




About me

- Director, Technology Solutions  McGladrey
- 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"/> ▼		<input type="text"/>  ▼			<input type="text"/>  ▼	<input type="text"/> ▼	<input type="text"/> ▼
DUES	DUES	4/15/2010 12:00:00 AM			10/12/3120 12:00:00 AM	50	0.00
CAP_CMP		1/22/2010 12:00:00 AM			2/1/2010 12:00:00 AM	0.0000	0.00
AWARD	CM	1/7/2010 12:00:00 AM				0.0000	0.00
SITE_VISIT	DA	1/7/2010 12:00:00 AM		HNW volunteers brought friends for a tour.		0.0000	0.00
UPLOAD	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



wwActivity

- 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
1/7/2010 12:00:00 AM	FIN	FIN.U01800	2009	IRS Form 990	Winter.jpg
1/7/2010 12:00:00 AM	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 [REDACTED] of Greater Chattanooga, Inc.

Close

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. This area is not intended for uploading of videos or other large items. Please use the [FTP site](#) to do this.

File Upload

Date

4/19/2010



*Category

Communications & Marketing

*Attachment Type

Approved Chapter Logos

*Effective Year

2010

Description

Blue logo

*Attachment

C:\Data\RSMLogo-Blue.

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
HIR	10480	GUTIERREZ, ANDRES	American Family Children's Hospital	HIR	Activ		1/1/2010 12:00:00 AM	12/31/2010 12:00:00 AM
KCPC	13632		Family House Society	KCPC	A		1/1/2010 12:00:00 AM	
RO	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	Andres Gutierrez	
*Relationship	Key Contact/Primary Contact	
*Reciprocal	Key Contact/Primary Contact	
From	1/1/2010	
Thru		
Group Code	Contact	
Note	<div>Notes fields</div>	

Date Added

02/16/2010

Last Updated

04/15/2010

By

MANAGER

Save

Cancel

Delete



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) ...

Filter

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:

Participated in Volunteer Activities for the Chapter:

Choose from the following products/services received. (Check all that apply)

Appliances/Electronics: ☐

Air Travel: ☐

Beds: ☐



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


 Create New

New Year:

	Year	Total Amount of Funds Raised
select	2009	25512
select	2010	0

U.S. Scholarship Information

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

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"/>



wvMultilInstance

- 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 	<input type="text" value="1,007"/>
# of donors who actively participate in your Chapter activities	<input type="text" value="0"/>

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

* Count of Chapter volunteers	<input type="text" value="3,209"/>
Organizational Assessment Uploaded 	<input checked="" type="checkbox"/>

Save

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
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