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

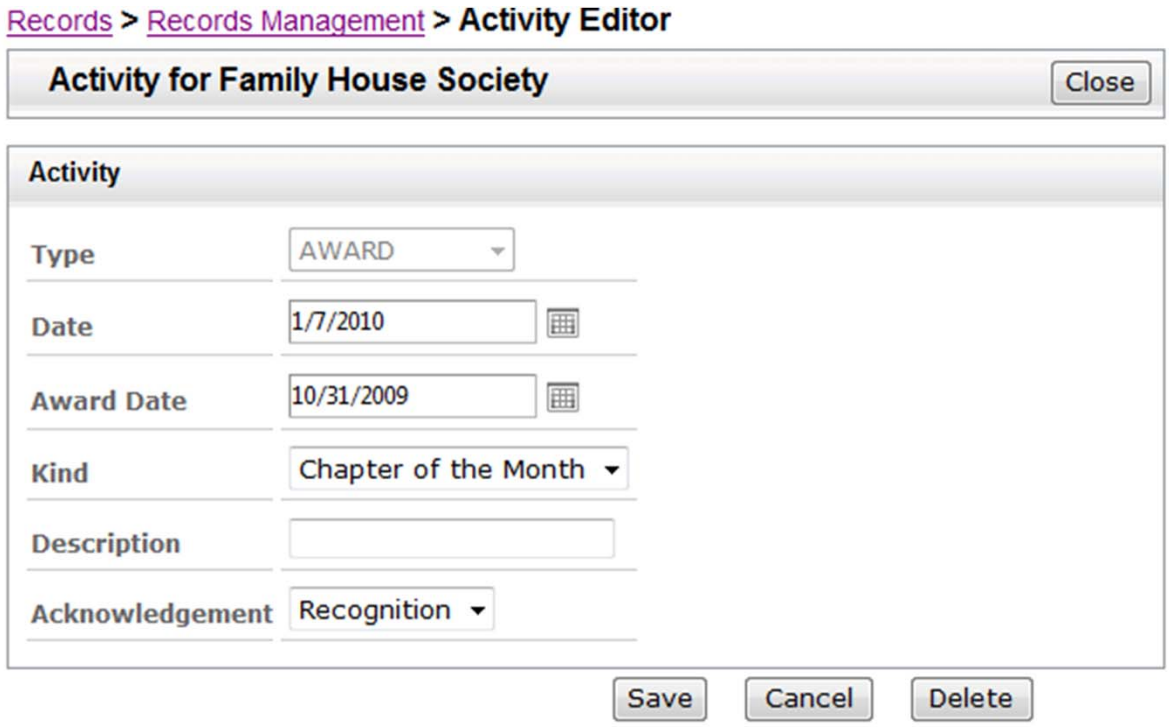
Select an activity to edit or click "Create New" to add

Create New

Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units
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

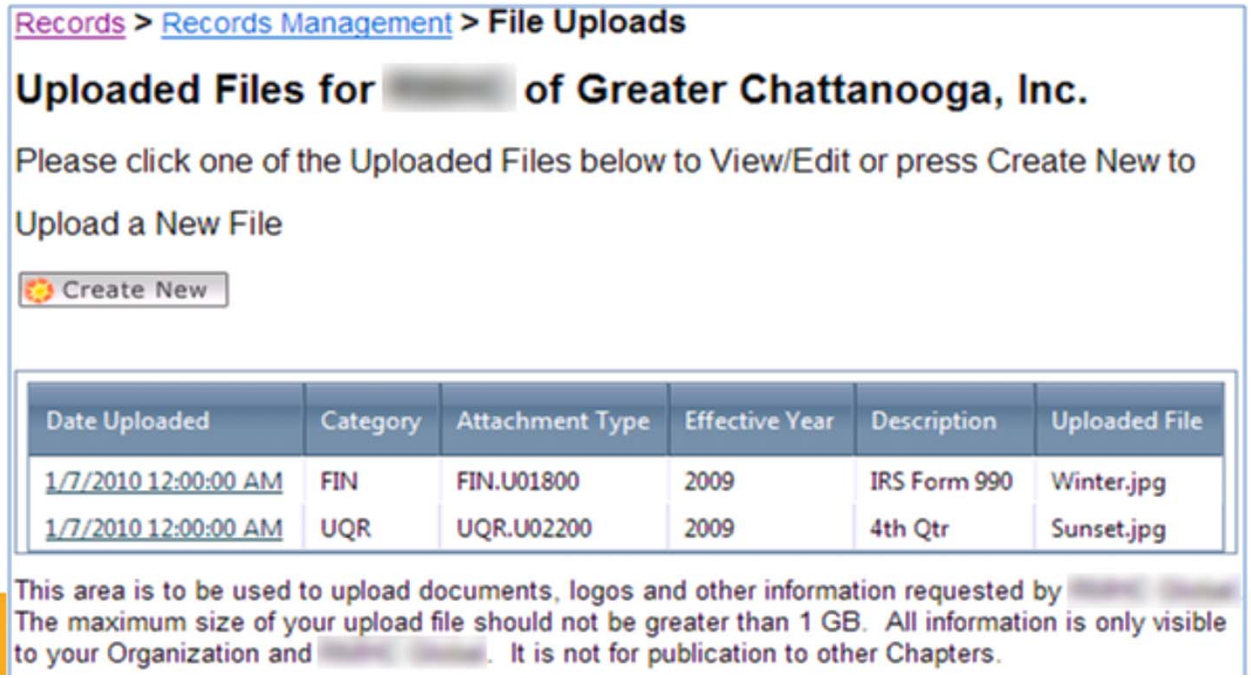


wvActivity

- 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.

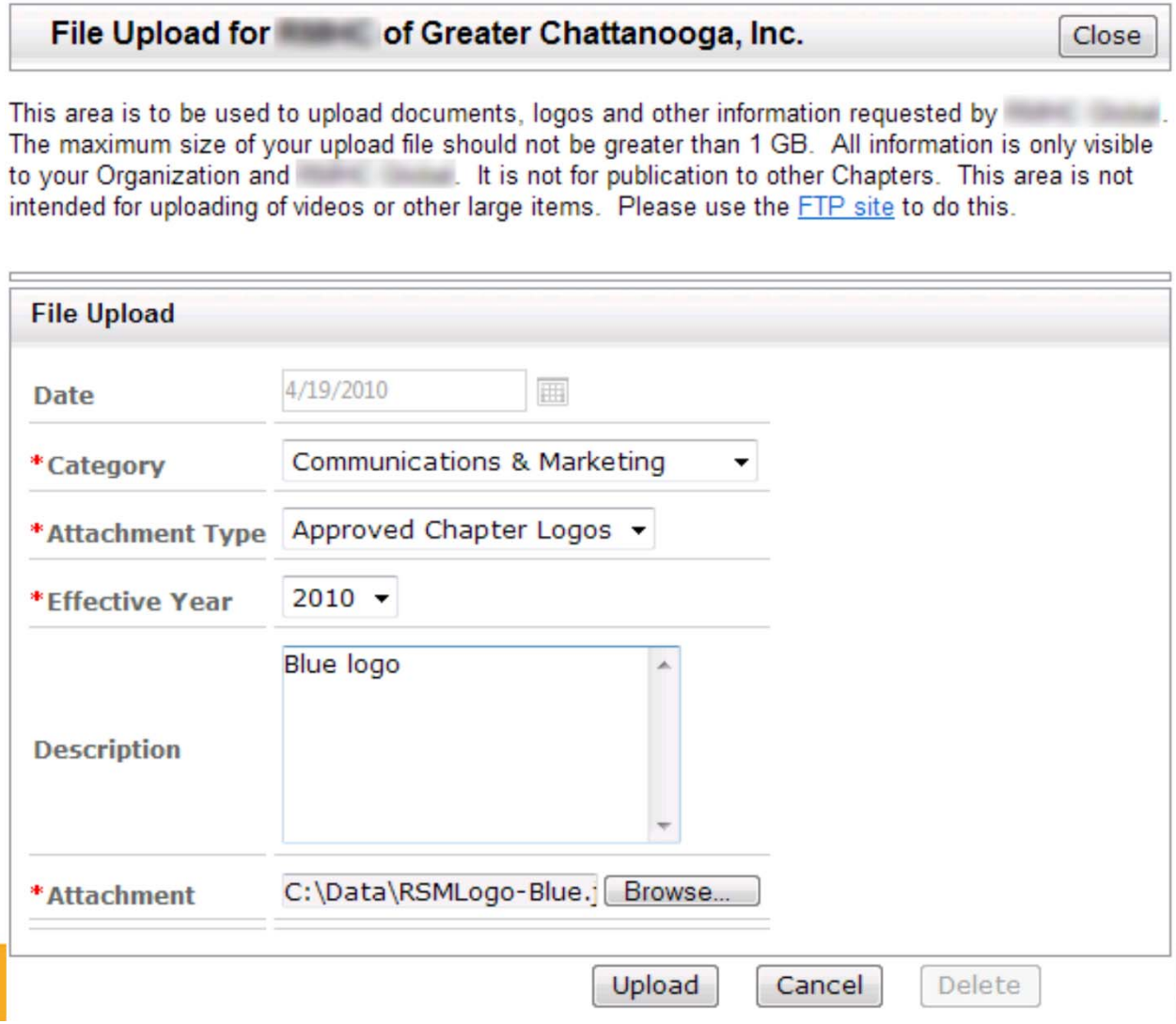
Please click one of the Uploaded Files below to View/Edit or press Create New to Upload a New File

Create New

Date Uploaded	Category	Attachment Type	Effective Year	Description	Uploaded File
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



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

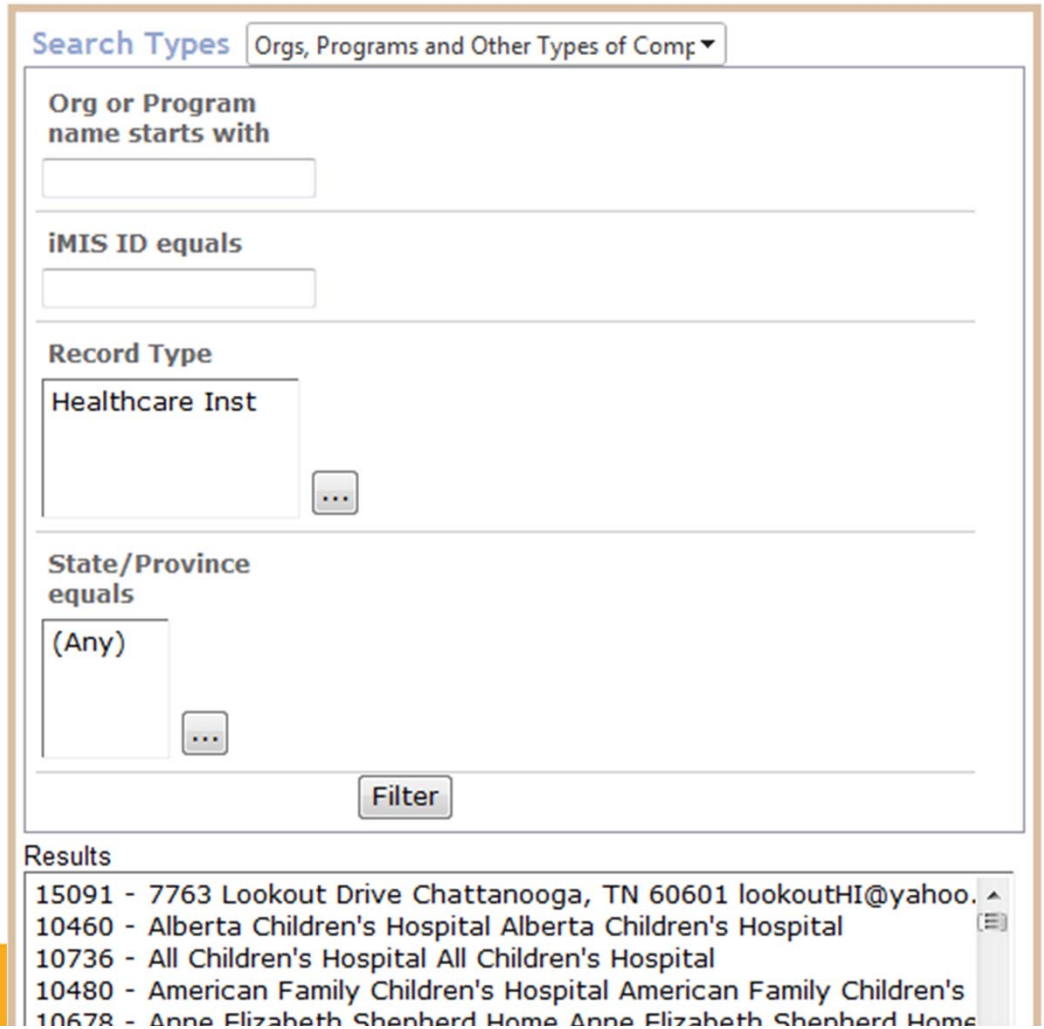
Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
HIR	10480		American Family Children's Hospital	HIR	Activ		1/1/2010 12:00:00 AM	12/31/2010 12:00:00 AM
KCPC	13632	GUTIERREZ, ANDRES	Family House Society	KCPC	A		1/1/2010 12:00:00 AM	
RO	10625		Local Independent Charities					

wvRelationships

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

wvRelationships

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

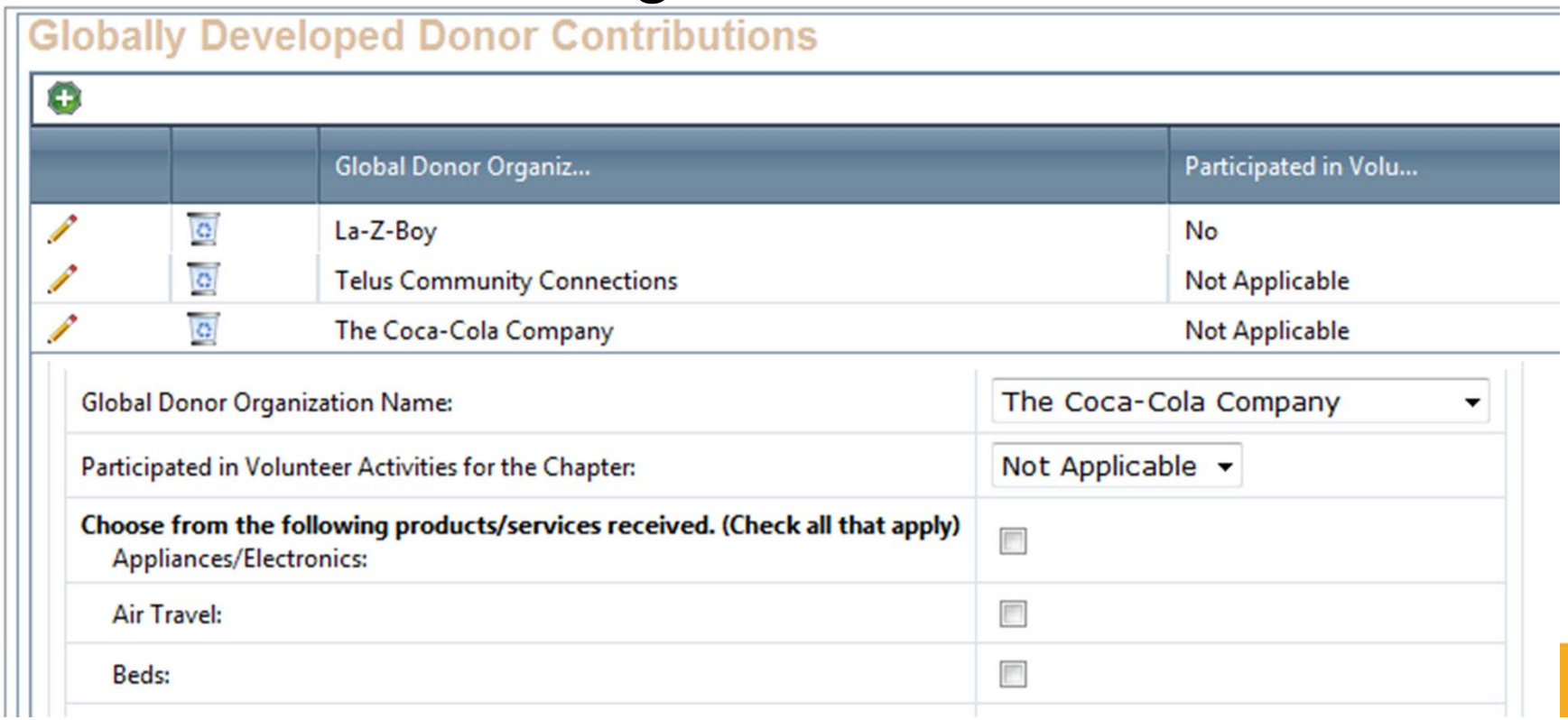


wvMultiInstance

- 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

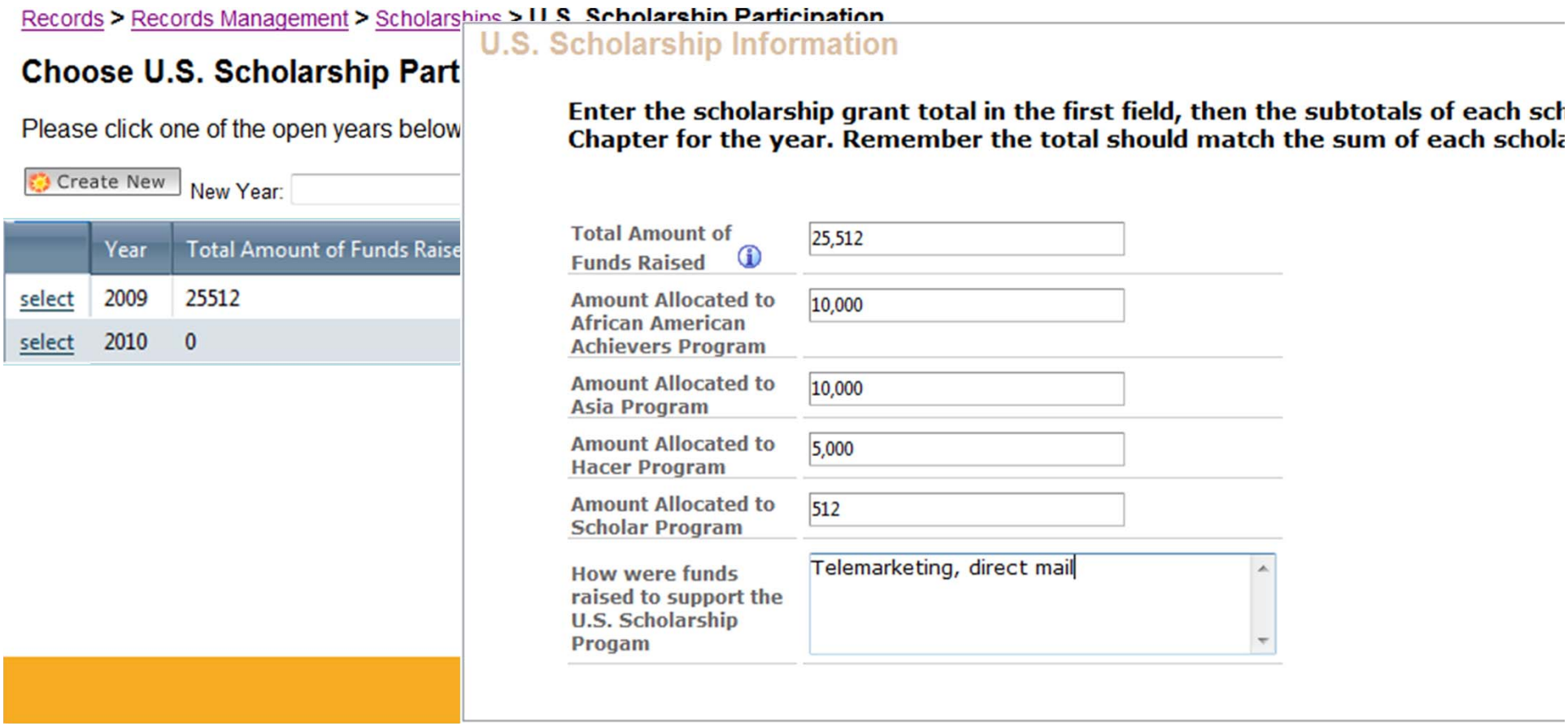
wvMultiInstance

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



wvMultiInstance

- Enhanced mode - summary to detail



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	1,007
# of donors who actively participate in your Chapter activities	0

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

* Count of Chapter volunteers	3,209
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

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