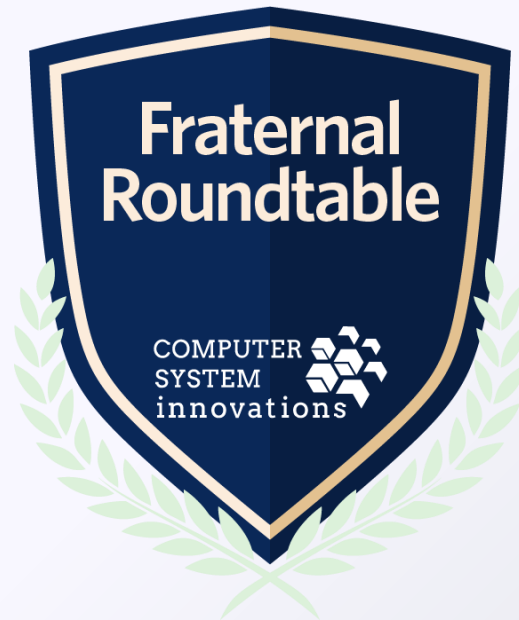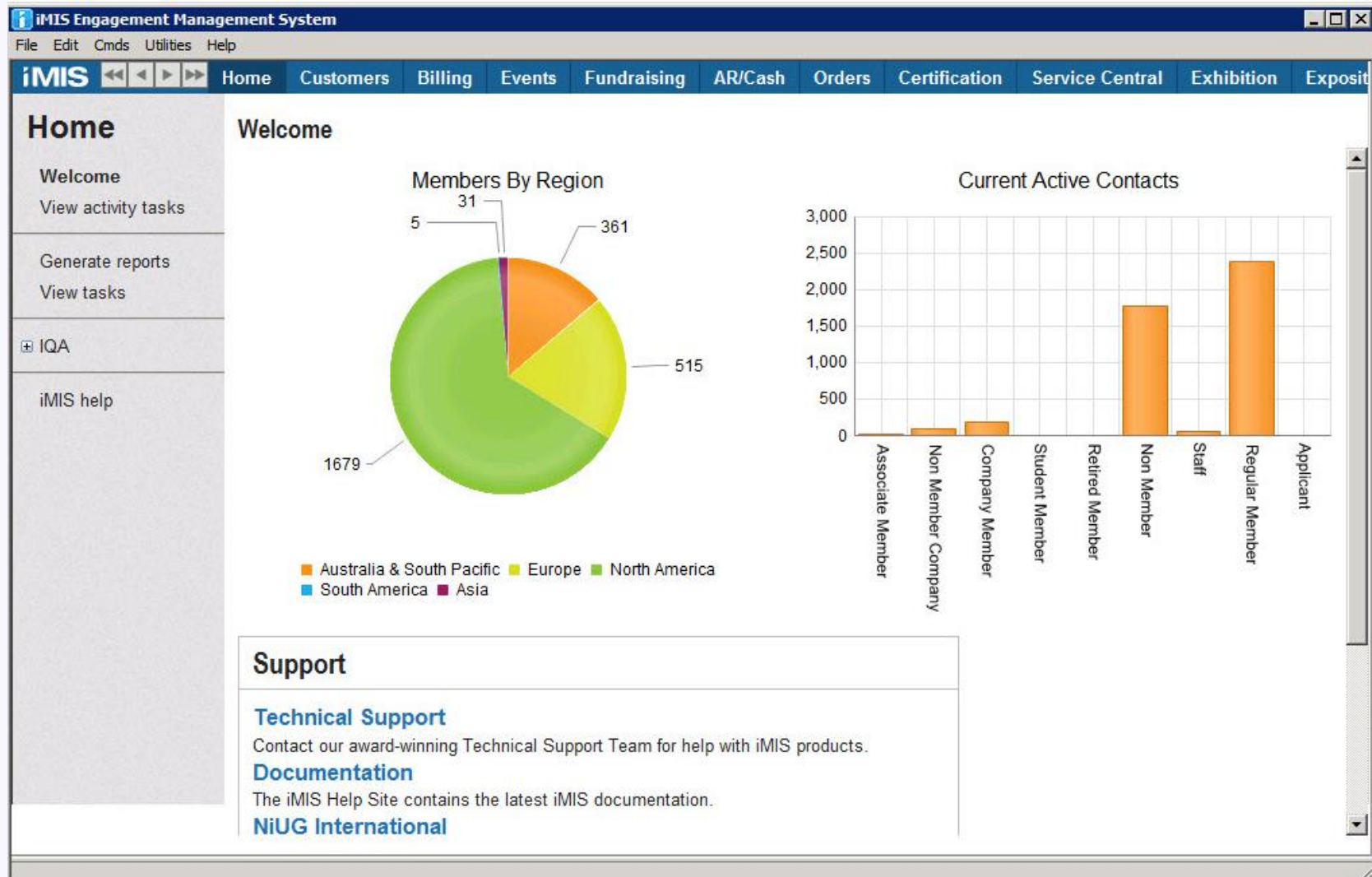# Are you Ready for a World without Desktop?

**Getting Staff Site Ready**

# Farewell old friend...

# Hello Gorgeous...

# Now is the time

- **Re-envision how you and your staff use iMIS**
- **iMIS is no longer a rolodex**
- **Identify key players on your staff**
- **Data clean up / evaluation**
- **Develop your plan for staff site success**

# Where Do I Start?

- **There is no wrong answer!**
    - **Individual / Organization Searches**
    - **Updated Member / Org profile**
    - **Reporting**
    - **Dashboards**

    **Biggest thing to remember... We don't want to "re-create the desktop"**

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# Who should start with Staff Site?

- **Super user from each department**

- **Remote Staff / Traveling Staff**

- **The "frustrated desktop" staff**

- **New staff**

- **Executive Directors**

# Acknowledge differences

- **Navigation**

- **Module/Area naming**

- **Data presentation (Activities)**

| iMIS Desktop | iMIS Staff Site |
|:---:|:---:|
| Customers | Community |
| Billing | Membership |
| Orders | Commerce |
| AR/Cash | Finance |
| Generate reports | Continuum |

# Review your access levels

- **Review and rethink who has access to what!**

- **iMIS should be core in your day to day work**

- **More intuitive means more can use it.**

- **ASI Documentation**
  - **http://help.imis.com/iMIS2017/Features/Community/Module_authorization_levels.htm**

# Review your access levels

## Membership

> 🖊 **Note:** See [Contact account pages (Party.aspx)](#) for more specific information about security when viewing contact and organization pages.

| Navigation Item | Security Set | Level Assignment | License Required |
|---|---|---|---|
| Dashboard | All Staff Full Control | Customers: 2 - Reports | |
| Chapters | All Staff Full Control | | |
| Manage expired members | All Staff Full Control | Dues: 8 - System Setup | |
| *Automatic payments:* | | | |
| • Dashboard | All Staff Full Control | | Yes |
| • Process payments | All Staff Full Control | Dues: 4 - Full Entry/Edit | Yes |
| • Review payments | All Staff Full Control | Dues: 4 - Full Entry/Edit | Yes |
| • Enrollments | All Staff Full Control | Customers: 4 - Full Entry/Edit | Yes |
| Billing cycles | All Staff Full Control | Dues: 5 - Table Maintenance | |
| Billing products | All Staff Full Control | Dues: 5 - Table Maintenance | |

# Data Clean Up & Evaluation

- **Organization is key**
  - 5 desktop tabs can be 1 staff site time
- **Prioritize the data you use**
- **Inventory what data you are maintaining outside of iMIS**
  - Lists
  - Google docs

- **What data should you be tracking? Or want to track?**
- **Outline your need for new sources**

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# Developing Your Plan

# Utilize iMIS Champions

- **One per department**

- **Super Users**

- **Identify their tasks**
  - Develop a wish list
  - Define data challenges

# Customize Searches

- **Replace ad hocs with contact searches**

- **Add your custom / preferred demographics**
  - **Maiden name**
  - **Initiation date**
  - **Lifetime giving**

# Individual & Organization Profiles

- **Identify profile needs**
  - **Member**
  - **Chapter**
  - **Donor**
  - **House Corporation**

- **Show the exact data you need**

# Reporting

- **Say goodbye to Crystal reports!**
- **IQAs with filters can eliminate the need for multiple crystal reports**
- **Review the existing reports in the staff site.**
- **Have your staff log reports they are running**
  - **Frequency**
  - **Business Critical**
  - **Edits/Updates**

# Dashboard Planning

- **Don't be limited by the desktop**

- **Sketch it out in whatever works for you!**
  - **Excel**
  - **White board with Post-its**

    - **Pro Tip: Copy a core dashboard and edit it as needed**

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# Ensuring Success

# Process Documentation

Make sure to have documented procedures that are reviewed annually

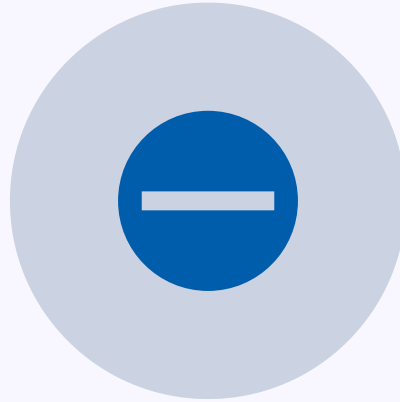Cross train staff on procedures to reduce errors during transition

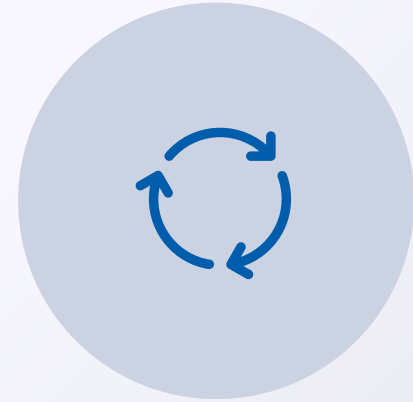Provide continuous training opportunities / micro trainings

# Start. Stop. Stay

**START** EVERYDAY WORKING IN THE STAFF SITE

**STOP** WHEN YOU RUN INTO AND ISSUE AND DOCUMENT IT

**STAY** COMMITTED TO THIS PROCESS

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# Use Your Resources

- **Fraternal Focus Listserve**
- **ASI Sprint Reviews**
- **NiUG Conferences and Listserve**
- **CSI of course**

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# Question Time

**For those of you with staff site configured for your needs, what has been the most help thing getting there?**

**Advice you would offer other just getting started?**

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# Questions?

# Next Up...

## IQA Queries 101

**- Stay right where you are!**

## 5 Cool Things You Can Do in RiSE

***This session requires some working knowledge of IQA and RiSE**

**- Will need to Switch Zoom Links**

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