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ASI Training Overview

We provide a wide range of training courses designed for new and experienced users. Classes are held on a regular schedule at ASI offices worldwide, delivered remotely via the Web, or held at other regional locations based on demand.

At Your Desk Training
Learn about iMIS without leaving your desk! At your desk training is typically one to three hours in length, instructor-led, and delivered using the latest online interactive technologies.

For each class, you will be provided with a remote connection to the instructor, a toll-free conference call number, and your own remote image to view the instructor’s workstation and complete the exercises and labs. All you need is a phone line, and the ability to use Remote Desktop Connection to another server.

Classroom Training
Learn alongside your peers at training facilities in Alexandria, VA; Austin, TX; London, UK; Toronto, ONT, CA; and Melbourne, Australia. Classroom training courses are typically one to three days in length, instructor-led, and students are provided with computer workstations and workbooks for hands-on training.

On-Site Training
Training when and where you want! On-Site Training is designed to assist customers who wish to educate multiple staff members at one time while limiting the time and expense of staff traveling out of town for training. With as few as five students (minimum number of students), ASI can bring most training classes to your facilities (hardware restrictions may apply). Pricing discounts will depend on the number of students and the courses elected.

Contact ASI Training

Web: www.advsol.com/training

e-Mail: training@advsol.com

Phone:
- North America: 1 800 727 8682
- Europe: 0203 267 0067
- Asia-Pacific: 1800 240 122 or +61 3 9869 7500 (0800 230 122 from New Zealand)
Course List by Category

AYD: At Your Desk - conducted online with an instructor. These courses can be one or more sessions in length. When you sign up for the course, you are registering for all the sessions for that course over the schedule defined on the web site. So please be sure you can attend all the sessions for the entire course.

F2F: Face to Face - conducted in a classroom with an instructor

New Classes

<table>
<thead>
<tr>
<th>Category</th>
<th>Course Details</th>
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</thead>
<tbody>
<tr>
<td>New</td>
<td>iMIS 20 Principles for Partners (F2F, 3 days, NB Pricing)</td>
</tr>
<tr>
<td></td>
<td>Certified iMIS Extension Developer (F2F, 3 days, NB Pricing)</td>
</tr>
<tr>
<td></td>
<td>Introduction to SQL Server Reporting Services (SSRS) with iMIS (AYD, 2 sessions)</td>
</tr>
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General

<table>
<thead>
<tr>
<th>Category</th>
<th>Course Details</th>
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<tbody>
<tr>
<td>iMIS Overview</td>
<td>iMIS Overview for Associations (F2F, 3 days)</td>
</tr>
<tr>
<td></td>
<td>iMIS Overview for Fundraisers (F2F, 3 days)</td>
</tr>
<tr>
<td>iMIS Implementation</td>
<td>iMIS Implementation (F2F, 2 days)</td>
</tr>
<tr>
<td>Reporting</td>
<td>Introduction to SQL Server Reporting Services (SSRS) with iMIS (AYD, 2 sessions) <em><strong>NEW</strong></em></td>
</tr>
<tr>
<td></td>
<td>Introduction to IQA (Intelligent Query Architect) (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td>Advanced IQA (Intelligent Query Architect) (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td>Applying IQA with iMIS (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td>Crystal Reports for iMIS (F2F, 2 days)</td>
</tr>
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</table>

Modules in Focus

<table>
<thead>
<tr>
<th>Category</th>
<th>Course Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customers</td>
<td>Customer Management for End Users (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td>Customer Management - Advanced Topics (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td>Customer Management for Administrators (AYD, 1 session)</td>
</tr>
<tr>
<td>Category</td>
<td>Course Name</td>
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<tr>
<td>--------------------------</td>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>Events</td>
<td><strong>Events for End Users</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>Events Setup</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>Events Management</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td>Billing</td>
<td><strong>Billing/Dues for End Users</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>Billing/Dues for Administrators</strong> (AYD, 1 session)</td>
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<tr>
<td></td>
<td><strong>Billing/Dues - Miscellaneous Topics</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td>Orders</td>
<td><strong>Order Entry for End-Users</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>Orders for Managers</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>Orders - Inventory Management</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td>AR/Cash</td>
<td><strong>AR/Cash for End-Users</strong> (AYD, 1 session)</td>
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<td></td>
<td><strong>AR/Cash for Managers</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>AR/Cash Add-ons for Managers</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td>iDashboards</td>
<td><strong>iDashboards</strong> (AYD, 3 sessions)</td>
</tr>
<tr>
<td>Process Manager</td>
<td><strong>Introduction to Process Manager</strong> (AYD, 2 sessions)</td>
</tr>
<tr>
<td>Fundraising</td>
<td><strong>iMIS Fundraising</strong> (F2F, 2 days)</td>
</tr>
<tr>
<td></td>
<td><strong>iMIS Overview for Fundraisers</strong> (F2F, 3 days)</td>
</tr>
<tr>
<td>Applications Manager</td>
<td><strong>Introduction to Applications Manager for iMIS</strong> (AYD - 2 sessions)</td>
</tr>
<tr>
<td>WebFormz</td>
<td><strong>Introduction to WebFormz for iMIS</strong> (AYD - 2 sessions)</td>
</tr>
<tr>
<td>Technical Focus</td>
<td></td>
</tr>
<tr>
<td>Business Object Designer</td>
<td><strong>Business Object Designer</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td>(BOD)</td>
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</tr>
<tr>
<td>System Administration</td>
<td><strong>System Admin - Upgrades and Configuration</strong> (AYD, 1 session)</td>
</tr>
<tr>
<td></td>
<td><strong>System Admin - Tailoring, Security and Maintenance</strong> (AYD, 1 session)</td>
</tr>
</tbody>
</table>
iMIS Training Catalog

Web

**iMIS RISE** (F2F, 2 days)

- **iMIS RISE Configuration and Administration** (AYD - 3 sessions)
- **iMIS RISE for Content Managers** (AYD, 1 session)

TaskCentre

**iMIS TaskCentre** (F2F, 2 days)

- **Introduction to iMIS Task Centre** (AYD, 3 sessions)

Programming

**Certified iMIS Extension Developer** (F2F, 3 days, NB Pricing)

- **iMIS SDK (iParts, SOA, and iBO)**
  - **Programming** (F2F, 2 days)
  - **Introduction to iMIS SDK (iParts, SOA, and iBO)** (AYD, 4 sessions)

For Partners / Consultants

**iMIS 20**

- **iMIS 20 Principles for Partners** (F2F, 3 days, NB Pricing) ***NEW***

**iMIS** Implementation

- **iMIS Implementation** (F2F, 2 days)
Advanced iQA (Intelligent Query Architect)

This on-line workshop covers advanced functions and complex queries as well as how to organize your folders and queries.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Organizing and securing queries
- Using advanced functions and filters
- Performing complicated joins
- Building a query on a query
- Adding a query to the left index of a window

### Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>iQA Basics (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Using filters</td>
</tr>
<tr>
<td></td>
<td>Document system</td>
<td>Using aggregates</td>
</tr>
<tr>
<td></td>
<td>Folders</td>
<td>Using SQL expressions</td>
</tr>
<tr>
<td></td>
<td>Security</td>
<td>Using Business objects</td>
</tr>
<tr>
<td></td>
<td>Building UD objects</td>
<td>Query of queries</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Using Navigation designer</td>
</tr>
</tbody>
</table>

### Summary

**Outline topics:**
Advanced query creation
Complex joins

**Delivery:**
At your desk

**Duration:**
2 hours
See training schedule

**Target Audience:**
This course is designed for:
- Anyone who needs simple access to iMIS data for reporting

**Course objectives:**
Attendees will obtain a good working knowledge of:
- Document system
- iQA uses

**Pre-requisites:**
- Basic knowledge, such as completing the IMIS Overview class
- Completion of Intro to iQA

**Pricing and more info:**
training@advsol.com
www.advsol.com/training
Applying iQA with iMIS

This on-line workshop covers how to apply queries to modify and build new product screens. Learn how in iMIS, you can take advantage of these advanced IQA features.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Live links in IQA query results
- In-place editing of list-based queries
- Query Menu offers choice of queries to run
- Query Chart Viewer renders queries graphically
- Query Profile Picture List displays images
- SSRS Report embeds exportable iMIS reports

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Export Basics (30 minutes)</th>
<th>Change screens (1.5 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Live links</td>
</tr>
<tr>
<td></td>
<td>Document system</td>
<td>In-place screen editing</td>
</tr>
<tr>
<td></td>
<td>At query run time</td>
<td>Query menu</td>
</tr>
<tr>
<td></td>
<td>Word Merge</td>
<td>Query based list</td>
</tr>
<tr>
<td></td>
<td>Reporting</td>
<td>Query based chart</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Query based profile images</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Query based reporting</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Exporting query results
- Building interfaces with queries

Delivery:
- At your desk

Duration:
- 2 hours
- See training schedule

Target Audience:
- Anyone who wants to modify interfaces in iMIS

Course objectives:
- Attendees will obtain a good working knowledge of:
  - Document system
  - Using IQA queries as a source

Pre-requisites:
- Basic knowledge, such as completing the IMIS Overview class
- Completion of Intro to iQA

Pricing and more info:
- training@advsol.com
- www.advsol.com/training
AR/Cash for Managers

This on-line workshop is the second in a series of three on A/R Cash. It focuses on setting up the module, options for changing your configuration, batch security, credit card authorization, reporting and month-end procedures.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Overview and basic setup options
- Table setup
- Configuration for batch control and the general ledger
- Credit card authorization
- Month-end procedures

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>A/R Cash &amp; Credit Card Authorization (1 hour)</th>
<th>Month-end Procedures &amp; Reporting (1 hour)</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>• Overview</td>
<td>• Overview</td>
</tr>
<tr>
<td></td>
<td>• Financial entities</td>
<td>• Reconciliation of outstanding credit balances</td>
</tr>
<tr>
<td></td>
<td>• Basic options</td>
<td>• Issuance of refunds</td>
</tr>
<tr>
<td></td>
<td>• Table setup</td>
<td>• Table setup</td>
</tr>
<tr>
<td></td>
<td>• Batch control</td>
<td>• Mass credit/debit write-off</td>
</tr>
<tr>
<td></td>
<td>• General ledger interface</td>
<td>• Perform the GL interface export</td>
</tr>
<tr>
<td></td>
<td>• Credit card authorization</td>
<td>• Reporting</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
System set up
Table set up
Credit card authorization
Month-end procedures
Reporting

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- Managers who may not have been part of the configuration team or need a refresher

Course objectives:
Attendees will obtain a good working knowledge of:
- AR/Cash set up
- Credit card processing
- Month-end procedures

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
AR/Cash Add-ons for Managers

This on-line workshop is the third in a series of three on A/R Cash. It focuses on aspects of A/R Cash that are optional including Deferred Income (Billing & Events), Multiple entities and Due-To/Due-From.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Deferred income
- Multiple Entity Processing
- DueTo/DueFrom Processing

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Deferred Income (1 hour)</th>
<th>Multi-Entity Processing (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Overview</td>
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<tr>
<td></td>
<td>Enabling</td>
<td>Enabling</td>
</tr>
<tr>
<td></td>
<td>Processing</td>
<td>Processing by module/area</td>
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<tr>
<td></td>
<td>Converting</td>
<td>Reporting</td>
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<tr>
<td></td>
<td>Reporting</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Deferred Income  
Multi-entity processing  
DueTo/DueFrom processing

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- Managers who may not have been part of the configuration team or need more information on these modules

Course objectives:
Attendees will obtain a good working knowledge of:
- Deferred income
- Multi-Entity Processing

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com  
www.advsol.com/training
AR/Cash for End Users

This on-line workshop is the first in a series of three on A/R Cash. It focuses on the end-user who works with batches, enters sales transactions, simple orders, cash receipts and applies payments.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Batch control
- Simple orders
- Sales transactions
- Cash receipts
- Adjusting journal entries

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Batch control &amp; Simple Orders (1 hour)</th>
<th>Direct Transactions (1 hour)</th>
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<tbody>
<tr>
<td>Overview</td>
<td>Overview</td>
<td>Overview</td>
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<tr>
<td>Unposted transactions</td>
<td>Sales transactions</td>
<td></td>
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<tr>
<td>Working with batches</td>
<td>Cash receipts</td>
<td></td>
</tr>
<tr>
<td>Overview</td>
<td>Credit memos</td>
<td></td>
</tr>
<tr>
<td>Entering orders</td>
<td>Debit memos</td>
<td></td>
</tr>
<tr>
<td>Entering payments</td>
<td>Reporting</td>
<td></td>
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<td>Invoicing orders</td>
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</table>

Summary

Outline topics:
- Batch control
- Simple orders
- Cash receipts

Delivery:
- At your desk
- Duration: 2 hours
- See training schedule

Target Audience:
- New users in the department
- Temps
- Anyone who needs an accounting refresher

Course objectives:
- Attendees will obtain a good working knowledge of:
  - Batches
  - Orders
  - Receipts
  - Transaction ledgers

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
- training@advsol.com
- www.advsol.com/training
Billing/Dues - Miscellaneous Topics

This on-line workshop is the third in a series of three on Billing. It focuses on accrual dues, billing importer and modifying expired members.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Accrual dues
- Billing importer
- Modifying expired members

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Accrual dues (1 hour)</th>
<th>Billing payment importer &amp; Expired customers (1 hour)</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Overview</td>
</tr>
<tr>
<td></td>
<td>Basic options</td>
<td>Using Billing importer</td>
</tr>
<tr>
<td></td>
<td>Creating billing cycles</td>
<td>Overview</td>
</tr>
<tr>
<td></td>
<td>Running individual billing</td>
<td>Managing expired customers</td>
</tr>
<tr>
<td></td>
<td>Running mass dues billing</td>
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</tr>
<tr>
<td></td>
<td>Troubleshooting</td>
<td></td>
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<td>Payments</td>
<td></td>
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<td>Adjustments</td>
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</table>
Billing/Dues for Administrators

This on-line workshop is the second in a series of three on Billing. It focuses on setting up the module, options for changing your configuration, table maintenance, special pricing and reporting.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Overview and basic setup options
- Table setup
- Basic subscription products

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Billing Overview &amp; Set up (1 hour)</th>
<th>Billing table maintenance &amp; reporting (1 hour)</th>
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</thead>
<tbody>
<tr>
<td>• Overview</td>
<td>• Overview</td>
<td>• Overview</td>
</tr>
<tr>
<td>• Understanding the process</td>
<td>• Understanding the process</td>
<td>• Setting up customer types</td>
</tr>
<tr>
<td>• Basic options</td>
<td>• Basic options</td>
<td>• Setting the reminder notices</td>
</tr>
<tr>
<td>• Defining product codes</td>
<td>• Defining product codes</td>
<td>• Defining special pricing</td>
</tr>
<tr>
<td>• Creating billing cycles</td>
<td>• Creating billing cycles</td>
<td>• Creating Name_All</td>
</tr>
<tr>
<td>• Testing the setup</td>
<td>• Testing the setup</td>
<td>• Defining prorating</td>
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<tr>
<td>• Billing accounting</td>
<td>• Billing accounting</td>
<td>• Setting up list billing</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
System set up  
Table set up  
Special pricing

Delivery:
At your desk

Duration:
2 hours  
See training schedule

Target Audience:
This course is designed for:
• Managers who may not have been part of the configuration team or need a refresher

Course objectives:
Attendees will obtain a good working knowledge of:
• Billing set up  
• Special pricing  
• Reporting

Pre-requisites:
• Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com  
www.advsol.com/training
Billing/Dues for End Users

This on-line workshop is the first in a series of three on Billing. It focuses on understanding the billing process, terminology, basic setup of individual and en masse billing payments, re-Billing and printing reminder notices.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Cash dues billing
- Cash dues payments

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Cash billing (1 hour)</th>
<th>Cash payments (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Overview</td>
<td>• Overview</td>
</tr>
<tr>
<td></td>
<td>• Terminology</td>
<td>• Entering full payments</td>
</tr>
<tr>
<td></td>
<td>• Understanding the billing process</td>
<td>• Entering partial payments</td>
</tr>
<tr>
<td></td>
<td>• Running mass dues billing</td>
<td>• Entering over payments</td>
</tr>
<tr>
<td></td>
<td>• Running individual billing</td>
<td>• Using an open credit to pay</td>
</tr>
<tr>
<td></td>
<td>• Re-Billing</td>
<td>• Adjusting payments</td>
</tr>
<tr>
<td></td>
<td>• Reminder notices</td>
<td>• Subscription payments</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Cash dues billing
Cash dues payments

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs an billing refresher

Course objectives:
Attendees will obtain a good working knowledge of:
- Cash dues billing
- Cash dues payments

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Business Object Designer

The Business Object Designer (BOD) is an administrator-level tool for viewing, editing, and creating iMIS business objects for .NET. It provides a graphical user interface to the properties, constraints, and actions related to business objects. BOD has a facility to generate code for the business objects, which .NET compiles on the fly.

This on-line workshop covers the basics and best practices of using the iMIS Business Object Designer.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:
- Business objects
- Building user defined tables into business objects
- Modifying existing business objects

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>BOD (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding business objects</td>
<td>Add fields to UD tables</td>
<td></td>
</tr>
<tr>
<td>Working with the designer</td>
<td>Relabel object properties</td>
<td></td>
</tr>
<tr>
<td>Field References</td>
<td>Add a look up table to a property</td>
<td></td>
</tr>
<tr>
<td>Examples</td>
<td>Add a new property to a business object</td>
<td></td>
</tr>
<tr>
<td>Reports and output processes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- UD fields and Business Objects
- Updating property prompts
- Adding value displays
- Adding properties to a Business Object

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- Beginning BOD Users

Course objectives:
Attendees will obtain a good working knowledge of:
- Business objects and their uses

Pre-requisites:
- Completion of the Advanced iQA At Your Desk training

Pricing and more info:
training@advsol.com
www.advsol.com/training

www.advsol.com
Certified iMIS Extension Developer

This in-depth three-day class covers the key fundamentals for developers looking to extend iMIS. The class goes through all the elements needs to create upgradable and scalable extensions to iMIS.

The class is designed for experienced iMIS users and .NET developers seeking to understand the proper methods to extend iMIS. We will dig deep into best practices for development, testing and tuning your iMIS extensions. To verify that you have understood these best practices and standards, this class has a certification exam. Passing this exam will give you on-going access to a certified iMIS Extension Developer standards portal.

Attendees will have learned, practiced, and be certified on:
- Developing to ASI production standards
- Creating static and dynamic data driven portals using iMIS RiSE
- Inheriting iMIS RiSE look, feel, and usability
- Extending iMIS functionality
- Testing and debugging iMIS extensions

<table>
<thead>
<tr>
<th>Day 1 Vision</th>
<th>Architecture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Vision</td>
<td>iMIS Architectural Foundation</td>
</tr>
<tr>
<td>Minimize Omnis Footprint</td>
<td>Leveraging iMIS database tools</td>
</tr>
<tr>
<td>Phasing out the “Staff Web Site”</td>
<td>Reporting the SSRS way</td>
</tr>
<tr>
<td>Agile at ASI</td>
<td></td>
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<table>
<thead>
<tr>
<th>Day 2 iMIS RiSE &amp; Design</th>
<th>Performance Testing</th>
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<tbody>
<tr>
<td>Harnessing the Power of RiSE</td>
<td>Review of Standard iParts and using iMIS RiSE</td>
</tr>
<tr>
<td>Crafting a Visually Appealing Website with iMIS RiSE</td>
<td>Testing iMIS Extensions</td>
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<tr>
<td>Focusing on Usability and Aesthetics</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Day 3 iParts</th>
<th>Debugging &amp; Certification Exam</th>
</tr>
</thead>
<tbody>
<tr>
<td>Making healthy choices for your iParts</td>
<td>Developing and Debugging iMIS Extensions</td>
</tr>
<tr>
<td>Developing iParts – Advanced Topics</td>
<td>Certified iMIS Extension Developer Exam and Review</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Developer Standards
- iMIS RiSE
- iParts
- Extending iMIS
- Testing and performance

Delivery:
Face to face

Duration:
3 days
From 9:00 – 5:00 pm

Target Audience:
This course is designed for:
- Partner developers
- End user developers

Course objectives:
Attendees will obtain a good working knowledge of:
- Developer Standards
- iMIS RiSE
- iParts
- Extending iMIS
- Performance

Pre-requisites:
- iMIS Overview
- Several years of software development experience with C# and .NET.

Pricing and more info:
training@advsol.com
www.advsol.com/training
Customer Management for Administrators

This on-line workshop is the third in a series on Customer management and is designed for the database administrator. It explores the various configuration options and features.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Module set up
- Tables; set up, layouts, building guidelines
- Committee and Chapter management
- Creating user defined tables
- Security

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Customers (1 hour)</th>
<th>Customers (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Table Maintenance</td>
<td>Activity types</td>
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<tr>
<td></td>
<td>Overview</td>
<td>Change log</td>
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<tr>
<td></td>
<td>iMIS Table Layouts</td>
<td>International addresses</td>
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<tr>
<td></td>
<td>Defining customer types</td>
<td>Advanced options</td>
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<tr>
<td></td>
<td>Committee management</td>
<td>Customizer Overview</td>
</tr>
<tr>
<td></td>
<td>Chapter management</td>
<td>SQL Reserved words</td>
</tr>
<tr>
<td></td>
<td>Set up module</td>
<td>Tips</td>
</tr>
<tr>
<td></td>
<td>General/Validation tables</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- System set up
- Table set up
- Chapter & Committee management
- Customizer

Delivery:
- At your desk

Duration:
- 2 hours
- See training schedule

Target Audience:
- This course is designed for:
  - Database administrators
  - Managers

Course objectives:
- Attendees will obtain a good working knowledge of:
  - Customer management
  - Chapter & Committee management
  - Customizer

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
- training@advsol.com
- www.advsol.com/training
Customer Management – Advanced Topics

This on-line workshop is the second in a series on Customer management and explores the more advanced features including letters, activity attachments, Committee & Chapter management and reporting.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Customer communication options
- Importing activities
- Committee management
- Chapter management

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Customer Communication (1 hour)</th>
<th>Committee &amp; Chapter management (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td></td>
<td>Assigning to a committee</td>
</tr>
<tr>
<td>Profiles</td>
<td></td>
<td>Maintaining committee minutes</td>
</tr>
<tr>
<td>Letters</td>
<td></td>
<td>Assigning to a chapter</td>
</tr>
<tr>
<td>Emails</td>
<td></td>
<td>Managing chapter members</td>
</tr>
<tr>
<td>Attaching documents to activities</td>
<td></td>
<td>Reports</td>
</tr>
<tr>
<td>Using the Activity Importer</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Customer communication options
- Importing activities
- Committee & Chapter management

Delivery:
- At your desk

Duration:
- 2 hours
- See training schedule

Target Audience:
- This course is designed for:
  - Experienced users

Course objectives:
- Attendees will obtain a good working knowledge of:
  - Customer communications
  - Chapter & Committee management
  - Reporting

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
- training@advsol.com
- www.advsol.com/training
Customer Management for End Users

This on-line workshop is the first in a series on Customer management. It introduces the user to the Customer module and includes navigation, search options, creating new records, activities, generating single merge letters and tracking customer demographics.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Finding, entering and updating customer records
- Managing customer details
- Managing customer history
- Managing tab preferences

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Customers (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Find a record</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Enter a new member</td>
</tr>
<tr>
<td></td>
<td>Searching</td>
<td>Enter a new company</td>
</tr>
<tr>
<td></td>
<td>Entering members</td>
<td>Update a customer</td>
</tr>
<tr>
<td></td>
<td>Entering companies</td>
<td>Create a call activity</td>
</tr>
<tr>
<td></td>
<td>Entering details</td>
<td>Update a call activity</td>
</tr>
<tr>
<td></td>
<td>Viewing history</td>
<td>Attach files to an activity</td>
</tr>
<tr>
<td></td>
<td>Managing call activity</td>
<td>Manage tab preferences</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Customer details
Customer history
Managing activities

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs a refresher in customer management

Course objectives:
Attendees will obtain a good working knowledge of:
- Searching
- Managing customer details
- Managing customer history

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Events Management

This on-line workshop is the third in a series of three on Event management. It introduces the user to the basics of Event management, use of optional modules such as Hotel and Speakers, running reports and more.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Events administration
- Web Event setup wizard
- Speaker evaluation
- Hotel room block management
- Reports

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Events (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Create a new class</td>
</tr>
<tr>
<td></td>
<td>Registration classes</td>
<td>Web setup wizard</td>
</tr>
<tr>
<td></td>
<td>Standard resources</td>
<td>Register for an event</td>
</tr>
<tr>
<td></td>
<td>Accounting</td>
<td>Produce confirmations</td>
</tr>
<tr>
<td></td>
<td>Web setup wizard</td>
<td>Produce a roster</td>
</tr>
<tr>
<td></td>
<td>Reports</td>
<td>Run the Meeting Status report</td>
</tr>
<tr>
<td></td>
<td>Speaker evaluation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hotel room block management</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Event registrations on the web
Reports and rosters
Speaker evaluation
Hotel room block management

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs a refresher in event management

Course objectives:
Attendees will obtain a good working knowledge of:
- Events set up
- Additional modules
- Reporting

Pre-requisites:
- Basic knowledge, such as completing the IMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Events Set up

This on-line workshop is the second in a series of three on Event management. It introduces the user to the basics of Event set up, including creating new events, functions, CEUs, planning and more.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Event and function maintenance
- Event planning
- CEUs

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Events (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Define an event</td>
</tr>
<tr>
<td></td>
<td>Event definition</td>
<td>Define event functions</td>
</tr>
<tr>
<td></td>
<td>Function definition</td>
<td></td>
</tr>
<tr>
<td></td>
<td>General/Validation tables</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Basic setup</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wait lists</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Advanced features</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Defining events
- Defining functions
- Basic and advanced set up

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs a refresher in event management

Course objectives:
Attendees will obtain a good working knowledge of:
- Events set up

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Events for End Users

This on-line workshop is the first in a series of three on Event management. It introduces the user to the Event registrations, processing badges, confirmation letters, cancel/transfer and more.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Finding, entering and updating event registrations
- Reports and rosters
- Wait lists

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Events (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Register a contact</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Send a confirmation letter</td>
</tr>
<tr>
<td></td>
<td>Registration processing</td>
<td>Find an event registration</td>
</tr>
<tr>
<td></td>
<td>Reports and Rosters</td>
<td>Record an event payment</td>
</tr>
<tr>
<td></td>
<td>Account information</td>
<td>Cancel a registration</td>
</tr>
<tr>
<td></td>
<td>Transferring</td>
<td>Reporting</td>
</tr>
<tr>
<td></td>
<td>Managing Wait Lists</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Event registrations
- Reports and rosters
- Account information

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs a refresher in event management

Course objectives:
Attendees will obtain a good working knowledge of:
- Registering for an event
- Reporting

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
iDashboards

This on-line workshop covers the technical aspects of iDashboards as well as the aesthetics of designing exciting charts with the elegant tools of this product. iMIS data is used throughout the class and you will walk away with more than two dozen working charts for iMIS installations.

This workshop combines lecture, hand-outs, and labs with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Dashboard and chart design
- System administration portal
- Linking to data sources
- Drill-down charts and maps

Course Syllabus

<table>
<thead>
<tr>
<th>Session</th>
<th>Installing iDashboards (2 hours)</th>
<th>Charts and Dashboards (2 hours)</th>
<th>More on Charts &amp; Working with Customers (2 hours)</th>
</tr>
</thead>
</table>
| Session 1 | • Overview  
• Installing  
• Documentation  
• Admin interface | • Creating users  
• Importing starter kit  
• Adding a category | • Drill-down charts  
• Map sets  
• Importing |
| Session 2 | • Dashboards  
• Charts  
• Story boarding  
• Data sources | • Modifying chart properties  
• Creating dashboards  
• Requiring stored procedures  
• Rec Requiring a view | • Dashboard Levels  
• Key performance indicators  
• Translating KPI’s to |

Summary

Outline topics:
- Designing dashboards and charts
- Drill-down charts
- Maps

Delivery:
At your desk

Duration:
2 hours x 3 sessions (6 hours)
See training schedule

Target Audience:
This course is designed for:
- The admin user creating dashboards for their organization

Course objectives:
Attendees will obtain a good working knowledge of:
- Dashboards
- Charts

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to iMIS SDK (iParts, SOA and iBO)

This intensive, face paced on-line workshop will introduce you to the concepts of the iParts, iMIS SOA and iBO for .NET.

Designed for Programmers and Programmers with .NET/C# experience who are looking for a guide and understanding of integration and extending iMIS using various APIs. This online class is very similar in scope to the classroom-based class.

At the end of the workshop, attendees will have an understanding of:
- The basics of the integration and extending iMIS
- iParts, iBO for .NET and iMIS SOA
- Creating iParts with iMIS RISE themes
- Extending the SDK further with iBO for .NET

Course Syllabus

<table>
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<tr>
<th>Session</th>
<th>General SDK Review (2 hours)</th>
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<td>Overview iParts, SOA and iBO</td>
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<tr>
<td></td>
<td>Class Development Environment</td>
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<td></td>
<td>Security</td>
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<td></td>
<td>Customers</td>
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</table>

<table>
<thead>
<tr>
<th>Session 2</th>
<th>SDK Review (2 hours)</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>User Defined Tables</td>
</tr>
<tr>
<td></td>
<td>Batches</td>
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<td></td>
<td>Events</td>
</tr>
<tr>
<td></td>
<td>Event Registrations</td>
</tr>
<tr>
<td></td>
<td>Orders – Inventory</td>
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<td></td>
<td>List Products</td>
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</table>

<table>
<thead>
<tr>
<th>Session 3</th>
<th>SDK and iMIS RISE Themes (2 hours)</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Events (Events, Registration)</td>
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<tr>
<td></td>
<td>Orders (Products, Order)</td>
</tr>
<tr>
<td></td>
<td>Dues (Billing, Paying)</td>
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<tr>
<td></td>
<td>iMIS RISE foundation and themes</td>
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<td></td>
<td>Customizing themes</td>
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<td></td>
<td>Membership web service</td>
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</table>

<table>
<thead>
<tr>
<th>Session 4</th>
<th>Putting it all together – iParts (2 hours)</th>
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</thead>
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<td>Quality service</td>
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<td>Sitemap web service</td>
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<td>Logging web service</td>
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<td></td>
<td>WFC web service</td>
</tr>
<tr>
<td></td>
<td>Theories and rules for iParts</td>
</tr>
<tr>
<td></td>
<td>Simple and complex iParts</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- iParts
- iMIS SOA
- iBO for .NET

Delivery:
At your desk

Duration:
2 hours x 4 sessions (8 hours)
See training schedule

Target Audience:
This course is designed for:
- Programmers
- .NET/C# programmers

Course objectives:
This class will teach you the basics of integration and extending iMIS using our various APIs.

Pre-requisites:
An understanding of core iMIS Modules and .NET/C# programming experience are required.

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to Applications Manager for iMIS

This on-line workshop will get you up and running with Applications Manager for iMIS. Presented as two 2 hour sessions via web conference and remote-desktop to your own Virtual Machine, this class will teach you the basics of Data Submission Automation using Applications Manager for iMIS.

The class will include the concepts of applications, question banks, and reviewing. Hands-on examples of membership and grant applications will be provided.

Course Syllabus

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<tr>
<th>Workshop 1</th>
<th>Getting Started (2 hours)</th>
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<td>Key Concepts</td>
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<tr>
<td></td>
<td>Getting around AMS</td>
</tr>
<tr>
<td></td>
<td>Examples of application types</td>
</tr>
<tr>
<td></td>
<td>Online Application Process</td>
</tr>
<tr>
<td></td>
<td>Administrators Module</td>
</tr>
<tr>
<td></td>
<td>Membership Applications</td>
</tr>
<tr>
<td></td>
<td>Review Concepts</td>
</tr>
<tr>
<td></td>
<td>Question Types Module</td>
</tr>
<tr>
<td></td>
<td>Review Sample Application</td>
</tr>
<tr>
<td></td>
<td>Email Types Modules</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workshop 2</th>
<th>Core Concepts (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Question Bank Module</td>
</tr>
<tr>
<td></td>
<td>We will be creating questions based on our sample application.</td>
</tr>
<tr>
<td></td>
<td>Applications Types Modules</td>
</tr>
<tr>
<td></td>
<td>Reviewing process</td>
</tr>
<tr>
<td></td>
<td>Applications Module</td>
</tr>
<tr>
<td></td>
<td>Create a new application based on the sample application.</td>
</tr>
<tr>
<td></td>
<td>Applications Member Groups Module</td>
</tr>
<tr>
<td></td>
<td>Submissions Manager</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Concepts of Applications, Question Banks, Reviewing iMIS examples

Delivery:
At your desk
Two monitors highly recommended - one for instruction, one for your training machine.

Duration:
2 hours x 2 sessions (4 hours)
See training schedule

Target Audience:
This course is designed for:
- Member Services
- Grants Administrators
- Database Administrators
- IT and Report Design staff

Course objectives:
Attendees will obtain a good working knowledge of:
- Data Submission Automation
- Applications Manager tools

Pre-requisites:
- Basic iMIS knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to iQA

This on-line workshop covers the basics of creating, editing and running a query. You will learn how to perform simple joins, apply filters and work in both basic and advanced mode.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Running and editing queries
- Creating basic queries
- Applying filters and sort orders
- Creating a simple join

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>iQA Basics (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Create a query</td>
</tr>
<tr>
<td></td>
<td>Document system</td>
<td>Adding sorts</td>
</tr>
<tr>
<td></td>
<td>Simple queries</td>
<td>Prompting at run time</td>
</tr>
<tr>
<td></td>
<td>Modes</td>
<td>Multi-selects</td>
</tr>
<tr>
<td></td>
<td>Security</td>
<td>Filters</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Joins</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Basic query creation
Simple joins

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- Anyone who needs simple access to iMIS data for reporting

Course objectives:
Attendees will obtain a good working knowledge of:
- Document system
- iQA uses

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to Process Manager

This online work shop outlines using Process Manager as a workflow management tool that allows you to build and define templates that include tasks and procedural steps for a particular project or business process.

This workshop combines lecture and hand-outs, with time for discussion.

At the end of the class, attendees will have an understanding of:

- Module set up requirements
- Practical business applications

Course Syllabus

<table>
<thead>
<tr>
<th>Session 1</th>
<th>Understanding Process Manager (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session 2</th>
<th>Using Process Manager (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Review</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Understanding topics:
Using Process Manager

Delivery:
At your desk

Duration:
4 hours
See training schedule

Target Audience:
This course is designed for:
- Marketing managers
- Fundraisers
- Intermediate users of iMIS Process Manager

Course objectives:
Attendees will obtain a good working knowledge of iMIS Process Manager with particular regard to:
- Set up and table maintenance
- Management
- Ongoing administration
- Reporting

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to SQL Server Reporting Services (SSRS) with iMIS

This online workshop gives you the skills and resources you need to use SSRS to present data from your iMIS database. You will learn how to use SSRS to connect to your database and write reports from a variety of business areas. This workshop combines lecture, hand-outs, and hands on labs with time for questions. Each attendee will have their own image on which to work.

At the end of the class, attendees will have an understanding of:
- ODBC database connectivity technology
- Visual Studio
- iMIS data structure
- Data sources
- Report formatting

Course Syllabus

<table>
<thead>
<tr>
<th>Session 1</th>
<th>Introduction to SSRS Reporting (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
</tr>
<tr>
<td></td>
<td>Using Visual Studio</td>
</tr>
<tr>
<td></td>
<td>Creating a new project</td>
</tr>
<tr>
<td></td>
<td>Adding reports to iMIS</td>
</tr>
<tr>
<td></td>
<td>Navigating your project</td>
</tr>
<tr>
<td></td>
<td>Creating a basic report</td>
</tr>
<tr>
<td></td>
<td>Formatting a report</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session 2</th>
<th>Building an SSRS Report (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Review</td>
</tr>
<tr>
<td></td>
<td>Modifying a datasource</td>
</tr>
<tr>
<td></td>
<td>Renaming fields</td>
</tr>
<tr>
<td></td>
<td>Reformating fields</td>
</tr>
<tr>
<td></td>
<td>Grouping your data</td>
</tr>
<tr>
<td></td>
<td>Adding summary fields</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
SQL Server Reporting Services (SSRS)

Delivery:
At your desk

Duration:
4 hours
See training schedule

Target Audience:
This course is designed for:
- Report writers
- Data owners
- Intermediate/advanced users of iMIS

Course objectives:
Attendees will obtain a good working knowledge of SSRS particular regard to:
- Using Visual Studio
- Configuring iMIS as a data source
- Creating reports
- Formatting reports for presentation
- Adding reports into iMIS

Pre-requisites:
- Basic knowledge of iMIS data would help

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to iMIS TaskCentre

This on-line workshop will get you up and running with iMIS TaskCentre. Presented as three 2 hour sessions via web conference and remote-desktop to your own Virtual Machine, this class will teach you the basics of Business Process Management using iMIS TaskCentre. The class will include the steps to install TaskCentre, introduction to the concepts of tasks, steps and TaskCentre tools.

Course Syllabus

<table>
<thead>
<tr>
<th>Workshop 1</th>
<th>Getting Started (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Installation</td>
</tr>
<tr>
<td></td>
<td>Basic Configuration</td>
</tr>
<tr>
<td></td>
<td>Concepts</td>
</tr>
<tr>
<td></td>
<td>Creating a Task</td>
</tr>
<tr>
<td></td>
<td>Your first task</td>
</tr>
<tr>
<td></td>
<td>Database Querying</td>
</tr>
<tr>
<td></td>
<td>Format Text</td>
</tr>
<tr>
<td></td>
<td>Send a message</td>
</tr>
<tr>
<td></td>
<td>Scheduling Tasks</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workshop 2</th>
<th>Tasks Working with iMIS (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Request follow-up to call by remote volunteer Using projects</td>
</tr>
<tr>
<td></td>
<td>Send and reply: Recording follow-up in Activity record</td>
</tr>
<tr>
<td></td>
<td>Distribute Electronic Products –</td>
</tr>
<tr>
<td></td>
<td>Activity Types treated different ways</td>
</tr>
<tr>
<td></td>
<td>MSSQL Trigger, Database Query, Send Message (SMTP)</td>
</tr>
<tr>
<td></td>
<td>SMTP (Listener), Text Parse, Call Procedure</td>
</tr>
<tr>
<td></td>
<td>MSSQL Trigger, Database Query, Send Message (SMTP) with Attachment</td>
</tr>
<tr>
<td></td>
<td>MSSQL Trigger, two Database Queries (note use of iMIS Business object views), Decision Tool, four branches to different Send Message (SMTP) outputs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workshop 3</th>
<th>More Elaborate Tasks with iMIS (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Order Fulfilment File Transfer –</td>
</tr>
<tr>
<td></td>
<td>Process record change converts prospect to member, sends invoice</td>
</tr>
<tr>
<td></td>
<td>Weekly Membership Report –</td>
</tr>
<tr>
<td></td>
<td>Word Merge from iMIS Data</td>
</tr>
<tr>
<td></td>
<td>Scheduler, Query, Format as Text, VBScript, Save as File, File Transfer</td>
</tr>
<tr>
<td></td>
<td>Trigger, Queries(2), Format as HTML, Email Invoice, Bill Dues, Create HTML</td>
</tr>
<tr>
<td></td>
<td>Schedule, Run Crystal Report, Save as File, Email Report</td>
</tr>
<tr>
<td></td>
<td>Query, Word Merge, Email</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Installation
- Configuration
- Concepts of Tasks and Steps
- iMIS examples

Delivery:
At your desk
Two monitors highly recommended - one for instruction, one for your training machine.

Duration:
2 hours x 3 sessions (6 hours)
See training schedule

Target Audience:
This course is designed for:
- Database Administrators
- IT and Report Design staff

Course objectives:
Attendees will obtain a good working knowledge of:
- Business Process Automation
- TaskCentre tools

Pre-requisites:
- Basic iMIS knowledge, such as completing the iMIS Overview class
- Basic knowledge of SQL concepts, triggers and stored procedures and scripting

Pricing and more info:
training@advsol.com
www.advsol.com/training
Introduction to WebFormz for iMIS

This on-line workshop will get you up and running with WebFormZ for iMIS. Presented as two 2 hour sessions via web conference and remote-desktop to your own Virtual Machine, this class will teach you the basics of building forms using WebFormZ for iMIS.

The class will include the concepts of forms, questions, rules, submission and much more. Hands-on examples of building a registration form and publishing it to your website will be provided.

What you’ll learn
- WebFormZ key concepts and configuration
- Adding questions and rules to a form
- Pre-populate questions
- Write data back to iMIS on form submission
- Build and publish a form to your website
- Submit a form and run a report to view submissions

Course Syllabus

<table>
<thead>
<tr>
<th>Workshop 1</th>
<th>Getting Started (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Concepts</td>
<td>Create Questions</td>
</tr>
<tr>
<td>Getting around WebFormZ</td>
<td>Configure question rules</td>
</tr>
<tr>
<td>Examples of forms</td>
<td>Create Validation rules</td>
</tr>
<tr>
<td>Review setup screens</td>
<td>Email Templates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Workshop 2</th>
<th>Core Concepts (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review sample form</td>
<td>User access permissions</td>
</tr>
<tr>
<td>Build sample form</td>
<td>Submission of a form</td>
</tr>
<tr>
<td>WebFormZ iMIS integration</td>
<td>Review submissions</td>
</tr>
<tr>
<td>Publish form to website</td>
<td>Debugging errors</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Concepts of Forms, Questions, Rules and Submission

Delivery:
At your desk
Two monitors highly recommended - one for instruction, one for your training machine.

Duration:
2 hours x 2 sessions (4 hours)
See training schedule

Target Audience:
This course is designed for:
- Member Services
- Grants Administrators
- Database Administrators
- IT and Report Design staff

Course objectives:
Attendees will obtain a good working knowledge of:
- Using the WebFormZ product
- Building forms and publishing them to your website

Pre-requisites:
- Basic iMIS knowledge, such as completing the iMIS Overview class
Orders - Inventory Management

This on-line workshop is the second in a series of three on Order management. It covers inventory management to include processing, inventory, backorders and reporting.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Managing inventory
- Reporting

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Orders (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Close a completed order</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Define a product kit</td>
</tr>
<tr>
<td></td>
<td>Order processing</td>
<td>Define a new warehouse</td>
</tr>
<tr>
<td></td>
<td>Product management</td>
<td>Work with inventory receipts</td>
</tr>
<tr>
<td></td>
<td>Product inventory</td>
<td>Release a backorder</td>
</tr>
<tr>
<td></td>
<td>Backorders</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Order processing

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs a refresher in order management

Course objectives:
Attendees will obtain a good working knowledge of:
- Managing an order

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Orders for Managers

This on-line workshop is the third in a series of three on Order management. It covers required tables and module setup as well as importing orders.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Product maintenance
- Order administration

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Orders (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Define a product category</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Define a shipping zone</td>
</tr>
<tr>
<td></td>
<td>Orders table maintenance</td>
<td>Define add-on charges</td>
</tr>
<tr>
<td></td>
<td>Freight charge calculations</td>
<td>Create an import file</td>
</tr>
<tr>
<td></td>
<td>Set up module</td>
<td>Import an order file</td>
</tr>
<tr>
<td></td>
<td>Reporting</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Order processing set up
Order importing

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- Managers

Course objectives:
Attendees will obtain a good working knowledge of:
- Table maintenance
- Module set up

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Orders for End Users

This on-line workshop is the first in a series of three on Order management. It introduces the user to the Order types, entering orders and using up-see/cross-sell.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Finding, entering and updating orders
- Using up-sell/cross-sell

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Orders (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview</td>
<td>Enter an order</td>
</tr>
<tr>
<td></td>
<td>Navigation</td>
<td>Enter a prepayment</td>
</tr>
<tr>
<td></td>
<td>Order entry</td>
<td>Enter a post invoice payment</td>
</tr>
<tr>
<td></td>
<td>Defining products</td>
<td>Add a product to an order</td>
</tr>
<tr>
<td></td>
<td>Designate Upsell, Cross-sell and Replacement items for products</td>
<td>Cancel an order with a credit card</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Order processing

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- New users in the department
- Temps
- Anyone who needs a refresher in order management

Course objectives:
Attendees will obtain a good working knowledge of:
- Entering an order

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
System Administrator –
Upgrades & Configuration

This on-line workshop is the first in a series of three for system administrators that covers iMIS upgrades and configuration.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of:

- Location of iMIS components
- Where to start configuring iMIS
- Output processes

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Security, Customizer &amp; Maintenance (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Resources</td>
<td>Upgrade iMIS</td>
</tr>
<tr>
<td></td>
<td>New installs and upgrades</td>
<td>Enter a new record</td>
</tr>
<tr>
<td></td>
<td>Pre-reqs for an install</td>
<td>Enter a new value in a table</td>
</tr>
<tr>
<td></td>
<td>Architecture scenarios</td>
<td>Change the search display results</td>
</tr>
<tr>
<td></td>
<td>System requirements</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The views of iMIS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Upgrade considerations</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Installing and upgrade iMIS

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- System administrators

Course objectives:
Attendees will obtain a good working knowledge of:
- Installing and upgrading
- Location of components
- How to start configuring

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
System Administrator – Tailoring, Security and Maintenance

This on-line workshop is the second in a series of three for system administrators that covers iMISCustomizer, Security and Database Maintenance.

This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion.

At the end of the class, attendees will have an understanding of

- Using customizer
- User security
- Upgrade and repair tools

Course Syllabus

<table>
<thead>
<tr>
<th>At Your Desk</th>
<th>Security, Customizer &amp; Maintenance (1 hour)</th>
<th>How to... (1 hour)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Resources, Tailoring iMIS, Security, Maintenance and tools</td>
<td>Create a new table, Add a validation table, Add a field to the public view, Create a new user, Database upgrader, DBRepair, Multi-Instance Utility</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Tailoring iMIS
Security
Maintenance and Tools

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- System administrators

Course objectives:
Attendees will obtain a good working knowledge of:
- User security
- Upgrade and repair tools

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS RiSE for Content Managers

This on-line workshop introduces you to the basics of site management, navigation and creating content in iMIS RiSE and especially the power of iParts.

If you are charged with building more dynamic interactive content for your organization this introduces you to the iPart concepts for content management, iMISstyle. Use simple and complex modular iParts to build pages from a simple HTML page to full motion video.

This workshop combines lecture, hand-outs and labs. Get hands-on experience in putting together your own content pages, with time for lab completion and discussion.

This on-line workshop covers the everyday basics of creating content in iMIS RiSE.

At the end of the class, attendees will have an understanding of:
- Creating content, both HTML and Dynamic using iParts
- Making the dynamic connection to iMIS via iParts
- Create structure with Site Designer

Course Syllabus

<table>
<thead>
<tr>
<th>iMIS RiSE for web site builders and managers (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Overview</td>
</tr>
<tr>
<td>- Creating content using iParts</td>
</tr>
<tr>
<td>- Build and manage navigation</td>
</tr>
<tr>
<td>- Connect to iMIS using dynamic iParts</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Create Site Structure
Create HTML Content
Build using iParts

Delivery:
At your desk

Duration:
2 hours
See training schedule

Target Audience:
This course is designed for:
- The user creating and maintaining content via iMIS RiSE

Course objectives:
Attendees will obtain a good working knowledge of:
- Site map management
- Creating Content
- Using iParts

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS RiSE Configuration and Administration

This on-line workshop will get you up and running with iMIS RiSE by teaching you the basics of administering the module. This workshop combines lecture, hand-outs and labs, with time for lab completion and discussion. Each student can work through labs on a live student image.

At the end of the class, attendees will have an understanding of:
- Creating a web site using the iMIS member reference site as a base.
- Building HTML content and tagging records
- Building dynamic iPart layouts for the iMIS connection.
- Securing content

Course Syllabus

<table>
<thead>
<tr>
<th>Session 1</th>
<th>Basic iMIS RiSE (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Building HTML content iPart</td>
</tr>
<tr>
<td>Creating a website</td>
<td>Site designer features</td>
</tr>
<tr>
<td>Templates and themes</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session 2</th>
<th>Advanced iMIS RiSE tagging, templates &amp; security (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tagging</td>
<td>Security</td>
</tr>
<tr>
<td>UD content fields</td>
<td>Web Content Layouts</td>
</tr>
<tr>
<td>Tagged lists</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session 3</th>
<th>Using iMIS RiSE, iQA and iParts together (2 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High level configuration</td>
<td>iQA and Query Menu iPart</td>
</tr>
<tr>
<td>User data and Panel Editor</td>
<td>iParts Concepts</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Essentials for using iMIS RiSE
- Creating Sites
- Security and Navigation
- Content as an iPart

Delivery:
At your desk

Duration:
2 hours x 3 sessions (6 hours)
See training schedule

Target Audience:
This course is designed for:
- The individual creating and maintaining their iMIS web sites

Course objectives:
Attendees will obtain a good working knowledge of:
- iMIS RiSE site creating and design
- User centric design with dynamic iParts
- Security

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
Crystal Reports for iMIS

This two-day course is designed for beginner to intermediate Seagate Crystal Reports users who need to quickly become proficient in creating and modifying reports.

This course combines slides, demonstrations, discussion and hand-on practice. All examples and labs in this course use the iMIS demonstration database, so you can learn in an iMIS environment.

At the end of this workshop, attendees will have learned and practiced:

- Creating a standard report
- Reviewing the Report Design window
- Record selection to include sorting, grouping and summarizing
- Table linking

Course Syllabus

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Creating a report</th>
<th>Selecting and organizing records</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Choosing a report type</td>
<td>Using the select expert</td>
</tr>
<tr>
<td></td>
<td>Choosing a data source</td>
<td>Sorting records</td>
</tr>
<tr>
<td></td>
<td>Joining your tables</td>
<td>Grouping records</td>
</tr>
<tr>
<td></td>
<td>Choosing your fields</td>
<td>Summarizing records</td>
</tr>
<tr>
<td></td>
<td>Displaying/printing your report</td>
<td>Linking tables</td>
</tr>
<tr>
<td></td>
<td>Using Report Design Interface</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Presentation Quality Reports</th>
<th>Distribution &amp; References</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Inserting special fields</td>
<td>Report distribution</td>
</tr>
<tr>
<td></td>
<td>Inserting lines and boxes</td>
<td>Tips and Tricks</td>
</tr>
<tr>
<td></td>
<td>Inserting a picture</td>
<td>Troubleshooting</td>
</tr>
<tr>
<td></td>
<td>Using parameter fields</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Overview
- Report creation
- Record selection
- Presentation Quality reports
- Formula basics
- Parameter fields

Delivery:
Face to face

Duration:
2 days
From 9.00am – 5.00pm

Target Audience:
This course is designed for:
- Users involved in the implementation, support or daily use of Seagate Crystal Reports

Course objectives:
Attendees will acquire a basic working knowledge of the functionality of Seagate Crystal Reports when used with iMIS.

Prerequisites:
- Working knowledge of iMIS
- Basic understanding of tables, fields and records

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS 20 Principles for Partners

This in-depth, intensive, three day class covers the key fundamentals of iMIS 20 - the first Full-Cycle Engagement Management System Empowering Continuous Performance Improvement. Through a hands-on, business case based exploration of out-of-the-box iMIS 20 EMS, you will discover the new full-cycle approach to Engagement Management and see how each element in the course ties directly to the iMIS 20 Value Cycle. We will focus on four main subject areas of critical importance for service providers bringing iMIS 20 to their clients:

1. RiSE – the DNA of iMIS 20
2. Engagement Management
3. Commerce
4. Continuum

This course covers what is new in iMIS 20 and how to effectively use it to improve member/donor engagement and organizational performance including:

- Quick start sites
- Content Gallery
- Public social networks
- Private communities
- Self-Service
- Mobile device access
- Relationships
- and much more

By the end of this class, you will be fully prepared to bring the iMIS 20 Value Cycle to your clients, to understand the direct business value of each of these elements in iMIS 20 and have the practical hands-on experience necessary to make your clients successful with iMIS 20.

The class concludes with a test reviewing your understanding of the approach to full-cycle engagement management with iMIS 20 and the practical elements to make that happen. This class and test are part of the requirements on your journey to becoming a Certified iMIS Professional (see our web site for more details).
# Course Syllabus

<table>
<thead>
<tr>
<th>Day 1</th>
<th>iMIS20 Message &amp; RiSE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Message &amp; Goals</td>
</tr>
<tr>
<td></td>
<td>• RiSE – Web Engagement Platform</td>
</tr>
<tr>
<td></td>
<td>• Page Builder – Tool used for building web pages</td>
</tr>
<tr>
<td></td>
<td>• Site Builder – Tool used for building and managing websites</td>
</tr>
<tr>
<td></td>
<td>• iMISDynamic Content items – flexible, reusable, powerful</td>
</tr>
<tr>
<td></td>
<td>• Content Gallery – holds the iMIS Dynamic Content items</td>
</tr>
<tr>
<td></td>
<td>• Quick Start sites – Ready to go sites and site templates</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Engagement Management</th>
<th>Commerce</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Public social networks – sharing with others to build engagement</td>
<td></td>
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<tr>
<td></td>
<td>• Private communities - where constituents can connect, collaborate, and communicate in a secure trusted setting</td>
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<tr>
<td></td>
<td>• Tagging – dynamically display iMIS content throughout a site</td>
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<tr>
<td></td>
<td>• Join Now – becoming a member of a group</td>
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<tr>
<td></td>
<td>• Events – registering yourself or others for events</td>
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<tr>
<td></td>
<td>• Shopping – setting up the selling and cross selling of products of services</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 3</th>
<th>Commerce</th>
<th>Continuum</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Shopping - purchasing products or services</td>
<td></td>
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<tr>
<td></td>
<td>• Donations - monetary or in-kind contribution that is associated with an iMIS distribution</td>
<td></td>
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<tr>
<td></td>
<td>• Moves Management – cultivating and tracking donors and opportunities</td>
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<tr>
<td></td>
<td>• Dashboards – IQA enabled data visualization</td>
<td></td>
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<td></td>
<td>• Google Analytics – Measurement tools for your business</td>
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<tr>
<td></td>
<td>• Reporting – new toolset for a wide range of tasks</td>
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</tr>
<tr>
<td></td>
<td>• iMIS20 Principles for Partners Test</td>
<td></td>
</tr>
</tbody>
</table>

## Summary

### Class Topics of Focus:
- RiSE
- Engagement Management
- Commerce
- Continuum

### Delivery:
Face to face

### Duration:
3 days (9.00am – 5.00pm)

### Target Audience:
This course is designed for:
- AiSP’s Solution Professionals
- iMIS Consultants

### Prerequisites:
- One or more years iMIS experience

### Attendee Requirement:
Attendees will be required to bring a laptop to the class. We will provide remote training servers with all the software installed, but attendees will need a laptop with Remote Desktop Connection capability in order to access them.

### Pricing:
- Check our website for pricing of public classes
- Contact us to arrange private on-site training

### For course enquiries:
training@advsol.com
www.advsol.com/training
iMIS Fundraising

This two-day workshop covers the setup and functionality of the iMIS Fund Raising module.

This course combines slides, demonstrations, discussion and hands-on practice with a demonstration database and is part of the iMIS Fund Raising Reseller Authorization requirements.

At the end of this workshop, attendees will have learned and practiced:

- Entry and management of fundraising data
- Set up, management and administration of a fundraiser and processing of gifts and pledges

Course Syllabus

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Web component &amp; Overview</th>
<th>Gifts &amp; Pledges</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Donate now!</td>
<td>• Entering gifts &amp; pledges</td>
</tr>
<tr>
<td></td>
<td>• Understanding system capabilities</td>
<td>• Sending customized acknowledgement letters</td>
</tr>
<tr>
<td></td>
<td>• Understanding terms</td>
<td>• Entering payments</td>
</tr>
<tr>
<td></td>
<td>• Understanding integration</td>
<td>• Issuing receipts</td>
</tr>
<tr>
<td></td>
<td>• Using the menu</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Events &amp; Reports</th>
<th>Setup/Table Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Managing meeting as Fundraising events Reporting reports</td>
<td>• Set up of the fundraising module through Customers</td>
</tr>
<tr>
<td></td>
<td>• Implementing security</td>
<td>• Set up of the fundraising module through AR/Cash</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Set up of the fundraising module</td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Gifts and pledges
Rapid gift entry
Payments
Event registrations
Requestions

Delivery:
Face to face

Duration:
2 days
From 9.00am – 5.00pm

Target Audience:
This course is designed for:
- Experienced users and resellers involved in the implementation and support of the Fund Raising module

Course objectives:
Attendees will learn how to create and implement a comprehensive yet scalable system for managing fundraising functions within their organization.

Prerequisites:
- Completion of iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS Implementation

This two-day class covers iMIS for MS SQL implementation with an emphasis on the data conversion process.

This course combines slides, demonstrations, discussion and extensive hands-on practice

At the end of the class, attendees will have an understanding of how to:

- Create an implementation project plan
- Install and configure iMIS
- Map and convert legacy data
- Create customized tables
- Convert data using SQL scripts
- Create and maintain a backup process

Course Syllabus

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Implementation Phases &amp; Data Conversion</th>
<th>Data Conversion &amp; Customized Tables</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Phase I - V</td>
<td>• Candidates for conversion</td>
</tr>
<tr>
<td></td>
<td>• Basic conversion concepts</td>
<td>• Terminology issues</td>
</tr>
<tr>
<td></td>
<td>• Implementation tools</td>
<td>• Mapping the data</td>
</tr>
<tr>
<td></td>
<td>• Reviewing iMIS data components</td>
<td>• Using the IMIS Customizer</td>
</tr>
<tr>
<td></td>
<td>• Reviewing the legacy data</td>
<td>• Implementing Access Keywords</td>
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<tr>
<td>Day 2</td>
<td>Post conversion utilities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Converting data manually</td>
<td>• Creating views</td>
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<tr>
<td></td>
<td>• Converting open AR Balances</td>
<td>• SQL Counter</td>
</tr>
<tr>
<td></td>
<td>• Using Name_Indexes</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
Implementation phases
Data conversion
Post conversion utilities

Delivery:
Face to face

Duration:
2 days
From 9.00am – 5.00pm

Target Audience:
This course is designed for those responsible for the implementation of the iMIS database systems:
- Installers
- Consultants
- System administrators

Course objectives:
Attendees will obtain a good working knowledge of:
- Implementation phases
- Data conversion
- Customized tables and security
- Post conversion utilities

Pre-requisites:
- Basic knowledge, such as completing the iMIS Overview class

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS TaskCentre

This comprehensive two-day class covers how to install and use iMIS TaskCentre the Business Process Automation suite for iMIS.

This training lets you manage business processes, simple and complex. During these two days you will work through over 30 hands-on examples using TaskCentre Tools to create Tasks that provide process automation triggered by changes in iMIS data, incoming email, or schedule tasks that could potentially consume hundreds of hours of staff time and attention to do manually.

At the end of the class, attendees will have an understanding of how:

- to Install and Configure TaskCentre
- the concepts of TaskCentre processes structured by Task and Step
- to build useful tasks built on TaskCentre tools
- to understand the power of TaskCentre to save your organization time and money.

Course Syllabus

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Installation and tools</th>
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</thead>
<tbody>
<tr>
<td>• Installing and Configuration</td>
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<tr>
<td>• Find your way around</td>
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<tr>
<td>• Creating Folders and Tasks</td>
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<tr>
<td>• Database Query Tool</td>
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<td>• Format Text Tool</td>
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<td>• Send Message Tool</td>
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<td>• Schedule Tool</td>
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<td>• Format as HTML</td>
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<td>• Save as File Tool</td>
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<tr>
<td>• File Transfer Tool</td>
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<tr>
<td>• Run Crystal Reports Tool</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Building Tasks using TaskCentre Toolset</th>
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<tbody>
<tr>
<td>• MS SQL Trigger Tool</td>
<td></td>
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<tr>
<td>• SMTP Tool</td>
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<tr>
<td>• Text Parser Tool</td>
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<td>• Call Procedure Tool</td>
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<td>• Decision Tool</td>
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<tr>
<td>• Variables</td>
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<tr>
<td>• Formulas</td>
<td></td>
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<tr>
<td>• Run VB Script Tool</td>
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<tr>
<td>• Memory Tools</td>
<td></td>
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<td>• Data Filter Tool</td>
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<td>• MS Word Merge Tool</td>
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<tr>
<td>• Run Program Tool</td>
<td></td>
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</tbody>
</table>

Summary

Outline topics:
Implementation Concepts – Tasks and Tools Building tasks

Delivery:
Face to face

Duration:
2 days  
From 9.00am – 5.00pm

Target Audience:
This course is designed for:
- Database Administrators

Course objectives:
Attendees will obtain a good working knowledge of:
- TaskCentre Installation and Configuration
- Business Process Automation
- TaskCentre Tools

Pre-requisites:
- Basic iMIS knowledge, such as completing the iMIS Overview class
- Basic knowledge of SQL concepts, triggers and stored procedures and scripting

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS Overview for Associations

This in-depth three-day class covers the core modules of iMIS and is an excellent, fast-paced introduction to iMIS, focusing on extensive hands-on practice, and demonstrations.

Designed for iMIS newcomers, or experienced users seeking to fill gaps in their knowledge of iMIS, it is also appropriate for managers and administrator’s looking for a general all-round understanding of iMIS and its capabilities.

At the end of the overview, attendees will have learned and practiced:

- Entry and management of customer data and communications
- Set up, management and administration of events and processing of registrations
- Set up, management and administration of cash dues billing
- Set up, management and administration of AR Cash

Course Syllabus

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Customers</th>
<th>Customers</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Manage customer data</td>
<td>Committees</td>
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<tr>
<td></td>
<td>Enter and manage detailed data</td>
<td>iMIS Customizer</td>
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<tr>
<td></td>
<td>Manage historical data</td>
<td>Reporting</td>
</tr>
<tr>
<td></td>
<td>Customer communications</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 2</th>
<th>A/R Cash</th>
<th>Billing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AR Module set up</td>
<td>Set up of the billing module</td>
</tr>
<tr>
<td></td>
<td>Batch management</td>
<td>Table maintenance</td>
</tr>
<tr>
<td></td>
<td>AR transactions</td>
<td>Perform cash billing</td>
</tr>
<tr>
<td></td>
<td>Simple order entry</td>
<td>Enter payments for cash dues</td>
</tr>
<tr>
<td></td>
<td>Month end procedures</td>
<td></td>
</tr>
<tr>
<td></td>
<td>AR cash reports</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day 3</th>
<th>Events</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Set up of the events module</td>
<td>Processing registrations</td>
</tr>
<tr>
<td></td>
<td>Defining an event</td>
<td>Managing event resources</td>
</tr>
<tr>
<td></td>
<td>Defining functions</td>
<td>Reporting</td>
</tr>
<tr>
<td></td>
<td>Options for functions</td>
<td></td>
</tr>
</tbody>
</table>

Summary

Outline topics:
- Customers
- Events
- A/R Cash
- Billing
- Customizer

Delivery:
Face to face

Duration:
3 days
From 9.00am – 5.00pm

Target Audience:
This course is designed for:
- Day to day users of iMIS
- Departmental managers & team leaders
- Database administrators

Course objectives:
Attendees will obtain a good working knowledge of the core iMIS modules with particular regard to:
- Set up and table maintenance
- Management
- Ongoing administration
- Reporting

Pre-requisites:
There are no pre-requisites for the iMIS Overview

Pricing and more info:
training@advsol.com
www.advsol.com/training
iMIS Overview for Fundraisers

This in-depth three-day class covers the core modules of iMIS and is an excellent introduction to iMIS, focusing on hands-on practice and demonstrations. The class also includes a workshop focusing on setup and functionality of the Fund Raising module.

Designed for iMIS newcomers, or experienced users seeking to fill gaps in their knowledge of iMIS, it is also appropriate for managers and administrator’s looking for a general all-round understanding of iMIS and its capabilities.

At the end of this class, attendees will have learned and practiced:

- Entry and management of customer data and communications
- Set up, management and administration of events and processing of registrations
- Set up, management and administration of AR Cash
- Entry and management of fundraising data
- Set up, management and administration of a fundraiser and processing of gifts and pledges
- Processing/receiving on-line donations

Summary

Outline topics:
- Customers
- Events
- Accounts Receivable & Cash Receipts
- Fundraising

Delivery:
Face to face

Duration:
3 days
From 9.00am – 5.00pm

Target Audience:
This course is designed for:
- Day to day users of iMIS
- Departmental managers & team leaders
- Database administrators

Course objectives:
Attendees will obtain a good working knowledge of the core iMIS modules with particular regard to:
- Set up and table maintenance
- Managing Customer Records
- Managing Events and Registrations
- Tracking Donations
- Reporting & IQA Queries

Pre-requisites:
There are no pre-requisites for the iMIS Overview

Pricing and more info:
training@advsol.com
www.advsol.com/training
<table>
<thead>
<tr>
<th><strong>Day One</strong></th>
<th><strong>Customers</strong></th>
<th><strong>Day Two</strong></th>
<th><strong>A/R Cash and Events</strong></th>
<th><strong>Day Three</strong></th>
<th><strong>Fundraising Workshop</strong></th>
</tr>
</thead>
</table>
| **Morning** | • Customers Introduction  
• Finding Records  
• Creating Records  
• Adhoc Searches with Reporting  
• Activity Ticklers  
• Labs  
• Merge Letters  
• Managing Relationships | **Afternoon** | • Activity Attachments  
• IQA  
• Standard Reporting  
• Labs  
• Committees  
• Committee Reporting | **Morning** | • AR Cash Introduction  
• Module Setup  
• Financial Transactions  
• Labs  
• Batch Reconciliation  
• Month-End Procedures  
| **Afternoon** | | • Events Introduction  
• Define Events & Functions  
• Processing Registrations  
• Labs  
• Reporting  
• After Event Processing | • Preparing the Fundraising module  
• Create Funds, Campaigns, Appeals & Distributions  
• Donor Clubs  
• Gifts and Pledges  
• Instalments & Payments  
• Memorials & Tributes Issuing receipts | **Afternoon** | • Acknowledgement Letters  
• Reporting  
• Matching Gifts  
• Meeting Registrations as Gifts  
• Labs  
• Mid-Afternoon break  
• Receipting  
• Reporting  
• Fundraising History thru Customers  
• Donate Now! (Online Donations) |
**iMIS SDK (iParts, SOA and iBO) Programming**

This 2 day on-site course will introduce you to the concepts of the iMIS SDK, which includes iBO for .NET, iMIS SOA and iParts. This series is a programmer's introduction to the iMIS SDK, and students are expected to have .NET/C# programming experience.

Designed for Programmers and Programmers with .NET/C# Experience who are looking for a guide and understanding of integration and extending iMIS using various APIs.

At the end of the workshop, attendees will have learned and practiced:

- The basics of the integration and extending iMIS
- General SDK and iBO for .NET
- iBO and iMIS RiSE themes
- SOA
- Putting it all together with iParts

**Course Syllabus**

<table>
<thead>
<tr>
<th>Day One</th>
<th>General SDK and iBO for .NET</th>
<th>General SDK and iBO for .NET</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overview iBO, SOA, and iParts</td>
<td>User Defined Tables</td>
</tr>
<tr>
<td></td>
<td>Class Development</td>
<td>Batches</td>
</tr>
<tr>
<td></td>
<td>Environment</td>
<td>Events</td>
</tr>
<tr>
<td></td>
<td>iBO Practical sessions</td>
<td>Event Registrations</td>
</tr>
<tr>
<td></td>
<td>Create your iBO sandbox</td>
<td>Orders - Inventory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>List Products</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day Two</th>
<th>iBO and iMIS RiSE themes</th>
<th>SOA and putting it all together with iParts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>iBO Practical sessions</td>
<td>Membership web service</td>
</tr>
<tr>
<td></td>
<td>Events (Events, Registration)</td>
<td>Query service</td>
</tr>
<tr>
<td></td>
<td>Orders (Products, Order)</td>
<td>Sitemap web service</td>
</tr>
<tr>
<td></td>
<td>Dues (Billing, Paying)</td>
<td>Logging web service</td>
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<tr>
<td></td>
<td>iMIS RiSE foundation and templates</td>
<td>Main SOA service host</td>
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<tr>
<td></td>
<td>Customizing templates</td>
<td>Theories and rules for creating iParts</td>
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</tbody>
</table>

**Summary**

Outline topics:
- iParts
- iMIS SOA
- iBO for .NET

**Delivery:**
Face to face

**Duration:**
2 days
From 9.00am – 5.00pm

**Target Audience:**
This course is designed for:
- Programmers
- .NET/C# Programming Experience

**Course objectives:**
This class will teach you the basics of the integration and extending iMIS using our various APIs.

**Pre-requisites:**
An understanding of core iMISModules
.NET/C# programming experience

**Pricing and more info:**
training@advsol.com
www.advsol.com/training
iMIS RiSE

This in-depth two-day course will give participants the background and knowledge to implement and configure iMIS RiSE for different types of websites.

Designed for Website Administrators, IT Staff and users who enter web content, with experienced and knowledge of iMIS who are looking for a guide and understanding of maintaining iMIS RiSE.

At the end of the overview, attendees will have learned and practiced:

- Participants will install iMIS
- Create new websites
- Gain a thorough understanding of content types
- Tagging and Security
- Extend iMIS through the concept of web parts

Course Syllabus

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<th>Day One</th>
<th>Overview iMIS RiSE</th>
<th>Setup iMIS RiSE</th>
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<td>• Overview of iMIS and Positioning of the Product</td>
<td>• Web design and the components of an iMIS website</td>
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<td>• Project Planning</td>
<td>• iMIS Installer</td>
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<td>• Information Architecture</td>
<td>• Site Designer</td>
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<td>• Content Designer</td>
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<thead>
<tr>
<th>Day Two</th>
<th>Setup iMIS RiSE (cont)</th>
<th>Maintenance/Security</th>
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<td>• Security</td>
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<td>• Publishing Servers and Publishing Services</td>
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</tbody>
</table>

Summary

Outline topics:
- Overview of iMIS RiSE
- Installation
- iMIS RiSE

Delivery:
- Face to face

Duration:
- 2 days
  - From 9.00am – 5.00pm

Target Audience:
- This course is designed for:
  - Website administrators
  - IT Staff
  - Users who enter content

Course objectives:
- Attendees will obtain a good working knowledge of iMIS RiSE with particular regard to:
  - Installation, Configuration and Administration of iMIS RiSE

Pre-requisites:
- Participants must have a good knowledge of iMIS Core Modules

Pricing and more info:
- training@advsol.com
- www.advsol.com/training