



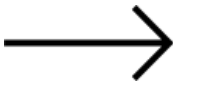
CAUSEIS PRESENTS

Digital Academy for Associations

→ Course: Maintaining your iMIS Dashboards



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.

A place where you belong, connect with others, advance your career and be inspired.

www.ausae.org.au



Presenters



Ashley Hunt, CiP
Senior Solutions Consultant
Causeis



Annie Corless, CiA
Implementation Consultant
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, 8th March

Course Agenda

10am – 12pm AEDT

- Introduction to Dashboards
- How to identify core components
- Looking at existing Dashboards & their components

Tuesday, 8th March

Course Agenda

10am – 12pm AEDT

- 6 things you should know:
 - Which IQA drives a Dashboard
 - Cloning and changing an IQA
- 5 minute break
- How to change a component in an IQA
- How to change a layout
- Query menu
- Adding definition
- Scenario

Introduction to Dashboards

Annie Corless, CiA





Dashboards

✓ Why?

✓ How?

✓ What?

A background image of a desk setup. In the upper right, a round clock with a light wood frame and a white face with black numbers is mounted on a light blue wall. Below the clock, on a dark wood desk, are three books standing upright: two with brown covers and one with a blue cover. To the left of the books is a light wood cylindrical pencil holder filled with various colored pencils and pens. The overall scene is dimly lit, with the desk surface and the objects on it being the primary focus.

How to identify core components

Ashley Hunt, CiP

Look at existing Dashboards & their components Ashley Hunt, CiP





6 Things you should know Annie Corless, CiA Ashley Hunt, CiP



1. How to tell which IQA drives a Dashboard component Annie Corless, CiA



How to tell which IQA drives a dashboard

Easy edit - Click easy edit

Page has turned into edit mode

Edit source query

Locate the IQA

Open the IQA and locate the path

Filters

What are they using as the status and company – shows you the properties it is using

Charts no edit button

Copy location and find it in continuum

But what is ours? What defines ours?

Member types

Click run.

As soon as you change a query. One thing I would do is copy the report and play around with it run it and see what results

Save it and close it. It will refresh the number

Display

Go to configure –locate the path

Easy edit it to locate how things are previously built, quickly come in and step through how it has been built – change progress trackers on the fly. Go through and follow the default

SHOW EMS THE COOL FEATURE

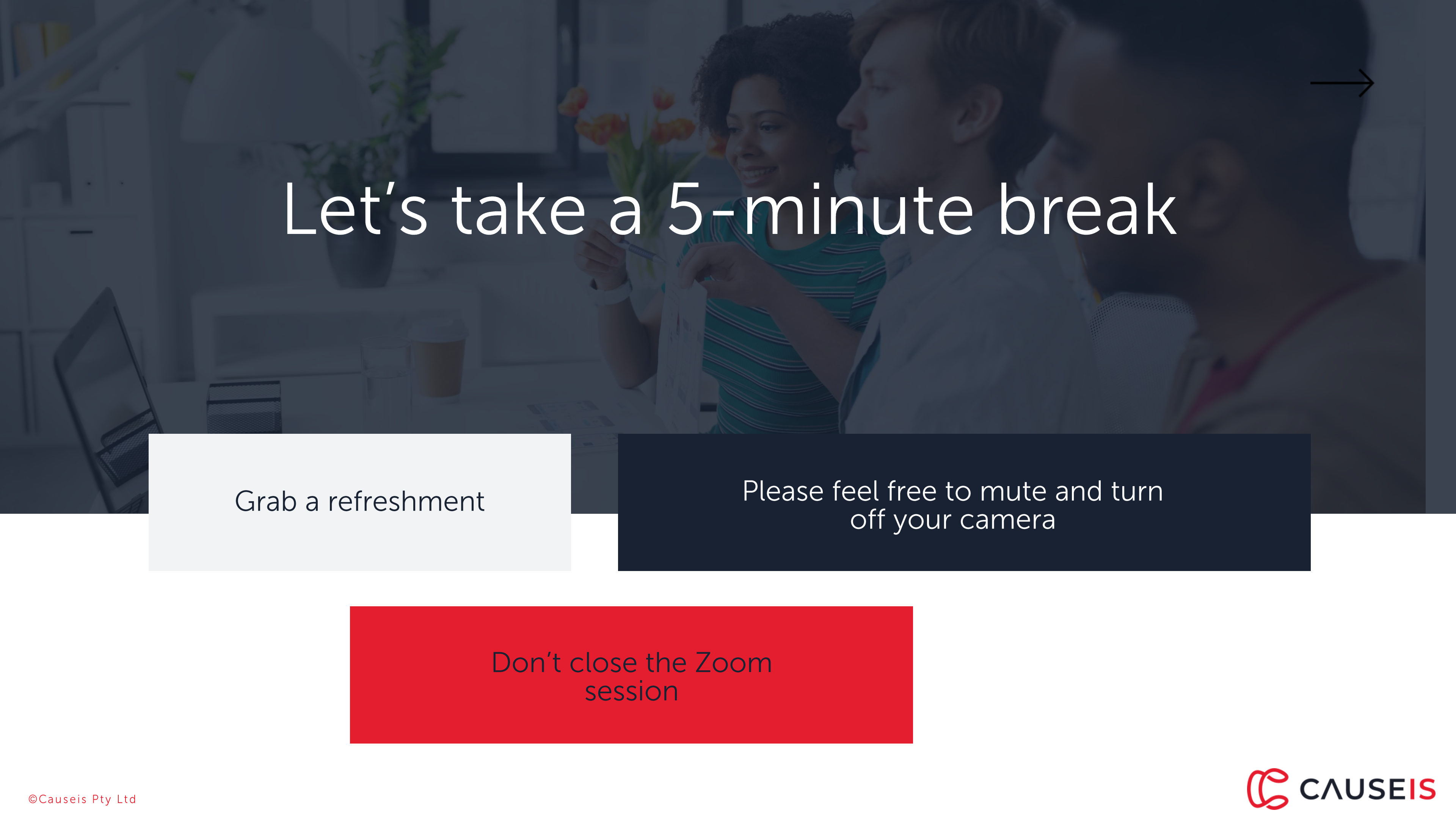


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A background image of a desk setup. In the upper right, a round clock with a light wood frame and a white face with black numbers is mounted on a light blue wall. Below the clock, on a dark wood desk, are three books standing upright: two brown and one blue. To the left of the books is a light wood cylindrical pencil holder filled with various colored pencils and pens. The text '2. Cloning and changing an IQA' and 'Ashley Hunt, CiP' is overlaid in white on the left side of the image.

2. Cloning and changing an IQA

Ashley Hunt, CiP



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

A background image of a desk setup. On the wall is a round clock with a light wood frame and a white face with black numbers. Below the clock, on the desk, are three books standing upright (two brown, one blue) and a wooden pencil holder filled with various colored pencils and pens.

3. How to change a component in an IQA

Annie Corless, CiA



How to change a component

- ✓ We want to turn a progress tracker into a chart?
- ✓ Locate the report
- ✓ I would copy the report and save it into a chart folder or label relabel it chart
- ✓ Count to countil the number and display by member types
- ✓ Save run to see what it looks like.
- ✓ Charts – no edit button
- ✓ Recommend copy and find in continuum to update the report
- ✓ Parameters – chart
- ✓ Data = Counts or total which was our iMIs ID
- ✓ Label = label – descriptor information
- ✓ Fields coming from the IQA
- ✓ Put in a separate title
- ✓ We can select the type of chart play around which one is best. Can do staking grouping – couple of years displaying in one chart. So it would group by years
- ✓ Skin is the colour – phoenix in EMS is my favourite
- ✓ Width and height
- ✓ Tip 0 and 0 responsive – depending on screen size show accordingly to phone or computer
- ✓ Legend – not not need. Hidden or say where I have it displayed. Rotate label – might not fit well if horizontal



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4. How to change a layout of a page

Ashley Hunt, CiP

A wooden clock with a light-colored face and black hands is mounted on a light blue wall. Below the clock, on a wooden desk, is a wooden cup filled with various colored pencils and pens. To the right of the cup are three books standing upright: two brown and one blue. The scene is dimly lit, with the desk surface visible in the foreground.

5. Query menu structure

Ashley Hunt, CiP



6. Adding definitions/ notes

Annie Corless, CiA



Scenario – How to develop a new Dashboard?

Ashley Hunt, CiP
Annie Corless, CiA





How to develop a new Dashboard?

- ✓ Plan and design your dashboard
- ✓ Build new IQA Queries for the charts and reports
- ✓ Create a new Content Page
- ✓ Create the charts with iParts
- ✓ Publish
- ✓ Create a new sitemap link

Questions and Ideas





Next Course: Digital Academy

Rethinking your Renewal Strategy

24th & 25th of March 2022: 10am-1pm AEDT



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