

5 Cool Things You Can Do in RiSE

Jodi O'Toole with Angela Nimer



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?

The screenshot displays the iMIS RiSE interface. On the left is a dark sidebar with the iMIS logo and a list of modules: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, RiSE (highlighted), Site Builder, Business Object Designer, and Panel Designer. The main content area is titled 'Panel definition' and includes a 'Keyword search' bar. Below this are input fields for 'Panel name' and 'Panel description'. There are two radio button options: 'Show data sources that allow only one entry per object instance' (unselected) and 'Show data sources that allow multiple entries per object instance' (selected). A section titled 'Drag fields to output area' contains a list of activity objects with expandable arrows: Activity-ONLINEAPP, Activity-ORDER, Activity-PLEDGE, Activity-PROPOSED, Activity-REFUND, Activity-REQUEST, Activity-VOLUNTEER, AutoPayInstructionData, and AutoPayMemberInstruc. An orange arrow points from the top right towards the 'Drag fields to output area' section.



Goodnight 12:00AM! *Before & After*

Bill Bretschneider
Mobile
(605)377-6175

ID 20334
Member type Donor
Status Active

Print Info Public Profile Resolve Duplicates
Donate Order Register Email

About History Activity Giving

Requests

Page size: 20

Transaction Date	Requested Amt.	Gift Date	Result
5/28/2009 12:00 AM	250.00		
6/26/2007 12:00 AM	15.00		
7/28/2007 12:00 AM	15.00		
8/26/2007 12:00 AM	15.00		
9/27/2007 12:00 AM	15.00		
10/28/2007 12:00 AM	15.00		
7/30/2007 12:00 AM	10.00		
10/30/2007 12:00 AM	10.00		
10/30/2007 12:00 AM	10.00		
12/1/2007 12:00 AM	10.00		
12/1/2007 12:00 AM	10.00		
1/1/2008 12:00 AM	10.00		
1/30/2008 12:00 AM	15.00		



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

About History Activity Giving

Requests

Page size: 20

Show all 29

Transaction Date	Requested Amt.	Gift Date	Resulting Gift	Fund Code
5/18/2007	10.00	5/28/2009	250.00	
5/28/2007	10.00	6/26/2007	15.00	
6/29/2007	10.00	7/28/2007	15.00	
7/30/2007	10.00	8/26/2007	15.00	
10/30/2007	10.00	9/27/2007	15.00	
10/30/2007	10.00	10/28/2007	15.00	
12/1/2007	10.00	11/28/2007	15.00	
12/1/2007	10.00	12/28/2007	15.00	
1/1/2008	10.00	1/30/2008	15.00	
1/1/2008	10.00	2/29/2008	15.00	

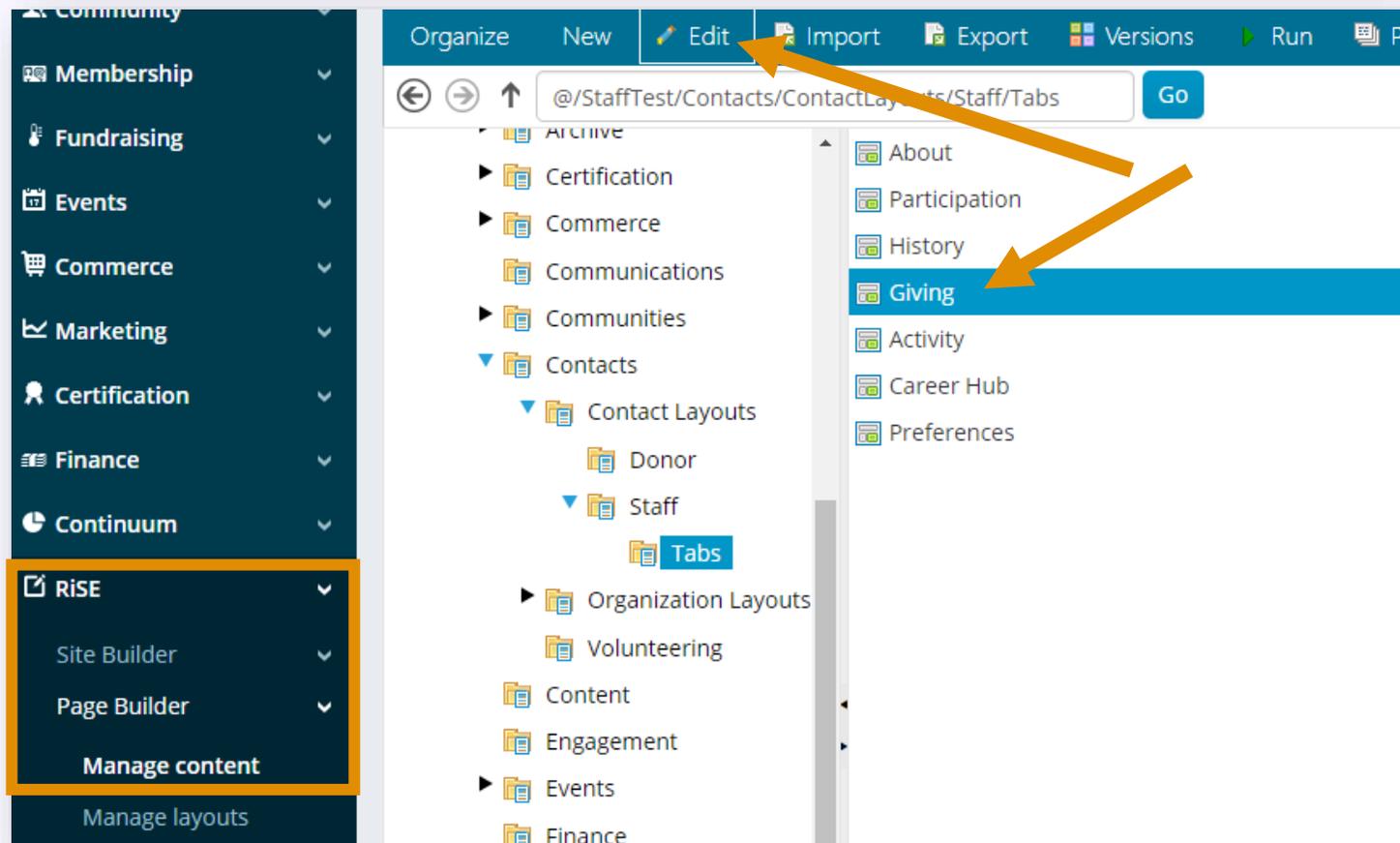
Print Info Public Profile Resolve Duplicates
Donate Order Register Email

Fix this in just TWO easy steps!



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)



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

- Choose Add Content
- Select Content HTML

The screenshot displays a web application interface for configuring a 'Giving' tab. The main window has a status bar at the top indicating 'Status: (Published)'. Below this, there are four tabs: 'Definition', 'Properties', 'Current tags', and 'Access settings'. The 'Definition' tab is active, showing the following configuration:

- Title:** Giving
- Publish file name:** Fundraising_Profile
- Layout:** SingleColumn
- Publish location:** <http://lenovo1jo.csiinc.com/DEMOIMIS/StaffTest/Cont>
Click appropriate button to generate a full URL or free link.
Generate Full URL **Generate Freelink**

Below the configuration, there are three sections:

- New PanelEditorCommon:** Requests
Multi-instance user defined window selected: Requests
- FR Profile Donor Data:** Donor info

A 'Content gallery' dialog box is open in the foreground, showing a tree view of content types. The 'ContentTypes' folder is expanded, and the 'Content Html' item is selected. The dialog box has a title bar with 'Content gallery' and standard window controls. The 'Content Html' item is highlighted in blue, and its description is shown below it: 'Content Html Inserts simple content: HTML content, such as the body of a blog post or a newsletter.'

At the bottom of the dialog box, there is a text input field with the placeholder text 'Or, enter a path to a web user control'.



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)

Configure iPart - Content Html

*Name

Display a border around this content



```
<!-- Removes the "12:00 AM" of anything that is datetime in queries that
have "HideMidnight" in the CSS classes box.
It also makes it so the time won't break into two lines -->
<script>
jQuery(document).ready(function() {
  var Has12 = jQuery('.HideMidnight td:contains("12:00 AM")');

  jQuery(Has12).each(function() {
    var text = jQuery(this).text();
    jQuery(this).html(text.replace("12:00 AM", ""));
    jQuery(this).css("word-break", "keep-all");
  });
});
</script>
```

Design **HTML** Previ...



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

- Choose Configure on the panel you want to hide

The screenshot shows a configuration interface for a panel named "Giving". At the top, there is a status bar with a red exclamation mark icon, the text "Status: (Working) Last updated on 4/9/2020 11:20:33 AM", and a dropdown arrow. Below this is a navigation bar with four tabs: "Definition" (selected), "Properties", "Current tags", and "Access settings".

The main configuration area for "Giving" includes:

- *Title:** A text input field containing "Giving" and a "Use dynamic page title" checkbox which is unchecked.
- *Publish file name:** A text input field containing "Fundraising_Profile".
- Layout:** A dropdown menu set to "SingleColumn" with a grid icon to its right.
- Publish location:** A text input field containing the URL "http://lenovox1jo.csiinc.com". Below it is the instruction "Click appropriate button to generate a full URL or free link to copy elsewhere." and two buttons: "Generate Full URL" and "Generate Freelink".

At the bottom of the configuration area, there is a panel titled "New PanelEditorCommon". A yellow arrow points to a menu of actions: "Configure", "Copy To", "Move To", "Connect", "Minimize", and "Remove". A tooltip box is open over the "Configure" button, displaying the text "Configures 'New PanelEditorCommon'".

Below the configuration area, there is a section titled "Requests" with the text "Multi-instance user defined window selected: Requests".



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

- Add the CSS Class (function) to the iPart

Configure iPart - Panel Editor

*Name

Title

Do not render in design mode

iPart CSS class

Display a border around this content

Display content within a collapsible panel

Show the content as collapsed

Display on screen sizes (for responsive themes only):

Panel



Goodnight 12:00AM! *Bye!*

Voila!

Bill Bretschneider
Mobile
(605)377-6175

ID: 20334
Member type: Donor
Status: Active

Print Info Public Profile Resolve Duplicates

Donate Order Register Email

About History Activity **Giving**

Requests

Page size: 20

Show all 29

Transaction Date	Requested Amt.	Gift Date	Resulting Gift	Fund Code
5/18/2007	10.00	5/28/2009	250.00	
5/28/2007	10.00	6/26/2007	15.00	
6/29/2007	10.00	7/28/2007	15.00	
7/30/2007	10.00	8/26/2007	15.00	
10/30/2007	10.00	9/27/2007	15.00	
10/30/2007	10.00	10/28/2007	15.00	
12/1/2007	10.00	11/28/2007	15.00	
12/1/2007	10.00	12/28/2007	15.00	
1/1/2008	10.00	1/30/2008	15.00	
1/1/2008	10.00	2/29/2008	15.00	

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?

Business Object Designer

Activity_Request Publish

Definition **Properties** Database

Property Name	Data Type	Length	Scale	Key	Required
TICKLER_DATE	DBTimeStamp			<input type="checkbox"/>	<input type="checkbox"/>
TIME_STAMP	LongVarBinary			<input type="checkbox"/>	<input type="checkbox"/>
TRANSACTION_DATE	DBTimeStamp			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UF_1	VarChar	255		<input type="checkbox"/>	<input checked="" type="checkbox"/>
UF_2	VarChar	255		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Definition **Display** Values

Available to UI? Yes No

Prompt for field: Transaction Date

Prompt resource key:

Display control: Calendar

Display mask: 4/21/2020 10:27:47 AM (Default)

Format Specification:

The following are normally left blank unless overriding the defaults

Override overall CSS class:

Display control: Calendar

Display mask: 4/21/2020 (Short date)

Format Specification:

Save Save As Close



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.

Community

- Dashboard
- Engagement
- Find contacts
- Add contact**
- Manage duplicates **PLUS**
- Committees
- Communities
- Volunteers
- Security
- Membership**
- Fundraising
- Events
- Commerce

Create Non Member Record

Add Contact Additional Information

* Member Type Non Member

Status Active

Category (None)

- (None)
- OTH
- PAR
- VND



Add Contact Additional Information

* Member Type Non Member

Status Active

Category ? (None)

Category choices for non members are Other, Parent or Vendor.



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

Labels **Inputs**

The screenshot shows a web application interface. On the left is a dark sidebar menu with categories: Community, Membership, Fundraising, Events, and Commerce. The main content area is titled 'Create Non Member Record' and has two tabs: 'Add Contact' and 'Additional Information'. The 'Additional Information' tab is active. Below the tabs are three form fields: 'Member Type' (with a red asterisk), 'Status', and 'Category'. The 'Member Type' field has a dropdown menu open, showing options: '(None)', '(None)', 'OTH', 'PAR', and 'VND'. Two orange arrows point from the text 'Labels' and 'Inputs' above to the 'Member Type' label and its dropdown menu respectively.

Community

Dashboard

Engagement

Find contacts

Add contact

Manage duplicates PLUS

Committees

Communities

Volunteers

Security

Membership

Fundraising

Events

Commerce

Create Non Member Record

Add Contact Additional Information

*Member Type Non Member

Status Active

Category (None)

(None)

OTH

PAR

VND



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

- Right Click “Category” (label)
- Choose Inspect

The screenshot displays a web application interface for creating a non-member record. On the left is a dark sidebar with navigation options: Community, Dashboard, Engagement, Find contacts, Add contact, Manage duplicates (PLUS), Committees, Communities, Volunteers, Security, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, and Continuum. The main content area is titled 'Create Non Member Record' and has two tabs: 'Add Contact' and 'Additional Information'. The 'Additional Information' tab is active, showing fields for 'Member Type' (set to 'Non Member'), 'Status' (set to 'Active'), and 'Category'. A right-click context menu is open over the 'Category' field, with the 'Inspect' option highlighted. The menu items include: Back (Alt+Left Arrow), Forward (Alt+Right Arrow), Reload (Ctrl+R), Save as... (Ctrl+S), Print... (Ctrl+P), Cast..., View page source (Ctrl+U), and Inspect (Ctrl+Shift+I).

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

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

The screenshot displays a web application interface for creating a non-member record. The form includes fields for 'Member Type' (set to 'Non Member'), 'Active' status, and 'Category' (set to '(None)'). A right-click context menu is open over the 'Category' label, with the 'Copy element' option highlighted by an orange arrow. The browser's developer tools are visible at the bottom, showing the HTML structure of the selected label: `<label for="ct101_TemplateBody_WebPartManager1_gwpciNewContentCollectionOrganizerCommon_ciNewContentCollectionOrganizerCommon_NewPanelEditorCommon_panelEditor_CsContact__Category">Category</label> == $0`.

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



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

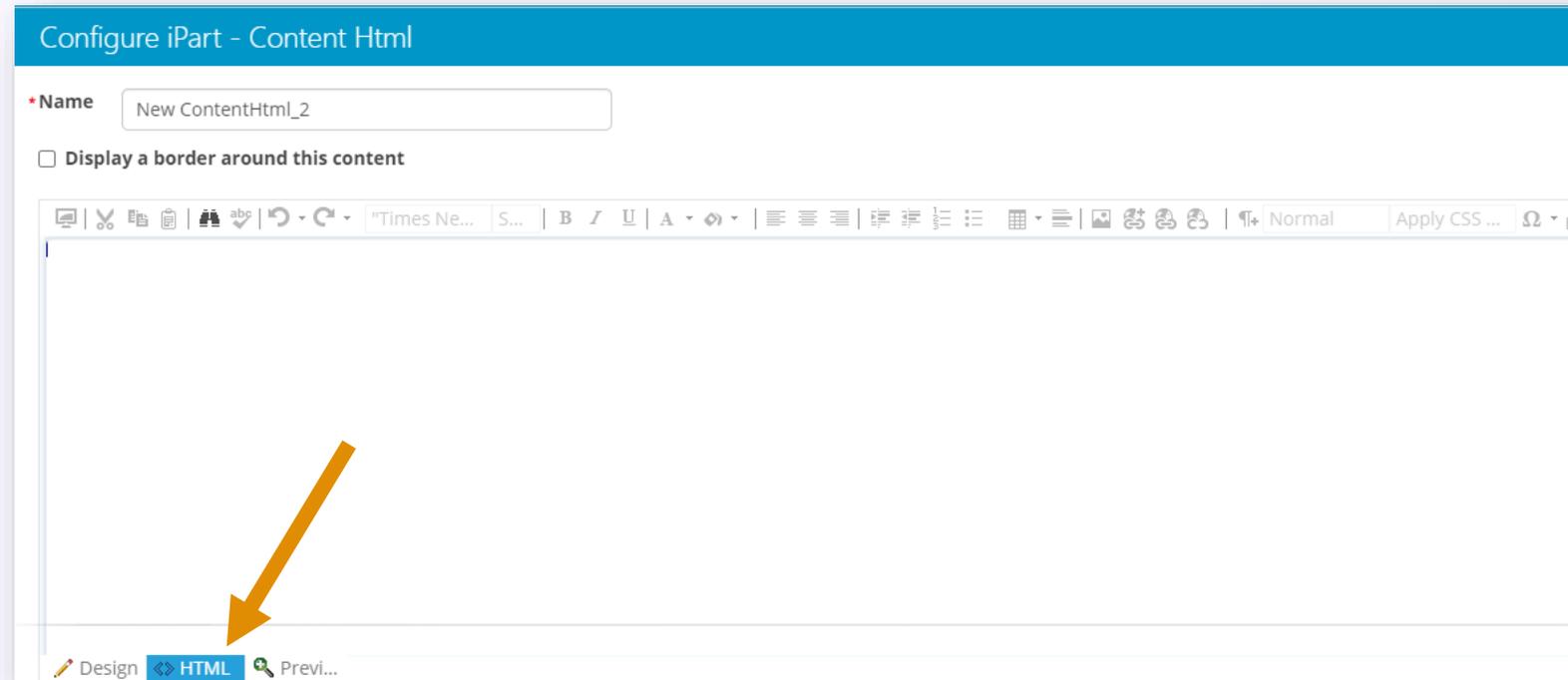
- **Code below is example**
- **Highlighted section between quotes is the value to use**

```
<label  
for="ctl01_TemplateBody_WebPartManager1_gwpciNewC  
ontentCollectionOrganizerCommon_ciNewContentCollecti  
onOrganizerCommon_NewPanelEditorCommon_panelEdi  
tor_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(' ');
  // **** 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>
```



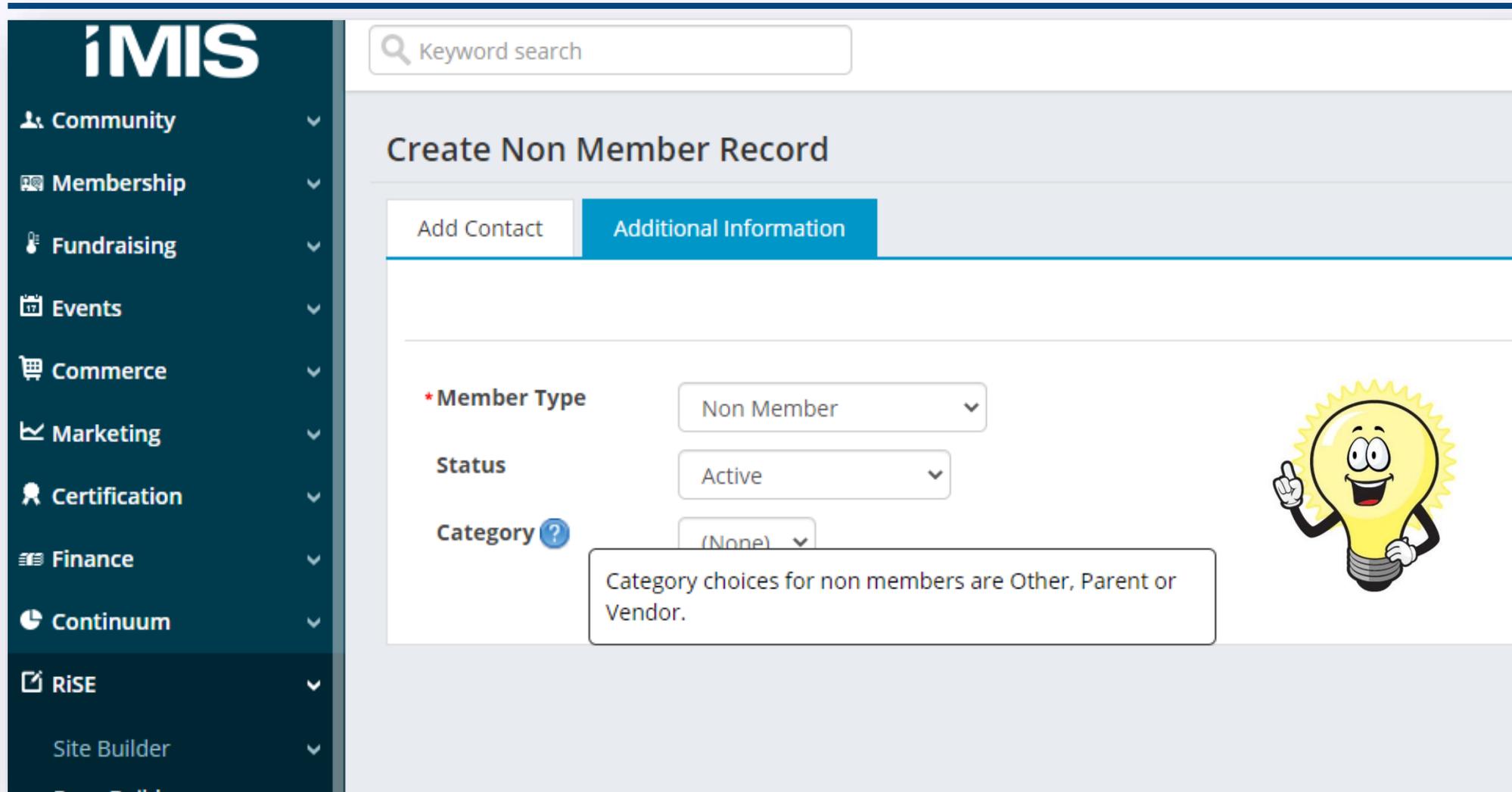
What does it mean? *Step 2: Add Function to Content*

- **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_gwpciNewContentCollectionOrga
nizerCommon_ciNewContentCollectionOrganizerCommon_NewPanelEdito
rCommon_panelEditor_CsContact__Category "]"').append(' ');
// **** End: Add Form Items to Display Tooltip
```



What does it mean? NOW I KNOW!



The screenshot displays the iMIS software interface. On the left is a dark blue navigation sidebar with the iMIS logo and menu items: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, RiSE, and Site Builder. The main content area is titled 'Create Non Member Record' and features a search bar at the top. Below the title are two tabs: 'Add Contact' and 'Additional Information', with the latter being active. The form contains three dropdown menus: 'Member Type' set to 'Non Member', 'Status' set to 'Active', and 'Category' set to '(None)'. A tooltip box is positioned over the 'Category' dropdown, containing the text: 'Category choices for non members are Other, Parent or Vendor.' To the right of the form is a cartoon lightbulb character with a smiling face, arms, and legs, pointing upwards.



Who am I talking to? *Before & After*

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

The image shows two side-by-side screenshots of a member profile for Francis DeMonet. The left screenshot shows the profile before a donation, with a large orange question mark overlaid. The right screenshot shows the profile after a donation, with a callout box stating "This member is a CORNERSTONE donor." The callout box is highlighted with an orange border and an arrow pointing to the member's address.

Francis DeMonet
[Ten Green Floral](#)
Mobile (864)453-5384

ID 198
Member type Regular Member
Status Active

Print Info Public Profile
Resolve Duplicates
Donate Order Register Email

Membership

IMIS ID	198
Member type	Regular Member
Billing category	
Chapter	West Chapter
Member status	New
Status changed	8/12/2008
Last updated by	FADMIN

Addresses

Address	+
246 Andersontown Road Ext UNITED STATES Show map (717) 555-8726	

Francis DeMonet
[Ten Green Floral](#)
Mobile (864)453-5384

ID 198
Member type Regular Member
Status Active

Print Info Public Profile
Resolve Duplicates
Donate Order Register Email

Membership

IMIS ID	198	Major key	
Member type	Regular Member	Status	Active
Billing category		Member since	
Chapter	West Chapter	Paid through	
Member status	New	Billed through	2/1/201
Status changed	8/12/2008	Date added	8/12/20
Last updated by	FADMIN	Last updated	12/3/20

Addresses

Address	+
246 Andersontown Road Ext Dover, PA 17315-1750 UNITED STATES Show map (717) 555-8726	

This member is a CORNERSTONE donor.



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**

DonorClubAlert_BLDG

Define Run Report Group Security

Summary Sources **Filters** Display Sorting

Add Filter Refresh

Where	Property	Function	Comparison	Multiple	Value	Prompt		
	CsActivityBasic.Activity Type	None	Equal	<input type="checkbox"/>	DONORCLUB	No	<input type="text"/>	✕ ▲ ▼
	CsActivityBasic.Id	None	Equal		"@SelectedID"	No	<input type="text"/>	✕ ▲ ▼
	Product_FR.Only For Fund	None	Equal		BLDG	No	<input type="text"/>	✕ ▲ ▼
Query options					Value			
<input type="checkbox"/> Require user to provide at least one valid value								
<input checked="" type="checkbox"/> Limit the number of results returned					<input type="text" value="1"/>			



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
<input checked="" type="checkbox"/>	CsActivityBasic.Product Code	None ▾	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>	1 ▾	<input type="text" value=""/>

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

[Refresh](#)

Priority	Property	Direction	
1 ▾	CsActivityBasic.Transaction Date	Descending ▾	✕
2 ▾	<input type="text" value=""/>	Ascending ▾	+



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

- What do you want to it to say?

New Task

Enabled

Name

Description

Type

Conditions | Alert | Data sources

You can add a data source as a condition to restrict the task to run only if the data source returns results. The task will run if any of the data sources returns results, or if there are no conditions.

Data Source	Type
There are no data sources.	

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 it to say?

New Task

Enabled

*Name

Description

Type

Conditions | Alert | Data sources

You can add a data source as a condition to restrict t

Data Source

There are no data sources.

Add Data Source

*Data source name

*Query [select](#)
[Create source query](#)

Save Cancel



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

- What do you want it to say?

Building_DonorClub

Enabled

*Name

Description

Type

Conditions | Alert | **Data sources**

Data Source	Type
DonorClub_Building	IQA Query



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

- What do you want to it to say?

Building_DonorClub

Enabled

Name: Building_DonorClub

Description: For Building Donor Club, not Annual Donor Club level

Type: Alert display

Conditions | **Alert** | Data sources

Data sources: DonorClub_Building x

Add to alert set: Staff account page alerts x

Display personalized message if a contact is viewing their own record

Alert Message

Default

Rich text editor toolbar: Bold, Italic, Underline, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Table, Table of contents, Undo, Redo, Font size, Font family, Font weight, Font style, Font color, Text background color, Insert data source field, Insert link

Alert Message: This member is a **{#DonorClub Building.ProductCode}** donor.



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

The screenshot displays the 'Account Page Staff' configuration page in the RiSE Page Builder. The configuration includes fields for Title, Publish file name, Layout, and Publish location. Below these fields are buttons for 'Generate Full URL' and 'Generate Freelink'. A 'Content gallery' overlay is open, showing a tree view of content types under 'ContentTypes'. The 'Alert Display' content type is selected and highlighted in blue. The 'Alert Display' description reads: 'Display alerts'. Other content types listed include 'AddThis For Social Networking', 'Advanced Accounting Console', 'Advanced Search', 'Change History Display', 'Common Search', 'Communication Creator', and 'Embedded Web Page'. The background shows a 'Mini Profile' for a 'MANAGER' with a mobile number (244)042-6169, ID 194, and member type 'Regular Member'.



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

- **Where does this go?**

Configure iPart - Alert Display

Name

Title

Do not render in design mode

iPart CSS class

Display a border around this content

Display content within a collapsible panel

Show the content as collapsed

Display on screen sizes (for responsive themes only):

Alert set

Available	Selected
Quick Start Member alerts	
Specific event dashboard	
Staff organization account page alerts	
Staff specific event alerts	
Volunteers Dashboard	
Waitlist for selected function	

Hide when there are no alerts

No alerts message



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

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

Francis DeMonet

[Ten Green Floral](#)

Mobile
(864)453-5384



ID 198

Member type Regular Member

Status Active

[Print Info](#) [Public Profile](#) [Resolve Duplicates](#)

[Donate](#) [Order](#) [Register](#) [Email](#)

 Primary email is missing

 **This member is a
CORNERSTONE donor.**

[About](#) [History](#) [Activity](#) [Giving](#)

Membership

IMIS ID	198	Major key	
Member type	Regular Member	Status	Active
Billing category		Member since	
Chapter	West Chapter	Paid through	
Member status	New	Billed through	2/1/2016
Status changed	8/12/2008	Date added	8/12/2008
Last updated by	FADMIN	Last updated	12/3/2015 11:07 AM

Addresses

Address	
246 Andersontown Road Ext Dover, PA 17315-1750 UNITED STATES Show map (717) 555-8726	



Quick Data Entry

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



Quick Data Entry Step 1: Create Panel

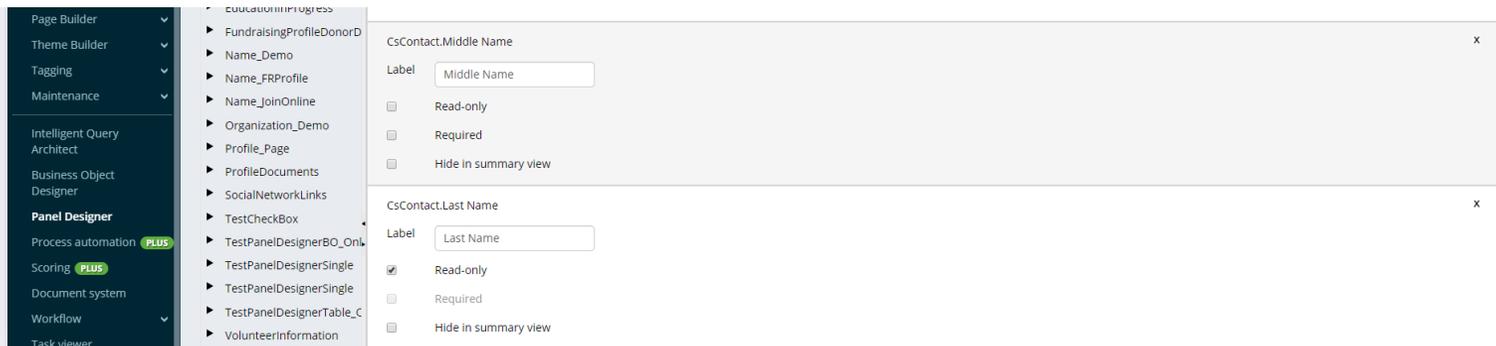
- Create a new Panel definition
- Save Panel; Record the Panel Definition ID



The screenshot shows the iMIS Panel Designer interface. The browser address bar displays the URL: `lenovox1jo.csinc.com/demioimis/StaffTest/RISE/Panel_Designer/iParts/Common/PanelEditor/PanelDesignDialog.aspx?PanelDefinitionId=2371eb08-b384-4301-86de-4e7f78c79f7c`. The page title is "Panel definition". The form includes the following fields and options:

- Panel name:** DataEntryQuick
- Panel description:** (empty text box)
- Options:**
 - Show data sources that allow only one entry per object instance
 - Show data sources that allow multiple entries per object instance
- Drag fields to layout area:** (empty area)
- Create source:** (button)

ner/iParts/Common/PanelEditor/PanelDesignDialog.aspx?PanelDefinitionId=2371eb08-b384-4301-86de-4e7f78c79f7c



The screenshot shows the iMIS Panel Designer interface. The left sidebar lists various tools, with "Panel Designer" highlighted. The main area displays a list of data sources and their corresponding fields:

- EducationProgress**
- FundraisingProfileDonorD**
- Name_Demo**
- Name_FRProfile**
- Name_JoinOnline**
- Organization_Demo**
- Profile_Page**
- ProfileDocuments**
- SocialNetworkLinks**
- TestCheckBox**
- TestPanelDesignerBO_Onl**
- TestPanelDesignerSingle**
- TestPanelDesignerSingle**
- TestPanelDesignerTable_C**
- VolunteerInformation**

The right pane shows the configuration for two data sources:

- CSContact.Middle Name:** Label: Middle Name, Read-only, Required, Hide in summary view.
- CSContact.Last Name:** Label: Last Name, Read-only (checked), Required, Hide in summary view.

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

RecordsMissingImportantData

Define Run Report Group Security

Summary Sources Filters Display Sorting

Source	Type	
CsContactBasic	Business Object	✕

Add Source

Advanced options

- Use FORCE ORDER option
- Use NOLOCK locking hint
- Use join method for security enforcement



Quick Data Entry Step 2: Create Query

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

RecordsMissingImportantData

Define Run Report Group Security

Summary Sources **Filters** Display Sorting

Add Filter Refresh

Where	Property	Function	Comparison	Multiple	Value	Prompt		X
	Email	None	Empty					X ▲ ▼
	Member Type	None	Equal	<input checked="" type="checkbox"/>	Donor X	Optional	2	X ▲ ▼
	Status	None	Equal	<input checked="" type="checkbox"/>	Active X	Optional		X ▲ ▼
	Work Phone	None	Not Empty					X ▲ ▼

Query options

Require user to provide at least one valid value

Limit the number of results returned



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
<input checked="" type="checkbox"/>	iMIS Id	None ▼	code_id 	
<input checked="" type="checkbox"/>	Full Name	None ▼		
<input checked="" type="checkbox"/>	Work Phone	None ▼		
<input checked="" type="checkbox"/>	Home Phone	None ▼		
<input checked="" type="checkbox"/>	Toll Free	None ▼		
<input checked="" type="checkbox"/>	Email	None ▼		
<input checked="" type="checkbox"/>	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) + '/' + 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"><a style="display: block; text-decoration: none; color: #ffffff !important; href="javascript:ShowDialog_NoReturnValue('~ /iparts/Common/PanelEditor/PanelEditDialog.aspx?PanelDefinitionId=2371eb08-b384-4301-86de-4e7f78c79f7c&AllowEdit=True&ID=20978&TemplateType=E', null, '450', '780', 'Edit', '', 'E', null, null, false, false, null, null)">Edit</a></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>



Quick Data Entry Step 3: Add Content/Query

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

The screenshot shows the 'Manage content' interface with a 'Content gallery' dialog box open. The dialog box displays a tree view of content types, with 'Utility' selected. The 'Query Menu' item is highlighted in blue. The description for 'Query Menu' is: 'Displays query results in an inline grid. The pop-up list of available queries is retrieved from a document system folder.'

Manage content

Status: (Working) Last updated on 4/14/2020 9:26:19 AM

Definition Properties Current tags Access settings

Title: Data Quick Entry Use dynamic page title

Publish file name: Data_Quick_Entry

Layout: (None)

Publish location: <http://lenovox1jo.csiinc.com>
Click appropriate button to generate a full URL

Create navigation on publish

Content gallery

- ContentTypes
 - Commerce
 - Communities
 - Contact
 - Content
 - Custom
 - Groups
 - Marketing
 - Offering
 - Utility**

Package Installer	member/Office and get their latest information from NRDS. Makes custom iParts deployable. Lets you select packages to be installed, view installed packages, and view failed installs.
Progress Tracker	Displays the progress towards a goal based on the results of an IQA query.
Query Chart Viewer	Displays query results in a chart, which can be set to a range of sizes, skins, and chart types.
Query Menu	Displays query results in an inline grid. The pop-up list of available queries is retrieved from a document system folder.
Query Profile Picture List	This iPart is deprecated. Use the Related Items iPart instead.

Or, enter a path to a web user control



Quick Data Entry Step 3: Add Content/Query

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

Configure iPart - Query Menu

*Name: New QueryMenuCommon

Title:

Do not render in design mode

iPart CSS class:

Display a border around this content

Display content within a collapsible panel

Show the content as collapsed

Display on screen sizes (for responsive themes only):

Limit users who can view data for other contacts

Open link in a pop-up

Show initial results for queries with optional filters

Enable export of query results

Enable email merge from query results

Map query results if address is available

Select list from data member name

Document Browser

\$.StaffTest/Alerts

DonorClubAlert_BLDG

RecordsMissingImportantData



Quick Data Entry Step 4: Add Website Navigation Item

The screenshot displays the 'Manage sitemaps' interface for a site named 'StaffTest'. The 'Access settings' tab is selected and highlighted with an orange box. An orange arrow points from this tab to a detailed view of the 'Access settings' configuration. In this view, the 'Security Set' is set to '(None)'. Under the 'Make this available to' section, the 'Specific Roles' table is shown with the following data:

Access Granted	Name	Permissions
<input type="checkbox"/>	OnBehalfOf	
<input checked="" type="checkbox"/>	Content Administrator	<input checked="" type="checkbox"/> Full Control <input checked="" type="checkbox"/> Read
<input type="checkbox"/>	CompanyAdministrator	
<input checked="" type="checkbox"/>	Program	<input checked="" type="checkbox"/> Full Control <input type="checkbox"/> Read
<input type="checkbox"/>	RemoteService	
<input checked="" type="checkbox"/>	SysAdmin	<input checked="" type="checkbox"/> Full Control <input checked="" type="checkbox"/> Read
<input type="checkbox"/>	Everyone	



Quick Data Entry: Update Email Addresses for Donors

The screenshot displays a web application interface for donor management. On the left is a dark sidebar with navigation options: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Continuum, and RiSE. The main area shows a list of donors with a search bar and a 'Find' button. An 'Edit' modal is open for the donor 'Ms. Janna Nariano'. The modal contains the following fields:

- First Name: Janna
- Middle Name: (empty)
- Last Name: Nariano
- Home Phone: (636) 555-1212
- Mobile Phone: 630-555-1212
- Email: (empty)
- Date of Birth: 4/4/1980

At the bottom of the modal are 'Save & Close' and 'Cancel' buttons. The background shows a table of donors with columns for 'Toll Free', 'Email', and 'Action'. The 'Action' column contains 'Edit' buttons for each donor.

Toll Free	Email	Action
630-555-1212		Edit
(800) 433-8900		Edit
		Edit
		Edit
610-555-1234		Edit
		Edit



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!**



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

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

How do we show each scenario?

CsAddress.StateProvince	Field	Data - in reality
CsAddress.Zip	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, 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.

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; Preview 3 of 777

To: Francis Pearson <fpearson@imisdemo.com>;

Subject: Take a moment to update your profile

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,



Blank Address Lines: Step 1: Build Query 1

ProfileUpdatesWithinLastYear

Define Run Report Group Security

Summary Sources Filters Display Sorting

Source	Type	
NetContact	Business Object	✕

Advanced options

- Use FORCE ORDER option
- Use NOLOCK locking hint
- Use join method for security enforcement

Query 1 defines members who have updated in past year

ProfileUpdatesWithinLastYear

Define Run Report Group Security

Summary Sources **Filters** Display Sorting

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



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)

PromptForProfileUpdate

Define Run Report Group Security

Summary Sources Filters Display Sorting

Add Source

Source	Type	
NetContact	Business Object	✕ ▲ ▼
ProfileUpdatesWithinLastYear	Query	✕ ▲ ▼
CsAddress	Business Object	✕ ▲ ▼

Relations

Description		
Custom (When NetContact.iMIS ID = NetContact1.iMIS ID Does Not Exist)	Not Exist	✕
FK_Name_Name_Address_Mail (When NetContact.Mail Address Num = CsAddress.Address Number)	Equals	✕



Blank Address Lines: Step 1: Build Query 2

PromptForProfileUpdate

Define

Run

Report

Group

Security

Summary

Sources

Filters

Display

Sorting

Add Filter

Refresh

Where	Property	Function	Comparison	Multiple	Value	Prompt	
	NetContact.Email	None	Not Empty				×

Query options

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



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
<input checked="" type="checkbox"/>	NetContact.Member Type	None			<input type="checkbox"/>	1	
<input checked="" type="checkbox"/>	NetContact.iMIS ID	None			<input type="checkbox"/>	2	
<input checked="" type="checkbox"/>	NetContact.Full Name	None			<input type="checkbox"/>	3	
<input checked="" type="checkbox"/>	CsAddress.Address 1	None			<input type="checkbox"/>	4	
<input checked="" type="checkbox"/>	CsAddress.City	None			<input type="checkbox"/>	5	
<input checked="" type="checkbox"/>	CsAddress.State Province	None			<input type="checkbox"/>	6	
<input checked="" type="checkbox"/>	CsAddress.Zip	None			<input type="checkbox"/>	7	
<input checked="" type="checkbox"/>	CsAddress.Country	None			<input type="checkbox"/>	8	
<input checked="" type="checkbox"/>	NetContact.Email	None			<input type="checkbox"/>	9	
<input checked="" type="checkbox"/>	NetContact.Home Phone	None			<input type="checkbox"/>	10	

SAVE NOW!

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



Blank Address Lines: Step 1: Build Query 2

<input type="checkbox"/>	NetContact.VAT Country	None ▾			<input type="checkbox"/>	13 ▾	
<input type="checkbox"/>	NetContact.VAT Exempt	None ▾			<input type="checkbox"/>	13 ▾	
<input type="checkbox"/>	NetContact.VAT Reg Number	None ▾			<input type="checkbox"/>	13 ▾	
<input type="checkbox"/>	NetContact.Website	None ▾			<input type="checkbox"/>	13 ▾	
<input type="checkbox"/>	NetContact.Work Phone	None ▾			<input type="checkbox"/>	13 ▾	

Custom		
SQL Expression	Alias	
CASE WHEN Len(vBoCs	Address2	+

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
<input checked="" type="checkbox"/>	NetContact.Member Type	None			<input type="checkbox"/>	1	
<input checked="" type="checkbox"/>	NetContact.iMIS ID	None			<input type="checkbox"/>	2	
<input checked="" type="checkbox"/>	NetContact.Full Name	None			<input type="checkbox"/>	3	
<input checked="" type="checkbox"/>	CsAddress.Address 1	None			<input type="checkbox"/>	4	
<input checked="" type="checkbox"/>	CASE WHEN Len(vBoCsAddress.Address2) > 0 THEN CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address2 ELSE " END	None	Address2		<input type="checkbox"/>	5	
<input checked="" type="checkbox"/>	CASE WHEN Len(vBoCsAddress.Address3) > 0 THEN CHAR(60) + 'BR/' + CHAR(62) + vBoCsAddress.Address3 ELSE " END	None	Address3		<input type="checkbox"/>	6	
<input checked="" type="checkbox"/>	CsAddress.City	None			<input type="checkbox"/>	7	
<input checked="" type="checkbox"/>	CsAddress.State Province	None			<input type="checkbox"/>	8	

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



Blank Address Lines: Step 2: Build Communication

MemberProfileUpdate - Compose communication

From info@alphaalphaalpha.org; 

To {#party.Email};

[Cc](#) [Bcc](#)

Subject Take a moment to update your profile

Type (None) ▾

[Choose Recipients](#) [Additional Data Sources](#)

 Normal Apply CSS ... Ω Insert field Insert link

Dear {#party.Name},

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.

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

Sincerely,

Sarah Smith
Alpha Chapter
Fraternity President

SAVE NOW!

Open Save As

Advanced email



Blank Address Lines: Step 2: Build Communication

The screenshot shows the iMIS interface for selecting recipients for a communication template. The title is "MemberProfileUpdate - Choose recipients". A query box contains the path "\$/.StaffTest/Alerts/PromptForProfileUpdate" with a "Select" button. Below the query is a table of member data. The table has columns for Member Type, iMIS ID, Full Name, Address 1, Address 2, Address 3, City, State/Province, Zip, Country, Email, and Home Phone. Four members are listed, all with their selection checkboxes checked. At the bottom right, a "Return to Compose" button is highlighted with an orange box.

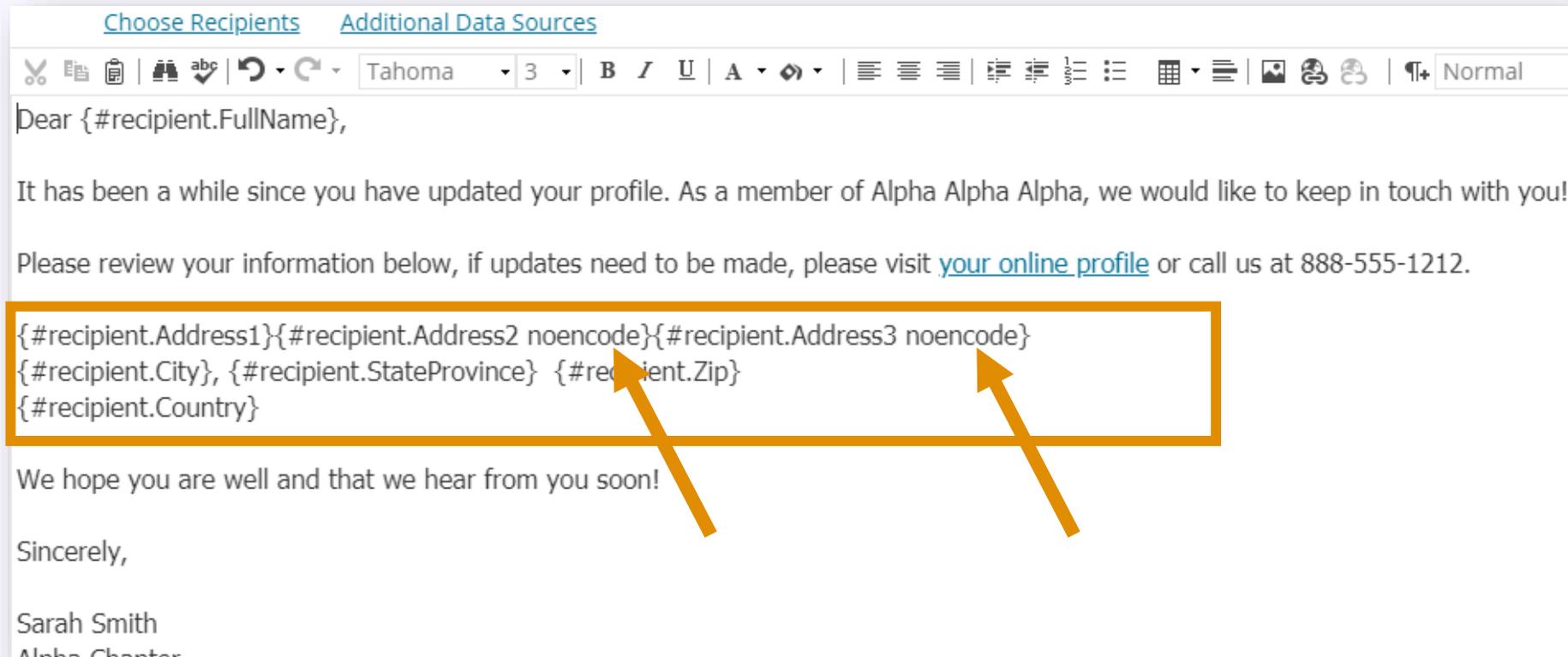
Member Type	iMIS ID	Full Name	Address 1	Address 2	Address 3	City	State Province	Zip	Country	Email	Home Phone
<input checked="" type="checkbox"/>	M	105	Ms. Carol A. Hamilton	P.O. Box 472665		Somerville	NJ	08876-1245		carolhamilton@imisdemo.com	(201) 786-5432
<input checked="" type="checkbox"/>	M	106	Jai Pandit	184 Allen St		Fayetteville	WV	25840-1404	United States	jpandit@imisdemo.com	
<input checked="" type="checkbox"/>	M	107	Ms. Paula D. Caller, CPA	1700 Atlantic Avenue		Dallas	TX	75201-4620	United States	paulacaller@imisdemo.com	(214) 749-9849
<input checked="" type="checkbox"/>	M	116	Mr. Phillip N. Davis, Jr.	1111 Old Pecan Street		Austin	TX	78888-1534		pdavis@imisdemo.com	(512) 555-8765

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



The screenshot shows an email editor interface. At the top, there are tabs for "Choose Recipients" and "Additional Data Sources". Below the tabs is a rich text editor toolbar with various icons and a font dropdown set to "Tahoma" with a size of "3". The main content area contains the following text:

Dear {#recipient.FullName},

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.

{#recipient.Address1}{#recipient.Address2 noencode}{#recipient.Address3 noencode}
{#recipient.City}, {#recipient.StateProvince} {#recipient.Zip}
{#recipient.Country}

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

Sincerely,

Sarah Smith
Alpha Chapter

Two orange arrows point from the "noencode" attribute in the address fields to the highlighted orange box.

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.

The image displays two side-by-side screenshots of a 'Communication Preview' window. Both windows show a preview of an email with the following details:

- From:** info@alphaalphaalpha.org;
- To:** Ms. Carol A. Hamilton <carolhamilton@imisdemo.com> (left) / Francis Pearson <fpearson@imisdemo.com> (right)
- Subject:** Take a moment to update your profile

The left screenshot shows the email body text:

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, p 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!

The right screenshot shows the email body text:

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,

Additional UI elements in the right screenshot include: 'Preview 3 of 777', 'Prev', 'Next', and 'Send All Now' buttons.



Questions? Contact me!



Jodi O'Toole
jotoole@csiinc.com
630-681-1100 x 107



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

