iMIS User & Community Summit

NiUG Conference May 18 - 20, 2021

Expand Your iMIS Pathways

Welcome

Welcome to our 2021 Virtual Program!

NiUG International is so excited to bring iMIS Users, Solution Providers/Consultants and Vendors a whole new Spring program by offering the "iMIS User & Community Summit".

Be sure to review the program to see ALL of the changes we are bringing to the iMIS Community!

Excecutive Director's Message

MICHELE MORGAN, CMP, DES
Executive Director,
NiUG International

NiUG International is so excited to bring a whole new Spring program offering, the iMIS User & Community Summit" to you, our iMIS Users, Solution Providers/ Consultants and Vendors.

At NiUG, we realize you have a choice from where you receive your iMIS engagement management system training. I know I speak not only for myself but the rest of the NiUG staff, Board of Directors, and the entire Program Committee in saying **THANK YOU, for your support**. As an independent non-profit organization, like so many of you, 2020/2021 continues to be a challenge, and as many of you know already, I have never been one to back away from a challenge! We know we need to offer something different and unique in the way of training so we sat down and completely reimagined the training programs we deliver. We must provide you a way to get more of your staff to receive the educational knowledge they need to help your organizations move forward. With ASI's (Advanced Solutions International) iMIS path changing, we also know there is a

new future for the iMIS product in which we can assist all of you to transition toward.

This year, we are providing segmented training tracks. A full day of training for Membership, Finance, Events, IT (from beginner to intermediate through advanced) those already on iMIS and those who need to plan out their move to iMIS 2020. Choose a single track, two tracks, the entire event or even a company registration for up to seven (7) individuals from your organization, so they can each cover their own segmented/departmental training. Thank you for your continued support! Please know we are here to help all iMIS Users, Solution Providers/ Consultants and Vendors through our mission, to advocate for and educate all iMIS Users.

Stay safe, stay healthy and we hope to see you all in person, soon!

SUMMIT - FULL SESSION LAYOUT

TUESDAY MORNING - MAY 18, 2021

	9:00 AM - 9:20 AM	9:30 AM - 10:30 AM	10:45 AM - 11:30 AM	11:40 AM - 12:40 PM
MEMBERSHIP	WELCOME/ OPENING	TAKING A DEEP LOOK AT YOUR ORGANIZATION'S MEMBER JOURNEY IN IMIS	UNDERSTANDING USER DEFINED DATA IN IMIS	ENGAGEMENT SCORING - PLANNING METRICS AND ROLL OUT
IT/ TECHNOLOGY	WELCOME/ OPENING	INTERMEDIATE IQA	HOW TO PLAN YOUR IMIS BUDGETING NOW AND IN THE FUTURE	PROCESS AUTOMATION USES AND OPTIONS BESIDES SCHEDULED EMAILS

WEDNESDAY MORNING - MAY 19, 2021

	9:00 AM - 9:20 AM	9:30 AM - 10:30 AM	10:45 AM - 11:30 AM	11:40 AM - 12:40 PM
EVENTS	WELCOME/ OPENING	EVENT REPORTING WITH IQA'S	BEST PRACTICES FOR VIRTUAL & HYBRID EVENTS	OPEN DISCUSSION GROUP - ALL ABOUT EVENTS
FINANCE	WELCOME/ OPENING	WHAT A BATCH! FINANCIALS AND BATCHES	UNDERSTANDING THE INS AND OUTS OF PAY CENTRAL	BASIC FINANCE REPORTING
MOVING TO IMIS 2020	WELCOME/ OPENING	WHAT'S NEW WITH IMIS 2020	GETTING READY - WHERE TO START & DEVELOPING A PLAN	PART 1 UNDERSTANDING THE DIFFERENCES (IMIS 2017 TO IMIS 2020)

THURSDAY MORNING - MAY 20, 2021

		9:30 AM - 10:30 AM	10:45 AM - 11:30 AM	11:40 AM - 12:40 PM
CLOUD ONLY	EXHIBITOR SHOWCASE	WHAT IS THE NEW IMIS REPORTING TOOL: EXAGO	SETTING UP YOUR EVENTS IN IMIS CLOUD	UNDERSTANDING AND UTILIZING DASHBOARDS
ADVANCED TECHNOLOGY	EXHIBITOR SHOWCASE	ADVANCED IQA REPORTING	ADVANCED SSRS - TIPS & TRICKS	RISE & CLIENT-SIDE DEVELOPMENT

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SUMMIT - FULL SESSION LAYOUT

12:40 - 1:30	**TUESDAY AFTERNOON - MAY 18, 2021**		

		1:30 PM - 2:30 PM	2:45 PM - 3:30 PM	3:40 PM - 4:40 PM
LUNCH	**EVENTS**	EVENTS SETUP: USING EXISTING FUNCTIONALITY TO ENHANCE YOUR REGISTRATION PROCESS	UNDERSTANDING PRICING OPTIONS AND PROMO CODES WITH IMIS EVENTS	UNDERSTANDING EVENT FINANCIALS & FINANCIAL EXCEPTIONS
LUNCH	**ADVANCED TECHNOLOGY**	EXAGO, THE NEW IMIS REPORTING TOOL	TOOLS & OPTIONS TO INTEGRATE SYSTEMS & APPLICATIONS WITH THE CLOUD	REST API IN ACTION

LUNCH

WEDNESDAY AFTERNOON - MAY 19, 2021

12:40 - 1:30		1:30 PM - 2:30 PM	2:45 PM - 3:30 PM	3:40 PM - 4:40 PM
LUNCH	**CLOUD ONLY**	MEMBERSHIP DUES PROCESSNG IN IMIS CLOUD	UNDERSTANDING IMIS COMMUNICATIONS	IMIS FINANCIALS
LUNCH	**IT/ TECHNOLOGY**	PRACTICAL APPLICATIONS FOR IQAS: DASHBOARDS	DEMOS AND TRICKS TO HELP GET BUY-IN FROM STAFF FOR AN IMIS 2020 MOVE	OPTIONS FOR MAKING YOUR SITE MORE SECURE
LUNCH	**MEMBERSHIP**	MEMBERSHIP SETUP NOW AND IN THE CLOUD	UNDERSTANDING IMIS RELATIONSHIPS	USING IQA REPORTS TO GET YOUR MEMBER DATA OUT OF IMIS

THURSDAY AFTERNOON - MAY 20, 2021

12:40 - 1:30		1:30 PM - 2:30 PM	2:45 PM - 3:30 PM	3:40 PM - 4:40 PM
LUNCH	**MOVING TO IMIS 2020**	MOVING TO IMIS CLOUD: A CASE STUDY	PRACTICAL GUIDELINES FOR MIGRATING CUSTOM PROCESSES TO CLOUD	PART 2 UNDERSTANDING THE DIFFERENCES (IMIS 2017 TO IMIS 2020)
LUNCH	**FINANCE**	THE JOURNEY OF AN IMIS TRANSACTION	UNDERSTANDING IMIS DEFERRED INCOME	FUNDRAISING FROM THE ACCOUNTING PERSPECTIVE

Schedule At-A-Glance
May 18 - 20, 2021

BY SEGMENT AREA

Schedule is designed to give attendees two half days of training on seprate dates to limit your screen time and decrease "Zoom fatigue" allowing for optimal knowledge retention.

MEMBERSHIP

DATE: TUESDAY, MAY 18, 2021
TIME: 9:30 AM - 10:30 AM
Taking a Deep Look at Your Organization's Member Journey in iMIS

DATE: TUESDAY, MAY 18, 2021
TIME: 10:45 AM - 11:30 AM
Understanding User Defined Data in iMIS (using iMIS 2020 and Cloud)

DATE: TUESDAY, MAY 18, 2021
TIME: 11:40 AM - 12:40 PM
Engagement Scoring - Planning Metrics and Roll Out

DATE: WEDNESDAY, MAY 19, 2021
TIME: 1:30 PM - 2:30 PM
Membership Setup Now and in the Cloud

DATE: WEDNESDAY, MAY 19, 2021
TIME: 2:45 PM - 3:30 PM
Understanding iMIS Relationships

DATE: WEDNESDAY, MAY 19, 2021
TIME: 3:40 PM - 4:40 PM
Using IQA Reports to Get Your Member Data Out of iMIS

EVENTS

DATE: TUESDAY, MAY 18, 2021
TIME: 1:30 PM - 2:30 PM
Events Setup: Using Existing Functionality to Enhance Your Registration Process

DATE: TUESDAY, MAY 18, 2021
TIME: 2:45 PM - 3:30 PM
Understanding Pricing Options and Promo Codes with iMIS Events

DATE: TUESDAY, MAY 18, 2021
TIME: 3:40 PM - 4:40 PM
Understanding Event Financials & Financial Exceptions

DATE: WEDNESDAY, MAY 19, 2021
TIME: 9:30 AM - 10:30 AM
Event Reporting with IQA's

DATE: WEDNESDAY, MAY 19, 2021
TIME: 10:45 AM - 11:30 AM
Best Practices for Virtual & Hybrid Events

DATE: WEDNESDAY, MAY 19, 2021
TIME: 1:40 AM - 12:40 PM
Open Discussion Group - All About Events

BY SEGMENT AREA

Schedule is designed to give attendees two half days of training on seprate dates to limit your screen time and decrease "Zoom fatigue" allowing for optimal knowledge retention.

FINANCE

DATE: TUESDAY, MAY 18, 2021
TIME: 9:30 AM - 10:30 AM
What a BATCH! Financials & Batches

DATE: TUESDAY, MAY 18, 2021
TIME: 10:45 AM - 11:30 AM
Understanding the Ins and Outs of Pay Central

DATE: TUESDAY, MAY 18, 2021
TIME: 3:40 PM - 4:40 PM
Basic Finance Reporting

DATE: THURSDAY, MAY 20, 2021
TIME: 1:30 PM - 2:30 PM
The Journey of an iMIS Transaction - Better Understanding How iMIS Financials Work

DATE: THURSDAY, MAY 20, 2021
TIME: 2:45 PM – 3:30 PM
Understanding iMIS Deferred Income

DATE: THURSDAY, MAY 20, 2021
TIME: 3:40 PM – 4:40 PM
Fundraising from the Accounting Perspective

IT/TECHNOLOGY

DATE: TUESDAY, MAY 18, 2021
TIME: 9:30 AM - 10:30 AM
Intermediate IQA

DATE: TUESDAY, MAY 18, 2021
TIME: 10:45 AM - 11:30 AM
How to Plan Your iMIS Budgeting Now and in the Future

DATE: TUESDAY, MAY 18, 2021
TIME: 11:40 AM – 12:40 PM
Process Automation Uses and Options Besides Scheduled Emails

DATE: WEDNESDAY, MAY 19, 2021
TIME: 1:30 PM - 2:30 PM
Practical Applications for IQAs: Dashboards

DATE: WEDNESDAY, MAY 19, 2021
TIME: 2:45 PM – 3:30 PM
Demo's and Tricks to Help Get Buy In from Staff for an iMIS 2020 Move

DATE: WEDNESDAY, MAY 19, 2021
TIME: 3:40 PM – 4:40 PM
Options for Making Your Site More Secure

Schedule At-A-Glance
May 18 - 20, 2021

BY SEGMENT AREA

Schedule is designed to give attendees two half days of training on seprate dates to limit your screen time and decrease "Zoom fatigue" allowing for optimal knowledge retention.

ADVANCED TECHNOLOGY

DATE: TUESDAY, MAY 18, 2021
TIME: 1:30 PM - 2:30 PM
Exago, the NEW iMIS Reporting Tool

DATE: TUESDAY, MAY 18, 2021
TIME: 2:45 PM - 3:30 PM
Tools & Options to Integrate Systems & Applications with the Cloud

DATE: TUESDAY, MAY 18, 2021
TIME: 3:40 PM - 4:40 PM
REST API in Action

DATE: THURSDAY, MAY 20, 2021
TIME: 9:30 AM - 10:30 AM
Advanced IQA Reporting

DATE: THURSDAY, MAY 20, 2021
TIME: 10:45 AM - 11:30 AM
Advanced SSRS - Tips & Tricks

DATE: THURSDAY, MAY 20, 2021
TIME: 11:40 AM - 12:40 PM
RiSE & Client-Side Development

MOVING TO iMIS 2020

DATE: WEDNESDAY, MAY 19, 2021
TIME: 9:30 AM - 10:30 AM
What's New ith iMIS 2020

DATE: WEDNESDAY, MAY 19, 2021
TIME: 10:45 AM - 11:30 AM
Getting Ready - Where to Start & Developing a Plan

DATE: WEDNESDAY, MAY 19, 2021
TIME: 11:40 AM - 12:40 PM
PART 1: Understanding the Differences (iMIS 2017 to iMIS 2020) - A Look at taking current processes in iMIS 2017 and understanding how they will function in iMIS 2020)

DATE: THURSDAY, MAY 20, 2021
TIME: 1:30 PM - 2:30 PM
Moving to iMIS Cloud: A Case Study

DATE: THURSDAY, MAY 20, 2021
TIME: 2:45 PM - 3:30 PM
Practical Guidelines for Migrating Custom Processes to Cloud

DATE: THURSDAY, MAY 20, 2021
TIME: 3:40 PM - 4:40 PM
PART 2: Understanding the Differences (iMIS 2017 to iMIS 2020) - A Look at taking current processes in iMIS 2017 and understanding how they will function in iMIS 2020)

BY SEGMENT AREA

Schedule is designed to give attendees two half days of training on seprate dates to limit your screen time and decrease "Zoom fatigue" allowing for optimal knowledge retention.

CLOUD ONLY

DATE: WEDNESDAY, MAY 19, 2021
TIME: 1:30 PM - 2:30 PM
Membership Dues Processing in iMIS Cloud

DATE: WEDNESDAY, MAY 19, 2021
TIME: 2:45 PM - 3:30 PM
Understanding iMIS Communications

DATE: WEDNESDAY, MAY 19, 2021
TIME: 3:40 PM - 4:40 PM
iMIS Financials

DATE: THURSDAY, MAY 20, 2021
TIME: 9:30 AM - 10:30 AM
What is the NEW iMIS Reporting Tool: Exago

DATE: THURSDAY, MAY 20, 2021
TIME: 10:45 AM - 11:30 AM
Setting up Your Events in iMIS Cloud

DATE: THURSDAY, MAY 20, 2021
TIME: 11:40 AM - 12:40 PM
Understanding and Utilizing Dashboards

SCHEDULE AT A GLANCE WITH SEGMENT INFO

	Membership Segment	IT/Technical Segment	Events Segment	Finance Segment	Moving to iMIS 2020 Segment	Advanced IT Segment	Cloud Only
MAY 17, 2021 - MONDAY							
NIUG PRESENTS: IMIS PRODUCTS IN ACTION - ALL DAY (WATCH FOR DETAILS)	●	●	●	●	●	●	●
MAY 18, 2021 - TUESDAY							
OPENING/WELCOME 9:00 AM - 9:20 AM	●	●	●	●	●	●	●
9:30 AM - 10:30 AM	●	●					
TRANSITION BREAK and/or EXHIBITOR SHOWCASE	●	●	●	●	●	●	●
10:45 AM - 11:30 AM	●	●					
11:40 AM - 12:40 AM	●	●					
LUNCH & EXHIBITORS	●	●	●	●	●	●	●
1:30 PM - 2:30 PM			●			●	
TRANSITION BREAK and/or EXHIBITOR SHOWCASE	●	●	●	●	●	●	●
2:45 PM - 3:30 PM			●			●	
3:40 PM - 4:40 PM			●			●	
NETWORKING EVENT 5:00 PM - 6:00 PM	●	●	●	●	●	●	●
MAY 19, 2021 - WEDNESDAY							
OPENING/WELCOME 9:00 AM - 9:20 AM	●	●	●	●	●	●	●
9:30 AM - 10:30 AM			●	●	●		
TRANSITION BREAK and/or EXHIBITOR SHOWCASE	●	●	●	●	●	●	●

Schedule is designed to give attendees two half days of training on seprate dates to limit your screen time and decrease "Zoom fatigue" allowing for optimal knowledge retention.

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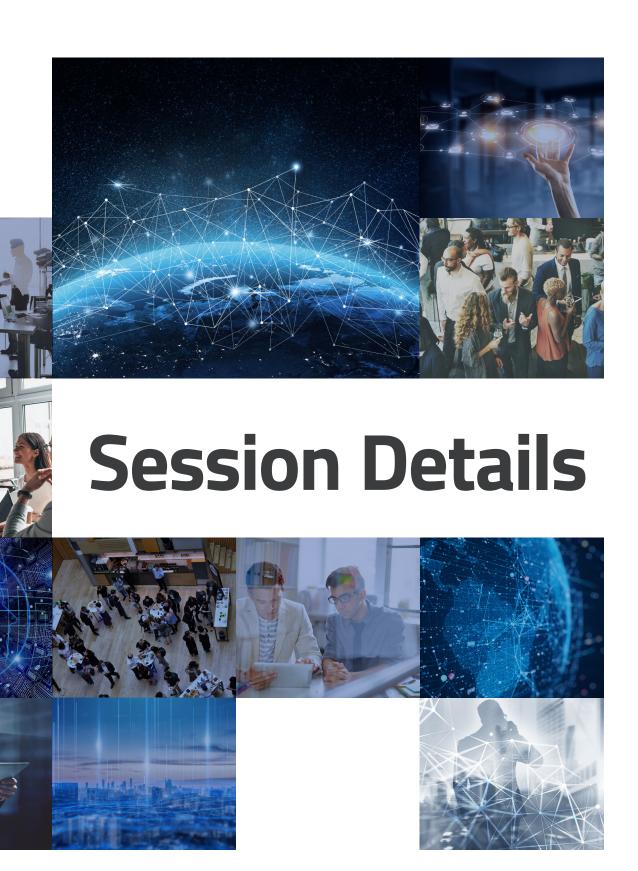
SCHEDULE AT A GLANCE WITH SEGMENT INFO

	Membership Segment	IT/Technical Segment	Events Segment	Finance Segment	Moving to iMIS 2020 Segment	Advanced IT Segment	Cloud Only
MAY 19, 2021 - WEDNESDAY CON'T							
10:45 AM - 11:30 AM			●	●	●		
11:40 AM - 12:40 PM			●	●	●		
LUNCH and/or EXHIBITORS	●	●	●	●	●	●	●
1:30 PM - 2:30 PM	●	●					●
TRANSITION BREAK and/or EXHIBITOR SHOWCASE	●	●	●	●	●	●	●
2:45 PM - 3:30 PM	●	●					●
3:40 PM - 4:40 PM	●	●					●
NETWORKING EVENT 5:00 PM - 6:00 PM	●	●	●	●	●	●	●
MAY 20, 2021 - THURSDAY							
9:30 AM - 10:30 AM						●	●
TRANSITION BREAK and/or EXHIBITOR SHOWCASE	●	●	●	●	●	●	●
10:45 AM - 11:30 AM						●	●
11:40 AM - 12:40 PM						●	●
LUNCH and/or EXHIBITORS	●	●	●	●	●	●	●
1:30 PM - 2:30 PM				●			
TRANSITION BREAK and/or EXHIBITOR SHOWCASE	●	●	●	●	●	●	●
2:45 PM - 3:30 PM				●	●		
3:40 PM - 4:40 PM				●	●		

Schedule is designed to give attendees two half days of training on seprate dates to limit your screen time and decrease "Zoom fatigue" allowing for optimal knowledge retention.

Session Details

Session Details

TUESDAY, MAY 18, 2021
Segments Covered Today:
Membership, IT/Technology, Events & Advanced Technology

TAKING A DEEP LOOK AT YOUR ORGANIZATION'S MEMBER JOURNEY IN IMIS
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	Membership
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Over time, your organization may have implemented, changed or discontinued processes, resulting in stale data and outdated procedures. Taking an overall look at your current business rules and how iMIS functionality has changed may result in less customizations, more out-of-the-box and possibly more streamlined processes. During this session we will share with you things that have significantly changed within iMIS 2017 thru iMIS 2020 within the customer/member module so you can review how your organization looks at their member and constituent processes.

INTERMEDIATE IQA
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	IT/Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

This session can help show you how to obtain multi-layered data in one IQA. We will show you joins, run-time parameters, dynamic filters, and more. You will then better understand these powerful methods and create queries that pull and report on your data with confidence.

Note: Some items covered may differ slightly from version to verision.

UNDERSTANDING USER DEFINED DATA IN IMIS (USING IMIS 2020 AND CLOUD)
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	Membership
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

We all have custom data we need to track for members and non-members, both organizations and individuals. This session will look at what is possible in both desktop and cloud. We will look at single instance and multi-instance tables and how to add, hide or rearrange fields to best meet your current (possibly ever-changing) needs.

HOW TO PLAN YOUR IMIS BUDGETING NOW AND IN THE FUTURE
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	IT/Technical
iMIS Versions Covered:	iMIS 2017 (20.2)

Much is changing with technology needs and the new iMIS path. How and what do you need to plan for in the future? There are many uncertainties and misconceptions out there but this session will help you plan for them.

Session Details

TUESDAY, MAY 18, 2021
Segments Covered Today:
Membership, IT/Technology, Events & Advanced Technology

ENGAGEMENT SCORING - PLANNING METRICS AND ROLL OUT
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	Membership
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

As more organizations are looking for ways to evaluate membership participation, engagement scoring is a great way to provide that information. In this session we will discuss how to set up engagement scoring, getting buy-in from staff on what metrics to use, and how to include external data to acheive a more accurate score.

PROCESS AUTOMATION USES AND OPTIONS BESIDES SCHEDULED EMAILS
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	IT/Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Process Automation can do much more than just schedule emails. This session will help you think of other possibilities for your organization and get you started on implementing them. Any process or task that needs to be done more than once is a possibility for automation! This will result in less manual work and more time to focus elsewhere.

EVENTS SETUP: USING EXISTING FUNCTIONALITY TO ENHANCE YOUR REGISTRATION PROCESS
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	Events
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Are you tired of registrants picking functions they Are you tired of registrants picking functions they shouldn't? Are you tired of issuing refunds to people? Functionality already exists in the Event Setup that allows us to pull everything together to create a bulletproof event registration experience! Join us, and we will show you how it can be done.

EXAGO, THE NEW IMIS REPORTING TOOL
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	Advanced Technical
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

The iMIS Report Writer (Exago) is a powerful tool that enables you to create reports and dashboards that are directly embedded in iMIS. During this session we will give you a full look at this functionality and how you can create the reports you need in a whole new way!

TUESDAY, MAY 18, 2021

Segments Covered Today:
Membership, IT/Technology, Events & Advanced Technology

UNDERSTANDING PRICING OPTIONS AND PROMO CODES WITH IMIS EVENT
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	Events
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Member/Non-Member, Pricing Groups, and those good ol' Registrant Classes are some of the pricing options available. And then there are the Promotion Codes...learn how to control the registration process further, so registrants pay the correct amount and minimize the need for you to issue those pesky refunds; how to use Promo Codes to provide discounts for the entire event or only certain functions, and how Promo Codes can be used to register your speakers and facilitators.

TOOLS & OPTIONS TO INTEGRATE SYSTEMS & APPLICATIONS WITH THE CLOUD
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	Advanced Technical
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Join us to discuss single sign-on, a user logs in with a single username and password and can navigate multiple applications without ever needing to log back in and an overview of the REST API. There are also several Product Partners who have created tools to help you, hear about some of those tools and always be sure to check with the community before you build out your own!

UNDERSTANDING EVENT FINANCIALS & FINANCIAL EXCEPTIONS
Presenter: TBA

Time:	3:40 PM - 4:40 PM
Track:	Events
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Your staff and customers enter event registrations, but sometimes you need to dig deeper than just the registration screen. This session will help you know what the financial transactions for events look like, where to find them and how to fix problems.

REST API IN ACTION
Presenter: TBA

Time:	3:40 PM - 4:40 PM
Track:	Advanced Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

We know everything is moving to REST API; we have heard about it and seen some of what it can do; however, we need more than that! This session will go into what others are doing with REST API and HOW they are getting it done! Real-life, real use and how to get moving into that direction with a better understanding of how it works so you can start DOING!

Session Details

WEDNESDAY, MAY 19, 2021

Segments Covered Today: Events, Finance, Cloud Only, Moving to iMIS 2020, IT/Technical & Membership

EVENT REPORTING WITH IQA'S
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	Events
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Some event staff want the details, but they do not want to deal with iMIS. When you master IQAs you can be their hero! We will look at all of the Business Objects used within the events module, cover those special joins to come up with the IQAs you need for a specific event, and dynamic IQAs which can be run for any event. So whether you are the "planner" needing to know what iMIS reporting can do or you're developing IQA reports yourself, you will take away what you need from this session.

WHAT A BATCH! FINANCIALS AND BATCHES
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	Finance
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Need a better understanding of iMIS financials and batch options? This session will dive into the key aspects of iMIS financials from iMIS 2017 how they differ and what is changing as we embark on the iMIS 2020 transition. You and your finance department will see any new and coming functionality, along with receiving a better understanding of key finance options existing in 2017 thru 2020.

WHAT'S NEW WITH IMIS 2020
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	Moving to iMIS 2020
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

As you get ready to map out your transition to iMIS 2020, we can help you better understand any new and changing functionality. Join us to get the information first hand from the developers of iMIS. It will also set the stage for any additional questions or things to watch for throughout the rest of the rest of the day in this "Moving to the Cloud" segment!

BEST PRACTICES FOR VIRTUAL & HYBRID EVENT
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	Events
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

How should you plan a hybrid event that will include both an in-person portion and a virtual component? A best practice is that the in-person event planning should be prioritized, followed by the hybrid event. Join us to explore more best practices that will not only help your hybrid event be the most successful, but will also reduce costs and stress!

WEDNESDAY, MAY 19, 2021

Segments Covered Today: Events, Finance, Cloud Only, Moving to iMIS 2020, IT/Technical & Membership

UNDERSTANDING THE INS AND OUTS OF PAY CENTRAL
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	Finance
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

iMIS Pay Central makes payment processing simple, secure, and affordable. Save time and money with low rates, automatic card updates, real-time reconciliation, next-day funding, and significantly reduced PCI requirements. Come to this session to see how it can help your organization.

GETTING READY - WHERE TO START & DEVELOPING A PLAN
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	Moving to iMIS 2020
iMIS Versions Covered:	iMIS 2017 (20.2)

How do you start thinking about moving to the cloud? How can you get from iMIS 2017 to iMIS Cloud? How can you work without access to everything you always had? You have questions. Come learn how to get started on your plan and manageable steps to the iMIS Cloud and what resources are available to help.

OPEN DISCUSSION GROUP - ALL ABOUT EVENTS
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	Events
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Events have taken on a whole new meaning over the last year. It has caused everyone to recreate their events and left us all with added concerns, stress, anxiety, and the need to lean on one another for help and advice. Join us for this open discussion as we help one another create innovative ideas, discuss strategies and above all else, bring our iMIS events questions to the table!

BASIC FINANCE REPORTING
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	Finance
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Are your finance people complaining iMIS won't provide the information they need? Find out how to get more out of querying and reporting financial data. Understanding where stuff lives and how to link it all together is key.

Session Details

WEDNESDAY, MAY 19, 2021

Segments Covered Today: Events, Finance, Cloud Only, Moving to iMIS 2020, IT/Technical & Membership

PART 1: UNDERSTANDING THE DIFFERENCES FROM IMIS 2017 TO IMIS 2020 - A LOOK AT TAKING CURRENT PROCESSES IN IMIS 2017 AND UNDERSTANDING HOW THEY WILL FUNCTION IN IMIS 2020
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	Moving to iMIS 2020
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

The Must Know Ins and Outs of Membership in the Cloud. You'll be turning in the Billing tab from the Customer Portfolio for a new and improved membership management. How to bill, renew and rebill your membership as well as cancel or refund when the need arises.

PRACTICAL APPLICATIONS FOR IQAS: DASHBOARDS
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	IT/Technology
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Turn your boring tabular IQAs into exciting visual Dashboards! Learn what kind of data is "dashboard-able" and how Dashboards can be used to display data and track progress in an easy-to-read format. Data at your fingertips so you can start the day with key information for reporting or making important decisions right away.

MEMBERSHIP DUES PROCESSNG IN IMIS CLOUD
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	Cloud Only
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Member types, Products, Pricing - OH My! How and where do I set up my dues and subscriptions in IMIS Cloud? We will go into chapter billing, online join, and many other areas relating to Member dues processing.

MEMBERSHIP SETUP NOW AND IN THE CLOUD
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	Membership
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

There is more to membership than just dues. How do you set up a new customer type? How do you determine which "address purpose" is used and which is the primary? How do you synchronize email/phone information to the Contact table? Where do you start with chapter setup? If you're a Trade Association, how do you determine flow-down data, set up account management, social media, and more? We will dive into where to set up iMIS to meet both your organization and membership needs.

WEDNESDAY, MAY 19, 2021

Segments Covered Today: Events, Finance, Cloud Only, Moving to iMIS 2020, IT/Technical & Membership

UNDERSTANDING IMIS COMMUNICATIONS
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	Cloud Only
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Email has taken center stage, connecting companies and people in 2020/21 like never before. This session will review email communication functionality available to all iMIS Cloud clients and the differences between that and the advanced email marketing module.

UNDERSTANDING IMIS RELATIONSHIPS
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	Membership
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

It's the six degrees of Kevin Bacon all within your database. Everybody knows somebody, but how can you keep track? Relationships within iMIS can help you maintain all sorts connections: Board members, primary contacts, political connections, mentors and more. You can even use them to link companies or chapters. Be ready to also see how to get the most out of relationships and creatively use these fields in ways they were never intended.

DEMOS AND TRICKS TO HELP GET BUY-IN FROM STAFF FOR AN IMIS 2020 MOVE
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	IT/Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

We understand it is not an easy task to move your seasoned iMIS desktop users over to the iMIS Cloud functionality; however, we can show you some tips and tricks to help win them over and get them to start! You will learn some easy techniques to give your users what they need to be productive. We will focus on Staff Site tips including: tailored dashboards, specific profiles for members, starter packs, and more. Wow your staff, and give them tips to learn to love iMIS Cloud.

IMIS FINANCIALS
Presenter: TBA

Time:	3:40 PM - 4:40 PM
Track:	Cloud Only
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Cha-Ching! iMIS Cloud is your Cash Register! As the world becomes more virtual and fast paced in their "need it now" personas, you need the ability to sell every service and product you offer on line! iMIS Cloud financials and eCommerce are your solutions!

Session Details

WEDNESDAY, MAY 19, 2021

Segments Covered Today: Events, Finance, Cloud Only, Moving to iMIS 2020, IT/Technical & Membership

OPTIONS FOR MAKING YOUR SITE MORE SECURE
Presenter: TBA

Time:	3:40 PM - 4:40 PM
Track:	IT/Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

With many staff now working from remote locations, keeping your data and RiSE websites secure is more critical than ever. This session will review options to help with PCI compliance, SOC 2 compliance, using web application firewalls to stop denial of service, SQL injections, and a host of other attacks looking for vulnerabilities in your site. Also covered will be using multifactor authentication and if you should consider using a WAF with geo-blocking capability.

USING IQA REPORTS TO GET YOUR MEMBER DATA OUT OF IMIS
Presenter: TBA

Time:	3:40 PM - 4:40 PM
Track:	Membership
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

You've collected key member and constituent data in iMIS - now you need to find and use the data to your advantage and perhaps simplify things for your contacts. By the end of this session, you will have a much better understanding of where to find standard membership data sources and how to use IQA to get useful data from iMIS.

NiUG PRESENTS:
iMIS Products In Action

JOIN US MAY 17, 2021

GET A PRE-EVENT LOOK AT SOME OF THE AMAZING IMIS PRODUCTS AVAILABLE TO UTILIZE WITH IMIS & FIND OUT IF/WHEN THEY WILL BE CLOUD FRIENDLY!

WEBINARS

DEMOS

FIRST HAND LOOK AT OUR EXHIBITOR PORTAL

PRIZES TO WIN

& MORE!

NiUG
INTERNATIONAL

THURSDAY, MAY 20, 2021

Segments Covered Today: Advanced Technical, Finance, Cloud Only & Moving to iMIS 2020

WHAT IS THE NEW IMIS REPORTING TOOL: EXAGO
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	Cloud Only
iMIS Versions Covered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

When a query is just not enough and cloud tools don't allow SQL access, you can use the New iMIS Report Writer (Exago) to get the data out that you need in the format that you prefer!

SETTING UP YOUR EVENTS IN IMIS CLOUD
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	Cloud Only
iMIS Versions Coered:	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

From a webinar to chapter meeting, to the one day, in-person annual conference, iMIS Cloud can manage it all. Add in a dash of process automation for the personal touch on your confirmations.

ADVANCED IQA REPORTING
Presenter: TBA

Time:	9:30 AM - 10:30 AM
Track:	Advanced Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Want to do more in IQA than just export data? IQA is the basis for all the dashboards on the staff site. This session will go over the more advanced features of IQA that allow you to summarize and display your data in different ways. Counting, Totals/Sub-totals, setting up for charts and more.

ADVANCED SSRS - TIPS & TRICKS
Presenter: TBA

Time:	10:45 AM - 11:30 AM
Track:	Advanced Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

You have been working on your SSRS report but can't get it to run from within the iMIS staff site. You need to build reports or certificates that can be sent as a PDF to a customer. Get some tips on using SSRS to best produce the reports and documents you need to create from iMIS data. Bring your issues and questions to find out how you might solve your reporting issues.

Session Details

THURSDAY, MAY 20, 2021

Segments Covered Today: Advanced Technical, Finance, Cloud Only & Moving to iMIS 2020

UNDERSTANDING AND UTILIZING DASHBOARDS
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	Cloud Only
iMIS Versions Covered: iMIS Cloud Enterprise (20-300)	
	iMIS Cloud Professional (20-100/200)

Your staff and organization's leadership need a quick way to access and review key metrics to stay in the know and make important decisions. Utilizing dashboards will help make all of that possible. From copy and pasting existing dashboards to make them your own, to editing existing ones - join us to see how it's done.

MOVING TO IMIS CLOUD: A CASE STUDY
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	Moving to 2020
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

See how others have moved to the iMIS Cloud. Hear first hand about their trials, tribulations and successes during their move. This will help you whether you're just starting to plan or if you are deep in the middle of your move.

RISE & CLIENT-SIDE DEVELOPMENT
Presenter: TBA

Time:	11:40 AM - 12:40 PM
Track:	Advanced Technical
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

Developing in RISE isn't all server-side C# code anymore. The "cloud" brings a lot of other options to the table. This session will cover some of the different development options that can be integrated into RISE, and how to decide which to use for the best result.

THE JOURNEY OF AN IMIS TRANSACTION - BETTER UNDERSTANDING HOW IMIS FINANCIALS WORK
Presenter: TBA

Time:	1:30 PM - 2:30 PM
Track:	Finance
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

Ask any accountant or finance person to use iMIS and their answer will not be what you want to hear! However, if they have a better understanding of how it works from start to finish, the accounts being affected within iMIS as that transaction takes its journey, it's not so bad! We will show you what happens once you enter a transaction so you may better understand why certain options in iMIS need to be set for it to all run smoothly.

THURSDAY, MAY 20, 2021

Segments Covered Today: Advanced Technical, Finance, Cloud Only & Moving to iMIS 2020

PRACTICAL GUIDELINES FOR MIGRATING CUSTOM PROCESSES TO CLOUD
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	Moving to 2020
iMIS Versions Covered:	iMIS 2017 (20.2)

The cloud is HERE! Whether you plan to get there in the next year or more, come find out how to get your customizations to be cloud-compliant. Look at your views, stored Procedures, Triggers and more to start thinking about transforming them into processes that work with iMIS Cloud.

PART 2: UNDERSTANDING THE DIFFERENCES FROM IMIS 2017 TO IMIS 2020 - A LOOK AT TAKING CURRENT PROCESSES IN IMIS 2017 AND UNDERSTANDING HOW THEY WILL FUNCTION IN IMIS 2020
Presenter: TBA

Time:	3:40 PM - 3:40 PM
Track:	Moving to iMIS 2020
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

Ditch the Advanced Accounting Console and see how iMIS Cloud allows you to do everything Event, Finance and Commerce related. From defining and marking CEU attendance to Posting batches and Order staging, all the way through to your GL Interface.

UNDERSTANDING IMIS DEFERRED INCOME
Presenter: TBA

Time:	2:45 PM - 3:30 PM
Track:	Finacial
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)
	iMIS Cloud Professional (20-100/200)

This session will provide an overview of how deferred income works, best practices for entering transactions with deferred income into iMIS and reporting options. Tracking deferred income is essential for your organization to meet financial reporting requirements. As this can impact any product or service that provides a benefit to your members over a period of time, it is necessary to understand how to enter those transactions into iMIS and how to provide information about the transactions to finance/accounting staff.

FUNDRAISING FROM THE ACCOUNTING PERSPECTIVE
Presenter: TBA

Time:	3:40 PM - 4:40 PM
Track:	Finance
iMIS Versions Covered:	iMIS 2017 (20.2)
	iMIS Cloud Enterprise (20-300)

There is so much to consider when it comes to accounting and fundraising. We will start with the basics of how a gift, pledge, or pledge payment progresses through the financial process in iMIS, and then look at corrections such as gift refunds and pledge write-offs.