

# *User Manual* *wvRelationships for iMIS*

**By:**



191 N. Wacker Dr. #1400  
Chicago, IL 60606  
[www.mcgladrey.com/imis](http://www.mcgladrey.com/imis)

# *wvRelationships* User Manual

## Version 1.0

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

Copyright © 2012 by McGladrey LLP

All rights reserved.

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

### Notice

This user guide and the software it describes are furnished under a license agreement. The software may be used and copied only in accordance with the terms of the agreement. No part may be copied, transmitted, or reproduced in any form without written permission from McGladrey LLP.

McGladrey LLP and the program authors have no liability to the purchaser or any other entity, except as provided in the license agreement permitting your use of this software, with respect to any liability, loss, damage caused, directly or indirectly, by this software, including but not limited to any interruptions in service, loss of business, anticipatory profits, or consequential damages resulting from the use of or operation of this software.

### Trademarks

*iMIS* is a trademark of Advanced Solutions International, Inc. All products mentioned herein are registered trademarks of their respective owners.

McGladrey LLP  
191 N. Wacker Drive Suite 1400  
Chicago, IL 60600





# Table of Contents

- wvRelationships - Configuration..... 5
- Example of finished wvRelationship:..... 13
- wvRelationship– Create New Relationship ..... 14
- wvRelationship – Edit Relationship ..... 18

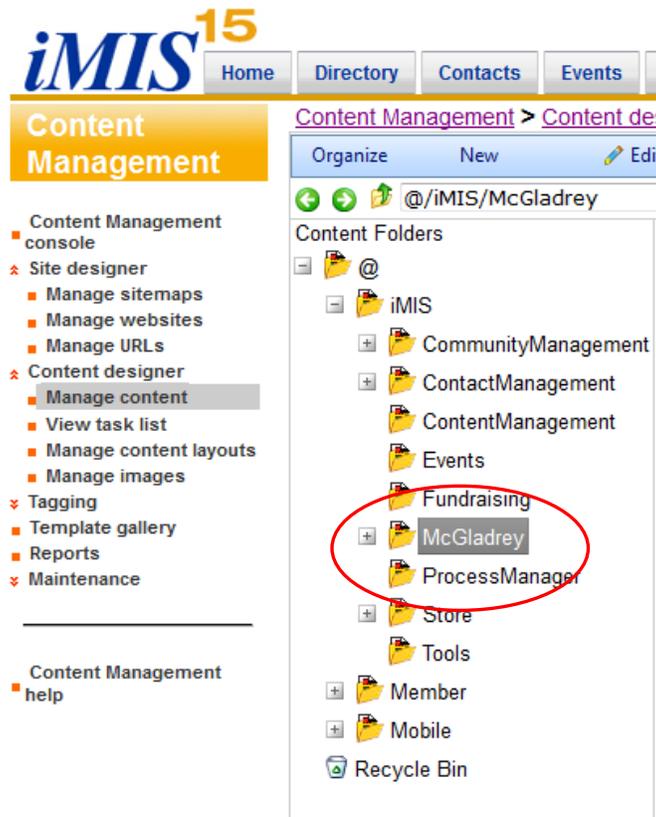


## wvRelationships - Configuration

The following are steps to configure the Relationship 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.

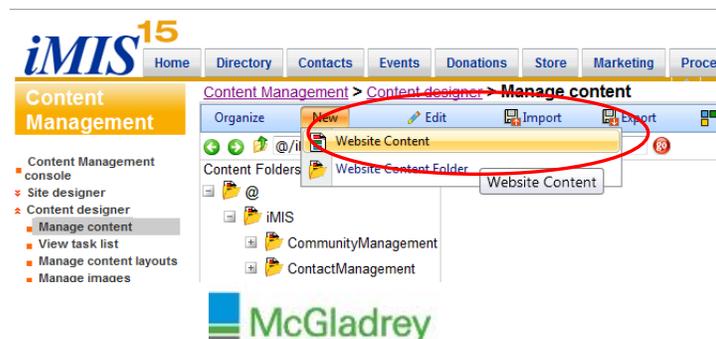
### 1. Create a place for the content

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



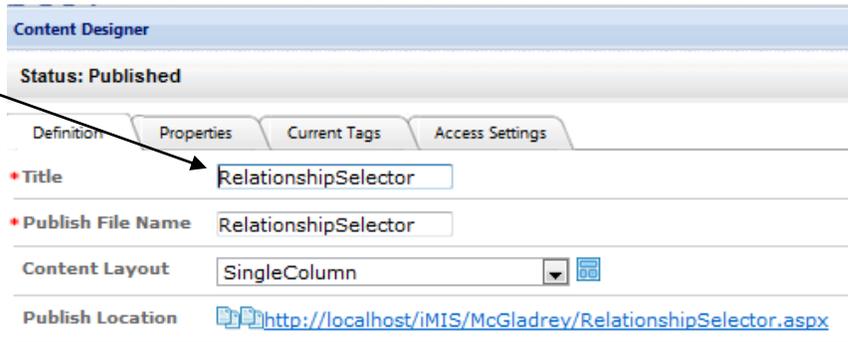
### 2. Create new content for the selection page of the activities

- a. Choose New
- b. Choose Website Content

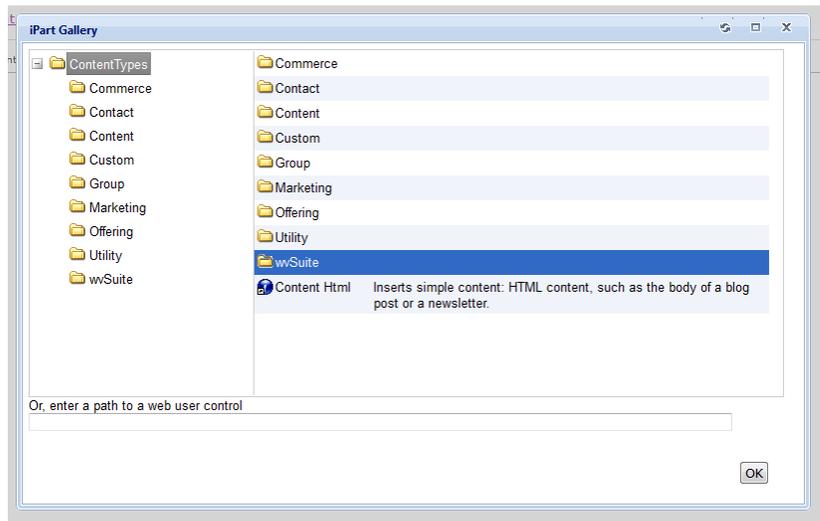


c. Title the new content RelationshipSelector

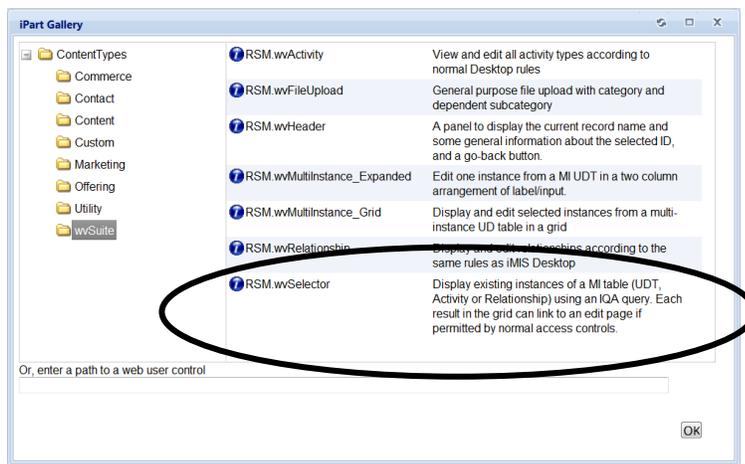
You can title this as you see fit. It will need to be referenced in Step6c



d. Click add content and select the wvSuite folder



e. Choose the RSM.wvSelector in the wvSuite directory



### 3. Configure the RSM.wvSelector ipart

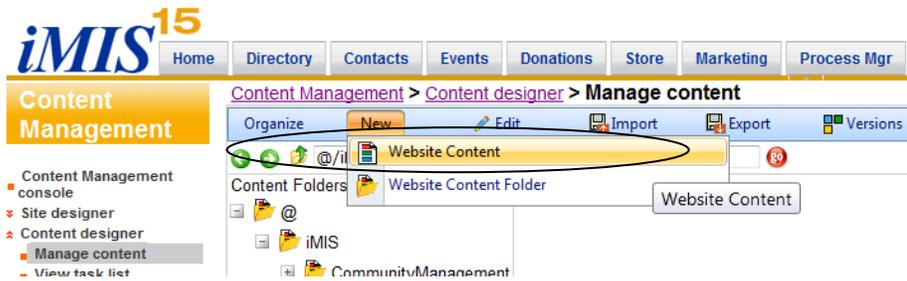
#	Display Name	Display Type	Value
1	iMIS Id Equals	Auto Assign	Selected iMIS ID

Field Name:	Description	Value
Name	<i>Unique Identifier of the part on the display page</i>	RelationshipSelector
Section Title	<i>Title on the page followed by selected name</i>	Relationships for
Instructions	<i>Instructions are displayed below the title. The instructions should give the user some information on how to use the feature or what is expected.</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 upon select or create new</i>	~/iMIS/McGladrey/RelationshipDetails.aspx
Child Page Type:	<i>Type of Child page</i>	Relationships
Allow "Create New" Button:	<i>When checked, a new item can be created in the target page by the user.</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>Select the IQA created in Step 3</i>	Click Select -> Select RelationshipSelector
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	<i>These are the filters for the query. When using iMIS ID, uses Selected ID</i>	select Auto Assign
Value		Selected iMIS ID

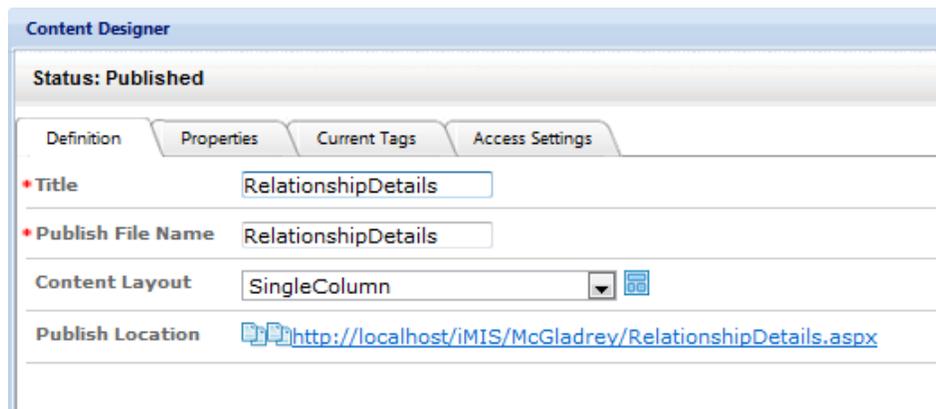


#### 4. Create the Relationship Detail page

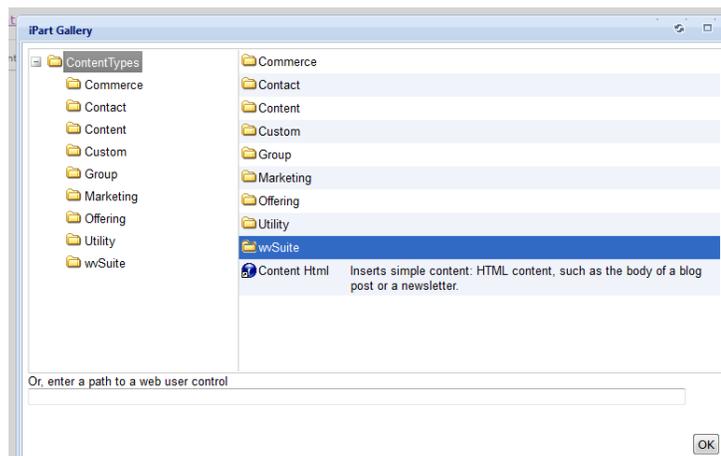
- a. Choose New
- b. Choose Website Content



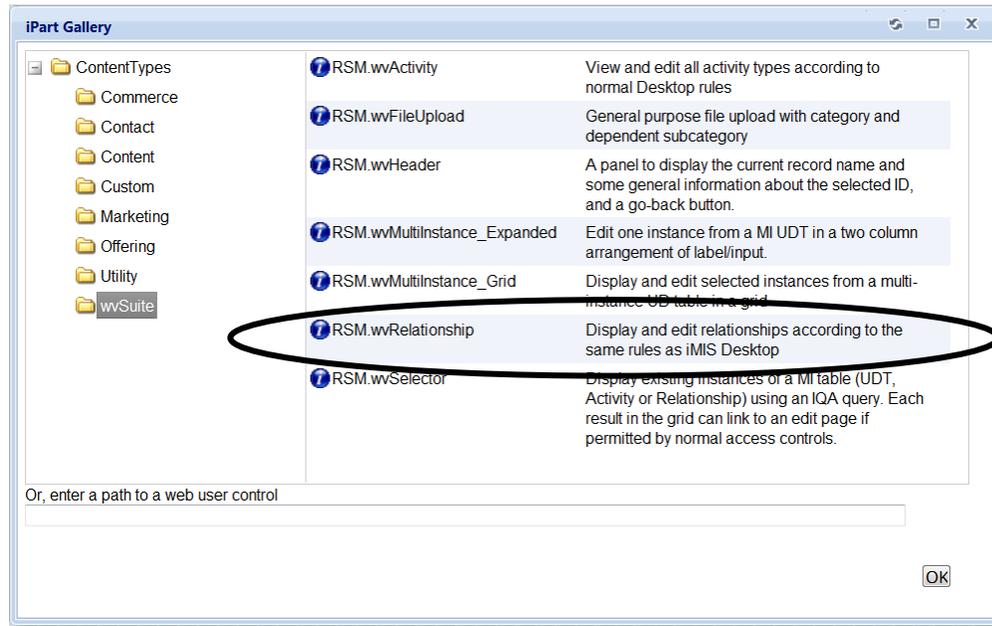
- c. Title the new content ActivityDetails



- d. Click add content and select the wvSuite folder



e. Choose the RSM.wvRelationship in the wvSuite directory



## 5. Configure RSM.wvRelationship

This can be selected if users are allowed to create a relationship without a target ID. These types of relationships are less useful for reporting, so many organizations teach their staff not to create them

**Configure iPart - RSM.wvRelationship**

\* **Name**

---

**wvRelationship configuration**

---

**Allow One Sided Relationships:**

---

\* **URL to Return To:**

---

\* **Folder containing IQA queries for target ID:**

---

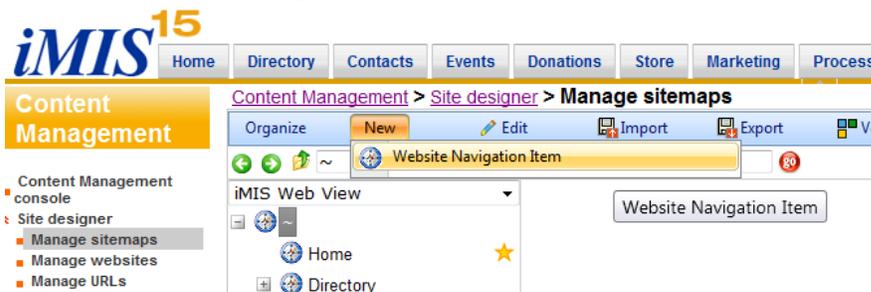
wvSuite version 1.0.6575.1090, Flavor=Release;Build=20120702.184827;Rev=6575;  
Common version 1.0.6528.1000, Flavor=Release;Build=20120618.121405;Rev=6528;

This property can be left blank, in which case it will use the global setting (See step 7)

Field Values:	Description	Value
Name	You can name this as you see fit	RelationshipDetail
URL to Return To:		~/iMIS/McGladrey/RelationshipSelector.aspx
Folder containing IQA queries for Target ID:	This is the directory location of the queries which are to be used for the selecting the ID of the records involved in the relationship.	

## 6. Add a navigation item for the Relationship selection information.

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



Status: Published

Properties    Workflow Management    Options    Access Settings

Navigation Link Text: AddRelationship

Navigation Folder Name: AddRelationship

Tool Tip Description:

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

Or select a standard page: (None) ⓘ

URL Parameters:

Breadcrumb Name: AddRelationship ⓘ

Hide on this page

Override Content Title:  ⓘ

Navigation Code:  ⓘ

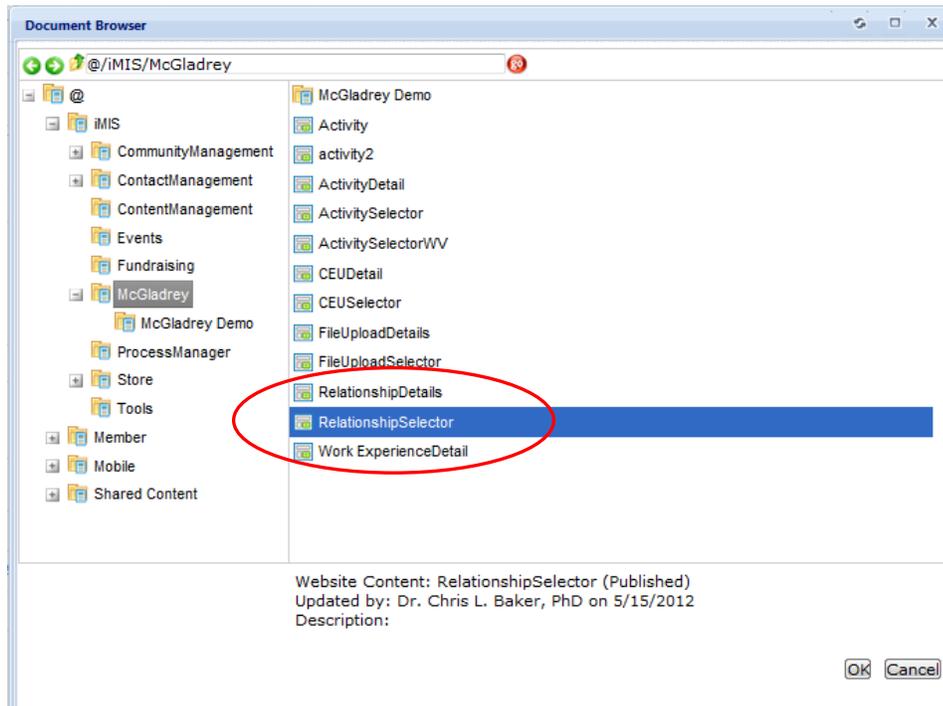
Image URL:  [select](#)

CSS Class:

Folder containing template gallery content

Inherit from parent

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



- d. **Move the navigation item to your chosen location by dragging and dropping to preferred location in left navigation area.**
- e. **Publish the navigation item.**

## 7. System Setup:

These settings can be found under System Setup->RSM Configuration

Default folder for FindID searches in wvMultilInstance and wvRelationship (RSM.wvUtility.FindIDFolder)



## Example of finished wvRelationship:

### Selector page:

RelationshipSelector Carol Hamilton, Foundation Support Systems

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
MB	195	ALLEN, CHOCO		M				
RM	204	RAMADAS, DAS		MB				
SALES	122	GOODENZ, JANE	Spybreakers Ltd.	PROSPECT				

### Detail Page:

Relationship Detail

Target Jane Goodenz, Spybreakers Ltd.

\* Relationship Prospect

\* Reciprocal Contract  
Contractor To  
daughter of  
father of

Title Gift Buyer

Functional Title Institution Served By

From Knows  
Managed  
Managed By

Thru Member  
mother of

Group Code Member Relations Rep  
Member Relations Rep To  
Novelty Buyer

Note officer of  
Primary Institution Served  
Practices At  
parent of  
Practitioner  
Prospect

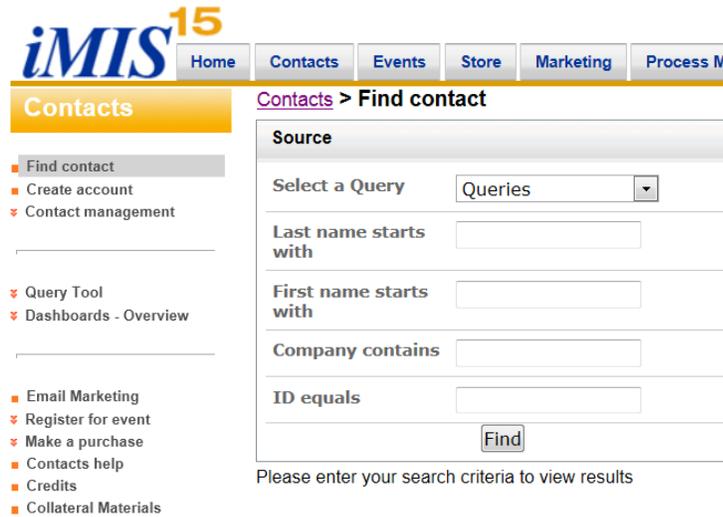
Date Added 9/12/2005 Last Updated (none) By MANAGER

Save Cancel Delete

## wvRelationship– Create New Relationship

The following are steps to create a new relationship using the wvRelationship iPart.

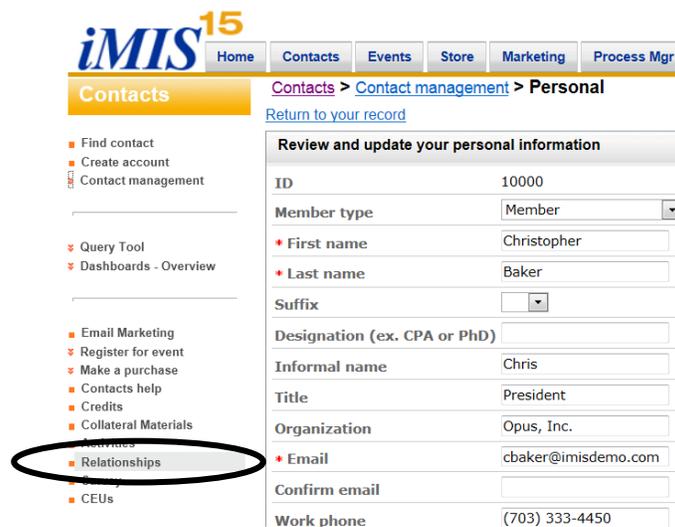
1. Choose record on which the relationship is to originate.
  - a. From Contacts tab (or tab labeled for your records), choose Find contact.



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 are Email Marketing, Register for event, Make a purchase, Contacts help, Credits, and Collateral Materials. The main content area is titled 'Contacts > Find contact' and contains a search form with the following fields: 'Select a Query' (dropdown menu showing 'Queries'), '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, it 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 wvRelationship link from the navigation. (In this example, it is called Relationships. 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 are Email Marketing, Register for event, Make a purchase, Contacts help, Credits, Collateral Materials, Relationships (circled in black), and CEUs. The main content area is titled 'Contacts > Contact management > Personal' and contains a form titled 'Review and update your personal information'. The form has 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).

3. Click Create New button to create a new relationship.

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

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



Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
<a href="#">CHILD</a>	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
<a href="#">KEY</a>	193		Opus, Inc.	KEY				
<a href="#">KNOWS</a>	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
<a href="#">KNOWS</a>	10049	CASSIDY, SEYMOUR		KNOWS				
<a href="#">PARENT</a>	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
<a href="#">RB</a>	121	BONDLUM, JAMES	Spybreakers Ltd.	BOD				

4. A blank relationship screen now appears. Click on the magnifying glass to obtain the correct record for the relationship.

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

**Relationship Detail**

Target 

\*Relationship

\*Reciprocal

Group Code

Note

Date Added    Last Updated    By

- Find a record using the queries available in the drop down list. Fill out the query's parameters and click the Find button to retrieve the desired record.

[Records](#) > [Record management](#) > **Relationships**

Relationships for Donald McDonald Home Chapter of Chapter 8 N

**Search Types** by ID

- \*iMIS ID equals
- by ID
- by Last Name
- by Name
- by RMHC Region
- by State\_Province
- for all records in a specific city
- for Individuals in My Chapter
- for My Chapter
- for My Programs and Related Organizations
- for non RMHC Organization or Company
- for non-Chapter Individuals
- Orgs, Programs and Other Types of Companies (No Individuals)

Results

Ok Cancel

Date Added Last Updated By

Save Cancel Delete

[Records](#) > [Record management](#) > **Relationships**

Country: (Any)

State/Province: (US and Canada only)  
Indiana

Region: (Any)

Record Type: (Any)

Find

Results

15853 - Parkview Hospital 2200 Randallia Dr. Fort Wayne, Indiana 46805

Ok Cancel

6. Highlight the correct record in the Results area and click OK.

Records > Record management > Relationships

Country:  
(Any) [v]

State/Province:  
(US and Canada only)  
Indiana [v]

Region  
(Any) [v]

Record Type:  
(Any) [v]

[Find]

Results  
15853 - Parkview Hospital 2200 Randallia Dr. Fort Wayne, Indiana 46805 [v]

[Ok] [Cancel]

7. Choose relationship type from drop down list of relationships.

**iMIS<sup>15</sup>** Home Directory **Contacts** Events Donations Store Marketing

**Contacts** Contacts > AddRelationship

Relationship Detail

Target Jane Goodenz, Spybreakers Ltd. [v]

\*Relationship Prospect [v]

\*Reciprocal Contract  
Contractor To  
daughter of  
father of  
Gift Buyer

Title Institution Served By

From Knows  
Managed  
Managed By

Thru Member  
mother of  
Member Relations Rep  
Member Relations Rep To  
Novelty Buyer  
officer of  
Primary Institution Served  
Practices At  
parent of  
Practitioner

Note Prospect

Date Added 9/12/2005 Last Updated (none) By MANAGER

[Save] [Cancel] [Delete]

8. Populate fields as appropriate. Click Save to keep the new relationship. Click cancel to discard.

## wvRelationship – Edit Relationship

The following are steps to edit an existing relationship using the wvRelationship iPart.

1. Choose record on which the relationship 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 'Contacts' tab is active. On the left, a sidebar menu lists various options, including 'Find contact', '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' and contains a search form. The form has a 'Source' section with a 'Select a Query' dropdown menu 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 located 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 wvRelationship link from the navigation. (In this example, it is called Relationships. 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 active. On the left, a sidebar menu lists various options, including 'Find contact', 'Create account', 'Contact management', 'Query Tool', 'Dashboards - Overview', 'Email Marketing', 'Register for event', 'Make a purchase', 'Contacts help', 'Credits', 'Collateral Materials', 'Relationships', and 'CEUs'. The 'Relationships' link is circled in black. The main content area is titled 'Contacts > Contact management > Personal' and contains a form for 'Review and update your personal information'. The form includes 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 relationship you wish to edit from the list of previously created relationships. To assist in finding the relationship, 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 > Relationships**

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

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
<a href="#">CHILD</a>	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
<a href="#">KEY</a>	193		Opus, Inc.	KEY				
<a href="#">KNOWS</a>	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
<a href="#">KNOWS</a>	10049	CASSIDY, SEYMOUR		KNOWS				
<a href="#">PARENT</a>	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
<a href="#">RB</a>	121	BONDLUM, JAMES	Spybreakers Ltd.	BOD				

- Click the link in the Type column of the relationship to edit.

**Contacts > Relationships**

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

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
<a href="#">CHILD</a>	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
<a href="#">KEY</a>	193		Opus, Inc.	KEY				
<a href="#">KNOWS</a>	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
<a href="#">KNOWS</a>	10049	CASSIDY, SEYMOUR		KNOWS				
<a href="#">PARENT</a>	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
<a href="#">RB</a>	121	BONDLUM, JAMES	Spybreakers Ltd.	BOD				

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

**Contacts > Relationships**

---

**Relationship Detail**

Target	Seymour Cassidy	
*Relationship	Knows	▼
*Reciprocal	Knows	▼
Title		▼
Functional Title		▼
Group Code		▼
Note	Friends from college. Were in same fraternity.	

Date Added 9/10/2002 Last Updated (none) By JOY