



# ChapterLink

## Installation Instructions

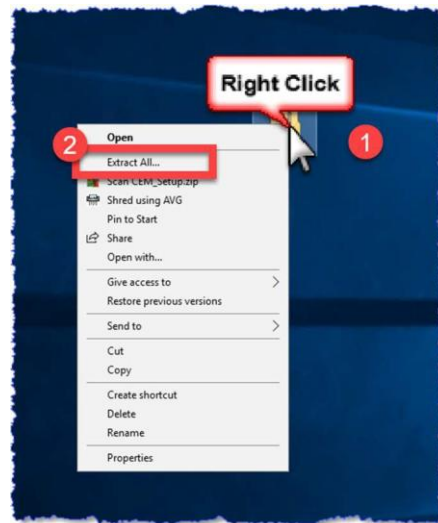
### Table of Contents

<b>Step 1 – Import and Configure ChapterLink Files .....</b>	<b>2</b>
Extract ZIP file .....	2
Import RiSE Pages .....	3
Import Sitemap entries.....	4
Configure ChapterLink settings .....	7
Import ChapterLink IQAs .....	8
Import ChapterLink Business Objects .....	10
Configure ChapterLink Shortcut .....	11
<b>Step 2 – Set up Chapter Base Event .....</b>	<b>12</b>
<b>Step 3 – Test the ChapterLink setup .....</b>	<b>13</b>
Create a new chapter .....	13
Create a new contact and assign the chapter administrator role.....	14

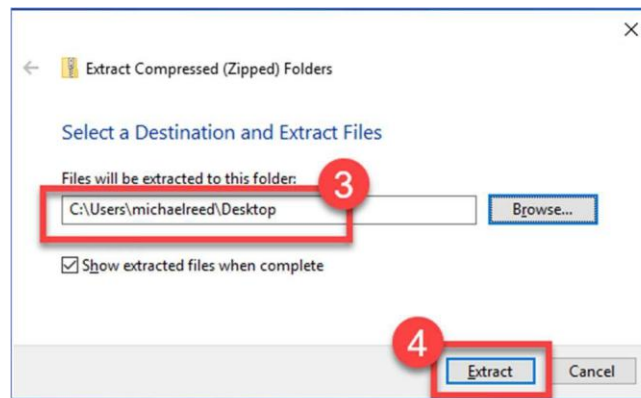
## Step 1 – Import and Configure ChapterLink Files

### Extract ZIP file

- (1) Locate **CEM\_Setup.zip**,  
and right-click on it.
- (2) Select **Extract All...**

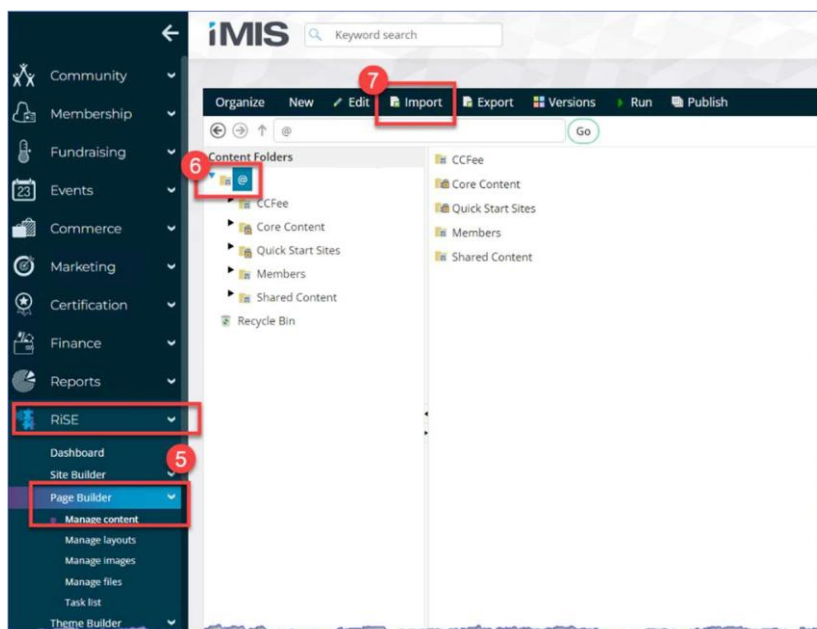


- (3) Select location to  
extract files
- (4) Click **Extract**.

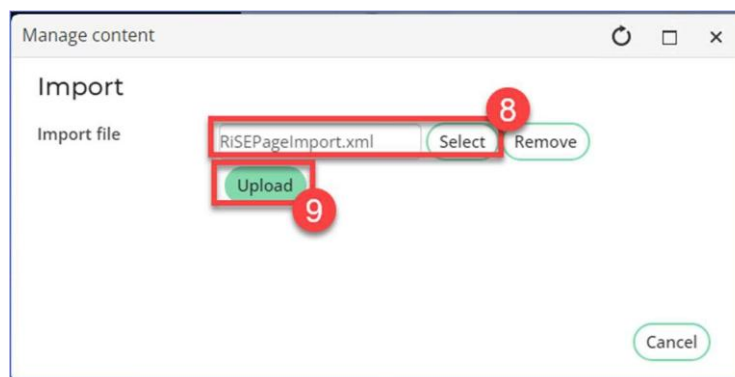


## Import RiSE Pages

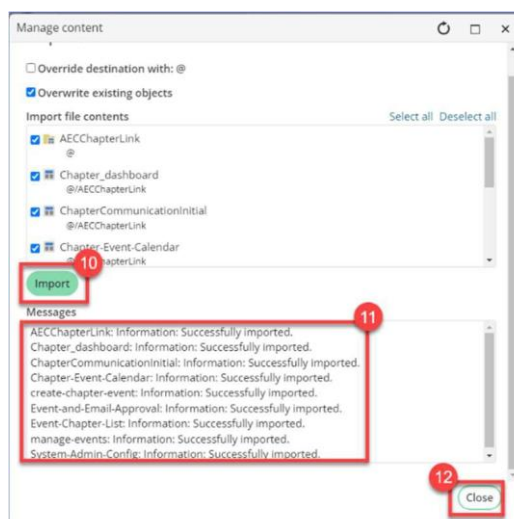
- (5) Navigate to your Staff site, and go to **Staff Site > RiSE > Page Builder**
- (6) Be sure that the root directory (“@”) is selected.
- (7) Click **Import**.



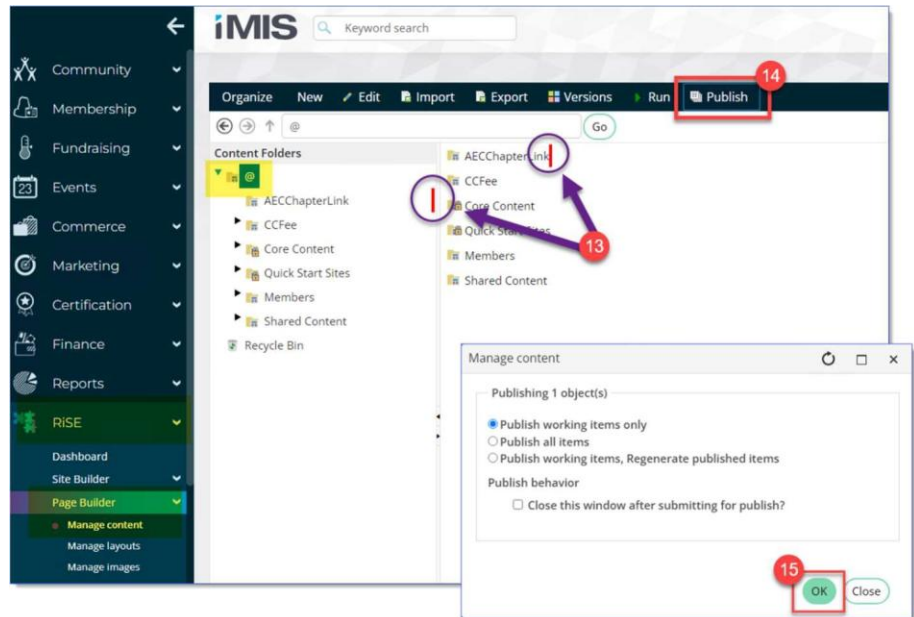
- (8) Click **Select** and choose **CEM\_RiSE Import.xml** from the extracted files.
- (9) Click **Upload**.



- (10) Click **Import**
- (11) Wait until the **Messages** box confirms successful import.
- (12) Click **Close**.

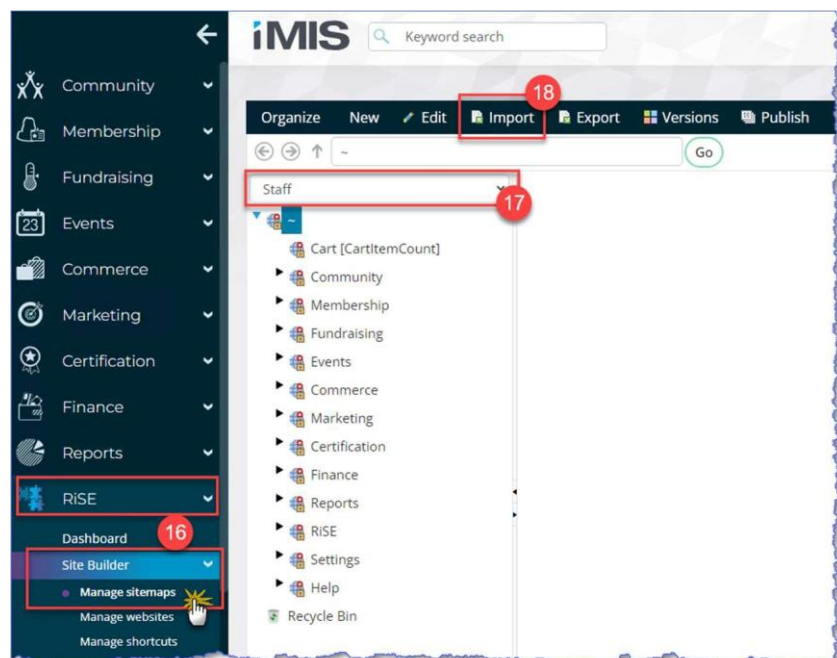


- (13) You will see the red lines indicating the pages have been imported but not yet published.
- (14) Click **Publish**.
- (15) Click **OK** to publish pages.

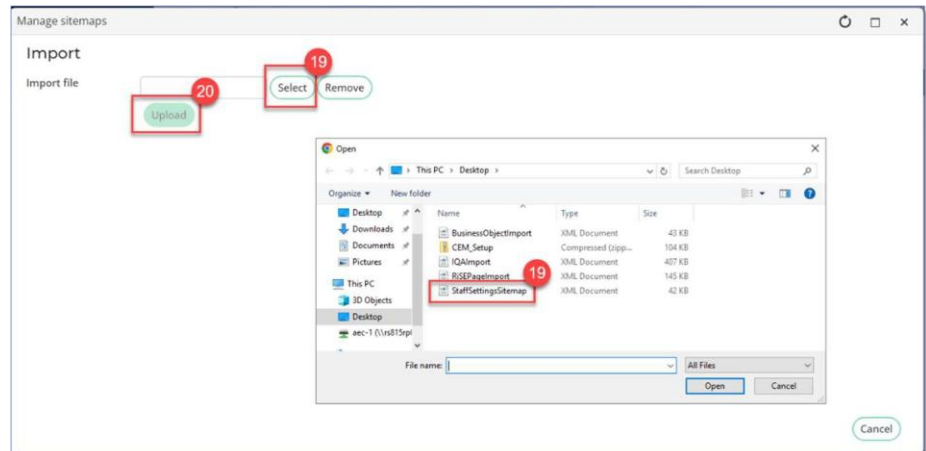


## Import Sitemap entries

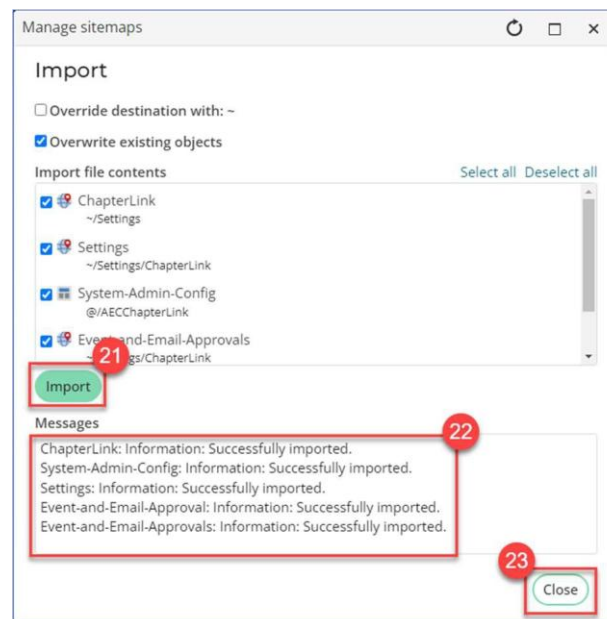
- (16) Navigate to **Staff Site > RiSE > Site Builder > Manage sitemaps**.
- (17) Be sure that **Staff** is selected.
- (18) Click **Import**.



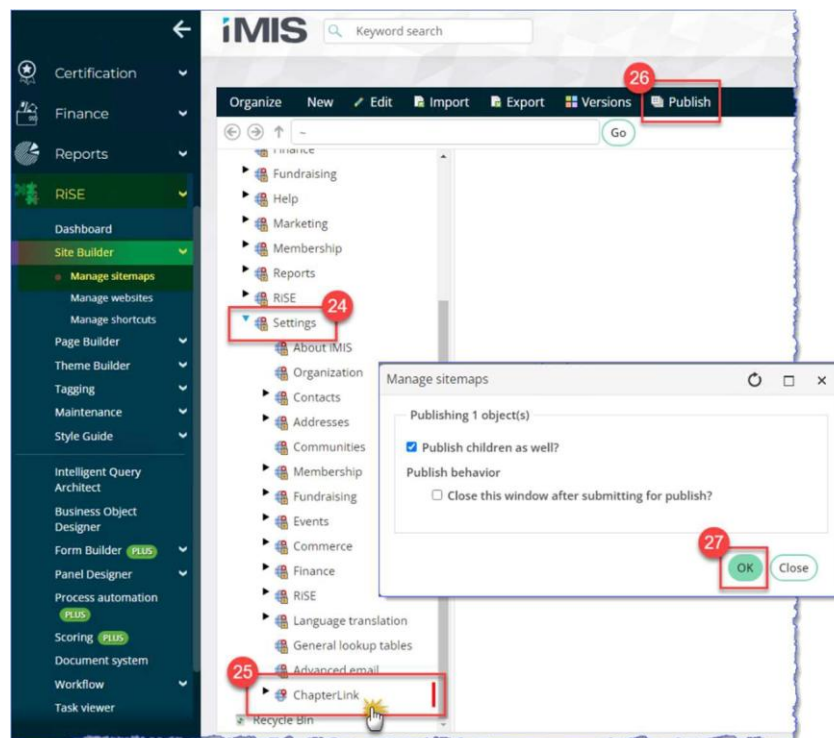
- (19) Click **Select** and choose **CEM\_Sitemap Import.xml**.  
(20) Click **Upload**.



- (21) Click **Import**.  
(22) Wait until the **Messages** box confirms successful import.  
(23) Click **Close**.



- (24) On the sitemap tree, click **Settings**.
- (25) Confirm that the **ChapterLink** sitemap item appears at the bottom of the list. You will see that it displays the red line indicating it has been imported but not yet published.
- (26) Click on the **ChapterLink** sitemap item and then click **Publish**.
- (27) Click **OK** to publish.



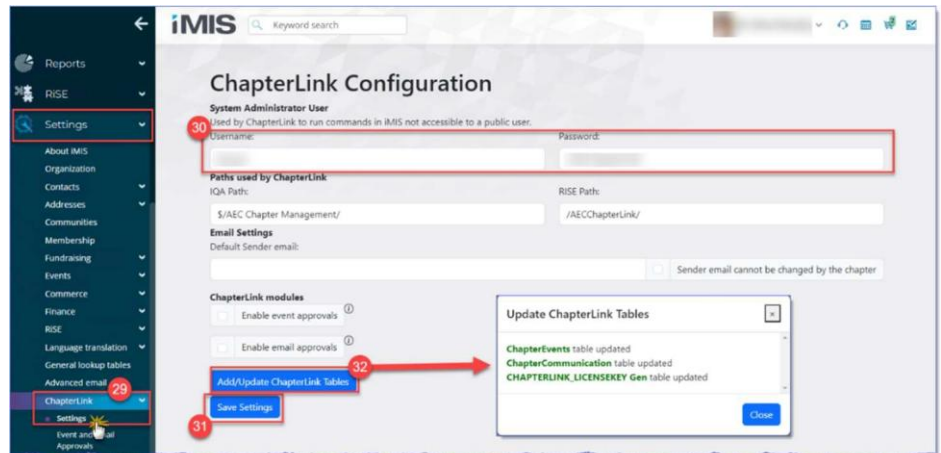
- (28) Confirm that the **ChapterLink** menu item and subitems appear on your staff site menu.



## Configure ChapterLink settings

Note: edit the RiSE page in [@/AECChapterLink/System Admin Config](#) then configure the Form Config HTML to replace the product key with the one provided by Armstrong, prior to following steps 29-32.

- (29) Navigate to **Staff Site > Settings > ChapterLink > Settings**.
- (30) Enter the user credentials for the system admin user (**\*\*see important note below\*\***).
- (31) Click **Save Settings**.
- (32) Click **Add/Update ChapterLink Tables**.

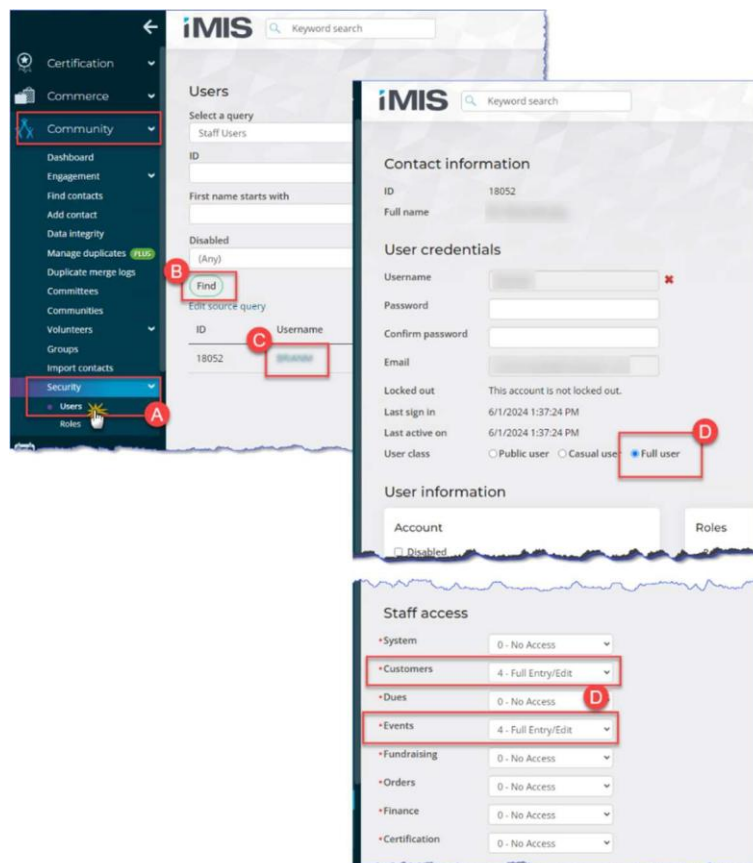


### **\*\*Important Note\*\***

User must be a Full user with Customers Module 4 – Full Entry/Edit and Event Module 4 – Full Entry/Edit or higher. ChapterLink will not function properly without these permissions.

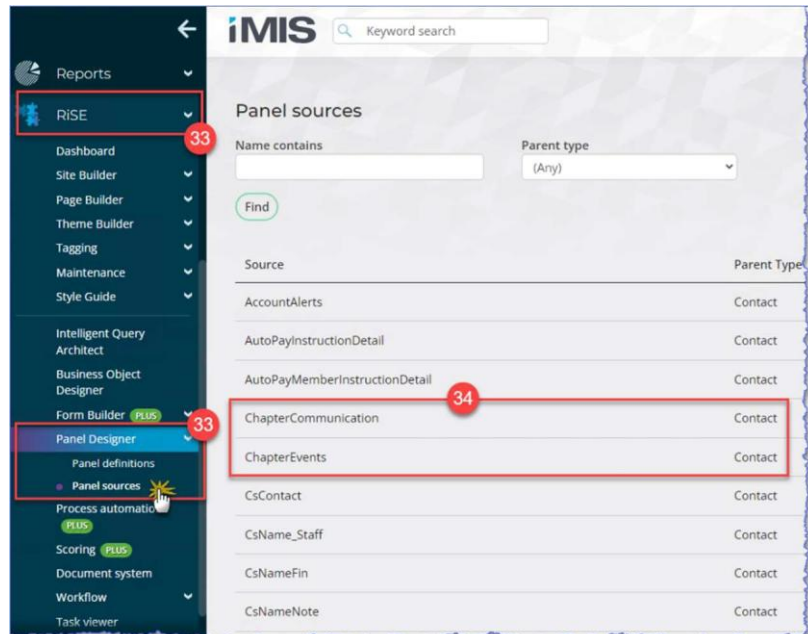
To confirm permissions:

- (A) Navigate to **Staff Site > Community > Security > Users**.
- (B) **Find** User.
- (C) **Click Username** in results.
- (D) Confirm that User is a **Full user** and that both **Customers** and **Events** are set to at least **4 – Full Entry/Edit** in the Staff access area.



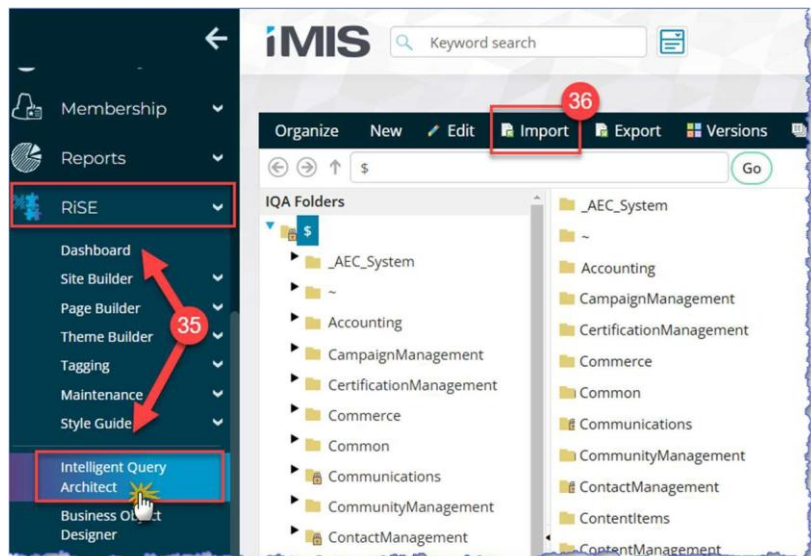


- (33) To confirm import of ChapterLink tables, navigate to **Staff Site > RiSE > Panel Designer > Panel sources**.
- (34) Confirm **ChapterCommunication** and **ChapterEvents** exist.



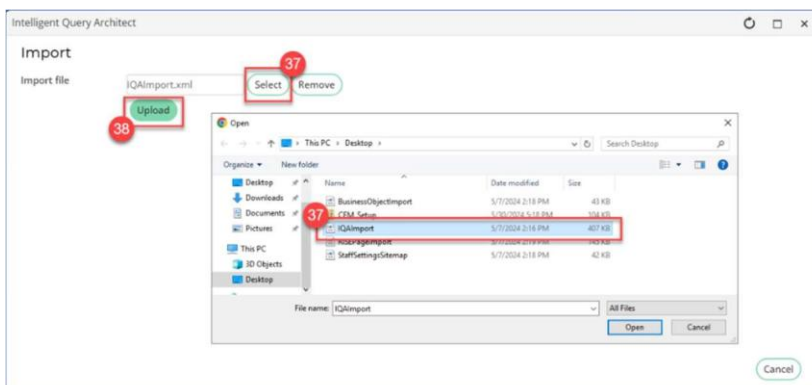
## Import ChapterLink IQAs

- (35) Navigate to **Staff Site > RiSE > Intelligent Query Architect**.
- (36) Click **Import**.

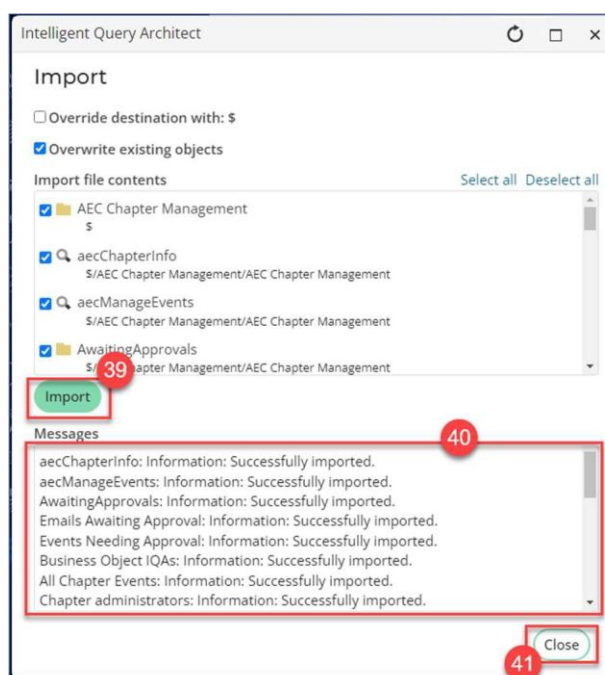




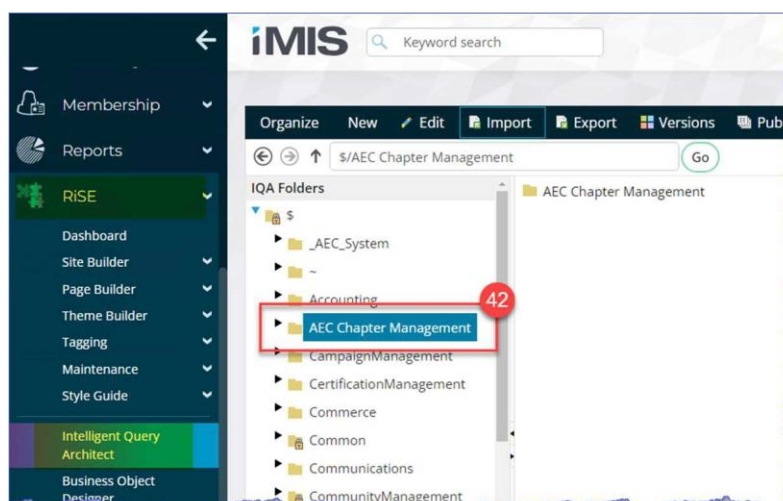
- (37) Click **Select** and choose **CEM\_IQAImport.xml**.  
(38) Click **Upload**.



- (39) Click **Import**.  
(40) Wait until the **Messages** box confirms successful import.  
(41) Click **Close**.

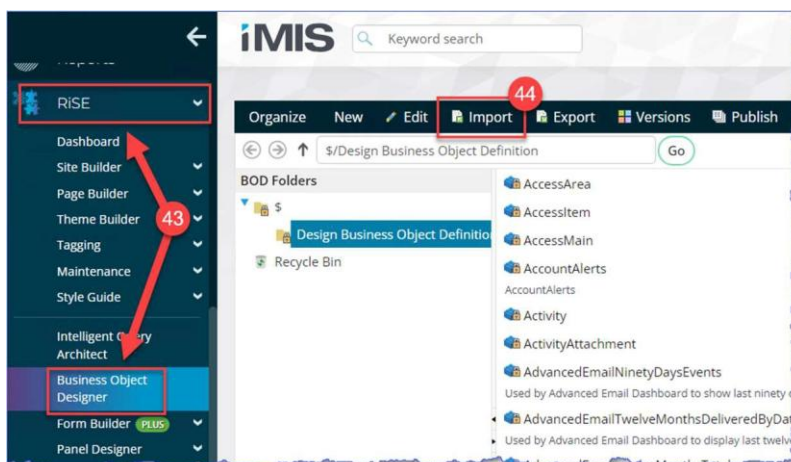


- (42) Confirm the **AEC Chapter Management** folder appears in the IQA Folders list.

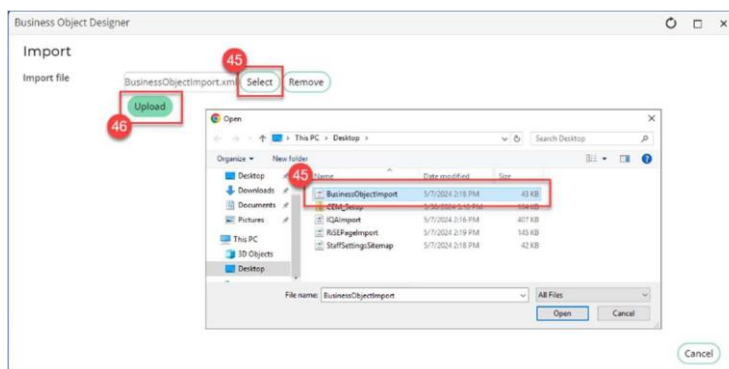


## Import ChapterLink Business Objects

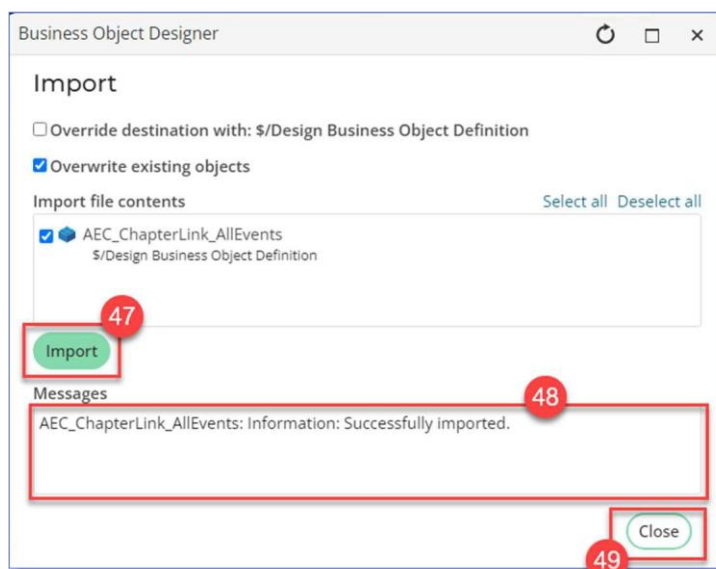
- (43) Navigate to **Staff Site > RiSE > Business Object Designer**.
- (44) Click **Import**.



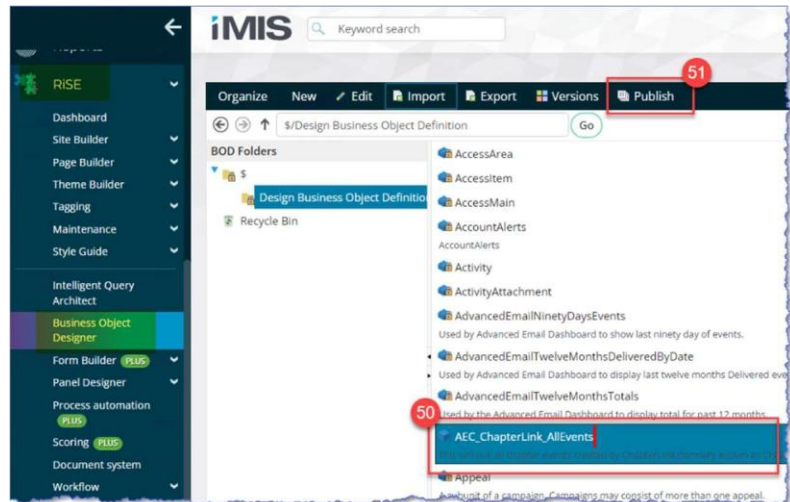
- (45) Click **Select** and choose **BusinessObjectImport.xml**.
- (46) Click **Upload**.



- (47) Click **Import**.
- (48) Wait until the **Messages** box confirms successful import.
- (49) Click **Close**.

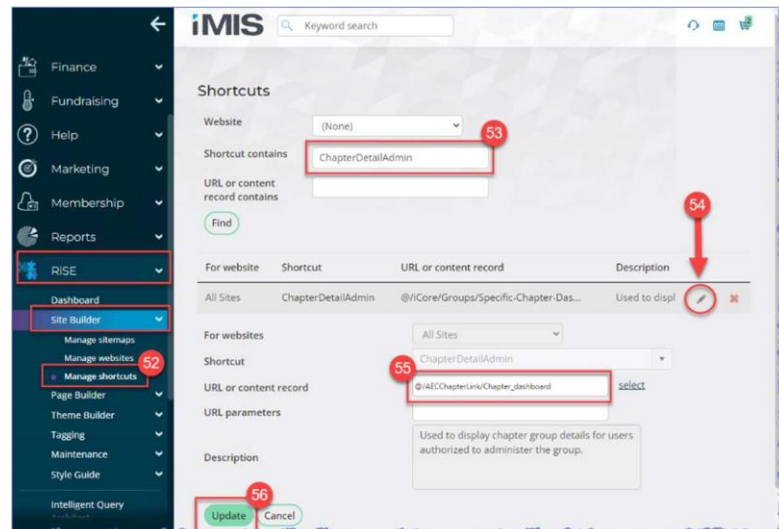


- (50) Confirm **AEC\_ChapterLink\_AllEvents** and **CsEventTemplate** appears in the Business Objects list.
- (51) Click **Publish** to publish the Business Object.



## Configure ChapterLink Shortcut

- (52) Navigate to **Staff Site > RiSE > Site Builder > Manage shortcuts**.
- (53) Search for **ChapterDetailAdmin**.
- (54) When the correct shortcut appears, click the **edit (pencil) icon**.
- (55) In the URL or content record field, enter **@/AECChapterLink/Chapter\_dashboard**
- (56) Click **Update**.



Map the other shortcuts listed below:

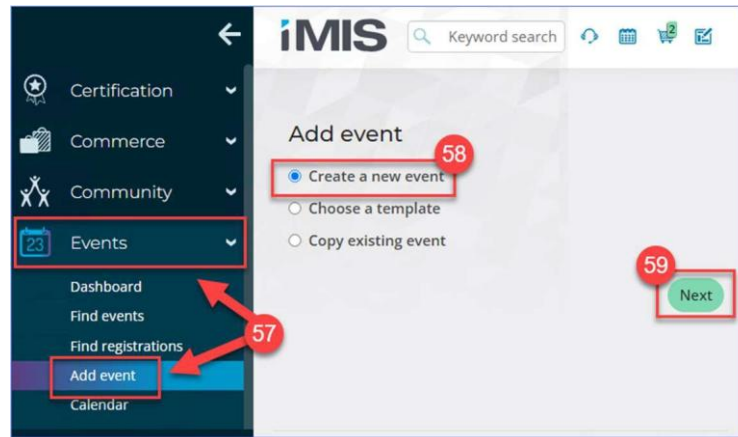
CommitteeDetailAdmin URL: @/AECChapterLink/Committee\_Detail\_Admin

ChapterDetail URL: @/AECChapterLink/Chapter\_Group\_Detail

## Step 2 – Set up Chapter Base Event

This should be addressed when running the table installation in step 32. Check Events > Manage Event Templates to confirm **Base Event for Chapter Admins** exists, if not, follow steps 57-65.

- (57) Navigate to **RiSE > Events > Add event**
- (58) Select **Create a new event**.
- (59) Click **Next**.



- (60) On the **Info** tab, enter the following:

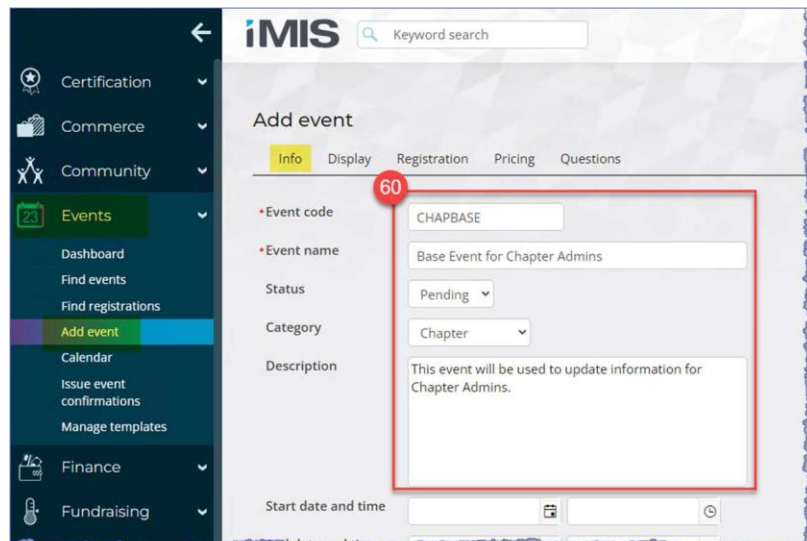
**Event code:** CHAPBASE

**Event name:** Base Event for Chapter Admins

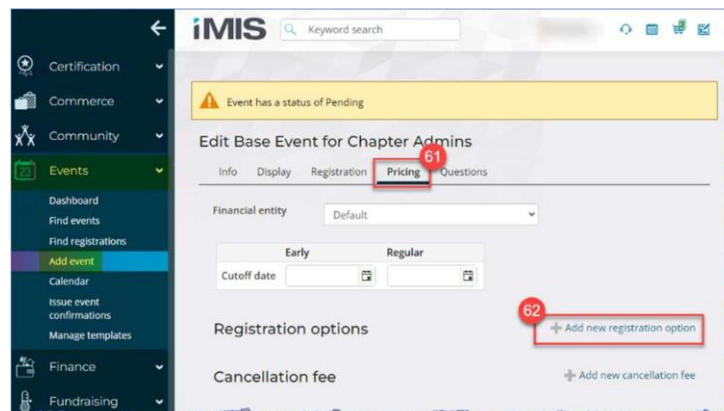
**Status:** Pending

**Category:** Chapter

**Description:** This event will be used to update information for Chapter Admins.

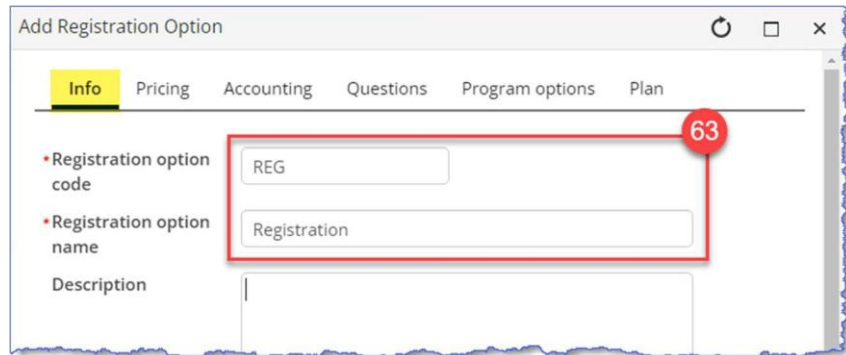


- (61) Click on the **Pricing** tab.
- (62) Click **Add new registration option**.



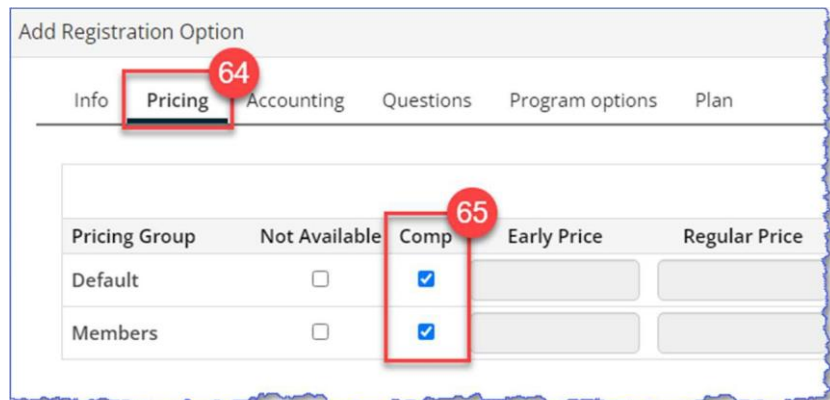
(63) On the Registration Option Info tab, enter the following:

**Registration option code:** REG  
**Registration option name:** Registration



(64) Click the **Pricing** tab.

(65) Check the **Comp** box for both Default and Members, then **Save and Close** the registration option and the event.



Pricing Group	Not Available	Comp	Early Price	Regular Price
Default	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Members	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

### Step 3 – Test the ChapterLink setup

#### Create a new chapter

(66) Navigate to **Membership > Chapters**.

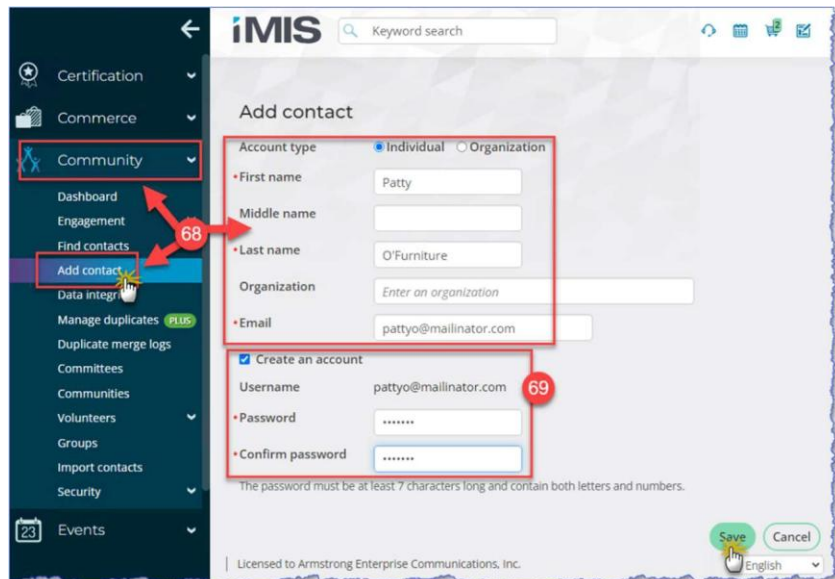
(67) Click **Add new chapter** and enter information to add the new chapter.



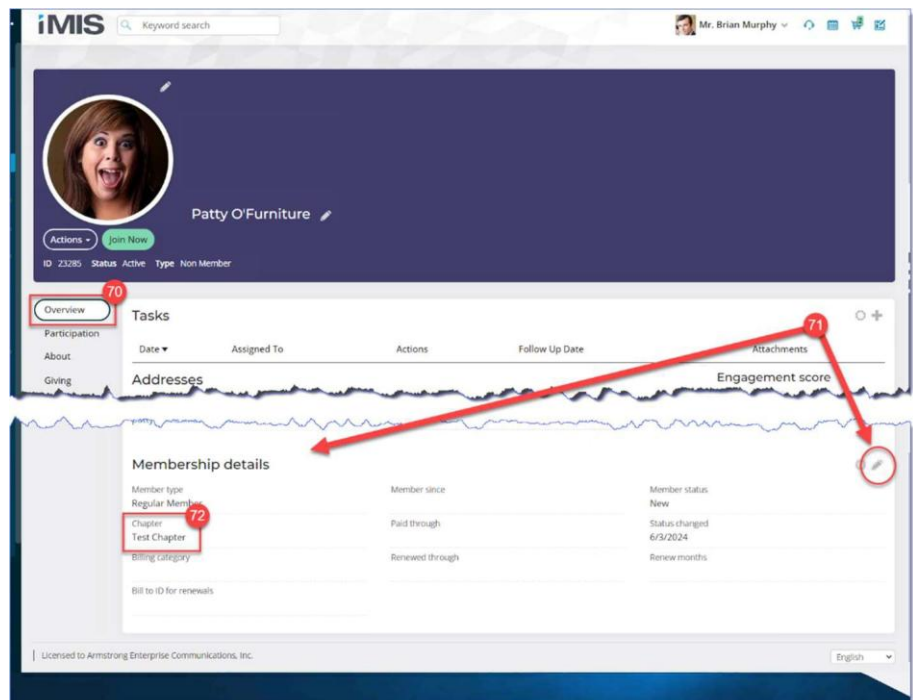


## Create a new contact and assign the chapter administrator role.

- (68) Create a new contact at **Staff Site > Community > Add contact**.
- (69) Be sure to check **Create an account** and enter a username/password, then click **Save**.

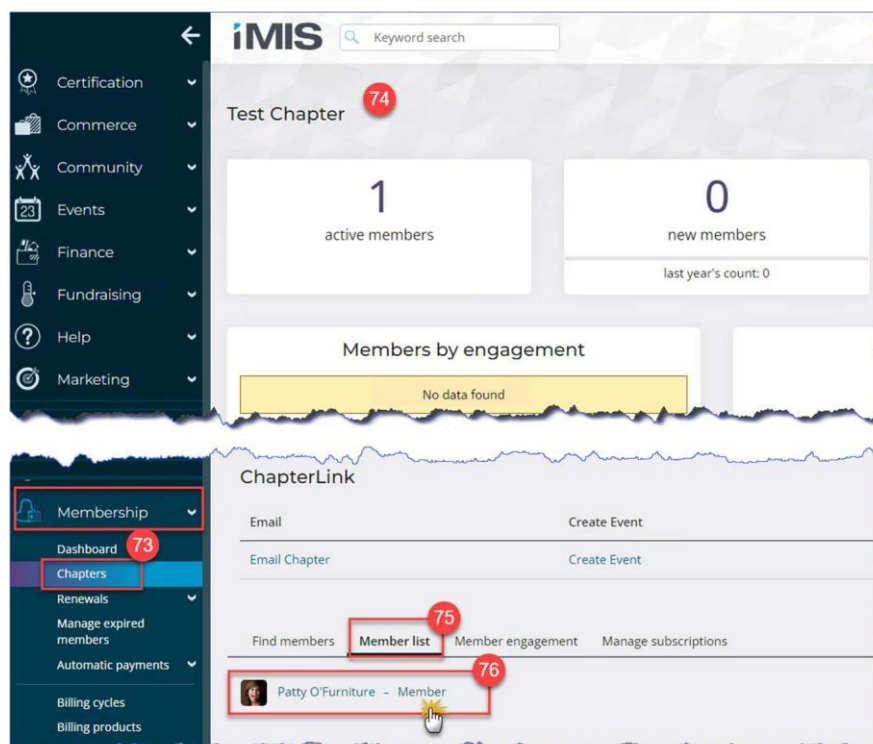


- (70) From the new record's profile, be sure you are on the **Overview** tab.
- (71) Scroll down to the **Membership details** section and click the **edit (pencil)** icon.
- (72) Using the Chapter drop-down, add the person to your test chapter and click **Save**.

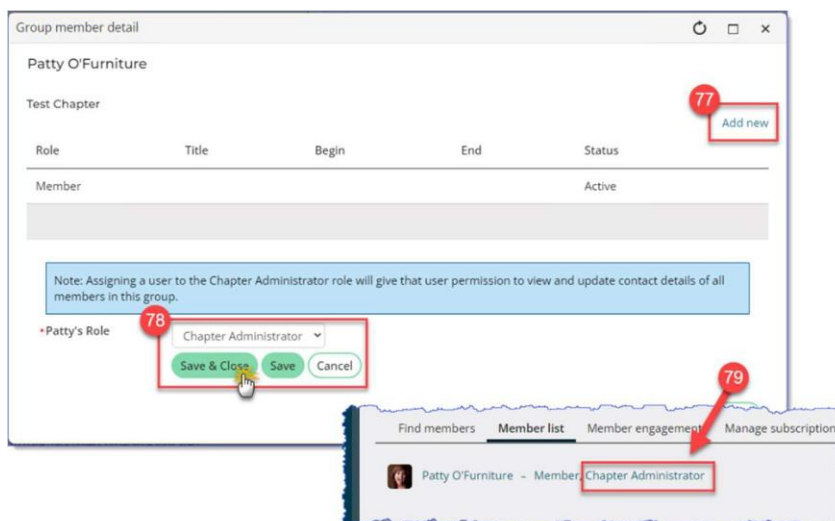




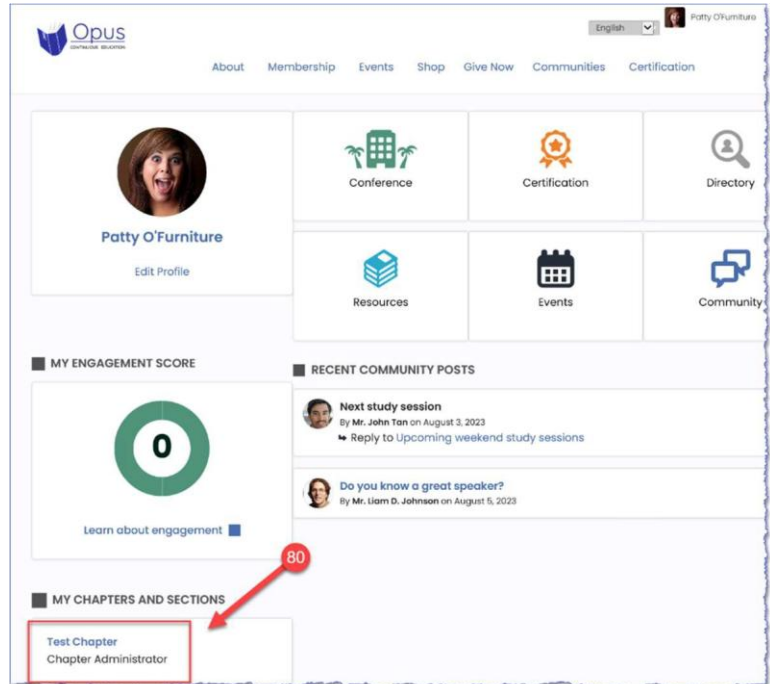
- (73) Navigate to **Staff Site > Members > Chapters**.
- (74) Select the Test Chapter that you added the contact to.
- (75) On the chapter page near the bottom, click on **Member List**.
- (76) Find your new contact's name, which should have the word "Member" following it. Click **Member**.



- (77) Click **Add new**
- (78) Select **Chapter Administrator** from the drop-down list and click **Save & Close**.
- (79) Your contact should now have Chapter Administrator added to their record.



(80) Either log out of iMIS or use a fresh browser to log in to your regular RiSE member site using the *new contact's* user credentials (**NOT** staff site). The QuickStart site looks like this example. Once you are logged in, click the **Test Chapter** under **My Chapters and Sections**.



(81) On the ChapterLink admin dashboard, select Email Chapter to start an email. Select Create Event to start the event creation process. Select Event List to display all current active events for that chapter.

See ChapterLink Docs for full documentation on ChapterLink emails and events.

