



# About me

- Director, Technology Solutions 
- Implementing iMIS since 1993
- We solve the toughest problems
- Full spectrum of services
  - Packaged solutions, Sharepoint, networks, virtualization, SAS-70 Level 3 hosting, business consulting
- National iMIS presence, resources worldwide

<http://mcgladrey.com/imis>



# Web View Suite (wvSuite)

- iParts to bring desktop iMIS capabilities to the web views
- Designed to match or exceed desktop features



# Web View Suite

- wvActivity
- wvFileUpload
- wvRelationships
- wvMultiInstance



# wvActivity

- Grid view of existing activities + "Create New"
- Sort or filter by any column
- Controlled by IQA query - can be customized

## Activities for Family House Society

Select an activity to edit or click "Create New" to add

Create New

Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units
<input type="text" value=""/> ▾		<input type="text" value=""/> ▾			<input type="text" value=""/> ▾	<input type="text" value=""/> ▾	<input type="text" value=""/> ▾
<a href="#">DUES</a>	DUES	4/15/2010 12:00:00 AM			10/12/3120 12:00:00 AM	50	0.00
<a href="#">CAP_CMP</a>		1/22/2010 12:00:00 AM			2/1/2010 12:00:00 AM	0.0000	0.00
<a href="#">AWARD</a>	CM	1/7/2010 12:00:00 AM				0.0000	0.00
<a href="#">SITE_VISIT</a>	DA	1/7/2010 12:00:00 AM		HNW volunteers brought friends for a tour.		0.0000	0.00
<a href="#">UPLOAD</a>	RCM	1/7/2010 12:00:00 AM				0.0000	0.00



# wvActivity

- Fields, prompts, lookups are the same as iMIS

[Records](#) > [Records Management](#) > Activity Editor

Activity for Family House Society Close

---

**Activity**

Type	AWARD
Date	1/7/2010
Award Date	10/31/2009
Kind	Chapter of the Month
Description	
Acknowledgement	Recognition

Save Cancel Delete



# wvActivity

- Can suppress certain activity types normally displayed
- No activity attachments, by design.
  - We made a better way



# wvFileUpload

- Grid view of existing uploads
- Sort or filter by any column
- Controlled by IQA query

[Records](#) > [Records Management](#) > [File Uploads](#)

## Uploaded Files for [REDACTED] of Greater Chattanooga, Inc.

Please click one of the Uploaded Files below to View/Edit or press Create New to

Upload a New File

 Create New

Date Uploaded	Category	Attachment Type	Effective Year	Description	Uploaded File
<a href="#">1/7/2010 12:00:00 AM</a>	FIN	FIN.U01800	2009	IRS Form 990	Winter.jpg
<a href="#">1/7/2010 12:00:00 AM</a>	UQR	UQR.U02200	2009	4th Qtr	Sunset.jpg

This area is to be used to upload documents, logos and other information requested by [REDACTED]. The maximum size of your upload file should not be greater than 1 GB. All information is only visible to your Organization and [REDACTED]. It is not for publication to other Chapters.



# wvFileUpload

File Upload for ██████ of Greater Chattanooga, Inc.

Close

This area is to be used to upload documents, logos and other information requested by ██████. The maximum size of your upload file should not be greater than 1 GB. All information is only visible to your Organization and ██████. It is not for publication to other Chapters. This area is not intended for uploading of videos or other large items. Please use the [FTP site](#) to do this.

File Upload	
Date	<input type="text" value="4/19/2010"/>
*Category	<input type="text" value="Communications &amp; Marketing"/>
*Attachment Type	<input type="text" value="Approved Chapter Logos"/>
*Effective Year	<input type="text" value="2010"/>
Description	<input type="text" value="Blue logo"/>
*Attachment	<input type="text" value="C:\Data\RSMLogo-Blue."/> <input type="button" value="Browse..."/>

Upload

Cancel

Delete



# wvFileUpload

- Attachment Type choices depend on Category
- Files stored in folders based on year, category, attach type and ID
- Saves Activity with file details
- File stored on web server/network



# wvRelationships

- Grid of existing rows + create new
- Sort or filter, modify query

## Choose Relationships for Family House Society

Please click one of the relationships below or press Create New for a new relationship

 Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
<a href="#">HIR</a>	10480		American Family Children's Hospital	HIR	Activ		1/1/2010 12:00:00 AM	12/31/2010 12:00:00 AM
<a href="#">KCPC</a>	13632	GUTIERREZ, ANDRES	Family House Society	KCPC	A		1/1/2010 12:00:00 AM	
<a href="#">RO</a>	10625		Local Independent Charities					



# wvRelationships

- Reciprocal type set automatically
- Dates, title, group code
- Find target, or just type a name

Relationship for Family House Society

Relationship Detail

Target

\*Relationship

\*Reciprocal

From

Thru

Group Code

Note

Date Added 02/16/2010 Last Updated 04/15/2010 By MANAGER



# wvRelationships

- Search using IQA queries from a folder
  - Parameters!
- Folder can be same as "Find Contacts" or custom

Search Types Orgs, Programs and Other Types of Comp ▾

Org or Program name starts with

---

iMIS ID equals

---

Record Type  
Healthcare Inst ⋮

---

State/Province equals  
(Any) ⋮

Results

15091 - 7763 Lookout Drive Chattanooga, TN 60601 lookoutHI@yahoo.	▲
10460 - Alberta Children's Hospital Alberta Children's Hospital	☰
10736 - All Children's Hospital All Children's Hospital	
10480 - American Family Children's Hospital American Family Children's	
10678 - Anne Elizabeth Shenherd Home Anne Elizabeth Shenherd Home	



# wvMultiInstance

- Edit multi-instance UDTs on the web, one at a time or in combinations
- Enhanced prompts, descriptions, tooltips
- Find ID
- Field-level security for view, edit
- Calculated fields



# wvMultiInstance

- Simple mode - one table at a time
- Edit inline in the grid

**Globally Developed Donor Contributions**

		Global Donor Organiz...	Participated in Volu...
		La-Z-Boy	No
		Telus Community Connections	Not Applicable
		The Coca-Cola Company	Not Applicable

  

Global Donor Organization Name:	The Coca-Cola Company
Participated in Volunteer Activities for the Chapter:	Not Applicable
<b>Choose from the following products/services received. (Check all that apply)</b>	
Appliances/Electronics:	<input type="checkbox"/>
Air Travel:	<input type="checkbox"/>
Beds:	<input type="checkbox"/>



# wvMultiInstance

- Enhanced mode - summary to detail

[Records](#) > [Records Management](#) > [Scholarships](#) > [U.S. Scholarship Participation](#)

## Choose U.S. Scholarship Part

Please click one of the open years below

New Year:

	Year	Total Amount of Funds Raised
<a href="#">select</a>	2009	25512
<a href="#">select</a>	2010	0

## U.S. Scholarship Information

Enter the scholarship grant total in the first field, then the subtotals of each scholarship Chapter for the year. Remember the total should match the sum of each scholarship

Total Amount of Funds Raised	<input type="text" value="25,512"/>
Amount Allocated to African American Achievers Program	<input type="text" value="10,000"/>
Amount Allocated to Asia Program	<input type="text" value="10,000"/>
Amount Allocated to Hacer Program	<input type="text" value="5,000"/>
Amount Allocated to Scholar Program	<input type="text" value="512"/>
How were funds raised to support the U.S. Scholarship Program	<input type="text" value="Telemarketing, direct mail"/>



# wvMultiInstance

- Group mode - multiple related tables
- "Simple" and "Enhanced" iParts from many tables
- Panels all relate to the same "thing"
  - Annual report with detail inside
  - Application with one or more references

Annual Program Information for Family House Society

Annual Program Information

Year	2009
Currency	USD

Chapter Information

The following two fields request data for the number of donors in your Chapter's area.

# of donors in your Chapter's service area 

# of donors who actively participate in your Chapter activities

Please enter the rest of the general information about your Chapter.

\* Count of Chapter volunteers

Organizational Assessment Uploaded 

Save S

Annual Operating Budget Information

		Operating Budget For...	If other operating b...	Annual Amount
		Grants		134,000
		Grants		10,000



# wvSuite

- Configured using standard iMIS
- Uses iBO where applicable
- Works in 1700 template
- iMIS 15.1.2 or later



## More information

- See me at this conference
- See live demo
  
- [brenda.barnhart@mcgladrey.com](mailto:brenda.barnhart@mcgladrey.com)
- 312.782.2124