

Zephyr Consulting

iMIS Glossary



SUPPORTING YOU
**EVERY STEP
OF THE WAY**

GLOSSARY

Activity

An iMIS record of a predefined type of interaction with a customer. For example, a cash donation generates a GIFT activity, conference attendance generates a MEETING activity, a solicitation generates a REQUEST activity.

Authenticated user

A user who has logged in

Batch

A group or collection of transactions of the same general type, identified by a unique name or number. The transactions might be batched together by date or by other parameters.

Bill Begin

Projected begin date for an individual dues or subscription product. Refers to the first date of a term through which the item has been billed, whether or not payment has been received.

Bill to ID

Refers to whomever is responsible for paying the registrant's event fees. This might be the registrant or, as in many cases, a third party such as the registrant's company or employer. When a Bill to ID party is identified, all accounting and invoice transactions are tracked under the Bill to ID. However, all participation history continues to be tracked under the individual registrant's ID (if represented in the customer database).

Billing cycle

A defined billing run set up to bill a particular group of people for a particular set of products.

Breadcrumb

Text showing the sitemap of a visited page that appears automatically on every site. These navigation areas must be enabled globally in the website's sitemap.

Business object

A collection of self-contained data that represents an entity or process and shields the physical data.

Business object designer

An administrative tool for viewing, editing, and creating iMIS business objects that provides a graphical user interface to the properties related to business objects.

Cash accounting

The system of accounting in which income is recognised when the payment is received for an invoice.

Company flow down

A way to join customers through the organisation ID. You can flow down data such as address, phone, and so forth, from the organisation ID to the customer record joined by the organisation ID.

Contact status

Method to indicate standing within the organisation for specific actions, communications, and workflows. Includes the following defaults:

- A – Active
- S – Suspended
- I – Inactive
- D – Mark for Deletion

Content

- Core Content – Standard, out-of-the-box pages which provide core functionality and are generally shared across multiple websites.
- Shared Content – Pages shared across multiple websites so layout and content changes can be made in one place.
- Website-specific content – Pages that are designed specifically for the needs of a single website (can still be shared with others).

Content items

The unique components of core iMIS functionality that can be placed together on a content page. They are flexible, re-usable and powerful. Most core iMIS functionality is available as content items.

Content layout

An iMIS definition object that contains information for how the content zones of a content page will be arranged. A content layout defines only the arrangement of elements that will be displayed for a content page within the main content area. A content layout does not define the overall layout of the website, which is defined by the site's master page.

Content Management System

A software application that manages digital assets, typically web content. iMIS is the only software product for associations with a built-in CMS, called RiSE, so business system and websites come from the same source with countless benefits.

Content page

An iMIS definition object that contains the content layout information and content items needed to render a web page.

Continuous Performance Improvement Machine

A software system that automatically advances an organisation towards achieving its goals, operating with the efficiency of a Machine.

Continuum

The reporting system for iMIS. Can be accessed through the Staff site.

Customer type

Categories of membership that define the membership levels and amount charged for membership, or dues and subscriptions.



Dashboard

The landing page for each of the main navigation areas of the staff site. It provides a quick view of important, up-to-date association contact and membership figures. This information-management tool visually tracks, analyses and automatically displays key performance indicators (KPIs), metrics, and important data points to monitor the health of an organisation, department or specific process. Typically, dashboards can be tailored easily to meet specific needs

Database

An interactive collection of related information that is organised into meaningful units (files, records, fields, graphics, and photos) for storing and accessing in order to facilitate searching and updating information.

Data Silos

Separate, unconnected data files resulting in inefficiencies and duplicate effort.

Default accounts

Accounts assigned to your organisation's entities that serve as the default account if a payment is entered without specifically assigning an account for the payment.

Deferred income

The principle of accounting in which the recording of income is deferred until the accounting period when the costs are incurred, related to the generation of the income. For example, for an event, the deferred income is recorded during the month in which the event occurs. For a subscription or membership, it is typically spread evenly across the span of service.

Dues

Membership fees charged to customers.

Duplicate record check

A formula used to make sure the same record is not entered in the database twice. Duplicate record checks are often used on the Major Key field (such as Social Security Number).

Dynamic content items

Also known as iParts. The unique components of core iMIS functionality that can be placed together on a content page (similar to widgets). They are flexible, re-usable and powerful. Most core iMIS functionality is available as dynamic content items. It is an ASP.NET web part control designed for integration with iMIS that allows users to view and, in some cases, create and edit content.

Easy edit

An icon that enables staff users to edit and configure content items and content directly, rather than through the formal content management process.

Effective date

The date used to determine which customers will be billed. Normally, a customer or subscriber will be billed if they have met the billing selection criteria, their Paid Thru date is before the Effective Date, and if a renewal has not already been generated. If you want to override the Effective Date, make the change after selecting a billing cycle. If you change the Effective Date and then select a billing cycle, the Effective Date reverts to the default.

Engagement Management System

A Modern System like the iMIS EMS platform, designed to evaluate and increase the level of involvement of its constituents.

Engagement Scoring

An automatic method of measuring the level of engagement of an organisation's constituents.

End date

The date on which an individual's group membership ends.

Financial entity

A legal entity for which a separate set of balanced financial accounts (or set of books) must be maintained independently. Although accounting information from different entities can be combined for consolidated reporting purposes, all transactions and accounts must be kept in balance for each entity.

General journal

Journal used to record journal entries other than those that are recorded in the Sales and Cash Receipts journal.

General ledger

The final record of the transactions affecting an entity. The ledger contains one page for each account.

General/lookup validation table

A table an administrator creates in the iMIS database that contains the valid values for a given field. See General lookup tables for more information.

GL account

An individual account within the Chart of Accounts that is used to record a financial amount in a journal entry.

ID

The numerical representation assigned to a customer or organisation.

iMIS EMS Enterprise

iMIS EMS Enterprise is the latest version of iMIS for larger organisations and includes advanced functionality. It is cloud-based, hosted in ASI's Microsoft Azure environment, and 100% desktop application free without access to VDS or SQL servers. Previously known as iMIS 20-300.

iMIS EMS Professional

iMIS EMS Professional is the latest version of iMIS for medium- to small organisations and includes standard functionality. It is cloud-based, hosted in ASI's Microsoft Azure environment, and 100% desktop application free without access to VDS or SQL servers. Previously known iMIS 20-100 and iMIS 20-200.

iMIS 20/20 Advance Program

iMIS 20/20 Advance Program is a transitional program developed to aid clients on iMIS 2017 to upgrade to iMIS EMS Enterprise. It is cloud-based, 100% desktop free, and hosted in ASI's Microsoft Azure environment or an approved third-party hosting partner. The Cloud Plus option provides access to VDS and SQL servers.

iMIS 2017

iMIS 2017 is the last iMIS version to include a desktop application. It can be hosted in the Cloud or on-premises and provides access to VDS and SQL servers. It has limited access to web-based product functionality.

IQA

Intelligent Query Architect. The query-building tool used to extract data from the iMIS database.

Join date

Date on which an individual became a member of a group.

Marked for erasure

Indicates that all personal data associated with a contact's record will be erased from the iMIS database, unless the erasure process is cancelled.

Member responsive site

An out-of-the-box iMIS site that renders a version of the Member site that is optimised for Responsive Web Design. This version is formatted to be accessed across a variety of devices and respond dynamically to the variations in device screen sizes. This site is accessible by your association members and by your staff who are working remotely or with a mobile device.

On behalf of

Performing an action in place of another person.

One Source of Truth

The data requirement that must be there to enable correct decision making. Data must be accurate and comprehensive coming from every aspect of the system, including finance and activity history. Data must be up to date and easily accessible. Data must be secure and PCI-compliant.

Open credit

The portion of any payment that is in the unrestricted, unapplied state. An open credit can be applied toward new or existing order or open invoices.

Open invoice

An invoice with an unpaid balance.

Page Builder

A content management tool that allows organisations to build and manage pages of text, multimedia files, and iMIS content items; used for building web pages comprising content items in the Content Gallery. Formerly known as Content Designer.

Paid Thru

Refers to the expiration date of the membership or subscription, or the period through which the customer has paid. It is always the last day of the month.

Payment method

The allowable method of payment a customer can use and the bank account into which the payment should be deposited. The payment method might specify the general type of payment (credit card, cash, check), or it might specify a specific type of payment (VISA, MasterCard).

Query

User-defined criteria used to retrieve a subset of data.

Quick start sites

Out-of-the-box iMIS websites that are easily copied in order to create customised sites for an organisation. Sites include Member Responsive, Donor, Annual Conference, and Annual Conference Mobile. These ready-to-go sites and site templates get you up and running in hours, instead of weeks or months. Formerly known as Sample Sites.

Relationship

A method for establishing a logical connection between two customers in the database.

Renewal invoice

An invoice generated by the selling organisation to request that the customer repurchase or renew a subscription or membership service. The renewal invoice data is generated directly and is not connected to the fulfilment of an order.

Renewed thru

Refers to the projected Paid Thru date for an overall membership. It is the term-ending date through which the customer has been billed, whether or not payment has been received.

Reporting

A set of tools in iMIS that can be used for a wide range of tasks. Reports span a broad range of outputs, for all of the iMIS modules, including rosters, status summaries, letters, badges, and statistical reports.

RiSE

The website content management system that is a native, integral part of iMIS.

Search Engine Optimisation (SEO)

The process of affecting the visibility of a website or a web page in a search engine's natural search results. iMIS users can customise their websites using tags, article titles, quality content, and intuitive links to maximise their SEO.

Security groups

Control which iMIS features group members can see, and which capabilities within each feature group members can use. Security groups are defined in the user record.

Security roles

Grant specific administrative privileges to user records. For example, one security role might let you use and edit an iMIS definition object in the Document System, while another security role might let you use that object but not edit, or even see, its properties.

Shopping cart

A tentative commerce transaction data set that exists for any new commerce transaction until checkout and order submission. The cart might contain products added to the cart, adjustments processed, and the list of open invoices selected for payment. Items can be added, edited, or removed from the cart at any stage before submission.

Shortcut URL

iMIS-supported ability to define a friendly, easy to remember URL (for example, www.MyOrg.org/AnnualConference, www.MyOrg.org/Events, www.MyOrg.org/Join) that redirects to a specific page. These can be created for any website and can link to a URL or content record. Shortcuts frequently access system pages such as SignIn, EventDisplay, ItemDisplay, AccountPage. They are provided out-of-the-box, and can be edited, but not deleted.

Site Builder

A website and navigation management RiSE tool that allows organisations to establish one or more websites, create navigation menus and connect navigation to content; The tool used for building and managing websites.

Sitemap

A zero-based hierarchy of navigation within and between websites. There is one sitemap per website. This feature enables:

- Different navigation for different user groups – within the same website (for example, Staff/Authenticated/Unauthenticated)
- Map navigation to different content for different user groups
- Override behaviour of shared content (content items) when accessed through specific navigation
- Override ContentArea source folder (look & feel elements)

Source

In IQA, an object that is available for building query definitions. Sources include both business objects and query objects. Query definitions can be created based on one or more sources.

Source query

The original query or business object from which a new query is run.

System administrator

A user with complete access and privileges.

Report Writer

The iMIS Report Writer is a powerful tool that enables you to create reports and dashboards that are directly embedded in iMIS. The Report Writer offers an easy drag-and-drop tool that allows you to quickly pull your data into a report.

SSRS

SQL Server Reporting Services (SSRS) is a reporting software that allows you to produce formatted reports with tables in the form of data, graph, images, and charts. These can be created and added to iMIS for receipts, invoices certificates etc

Forms Builder

Form Builder allows you to create and manage forms for various purposes according to your needs using the Form content item. With the Form content item, you can deploy powerful forms based on iMIS data. This enables staff and stakeholders to interact with your iMIS database. Forms that are defined in the Form Library can be deployed in multiple locations throughout your iMIS instance on both your Staff and member-facing pages.

Staff site

A cloud-based website where staff can manage their members from. Staff can complete transactions and updates for contacts, assist in renewal, registration, and purchasing.

Tag

Keyword or category name used to classify website information.

Tagged list

Listing of content tagged with a specific keyword and, optionally, related tags. A content item which aggregates content pages that contain specified tags and satisfy other defined criteria into a display list. The tagged list definition includes an association with a tagged list format that defines how the aggregated content will be displayed.

Tagged list format

An iMIS definition object that contains information for how a tagged list content item should display details for each content page that is displayed by the tagged list.

**Tagging**

When a content author tags a content page, the tag is added to the metadata for the content page and to the website's search index. This facilitates the inclusion of the content page in website searches and tagged lists displayed on other content pages.

Unauthenticated user

A user who has not logged in.

User-defined field

A method to add metadata to content and to filter search results.