



August 21-23, 2023

ANNUAL iMIS Users Conference

iMIS Users connecting with iMIS Users!



Hyatt Regency O'Hare
Rosemont, IL

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niug.org/Conference23



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event produced
by:



**NiUG Presents:
Teri Carden, ReviewMyAMS.com**



Opening Keynote

Join us in welcoming to the stage, Teri Carden, Founder of ReviewMyAMS.com, as she dives into "Top Tech Trends Associations Are Wrangling".

You will learn about the tech trends that could reshape your industry and could be the wisest investments for the future of your organization. Plus, you'll work alongside your peers to see their approaches to the trends.

SCHEDULE AT A GLANCE

MONDAY AUGUST 21, 2023

11:30 AM - 4:30 PM

Registration

1:00 PM - 4:30 PM

**Hands-On/Lecture
Classes**

**Events - Planning &
Setup in iMIS**

Hands-On Training

Location:

Follow the Money

Hands-On Training

Location:

RiSE to the Next Level

Hands-On Training

Location:

IQA Mixing Things Up

Hands-on Training

Location:

2:30 PM - 2:45 PM

Networking Break

4:30 PM - 5:30 PM

**Work it Out/Talk it
Out! One on One with
Your Instructors**

Hands-on Help

Location:

6:00 PM - 8:30 PM

Dinner On Your Own!



SCHEDULE AT A GLANCE

TUESDAY AUGUST 22, 2023

7:30 AM - 4:00 PM

Registration

9:00 AM - 9:30 AM

**General Session:
Welcome & JHMA
Recipient(s)**

9:00 AM - 10:30 AM

**Opening Keynote: Top
Tech Trends**

10:30 AM - 10:55 AM

Networking Break

11:00 AM - 12:00 PM

Breakout Sessions:

**Experience the
Difference**

Location:

**Billing/Dues - Part 1:
Set Up and How-to**

Location:

**Report Writer
Introduction**

Location:

12:00 PM - 1:00 PM

**Networking Lunch &
Discussion Round
Tables**

1:05 PM - 2:00 PM

Breakout Sessions:

**Move to iMIS EMS -
Case Studies**

Location:

**Billing/Dues - Part 2:
Recurring Dues**

Location:

**IQA's and Dynamic
Filters**

Location:

2:05 PM - 3:00 PM

Breakout Sessions:

Keep it Clean

Location:

**Onboarding and
Training for Better
Data Management**

Location:

**A Failure to
Communicate**

Location:

3:00 PM - 3:30 PM

Networking Break

3:35 PM - 4:45 PM

Breakout Sessions:

Simple, Stupid Stuff

Location:

**What Can I Connect to
iMIS?**

Location:

**Fun Technology to
Make Your Life Easier**

Location:

5:00 PM - 5:30 PM

iMIS USERS ONLY!

**Meet fellow iMIS Users
and your NiUG Board of
Directors!**

5:30 PM - 7:00 PM

**Welcome iMIS
Community
Networking Reception
brought to you by your
sponsors!**

SCHEDULE AT A GLANCE

WEDNESDAY AUGUST 23, 2023

8:00 AM - 4:00 PM

Registration

9:00 AM - 10:00 AM

Breakout Sessions:

**Setting Up EMS -
What's Involved?**

Location:

**Dashboards for
Integration Data**

Location:

**What Challenges Have
You Solved with iMIS?**

Location:

10:05 AM - 10:15 AM

**Quick Beverage/Snack
Break**

10:20 AM - 11:20 AM

Breakout Sessions:

**Form Builder - Why &
How to Use it**

Location:

**Follow the Yellow
Brick Road...**

Location:

**Process Automation
Introduction**

Location:

11:20 AM - 12:00 PM

**NiUG Round Up &
Quick Hits**

12:00 PM

**USER CONFERENCE
PORTION ENDS!**

12:15 PM - 12:55 PM

Networking Lunch

1:00 PM - 4:30 PM

**Hands-On/Lecture
Classes**

**Reports and Letters
and Graphs, OH MY!**

Hands-On Training

Location:

**Let Process
Automation Do the
Talkin'**

Hands-On Training

Location:

**Putting Your
Engagement Scoring
Plan into Action!**

Hands-On Training

Location:

**iMIS Form Builder -
Deeper Dive**

Hands-on Training

Location:

2:30 PM - 2:45 PM

Networking Break

HANDS-ON TRAINING DETAILS

MONDAY AUGUST 21, 2023

Events - Planning & Setup in iMIS

1:00 PM - 4:30 PM

Events are one of the lifelines for many non-profits! Knowing what iMIS can do and how to do it is vital to your role as an event planner or as a meetings professional. We will show you how to better understand event setup, what has changed between iMIS 2017/Staff Site & iMIS EMS, and how it may affect you as you move forward. In addition, we will show you some case studies and best practices to avoid common mistakes and increase your use of events.

LOCATION: TBA

SKILL LEVEL: Intro/Basic | Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Follow the Money!

1:00 PM - 4:30 PM

Whether you are in the finance department or the customer service department, we all need to know how an iMIS transaction is processed and what it takes to make necessary changes or corrections. We will start with an understanding of basic accounting terminology and concepts which will help you speak with your finance team. You will learn how to set up all the needed GL codes for products, events, dues, gifts and more. You will then follow the money from batches to entry and through to corrections. Then follow up with all the month-end procedures to make sure your iMIS data and accounting/ERP data is in sync. Finally, we will wrap up with all the various reports you will need to succeed. This session will cover both 2017 and EMS so you can understand the differences and appreciate the advantages of upgrading.

LOCATION: TBA

SKILL LEVEL: Intro/Basic | Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

RiSE to the Next Level

1:00 PM - 4:30 PM

Are you in charge of your organization's RiSE website or looking to move to RiSE and need to know how to use it and what it offers in functionality? Join our RiSE experts to learn the how-to's, and listen as they share trials and tribulations, best practices, and most of all, the functionality RiSE offers. From developing the basic of sites to the more complex options to build upon your existing site, from new RiSE template selections, tagging, and dynamic content items to various galleries you can utilize. No matter what version of iMIS 2017 or iMIS EMS you may be on, you will learn great takeaways attending this hands-on training class

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

IQA - Mixing Things Up

1:00 PM - 4:30 PM

You need to know how to develop and build IQA's to bring in the detail you need for various seemingly complex needs. During this hands-on class, we will show you a mix-up of the more intermediate to advanced techniques so you can do things such as: adding a custom SQL expression, utilizing an IQA as a source in another IQA, dealing with multiple business objects or sources but filtering results to exclude duplicates, using key "codes" for filters such as "@date", formatting for adding multiple values, and more. Prerequisite: Users should know how to create an IQA report before considering this hands-on training.

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

USER CONFERENCE PORTION

TUESDAY AUGUST 22, 2023

GENERAL SESSION - Opening Welcome & JHMA Recipient Award

Opening Welcome & JHMA Award

EMCEES: Teri Carden & Doug Morris

9:00 AM - 9:30 AM

Join us as we kick off the NiUG Annual User Conference with Emcees Teri Carden of ReviewMyAMS.com and Doug Morris, CSI, as they welcome you and help award this year's distinguished recipient of the John Howarth Award!

LOCATION: TBA

SKILL LEVEL: ALL Attendees

GENERAL SESSION - KEYNOTE SESSION Top Tech Trends Associations Are Wrangling

Keynote Presenter: Teri Carden, ReviewMyAMS.com

9:30 AM - 10:30 AM

It feels like the wild, wild west out there when we look at the pace of new developments in technology. Especially with the wave of remote working and learning, the number of tools that are designed to make one's life easier can be dizzying. So, which technologies do we need to prioritize, which ones are fads, and which ones do we need to put out to pasture? In this session, learn about the tech trends that could reshape your industry and could be the wisest investments for the future of your organization. Plus you'll work alongside your peers to see their approaches to the trends.

LOCATION: TBA

SKILL LEVEL: ALL Attendees

Experience the Difference

11:00 AM - 12:00 PM

This session will compare how tasks were completed in the old Desktop and how those same tasks are performed in the EMS Staff Site. Examples will include Finance, Membership, Commerce, Promotions, Events, and Fundraising.

LOCATION: TBA

SKILL LEVEL: Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Billing/Dues - Part 1: Set Up and How-To

11:00 AM - 12:00 PM

Most of us utilize and have a need for billing and dues, so what is it that you need to know before you set it up? Learn what options are available and how to use them, how to set up products, use special pricing, process billing, how to set up your online join and more. Plus, get a better understanding of the differences between the iMIS 2017 platform versus iMIS EMS.

LOCATION: TBA

SKILL LEVEL: Intro/Basic | Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Report Writer Introduction

11:00 AM - 12:00 PM

The iMIS Report Writer is a powerful tool that enables you to create reports and dashboards that are directly embedded in iMIS. The Report Writer offers an easy drag-and-drop tool that allows you to quickly pull your data into a report. This intro will show you what you need to know to get started.

LOCATION: TBA

SKILL LEVEL: Intro/Basic | Product | Technical

iMIS PLATFORMS COVERED:

iMIS EMS

USER CONFERENCE PORTION

TUESDAY AUGUST 22, 2023 (con't)

Move to iMIS EMS - Case Studies

1:05 PM - 2:00 PM

At this point many of you are preparing for your move from iMIS 2017 to iMIS EMS. There are iMIS clients that are in the beginning, middle and end of their upgrade to iMIS EMS. We will have a panel of users, along with their iMIS Solution Providers/Consultants to share their experiences, their prep ideas, tips, tricks and even the "gotchas"!

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Billing/Dues - Part 2: Recurring Dues

1:05 PM - 2:00 PM

Who doesn't want to improve their membership retention year after year? Join us for this session as we teach you how to setup and utilize recurring dues/billing, making it easier for your members to select installment payments for their membership when they join and renew. Even better, see how to set up automatic payments!

LOCATION: TBA

SKILL LEVEL: Intro/Basic | Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

IQA's and Dynamic Filters

1:05 PM - 2:00 PM

Wouldn't it be nice to be able to get results from a query in real-time, instead of wading through a ton of data each time you need a report? Dynamic filters can be used to narrow down a large data set and focus on specific information. Users can create filters based on a wide range of criteria, such as date ranges, specific values in fields, or combinations of criteria. They can also be used to create saved searches that can be accessed and reused at any time, adding data as events occur.

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Keep It Clean!

2:05 PM - 3:00 PM

Is your organization dealing with duplicates, people who move and don't update their information, or maybe just stale data is the problem? We all need to work hard to keep data clean, but there are tools/processes and even data hygiene dashboards that can help. Come check out how some are utilizing available means to keep their data clean.

LOCATION: TBA

SKILL LEVEL: Technical

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

USER CONFERENCE PORTION

TUESDAY AUGUST 22, 2023 (con't)

Onboarding and Training for Better Data Management

2:05 PM - 3:00 PM

Your data is only as good as the people and procedures that maintain it. In this session, we will discuss how focused onboarding and training, using documented best practices, procedures, and how-to manuals, along with periodic review and updating of these, can help your staff manage and maintain your data resulting in improved data quality.

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

A Failure to Communicate

2:05 PM - 3:00 PM

Have you tried but failed miserably at sending iMIS communications? If you need to send updates to registrants, but can't get the IQA to work with the communication, or when you aren't sure about the Recipient or Party because one works but the other errors out? If this has happened to you, you are going to want to sit in on this session. Learn the tips & tricks to set up a follow-up message with or without PA or PA+, while utilizing iMIS Communications and more.

LOCATION: TBA

SKILL LEVEL: All Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Simple, Stupid Stuff

3:35 PM - 4:45 PM

Get tips & tricks for simple stuff that makes a huge impact. Design new page layouts, enter key fields needed for communications, and customer notes, customize the Staff Site menu, enter mass registrations...all simple, stupid stuff most of us know exists but forget they are there.

LOCATION: TBA

SKILL LEVEL: Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

What Can I Connect to iMIS?

3:35 PM - 4:45 PM

You can share your iMIS data with other apps if you have the right connector. Find out what connects where and how you can use it to simplify work processes and reduce staff workloads. It's also smart to understand the hidden costs with each infrastructure.

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS EMS

USER CONFERENCE PORTION

TUESDAY AUGUST 22, 2023(con't)

Fun Technology to Make Your Life Easier

3:35 PM - 4:45 PM

In a world with so many options for technology to make your life easier, how do you choose? Which tools have you missed? Come to this session to see how some of your peers use popular (or maybe lesser-known) software apps for note-taking, collaboration, travel plans, and much more to make life easier. Walk away knowing the tools that could best help you to save time, money, and stress!

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

PRE-WELCOME iMIS USERS

RECEPTION - iMIS USERS UNITE!

Meet fellow iMIS Users and Your NiUG Board of Directors

5:00 PM - 5:30 PM

This pre-welcome reception event is hosted by your NiUG Board of Directors so iMIS Users have one on one time to meet other users and build connections in the iMIS Community and meet the NiUG Staff and those volunteer Board members attending. These user events are a great opportunity to build your core iMIS user support system!

NiUG Annual iMIS Community Welcome Reception - HOSTED BY your sponsors!

5:30 PM - 7:00 PM

Sponsors are a major part of the NiUG lifeline! The products and services they offer are key to the success of all iMIS customers, allowing you to enhance your use of iMIS.

Join our sponsors for an amazing opportunity to meet them and see what they have to offer your organization, all while developing more connections to build your iMIS support system!

This event will have an open bar and light appetizers - all thanks to our event sponsors!

BUILD CONNECTIONS

INCREASE KNOWLEDGE OF PRODUCTS

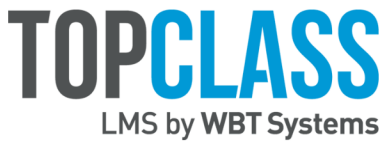
Most of all... HAVE FUN!

USER CONFERENCE PORTION TUESDAY AUGUST 22, 2023(con't)

Tuesday, August 22

5:30 pm - 7:00 pm

Welcome Reception - Sponsored by:



Data Impact Solutions LLC
powering mosaic apps

higher logic thrive



k2
and You Solutions



Lane Services LLC
not-for-profit technology solutions



More sponsors added each week!



USER CONFERENCE PORTION

WEDNESDAY AUGUST 23, 2023

Setting up EMS - What's involved?

9:00 AM - 10:00 AM

As you plan your move to iMIS EMS or once ASI does upgrades to your iMIS EMS platform, are you keeping an eye and ear on what is new in the way of setup for EMS? During this session, we will introduce you to new options you have so you know whether to turn on or uncheck that checkbox for new functionality. For instance, how do you want your batches set up: manually, automatically, or both? Start date controls in billing, event setting resources, and others.

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS EMS

Dashboards for Integration Data

9:00 AM - 10:00 AM

Sometimes you have to have data housed outside of iMIS, but that doesn't mean you can't report on it. For instance, some organizations may use HigherLogic for their chapter representatives to access event options, but your organization can still pull that data in and develop a dashboard to show your C-level key performance indicators. During this session, see how others are bringing KPIs into an iMIS dashboard to measure engagement and know goals are being met.

LOCATION: TBA

SKILL LEVEL: Technical

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

What Challenges Have You Solved with iMIS?

9:00 AM - 10:00 AM

Are you facing challenges retaining members and donors? Do you know what member offerings are truly attracting new members and keeping the existing ones renewing year after year? Do your members need the ability to pay their dues in regular installments instead of just annually to keep it affordable for their budgets and cash flow? Join us as we discuss challenges that you can solve with iMIS and how to use iMIS to gain important insights into the best single resource of data you have today at your fingertips!

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Form Builder - Why and How to Use It

10:20 AM - 11:20 AM

Form Builder helps you design and deploy beautiful and functional forms that drive value for your staff and constituents. Forms can combine information from multiple iMIS data sources while enforcing complex business rules to ensure that your data is captured correctly and completely, while leading your constituents on the journeys that you have planned for them. Come see first hand how iMIS Form Builder can help make your data collection easier and more streamlined.

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS EMS

USER CONFERENCE PORTION

WEDNESDAY AUGUST 23, 2023(con't)

Follow the Yellow Brick Road...

10:20 AM - 11:20 AM

Do you think you need to go straight to iMIS EMS Cloud? Well, you don't have to follow that path; you have choices. Learn what choices are available to you, how three different clients using iMIS have chosen a path that best suits their organization, and then make a decision that is best for your staff, members or constituents. Hear directly from your fellow users on what the drivers were for their decision, what (if any) issues they ran into, and any gotchas they may have encountered along the way.

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Process Automation Introduction

10:20 AM - 11:20 AM

Process automation helps you improve staff productivity and constituent engagement by automating manual tasks and communications. Your constituents can receive timely and relevant communications (such as a new member welcome, donation thank you, or event reminder) without burdening your staff, by using scheduled tasks and alerts that can be displayed on the Staff administrative site or your public website. Be sure to partake in this session and then sign up for the afternoon hands-on training for a deeper dive!

LOCATION: TBA

SKILL LEVEL: Intro/Basic | Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

GENERAL SESSION

ROUND-UP of the User Conference Portion of the Event AND ASK THE EXPERTS!

11:20 AM - 12:00 PM

Wish you had a body double? No need, we will round out the day with a **quick-hit, round-up** of all the cool things you may have missed in sessions you were unable to get to! Join us for this group learning session where you will **find out things you never knew about the iMIS suite of products!** You'll learn not just hot ticket items that were covered in earlier sessions, but also **tidbits and nuggets** that weren't discussed. You will also have an opportunity to **ASK THE EXPERTS** about anything iMIS!

LOCATION: TBA

SKILL LEVEL: ALL Skill Levels

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

**Be sure to stop by all
of our sponsor/exhibitor tables!
They'll be here Tuesday & Wednesday!**



HANDS-ON TRAINING DETAILS

WEDNESDAY AUGUST 23, 2023

HANDS-ON TRAINING SESSIONS

Optional - MUST BE REGISTERED FOR THESE SESSIONS IN ORDER TO ATTEND THEM!

Reports and Letters and Graphs, OH MY!

1:00 PM - 4:30 PM

iMIS Report Writer is a powerful tool that combines your data with a more aesthetically pleasing look to your report layouts. Learn how to use the new iMIS Report writer! You will be able to create all sorts of documents using iMIS data that can be put on a RiSE page, attachments to communications, pretty reports for your board/committees, and more.

LOCATION: TBA

SKILL LEVEL: Technical

iMIS PLATFORMS COVERED:

iMIS EMS

Let Process Automation Do the Talkin'

1:00 PM - 4:30 PM

This hands-on training event will show you how to utilize what is not only in out-of-the-box iMIS, but also what is available in Process Automation Plus! You can utilize Process Automation to tell your members: what's going on through automated communications, what you can do with alerts/notifications on your website, i.e. "Hey Michele, you haven't registered for the upcoming iMIS Users Conference yet, sign up today!" and include a link directly to the registration page. Also things such as wishing your members a happy birthday, a membership anniversary, or thank them for their volunteer service upon logging in. See what others have done with Process Automation to let their constituents and staff easily get the information they need. (Most ideas will require licensing for Process Automation Plus)

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

Empowering Non-Profit Efficiency: Harnessing the Power of ChatGPT and AI for Association Professionals

1:00 PM - 4:30 PM

This interactive and comprehensive training session aims to equip association professionals with the knowledge and skills necessary to leverage the potential of ChatGPT and AI technologies in their non-profit organizations. Attendees will gain a solid understanding of the capabilities, applications, and best practices for utilizing AI tools to enhance efficiency and effectiveness in their day-to-day operations. Through a combination of presentations, case studies, and practical exercises, participants will be empowered to harness the power of AI to drive innovation and optimize their workflows.

LOCATION: TBA

SKILL LEVEL: Product

iMIS PLATFORMS COVERED:

iMIS 2017 & iMIS EMS

iMIS Form Builder in Action!

1:00 PM - 4:30 PM

iMIS Form Builder was developed so your organization can capture data in the manner a simple RiSE page can't do for you. During this hands-on training class, you will work along with the instructor to better understand the ins and outs of iMIS Form Builder firsthand. We will walk you through developing a Submissions and Review Workflow in iMIS, so you can collect and process abstracts, awards, nominations, scholarships, or similar submissions by members through iMIS. In this session, we'll show you how to accept and evaluate a simple abstract for an upcoming conference and have various iMIS staff members score the submission. In addition, automated email notifications can also be configured to the applicants letting them know if their proposal has been accepted or rejected.

Attendees should have advanced knowledge of Business Objects Builder, IQAs, and some familiarity with RiSE, Form Builder, Process Automation, and Communication Templates.

LOCATION: TBA

SKILL LEVEL: Product | Technical

iMIS PLATFORMS COVERED:

iMIS EMS

produced by



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