

User Manual

wvFileUpload for iMIS



1 S. Wacker Dr.
Suite 800
Chicago, IL 60606
<http://rsmus.com/imis>

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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RSM US LLP
1 S. Wacker Drive
Suite 800
Chicago, IL 60606

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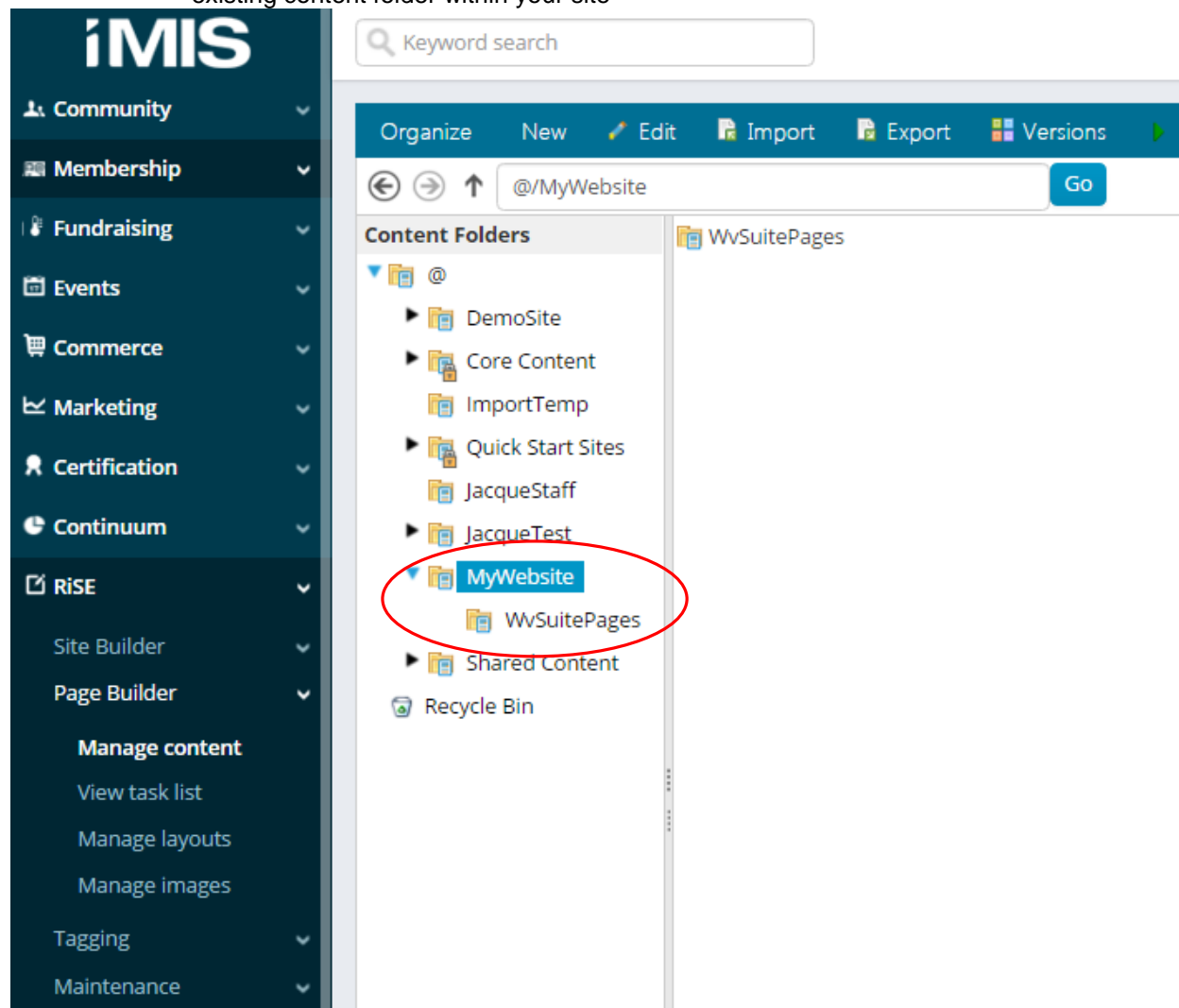
wvFileUpload

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

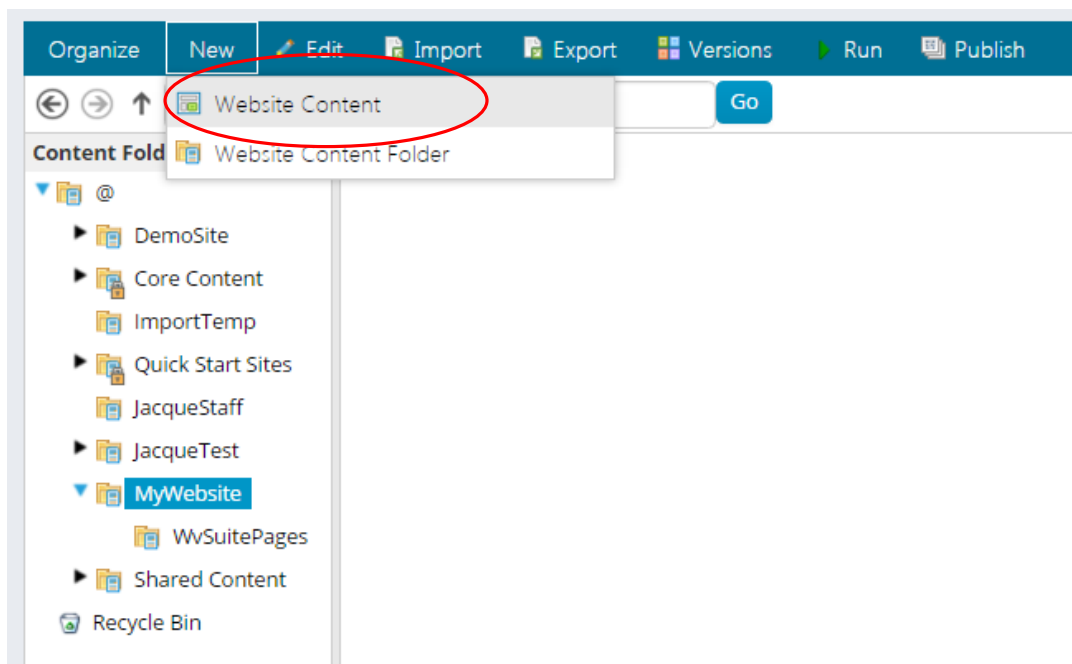
1. Create a place for the content

- 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



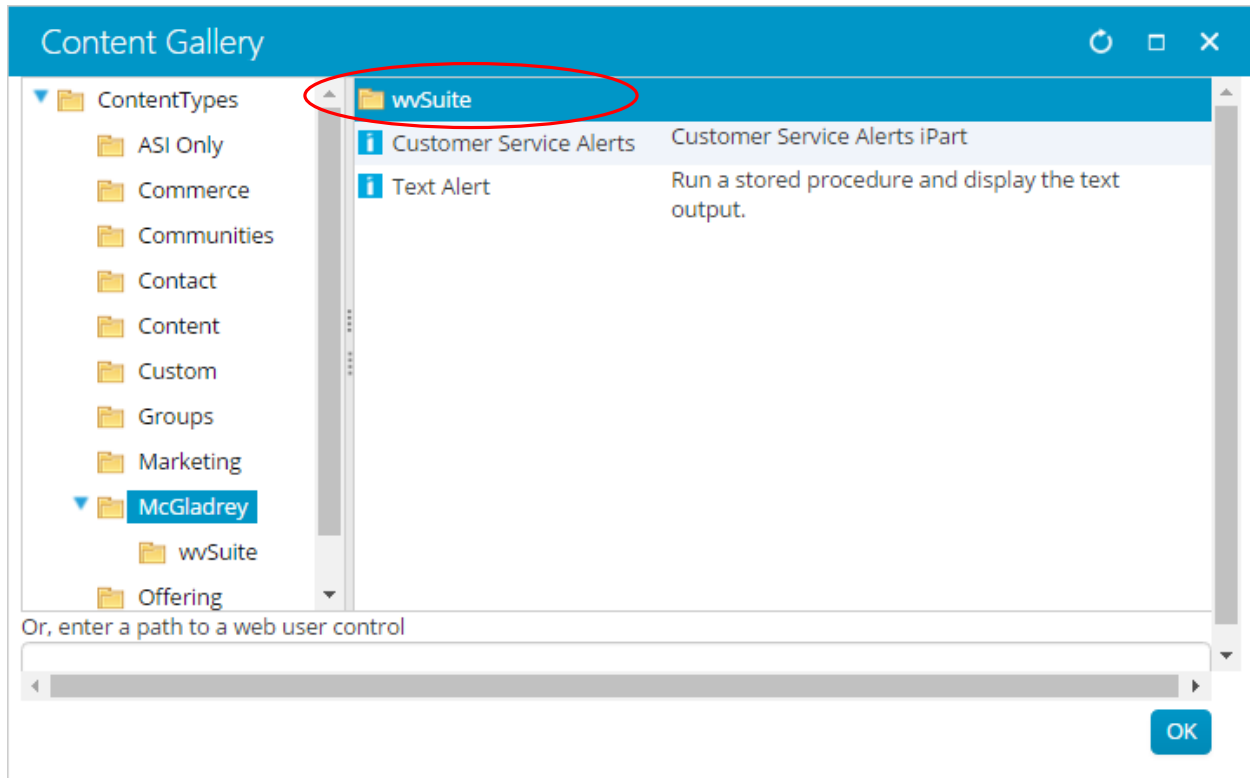
c. Title the new content FileUploadChoose

Manage content

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

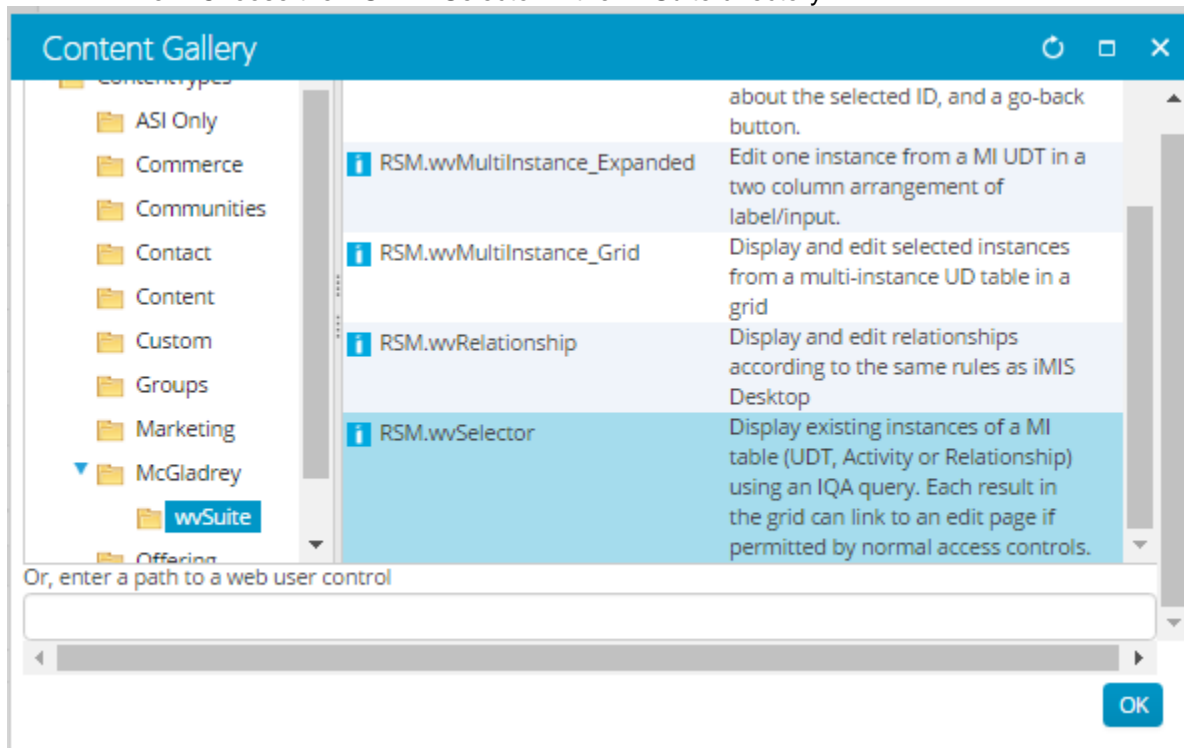
Definition	Properties	Current tags	Access settings
<h3>FileUploadChoose</h3> <p>• Title <input type="text" value="FileUploadChoose"/> <input checked="" type="checkbox"/> Use dynamic page title</p> <p>• Publish file name <input type="text" value="FileUploadChoose"/></p> <p>Layout <input type="text" value="SingleColumn"/> </p> <p>Publish location <input type="text" value="http://localhost/iMISClean/JacqueTest/Contacts/ContactLayouts/FileUploadChoose.aspx"/> Click appropriate button to generate a full URL or free link to copy elsewhere.</p> <p><input type="button" value="Generate Full URL"/> <input type="button" value="Generate Freelink"/></p> <p><input type="checkbox"/> Create navigation on publish</p> <p>Add content Edit zone properties</p> <p>To add content, click the "add content" link above.</p>			

d. Click add content and select the wwSuite folder



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e. Choose the RSM.wvSelector in the wvSuite directory



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Configure iPart - RSM.wvSelector

Name

FileUploadChoose

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

Uploaded Files for (0)

Instructions

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

(None)

☐ Lock with parent page

Detail page

Target URL for detail of found records

~/JacqueTest/Contacts/

Child page type

FileUpload

☐ 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:

\$/RSMCustomizations/

select

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

IQA Query settings.

#

Display Name

IMIS Id Equals

Display Type

Auto Assign

Value

Selected IMIS ID

Filtering by column

Navigation by Column

Formatting Options

WVSuite version 1.0.10000.1000

MSIAdmPyLibrary version 1.0.10000.1000

MSISQLLib version 1.0.10000.1000

OK

Cancel

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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

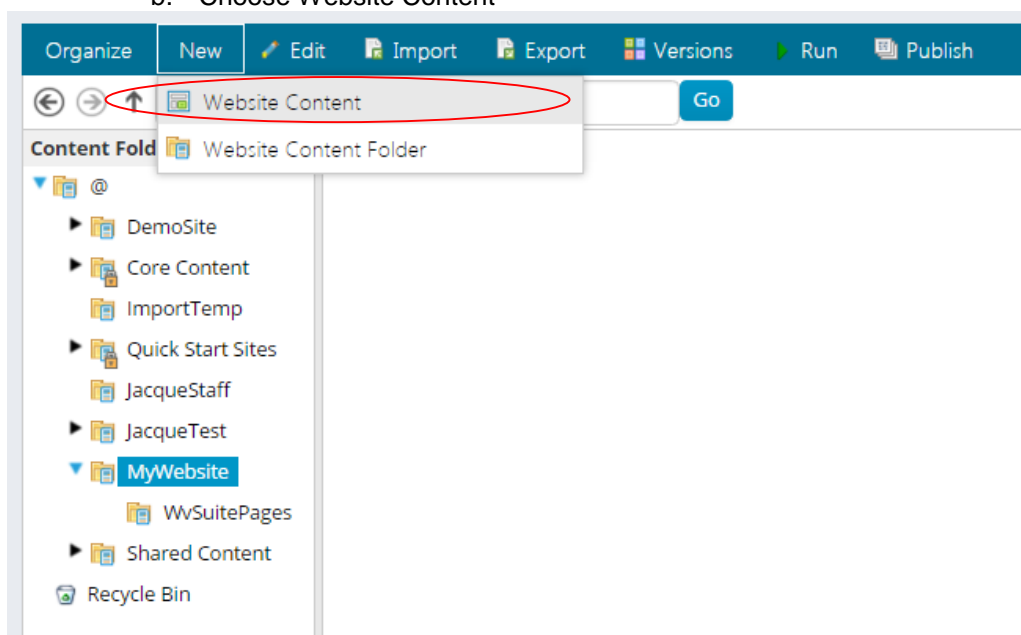
Click of the links in order to see the uploaded file. Otherwise click create new.

[+ Create New](#)

Date Uploaded	Category	Attachment Type	Effective Year	Description	Uploaded File	Date Uploaded
5/9/2016 12:00:00 AM	CERT	CERT.OTHER	2016	Resume	XYZ test resume.docx	05/09/2016
5/9/2016 12:00:00 AM	CERT	CERT.OTHER	2013		XYZ test resume.docx	05/09/2016
5/3/2016 12:00:00 AM	CERT	CERT.OTHER	2017	Resume	XYZ test resume.docx	05/03/2016
5/3/2016 12:00:00 AM	CERT	CERT.OTHER	2016	Resume	XYZ test resume.docx	05/03/2016

5. Create the File Upload Detail page

- Choose New
- Choose Website Content



The screenshot shows the File Upload interface. The 'New' button is highlighted in the top bar. A dropdown menu is open, showing 'Website Content' as the selected option. The 'Content Fold' section on the left lists various content folders, including 'DemoSite', 'Core Content', 'ImportTemp', 'Quick Start Sites', 'JacqueStaff', 'JacqueTest', 'MyWebsite', 'WvSuitePages', 'Shared Content', and 'Recycle Bin'.

c. Title the new content FileUploadDetails

Content Designer

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Status: (Published)

Definition
Properties
Current tags
Access settings

FileUploadDetails

• **Title** ☒ Use dynamic page title

• **Publish file name**

Layout SingleColumn

Publish location <http://localhost/iMISClean/JacqueTest/Contacts/ContactLayouts/FileUploadDetails.aspx>
 Click appropriate button to generate a full URL or free link to copy elsewhere.

Generate Full URL
Generate Freelink

[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
 - ASI Only
 - Commerce
 - Communities
 - Contact
 - Content
 - Custom
 - Groups
 - Marketing
 - ▼ McGladrey
 - wvSuite
 - Offering

wvSuite

	Customer Service Alerts	Customer Service Alerts iPart
	Text Alert	Run a stored procedure and display the text output.

Or, enter a path to a web user control

OK

e. Choose the RSM.wvFileUpload in the wvSuite directory

6. Configure RSM.wvFileUpload

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Configure iPart - RSM.wvFileUpload

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):

☒ ☒ ☒ ☒ ☒ ☒

wvFileUpload configuration

Activity Type

URL to return to

PageCode of the parent page

☒ Include ID on URL

☐ Log changes

Allowed upload roles

- Everyone
- OnBehalfOf
- Privileged
- SysAdmin

Allowed delete roles

- Content Administrator
- Everyone
- OnBehalfOf
- Privileged
- SysAdmin

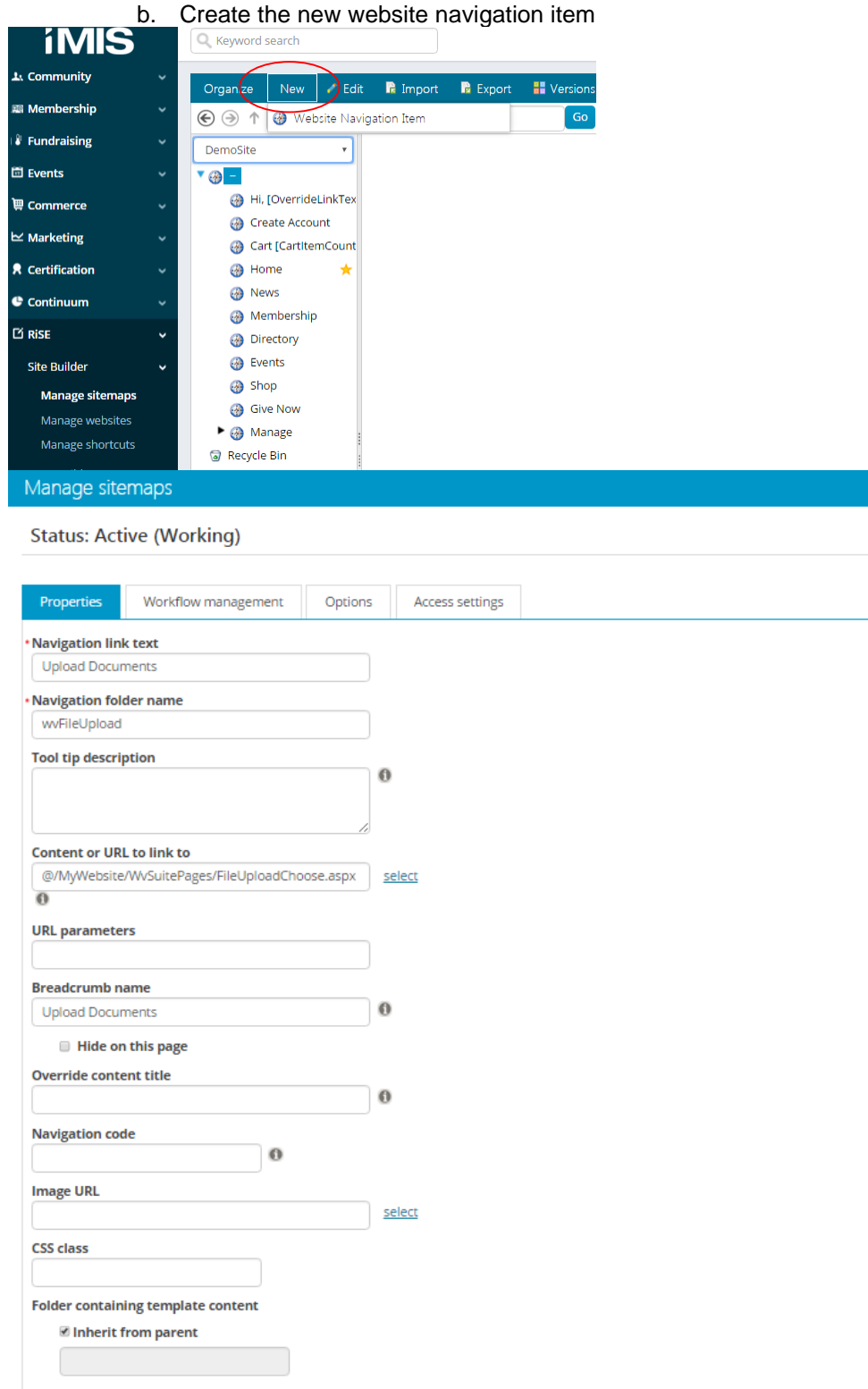
wvSuite version 1.0.10689.1000
McGladrey.Library version 1.0.10674.1000
RSMSQLCLR version 1.0.10686.1000

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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 step 8
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



Manage sitemaps

Status: Active (Working)

Properties | Workflow management | Options | Access settings

• **Navigation link text**

• **Navigation folder name**

Tool tip description

Content or URL to link to
 [select](#)

URL parameters

Breadcrumb name

☐ **Hide on this page**

Override content title

Navigation code

Image URL
 [select](#)

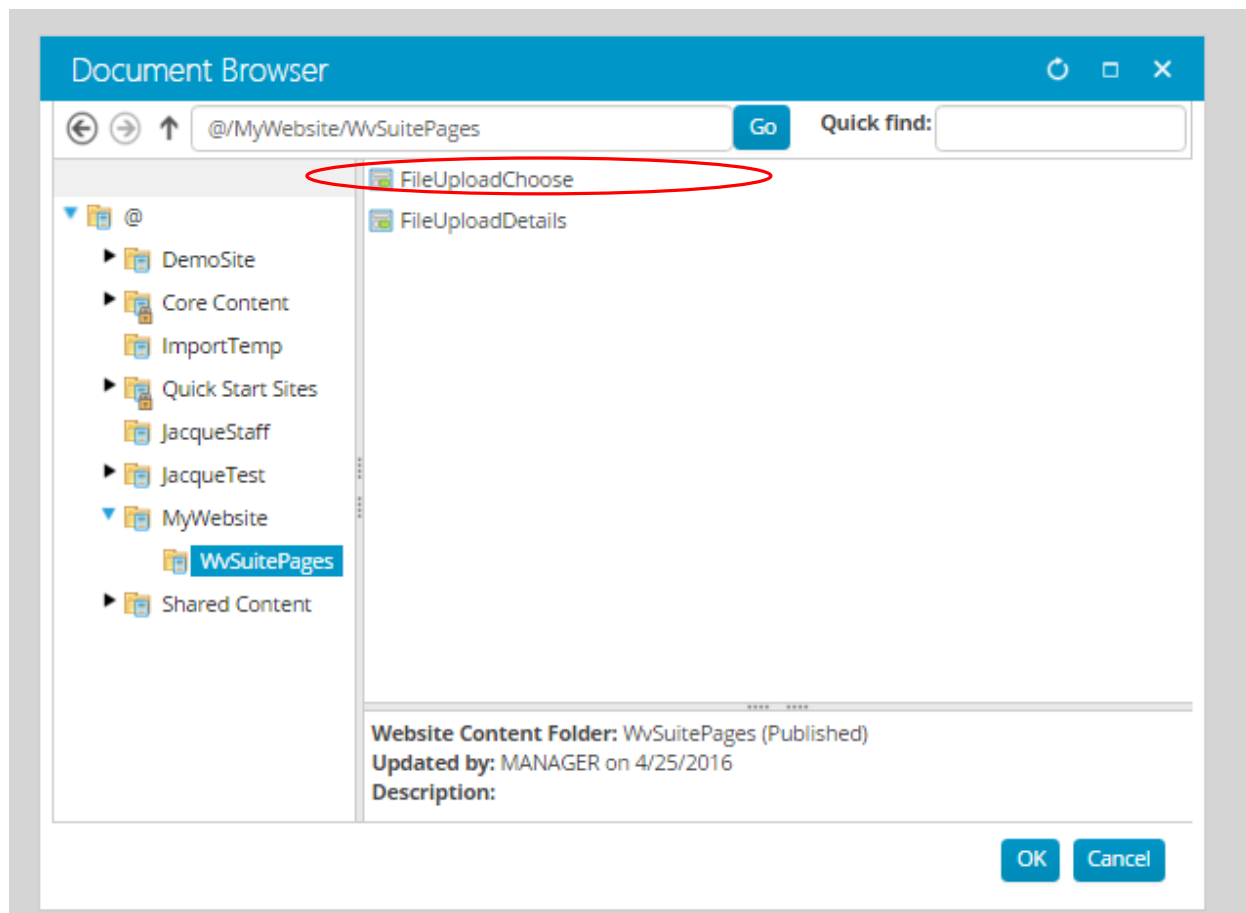
CSS class

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

vvFileUpload configuration

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Activity Type

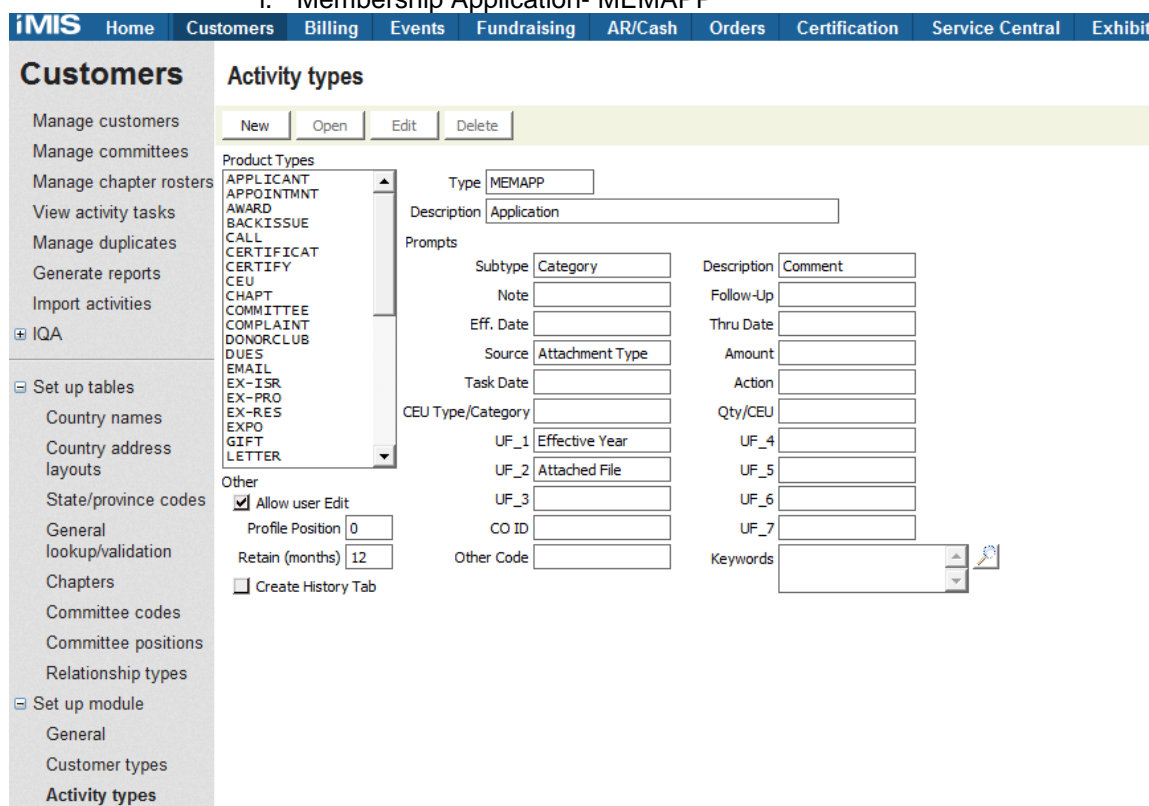
(None)

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)

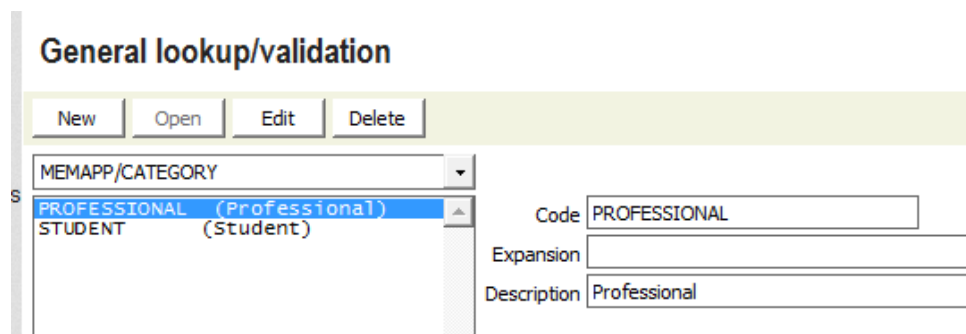
c. Create activity types for each activity

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 shows the Customers menu with options like Manage customers, Manage committees, and Manage chapter rosters. The main area is titled 'Activity types' and contains a 'New' button, a list of Product Types (including APPLICANT, APPOINTMENT, AWARD, BACKISSUE, CALL, CERTIFICATE, CEU, CHART, COMMITTEE, COMPLAINT, DONORCLUB, DUES, EMAIL, EX-ISR, EX-PRO, EX-RES, EXPO, GIFT, LETTER), and a form for configuring the 'MEMAPP' activity type. The form includes fields for Type, Description, Prompts, Subtype, Category, Note, Eff. Date, Source, Task Date, CEU Type/Category, UF_1 Effective Year, UF_2 Attached File, UF_3, CO ID, Other Code, Keywords, and checkboxes for 'Allow user Edit' and 'Create History Tab'.

d. Create general lookup table – Category



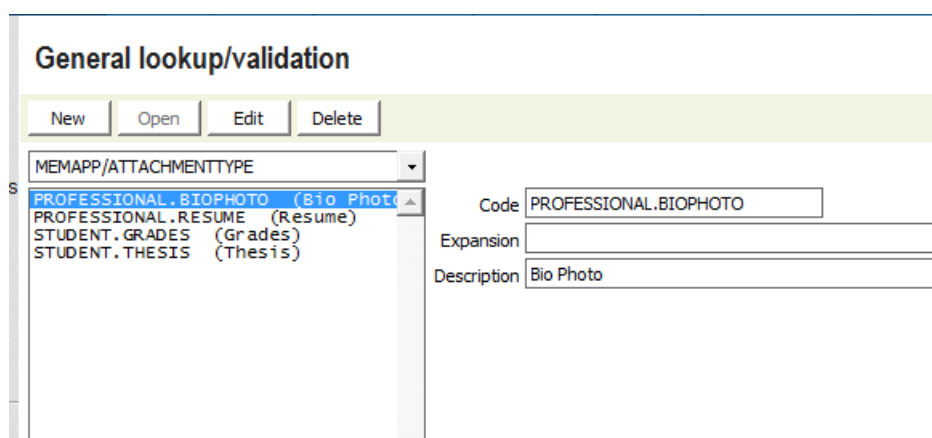
The screenshot shows the 'General lookup/validation' table configuration. The top navigation bar includes New, Open, Edit, and Delete buttons. The table has a dropdown menu for 'MEMAPP/CATEGORY' with a list of categories: PROFESSIONAL (Professional) and STUDENT (Student). The table also includes fields for Code, Expansion, and Description. The 'PROFESSIONAL' category is selected, showing a Code of 'PROFESSIONAL', an empty Expansion field, and a Description of 'Professional'.

i.

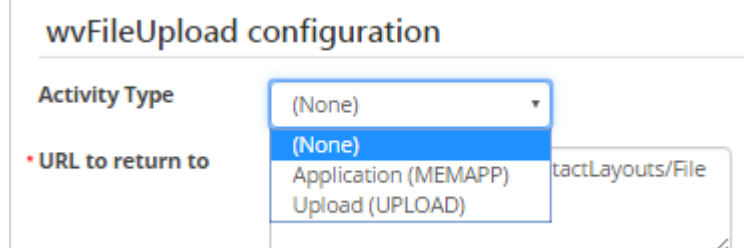
e. Create general lookup table – Attachment Type

- 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

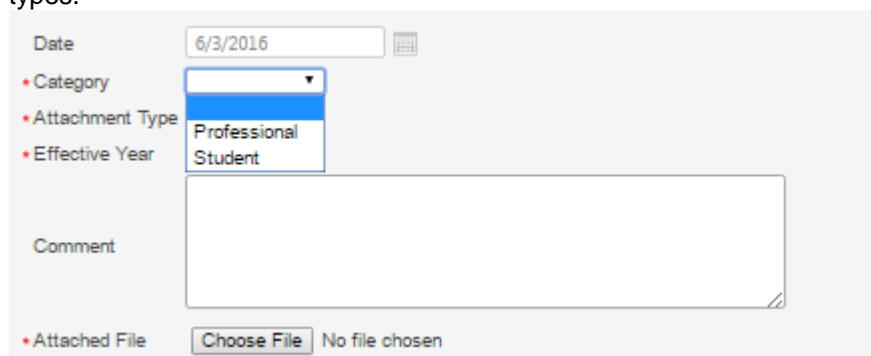
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- iii.
- f. FileUpload iPart configuration will now show your new option (selecting (none)) will cause the iPart not to function correctly. By default you should choose Upload.



- 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.

Date

6/3/2016

• Category

Professional

• Attachment Type

Bio Photo

Resume

• Effective Year

Comment

• Attached File

Choose File

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.wvFileUpload.ExtensionBlacklist)

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

Upload path for wvFileUpload iPart (RSM.wvFileUpload.UploadPath)

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

Upload virtual path for wvFileUpload iPart (RSM.wvFileUpload.UploadVirtualPath)

~/Download/