

NiUG International

Share, Compare, Become More Aware

**2012
Discovery
Conference**
September 12-14

Schedule of Events - Discovery

Wednesday, September 12, 2012

7:45 - 9:00 am	Registration		
7:45 - 8:45 am	Breakfast & Exhibitor Showcase		
8:30 - 12:00 pm	WCM - Down to the Basics	Intro to iMIS Customer Management	iMIS AR/Cash
8:30 - 12:00 pm	How to Use & Setup the Fundraising Module		IQA - Advanced approach to make the most of this reporting tool
9:00 - 12:00 pm	SSRS - SQL Server Reporting Services (continues after breaks/lunch)		
10:00 - 10:20 am	NiUG Networking Break & Exhibitor Showcase		
Noon - 1:00 pm	Lunch & Exhibitor Showcase		
1:00 - 4:00 pm	SSRS - SQL Server Reporting Services (continues)		
1:00 - 4:30 pm	iParts - Making upgrades easier through use of this powerful tool		Intro to iMIS Events
1:00 - 4:30 pm	Crystal Reporting - Focus on financials	Fundraising - Marketing Case Studies	Business Objects for the Techies
3:00 - 3:20 pm	NiUG Networking Break & Exhibitor Showcase		
4:00 - 4:30 pm	Classes End		
4:30 - 6:00 pm	ASI - Welcome Reception		



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Schedule of Events Continued

Thursday, September 13, 2012

7:45 - 12:00 pm	Registration			
7:45 - 8:45 am	Breakfast & Exhibitor Showcase			
9:00 - 9:30 am	Opening - Kickoff & JHMA Award Presentation			
9:30 - 10:30 am	General Session - Moving Forward with iMIS			
10:30 - 11:00 am	NiUG Networking Break & Exhibitor Showcase			
11:00 - Noon	Making an Organization PCI Compliant	Going Mobile: How Associations Can Make the Move	Correcting Financial Transactions	How to achieve exceptional fundraising growth
Noon - 1:00 pm	Lunch & Exhibitor Showcase			
1:00 - 2:00 pm	What are iParts?	Data Exception Reporting - Case Studies	Orders Intro - Maintaining Inventory and Selling Products	How to use the social web to build stronger constituent relationships
2:15 - 3:15 pm	Don't Commit Social Suicide - iMIS Case Study	Membership Participation Workshop - take two!	Fundraising Marketing	How to use your website to increase constituent engagement
3:15 - 3:30 pm	NiUG Networking Break & Exhibitor Showcase			
3:30 - 5:00 pm	Learning Management and Credential Management Integrations	Obliterating Obstacles	Dues/Billing for Administrators	How to achieve exceptional membership growth
6:30 - 9:30 pm	NiUG Networking Event - Dinner at the Academy of Natural Sciences			

Schedule of Events Continued

Friday, September 14, 2012

7:45 - 11:00 am	Registration			
7:45 - 8:45 am	Breakfast & Exhibitor Showcase			
9:00 - 11:00 am	Staff Users - Web Access	Task Center - Doing more for less through automation	Stop the multiple database insanity and use iMIS!	What's new with iMIS & maximizing the value of the iMIS SUP
11:00 - 11:15 am	NiUG Networking Break & Exhibitor Showcase			
11:15 - 12:15 pm	iMIS Administration - Open discussion	Tracking Commitments thru Committees	iDashboards - Case Studies for Improving Workflow	How to make the e-commerce experience more "social" for your constituents
12:15 - 1:15 pm	Lunch & Exhibitor Showcase			
1:15 - 2:15 pm	NiUG's - Whose line is it anyway?	Events - Case Study	IQA and iMIS 15.2 - What can you do?	The Galvanized Organization: Engagement that charges, electrifies, excites...
2:20 - 3:20 pm	Understanding Where Key Data Resides in iMIS	NiUG's version of iMIS Speed Dating!	Extending your iMIS infrastructure	iXtend Multi-Vendor Integration Opportunities
3:20 - 3:30 pm	NiUG Networking Break & Exhibitor Showcase			
3:30 - 4:40 pm	NiUG Closing Session & Annual iMIS Summit			



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Sessions - NiUG Discovery Conference

Half Day	Full Day	2 hour Session	1.5 hour Session	1 hour Session	Networking Event
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● SQL Server Reporting Services

Presenter: TBA

Session Room and Time : Room - TBA - 9:00 am - 4:30 pm

This full day session will cover how to get started with SSRS, how to do custom reports and how to add your reports to iMIS. Come learn step-by-step how to create your reports, find out about reference tools and tutorials available online, and meet other iMIS users who want to master SSRS.

● WCM - Down to Basics

Presenter: Keith Stoute & James Harrison, Visual Antidote

Session Room and Time : Room - TBA - 8:30 am - 12:00 pm

Your iMIS Web Content Management module gives you control over all aspects of your iMIS software both in the office and on the web including, look, navigation, workflow and content. Come to this class to learn the basics of administering this valuable module-now part of your core iMIS software! Learn how to build a web site, create and modify navigation, create content and tag content records. This class is sure to help give you the basics to start using wCM now.

● Intro to iMIS - Customer Management

Presenter: Mark Jones, enSYNC Corporation

Session Room and Time : Room - TBA - 8:30 am - 12:00 pm

This iMIS 101 class will focus on the Customer (membership) module reviewing such things as: membership types, status, categories, company hierarchy, demographics, tab layouts, activities, committees, chapters and much more. If you are a new user to iMIS or need a refresher on the basics, this is the class for you! **CEU Credits: 3.5 Customer Profile**

● iMIS AR/Cash

Presenter: TBA

Session Room and Time : Room - TBA - 8:30 am - 12:00 pm

iMIS AR/Cash can be one of the most difficult modules to understand and master but many have done it! Why not attend this class and get a full understanding of the module to enter and edit transactions, manage batches, understand settings and standard reporting, and much more. **CEU Credits: 3.5 - AR/Cash**

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How to Use/Setup the Fundraising Module

Presenter: Bob Lane, PhD, Lane Services

Session Room and Time : Room - TBA - 8:30 am - 12:00 pm

Getting started with the Fundraising Module can be overwhelming. During this session, you will get the training you need to get started by going through the module's configuration options and gain best practice recommendations.

CEU Credits: 3.5 Fundraising

IQA - an advanced approach to make the most of this reporting tool

Presenter: TBA

Session Room and Time : Room - TBA - 8:30 am - 12:00 pm

This course covers more complex queries and advanced functions, and how to organize your folders and queries. Students must be able to create queries in IQA using basic options or have attended Intro to IQA.

iPARTS

Presenter: Keith Stoute & James Harrison, Visual Antidote

Session Room and Time : Room - TBA - 1:00 pm - 4:30 pm

You can do so much more with your website with the use of iPARTS. Come learn what is an iPart? How do you find these iParts? How do you deploy iParts to your iMIS wCM website? What makes an iPart different than the iMIS Public View modules? With iPARTS from ASI and those being developed by others, see how you can apply these to your existing site to save time and money during future upgrades!

Intro to iMIS - Events

Presenter: Presenter: Mark Jones, enSYNC Corporation

Session Room and Time : Room - TBA - 1:00 pm - 4:30 pm

Is event management the bread and butter of your organization? Using the iMIS's events module properly can be key in maximizing efficiencies and running a successful event. Learn how the events module works, how to use it to gather important information and how to get the data out when you need it! **CEU Credits: 3.5 Events**



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● **Crystal Reporting - Focus on Financials**

Presenter: TBA

Session Room and Time : Room - TBA - 1:00 pm - 4:30 pm

Has your CEO ever asked you to show a report on certain financial transactions or for a detailed summary on the income of your last event? Have you ever had to prepare for an audit? Having a better understanding of where financial data resides and how to grab the detailed information you need is essential. Join this class to learn how to use Crystal Reports software to find out all of this and much more!

● **Fundraising Case Studies - Marketing**

Presenter: Bob Lane, PhD, Lane Services

Session Room and Time : Room - TBA - 1:00 pm - 4:30 pm

Fundraising isn't easy, but knowing how to get the right message to the right audience can make a significant difference in effort. The Guide Dog Foundation for the Blind has expertly crafted integrated campaigns, invitations and call to actions using their email marketing system, Informz. Hear first hand from the organization on their efforts to build on end of year donations and how their integrated marketing plan and tools have helped to raise funds.

● **Business Objects for Techies**

Presenter: TBA

Session Room and Time : Room - TBA - 1:00 pm - 4:30 pm

This course covers the basics and best practices of using the iMIS 15 Business Object Designer. Advanced IQA skills are required prior to taking this class. The session is designed for the advanced/technical user who has previously worked with and understands the role of the Business Object Designer.

Thursday, September 13, 2012



● **Opening Kickoff**

Presenter: Steve Wooton, NiUG President

Session Room and Time: Room - TBA - 9:00 am - 9:30 am

Kick off the start of this year's conference as President of NiUG, Steve Wooton talks about what's new with NiUG and what great things are to come! We'll also award this year's John Howarth Memorial Award and hear an update from Advanced Solutions' Product Development staff, Jeff Spring and Brian Lindsey.

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General Session - Moving Forward with iMIS

Presenters: Brian Lindsey & Jeff Spring, Advanced Solutions International

Session Room and Time : Room TBD - 9:30 am - 10:30 am

Join key individuals of Advanced Solutions International who are in the front lines of product development as they show us and discuss with us the vision of where iMIS is going and what ASI is doing to achieve their goals to bring all of you a quality product.

NiUG Networking Break & Exhibitor Showcase

Room and Time : Room TBD - 10:30 am - 11:00 am

Making an Organization PCI Compliant

Presenter: Steve Wooton, Talley Management

Session Room and Time : Room TBD - 11:00 am - Noon

If your organization accepts credit card payment for products or services, you need to know how to secure the information in iMIS. In this session, we will discuss what PCI compliance tools are built into iMIS and how you can maximize your iMIS settings to meet compliance guidelines, what is involved in making the organization compliant as a whole; from your network, hosting environment, internal documents and more.

Going Mobile: How Associations Can Make the Move

Presenters: Janan Compitello, NimbleUser

Session Room and Time : Room TBD - 11:00 am - Noon

According to a recent Nielsen report on the current mobile media landscape in the US, the number of smartphone subscribers using the mobile Internet has grown 45 percent since 2010. 84% of smartphone users are using their phone to surf the Web. Associations need to think how they can remain relevant and accessible through this communication channel. In this session NimbleUser will explore: -An overview of today's mobile landscape, the various mobile experiences and how mobile relates to your association's website. -Mobile Apps for Conferences: What does it offer, how does it work and how would an association manage the app. -Tips on writing for mobile or transitioning website content to mobile.

Correcting Financial Transactions

Presenters: TDB

Session Room and Time : Room TBD - 11:00 am - Noon

Do you dread getting a call from staff saying they have a problem with an A/R transaction, batch or with processing a payment? Learn how to correct the most commonly seen financial transaction entry errors and get pointers for troubleshooting transaction issues in iMIS. **CEU Credits: 1 A/R Cash**



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● **How to achieve exceptional fundraising growth**

Presenters: Robin Fisk, Advanced Solutions International

Session Room and Time : Room TBD - 11:00 am - Noon

Join a discussion around best practices in implementing an integrated multi-channel fundraising campaign. Learn how you should be leveraging snail mail, email, your web site, mobile, and social media to reach more people, build stronger relationships, and improve fundraising results. Learn about the timing of each, how to message on each, how to segment for each and what you should be measuring so you can learn, adjust and even drive greater results.

● **Lunch & Learn and Exhibitor Showcase**

Session Room and Time : Room TBD - 12:00 pm - 1:00 pm

● **What are iParts?**

Presenter: TBD

Session Room and Time : Room TBD - 1:00 pm - 2:00 pm

Interested in expanding your tools for integrating iMIS with your organization's website? Join us for this overview to learn what iParts are, what they do, how they can be used, and how they work with iMIS.

● **Data Exception Reporting - Case Studies**

Presenters Panel: Keith Williams, Irrigation Association

Session Room and Time : Room TBD - 1:00 pm - 2:00 pm

Have you ever wondered how other iMIS users have been developing data exception reports? Join this panel of presenters as they discuss different ways they have found to check on data entry correctness based on their organization business rules and pull records that don't conform to be corrected. We will also show you what various tool are available to do this and discuss what some of the pros/cons of each may be.

● **Orders Intro - Maintaining Inventory and Selling Products**

Presenter: TBD

Session Room and Time : Room TBD - 1:00 pm - 2:00 pm

If you are selling products or are thinking about selling products this is a must attend session to show you the Orders module so you have a better understanding of how it works in the way of maintaining inventory, placing orders, refunding orders and much more.

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● **How to use the social web to build stronger constituent relationships**

Presenter: Robin Fisk, Advanced Solutions International

Session Room and Time : Room TBD - 1:00 pm - 2:00 pm

Are you making the most of social media sites such as LinkedIn, Twitter, Facebook and Youtube to broaden the reach of your organization? The ever-changing social networking landscape can make it difficult to know how best to use the tremendous potential of these sites to your advantage. We'll show you how to further strengthen the relationship with your constituents by offering the latest social media tools on your website. With these tools, your constituents will be able to recommend your products, events, fundraising campaigns and other content to their social media sites—thereby increasing your visibility and taking your organization viral!

● **Don't Commit Social Suicide - iMIS Case Study**

Presenter: Melissa Mack, Intuitive Business Concepts and Social Toaster

Session Room and Time : Room TBD - 2:15 pm - 3:15 pm

Do you ever get tired of all the Tweets, Facebook posts and other areas of social networking you are in charge of for the organization? Find out how one customer simplified life by tying all of their social media together thru iMIS.

● **Membership Participation Workshop - take two!**

Presenter: Christine Smith and Brandie Fennell, Get Efficient

Session Room and Time : Room TBD - 2:15 pm - 3:15 pm

If you attended the Orlando conference then don't miss this session as Brandi and Christine update us on what came out of the membership participation session in Orlando and give us ideas and ways to move your organization in the right direction!

● **Emails and Receipts - Sending members information thru iMIS**

Presenter: TBD

Session Room and Time : Room TBD - 2:15 pm - 3:15 pm

There are so many ways to send emails, letters, receipts and other forms of communication thru iMIS that it should make it a simple task. Come see how organizations are communicating and sending these items to their members thru iMIS saving time and meeting the instant needs of their members.



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● How to use your website to increase constituent engagement

Presenter: TBD

Session Room and Time : Room TBD - 2:15 pm - 3:15 pm

How "smart" is your website? Can it greet your constituents with targeted content based on their particular needs/interests? Can it suggest products/services based on past transactional history? Does it empower them to manage their own data at their convenience? Delivering a personalized web experience is key to keeping your constituents actively engaged and reminding them of the unique value only your organization can offer them. Find out the exciting new ways you can create websites with convenient self-service options and custom web pages based on constituent data—without costly programming! We'll show you how your database and website can work together to meet constituent needs while—at the same time—increasing staff productivity, eliminating manual processes, and reducing overhead expenses.

● NiUG Networking Break & Exhibitor Showcase

Room and Time : Room TBD - 3:15 pm - 3:30 pm

● Learning Management and Credential Management Integrations

Presenter: Derrick Strom, InterDyn BMI

Session Room and Time: Room TBD - 3:30 pm - 5:00 pm

This session will focus on the benefits of integrations with Learning Management Systems and Credential Management systems with iMIS. How do you select and choose a partner or system with whom to integrate? What do you need to achieve a successful integration? Program focus, as well as, technical focus will be covered in this presentation. Come find out what other organizations are doing to generate non-dues revenue, extend benefits and reach to members and non-members alike.

● Obliterating Obstacles

Presenter: TBD

Session Room and Time: Room TBD - 3:30 pm - 5:00 pm

While blazing new trails can be fun, you will often find that your iMIS challenges and opportunities have already been faced by other organizations. Join this session to learn about iMIS issues that have been encountered by others and how they conquered them to build successful iMIS business processes.

● Dues/Billing for Administrators

Presenter: TBD

Session Room and Time: Room TBD - 3:30 pm - 5:00 pm

Perfect for new staff who need to get up to speed quickly or as a refresher for those who might have missed new features in the product along the way. This Dues/Billing management session includes; configuration of the module, use of optional modules such as dues and subscription products, dues table maintenance, running reports and more.

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How to achieve exceptional membership growth

Presenter: Nathan Slovin, Advanced Solutions International & Tony Russell, MGI

Session Room and Time : Room TBD - 3:30 pm - 5:00 pm

Tony Russell, MGI's Senior Vice President, will present the key findings from this year's survey of nearly 700 associations regarding the strategies and tactics they use to recruit, engage and retain their members—and he'll reveal which of these approaches worked best.

NiUG Networking Event - Academy of Natural Sciences

Location: 1900 Benjamin Franklin Parkway, Philadelphia

Time: 6:30 pm - 9:30 pm (Meet in Lobby by 6:15 to walk over to the venue)

Join us at the networking event not to be missed! This year's networking dinner event will be held at the Academy of Natural Sciences of Drexel University. It is America's oldest natural history museum and a world leader in biodiversity and environmental research. This event includes hors d'oeuvres, dinner, drinks and dessert and the ability to view a piece of Philadelphia history and research. The event tickets value is over \$100 per person and NiUG charges a minimal fee to its attendees. Don't miss out, sign up today... you won't be disappointed!



Friday, September 14, 2012

Staff Users - Web Access

Presenter: TBD

Session Room and Time : Room TBD - 9:00 am - 11:00 am

Confused about what a staff member can accomplish online through the web access to iMIS vs. the desktop application? Wonder no more! This session will walk you through how you can leverage the browser access point for not only iMIS functionality but much much more.

Task Center - Doing more for less through automation.

Presenter: Tricia Fastje, (C) Systems, LLC & John Nicoletta, New York State Bar Association

Session Room and Time : Room TBD - 9:00 am - 11:00 am

All aboard! Join us on the automation train where we will take you for a ride learning about "real world" association requests and how TaskCentre was utilized to achieve success.



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● Stop the multiple database insanity and use iMIS!

Presenter: TBD

Session Room and Time : Room TBD - 9:00 am - 11:00 am

Let's go back to some of the basics of iMIS to review and show how activities and custom windows have made it easy for others to finally get rid of those various external databases and start housing that important data in iMIS to save staff time and get more of a ROI from iMIS! **CEU Credits: 1 Customer Portfolio**

● What's new with iMIS & maximizing the value of the iMIS SUP

Presenter: Brian Lindsey & Kathy Garliss, Advanced Solutions International

Session Room and Time : Room TBD - 9:00 am - 11:00 am

Learn about the exciting new features in iMIS including a new mobile-ready website, improved self-service capabilities, expanded value-added taxation (VAT) support, and integration with PayPal. We'll also highlight enhancements to the Software Update Plan (SUP) and what they mean to you.

● NiUG Networking Break & Exhibitor Showcase

Room and Time : Room TBD - 11:00 am - 11:15 am

● iMIS Administration - Open discussion

Presenter: TBD

Session Room and Time : Room TBD - 11:15 am - 12:15 pm

Join us for this hour to openly discuss iMIS Database Administration tasks, such as, user maintenance, security, data integrity, purging marked for deletion records, and anything else that comes to mind! Come share, compare and become more aware of how to save time and ensure you stay on top of important database administration tasks!

● Tracking Commitments thru Committees

Presenter: TBD

Session Room and Time : Room TBD - 11:15 am - 12:15 pm

Do you have committees and groups you could or have been tracking thru the iMIS Committees module? This session is designed to show you the best practices of using this module and to help you to better understand the committees setup and how it can be used in your organization. This is a great session for iMIS "newbies" and those needing a refresher! **CEU Credits: 1 Customer Portfolio**

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● iDashboards - Case Studies for Improving Workflow

Presenter: TBD

Session Room and Time : Room TBD - 11:15 am - 12:15 pm

Having information on the desktop and easily accessible to executives and staff members is key to staying on top of how the organization is doing financially, numbers for membership, fundraising and many other key "must know" statistics. During this session, see how at least one organization is doing just that!

● How to make the e-commerce experience more "social" for your constituents

Presenter: Jeff Spring & Joyoti Hull-Jukovic, Advanced Solutions International

Session Room and Time : Room TBD - 11:15 am - 12:15 pm

Which carries more weight: the recommendation of a respected colleague or an advertisement? That's right – a peer's suggestion will win out every time. Now you can leverage this behavior by offering social media tools on your website that enable your constituents to share what they think about your upcoming events, a resource they just bought, a program they're supporting, and more on Facebook, Twitter and other sites. With tools that will show them who else has registered for your conference or just purchased a product, they can learn from and share the success of others— and you can watch e-commerce revenue soar through viral marketing and up-sell opportunities.

● NiUG Networking Lunch & Exhibitor Showcase

Room and Time : Room TBD - 12:15 pm - 1:15 pm

● NiUG's - Whose line is it anyway?

Presenter: TBD

Session Room and Time : Room TBD - 1:15 pm - 2:15 pm

Join this NiUG version of "Who's Line is it Anyway?" as we have an open discussion about everything and anything iMIS related. You may start the conversation or be the one who answers it but as with the TV show, many will be involved and your iMIS dilemma may take an unknown twist before a resolution comes back to you!

● iMIS Events - Case Study

Presenter: TBD

Session Room and Time : Room TBD - 1:15 pm - 2:15 pm

See first hand how an organization is making the most out of the iMIS events module to organize their events.



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● **IQA and iMIS 15.2 - What can you do?**

Presenter: TBD

Session Room and Time : Room TBD - 1:15 pm - 2:15 pm

Are you looking to apply queries to modify and build new product screens? Learn how in iMIS 15.2 or greater you can take advantage of these new features within your organization.

● **The Galvanized Organization: Engagement that charges, electrifies, excites...**

Presenter: Nathan Slovin, Advanced Solutions International

Session Room and Time : Room TBD - 1:15 pm - 2:15 pm

Engagement is the word of the moment, but a galvanized organization is more than engagement; a galvanized organization not only grows your numbers, but requires the creation of content that brings your members back for more, helps achieve your strategic goals, raises organizational awareness, improves perception and powerfully connects constituents from every corner of your organization. Join us so you can see first hand how you can become a galvanized organization!

● **Understanding Where Key Data Resides in iMIS**

Presenter: TBD

Session Room and Time : Room TBD - 2:20 pm - 3:20 pm

How can you report on your data if you don't know where to go to find it? This session will give you key data references so even the non-technical user can report on what they need from iMIS. **CEU Credits: 1 Customer Portfolio**

● **NiUG's version of iMIS Speed Dating!**

Presenter: TBD

Session Room and Time : Room TBD - 2:20 pm - 3:20 pm

Networking at its best! This session will have a "speed dating" spin on it as we have a topic at each table... don't like it or hear a buzzer? Move onto the next one... you won't know the topic till you sit down and even if it may not pertain to you it might just peak your interest enough to want more! After the conference is over the topics and discussions will continue on the member community for further discussion and for you to get the answers and details you need to decide is this iMIS module or solution of a module what you were looking for!

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● **Extending your iMIS infrastructure**

Presenter: Matt Fox, Association Technology Solutions

Session Room and Time : Room TBD - 2:20 pm - 3:20 pm

How can you leverage the technology in and around iMIS to create new solutions? Come join us for this interactive discussion of business support systems built around iMIS with demonstrations of systems built using SSRS, SharePoint and iMIS!

● **iXtend Multi-Vendor Integration Opportunities**

Presenter: Neil Kleinberg, Advanced Solutions International

Session Room and Time : Room TBD - 2:20 pm - 3:20 pm

Join us as we show you the power behind this module and what iMIS users are doing within their organizations to save time, automate processes, find database entry errors and so much more!

● **NiUG Networking Break & Exhibitor Showcase**

Session Room and Time : Room TBD - 3:20 pm - 3:40 pm

● **NiUG Annual iMIS Summit**

Presenter: NiUG Product Advisory Committee

Session Room and Time : Room TBD - 3:40 pm - 4:40 pm

This year we will again close out the conference with the iMIS Summit to discuss the current items on IdeaScale in which our members have submitted for enhancements and fixes for iMIS moving forward. Members will have the opportunity to list iMIS fixes and enhancements they feel are important in the future releases of iMIS and others can vote on the importance of your suggestions so they can make it to the top ten list of most important items users feel should be incorporated into iMIS in future releases. During this session find out what the top 10 most important items were last year and what was added to iMIS or fixed and then users will vote and/or debate why your issue should be there if it isn't in the top 10. Afterwards, stick around for the conference grand prize giveaway!