

Roadmap to iMIS EMS Series

Removing Customizations – SQL Views

Presented by:
Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 120 integrations
- ASI's Client Sales Leader of the Year and Chairman Circle for 2020





Presented by



Presenter:

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Moderator:

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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete

Upgrade to EMS



Direct Upgrade

- ASI Hosting Azure
- Automatic Updates
- Security, Disaster Recovery, & PCI Validation

20/20 Advance Program

- ASI Hosting Azure
- **Periodic Updates**
- Security, Disaster Recovery, & PCI Validation

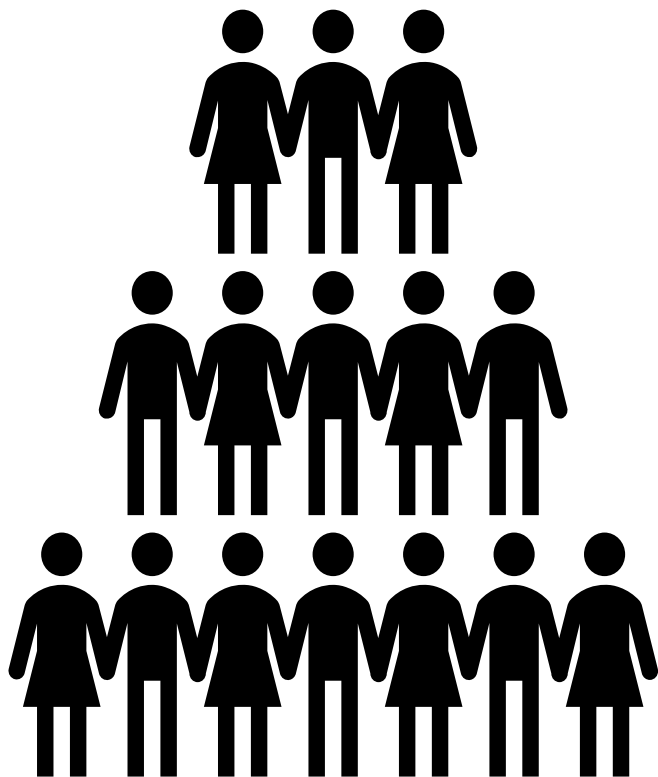
Self-Hosted

- Client Preference
- Client Responsible for Updates and Support
- **Access to SQL**

Have AiSP run the
ASI customization
scripts

HELP!

Remove all
customizations!!!



SQL Custom Views

- <10
- 10-50
- 50-100
- >100
- unknown



Segregate



Archive



Analyze



Organize Views

Type	Department/ iMIS Module/ Business Unit	Solution
<ul style="list-style-type: none">• Standalone• Reports• Business Objects• Used for other SQL tools (Stored Procedures or SQL Jobs)• Automated FTP• Task Centre	<ul style="list-style-type: none">• Membership• Finance• Events• Certification• Fundraising	<ul style="list-style-type: none">• Archive• IQA• Business Object• PA+



ObjectName	Department/Module	Solution
syncobj_0x3241343244353233		Drop
syncobj_0x3245333636423337		Drop
syncobj_0x4346344544463442		Drop
syncobj_0x4444313541464435		Drop
vcsi_importSecurity	Membership	Archive
vCSI_TopLevelID	Membership	IQA
vcsi_UpdateLoginsPasswords	Membership	Archive
vMeetingInfo	Events	IQA
vw_ATS_GTWUnsyncedOrders	Events	BO
vw_Zerista	Events	IQA
vw_Zerista1	Events	IQA
vw_Zerista2	Events	IQA
vwATS_ZeristaSessions	Events	IQA
vWYMeetings	Events	IQA
vwZeristaReg	Events	IQA
vZerista	Events	IQA

What Can I do Now?



Rename with 'Z_'

Run Drop Script

WARNING: Some customizations are still needed in 2017. Please check with your AiSP before running the drop script.

What is the end goal of the process?



Who benefits? (Member/Prospect/Staff)



How does this effect the UX?

Is there an out of the box iMIS solution?

IQA, BO, PA+,
Expression Builder

Is there a third-party solution that works with iMIS?

CSI iMIS Data Management Suite
ATS Cloud Data Manager
ATS Bridge(s)

Use the ASI REST API's

Can I build something custom?



Replacement Options

- IQA
- Business Objects
- PA+
- RiSE Page
- Expression Builder (within Business Object Designer)
- Report Writer

IQA





Maximize IQA

- Filters (Min/Max)
- Functions
- Security Groups
- SQL Expressions

Use Case – All Cancelled Dues Activities

```
ALTER VIEW [dbo].[vwACA_Cancel_Mbrs]
AS
SELECT      SEQN, ID, ACTIVITY_TYPE, TRANSACTION_DATE, EFFECTIVE_DATE, PRODUCT_CODE, OTHER_CODE, DESCRIPTION, SOURCE_SYSTEM,
            SOURCE_CODE, QUANTITY, AMOUNT, CATEGORY, UNITS, THRU_DATE, MEMBER_TYPE, ACTION_CODES, PAY_METHOD, TICKLER_DATE,
            NOTE, NOTE_2, BATCH_NUM, CO_ID, OBJECT, INTENT_TO_EDIT, UF_1, UF_2, UF_3, UF_4, UF_5, UF_6, UF_7,
            ORIGINATING_TRANS_NUM, ORG_CODE, CAMPAIGN_CODE, OTHER_ID, SOLICITOR_ID, TAXABLE_VALUE, ATTACH_SEQN,
            ATTACH_TOTAL, RECURRING_REQUEST, STATUS_CODE, NEXT_INSTALL_DATE, GRACE_PERIOD,
            MEM_TRIB_CODE, TIME_STAMP
FROM        dbo.Activity
WHERE       (SOURCE_CODE = 'CANCEL') AND (ID <> '') AND (PRODUCT_CODE = 'ANNUAL_DUES')
GO
```



- Use SQL Query Tools to help you build your IQA
- Copy SQL from IQA>>Summary Tab and run in SSMS

SQL

```
SELECT DISTINCT [vBoCsOrderLines].[ProductCode] AS [Product], [vBoCsOrderLines].[Description], [vBoCsProduct].[ProductType], [vBoNetContactData].[FullName], [vBoNetContactData].[ContactKey], [vBoCsOrderLines].[ExtendedAmount], [vBoCsOrders].[TaxRate1], vBoCsOrderLines.ExtendedAmount + vBoCsOrders.TaxRate1 AS [TaxedAmount] FROM vBoCsOrders INNER JOIN vBoCsOrderLines ON vBoCsOrders.OrderNumber = vBoCsOrderLines.OrderNumber INNER JOIN vBoCsProduct ON vBoCsOrderLines.ProductCode = vBoCsProduct.ProductCode INNER JOIN vBoNetContactData ON vBoCsOrders.ShipToId = vBoNetContactData.ID WHERE ([vBoCsProduct].[ProductType] <> 'MEETING' AND [vBoCsProduct].[ProductType] <> 'CERTIFY')
```

- Join tables in BO
 - Inner Joins
 - Left and Right Joins
- Use Filter Expression for complicated requirements

Use Case – Select the longest held Certificate that is current

Filter Expression

```
Activity.PRODUCT_CODE IN  
('DLS_ES','DLS_HFI','DLS_CPT','DLS_GEI','DLS_NCPAD','DLS_NSP','DLS_ACS','DLS_HFD','DLS_PD','DLS_ETT','DLS_RCEP')  
AND Activity.EFFECTIVE_DATE <= getdate()  
AND Activity.THRU_DATE >= getdate()  
AND Activity.EFFECTIVE_DATE <= (SELECT MIN (A.EFFECTIVE_DATE) FROM ACTIVITY A WHERE A.ID = ACTIVITY.ID)
```

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- Creating a security group adds a view to SQL
 - Must include ContactKey to create a group
- Build new Business Object on security group view
 - View starts with **vIQAGroupName**
- Add new Business Object to IQA and filter/sort on new fields

```
Select Dues.SEQN,  
       Dues.ID,  
       Dues.TRANSACTION_DATE,  
       Dues.PRODUCT_CODE,  
       Dues.EFFECTIVE_DATE,  
       Dues.THRU_DATE,  
       Dues.MEMBER_TYPE  
  
From Activity dues inner join Product p  
       on dues.PRODUCT_CODE=p.PRODUCT_CODE  
  
Where Dues.ACTIVITY_TYPE='DUES'  
       and left(Dues.PRODUCT_CODE,6) ='ANNUAL '  
       and p.PROD_TYPE='DUES'  
       and AMOUNT>0  
  
UNION  
  
Select ACTIVITY_SEQN,ST_ID,TRANSACTION_DATE,t.PRODUCT_CODE,EFFECTIVE_DATE,t.PAID_THRU,n.MEMBER_TYPE  
From Trans t inner join Product p  
       on t.PRODUCT_CODE=p.PRODUCT_CODE  
       inner join Name n  
       on t.ST_ID=n.ID  
where POSTED=0  
       and left(t.PRODUCT_CODE,6) ='ANNUAL '  
       and p.PROD_TYPE='DUES'  
       and ACTIVITY_SEQN=0  
       and AMOUNT<0
```



Run SQL view compare data to new IQA



Test new process



Move new IQA and process into production



Archive old view and process

Use `csContactBasic` unless `contact_key` is needed then use `NetContactData`

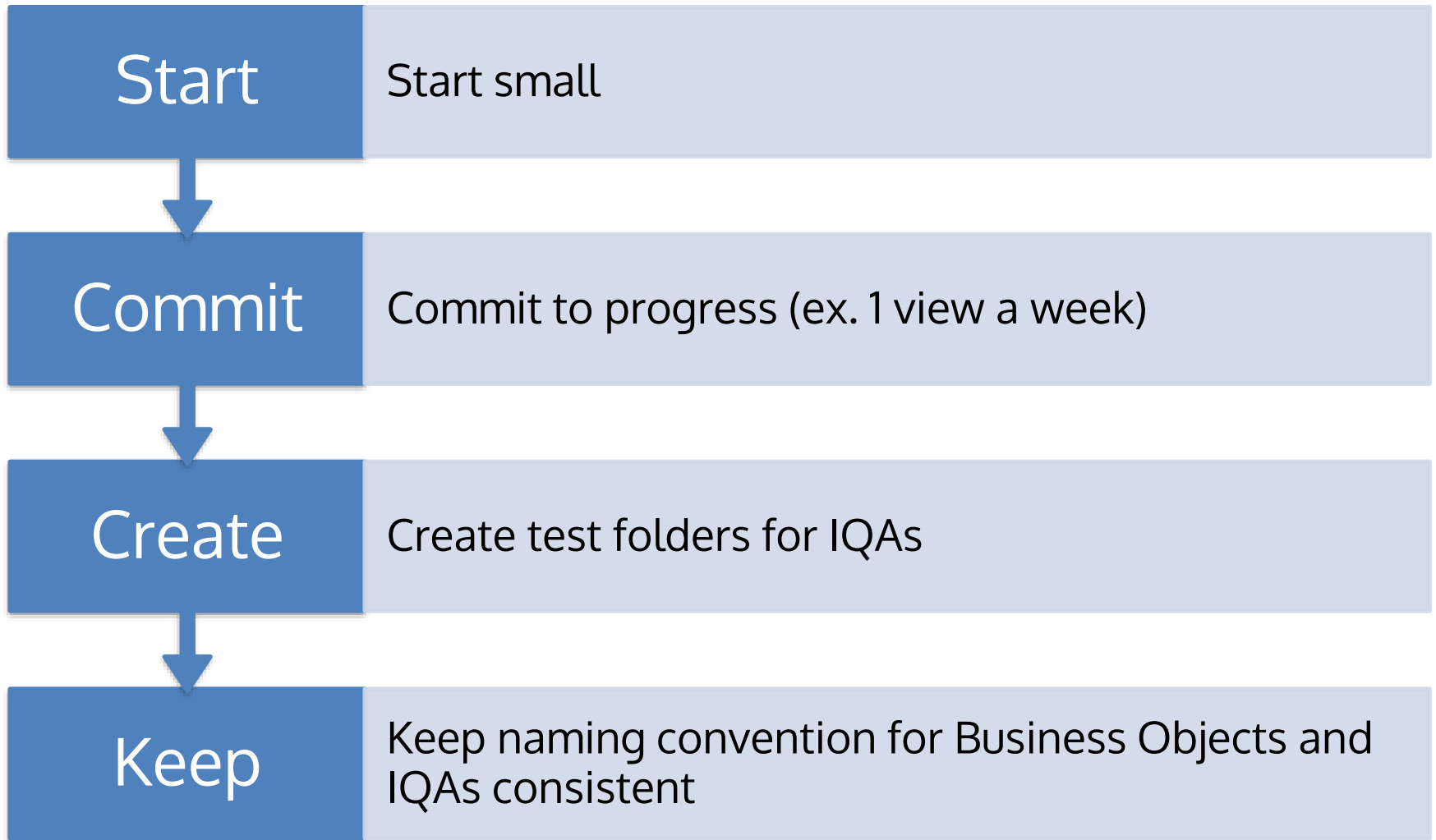
Create custom Business Objects to improve your IQAs

Write for the rule, not the exception

<https://www.pathlms.com/ats-learningcenter/courses/11554>



Things to think about





Questions & Answers



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