

# *User Manual*

## *wvMultiInstance for iMIS*

**By:**



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# ***wvMultiInstance*** **User Manual**

## **Version 1.0**

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

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## wvMultilInstance - Configuration

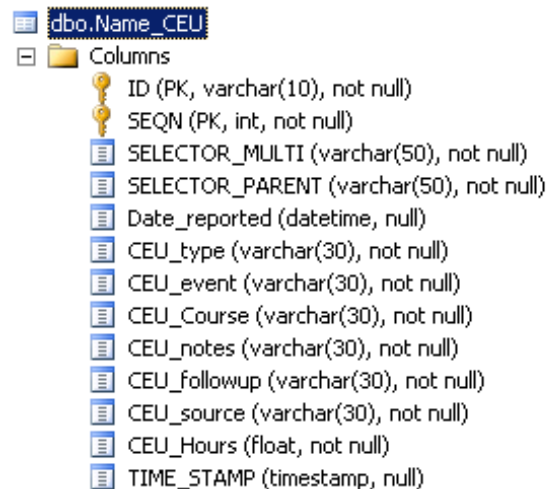
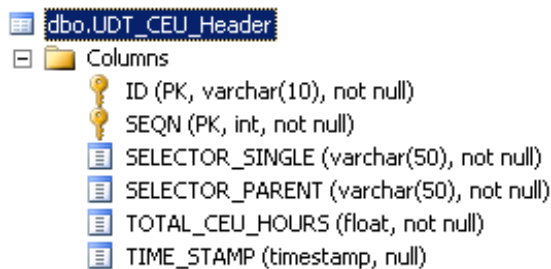
The following are steps to configure the wvMultilInstance iPart. Installation of wvSuite is required before proceeding. If the installation of wvSuite has not yet been performed, instructions for the installation are found in the wvSuite Installation manual.

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.

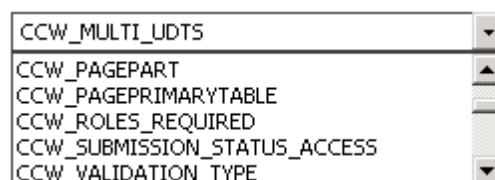
(See the Customer reference manual from ASI for instructions on how to do this.)

*\*Each table requires SELECTOR\_SINGLE(Char 50) and SELECTOR\_PARENT(Char 50)*



### 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.



- a. **Add all User Defined Tables (UDT) which will be used in the MultilInstance 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

The screenshot shows a software interface with a menu bar (New, Open, Edit, Delete) and a list of tables. The table 'CCW\_MULTI\_UDTS' is highlighted in the list. To the right, there are input fields for 'Code', 'Expansion', and 'Description', all containing the text 'UDT\_CEU\_Header'.

Table Name	Code	Expansion	Description
CCW_MULTI_UDTS	UDT_CEU_Header		UDT_CEU_Header

- b. **Add pageparts to the CCW\_PAGEPART.**

Each panel that contains fields from a MultilInstance 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

The screenshot shows the same software interface as above, but with the table 'CCW\_PAGEPART' selected in the list. The input fields for 'Code', 'Expansion', and 'Description' still contain the text 'UDT\_CEU\_Header'.

Table Name	Code	Expansion	Description
CCW_PAGEPART	UDT_CEU_Header		UDT_CEU_Header

**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**

CCW_PAGEPRIMARYTABLE	
CEU	UDT_CEU_Header
EX	UDT_EXAMPLE
SVY	UDT_SURVEY_SUMMARY

Code	UDT_CEU_Header
Expansion	
Description	UDT_CEU_Header

**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**

CCW_ROLES_REQUIRED	
NOBODY	(Keyword for securat
PRIVILEGED	(Users who can edit

Code	
Expansion	
Description	Blank

**e. Modify/add values to CCW\_SUBMISSION\_STATUS\_ACCESS.**

vvMultInstance 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		
10PENDING	Edit	(Edit)
20READY	view	(Edit)
90CLOSED	view	(View)

Code   
Expansion   
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)		
FIND_ID	(Find ID)	
GENTABLE	(General Lookup Tabl	
SQLFUNCTION	(calculated (SQL))	

Code   
Expansion   
Description Blank

### 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.



[Home](#)
[Contacts](#)
[Events](#)
[Store](#)
[Marketing](#)
[Process Mgr](#)
[Education](#)
[Communities](#)
[System Setup](#)

**System Setup**

- 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**

**System Setup > RSM McGladrey 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	SQLFUNCTION		False		
	UDT_SURVE	EMPLOYEE_SVY.CENSUS	Total			2	fr_CCWCal	SQLFUNCTION		False		
	UDT_SURVE	EMPLOYEE_SVY.CENSUS	Total			3	fr_CCWCal	SQLFUNCTION		False		
	UDT_SURVE	EMPLOYEE_SVY.CENSUS	Total			4	fr_CCWCal	SQLFUNCTION		False		
	UDT_SURVE	EMPLOYEE_SVY.CENSUS	Total			5	fr_CCWCal	SQLFUNCTION		False		
	UDT_SURVE	EMPLOYEE_SVY.CENSUS	Total			6	fr_CCWCal	SQLFUNCTION		False		
	UDT_SURVE	CR_CARPEN	SVY.CENSUS	Carpenters		1				False	<B> 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_PAINTER	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.

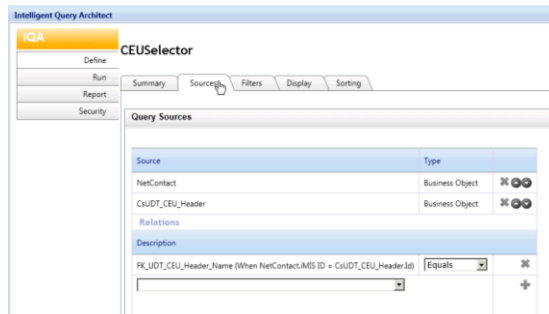
Field Name	Description	Value (The values listed here are for this example – you will choose the table that is the correct one for your configuration)
DEMOG_TABLE_NAME	Name of the MultiInstance table where the field is located.	Name_CEU
FIELD_NAME	The exact SQL name of the field. If this is typed incorrectly, 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>iMIS</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. <sup>1</sup> 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. <sup>1</sup> 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. <sup>1</sup> 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. <sup>1</sup> 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.	

<sup>1</sup> 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.

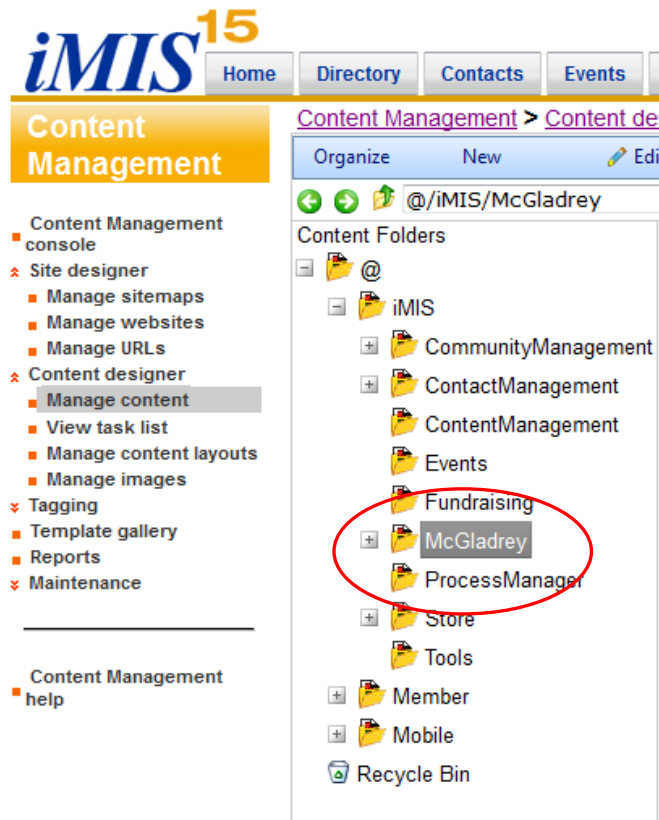
## 5. Create an IQA query for the selector page

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.



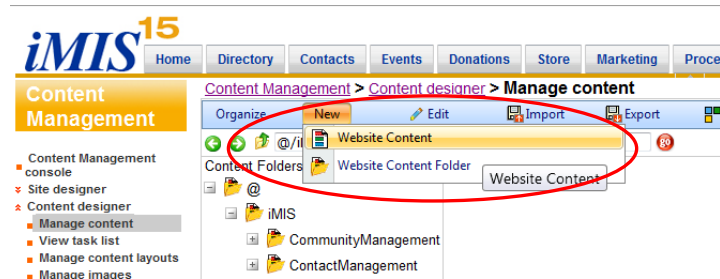
## 6. Create a place for the content

- 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

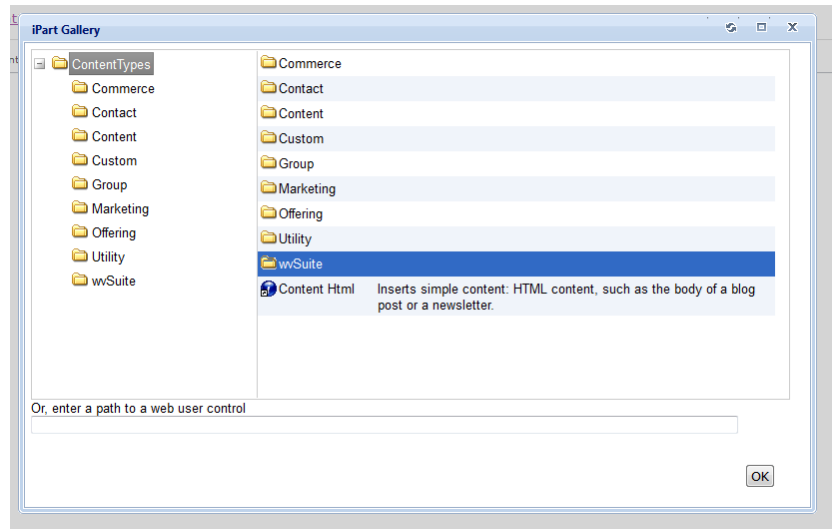
- a. Choose New
- b. Choose Website Content



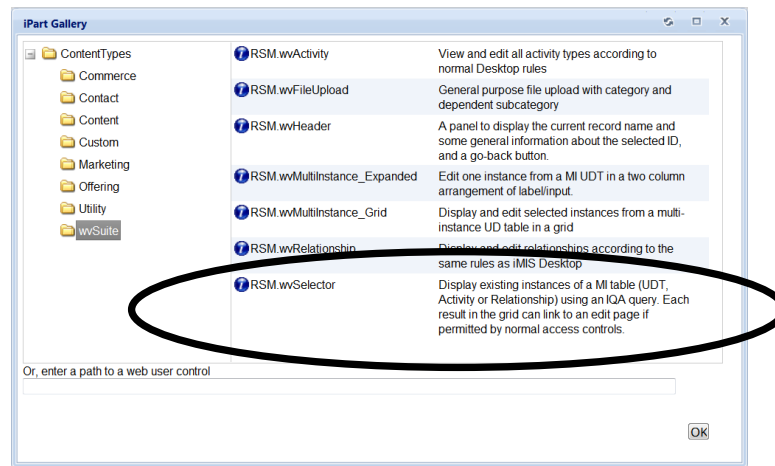
- c. Title the new content CEUSelector

A screenshot of the 'Content Designer' form. At the top, it says 'Status: Published'. Below this are four tabs: 'Definition', 'Properties', 'Current Tags', and 'Access Settings'. The 'Definition' tab is active. It contains four fields: 'Title' with the value 'CEUSelector', 'Publish File Name' with the value 'CEUSelector', 'Content Layout' with a dropdown menu set to 'SingleColumn', and 'Publish Location' with the URL '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

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:

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

**IQA Query settings.**

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

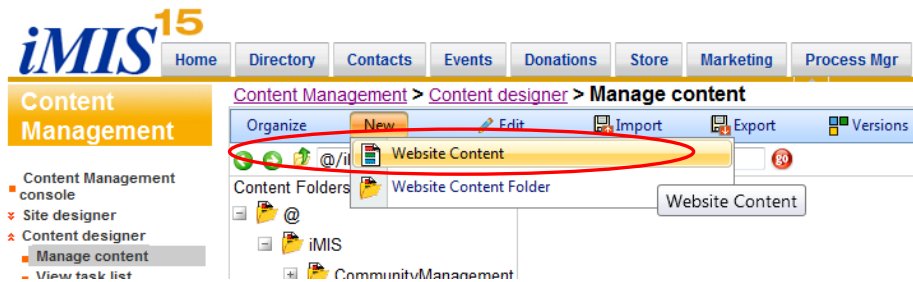
Filtering by column

### Values for fields:

Field	Description	Value
Name	Unique Identifier of the part on the display page	CEUSelector
Section Title	Title on the page followed by selected name	Selector Periods
Instructions	Instructions are displayed below the title	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:	Page that will be navigated to on select or create new	~/iMIS/McGladrey/CEUDetail.aspx
Child Page Type:	Type of Child page	Page: CEU
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:	Tooltip for create new button when hovering over it	
IQA Query:	Please select the IQA created in Step 3	\$/RSMCustomizations/iParts/SelectorPage/CEUSelector
IQA Query settings	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	
Display Type		Select Auto Assign
Value		Selected iMIS ID

## 9. Create the CEU (MultInstance) Detail page

- a. Choose New
- b. Choose Website Content



- c. Title the new content MultInstanceDetails

**Content Designer**

Status: Published

Definition Properties Current Tags Access Settings

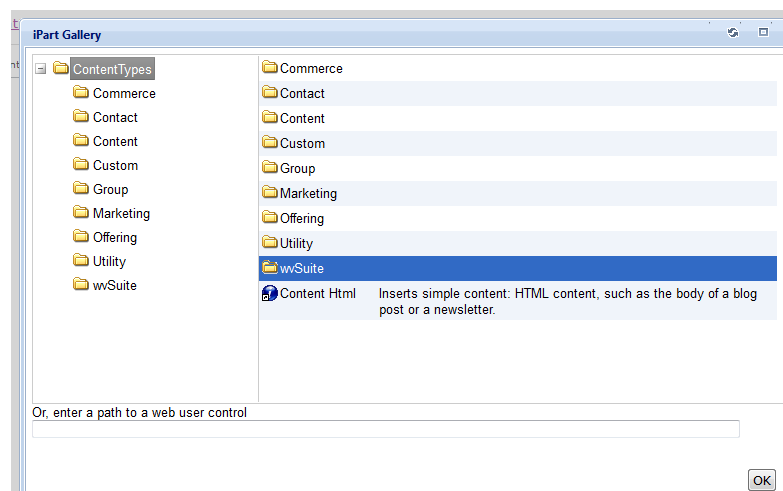
\*Title

\*Publish File Name

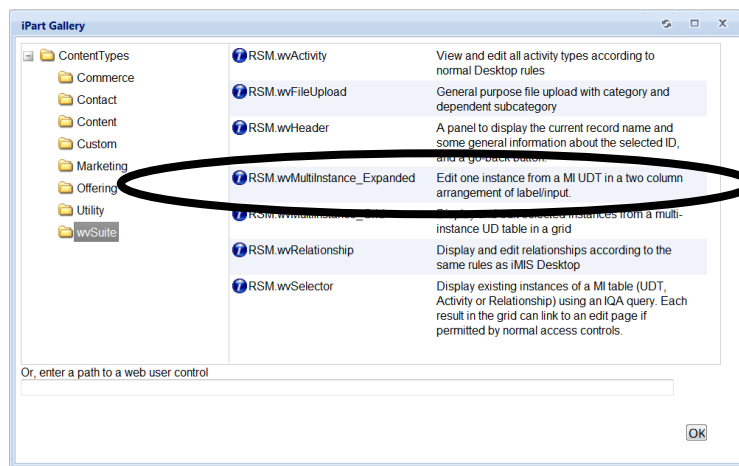
Content Layout

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:**

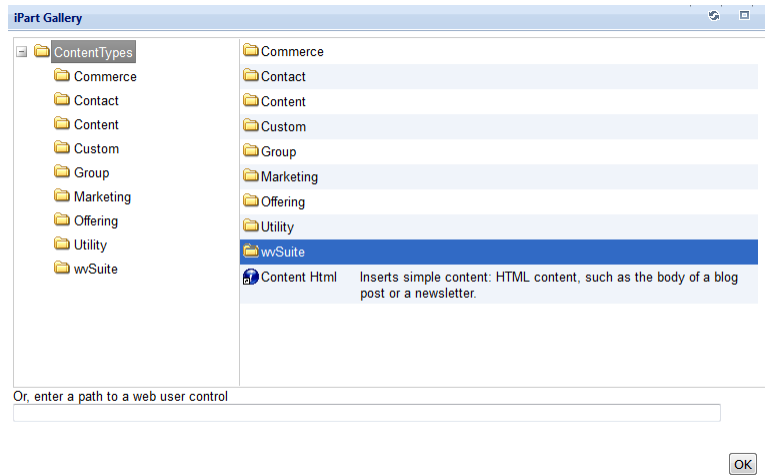
---

wvSuite version 1.0.6575.1090  
 RSMSQLCLR version 1.0.6531.1000  
 Common version 1.0.6528.1000

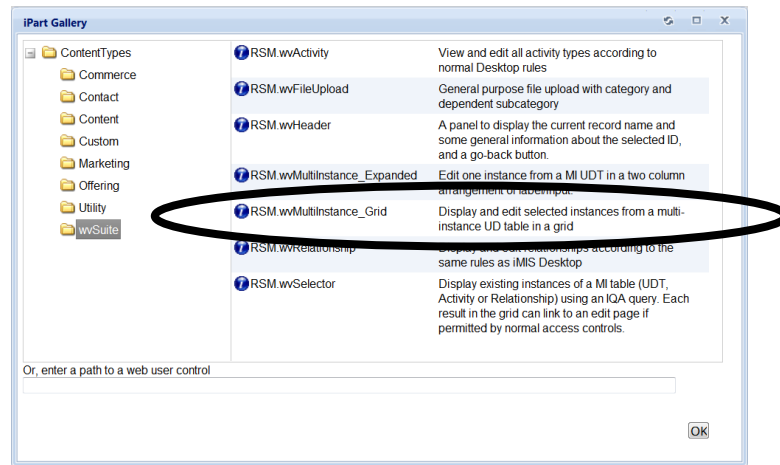
Field Values	Value
Name	CEUHeader
PagePart to display	CEU.HEADER
Section Title	CEU Period



- 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:**

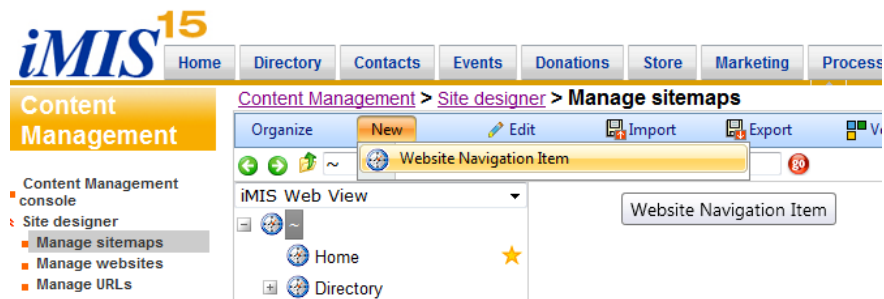
**Simple Mode:** ☐

wvSuite 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

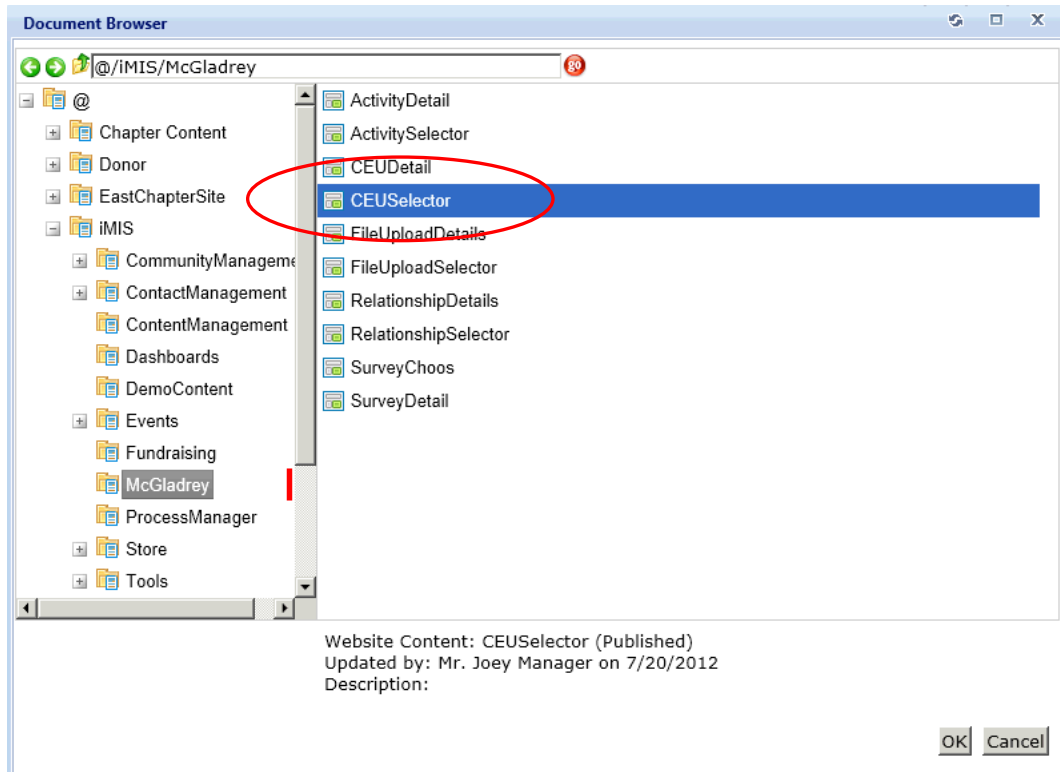


Status: Published

Properties	Workflow Management	Options	Access Settings
* Navigation Link Text	<input type="text" value="CEUs"/>		
* Navigation Folder Name	<input type="text" value="CEUs"/>		
Tool Tip Description	<div><input type="text"/></div> <div></div>		
Content or URL to Link to	<div><input type="text" value="@/iMIS/McGladrey/CEUs"/> <a href="#">select</a> </div> <div>Or select a standard page:</div> <div><input type="text" value="(None)"/> </div>		
URL Parameters	<input type="text"/>		
Breadcrumb Name	<div><input type="text" value="CEUs"/> </div> <div><input type="checkbox"/> Hide on this page</div>		
Override Content Title	<input type="text"/> 		
Navigation Code	<input type="text"/> 		
Image URL	<input type="text"/> <a href="#">select</a>		
CSS Class	<input type="text"/>		
Folder containing template gallery content			
<input checked="" type="checkbox"/> Inherit from parent			
<input type="text"/>			



- 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:

The screenshot shows the iMIS 15 interface. The top navigation bar includes links for Home, Contacts, Events, Store, Marketing, Process Mgr, Education, Communities, and System Set. The left sidebar lists various functions like Find contact, Create account, Contact management, Query Tool, Dashboards - Overview, Email Marketing, Register for event, Make a purchase, Contacts help, Credits, Collateral Materials, Activities, Relationships, Survey, and CEUs. The main content area is titled "Contacts > CEUs" and "Selector Periods Christopher Baker, Opus, Inc.". It contains a text box explaining that users should choose a period to enter CEUs and a "Create New" button with a "New Period:" input field. Below this is a table showing the data returned by the selector query.

Period	Total Hours
2008	5
2009	4

Annotations on the page:

- "Data returned by the Selector Query" points to the table.
- "Link to advance to Details page" points to the "2009" link in the table.

CEU Details Page:

The screenshot shows the iMIS 15 interface for the CEU Details page. The top navigation bar includes links for Home, Contacts, Events, Store, Marketing, Process Mgr, Education, Communities, System Setup, Tools, and Content Management. The left sidebar lists various functions like Find contact, Create account, Contact management, Query Tool, Dashboards - Overview, Email Marketing, Register for event, Make a purchase, Contacts help, Credits, Collateral Materials, Activities, Relationships, Survey, and CEUs. The main content area is titled "Contacts > CEUs" and "CEU Period". It contains a form for "CEU Year" (2008) and "Total CEU" (5), with a "Save Section" button. Below this is a "CEU Detail" table with columns for Date Reporting, Type of CEU, Event where CEU earned, Name of the course, Notes about CEU, Staff followup about, Method CEU received, and Number of hours. The table contains two rows of data. Annotations on the page:

- "Link to add a new record" points to the "Add new record" link above the table.
- "Edit or delete icon" points to the edit and delete icons in the first row of the table.

Expanded CEU Details Page to enter or update data:

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

---






**CEU Period**

CEU Year	<input type="text" value="2008"/>
Total CEU	5

---

**CEU Detail**

[+ Add new record](#)

	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
<div><div><div>Date Reporting:</div><div><input type="text" value="8/14/2008"/> </div></div><div><div>Type of CEU:</div><div><input type="text" value="CONT"/></div></div><div><div>Event where CEU earned:</div><div><input type="text" value="COM"/></div></div><div><div>Name of the course:</div><div><input type="text" value="Board Meeting"/></div></div><div><div>Notes about CEU:</div><div><input type="text"/></div></div><div><div>Staff followup about CEU:</div><div><input type="text"/></div></div><div><div>Method CEU received:</div><div><input type="text" value="INTERNAL"/></div></div><div><div>Number of hours:</div><div><input type="text" value="2"/></div></div></div> <div><a href="#">Update</a> <a href="#">Cancel</a></div>								
 	2012-02-23T00:00:00	Business	conference	Course 101				3