

# ***User Manual*** ***wvFileUpload for iMIS***



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# wvFileUpload User Manual

## Version 2.0

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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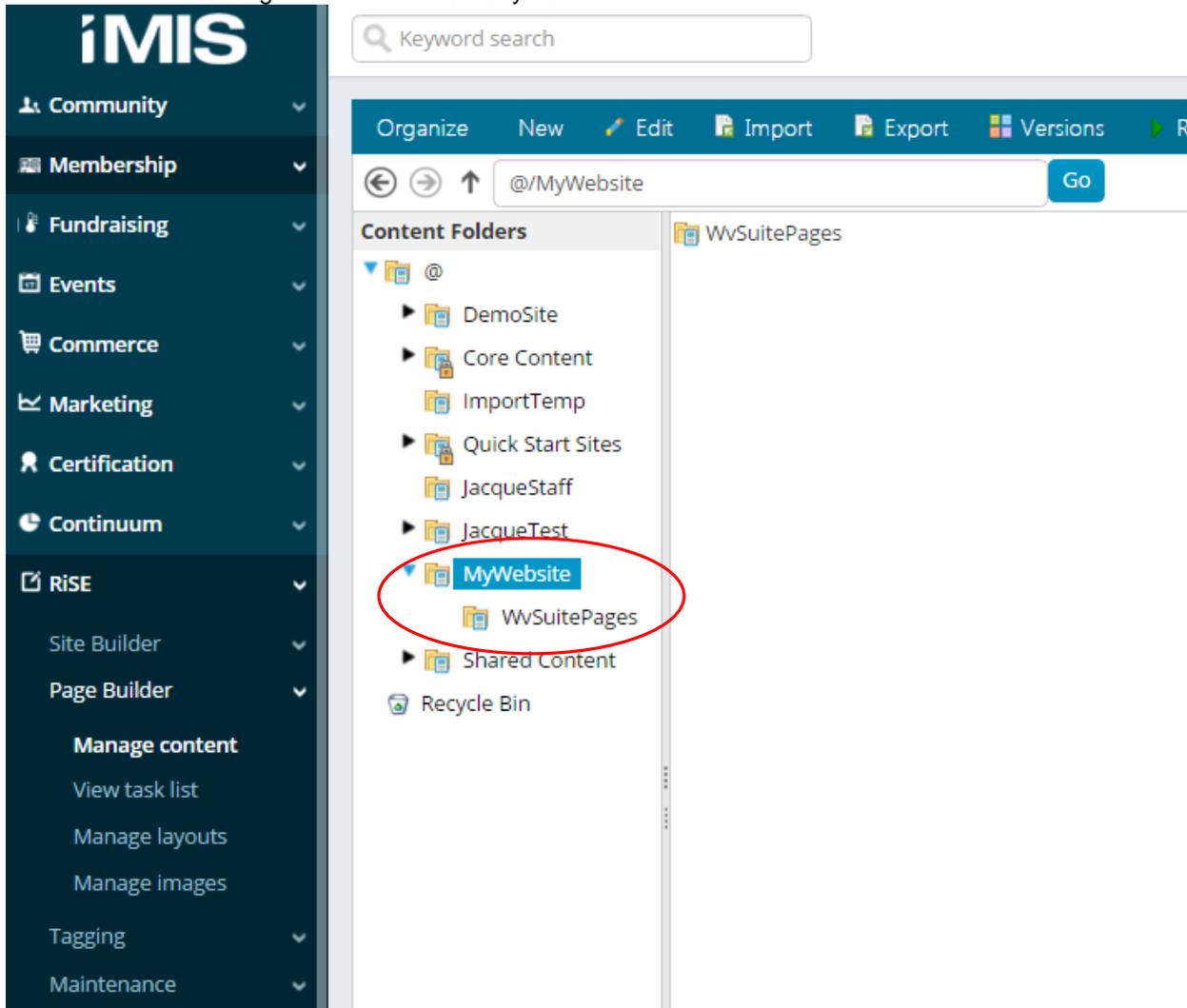
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# wvFileUpload

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

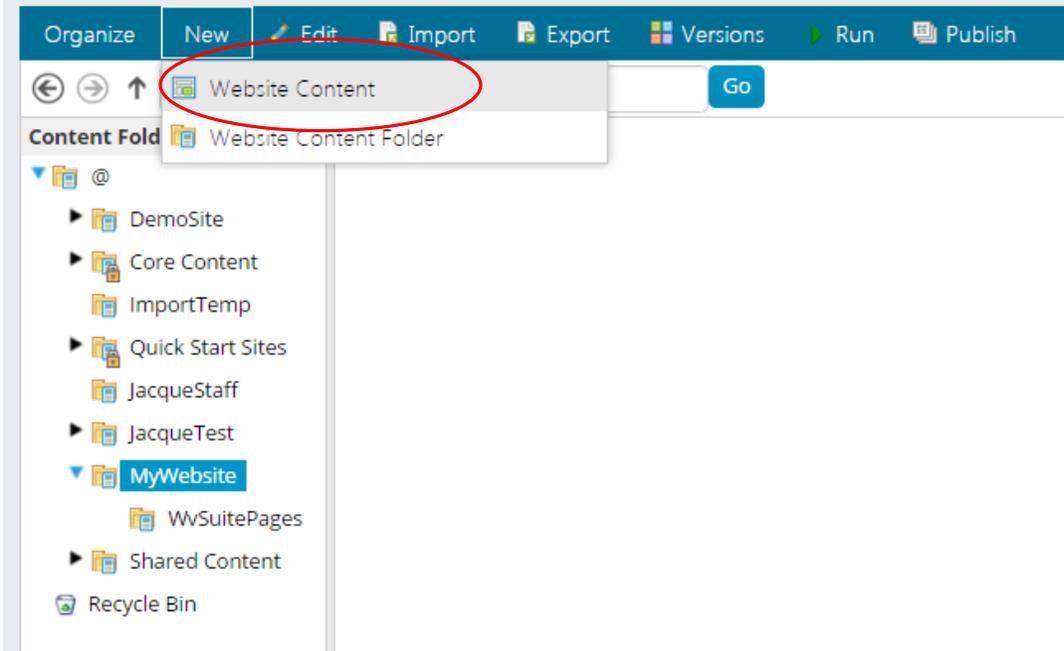
## 1. Create a place for the content

- a. Go to RiSE->Page Builder->Manage Content
- b. Create a new folder within your site in which you wish to place your content, or use an existing content folder within your site



## 2. Create new content for the selection page of uploads

- a. Choose New
- b. Choose Website Content



c. Title the new content FileUploadChoose

Manage content

**Status: (Working) Last updated on 4/25/2016 11:01:35 AM**

Definition | Properties | Current tags | Access settings

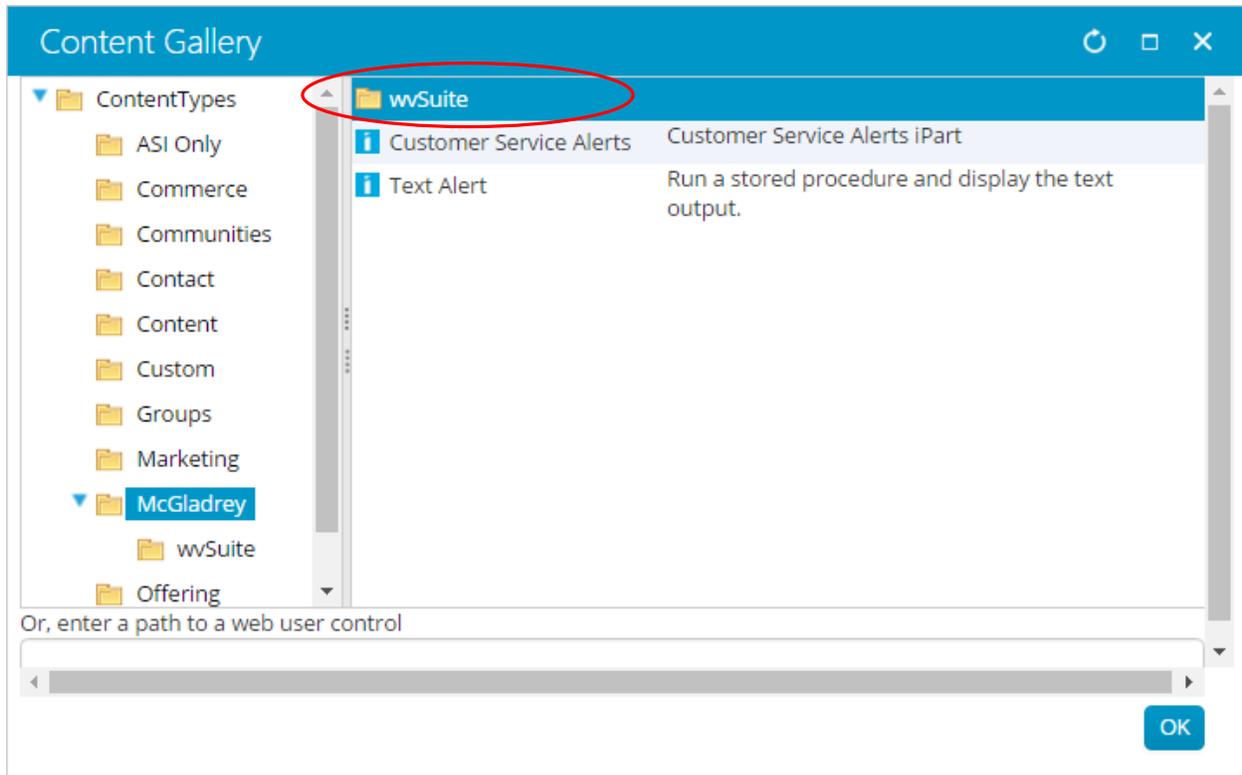
### FileUploadChoose

- Title**   Use dynamic page title
- Publish file name**
- Layout**
- Publish location** <http://localhost/IMISClean/JacqueTest/Contacts/ContactLayouts/FileUploadChoose.aspx>  
Click appropriate button to generate a full URL or free link to copy elsewhere.
- Create navigation on publish

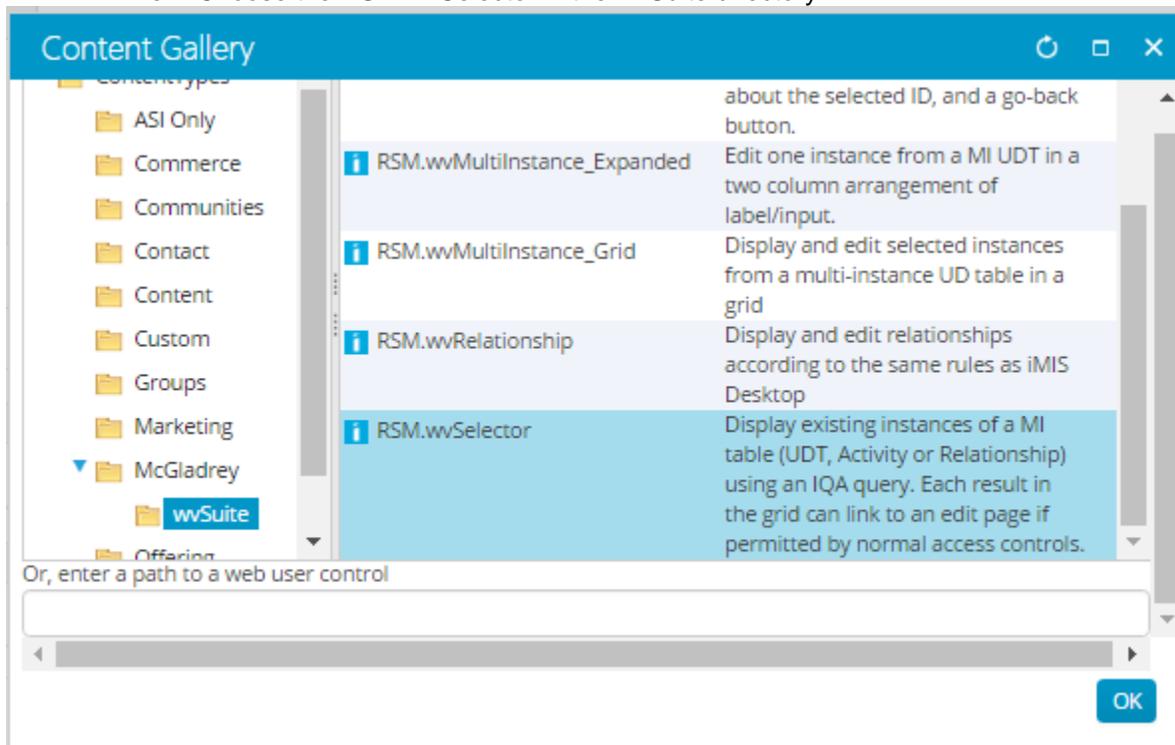
[Add content](#) | [Edit zone properties](#)

To add content, click the "add content" link above.

d. Click add content and select the wwSuite folder



e. Choose the RSM.wvSelector in the wvSuite directory



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### 3. Configure the RSM.wvSelector ipart

Configure iPart - RSM.wvSelector
⊞ ⊠ ×

**Name**

**Title**

Do not render in design mode

**iPart CSS class**

Display a border around this content

Display content within a collapsible panel

Show the content as collapsed

**Display on screen sizes (for responsive themes only):**

---

**wvSelector configuration**

**This section**

**Section title**

**Instructions**

**PageCode for this page**

Lock with parent page

**Detail page**

**Target URL for detail of found records**

**Child page type**

Include ID on URL

**Creating new items**

Allow "Create New" button

User-assigned selector

**Tooltip on "Create New" button**

Log changes

**Maximum unclosed items**

**Maximum unsubmitted items**

**Message when maximum unclosed or maximum unsubmitted items prevents "Create New"**

**IQA Query**

**IQA Query:**  [select](#)

Note: if you modify the query definition, you must return here, save and publish.

**IQA Query settings.**

#	Display Name	Display Type	Value
1	IMIS Id Equals	<input type="text" value="Auto Assign"/>	<input type="text" value="Selected IMIS ID"/>

**Filtering by column** ⌵

**Navigation by Column** ⌵

**Formatting Options** ⌵

webSite version 1.0.10000.1000  
 HqsLibrary version 1.0.10074.1000  
 HqsQuery version 1.0.10005.1000

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Values for fields:

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Name	Description	Value
Name	<i>Unique Identifier of the part on the display page</i>	FileUploadChoose
Section Title	<i>Title on the page. Use {0} if you want the current record's name included.</i>	Uploaded Files for {0}
Instructions	<i>Instructions are displayed below the title</i>	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:	<i>Page that will be navigated to on select or create new</i>	~/iMIS/McGladrey/FileUploadDetails.aspx
Child Page Type:	<i>Type of Child page</i>	FileUpload
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>	Click Select -> Select FileUploadSelector (sample one is provided) \$/RSMCustomizations/iParts/SelectorPage/FileUploadSelector
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		Select "Selected iMIS ID"

**4. Save and Publish FileUploadChoose**  
(Below File Upload Choose end result)

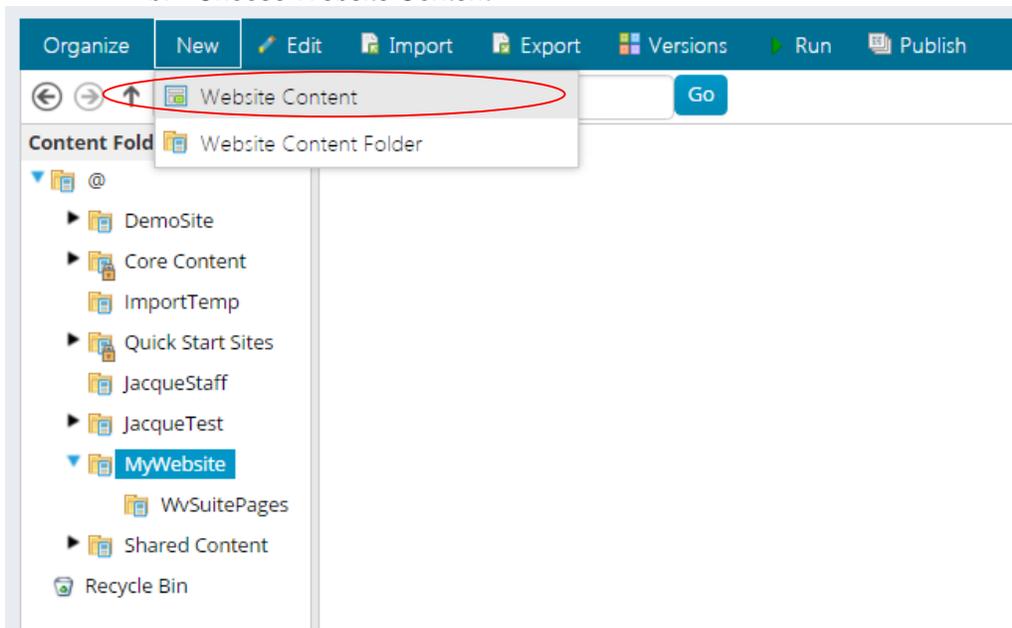
### Uploaded Files for Alex Morgan, Versaton US

Click of the links in order to see the uploaded file. Otherwise click create new.

[+ Create New](#)

<a href="#">Date Uploaded</a>	<a href="#">Category</a>	<a href="#">Attachment Type</a>	<a href="#">Effective Year</a>	<a href="#">Description</a>	<a href="#">Uploaded File</a>	<a href="#">Date Uploaded</a>
<a href="#">5/9/2018 12:00:00 AM</a>	CERT	CERT.OTHER	2018	Resume	XYZ test resume.docx	05/09/2018
<a href="#">5/9/2018 12:00:00 AM</a>	CERT	CERT.OTHER	2013		XYZ test resume.docx	05/09/2018
<a href="#">5/3/2018 12:00:00 AM</a>	CERT	CERT.OTHER	2017	Resume	XYZ test resume.docx	05/03/2018
<a href="#">5/3/2018 12:00:00 AM</a>	CERT	CERT.OTHER	2018	Resume	XYZ test resume.docx	05/03/2018

**5. Create the File Upload Detail page**  
 a. Choose New  
 b. Choose Website Content



The screenshot shows a software interface with a top navigation bar containing buttons for 'Organize', 'New', 'Edit', 'Import', 'Export', 'Versions', 'Run', and 'Publish'. Below this is a secondary bar with navigation arrows and a 'Go' button. A dropdown menu is open under the 'New' button, with 'Website Content' highlighted and circled in red. Below the dropdown is a 'Content Fold' sidebar with a tree view of folders: '@', 'DemoSite', 'Core Content', 'ImportTemp', 'Quick Start Sites', 'JacqueStaff', 'JacqueTest', 'MyWebsite' (selected), 'WvSuitePages', 'Shared Content', and 'Recycle Bin'.

c. Title the new content FileUploadDetails

Content Designer RSM US LLP

Status: (Published)

Definition | Properties | Current tags | Access settings

### FileUploadDetails

- Title**   Use dynamic page title
- Publish file name**
- Layout**  
- Publish location** <http://localhost/iMISClean/jacqueTest/Contacts/ContactLayouts/FileUploadDetails.aspx>  
Click appropriate button to generate a full URL or free link to copy elsewhere.

[Add content](#) | [Edit zone properties](#)

To add content, click the "add content" link above.

d. Click add content and select the wvSuite folder

Content Gallery 🔄 □ ✕

ContentTypes	<b>wvSuite</b>	
ASI Only	Customer Service Alerts	Customer Service Alerts iPart
Commerce	Text Alert	Run a stored procedure and display the text output.
Communities		
Contact		
Content		
Custom		
Groups		
Marketing		
<b>McGladrey</b>		
wvSuite		
Offering		

Or, enter a path to a web user control

e. Choose the RSM.wvFileUpload in the wvSuite directory

## 6. Configure RSM.wvFileUpload

Configure iPart - RSM.wvFileUpload

**Name** FileUploadDetail

**Title**

Do not render in design mode

**iPart CSS class**

Display a border around this content

Display content within a collapsible panel

Show the content as collapsed

Display on screen sizes (for responsive themes only):

**wvFileUpload configuration**

**Activity Type** Upload (UPLOAD)

**URL to return to** ~/MyWebsite/WwSuitePages/FileUploadChoose.aspx

**PageCode of the parent page** (None)

Include ID on URL

Log changes

**Allowed upload roles**

- Everyone
- OnBehalfOf
- Privileged
- SysAdmin

**Allowed delete roles**

- Content Administrator
- Everyone
- OnBehalfOf
- Privileged
- SysAdmin

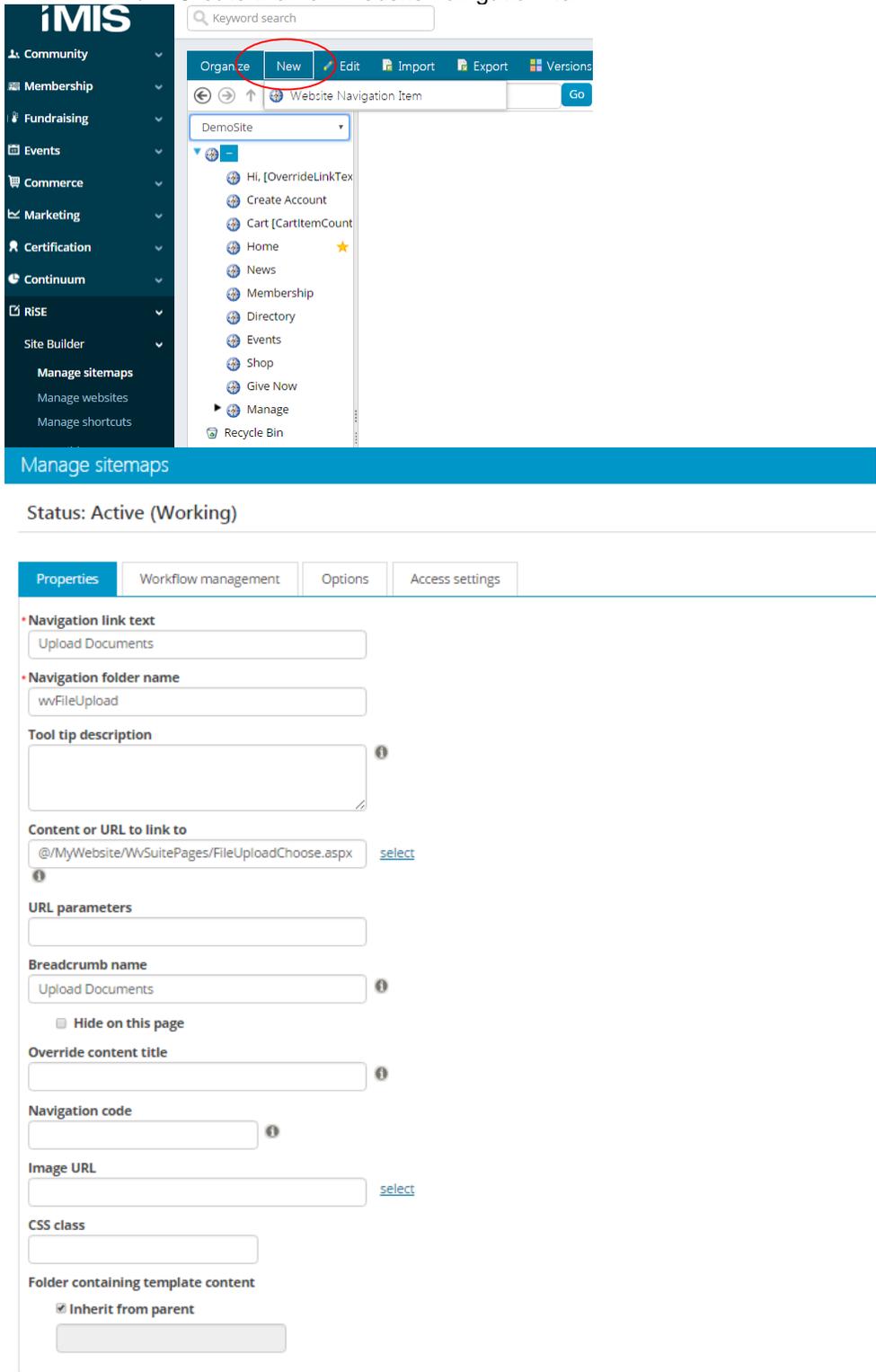
wvSuite version 1.0.10689.1000  
McGladrey.Library version 1.0.10674.1000  
RSMSQLCLR version 1.0.10686.1000

OK Cancel

Field	Value
Name	FileUploadDetail
Activity Type	By default this will be set to the UPLOAD activity. You can configure other activity options. This is explained why and how in <b>step 8</b>
URL to Return To:	~/YourSiteFolder/YourContentFolder/FileUploadChoose.aspx
PageCode of the parent	(None)

7. 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



The screenshot shows the iMIS interface. The top navigation bar includes 'Organize', 'New', 'Edit', 'Import', 'Export', and 'Versions'. The 'New' button is circled in red. Below this is a tree view of the site structure under 'DemoSite', listing items like 'Hi, [OverrideLinkTex]', 'Create Account', 'Cart [CartItemCount]', 'Home', 'News', 'Membership', 'Directory', 'Events', 'Shop', 'Give Now', 'Manage', and 'Recycle Bin'. The 'Home' item has a star icon.

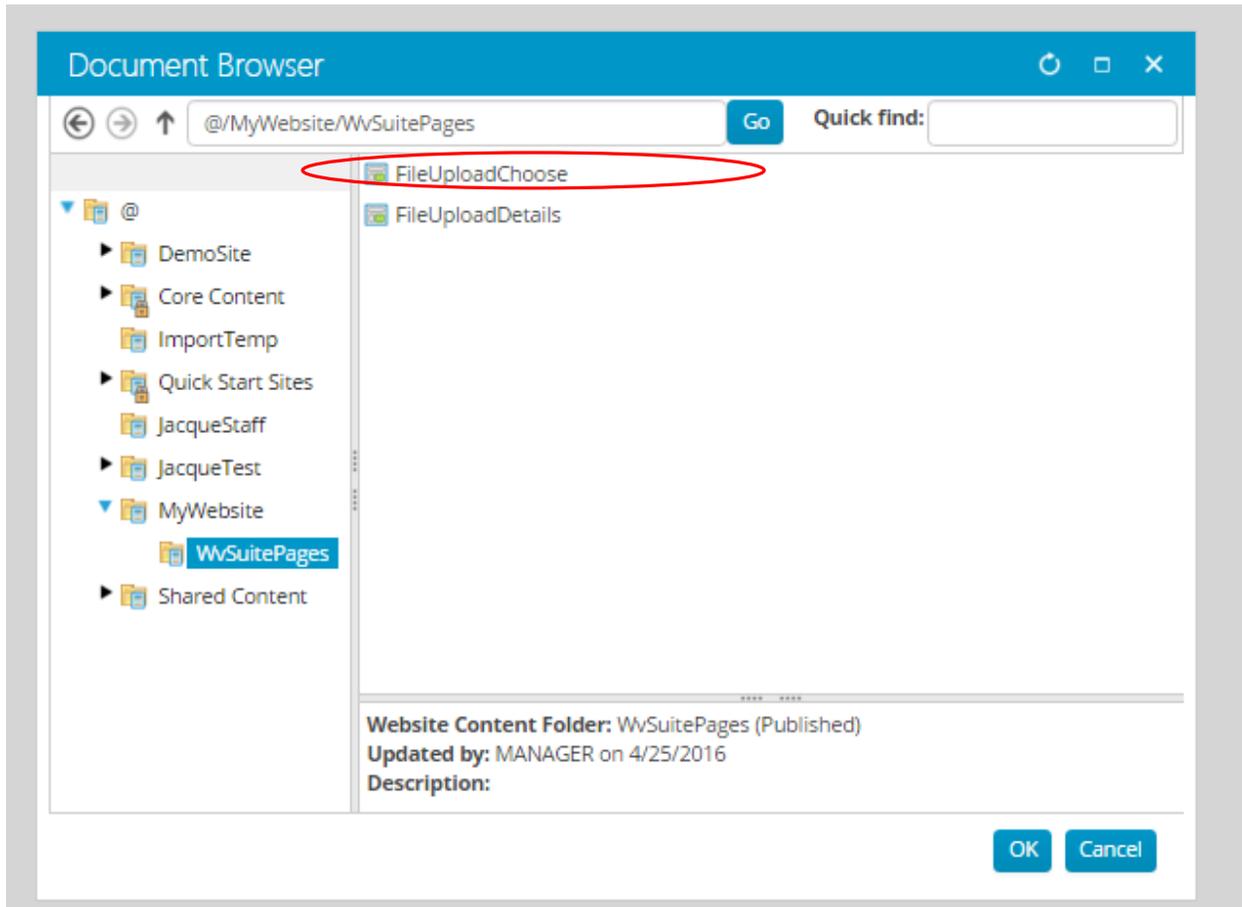
The main content area is titled 'Manage sitemaps' and shows the status 'Active (Working)'. It features several tabs: 'Properties', 'Workflow management', 'Options', and 'Access settings'. The 'Properties' tab is active and contains the following fields:

- Navigation link text:** Upload Documents
- Navigation folder name:** wwFileUpload
- Tool tip description:** (Empty text area)
- Content or URL to link to:** @/MyWebsite/WwSuitePages/FileUploadChoose.aspx [select](#)
- URL parameters:** (Empty text field)
- Breadcrumb name:** Upload Documents
- Hide on this page**
- Override content title:** (Empty text field)
- Navigation code:** (Empty text field)
- Image URL:** (Empty text field) [select](#)
- CSS class:** (Empty text field)
- Folder containing template content:**  **Inherit from parent**

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

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

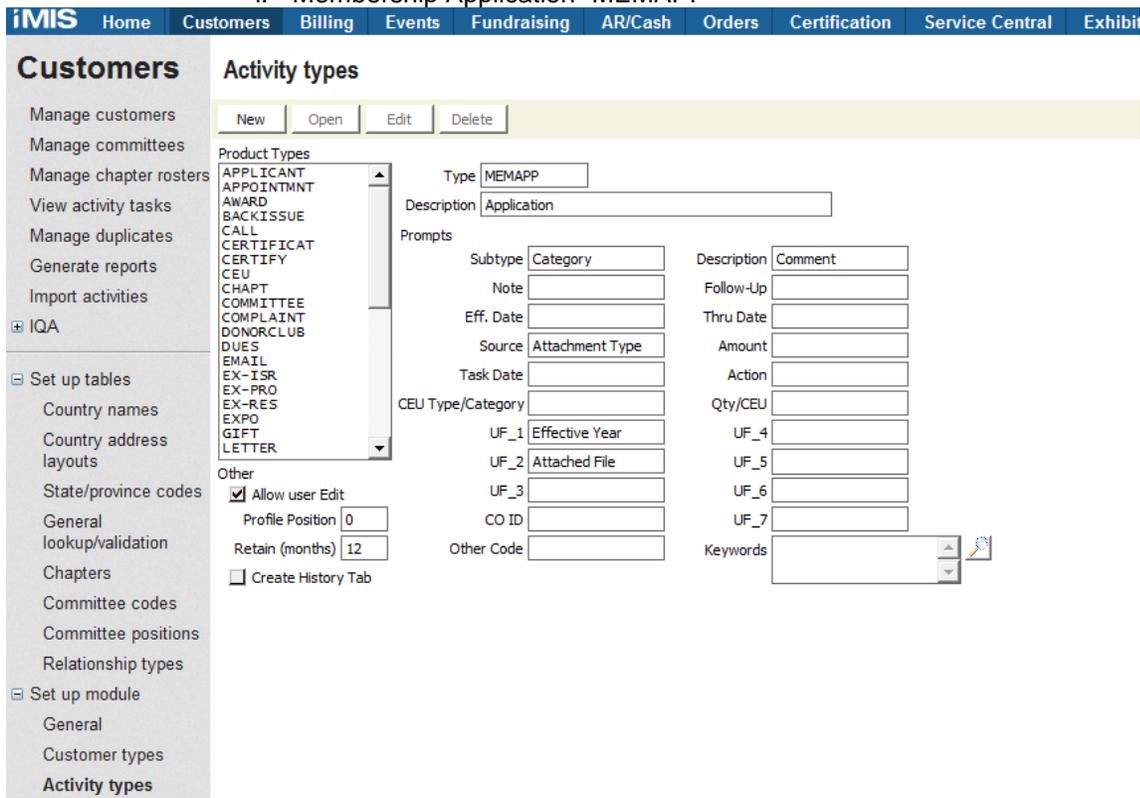
## 8. Activity Type configuration

### wvFileUpload configuration

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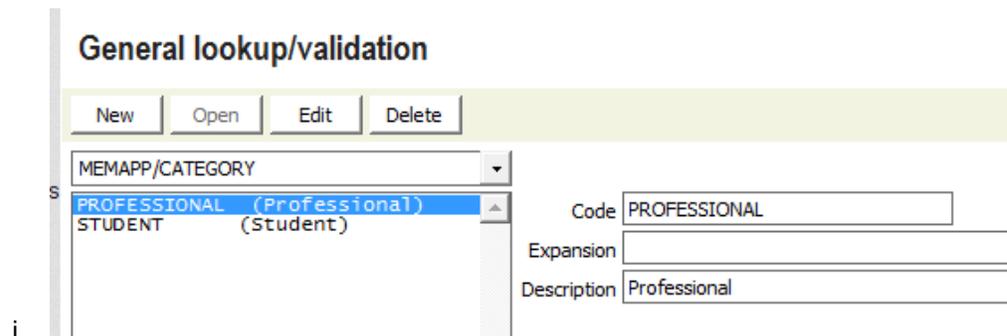
Activity Type (None) ▼

- a.
- b. A use case for this would be when there are two separate activities that users can upload documents for. Each activity has different attachment types to choose from (I.E. Membership applications and Certifications)
- c. Create activity types for each activity
  - i. Membership Application- MEMAPP



The screenshot shows the iMIS 'Activity types' configuration interface. The top navigation bar includes Home, Customers, Billing, Events, Fundraising, AR/Cash, Orders, Certification, Service Central, and Exhibits. The left sidebar lists various management tasks under 'Customers' and 'Set up module'. The main area is titled 'Activity types' and contains a 'New' button and a list of 'Product Types' including APPLICANT, APPOINTMNT, AWARD, BACKISSUE, CALL, CERTIFICAT, CERTIFY, CEU, CHAPT, COMMITTEE, COMPLAINT, DONORCLUB, DUES, EMAIL, EX-ISR, EX-PRO, EX-RES, EXPO, GIFT, and LETTER. The 'Other' section has a checked 'Allow user Edit' box and fields for 'Profile Position' (0) and 'Retain (months)' (12). The 'Prompts' section includes fields for Subtype (Category), Note, Eff. Date, Source (Attachment Type), Task Date, CEU Type/Category, UF\_1 (Effective Year), UF\_2 (Attached File), UF\_3, CO ID, Other Code, Description (Application), Comment, Follow-Up, Thru Date, Amount, Action, Qty/CEU, UF\_4, UF\_5, UF\_6, UF\_7, and Keywords.

- d. Create general lookup table – Category



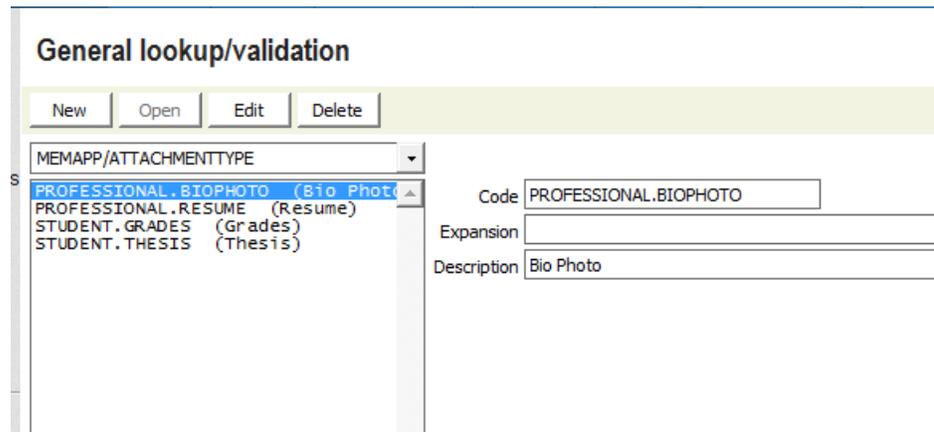
The screenshot shows the 'General lookup/validation' screen. It features a 'New' button and a dropdown menu with 'MEMAPP/CATEGORY' selected. Below the dropdown is a list of items: 'PROFESSIONAL (Professional)' and 'STUDENT (Student)'. The 'PROFESSIONAL (Professional)' item is highlighted. To the right of the list are input fields for 'Code' (PROFESSIONAL), 'Expansion', and 'Description' (Professional).

- i.

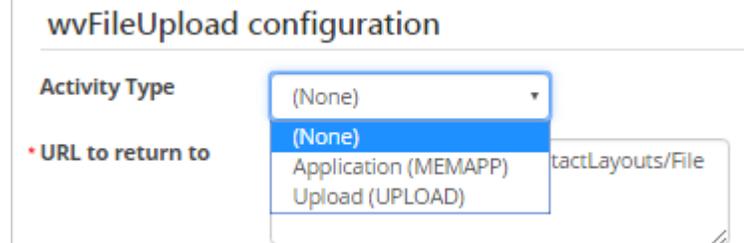
e. Create general lookup table – Attachment Type

- i. Attachment type table: When creating the attachment type look up table you should name the table ACTIVITYNAMECODE/ATTACHMENTTYPECODE
- ii. Attachment type table values: The dropdown menu for attachment type is derived based on the subheading for the code. For example all the attachment types with the subheading PROFESSIONAL.XXX in the code field will be displayed when the Category Professional is selected in the category drop down.
  - 1. i.e. The values in the table should be named as CATEGORYCODE.NAMEOFATTACHMENTTYPECODE so the correct attachments are pulled for each category

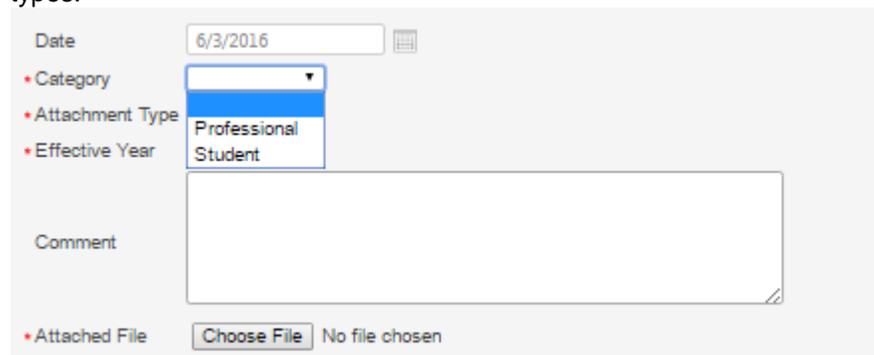
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- iii.
- f. FileUpload iPart configuration will now show your new option (selecting (none) will cause the iPart not to function correctly. By default you should choose Upload.

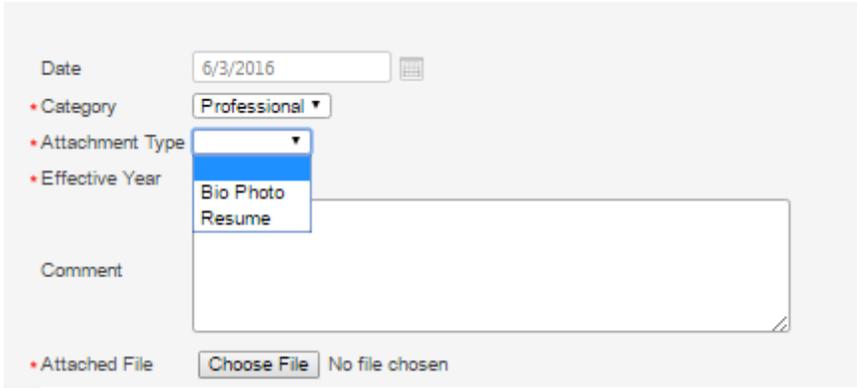


- i.
- g. Example – selecting MEMAPP
  - i. The user only sees the MEMAPP categories and attachments types linked to each category. The user will not see the UPLOAD categories or attachment types.



ii.

iii.



The screenshot shows a web form with the following fields:

- Date: 6/3/2016
- Category: Professional
- Attachment Type: (dropdown menu with options Bio Photo and Resume)
- Effective Year: (empty)
- Comment: (text area)
- Attached File: Choose File (button) No file chosen

### 9. System Setup:

These settings can be found under RiSE->RSM Configuration

Please Note:

- the upload path may have to be changed to where the copy of iMIS lives, also a download folder may have to be created
- If you don't use the default download folder in the iMIS directory, a change will have to be made in IIS so the system will recognize where the Download folder lives
- If no change needs to be made in IIS the folder must be named Download i.e D:\Uploads will not work

**Comma-separated list of file extensions to be rejected by the FileUpload component. (RSM.vvFileUpload.ExtensionBlacklist)**

.aspx,.ascx,.asmx,.ashx,.asp,.axd,.cer,.dll,.exe,.config,.master,.php,.cfm,.bat

**Upload path for vvFileUpload iPart (RSM.vvFileUpload.UploadPath)**

C:\Program Files (x86)\ASI\iMIS15\Net\Download\

**Upload virtual path for vvFileUpload iPart (RSM.vvFileUpload.UploadVirtualPath)**

~/Download/