

10 things to do in iMIS on a rainy day

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ASIA PACIFIC CHAPTER

iMIS rainy day ideas

1. Why?
2. 10 spring cleaning tasks for everyone
3. Other ideas

Why spring clean

- Users are busy
- Administrators are time poor
- Resources are limited
- Best practice
- Quality & process improvement
- Identify problems before they find you!

No. 1 - Logins

iMIS Administrators

- Go through your list of iMIS Users and disable any that have left your organisation.
- Confirm existing users still have the right level of access to each module.
- Do all users need admin access to certain modules?

No. 2 - Activities

iMIS Administrators

- Review all of the activities that you have set-up in iMIS and identify whether users are using them.
- Run a list of those that have been used in SQL Query Analyzer

```
select distinct activity_type from activity
```

- Do you know how many debtors exist in iMIS?
- Run a trial balance report and check for unapplied funds
- Issue outstanding invoices – your accountant will thank you for it!

No. 4 – Letter System

- If you are sending the same letter or email to your members or donors then why not develop it as a new letter in iMIS?
- Did you know that you can use the Letter System to send personalised emails?

No. 5 – Data Integrity

- You don't need a policy to get started in data integrity.
- Basic principle applies to all iMIS databases

Garbage In = Garbage Out

No. 5 – Data Integrity

- Start at the top of your iMIS customers module and work your way your fields!
- Define each field – what is it? how is it used?
- Are there any opportunities? Could you add a drop down menu for data consistency?

No. 5 – Data Integrity

- Develop iQA, Adhoc or other queries to identify problem data.
 - Missing
 - Incomplete
 - Incorrect formats

No. 6 – iMIS desktop

- Spend 5 minutes with each user showing them these three tips:
 1. Editing the order and display of detail and history tabs
 2. Copy/paste function
 3. Opening a new instance of iMIS

No. 7 – Test environment

- Is your test environment up and running?
- If not, your organisation should consider establishing a test environment for developing new ideas and training.

No. 8 – Back-up

iMIS Administrators

- Data is considered as the number one asset for an organisation - is it protected?
- Get a back-up solution in place!
- When did you last run a back-up restore?

No. 9 - Learn

- There is so much to learn when it comes to using iMIS.
- Do you really know all the features that could be applied to your improve your iMIS?
- Have you learnt about the latest upgrade?

- ASI Help Site
<http://docs.imis.com> (Firefox)
- NiUG Presentations
www.niug.org
- iMIS Community (for developers)
www.imiscommunity.com

No. 10 - Train

- Run an hour training session
- Develop documentation on common questions – e.g. Searching with wild cards, adding activities



Other rainy day ideas?