

User Manual

wvActivity for iMIS

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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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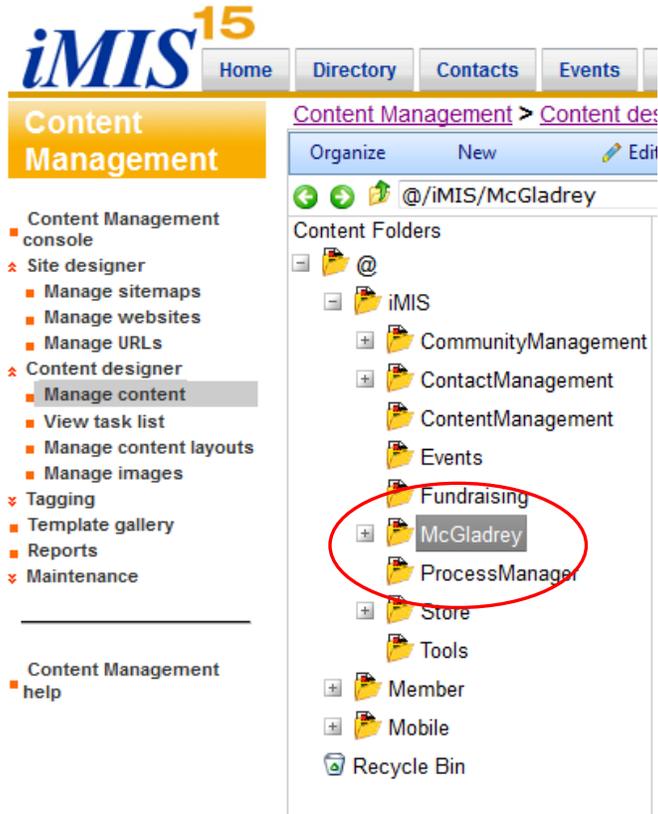


wvActivity - Configuration

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.

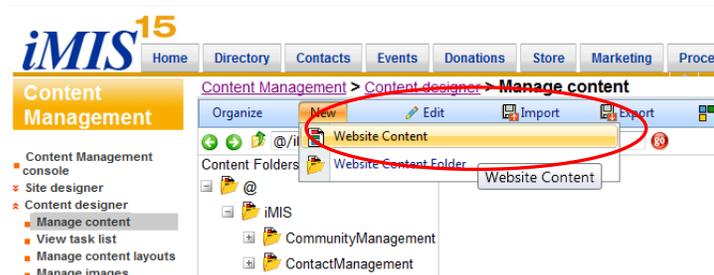
1. Create a place for the content

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

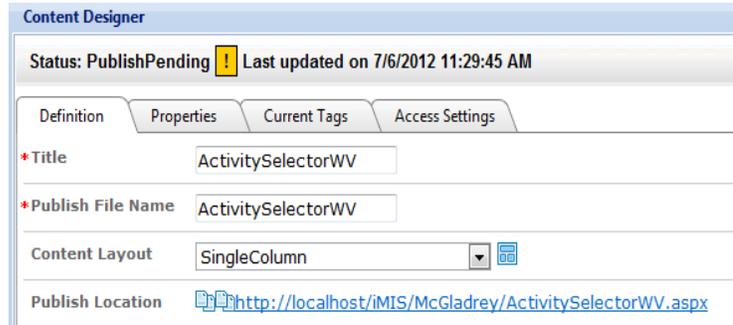


2. Create new content for the selection page of the activities

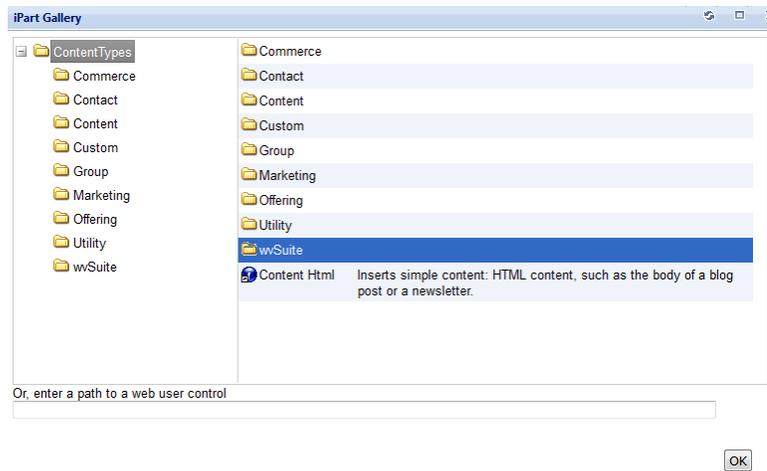
- a. Choose New
- b. Choose Website Content



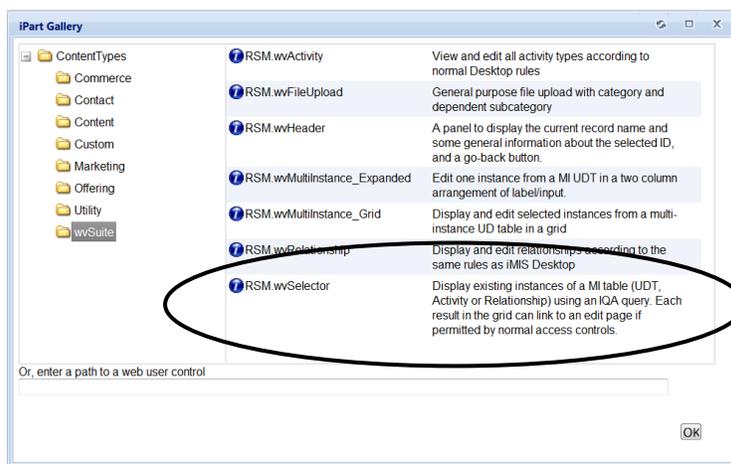
c. Title the new content ActivitySelectorWV



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:

Instructions (HTML OK):

PageCode for this page (if child of another selector):

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

Detail page

*Target URL for detail of found records:

*Child Page Type:

Creating new items

Allow "Create New" Button:

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

Create New button tooltip:

IQA Query

*IQA Query: the query definition, you must return here, save and publish.

IQA Query settings.

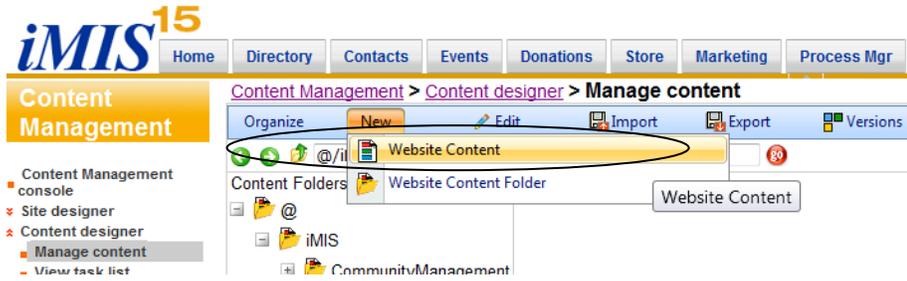
#	Display Name	Display Type	Value
1	iMIS Id Equals	Auto Assign	Selected iMIS ID

Fields	Description	Value
Name	<i>Unique Identifier of the part on the display page</i>	ActivitySelectorWV
Section Title	<i>Title on the page followed by selected name</i>	Activities for
Instructions	<i>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.</i>	
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:	<i>Page that will be navigated to on select or create new</i>	~/iMIS/McGladrey/ActivityDetails.aspx
Child Page Type:	<i>Type of Child page</i>	Activity
Allow "Create New" Button:	<i>When checked, a new item can be created in the target page.</i>	Selected
Allow user to choose selector value on "Create New":	<i>When checked, allows the user to define the selector value on the new item.</i>	Selected
Create New button tooltip:	<i>Tooltip for create new button when hovering over it</i>	
IQA Query:	<i>The path to the query that performs the selection. A sample query is provided.</i>	Click Select -> Select ActivitySelector
IQA Query settings	<i>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</i>	
Display Type		select Auto Assign
Value		Selected iMIS ID (staff website) Logged In iMIS ID (public facing website)

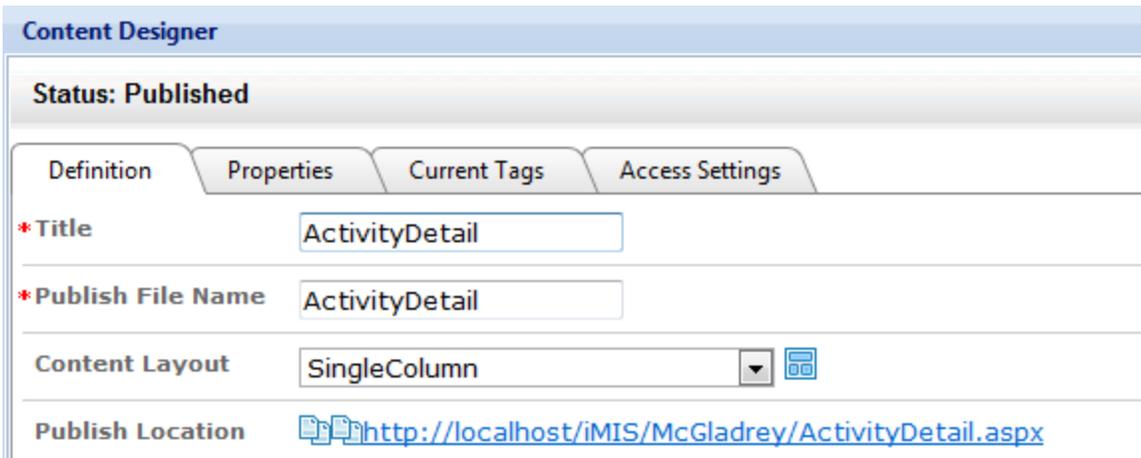


4. Create the Activity Detail page

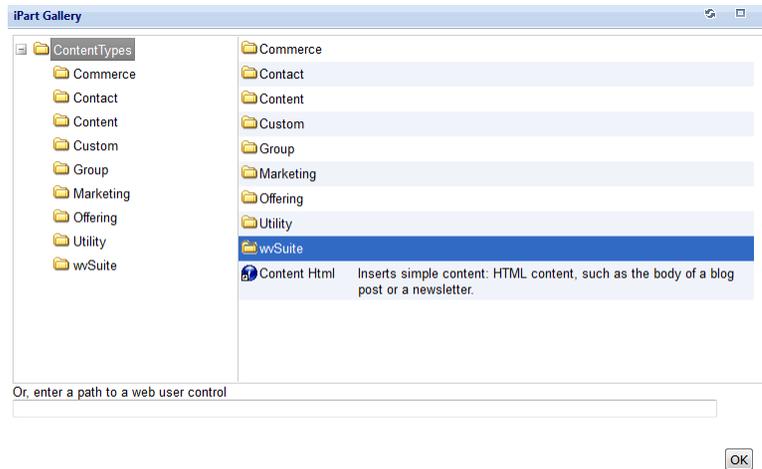
- a. Choose New
- b. Choose Website Content



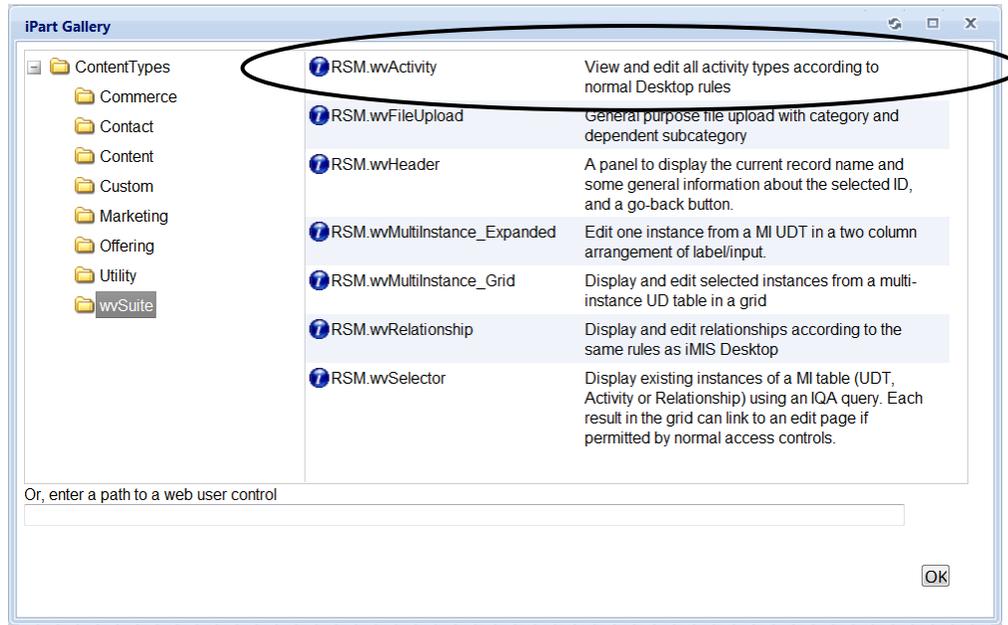
- c. Title the new content ActivityDetails



- 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

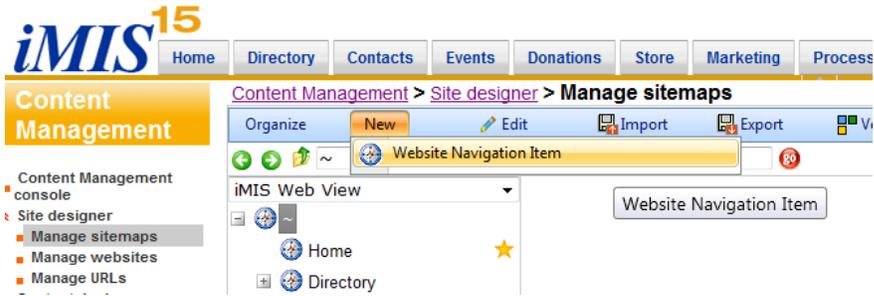
wvSuite version 1.0.6575.1090, Flavor=Release;Build=20120702.184827;Rev=6575;
Common version 1.0.6528.1000, Flavor=Release;Build=20120618.121405;Rev=6528;

Field Values:

Field	Description	Values
Name	<i>Unique Identifier of the part on the display page</i>	ActivityDetail
URL to Return To:	<i>URL where the page should return upon save/close.</i>	~/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:

* Navigation Folder Name:

Tool Tip Description:

Content or URL to Link to: [select](#) ⓘ

Or select a standard page: ⓘ

URL Parameters:

Breadcrumb Name: ⓘ

Hide on this page

Override Content Title: ⓘ

Navigation Code: ⓘ

Image URL: [select](#)

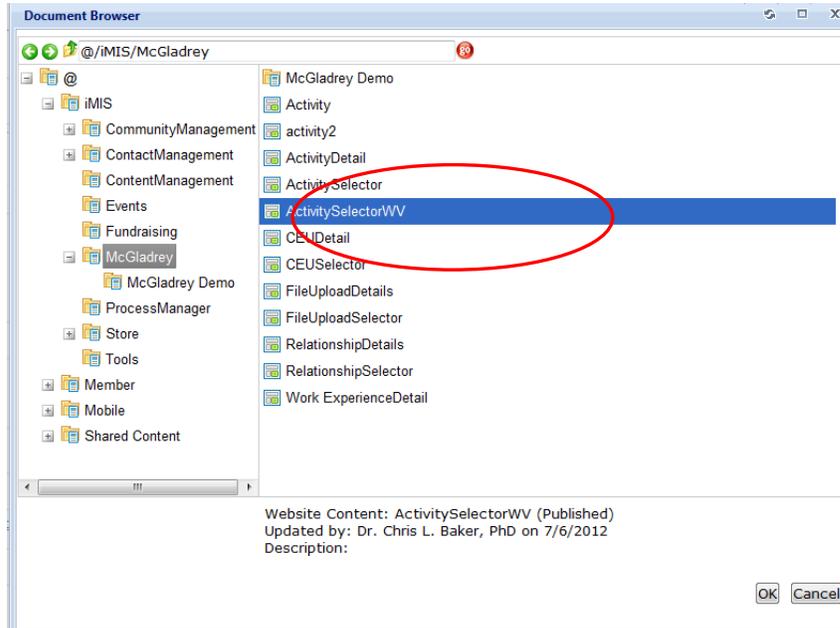
CSS Class:

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
AWARD		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 

- APPOINTMNT
- AWARD
- CEU
- COMPLAINT
- LETTER
- MONTHLYLOG
- ORDER
- RESIGN
- SPEAKER
- VOLUNTEER

wvActivity – Create New Activity

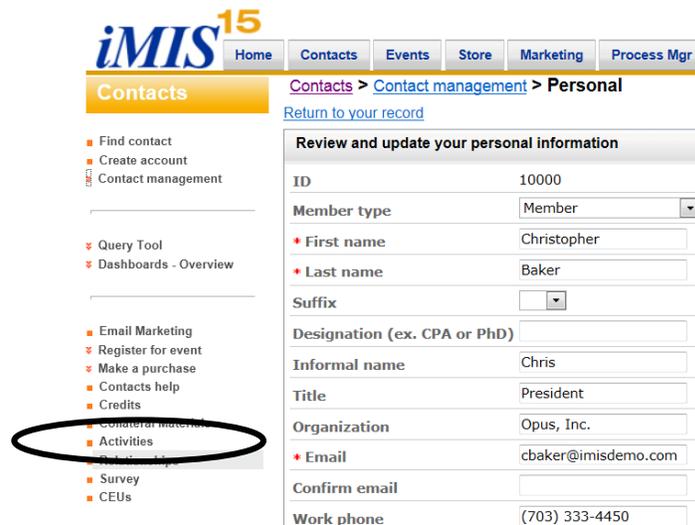
The following are steps to create a new Activity using the wvActivity iPart.

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 interface. The top navigation bar includes 'Home', 'Contacts', 'Events', 'Store', 'Marketing', and 'Process M'. The 'Contacts' tab is selected. The main content area is titled 'Contacts > Find contact'. On the left, a sidebar menu lists various options, with 'Find contact' highlighted. The main form area has 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 the form. A message below the form 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 interface. The top navigation bar includes 'Home', 'Contacts', 'Events', 'Store', 'Marketing', and 'Process Mgr'. The 'Contacts' tab is selected. The main content area is titled 'Contacts > Contact management > Personal'. A link 'Return to your record' is visible. The main form area is titled 'Review and update your personal information'. The form contains the following fields:

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	
Work phone	(703) 333-4450

On the left sidebar, the 'Activities' link is circled in black.

- Click Create New button to create a new activity.

iMIS 15 Home Contacts Events Store Marketing Process Mgr Education Communities System Setup

Contacts > Activities

Activities for Christopher Baker, Opus, Inc.

Create New

Activity Type	Product Code	Tran Date	Description	Note
SALESTRACK	VISIT	7/11/2012 12:00:00 AM	onsite visit to start relationship	text goes
REFUND		5/29/2012 12:00:00 AM	Refund Request	
ORDER	V103	5/2/2012 12:00:00 AM	Video - Excelling through Service	
ORDER	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.

Contacts > Activity Selector

Activity

Type

Date

- APPOINTMNT
- AWARD
- CEU
- COMPLAINT
- LETTER
- MONTHLYLOG
- ORDER
- RESIGN
- SPEAKER
- VOLUNTEER

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

Contacts > Activities

Award (AWARD activity)

Type

Date

Service Date

Code

Description

wvActivity – Edit Activity

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

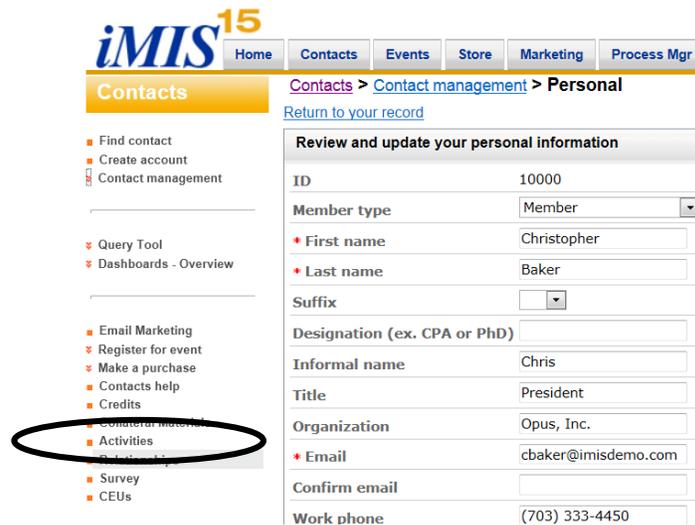
1. Choose record on which the activity resides.
 - a. From Contacts tab (or tab labeled for your records), choose Find contact.



The screenshot shows the iMIS 15 interface. At the top, there are navigation tabs: Home, Contacts, Events, Store, Marketing, and Process M. Below the tabs, the 'Contacts' section is highlighted in yellow. On the left, a sidebar menu lists various options: Find contact (selected), Create account, Contact management, Query Tool, Dashboards - Overview, Email Marketing, 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 menu set to 'Queries'. Below this are four input fields: 'Last name starts with', 'First name starts with', 'Company contains', and 'ID equals'. A 'Find' button is located at the bottom of these fields. A message below the button 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 interface. At the top, there are navigation tabs: Home, Contacts, Events, Store, Marketing, and Process Mgr. Below the tabs, the 'Contacts' section is highlighted in yellow. On the left, a sidebar menu lists various options: Find contact, Create account, Contact management, Query Tool, Dashboards - Overview, Email Marketing, Register for event, Make a purchase, Contacts help, Credits, Collateral Materials, Activities (circled in black), Survey, and CEUs. The main content area is titled 'Contacts > Contact management > Personal'. It features a 'Return to your record' link and a 'Review and update your personal information' section. The form contains the following fields: 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).

- 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

Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units
AWARD	LE	12/4/2007 12:00:00 AM	Lone Eagle Award			0.0000	0.00
AWARD	GN	7/25/2000 12:00:00 AM	Good Neighbor Award			0.0000	0.00
AWARD	MY	7/15/1996 12:00:00 AM	Member of the Year			0.0000	0.00
CEU	SEM3/REG	12/1/2011 12:00:00 AM	Seminar Registration			0.0000	8.00
CEU		4/15/2009 12:00:00 AM	Seminar			8.0000	8.00
CEU	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

Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units
AWARD	LE	12/4/2007 12:00:00 AM	Lone Eagle Award			0.0000	0.00
AWARD	GN	7/25/2000 12:00:00 AM	Good Neighbor Award			0.0000	0.00
AWARD	MY	7/15/1996 12:00:00 AM	Member of the Year			0.0000	0.00
CEU	SEM3/REG	12/1/2011 12:00:00 AM	Seminar Registration			0.0000	8.00
CEU		4/15/2009 12:00:00 AM	Seminar			8.0000	8.00
CEU	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	