MANAGING & SETTING UP ACTIVITIES & UD FIELDS
ROBERT H. LANE, MBA, PH.D., CIP

YOUR PRESENTER

• Worked with iMIS since 1997
• Certified iMIS Professional
• Education - MBA (strategic management); Ph.D. (information systems)
• Dissertation on not-for-profit software
• CEO – Lane Services, LLC (AiSP since 2003)
• ASI Chairman’s Circle since 2010
• ASI Solution Provider of the Year in 2013
AGENDA - SOMETHING OLD & SOMETHING NEW

- Creating a user-defined table
- Using general lookup/validation tables (gen tables)
- Creating a user-defined window
- Creating a custom window
- Working with multi-instance tables
- Adding UD data to staff site
- Creating IQA Business Objects for UD tables
- Setting up activity types (record history)
CREATING A UD TABLE

- Have all users exit iMIS.
- Back up your data.
- Log into iMIS as MANAGER
- From Customers, select Set up module> General, and click Additional Windows to open the Customer Setup - Additional Windows window.
- Click Define Tables to open the User Defined Tables window.
- Click New.

CREATING A UD TABLE

- Enter a new Table Name. The table names are case-sensitive, so plan to use ALL CAPS or Initial Caps consistently. Table names must be unique
- Make sure any table or field you add does not match the name of any other iMIS table or field or any of the SQL Reserved Words. If you enter an iMIS table name, you are warned that the iMIS table may be overwritten.
- Press Tab. When iMIS prompts you to verify the table creation, click Yes.
CREATING A UD TABLE

- Accept the System and Access Method defaults.
- (optional) Enable the Multiple Instances Allowed option if you want customers to have more than one user-defined tab that will contain the same fields, for example, quarterly or annual surveys.
- If you enable the Multiple Instances Allowed option, the Always Create and Use for Dues Pricing options are grayed out. Enabling the Always Create and Use for Dues Pricing options grays out the Multiple Instances Allowed option.
- (optional) Enable the Always Create option if you want records to be created automatically for the appropriate customer types and are using the fields for Dues special pricing.
- Press Tab.

CREATING A UD TABLE

- (Optional) Enter specific customer types in the Only applies to these types field to restrict access to the demographic table, and separate customer types by commas. Leave the field blank to allow access to all customers. Press Tab.
- Enable the Use for Dues Pricing option if you are using the fields for Billing special pricing. Press Tab. iMIS displays a definition area for the first field for this table.
- Enter a valid SQL Field Name, and press Tab.
- (Multiple Instances Allowed only) If you are creating multiple instances of this table, we recommend making your first field contain the information that will distinguish the multiple instances from each other. For example, if you plan to have a table in each customer record for each year’s survey data, the first field name should be Year.
- Select a field format from the Type drop-down list. Press Tab.
CREATING A UD TABLE

- Enter # of characters/digits in length
- If the field is numeric, enter the # of decimals in the desc field
- In prompt, enter the text to display for this field
- In format, select as typed, upper case or upper/lower
- (Optional) In validation, enter the name of the gen table that contains the values to be selected
- (Optional) Check the multi-select box if you want users to select multiple values from the gen table

CREATING A UD TABLE

- Click Create/Update the server table and accept the prompt
- Click Auto-Create Window to automatically create a window containing all of the fields you created in the table
USING GEN TABLES

- General Lookup/Validation tables (gen tables) are used to contain lists of values users may select (see validation above)
- Go to Customers>Set up Tables>General Lookup/Validation
- To create a new table, click the drop down box & scroll until you see (New Table)
- When you select this, a box will open where you enter the name of the new gen table

SETTING UP GEN TABLES
USING GEN TABLES

• Do not use special characters other than underscore in the Codes or Expansion fields when creating general lookup/validation tables.
• The code field can hold up to 60 characters, but you should determine the maximum length of the field to which the code is connected. If you add a code that is longer, data will be truncated or may not appear.

USING GEN TABLES

• The value that is displayed in a drop down list or in a select window is determined in the following way:
  • If a Description is defined, the Description is displayed.
  • If no Description is defined, but an Expansion is defined, the Expansion is displayed.
  • If neither a Description nor an Expansion are defined, the Code is displayed.
USING GEN TABLES

- The value that is saved after a user selects a value from a drop down list or select window is determined as follows:
  - If the value in the general lookup/validation table has an Expansion value, the Expansion value is saved.
  - If the value in the general lookup/validation table does not have an Expansion value, the Code value is saved.
  - The Description value from the general lookup/validation table is never saved as the result of a selection from a drop down list.

USING GEN TABLES

- Expansion tables provide input replacement for specified fields. With this keystroke-saving technique, the user enters an abbreviation for a field, and the table look-up replaces it with the associated replacement text. This feature is useful for fields that commonly contain the same text. For example, the Prefix field can expand abbreviations in data entry according to the PREFIX table: entering m expands to Mr., entering p in the Title field expands to President, entering vp expands to Vice President.
USING GEN TABLES

- Some fields are set to use a table for both expansion and validation. *For example,* the PREFIX table provides abbreviated entries and restricts the text to one of the field values (or blank). When using combination tables, be sure to enter both the valid abbreviations and the full field values as codes so that both types of text entries will be accepted (validated).

USING GEN TABLES

- You should enter values for Expansion or Description that are different from the specified Code to prevent duplicate values from displaying in your drop-down lists. *For example,* if you enter Dr. as the Code and Dr as the Expansion, you will have a duplicate in your list.
CREATING A UD WINDOW

- Make sure all other users exit the iMIS system
- Using the iMIS Desktop, connect to iMIS with the MANAGER logon.
- From Customers, select Set up module > General, and click Additional Windows to open the Customer Setup - Additional Windows window.
- Click Define Windows to open the Window Designer window.
CREATING A UD WINDOW

- In the **Window Designer** window, name the user-defined tab, enter the table name that contains the data fields, and select the fields you want displayed on the tab.
- The field labels that display on the tab are the same as the data field names unless prompts are defined for the fields. The field labels display in parentheses.

CREATING A UD WINDOW

- Click **New**.
- Enter the tab name in the **Current windows** field.
- Press **Tab**. iMIS prompts you to confirm the creation of the new tab.
- Click **Yes**. iMIS prompts you for the table name.
- Enter the **Table Name** that contains the fields you want to use for the tab.
- Click **Save**. iMIS prompts you for the tab title.
- Click **Save** to accept the default title, or type in a different title.
CREATING A UD WINDOW

- Click **Save**. The **Window Designer** window displays the tab name and the **Available fields** from the selected table.
- Press **Tab**.
- (Optional) Enter any **Access keywords**, or select the **Find** icon to select keywords.
- (Required for single-instance tabs) Enter the **Number of Columns** you want to display for the tab.
- Select a data field from the **Available fields** list, and click **Add** to move the field to the **Current fields** list. Repeat this step for every data field to be displayed on your tab.

CREATING A CUSTOM WINDOW
CREATING A CUSTOM WINDOW

- Add fields from single-instance user-defined tables, the Name table, the Name_Fin table, or add SQL formula fields based on these tables.
- Specify the field prompt — the text that appears next to the field (optionally).
- Set individual field values to be read-only.
- Assign access keywords to limit which users have access to the tabs.

CREATING A CUSTOM WINDOW

- Organize fields into multiple tabs.
- Define your own layout and content for each tab; easy layout/definition process.
- Mark tab fields as “display only”.
- Provide different demographic subsets for different tabs (for example, for each department).
- Designate tab fields and data to display on customer profile reports.
- Provide for “tab level” security; access modes include full, view only, and none (see Limiting Access and/or Hiding Tabs).
CREATING A CUSTOM WINDOW

- Make sure all users exit iMIS before creating or modifying a tab.
- Make sure the field or tab does not have the same name as any table/field in iMIS or any SQL reserved word.
- Log on to the iMIS desktop as MANAGER.
- From Customers, select Set up module > General.
- In the Set up general options window, select Additional Windows.

CREATING A CUSTOM WINDOW

- In the Customer Setup - Additional Windows window, select Custom Tabs.
- Click <New custom tab> in the Custom tab name drop down list.
- If a custom tab already exists, click the Custom tab name drop down list, choose <New custom tab>, and then enter the name for the tab.
CREATING A CUSTOM WINDOW

• In the **Custom Tab Designer** window, specify the following options:
  – **Custom tab name** field — Enter the text to use as the tab label. You can use spaces and underscores (\_), but do not use punctuation (\',") special characters, or SQL reserved words.
  – **Number of columns** field - Enter the number of columns to use for displaying the fields.

CREATING A CUSTOM WINDOW

• Add fields to the custom tab:
  – **Fields from Tables** - For each field you want to add from an existing table, select the source table from the **Available tables** list, select the field name in the **Available fields** list, then click **Add**.
  – **Fields from SQL Formulas** - For each field you want to create from a SQL formula, select **Create SQL field**, specify a **Prompt** value and a valid SQL formula, then click **Add SQL**.
  – You can create SQL fields to display values calculated from values in any of the available tables. For example, the custom tab could display a contact's age (calculated from the birth date) or the tab could include extra information for a contact whose income is in a specified range.
**CREATING A CUSTOM WINDOW**

- To customize the prompt (text) that appears next to the active field (the field selected in the **Current fields** list), edit the text in the **Prompt** field. The **Current fields** list shows the **Prompt** setting for each field in parentheses after the field name.
- To make the active field appear at the beginning of a row, select the **New row** check box.
- To prevent users from editing the contents of the active field, select the **Read only** check box.
- To assign keyword access to the tab so that only authorized users have viewing or editing rights, use the **Access keywords** field. Set up access keywords just as you would for any user-defined window (as described in *iMIS Customer Management*).
- To reorder or remove fields, use the **Up**, **Down**, and **Remove** buttons.

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**CREATING A CUSTOM WINDOW**

- When you finish specifying tab settings, select **Save**, then **Close**. (Close the **Customer Setup Additional Windows** window also.)
- To set the new tab to appear at the next iMIS startup, right-click in the top of the **History** or **Detail** pane of the **Manage customers** window and select **Edit Tab Preferences**. In the **Customer Portfolio Tab Preferences** window, add the new tab to the **Visible Detail tabs** list. You can use the **Top**, **Up**, **Down**, and **Bottom** buttons to order the tabs. Select **Save**, then close the window.
- After you create the table or field, a message notifies you to restart iMIS for your changes to take effect.
- Restart iMIS and check for the custom tab you created.
### Working with Multi-Instance Tables

<table>
<thead>
<tr>
<th>Volunteer Type</th>
<th>Interests</th>
<th>Skills</th>
<th>Availability</th>
<th>Special Notes</th>
<th>Begin Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>Active</td>
<td>CON</td>
<td>M-F &amp; Holidays</td>
<td></td>
<td>1/1/2003</td>
<td>12/31/12</td>
</tr>
</tbody>
</table>

![Image of Volunteer Interface]

**Volunteer Interface**

- **Volunteer Type**: Phone
- **Interests**: Active
- **Skills**: CON
- **Availability**: M-F & Holidays
- **Special Notes**: Will be active again in near future
- **Begin Date**: 1/1/2003
- **End Date**: 12/31/2003
ON STAFF SITE JUST DRAG & DROP INTO PANEL

UD TABLE DATA ON STAFF SITE
CREATING IQA BUSINESS OBJECTS FOR UD TABLES

- Log in to staff site as MANAGER
- Go to Settings>Utilities>User Defined Tables
- Click Build All
- Results should say ‘successfully created’
- If you receive an error, click ‘Build All’ again
- **BE SURE** UD tables are NOT named Contact, Event, Orders, Gift or the name of any other current business object
UD BUSINESS OBJECTS MAY NOW BE USED

SETTING UP ACTIVITY TYPES (UNDER SETUP MODULE ON CP, MEMBERSHIP ON AAC)
<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
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<td>10</td>
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<tr>
<td>ACTIVITY_TYPE</td>
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<tr>
<td>TRANSACTION_DATE</td>
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<td>EFFECTIVE_DATE</td>
<td>datetime</td>
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<td>PRODUCT_CODE</td>
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<tr>
<td>OTHER_CODE</td>
<td>varchar</td>
<td>30</td>
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<tr>
<td>DESCRIPTION</td>
<td>varchar</td>
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<td>SOURCE_SYSTEM</td>
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<tr>
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<td>varchar</td>
<td>40</td>
</tr>
<tr>
<td>QUANTITY</td>
<td>numeric</td>
<td>NULL</td>
</tr>
<tr>
<td>AMOUNT</td>
<td>money</td>
<td>NULL</td>
</tr>
<tr>
<td>CATEGORY</td>
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<td>15</td>
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<tr>
<td>UNITS</td>
<td>numeric</td>
<td>NULL</td>
</tr>
<tr>
<td>THRU_DATE</td>
<td>datetime</td>
<td>NULL</td>
</tr>
<tr>
<td>MEMBER_TYPE</td>
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<tr>
<td>ACTION_CODES</td>
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<td>TICKLER_DATE</td>
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<td>NOTE_2</td>
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<tr>
<td>BATCH_NUM</td>
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<td>CO_ID</td>
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<tr>
<td>OBJECT</td>
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</tr>
<tr>
<td>INTENT_TO_EDIT</td>
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<tr>
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<td>UF_2</td>
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</tr>
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<td>ORIGINATING_TRANS_NUM</td>
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</tr>
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</table>
### ACTIVITY FIELDS

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Length</th>
<th>Nullable</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORG_CODE</td>
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<td>5</td>
<td></td>
</tr>
<tr>
<td>CAMPAIGN_CODE</td>
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<td>10</td>
<td></td>
</tr>
<tr>
<td>OTHER_ID</td>
<td>varchar</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>SOLICITOR_ID</td>
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<td></td>
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<tr>
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<td>NULL</td>
<td></td>
</tr>
<tr>
<td>ATTACH_SEQN</td>
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<td></td>
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<td>ATTACH_TOTAL</td>
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<td>RECURRING_REQUEST</td>
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<td>NULL</td>
<td></td>
</tr>
<tr>
<td>GRACE_PERIOD</td>
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<td>NULL</td>
<td></td>
</tr>
<tr>
<td>MEM_TRIB_CODE</td>
<td>varchar</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>TIME_STAMP</td>
<td>timestamp</td>
<td>NULL</td>
<td></td>
</tr>
</tbody>
</table>

### Set Up/ Edit Activity Type (If field isn't labeled it won't appear)
USE ON IMIS DESKTOP OR STAFF SITE

QUESTIONS?

Lane Services LLC
Robert H. Lane, Ph.D.
Principal/CEO
lanes@laneservices.com
215.846.0908
315.680.3735
www.laneservices.com
WITH THANKS TO OUR SPONSORS
NIUG DISCOVERY CONFERENCE

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>Sponsor Name</th>
</tr>
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<td>SURECOM</td>
</tr>
<tr>
<td>causeis</td>
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<td>millpost</td>
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</tr>
<tr>
<td></td>
<td></td>
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Wednesday 18 November 2015