



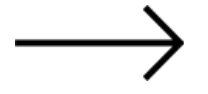
CAUSEIS PRESENTS

Digital Academy for Associations

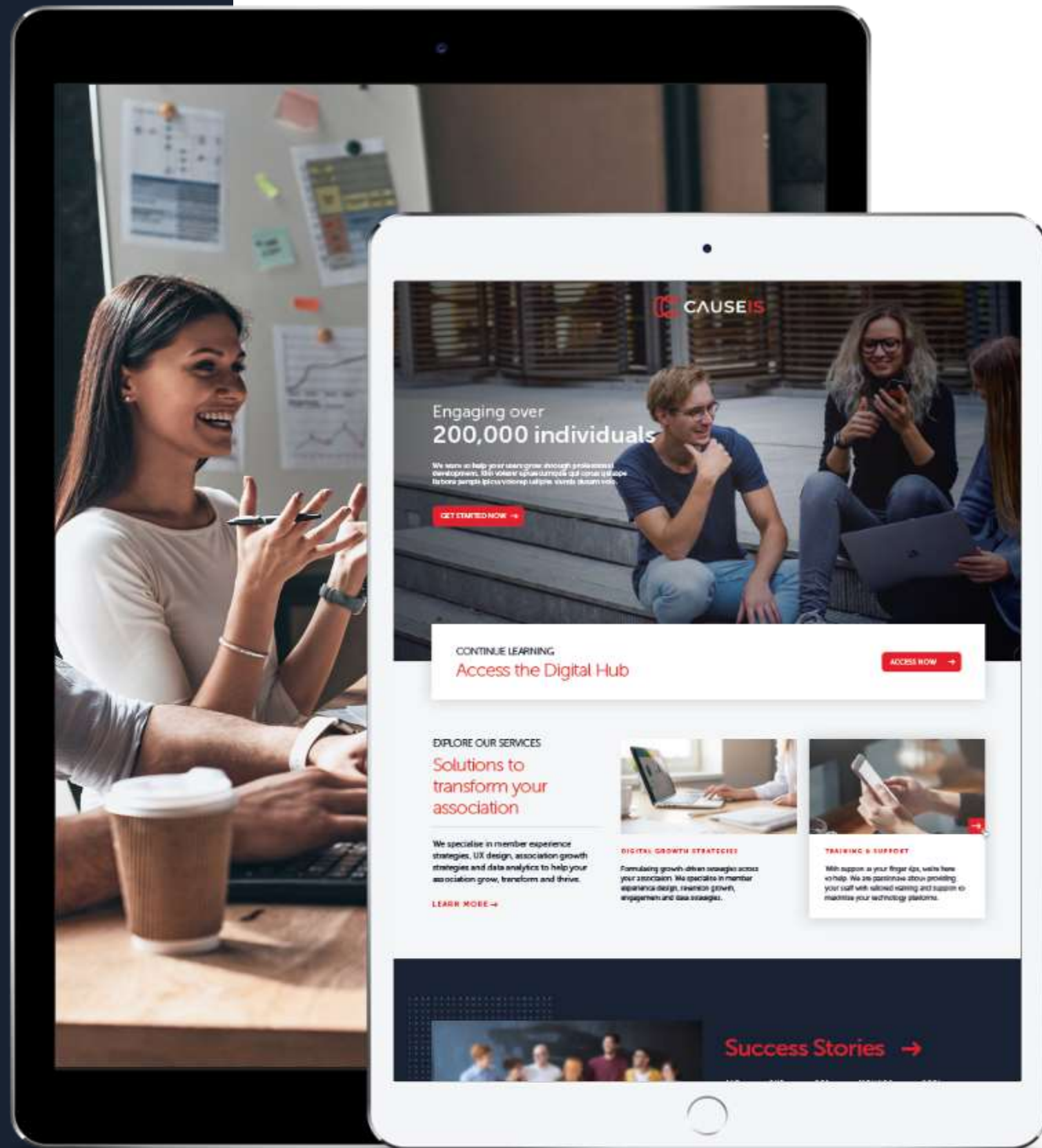
→ Course: iMIS Reporting – Focusing
on Events



Digital Academy



Welcome to the Digital Academy



- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Dedicated Engage iMIS courses to maximise your knowledge of iMIS.
- Consider new culture, innovation and ideas
- Tools and frameworks to help you



About Causeis

Causeis exists to support associations.

Causeis is the complete Digital Partner for your association, and we bring a shared vision for your success.

With unmatched experience in association strategy and technology to draw on, every aspect of our service is centered around the member experience.

Partnered with global best-in-class technology, we ensure you have all bases covered with Causeis.

Recently named by ASI as the Global iMIS Partner of the Year.



Supported by AuSAE

The home for association professionals.

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Presenters & Facilitators



Conrad Henley-Calvert, CiP, MACS
CT
Service Delivery Manager
Causeis



Yolande Smith
Digital Marketing Specialist
Causeis



Maximise your Workshop Experience



Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

Presentation Slides

Presentation slides and recording will be distributed on course completion.

Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

Tuesday,
19th July

Learning Objectives

- Learn how to create event reports in iMIS
- Gain greater understanding into the source of event data including invoicing of registrations
- Improve your reporting with parameters, prompts and displays
- Immediately gain skills in iMIS to implement new event reports

Tuesday,
19th July

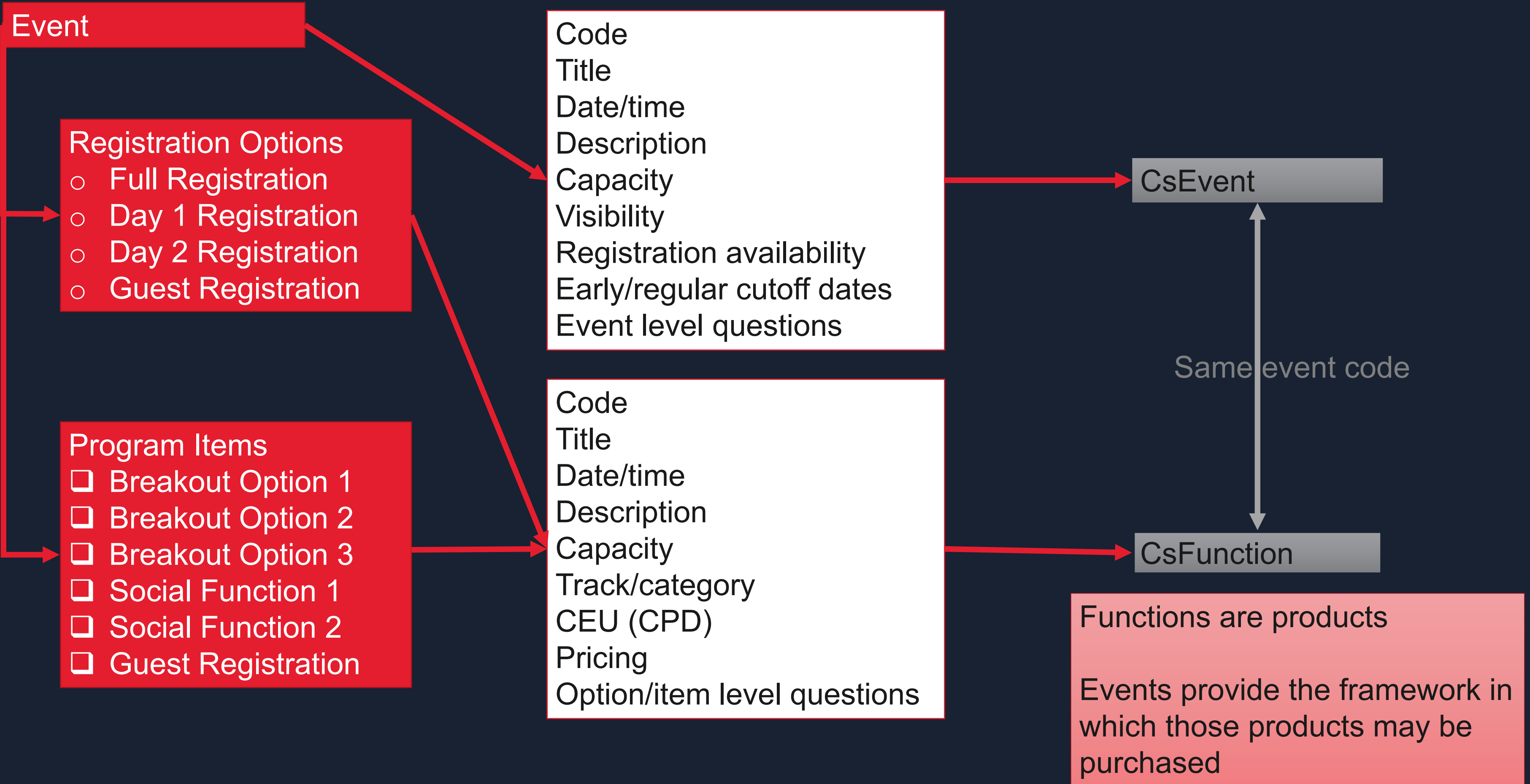
Course Agenda

10am – 12pm AEDT

- The data structure of events and event registrations
- IQA for events and event registrations: detail and summary
- Invoices and transactions for registrations
- Event pricing information
- Event questions and answers

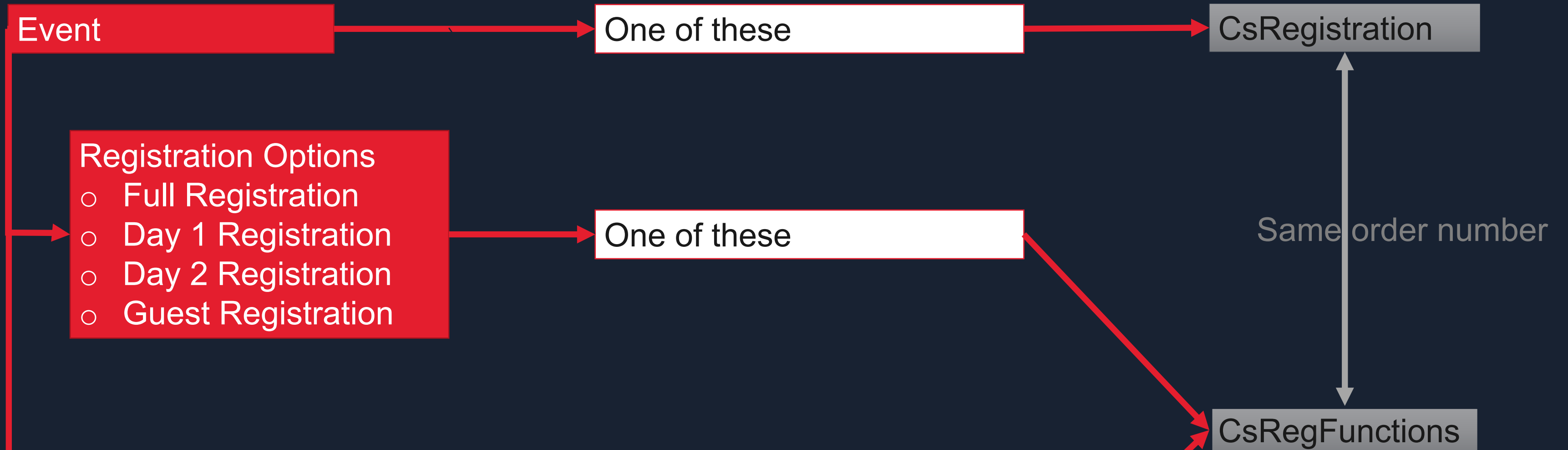
The data structure of events





The data structure of event registrations





Registrations are orders

Function registrations are the individual lines of those orders

CsRegistration

Full Name
Last First
Member Type
Company
Company ID
Company Member Type
Ship To ID
Of the registrant

Bill To ID
Registered By ID

Link to the ID (iMIS ID) of a contact business object to include more information about the:

- Registrant
- Bill to contact/company
- Person entering registration

IQAs for events and event registrations



Let's take a 5-minute break

Grab a refreshment

Please feel free to mute and turn off your camera

Don't close the Zoom session

Event pricing information



CsFunctionFees

Early, Regular and Late pricing for:
NM (non-member)
M (member) and
Any other pricing groups used

The pricing groups are numeric, and you can determine the meaning of those by linking to

ProductPriceSheet

References where pricing groups are used, and the names of those groups

The price sheet field matches the same field in

GroupPriceSheet

Tells you how the pricing group is defined

If the Group ID is a GUID, then it references a

DynamicGroup

Tells you how the dynamic group is defined

The document version key references

Document

References the name of the IQA

Event questions and answers



CsEvent

CsFunction

If you create questions at the event level, the field Form Definition Section ID will link to the field of the same name in

If you create questions at the function level, the field Form Definition Section ID will link to the field of the same name in

FormDefinitionFieldData

Contains definition of questions

The field Form Definition Field ID links to the field of the same name in

FormFieldResponseData

Contains answers to questions

The ID field links to the Ship To ID in

CsRegistration

Questions and Ideas





Next Course: Digital Academy

Data Management & Metrics for Associations

30th August & 1st September: 10 am – 1 pm

AEST





Conrad Henley-Calvert,
Causeis



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9:41



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