5 Cool Things You Can Do in RiSE

Jodi O'Toole with Angela Nimer

Fraternal Roundtable

COMPUTER SYSTEM innovations

How to make your staff site TOP NOTCH!

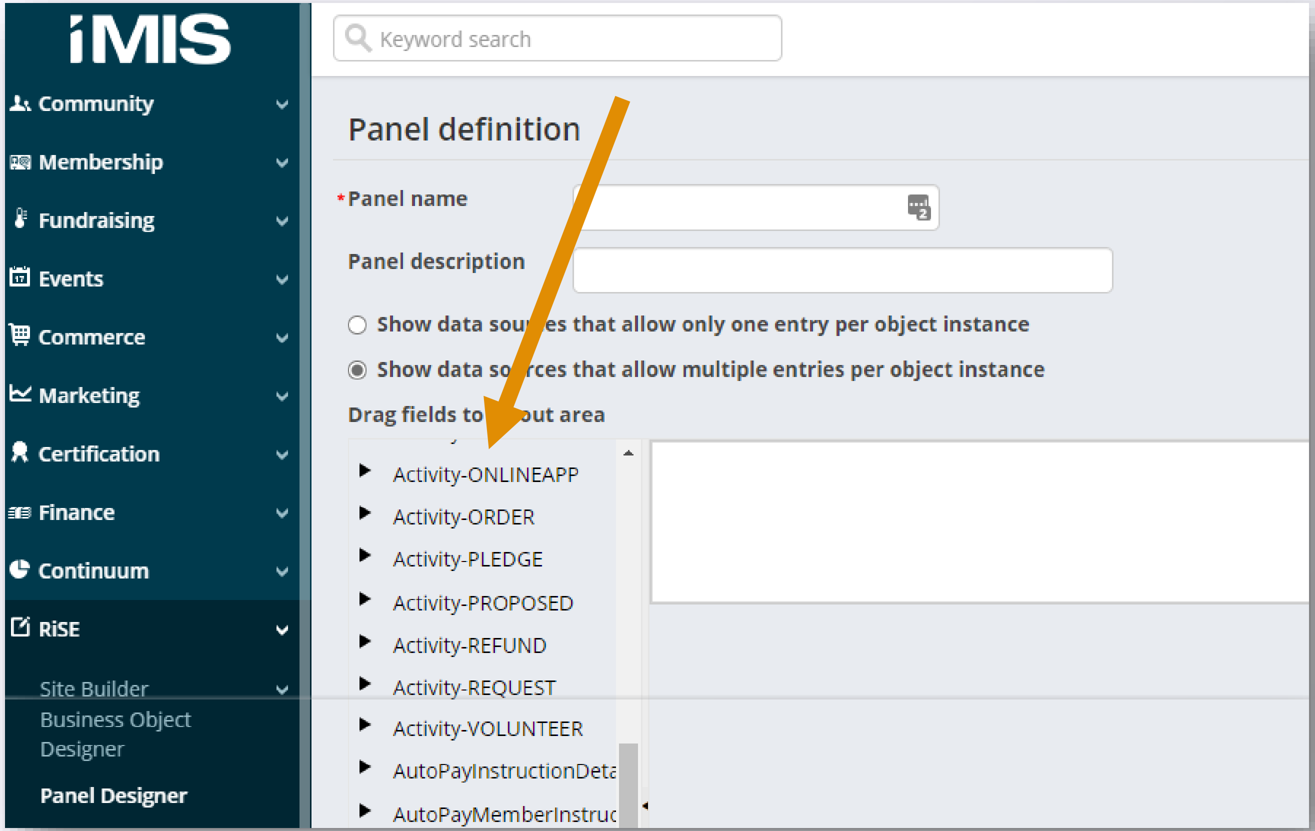
- Are panel date/times blinking 12:00 AM like an old VCR?
- Are fields and their values confusing some staff members?
- How do you know when a high level donor is calling?
- Ever needed to quickly update just a few fields on multiple member records?
- Do you need to know how to deal with blank Address 2/Address 3 lines?

RiSE is the future and it's here now for all of us.

Let's learn how to make RiSE really soar throughout your organization!

Goodnight 12:00AM!

- You know what's super easy in RiSE?
  - Adding activity panels!
  - All there & ready to use
  - But are they really?



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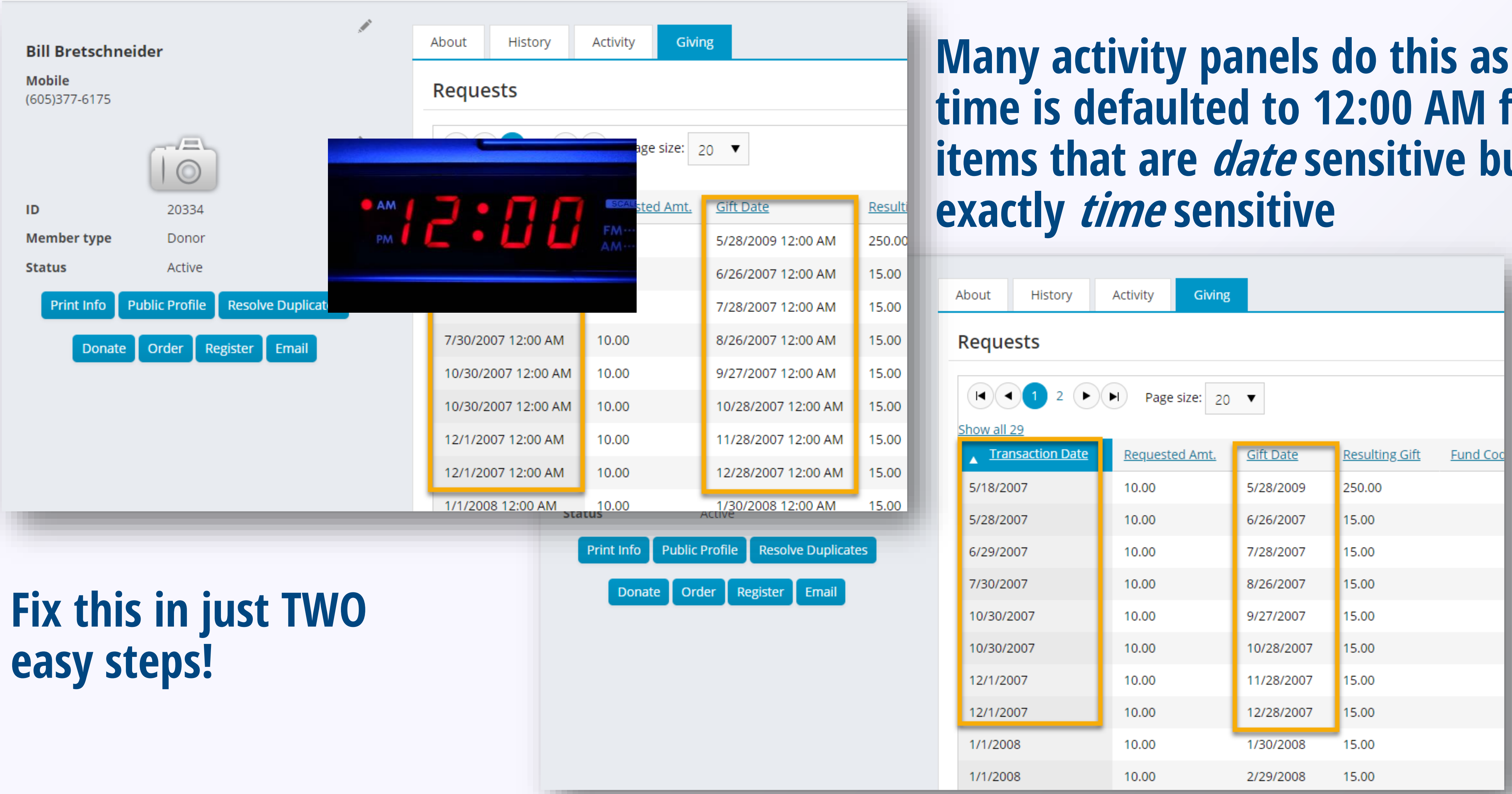
Goodnight 12:00AM! *Before & After*



Many activity panels do this as the time is defaulted to 12:00 AM for items that are *date* sensitive but not exactly *time* sensitive

Fix this in just TWO easy steps!

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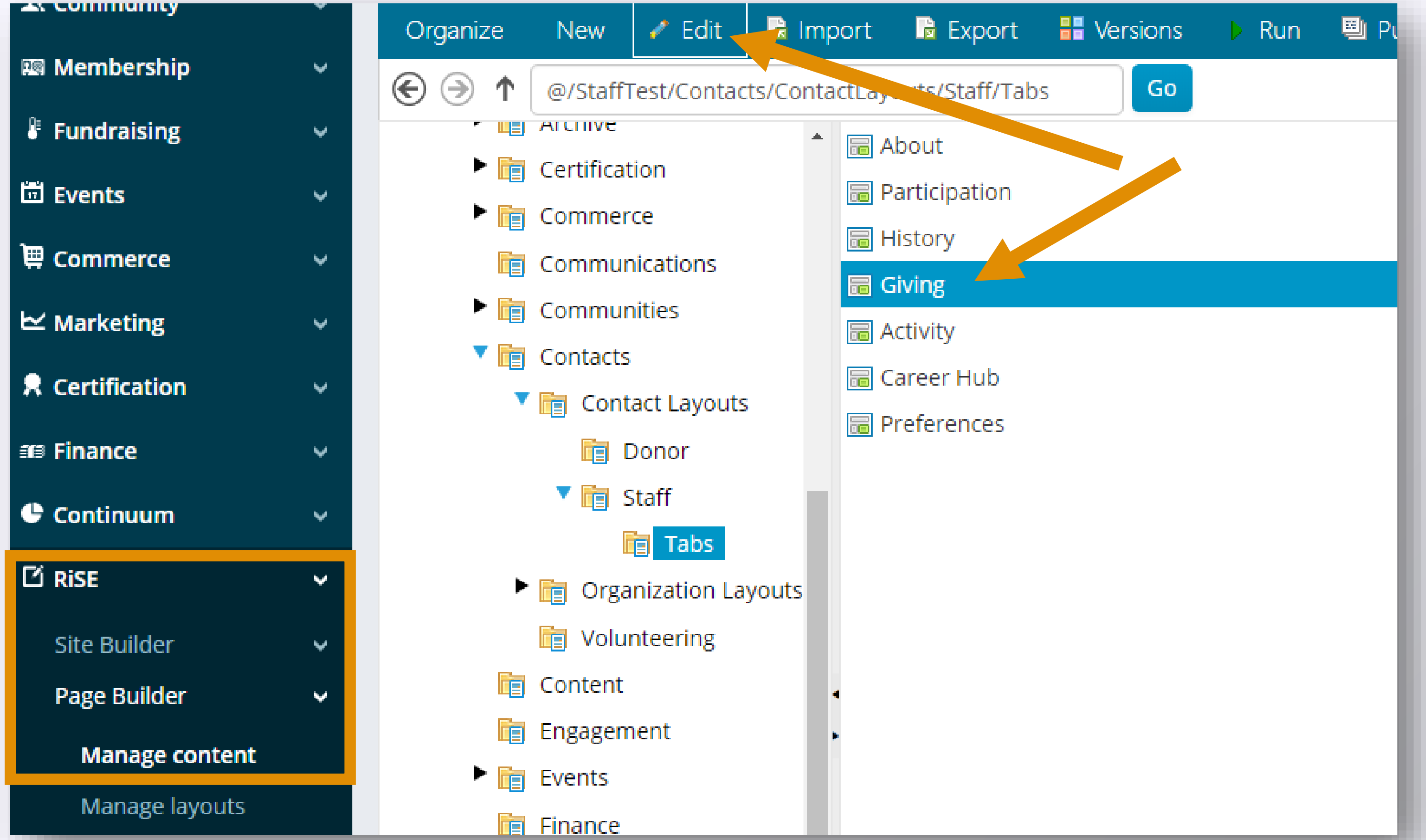
Goodnight 12:00AM! *Step 1: Add function to tab*

- **Under RiSE > Page Builder > Manage Content**
- **Edit tab where the panel sits (specific to your panel)**



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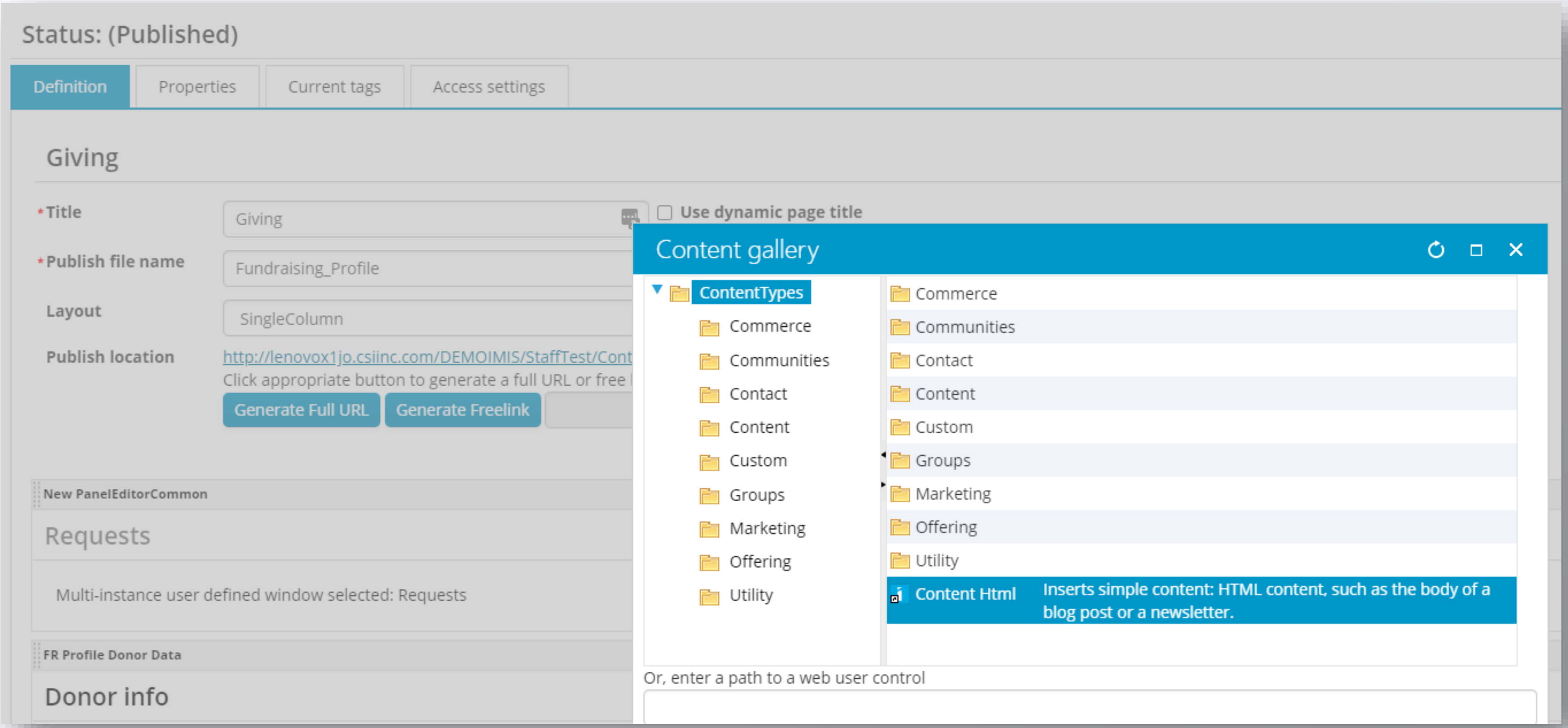
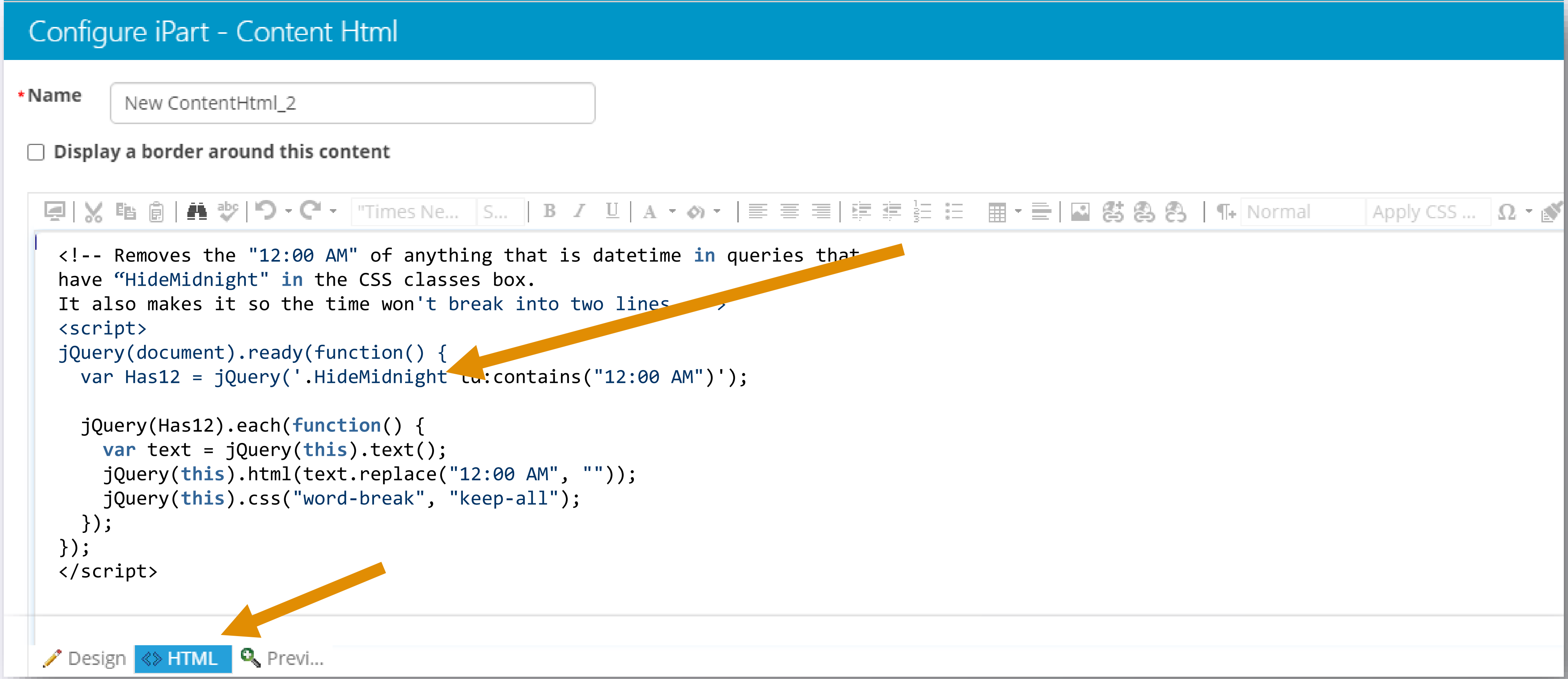
Goodnight 12:00AM! *Step 1: Add function to tab*

- **Choose Add Content**
- **Select Content HTML**



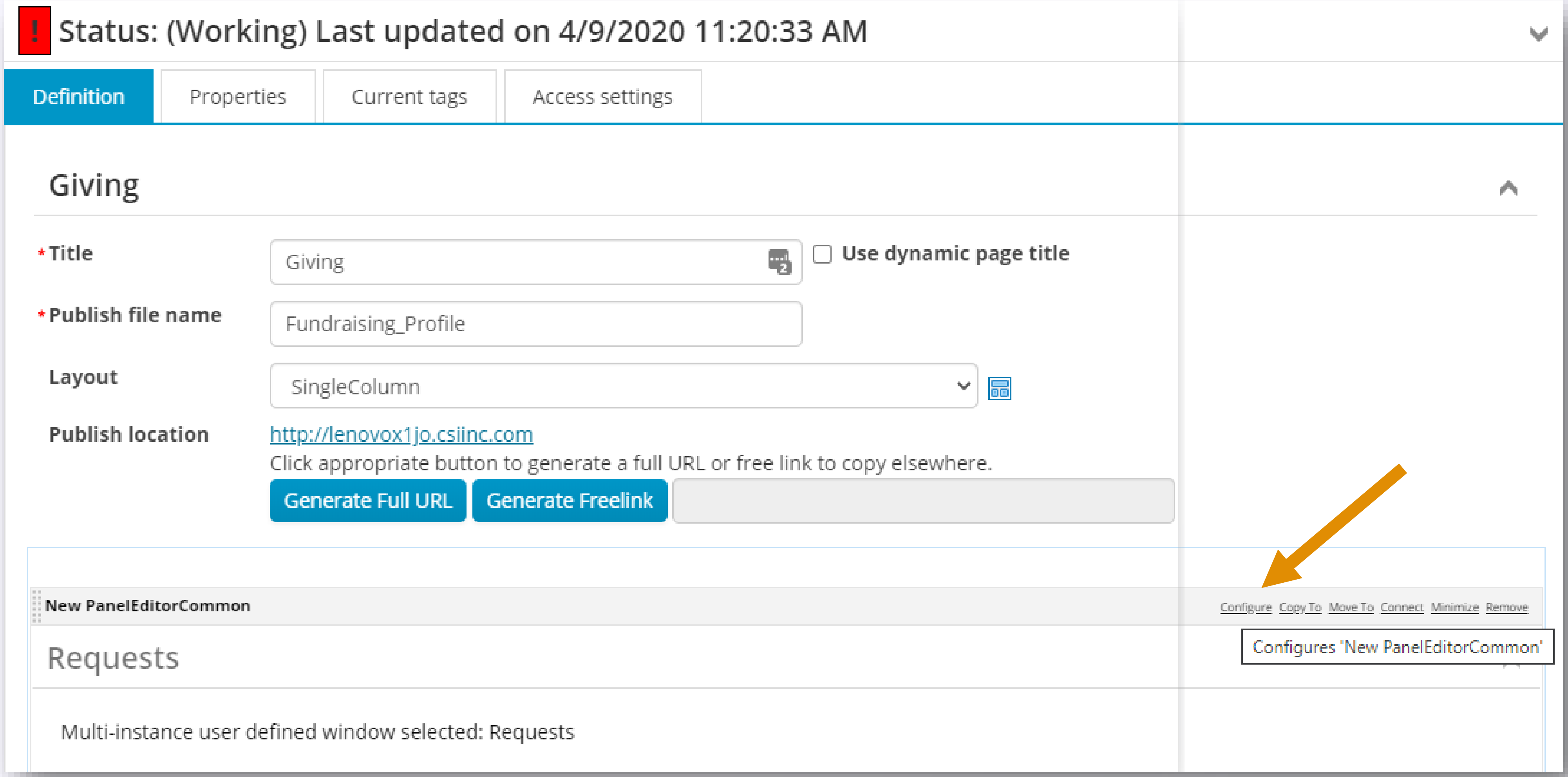
Goodnight 12:00AM! *Step 1: Add function to tab*

- **Choose the HTML editor view**
- **Paste code seen below, click OK (make note of class name)**



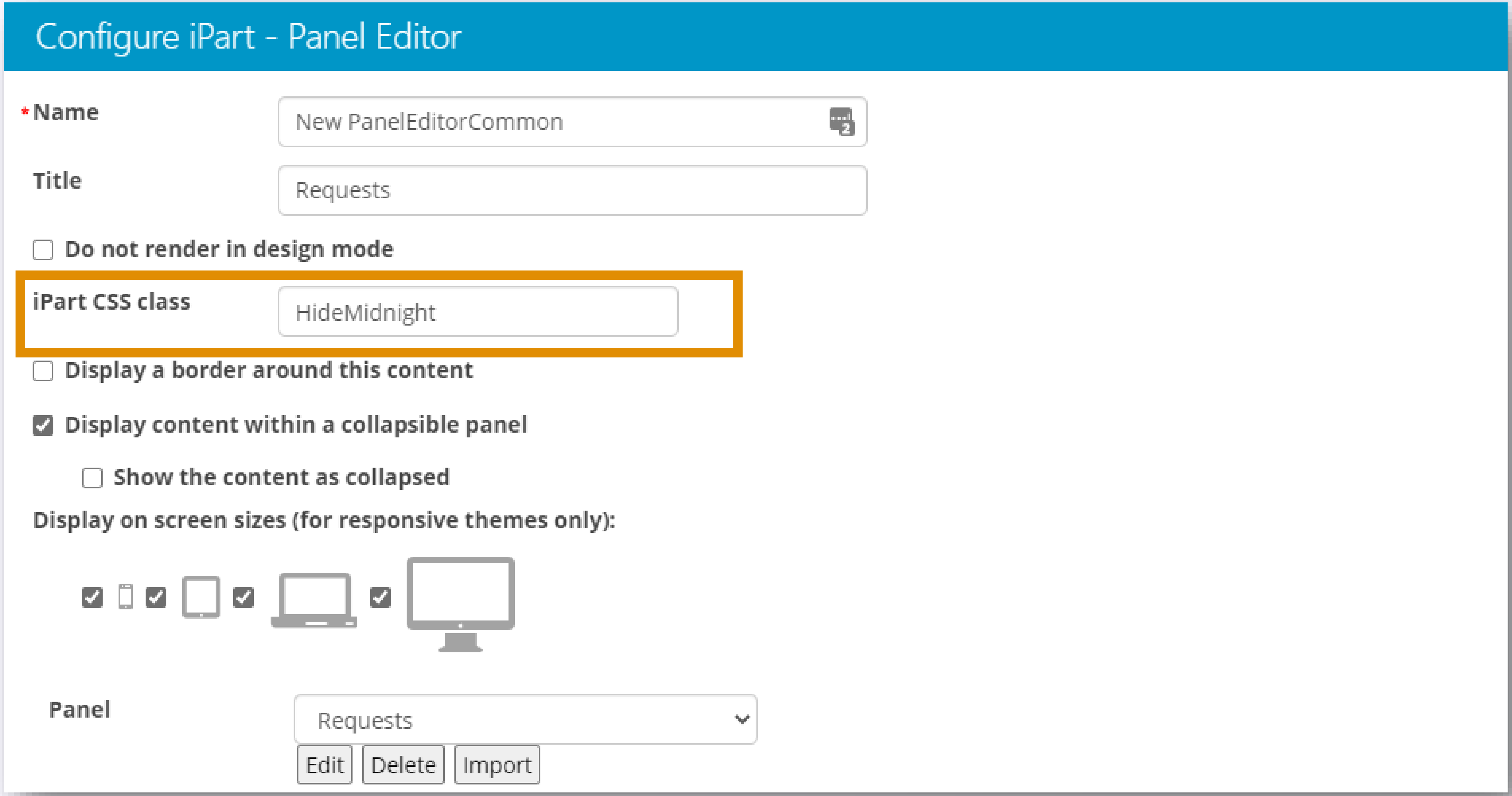
Goodnight 12:00AM! *Step 2: Add class to panel*

- **Choose Configure on the panel you want to hide**



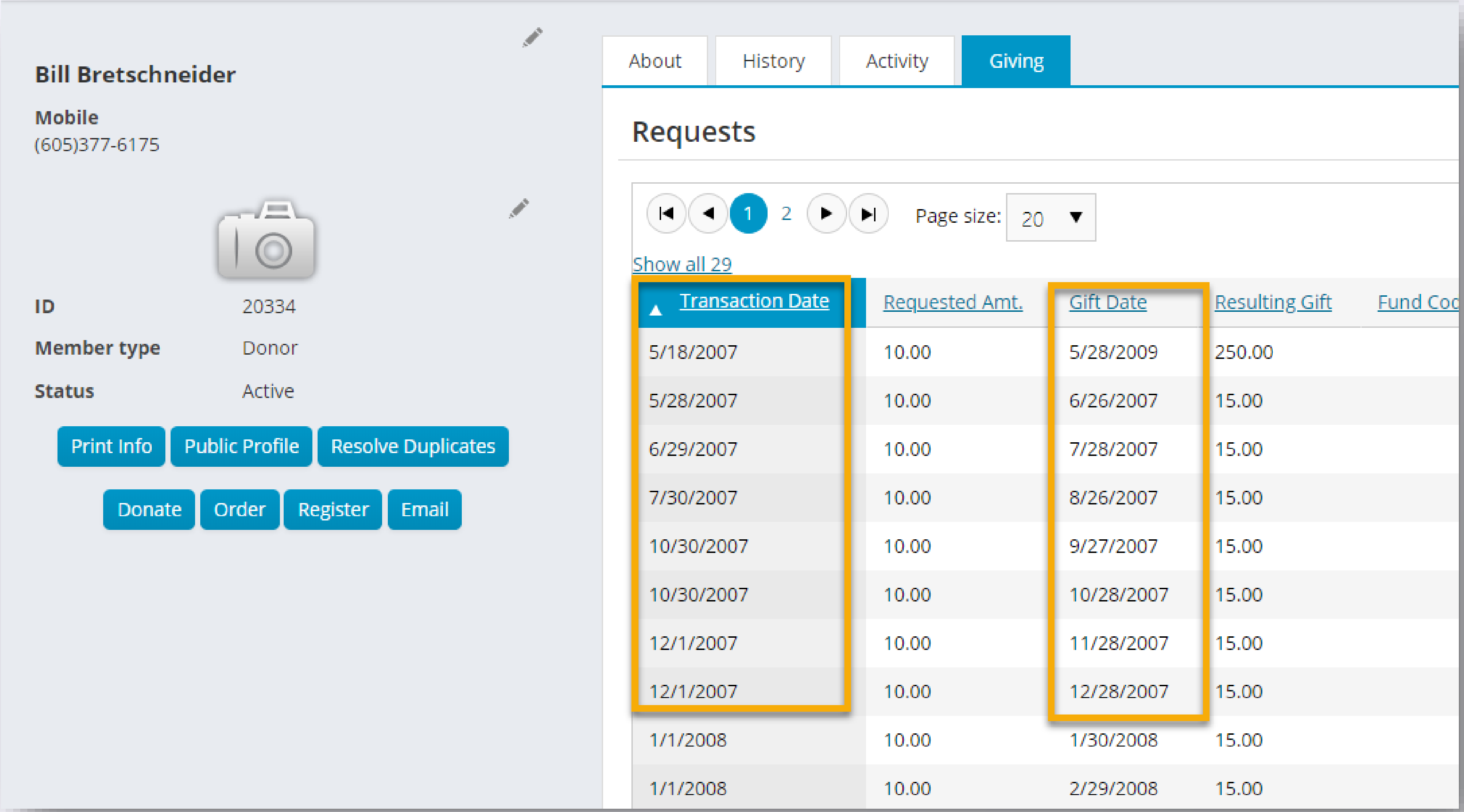
Goodnight 12:00AM! *Step 2: Add class to panel*

- **Add the CSS Class (function) to the iPart**



Goodnight 12:00AM! *Bye!*

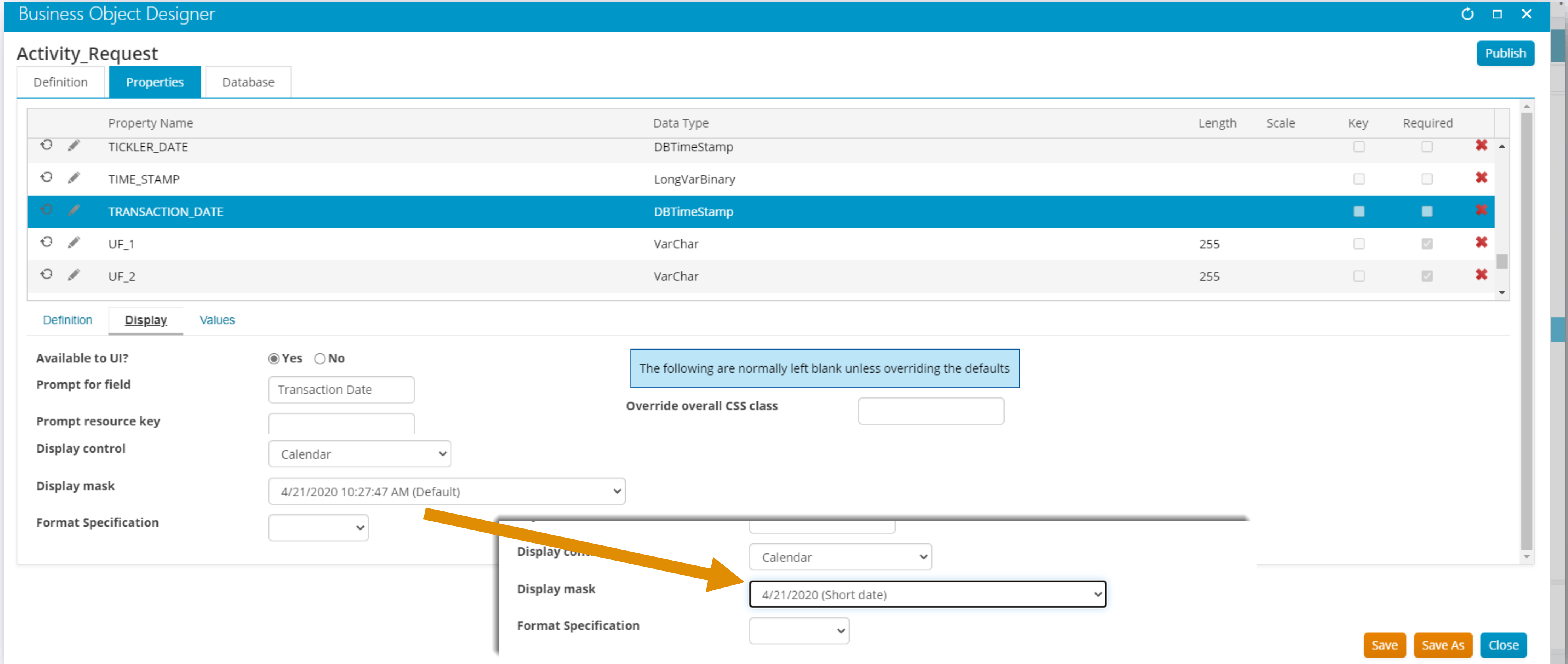
Voila!



Note:
This technique is not able to be deployed on VCRs
They're older than iMIS and not as cool as RiSE!

Goodnight 12:00AM! *Why not use Business Object?*

- **Wait… Haven't I adjusted the display of date/time just by adjusting the Display Mask in a business object?**



Goodnight 12:00AM! *Why not use Business Object?*

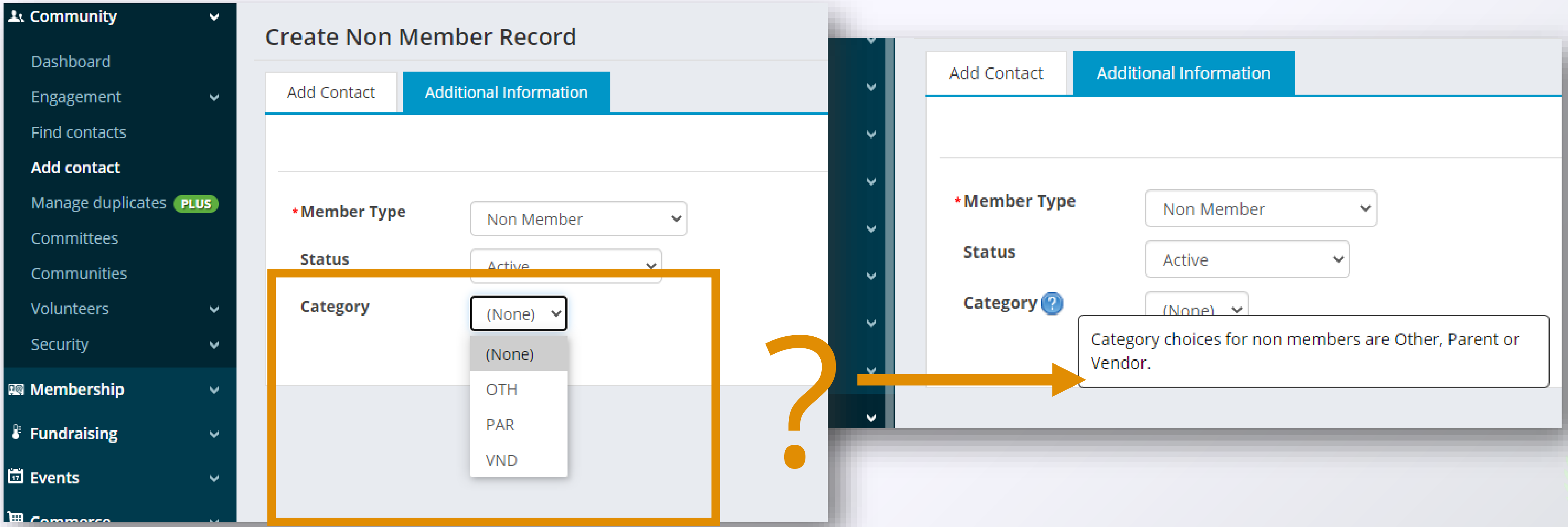
- **Short answer: Yes. This is a great method to update the display of date/time fields (and other field types).**
- **Reality: To accomplish the goal, each activity type would need:**
  - New Business Object
  - Display mask update
  - New Panel Definition
    - Requires inserting via SQL
    - Creates second instance of panel for same activity type as OOTB
- **Bottom line, if this is the only adjustment needed to the panel, this trick is a much quicker way to accomplish the same goal.**
- **Finally, tweaks like this aren't limited to date/time only, other challenges can be solved with different functions/CSS classes.**

What does it mean?

- **Are you continually asked the same clarifying questions?**
- **Do you have a page where you need to further explain a field?**
- **Questions like:**
  - Status vs Category vs Member Type
  - Transaction Date vs Effective Date
  - Chapter vs School vs University
  - ANY field or text that confuses the user!

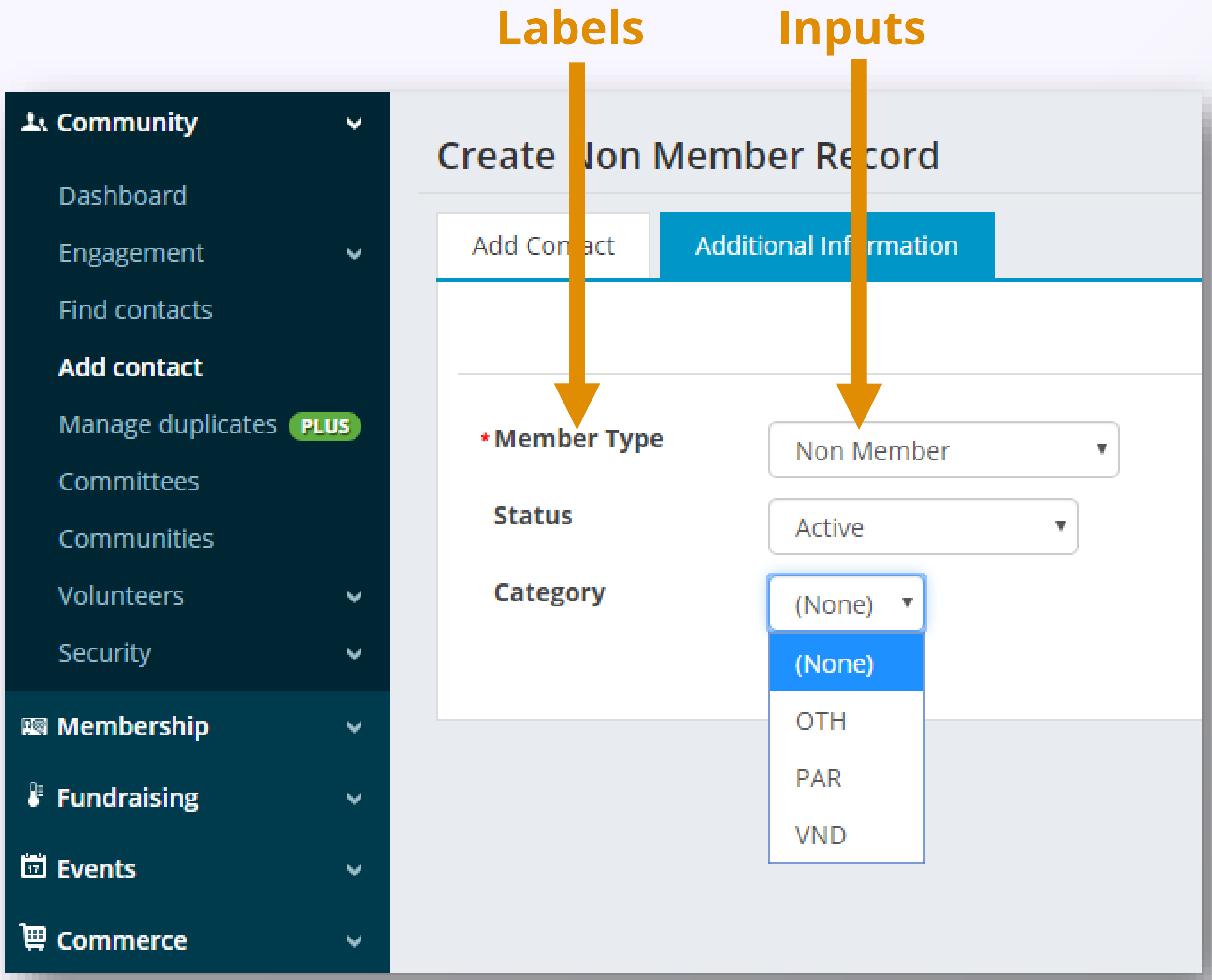
What does it mean? *Before & After*

Example: New non-member record data entry process.
New users seem to always ask about the category codes during the process.



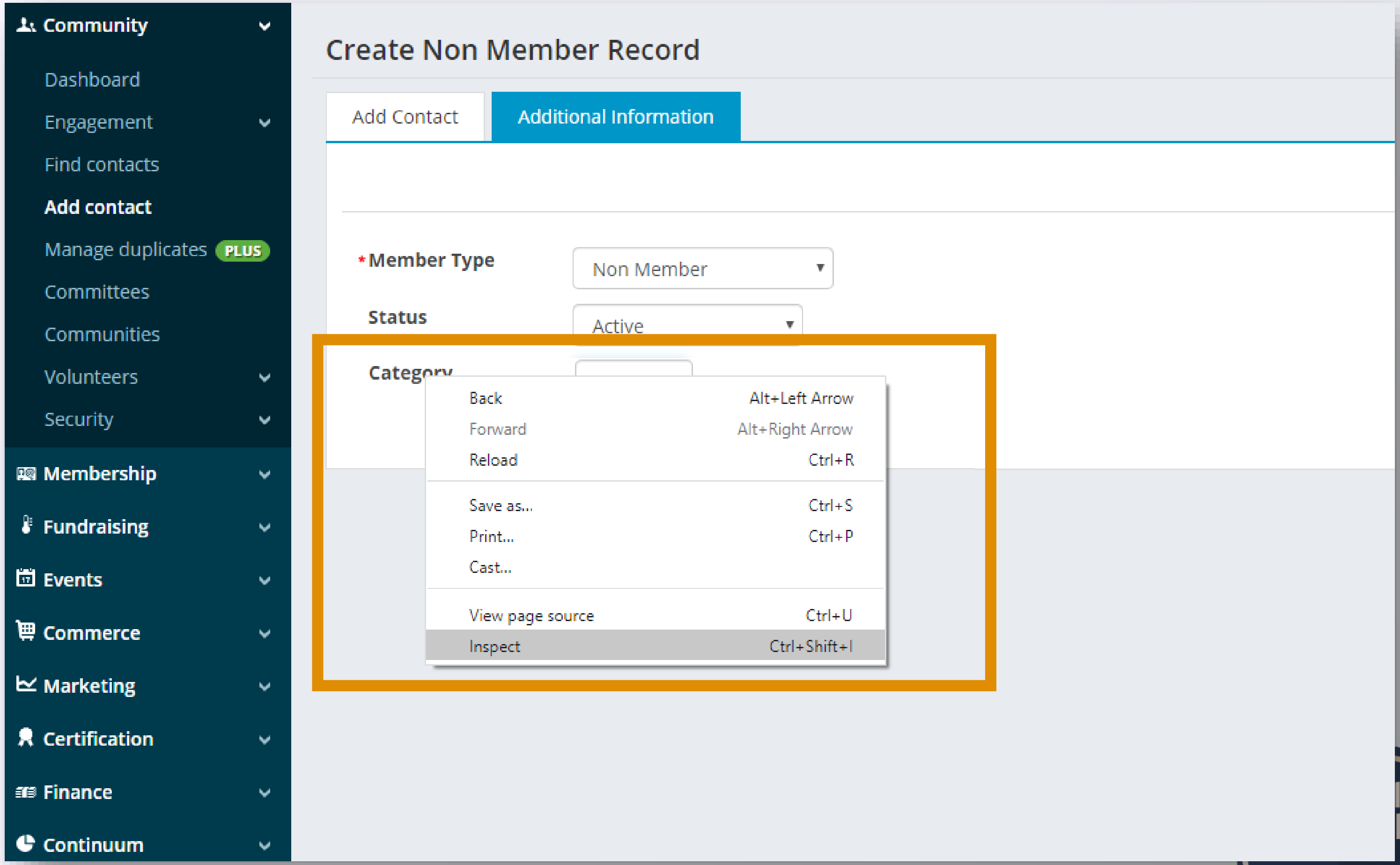
What does it mean? *Step 1: Analyze Placement*

- **RiSE is website**
- **Contains web pages**
- **Can contain forms with basic Form Elements: Labels & Inputs**
- **Category is form label in this example**



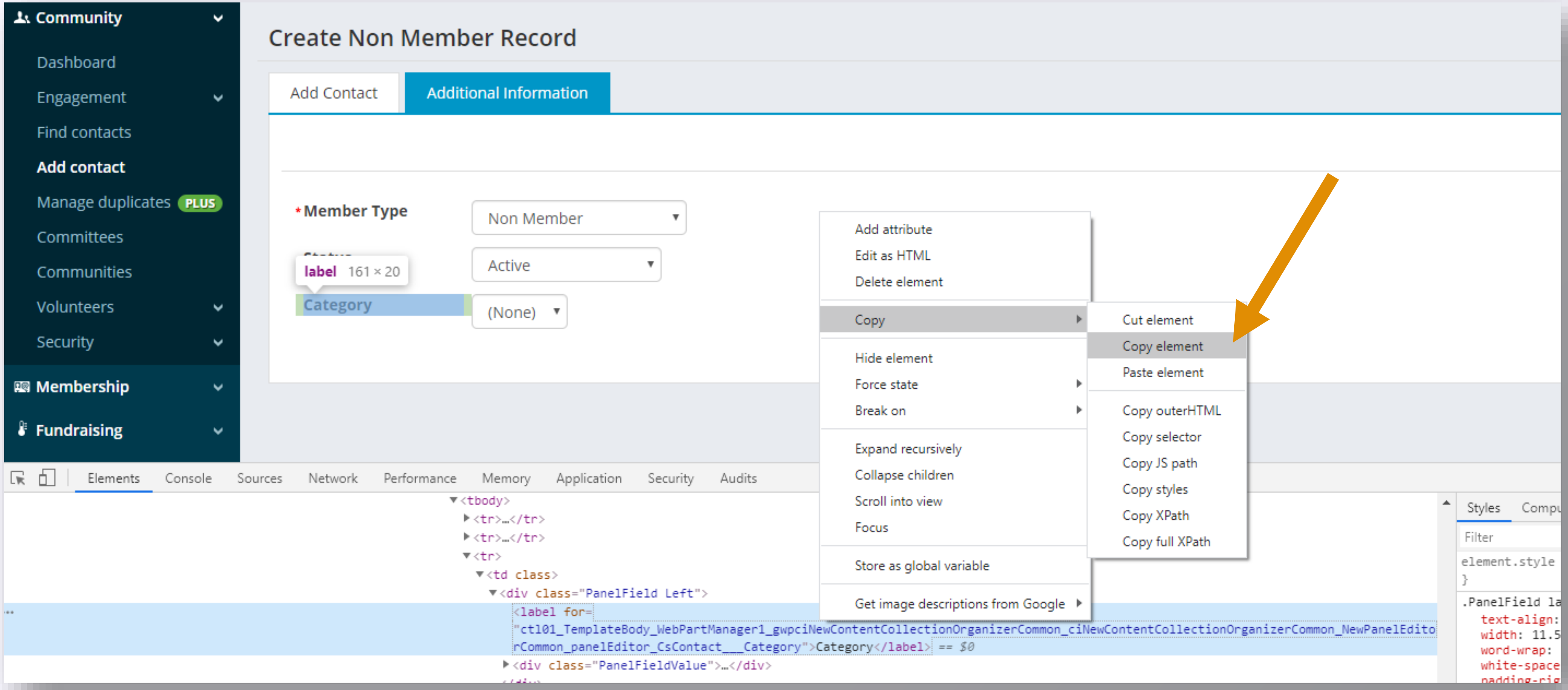
What does it mean? *Step 1: Analyze Placement*

- **Right Click "Category" (label)**
- **Choose Inspect**



What does it mean? *Step 1: Analyze Placement*

- **Right Click on Label (already selected) > Copy > Copy Element**



TIP: Highly recommend learning about and play with DevTools. All major browsers have this functionality.

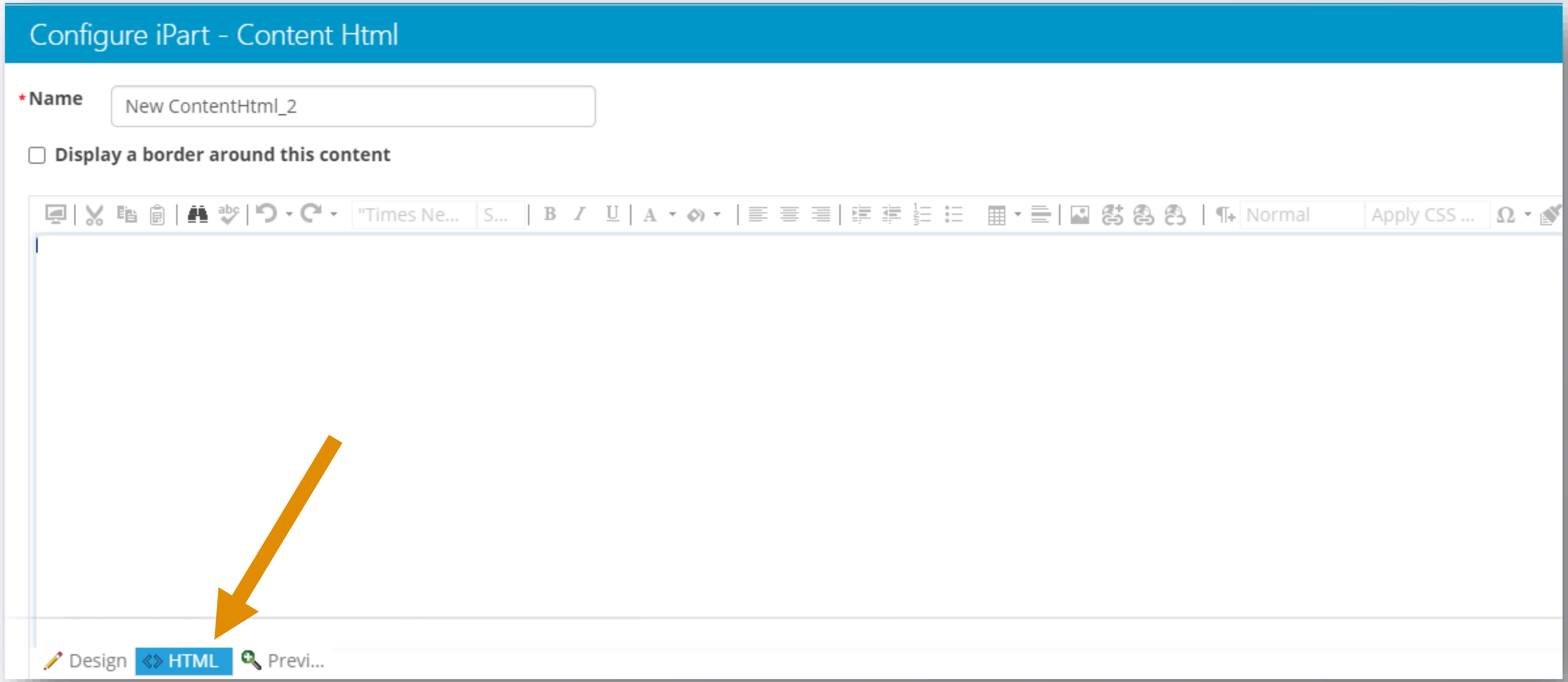
What does it mean? *Step 1: Analyze Placement*

- **Code below is example**
- **Highlighted section between quotes is the value to use**

```
<label
for="ctl01_TemplateBody_WebPartManager1_gwpciNewContentCollectionOrganizerCommon_ciNewContentCollectionOrganizerCommon_NewPanelEditorCommon_panelEditor_CsContact___Category">
Category
</label>
```

What does it mean? *Step 2: Add Function to Content*

- **Find content page to add cool thing to**
- **Choose Add Content**
- **Select Content HTML**
- **Choose HTML Editor**



What does it mean? *Step 2: Add Function to Content*

```
<!-- Puts the i for Information -->
<style>
    /* Tooltip styling */
    .tooltip {
    display:none;
    position:absolute;
    border:1px solid #333;
    background-color:#ffffff;
    border-radius:5px;
    padding:10px;
    color:#000000;
    font-size:12px Arial;
    max-width: 400px;
    }
</style>

<script>
jQuery(document).ready(function () {
// Displays the tooltip
displayTooltip();

function displayTooltip() {
    // ****Begin: Add Form Items to Display Tooltip
jQuery('label[for$="
ctl01_TemplateBody_WebPartManager1_gwpciNewContentCollectionOrgani
zerCommon_ciNewContentCollectionOrganizerCommon_NewPanelEditorC
ommon_panelEditor_CsContact__Category "]').append(' <img
src="/images/Icons/Alerts/info-color.png" class="masterTooltip"
title="This will be your organization name." width="20"/>');
    // **** End: Add Form Items to Display Tooltip
        // Displays the tooltip text upon hover and removes it upon
mouse out
    jQuery('.masterTooltip').hover(function () {
        // Hover over code
        var title = jQuery(this).attr('title');
        var p = document.createElement('p');
        jQuery(this).data('tipText', title).removeAttr('title');
        jQuery(p).addClass('tooltip').text(title).appendTo('body').f
adeIn('slow');
    }, function () {
        // Hover out code
        jQuery(this).attr('title', jQuery(this).data('tipText'));
        jQuery('.tooltip').remove();
    }).mousemove(function (e) {
        var mousex = e.pageX + 20; //Get X coordinates
        var mousey = e.pageY + 10; //Get Y coordinates
        jQuery('.tooltip')
            .css({ top: mousey, left: mousex })
    });
}

Sys.Application.add_init(function () {
        Sys.WebForms.PageRequestManager.getInstance().add_endRequest
(EndRequestHandler);
});
function EndRequestHandler(sender, args) {
     displayTooltip();
}
});

</script>
```

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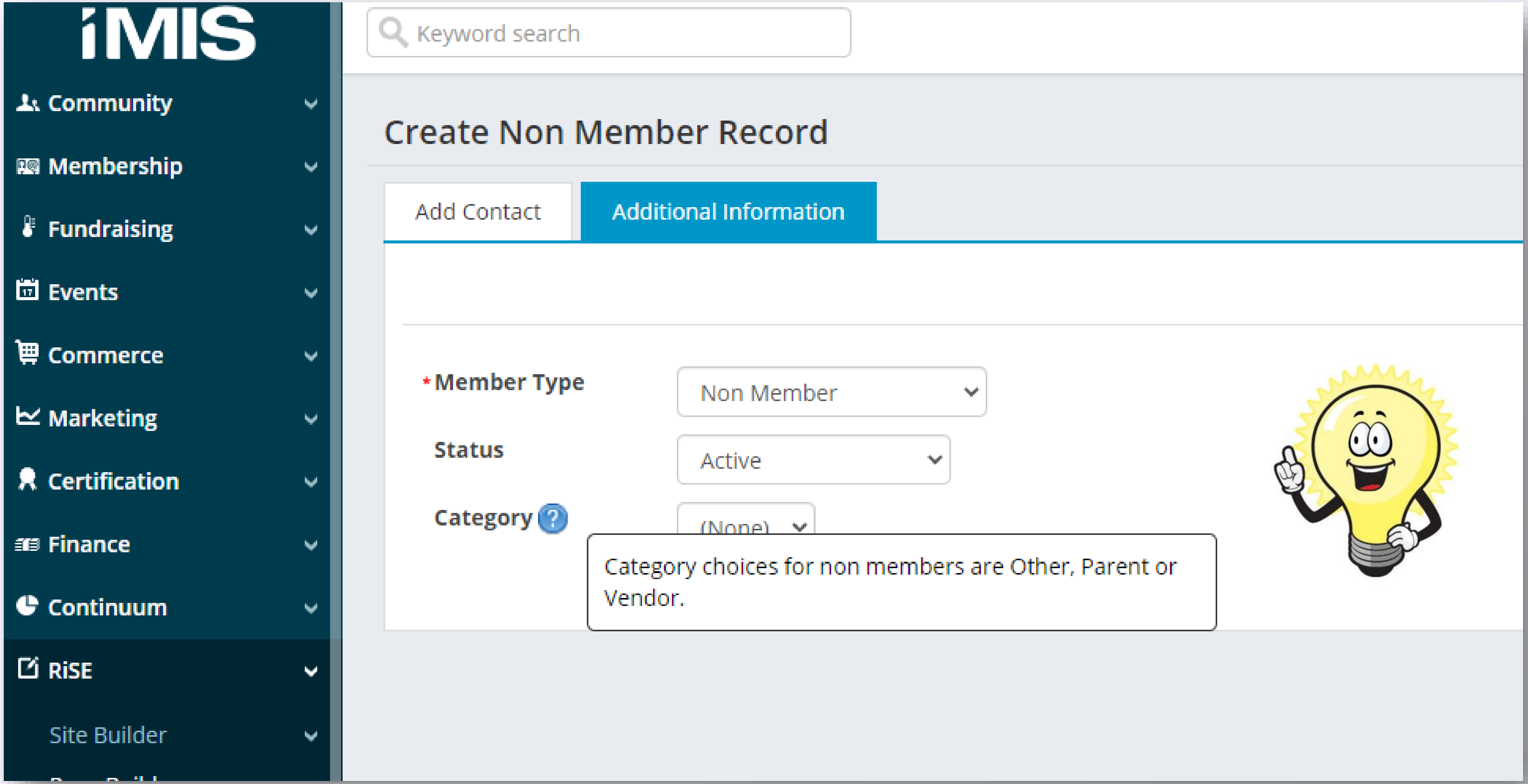
What does it mean? *Step 2: Add Function to Content*

- **Yellow highlighted item is the label**
- **Blue highlighted item is the icon image**
- **You can use whatever image you want – maybe it's even unique to your organization, you just have to upload to your server and know the path.**

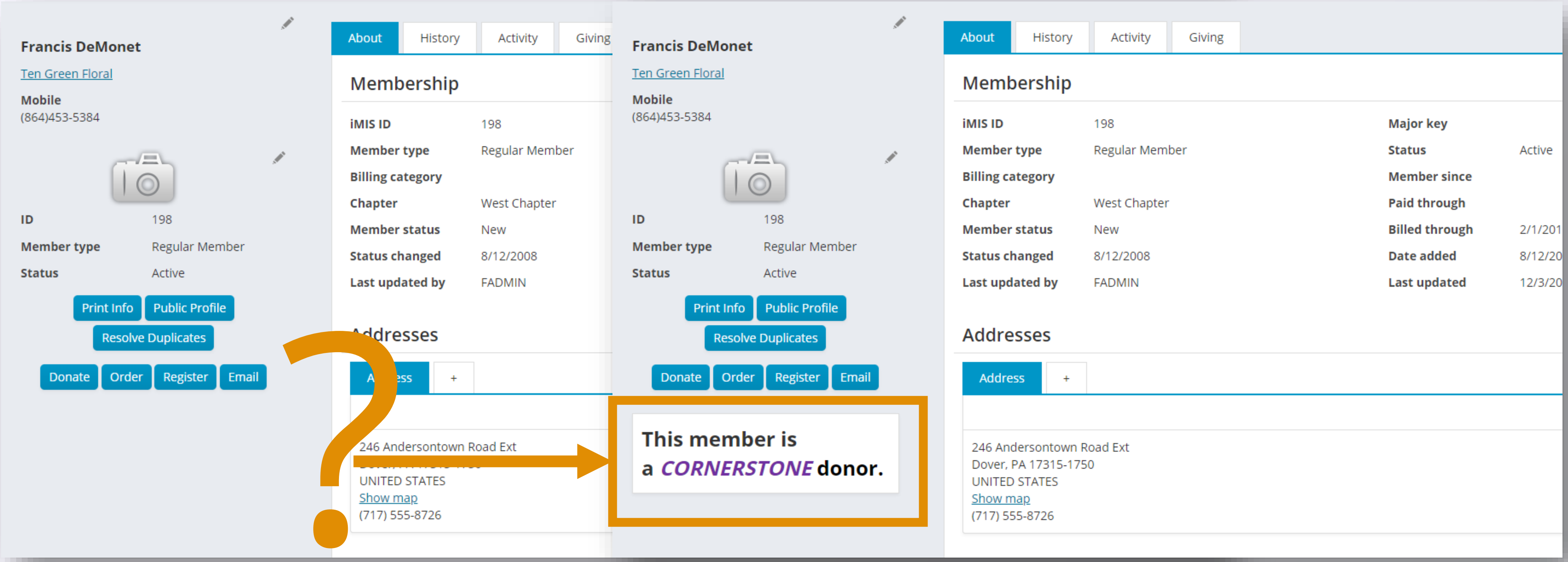
```
  // ****Begin: Add Form Items to Display Tooltip
jQuery('label[for$="ctl01_TemplateBody_WebPartManager1_gwpciNewContentCollectionOrganizerCommon_ciNewContentCollectionOrganizerCommon_NewPanelEditorCommon_panelEditor_CsContact___Category "]').append(' <img src="/images/Icons/Alerts/icon_help.png" class="masterTooltip" title="This will be your organization name." width="20"/>');
  // **** End: Add Form Items to Display Tooltip
```

What does it mean? NOW I KNOW!



Who am I talking to? *Before & After*

- You may quickly know their name
- Do you *really* know who you are talking to?



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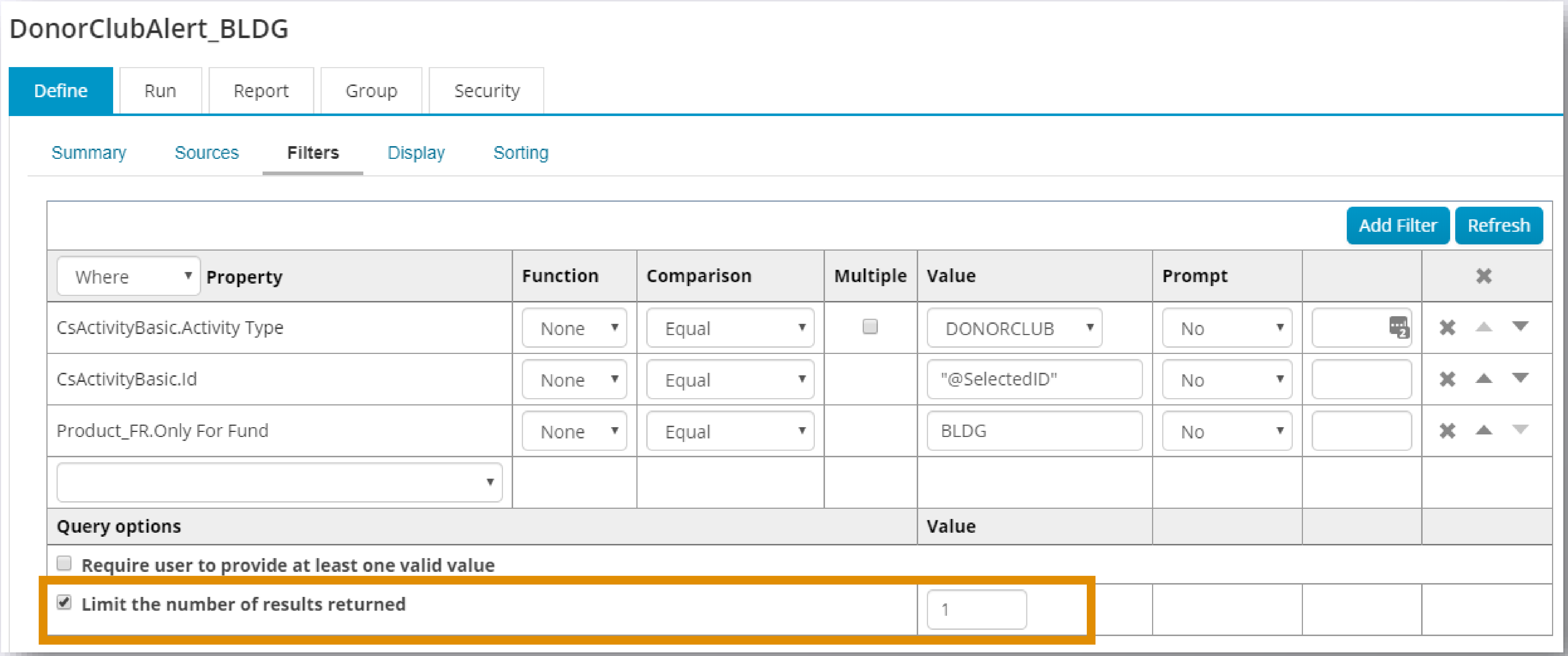
Who am I talking to? Step 1: Define the Query

- **Simple question: What do you want to know?**
- **Answer: Most recent donor club level a donor achieved for specific fund**



Who am I talking to? Step 1: Define the Query

- **Simple question: What do you want to know?**

Summary | Sources | Filters | **Display** | Sorting

☐ Only display unique results — View selected columns

Selected — Refresh

Display	Property	Function	Alias	Link	Subtotal	Order	Length
☑	CsActivityBasic.Product Code	None			☐	1	

Summary | Sources | Filters | Display | **Sorting**

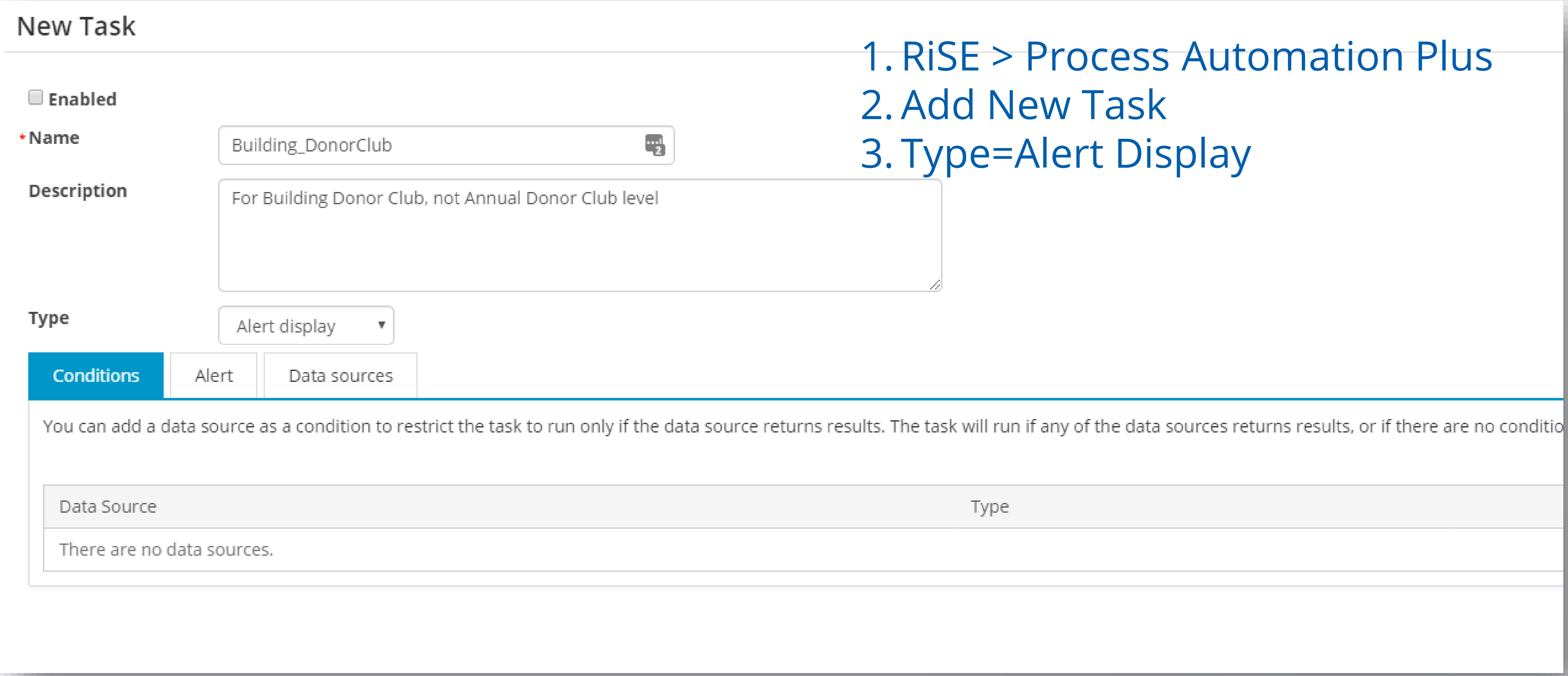
Refresh

Priority	Property	Direction	
1	CsActivityBasic.Transaction Date	Descending	✖
2		Ascending	+

Who am I talking to? Step 2: Setup the Alert

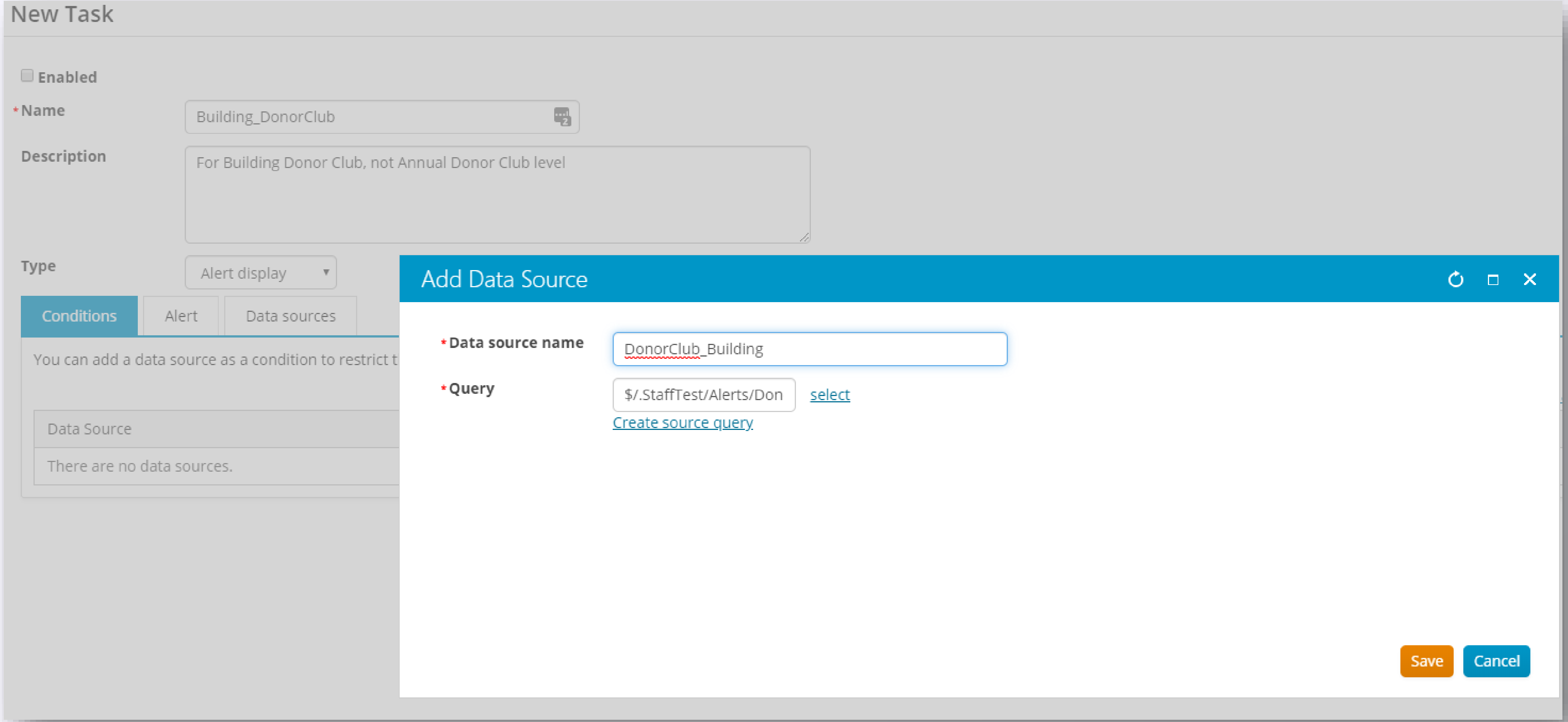
- **What do you want to it to say?**

1. RiSE > Process Automation Plus
2. Add New Task
3. Type=Alert Display



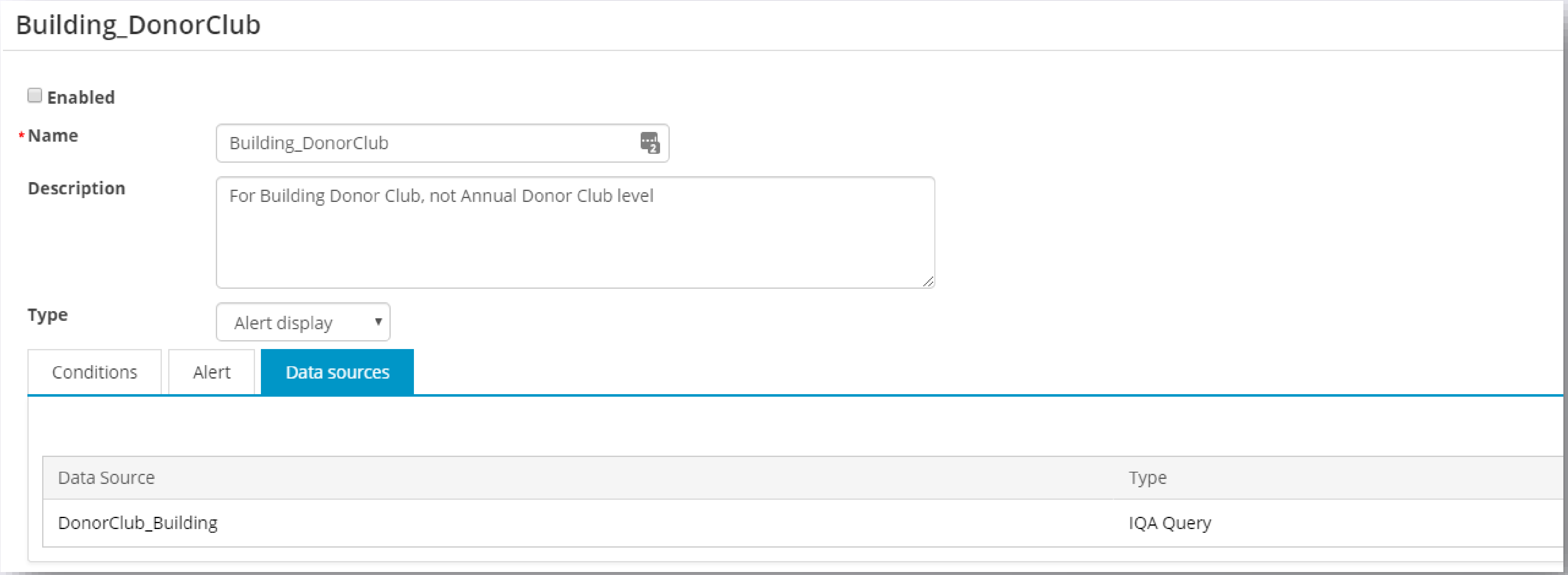
Who am I talking to? Step 2: Setup the Alert

- **What do you want to it to say?**



Who am I talking to? Step 2: Setup the Alert

- **What do you want to it to say?**



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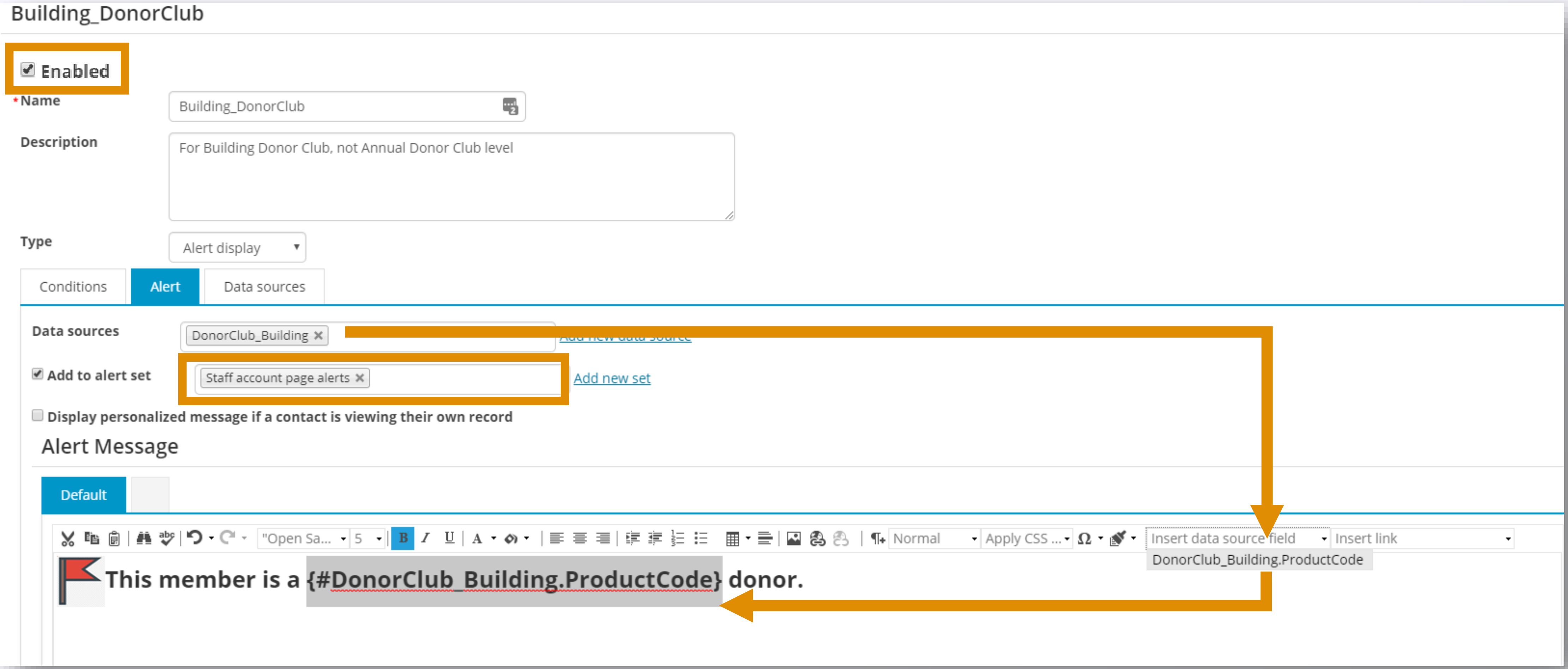
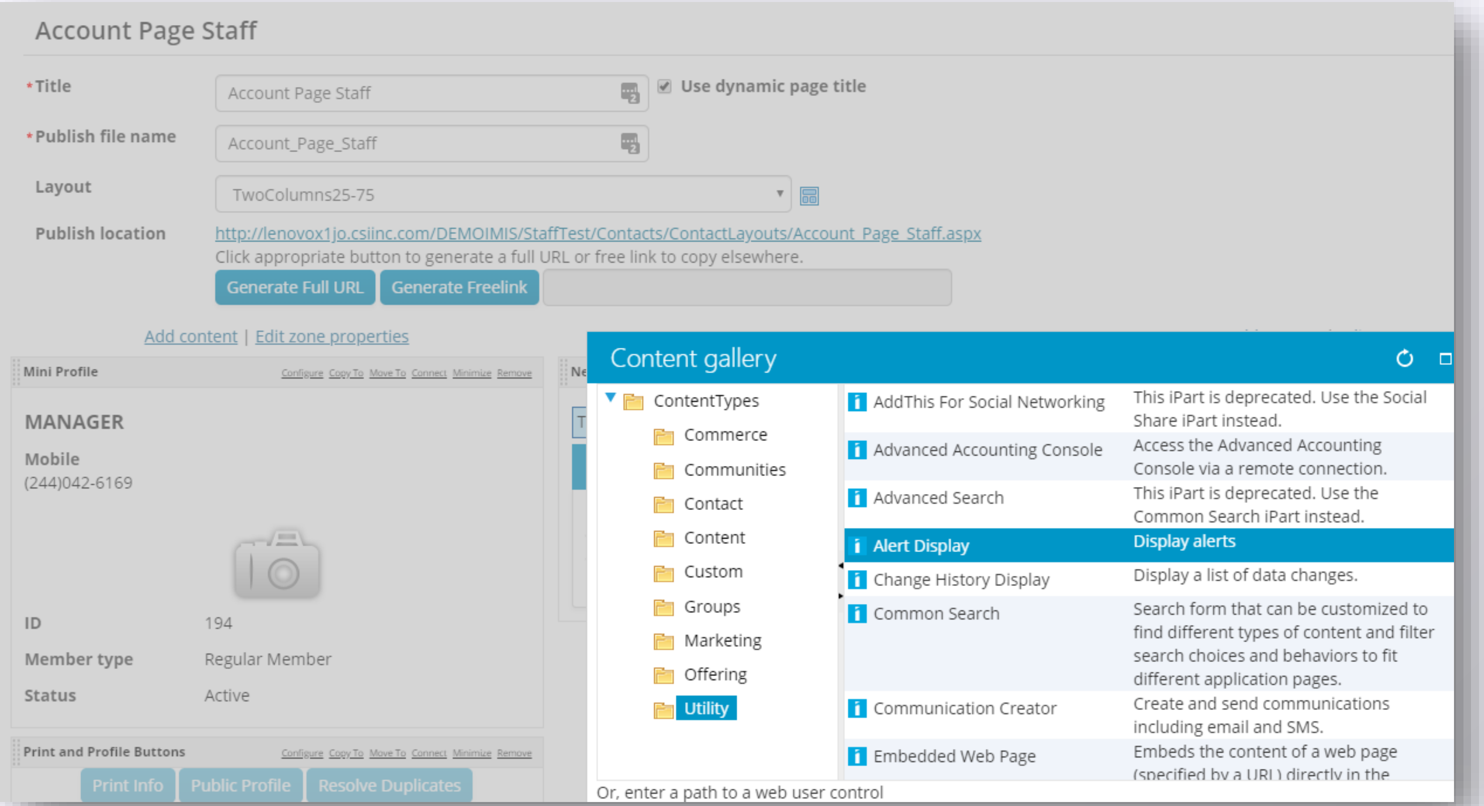
Who am I talking to? Step 2: Setup the Alert

- **What do you want to it to say?**



Who am I talking to? Step 3: Place on Content Page

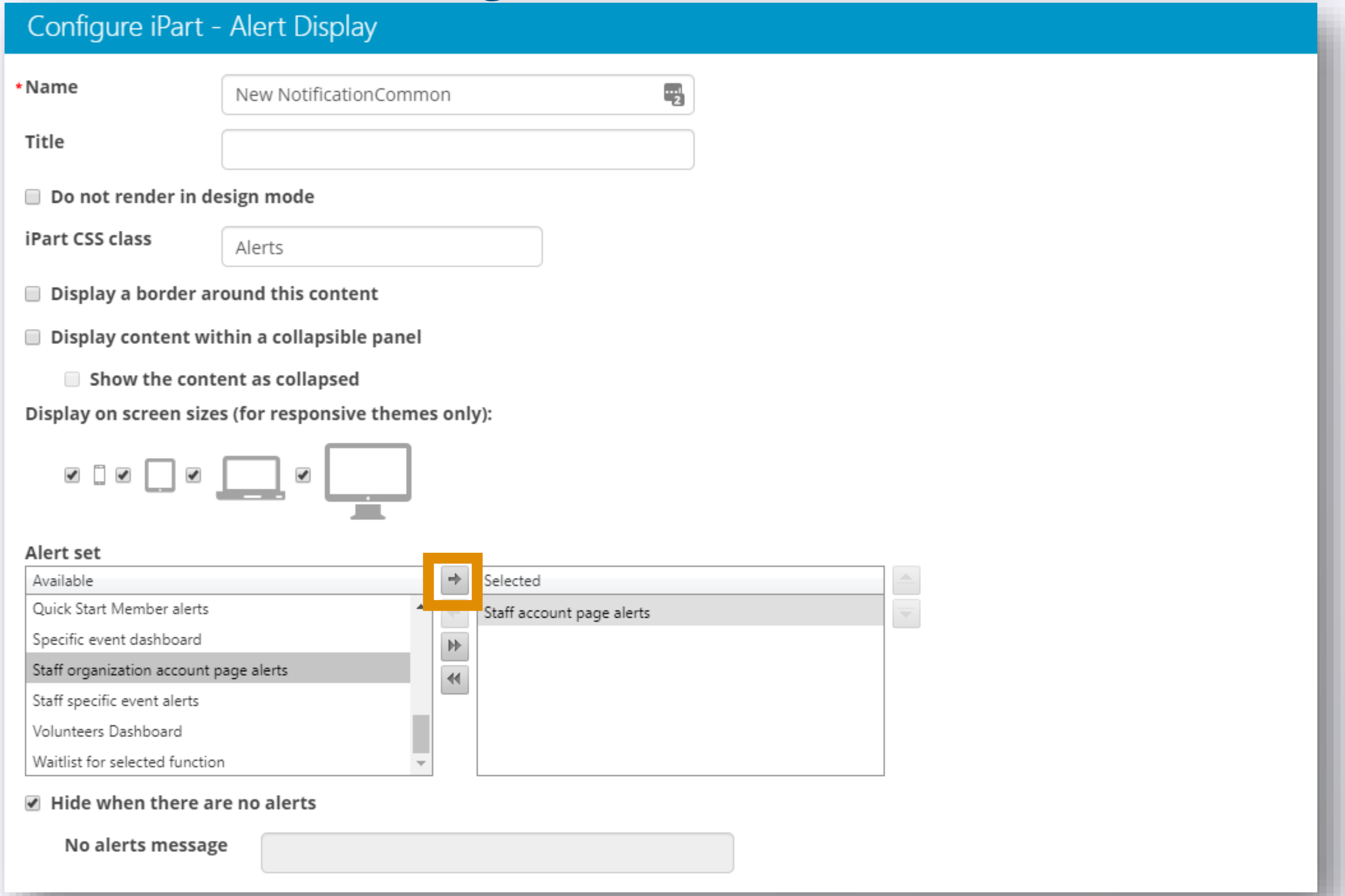
- **Where does this go?**



1. RiSE > Page Builder > Manage Content
2. Find Account Page Staff
3. Add content to left column.
4. Choose Alert Display

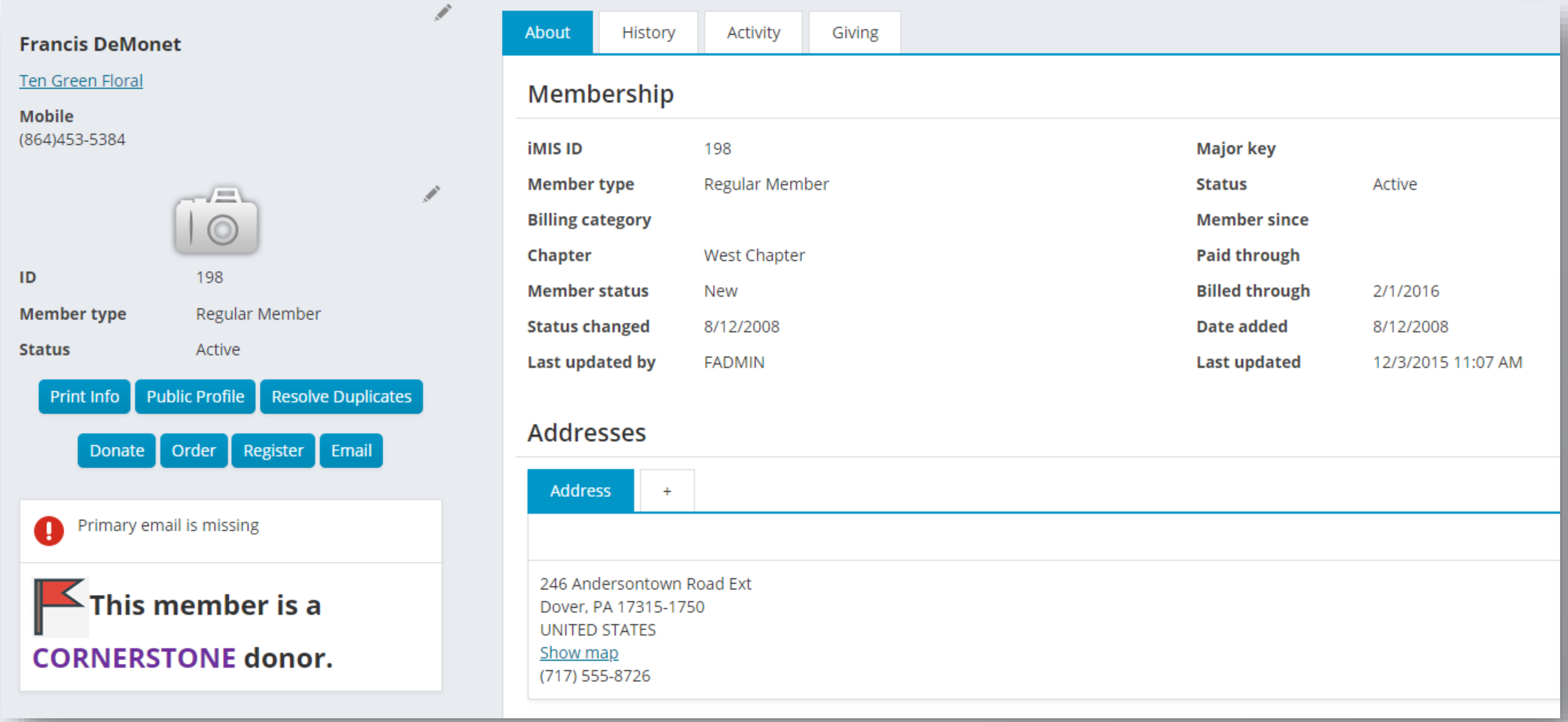
Who am I talking to? Step 3: Place on Content Page

- **Where does this go?**



Who am I talking to? Step 3: Place on Content Page

- **MUCH BETTER!**
- **Don’t stop here… Dream big… This is just the beginning!**

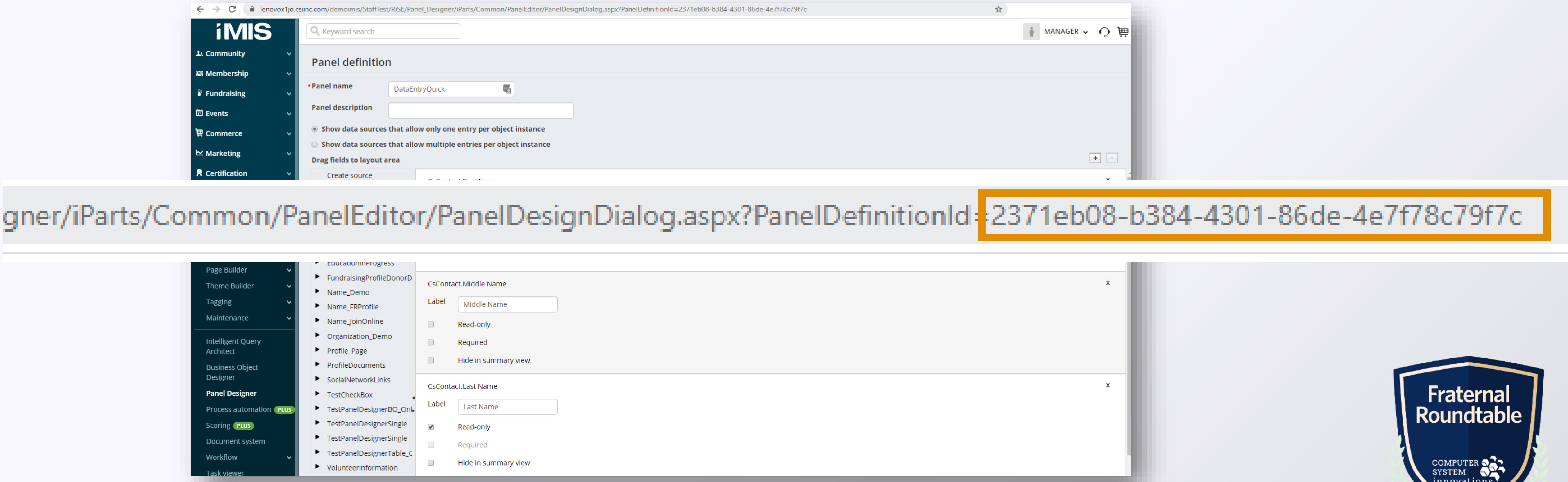


Quick Data Entry

- **Need to update records quickly?**
- **Have a call campaign to capture important member data?**

Quick Data Entry Step 1: Create Panel

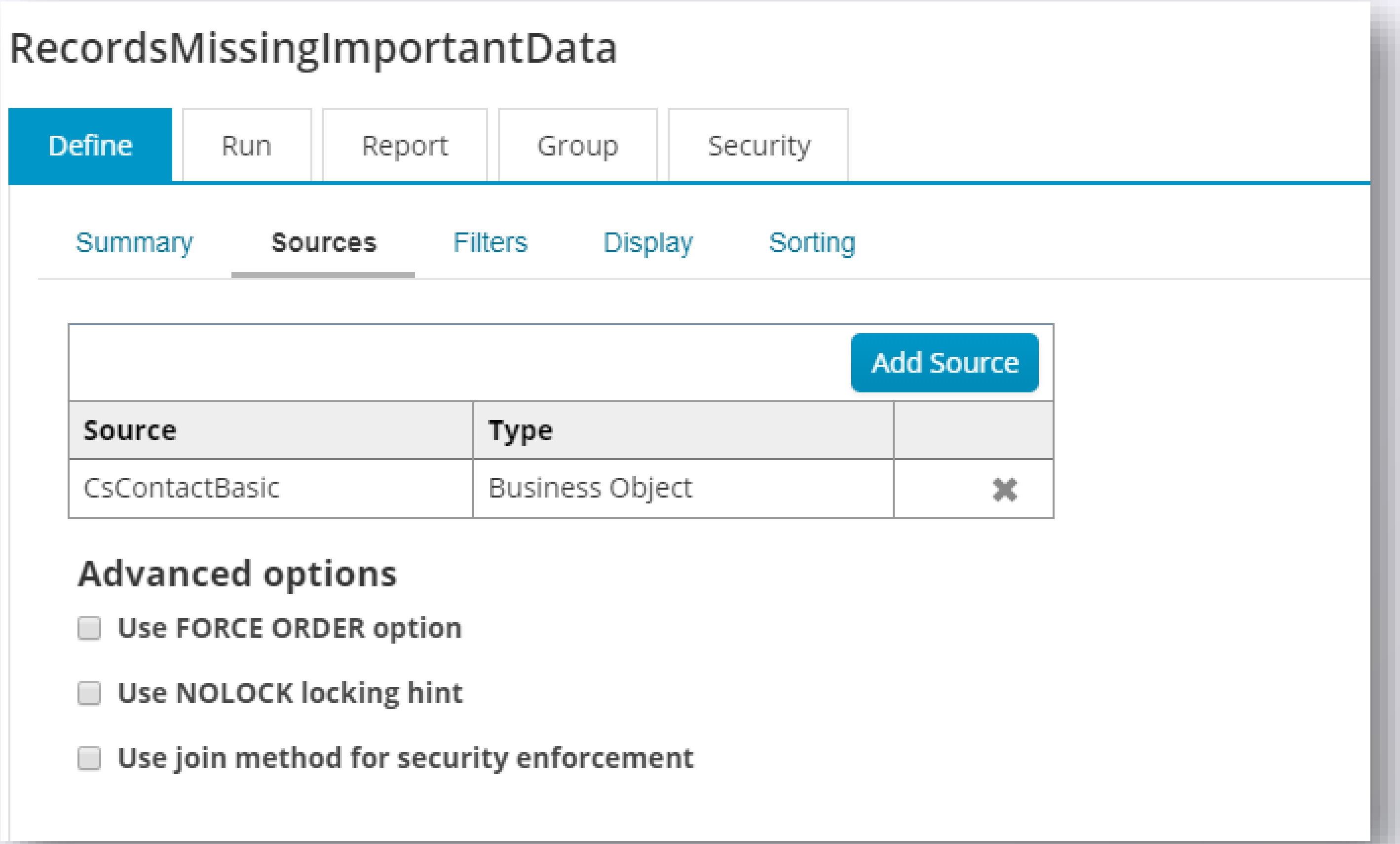
- **Create a new Panel definition**
- **Save Panel; Record the Panel Definition ID**



TIP: Since RiSE is a website, all pages have URLs.

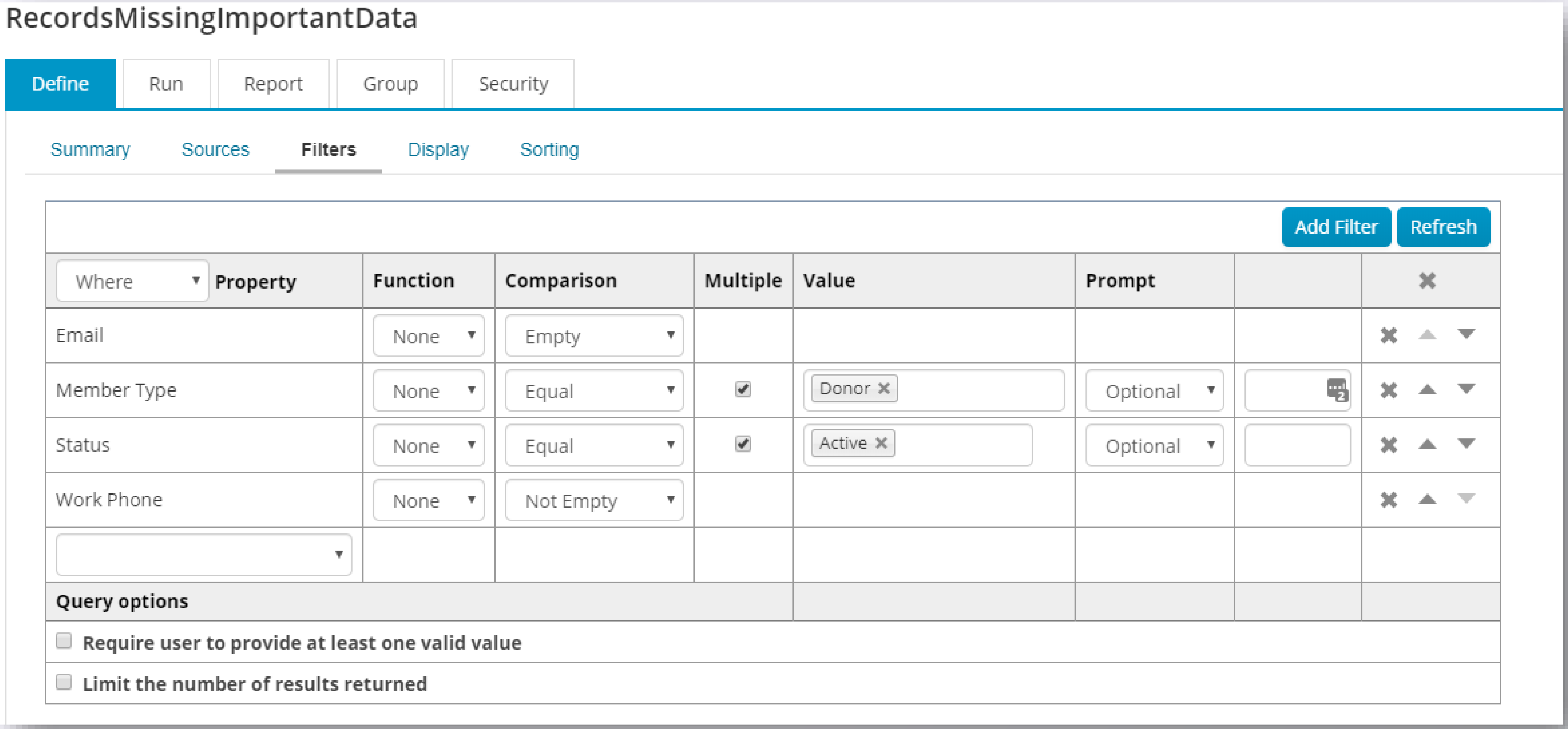
Quick Data Entry Step 2: Create Query

- Create a new query to define the records that need updates
- Simple query for donors



Quick Data Entry Step 2: Create Query

- **Query filters can be adjusted later to zero in on other records**



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Quick Data Entry Step 2: Create Query

RecordsMissingImportantData

Define | Run | Report | Group | Security

Summary | Sources | Filters | Display | Sorting

☑ **Only display unique results**

Selected

Display	Property	Function	Alias	Link
☑	iMIS Id	None	code_id	
☑	Full Name	None		
☑	Work Phone	None		
☑	Home Phone	None		
☑	Toll Free	None		
☑	Email	None		
☑	Char(60)+'div class="btn blue"'+Char(62)+Char(60)+'a style="display: block; text-decoration: none; color: #ffffff !important;" href="javascript:ShowDialog_NoReturnValue('+Char(39)+'~/iparts/Common/PanelEditor/PanelEditDialog.aspx?PanelDefinitionId=2371eb08-b384-4301-86de-4e7f78c79f7c&AllowEdit=True&ID='+vBoCsContactBasic.ID+'&TemplateType=E'+Char(39)+', null, '+Char(39)+'450'+Char(39)+', '+Char(39)+'780'+Char(39)+', '+Char(39)+'Edit'+Char(39)+', '+Char(39)+Char(39)+', '+Char(39)+'E'+Char(39)+', null, null, false, false, null, null)"'+Char(62)+'Edit'+Char(60)+'/a'+Char(62)+Char(60)+'/div'+Char(62)	None	Action	

Quick Data Entry Step 2: Create Query (Link)

Desired Result on page

<div class="btn blue">Edit</div>

Correct syntax

Char(60)+'div class="btn blue“'+Char(62)+Char(60)+'a style="display: block; text-decoration: none; color: #ffffff !important;" href="javascript:ShowDialog_NoReturnValue(‘+Char(39)+'~/iparts/Common/PanelEditor/PanelEditDialog.aspx?PanelDefinitionId=2371eb08-b384-4301-86de-4e7f78c79f7c&AllowEdit=True&ID=‘+vBoCsContactBasic.ID+'&TemplateType=E'+Char(39)+', null, ‘+Char(39)+'450’+Char(39)+', ‘+Char(39)+'780’+Char(39)+', ‘+Char(39)+'Edit’+Char(39)+', ‘+Char(39)+Char(39)+', ‘+Char(39)+'E’+Char(39)+', null, null, false, false, null, null)“'+Char(62)+'Edit’+Char(60)+'/a’+Char(62)+Char(60)+'/div’+Char(62)

Stay at home self learning:
SQL Concatenation: https://bit.ly/3cAQNrB - *ASCII Character Values* https://bit.ly/2VrxY4D

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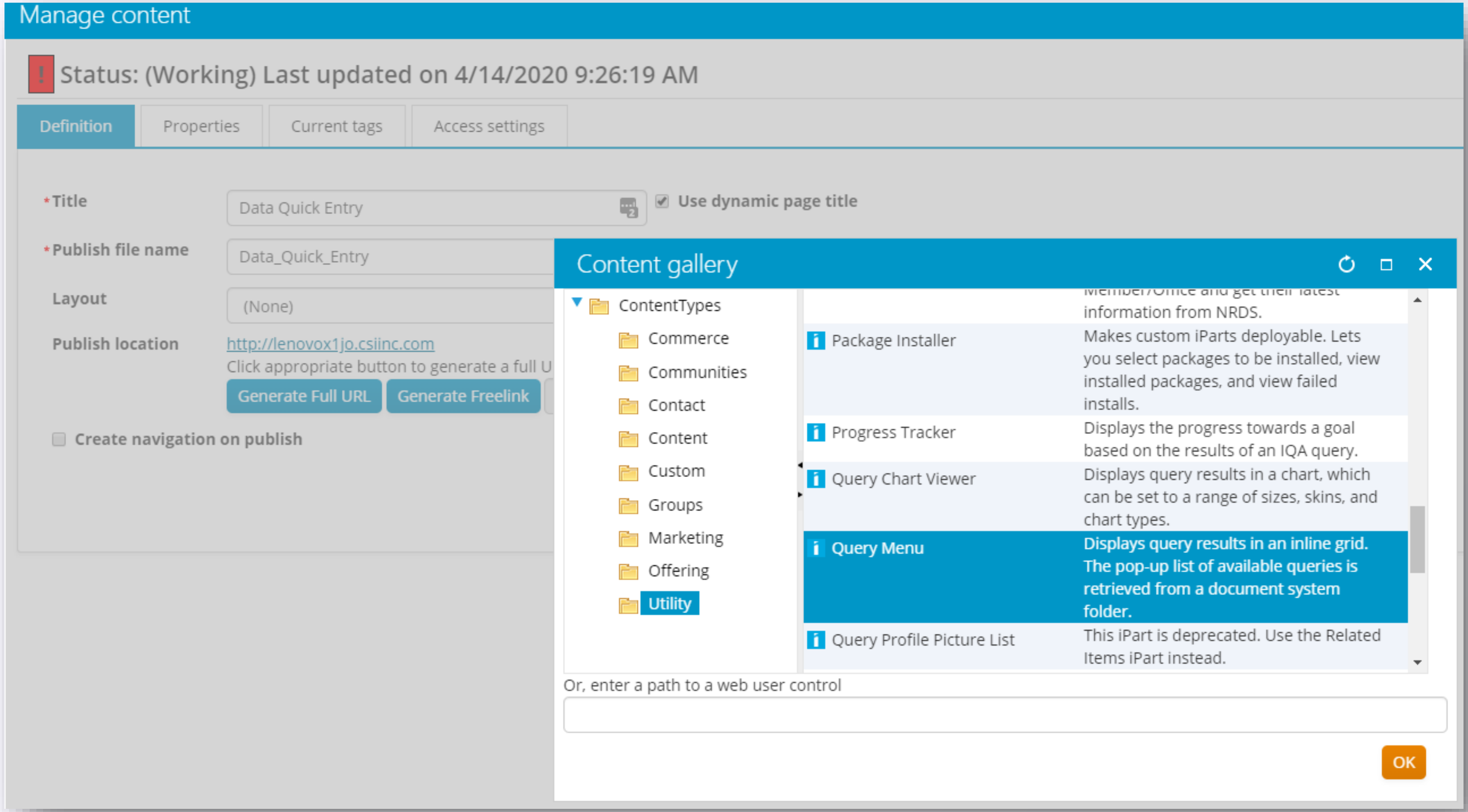
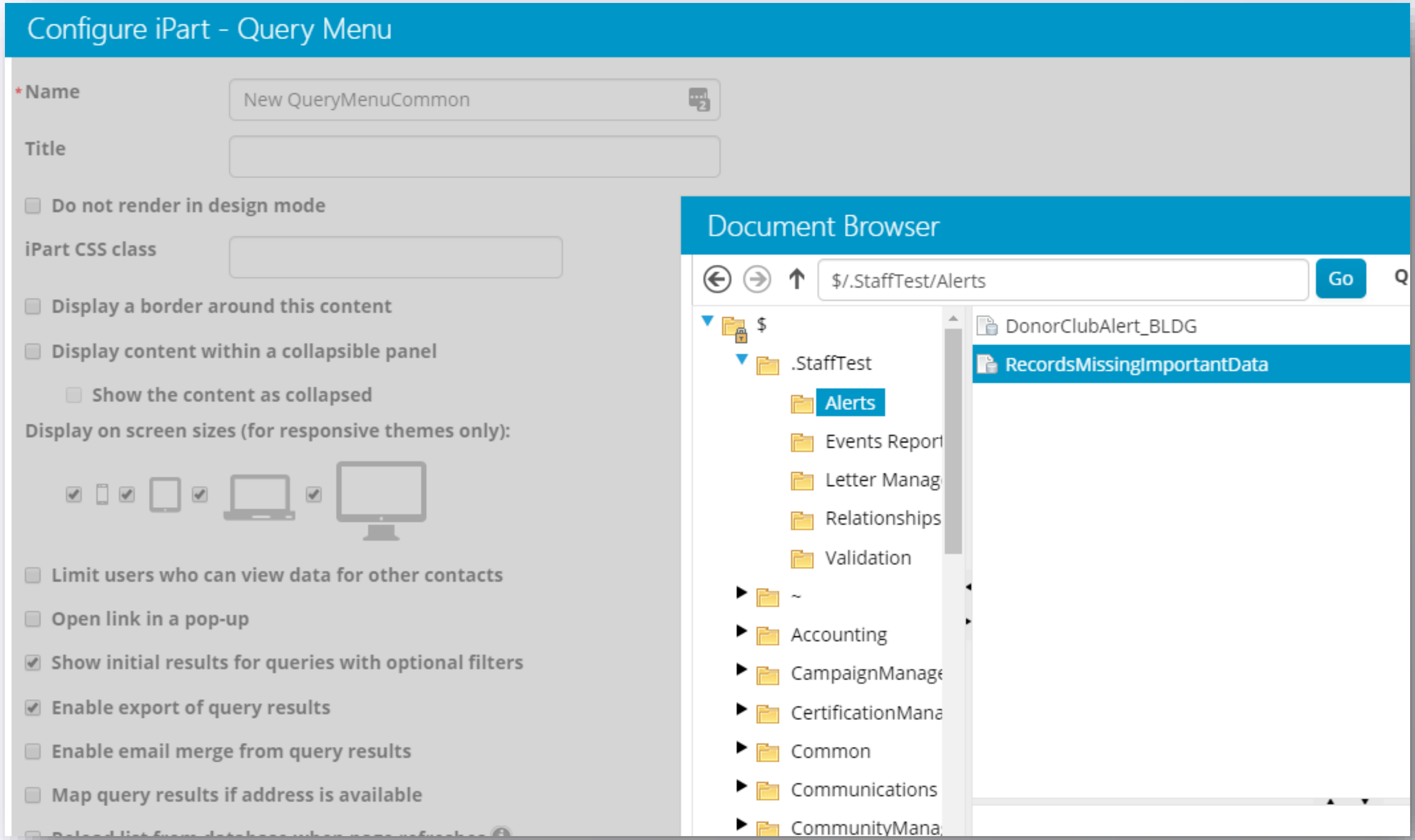
Quick Data Entry Step 3: Add Content/Query

- **Create a new content page**
- **Add Content item. Choosing from Utility folder > Query Menu**



Quick Data Entry Step 3: Add Content/Query

- **Choose query you built in step 2**
- **Configure iPart (exporting, optional filters, etc)**
- **Save & Publish**



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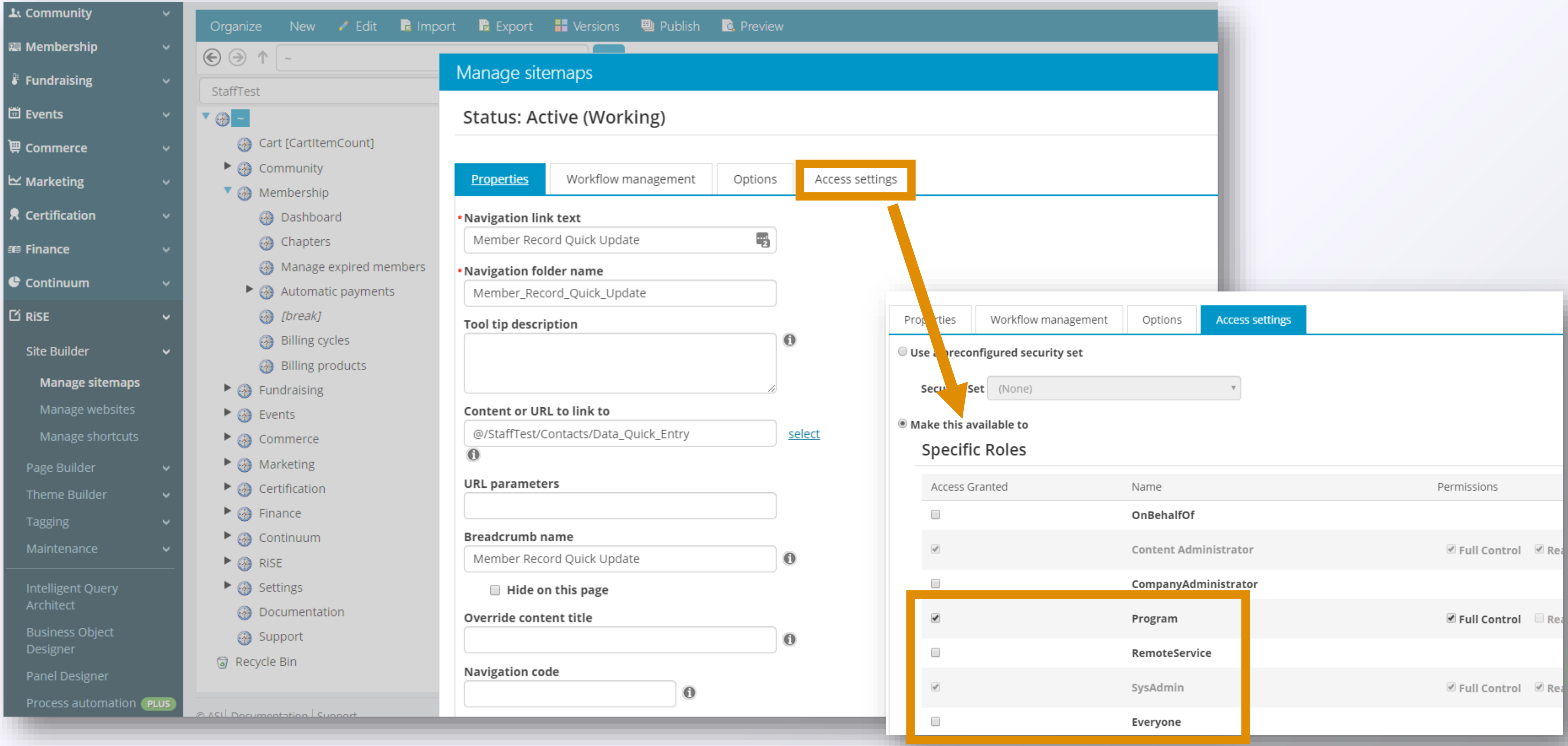
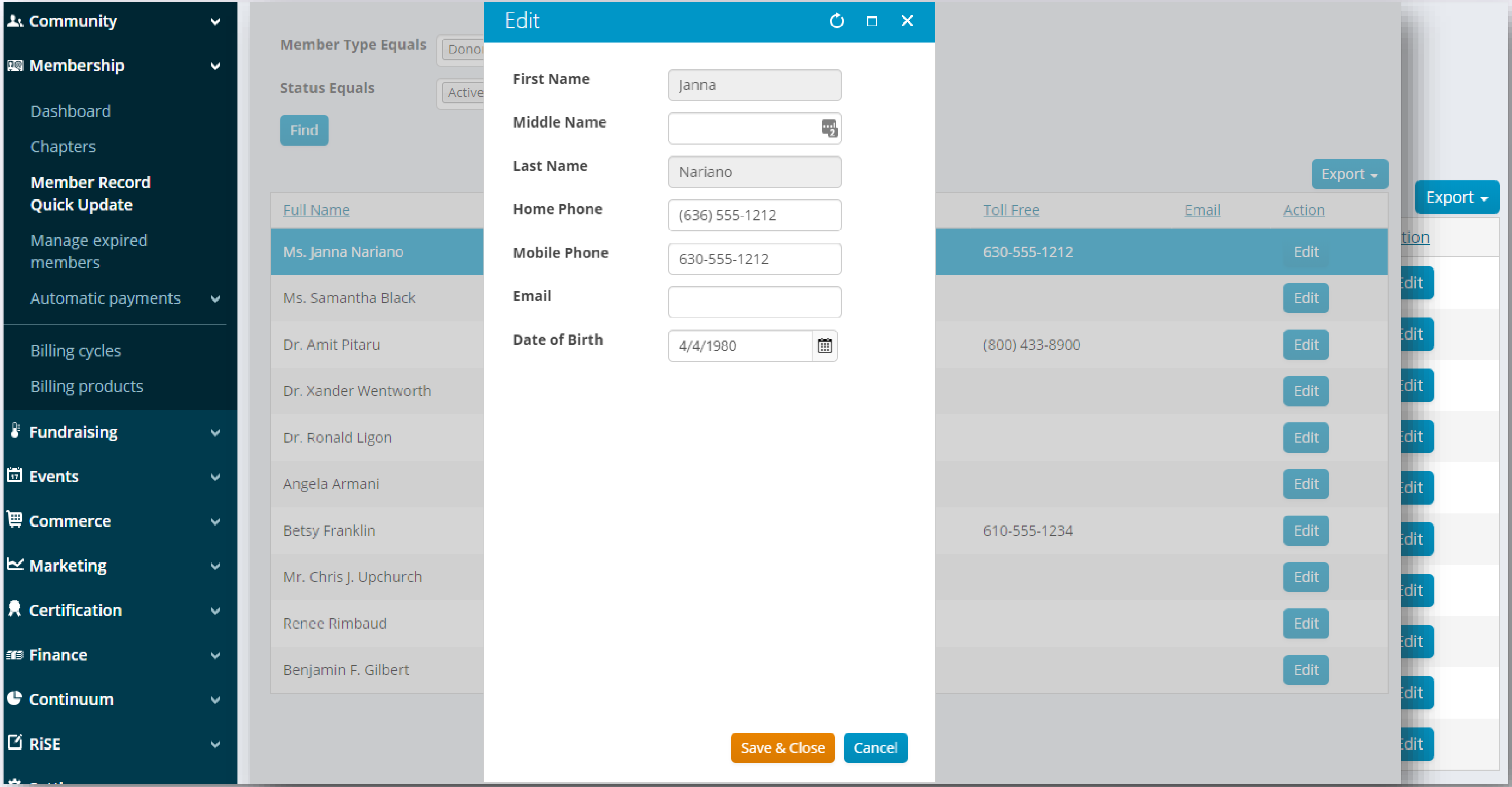
Quick Data Entry Step 4: Add Website Navigation Item



Quick Data Entry: Update Email Addresses for Donors



Blank Address Lines – Be Gone!

- iMIS tables were built to hold lots of data but we don't always use all of the fields.
- Addresses are one of those places.
- Some of us knew how to handle this in Crystal Reports or exports from Desktop but how do we deal with this in RiSE?
- I'm going to show you how to handle these blank lines in the address and it starts in the iQA of all places!

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Blank Address Lines – Be Gone!

Field	Data
CsContact.FullName	Morgan Freeman
CsAddress.Address1	123 Main St
CsAddress.Address2	Suite 200
CsAddress.Address3	Box 80
CsAddress.City	Beverly Hills
CsAddress.StateProvinc	
CsAddress.Zip	

What if the member doesn't have Address2 or Address3?

How do we show each scenario?

Field	Data – in reality
CsContact.FullName	Morgan Freeman
CsAddress.Address1	123 Main St
CsAddress.Address2	
CsAddress.Address3	
CsAddress.City	Beverly Hills
CsAddress.StateProvince	CA
CsAddress.Zip	90210

Blank Address Lines: Before & After

- **End goal: Email to members who haven't updated profile in last year**

Communication Preview

From info@alphaalphaalpha.org;
To Ms. Carol A. Hamilton <carolhamilton@imisdemo.com>;
Subject Take a moment to update your profile

Dear Ms. Carol A. Hamilton,

It has been a while since you have updated your profile. As a member
like to keep in touch with you!

Please review your information below, if updates need to be made, plea
us at 888-555-1212.

P.O. Box 472665
Somerville, NJ 08876-1245

We hope you are well and that we hear from you soon!

Communication Preview

From info@alphaalphaalpha.org;
To Francis Pearson <fpearson@imisdemo.com>;
Subject Take a moment to update your profile

Preview 3 of 777 Prev Next
Send All Now

Dear Francis Pearson,

It has been a while since you have updated your profile. As a member of Alpha Alpha Alpha, we would like to keep in touch with you!

Please review your information below, if updates need to be made, please visit your online profile or call us at 888-555-1212.

11044 Research Blvd.
Building B, Suite 300
Austin, TX 78759
United States

We hope you are well and that we hear from you soon!

Sincerely,

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Blank Address Lines: Step 1: Build Query 1

ProfileUpdatesWithinLastYear

Define | Run | Report | Group | Security

Summary | Sources | Filters | Display | Sorting

Add Source

Source	Type	
NetContact	Business Object	✖

Advanced options

- [ ] Use FORCE ORDER option
- [ ] Use NOLOCK locking hint
- [ ] Use join method for security enforc

ProfileUpdatesWithinLastYear

Define | Run | Report | Group | Security

Summary | Sources | Filters | Display | Sorting

Add Filter | Refresh

Where Property	Function	Comparison	Multiple	Value	Prompt		✖
Last Updated	None	Within Years		1	No		✖

Query options

- [ ] Require user to provide at least one valid value
- [ ] Limit the number of results returned

Query 1 defines members who have updated in past year

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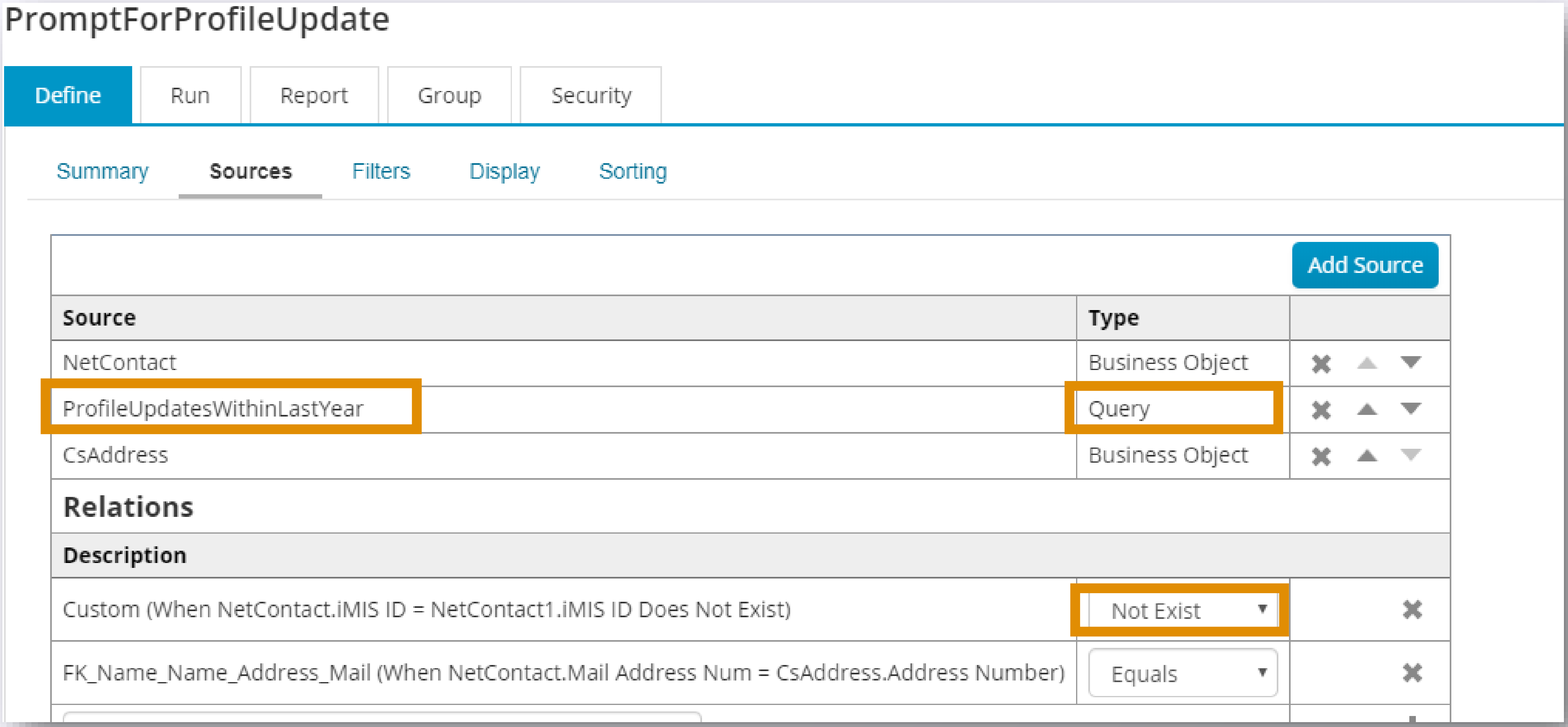
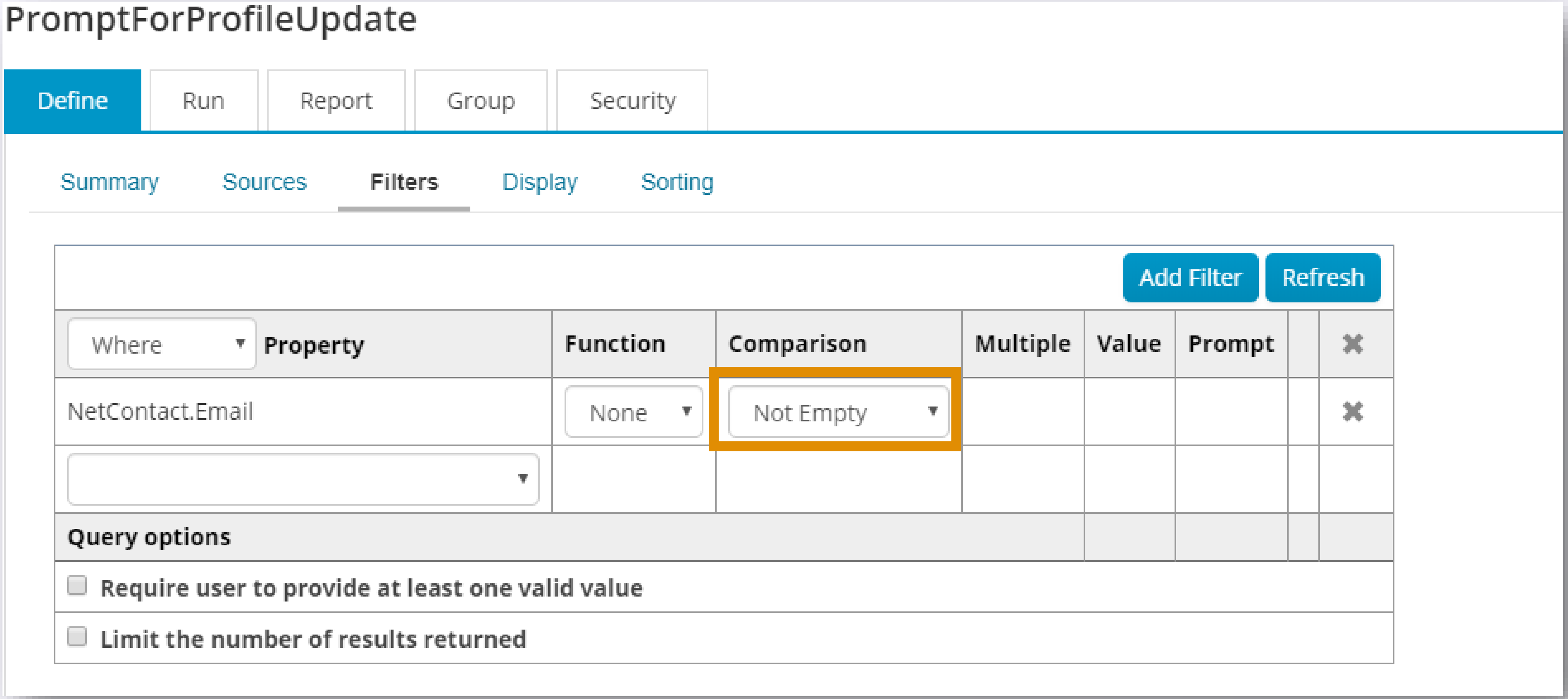
Blank Address Lines: Step 1: Build Query 2

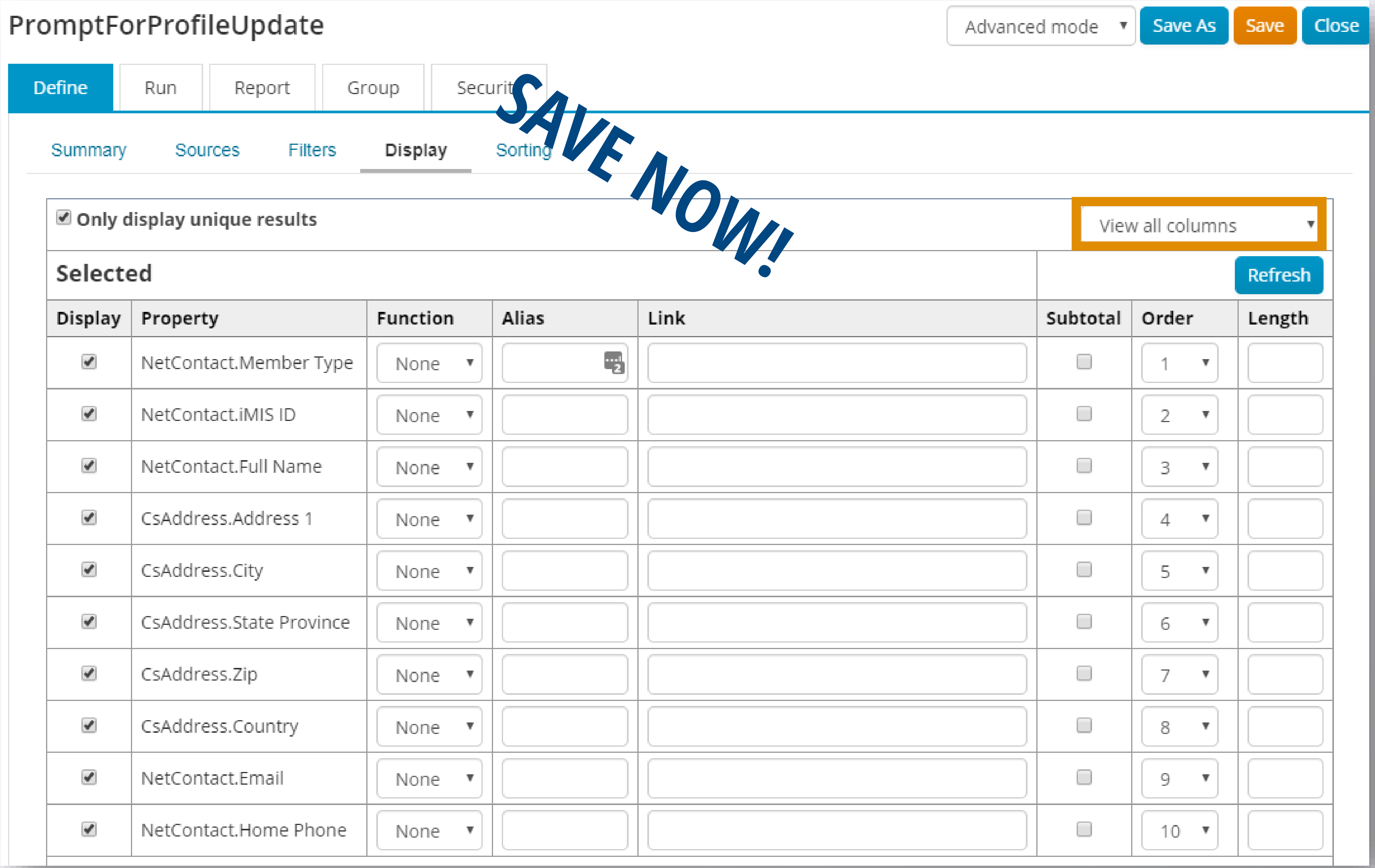
Query 2 finds members that do not exist in query 1 (those who have NOT updated in last year)



Blank Address Lines: Step 1: Build Query 2

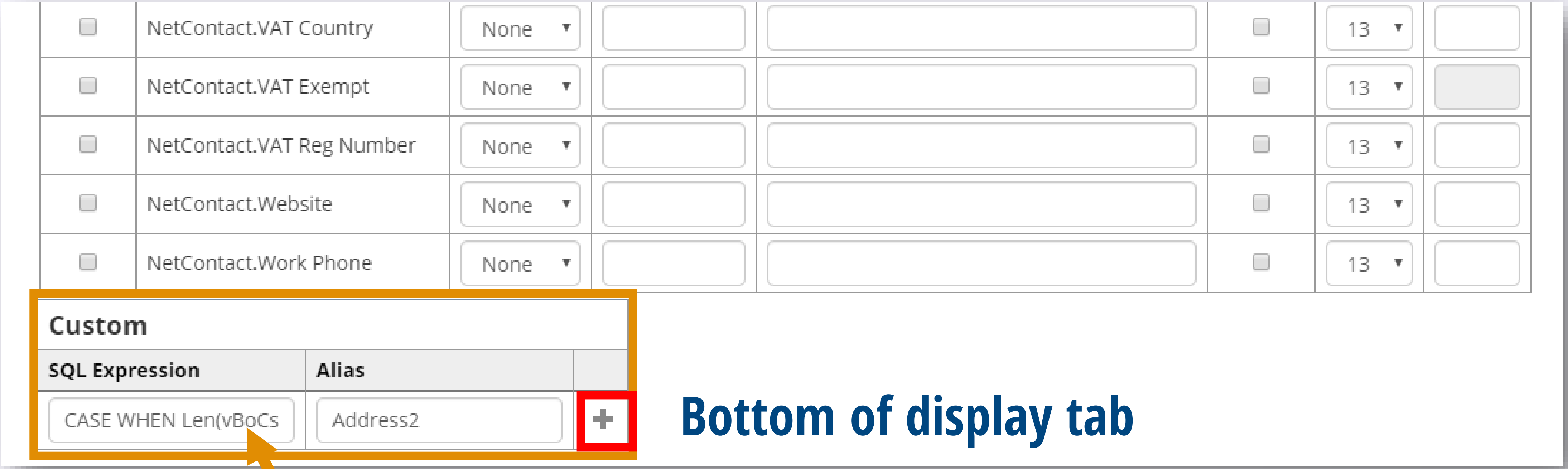


Blank Address Lines: Step 1: Build Query 2



- View all columns
- Select all fields to use in communication
- SAVE!

Blank Address Lines: Step 1: Build Query 2



Bottom of display tab

CASE WHEN Len(vBoCsAddress.Address2) <> '' THEN CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address2 ELSE '' END

Blank Address Lines: Breakdown the code

```
CASE WHEN Len(vBoCsAddress.Address2) <> '' THEN CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address2
ELSE '' END
```

Is the same as:

```
CASE
        WHEN
                Len(vBoCsAddress.Address2) <> ”
        THEN
                CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address2
        ELSE ”
END
```

Means the same as:

```
CASE
        WHEN
                Len(vBoCsAddress.Address2) <> ”
        THEN
                <BR/>vBoCsAddress.Address2
        ELSE ”
END
```

Blank Address Lines: Step 1: Build Query 2

PromptForProfileUpdate

Advanced mode | Save As | Save | Close

Define | Run | Report | Group | Security

Summary | Sources | Filters | Display | Sorting

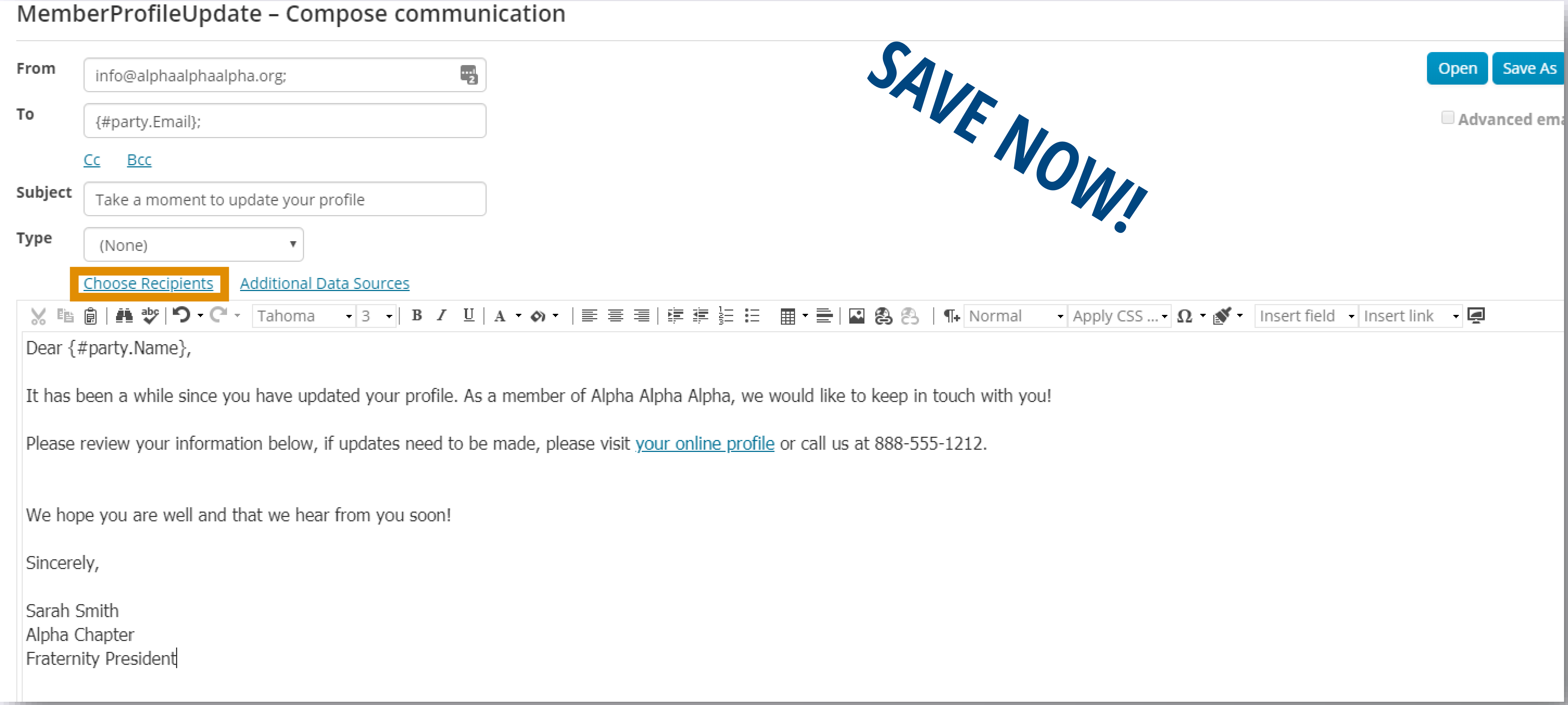
☑ **Only display unique results** — View all columns

Selected — Refresh

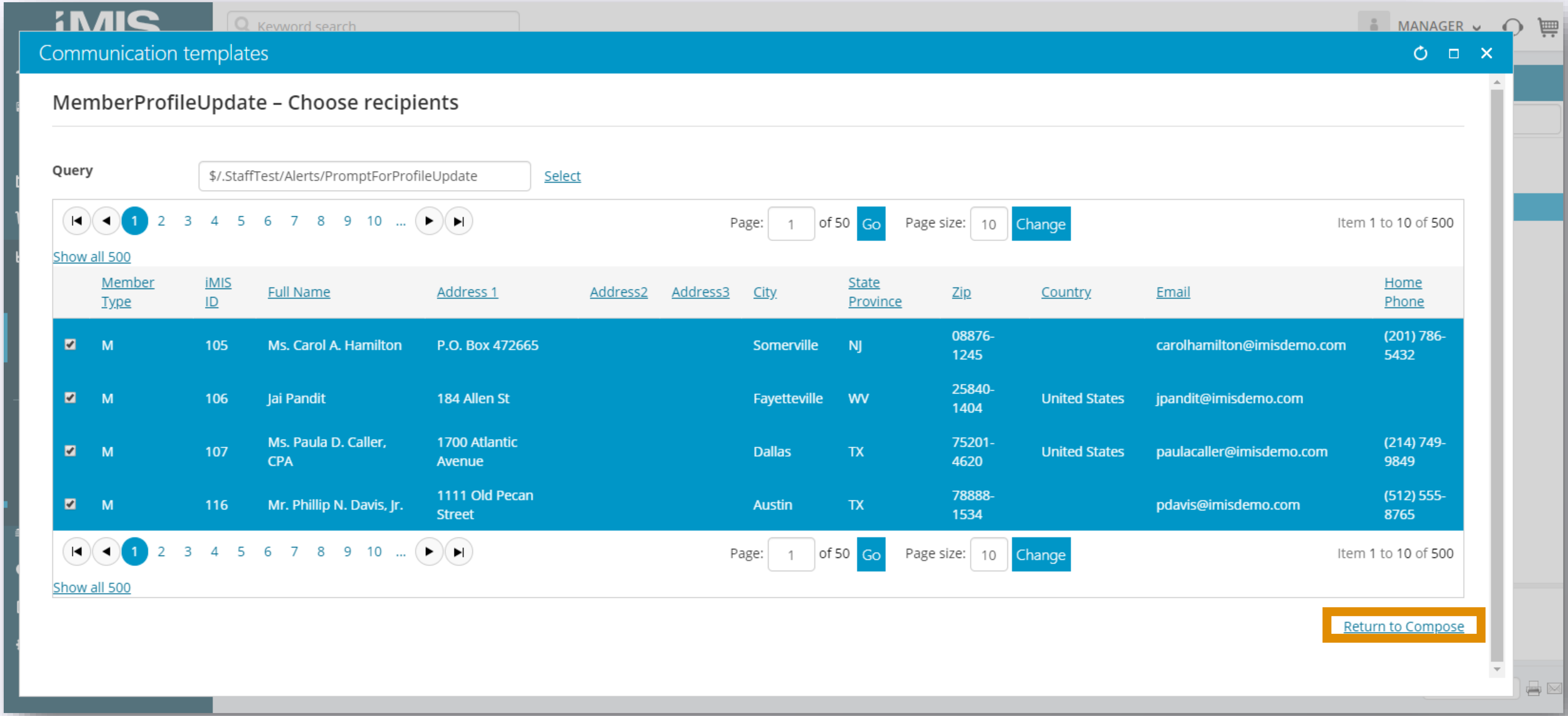
Display	Property	Function	Alias	Link	Subtotal	Order	Length
☑	NetContact.Member Type	None			☐	1	
☑	NetContact.iMIS ID	None			☐	2	
☑	NetContact.Full Name	None			☐	3	
☑	CsAddress.Address 1	None			☐	4	
☑	CASE WHEN Len(vBoCsAddress.Address2) > 0 THEN CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address2 ELSE '' END	None	Address2		☐	5	
☑	CASE WHEN Len(vBoCsAddress.Address3) > 0 THEN CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address3 ELSE '' END	None	Address3		☐	6	
☑	CsAddress.City	None			☐	7	
☑	CsAddress.State Province	None			☐	8	

Tip: Field names are listed in the Summary tab: SQL section

Blank Address Lines: Step 2: Build Communication



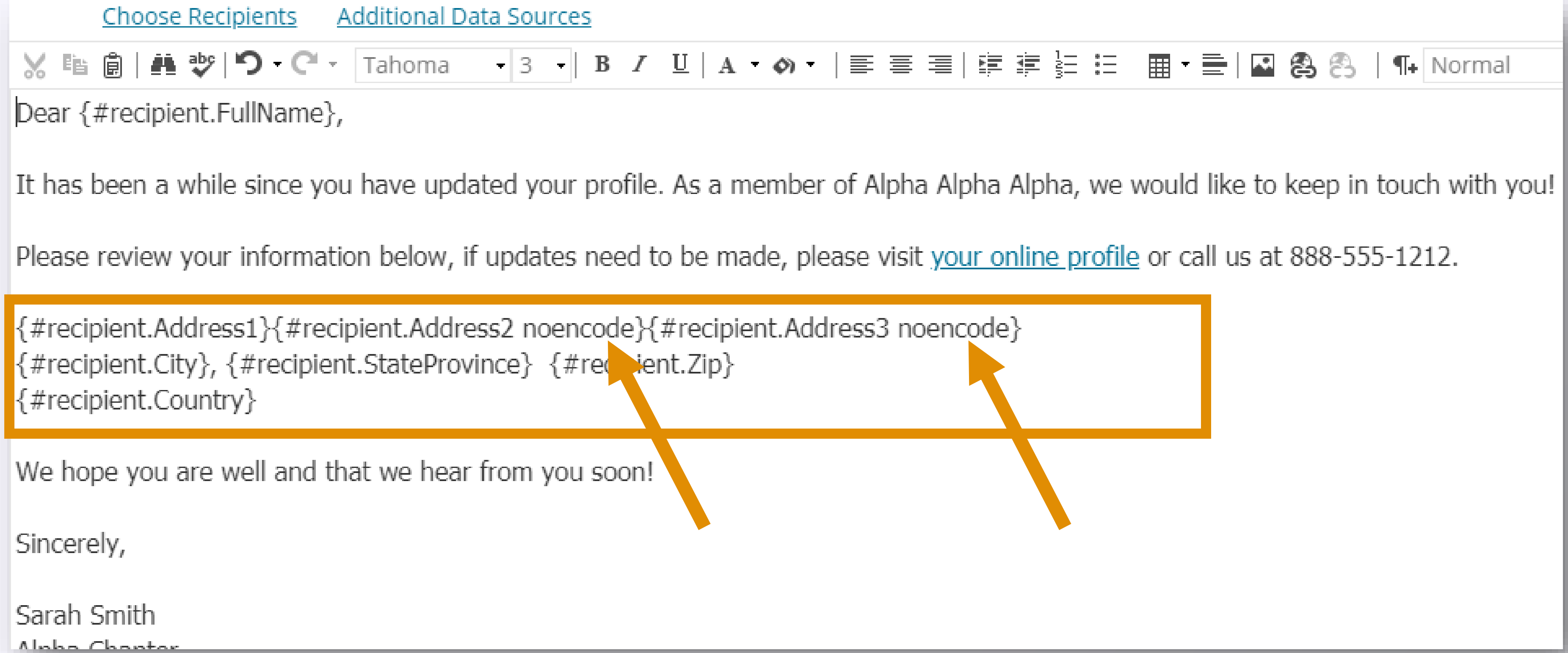
Blank Address Lines: Step 2: Build Communication



Tip: Use Return to Compose link, not X otherwise it's not saving.

Blank Address Lines: Step 2: Build Communication

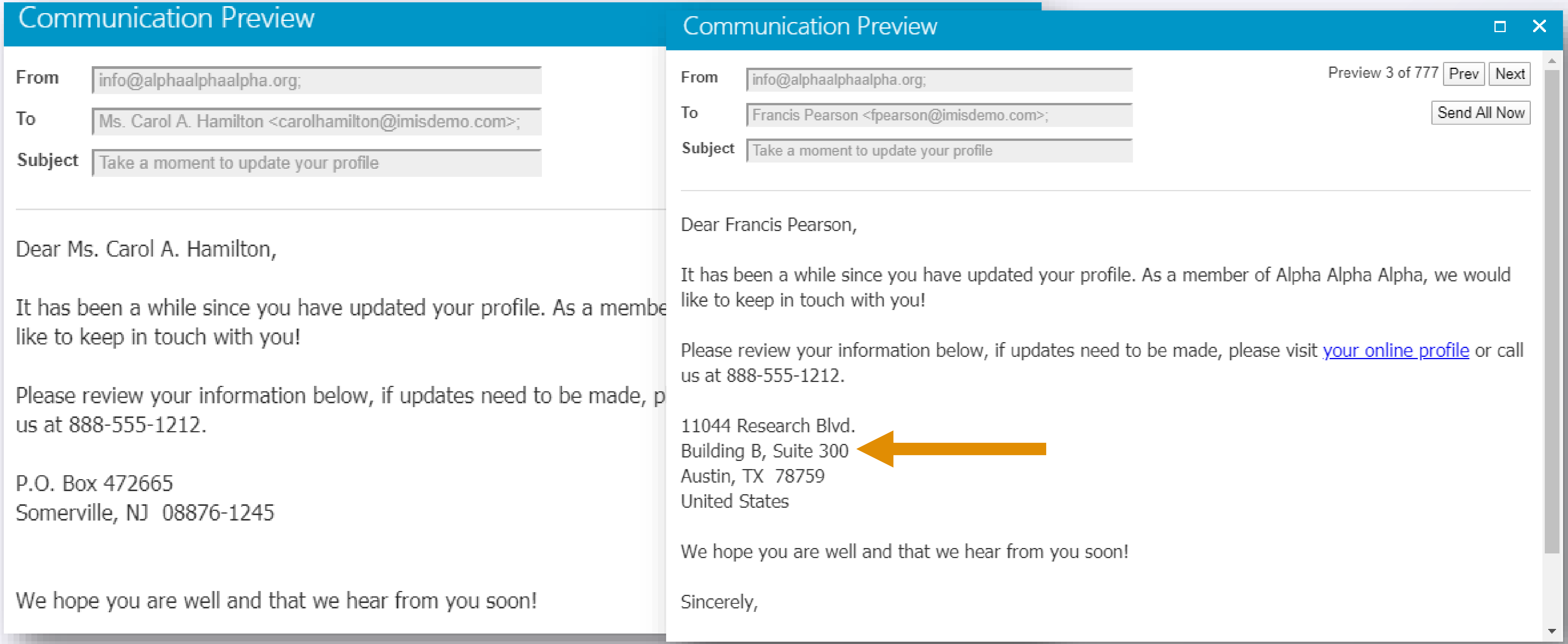
- **Drop in Address Fields, trusting line breaks built into iQA**
- **Make sure to use noencode so designer does not HTML encode the data**



Tip: https://help.imis.com/imis2017/Features/Marketing/Communications/Working_with_communication_templates.htm?Highlight=noencode

Blank Address Lines: Step 2: Build Communication

- **The CASE statement isn't just limited to this data.**
- **It works in many places for various IF/Then type scenarios.**
- **In iMIS 2020, we'll be able to use this in Expression Builder.**



Questions? Contact me!

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Fraternal Roundtable

COMPUTER SYSTEM innovations

Next Up...

Starting at 11:45am

Brown Bag Q&A
Open to all staff

Brown Bag Q&A
Foundation Focus

Brown Bag Q&A
RFM Focus

Fraternal Roundtable
COMPUTER SYSTEM innovations