User Manual
wvRelationships for iMIS

By:

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wvRelationships
User Manual

Version 1.0

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

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Table of Contents

wvRelationships - Configuration

The following are steps to configure the Relationship 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.

1. **Create a place for the content**

    a. Go to Content Management->ContentDesigner->Manage Content
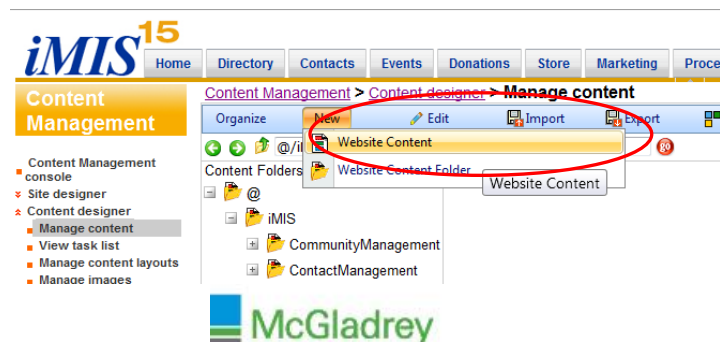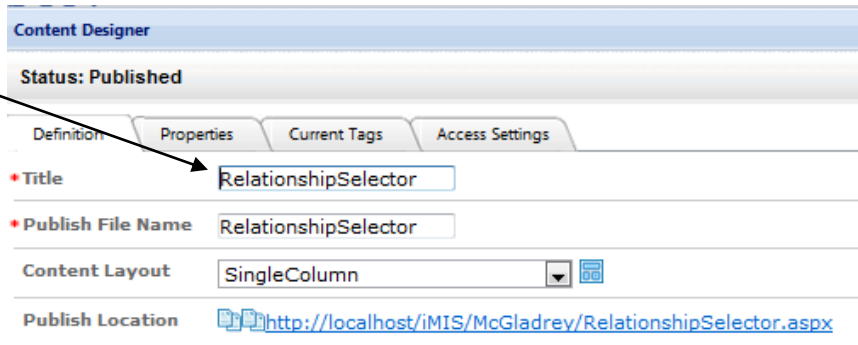   b. Create new folder called McGladrey under iMIS
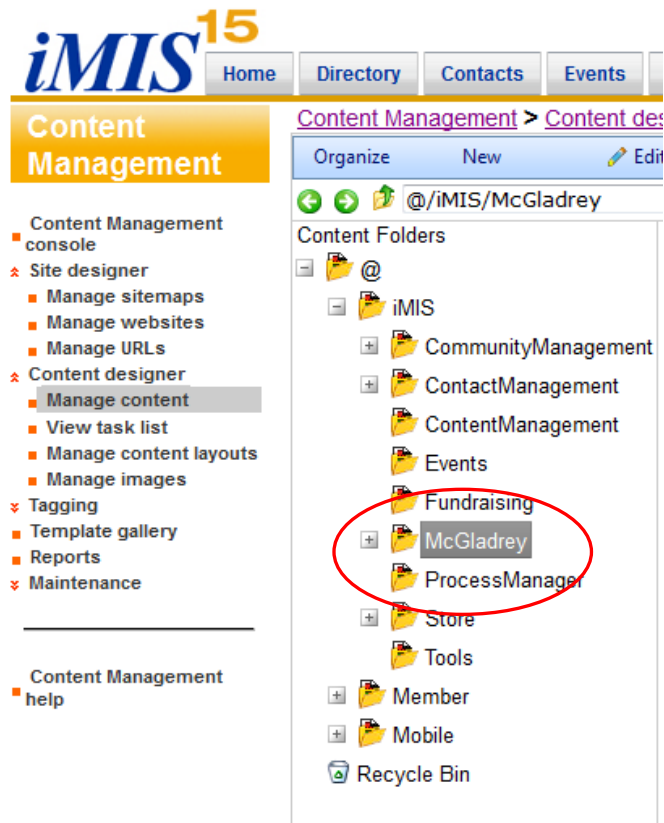
2. **Create new content for the selection page of the activities**

    a. Choose New
    b. Choose Website Content
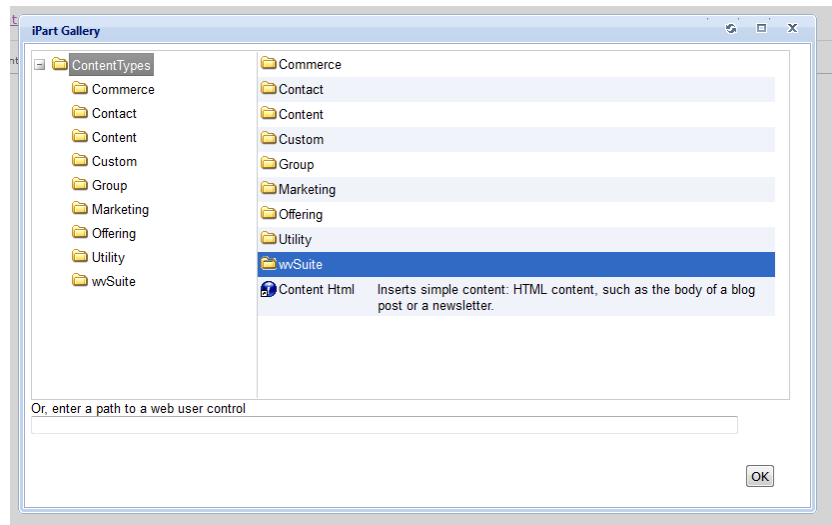
c. Title the new content RelationshipSelector

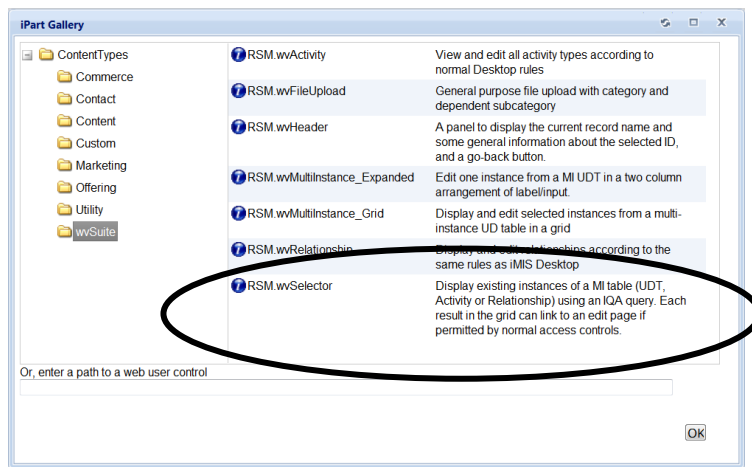*You can title this as you see fit. It wiiil need to be referenced in Step6c*

Content Designer

Status: Published

| Definition | Properties | Current Tags | Access Settings |

*Title RelationshipSelector

*Publish File Name RelationshipSelector

Content Layout SingleColumn

Publish Location http://localhost/iMIS/McGladrey/RelationshipSelector.aspx

d. Click add content and select the wvSuite folder

iPart Gallery

- ContentTypes
  - Commerce
  - Contact
  - Content
  - Custom
  - Group
  - Marketing
  - Offering
  - Utility
  - wvSuite

- Commerce
- Contact
- Content
- Custom
- Group
- Marketing
- Offering
- Utility
- wvSuite
- Content Html   Inserts simple content: HTML content, such as the body of a blog post or a newsletter.

Or, enter a path to a web user control

OK

e. Choose the RSM.wvSelector in the wvSuite directory

iPart Gallery

- ContentTypes
  - Commerce
  - Contact
  - Content
  - Custom
  - Marketing
  - Offering
  - Utility
  - wvSuite

- RSM.wvActivity   View and edit all activity types according to normal Desktop rules
- RSM.wvFileUpload   General purpose file upload with category and dependent subcategory
- RSM.wvHeader   A panel to display the current record name and some general information about the selected ID, and a go-back button.
- RSM.wvMultiInstance_Expanded   Edit one instance from a MI UDT in a two column arrangement of label/input.
- RSM.wvMultiInstance_Grid   Display and edit selected instances from a multi-instance UD table in a grid
- RSM.wvRelationship   Display and edit relationships according to the same rules as iMIS Desktop
- RSM.wvSelector   Display existing instances of a MI table (UDT, Activity or Relationship) using an IQA query. Each result in the grid can link to an edit page if permitted by normal access controls.

Or, enter a path to a web user control

OK

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3. Configure the RSM.wvSelector ipart

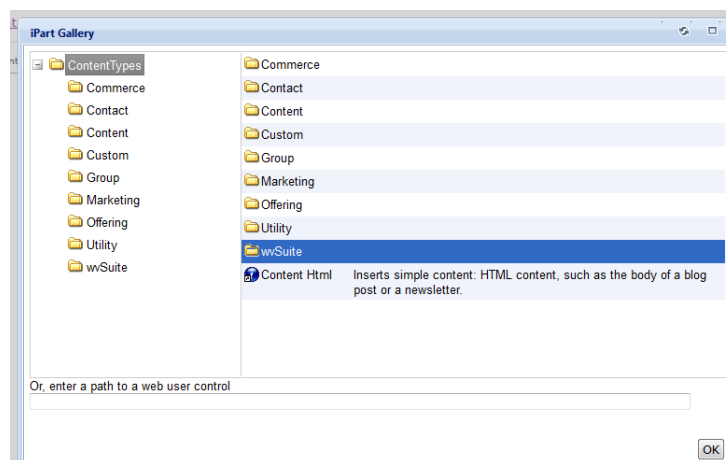| Field Name:	Description	Value
Name	*Unique Identifier of the part on the display page*	RelationshipSelector
Section Title	*Title on the page followed by selected name*	Relationships for
Instructions	*Instructions are displayed below the title. The instructions should give the user some information on how to use the feature or what is expected.*	
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 upon select or create new*	~/iMIS/McGladrey/RelationshipDetails.aspx
Child Page Type:	*Type of Child page*	Relationships
Allow "Create New" Button:	*When checked, a new item can be created in the target page by the user.*	Selected
Allow user to choose selector value on "Create New":	*When checked, allows 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:	*Select the IQA created in Step 3*	Click Select -> Select RelationshipSelector
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	*These are the filters for the query. When using iMIS ID, uses Selected ID*	select Auto Assign
Value		Selected iMIS ID

4. Create the Relationship Detail page
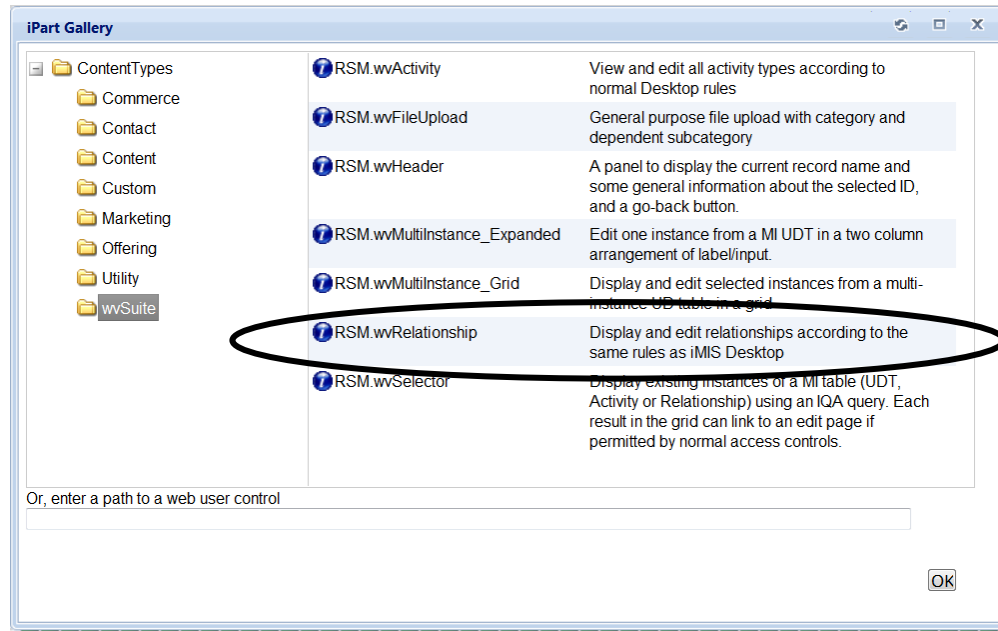
    a. Choose New

    b. Choose Website Content
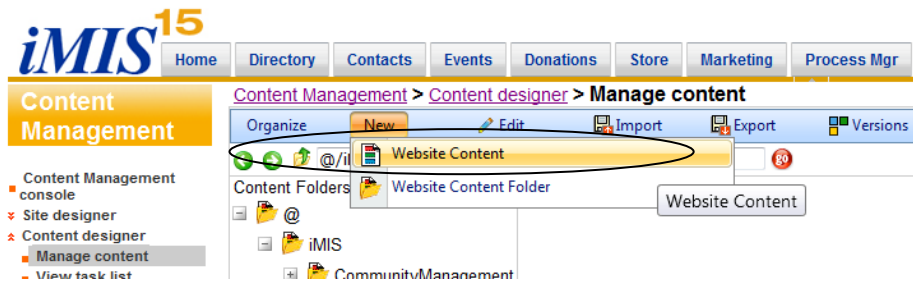
    c. Title the new content ActivityDetails

    d. Click add content and select the wvSuite folder

e. Choose the RSM.wvRelationship in the wvSuite directory

5. Configure RSM.wvRelationship

Configure iPart - RSM.wvRelationship

* **Name**   RelationshipDetail

wvRelationship configuration

Allow One Sided Relationships:

☐

This property can be left blank, in which case it will use the global setting (See step 7)

* **URL to Return To:**

~/iMIS/McGladrey/Relat

* **Folder containing IQA queries for target ID:**

$/RSMCustomizations/iP select

wvSuite version 1.0.6575.1090, Flavor=Release;Build=20120702.184827;Rev=6575;
Common version 1.0.6528.1000, Flavor=Release;Build=20120618.121405;Rev=6528;

Field Values:	Description	Value
Name	*You can name this as you see fit*	RelationshipDetail
URL to Return To:		~/iMIS/McGladrey/RelationshipSelector.aspx
Folder containing IQA queries for Target ID:	*This is the directory location of the queries which are to be used for the selecting the ID of the records involved in the relationship.*	

6. Add a navigation item for the Relationship selection information.

    a. Go to Site Designer-> Manage sitemaps
    b. Create the new website navigation item
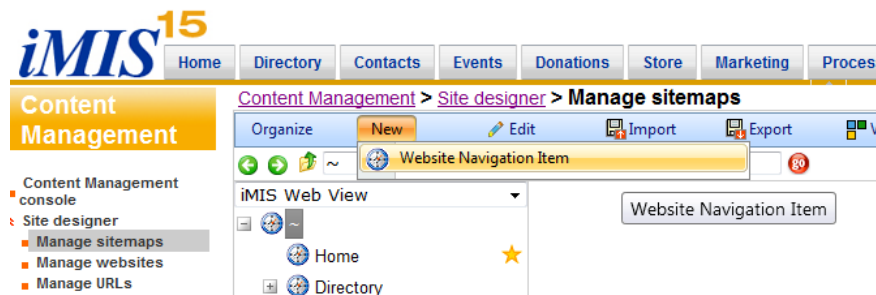
iMIS **15**

| Home | Directory | Contacts | Events | Donations | Store | Marketing | Process |

Content Management

Content Management > Site designer > **Manage sitemaps**

| Organize | New | ✎ Edit | 🗐 Import | 🗐 Export | 🔳 Vi |

Website Navigation Item

Content Management console

Site designer
- Manage sitemaps
- Manage websites
- Manage URLs

iMIS Web View

⊟ 🌐 ~
    🌐 Home   ⭐
⊞ 🌐 Directory

Website Navigation Item

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c. **For Content or URL to Link to:** Select -> RelationshipSelector
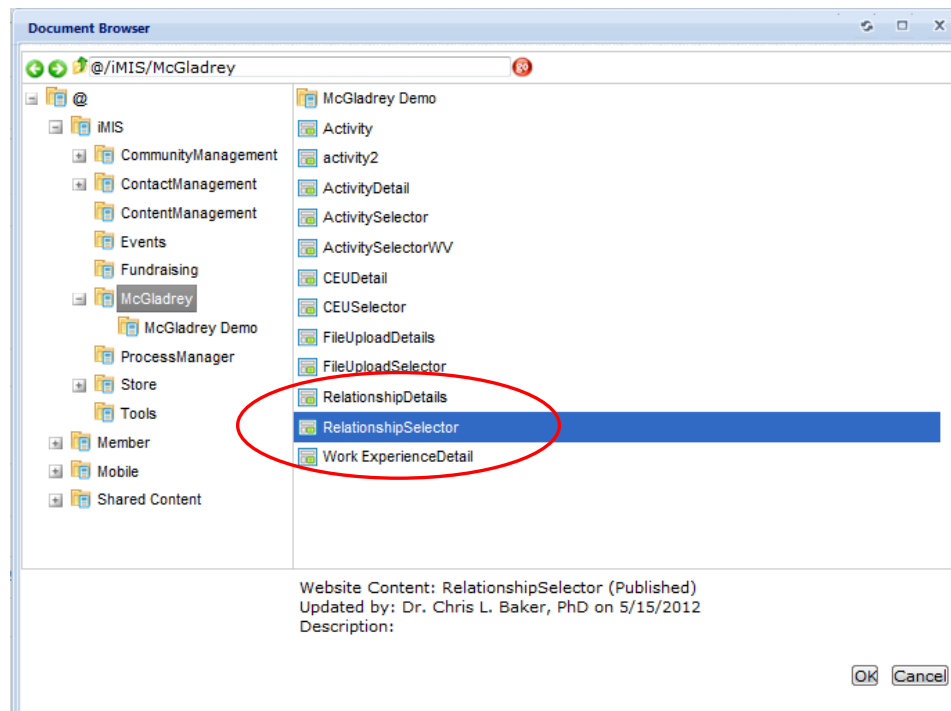
     d. Move the navigation item to your chosen location by dragging and dropping to preferred location in left navigation area.

     e. Publish the navigation item.

7. System Setup:

These settings can be found under System Setup->RSM Configuration

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

$/ContactManagement/DefaultSystem/Queries/Contacts

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Example of finished wvRelationship:

Selector page:

Detail Page:

wvRelationship– Create New Relationship
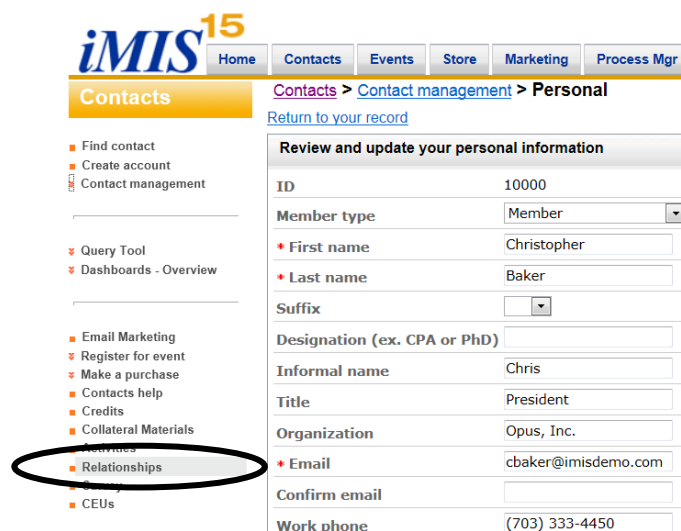
The following are steps to create a new relationship using the wvRelationship iPart.

1. Choose record on which the relationship is to originate.
   a. From Contacts tab (or tab labeled for your records), choose Find contact.

   b. Proceed normally to obtain desired record. (See standard iMIS documentation on how to retrieve a record.)

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

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

Contacts > **Relationships**

Relationships for Christopher Baker, Opus, Inc.

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
CHILD	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
KEY	193		Opus, Inc.	KEY				
KNOWS	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
KNOWS	10049	CASSIDY, SEYMOUR		KNOWS				
PARENT	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
RB	121	BONDLUM, JAMES	Spybreakers Ltd.	BOD				

4. A blank relationship screen now appears. Click on the magnifying glass to obtain the correct record for the relationship.

Contacts > **Relationships**

Relationship Detail

Target 🔑

*Relationship [Acquired ▼]

*Reciprocal [Acquired ▼]

Group Code [▼]

Note [ ]

Date Added   Last Updated   By

[Save] [Cancel] [Delete]

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5. Find a record using the queries available in the drop down list. Fill out the query's parameters and click the Find button to retrieve the desired record.

Records > Record management > **Relationships**

Search Types | by ID ▼
by ID
by Last Name
by Name
by RMHC Region
by State_Province
for all records in a specific city
for Individuals in My Chapter
for My Chapter
for My Programs and Related Organizations
for non RMHC Organization or Company
for non-Chapter Individuals
Orgs, Programs and Other Types of Companies (No Individuals)

*iMIS ID equals

Results

Ok   Cancel

Date Added ___ Last Updated __ By __

Save   Cancel   Delete

Records > Record management > **Relationships**

Country:
(Any) ▼

State/Province:
(US and Canada only)
Indiana ▼

Region
(Any) ▼

Record Type:
(Any)

...

Find

Results
15853 - Parkview Hospital 2200 Randallia Dr. Fort Wayne, Indiana 46805 U

Ok Cancel

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6. Highlight the correct record in the Results area and click OK.

7. Choose relationship type from drop down list of relationships.

8. Populate fields as appropriate. Click Save to keep the new relationship. Click cancel to discard.

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wvRelationship – Edit Relationship

The following are steps to edit an existing relationship using the wvRelationship iPart.

1. Choose record on which the relationship resides.
    a. From Contacts tab (or tab labeled for your records), choose Find contact.

    b. Proceed normally to obtain desired record. (See standard iMIS documentation on how to retrieve a record.)

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

3. Find the relationship you wish to edit from the list of previously created relationships. To assist in finding the relationship, the list can be sorted by any column. Click on the Column Title link to sort. Click on the same link again to sort in the opposite order.

4. Click the link in the Type column of the relationship to edit.

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

Contacts > Relationships

Relationship Detail

Target	Seymour Cassidy
*Relationship	Knows
*Reciprocal	Knows
Title	
Functional Title	
Group Code	
Note	Friends from college. Were in same fraternity.

Date Added 9/10/2002 Last Updated (none) By JOY

Save Cancel Delete

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