



Experience the Next Chapter of DDI-Connect

2014 DDI User Group Meeting
April 22-23, 2014



Serving those who serve others





Agenda

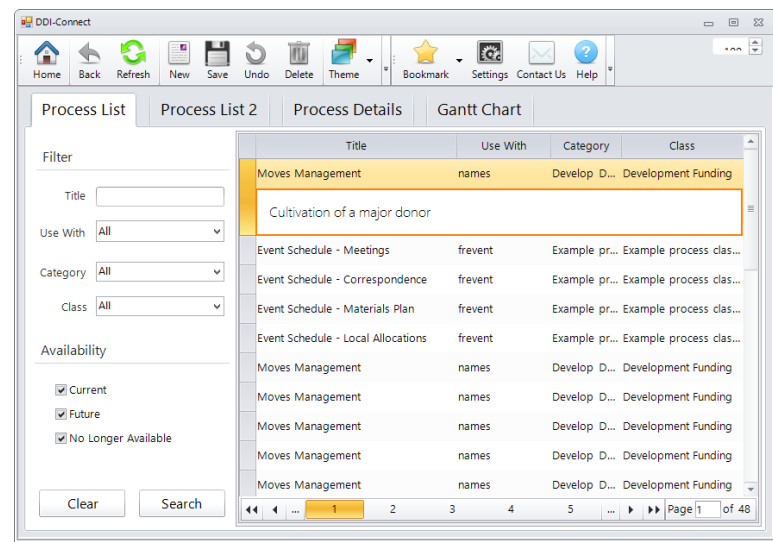
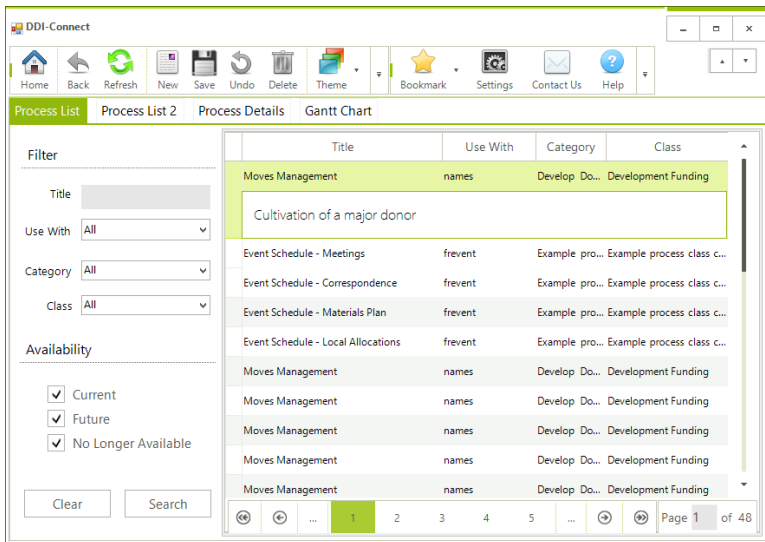
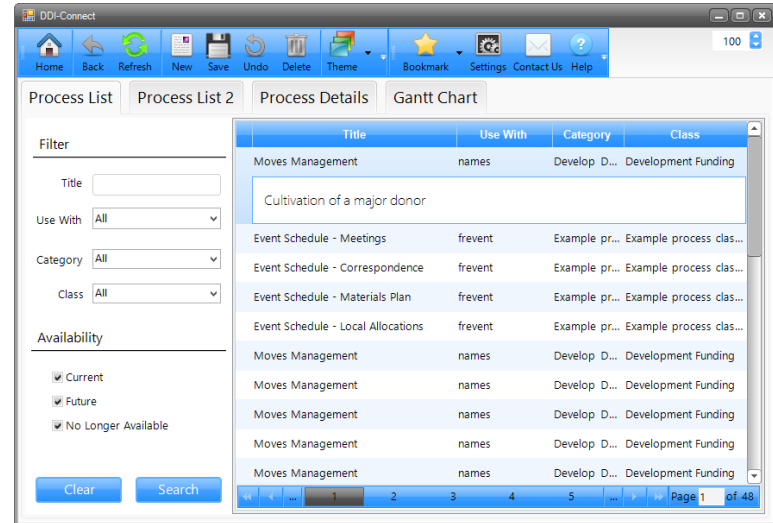
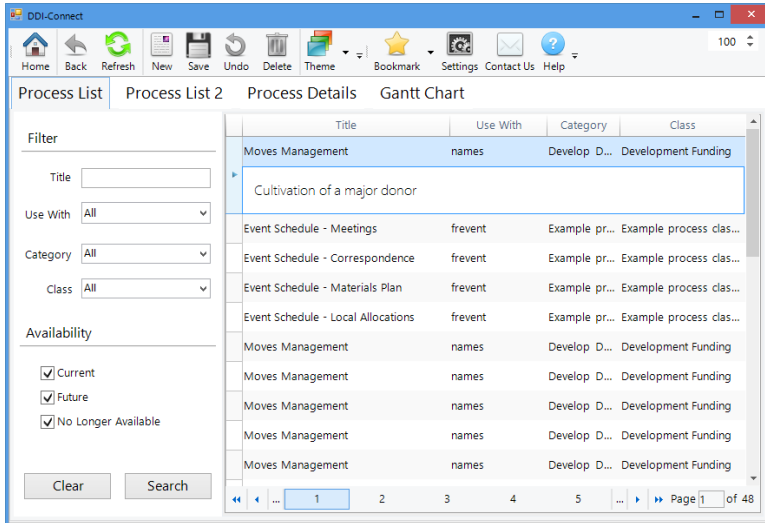
- ❑ General Application Items
 - Launching from One Menu
 - Settings
 - Start Up Screen
 - Bookmarks
 - Theme
 - Help
 - F1
 - Help Button
 - Contact Form
- ❑ View Additional Information in Grid
- ❑ Column Chooser
- ❑ Export Grid
- ❑ Double Click Actions
- ❑ Collapsible Sections
- ❑ Pivot Table

Personal Settings

The screenshot shows the DDI-Connect application window. The title bar reads "DDI-Connect". The menu bar includes Home, Back, Refresh, New, Save, Undo, Delete, Theme, Bookmark, Settings (highlighted with a red box), Contact Us, and Help. The main content area has tabs for Process List, Process List 2, Process Details, and Gantt Chart. The Process List tab is active, displaying a table of processes. On the left, there is a Filter section with input fields for Title, Use With (set to All), Category (set to All), and Class (set to All). Below the filter is an Availability section with checkboxes for Current, Future, and No Longer Available, all of which are checked. At the bottom, there are Clear and Search buttons, and a pagination bar showing "Page 1 of 48".

Title	Use With	Category	Class
Moves Management	names	Develop D...	Development Funding
Cultivation of a major donor			
Event Schedule - Meetings	frevent	Example pr...	Example process clas...
Event Schedule - Correspondence	frevent	Example pr...	Example process clas...
Event Schedule - Materials Plan	frevent	Example pr...	Example process clas...
Event Schedule - Local Allocations	frevent	Example pr...	Example process clas...
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding

Theme



Help

The screenshot shows the DDI-Connect application interface. The top menu bar includes Home, Back, Refresh, New, Save, Undo, Delete, Theme, Bookmark, Settings, Contact Us, and Help. The Help menu item is highlighted with a red box. Below the menu bar, there are tabs for Process List, Process List 2, Process Details, and Gantt Chart. A filter panel on the left allows filtering by Title, Use With, Category, and Class, with checkboxes for Current, Future, and No Longer Available. A HelpForm window is open, displaying the DDI logo and the title "Process Template Maintenance". The window includes a search bar, a "Log in" button, and a "Contents" section with a list of topics: 1 Overview of NA300UPD, 2 Adding a New Process Template (with sub-items 2.1 Process Setup tab and 2.1.1 Attaching Documents to a Process), 3 Copying an Existing Process Template, and 4 Editing an Existing Process Template. Below the contents is an "Overview of NA300UPD" section with a paragraph and two bullet points.

F1 Key does the same thing.

Contact Form

The screenshot shows the DDI-Connect application interface. At the top, a navigation bar includes icons for Home, Back, Refresh, New, Save, Undo, Delete, Theme, Bookmark, Settings, Contact Us (highlighted with a red box), and Help. Below this is a tabbed menu with 'Process List', 'Process List 2', 'Process Details', and 'Gantt Chart'. The main area displays a table with columns: Title, Use With, Category, and Class. The table lists several 'Moves Management' entries. A 'Contact Us' dialog box is overlaid on the right side of the table. The dialog has a blue header with the text 'Contact Us'. It contains the following fields: 'First Name' and 'Last Name' (with a placeholder 'Last'), 'Email', 'Subject', and 'Message' (with a placeholder 'Message for DDI'). At the bottom of the dialog are two buttons: 'Cancel' (red) and 'Submit' (green). On the left side of the application, there is a 'Filter' section with dropdown menus for 'Title', 'Use With' (set to 'All'), 'Category' (set to 'All'), and 'Class' (set to 'All'). Below the filter is an 'Availability' section with three checked checkboxes: 'Current', 'Future', and 'No Longer Available'. At the bottom of the filter section are 'Clear' and 'Search' buttons.

Grid - Additional Info

The screenshot shows the DDI-Connect application window. The top navigation bar includes icons for Home, Back, Refresh, New, Save, Undo, Delete, Theme, Bookmark, Settings, Contact Us, and Help. Below this is a tabbed interface with 'Process List' selected. On the left is a filter sidebar with sections for 'Filter' (Title, Use With, Category, Class) and 'Availability' (Current, Future, No Longer Available). The main area is a table with columns: Title, Use With, Category, and Class. A red arrow points to the second row of the table.

Title	Use With	Category	Class
Moves Management	names	Develop D...	Development Funding
Cultivation of a major donor			
Event Schedule - Meetings	frevent	Example pr...	Example process clas...
Event Schedule - Correspondence	frevent	Example pr...	Example process clas...
Event Schedule - Materials Plan	frevent	Example pr...	Example process clas...
Event Schedule - Local Allocations	frevent	Example pr...	Example process clas...
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding

Column Chooser

The screenshot shows the DDI-Connect application interface. The main window displays a table with columns: Title, Use With, Category, and Class. The table contains several rows of event schedule data. A 'Column Chooser' dialog box is open over the table, showing a grid of column headers: 'Use With', 'Category', and 'Class'. A blue instruction text is overlaid on the dialog: 'Drag a column header from the grid here to remove it from the current view.'

Table Data:

Title	Use With	Category	Class
Event Schedule - Meetings	frevent		
Event Schedule - Correspondence	frevent		
Event Schedule - Materials Plan	frevent		
Materials Plan			
Event Schedule - Local Allocations	frevent		
Event Schedule - Local Allocations	frevent		
Flag for Follow-Up: EVENTS	frevent		
Flag for Follow-Up: EVENTS	frevent		
Flag for Follow-Up: EVENTS	frevent		
Flag for Follow-Up: EVENTS	frevent		
Flag for Follow-Up: EVENTS	frevent		

Column Chooser Dialog:

Use With
Category
Class

Drag a column header from the grid here to remove it from the current view.

Export from Grid

The screenshot shows the DDI-Connect application window. The title bar reads "DDI-Connect". The navigation bar includes icons for Home, Back, Refresh, New, Save, Undo, Delete, Theme, Bookmark, Settings, Contact Us, and Help. The main area has four tabs: "Process List" (selected), "Process List 2", "Process Details", and "Gantt Chart".

On the left, there is a "Filter" section with input fields for "Title", "Use With" (set to "All"), "Category" (set to "All"), and "Class" (set to "All"). Below this is an "Availability" section with three checked checkboxes: "Current", "Future", and "No Longer Available". At the bottom left are "Clear" and "Search" buttons.

The main grid displays a table with the following columns: Title, Use With, Category, and Class. The data rows are as follows:

Title	Use With	Category	Class
Moves Management	names	Develop D...	Development Funding
Event Schedule - Meetings	frevent	Example pr...	Example process clas...
Event Schedule - Correspondence	frevent	Example pr...	Example process clas...
Event Schedule - Materials Plan	frevent	Example pr...	Example process clas...
Event Schedule - Local Allocations	frevent	Example pr...	Example process clas...
Moves Management	names	Develop D...	Development Funding
▶ Cultivation of a major donor			
Moves Management		op D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding
Moves Management	names	Develop D...	Development Funding

A context menu is open over the highlighted "Moves Management" row, showing two options: "Export to Spreadsheet" and "Export to PDF".

At the bottom of the grid, there is a pagination bar showing "Page 1 of 48" and navigation arrows.

Collapsible Sections

The screenshot illustrates the 'Collapsible Sections' feature in the DDI-Connect application. It shows two instances of the application window, demonstrating how sections can be expanded or collapsed.

Top Window (Collapsed): Shows a navigation menu with options like Home, Back, Refresh, New, Save, Undo, Delete, Theme, Bookmark, Settings, Contact Us, and Help. Below the menu are tabs for 'Process List', 'Process List 2', 'Process Details', and 'Gantt Chart'. The 'Process Details' tab is active, showing a table with 4 steps:

Step Num	Title
1	Email
2	Other
3	Personal visit
4	Telephone call

Bottom Window (Expanded): Shows the same navigation menu and tabs. The 'Process Details' tab is active, and the 'Moves Management' section is expanded. The form includes the following fields:

- Title: Moves Management
- Use With: [Dropdown]
- Description: Cultivation of a major donor
- Category: [Dropdown]
- Process Class: [Dropdown]
- Expected Result: Major donation
- Opportunity Amount: \$ [Text Box]
- Active From: Monday, March 31, 2014 to Monday, March 31, 2014
- Owner: [Dropdown]
- Attachments: [Paperclip icon]

At the bottom of the expanded window, a table shows the step details:

Step Num	Title	Category	Class	Action	Duration
1	Email	Example step...	Example step class	Email	0
2	Other	Example step...	Example step class	Other	0

Pivot Table

The screenshot displays the DDI-Connect application interface. The main window shows a Pivot Table with the following data:

		State				
Year	Quarter	IL	IN	MI	OH	WI
1969	Q1		111.78			
	1969 Total		111.78			
1970	Q1		101.16			
	1970 Total		101.16			
1986	Q1			1000.00		
	Q3	11523.12	20875.04		3000.00	
	Q4		1200.00		3000.00	
	1986 Total	11523.12	22075.04	1000.00	6000.00	
1987	Q1		90855.57	115718.03	22038.68	
	Q2		48300.29		14467.49	
	Q3	5000.00	32469.02			
	Q4	56997.62			11096.53	
1987 Total	61997.62	171624.88	115718.03	47602.70		
1988	Q1	7157.70	19946.99	82029.29	13965.08	
	Q2	46720.63	25031.02		21212.37	
	Q3	2500.00	43426.61		11088.76	

Q & A

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