

User Manual

wvMultiInstance for iMIS

By:



191 N. Wacker Dr. #1400
Chicago, IL 60606
mcgladrey.com/iMIS

wvMultiInstance **User Manual**

Version 1.0

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

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McGladrey LLP
191 N. Wacker Drive Suite 1400
Chicago, IL 6060



wvMultilInstance - Configuration

The following are steps to configure the wvMultilInstance iPart. Installation of wvSuite is required before proceeding. If the installation of wvSuite has not yet been performed, instructions for the installation are found in the wvSuite Installation manual.

This manual will walk through the setup of a CEU MultilInstance example.

1. **Create the Required Tables in the iMIS Database using the standard iMIS Customizer.**
(See the Customer reference manual from ASI for instructions on how to do this.)
**Each table requires SELECTOR_SINGLE(Char 50) and SELECTOR_PARENT(Char 50)*

dbo.JDT_CEU_Header	
Columns	
ID (PK, varchar(10), not null)	
SEQN (PK, int, not null)	
SELECTOR_SINGLE (varchar(50), not null)	
SELECTOR_PARENT (varchar(50), not null)	
TOTAL_CEU_HOURS (float, not null)	
TIME_STAMP (timestamp, null)	

dbo.Name_CEU	
Columns	
ID (PK, varchar(10), not null)	
SEQN (PK, int, not null)	
SELECTOR_MULTI (varchar(50), not null)	
SELECTOR_PARENT (varchar(50), not null)	
Date_reported (datetime, null)	
CEU_type (varchar(30), not null)	
CEU_event (varchar(30), not null)	
CEU_Course (varchar(30), not null)	
CEU_notes (varchar(30), not null)	
CEU_followup (varchar(30), not null)	
CEU_source (varchar(30), not null)	
CEU_Hours (float, not null)	
TIME_STAMP (timestamp, null)	

2. **Add the configuration fields required by the wvSuite program to create the MultilInstance objects.**

The following tables are used by the wvSuite MultilInstance module. These are all located in the General Lookup/Validation tables.

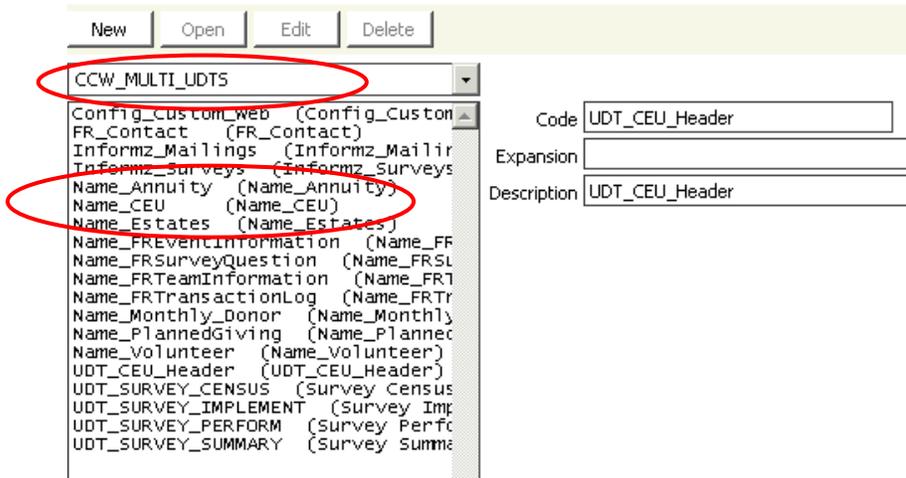
CCW_MULTI_UDTS	▼
CCW_PAGEPART	▲
CCW_PAGEPRIMARYTABLE	
CCW_ROLES_REQUIRED	
CCW_SUBMISSION_STATUS_ACCESS	
CCW_VALIDATION_TYPE	▼



- a. Add all User Defined Tables (UDT) which will be used in the Multinstance field display to CCW_MULTI_UDTS.

Upon installation, the UDTs that already exist will be loaded. As new tables are created, they will need to be loaded before they can be used on the website. The CCW_MULTI_UDTS table is found in the General lookup/validation tables.

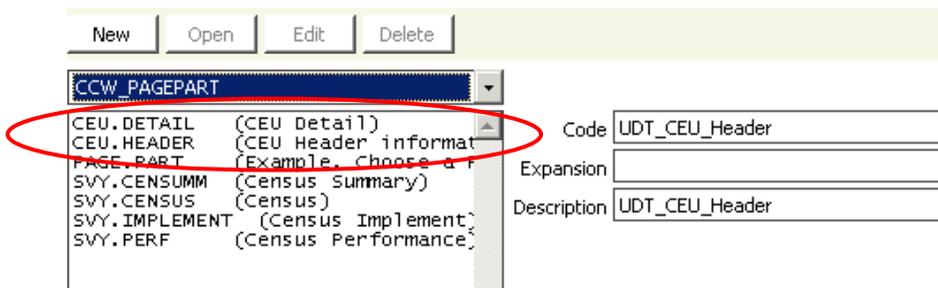
General lookup/validation



- b. Add pageparts to the CCW_PAGEPART.

Each panel that contains fields from a Multinstance table requires a unique identifier called a pagepart. The pagepart is a code. The code is listed in the General Lookup/Validation tables, in a table called CCW_PAGEPART. Add all iPart panels found on the webpages to CCW_PAGEPART.

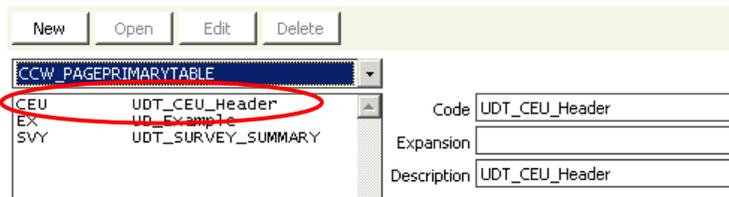
General lookup/validation



c. Define the primary table in the CCW_PAGEPRIMARYTABLE.

Panels can be grouped together, even if the fields are from different MultInstance tables. In order for the grouping to occur, one table must be identified as the primary table. The primary table contains a single row to identify all the other data from the other tables. This table contains the SELECTOR_SINGLE field in the table.

General lookup/validation



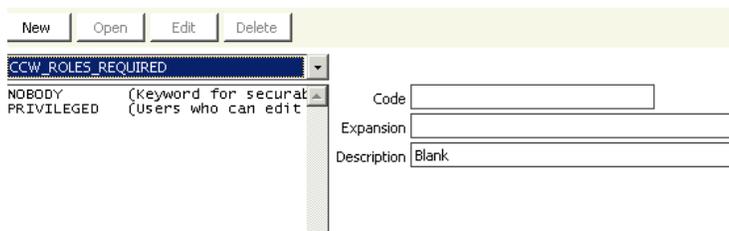
d. Add any additional CCW_ROLES_REQUIRED.

This table holds a list of the Roles that are to be used to secure each field. Used as the lookup table for the Role(s) required for edit and Role(s) required for view fields in the Custom Web Setup tab.

Version 1.0.6710 and later use Roles to control access so the lookup should contain the names of valid Roles. Versions before 1.0.6710 compared these to a user's Access Keywords.

The value NOBODY has a special meaning. It is used to prevent all users from accessing a field. No user should ever be a member of the NOBODY role.

General lookup/validation



e. Modify/add values to CCW_SUBMISSION_STATUS_ACCESS.

wvMultInstance has a feature to assist in workflow processes. The information on the page that contains a Submission Status field can be viewed, edited or locked, depending on the stage of the workflow.

This table holds a list of all status levels available as part of a workflow process. These status codes are used for SUBMISSION_STATUS fields.

General lookup/validation

New		Open		Edit		Delete	
CCW_SUBMISSION_STATUS_ACCESS							
10	PENDING	Edit	(Edit)	Code			
20	READY	View	(Edit)	Expansion			
90	CLOSED	View	(View)	Description Blank			

f. Modify/add values to CCW_VALIDATION_TYPE.

This table is a standard list of the types of validation which can be used on a wvSuite field. This table is used as the lookup table for the Validation_Type field in the Custom Web Setup tab.

(Making changes to this table will not provide any additional services but could remove access to some of the standard features. We recommend you do not change this list).

General lookup/validation

New		Open		Edit		Delete	
CCW_VALIDATION_TYPE							
			(Blank)	Code			
FIND_ID			(Find ID)	Expansion			
GENTABLE			(General Lookup Tabl	Description Blank			
SQLFUNCTION			(calculated (SQL))				

3. Create a Configuration record.

Create an *iMIS* record that will house the configuration fields for the pageparts. The record will need to have the member type of “_CFG”. Update the RSM Configuration area with the ID of this record.

System Setup

System Setup > RSM McGladrey Configuration

- iMIS Management
 - Set up printers
 - Security administration
 - Workflow monitor
 - Task viewer
 - ▼ Tools Demo

■ Module setup

- Set up web components
 - Set up customer web components
 - Set up events web components
 - Set up commerce web components
 - Set up content management

- System setup help
 - RSM configuration

Activity types which should never be displayed in ActivityEditor even when keywords permit.
(RSM.wvActivity.TypesBlacklist)
CALL,UPLOAD

License key for wvFileUpload iPart
(RSM.wvFileUpload.License)

Comma-separated list of file extensions to be rejected by the FileUpload component.
(RSM.wvFileUpload.ExtensionBlacklist)
.aspx,.ascx,.asmx,.ashx

Upload path for wvFileUpload iPart
(RSM.wvFileUpload.UploadPath)
C:\Program Files (x86)\

Upload virtual path for wvFileUpload iPart
(RSM.wvFileUpload.UploadVirtualPath)
~/Download/

License key for wvMultiInstance iParts
(RSM.wvMultiInstance.LicenseKey)

ID of the contact record which owns the Custom Web Configuration settings
(RSM.wvMultiInstance.ConfigurationOwner)
18019

4. Add database fields that are to show on the panel.

In order for fields to show on a panel, the pagepart has to be paired with the fields that are to show within that panel. The Custom Web Setup window is location in *iMIS* to configure the fields for each pagepart.

Overview	Picture	Communications	Informz_Mailings	Status	Financial	CEUs	Profile	Custom Web Setup			
DEMOG_TA	FIELD_NAME	PAGEPART	PROMPT	Custom CSS	Sort position	VALIDATION	VALIDATION	Function for	FIELD_REQ	DESCRIPTION	DESCR
UDT_SURVE	EMPLOYEE_SVY	CENSUS	Total		1	fr_CCWCal	SQLFUNCTI		False		
UDT_SURVE	EMPLOYEE_SVY	CENSUS	Total		2	fr_CCWCal	SQLFUNCTI		False		
UDT_SURVE	EMPLOYEE_SVY	CENSUS	Total		3	fr_CCWCal	SQLFUNCTI		False		
UDT_SURVE	EMPLOYEE_SVY	CENSUS	Total		4	fr_CCWCal	SQLFUNCTI		False		
UDT_SURVE	EMPLOYEE_SVY	CENSUS	Total		5	fr_CCWCal	SQLFUNCTI		False		
UDT_SURVE	EMPLOYEE_SVY	CENSUS	Total		6	fr_CCWCal	SQLFUNCTI		False		
UDT_SURVE	CR_CARPEN	SVY.CENSUS	Carpenters		1				False	 I	
UDT_SURVE	CR_LABORE	SVY.CENSUS	Laborers		2				False		
UDT_SURVE	CR_CMTMA	SVY.CENSUS	Cement		3				False		
UDT_SURVE	CR_BRICKL	SVY.CENSUS	Bricklayer		4				False		
UDT_SURVE	CR_OPERAT	SVY.CENSUS	Operating		5				False		
UDT_SURVE	CR_PLUMBE	SVY.CENSUS	Plumbers		6				False		
UDT_SURVE	CR_SHEETM	SVY.CENSUS	Sheet Metal		7				False		
UDT_SURVE	CR_ROOFER	SVY.CENSUS	Roofers		8				False		
UDT_SURVE	CR_PAINTI	SVY.CENSUS	Painters		9				False		

- Find the _CFG member type record. This is the record which contains the information for the fields that are to appear on the pagepart.
- Click on the Custom Web Setup tab.
- Double click on an empty row in the grid to open a new entry.

- d. Complete the field configuration. When completed, click OK on this window AND click Save on the _CFG record.

Field Name	Description	Value (The values listed here are for this example – you will choose the table that is the correct one for your configuration)
DEMOG_TABLE_NAME	Name of the MultiInstance table where the field is located.	Name_CEU
FIELD_NAME	The exact SQL name of the field. If this is typed incorrectly, the field will not appear on the pagepart.	DATE_REPORTED
PAGEPART	This is the unique identifier for the panel in which the field will show. All fields in the same panel should have the same pagepart.	CEU_Detail
PROMPT	This is the label that will appear on the webpage to inform the user on what should be entered in the field. The prompt can be up to 255 characters in length.	Date Reporting



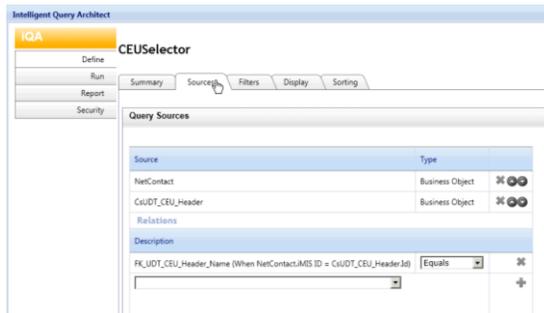
Custom CSS	This is custom CSS coding that can be used for this field and not affect other fields	
Sort Position	This provides the order on the panel in which the field will appear. This is a numeric field, with the lower numbers appearing first on the panel.	10
Validation table	This is the name of the general lookup table, name of the SQL function or the path where the queries are located for Find ID validation types.	
Validation type	Each field can have a drop down list available (General Lookup Tables), can be a field that is not editable but displays a value from a SQL function (Calculated (SQL)), or allows an ID from within <i>MIS</i> to be located and captured on a user defined table (Find ID).	
Function for default table	A SQL function can be written that returns a value during the initial entry of data. The field can be overwritten, but will default to the value determined in this feature.	
FIELD_REQUIRED	When checked, this will make the field a required one on data entry. The field's prompt will include a red asterisk to indicate that it is required. If no data is entered on this field, an error will be displayed when the data is submitted and will not be saved.	
DESCRIPTION_BEFORE	Text entered in this area will display on the screen above the prompt and field. It has special formatting, but HTML can be incorporated into the text entered here to further define the formatting.	
DESCRIPTION_AFTER	Text entered in this area will display on the screen below/after the prompt and field. It has special formatting, but HTML can be incorporated into the text entered here to further define the formatting.	
TOOLTIP	Text entered in this area will display to provide the user further assistance regarding the field. An information icon appears next to the field. Placing the cursor over the icon displays the instructions from this area.	
Roles required for edit	This area holds a list of the Roles that are to be used to secure each field when editing. ¹ A user can edit the field if they have any Role listed here, and also have the necessary View roles.	
Roles required to edit new	This area holds a list of the Roles that are to be used to secure each field when the page is first created. ¹ A user can edit the field if they have any Role listed here, and also have the necessary View roles.	
Roles required for view	This area holds a list of the Roles that are to be used to secure each field for viewing. ¹ A user can view the field if they have any Role listed here.	
Roles required to view new	This area holds a list of the Roles that are to be used to secure each field when the page is first created. ¹ A user can view the field if they have any Role listed here.	
Show on Grid	This is for Grid panels only. When checked, the field will show on the initial display of the grid. If it is not checked, then the field will only appear on Insert or Update of the row.	

¹ In version 1.0.6710 and later, this setting compares to a user's Roles. In versions prior to 1.0.6710, it compared against a user's Access Keywords.



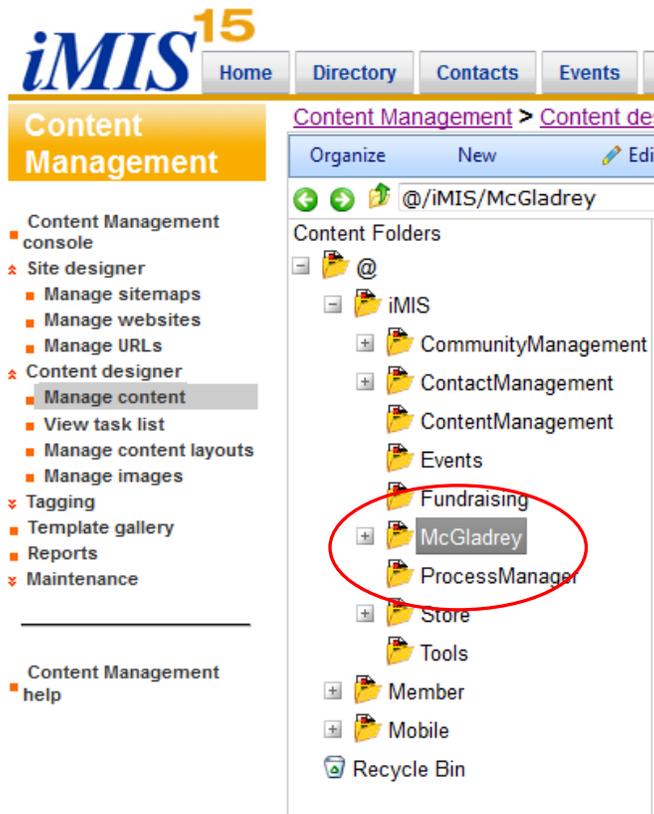
5. Create an IQA query for the selector page

If the pagepart (panel) is not being displayed in Simple Mode, then a selector query is required to group and display the data properly. For instance, if all continuing education credits need to display by year, then a selector is needed to group all credits by year.



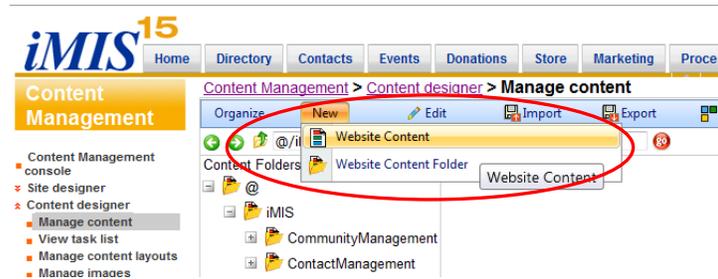
6. Create a place for the content

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



7. Create new content for the selection page of the activities

- a. Choose New
- b. Choose Website Content

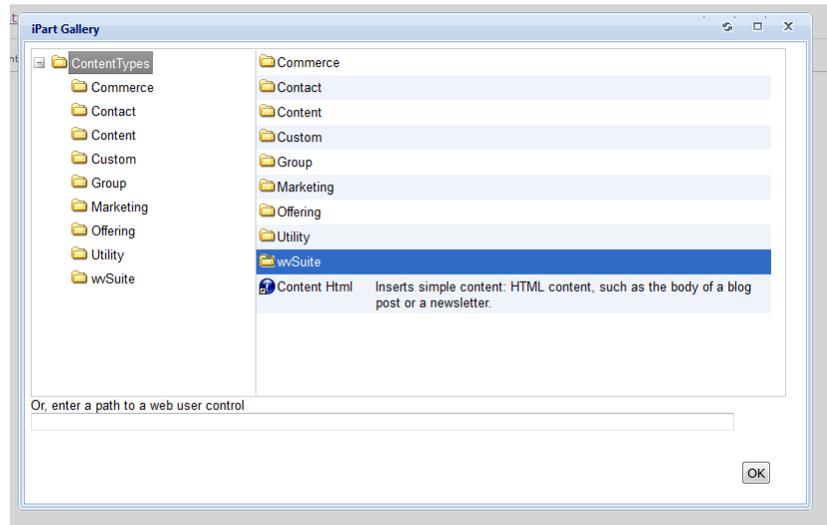


- c. Title the new content CEUSelector

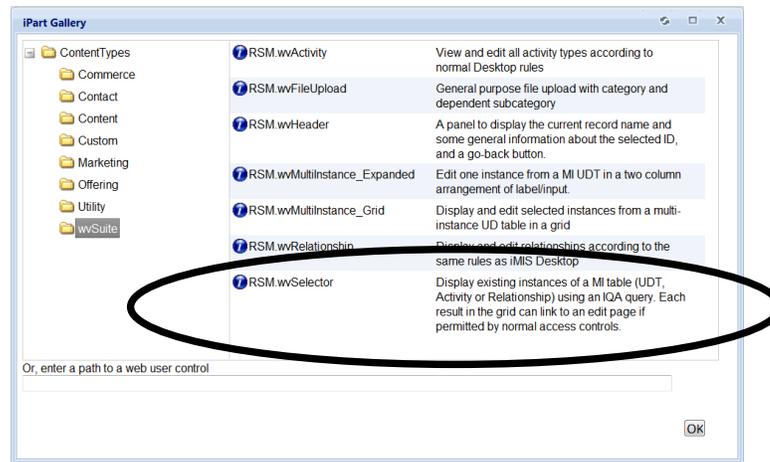
A screenshot of the 'Content Designer' form. The status is 'Published'. The 'Definition' tab is active. The form contains the following fields:

- Title**: CEUSelector
- Publish File Name**: CEUSelector
- Content Layout**: SingleColumn (with a layout icon)
- Publish Location**: <http://localhost/iMIS15/iMIS/McGladrey/CEUSelector.aspx>

d. Click add content and select the wvSuite folder



e. Choose the RSM.wvSelector in the wvSuite directory



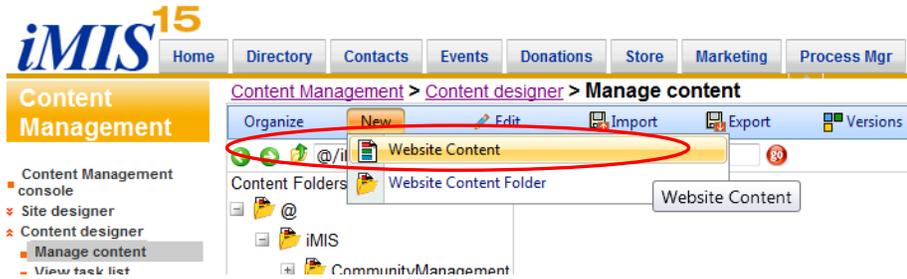
8. Configure the RSM.wvSelector iPart

Values for fields:

Field	Description	Value
Name	<i>Unique Identifier of the part on the display page</i>	CEUSelector
Section Title	<i>Title on the page followed by selected name</i>	Selector Periods
Instructions	<i>Instructions are displayed below the title</i>	Choose a period in which you want to enter CEUs. If the year is not there, please enter it by inserting the year in the box and clicking Create New
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:	<i>Page that will be navigated to on select or create new</i>	~/iMIS/McGladrey/CEUDetail.aspx
Child Page Type:	<i>Type of Child page</i>	Page: CEU
Allow "Create New" Button:	<i>If a new item can be created in the target page.</i>	Selected
Allow user to choose selector value on "Create New":	<i>Allow the user to define the selector value on the new item</i>	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>	\$/RSMCustomizations/iParts/SelectorPage/CEUSelector
IQA Query settings	<i>These are the filters for the query. When this iPart is used in the web view of iMIS (staff view), iMIS ID Equals normally choose Auto Assign and Selected iMIS ID. For public views, use Auto Assign and Logged In iMIS ID</i>	
Display Type		Select Auto Assign
Value		Selected iMIS ID

9. Create the CEU (MultiInstance) Detail page

- a. Choose New
- b. Choose Website Content



- c. Title the new content MultiInstanceDetails

Content Designer

Status: Published

Definition Properties Current Tags Access Settings

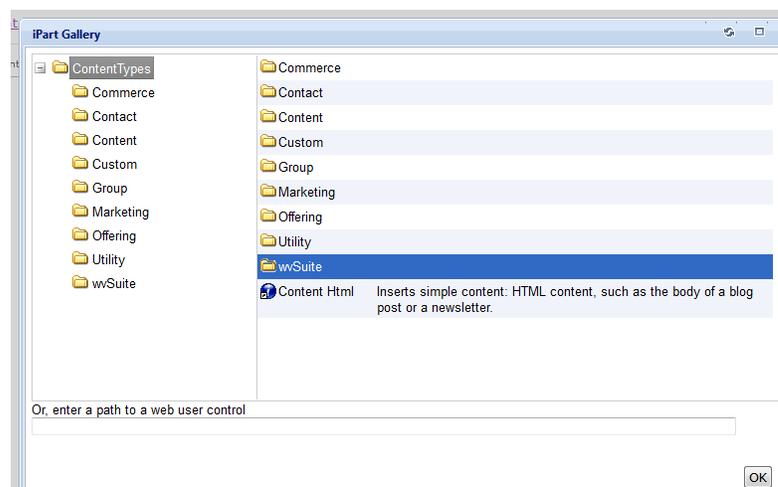
*Title

*Publish File Name

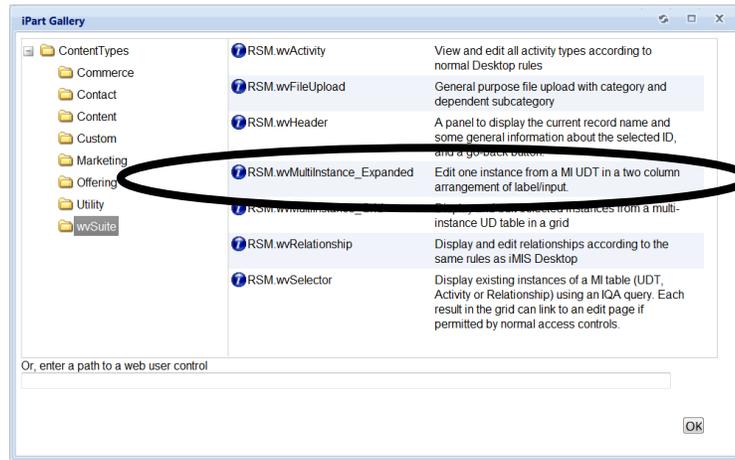
Content Layout

Publish Location <http://localhost/iMIS15/iMIS/McGladrey/CEUDetail.aspx>

- d. Click add content and select the wvSuite folder



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



- f. Configure RSM.wvMultiInstance_Expanded

Configure iPart - RSM.wvMultiInstance_Expanded

*Name

wvMultiInstance (Expanded) configuration

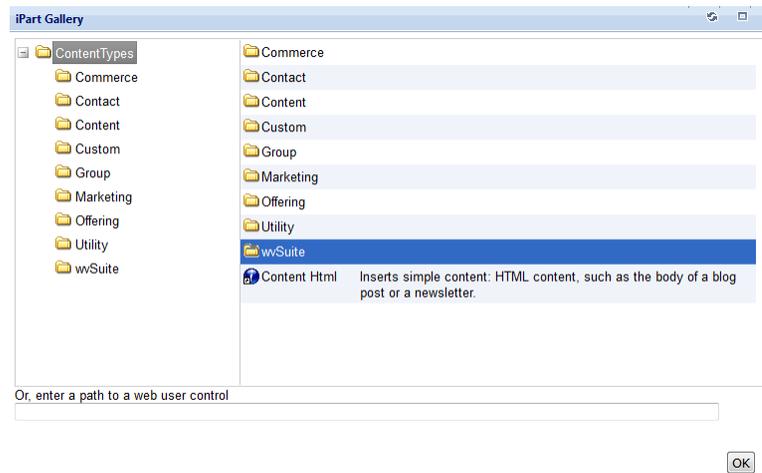
*PagePart to display here:

Section Title:

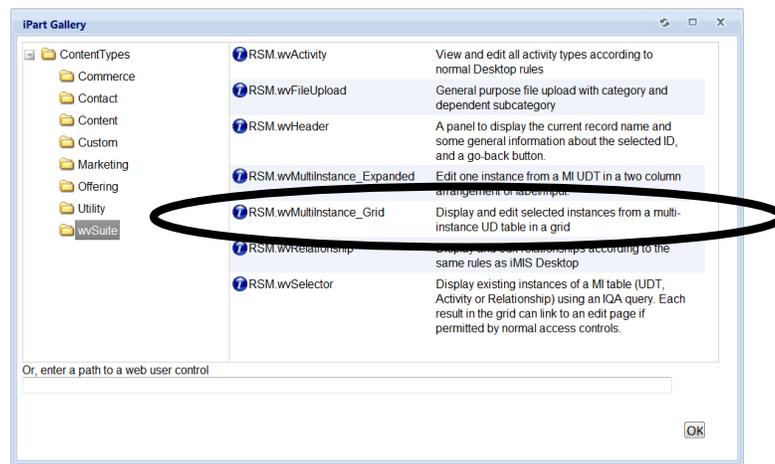
wvSuite version 1.0.6575.1090
 RSMSQLCLR version 1.0.6531.1000
 Common version 1.0.6528.1000

Field Values	Value
Name	CEUHeader
PagePart to display	CEU.HEADER
Section Title	CEU Period

- g. Click add content and select the wvSuite folder



- h. Choose the RSM.wvMultiInstance_Grid in the wvSuite directory



- i. Configure RSM.wvMultiInstance_Grid

Configure iPart - RSM.wvMultiInstance_Grid

*Name:

wvMultiInstance (Grid) configuration

PagePart:

Section Title:

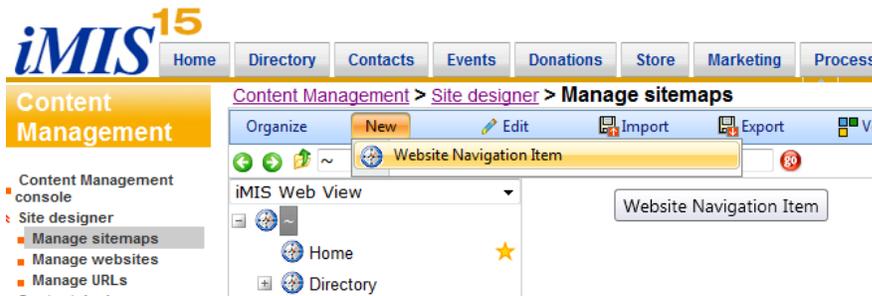
Simple Mode:

vvSuite version 1.0.6575.1090
 RSMSQLCLR version 1.0.6531.1000
 Common version 1.0.6528.1000

Field Values	Value
Name	CEUDetail
PagePart to display	CEU.DETAIL
Section Title	CEU Details
Simple Mode	Unselected

10. Add a navigation item for the CEU selection information.

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



Status: Published

Properties

Workflow Management

Options

Access Settings

* Navigation Link Text

* Navigation Folder Name

Tool Tip Description
[?](#)

Content or URL to Link to [select](#) [?](#)

Or select a standard page:
 [?](#)

URL Parameters

Breadcrumb Name [?](#)
 Hide on this page

Override Content Title [?](#)

Navigation Code [?](#)

Image URL [select](#)

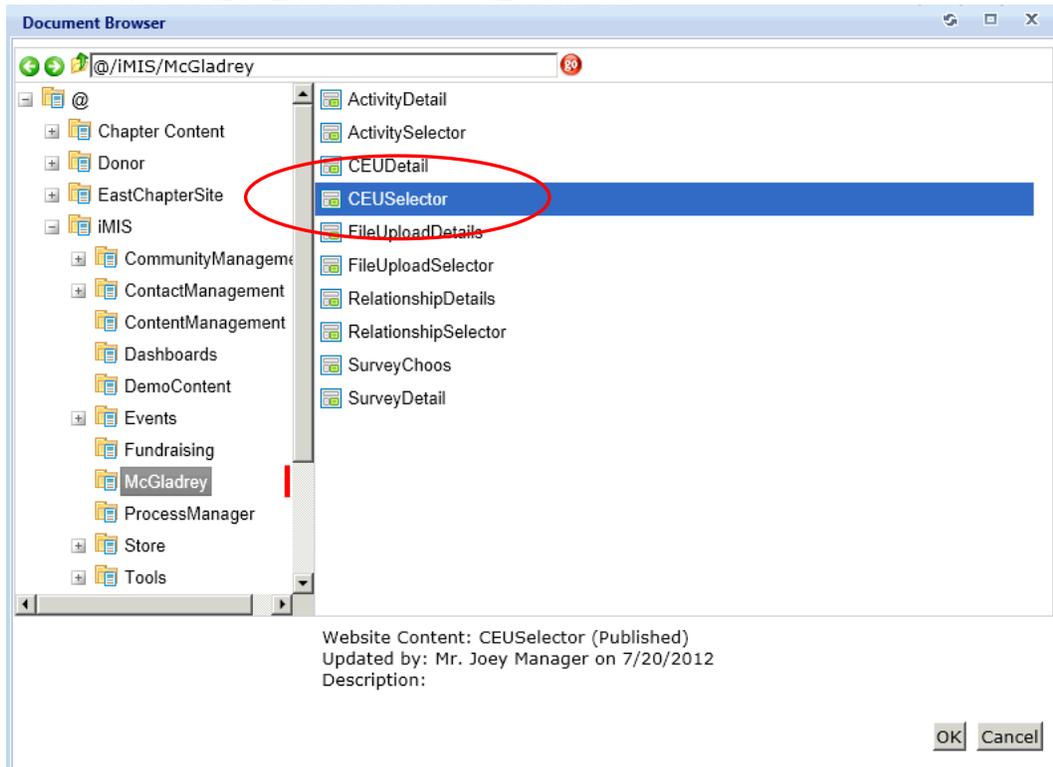
CSS Class

Folder containing template gallery content

Inherit from parent



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



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

11. System Setup:

These settings can be found under System Setup->RSM Configuration
You can place all types that are not allowed in the text box.

Default folder for FindID searches in wvMultiInstance and wvRelationship
(RSM.wvUtility.FindIDFolder)



Examples of Fully Configured wvMultiInstance iParts

CEU Selector Page:

Contacts > CEUs

Selector Periods Christopher Baker, Opus, Inc.

Choose a period in which you want to enter CEUs. If the year is not there, please enter it by inserting the year in the box and clicking Create New

New Period:

Period	Total Hours
2008	5
2009	4

Data returned by the Selector Query

Link to advance to Details page

CEU Details Page:

Contacts > CEUs

CEU Period

CEU Year: 2008
Total CEU: 5

CEU Detail

	Date Reporting	Type of CEU	Event where CEU earned	Name of the course	Notes about CEU	Staff followup about...	Method CEU received	Number of hours
	2008-08-14T00:00:00	CONT	COM	Board Meeting			INTERNAL	2
	2012-02-23T00:00:00	Business	conference	Course 101				3

Link to add a new record

Edit or delete icon

Expanded CEU Details Page to enter or update data:

[Contacts](#) > **CEUs**

CEU Period

CEU Year:

Total CEU: 5

CEU Detail

[+ Add new record](#)

	Date Reporting	Type of CEU	Event where CEU earn...	Name of the course	Notes about CEU	Staff followup about...	Method CEU received	Number of hours
	2008-08-14T00:00:00	CONT	COM	Board Meeting			INTERNAL	2
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Date Reporting: <input type="text" value="8/14/2008"/> </p> <p>Type of CEU: <input type="text" value="CONT"/></p> <p>Event where CEU earned: <input type="text" value="COM"/></p> <p>Name of the course: <input type="text" value="Board Meeting"/></p> <p>Notes about CEU: <input type="text"/></p> <p>Staff followup about CEU: <input type="text"/></p> <p>Method CEU received: <input type="text" value="INTERNAL"/></p> <p>Number of hours: <input type="text" value="2"/></p> <p>Update Cancel</p> </div>								
	2012-02-23T00:00:00	Business	conference	Course 101				3

