



WVACTIVITY MANUAL

MODULE OF WVSUITE

version 2.0

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

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Preparing for wvActivity content

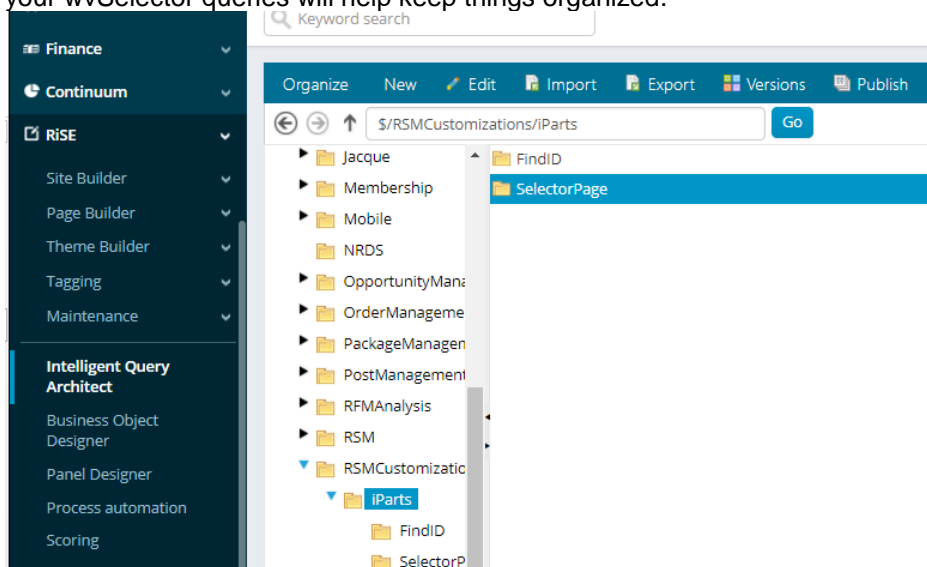
The following steps will help you plan how you will use wvActivity and simplify the creation of content.

wvSuite must be installed before you can start working with wvActivity. If you have not installed wvSuite yet, follow the steps in the wvSuite Installation Manual.

wvActivity is the iPart for viewing and editing a single Activity. In this manual, this is called the Detail page. You will also need a page for viewing a list of Activity records. This uses the wvSelector iPart, and is referred to as the Selector page. Clicking one of the activities shown on the Selector page will take you to the detail page. The rows shown in wvSelector are controlled by an IQA query.

1. Choose a folder for the IQA queries for wvSelector

wvSelector has specific requirements for queries. It often makes sense to put all your Selector queries together in a folder created for this purpose. Creating a folder to hold your wvSelector queries will help keep things organized.

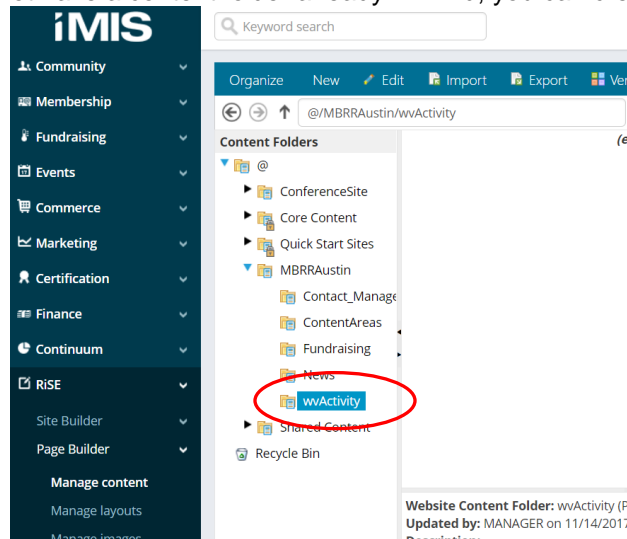


2. (Optional) Import sample queries included in the wvSuite iPackage

A sample selector query is provided with the install of wvSuite. The file can be found where iMIS is installed, for example under C:\Program Files (x86)\ASI\iMIS\net\iParts\McGladrey\wvSuite\Documentation. If you want the example available, import the wvSuite_Examples.xml file into the iMIS document system. For help importing, see standard ASI documentation for your version of iMIS.

3. Choose a content folder for the Selector and Detail content pages.

It is recommended to keep the Selector and Detail pages in the same folder. You can store them in a folder within a specific website, or in Shared_Content, or other locations. If you do not have a content folder already in mind, you can create one for this purpose.



4. Decide on the filenames for the Selector and Detail pages

Well-chosen names can make setup easier to understand, and make the URL seen by your web visitors less cryptic. We recommend giving the pages the same name, but ending in “Choose” or “Detail”. For example, ActivityChoose and ActivityDetail. The “Publish file name” on the selector page needs to be configured in the detail page, and the filename of the detail page is part of the configuration of the selector page.

Apart from the filenames, you will also need to know the full path of each page. Using the example above, if your content is created in the wvActivity folder, which lives inside the MBBAustin folder, which is under the @ root, and the publish file names are ActivityChoose and ActivityDetail, the configuration values you will need later are:

~/MBRRAustin/wvActivity/ActivityChoose.aspx

~/MBRRAustin/wvActivity/ActivityDetail.aspx

5. Global configuration

When configured normally, wvActivity will allow users to view and edit activity types according to their level of access to iMIS and the Access Keywords on each activity type. In some cases, you may want to prevent certain activity types from being viewed on the web even if the user could normally see it.

On the RSM Configuration page (RiSE -> RSM Configuration), find the TypesBlacklist setting:

Activity types which should never be displayed in ActivityEditor even when keywords permit.

[RSM.wvActivity.TypesBlacklist]

CALL,UPLOAD

The wvActivity iPart will refuse to edit any Activity type listed here.

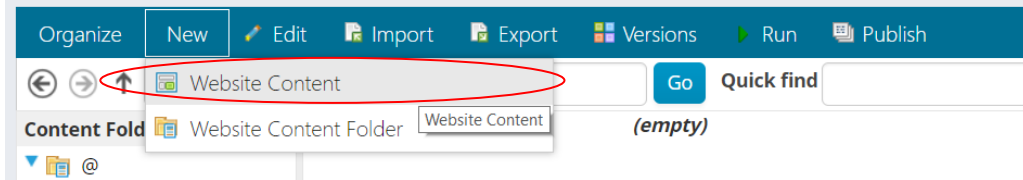
wvSelector does not obey this setting, so you have the option of showing or hiding the activities using IQA filters.

Creating the detail page

The following steps will guide you through creating the detail page and configuring wvActivity.

a. Create the Activity Detail page

- a. Choose New
- b. Choose Website Content

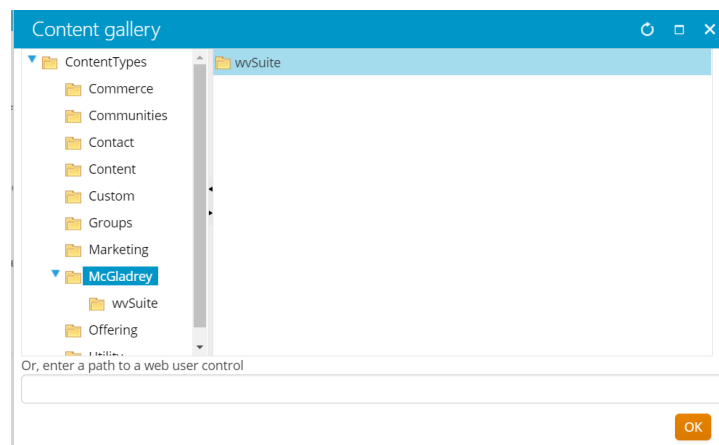


- c. Set Title to text which will make sense to the user. For example, "Activity Details"
- d. Set "Publish file name" to the name you chose earlier. For example, "ActivityDetails" or "AwardDetails"

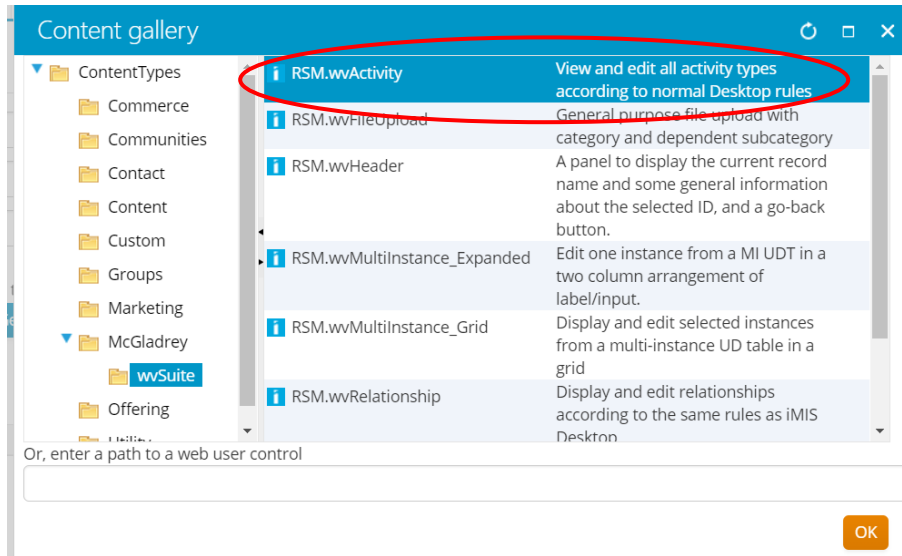
! Status: (Working) Last updated on 11/20/2017 2:01:45 PM

Definition	Properties	Current tags	Access settings
<p>Title <input type="text" value="ActivityDetails"/> <input checked="" type="checkbox"/> Use dynamic page title</p> <p>Publish file name <input type="text" value="ActivityDetails"/></p> <p>Layout <input type="text" value="(None)"/></p> <p>Publish location http://localhost Click appropriate button to generate a full URL or free link to copy elsewhere. <input type="button" value="Generate Full URL"/> <input type="button" value="Generate Freelink"/></p> <p><input type="checkbox"/> Create navigation on publish</p>			

- e. Click "add content" to add a new iPart to the page.
- f. In the Content Gallery, move to the McGladrey > wvSuite folder:



- g. Choose RSM.wvActivity from the list and click OK.



b. Configure RSM.wvActivity

- "Name" is only used to describe the iPart within the Content Designer, but it is recommended change this to "wvActivity" or something else you find helpful.
- "URL to return to" must contain the URL for the Selector page chosen previously, even though this content does not exist yet.
- "Include ID on URL" is required when users may be editing activity records on other people's records. If users will only edit their own activities, the setting is optional but recommended.

wvActivity configuration

*URL to return to

☒ Include ID on URL

Field Values:

Field	Description	Values
Name	Unique Identifier of the part on the display page	Example: ActivityDetail Example: AwardActivityDetail
URL to Return To:	URL where the page should return upon save/close.	~/websitecontentfolder//wvActivity/ActivitySelectorWV.aspx
Include ID on URL		Selected

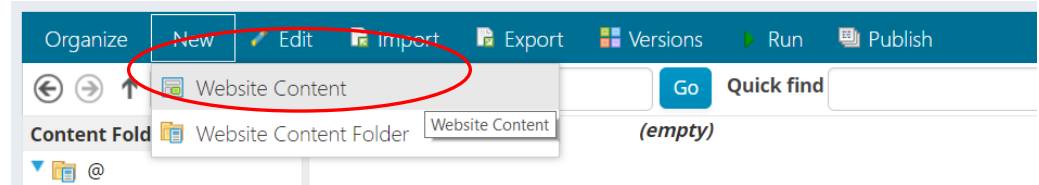
c. Finish the content

- If you wish, you may want to add an HTML Content iPart to the page to provide additional instructions.
- When you are finished with your changes, click Save and Publish.

Creating the selector page

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

- Choose New
- Choose Website Content



- Set Title to text which will make sense to the user. For example, “Choose Activities”
- Set “Publish file name” to the name you chose earlier. For example, “ActivitySelector” or “AwardSelector”

Manage content

Status: (Working) Last updated on 11/14/2017 11:43:41 AM

Definition Properties Current tags Access settings

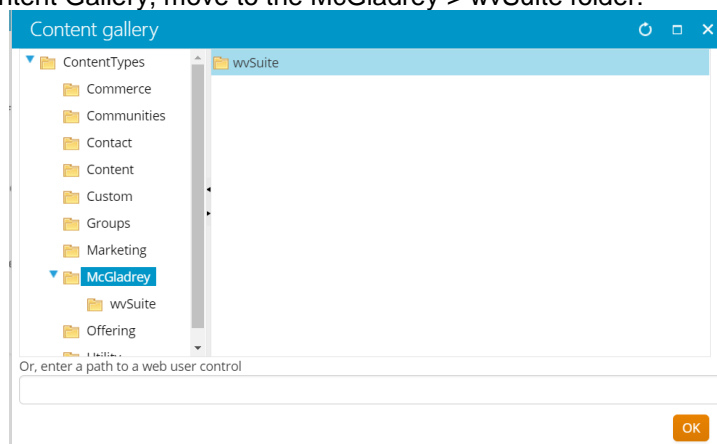
Title ActivitySelectorWV ☒ Use dynamic page title

Publish file name ActivitySelectorWV

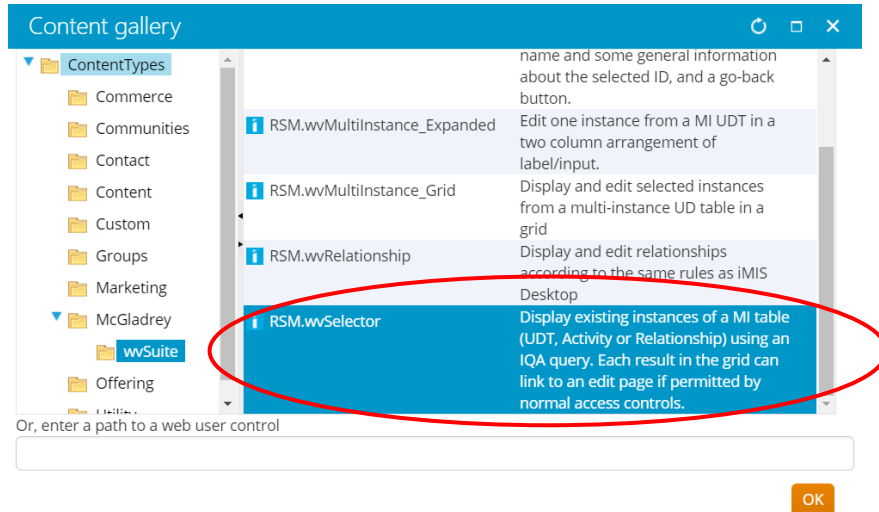
Layout (None)

Publish location <http://localhost>
Click appropriate button to generate a full URL or free link to copy elsewhere.

- Click “add content” to add a new iPart to the page.
- In the Content Gallery, move to the McGladrey > wvSuite folder:



- g. Choose RSM.wvSelector from the list and click OK.



2. Configure the RSM.wvSelector iPart

- a. The wvSelector iPart has many configurable features. These instructions explore only the basics. For more detailed help on additional configuration options, click the help icon on the configuration page.

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	Auto Assign	Selected iMIS ID

Fields	Description	Value
"This section" heading		
Name	Unique Identifier of the part on the display page	Example: ActivitySelectorWV Example: AwardSelector
Section Title	Title of the wvSelector iPart. May optionally include the name of the currently selected person or organization by including {0} within the text.	Activities for {0}
Instructions	Instructions are displayed below the title. The instructions should impart information to users on what they need to do or what they can expect to find in this section.	
PageCode for this page (if child of another selector):	Not used with wvActivity	(NONE)
Lock with parent page (if child of another selector):	Not used with wvActivity	Unselected
"Detail page" heading		
Target URL for detail of found records:	Page that will be navigated to on select or create new. Use the path and filename of the Detail page you chose earlier.	~/MBRRAustin/wvActivity/ActivityDetails.aspx
Child Page Type:	Type of Child page	Activity
Include ID on URL		Selected
"Creating new items" heading		
Allow "Create New" Button:	When checked, a new item can be created in the target page.	Selected
Allow user to choose selector value on "Create New":	Not used with wvActivity	Unselected
Create New button tooltip:	Tooltip for create new button when hovering over it	
Log changes	Not used with wvActivity	Unselected
Maximum unclosed items	Not used with wvActivity	
Maximum unsubmitted items	Not used with wvActivity	

Message when maximum...prevents create new	Not used with wvActivity	
"IQA Query" heading		
IQA Query:	The path to the query. Use the example query or one you have created.	Click Select, then navigate to your query. For example, \$/RSMCustomizations/iParts/SelectorPage/Activity Selector
IQA Query settings	wvSelector is able to provide special values to the parameters of your query, but has specific requirements of the query. <ul style="list-style-type: none"> d. Selector queries should always include a Required filter on an ID field. e. The first column of output from the query must be the SEQN field from the Activity. This will allow the detail page to show the correct activity. f. The second column of output from the query must always include text. The link to the detail page will be applied to this column g. If the ACCESS_KEYWORDS field from the activity definition is included in the Display of the query, users will only be able to access an Activity if they have the necessary access keyword. 	
IQA Query settings :Display Type		select Auto Assign
IQA Query settings :Value		Selected iMIS ID (user can edit) Logged In iMIS ID (public facing website)

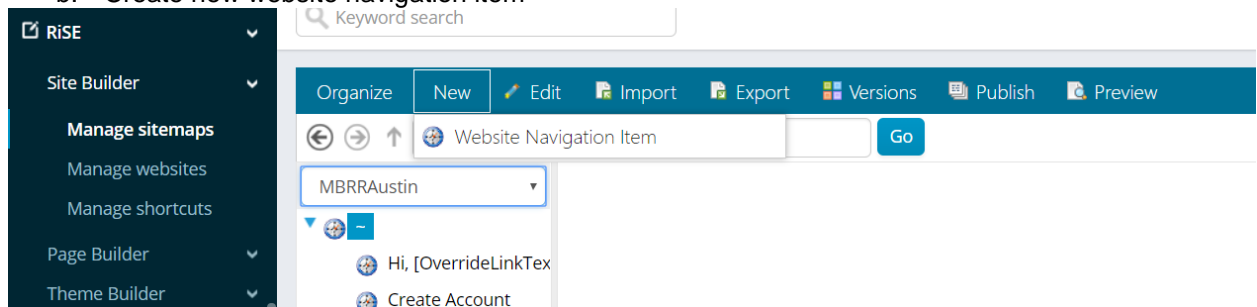
3. Finish the content

- a. If you wish, you may want to add an HTML Content iPart to the page to provide additional instructions.
- b. When you are finished with your changes, click Save and Publish.

Showing wvActivity on your website

6. Add a navigation item to display the Activity selection information.

- a. Go to RiSE -> Site Builder -> Manage sitemaps
- b. Create new website navigation item



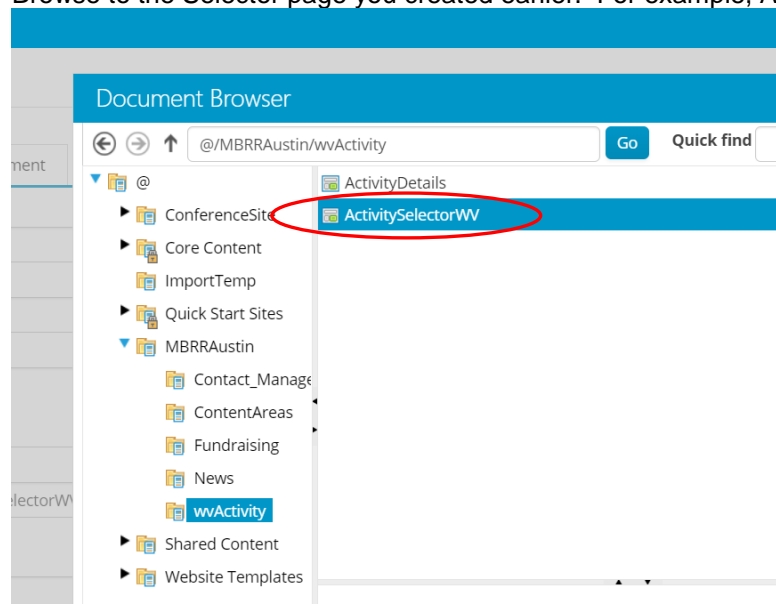
Manage sitemaps

Status: Active (Working)

Properties	Workflow management	Options	Access settings
Navigation link text			
<input type="text" value="Activities"/>			
Navigation folder name			
<input type="text" value="wwActivities"/>			
Tool tip description			
<input type="text"/>			
Content or URL to link to			
<input type="text" value="@/MBRRAustin/wwActivity/ActivitySelectorWV"/> select			
URL parameters			
<input type="text"/>			
Breadcrumb name			
<input type="text" value="Activities"/>			
<input type="checkbox"/> Hide on this page			

c. **Content or URL to Link to**

- Click select
- Browse to the Selector page you created earlier. For example, ActivitySelector.



- Click Save
- In the left navigation area, move the navigation item to your chosen location by dragging and dropping.
- Click Publish. iMIS always publishes the entire sitemap.

Finished Activity Example Screenshots:

Activities for Alex Morgan, Versaton US

Create New

Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units	Description
AWARD	AWARD	11/21/2017 12:00:00 AM	Best Award!			0.0000	0.00	Award

Edit current activity:

Type	AWARD
Date	11/21/2017
Service Date	11/1/2017
Code	AWARD
Description	Best Award!

Save

Cancel

Delete

Create new:

Activity

Type	
Date	

- APPOINTMNT
- AWARD
- CEU
- COMPLAINT
- LETTER
- MONTHLYLOG
- ORDER
- RESIGN
- SPEAKER
- VOLUNTEER

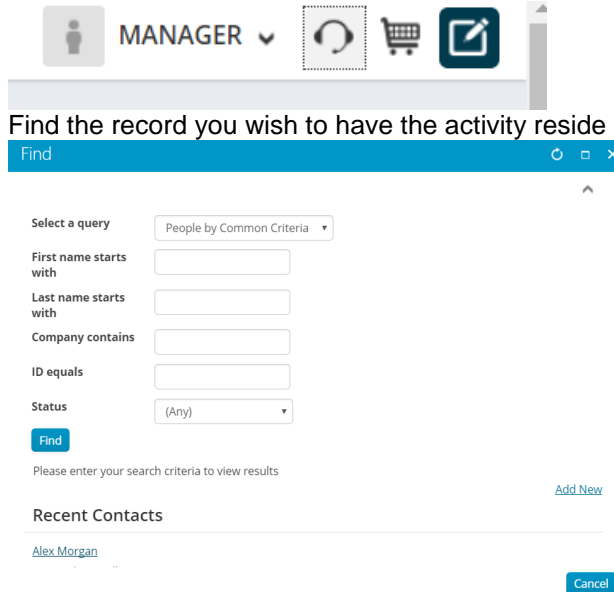
wvActivity – Create New Activity from the staff site

**please note, this same concept can be applied to the public facing site. The first step will not have to be completed for the public site. Instead, when on the public site, the user will be entering information for themselves.

The following are steps to create a new Activity using the wvActivity iPart.

1. **If you are a staff member you can choose record on which the activity is to reside. To do this, you will want to select that record to act on Behalf of.**

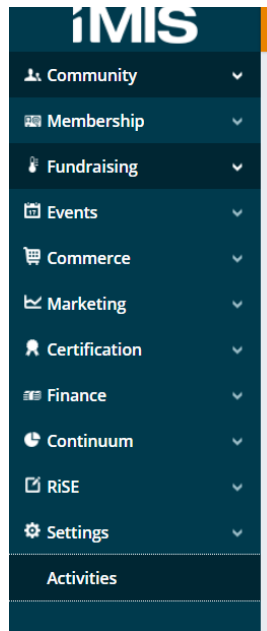
- a. From the staff site, click the head set icon



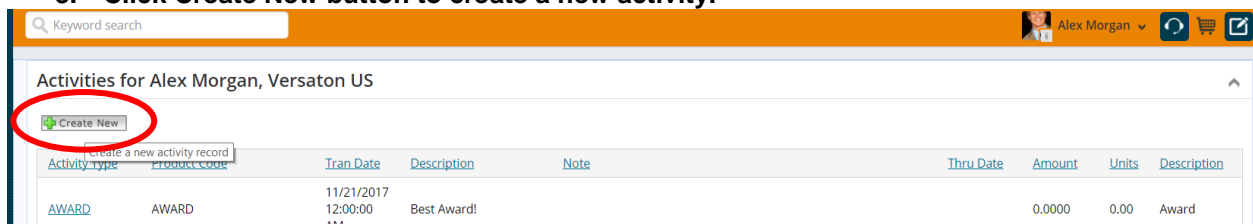
The screenshot shows the top navigation bar of a staff site. It includes a user profile icon, the text 'MANAGER' with a dropdown arrow, and several icons: a headset (highlighted with a dashed box), a shopping cart, and a document with a pencil. Below the navigation bar, a 'Find' search window is open. The window has a title bar with 'Find' and standard window controls. Inside, there is a 'Select a query' dropdown set to 'People by Common Criteria'. Below this are five search criteria fields: 'First name starts with', 'Last name starts with', 'Company contains', 'ID equals', and 'Status' (set to '(Any)'). A blue 'Find' button is at the bottom left of the search criteria. Below the button, it says 'Please enter your search criteria to view results'. On the right side of the window, there is a blue 'Add New' link. At the bottom of the window, there is a 'Recent Contacts' section with a link to 'Alex Morgan'. A blue 'Cancel' button is at the bottom right of the window.

- c. Proceed normally to obtain desired record. (See standard iMIS documentation on how to use on behalf of.)

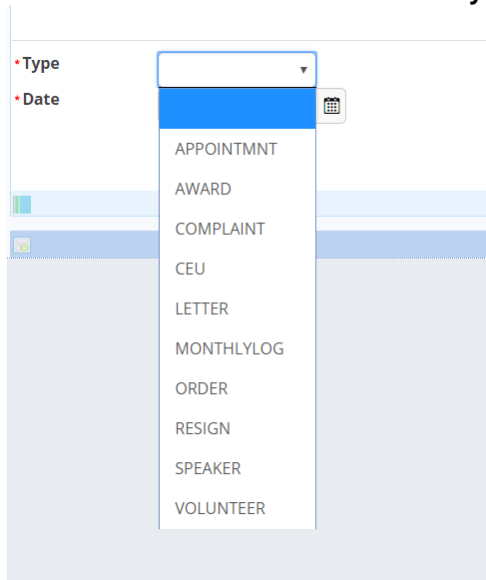
2. **Choose the wvActivity link from the navigation that you created.**





3. Click Create New button to create a new activity.



4. Choose the type of activity to create. Enter the date for the activity. This date will appear as the transaction date on the activity.



5. Complete the fields listed for the activity chosen. Click Save.

Type	AWARD	
Date	11/21/2017	
Service Date	8/1/2017	
Code		
Description		

[Save](#) [Cancel](#) [Delete](#)

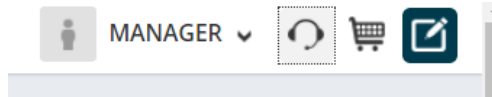
wvActivity – Edit Activity from the staff site

**please note, this same concept can be applied to the public facing site. The first step will not have to be completed for the public site. Instead, when on the public site, the user will be entering information for themselves.

The following are steps to edit an existing Activity using the wvActivity iPart.

1. **If you are a staff member you can choose record on which the activity is to reside. To do this, you will want to select that record to act on Behalf of.**

- a. From the staff site, click the head set icon

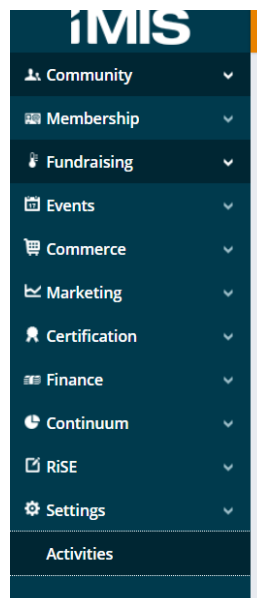


- b. Find the record you wish to have the activity reside on.

A screenshot of the 'Find' search window in iMIS. The window has a blue header with the title 'Find' and standard window controls. Below the header, there is a section titled 'Select a query' with a dropdown menu set to 'People by Common Criteria'. This is followed by several search criteria fields: 'First name starts with', 'Last name starts with', 'Company contains', 'ID equals', and 'Status' (with a dropdown set to '(Any)'). A blue 'Find' button is located below these fields. Below the search fields, there is a message 'Please enter your search criteria to view results' and a link 'Add New'. At the bottom, there is a section titled 'Recent Contacts' with a link 'Alex Morgan'. A 'Cancel' button is located at the bottom right of the window.

- c. Proceed normally to obtain desired record. (See standard iMIS documentation on how to use on behalf of.)

2. **Choose the wvActivity link from the navigation. (In this example, it is called Activities. Your website may have a slightly different link name and be in a different position on the navigation.)**



3. Click the link in the Activity Type column of the activity to edit.

Activities for Alex Morgan, Versaton US

[Create New](#)

Activity Type	Product Code	Tran Date	Description	Note	Thru Date	Amount	Units	Description
AWARD	AWARD	11/21/2017 12:00:00 AM	Best Award!			0.0000	0.00	Award
GIFT	MARSH	4/6/2017 12:00:00 AM	Help to restore marshlands and fresh water habitats			500.0000	0.00	Gift Activity

4. Make review or make changes to the activity selected. Click OK to save; Cancel to not save changes; Delete to remove activity. (The delete function follows the setting in iMIS Desktop.)

*Type	AWARD
*Date	11/21/2017
Service Date	11/1/2017
Code	AWARD
Description	Best Award!