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CAUSEIS PRESENTS

Digital Academy for Associations

→ **Course: Member Portal: Self-service and Personalisation**

Digital Academy

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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

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CAUSEIS

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 for the 2nd consecutive year.

iMIS Engagement Management System · higher logic · D2L DESIRE2LEARN · COMPUTER SYSTEM innovations sustainable solutions · ats

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Supported by AuSAE

The home for association professionals.
A place where you belong, connect with others, advance your career and be inspired.

www.ausae.org.au

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AuSAE
The Australasian Society of Association Executives

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Presenters & Facilitators

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Senior Solutions Consultant

Causeis

Yolande Smith

Digital Marketing Specialist

Causeis

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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

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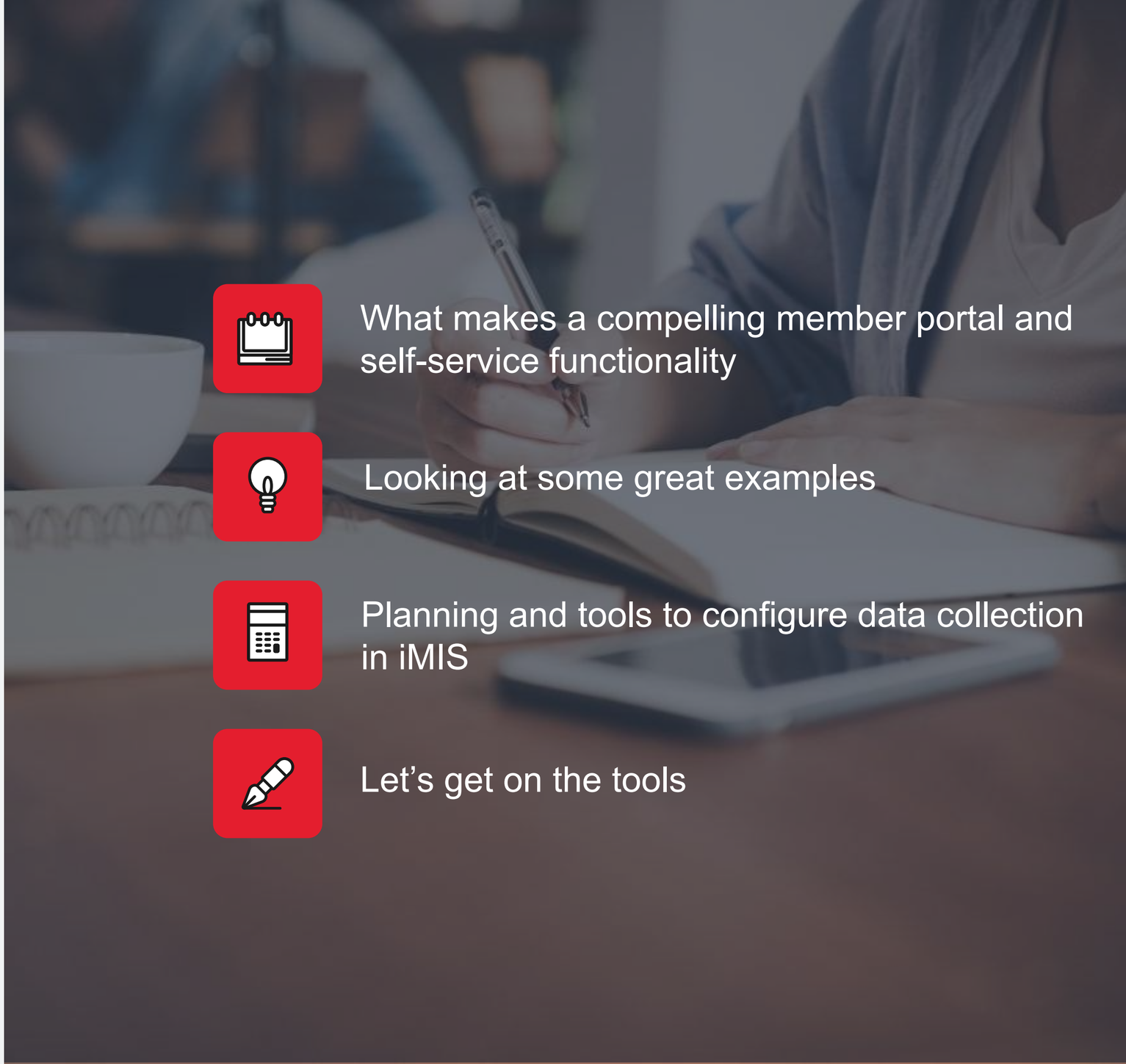
Agenda

Tuesday, 6th December



- What makes a compelling member portal and self-service functionality
- Looking at some great examples
- Planning and tools to configure data collection in iMIS
- Let’s get on the tools

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Let’s start from the beginning …

with a question….

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What makes a great member portal?

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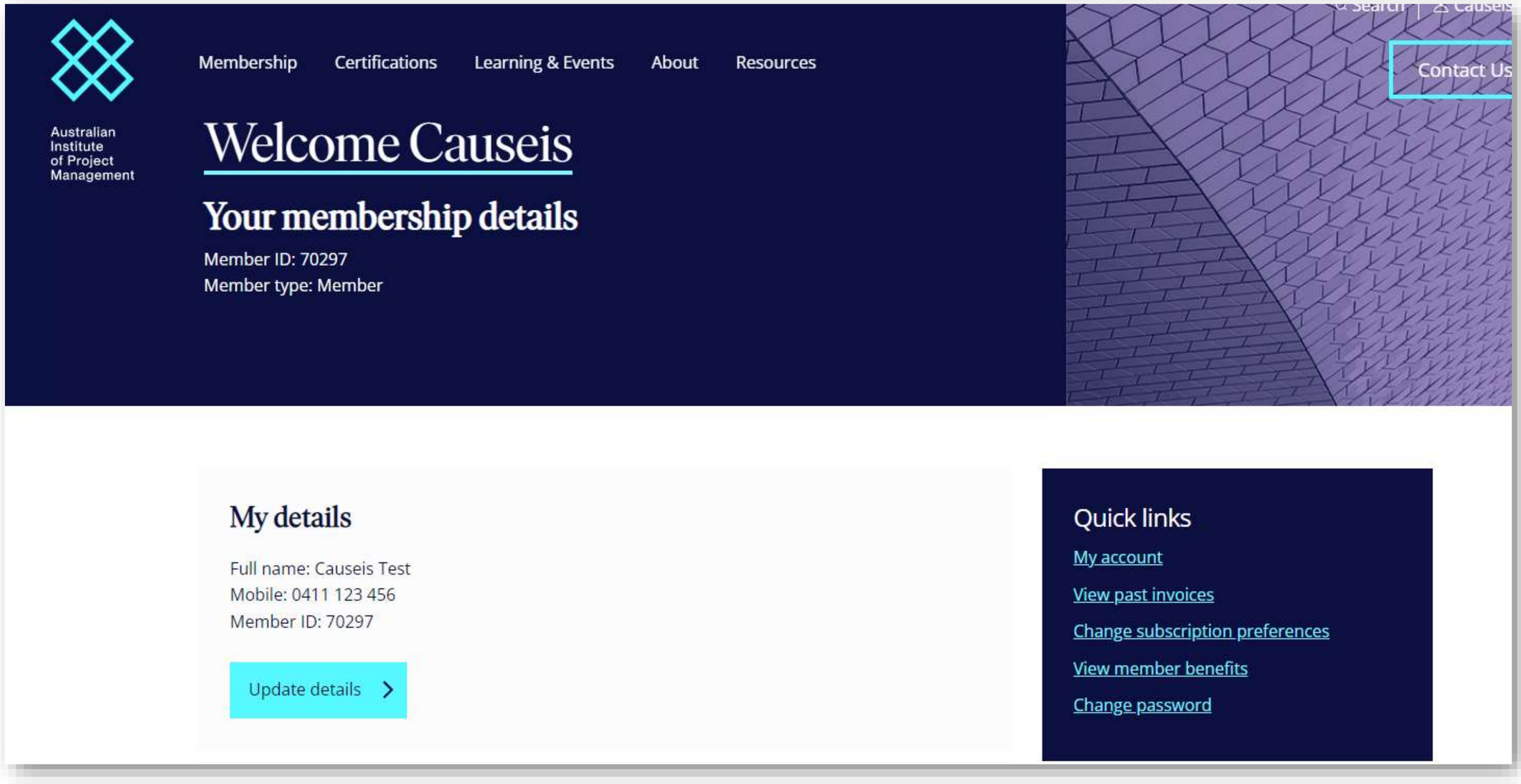

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My CPD

23%

16 of 70 CPD points required by Saturday, 8 March 2025

Update CPD >

Messages

You have no new messages

Upcoming events

View all >

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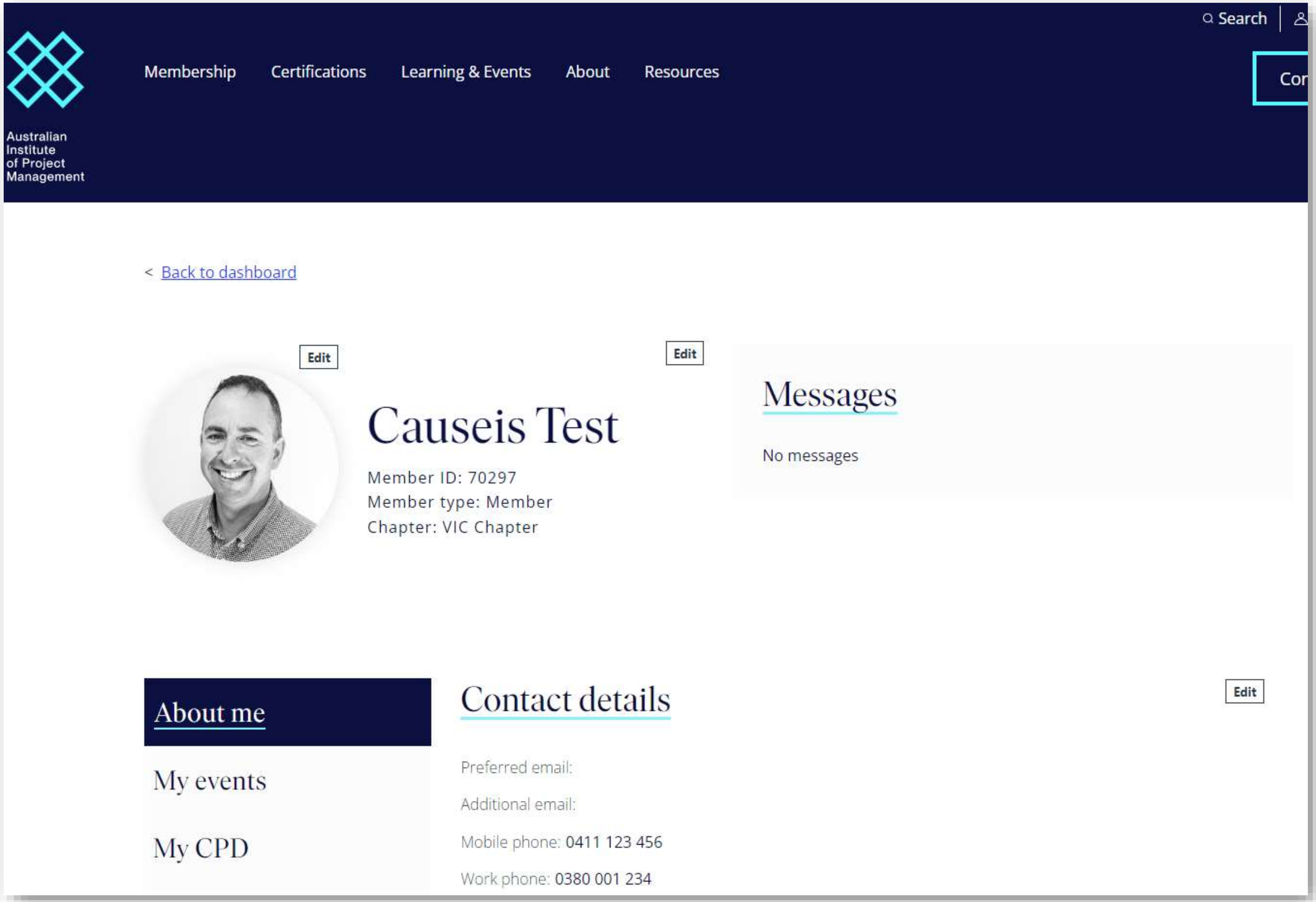

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REIV Member Dashboard

Hi Ashley,

Welcome to the REIV Member Portal, your member ID is [redacted]. Services available on this portal are listed below.

More Information

ABOUT REIV MEMBERSHIP

Order Online

Order a range of products and forms developed for the real estate sector, delivered straight to your door.

SHOP NOW

Manage Your Membership

Pay invoices. Manage membership renewals and Stay up to date with your REIV account.

VIEW INVOICES

RTA Learning Resources

The REIV has prepared a comprehensive online reference book that details the reforms and relevant modules in the legislation and provides interpretation and explanation to assist in implementing the changes.

Now being funded by the Victorian Property Fund with approval from the Minister of Consumer Affairs.

GET ACCESS

Manage Your CPD

Review your CPD status, Access compulsory CPD modules and Request CPD points for external training.

MY CPD

Access Member Rewards

Take advantage of member exclusive discounts, deals, and offers on a wide range of products and services.

ACCESS MEMBER REWARDS

The REIV Diary 2023

REIV 2022 Diaries are now available to order, delivered straight to your door. The REIV Diary is a consolidated, single source

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Australian College of Nursing
neo
NURSE ENGAGEMENT ONLINE

1800 061 660 acn@acn.edu.au

MY BENEFITS | MY COURSES | MY ACCOUNTS | ABOUT

Manage Account: Mr Ashley Hunt

Membership Number 186866 | **Membership Category** General Member

Share the Love

Refer a friend and you will both receive one month of free membership! Your referral c

SEND TO A FRIEND

Shortcuts

CHANGE EMAIL ADDRESS | CHANGE PASSWORD | CHANGE WORKPLACE

My Details | Billing | My Events | Communication Preferences | My Submissions | Faculties

Years of Membership
0

Courses Completed
0

Events Attended
1

Personal Details

Edit

Prefix	Mr
Preferred First Name	Ashley
Mobile Number	0411 123 456
Work Phone	
Home Phone	
Email	ash@causeis.com.au

My Messages

You have no messages

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qnmu Queensland Nurses & Midwives' Union

Pay now | Join now | Hi, Causeis Test | Profile | Log out

About | Membership | News and Stories | Education and Events | Campaigns | Resources

Quick Links

Welcome!

Your 2021/2022 QNMU tax statement is now available in the Tax and billing tab below.

Edit

Causeis Test

Member No: 2041964

My Home | My details | Tax and billing | My preferences | Change my password

My union

My wages and conditions

Personal details

Causeis Test

Billing category

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FWC AWI Wages and allowances Sheet NA2020 - 1 July 2022

Nurses Award 2020 - 1 July 2022

My Key Contacts

There are no records.

My branch

There are no records.

Alternate workplaces

There are no records.

Billing category

Update my details

Update my membership and payment options

Update my communication preferences

Latest news

29 Nurses to rally against

24 Nurses and midwives

23 Statement of support for

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My resources

Torres Strait Islander Nurse Led COVID Vaccination Team

QNMU First Nations Branch members Hylda Wapau (Bamaga Hospital, Nurse Navigator/CNC) and Mary Underwood (Thursday Island Primary Health,...

Sample Statement

Download a sample statement here.

Midwifery role in homebirth

The QNMU supports and promotes the provision of homebirth services across Queensland in both private and public models of care. The Nursing and Midwifery...

CPD Workbook

As a QNMU member, helping you with your professional development is something we take very seriously. Over the years we've developed an unrivalle...

My events

Events I'm attending

No results found

Events near me

There are no records.

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What makes a great member portal?

- It is a tool for the member journey
- It shows personalised, relevant information
- It has the ability for members to self service (e.g. certificates, invoices, reports)
- It has good communication and customised messages
- It has no pain points

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What tools are available in iMIS for us to use?

- A suite of dynamic content items (or iParts) to show information or perform actions
- Panels / Custom Data Sources
- RiSE Content / Themes
- Alerts
- Dashboards & Reporting tools (SSRS, Report Writer)
- Workflows and automations where applicable
- New Tools: iMIS Forms, Query Design Template

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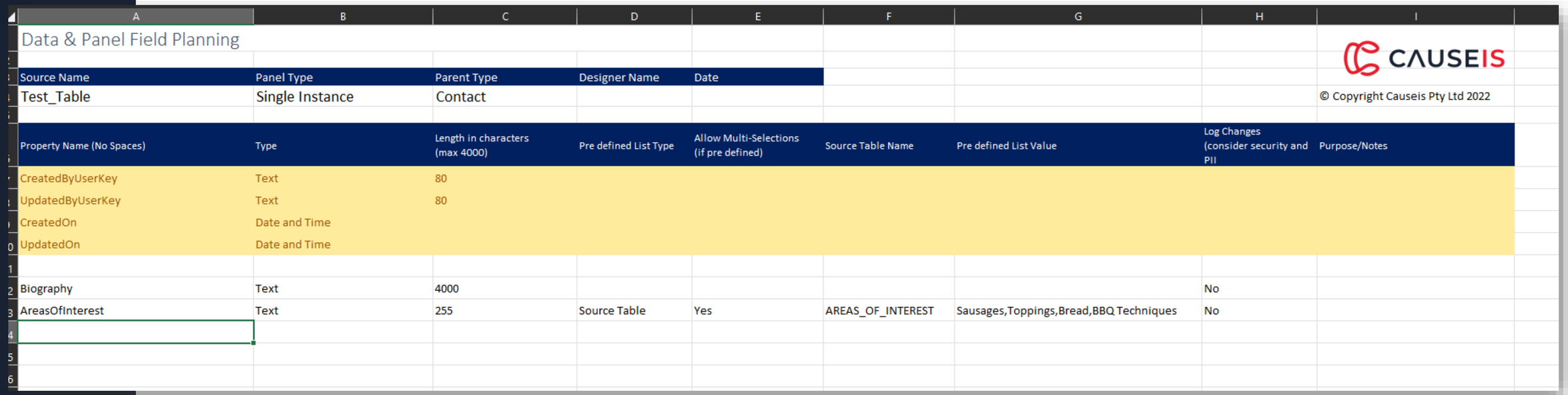
Planning your data source



Data & Panel Field Planning

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Source Name	Panel Type	Parent Type	Designer Name	Date
Test_Table	Single Instance	Contact		

Property Name (No Spaces)	Type	Length in characters (max 4000)	Pre defined List Type	Allow Multi-Selections (if pre defined)	Source Table Name	Pre defined List Value	Log Changes (consider security and PII	Purpose/Notes
CreatedByUserKey	Text	80						
UpdatedByUserKey	Text	80						
CreatedOn	Date and Time							
UpdatedOn	Date and Time							
Biography	Text	4000					No	
AreasOfInterest	Text	255	Source Table	Yes	AREAS_OF_INTEREST	Sausages,Toppings,Bread,BBQ Techniques	No	

https://www.causeis.com.au/datadesigntemplate

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Data Sources Gotcha's and Tips

Gotcha's

- Once you have saved your field / data source you cannot change the properties
- No spaces in property names
- Only staff users and system administrators can edit the panel of a standalone table
- HTML tags are not supported in the Label field
- Only one Multi-Instance source can be use per panel
- No indexing on fields over 400 characters
- If you use a Source table as a lookup list on a property these do not show as selectable filters in an IQA. Use a Query or Explicit list instead

Tips

- Create a naming convention for your property names (e.g. underscores)
- Always use a lookup list, rather than an explicit list – it makes adding values later easier
- Ensure you allow enough length in your properties
- Use Standalone tables where possible for lookup values, this gives more flexibility than General Lookup Tables especially for reporting (no more need for coded values and complex joins)
- Avoid special characters in property names
- Avoid using reserved names for properties
- Check any automations work after adding new properties on an existing data source you may be using to trigger off an automation

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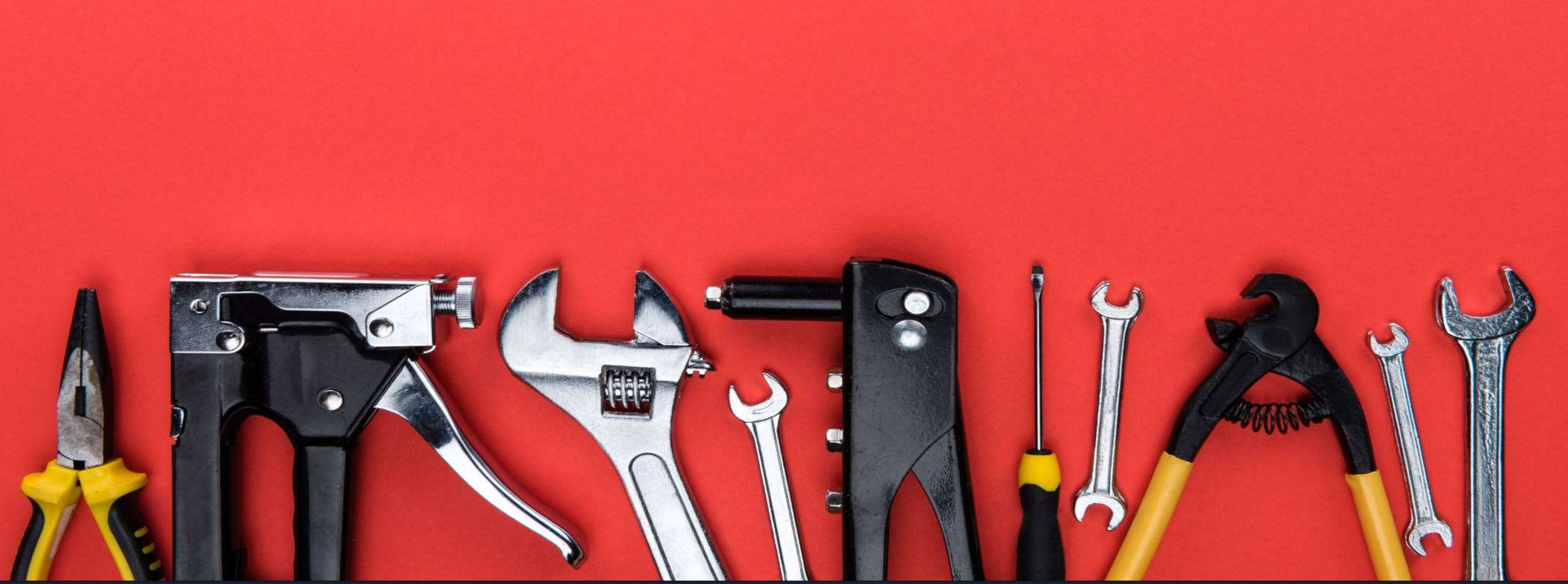

Lets get on the tools

Questions and Ideas

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Digital Academy 2023 is being announced soon!

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