

# *User Manual*

## *wvActivity for iMIS*

**By:**



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# *wvActivity* User Manual

## Version 1.0

This manual is written for users to configure the *wvActivity* module of *wvSuite*.

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Updates may be made to this documentation and incorporated into later editions.

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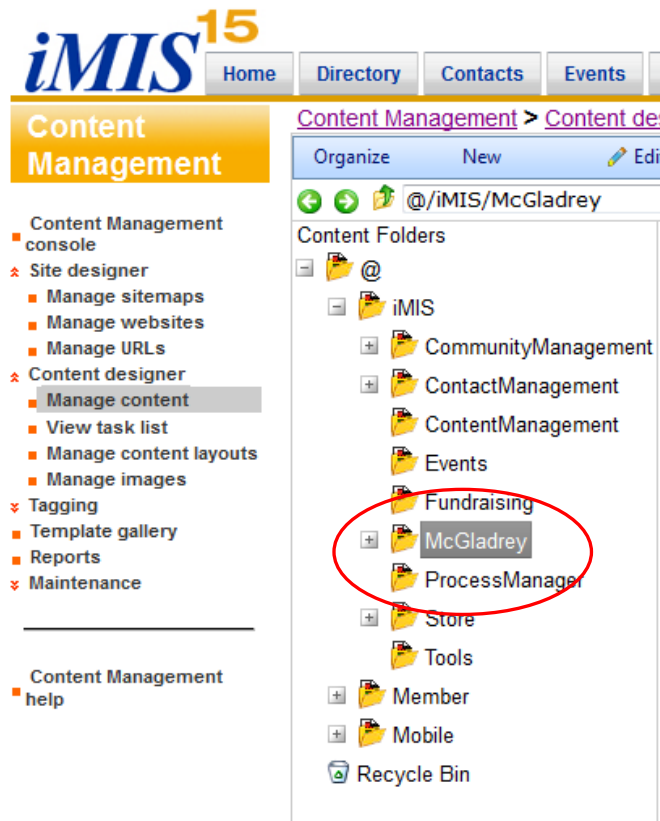
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## wvActivity - Configuration

The following are steps to configure the Activity iPart. Installation of wvSuite is required before proceeding. If the installation of wvSuite has not yet been performed, instructions for the installation are found in the wvSuite Installation manual.

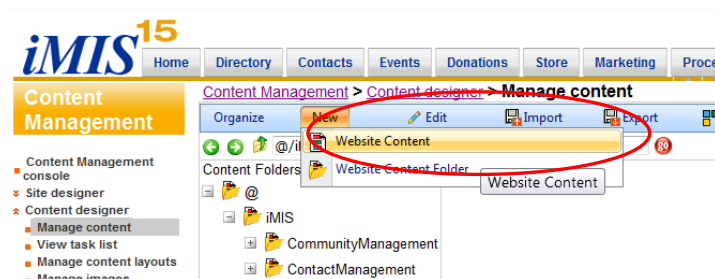
### 1. Create a place for the content

- a. Go to Content Management->ContentDesigner->Manage Content
- b. Create new folder called McGladrey under iMIS

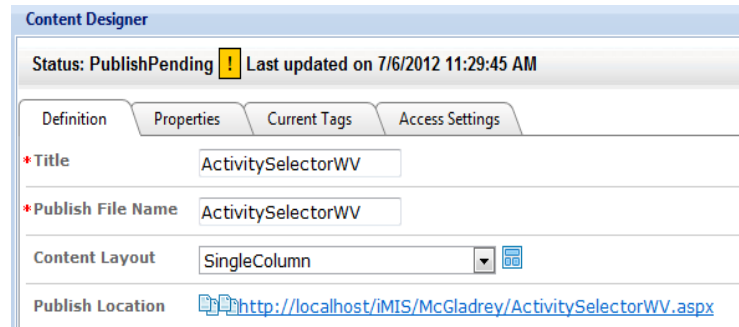


### 2. Create new content for the selection page of the activities

- a. Choose New
- b. Choose Website Content



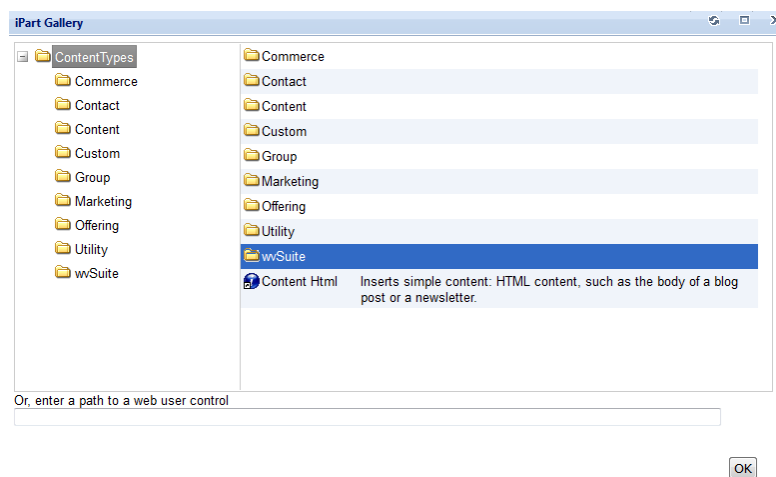
- c. Title the new content ActivitySelectorWV



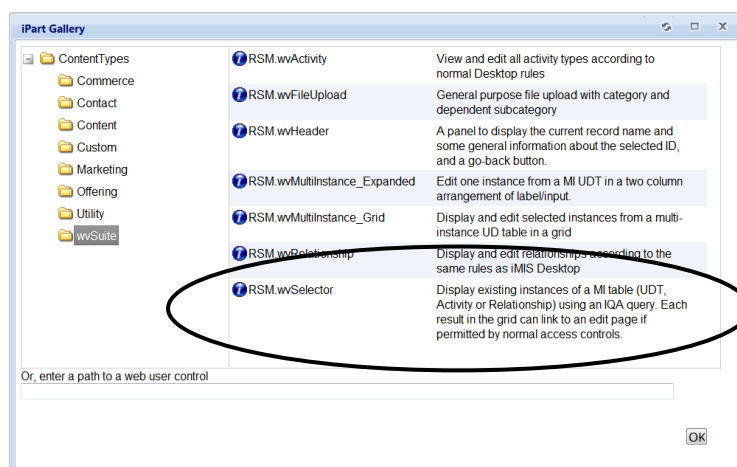
The screenshot shows the 'Content Designer' window with the 'Properties' tab selected. The status bar at the top indicates 'Status: PublishPending' with a yellow warning icon and 'Last updated on 7/6/2012 11:29:45 AM'. The 'Definition' tab is also visible. The 'Properties' tab contains the following fields:

- \*Title: ActivitySelectorWV
- \*Publish File Name: ActivitySelectorWV
- Content Layout: SingleColumn (with a dropdown arrow and a small icon)
- Publish Location: <http://localhost/IMIS/McGladrey/ActivitySelectorWV.aspx>

- d. Click add content and select the wvSuite folder



- e. Choose the RSM.wvSelector in the wvSuite directory



### 3. Configure the RSM.wvSelector iPart

**wvSelector configuration**

This section

\*Section title: Activities for

Instructions (HTML OK):

PageCode for this page (if child of another selector): (None)

Lock with parent page (if child of another selector):

Detail page

\*Target URL for detail of found records: ~/iMIS/McGladrey/Activ

\*Child Page Type: Activity

Creating new items

Allow "Create New" Button: ☒

Allow user to choose selector value on "Create New": ☒

Create New button tooltip:

IQA Query

\* IQA Query: \$/RSMCustomizations/IP select

the query definition, you must return here, save and publish.

**IQA Query settings.**

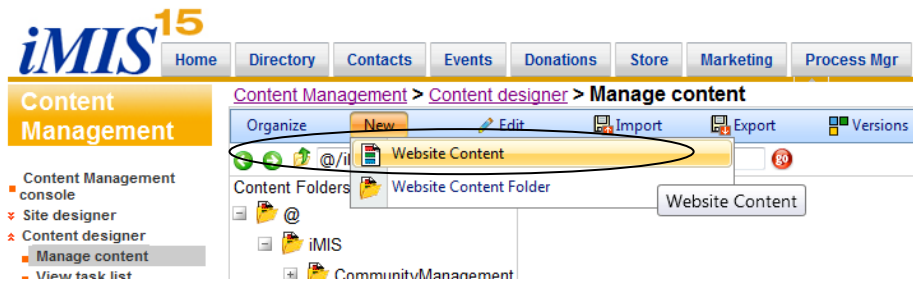
#	Display Name	Display Type	Value
1	iMIS Id Equals	Auto Assign	Selected iMIS ID

Fields	Description	Value
Name	Unique Identifier of the part on the display page	ActivitySelectorWV
Section Title	Title on the page followed by selected name	Activities for
Instructions	Instructions are displayed below the title. The instructions should impart information to users on what they need to do or what they can expect to find in this section.	
PageCode for this page (if child of another selector):		(NONE)
Lock with parent page (if child of another selector):		Unselected
Target URL for detail of found records:	Page that will be navigated to on select or create new	~/iMIS/McGladrey/ActivityDetails.aspx
Child Page Type:	Type of Child page	Activity
Allow "Create New" Button:	When checked, a new item can be created in the target page.	Selected
Allow user to choose selector value on "Create New":	When checked, allows the user to define the selector value on the new item.	Selected
Create New button tooltip:	Tooltip for create new button when hovering over it	
IQA Query:	The path to the query that performs the selection. A sample query is provided.	Click Select -> Select ActivitySelector
IQA Query settings	These are the filters for the query. When this iPart is used in the web view of iMIS (staff view), iMIS ID Equals normally choose Auto Assign and Selected iMIS ID. For public views, use Auto Assign and Logged In iMIS ID	
Display Type		select Auto Assign
Value		Selected iMIS ID (staff website) Logged In iMIS ID (public facing website)



#### 4. Create the Activity Detail page

- a. Choose New
- b. Choose Website Content



- c. Title the new content ActivityDetails

**Content Designer**

Status: Published

Definition Properties Current Tags Access Settings

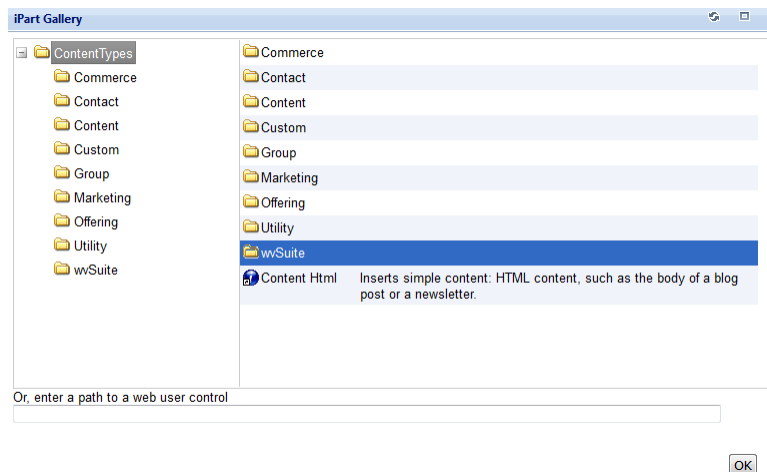
\*Title

\*Publish File Name

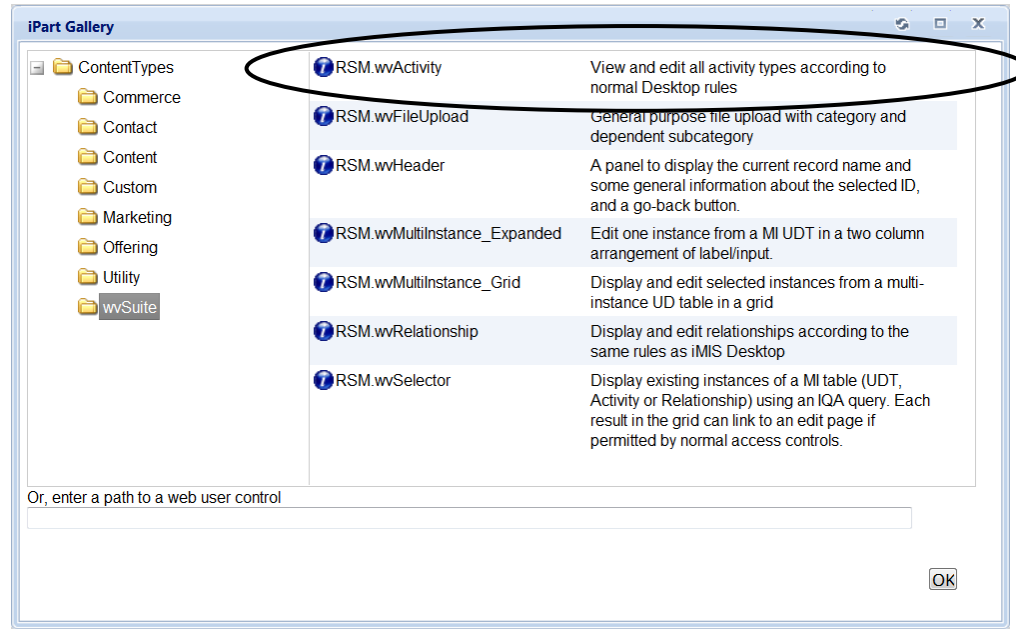
Content Layout

Publish Location <http://localhost/iMIS/McGladrey/ActivityDetail.aspx>

- d. Click add content and select the wvSuite folder



- e. Choose the RSM.wvActivity in the wvSuite directory





## 5. Configure RSM.wvActivity

**Configure iPart - RSM.wvActivity**

\*Name

---

\*Return URL

---

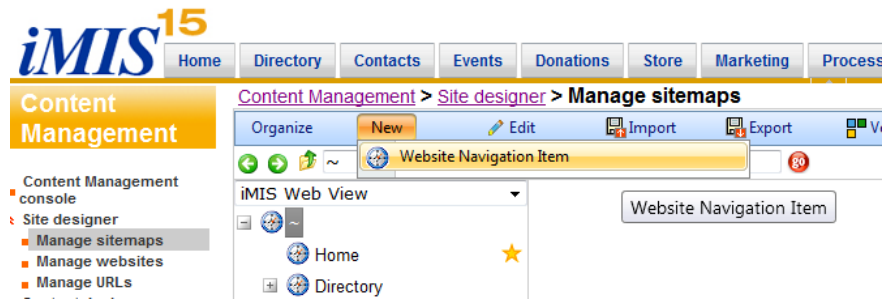
wvSuite version 1.0.6575.1090, Flavor=Release;Build=20120702.184827;Rev=6575;  
Common version 1.0.6528.1000, Flavor=Release;Build=20120618.121405;Rev=6528;

Field Values:

Field	Description	Values
Name	Unique Identifier of the part on the display page	ActivityDetail
URL to Return To:	URL where the page should return upon save/close.	~/iMIS/McGladrey/ActivitySelectorWV.aspx

6. Add a navigation item to display the Activity selection information.

- a. Go to Site Designer-> Manage sitemaps
- b. Create new website navigation item



**Manage sitemaps**

Status: Working

Properties Workflow Management Options Access Settings

Navigation Link Text: Activities

Navigation Folder Name: wwActivities

Tool Tip Description:

Content or URL to Link to: @/iMIS/McGladrey/Activ [select](#) [i](#)

Or select a standard page: (None) [i](#)

URL Parameters:

Breadcrumb Name: Activities [i](#)

☐ Hide on this page

Override Content Title: [i](#)

Navigation Code: [i](#)

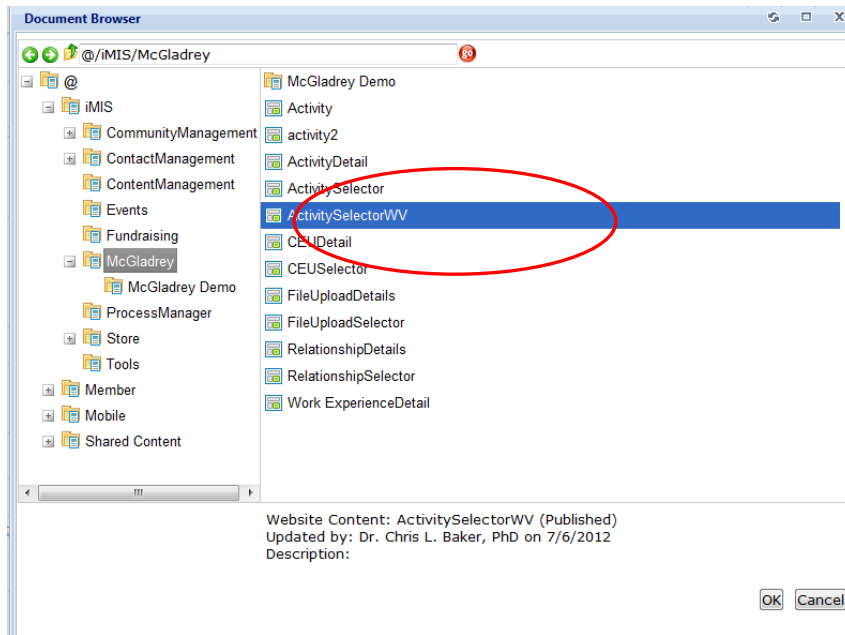
Image URL: [select](#)

CSS Class:

Folder containing template gallery content

☒ Inherit from parent

- c. **For Content or URL to Link to:** Select -> ActivitySelectorWV



- d. In the left navigation area, move the navigation item to your chosen location by dragging and dropping to the preferred location.
- e. Publish the navigation item

## 7. System Setup:

These settings can be found under System Setup->RSM Configuration  
You can place all types that are not allowed in the text box.


Activity types which should never be displayed in ActivityEditor even when keywords permit. (RSM.wvActivity.TypesBlacklist)

## Finished Activity Example Screenshots:

### [Contacts](#) > Activity Selector

Choose Activity Jennifer Adams, IMIS International

 Create New


Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units	Description
<a href="#">AWARD</a>		5/15/2012 12:00:00 AM				0.0000	0.00	Award


### Edit current activity:

#### [Contacts](#) > Activity Selector

AWARD Activity - Award

Type

Date  

Service Date  

Code


Description

### Create new:

#### [Contacts](#) > Activity Selector

Activity

Type

Date  

## wvActivity – Create New Activity

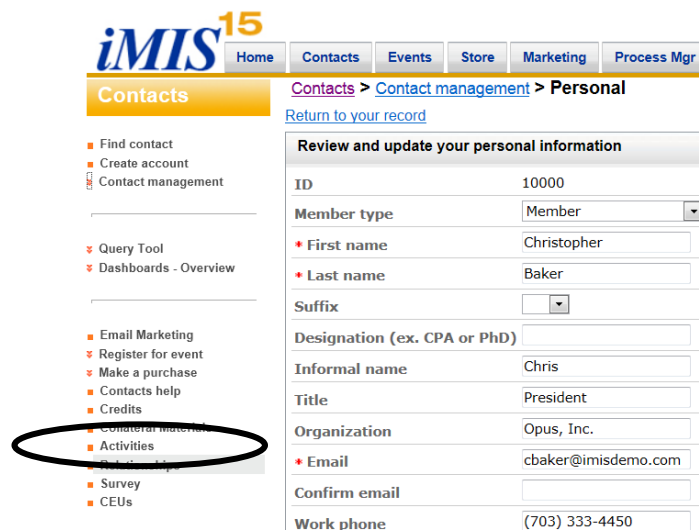
The following are steps to create a new Activity using the wvActivity iPart.

1. Choose record on which the activity is to reside.
  - a. From Contacts tab (or tab labeled for your records), choose Find contact.



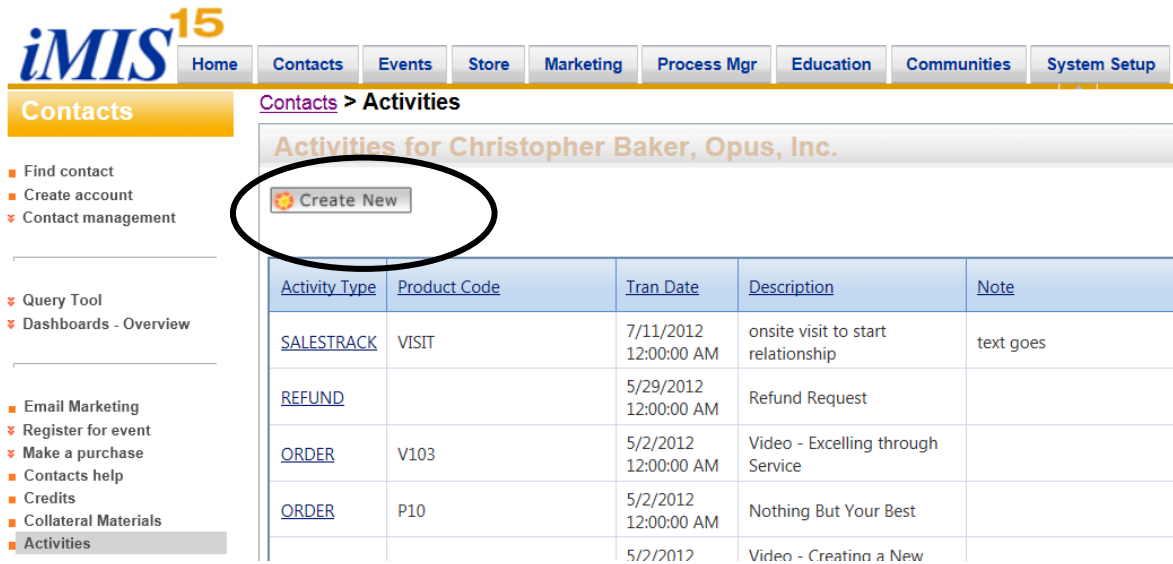
The screenshot shows the iMIS 15 web interface. The top navigation bar includes links for Home, Contacts, Events, Store, Marketing, and Process M. The left sidebar has a 'Contacts' section with options like 'Find contact', 'Create account', and 'Contact management'. The main content area is titled 'Contacts > Find contact' and contains a search form with fields for 'Select a Query', 'Last name starts with', 'First name starts with', 'Company contains', and 'ID equals'. A 'Find' button is at the bottom of the form. Below the form, a message reads 'Please enter your search criteria to view results'.

- b. Proceed normally to obtain desired record. (See standard iMIS documentation on how to retrieve a record.)
2. Choose the wvActivity link from the navigation. (In this example, it is called Activities. Your website may have a slightly different link name and be in a different position on the navigation.)



The screenshot shows the iMIS 15 web interface with the 'Personal' information form. The top navigation bar includes links for Home, Contacts, Events, Store, Marketing, and Process Mgr. The left sidebar has a 'Contacts' section with options like 'Find contact', 'Create account', and 'Contact management'. The main content area is titled 'Contacts > Contact management > Personal' and contains a form for 'Review and update your personal information'. The form fields include ID (10000), Member type (Member), First name (Christopher), Last name (Baker), Suffix, Designation (ex. CPA or PhD), Informal name (Chris), Title (President), Organization (Opus, Inc.), Email (cbaker@imisdemo.com), Confirm email, and Work phone ((703) 333-4450). The 'Activities' link in the left sidebar is circled.

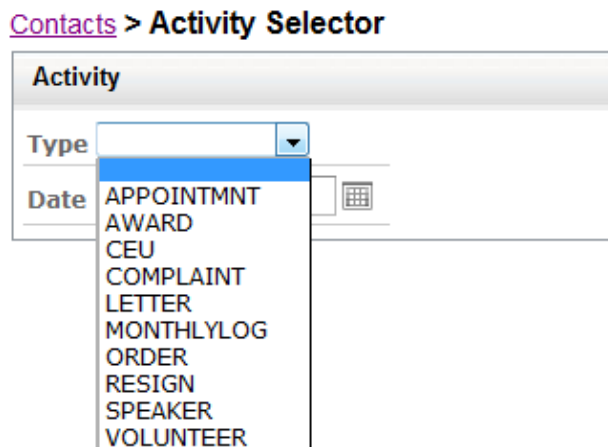
- Click Create New button to create a new activity.



The screenshot shows the iMIS 15 Home page. The top navigation bar includes links for Home, Contacts, Events, Store, Marketing, Process Mgr, Education, Communities, and System Setup. The left sidebar contains a 'Contacts' menu with options like Find contact, Create account, and Contact management. The main content area is titled 'Contacts > Activities' and shows 'Activities for Christopher Baker, Opus, Inc.'. A 'Create New' button is circled in the top left of the activity list. Below it is a table of activities.

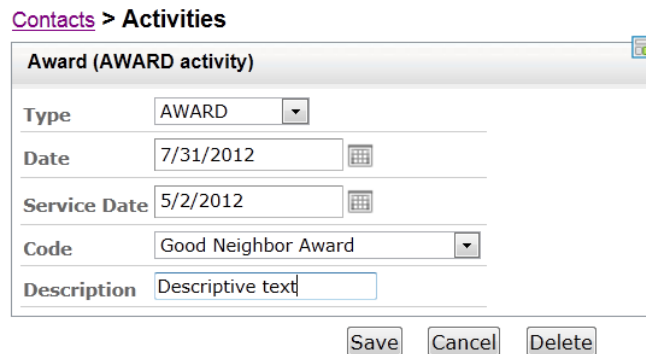
Activity Type	Product Code	Tran Date	Description	Note
<a href="#">SALESTRACK</a>	VISIT	7/11/2012 12:00:00 AM	onsite visit to start relationship	text goes
<a href="#">REFUND</a>		5/29/2012 12:00:00 AM	Refund Request	
<a href="#">ORDER</a>	V103	5/2/2012 12:00:00 AM	Video - Excelling through Service	
<a href="#">ORDER</a>	P10	5/2/2012 12:00:00 AM	Nothing But Your Best	
		5/2/2012	Video - Creating a New	

- Choose the type of activity to create. Enter the date for the activity. This date will appear as the transaction date on the activity.



The screenshot shows the 'Contacts > Activity Selector' form. The 'Type' dropdown menu is open, displaying a list of activity types: APPOINTMNT, AWARD, CEU, COMPLAINT, LETTER, MONTHLYLOG, ORDER, RESIGN, SPEAKER, and VOLUNTEER. The 'Date' field is also visible.

- Complete the fields listed for the activity chosen. Click Save.




The screenshot shows the 'Award (AWARD activity)' form. The 'Type' dropdown is set to 'AWARD'. The 'Date' field is set to '7/31/2012'. The 'Service Date' field is set to '5/2/2012'. The 'Code' dropdown is set to 'Good Neighbor Award'. The 'Description' field contains the text 'Descriptive text'. At the bottom of the form are 'Save', 'Cancel', and 'Delete' buttons.



## wvActivity – Edit Activity

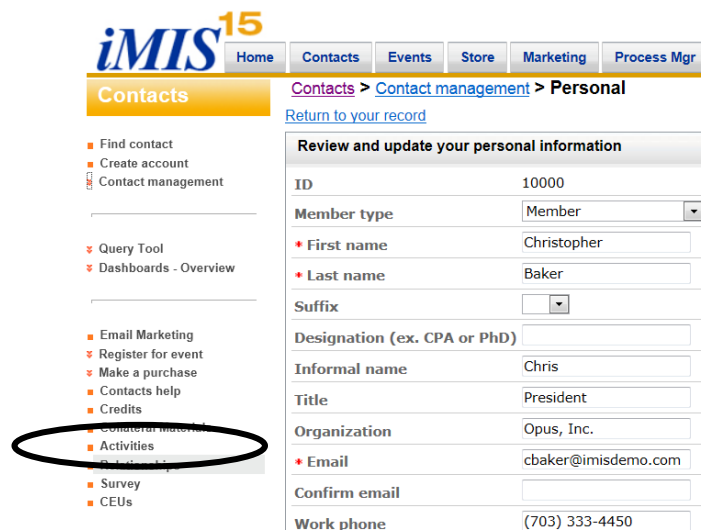
The following are steps to edit an existing Activity using the wvActivity iPart.

1. Choose record on which the activity resides.
  - a. From Contacts tab (or tab labeled for your records), choose Find contact.



The screenshot shows the iMIS 15 interface. The top navigation bar includes Home, Contacts, Events, Store, Marketing, and Process M. The left sidebar has a 'Contacts' section with options: Find contact (selected), Create account, Contact management, Query Tool, and Dashboards - Overview. Below this is an 'Email Marketing' section with options: Register for event, Make a purchase, Contacts help, Credits, and Collateral Materials. The main content area is titled 'Contacts > Find contact'. It features a 'Source' section with a 'Select a Query' dropdown set to 'Queries'. Below this are input fields for 'Last name starts with', 'First name starts with', 'Company contains', and 'ID equals'. A 'Find' button is at the bottom of these fields. A message at the bottom says 'Please enter your search criteria to view results'.

- b. Proceed normally to obtain desired record. (See standard iMIS documentation on how to retrieve a record.)
2. Choose the wvActivity link from the navigation. (In this example, it is called Activities. Your website may have a slightly different link name and be in a different position on the navigation.)



The screenshot shows the iMIS 15 interface. The top navigation bar includes Home, Contacts, Events, Store, Marketing, and Process Mgr. The left sidebar has a 'Contacts' section with options: Find contact, Create account, Contact management, Query Tool, and Dashboards - Overview. Below this is an 'Email Marketing' section with options: Register for event, Make a purchase, Contacts help, Credits, and Collateral Materials. The 'Activities' link in the sidebar is circled. The main content area is titled 'Contacts > Contact management > Personal'. It features a 'Review and update your personal information' section with fields for ID (10000), Member type (Member), First name (Christopher), Last name (Baker), Suffix, Designation (ex. CPA or PhD), Informal name (Chris), Title (President), Organization (Opus, Inc.), Email (cbaker@imisdemo.com), Confirm email, and Work phone ((703) 333-4450). A 'Return to your record' link is at the top of the form.

- Find the activity you wish to edit from the list of previously created activities. To assist in finding the activity, the list can be sorted by any column. Click on the Column Title link to sort. Click on the same link again to sort in the opposite order.

[Contacts](#) > [Activities](#)

**Activities for Christopher Baker, Opus, Inc.**

[Create New](#)

<a href="#">Activity Type</a>	<a href="#">Product Code</a>	<a href="#">Tran Date</a>	<a href="#">Description</a>	<a href="#">Note</a>	<a href="#">Thru Date</a>	<a href="#">Amount</a>	<a href="#">Units</a>
<a href="#">AWARD</a>	LE	12/4/2007 12:00:00 AM	Lone Eagle Award			0.0000	0.00
<a href="#">AWARD</a>	GN	7/25/2000 12:00:00 AM	Good Neighbor Award			0.0000	0.00
<a href="#">AWARD</a>	MY	7/15/1996 12:00:00 AM	Member of the Year			0.0000	0.00
<a href="#">CEU</a>	SEM3/REG	12/1/2011 12:00:00 AM	Seminar Registration			0.0000	8.00
<a href="#">CEU</a>		4/15/2009 12:00:00 AM	Seminar			8.0000	8.00
<a href="#">CEU</a>	INT07/WEB	9/2/2007 12:00:00 AM	Defining a Web 2.0 Strategy			0.0000	3.00

- Click the link in the Activity Type column of the activity to edit.

[Contacts](#) > [Activities](#)

**Activities for Christopher Baker, Opus, Inc.**

[Create New](#)

<a href="#">Activity Type</a>	<a href="#">Product Code</a>	<a href="#">Tran Date</a>	<a href="#">Description</a>	<a href="#">Note</a>	<a href="#">Thru Date</a>	<a href="#">Amount</a>	<a href="#">Units</a>
<a href="#">AWARD</a>	LE	12/4/2007 12:00:00 AM	Lone Eagle Award			0.0000	0.00
<a href="#">AWARD</a>	GN	7/25/2000 12:00:00 AM	Good Neighbor Award			0.0000	0.00
<a href="#">AWARD</a>	MY	7/15/1996 12:00:00 AM	Member of the Year			0.0000	0.00
<a href="#">CEU</a>	SEM3/REG	12/1/2011 12:00:00 AM	Seminar Registration			0.0000	8.00
<a href="#">CEU</a>		4/15/2009 12:00:00 AM	Seminar			8.0000	8.00
<a href="#">CEU</a>	INT07/WEB	9/2/2007 12:00:00 AM	Defining a Web 2.0 Strategy			0.0000	3.00



5. Make review or make changes to the activity selected. Click OK to save; Cancel to not save changes; Delete to remove activity. (The delete function follows the setting in iMIS Desktop.)

[Contacts](#) > **Activities**

**AWARD Activity - Award**

Type	AWARD	
Date	7/25/2000	
Service Date		
Code	Good Neighbor Award	
Description	Good Neighbor Award	

Save

Cancel

Delete