

Installation Manual

wvSuite for iMIS

By:



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wvSuite Installation Guide

Version 2.0

This manual is written for technical staff who will be performing the install of wvSuite.

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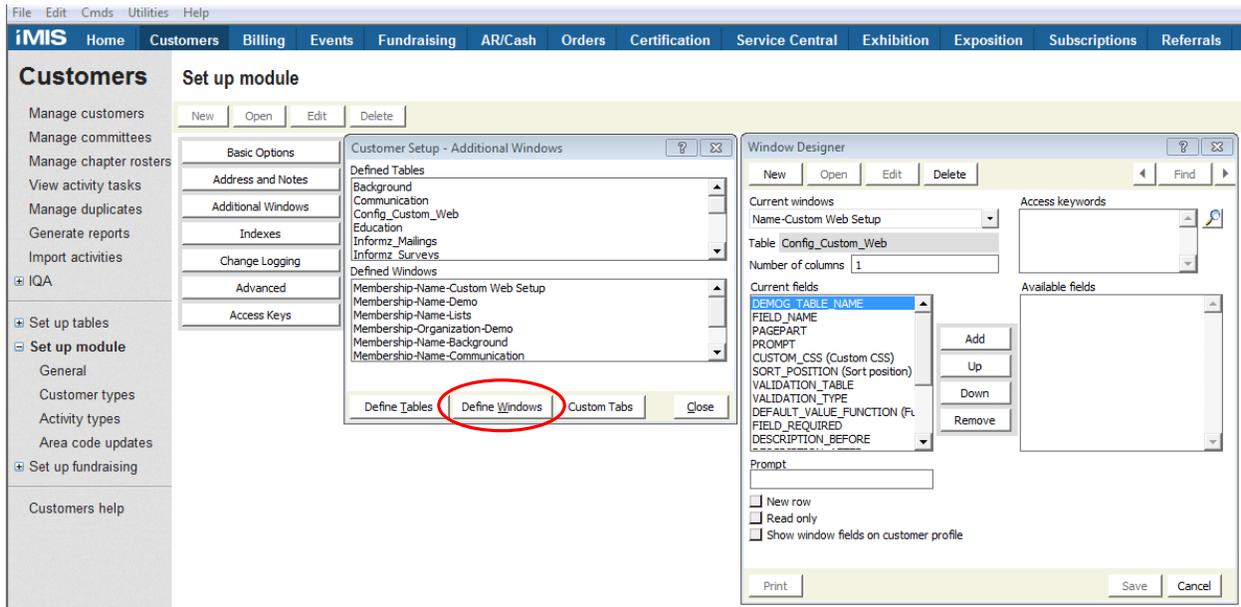
Installing wvSuite

1. If you are installing a new version of the iParts because of an iMIS upgrade, complete the upgrade first and make sure iMIS is running.
 - o If the existing iParts cause any problems with the upgrade, you can delete McGladrey.Library.dll and wvSuite.dll from Net\bin
2. Copy wvSuite.[version].ipackage to C:\Program Files (x86)\ASI\[yourimis]\Net\package\pending
 - o If you have never used Package Installer before, this folder may not exist. Opening Package Installer one time will create it, or you can create the folders manually.
3. (20.1.12 and previous) Stop the AsiPublishing service
4. Log into the staff site as manager, and go to Settings > Utilities > Package Installer (this path may differ depending on the version of iMIS)
5. Click Install.
 - o On iMIS 20.1.12 and earlier versions, you will receive a File Permissions error if you missed step 3.
 - o If the installation fails for other reasons, please report any errors to chadd.arthur@rsmus.com for support.
 - o You can retry a failed installation by moving the ipackage file from package\failed to package\pending.
6. (20.1.12 and previous) Start the AsiPublishing service
7. (20.1.13 and later) Copy McGladrey.Library.dll and wvSuite.dll from ...\\Net\bin to \\AsiPlatform\asiScheduler_[instance]\bin and restart AsiScheduler by visiting its startup URL.
8. Wait for iMIS to warm up again.
9. Log into iMIS desktop as MANAGER or another system administrator to create required User Defined (UD) tables.
 - a. Customers > Set up module > Additional Windows
 - b. Define Tables
 - i. Select Config_Custom_Web
 - ii. Click on the “as Typed” on the first field
 - iii. Save

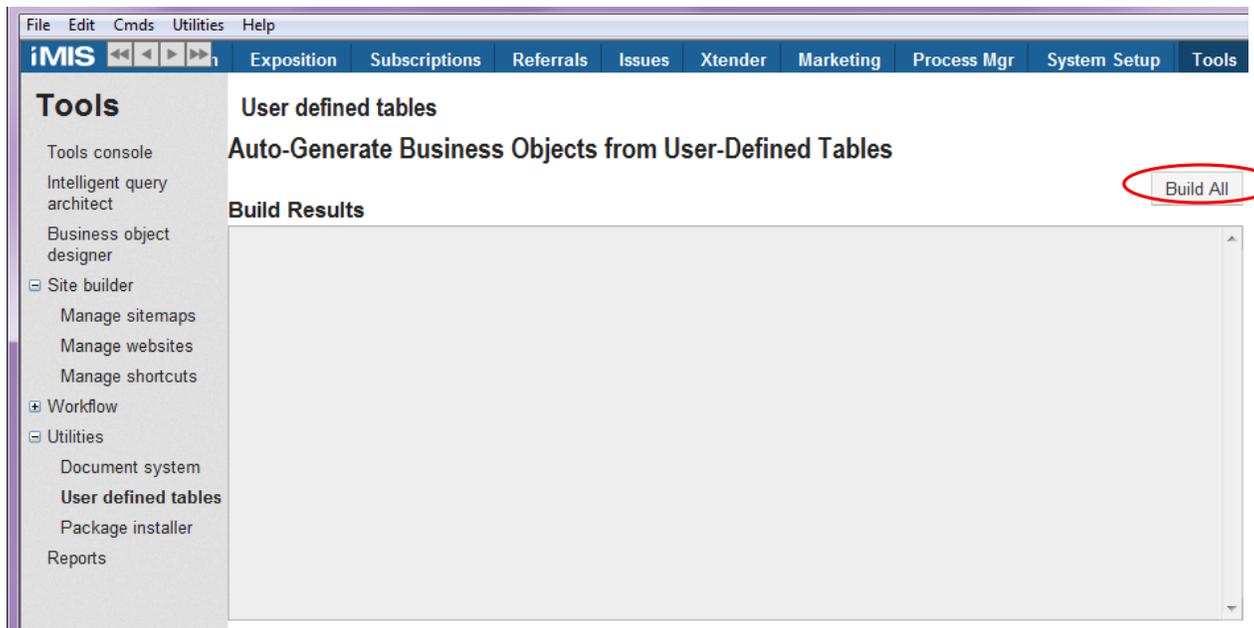
The screenshot displays the iMIS software interface. The main window is titled 'Set up module' and contains a list of options under 'Additional Windows'. The 'Additional Windows' option is highlighted with a red circle. Below it, the 'Define Tables' option is also highlighted with a red circle. A 'User Defined Tables' dialog box is open, showing a table configuration for 'Config_Custom_Web'. The 'Format' dropdown is set to 'as typed', which is also highlighted with a red circle. The dialog shows three fields: 'DEMOG_TABLE_NAME', 'FIELD_NAME', and 'FIELD_REQUIRED', each with its own configuration options for type, length, and validation.



- c. Define Windows
 - i. Select the window called Name-Config_Custom_Web
 - ii. Select a field, click up, click down
 - iii. Save



- d. Rebuild Business Objects for UD tables.
 - i. In desktop: go to Tools > Utilities> User defined tables.
 - ii. For versions that no longer have this capability in desktop. Go to Staff Site > Log in as Manager > Settings > Utilities > User defined tables
 - iii. Build All



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10. Log into the Staff Site. Go to RiSE > Site Builder > Manage Sitemaps. Publish the sitemap for each of these sites (ignore any that don't exist in your version of iMIS):
 - Administrative Console
 - Advance Accounting Console
 - iMIS Desktop View
 - iMIS Web View
 - Staff
11. Go to RiSE > Business object designer. Publish the business objects named WvActivityTypes and WvRelationshipTypes created by the install.
12. Go to RiSE > RSM Configuration, add any license keys and review the other settings. Most settings do not need adjustment, especially during an upgrade.
13. On an upgrade, you may need to edit and republish your iPart pages to incorporate new settings. Go to RiSE > Page Builder > Manage Content, and then for each page with a McGladrey iPart:
 - Click the Configure option on the first iPart.
 - Review the configuration for new settings.
 - Whether you made changes or not, click Save. (New options will be populated with appropriate defaults.)
 - Repeat for each additional iPart.
 - Finally, save the content page.
 - You can publish each page as you complete it or all at once.
14. To install examples, log into *iMIS* staff site as MANAGER or another content administrator; go to RiSE > Page Builder > Manage Content > Content Types. Import the wvSuite_Examples.xml file from the Install folder

