

User Manual

wvFileUpload for iMIS

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wvFileUpload User Manual

Version 1.0

This manual is written for users to configure the wvFileUpload module of wvSuite.

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Updates may be made to this documentation and incorporated into later editions.

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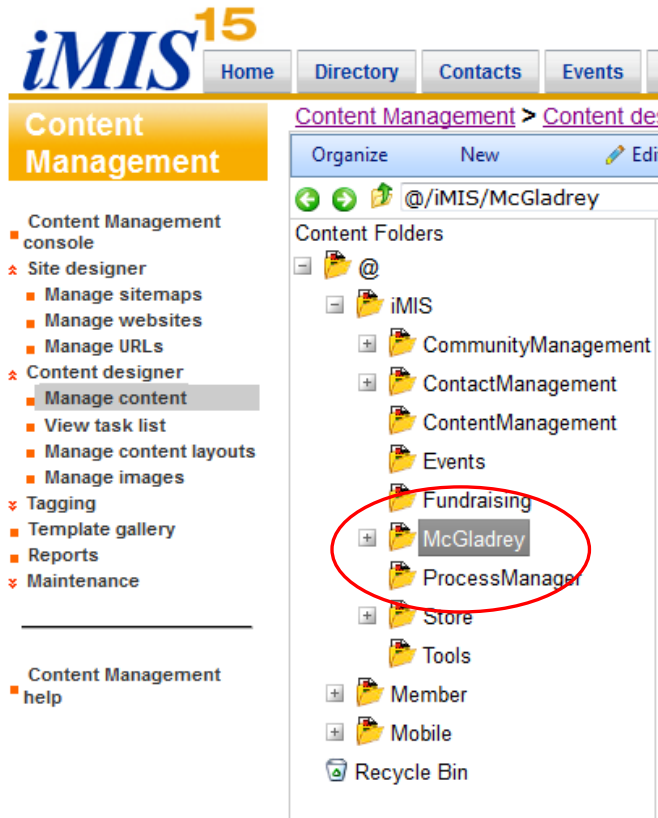


wvFileUpload

The following are steps to configure the File Upload iPart. You need to have completed the instructions in the installation manual prior to configuring.

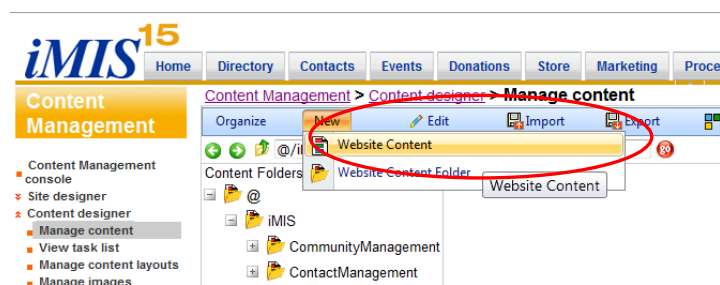
1. Create a place for the content

- Go to Content Management->ContentDesigner->Manage Content
- Create new folder called McGladrey under iMIS



2. Create new content for the selection page of uploads

- Choose New
- Choose Website Content



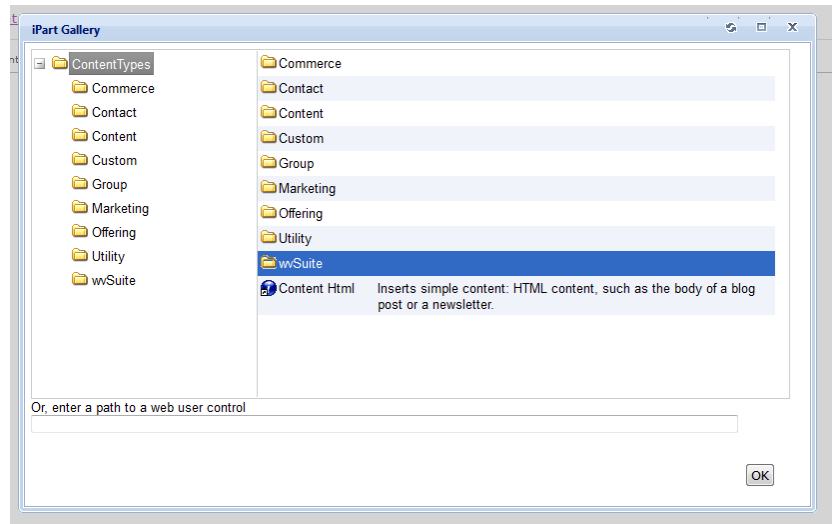
- c. Title the new content FileUploadChoose

The screenshot shows the 'Content Designer' window. At the top, it says 'Status: Working' with a red icon and 'Last updated on 5/21/2012 10:04:09 AM'. Below this are four tabs: 'Definition', 'Properties', 'Current Tags', and 'Access Settings'. The 'Definition' tab is active. It contains the following fields:

- Title:** FileUploadChoose
- Publish File Name:** FileUploadChoose
- Content Layout:** (None) with a dropdown arrow and a small icon.
- Publish Location:** <http://localhost>

At the bottom right, there is a blue link labeled 'add content'. Below the link, it says 'To add content, click the "add content" link above.'

- d. Click add content and select the wvSuite folder



- e. Choose the RSM.wvSelector in the wvSuite directory

3. Configure the RSM.wvSelector ipart

Configure IPart - RSM.wvSelector

*Name:

wvSelector configuration

This section

*Section title:

Instructions (HTML OK):

PageCode for this page (if child of another selector):

Lock with parent page (if child of another selector): ☐

Detail page

*Target URL for detail of found records:

*Child Page Type:

Creating new items

Allow "Create New" Button: ☒

Allow user to choose selector value on "Create New": ☒

Create New button tooltip:

IQA Query

*IQA Query: the query definition, you must return here, save and publish.

IQA Query settings.

#	Display Name	Display Type	Value
1	iMIS ID Equals	Auto Assign	Selected iMIS ID

Filtering by column

Navigation by Column

Values for fields:

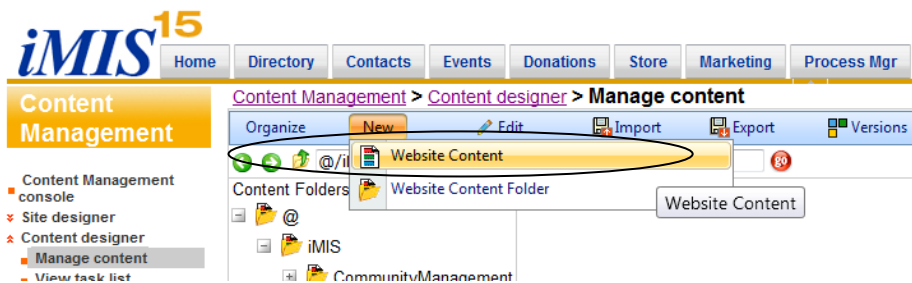
Name	Description	Value
Name	Unique Identifier of the part on the display page	FileUploadChoose
Section Title	Title on the page followed by selected name	Uploaded Files for
Instructions	Instructions are displayed below the title	Click one of the Uploaded Files below to View/Edit a file or press "Create New" to Upload a New File
PageCode for this page (if child of another selector):		(NONE)
Lock with parent page (if child of another selector):		Unselected
Target URL for detail of found records:	Page that will be navigated to on select or create new	~/iMIS/McGladrey/FileUploadDetails.aspx
Child Page Type:	Type of Child page	FileUpload
Allow "Create New" Button:	If a new item can be created in the target page.	Selected
Allow user to choose selector value on "Create New":	Allow the user to define the selector value on the new item	Selected



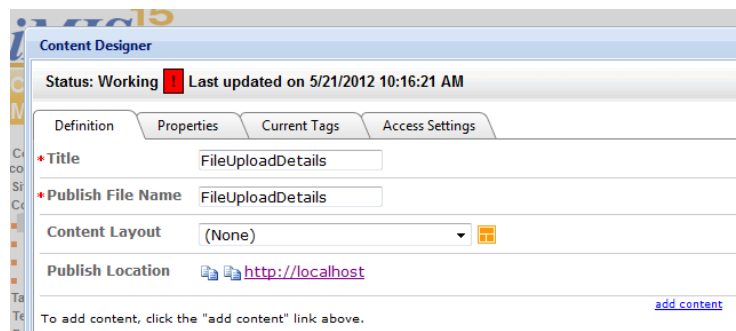
Create New button tooltip:	<i>Tooltip for create new button when hovering over it</i>	
IQA Query:	<i>Please select the IQA created in Step 3</i>	Click Select -> Select FileUploadSelector (sample one is provided)
IQA Query settings	<i>These are the filters for the query. When using iMIS ID, uses Selected ID</i>	
Display Type		select Auto Assign
Value		Selected iMIS ID

4. Create the File Upload Detail page

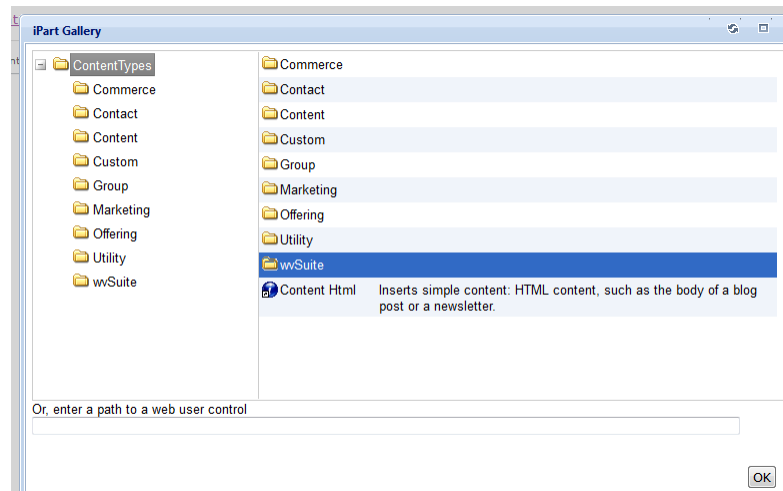
- a. Choose New
- b. Choose Website Content



- c. Title the new content FileUploadDetails



- d. Click add content and select the wvSuite folder



- e. Choose the RSM.wvFileUpload in the wvSuite directory

5. Configure RSM.wvFileUpload

Configure iPart - RSM.wvFileUpload

*Name

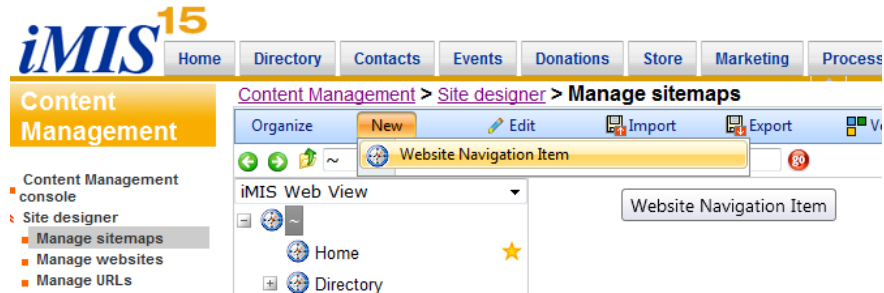
*URL to Return To:

PageCode of the parent page:

Field	Value
Name	FileUploadDetail
URL to Return To:	~/iMIS/McGladrey/FileUploadChoose.aspx
PageCode of the parent	(None)

6. Add a navigation item to display the File Upload selection information.

- a. Go to Site Designer-> Manage sitemaps
- b. Create the new website navigation item



Manage sitemaps

Status: Working

Properties | Workflow Management | Options | Access Settings

Navigation Link Text: Upload Documents

Navigation Folder Name: wvFileUpload

Tool Tip Description:

Content or URL to Link to: @/iMIS/McGladrey/McGladrey/select

Or select a standard page: (None)

URL Parameters:

Breadcrumb Name: Upload Documents

Hide on this page: ☐

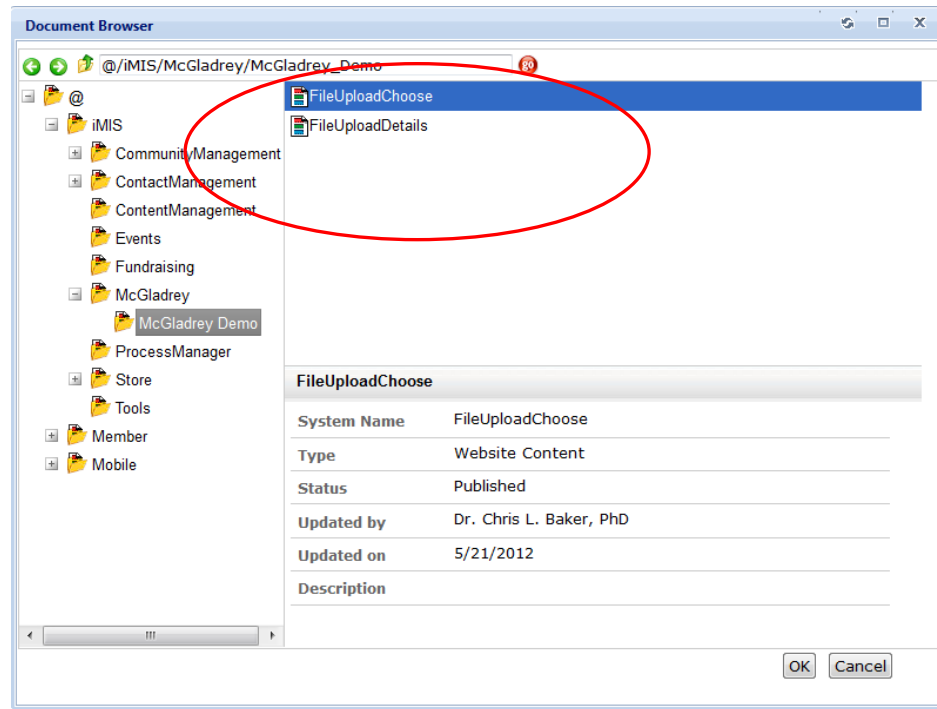
Override Content Title:

Navigation Code:

Navigation Attributes:

Folder containing template gallery content: ☒ Inherit from parent

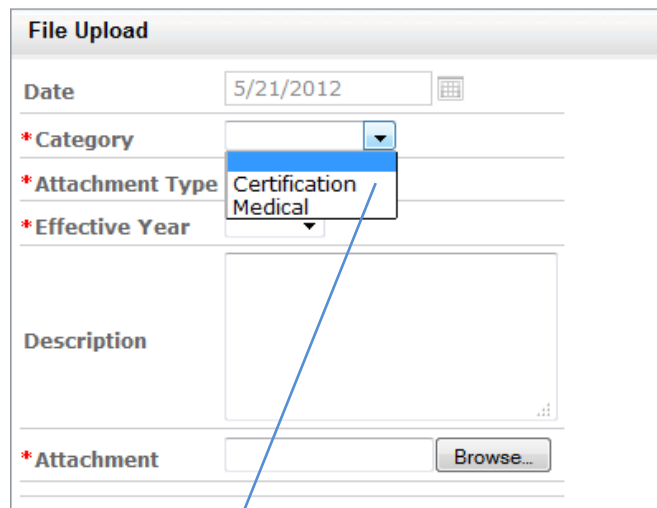
- c. For Content or URL to Link to: Select -> FileUploadChoose



- d. Move the content page to your chosen location by dragging and dropping to preferred location in left navigation area.
- e. Publish the page.

7. Update the preconfigured dropdowns

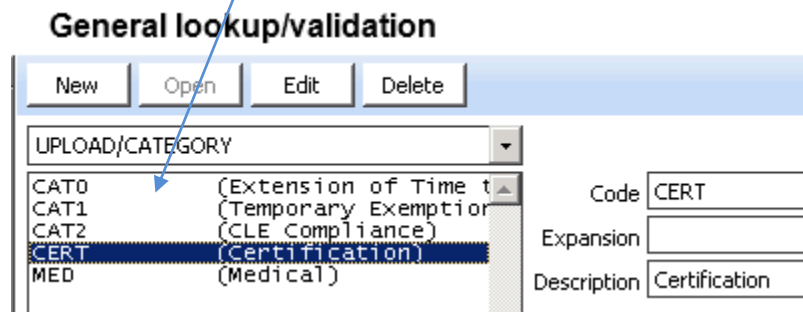
a. Category Dropdown:



The screenshot shows a 'File Upload' form with the following fields:

- Date:** 5/21/2012
- *Category:** A dropdown menu is open, showing 'Certification' and 'Medical' as options.
- *Attachment Type:** A dropdown menu.
- *Effective Year:** A dropdown menu.
- Description:** A text area.
- *Attachment:** A text field with a 'Browse...' button.

In the iMIS database table **Gen_Table**, add the following rows based on your requirements for the category dropdown. Create a new row for each item required.



The screenshot shows a 'General lookup/validation' window with the following components:

- Buttons:** New, Open, Edit, Delete.
- Dropdown:** UPLOAD/CATEGORY.
- Table:**

Code	Expansion	Description
CAT0	(Extension of Time t	
CAT1	(Temporary Exemption	
CAT2	(CLE Compliance)	
CERT	(Certification)	
MED	(Medical)	

The 'CERT' row is highlighted. To the right of the table, there are input fields for 'Code', 'Expansion', and 'Description'.

- b. Attachment Types Dropdown:
Attachment types are derived from the selected Category

The image shows two side-by-side screenshots of a 'File Upload' form. Both forms have a 'Date' field set to '5/21/2012'. The left form has the '* Category' dropdown set to 'Certification', and its '* Attachment Type' dropdown shows options: 'Certificate', 'Notes', and 'Other'. The right form has the '* Category' dropdown set to 'Medical', and its '* Attachment Type' dropdown shows options: 'Notes', 'Other', and 'Records'. In both cases, the dropdown menu is open, and the options are circled in red.

General lookup/validation

The image shows a 'General lookup/validation' window. It has a toolbar with 'New', 'Open', 'Edit', and 'Delete' buttons. Below the toolbar is a list box titled 'UPLOAD/ATTACHMENTTYPE' containing the following items:

Code	Description
CERT.CERT	(Certification)
CERT.NOTES	(Notes)
CERT.OTHER	(Other)
MED.NOTES	(Notes)
MED.OTHER	(Other)
MED.RECORDS	(Records)

To the right of the list box are three input fields: 'Code' (containing 'CERT.CERT'), 'Expansion' (empty), and 'Description' (containing 'Certification').

**The dropdown menu for attachment type will be derived based on the subheading for the code.
For example all attachment types with subheading CERT.XXX in the CODE field will be displayed when the Category Certification is selected in the Category dropdown.

8. System Setup:

These settings can be found under System Setup->RSM Configuration

Comma-separated list of file extensions to be rejected by the FileUpload component.

.aspx,.ascx,.asmx,.ashx,.asp,.axd,.cer,.d

Upload path for wvFileUpload iPart

C:\Program Files (x86)\AS\IMS15\Net\Download\

Upload virtual path for wvFileUpload iPart

~/Download/