
3. Show the source by clicking the <> HTML tab and type in an iframe tag, such as this:

   <iframe width="100%" height="652" frameborder="0" src-c="http://docs.imis.com/"></iframe>

4. Go to Tools > Site designer > Manage sitemaps and create a new navigation item that points to the new content record.
5. If appropriate, restrict the navigation item's Access Settings, such as to Authenticated User Full Control.



Displaying web widgets

You can install and display JavaScript-based web widgets (plugins, gadgets) in your WCM-generated websites using the Content HTML iPart. A web widget is a small pro-

gram that your users can execute within a web page and that can provide a wide range of functionality.

For example, Google Gadgets offers thousands of free web widgets including mini applications, games, news feeds, maps, and a wide range of other types of content. Many other websites also provide free widgets that can access data from their site. For example, Twitter provides widgets that let you display Twitter updates on your website. LinkedIn provides plugins that display information such as company profiles, member profiles, and links to share on LinkedIn. You just have to search the web to see what you can find that meets your needs.

Warning: Only embed widgets from authors whom you trust. Malicious code may damage your computer or violate your privacy.

To add a JavaScript-based web widget to a webpage

Go to Content Management > Content designer > Manage content:

1. Create a new content record or edit an existing one.
2. Click add content to find and select the Content Html iPart.

   The Configure iPart window opens.
3. Click < > HTML to switch to HTML mode.
4. Copy the JavaScript embed code for the widget you want to add and paste it into the HTML area.
5. Click OK, then Save and Publish your content record.

   The widget is displayed when that content record is rendered on a webpage.

Creating relative paths using variables

The Content HTML iPart does not support the use of the ~/ (tilde slash) shortcut, often used to automatically build the correct paths when a control is rendered in different domains. However, several variables are available in this iPart that allow you to enter

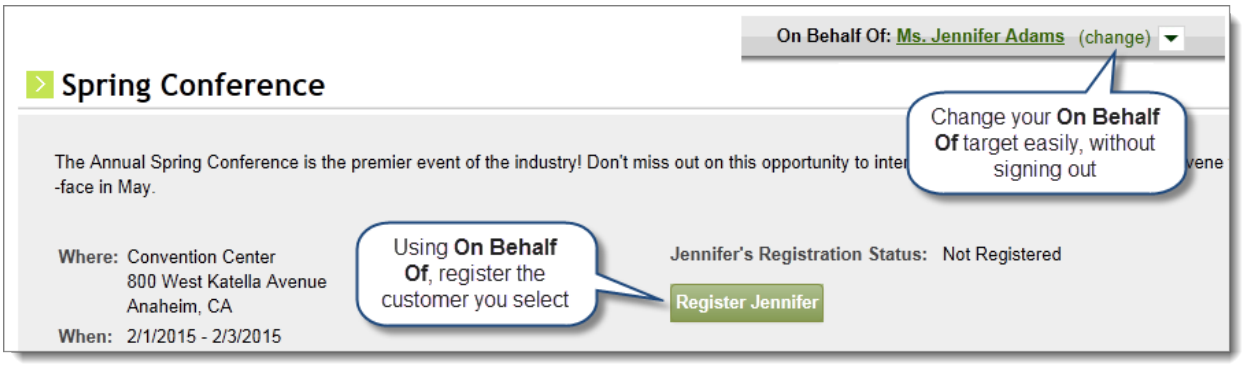
paths for links and resources that are automatically resolved to various folders in your website. The variable names are case-sensitive.

Note: Images do not render in Design mode because the variable is not transformed until the content record is published.

- [Website] – Resolves to the root of the website and contains the website name. Example: [Website]Home.aspx.
- [~] and [Root] - Both variables resolve to the root of the website. Example: [~]Home.aspx resolves to http://mydomain/Home.aspx.
- [Theme] - Resolves to the website's theme folder. Example: [Theme]images/image.png. This variable can be used to access theme resources such as images and CSS.
- [iMIS] - Resolves to the iMIS directory of the website. Example: [iMIS]ContactManagement/CreateAccount.aspx
- [Common] - Resolves to the AsiCommon directory of the website. Example: [Common]Controls/Shared/FormsAuthentication/Login.aspx

On Behalf Of: Customer service mode

Your iPart-based site is not just for self-service: On Behalf Of gives your staff a customer service mode, to complete website commerce on behalf of your customers. When requests for event registrations, product orders, and even membership renewal payments come in by phone, fax, or email, On Behalf Of lets you conduct a secure session during which you can add items to a customer's cart and complete the transaction for them, all without signing out of your own session.



Separate carts, for privacy

To avoid confusion and to protect your customers' privacy as to which items they may have added to their own carts, On Behalf Of sessions create and save carts that are completely separate from those your customers see. For added security, items yet to be purchased are saved in these carts, but not any cardholder information that may have been entered.

For example, if you added a registration to a member's cart but do not submit it, then she will not see the registration in her cart the next time she signs in; however, when you return to registering her on her behalf, you see her cart restored to the state it was in when you left it. Once you complete a purchase on her behalf, both she and you can see the order through her account page.

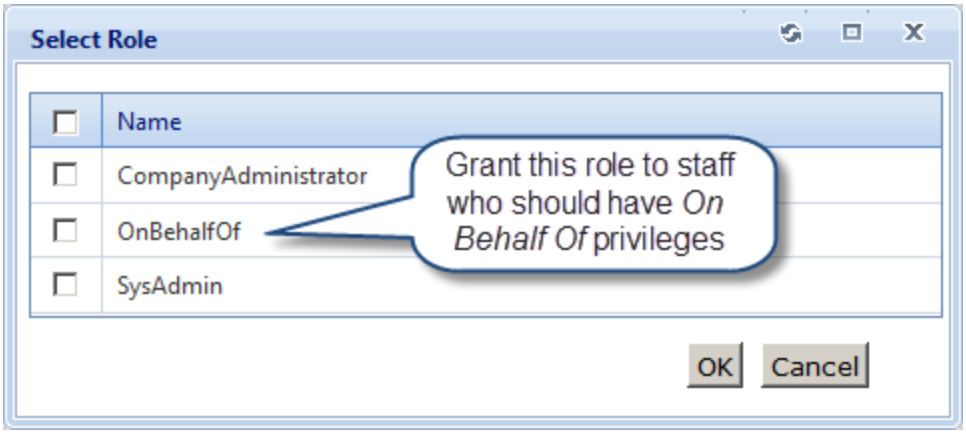
Tip: You can use the audit trails to track which logged-in user performed each action that affected an On Behalf Of transaction.

Who can act On Behalf Of?

To protect the security of contact data, users must be added to the security role SysAdmin or OnBehalfOf to perform actions on behalf of another contact (individual or organization). It is easy to give a staff member On Behalf Of privileges.

Go to System Setup > Security administration > Users:

Find and select a user, and in User Information click add role.



Changing and ending On Behalf Of

When you act on behalf of someone else, all of your commerce-related actions pertain to the target contact until you end the session in one of these ways:

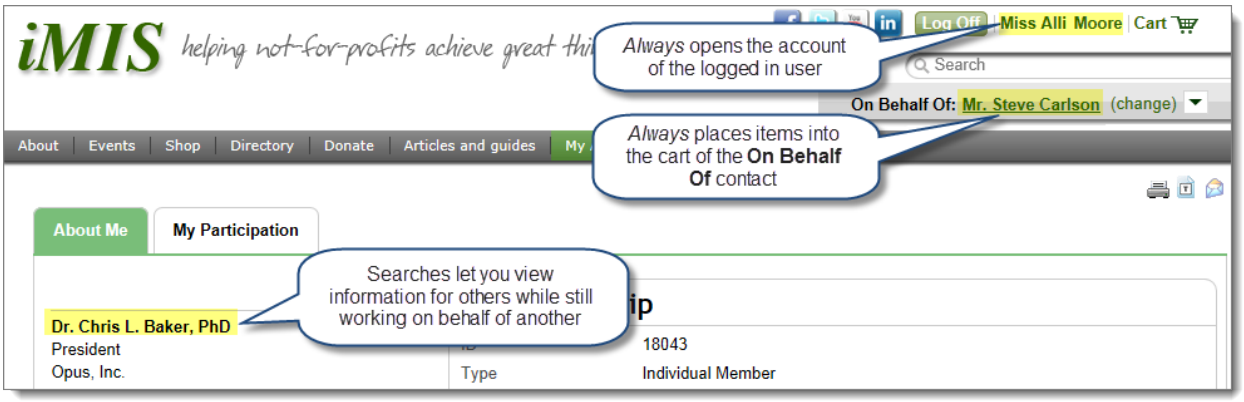
- Select a new target contact: click (change) next to the target contact.
- Clear the selected contact: click the down arrow next to the target contact and select Clear.
- Close the browser.
- Sign out of iMIS.

Whose contact information do iParts show?

Acting on behalf of another contact controls the current cart, but it does not keep you from getting to information for other contacts. An iPart determines whose cart and information to show and update based on this logic:

- If the link's URL specifies an ID (such as for search results), it shows information for that contact.
- If not, it shows information for your On Behalf Of contact, if appropriate. (For example, the Query Menu iPart runs queries regardless of the target contact.)
- Without On Behalf Of, it shows information for you, the logged-in user.
- If no one is signed in, it shows limited information.

For example, you could be working on behalf of one contact when you need to use the Directory to look up an address for another. You can drill down on information from those searches with no effect on your on-behalf-of contact: the iParts pass the queried contact's ID on the URL to show you the information you need. Only when you take actions that add items to the cart is On Behalf Of enforced.



Tip: What never changes is the contact name link in the top navigation: it always shows information for you (the logged-in user).

iMIS

Working with Content

iParts are the foundation of your iMIS sites that you build with RiSE. This section helps you to understand and master the critical iParts that present attractive and dynamic content to your users.

What are iParts?

An iPart is an iMIS-specific web part that represents a building block of features that you can place on a content record with other building blocks to create new pages of features. Multiple iParts can be combined and displayed in a content record as you prefer.

Default iParts appear throughout iMIS. You can modify them for your needs and you can reuse iParts throughout the system. For example, an iPart displaying a roster for a Membership Group can follow the same user behavior patterns as an iPart for a roster in Events.

Where can I find and use iParts?

To create a new web page containing one or more iParts

1. From RiSE > Content designer > Manage content, create a content record.

   Note: For a detailed explanation of creating a content record, see Managing Content.

2. Click add content and select the desired iPart from the Content Gallery.
3. Enter the applicable information and select the desired options.

   Tip: The iPart reference guide|topic=iPart Reference provides a detailed list of configuration options for each iPart.

4. Click OK.
5. Click Preview to see how the content will be displayed to users.

6. Click Save and then Publish.
7. From RiSE > Site designer > Manage sitemaps, create new website navigation.

   Note: See Defining Sitemaps|topic=Defining sitemaps (navigation items) for more information about creating navigations for your site.

   Note: If no owner is specified for the content block, the default organization displays as the owner.
8. Click Publish.

   To add an iPart to an existing webpage

   All iMIS sample sites come pre-filled

1. From RiSE > Content Designer > Manage Content, select the site you'd like to add the iPart to.
2. Select the Content area in which you would like to place the new iPart.

   For example, if you would like to add a new iPart to the home page, select Home from the content area list.
3. Click Edit.
4. Determine where you would like to place your new iPart, and click add content.
5. The Content Gallery window will pop up. Navigate to the folder that contains your desired iPart.
6. Select the desired iPart and click OK.
7. Configure the iPart by entering applicable information and select the desired options.

   Tip: The iPart reference guide|topic=iPart Reference provides a detailed list of configuration options for each iPart.
8. Click OK.
9. Click Preview to see how the content will be displayed to users.
10. Click Save and then Publish.

To set up a user content area

User content areas are created by using iParts which can be configured to allow a user to post content on the web. Examples of this user-generated content include forums, message boards, or blogs.

1. From RiSE > Content designer > Manage content, create a content record.

   Note: See Managing Content for details.

2. Select the Content Block iPart from the Content Gallery.
3. Enter the applicable information and select the desired options. See the help file for details.
4. Click OK.
5. Add additional content to page, if desired.
6. Click Save.
7. Click Publish.
8. From RiSE > Site designer > Manage sitemaps, create a navigation.

   Note: See Defining Sitemaps|topic=Defining sitemaps (navigation items) for details. Note that if no owner is specified for the content block, the default organization displays as the owner.

9. Click Publish. The page displays as configured with an area dedicated to user content entry directly on the page.

Configuring iParts

iPart configuration allows you to:

- Define how the iPart will behave
- Control how much access you want end users to have

- Hide configuration details from end users; two instances of the same iPart with different configurations can appear as two different controls to the end user
- Examples:
- Allow users to edit on a staff-facing site, but display the data in read-only mode on a public-facing site
- Use multiple instances of an iPart on one page to access different sets of data

Note: a detailed list of configuration options for each iPart is available in the iPart Reference guide.

Run-time versus design-time

iParts have two different views:

- Design-time view: What you see in a content record when you add an iPart and configure it.
- Run-time view: What your end-user sees when viewing the iPart within your website. This may differ from what you see in the Design-time view, because some iParts have a different behavior after you publish the content.

Specifying commit sequence

If you place more than one iPart on a page, you might need to specify the order in which actions occur on that page. The commit sequence function allows you to explicitly define the execution order of multiple iParts in a content record.

You can define a commit sequence value for the processing order of each iPart relative to the other iParts in the same content record. The commit sequence value must be zero or greater. iParts with a value of zero (the default) are processed after any other iParts with a non-zero commit sequence value that are in the same content record.

Setting a commit sequence is only required in a few scenarios and is noted in an iPart's configuration help if needed.

Troubleshooting iPart errors

Occasionally, an iPart may fail. However, it will fail gracefully in place, without disabling the whole page. Typically, a “problem loading” error results from some kind of bad data. By default, iMIS hides the error details:

The settings controlling this error logging reside in the <log4net> section of your site’s web.config file. The default settings enable error logging in the Windows Event log and comprehensive logging in the ASI log file, which captures both errors and warnings. This log file, Asi.WebRoot.log, is in the folder above your website root.

Contact your hosting administrator if you need access to information in these logs.

Security for iParts

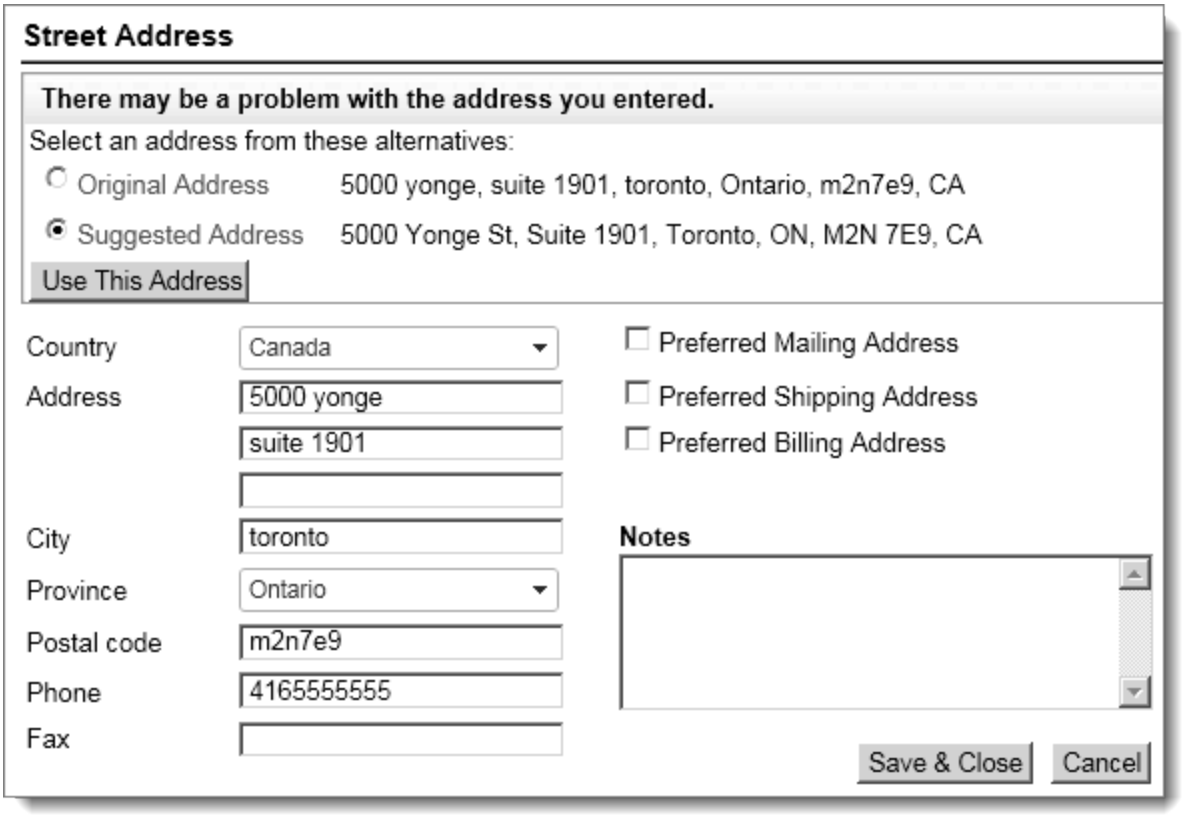
Most security is defined at the content record level within iMIS. You can choose that different iParts display for different users. For example, an unauthorized user might see the description of a Special Interest Group, but a signed-in member might see the roster for the group and a staff person might have the privilege to add, edit, or delete the group.

Address verification for iParts

iMIS SOA can perform real-time address verification using web services hosted by ASI. There are several benefits to this:

- Running this verification through the ASI web service frees you from having to install and maintain these data files locally.
- Offloading verification to this service keeps it from adding to the processing load of your page.

- The services of different address providers can co-exist, making it possible to verify addresses across multiple countries.
- The service can support future verification of collections of addresses as well as single ones.
- Postal addresses entered in the Contact Account Creator and Contact Address Editor iParts automatically upload to this service that verifies and standardizes the address. Users can then either accept the suggested address or keep the original as it was entered.



The countries supported by this service are subject to change. Contact your AiSP to obtain an up-to-date list.

Passing URL Parameters

Many iParts allow you to change the content they display based on the value of a URL parameter. This gives you the freedom to create a single content record. This record can

be reused and the display can be changed based on a value sent in a link to the page. For example, instead of creating a new content record for every event, you can reuse a single content record that displays different event information based on the EventKey value in the URL.

Parameter values are passed to iParts from a several types of sources:

- Search result links
- IQA query links
- Navigation items
- Relative links
- Absolute links

For any iPart that allows URL parameters to be passed, see the configuration help file for detailed instructions.

Tip: If multiple values are sent to a page for a single URL parameter, the first parameter value wins. For example, if the URL pointing to the Event Display iPart is http://my-org/Events/Event_Display.aspx?EventKey=SPR12&EventKey=FALL12, only the SPR12 event displays.

Note: URL parameters set by navigation items cannot be manually overridden in the URL. A user cannot change the parameter value in the URL to display different content.

iPart Examples

iParts can be used in a variety of ways, and in many different combinations to meet your organization's needs. This section contains examples of commonly used iParts and provides guidance in maximizing their benefits.

Displaying query results in iParts

The iParts described in this section use IQA queries to drive the data displayed to users. Each iPart provides a unique way to display the data.

Query Chart Viewer iPart

The Query Chart Viewer displays query results in a chart, which can be set to a range of sizes, skins, and chart types.

Designing queries for Query Chart Viewer

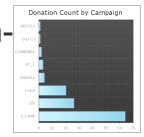
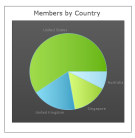
The Query Chart Viewer can render any existing query, but you will get the best results by following these guidelines on how to design queries specifically for use with this iPart:

- Queries: The queries you create for the iPart should be structured so that the results are appropriate for charting. For example, if you want the chart to display the total sales per salesperson, then the source query should be written using the Sum function in IQA.
- Query Display Columns: Each property you select on the Display tab in IQA is available in the iPart's configuration page as a Data column display option. Note, however, that you can only select two properties to be displayed in the iPart.
- Aliases: In your source query, enter an Alias for the Display properties you plan to show in the iPart. Relying on the default labels may not be sufficient, especially when your query uses multiple joined sources or custom SQL expressions. If the query does not display as you expect, using an Alias often resolves the issue.
- Sorting: You can sort the query results displayed in your chart in ascending or descending order. To sort your results, edit your source query and, from the Sorting tab, add the property to be sorted.
- Labels: The labels on your chart's x-axis may overlap if there are too many data points or if the labels are too long. You may be able to improve the display through a few methods. In the iPart, you can expand the width of the chart or change the label angle. In the query, you can try to reduce the number of data points.
- Dates: For dates to display correctly, you must cast them as float data types with an offset of 2. You can do this in IQA from the Custom SQL Expression section of the (Display tab). For example, if you want to display the OrderDate property in your chart, add the following expression: CAST(OrderDate AS FLOAT) + 2. Then, when you select this property from the Data column list in your iPart, set the Data column format to a date format.

- Integers: If integers display incorrectly in your chart, cast the column to a data type of INT in the Custom SQL Expression section of IQA's Display tab. For example: CAST (Order-Count AS INT).

Chart Types

You can display the following types of charts in the Query Chart Viewer iPart.

Chart Type	Example
Area - Displays data in an area filled with color to illustrate trends. For example, create an area chart that shows a member's giving history over time. Note: You can only display one area of data in the iMIS Area chart.	
Bar - Horizontal - Displays sets of data with horizontal rectangular bars for comparison. For example, create a horizontal bar chart that shows the number of donations received by each of your fundraising campaigns.	
Bar - Vertical - Displays sets of data with vertical rectangular bars for comparison. For example, create a vertical bar chart that shows the distribution of your members across states.	
Bubble - Displays data as a series of bubbles. For example, create a bubble chart to show the total number of function registrations for an upcoming conference. Note: You cannot assign a size value to the bubbles in the iMIS Bubble chart.	
Line - Displays data as a series of data points connected by a line to illustrate trends. For example, create a line chart that shows a member's giving history over time.	
Pie - Displays data in a circular chart divided into sections to illustrate proportion. For example, create a pie chart that shows the proportions of your members by country.	

Query Menu iPart

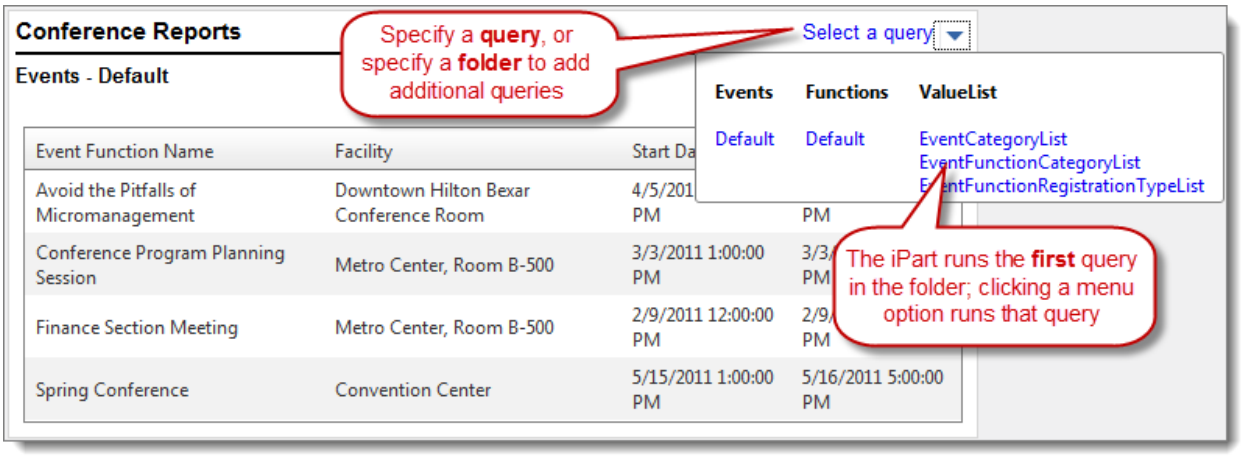
The Query Menu iPart lets you merge query results into your site for tremendous utility. You can set the iPart to display a query, set with whatever title, parameters, columns, labels, and sorting you need, and you can enable exports, which adds icons for sending the data to Word, Excel, PDF, and CSV.

Who is attending?

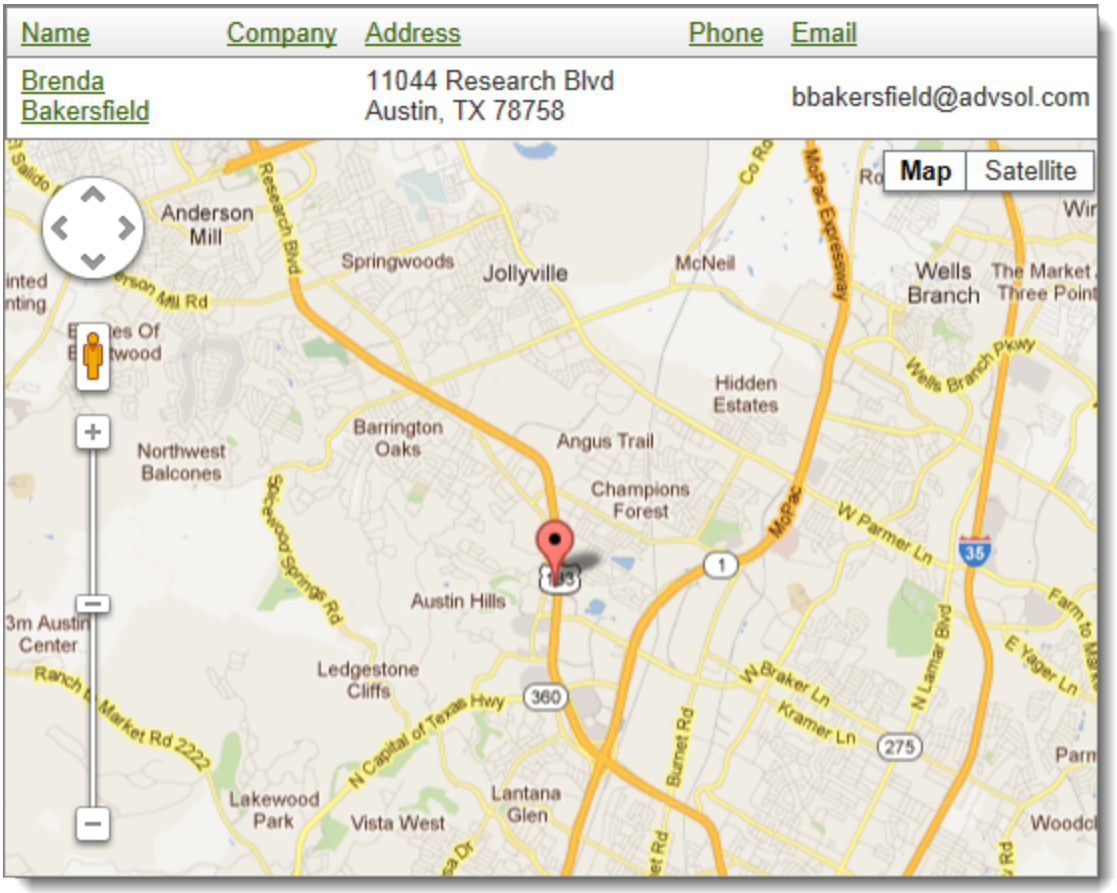
Conference Planning Roster

Registrant	Organization	Title
Hon. Douglas M. Kramer		Representative, State Legislature
Carly L. Kowalski	GEO International	Executive Director
Cecile M. Faciques, CAE	International Association of Business Interests	Director
Charles P. Yusif	International Association of Business Interests	Manager, Education
Steven W. Carlson, CPA	Opus, Inc.	Controller
Sonya Gallora	Publications, Etc.	Executive Officer

You can also organize helpful queries into a folder and point the iPart to that folder. When the page loads, the iPart displays the first query at the top of that folder, and it presents a drop-down menu of additional queries available, organizing them by subfolders, if any. When the user clicks on a query from the menu, the iPart immediately runs that query and displays the results.



If the query selected contains an address property, you can configure the iPart to automatically map the query results when an address is available. Only one address property per query can be mapped. When this option is enabled, the iPart looks for the following address properties in this order and maps the first one it finds: FullAddress, Address, FullAddressText, AddressText, Address Text, and Full Address Text.



Related Items iPart

With the Related Items iPart, you can display a list of profile or product pictures based on the results of an IQA query. For example, you can write a query to display the profile pictures of everyone who has registered for an event, made a donation, or ordered a particular product, or to display products in the same category. You can configure the list to display horizontally or vertically, to display a name for the item, and to choose the size of the image. You also have the option to make the profile picture a live link that opens a URL of your choosing, such as the member profile page.

Guidelines for working with the Related Items iPart

- The pictures displayed in the iPart are based on iMIS product or contact IDs. When creating the query for this iPart in IQA, you must select a property that returns an iMIS product or contact ID on the (Display tab). Give this property an Alias of key_Id (the Alias is case sensitive).
- To define the image to display for each record, include a column in your query that specifies the image file name for that record. Give this property an Alias of Image.
- To display a name for each record, include a column in your query for the name of the item or contact. Give this property an Alias of Name.
- When you add Display columns to the query in IQA, they become available within the iPart as Filter columns to filter on.
- You can dynamically filter the query results displayed in the iPart based on the value of another iPart's URL parameter. For example, you can set up your donation page to display the profile pictures of people that have donated to a particular cause (called a distribution in iMIS). The Donation Creator iPart uses the URL parameter itemid to determine which distribution the donation should go towards. If you add your iPart to the same content record as the Donation Creator, then you can set up the Related Items iPart to look at the value of itemid to determine which profile pictures to display. You just have to make sure that your query includes the CsActivity.Product Code property, so that you can select it as a Filter column on the iPart's configuration page. Once selected, enter

itemid for the Filter on URL parameter, so that the iPart knows to filter the results based on that URL parameter's value.

Example: Display other products in the same category

In this example, the Related Items iPart is set up to display clickable images for other products in the same category as a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

   Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > RelatedItems. Select RelatedProducts.
4. Filter Options dropdown, select ProductCategory. ProductClassKey.
5. Filter on URL parameter, type in Category.Class.
6. For the Items link to (URL or shortcut), type in ItemDetail?iProductCode={key_Id}&Category={ProductCategory}.ItemDetail?iProductID={key_Id}&Class={ProductClassKey}. This uses the ItemDetail shortcut to link each item in the list to the product page. The particular item's product ID and category are specified in URL parameters so that the correct product and related products are displayed in the resulting product page.
7. Click Save & Publish to complete the content record.

   Example: Display other users who have purchased a product

In this example, the Related Items iPart is set up to display clickable profile pictures of other users who have bought a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

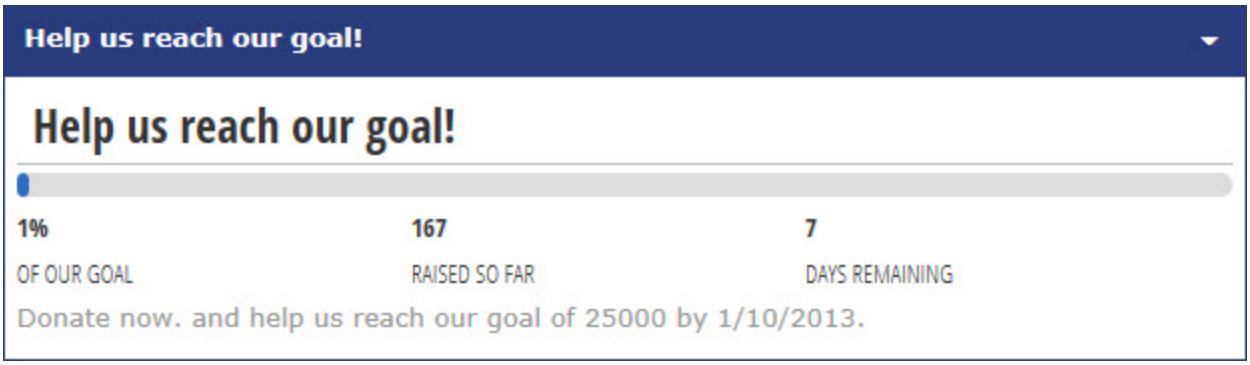
1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

   Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Content Types > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > QueryProfilePictureList. Select Orders.
4. Filter column dropdown, select ProductCode.
5. Filter on URL parameter, type in iProductCode. iProductID.
6. For the Items link to (URL or shortcut), type in MBR/Party.aspx. This redirector web page looks for an ID in the URL parameter and then checks the ID's party type and the user's permissions to determine which content record to display. The user's ID is appended to any URL specified in this field.
7. Click Save & Publish to complete the content record.

Progress Tracker iPart

With the Progress Tracker iPart, you can visually display progress towards a goal based on the results of an IQA query. For example, connect this iPart to a fundraising query, so that your members can easily track the progress of a fundraising effort towards a specific goal. Or connect it to an events query, so that you can see at a glance how many people have registered for an event.



To set up the Progress Tracker

1. Create a query for the Progress Tracker.

   Note: For sample queries that will work with this iPart, see $/Samples/ProgressTracker/ in IQA.

   The Progress Tracker uses three pieces of information supplied by an IQA query: a goal amount, the sum total of what you are tracking, and the end date (which is optional). When you build your query for this iPart, it must contain specific aliases. In IQA, create a new query and choose the business object you want to query on. Make sure you are in Advanced Mode, then from the Display tab, choose properties to assign the following aliases to:

- Goal_Amount: Indicates which property is the goal amount. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST(25000 AS INT) as a property to set the goal amount to 25,000.
- Sum_Total: Indicates which property is the amount to be summed. The percentage displayed in the Progress Tracker is based on this amount compared to the goal. It can be a monetary amount or any other number, such as the number of event registrations.

  Tip: From the Function dropdown list for this property, select Sum, so that only one row is sent to the iPart. This is not required, but it will improve performance.
- End_Date: Indicates which property specifies the end date. This alias is only required if you want to display an end date in the iPart. You can apply this alias to a property of a

business object, or apply it to a Custom SQL Expression property. For example, add CAST('2012-12-25' AS DATE) as a property to set the end date to 25 December, 2012.

2. Add the iPart to a content record and configure it.

   Go to RiSE > Content designer > Manage content:

1. Do one of the following:

- Select a Content Folder and click Edit.
- Select New > Website Content.

2. Click add content.
3. Go to ContentTypes > Utility.
4. Select Progress Tracker.
5. Click OK.
6. Enter the iPart CSS class to style the Progress Tracker. Two styles have been pre-defined that you can use in the iPart: ProgressTracker and ProgressTracker2. You can edit these classes to change the look and feel, or you can create your own style for the Progress Tracker.
7. Select a Source query.
8. (optional) Select a data column by which you want to filter. You can use this feature to dynamically update your Progress Tracker, based on the value passed to it in the URL. If you choose to filter on a data column, then also enter the name of the URL parameter, which the iPart uses to identify the value to filter on. For example, to limit the results of an event query to a specific event, you can select the EventCode property and give the URL parameter a name such as EventCode. The progress displayed will then reflect only the event code which is included in the URL as EventCode=[EventCodeValue].
9. (optional) Enter any messages you want to appear in the iPart. The variables below can be used in the descriptions. For example, "Help us reach our goal of {0} new members by {2}!"

- {0} displays the goal total
- {1} displays the current sum total or count
- {2} displays the end date in a long format
- {3} displays the end date in a short format

10. Select the Caption Options. In addition to the progress bar, you can also display the values as text. If any of the Caption Options are unavailable after selecting a query, this indicates that the required aliases have not been defined in the query.
11. Select the Progress bar location. The bar can be displayed above or below the captions.

    Note: You can also use this iPart to display only a countdown (days remaining to a certain date). In configuration, only select the caption option Display days remaining, then for the Progress bar location, select (None).
12. Click OK.

SSRS Report iPart

The SSRS Report iPart lets you display the results of any IQA query on any page where you place it. The SSRS iPart uses the version 10.0 ReportViewer, which supports IE8 natively and, in IE8, adds a Print button on its toolbar. You can add the SSRS iPart to any content page using CM: open the Utility folder and choose the content type SSRS Report.

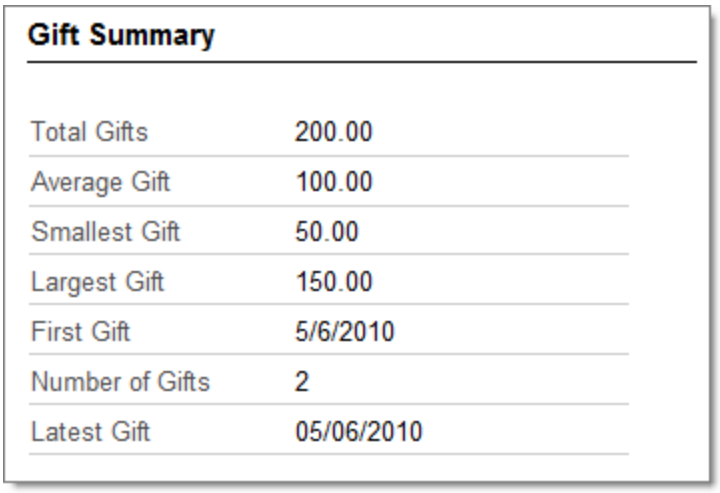
The iPart lets you customize whether to display the export buttons for PDF and Excel versions of the report. You can change the default design (layout, colors, fonts) of your reports by editing the SSRS parameters in the SystemConfig table.

How it works: The process engine specified by the iPart loads a report template (.RDL file) from the document system and creates a report data source (a DataTable) based on an IQA query's SQL source; the report viewer then combines the template and query to generate the report's output. When you configure the iPart, you specify the Document system path to the SSRS Report runtime, which must be a link to an SSRS Process Engine. Click the select link next to the textbox, then browse to your reports (such as $/Samples/ReportingServices), and pick one of the runtime entries.

Tip: Identify a process engine (run-time report) by the arrow on its icon!

Summary Display iPart

The Summary Display iPart displays a single row of query results in a form view.



Gift Summary

Total Gifts	200.00
Average Gift	100.00
Smallest Gift	50.00
Largest Gift	150.00
First Gift	5/6/2010
Number of Gifts	2
Latest Gift	05/06/2010

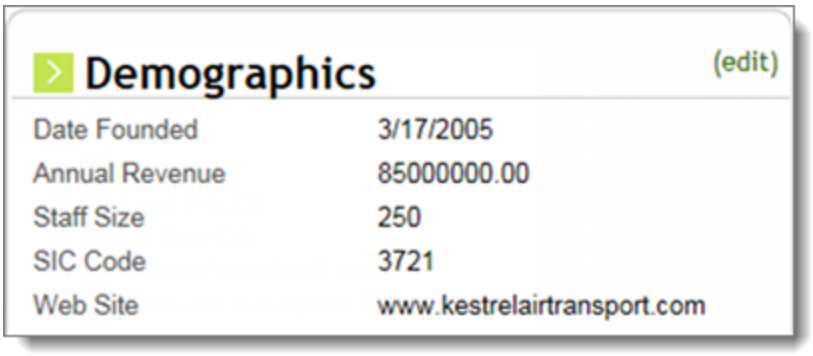
Guidelines for queries displayed in the Summary Display iPart

When creating a query that you want to display in the Summary Display iPart, keep the following guidelines in mind:

- This iPart only displays a single row of query results.
- If you connect the iPart to a query that returns more than one row of results, only the first row is displayed.
- Tip: You can dynamically filter your query results by the currently logged in user, a selected contact, or a date. See Adding dynamic filters to queries for more information.

Panels and custom data

Panels are custom displays of iMIS data that you are able to name, build, arrange in grids, and add to your site. Using panels, your users can browse, edit, add, and delete their data, as you specify:



Panels display within Panel iParts, which allows your users view and edit custom data on the broadest range of browser and platform types that iMIS supports. You can manage your custom data directly and conveniently from the web pages where you place these iParts:

- Panel Editor (which creates panels and shows one panel) --
- Panel Collection Editor (which combines existing panels into tabbed displays)

You can configure the iParts to let your users add and edit that data directly from their browser page. You can import your existing user-defined tables (from iMIS Customizer) directly from the Panel Editor iPart configuration. In addition, your Activity table data is automatically available as a source, so that you can use and extend that data. Panel sources can include existing user-defined tables (defined in the UD_Table table) and user-defined sources (listed in the ObjectMetaData table).

Tip: Panels are shared: when you update one panel, it updates within every iPart that uses it.

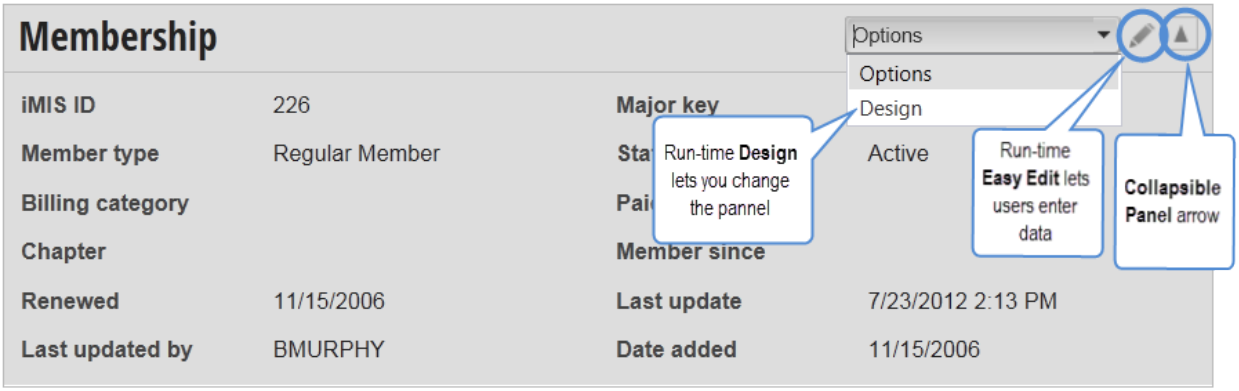
Creating custom panels of data

In a few clicks from your browser, you can have a new panel that displays the data you want, labeled and made editable as you need.

1. Enable Easy Edit by clicking on the button at the top right hand corner of the screen.
2. Once Easy Edit has been enabled, you will find and click the icon at the bottom left corner; this is the Content Designer.

3. From the Content Designer, click add content > ContentTypes > Content > Panel Editor
4. Select (New Panel) from the Panel drop-down menu.
5. Drag in and arrange your desired data, then Save & Publish.

   Once you have placed a panel iPart into a content record and published it, you can then edit the panel directly: As a system administrator, you see a run-time Design command, which lets you make quick changes to the panel, changes that save and publish for you automatically. For extensive panel work, such as to change the type of data it shows, use Easy Edit to access all of the content design features.



   Best practices for panel layout

   Here are key layout features to help you design the best use of screen real estate on the page:

- Multiple columns: Click + or – icons next to the panel layout to add/remove columns in your panel. For best display results, place multi-column panels into single-column content records.
- Hide in Summary View: Check this box on certain properties to trim the initial display of the iPart to the read-only information that is most useful. Only when users open the full window for viewing or adding/editing (as you configured it) do they see the additional information.
- Read-only: Check this box to provide information in read-only form while still allowing users to edit other information on the panel.

Tip: To prevent editing of all of the properties, simply disable Allow users to edit on the iPart Configuration, rather than in the Panel definition.

- Collapsible panel: In order to maximize utility and minimize scrolling on the page, users are able to click on the arrow to expand and collapse iParts.

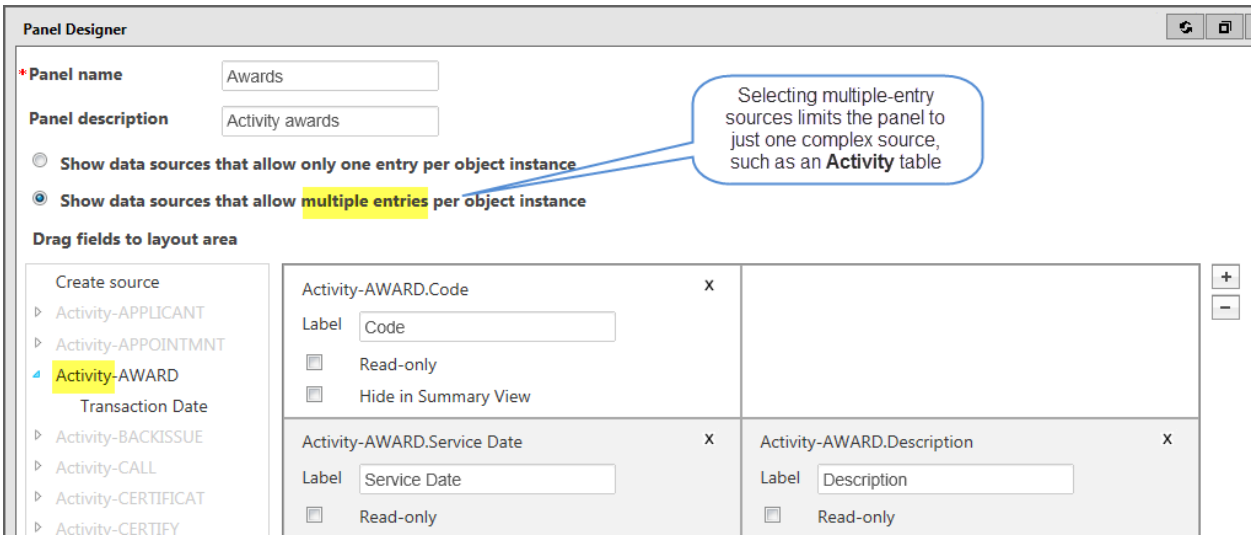
  Tip: Be sure to add an optional Title to any iPart that you make collapsible, so that title bar text guides your users as to what information they will access by clicking Show.

  Panels for Activity data

  Most organizations need to show activity information on their websites. All of the Activity data in your iMIS database appears as complex (multi-entry) sources when you use Panels.

  Suppose you created new award types in the general lookup table called AWARDS and want to add them to a page for dynamic editing. In a few clicks, you can have exactly that:

1. Enable surf-to-edit.
2. Click add content.
3. Go to ContentTypes > Panel Editor.
4. Click OK.
5. In the Panel list, select (New panel).
6. Select Show data sources that allow multiple entries per object instance.
7. Drag in your new data sources.
8. Click Save & Close.
9. Select Allow users to edit.
10. Click OK.
11. Click Save & Publish.



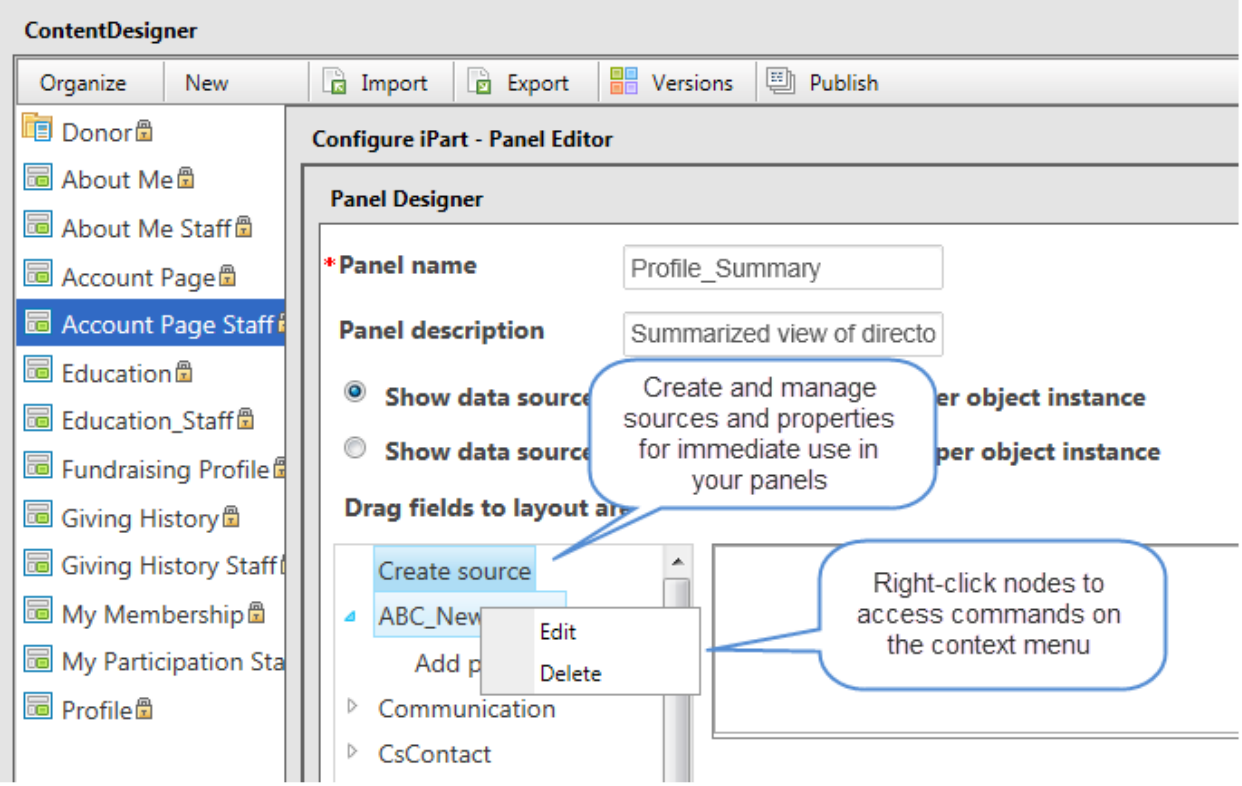
All of your Activity data appears as available sources when you select multiple entries for the type of data source.

Tip: If you want to combine data from different sources, be sure to show simple sources (the first radio button option). Only one complex table can display in a panel, so the others are grayed out as long as any one of them has properties placed in the panel.

Defining your own data with Panel Designer

With the Panel Designer, you can not only craft reusable panels that combine fields from many tables, but you can also define new data structures (business objects and properties) to manage information for your organization. Without special tools or knowledge of the iMIS schema, you can add data sources on the fly, right from your browser. When you save the panel, you have saved your newly created data sources as iMIS business objects.

Tip: You can see your new data source show up as a business object in Business Object Designer, but it will be read-only: continue to edit and manage these special sources in Panel Designer itself.



Access the Panel Designer by editing or creating a panel in a Panel Editor iPart.

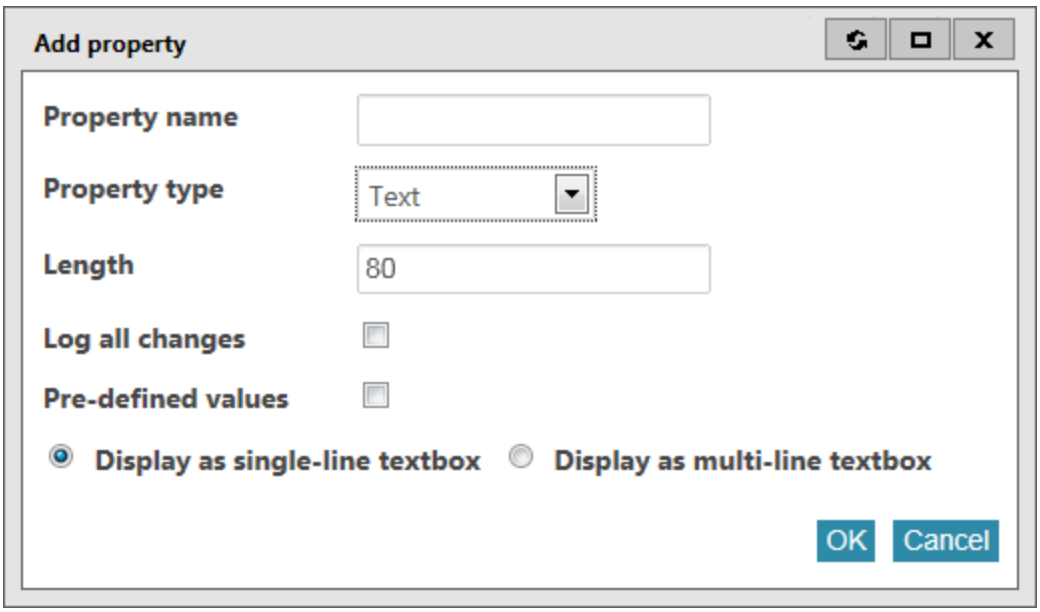
To create a new panel source and properties

To create your own data source with properties, you work within Panel Designer. Each new source you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

1. Select New > Website Content.
2. Click add content.
3. Go to ContentTypes > Content.
4. Select Panel Editor.
5. Click OK.
6. From the Panel drop-down list, select (New panel).
7. At the top of the source tree, select Create Source.

8. Choose a Name for each new Source that meets these criteria and click OK:
   - Starts with a letter
   - Contains only letters, numbers, and underscores
   - Is unique across iMIS, not matching any existing iMIS data or SQL Reserved Words

     Tip: Use an organizational prefix (such as ABC_*) so that your sources are unique, sort together in the tree view, and are easy to identify as ones that you created.
9. Select Add Property for the new source added.



10. Enter a Property Name.
    - Starts with a letter
    - Contains only letters, numbers, and underscores
    - Is unique within its Source
11. Choose a property type that best fits your purpose, within these valid ranges:
    - Currency: 19 total digits (precision), with 4 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Date, Date and Time, Time: January 1st, 1753, through December 31st, 9999

- Decimal: 28 total digits (precision), with 12 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
- Email: Creates a mailto link, which launches the user's default mail application when selected.
- Integer: -2,147,483,648 to 2,147,483,647 (±2 billion)
- Text: By default, the Text Property type allows:
- Free-form entry up to 400 characters (defaults to 80). You can select to display the text-box as a single line or multi-line textbox.
- Pre-defined values from a query or explicit list that display as a drop-down list at runtime:
- Query – For example, you may want to use a query that returns a list of countries.
- Explicit List – For example, you can add a list of colors the user can select as their favorite.
- URL: Creates a live hyperlink, which launches a new instance of the browser to open the link when selected.
- Yes/No: Boolean

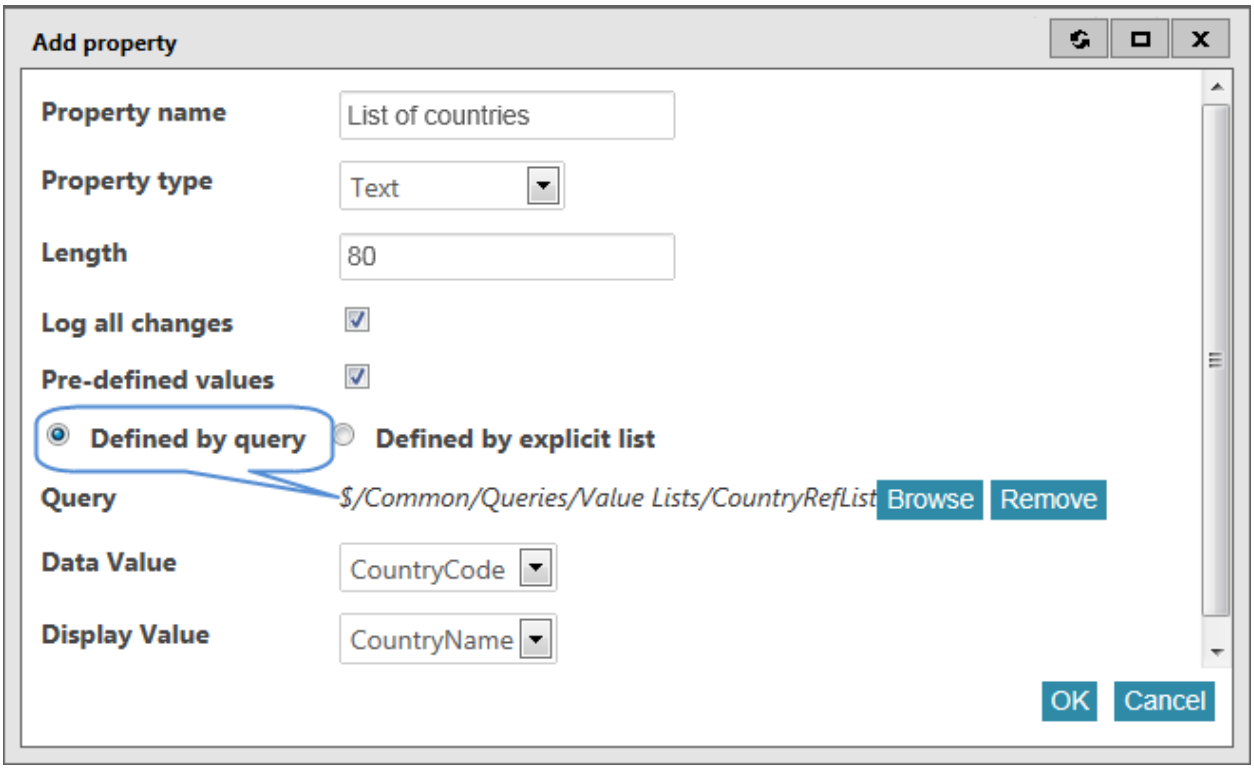
12. Enable the Log all changes if you want to track any data change made to the property you are adding.

    Hint: Add the Change History Display iPart to a content record if you want to display data changes made in the Name and Name_Fin tables as well business objects.

13. (Text Property type only) The Pre-defined values option allows you to present a list from which the user can select.

    - The Query option provides validation-type properties based on the query results. For example, instead of typing out a list of countries, you could select a query that displays country values.
    - Enable the Pre-defined values checkbox and select the Defined by query option.
    - Click Browse, select a query, and click OK.

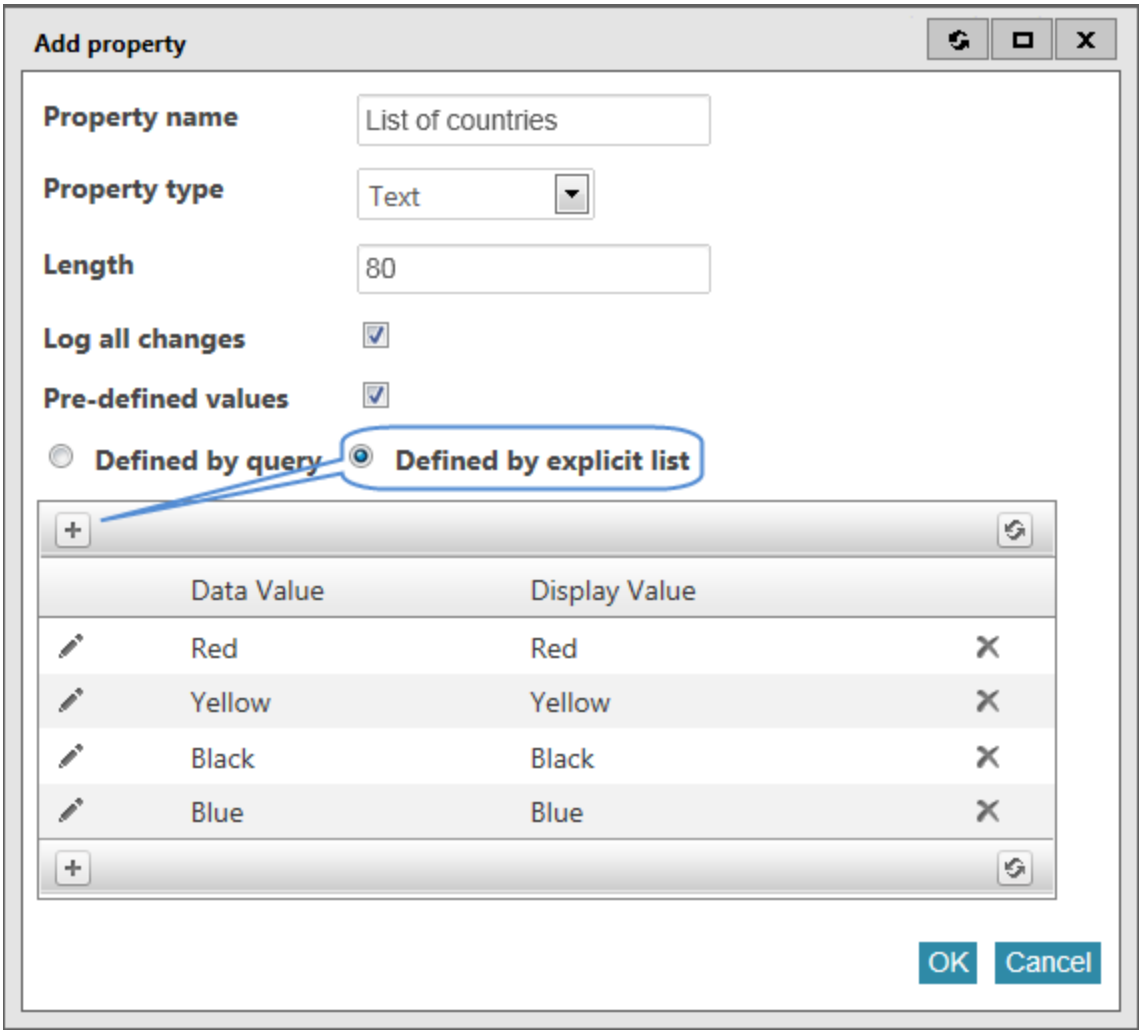
- Two additional fields display, Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel. For example, the country code may not be as clear as the country name.
- Select the fields from the drop-down list in the Data Value and Display Value fields.
- Click OK.



- The Explicit List option allows you to create a list to display on the panel. For example, you may want a user to select their favorite color.
- Enable the Pre-defined values checkbox and select the Defined by explicit option. A table grid displays.
- Click + to add a data row. The data row contains two icons: Insert and Cancel, and two fields: Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a

selection on the panel. While these values can be same, you may want to choose a different value to display on the panel.

- Enter the appropriate values in the Data Value and Display Value fields.
- Click the checkmark located to the left of the data row.
- Click + to add additional data rows.
- Click OK.



14. Drag the field(s) to the layout area.
15. Save the panel to save the source and properties. Once you save a property, you cannot rename it. Note that the sources will alphabetize properly on reopening.

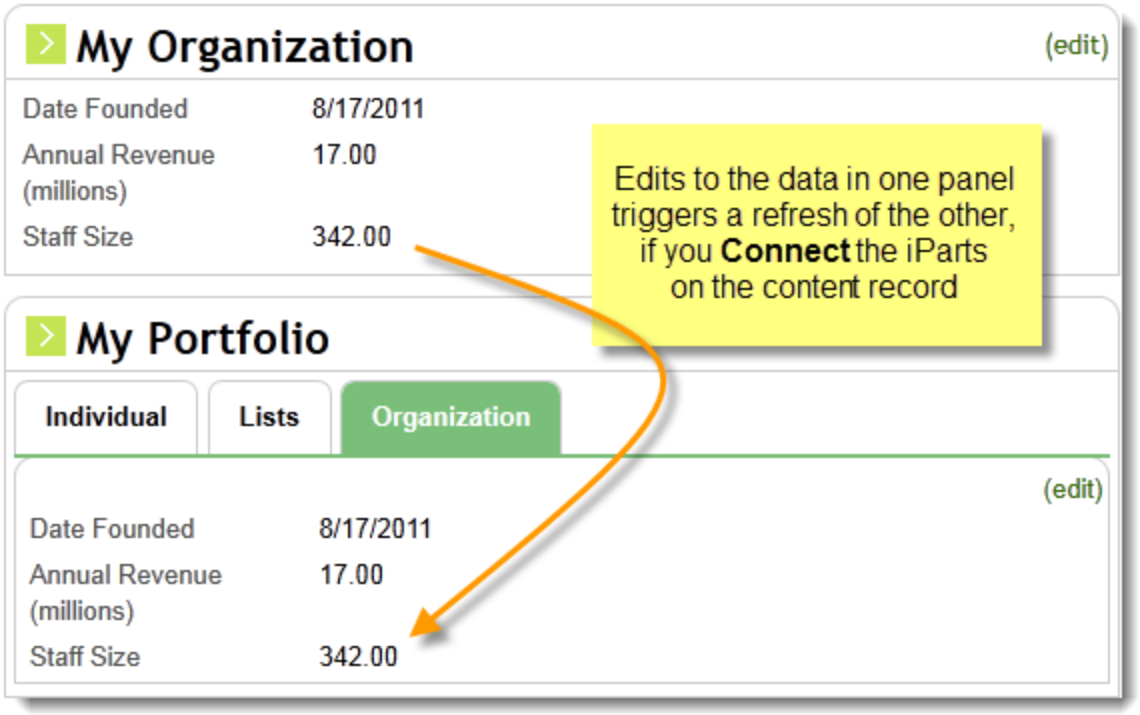
Each new property you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object property is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

Tip: Do not save until you create all of the properties. This way, you can view them as a set of properties and improve your naming convention before it is finalized.

16. Save and close the Panel Designer window.
17. Save & Publish the content record.

Connecting iParts to refresh panels

When you combine panel-displaying iParts on the same content record, data might appear out of sync after the user edits it, if both panels display the same property. You can solve this refresh problem through the iPart's Connect feature, which you enable separately from Configure.



Note: Check an iPart's Configuration Help topic to find out if it supports any connection options. An iPart has no connection support (neither consumer nor provider) unless its author added it.

To connect panels for dynamic updating

1. Edit a content record and add two user-editable iParts that display panels (Panel Editor, Panel Collection Editor).
2. Set up the first connection:

- From the first iPart's title-bar menu, select Connect.

  The Connect box that opens shows you any current connections and lets you disconnect them.

- Select Create a new connection.

  The Connect box that pops up prompts you to create one of four connection types.

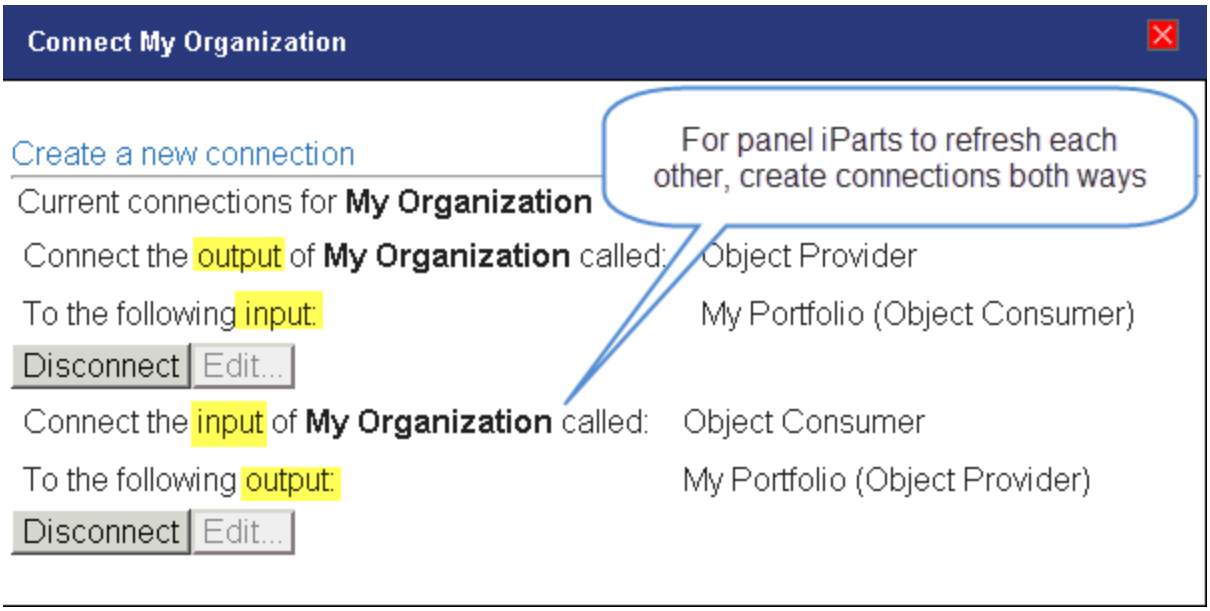
  Tip: Do not be misled by the language of connection. The Consumer is the actor that triggers a refresh on another iPart, and the Provider provides a pointer to itself to the Consumer.

- From the Object Consumer drop list, select the panel iPart you want to refresh.
- Select Connect.

3. Set up the second connection:

- From the second iPart's title-bar menu, select Connect, and select Create a new connection.
- From the Object Consumer drop list, select the first iPart.
- Select Connect.

  You should see a pair of connections, for mutual refreshing.



4. Save and Publish the content record.

Adding existing business objects to panels

Panel Designer lets you create new data sources on the fly, access any user-defined tables, and make full use of the Activity table. It can also display your existing business objects, if they meet these requirements and configuration settings:

Referencing existing business objects

Panel Designer can display existing business objects that have a ContactKey or ID property. When ContactKey or ID is the primary key, Panel Designer treats it as a single-instance table; otherwise, it assumes it to be multi-instance.

Panel Designer cannot display your business objects until you add them to the ObjectMetaData table. While attached to the iMIS database in SQL Server Management Studio, run this SQL statement:

INSERT INTO [dbo].[ObjectMetaData] (ObjectName, RelatedToEntity, IsUserDefined, IsMultiInstance)

VALUES ('MyObject', 'Party', 0, 0)

- Replace MyObject with the name of the business object, table, or view that is related to Party.
- Change the last value to 1 if it is multi-instance.

Settings for Business Object Designer (BOD)

1. In Business Object Designer, edit your object and open the BOD (Properties tab) > (Display tab).
2. To make a property available to your panels, enable its Available to UI? option.

   Tip: To see your BOD changes immediately, restart IIS.
3. To enable multiple selection for a property, select Check box(es) under Display Control so that you can enable the Allow multiple selection? option.
4. To enable HTML editing, select HTML Editor under Display Control. Be sure to use the property in a single-column panel to provide the control adequate width.

   Troubleshooting

   If you get an error when creating a new data instance at runtime (either single- or multi-instance), check that your business object does not have a 'Read-only' constraint set on the ContactKey or ID property's Definition tab.

Connecting picture iParts to Facebook

You can set up the Contact Mini Profile and Contact Profile Picture iParts to prompt people to use their Facebook profile picture in iMIS, instead of uploading a picture. To use this feature, you must do the following:

- Contact your Hosting Administrator to enable Enable the Facebook feature in the web.config file
- Create a Facebook app so that your website can connect to Facebook
- Enable the iPart configuration option to Prompt for Facebook connection

When enabled, signed in users are prompted to connect to Facebook when they edit their profile picture and wherever their profile picture is displayed.

To create your Facebook application and use it in iMIS

1. Contact your Hosting Administrator to request that they do the following: Edit your web-site's web.config file, located by default in C:\Program Files\ASI\imis\net. Find the EnableFacebookApi property, and change the value to true.
2. Create your Facebook application.

- Log in to the Facebook Developers site.
- Click +Create New App.
- Enter an appropriate App Display Name and App Namespace for your organization. Only the App Display Name will be visible to users.
- Click Continue and complete your App creation.
- On the Basic info page for your App, enter the Site URL for your iMIS application.
- Take note of the App ID Facebook has created for you.

3. Contact your Hosting Administrator to request that they do the following: Add your Face-book App information to the required iMIS JavaScript.

- Edit your iMIS Facebook.js file using a text editor. By default it is located in C:\Program Files\ASI\imis\Net\AsiCommon\Scripts\SocialMedia.
- Find the appId value and update it with the ID issued to you by Facebook.

To load the Facebook API

1. Edit your website's master page. By default it is located in C:\Program Files\ASI\im-is\Net\App_Themes.
2. Add the following html within the <body></body> tags of your master page:

To enable the Facebook connection in iParts

Configure each instance of the Contact Mini Profile and Contact Profile Picture iParts used in your website to enable the options Allow picture change and removal and Prompt for Facebook connection.

Note: When the Facebook feature is disabled in the web.config file, the Facebook options do not appear in the Contact Mini Profile or Contact Profile Picture iParts.

Using the Content Block iPart

With the Content Block iPart, you can empower authorized users to create and edit content directly on a page, without using Surf-to-Edit or accessing Tools. Through iPart configuration, you can allow users to insert HTML content, add attachments, create child pages, and submit replies. At its simplest, a content block can be HTML that is read-only unless the user has permissions to see the edit command. At its most complex, a block can act as a message board with multiple posts, child posts, and replies. You can limit the number of posts to a set number, or you can leave it at the default (zero), which lets it grow indefinitely.

Note: for guidance in creating a Content Block, follow the steps outlined in Creating Custom Panels of Data, and select Content > Content Block

How groups own content

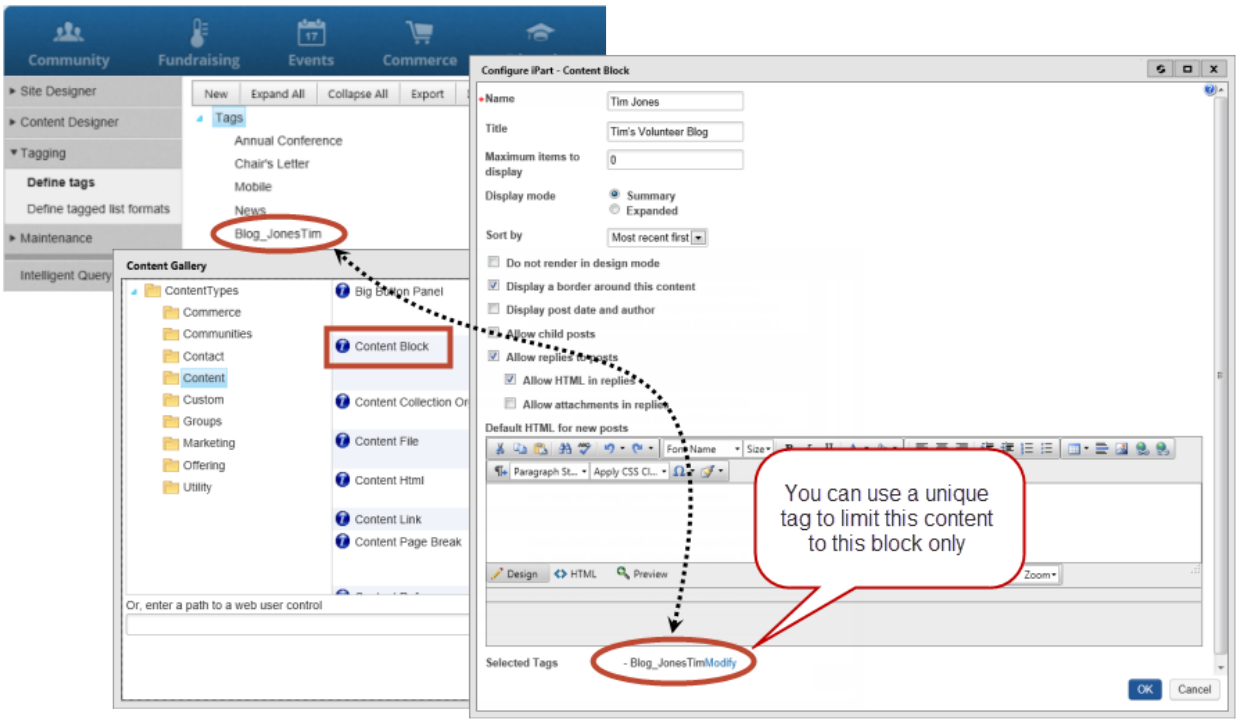
The content created with a Content Block iPart is owned by the Uniform Item associated with the page that contains the iPart. Likewise, the only content displayed is content owned by the page's Uniform Item. The Content Block currently works best with the Group landing page, where it can be used with the Uniform Item for groups. A page's Uniform Item is determined by the iUniformKey parameter passed to the page in the URL.

For example, assume that you have a content record that displays when a user clicks a search result link for a Committee, and it contains a Content Block iPart configured to display content tagged as Announcement. Now a content editor wants to add an announcement for the Planning Committee. After searching for it, he selects the result and goes to the page. The search link sends the iUniformKey for the Planning Committee to the content record through the URL. The Content Block iPart then displays any announcements

(the tag) for the Planning Committee (the Uniform Item). When he adds his new content, it is tagged as an Announcement and is owned by the Planning Committee.

Tagging to filter content

To control what content appears in a Content Block, you create tags specific to ContentBlock Items and apply those tags to specific instances of the iPart. For example, if you want to create a new blog for Tim Jones, you could create a ContentBlock tag such as blog-JonesT, place a new Content Block iPart on a content record, and configure the iPart to display the tag blog-JonesT. Now the content that Tim authors in this blog will be unique to his+ blog, if you do not apply this tag anywhere else:



Content created with anything other than a Content Block iPart will not be displayed, even if it has the same tag. For example, a content record containing HTML tagged with News will not show up in a Content Block that is also using the News tag.

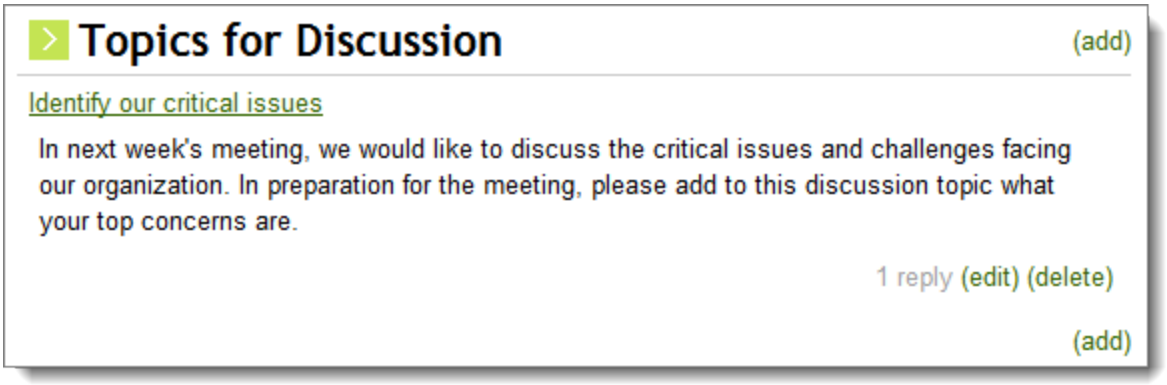
Best practice: Plan for and create the tags you want to use before configuring your Content Block iParts. Content can seem to disappear if you change the tags assigned to a content block already in use, because it no longer matches the tag set currently configured.

Creating a message board

Only users with the Content Editor permission may create posts and children, but any authenticated users can reply to a post and edit or delete their own replies. Any authenticated user may create posts and children, reply to a post and edit or delete their own replies.

To use the Content Block as a message board with multiple posts, child posts, and replies, make use of the following configuration options:

- Maximum items to display - Choose the maximum number of posts that will be displayed; 0 indicates an unlimited number of posts.
- Display mode - Expanded display mode will display replies and child posts in-line, while Summary mode only shows replies and child posts when the post is opened.
- Allow child posts - Allow Content Editors to add a child post to existing content. Allow any authenticated user to add a child post to existing content.
- Allow replies to posts - Allow authenticated users to reply to posts; you may indicate whether to allow HTML and/or attachments in the replies.



Content Block iPart set up as a discussion board

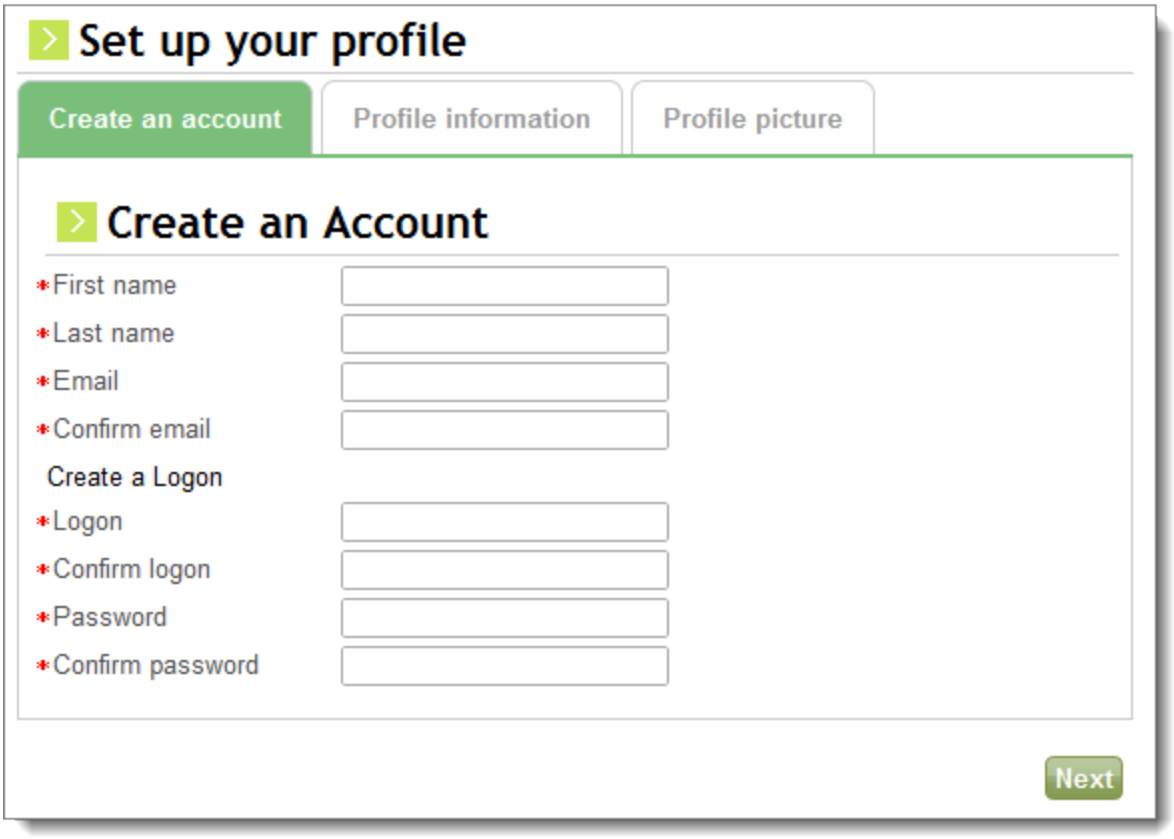
Using the Content Collection Organizer

Use the Content Collection Organizer to create a collection of pages and assign names to the tabs or headers for each page. In the simplest example, those pages are displayed, the user can access tabs in any order desired, and information is saved independently on

each page. The following screenshot shows an example with tabs across the top, configured to display different content pages.

Using the Content Collection Organizer as a Wizard

You can configure the Content Collection Organizer to function as a wizard, which will guide the user through multiple steps. When enabled, Next and Previous buttons display, allowing users to navigate between the steps, as shown below. The user can navigate to any previous tab, but forward only to the next tab in the workflow sequence. The user can also navigate with the browser's Forward and Back buttons, but the data does not commit until the user clicks Next.



Each page in the workflow is validated when the user clicks the Next button. Each iPart's page.Validate method is processed in the order the iParts appear on the page. The order of calls is:

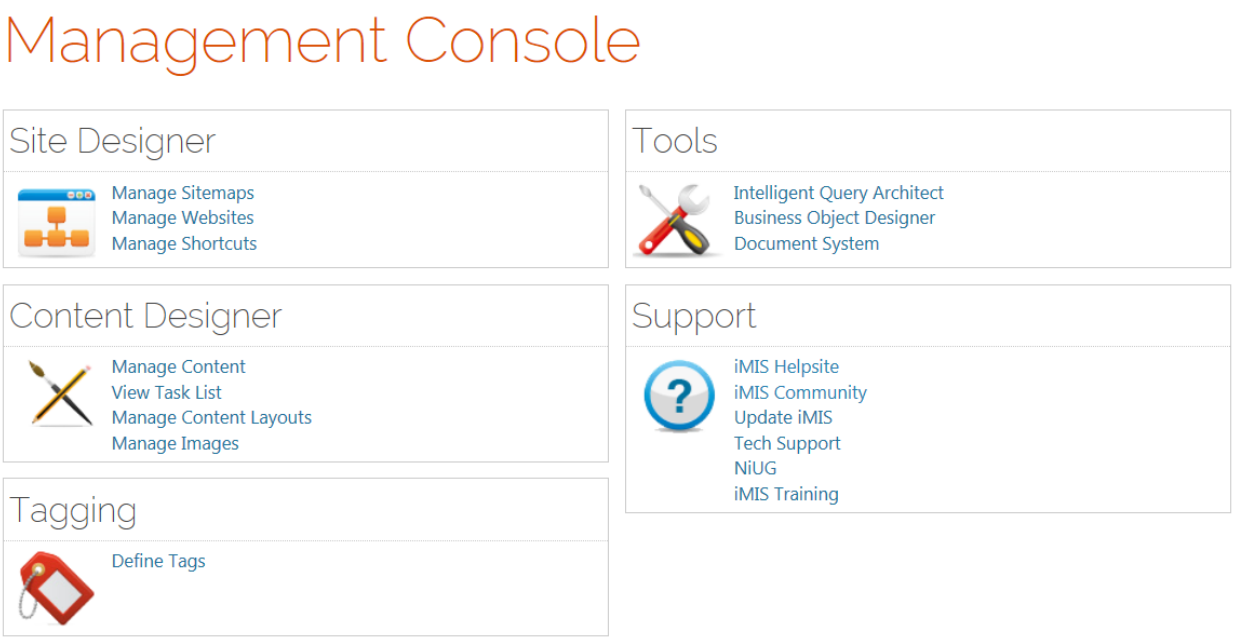
- Validation
- If Validation passes, then PreCommit
- If PreCommit passes, then Commit

If any of the calls fail (the data on a page is incomplete or incorrect), then an error message displays and the user cannot move to the next step until it is corrected.

Using the Big Button Panel iPart

With the Big Button Panel iPart, you can display a navigation panel that combines a larger, category-defining image with a list of links, as shown in the screenshot below. You

can also use this iPart to create links that make it easy for staff to perform routine tasks for contacts such as running reports, registering for events, and ordering on their behalf.



Example: Working On Behalf Of contacts and running reports using the Big Button Panel

In this example, we will set up the Big Button Panel on the account page, so that staff can select a contact from the Directory, then quickly run a report, register for an event, make a donation, or order a product for that contact.

1. Edit the account page that displays after a staff user selects a contact from your directory. In the Member site, it is the Account Page Staff content record.
2. Add the Big Button Panel (add content > ContentTypes > Content > Big Button Panel) iPart to the content record and configure it with the following settings:

- Mode: Actions
- Add an action link to run a report:
- Link Text: Print Info
- Link Target: Enter a link to a page that contains the SSRS Report iPart that displays a report such as $/Samples/ReportingServices/MemberProfileQuery_Report.

Note: The SSRS Report iPart must be configured to Hide the parameters section and to enable the option to Inspect query string for parameters. Do not enable the option to Inspect Session for parameters. For more information about SSRS reports, see Creating SSRS reports.

- URL Parameter: ContactKey=@SelectedUser
- Add an action link for event registrations:
- Link Text: Register for an event

  Note: Customize this text for the event you want to register the contact for. For example, Register for the Spring Conference.
- Link Target: Enter a link to the event page
- URL Parameter: EventKey=XYZ (replace XYZ with an event code) EventKey=XYZ (replace XYZ with an event key)
- Use On Behalf Of: Enable
- Add an action link for donations:
- Link Text: Make a donation
- Link Target: Enter a link to your donation page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable
- Add an action link for the shop:
- Link Text: Purchase a product
- Link Target: Enter a link to your Shop page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable

3. Save and Publish the account page.

Using the Group List Editor iPart

The Group List Editor provides a flexible tool for you to display and manage lists of groups, sub-groups, relationships, and/or memberships. You can configure it to serve several different purposes.

Display an organization's roster

A common use for the Group List Editor is to display a list of contacts that belong to an organization.

For example, add the iPart to an organization's profile page, so that the iPart displays memberships for the selected organization. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the roster
- Clicking on a contact opens their profile page: Enable to link contact names directly to their profile page
- Provide option to view and edit membership details: If you want users to have easy access to both the account pages and the Group Member Detail window, also enable this option. Users can click an icon to switch between these options.
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups owned by the parent ID and their members
- Choose the group types to include: Organization
- Automatically create a group if one does not exist: Enable if you have allowed editing (this allows the creation of new rosters)
- Group owner type: Party
- Group type to auto-create: Company
- Choose the group types to include: Ensure that Company is selected

Display a contact's memberships

Another common use for the Group List Editor is to display a list of a contact's memberships in groups such as committees and chapters.

For example, add the iPart to a contact's profile page, so that the iPart displays memberships for the selected contact. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the contact's memberships
- Clicking on a contact opens their profile page: Not applicable
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups that the parent ID is a member of
- Choose the group types to include: Select the group types you want to display, such as Chapters and/or Sections

Relationships in the Group List Editor

You can easily create a link between two contacts using the Group List Editor iPart. The relationships you define show up on the record of both contacts, and you can specify roles for one or both of the contacts. For example, if you edit Jean Smith's record to indicate that she knows Russell Smith, then that relationship will also appear in Russell Smith's record. Alternately, if you edit Jean's record to indicate that Russell is her child, you can also specify that her role is the parent of Russell. Then Russell's record will reflect that Jean is his parent.

There is no limit to the number of relationships you can create or the types of relationships you can create. We have provided a few relationship types out-of-the-box, but you can add additional ones if needed.

Only users with System Administrator or Staff privileges can create relationships between contacts, but any user can view a list of relationships.

Note: To use this relationship feature, you must have the RELATION license.

The following sections walk you through how to create relationship types and how to set up the Group List Editor to display relationships.

Creating relationship types groups and roles

Edit the Customer setup table for Relationship types, adding the relationships that you want to have available in the Group List Editor. For each relationship type you add, you can also define a Reciprocal relationship, which the Group List Editor automatically populates as a set (such as for Parent and Child).

To display and edit relationships in the Group List Editor, you must define a Relationship Group and Roles (relationship types) associated with that group. A sample relationship group type named Connections has been provided. You can create your own group type from Setup > Groups > Types. If you create your own group type, the only requirement is that you select the Relationship Group checkbox, so that the Group List Editor can properly display relationships.

To create Roles used in relationship groups

1. Decide which relationships you want to be able to define for users. For example, Parent-Child, Husband-Wife, etc.
2. Create Roles for each relationship type.

- From Setup > Groups > Roles, click add.
- Enter the Name of the Role and a Description of the role.
- Select the Active checkbox.
- (optional) Select a default Reciprocal Role for this role. For example, if you are creating a Parent role, you may consider selecting Child as the default Reciprocal Role, so that it is automatically selected when someone defines a Parent relationship. If the Reciprocal Role you want to add is not in the list, create it first, then add it to this role.
- Save and repeat for each relationship role you want to define.

3. Edit your relationships group (for example, the group Connections) to add the roles you have defined.

To set up the Group List Editor to display relationships

1. Add the Group List Editor iPart to a content record on which you want to display a list of a contact's relationships. For example, add it to an account page. The iPart displays a list of relationships for the currently selected contact. The selected contact is determined by either a contact ID passed to the page via a URL parameter (from the Directory, for example), the contact selected in the On Behalf Of control, or the currently signed in user.

   Note: For help adding iParts, please see Creating Custom Panels of Data.

2. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit relationships
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Both of the above
- Automatically create a group if one does not exist: Enable
- Group owner type: Party Choose the group types to include: Select Relationships
- Group type to auto-create: Select a relationship group, like Connections
- Choose the group types to include: Ensure that Connections is already selected.

  Note: Only the relationship group type selected to auto-create may be edited. For this reason, if Allow editing is selected, we recommend including only the one relationship group type in this instance of the iPart.

3. Save and Publish the content record.

Using the Content HTML iPart

Using the Content HTML iPart, you can add simple content to your website, anywhere you want. In addition to the WYSIWYG functionality, you can switch to HTML mode to insert JavaScript to embed other sites, display web widgets, and use variables to create relative paths.

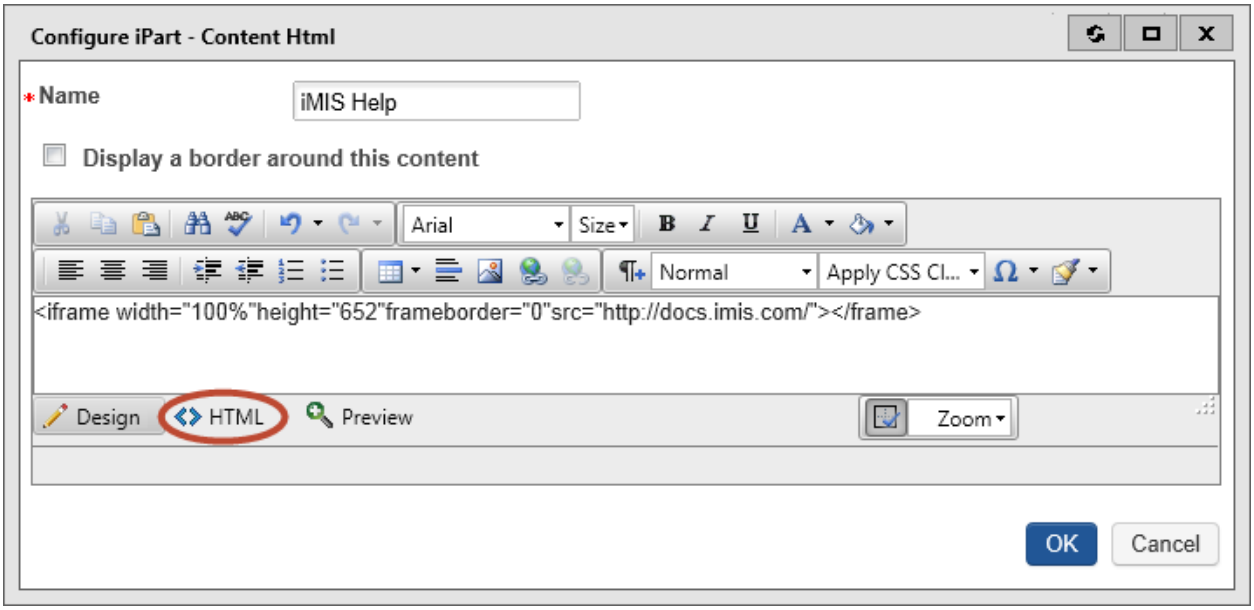
Embedding external sites

To embed any external page into an iMIS site, you can use an <iframe> like this:

1. Go to Content designer, Manage content and create a new content record.
2. Select add content and place a single Content Html iPart on it (from the ContentTypes folder).
3. Show the source by clicking the <> HTML tab and type in an iframe tag, such as this:

   <iframe width="100%" height="652" frameborder="0" src-c="http://docs.imis.com/"></iframe>

4. Go to Tools > Site designer > Manage sitemaps and create a new navigation item that points to the new content record.
5. If appropriate, restrict the navigation item's Access Settings, such as to Authenticated User Full Control.



Displaying web widgets

You can install and display JavaScript-based web widgets (plugins, gadgets) in your WCM-generated websites using the Content HTML iPart. A web widget is a small pro-

gram that your users can execute within a web page and that can provide a wide range of functionality.

For example, Google Gadgets offers thousands of free web widgets including mini applications, games, news feeds, maps, and a wide range of other types of content. Many other websites also provide free widgets that can access data from their site. For example, Twitter provides widgets that let you display Twitter updates on your website. LinkedIn provides plugins that display information such as company profiles, member profiles, and links to share on LinkedIn. You just have to search the web to see what you can find that meets your needs.

Warning: Only embed widgets from authors whom you trust. Malicious code may damage your computer or violate your privacy.

To add a JavaScript-based web widget to a webpage

Go to Content Management > Content designer > Manage content:

1. Create a new content record or edit an existing one.
2. Click add content to find and select the Content Html iPart.

   The Configure iPart window opens.
3. Click < > HTML to switch to HTML mode.
4. Copy the JavaScript embed code for the widget you want to add and paste it into the HTML area.
5. Click OK, then Save and Publish your content record.

   The widget is displayed when that content record is rendered on a webpage.

Creating relative paths using variables

The Content HTML iPart does not support the use of the ~/ (tilde slash) shortcut, often used to automatically build the correct paths when a control is rendered in different domains. However, several variables are available in this iPart that allow you to enter

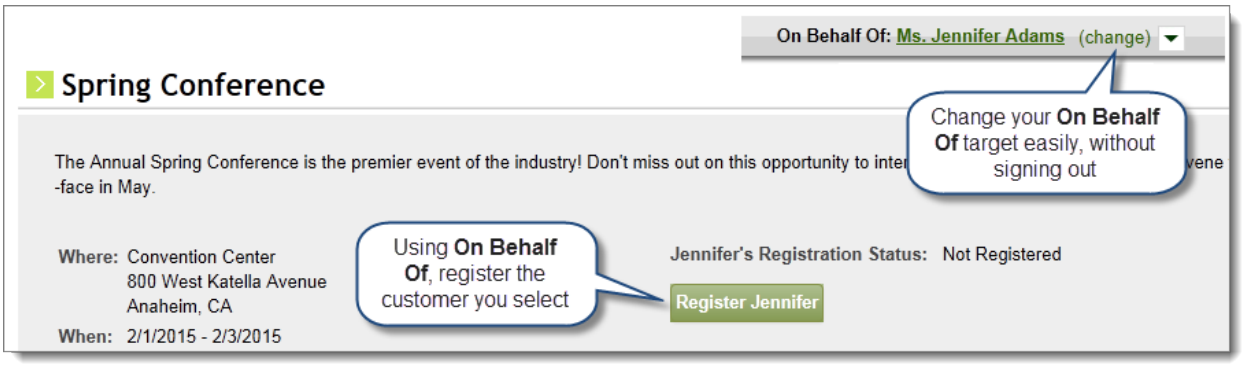
paths for links and resources that are automatically resolved to various folders in your website. The variable names are case-sensitive.

Note: Images do not render in Design mode because the variable is not transformed until the content record is published.

- [Website] – Resolves to the root of the website and contains the website name. Example: [Website]Home.aspx.
- [~] and [Root] - Both variables resolve to the root of the website. Example: [~]Home.aspx resolves to http://mydomain/Home.aspx.
- [Theme] - Resolves to the website's theme folder. Example: [Theme]images/image.png. This variable can be used to access theme resources such as images and CSS.
- [iMIS] - Resolves to the iMIS directory of the website. Example: [iMIS]ContactManagement/CreateAccount.aspx
- [Common] - Resolves to the AsiCommon directory of the website. Example: [Common]Controls/Shared/FormsAuthentication/Login.aspx

On Behalf Of: Customer service mode

Your iPart-based site is not just for self-service: On Behalf Of gives your staff a customer service mode, to complete website commerce on behalf of your customers. When requests for event registrations, product orders, and even membership renewal payments come in by phone, fax, or email, On Behalf Of lets you conduct a secure session during which you can add items to a customer's cart and complete the transaction for them, all without signing out of your own session.



Separate carts, for privacy

To avoid confusion and to protect your customers' privacy as to which items they may have added to their own carts, On Behalf Of sessions create and save carts that are completely separate from those your customers see. For added security, items yet to be purchased are saved in these carts, but not any cardholder information that may have been entered.

For example, if you added a registration to a member's cart but do not submit it, then she will not see the registration in her cart the next time she signs in; however, when you return to registering her on her behalf, you see her cart restored to the state it was in when you left it. Once you complete a purchase on her behalf, both she and you can see the order through her account page.

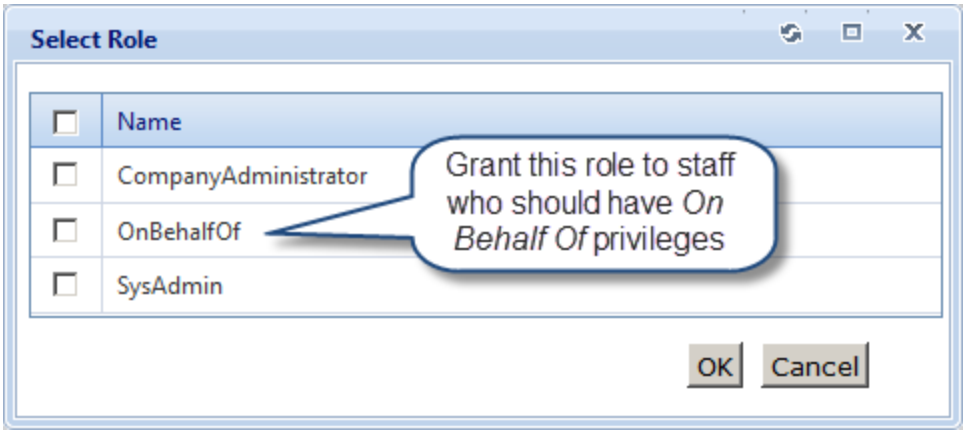
Tip: You can use the audit trails to track which logged-in user performed each action that affected an On Behalf Of transaction.

Who can act On Behalf Of?

To protect the security of contact data, users must be added to the security role SysAdmin or OnBehalfOf to perform actions on behalf of another contact (individual or organization). It is easy to give a staff member On Behalf Of privileges.

Go to System Setup > Security administration > Users:

Find and select a user, and in User Information click add role.



Changing and ending On Behalf Of

When you act on behalf of someone else, all of your commerce-related actions pertain to the target contact until you end the session in one of these ways:

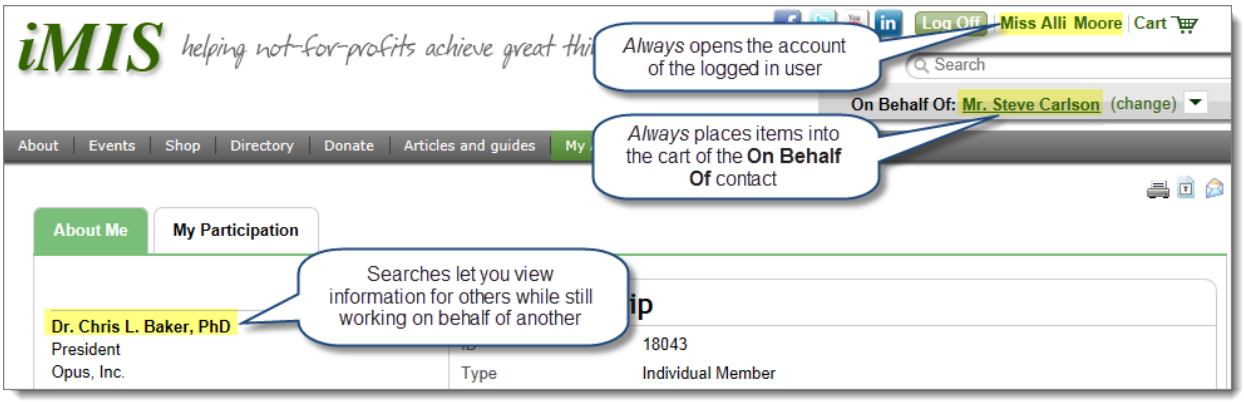
- Select a new target contact: click (change) next to the target contact.
- Clear the selected contact: click the down arrow next to the target contact and select Clear.
- Close the browser.
- Sign out of iMIS.

Whose contact information do iParts show?

Acting on behalf of another contact controls the current cart, but it does not keep you from getting to information for other contacts. An iPart determines whose cart and information to show and update based on this logic:

- If the link's URL specifies an ID (such as for search results), it shows information for that contact.
- If not, it shows information for your On Behalf Of contact, if appropriate. (For example, the Query Menu iPart runs queries regardless of the target contact.)
- Without On Behalf Of, it shows information for you, the logged-in user.
- If no one is signed in, it shows limited information.

For example, you could be working on behalf of one contact when you need to use the Directory to look up an address for another. You can drill down on information from those searches with no effect on your on-behalf-of contact: the iParts pass the queried contact's ID on the URL to show you the information you need. Only when you take actions that add items to the cart is On Behalf Of enforced.



Tip: What never changes is the contact name link in the top navigation: it always shows information for you (the logged-in user).

Working with iMIS SOA

iMIS includes an extensive set of data intense applications, with literally hundreds of data object types. In addition, iMIS supports user defined data extensibility in several areas. To support this wide variety of data types in a consistent manner, and to keep the API manageable and consistent across all data types, iMIS SOA Web Services takes a simple, uniform approach with a basic set of available operations that may be performed over any available data types.

In the language of iMIS SOA Web Services, an instance of a business object (object, row in table, etc.) is an “Entity” and the type of business object is an “Entity Type”. For instance, common entity types in iMIS SOA Web Services include Party, Person, Address, Item, Cart, Order, Payment, etc.

iMIS SOA Web Services provides a basic set of operations that can run against an entity or a collection of entities. The basic operations include:

- Find (by query)
- Add
- Update
- Delete

You may know these operations as CRUD: Create, Read, Update, and Delete. In additional there are the following additional services:

- Execute
- FindByIdentity
- Validate
- FindMetaDataForEntity
- FindChangeLogByIdentity

Depending on the programming environment, access to web service operations generally involves these steps:

- Get an instance to an object or proxy that represents the web service, with login credentials
- (Optional) Create instances of objects (such as a query object) that include operation data you want to pass to the web service.
- Call the web service, naming the entity type and required operation parameters.
- When the call returns results (which is the usual case), examine the results of the operation.

Example: PHP, using the iMIS PHP toolkit

```
// create an instance of the iMIS Entity Service client proxy
$baseURL = 'http://www.imiscommunity.net/iMISSoa';
$username = 'username';
$password = 'password';
$client = new iMISEntityService($baseURL, $username, $password);

// create and populate a query object
$query = new QueryData('Party');
$query->addCriteria(new CriteriaData('PartyID', CRITERIA_EQUAL, '101'));

// request the operation
$findResults = $client->Find($query);

// examine results
if (count($findResults->Result) == 0)
```

```
{
echo "Party not found.\n";
exit();
}
$party = $findResults->Result[0];
echo "Find Party: $party \n";
```

Of course, in regular practice, be sure to trap for errors, especially around the actual call to web services.

You can access a detailed reference to the API for iMIS SOA Web Services in the SDK Center of iMISCommunity.com.

Entity Service

The service layer of iMIS SOA provides all of its functionality through the EntityService web service. Both EntityService and EntityManager implement IEntityService. Entity Manager (the client-side proxy) implements IEntityService by passing calls to EntityService, and it adds additional local methods. For help initializing the EntityManager, see General authentication strategies by endpoint.

> **Note:** Note: Not all operations are supported for all entity types. You will get an operation not supported error if the entity type does not support it.

Use the IEntityService to perform the following operations:

- Find – Find entities by query
- FindByIdentity – Find an entity by its identity (primary key in many cases)
- Validate – Validate an entity instance
- Add – Add a new instance of an entity

- Update – Update an entity instance
- Delete – Delete (or mark deleted) an instance of an entity
- Execute – Execute an entity specific extended operation
- FindChangeLogByIdentity – Get a change log
- FindMetadataForEntity – Get the entity metadata

  In addition, Entity Manager adds:

- FindAll – get all entities of a given type.

  In order to enable your Visual Studio project to use iMIS SOA (such as if you are developing an iPart), you'll need to add client-side assemblies to your project.

  Sample .NET Code

  using System.ServiceModel;

  using Asi.Soa.Commerce.DataContracts;

  using Asi.Soa.Core.ServiceContracts;

  using Asi.Soa.Core.DataContracts;

  using Asi.Soa.Core.DataContracts.Faults;

  using Asi.Soa.Fundraising.DataContracts;

  using Asi.Soa.Events.DataContracts;

  using Asi.Soa.Membership.DataContracts;

Common Operations

Find

Method signature:

FindResultsData Find(QueryData query);

The two interesting structures here are the query and the returned find results.

Find is the first operation to learn in iMIS SOA. To use Find:

- Create an instance of a query object:
- (required) The query names the entity to be queried.
- (optional) Include a pager object instance to control how much data is returned and which “page” of data is requested.
- (optional) Include a collection of sort fields.
- Call the Find operation.
- Trap for errors.
- Examine results.
- The entities are returned in an IList collection.
- The pager is updated with actual results. Page sizes are truncated to system maximums or set to default values, if not specified. The page total rows available and information on the current returned pages is available.

Example:

```
var query = new QueryData("PartySummary") { Pager = new PagerData { PageSize = 5 } };

query.AddCriteria(CriteriaData.StartsWith("LastName", requestedLastName));


// invoke the operation to get a list of PartySummary

FindResultsData results2 = entityService.Find(query);


// loop through the pages

        while (results2.Query.Pager.PageNumber < results2.Query.Pager.PageCount)
```

```
        {
            Console.WriteLine("Page: {0}", results2.Query.Pager.PageNumber);

            // the returned Parties will be in in the results.Results list.
            foreach (PartySummaryData partySummary in results2.Result)
            {
                Console.WriteLine("Party: PartyId: {0}, Name: {1}", partySummary.PartyId,
partySummary.Name);
            }

            results2.Query.Pager.PageNumber++;
            results2 = entityService.Find(results2.Query);
        }
```

QueryData

The details are removed:

```
public class QueryData
  {
     public QueryData(string entityTypeName) {}
     public QueryData() {}

     public string EntityTypeName { get; set; }
     public CriteriaDataCollection Criteria { get; set; }
```

```
    public PagerData Pager { get; set; }
    public SortFieldDataCollection SortFields { get; set; }

    public QueryData AddCriteria(CriteriaData criteriaData) {}
  }
```

Find Results

The details are removed:

```
  public class FindResultsData
  {
    public QueryData Query { get; set; }
    public IList Result { get; set; }
  }
```

Pager

The details are removed:

```
  public class PagerData : IExtensibleDataObject
  {
    public int? PageNumber { get; set; }
    public int? PageSize { get; set; }
    public int? PageCount { get; set; }
    public int? TotalRowCount { get; set; }
  }
```

Sample .NET code for SortFieldData class

```
public class SortFieldData
{
  public string PropertyName {}
  public SortOrderData? SortOrder {}
}
```

And, of course, you'd then need SortOrderData:

```
public enum SortOrderData
{
  Ascending,
  Descending
}
```

FindByIdentity

Method signature:

```
object FindByIdentity(IdentityData identity);
```

The interesting structure here is IdentityData.

IdentityData

The details are removed:

```
public class IdentityData
{
  public IdentityData() {}
  public IdentityData(string entityTypeName, string element) {}
```

```
    public IdentityData(string entityTypeName, IEnumerable<string> elements) {}
    public string EntityTypeName { get; set; }
    public Collection<string> IdentityElements { get; set; }
}
```

IdentityData is largely a pointer to a unique entity instance. It contains the entity name and one or more identifying elements (usually just one). These elements usually correspond to a primary key.

To use FindByIdentity:

- Construct an identifier.
- Call the FindByIndentity operation.
- Trap for errors.
- If the entity existence exists, you will have the entity returned to you; otherwise, your return result will be null.

Validate

Method signature:

ValidateResultsData Validate(object entity);

The new interesting structure here is the ValidateResultsData.

ValidateResultsData

The details are removed:

```
public class ValidateResultsData : IExtensibleDataObject
{
    public object Entity { get; set; }
    public ValidationResultsData ValidationResults { get; set; }
```

```
    public bool IsValid { get; set; }
    public bool HasWarnings { get; set; }
  }
```

ValidationResultsData

The details are removed:

```
  public class ValidationResultsData
  {
    public ValidationResultDataCollection Errors { get; set; }
    public ValidationResultDataCollection Warnings { get; set; }
    public bool HasWarnings { get; }
    public bool IsValid  { get; }
    public string Summary {get;}
  }
```

ValidationResultData

The details are removed:

```
  public class ValidationResultData
  {
    public string FieldName { get; set; }
    public string FieldValue { get; set; }
    public string Location { get; set; }
    public string Message { get; set; }
```

```
    public string FormattedMessage { get; }
}
```

ValidationResultsData is a collection of errors and warnings. ValidateResultsData is used in several other places, and it is the general return message for error results for iMIS SOA. To use Validate:

- Call the Validate to send the entity instance you want to validate.
- Trap for errors.
- Examine the retuned ValidateResultsData for errors.
- ValidateResultsData also includes the entity instance. Many validate operations may update the entity instance before it is returned. For instance, validating an order (via the CartData contract) should return an order with all the details recalculated, plus any errors.

Add

Method signature:

```
ValidateResultsData Add(object entity);
```

Like Validate, Add returns a ValidateResultsData, including an updated entity instance that may include addition data (notably the identity properties), which should be updated. To use Add:

- Call the Add to send the entity instance you want to add.
- Trap for errors.
- Examine the returned ValidateResultsData for errors.

  You can also examine the IsValid property to determine whether the results are valid. If not, examine the ValidationResultsSummary property, which lists all of the error and warning strings that you can view.
- ValidateResultsData also includes the entity instance. Many Add operations may update the entity instance before it returns.

Update

Method signature:

```
ValidateResultsData Update(object entity);
```

Like validate, Update returns a ValidateResultsData, including an updated entity instance that may include addition data (notably the identity properties), which should be updated. To use Update:

- Call the Update to send the entity instance you want to update.
- Trap for errors.
- Examine the returned ValidateResultsData for errors.

  You can also examine the IsValid property to determine whether the results are valid. If not, examine the ValidationResultsSummary property, which lists all of the error and warning strings that you can view.
- ValidateResultsData also returns the entity instance. Many Update operations may update the entity instance before it returns.

Delete

Method signature:

```
void Delete(object entity);
```

Delete returns no validation result, but it should throw a ValidationFault if it fails. To use Delete:

- Call Delete to send the entity instance you want to delete.
- Trap for errors.

Execute

Method signature:

```
object Execute(ExecuteRequestBase request);
```

Execute is a method that some entity implementations provide for operations that go beyond the standard operation set, such as to provide for a special find or to trigger a posting. The argument is very specific to the implementation.

The request argument requires an instance of a class that derives from the ExecuteRequestBase abstract class. Any class that derives from ExecuteRequestBase must, at minimum, override the following properties:

- EntityTypeName - The indication the SOA entity to which the request should be directed.
- OperationName - A directive to the entity concerning which specific processing should be performed.

Examples of pre-defined iMIS SOA classes that derive from ExecuteRequestBase include the following:

- ImportFileRequest - This provides the ability to import data, contained in a file, into iMIS. The EntityTypeName and OperationName properties must be set to route the file import request to an SOA entity that understands the incoming data. Alternatively, you can specify "ImportFileType" as the EntityTypeName and one of the following values as the OperationName:
- ImportFile - Lets you direct a file to a particular entity that creates the appropriate data that can be processed by the File Viewer for Web Services iPart (which utilizes an Execute method with the ImportBatchPostRequest). The FileTypeId property must be set to the appropriate value corresponding to a row in the ImportFileTypeRef database table.
- ImportFilePassThrough – Lets you import an existing XML file, consisting of data contracts that are recognized by iMIS SOA, directly into the system with no additional processing, for eventual batch posting by the File Viewer for Web Services iPart.
- ImportBatchPostRequest - This causes data that was imported via an Execute method using an ImportFileRequest argument to be processed.

To use Execute:

- Determine the correct ExecuteRequestBase subclass to use as an argument to the Execute method.
- Call the Execute method.
- Trap for errors.
- Examine the return object as required. The return object varies depending upon the Execute request that was performed.

  FindChangeLogByIdentity

  Method signature:

  FindResultsData FindChangeLogByIdentity(IdentityData identity);

  Currently, FindChangeLogForIdentity is implemented for the Party entity only, but expect to see more use in future releases of iMIS. To use FindChangeLogForIdentity:

- Prepare an IdentityData instance for the entity needing the change log.
- Call the FindChangeLogForIdentity operation.
- Trap for errors.
- Examine the returned results.

  FindMetadataForEntity

  Method signature:

  EntityDefinitionData FindMetadataForEntity(string entityTypeName);

  EntityDefinitionData contains metadata about the entity and its properties.

  EntityDefinitionData

  The details are removed:

  ```
  public class EntityDefinitionData
  {
  ```

```
    public string EntityTypeName { get; set; }
    public string Description { get; set; }
    public EntityPropertyDefinitionDataCollection Properties { get; set; }
    public RelatedEntityDataCollection RelatedEntities { get; set; }
    public string SchemaVersion { get; set; }
  }
```

EntityPropertyDefinitionData

```
  public abstract class EntityPropertyDefinitionData
  {
    public string Caption { get; set; }
    public object DefaultValue { get; set; }
    public string Description { get; set; }
    public string DisplayMask { get; set; }
    public bool IsCollection { get; set; }
    public bool IsIdentity { get; set; }
    public bool Logged { get; set; }
    public string Name { get; set; }
    public PropertyRenderingInformationData RenderingInformation { get; set; }
    public bool Required { get; set; }
    public abstract Type PropertyType { get; }
    public abstract string PropertyTypeName { get; set; }
    public bool Visible { get; set; }
```

```
}
```

EntityPropertyDefinitionData is actually a base abstract class. Specific types of properties will have additional a metadata, such as string length and decimal positions. To use FindMetadataForEntity:

- Call the FindMetadataForEntity operation.
- Trap for errors.
- Examine the returned results.

FindAll (Entity Manager only)

Method signature:

public IList FindAll(string entityTypeName)

public IList FindAll(string entityTypeName, bool clearCache)

FindAll returns an IList of all the entity instances for a given entity. FindAll actually does Find calls and any intermediate paging that may be needed. To use FindAll:

- Call the FindAll operation.
- Trap for errors.
- Examine the returned results.

Common Entity Types

Within iMIS and in the terminology of iMIS SOA, object types are known as entity types. Many entity types are actually composed of several different component entity types. For instance, a Party entity is composed of collections of FullAddress, Salutation, Email, and Phone entities.

Not all entity types are directly accessible via the web services API, but rather only as components of other primary entities (also called aggregate root entities). For example, in the case of a Party, which is a primary entity, you can access the Party entities through

the web service Find, Update, Delete and Add operations, but you can only address the FullAddress, Salutation, Email and Phone components as part of a Party entity. When you request a Find of a Party entity, you receive the entire Party object graph including the FullAddress, Salutation, Email, and Phone collections. Only primary entity types are directly addressable via web services.

Many of the available entity types, both the primary entity types (such as Party, Cart, GroupMember) and other entity types (such as FullAddress and Salutation), are in the set of well-known entity types that are represented, documented, and transmitted via data contracts.

These data contracts, which specify the fields within each entity, can frequently provide IntelliSense to aid programmers in addressing the data. Generally, the actual container (or class) that defines each entity's data contract has the suffix Data. For instance, the contract (programming class) for the Party entity is PartyData.

In other cases, and in certain contexts, the entities are not well-known, may have been a user-defined or an extensible entity, and in some cases the context for returned results is so fluid that entities are not available in their own data contract. These are represented in the GenericEntityData data contract.

The GenericEntityData data contract represents an entity and its fields as a collection of name/value pairs. For instance, if you request a Find of a user-defined table (such as MemberDemographicInfo), the returned result is a collection of GenericEntityData. The fields and their contents are found in the Properties property of the Generic Data entity. Other examples of entities that always return GenericEntityData include the IQA entity, BOD entities, defined tables and views.

This section describes the primary entity types that are directly addressable via web services. For examples of how to use some of these primary entities, see the section .NET Examples.

Core system primary entities

- PanelDefinitionSummary (see PanelDefinitionSummaryData) – Top level summary of a UI panel, which provides a set of basic data, used primarily by the Panel Editor to display lists of available UI panels when defining an instance of a Panel Editor. This entity includes both legacy (Customizer) panels and newer more dynamic UI panels.
- PanelDefinition (see PanelDefinitionData) – Extension of PanelDefinitionSummary. It provides more detailed properties of a UI Panel. This describes the columns of the panel, the source entity for a property to be displayed, and pertinent details about how each property is to be displayed within the UI panel.
- SystemSettings (see SystemSettingsData) – Properties for core system settings, represented in a GenericData entity.

Membership primary entities

- PartySummary (see PartySummaryData) – Top level summary of a Party, which provides a set of basic data to identify a Party. A Party represents any sort of business organization or person. It is roughly equivalent to a Name instance in iMIS 10 data schema, a CContact in iBO, or a Contact in iMIS 15. Most contact browser applications should usually query and display PartySummary information, and only after the operator makes a selection, then query for the full Party record.
- Party (see PartyData) – Extension of PartySummary, which provides more detailed properties of a Party. You generally query for Party (not its subclasses) and check the object type if you want detailed Person or Organization information. Party entities cannot be created directly: instead, create Person or Organization entities.
- Person (see PersonData) – A subclass of Party, which provides additional properties for a person. The enumeration of PersonData provides a list of possible genders (male or female).
- Organization (see OrganizationData) – Contains information specific to a company or other organization.

- ComboParty (see ComboPartyData) – Properties of a ComboParty, which can represent either a person or an organization.
- NamePrefix (see NamePrefixData) – Prefix component of PersonName.
- NameSuffix (see NameSuffixData) – Suffix component of PersonName.
- PartyImage (see PartyImageData) – Properties of an image for a Party (such as a profile picture).
- PartyNote (see PartyNoteData) – Properties of a note for a Party.
- PartySalutationMethodSummary (see PartySalutationMethodSummaryData) – Properties of a Party salutation method.
- PartyStatus (see PartyStatusData) – Properties of a Party's status. The enumeration of PartyStatus provides a list of possible party status types.
- User (see UserData) – Properties of a user, such as effective and expiration dates.
- AddressPurpose (see AddressPurposeData) – Properties of an address purpose.
- Country (see CountryData) – Properties of a country.
- GroupSummary (see GroupSummaryData) – Top level summary of a group, with a subset of all the group properties. Membership groups are used to represent almost any list of parties (persons or organizations). Typical groups include committees, community members, membership and subscription groups. The current implementation supports these group types:
- The product/subscription groups for dues, subscriptions, sections, chapters, miscellaneous, committees – GroupType: "DUES", "SUBS", "SEC", "CHAPT", "VOL", "MISC", "COMMITTEE"
- Event registrants – GroupType: "EVENT-xx" where "xx" = Meeting code
- Groups of Parties for each member type – GroupType: "MT-xx" where "xx" is the legacy member type.
- Organizational (Company) roster groups – GroupType: "ORGRELATIONSHIP"

- Relationships – GroupType: “RELATIONSHIP”
- Group (see GroupData) – Extension of GroupSummary which defines additional properties of a Membership group, including available roles.
- GroupClassSummary (see GroupClassSummaryData) – Properties of a class of groups. Includes properties for whether the group class is a simple group (with no MembershipDetails), or a relationship group (supports two-way relationships).
- GroupMemberSummary (see GroupMemberSummaryData) – Properties for a party that is a member of a group. Includes properties for both the party and the group they are a member of, as well as details about the membership.
- GroupMember (see GroupMemberData) – Extension of GroupMemberSummary, which contains MembershipDetails for a party that is a member of a group.
- MembershipSettings (see MembershipSettingsData) – Properties for membership settings, represented in a GenericData entity.

Commerce primary entities

- Cart (see CartData) – A universal order. It contains the major components Order, Payments, Invoices to be paid, and a property for the ComboOrder.
- ComboOrder (see ComboOrderData) – Properties of a ComboOrder, including the Order, Invoices, and Payments.
- Order (see OrderData) – Detailed properties of a sales order. The enumeration of OrderData provides a list of possible order states.
- ItemSummary (see ItemSummaryData) – A subset of properties for an item. An item is used mainly for the purposes of ordering and pricing, and represents a product or service.
- Item (see ItemData) – An extension of ItemSummary, which provides additional properties for an item. An item is used mainly for the purposes of ordering and pricing, and represents a product or service.

- ItemClassSummary (see ItemClassSummaryData) – Properties of an item class. An item class describes the default financial and processing attributes of an item.
- ItemClass (see ItemClassData) – An extension of ItemClassSummary which provides additional properties for the item class, such as financial information.
- CommerceSettings (see CommerceSettingsData) – Properties for commerce settings, including Price Sheet information.
- DeliveryMethod (see DeliveryMethodData) – Properties of a delivery method.
- DeliveryMethodSet (see DeliveryMethodSetData) – Properties for a set of delivery methods.
- FinancialEntitySummary (see FinancialEntitySummaryData) – Properties of a financial entity.
- GLAccount (see GLAccountData) – Properties of a general ledger account.
- InvoiceSummary (see InvoiceSummaryData) – A subset of properties for an invoice. The enumeration of InvoiceSummary provides a list of possible invoice types.
- Invoice (see InvoiceData) – An extension of InvoiceSummary which provides additional properties for an invoice, such as the invoice lines.
- PartyCommercePreferences (see PartyCommercePreferencesData) – Party-specific commerce preferences.
- UserCommercePreferences (see UserCommercePreferencesData) – User-specific commerce preferences.
- PartyItemPrice (see PartyItemPriceData) – Properties describing the pricing information for a specified Item within the context of a specific Party. Each party might receive different pricing for the same item based on various pricing rules; party item price always returns the correct pricing for the given party.
- PriceSheetSummary (see PriceSheetSummaryData) – Properties of a price sheet, which specifies a pricing set to be used.

- PaymentMethod (see PaymentMethodData) – Properties of a payment method. This is derived from cash accounts in iMIS 10 and 15.
- PaymentMethodSet (see PaymentMethodSetData) – Properties of a set of payment methods.
- PaymentTermsSummary (see PaymentTermsSummaryData) – Properties of payment terms generally related to InvoiceData.
- TaxAuthoritySummary (see TaxAuthoritySummaryData) – Properties of a tax authority.
- TaxCategorySummary (see TaxCategorySummaryData) – Properties of a tax category.
- TaxScheduleSummary (see TaxScheduleSummaryData) – Properties of a tax schedule.
- UomGroup (see UomGroupData) – Properties of a unit of measure group.

Event primary entities

- EventSummary (see EventSummaryData) – Top level summary of an event, with a subset of all of the event properties.
- Event (see EventData) – Extension of EventSummary, which provides detailed properties of an event.
- EventFunction (see EventFunctionData) – Properties of an event function.
- EventRegistrationSummary (see EventRegistrationSummaryData) – Top level summary of an event registration, with a subset of all of the event registration properties. The enumeration of EventRegistrationSummary provides a list of possible event registration statuses.
- EventRegistration (see EventRegistrationData) – Extension of EventRegistrationSummary, which provides detailed properties of an event registration.
- EventSettings (see EventSettingsData) – Properties for event settings.
- PartyEventAvailability (see PartyEventAvailabilityData) – Provides information describing whether a party can register for an event.

Fundraising primary entities

- FriendraisingSettings (see FriendraisingSettingsData) – Settings used to manage the transfer of data from the iMIS Friendraising module into core iMIS database via the Friendraising bridge, including details of how to access and authenticate to the bridge and how values are mapped by the bridge.
- Transaction – Contains data for Friendraising, including survey questions, tribute details, monthly donation plan information, registration information, and the iMIS event the donation is linked to.
- ImportedPayment (see ImportedPaymentData) – Used with recurring donations and contains the recurring donation details supplied by a bank or financial institution for loading into iMIS, including the charity bank details, the donor bank details (account name, branch code and account number), the donation amount, and payment date. This is the sort of information that would usually be included in a BACS import file.
- TributeType (see TributeTypeData) – Used when creating donations to pull a list of tribute types and their descriptions (i.e. In Memory of) and to specify the type of tribute within a TributeInformation object.
- TributeInformation (see TributeInformationData) – Used when adding a tribute donation. It specifies the tribute type, the party the gift is in tribute of, and the party we should notify of the tribute gift.

Address Verification primary entity

- AddressVerificationService (see AddressVerificationServiceData) – Contains the address collection used for the address verification service.

NRDS primary entities

- NrdsAssociation (see NrdsAssociationData) – Properties of an NRDS Association.)
- NrdsMember (see NrdsMemberData) – Properties of an NRDS Member.
- NrdsOffice (see NrdsOfficeData) – Properties of an NRDS Office.

- NrdsConfiguration (see NrdsConfigurationData) – Properties for configuration of the NRDS bridge to iMIS.

Data Contracts

Data contracts define an abstraction of the business concepts (Properties) represented within iMIS SOA. Data contracts are shared across all layers of the architecture and across all underlying implementations. In the data contracts of the client façade we have:

- Asi.Soa.Core.Contracts
- Asi.Soa.Commerce.Contracts
- Asi.Soa.Events.Contracts
- Asi.Soa.Fundraising.Contracts
- Asi.Soa.Membership.Contracts
- Asi.Soa.ClientServices
- Asi.Soa.ServiceModelEx

.NET Manager Classes

The following .NET manager classes help you to easily perform common operations on the entities they manage. We recommend taking advantage of these when working in .NET code.

- EntityService – By using the EntityService, you can access anything and everything in SOA.
- EntityManager Class – A proxy for EntityService and provides built in operation methods, such as FindByIdentity or FindAll.
- CartManager Class – The cart manager class provides a wrapper for a cart, and a set of common operations to perform on the cart. The cart itself is a property of the cart manager.

- ComboOrderManager Class – The combo order manager class provides a wrapper for a combo order and a set of common operations to perform on a combo order, for example adding or removing order lines.
- CommerceManager Class – The commerce manager helps find commerce information, such as the price a given party will pay for an item.
- EventManager Class – The event manager class provides a wrapper for an event and a set of common operations to perform on the event. The event itself is a property of the event manager.
- MembershipManager Class – The membership manager class provides a set of common CRUD operations to perform for parties and users.

Authentication

Starting in iMIS 15.1.3 and in all subsequent versions, the custom iMIS application server provider (Asi.Providers.AsiMembershipProvider) is used to authenticate users. All classes of user (Full, Casual, and Public) can be authenticated, including full compatibility with iMIS expiration dates and disabled statuses. A new custom role provider (Asi.Providers.AsiRoleProvider) is used to identify user-role mappings; it supports all iMIS Roles and Groups as well as module access levels and member status.

General authentication strategies by endpoint

There are two primary endpoints supported in iMIS SOA, each with a different authentication mode.

NetTCP endpoint

Out of the box, iMIS will install SOA using the NetTcp endpoint. It uses a binary message format over TCP. The installation creates a new Windows Service that listens by default on port 808. The port may be changed by editing the web.config file. This endpoint allows username-only authentication. That is, it does not require a password. Therefore, access to this service's port should be severely restricted either by firewall rules, configuration of IPSec security rules, or another method – for more information, see the topic Services

Configuration in the latest Helpsite. Connections to this endpoint are secured by Windows Stream Security. This endpoint is primarily intended for application (especially iPart) access, so it only needs to be configured if you have either a remote public or WCM server using SOA-compatible iParts to communicate with the application server.

The following code shows how to connect to the two different endpoints using iMIS SOA Client Services.

In previous releases, you had to define your URI in your code. Now, this can be set up once in the web.config here:

```
 <iMIS>
   ...
   <Soa>
    ...
    <settings>
     ...
     <setting key="EntityManagerDefaultBaseUri" value-
e="net.tcp://imisappserver:808/iMISMain15/NetTcp" />
     <setting key="EntityManagerDefaultEndpointType" value="NetTcp" />
    </settings>
    ...
   </Soa>
   ...
 </iMIS>
```

C# to initialize an entity manager, so that you can access the SOA service:

```
using System;
using Asi.Soa.ClientServices;
```

```
// Connect to the NetTcp endpoint of the iMIS SOA service host
var netTcpSoaServiceHostService = new EntityManager("username", "password");
```

SOAP11 endpoint

SOA also supports a Soap11 endpoint. It uses SOAP 1.1 message format over HTTPS and is enabled by default in the iMIS application server. This endpoint requires authentication by both username and password and is secured using SSL. This endpoint is recommended for B2B type applications (exposing an iMIS application server to third party services etc.) as well as for simplicity, assuming both username and password are known somehow.

Client Library

The ClientServices assembly is first and foremost a client layer façade over the underlying Entity service, but provides several useful components, including:

- A straightforward façade API to the underlying service via the EntityManager.
- Connection management.
- Caching for metadata requests.
- An additional “FindAll” operation.
- Caching for “FindAll” data.

The ClientServices assembly and the EntityManager class provide a client-side proxy for web services, and they include important caching services.

Metadata caching

iMIS SOA provides a BOD like structure for describing entity property characteristics, including prompts. Though the actual metadata is still a thin in many areas, it would still

be relatively inexpensive to provide XML files that describe field-level characteristics of important entities. With metadata for important entities, it would be practical to create an SOA version of smart control that would operate efficiently over the wire. This would improve consistency of application development.

Other caching

As mentioned above, EntityManager provides caching for metadata and simple caching for “FindAll” operations, which are common for many simple table look-up, parameter settings, etc. In addition, the cache manager provided in Asi.Soa.ServiceModelEx is available for ad hoc client caching.

As we go forward on implementing UI over web services, we will look for other needs for caching and create systematic approaches to it.

Using the Client Library (Asi.Soa.ClientServices)

Access to iMIS SOA Web Services for most .NET programmers is going to come through a client library. The ClientLib assembly provides the complete API for accessing iMIS SOA, including service classes and methods, as well as the complete set of data, fault and message contract classes. Key elements of the library include:

EntityManager, MembershipManager - The data service class is the root, key class which is used to access web services. The methods provided in the class generally correspond to the operations that are available from the web services.

Data Contracts - The majority of the classes provided in the client library represent the business objects that are used to access and return data from the service. That would include classes to define persons and organizations, addresses, membership group lists, orders, invoices, etc.

Fault Contracts - Fault contacts define web services equivalent of an exception message.

Using the web client is straightforward:

1. Create an instance of the DataServiceClient.
2. Populate the instance with login credentials.
3. Create and populate objects that will be required by your requested operation.
4. Execute the operation you need via the corresponding method on your DataServiceClient instance, trapping for errors.

   Example:

```
String error = "";
try
{
 string userName = "username";
 string password = "password";
 var entityManager = new EntityManager(userName, password);
 var query = new QueryData("Party")
 {
  Criteria = new CriteriaDataCollection {CriteriaData.Equal("PartyId", "101")}
 };
 var result = entityManager(query);

 foreach (PartyData party in result.Result)
  {
   Console.WriteLine("Party - Id: {0}, Name: {1}", party.PartyId, party.Name);
  }
}
```

```
catch (FaultException<ServiceNotAvailableFault> error)
{
  error = "Service not available.";
}
catch (MessageSecurityException)
{
  error = "Invalid Credentials";
}
catch (Exception error)
{
  error = String.Format("Other error: {0}.", error.Message);
}
```

ClientServices Caching

Caching data on the client improves the performance of iMIS application servers, particularly remote ones. iMIS SOA includes calls to EntityManager to make caching easy to do, and many iParts make caching calls. However, only certain data should be cached, and then often only briefly.

To ensure that data is cached consistently and automatically for numerous entities, SOA uses policy-based caching, versus explicit WithCache calls (now deprecated and ignored). With policy-based caching, each data contract can carry a [CachingPolicy (cacheLifetime)] attribute.

In setting this attribute, keep in mind that caching data can create unexpected outcomes. These are the lifetime values you can set:

Value	Behavior	Default dur-	Typical uses

		ation	
Default	Set for "Medium"	300 seconds, 5 minutes	See "Medium"
DoNotCache	Keep nothing	never	Transactional data
Short	Keep entity a short time, to last across page changes	5 seconds	Volatile but non-transactional data: party, invoice, event registration
Medium	Keep entity a medium time	300 seconds, 5 minutes	Non-transactional, static data: item, group
Sliding	Keep entity semi-permanently; flush if not used for a period of time	1200 seconds, 20 minutes	Very static data, for long-term but only occasional use
Long	Keep entity a long time	3600 seconds, 1 hour	Very static reference values, which can yet change
Permanent	Keep forever	always	Very static reference values, which are needed long-term

Caching Tips

- All high-level, entity-type contracts that you can query have a policy applied: they are registered and carry an [Entity] attribute.
- Contracts that are not marked are handled as DoNotCache.
- EntityManager's Update and Delete calls automatically remove cache values for you.
- Find (by query) calls cache both the Find and the underlying elements.
- Find calls include an optional refreshCache argument so that you can force a refresh of cache data, as needed.

Working with iParts

iParts are the foundation of your iMIS sites that you build with RiSE. This section helps you to understand and master the critical iParts that present attractive and dynamic content to your users.

What are iParts

An iPart is an iMIS-specific web part that represents a building block of features that you can place on a content record with other building blocks to create new pages of features. Multiple iParts can be combined and displayed in a content record as you prefer.

Default iParts appear throughout iMIS. You can modify them for your needs and you can reuse iParts throughout the system. For example, an iPart displaying a roster for a Membership Group can follow the same user behavior patterns as an iPart for a roster in Events.

Configuring iParts

iPart configuration allows you to:

- Define how the iPart will behave
- Control how much access you want end users to have
- Hide configuration details from end users; two instances of the same iPart with different configurations can appear as two different controls to the end user
- Examples:
- Allow users to edit on a staff-facing site, but display the data in read-only mode on a public-facing site
- Use multiple instances of an iPart on one page to access different sets of data

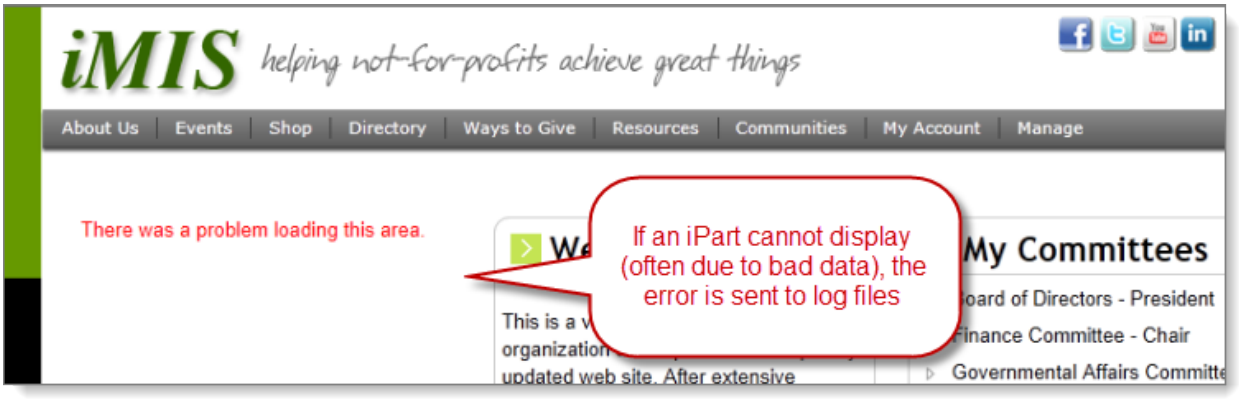
Run-time versus design-time

iParts have two different views:

- Design-time view: What you see in a content record when you add an iPart and configure it.
- Run-time view: What your end-user sees when viewing the iPart within your website. This may differ from what you see in the Design-time view, because some iParts have a different behavior after you publish the content.

Troubleshooting iPart errors

Occasionally, an iPart may fail. However, it will fail gracefully in place, without disabling the whole page. Typically, a “problem loading” error results from some kind of bad data. By default, iMIS hides the error details:



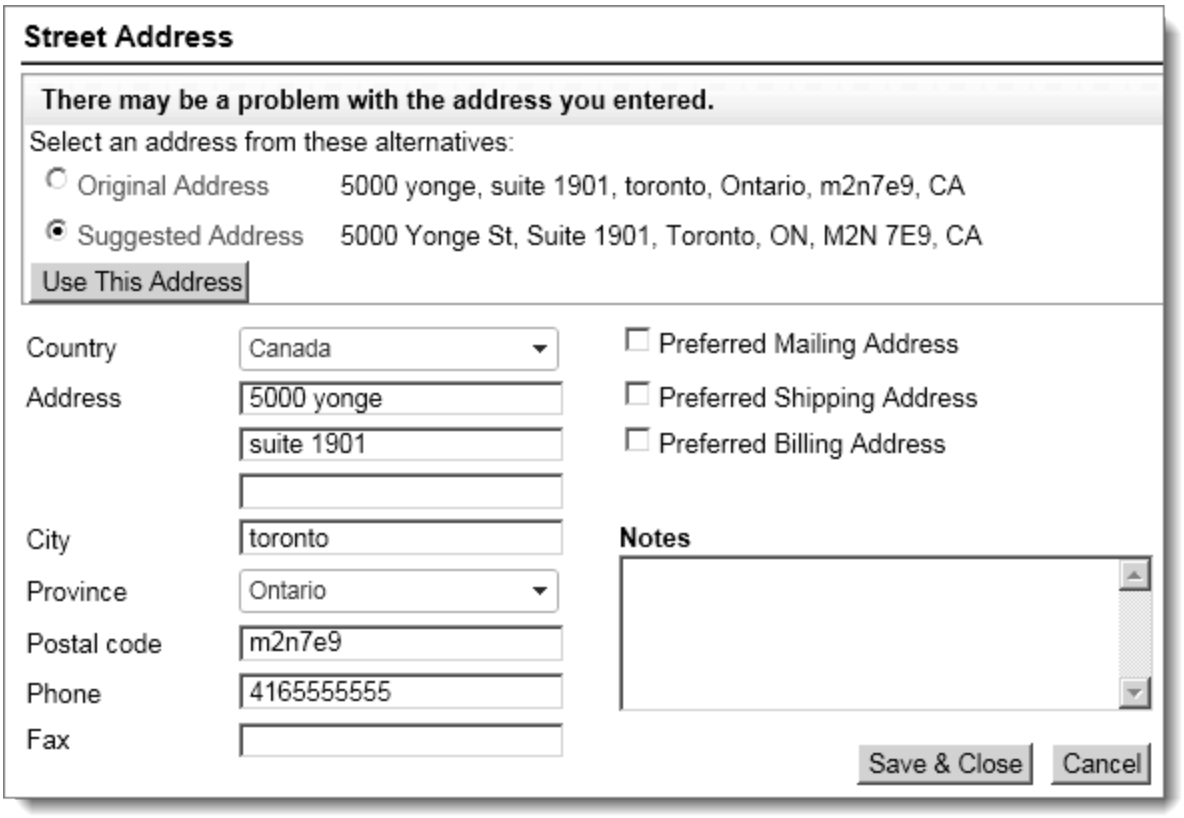
The settings controlling this error logging reside in the <log4net> section of your site’s web.config file. The default settings enable error logging in the Windows Event log and comprehensive logging in the ASI log file, which captures both errors and warnings. This log file, Asi.WebRoot.log, is in the folder above your website root.

Contact your hosting administrator if you need access to information in these logs.

Address verification for iParts

iMIS SOA can perform real-time address verification using web services hosted by ASI. There are several benefits to this:

- Running this verification through the ASI web service frees you from having to install and maintain these data files locally.
- Offloading verification to this service keeps it from adding to the processing load of your page.
- The services of different address providers can co-exist, making it possible to verify addresses across multiple countries.
- The service can support future verification of collections of addresses as well as single ones.
- Postal addresses entered in the Contact Account Creator and Contact Address Editor iParts automatically upload to this service that verifies and standardizes the address. Users can then either accept the suggested address or keep the original as it was entered.



The countries supported by this service are subject to change. Contact your AiSP to obtain an up-to-date list.

Passing URL Parameters

Many iParts allow you to change the content they display based on the value of a URL parameter. This gives you the freedom to create a single content record. This record can be reused and the display can be changed based on a value sent in a link to the page. For example, instead of creating a new content record for every event, you can reuse a single content record that displays different event information based on the EventKey value in the URL.

Parameter values are passed to iParts from a several types of sources:

- Search result links
- IQA query links
- Navigation items
- Relative links
- Absolute links

For any iPart that allows URL parameters to be passed, see the configuration help file for detailed instructions.

Tip: If multiple values are sent to a page for a single URL parameter, the first parameter value wins. For example, if the URL pointing to the Event Display iPart is http://my-org/Events/Event_Display.aspx?EventKey=SPR12&EventKey=FALL12, only the SPR12 event displays.

Note: URL parameters set by navigation items cannot be manually overridden in the URL. A user cannot change the parameter value in the URL to display different content.

Specifying commit sequence

If you place more than one iPart on a page, you might need to specify the order in which actions occur on that page. The commit sequence function allows you to explicitly define

the execution order of multiple iParts in a content record.

You can define a commit sequence value for the processing order of each iPart relative to the other iParts in the same content record. The commit sequence value must be zero or greater. iParts with a value of zero (the default) are processed after any other iParts with a non-zero commit sequence value that are in the same content record.

Setting a commit sequence is only required in a few scenarios and is noted in an iPart's configuration help if needed.

Security for iParts

Most security is defined at the content record level within iMIS. You can choose that different iParts display for different users. For example, an unauthorized user might see the description of a Special Interest Group, but a signed-in member might see the roster for the group and a staff person might have the privilege to add, edit, or delete the group.

iPart Examples

-
-

Displaying query results in iParts

The iParts described in this section use IQA queries to drive the data displayed to users. Each iPart provides a unique way to display the data.

Query Chart Viewer iPart

The Query Chart Viewer displays query results in a chart, which can be set to a range of sizes, skins, and chart types.

Designing queries for Query Chart Viewer

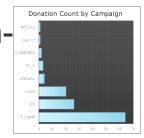
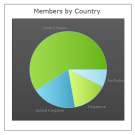
The Query Chart Viewer can render any existing query, but you will get the best results by following these guidelines on how to design queries specifically for use with this iPart:

- Queries: The queries you create for the iPart should be structured so that the results are appropriate for charting. For example, if you want the chart to display the total sales per salesperson, then the source query should be written using the Sum function in IQA.
- Query Display Columns: Each property you select on the Display tab in IQA is available in the iPart's configuration page as a Data column display option. Note, however, that you can only select two properties to be displayed in the iPart.
- Aliases: In your source query, enter an Alias for the Display properties you plan to show in the iPart. Relying on the default labels may not be sufficient, especially when your query uses multiple joined sources or custom SQL expressions. If the query does not display as you expect, using an Alias often resolves the issue.
- Sorting: You can sort the query results displayed in your chart in ascending or descending order. To sort your results, edit your source query and, from the Sorting tab, add the property to be sorted.
- Labels: The labels on your chart's x-axis may overlap if there are too many data points or if the labels are too long. You may be able to improve the display through a few methods. In the iPart, you can expand the width of the chart or change the label angle. In the query, you can try to reduce the number of data points.

- Dates: For dates to display correctly, you must cast them as float data types with an offset of 2. You can do this in IQA from the Custom SQL Expression section of the (Display tab). For example, if you want to display the OrderDate property in your chart, add the following expression: CAST(OrderDate AS FLOAT) + 2. Then, when you select this property from the Data column list in your iPart, set the Data column format to a date format.
- Integers: If integers display incorrectly in your chart, cast the column to a data type of INT in the Custom SQL Expression section of IQA's Display tab. For example: CAST (OrderCount AS INT).

Chart Types

You can display the following types of charts in the Query Chart Viewer iPart.

Chart Type	Example
Area - Displays data in an area filled with color to illustrate trends. For example, create an area chart that shows a member's giving history over time. Note: You can only display one area of data in the iMIS Area chart.	
Bar - Horizontal - Displays sets of data with horizontal rectangular bars for comparison. For example, create a horizontal bar chart that shows the number of donations received by each of your fundraising campaigns.	
Bar - Vertical - Displays sets of data with vertical rectangular bars for comparison. For example, create a vertical bar chart that shows the distribution of your members across states.	
Bubble - Displays data as a series of bubbles. For example, create a bubble chart to show the total number of function registrations for an upcoming conference. Note: You cannot assign a size value to the bubbles in the iMIS Bubble chart.	
Line - Displays data as a series of data points connected by a line to illustrate trends. For example, create a line chart that shows a member's giving history over time.	
Pie - Displays data in a circular chart divided into sections to illustrate proportion. For example, create a pie chart that shows the proportions of your	

members by country.

Query Menu iPart

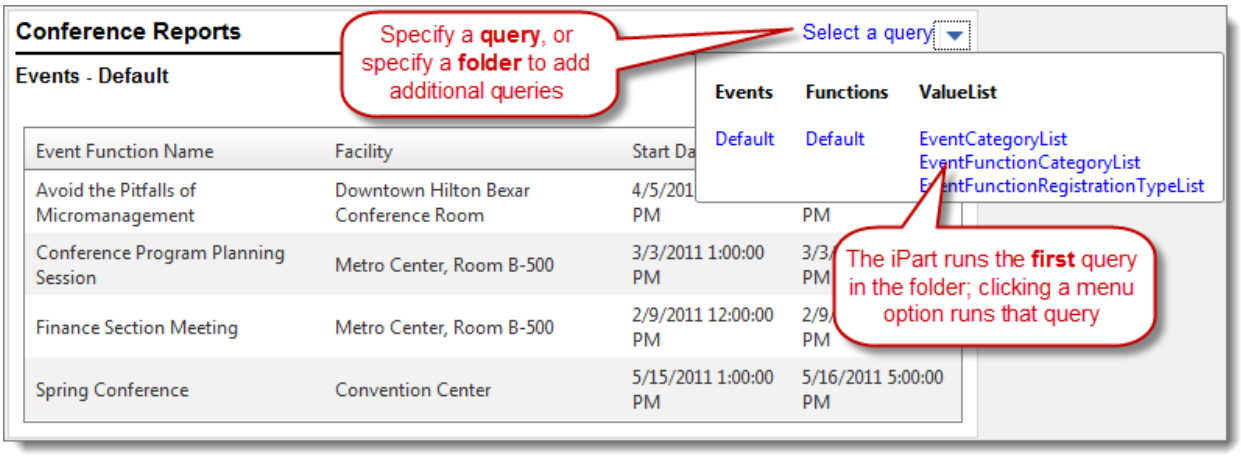
The Query Menu iPart lets you merge query results into your site for tremendous utility. You can set the iPart to display a query, set with whatever title, parameters, columns, labels, and sorting you need, and you can enable exports, which adds icons for sending the data to Word, Excel, PDF, and CSV.

Who is attending?

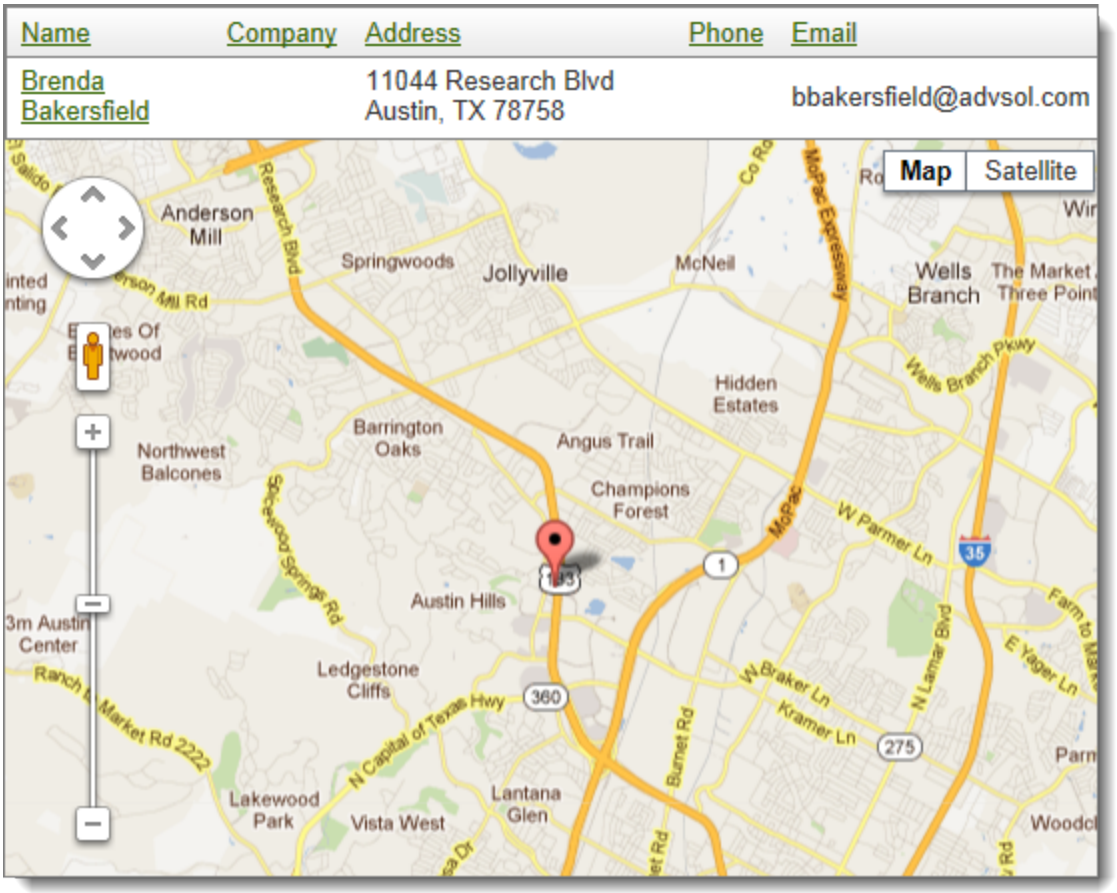
Conference Planning Roster

Registrant	Organization	Title
Hon. Douglas M. Kramer		Representative, State Legislature
Carly L. Kowalski	GEO International	Executive Director
Cecile M. Faciques, CAE	International Association of Business Interests	Director
Charles P. Yusif	International Association of Business Interests	Manager, Education
Steven W. Carlson, CPA	Opus, Inc.	Controller
Sonya Gallora	Publications, Etc.	Executive Officer

You can also organize helpful queries into a folder and point the iPart to that folder. When the page loads, the iPart displays the first query at the top of that folder, and it presents a drop-down menu of additional queries available, organizing them by subfolders, if any. When the user clicks on a query from the menu, the iPart immediately runs that query and displays the results.



If the query selected contains an address property, you can configure the iPart to automatically map the query results when an address is available. Only one address property per query can be mapped. When this option is enabled, the iPart looks for the following address properties in this order and maps the first one it finds: FullAddress, Address, FullAddressText, AddressText, Address Text, and Full Address Text.



Related Items iPart

With the Related Items iPart, you can display a list of profile or product pictures based on the results of an IQA query. For example, you can write a query to display the profile pictures of everyone who has registered for an event, made a donation, or ordered a particular product, or to display products in the same category. You can configure the list to display horizontally or vertically, to display a name for the item, and to choose the size of the image. You also have the option to make the profile picture a live link that opens a URL of your choosing, such as the member profile page.

Guidelines for working with the Related Items iPart

- The pictures displayed in the iPart are based on iMIS product or contact IDs. When creating the query for this iPart in IQA, you must select a property that returns an iMIS product or contact ID on the (Display tab). Give this property an Alias of key_Id (the Alias is case sensitive).
- To define the image to display for each record, include a column in your query that specifies the image file name for that record. Give this property an Alias of Image.
- To display a name for each record, include a column in your query for the name of the item or contact. Give this property an Alias of Name.
- When you add Display columns to the query in IQA, they become available within the iPart as Filter columns to filter on.
- You can dynamically filter the query results displayed in the iPart based on the value of another iPart's URL parameter. For example, you can set up your donation page to display the profile pictures of people that have donated to a particular cause (called a distribution in iMIS). The Donation Creator iPart uses the URL parameter itemid to determine which distribution the donation should go towards. If you add your iPart to the same content record as the Donation Creator, then you can set up the Related Items iPart to look at the value of itemid to determine which profile pictures to display. You just have to make sure that your query includes the CsActivity.Product Code property, so that you can select it as a Filter column on the iPart's configuration page. Once selected, enter

itemid for the Filter on URL parameter, so that the iPart knows to filter the results based on that URL parameter's value.

Example: Display other products in the same category

In this example, the Related Items iPart is set up to display clickable images for other products in the same category as a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

   Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > RelatedItems. Select RelatedProducts.
4. Filter Options dropdown, select ProductCategory. ProductClassKey.
5. Filter on URL parameter, type in Category.Class.
6. For the Items link to (URL or shortcut), type in ItemDetail?iProductCode={key_Id}&Category={ProductCategory}.ItemDetail?iProductID={key_Id}&Class={ProductClassKey}. This uses the ItemDetail shortcut to link each item in the list to the product page. The particular item's product ID and category are specified in URL parameters so that the correct product and related products are displayed in the resulting product page.
7. Click Save & Publish to complete the content record.

   Example: Display other users who have purchased a product

In this example, the Related Items iPart is set up to display clickable profile pictures of other users who have bought a particular product. This example uses content installed for the sample Member site.

Go to Content Designer > Manage Content:

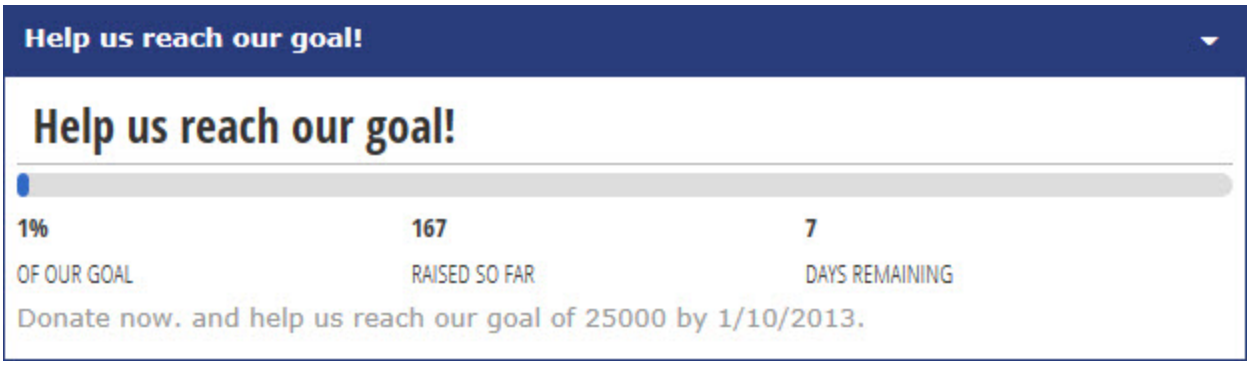
1. Click Core Content > Shop > StoreLayouts > Item Detail. open the Core Content > Commerce folder and edit the Product Display content record.

   Note: The Item Detail content record displays product pages in the Member sample site's Shop. The product displayed is based on the value of the URL parameter iProductCode. iProductID.

2. Click add content > Content Types > Utility > Related Items.
3. For the Source query, click select. Navigate to $ > Samples > QueryProfilePictureList. Select Orders.
4. Filter column dropdown, select ProductCode.
5. Filter on URL parameter, type in iProductCode. iProductID.
6. For the Items link to (URL or shortcut), type in MBR/Party.aspx. This redirector web page looks for an ID in the URL parameter and then checks the ID's party type and the user's permissions to determine which content record to display. The user's ID is appended to any URL specified in this field.
7. Click Save & Publish to complete the content record.

Progress Tracker iPart

With the Progress Tracker iPart, you can visually display progress towards a goal based on the results of an IQA query. For example, connect this iPart to a fundraising query, so that your members can easily track the progress of a fundraising effort towards a specific goal. Or connect it to an events query, so that you can see at a glance how many people have registered for an event.



To set up the Progress Tracker

1. Create a query for the Progress Tracker.

   Note: For sample queries that will work with this iPart, see $/Samples/ProgressTracker/ in IQA.

   The Progress Tracker uses three pieces of information supplied by an IQA query: a goal amount, the sum total of what you are tracking, and the end date (which is optional). When you build your query for this iPart, it must contain specific aliases. In IQA, create a new query and choose the business object you want to query on. Make sure you are in Advanced Mode, then from the Display tab, choose properties to assign the following aliases to:

- Goal_Amount: Indicates which property is the goal amount. You can apply this alias to a property of a business object, or apply it to a Custom SQL Expression property. For example, add CAST(25000 AS INT) as a property to set the goal amount to 25,000.
- Sum_Total: Indicates which property is the amount to be summed. The percentage displayed in the Progress Tracker is based on this amount compared to the goal. It can be a monetary amount or any other number, such as the number of event registrations.

  Tip: From the Function dropdown list for this property, select Sum, so that only one row is sent to the iPart. This is not required, but it will improve performance.
- End_Date: Indicates which property specifies the end date. This alias is only required if you want to display an end date in the iPart. You can apply this alias to a property of a

business object, or apply it to a Custom SQL Expression property. For example, add CAST('2012-12-25' AS DATE) as a property to set the end date to 25 December, 2012.

2. Add the iPart to a content record and configure it.

   Go to RiSE > Content designer > Manage content:

1. Do one of the following:

- Select a Content Folder and click Edit.
- Select New > Website Content.

2. Click add content.
3. Go to ContentTypes > Utility.
4. Select Progress Tracker.
5. Click OK.
6. Enter the iPart CSS class to style the Progress Tracker. Two styles have been pre-defined that you can use in the iPart: ProgressTracker and ProgressTracker2. You can edit these classes to change the look and feel, or you can create your own style for the Progress Tracker.
7. Select a Source query.
8. (optional) Select a data column by which you want to filter. You can use this feature to dynamically update your Progress Tracker, based on the value passed to it in the URL. If you choose to filter on a data column, then also enter the name of the URL parameter, which the iPart uses to identify the value to filter on. For example, to limit the results of an event query to a specific event, you can select the EventCode property and give the URL parameter a name such as EventCode. The progress displayed will then reflect only the event code which is included in the URL as EventCode=[EventCodeValue].
9. (optional) Enter any messages you want to appear in the iPart. The variables below can be used in the descriptions. For example, "Help us reach our goal of {0} new members by {2}!"

- {0} displays the goal total
- {1} displays the current sum total or count
- {2} displays the end date in a long format
- {3} displays the end date in a short format

10. Select the Caption Options. In addition to the progress bar, you can also display the values as text. If any of the Caption Options are unavailable after selecting a query, this indicates that the required aliases have not been defined in the query.
11. Select the Progress bar location. The bar can be displayed above or below the captions.

    Note: You can also use this iPart to display only a countdown (days remaining to a certain date). In configuration, only select the caption option Display days remaining, then for the Progress bar location, select (None).
12. Click OK.

SSRS Report iPart

The SSRS Report iPart lets you display the results of any IQA query on any page where you place it. The SSRS iPart uses the version 10.0 ReportViewer, which supports IE8 natively and, in IE8, adds a Print button on its toolbar. You can add the SSRS iPart to any content page using CM: open the Utility folder and choose the content type SSRS Report.

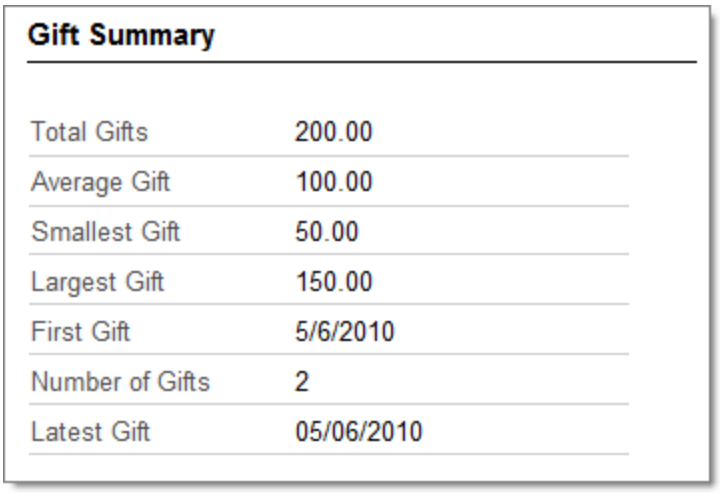
The iPart lets you customize whether to display the export buttons for PDF and Excel versions of the report. You can change the default design (layout, colors, fonts) of your reports by editing the SSRS parameters in the SystemConfig table.

How it works: The process engine specified by the iPart loads a report template (.RDL file) from the document system and creates a report data source (a DataTable) based on an IQA query's SQL source; the report viewer then combines the template and query to generate the report's output. When you configure the iPart, you specify the Document system path to the SSRS Report runtime, which must be a link to an SSRS Process Engine. Click the select link next to the textbox, then browse to your reports (such as $/Samples/ReportingServices), and pick one of the runtime entries.

Tip: Identify a process engine (run-time report) by the arrow on its icon!

Summary Display iPart

The Summary Display iPart displays a single row of query results in a form view.



Gift Summary

Total Gifts	200.00
Average Gift	100.00
Smallest Gift	50.00
Largest Gift	150.00
First Gift	5/6/2010
Number of Gifts	2
Latest Gift	05/06/2010

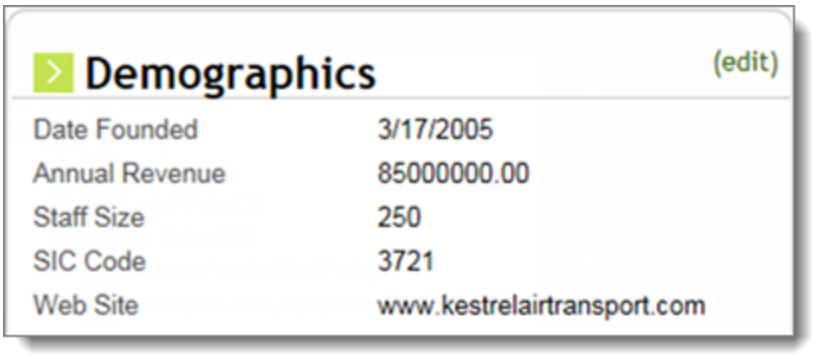
Guidelines for queries displayed in the Summary Display iPart

When creating a query that you want to display in the Summary Display iPart, keep the following guidelines in mind:

- This iPart only displays a single row of query results.
- If you connect the iPart to a query that returns more than one row of results, only the first row is displayed.
- Tip: You can dynamically filter your query results by the currently logged in user, a selected contact, or a date. See Adding dynamic filters to queries for more information.

Panels and custom data

Panels are custom displays of iMIS data that you are able to name, build, arrange in grids, and add to your site. Using panels, your users can browse, edit, add, and delete their data, as you specify:



Panels display within Panel iParts, which allows your users view and edit custom data on the broadest range of browser and platform types that iMIS supports. You can manage your custom data directly and conveniently from the web pages where you place these iParts:

- Panel Editor (which creates panels and shows one panel) --
- Panel Collection Editor (which combines existing panels into tabbed displays)

You can configure the iParts to let your users add and edit that data directly from their browser page. You can import your existing user-defined tables (from iMIS Customizer) directly from the Panel Editor iPart configuration. In addition, your Activity table data is automatically available as a source, so that you can use and extend that data. Panel sources can include existing user-defined tables (defined in the UD_Table table) and user-defined sources (listed in the ObjectMetaData table).

Tip: Panels are shared: when you update one panel, it updates within every iPart that uses it.

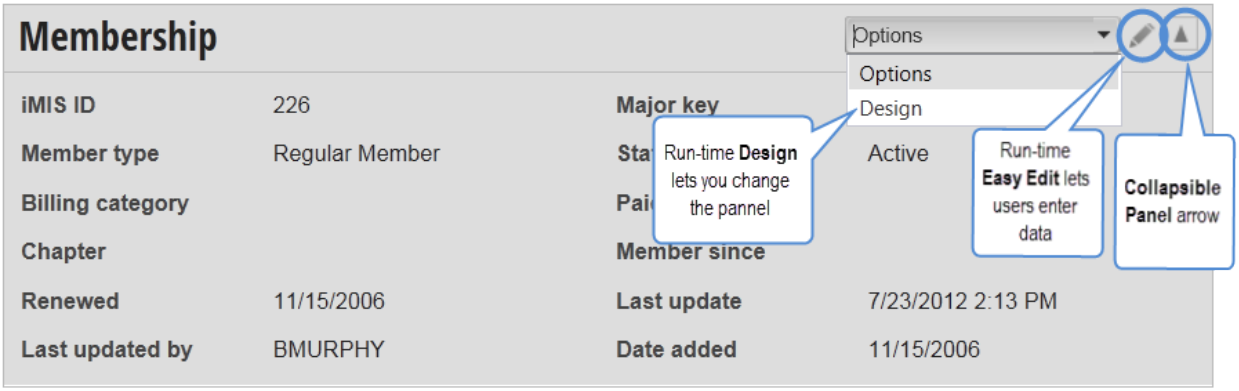
Creating custom panels of data

In a few clicks from your browser, you can have a new panel that displays the data you want, labeled and made editable as you need.

1. Enable Easy Edit by clicking on the button at the top right hand corner of the screen.
2. Once Easy Edit has been enabled, you will find and click the icon at the bottom left corner; this is the Content Designer.

3. From the Content Designer, click add content > ContentTypes > Content > Panel Editor
4. Select (New Panel) from the Panel drop-down menu.
5. Drag in and arrange your desired data, then Save & Publish.

   Once you have placed a panel iPart into a content record and published it, you can then edit the panel directly: As a system administrator, you see a run-time Design command, which lets you make quick changes to the panel, changes that save and publish for you automatically. For extensive panel work, such as to change the type of data it shows, use Easy Edit to access all of the content design features.



   Best practices for panel layout

   Here are key layout features to help you design the best use of screen real estate on the page:

- Multiple columns: Click + or – icons next to the panel layout to add/remove columns in your panel. For best display results, place multi-column panels into single-column content records.
- Hide in Summary View: Check this box on certain properties to trim the initial display of the iPart to the read-only information that is most useful. Only when users open the full window for viewing or adding/editing (as you configured it) do they see the additional information.
- Read-only: Check this box to provide information in read-only form while still allowing users to edit other information on the panel.

Tip: To prevent editing of all of the properties, simply disable Allow users to edit on the iPart Configuration, rather than in the Panel definition.

- Collapsible panel: In order to maximize utility and minimize scrolling on the page, users are able to click on the arrow to expand and collapse iParts.

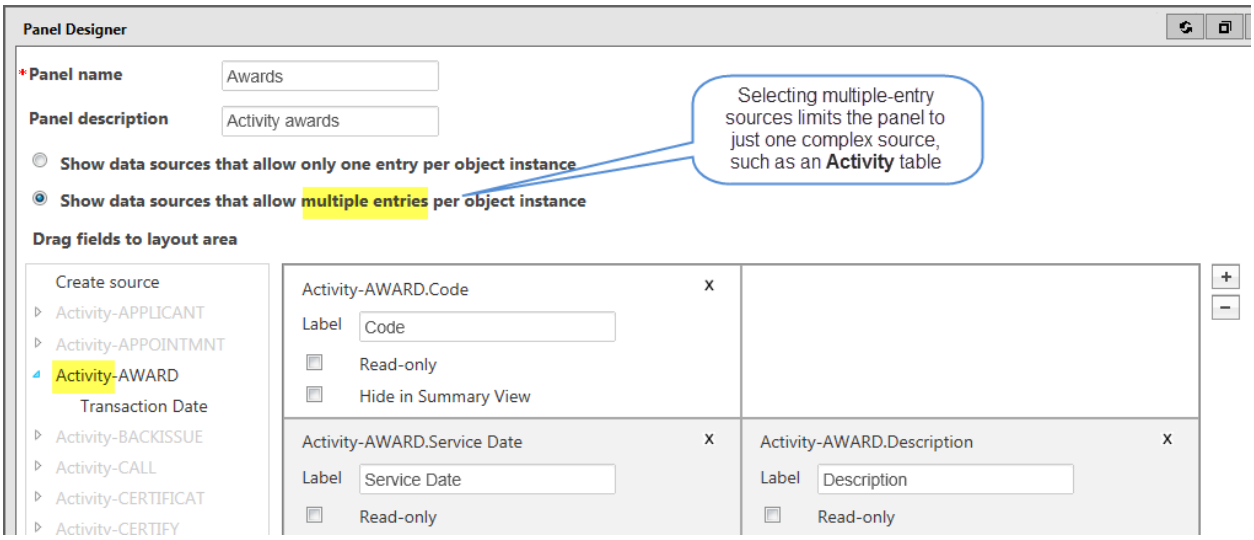
  Tip: Be sure to add an optional Title to any iPart that you make collapsible, so that title bar text guides your users as to what information they will access by clicking Show.

  Panels for Activity data

  Most organizations need to show activity information on their websites. All of the Activity data in your iMIS database appears as complex (multi-entry) sources when you use Panels.

  Suppose you created new award types in the general lookup table called AWARDS and want to add them to a page for dynamic editing. In a few clicks, you can have exactly that:

1. Enable surf-to-edit.
2. Click add content.
3. Go to ContentTypes > Panel Editor.
4. Click OK.
5. In the Panel list, select (New panel).
6. Select Show data sources that allow multiple entries per object instance.
7. Drag in your new data sources.
8. Click Save & Close.
9. Select Allow users to edit.
10. Click OK.
11. Click Save & Publish.



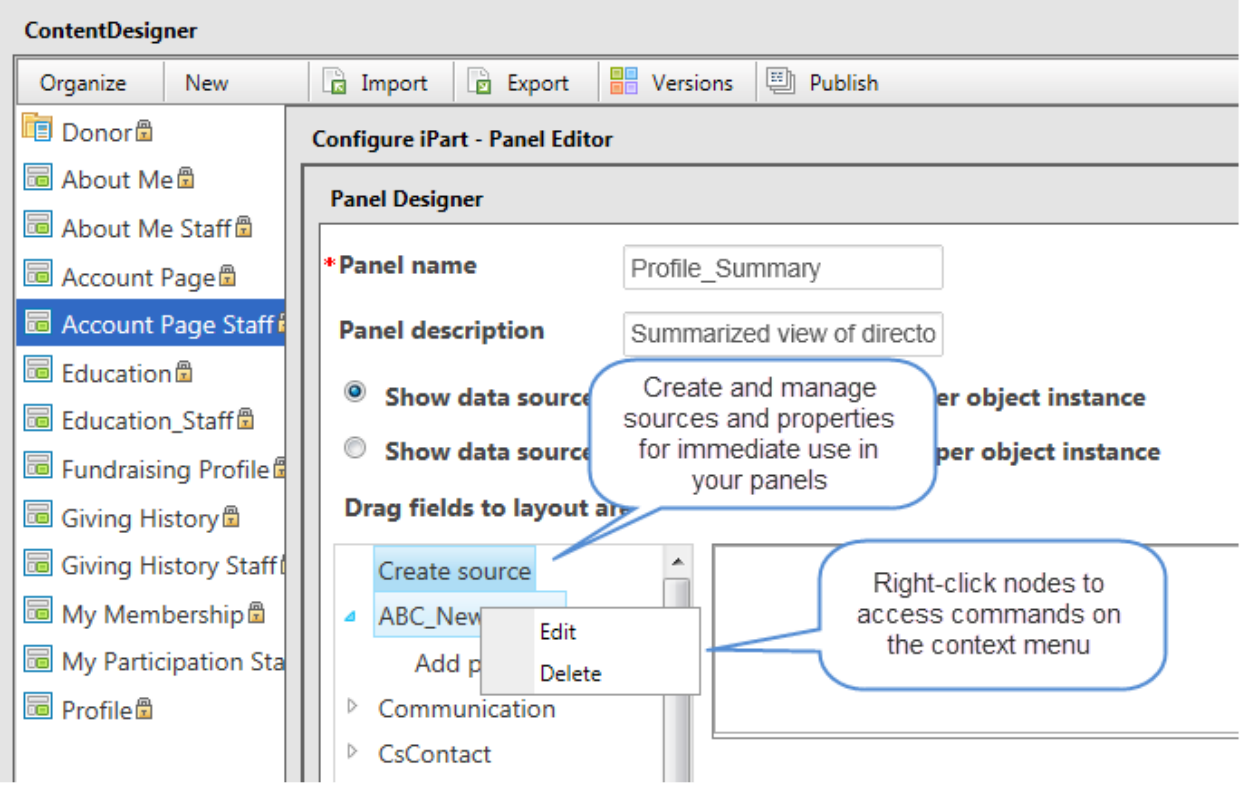
All of your Activity data appears as available sources when you select multiple entries for the type of data source.

Tip: If you want to combine data from different sources, be sure to show simple sources (the first radio button option). Only one complex table can display in a panel, so the others are grayed out as long as any one of them has properties placed in the panel.

Defining your own data with Panel Designer

With the Panel Designer, you can not only craft reusable panels that combine fields from many tables, but you can also define new data structures (business objects and properties) to manage information for your organization. Without special tools or knowledge of the iMIS schema, you can add data sources on the fly, right from your browser. When you save the panel, you have saved your newly created data sources as iMIS business objects.

Tip: You can see your new data source show up as a business object in Business Object Designer, but it will be read-only: continue to edit and manage these special sources in Panel Designer itself.



Access the Panel Designer by editing or creating a panel in a Panel Editor iPart.

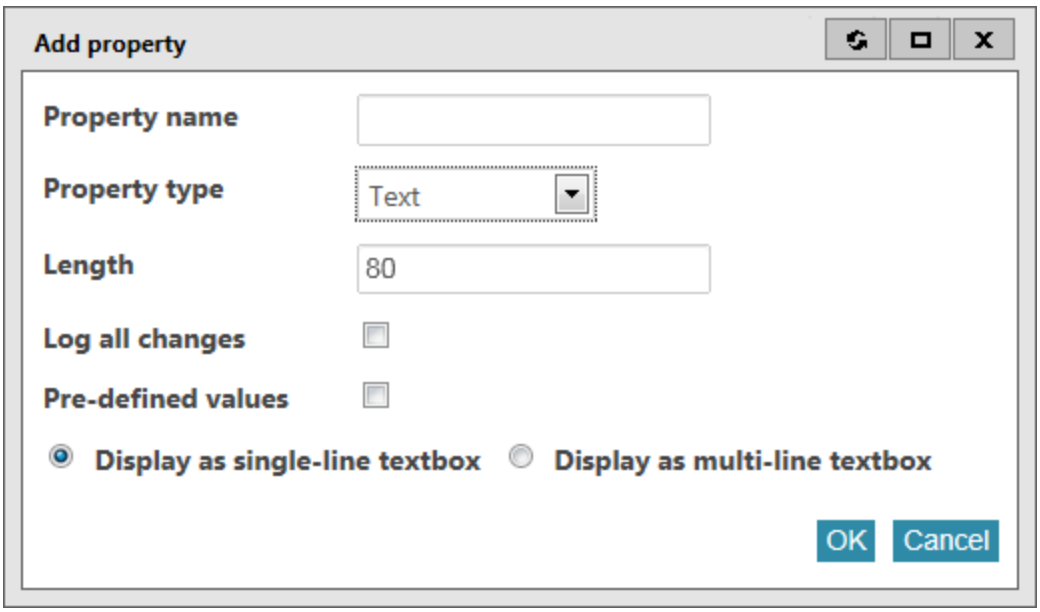
To create a new panel source and properties

To create your own data source with properties, you work within Panel Designer. Each new source you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

1. Select New > Website Content.
2. Click add content.
3. Go to ContentTypes > Content.
4. Select Panel Editor.
5. Click OK.
6. From the Panel drop-down list, select (New panel).
7. At the top of the source tree, select Create Source.

8. Choose a Name for each new Source that meets these criteria and click OK:
   - Starts with a letter
   - Contains only letters, numbers, and underscores
   - Is unique across iMIS, not matching any existing iMIS data or SQL Reserved Words

     Tip: Use an organizational prefix (such as ABC_*) so that your sources are unique, sort together in the tree view, and are easy to identify as ones that you created.
9. Select Add Property for the new source added.



10. Enter a Property Name.
    - Starts with a letter
    - Contains only letters, numbers, and underscores
    - Is unique within its Source
11. Choose a property type that best fits your purpose, within these valid ranges:
    - Currency: 19 total digits (precision), with 4 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
    - Date, Date and Time, Time: January 1st, 1753, through December 31st, 9999

- Decimal: 28 total digits (precision), with 12 digits to the right of the decimal point (scale). The default masking shows 2 decimal places.
- Email: Creates a mailto link, which launches the user's default mail application when selected.
- Integer: -2,147,483,648 to 2,147,483,647 (±2 billion)
- Text: By default, the Text Property type allows:
- Free-form entry up to 400 characters (defaults to 80). You can select to display the text-box as a single line or multi-line textbox.
- Pre-defined values from a query or explicit list that display as a drop-down list at runtime:
- Query – For example, you may want to use a query that returns a list of countries.
- Explicit List – For example, you can add a list of colors the user can select as their favorite.
- URL: Creates a live hyperlink, which launches a new instance of the browser to open the link when selected.
- Yes/No: Boolean

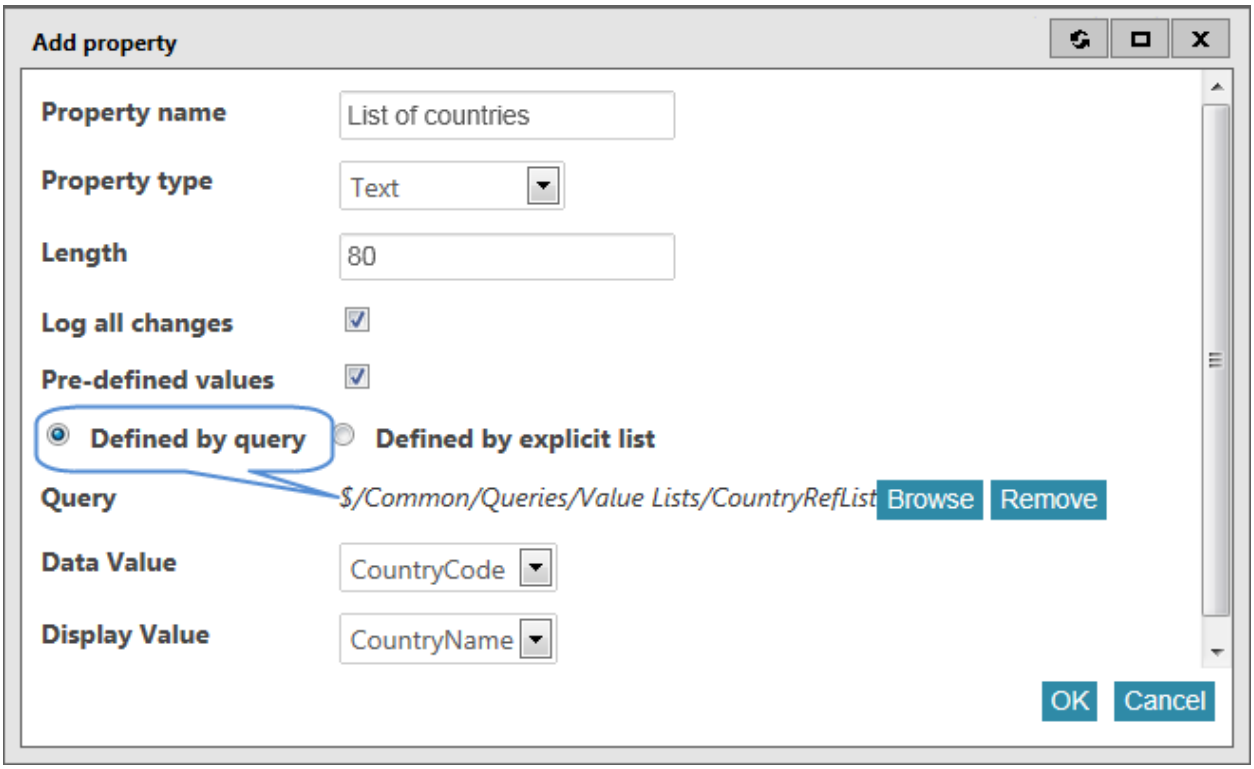
12. Enable the Log all changes if you want to track any data change made to the property you are adding.

    Hint: Add the Change History Display iPart to a content record if you want to display data changes made in the Name and Name_Fin tables as well business objects.

13. (Text Property type only) The Pre-defined values option allows you to present a list from which the user can select.

    - The Query option provides validation-type properties based on the query results. For example, instead of typing out a list of countries, you could select a query that displays country values.
    - Enable the Pre-defined values checkbox and select the Defined by query option.
    - Click Browse, select a query, and click OK.

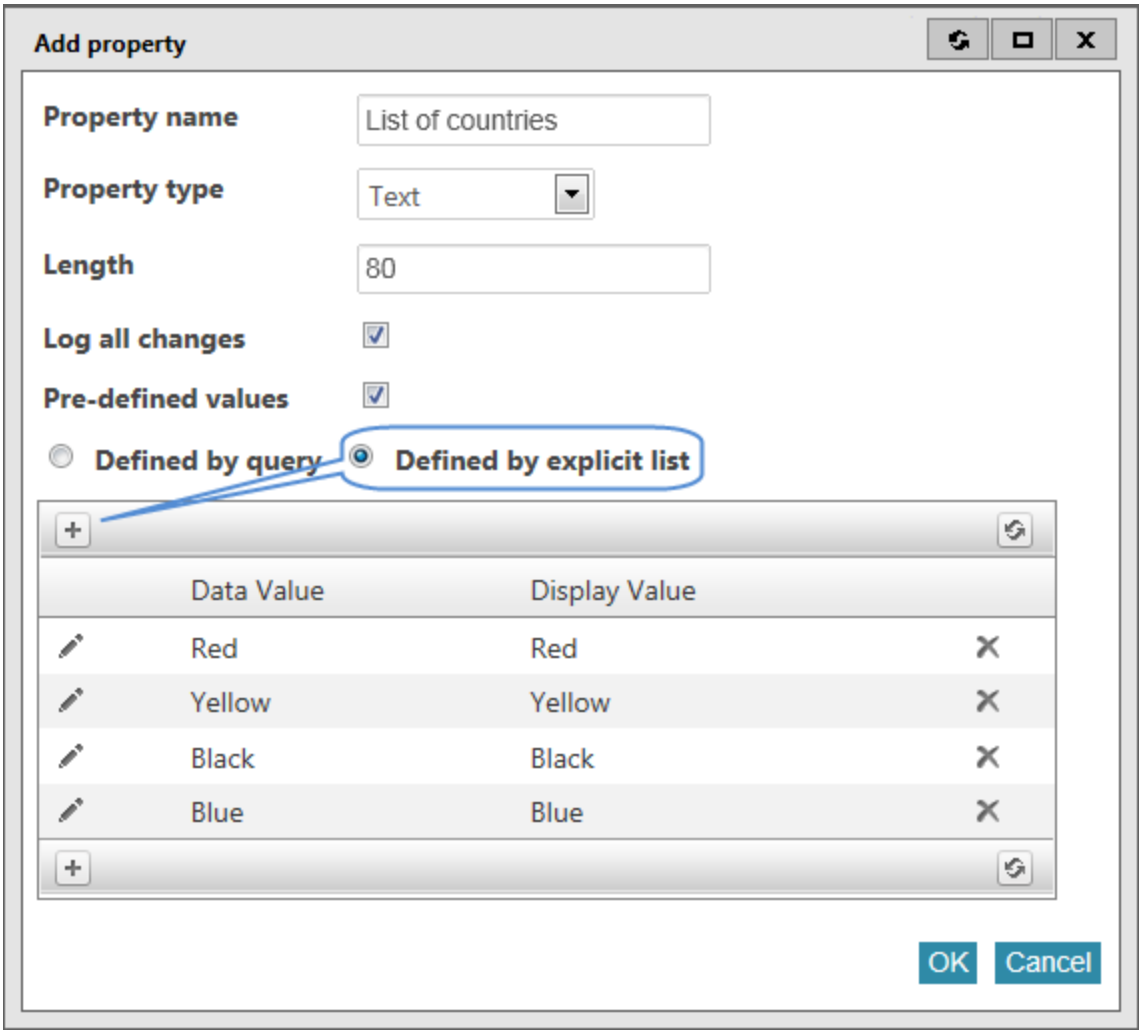
- Two additional fields display, Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a selection on the panel. While these values can be same, you may want to choose a different value to display on the panel. For example, the country code may not be as clear as the country name.
- Select the fields from the drop-down list in the Data Value and Display Value fields.
- Click OK.



- The Explicit List option allows you to create a list to display on the panel. For example, you may want a user to select their favorite color.
- Enable the Pre-defined values checkbox and select the Defined by explicit option. A table grid displays.
- Click + to add a data row. The data row contains two icons: Insert and Cancel, and two fields: Data Value and Display Value. The Data Value is the field you want saved in the database. The Display Value is the field you want displayed in the list presented as a

selection on the panel. While these values can be same, you may want to choose a different value to display on the panel.

- Enter the appropriate values in the Data Value and Display Value fields.
- Click the checkmark located to the left of the data row.
- Click + to add additional data rows.
- Click OK.



14. Drag the field(s) to the layout area.
15. Save the panel to save the source and properties. Once you save a property, you cannot rename it. Note that the sources will alphabetize properly on reopening.

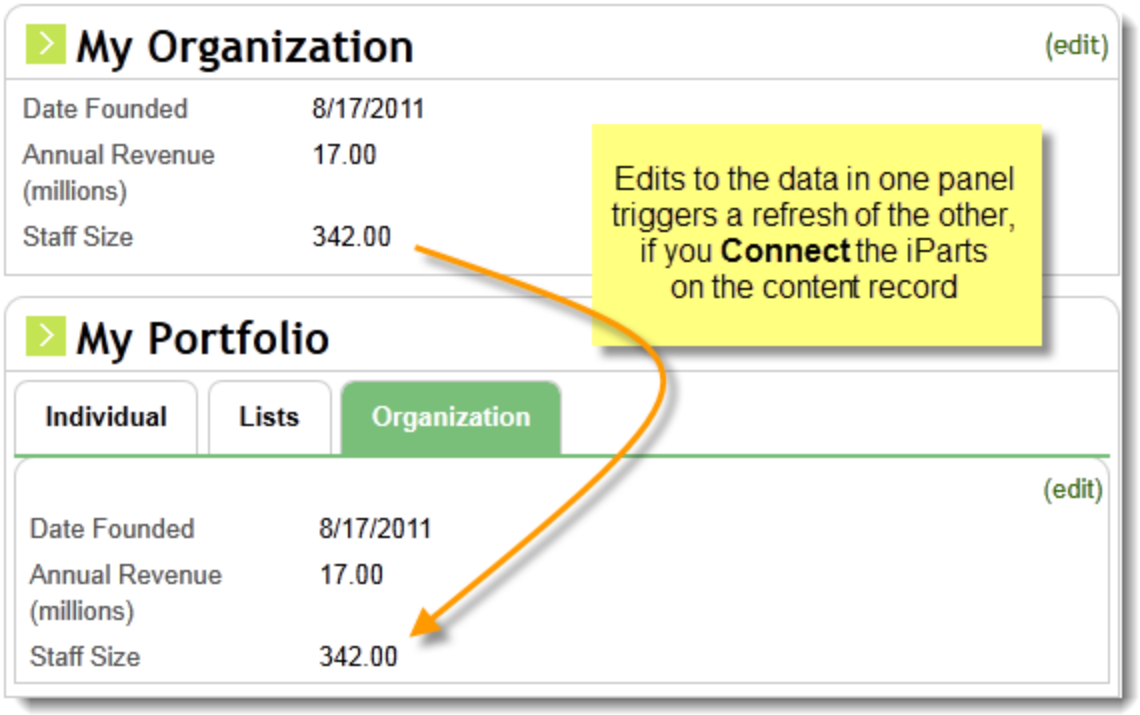
Each new property you create is available for immediate use in the current panel, but it is not limited to it: when you Save the panel, that new business object property is saved into iMIS for use throughout the system. Once you save it, you cannot rename it.

Tip: Do not save until you create all of the properties. This way, you can view them as a set of properties and improve your naming convention before it is finalized.

16. Save and close the Panel Designer window.
17. Save & Publish the content record.

Connecting iParts to refresh panels

When you combine panel-displaying iParts on the same content record, data might appear out of sync after the user edits it, if both panels display the same property. You can solve this refresh problem through the iPart's Connect feature, which you enable separately from Configure.



Note: Check an iPart's Configuration Help topic to find out if it supports any connection options. An iPart has no connection support (neither consumer nor provider) unless its author added it.

To connect panels for dynamic updating

1. Edit a content record and add two user-editable iParts that display panels (Panel Editor, Panel Collection Editor).
2. Set up the first connection:

- From the first iPart's title-bar menu, select Connect.

  The Connect box that opens shows you any current connections and lets you disconnect them.

- Select Create a new connection.

  The Connect box that pops up prompts you to create one of four connection types.

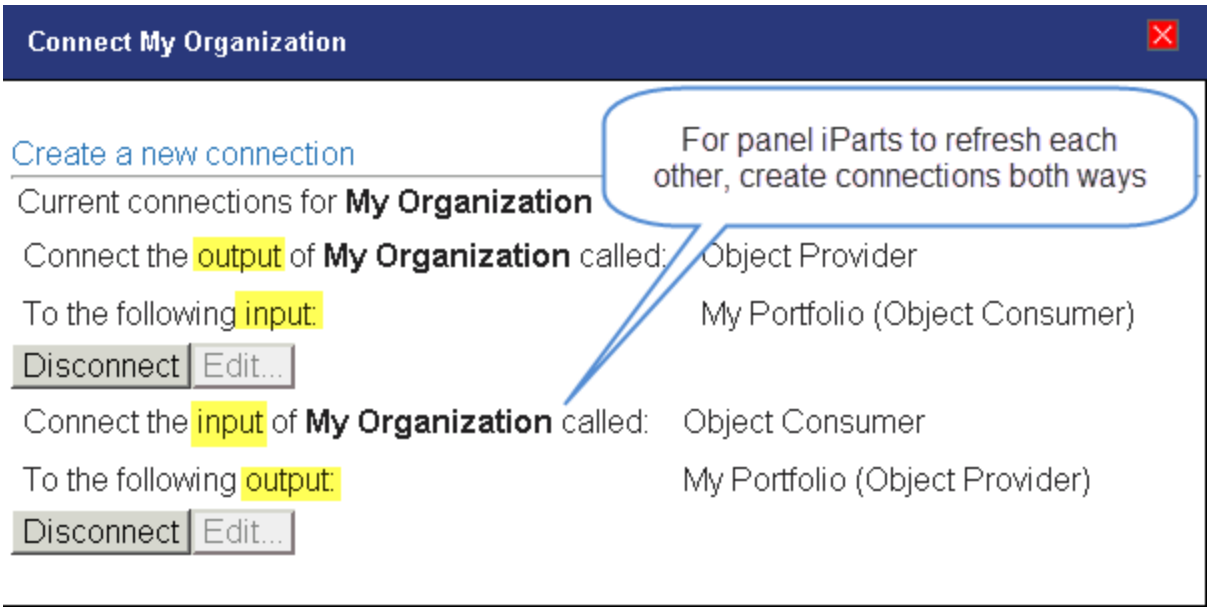
  Tip: Do not be misled by the language of connection. The Consumer is the actor that triggers a refresh on another iPart, and the Provider provides a pointer to itself to the Consumer.

- From the Object Consumer drop list, select the panel iPart you want to refresh.
- Select Connect.

3. Set up the second connection:

- From the second iPart's title-bar menu, select Connect, and select Create a new connection.
- From the Object Consumer drop list, select the first iPart.
- Select Connect.

  You should see a pair of connections, for mutual refreshing.



4. Save and Publish the content record.

Adding existing business objects to panels

Panel Designer lets you create new data sources on the fly, access any user-defined tables, and make full use of the Activity table. It can also display your existing business objects, if they meet these requirements and configuration settings:

Referencing existing business objects

Panel Designer can display existing business objects that have a ContactKey or ID property. When ContactKey or ID is the primary key, Panel Designer treats it as a single-instance table; otherwise, it assumes it to be multi-instance.

Panel Designer cannot display your business objects until you add them to the ObjectMetaData table. While attached to the iMIS database in SQL Server Management Studio, run this SQL statement:

INSERT INTO [dbo].[ObjectMetaData] (ObjectName, RelatedToEntity, IsUserDefined, IsMultiInstance)

VALUES ('MyObject', 'Party', 0, 0)

- Replace MyObject with the name of the business object, table, or view that is related to Party.
- Change the last value to 1 if it is multi-instance.

Settings for Business Object Designer (BOD)

1. In Business Object Designer, edit your object and open the BOD (Properties tab) > (Display tab).
2. To make a property available to your panels, enable its Available to UI? option.

   Tip: To see your BOD changes immediately, restart IIS.
3. To enable multiple selection for a property, select Check box(es) under Display Control so that you can enable the Allow multiple selection? option.
4. To enable HTML editing, select HTML Editor under Display Control. Be sure to use the property in a single-column panel to provide the control adequate width.

   Troubleshooting

   If you get an error when creating a new data instance at runtime (either single- or multi-instance), check that your business object does not have a 'Read-only' constraint set on the ContactKey or ID property's Definition tab.

Connecting picture iParts to Facebook

You can set up the Contact Mini Profile and Contact Profile Picture iParts to prompt people to use their Facebook profile picture in iMIS, instead of uploading a picture. To use this feature, you must do the following:

- Contact your Hosting Administrator to enable Enable the Facebook feature in the web.config file
- Create a Facebook app so that your website can connect to Facebook
- Enable the iPart configuration option to Prompt for Facebook connection

When enabled, signed in users are prompted to connect to Facebook when they edit their profile picture and wherever their profile picture is displayed.

To create your Facebook application and use it in iMIS

1. Contact your Hosting Administrator to request that they do the following: Edit your web-site's web.config file, located by default in C:\Program Files\ASI\imis\net. Find the EnableFacebookApi property, and change the value to true.
2. Create your Facebook application.

- Log in to the Facebook Developers site.
- Click +Create New App.
- Enter an appropriate App Display Name and App Namespace for your organization. Only the App Display Name will be visible to users.
- Click Continue and complete your App creation.
- On the Basic info page for your App, enter the Site URL for your iMIS application.
- Take note of the App ID Facebook has created for you.

3. Contact your Hosting Administrator to request that they do the following: Add your Face-book App information to the required iMIS JavaScript.

- Edit your iMIS Facebook.js file using a text editor. By default it is located in C:\Program Files\ASI\imis\Net\AsiCommon\Scripts\SocialMedia.
- Find the appId value and update it with the ID issued to you by Facebook.

To load the Facebook API

1. Edit your website's master page. By default it is located in C:\Program Files\ASI\im-is\Net\App_Themes.
2. Add the following html within the <body></body> tags of your master page:

To enable the Facebook connection in iParts

Configure each instance of the Contact Mini Profile and Contact Profile Picture iParts used in your website to enable the options Allow picture change and removal and Prompt for Facebook connection.

Note: When the Facebook feature is disabled in the web.config file, the Facebook options do not appear in the Contact Mini Profile or Contact Profile Picture iParts.

Using the Content Block iPart

With the Content Block iPart, you can empower authorized users to create and edit content directly on a page, without using Surf-to-Edit or accessing Tools. Through iPart configuration, you can allow users to insert HTML content, add attachments, create child pages, and submit replies. At its simplest, a content block can be HTML that is read-only unless the user has permissions to see the edit command. At its most complex, a block can act as a message board with multiple posts, child posts, and replies. You can limit the number of posts to a set number, or you can leave it at the default (zero), which lets it grow indefinitely.

Note: for guidance in creating a Content Block, follow the steps outlined in Creating Custom Panels of Data, and select Content > Content Block

How groups own content

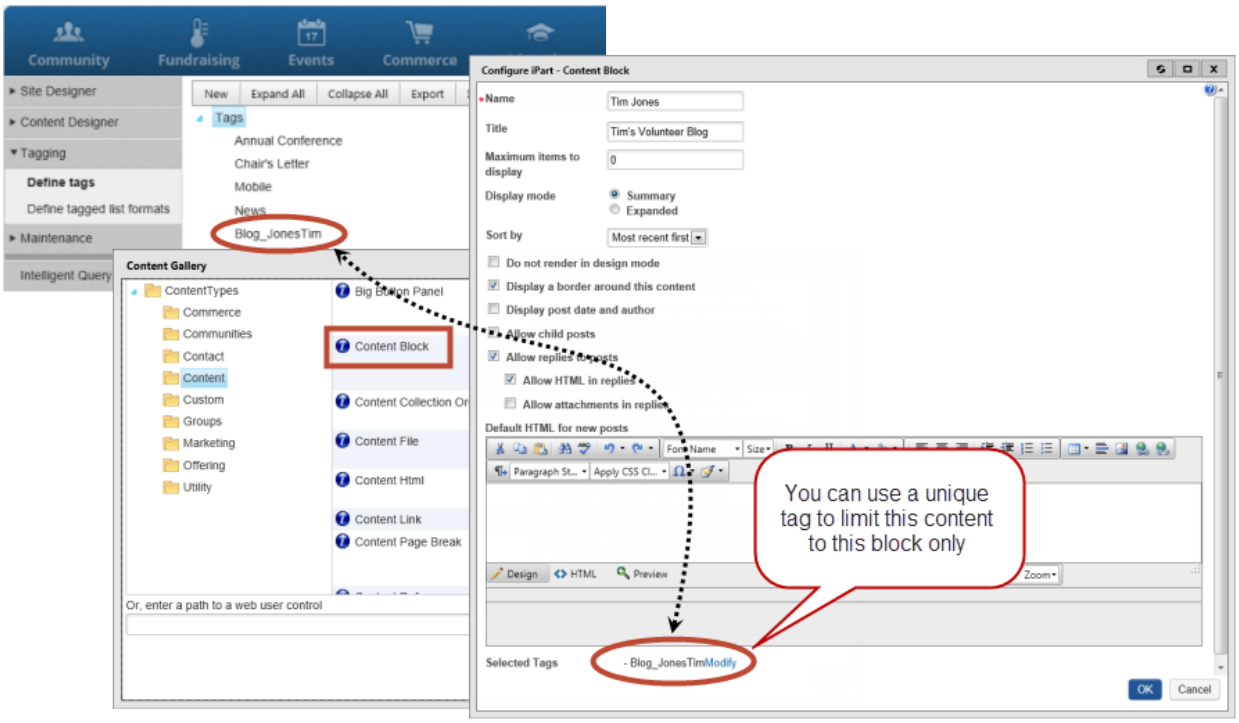
The content created with a Content Block iPart is owned by the Uniform Item associated with the page that contains the iPart. Likewise, the only content displayed is content owned by the page's Uniform Item. The Content Block currently works best with the Group landing page, where it can be used with the Uniform Item for groups. A page's Uniform Item is determined by the iUniformKey parameter passed to the page in the URL.

For example, assume that you have a content record that displays when a user clicks a search result link for a Committee, and it contains a Content Block iPart configured to display content tagged as Announcement. Now a content editor wants to add an announcement for the Planning Committee. After searching for it, he selects the result and goes to the page. The search link sends the iUniformKey for the Planning Committee to the content record through the URL. The Content Block iPart then displays any announcements

(the tag) for the Planning Committee (the Uniform Item). When he adds his new content, it is tagged as an Announcement and is owned by the Planning Committee.

Tagging to filter content

To control what content appears in a Content Block, you create tags specific to ContentBlock Items and apply those tags to specific instances of the iPart. For example, if you want to create a new blog for Tim Jones, you could create a ContentBlock tag such as blog-JonesT, place a new Content Block iPart on a content record, and configure the iPart to display the tag blog-JonesT. Now the content that Tim authors in this blog will be unique to his+ blog, if you do not apply this tag anywhere else:



Content created with anything other than a Content Block iPart will not be displayed, even if it has the same tag. For example, a content record containing HTML tagged with News will not show up in a Content Block that is also using the News tag.

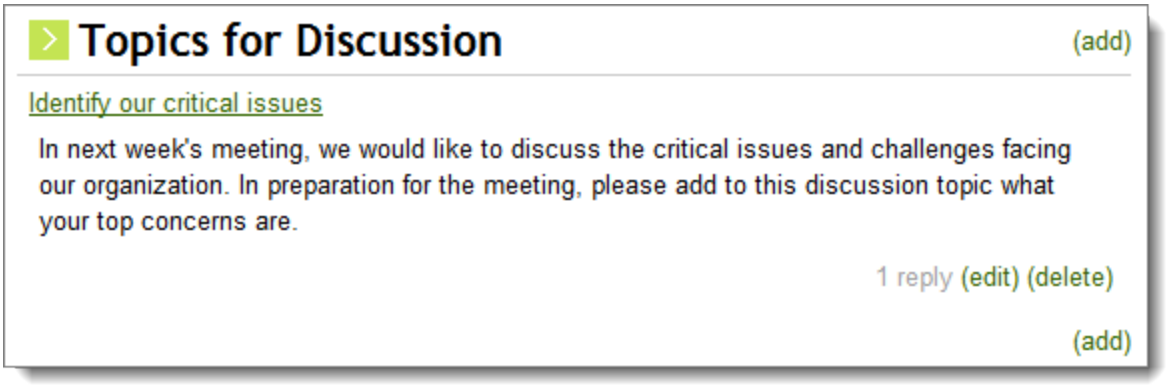
Best practice: Plan for and create the tags you want to use before configuring your Content Block iParts. Content can seem to disappear if you change the tags assigned to a content block already in use, because it no longer matches the tag set currently configured.

Creating a message board

Only users with the Content Editor permission may create posts and children, but any authenticated users can reply to a post and edit or delete their own replies. Any authenticated user may create posts and children, reply to a post and edit or delete their own replies.

To use the Content Block as a message board with multiple posts, child posts, and replies, make use of the following configuration options:

- Maximum items to display - Choose the maximum number of posts that will be displayed; 0 indicates an unlimited number of posts.
- Display mode - Expanded display mode will display replies and child posts in-line, while Summary mode only shows replies and child posts when the post is opened.
- Allow child posts - Allow Content Editors to add a child post to existing content. Allow any authenticated user to add a child post to existing content.
- Allow replies to posts - Allow authenticated users to reply to posts; you may indicate whether to allow HTML and/or attachments in the replies.



Content Block iPart set up as a discussion board

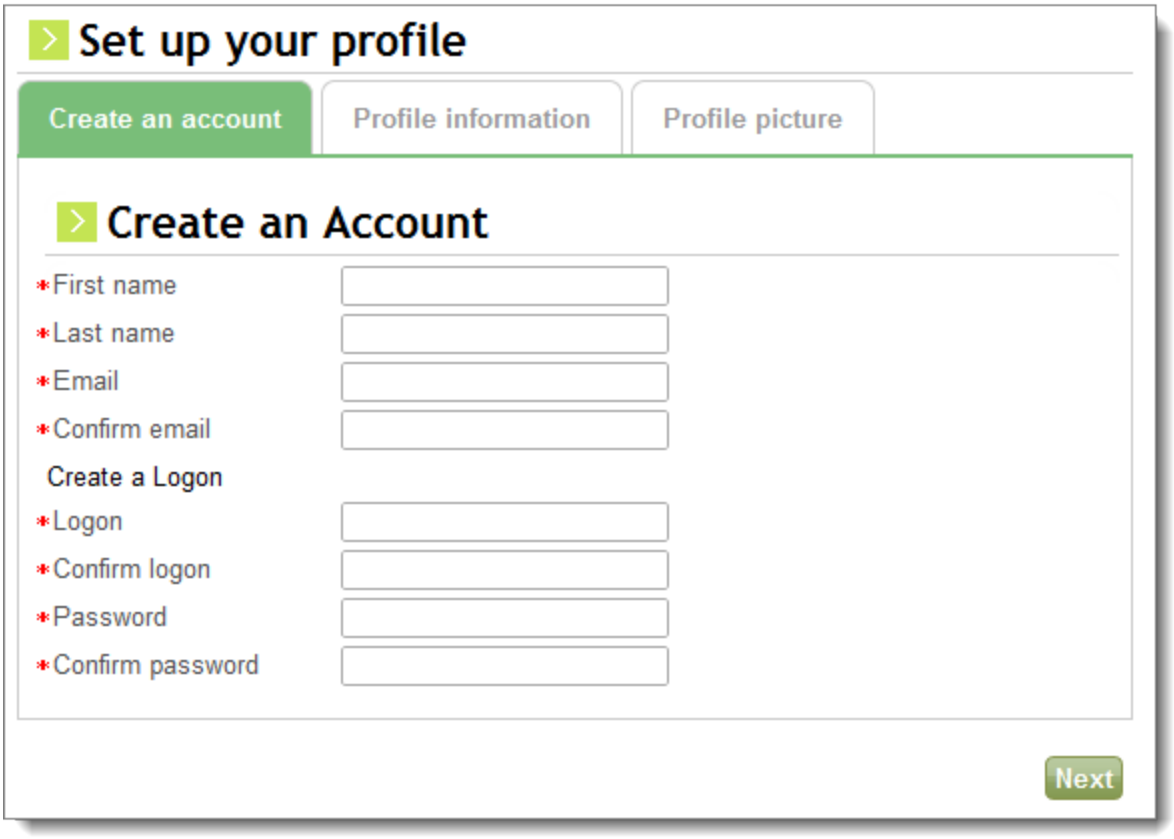
Using the Content Collection Organizer

Use the Content Collection Organizer to create a collection of pages and assign names to the tabs or headers for each page. In the simplest example, those pages are displayed, the user can access tabs in any order desired, and information is saved independently on

each page. The following screenshot shows an example with tabs across the top, configured to display different content pages.

Using the Content Collection Organizer as a Wizard

You can configure the Content Collection Organizer to function as a wizard, which will guide the user through multiple steps. When enabled, Next and Previous buttons display, allowing users to navigate between the steps, as shown below. The user can navigate to any previous tab, but forward only to the next tab in the workflow sequence. The user can also navigate with the browser's Forward and Back buttons, but the data does not commit until the user clicks Next.



Each page in the workflow is validated when the user clicks the Next button. Each iPart's page.Validate method is processed in the order the iParts appear on the page. The order of calls is:

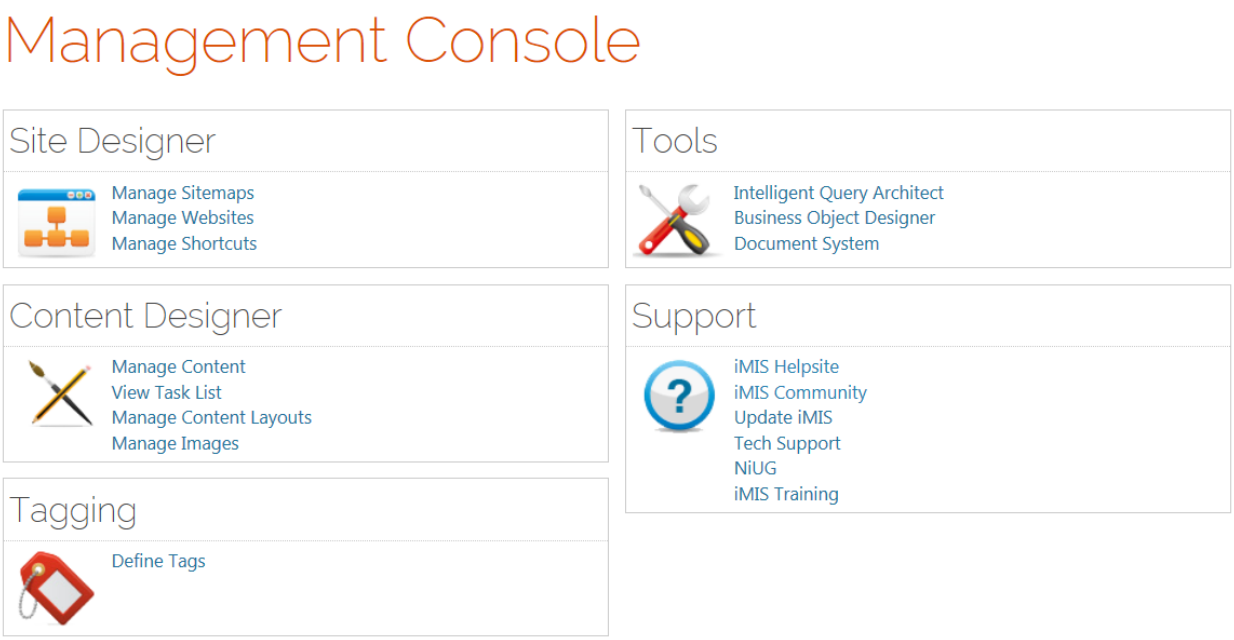
- Validation
- If Validation passes, then PreCommit
- If PreCommit passes, then Commit

If any of the calls fail (the data on a page is incomplete or incorrect), then an error message displays and the user cannot move to the next step until it is corrected.

Using the Big Button Panel iPart

With the Big Button Panel iPart, you can display a navigation panel that combines a larger, category-defining image with a list of links, as shown in the screenshot below. You

can also use this iPart to create links that make it easy for staff to perform routine tasks for contacts such as running reports, registering for events, and ordering on their behalf.



Example: Working On Behalf Of contacts and running reports using the Big Button Panel

In this example, we will set up the Big Button Panel on the account page, so that staff can select a contact from the Directory, then quickly run a report, register for an event, make a donation, or order a product for that contact.

1. Edit the account page that displays after a staff user selects a contact from your directory. In the Member site, it is the Account Page Staff content record.
2. Add the Big Button Panel (add content > ContentTypes > Content > Big Button Panel) iPart to the content record and configure it with the following settings:

- Mode: Actions
- Add an action link to run a report:
- Link Text: Print Info
- Link Target: Enter a link to a page that contains the SSRS Report iPart that displays a report such as $/Samples/ReportingServices/MemberProfileQuery_Report.

Note: The SSRS Report iPart must be configured to Hide the parameters section and to enable the option to Inspect query string for parameters. Do not enable the option to Inspect Session for parameters. For more information about SSRS reports, see Creating SSRS reports.

- URL Parameter: ContactKey=@SelectedUser
- Add an action link for event registrations:
- Link Text: Register for an event

  Note: Customize this text for the event you want to register the contact for. For example, Register for the Spring Conference.
- Link Target: Enter a link to the event page
- URL Parameter: EventKey=XYZ (replace XYZ with an event code) EventKey=XYZ (replace XYZ with an event key)
- Use On Behalf Of: Enable
- Add an action link for donations:
- Link Text: Make a donation
- Link Target: Enter a link to your donation page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable
- Add an action link for the shop:
- Link Text: Purchase a product
- Link Target: Enter a link to your Shop page
- URL Parameter: (Leave blank)
- Use On Behalf Of: Enable

3. Save and Publish the account page.

Using the Group List Editor iPart

The Group List Editor provides a flexible tool for you to display and manage lists of groups, sub-groups, relationships, and/or memberships. You can configure it to serve several different purposes.

Display an organization's roster

A common use for the Group List Editor is to display a list of contacts that belong to an organization.

For example, add the iPart to an organization's profile page, so that the iPart displays memberships for the selected organization. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the roster
- Clicking on a contact opens their profile page: Enable to link contact names directly to their profile page
- Provide option to view and edit membership details: If you want users to have easy access to both the account pages and the Group Member Detail window, also enable this option. Users can click an icon to switch between these options.
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups owned by the parent ID and their members
- Choose the group types to include: Organization
- Automatically create a group if one does not exist: Enable if you have allowed editing (this allows the creation of new rosters)
- Group owner type: Party
- Group type to auto-create: Company
- Choose the group types to include: Ensure that Company is selected

Display a contact's memberships

Another common use for the Group List Editor is to display a list of a contact's memberships in groups such as committees and chapters.

For example, add the iPart to a contact's profile page, so that the iPart displays memberships for the selected contact. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit the contact's memberships
- Clicking on a contact opens their profile page: Not applicable
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Groups that the parent ID is a member of
- Choose the group types to include: Select the group types you want to display, such as Chapters and/or Sections

Relationships in the Group List Editor

You can easily create a link between two contacts using the Group List Editor iPart. The relationships you define show up on the record of both contacts, and you can specify roles for one or both of the contacts. For example, if you edit Jean Smith's record to indicate that she knows Russell Smith, then that relationship will also appear in Russell Smith's record. Alternately, if you edit Jean's record to indicate that Russell is her child, you can also specify that her role is the parent of Russell. Then Russell's record will reflect that Jean is his parent.

There is no limit to the number of relationships you can create or the types of relationships you can create. We have provided a few relationship types out-of-the-box, but you can add additional ones if needed.

Only users with System Administrator or Staff privileges can create relationships between contacts, but any user can view a list of relationships.

Note: To use this relationship feature, you must have the RELATION license.

The following sections walk you through how to create relationship types and how to set up the Group List Editor to display relationships.

Creating relationship types groups and roles

Edit the Customer setup table for Relationship types, adding the relationships that you want to have available in the Group List Editor. For each relationship type you add, you can also define a Reciprocal relationship, which the Group List Editor automatically populates as a set (such as for Parent and Child).

To display and edit relationships in the Group List Editor, you must define a Relationship Group and Roles (relationship types) associated with that group. A sample relationship group type named Connections has been provided. You can create your own group type from Setup > Groups > Types. If you create your own group type, the only requirement is that you select the Relationship Group checkbox, so that the Group List Editor can properly display relationships.

To create Roles used in relationship groups

1. Decide which relationships you want to be able to define for users. For example, Parent-Child, Husband-Wife, etc.
2. Create Roles for each relationship type.

- From Setup > Groups > Roles, click add.
- Enter the Name of the Role and a Description of the role.
- Select the Active checkbox.
- (optional) Select a default Reciprocal Role for this role. For example, if you are creating a Parent role, you may consider selecting Child as the default Reciprocal Role, so that it is automatically selected when someone defines a Parent relationship. If the Reciprocal Role you want to add is not in the list, create it first, then add it to this role.
- Save and repeat for each relationship role you want to define.

3. Edit your relationships group (for example, the group Connections) to add the roles you have defined.

To set up the Group List Editor to display relationships

1. Add the Group List Editor iPart to a content record on which you want to display a list of a contact's relationships. For example, add it to an account page. The iPart displays a list of relationships for the currently selected contact. The selected contact is determined by either a contact ID passed to the page via a URL parameter (from the Directory, for example), the contact selected in the On Behalf Of control, or the currently signed in user.

   Note: For help adding iParts, please see Creating Custom Panels of Data.

2. Configure the iPart with the following settings:

- Allow editing: Enable, if you want System Administrators or Staff to edit relationships
- Is the page context (parent) for this iPart a group?: No
- Display a list of: Select Both of the above
- Automatically create a group if one does not exist: Enable
- Group owner type: Party Choose the group types to include: Select Relationships
- Group type to auto-create: Select a relationship group, like Connections
- Choose the group types to include: Ensure that Connections is already selected.

  Note: Only the relationship group type selected to auto-create may be edited. For this reason, if Allow editing is selected, we recommend including only the one relationship group type in this instance of the iPart.

3. Save and Publish the content record.

Using the Content HTML iPart

Using the Content HTML iPart, you can add simple content to your website, anywhere you want. In addition to the WYSIWYG functionality, you can switch to HTML mode to insert JavaScript to embed other sites, display web widgets, and use variables to create relative paths.

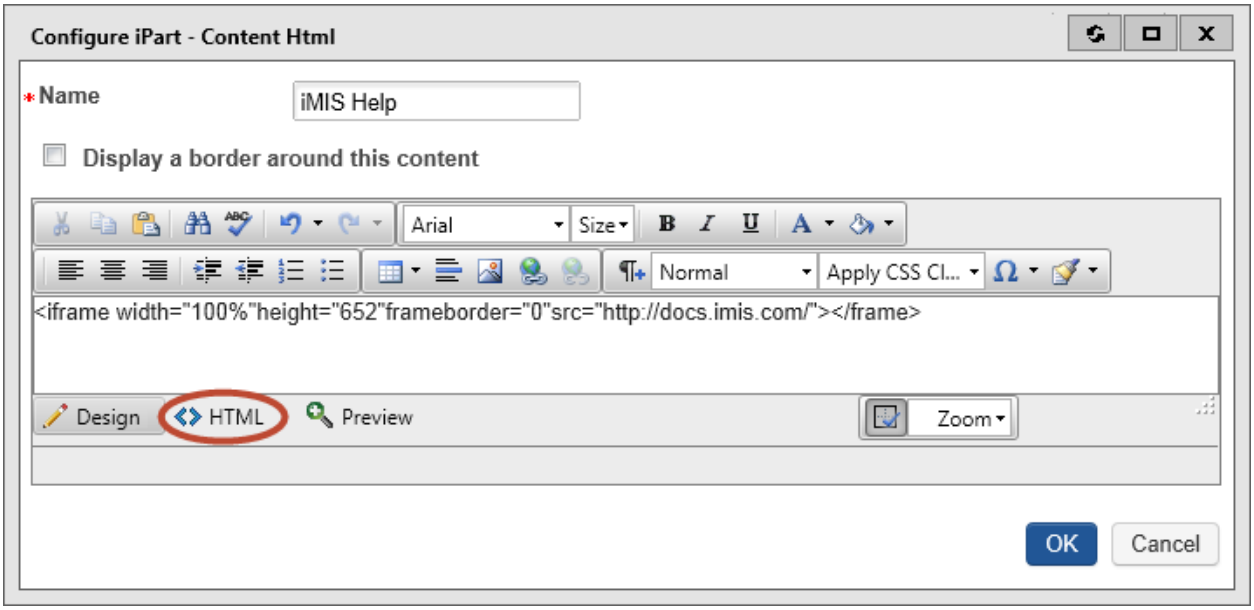
Embedding external sites

To embed any external page into an iMIS site, you can use an <iframe> like this:

1. Go to Content designer, Manage content and create a new content record.
2. Select add content and place a single Content Html iPart on it (from the ContentTypes folder).
3. Show the source by clicking the <> HTML tab and type in an iframe tag, such as this:

   <iframe width="100%" height="652" frameborder="0" src-c="http://docs.imis.com/"></iframe>

4. Go to Tools > Site designer > Manage sitemaps and create a new navigation item that points to the new content record.
5. If appropriate, restrict the navigation item's Access Settings, such as to Authenticated User Full Control.



Displaying web widgets

You can install and display JavaScript-based web widgets (plugins, gadgets) in your WCM-generated websites using the Content HTML iPart. A web widget is a small pro-

gram that your users can execute within a web page and that can provide a wide range of functionality.

For example, Google Gadgets offers thousands of free web widgets including mini applications, games, news feeds, maps, and a wide range of other types of content. Many other websites also provide free widgets that can access data from their site. For example, Twitter provides widgets that let you display Twitter updates on your website. LinkedIn provides plugins that display information such as company profiles, member profiles, and links to share on LinkedIn. You just have to search the web to see what you can find that meets your needs.

Warning: Only embed widgets from authors whom you trust. Malicious code may damage your computer or violate your privacy.

To add a JavaScript-based web widget to a webpage

Go to Content Management > Content designer > Manage content:

1. Create a new content record or edit an existing one.
2. Click add content to find and select the Content Html iPart.

   The Configure iPart window opens.
3. Click < > HTML to switch to HTML mode.
4. Copy the JavaScript embed code for the widget you want to add and paste it into the HTML area.
5. Click OK, then Save and Publish your content record.

   The widget is displayed when that content record is rendered on a webpage.

Creating relative paths using variables

The Content HTML iPart does not support the use of the ~/ (tilde slash) shortcut, often used to automatically build the correct paths when a control is rendered in different domains. However, several variables are available in this iPart that allow you to enter

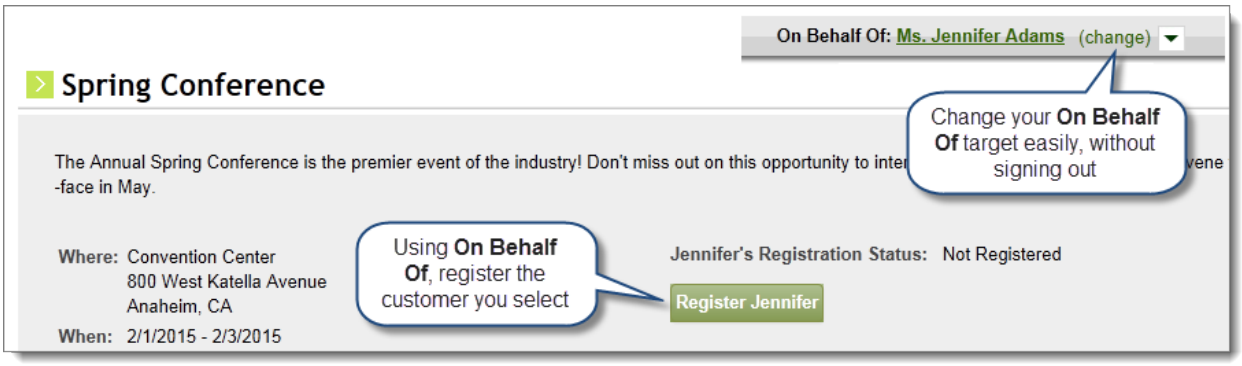
paths for links and resources that are automatically resolved to various folders in your website. The variable names are case-sensitive.

Note: Images do not render in Design mode because the variable is not transformed until the content record is published.

- [Website] – Resolves to the root of the website and contains the website name. Example: [Website]Home.aspx.
- [~] and [Root] - Both variables resolve to the root of the website. Example: [~]Home.aspx resolves to http://mydomain/Home.aspx.
- [Theme] - Resolves to the website's theme folder. Example: [Theme]images/image.png. This variable can be used to access theme resources such as images and CSS.
- [iMIS] - Resolves to the iMIS directory of the website. Example: [iMIS]ContactManagement/CreateAccount.aspx
- [Common] - Resolves to the AsiCommon directory of the website. Example: [Common]Controls/Shared/FormsAuthentication/Login.aspx

On Behalf Of: Customer service mode

Your iPart-based site is not just for self-service: On Behalf Of gives your staff a customer service mode, to complete website commerce on behalf of your customers. When requests for event registrations, product orders, and even membership renewal payments come in by phone, fax, or email, On Behalf Of lets you conduct a secure session during which you can add items to a customer's cart and complete the transaction for them, all without signing out of your own session.



Separate carts, for privacy

To avoid confusion and to protect your customers' privacy as to which items they may have added to their own carts, On Behalf Of sessions create and save carts that are completely separate from those your customers see. For added security, items yet to be purchased are saved in these carts, but not any cardholder information that may have been entered.

For example, if you added a registration to a member's cart but do not submit it, then she will not see the registration in her cart the next time she signs in; however, when you return to registering her on her behalf, you see her cart restored to the state it was in when you left it. Once you complete a purchase on her behalf, both she and you can see the order through her account page.

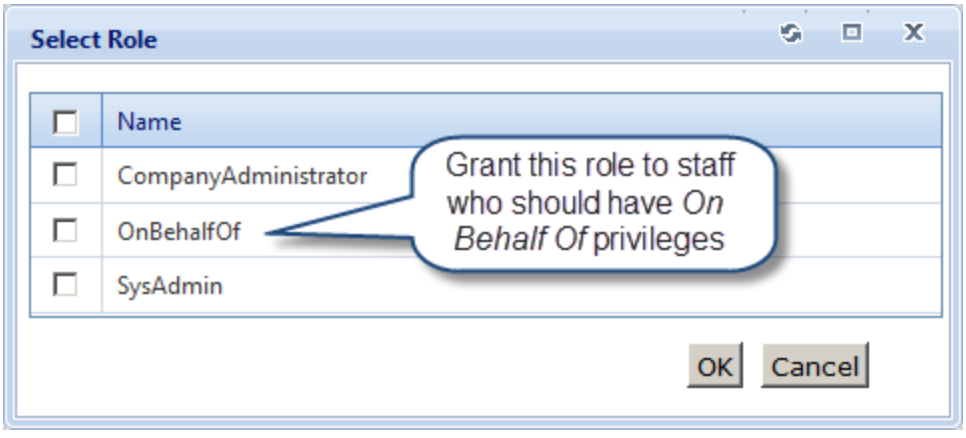
Tip: You can use the audit trails to track which logged-in user performed each action that affected an On Behalf Of transaction.

Who can act On Behalf Of?

To protect the security of contact data, users must be added to the security role SysAdmin or OnBehalfOf to perform actions on behalf of another contact (individual or organization). It is easy to give a staff member On Behalf Of privileges.

Go to System Setup > Security administration > Users:

Find and select a user, and in User Information click add role.



Changing and ending On Behalf Of

When you act on behalf of someone else, all of your commerce-related actions pertain to the target contact until you end the session in one of these ways:

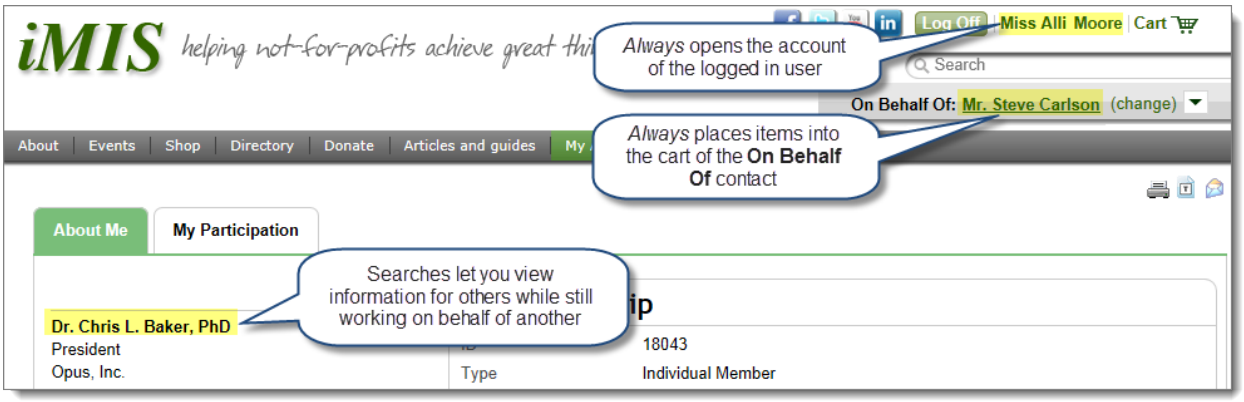
- Select a new target contact: click (change) next to the target contact.
- Clear the selected contact: click the down arrow next to the target contact and select Clear.
- Close the browser.
- Sign out of iMIS.

Whose contact information do iParts show?

Acting on behalf of another contact controls the current cart, but it does not keep you from getting to information for other contacts. An iPart determines whose cart and information to show and update based on this logic:

- If the link's URL specifies an ID (such as for search results), it shows information for that contact.
- If not, it shows information for your On Behalf Of contact, if appropriate. (For example, the Query Menu iPart runs queries regardless of the target contact.)
- Without On Behalf Of, it shows information for you, the logged-in user.
- If no one is signed in, it shows limited information.

For example, you could be working on behalf of one contact when you need to use the Directory to look up an address for another. You can drill down on information from those searches with no effect on your on-behalf-of contact: the iParts pass the queried contact's ID on the URL to show you the information you need. Only when you take actions that add items to the cart is On Behalf Of enforced.



Tip: What never changes is the contact name link in the top navigation: it always shows information for you (the logged-in user).