Page Designer Guide

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PageDesigner-2015

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Design Mode Basics

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Design Mode allows you to **customize** the program to better meet your organization's needs. You can add pages to the program, tabs and sections to pages, buttons and links to existing and new pages, and much more. You can also edit existing pages, tabs, sections, buttons, and other items, and you can control access to the various areas of the program.

Before you work in **Design Mode**, it is helpful to understand the program's anatomy. This section focuses on the user interface components to help you work in **Design Mode**.

Note: We recommend you save a copy of the XML before you make any changes so you can revert to the original XML to undo changes if you need to.

Program Components

To customize the program for your organization, it is helpful to first understand the program layout. For example, what happens if you add a new page vs. a new tab or a new section? How does an action differ from an action group? This section describes the program's anatomy so you can design pages, tabs, sections, and summary sections, to better meet your organization's specific needs.

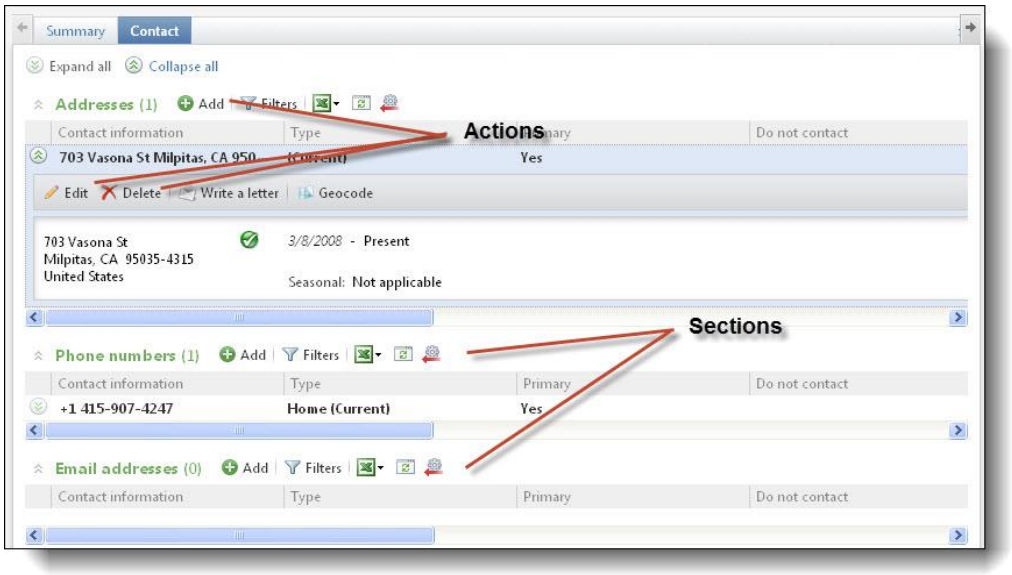
Pages

A page can include any program components except another page. You can include summary sections, tabs, page sections, and actions.

Note: Not all pages, functional areas, and tasks are customizable. For example, you cannot customize the Query page. From this page, if you activate the **Design Mode**, you will notice that most of the design features do not activate.

The components housed on a page are topically related. For example, the constituent page houses record components related to a constituent.The top half of a constituent page, the summary section, displays the constitute address, links to related areas in the program, and more. The bottom half of the page, the tabs, display other information about the constituent - contact information, financial information, etc.- arranged in a tabular format. Several tabs include actions - **Add**, **Edit**, **Delete**. The left side of the constituent record houses

information panes - action groups - providing the user easy access to **Tasks** and **More information** related to the constituent, in addition to **View as** options.



To determine what information appears on a page, click **Properties** in **Design Mode**. For more information, see Page-Level Design Mode Features on page 9.

Summary Sections

Summary sections are optional sections that may appear on a page and include actions.

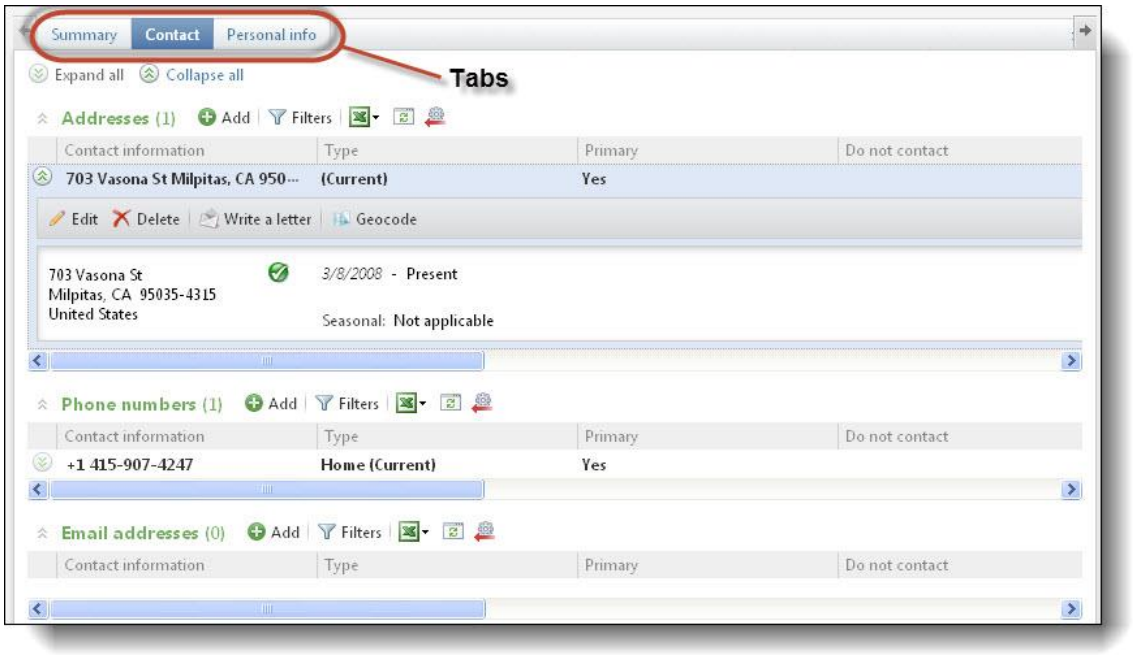
For example, the top half of the constituent page displays a summary section. The section displays the constituent address along with links (actions) to related areas in the program.

For more information, see Section-Level Design Mode Features on page 20

Tab

Tabs are optional and may appear on a page. Tabs may contain sections. For example, the bottom half of the constituent page displays a series of tabs: Summary, Contact, Personal Info, etc.

Note: If a page includes only one tab, the data displays directly on the page instead of using the tab design.



For more information, see Edit Tabs on page 13.

Sections

Sections are optional and contained in tabs. Sections can include actions.

For example, the **Addresses** section on the Contact tab of the constituent record page includes three actions: **Add**, **Edit**, and **Delete**.

For more information about the page section options, see Section-Level Design Mode Features on page 20.

Actions

Actions define what a user is allowed to do on a section or page.

- Add or edit information contained in a DataForm
- Navigate to a specific page in the program
- Display a report or dashboard in a separate window
- Perform operations, such as delete or refresh data or execute a process, such as generate receipts

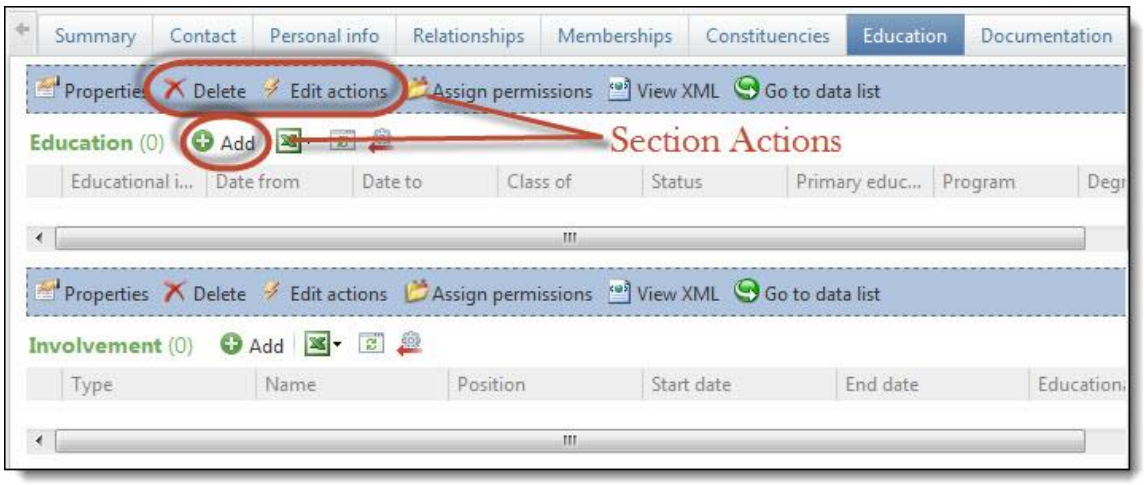
- Execute a custom block of code

The program supports two action types: section level actions and page level actions.

Section Actions

Each section in the program can support a set of actions. The action usually relates directly to the data presented in the section.

For example, on the Education tab of a constituent record, you can select to **Add**, **Edit actions** and **Delete** information contained in the tab. These actions - **Add**, **Edit actions**, and **Delete** - are section actions.



For more information, see Edit Action Properties on page 22. For information about sections, see Sections on page 3.

Page Actions

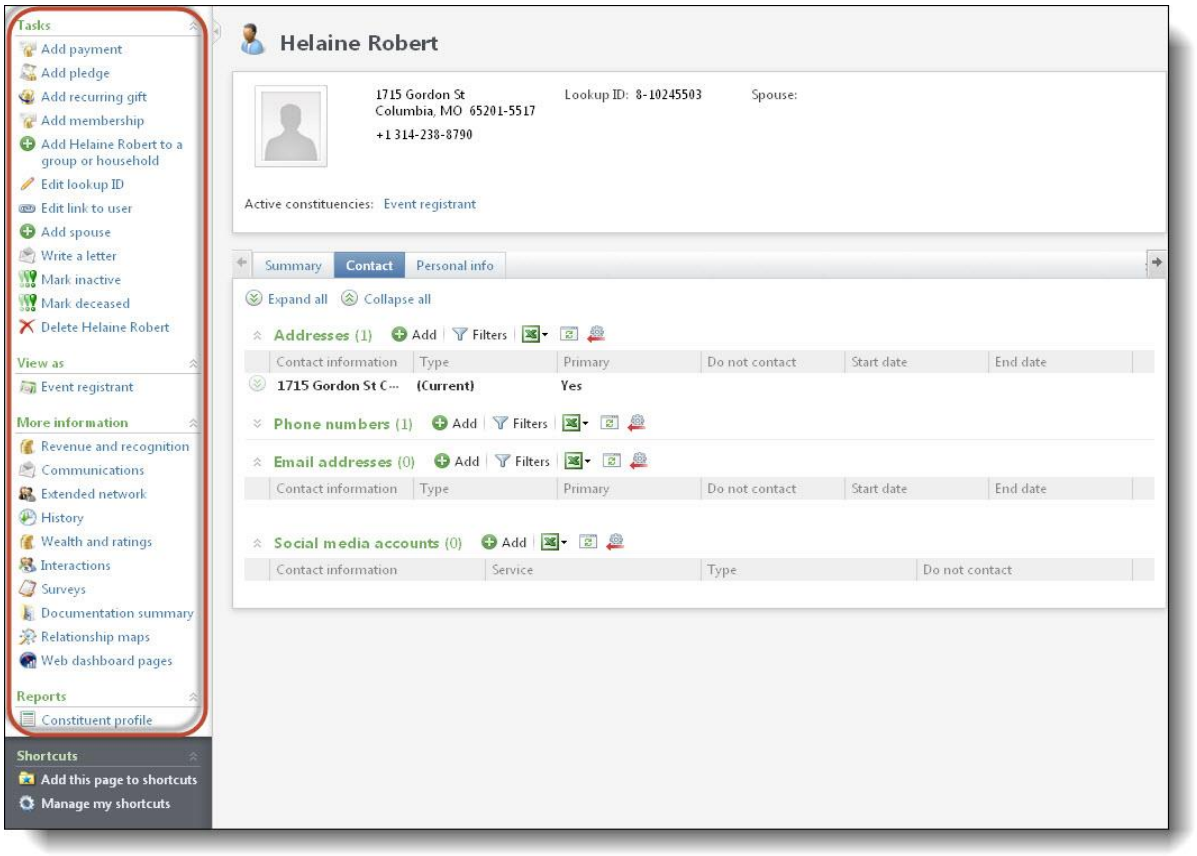
Page actions are contained within action groups. Action groups typically perform operations on the displayed record, such as refresh the page or access the help file. Other groupings may also link the page to related information in the program.

Action Groups

Action groups assemble sets of related operations on a page.

For example, in a constituent record, the **Tasks** action group houses actions related to a constituent, such as **Add payment**. The **More information** action group provides links to other areas of the program in which information is recorded about this record. The **Reports** action group includes links to related reports.

Note: The **View as** actions are conditional, based on information about the constituent that exists in other areas of the program.



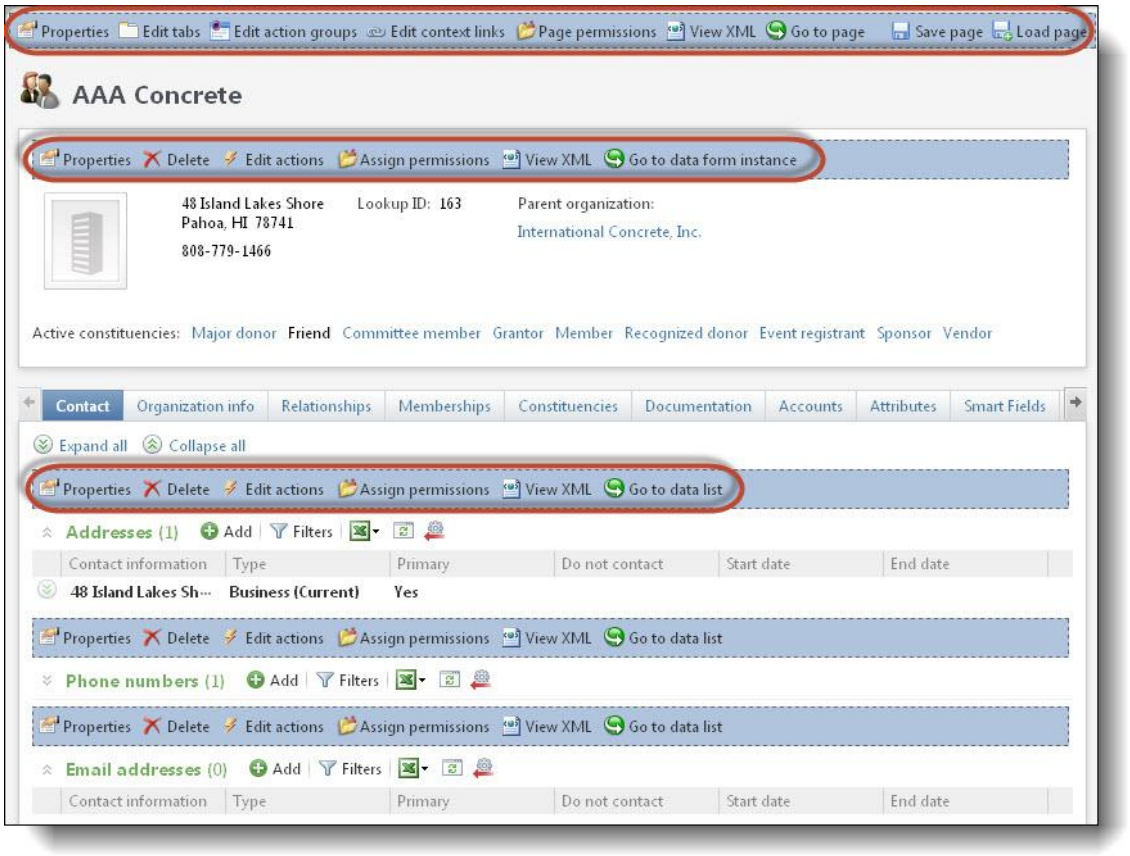
For information about how to add action groups, see Edit Action Properties on page 22.

Context Links

Context links are page level links, providing users easy access to other pages associated with the page. For example, on a system role record you can click the **System roles** context link to see all system roles.

Activate Design Mode

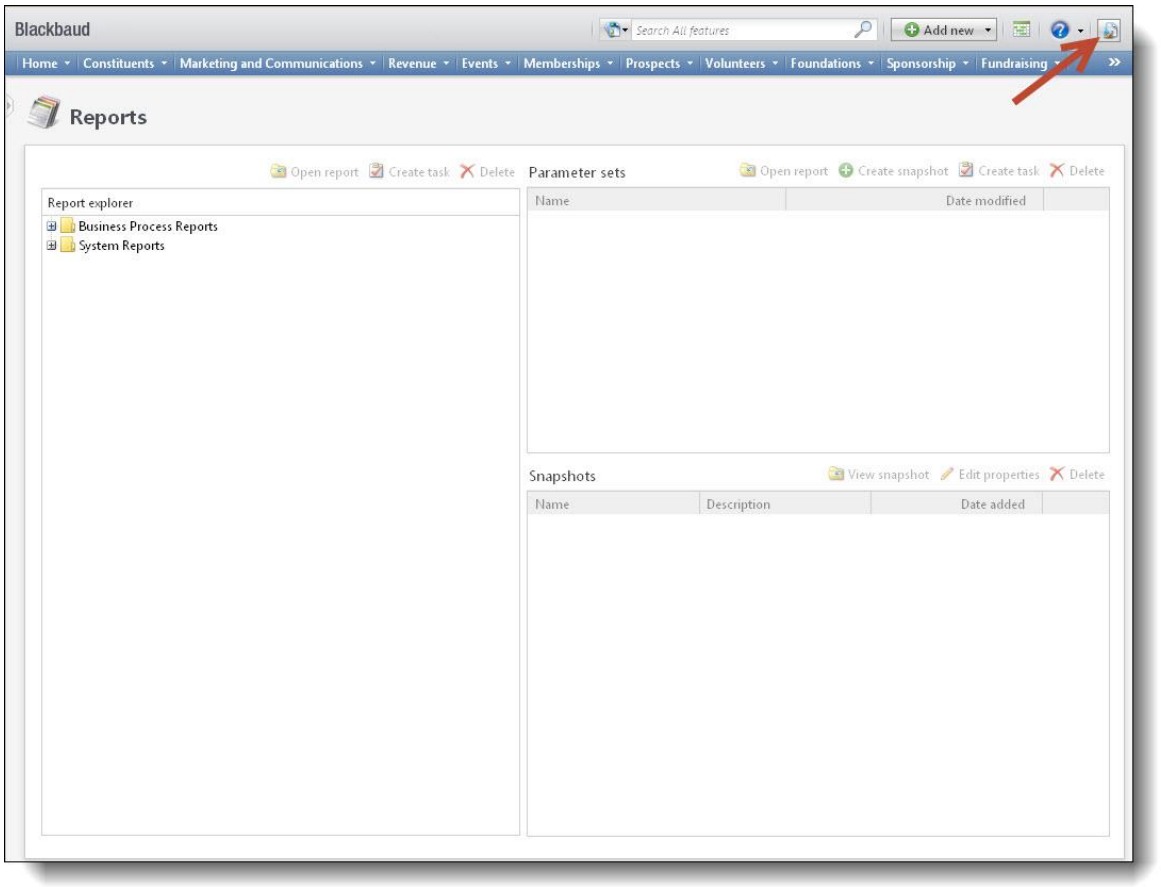
When you activate **Design Mode**, the page currently opened remains intact and design buttons appear, designating the editable areas. For example, the **Page Properties** button appears, which allows you to edit the appearance of the page.



Activate design mode

From the program, locate the page to edit.

On the upper right, click **Toggle design mode on**. The page designer buttons appear. For information about the buttons, see Page-Level Design Mode Features on page 9.



Establish Permissions

Design mode allows you to grant permissions on the page and feature level without the need to go through the security area. The page-level option allows you to assign permissions for all features included on the page from one area. The feature-level permissions allow you to create permissions one feature at a time.

Establish Page-Level Permissions

The **Page Permissions** option consolidates all permissions you can assign on a given page. For example, instead of opening the permissions functionality in every area included on a page - summary sections, tabs, action groups - you can open the Page Permissions screen and assign all permissions from this one area.

Note: You can still use the **Assign permissions** option available for each individual page element. The **Page Permissions** button simply provides a comprehensive, page-centric view of all features on the page from which to manage permissions. You can also still assign permissions to features via the System Roles page, which provides a role-centric view of features.

Assign permissions from the page-level

1. From the action bar, click **Page Permissions**. The Page Permissions screen for the selected page appears.
    - The **Features** frame displays all features included on the selected page.
    - The **System roles** frame displays existing permissions set for the selected page feature.
2. To assign a permission, select the page feature for which you want to establish permissions.
3. Click **Assign permissions**. The Assign Feature permissions screen appears.
4. Select a role.
5. To grant the selected role access, click **Grant**; to deny the selected role access, select **Deny**; to clear all existing assignments, click **Clear**.
6. Click **Save** to save your assignments and close the Assign Feature Permissions screen.

Establish Feature-Level Permissions

In **Design Mode**, you control which system roles have access to your newly designed page, section, tab, etc. With this feature-level security, you can independently secure feature areas in the program: constituent summary forms, address datalists, delete constituent operations, add new campaign operations, etc. On the page-level, any component for which no permission exists does not display to your users.

When a user with the specific role accesses the program, only areas and tasks for which they are granted permission appear. For example, if you create a new *Major Giving* page, and you created a Major Giving Managers role when you established program security, you can grant just members of the Major Giving Manager role permission to access your new page.

You can also set the same permissions for the entire system role (as opposed to just the feature) from **Security** in *Administration*.

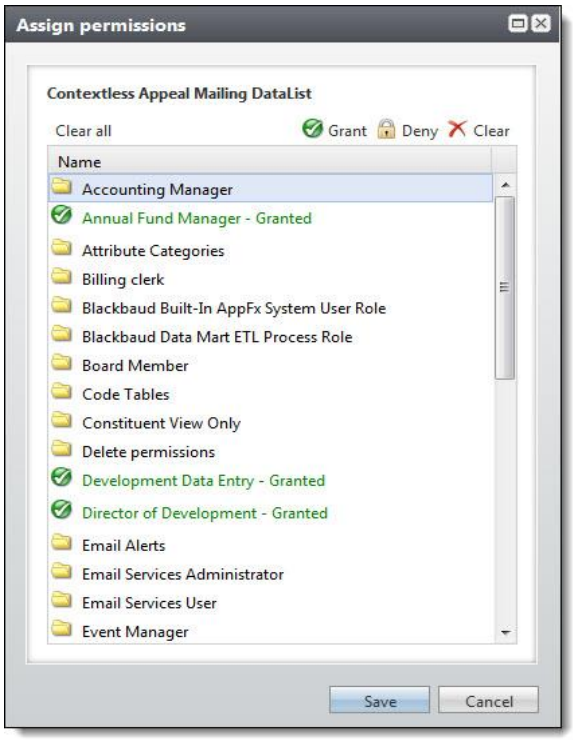
Note: For instructions about how to manage system roles and establish security, see the *Security Guide*.

Set user permissions in Design Mode

1. In the **Design Mode**, select the page or section to assign permission for. For example, to assign permissions for the **Financial accounts** section in the constituent record, open a constituent record and select the Accounts tab.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.

2. Click the **Assign Permissions** button in the area to assign permissions. To complete the example started in step one, you would click **Assign Permissions** in the **Financial accounts** section of the Accounts tab in the constituent record. The Assign Feature Permissions screen appears.



3. In the **Name** box, select a role.
4. To grant access, click **Grant**. To deny access, click **Deny**. To clear all existing assignments, click **Clear**.
5. Click **Save**.

Page-Level Design Mode Features

Page design features appear in the program when you set the program to **Design Mode**. In **Design Mode** you can edit the appearance of existing pages in the program. You can also assign security for the page, the section, the tab, etc.

Note: Not all pages, functional areas, and tasks are customizable. For example, you cannot customize the Query page. From this page, if you activate the **Design Mode**, most of the design features do not activate.

Edit Page Properties

In **Page Properties**, you edit the appearance and functionality included on pages.

The following items can be added or changed from Page Properties:

- Name of page
- Description of page
- Caption that appears at the top of the page
- Caption resource file used for localization
- Images associated with the page
- Help documents associated with the page

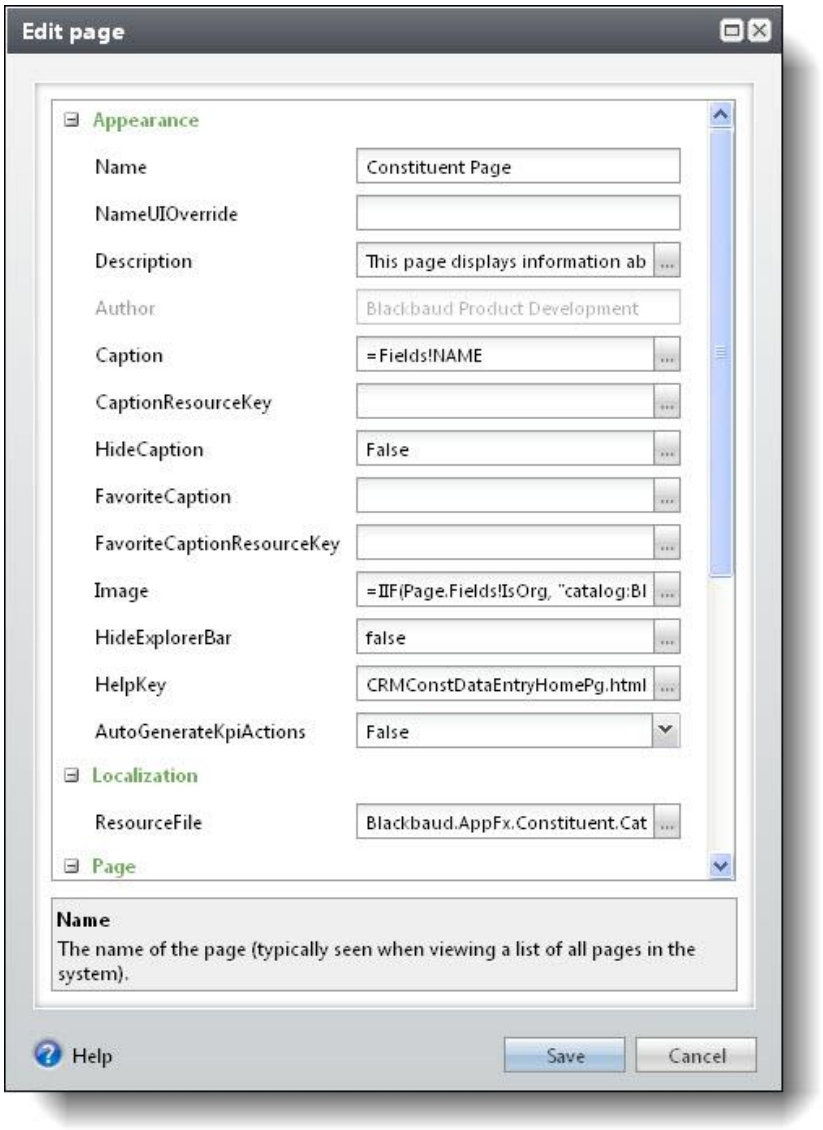
- Resource file used for localization
- Page record type
- Expression data form associated with the page
- Summary sections
- Tabs
- Action groups
- Context links
- Page navigation tree

After you make your changes and save the page properties, the changes appear on the page.

Edit the properties of a page

1. With the page in **Design Mode**, click **Properties**. The Edit page screen appears.

Note: For instructions about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. Enter your changes for the page. For information about the options on this screen, see Page Properties Screen on page 11.
3. Click **Save.**

Page Properties Screen

The **Appearance** frame in **Properties** houses the cosmetic elements of a page. The **Page** frame in **Properties** houses the elements that actually define the page.

Screen Item	Description
Name	Name of the page. The **Name** is typically seen by users working on the Pages tab in **Shell Design** in *Administration*. This tab lists of all pages available in the program. For information about **Shell Design**, see Shell Design on page 29.
NameUIOverride	Name displayed in the page header. If you do not enter a

Screen Item	Description
	name here, the **Name** entry is used.
Description	Description of the screen. The **Description** is typically seen by users working on the Pages tab in **Shell Design** in *Administration*. This tab lists of all pages available in the program. For information about **Shell Design**, see Shell Design on page 29
Author	Identifies the party responsible for creating the page.
Caption	Title that appears at the top of the page.
CaptionResourceKey	Resource key, if any used to localize the page caption.
HideCaption	
FavoriteCaption	
FavoriteCaptionResourceKey	
Image	Expression/image that appears at the top of the page. For more information, see Select Images on page 60.
HideExplorerBar	
HelpKey	Location and file name of the document containing help information related to this section. Users can then access the help document by clicking the **Help** icon. If you store the file in the program's standard help directory, drive:\ infinity, you do not have to enter the location information, just the file name.
AutoGenerateKpiAction	Automatically generates a key performance indicator (KPI) action. For information about KPIs, see the *Reports and KPIs Guide*.
ResourceFile	Identifies the resource file containing the strings required for localization.
RecordType	Record type with which this page is associated. For example, is this page to be used for constituent data? If so, select "Constituent." Is this page to be used for volunteer data? If so, select "Volunteer."
ExpressionDataForm	Data form to use for expressions created for the page. For more information, see Use Expressions In Design Mode on page 59.
SummarySection	Defines the summary section, if any, included on the page. For information about summary sections, see Summary Sections on page 2. For information about how to work with summary sections, see Edit Summary Section Properties on page 24.
ExplorerBarSection	
Tabs	Defines the tabs, if any, included on the page. For information about tabs, see Tab on page 2. For information about how to work with tabs, see Edit Tabs on page 13.
ActionGroups	Defines the action groups, if any, included on the page. For information about action groups, see Page Actions on page 4. For information about how to work with action groups, see Edit Action Groups on page 15.
ContextLinks	Context links are page level links providing users easy access

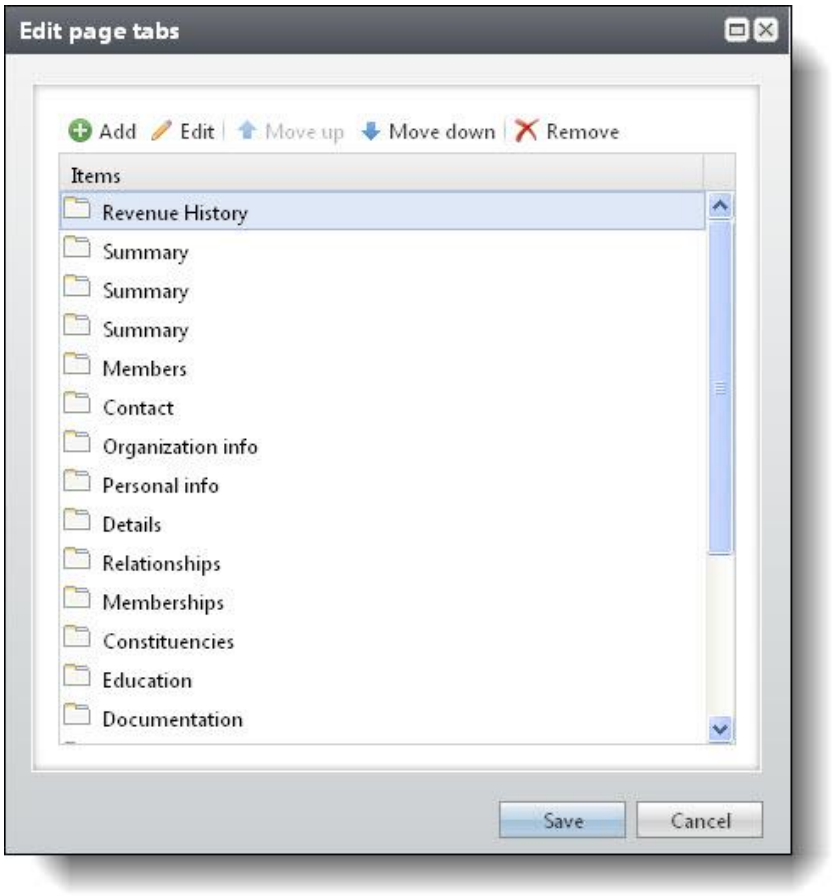
Screen Item	Description
	to other pages associated with the page. For more information, see Context Links on page 5.
Page Navigation Tree frame	Defines the navigation tree, if any, included on the page. For information about navigation trees, see Define Page Navigation Trees on page 88.

Note: For instructions about how to activate **Design Mode**, see Activate Design Mode on page 5.

Edit Tabs

The **Edit Tabs** button available in **Design Mode** allows you to edit existing tabs, delete tabs, and add tabs to a page.

Note: You can also access the tab properties from the page properties screen. Click **Properties** and then click the ellipsis at the end of the **Tab** field.



You can add or change the following items the Edit page tabs screen:

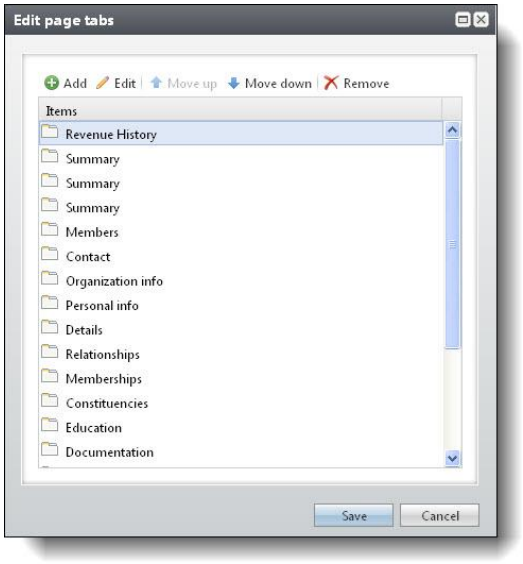
- Caption that appears at the top of the tab
- Caption resource file used for localization
- Images associated with the tab

- Visibility
- Sections included on the tab

After you make your changes and save the Edit page tabs screen, the changes appear on the page.

Edit tabs on a page

1. On the page to edit tabs in **Design Mode**, click the **Edit Tabs** button. A screen appears with the page's existing tabs.



2. To delete a tab, in the **Members** box select the tab to delete and click **Remove**.
3. To edit properties of an existing tab, select the tab in the **Members** box. The tab properties appear in the **Properties** box. Enter the necessary information.

Note: For information about the options in the **Properties** box, see Tab Properties on page 14

4. To add a new tab, click **Add**. A blank **Properties** box appears on the right. Enter the necessary information.
5. Click **Save** to save your tab edits.

Tab Properties

The **Properties** box for tabs houses the elements that define the tabs included on a page.

Screen Item	Description
Caption	Name of the tab.
CaptionResourceKey	Resource key, if any, used to localize the tab caption.
Image	Name and icon associated with any selected image. For information about how to select images, see Select Images on page 60.
Visible	Visibility status of tab: False = not visible; True = visible.
Section	Defines the section, if any, included on the tab. For information about sections, see Sections on page 3. For information about how to work with sections, see Section Property Screen on page 21.

Edit Action Groups

The **Edit Action Group** button available in **Design Mode** allows you to edit action groups. For example, in the default version of the program, **Tasks** are an action group. The **Tasks** actions appear in individual panes on the left side of the screen in several areas of the program. Each action group contains specific actions.

Note: You can also access the tab properties from the page properties screen. Click **Page Properties** and then click the ellipsis at the end of the **ActionGroups** field.

For example, in a constituent record, the default tasks included in the **Tasks** action group are **Edit link to user, Mark inactive**, **Mark deceased**, **Delete**, and **Refresh**. The **Help** link also appears in this group. The **View as** action group tasks link to other areas of the program in which information about the constituent exists. For example, if the constituent has a prospect record, **Prospect** appears as a link in the **View as** action group. In addition to changing the existing action groups, you can add and delete action groups using the **Edit Action Group** button.

The following items can be added or changed from the action group properties screen:

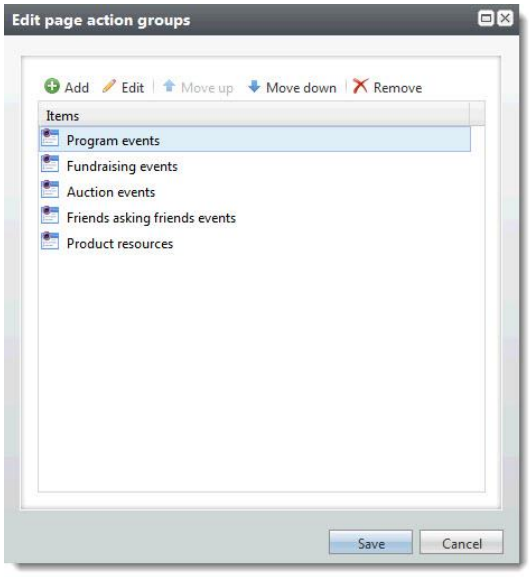
- Caption used to identify the action group
- Caption resource file used for localization
- Images associated with the action group
- Actions included in the action group

After you make your changes and click **Save** on the properties screen, the changes appear on the page.

Edit action groups for a page

1. On the page to change in **Design Mode**, click **Edit Action Groups**. A screen appears with the page's existing action groups.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. To delete an action group, select the group to delete and click **Remove**.
3. To edit properties of an existing group, select the group and click **Edit**. The group properties display. Enter the necessary information.

Note: For information about properties, see Action Group Properties Screen on page 16

4. To add a new action group, click **Add**. Enter the necessary information.
5. To rearrange the action groups in a different order, select the action group you want to move and click **Move up** or **Move down**.
6. Click **Save** to save the action group and return to the page.

Action Group Properties Screen

The **Properties** box for action groups houses the elements that define the action groups included on a page.

Screen Item	Description
Caption	Name of the action group (i.e., **Tasks**, **View as**).
CaptionResourceFile	Identifies the resource file containing the strings required for localization.
Image	Name and icon associated with any selected image. For information about how to select images, see Select Images on page 60.
Visible	Visibility status of action group: False = not visible; True = visible.
Actions	Defines any actions (**Mark inactive**, **Delete**) included in this action group. Click the ellipsis button at the end of the field to access the Actions screen. For more information about how to create actions for groups, see Define Action Groups on page 83.

Edit Context Links

The **Edit Context Links** button available in **Design Mode** allows you to edit a context link associated with the open page. Context links appear at the top of the page and allow users easy access to other areas of the program.

Note: You can also access the context link properties from the page properties screen. Click **Page Properties** and then click the ellipsis at the end of the **ContextLinks** field.

For example, in the default version of the program, a system role opened from **System Roles** in *Administration* includes a context link that takes users from the system role screen back to the System Roles screen.

Warning: If you add a context link to a page and a user does not have rights to view the page to which the Context link is linked, the text of the link still appears at the top of the page, but the navigation is disabled, so the user cannot access the linked page to which he does not have rights.

The following items can be added or changed from the context link properties screen:

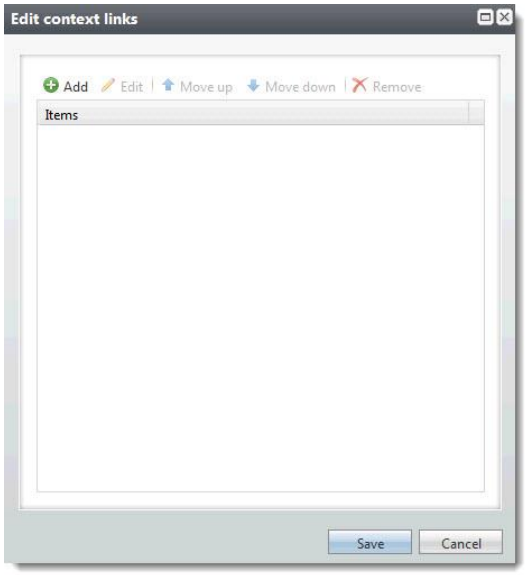
- Link label
- Label Resource key
- Link visibility
- Value
- Caption Resource key
- Page information

In addition to changing the existing context link, you can add and delete links using the **Edit Context Links** button. After you make your changes and click **Save** on the properties screen, the changes appear on the page.

Edit context links for a page

1. On the page to change in **Design Mode**, click **Edit Context Links**. A screen appears with the page's existing context links.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. To delete a link, select the link to delete and click **Remove**.
3. To edit properties of an existing link, select the link and click **Edit**.

Note: For information about these options, see Context Link Properties on page 17.

4. To add a new link, click **Add**.
5. Click **Save** to save the context link and return to the page.

Context Link Properties

The **Properties** box for context links houses the elements that define the link, including the page to link to.

Screen Item	Description
Label	Name of the link to appear at the top of the page.
Label Resource Key	Resource key used to localize the label.
Visible	Visibility status of the link: False = not visible; True = visible.
Value	Caption or expression, if any, included with the link.
CaptionResourceFile	Identifies the resource file containing the strings required for localization.
ContextID	ID of the field used as a parent-level page context record ID or expression.
Page	The page the link takes the user to. To access a list of available pages, select "Browse" in the drop-down menu in the **Page** field. A search screen appears. To view a list of all pages available, click **Search**. A list of pages appears with a brief description. If you know the name or part

Screen Item	Description
	of the name of the page, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the page, select it and click **Select**. You return to the properties screen.

View XML

The **View XML** button included in **Design Mode** displays the full XML of the page without forcing you to first save it to a file. This button is activated even on pages, functional areas, and tasks that do not allow customization, allowing you to still view the XML and see how the area is implemented.

View XML

1. From the action bar at the top of the page, click **View XML**. The XML appears in a separate window.
2. To save the XML as a file, click **Save As**. The Save As screen appears.
   a. In the **Save in** field, enter the location in which you want to save the file.
   b. Enter an XML **File name**.
   c. In the **Save as type** field, confirm "XML files" is selected.
   d. Click **Save**.
3. To copy the contents of the screen to the clipboard to paste into an outside application, such as Notepad, click **Copy to clipboard**. You can then open the outside application and copy the XML.
4. To close the XML display, click the "X" in the upper right-hand corner of the screen.

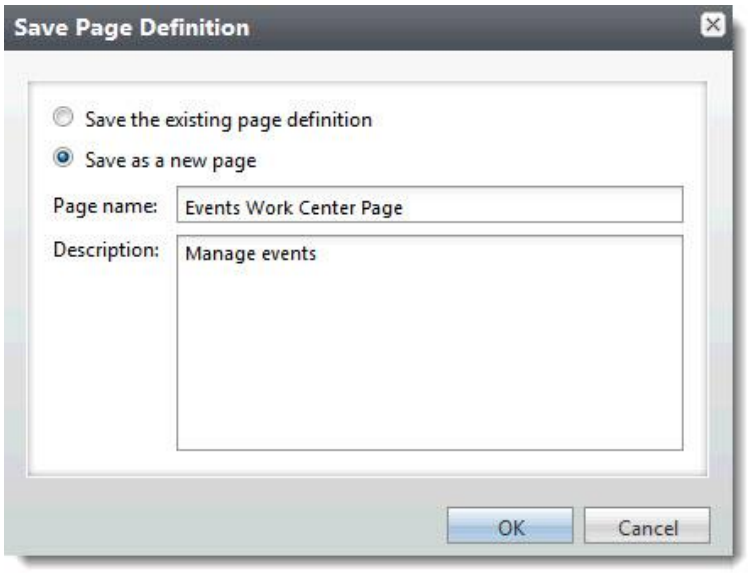
Save Page

The **Save Page** button included in **Design Mode** saves your new or edited page in XML format to a specified location. You can use the saved pages in other areas of the program, replacing existing pages.

Save page settings

1. In the **Design Mode**, from the page you just created or edited, click **Save Page**. The Save Page Definition screen appears.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



Every catalog item in the database has a globally unique identifier (GUID), which you must consider when saving your new page. If you save a page file using the same GUID as an existing item, when you upload this page into the program, you overwrite the existing file, regardless of the file name.

2. If you DO NOT want to change the GUID associated with the page file, simply enter a **Filename** for the new page.
    a. Click the folder icon at the end of the field to access the Save as screen.
    b. From this screen, you can map to the location to store your new page. You can also enter a file name.
    c. Click **Save** to return to the Save Page Definition screen.
    d. Click **OK** to save the page to the selected location.
3. If you DO want to change the GUID associated with the page file, after entering a unique **Filename**, select **Save as a new page** and complete the following steps. Assigning the new GUID allows you to upload the page into the system and not overwrite the existing page.
    a. In the **Page name** field, enter a name for you new page. This name must differ from the name displayed in the **Filename** field.
    b. In the **Description** field, enter a description to help users to identify the new page.
    c. Click **OK**.

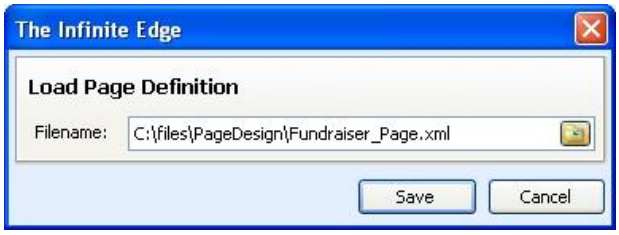
Load Page

You can upload new pages into the program. The **Load Page** option available in **Design Mode** uploads a saved XML page. You can upload program pages you edited and saved and even XML pages you created outside of the program.

▸ Load a new page into the program

1. While in **Design Mode**, from the area to load the new page, click **Load Page**. The Load Page Definition screen appears.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. In the **Filename** field, enter the file name and location of the page to load.
   a. Click the folder icon at the end of the field to access the Open screen.
   b. From this screen, you can map to the location in which your page is stored.
   c. Select the page file, and click **Open**.
3. From the Load Page Definition screen, select **Save**. Your new page appears in the program.

Section-Level Design Mode Features

Two section options are available in the program: Summary Section and Section. For information about these sections, see Program Components on page 1.

Section-level design features appear when you set the program to **Design Mode**. In **Design Mode** you can create new sections or edit the appearance of existing sections in the program. From a selected section, you can delete the section, edit section properties and actions, and assign permissions.

Edit Section Properties

Sections are contained within tabs and are editable.

Note: For information about what constitutes a page section, see Sections on page 3.

The following items can be added or changed from the section properties screen:

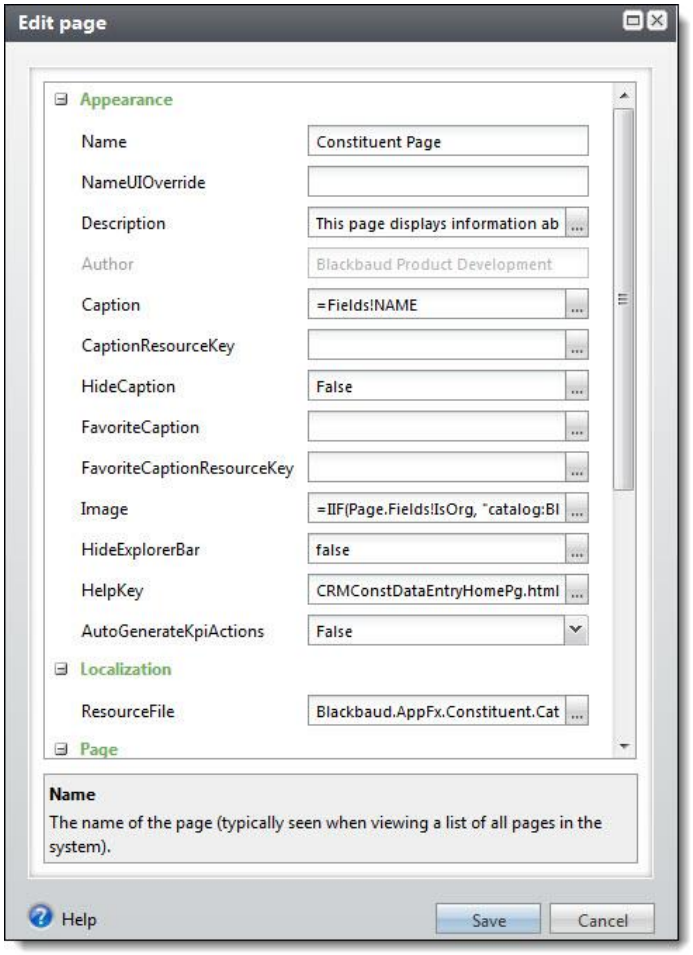
- Caption used to identify the section
- Caption resource file used for localization
- Caption visibility
- Section visibility
- Help documents associated with the section
- Section type
- Actions included in the section

After you make your changes and save the section properties, the changes appear on the section.

Edit properties for a section

1. With the program set in **Design Mode**, click the **Properties** button in the page section to edit. For example, to edit the **Phone numbers** section on the Contact tab in a constituent record, click the **Properties** button in the **Phone numbers** section. A screen appears with the sections's existing property settings.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. Enter your changes. For more information about the options on this screen, see Section Property Screen on page 21.
3. Click **Save**. You return to the page section.

Section Property Screen

The section properties screen appears when you click the **Properties** button on the page section, or you click the ellipsis in the **Section** field on the tab properties screen.

Note: For more information about the Tab properties screen see, Tab Properties on page 14.

Screen Item	Description
Caption	Name used to identify the section.
CaptionResourceKey	Identifies the resource file containing the strings required for localization.
HideCaption	Status of the caption: False = not visible; True = visible.
Visible	Visibility status of section: False = not visible; True = visible.
HelpKey	Location and file name of the document containing help information

Screen Item	Description
	related to this section. Users can then access the help document by clicking the **Help** icon. If you store the file in the program's standard help directory, drive:\Infinity\Help, you do not have to enter the location information, just the file name.
SectionType	Defines the type of information displayed in the section. Based on your selection in this field, another frame appears on the properties grid, allowing you to define the **SectionType**. For example, if you select "Report," a **Report** frame appears, displaying fields specific to the "Report" **SectionType**. For information about each **SectionType** and its definition properties, see Define a Section Type on page 62.
Actions	Define any actions (**Add**, **Delete**, **Refresh**) to include in this section. Click the ellipsis button at the end of the field to access the Actions screen. For more information about how to create actions, see Define Actions on page 81.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.

Edit Action Properties

You can edit section-level action properties. In page sections, the most common actions are **Add**, **Delete**, **Edit**, **Refresh**.

From the page section action properties screen, you can change the following:

- Caption identifying the action
- Caption resource file used for localization
- Image associated with the action
- Chose to show the action on the toolbar
- Set a default action
- Enable and disable the action
- Mark the action visable or invisible
- Add or remove a separator
- Add or remove a tool tip
- Associate the action with a help key
- Change the ActionType
- Select a dataform
- Define a post-action event

Note: For information about actions, see Actions on page 3; for information about page sections, see Sections on page 3.

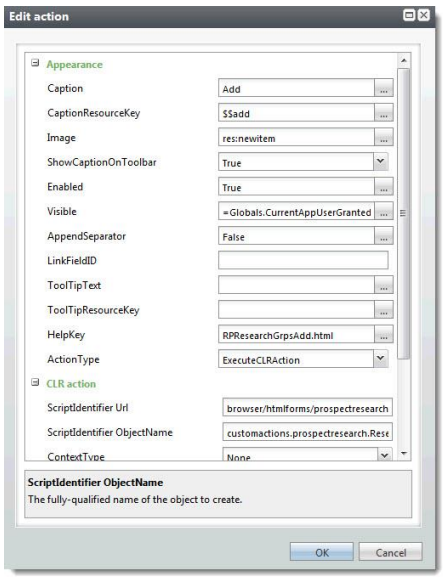
After you make your changes and save the section action properties, the changes appear on the section action.

Edit section action properties

1. With the program set in **Design Mode**, click the **Edit Actions** button in the page section. The Edit section actions screen appears.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.

2. Select the action you want to edit and click **Edit**. The Edit action screen appears.



3. Enter your changes.

   For more information about the options on this screen, see Actions Property Screen on page 23.

4. Click **Save.**

Actions Property Screen

This screen defines section action properties. It appears when you click **Edit Actions** on a page section or you click the ellipsis in the **Actions** field on page section properties screen.

Note: For more information about the page properties screen, see Summary Sections on page 2.

Screen item	Description
Caption	Name of the action (Add, Edit, Delete)
CaptionResourceKey	Identifies the resource file containing the strings required for localization.
Image	Name and icon associated with any selected image.
ShowCaptionToolbar	Is the action caption to be displayed on the toolbar: False = not visible; True = visible
DefaultAction	Is the selected action set as the default action for the section/tab: False = no; True = yes.
Enabled	Is the action enabled in the section: False = not enabled; True = enabled.
Visible	Is the action visible in the section: False = not visible; True = visible.
AppendSeparator	Is a separator appended to the action setting if off from the other actions on the action bar: False = not visible; True = visible.

Screen item	Description
ToolTipText	Text included in the tooltip (if any) associated with the action button. To add an expression, click the ellipsis button at the end of the field. The Expression screen appears.
TooTipResourceKey	Identifies the resource file containing the strings required for localization.
HelpKey	Location and filename of the document containing help information related to this action. Users can then access the help document by clicking the Help icon. If you store the file in the program's standard help directory, you do not have to enter the location information, just the filename.
ActionType	Type of action you want executed when a user clicks the action link/button. The fields available on the properties screen change based on the ActionType selected.
Post-Action Event frame	Event you want executed after the action completes.

Edit Summary Section Properties

You can edit summary section-level properties. Summary sections are not editable by your users and usually appear at the top of a page.

Note: For information about what constitutes a summary section in the program, see Summary Sections on page 2.

The following items can be added or changed from the summary section-level properties screen:

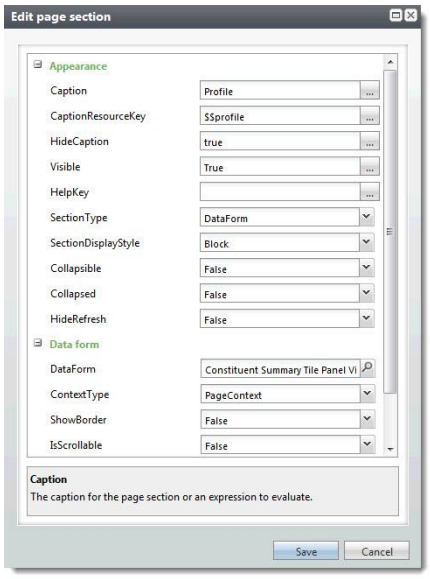
- Caption used to identify the section
- Caption resource file used for localization
- Caption visibility
- Section visibility
- Help documents associated with the section
- Section type
- Actions included in the section

After you make your changes and save the summary section properties, the changes appear on the section.

Edit properties for a summary section

1. With the program set in **Design Mode**, click the **Properties** button in the summary section to edit. For example, to edit the summary section included on the top of a constituent page, from a constituent page, click the **Properties** button that appears in the section when you activate the **Design Mode**. A screen appears displaying the existing section property settings.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. Enter your changes. For more information about the options on this screen, see Summary Section Property Screen on page 25.
3. Click **Save.**

Summary Section Property Screen

This screen defines summary section properties. It appears when you click **Properties** in a summary section, or you click the ellipsis in the **SummarySection** field on a page properties screen.

Note: For more information about the page properties screen, see Page-Level Design Mode Features on page 9.

Screen Item	Description
Caption	Name used to identify the section.
Caption ResourceKey	Identifies the resource file containing the strings required for localization.
HideCaption	Status of the caption: False = not visible; True = visible.
Visible	Visibility status of section: False = not visible; True = visible.
HelpKey	Location and file name of the document containing help information related to this section. Users can then access the help document by clicking the **Help** icon. If you store the file in the program's standard help directory, drive:\ Infinity\Help, you do not have to enter the location information, just the file name.
SectionType	Defines the type of information displayed in the section. Based on your selection in this field, another frame appears on the properties grid, allowing you to define the **SectionType**. For example, if you select "Report," a **Report** frame appears, displaying fields specific to the "Report" **SectionType**. For information about each **SectionType** and its definition properties, see Define a Section Type on page 62.
Actions	Define any actions (**Mark inactive**, **View related constituent, View as**

Screen Item	Description
	prospect) to include in this section. Click the ellipsis button at the end of the field to access the Actions screen. For more information about how to create actions, see Define Action Groups on page 83.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.

Edit Summary Section Action Properties

You can edit actions included in summary sections. In summary sections, actions are links that take users to other areas in the program.

Note: For information about summary section actions, see Actions on page 3. For information about summary sections, see Summary Sections on page 2.

From the summary section action properties screen, you can edit the following areas:

- Caption used to identify the action
- Caption resource file used for localization
- Image associated with the action
- Action displays on the toolbar
- Availability of the action
- Visibility of the action
- Separators used between the actions
- Link fields associate with the action links
- Tooltip text associated with the action
- Tooltip resource file used for localization
- Help key associated with the action
- Action type associated with the action
- Page information

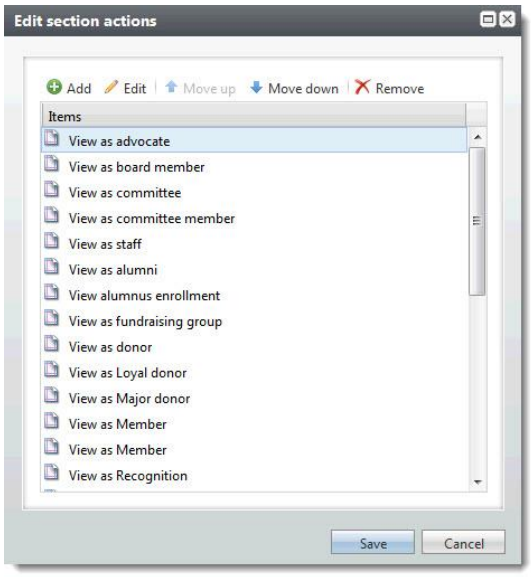
After you make your changes and save the summary section action properties, the changes appear on the summary section.

Edit the summary section action properties

1. With the program set in **Design Mode**, click the **Edit Actions** button in the summary section. For example, to edit the actions in the summary section on top of a constituent page, click the **Edit Actions** button that appears in the section when you activate the **Design Mode**. A screen appears with properties for the existing actions.

Note: You can also access this screen by clicking the ellipsis button at the end of the **Action** field on the summary section properties screen. For more information, see Edit Summary Section Properties on page 24.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



2. To delete an action, select the action to delete and click **Remove**.
3. To edit properties of an existing action, select the action and click **Edit**. A new screen appears. Enter the necessary information.

Note: For information about the options, see Summary Section Actions Property Screen on page 27

4. To add a new action, click **Add** and enter the necessary information.
5. Click **Save**.

Summary Section Actions Property Screen

This screen defines summary section action properties. It appears when you click **Edit Actions** in a summary section of a page, or you click the ellipsis in the **Actions** field on the summary section properties screen.

Note: For more information about the summary section properties screen, see Edit Summary Section Properties on page 24.

Screen Item	Description
Caption	Name of the action (**View Related Constituent**, **View as Board Member, View as Relation**).
CaptionResourceKey	Identifies the resource file containing the strings required for localization.
Image	Name and icon associated with the action. For information about how to select images, see Select Images on page 60.
ShowCaptionOnToolbar	Is the action caption displayed on the toolbar: False = not displayed; True = displayed.
Enabled	Is the action enabled in the section: False = not enabled; True = enabled.
Visible	Is the action visible in the section: False = not visible; True = visible.
AppendSeparator	Is a separator appended to the action, setting it off from other actions on the action bar: False = not visable; True = visable.

Screen Item	Description
LinkField	Field to take the user to from the link that appears in the summary section. For example, the **View as board member** link that appears on a constituent record if the constituent is also a board member links to the constituent's board member data. The **LinkField** is "BOARDMEMBERCONSTITUENT."
ToolTipText	Displays the text included in the tooltip (if any) associated with the action link. To add an expression, click the ellipsis button at the end of the field. The Expression screen appears.
ToolTipResourceKey	Identifies the resource file containing the strings required for localization.
HelpKey	Location and file name of the document containing help information related to this section. Users can then access the help document by clicking the **Help** icon. If you store the file in the program's standard help directory, drive:\ Infinity\Help, you do not have to enter the location information, just the file name.
ActionType	Type of action to execute when a user clicks the action link. The fields available on the properties screen change based on the **ActionType**. For information about **ActionTypes**, see Define ActionTypes on page 72.
Page	Name of the page on which the actions appear.
Tab	Default tab for the page (if tabs are included in the page design). If no tab is selected, the first tab listed serves as the default.
ContextType	Identifies the action ContextType. A "PageContext" is used in most situations. You can also select "None," or a "PageExpressionField," "Expression," "SectionField," or "SearchListReturnValue." For information about context types, see Select ContextType on page 93.
PageExpressionField	If "PageExpressionField" is selected in the **ContextType** field, this field displays the PageExpressionField used.
Expression	If "Expression" is selected in the **ContextType** field, this field displays the Expression used. For more information, see Use Expressions In Design Mode on page 59.
SectionField	If "SectionField" is selected in the **ContextType** field, this field displays the SectionField used. This is a field in the section to use as the context ID.
SearchListReturnValue	If "SearchListReturnValue" is selected in the **ContextType** field, this field displays the SearchListReturnValue used. The search list locates the record to use as the action's context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.
Source	If you enter an **IDMapper**, the **Source** field appears. Enter the ID to use as the source ID to the IDMapper.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.

Shell Design

Open Shell Design **30**

Functional Area Management **31**

Task Management **36**

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User-Defined Smart Queries Management **54**

Ad-hoc Query Reports Management **56**

Shell Design houses the functional areas, tasks, pages, search lists, and user-defined datalists used in the program. You can also add, edit, and delete ad-hoc query **reports** from **Shell Design**.

- **Functional Areas**: Areas in the program that house a series of related functions. For example, *Administration* is a functional area, housing all of the tasks necessary to configure the software: security tasks, application tasks, marketing tasks. All tasks included on the Tasks tab are arranged based on the functional area to which the task is assigned. All functional areas included in the program display on the program's action bar. For more information, see Functional Area Management on page 31.

Note: Only functional area functions for which the user has permission granted appear. If the user has permission to no functions in a functional area, the functional area does not appear.

- **Tasks**: Operations preformed in the program. For example, searching for a constituent record is a task; properties defining the constituent Search screen are accessed from the Tasks tab. Adding an event is a task; properties defining the Add event screen are accessed from the Tasks tab.

For more information, see Task Management on page 36.

- **Pages**: House operations related to a specific record type. For example, the Constituent page houses all operations you can preform on a constituent record: add, edit, delete. The event page houses all operations you can preform on an event: add registrants, edit expenses, etc. For more information, see Page Management on page 43.
- **Search Lists**: Search lists included in the program support optional output columns and filters. For example, the standard constituent search list in the program does not allow you to filter searches based on "Class of" information. However, the ability to filter based on this information may be very important to educational institutions. With the Edit settings option on the Search Lists tab, you can edit the standard Constituent search settings to allow for "Class of" filtering.
- **User-defined Datalists**: Datalists are a fundamental component in the application design. For examples, the Constituent Address List, the Ad-hoc query list, the System Role List, the Constituent Giving History list, are all fairly common to designers working in the program. In addition to the long list of Datalists included with the

program, you can easily add Datalists to the catalog that can then be used to define new pages or edit existing pages. For more information, see User-Defined Datalist Management on page 51.

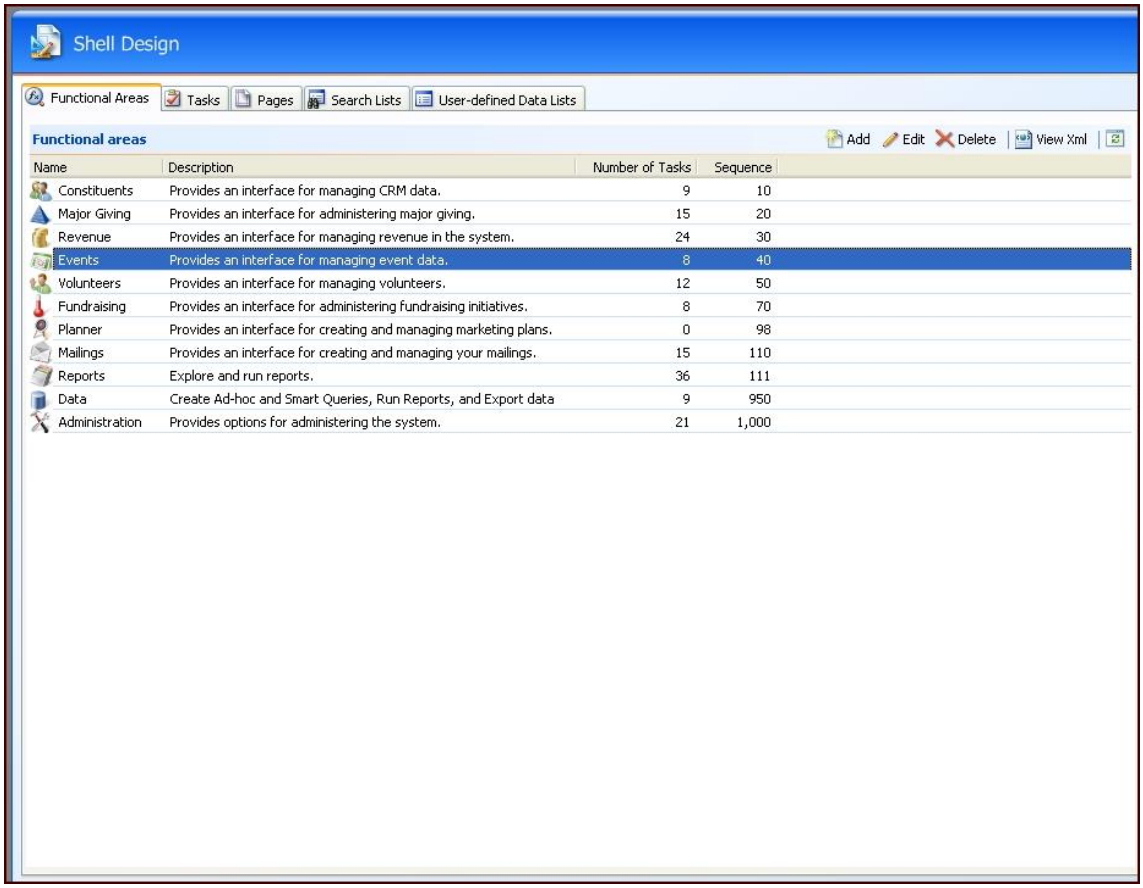
- **Ad-hoc Query Reports**: You can create ad-hoc query reports based on ad-hoc queries you previously added in *Query*. You can add, edit, and delete ad-hoc query reports from the Ad-hoc Query Reports tab of the Shell Design page in *Administration*. For more information, see Ad-hoc Query Reports Management on page 56.

Open Shell Design

The **Shell Design** functionality is accessed through *Administration*.

Open the Shell Design functionality

1. On the action bar, click **Administration**. The Administration page appears.
2. In the **Application** section, click **Shell Design**. The Shell Design page appears, displaying the Functional areas tab.



3. Select the tab to work on:
   - For information about the Functional areas tab, see Functional Area Management on page 31.
   - For information about the Tasks tab, see Task Management on page 36.
   - For information about the Pages tab, see Page Management on page 43.

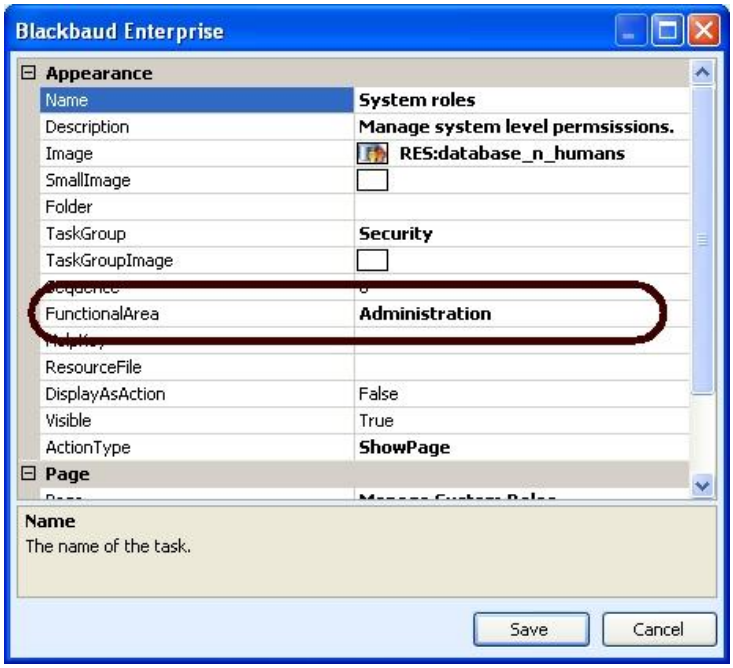
- For information about the User-defined datalists tab, see User-Defined Datalist Management on page 51.

Functional Area Management

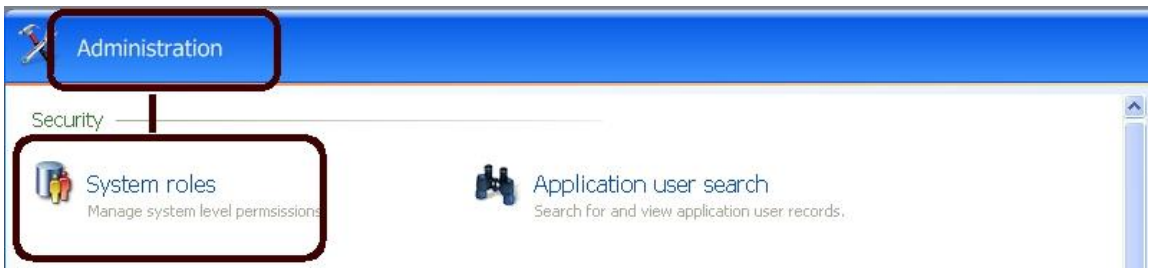
The Functional areas tab in **Shell Design** displays all existing functional areas in the program. From this tab, you can **Add**, **Edit**, **Delete**, and **View XML** for functional areas. After you create a functional area, you can assign tasks to the area from the Tasks tab.

Note: The *Events*, *Prospects*, and *Membership* areas are built as pages in ***Blackbaud CRM*** instead of functional areas. While you cannot assign tasks to pages, pages can have actions. Most tasks are available as actions, except for BrowseQueryResults and RunBusinessProcess. In addition, you can take advantage of the actions ActionGroup, ExecuteCustomSectionMethod, and InvokeSectionModelAction, which are not available as tasks. For more information about adding actions, see Actions on page 3.

For example, in the program, the System roles task, which manages system-level permissions, is assigned to the "Administration" FunctionalArea on the System roles properties screen accessed from the Tasks tab.



Therefore, the **System roles** task resides in the *Administration* functional area in the program.



Add Functional Areas

From the Functional areas tab in **Shell Design**, you can add functional areas to the program. For example, rather than have users navigate to *Events* to access the Events calendar, you want to add an Events Calendar functional area to the program's action bar. Then users simply have to click the **Events Calendar** action bar link to open the calendar.

To accomplish this, you create the "Events Calendar" functional area on the Functional areas tab then you add the Events Calendar task and assign it to the Events Calendar functional area from the Tasks tab.

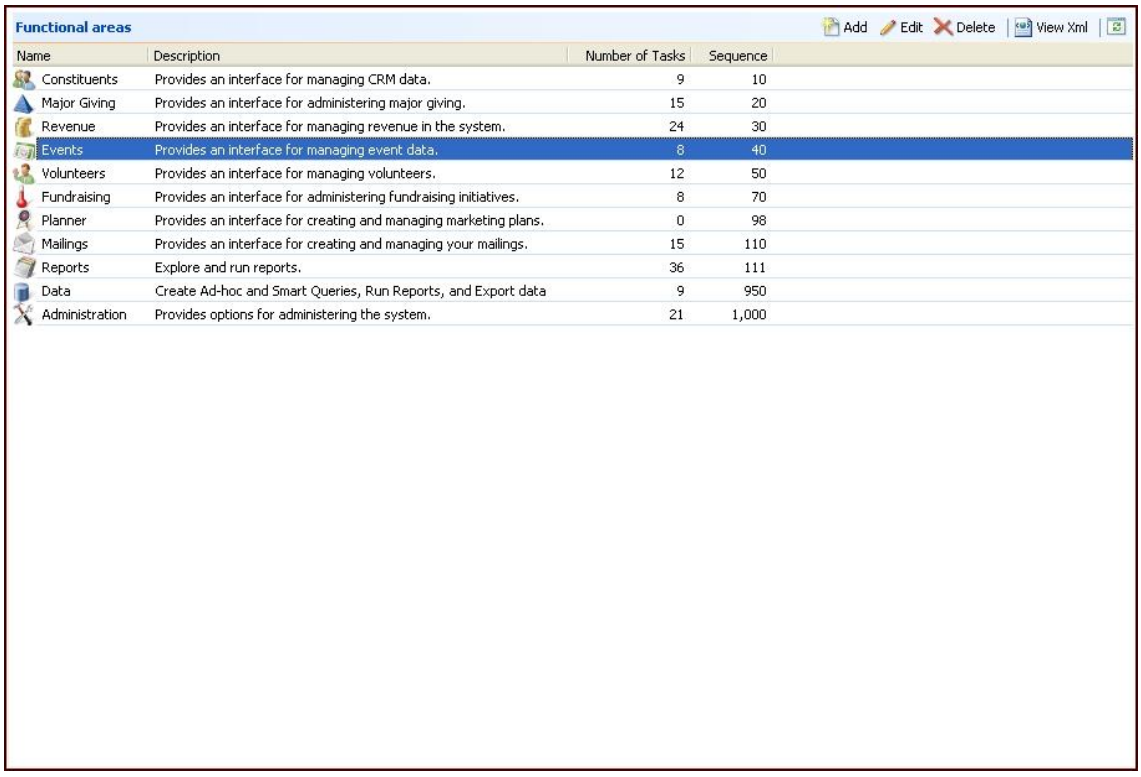
For information about creating the task, see Task Management on page 36.

Note: Before a newly added functional area is available for navigation, you must add at least one tasks to the new functional area.

Add a functional area to the program

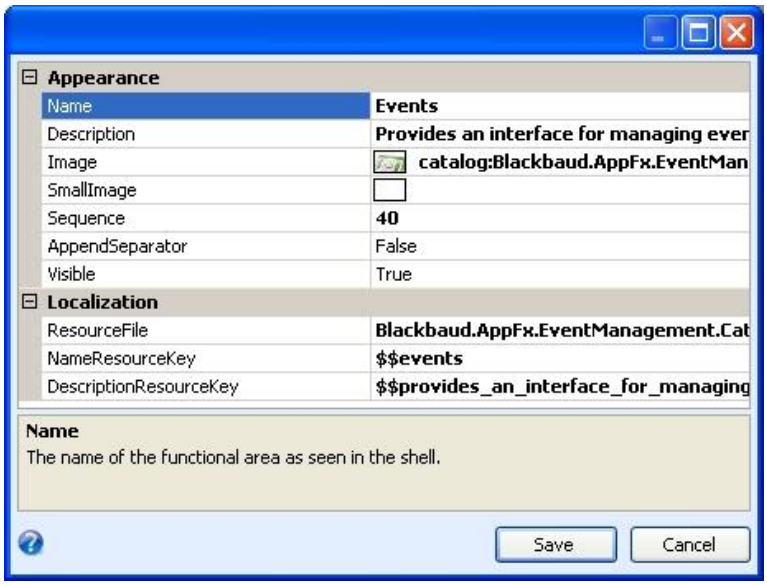
1. From the Shell Design page, select the Functional areas tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.



Name	Description	Number of Tasks	Sequence
Constituents	Provides an interface for managing CRM data.	9	10
Major Giving	Provides an interface for administering major giving.	15	20
Revenue	Provides an interface for managing revenue in the system.	24	30
Events	Provides an interface for managing event data.	8	40
Volunteers	Provides an interface for managing volunteers.	12	50
Fundraising	Provides an interface for administering fundraising initiatives.	8	70
Planner	Provides an interface for creating and managing marketing plans.	0	98
Mailings	Provides an interface for creating and managing your mailings.	15	110
Reports	Explore and run reports.	36	111
Data	Create Ad-hoc and Smart Queries, Run Reports, and Export data	9	950
Administration	Provides options for administering the system.	21	1,000

2. Click **Add**. A blank properties screen for functional area appears.
3. Complete the necessary fields. For information about the fields on this screen, see Add Functional Area Properties Screen on page 33.



4. Click **Save**. You return to the Shell Design page.

Add Functional Area Properties Screen

You define your new functional area on this screen, accessed by clicking **Add** on the Functional areas tab in **Shell Design**.

Screen Item	Description
Name	Name of the functional area. The name you enter appears in the **Name** column on the Functional areas tab and the **FunctionalArea** field of the tasks property screen (accessed from the Tasks tab), where you to assign tasks to the area.
Description	Describes the Functional area. It appears in the **Description** column of the Functional areas tab.
Image	Name and icon associated with the action. For information about how to select images, see Select Images on page 60.
SmallImage	Smaller image (if any) associated with the functional area/task. Wherever applicable (such as on the functional area toolbar drop-down menus and system menus), the system uses the small image if present. If no small image is present, the system defaults to the selected **Image**. The small image allows the system to tune smaller images for a better display, rather than scaling the larger **Image**.
Sequence	Where the new area appears in the list of functional areas on the tab. For example, to place the new area at the top of the list, enter “0.” Sequence number do not have to be unique. If a number is used for multiple functional areas, the program determines order alphabetically based on the **Name**.
AppendSeparator	Status of separator appended to the area, setting it off from other areas on the page: False = not visible; True = visible.
Visible	Is the functional area visible: False = not visible; True = visible
ResourceFile	Identifies the resource file containing the strings required for localization.
NameResourceKey	Appears if you add a **ResourceFile**. Identifies the resource key containing the localized functional area **Name**.

Screen Item	Description
Description ResourceKey	Appears if you add a **ResourceFile**. Identifies the resource file containing the localization functional area **Description**.

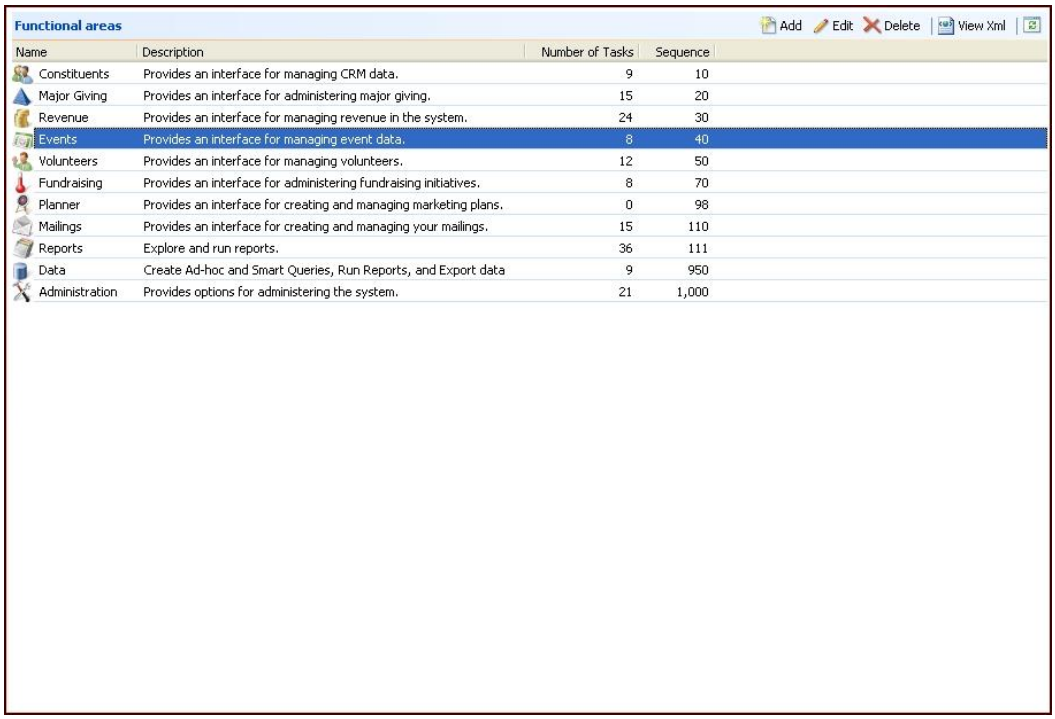
Edit Functional Area

From the Functional areas tab in **Shell Design**, you can edit any existing functional areas used in the program. For example, you may want to change the name and description used to identify an area.

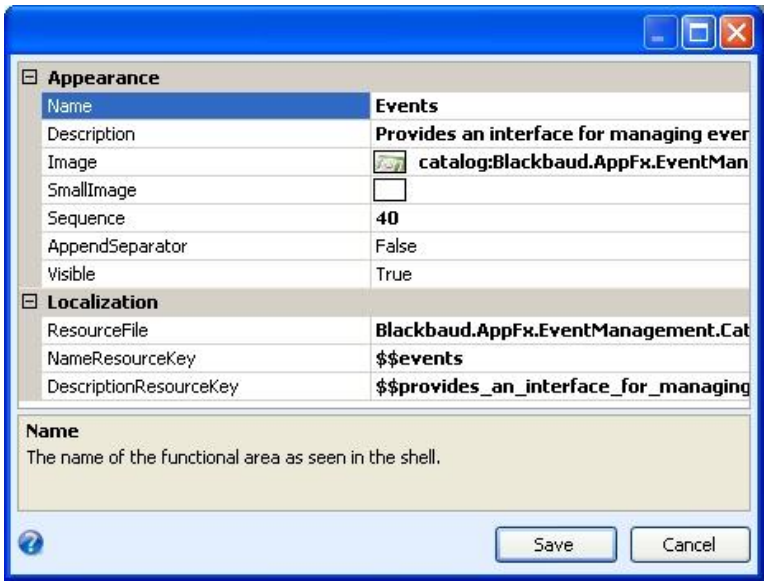
Edit a functional area to the program

1. From the Shell Design page, select the Functional areas tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.



2. Select a functional area and click **Edit**. A properties screen appears.



3. Complete the necessary fields.

   The items on this screen are the same as those on the Add functional area properties screen. For information, see Add Functional Area Properties Screen on page 33.

4. Click **Save**. You return to the Shell Design page.

Delete Functional Area

From the Functional areas tab in **Shell Design**, you can delete any existing functional areas not used in the program.

Delete a functional area from the program

1. From the Shell Design page, select the Functional areas tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Select the functional area to remove.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to remove the functional area and return to the Shell Design page.

View XML

The **View XML** button included at the top of the Functional Areas tab in **Shell Design** displays the full XML of the page without forcing you to first save it to a file. This button is activated even for functional areas that do not allow customization, allowing you to still view the XML and see how the area is implemented.

View XML

1. From the action bar at the top of the page, click **View XML**. The XML appears in a separate window.
2. To save the XML as a file, click **Save As**. The Save As screen appears.
   a. In the **Save in** field, enter the location in which you want to save the file.

b. Enter an XML **File name**.

c. In the **Save as type** field, confirm "XML files" is selected.

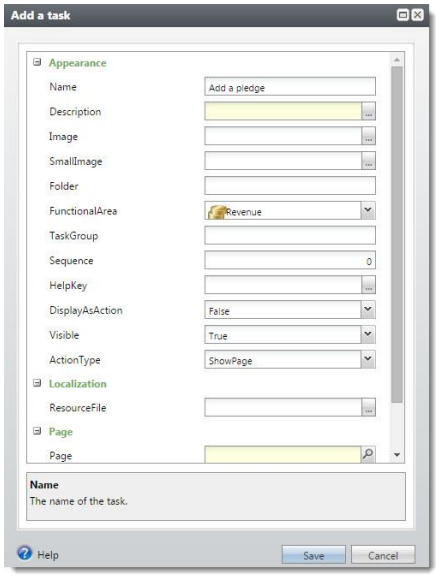
d. Click **Save**.

3. To copy the contents of the screen to the clipboard to paste into an outside application, such as Notepad, click **Copy to clipboard**. You can then open the outside application and copy the XML.
4. To close the XML display, click the "X" in the upper right-hand corner of the screen.

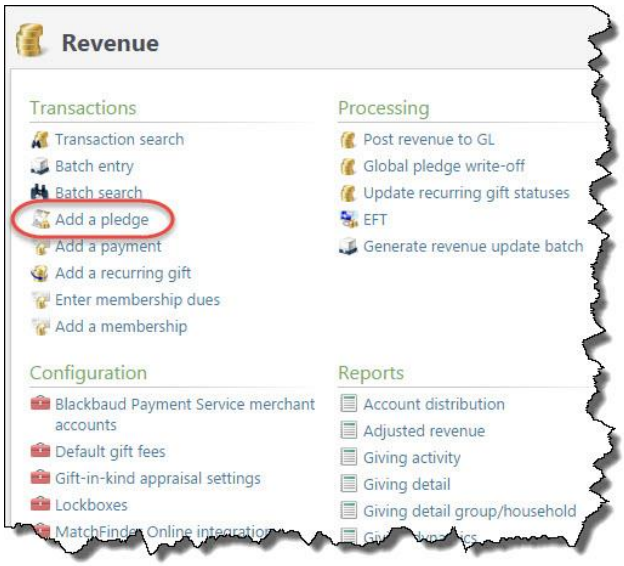
Task Management

The Tasks tab in **Shell Design** displays all existing tasks in the program. From this tab, you can **Add**, **Edit**, **Delete**, and **View XML**. You can also assign permissions to a task and test the task. When you create a task, you can assign it to a functional area. Users then access the new task through the assigned functional area.

For example, in the program, the "Add a pledge" task is assigned to the "Revenue" **FunctionalArea** on the Add a pledge properties screen accessed from the Tasks tab.



Therefore, the **Add a pledge** task resides in the *Revenue* functional area in the program.



Add Tasks

You can add tasks to the program. For example, rather than have users navigate to *Events* to access the Events calendar, you can add an Events Calendar functional area to the program's action bar. Then users simply have to click the Events Calendar action bar link to open the calendar.

To accomplish this, you first create the "Events Calendar" functional area on the Functional areas tab then you add the Events Calendar task and assign it to the Events Calendar functional area from the Tasks tab.

For information about how to create the functional area, see Add Functional Areas on page 32.

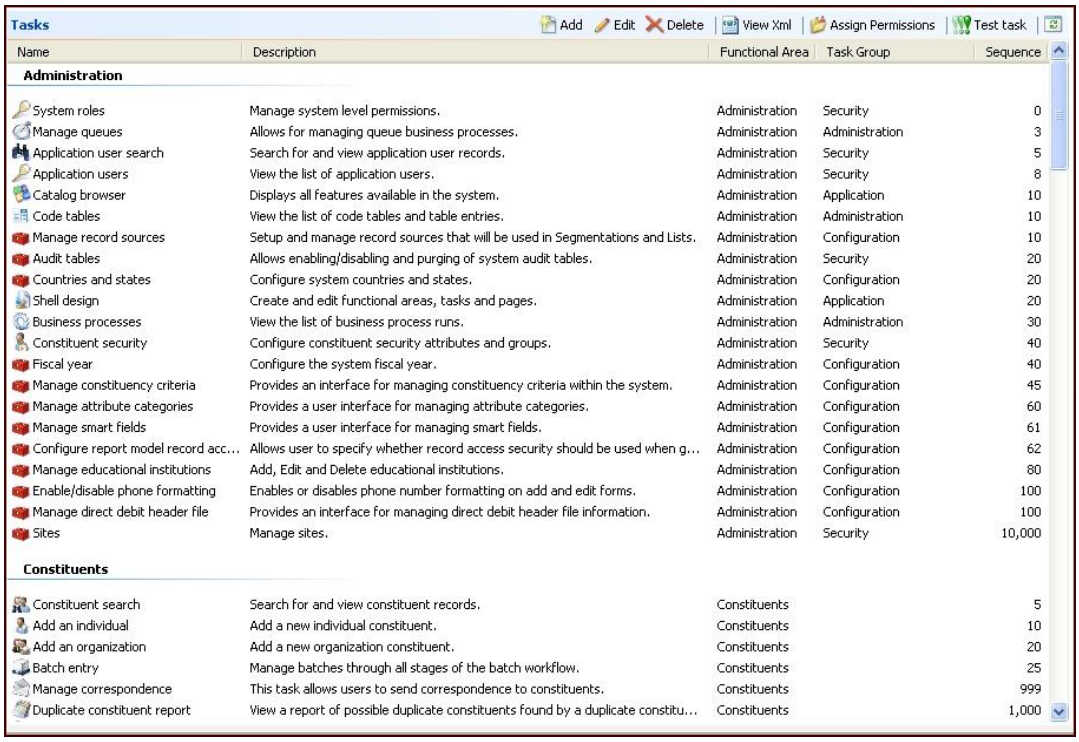
Another useful option is to edit search tasks and set FormFieldOverrides for search screens. For example, for the Constituent Search form, you can choose to set overrides to always include inactive constituents or deceased constituents in the search.

Note: For example, the Constituent Search form is sticky and remembers the options a user selects, so the same settings are applied the next time the user searches for a constituent. However, if you have FormFieldOverrides on the Constituent Search form, the overrides will always occur for the search regardless of the user's last search settings.

Add a task to the program

1. From the Shell Design page, select the Tasks tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.



Name	Description	Functional Area	Task Group	Sequence
Administration				
System roles	Manage system level permissions.	Administration	Security	0
Manage queues	Allows for managing queue business processes.	Administration	Administration	3
Application user search	Search for and view application user records.	Administration	Security	5
Application users	View the list of application users.	Administration	Security	8
Catalog browser	Displays all features available in the system.	Administration	Application	10
Code tables	View the list of code tables and table entries.	Administration	Administration	10
Manage record sources	Setup and manage record sources that will be used in Segmentations and Lists.	Administration	Configuration	10
Audit tables	Allows enabling/disabling and purging of system audit tables.	Administration	Security	20
Countries and states	Configure system countries and states.	Administration	Configuration	20
Shell design	Create and edit functional areas, tasks and pages.	Administration	Application	20
Business processes	View the list of business process runs.	Administration	Administration	30
Constituent security	Configure constituent security attributes and groups.	Administration	Security	40
Fiscal year	Configure the system fiscal year.	Administration	Configuration	40
Manage constituency criteria	Provides an interface for managing constituency criteria within the system.	Administration	Configuration	45
Manage attribute categories	Provides a user interface for managing attribute categories.	Administration	Configuration	60
Manage smart fields	Provides a user interface for managing smart fields.	Administration	Configuration	61
Configure report model record acc...	Allows user to specify whether record access security should be used when g...	Administration	Configuration	62
Manage educational institutions	Add, Edit and Delete educational institutions.	Administration	Configuration	80
Enable/disable phone formatting	Enables or disables phone number formatting on add and edit forms.	Administration	Configuration	100
Manage direct debit header file	Provides an interface for managing direct debit header file information.	Administration	Configuration	100
Sites	Manage sites.	Administration	Security	10,000
Constituents				
Constituent search	Search for and view constituent records.	Constituents		5
Add an individual	Add a new individual constituent.	Constituents		10
Add an organization	Add a new organization constituent.	Constituents		20
Batch entry	Manage batches through all stages of the batch workflow.	Constituents		25
Manage correspondence	This task allows users to send correspondence to constituents.	Constituents		999
Duplicate constituent report	View a report of possible duplicate constituents found by a duplicate constitu...	Constituents		1,000

2. Click **Add**. A blank tasks properties screen appears.
3. Complete the necessary fields.

   For information about the fields on this screen, see Edit Tasks on page 40.
4. Click **Save**. You return to the Shell Design page.

Add Task Properties Screen

If you are creating a task outside of the **Shell Design** feature in *Administration*, a System Roles tab also appears on the properties screen.

Screen Item	Description
Name	Name of the task. The name you enter appears in the Name column on the Tasks tab. This field appears only when you access the properties screen from Shell Design.
Description	Describes the task. It appears in the Description column of the Tasks tab.
Image	Name and icon associated with the task. For a detailed explanation about selecting images, see the Select Images section of the Options chapter in the Page Design Guide.
SmallImages	Smaller image (if any) associated with the task. Where applicable (such as on the task toolbar drop-down menus), the system uses the small image if present. If no small image is present, the system defaults to the selected Image. The small image allows the system to tune smaller images for a better display, rather than scale the larger Image.
Folders	Name of the folder, if any, in which the task is stored in the functional area. For example, there may be a number of Administration tasks only

Screen Item	Description
	your IT manager uses. With this field, you can create an “IT Manager” folder and assign the selected tasks to this folder in the Administration functional area. Once assigned to a folder, the task no longer appears as a standalone task on the functional area page.
FolderImages	Image, if any, associated with the Folder.
TaskGroup	Name of the task group in which the tasks is included (if any). For example, in the functional area Major Giving, there is a Fundraiser task group and a Prospect task group, each group addressing a specific area in Major Giving. Within these groups are a series of tasks, such as add a fundraiser, search for a fundraiser, etc.
TaskGroupImage	Image, if any, associated with the Task Group.
Sequence	Where in the list of tasks included on the tab you want the new task to fall. For example, if you want the new task to appear at the top of the list, enter “0”. Sequence number do not have to be unique. In the case that the same sequence number is used for two or more tasks, the program determines order alphabetically based on the Name.
FunctionalArea	Functional area to which the task is assigned. For information about functional areas, see Functional Area Management section of the Shell Design chapter in the Page Design Guide.
HelpKey	The location and file name of the document containing help information related to this task. Users can then access the help document by clicking the Help icon on the page. If you store the file in the program’s standard help directory, drive:\ Infinitively, you do not have to enter the location information, just the file name.
ResourceFile	Identifies the resource file containing the strings required for localization. The default culture is US; to localize for a different culture, select the resource file containing the localized strings you want extracted from the file.
NameResourceKey	Appears if you add a ResourceFile. Identifies the resource key containing the localized functional area Name.
DescriptionResourceKey	Appears if you add a ResourceFile. Identifies the resource file containing the localized functional area Description.
TaskGroupResourceKey	Identifies the resource file containing the localized TaskGroup name.
DisplayAsAction	Indicates if the task should display as an action.
Append Separator	Appears if you select “True” for DisplayAsAction. Adds a line separator between actions.
Visable	Visibility status of the task: True = visable; False = not visable.
ActionType	The type of action to execute when a users clicks the action link/button. The fields available on the properties screen change based on the ActionType selected. For a detailed explanation of the various ActionTypes, see the Define Action Types section in the Options chapter of the Page Designer Guide.

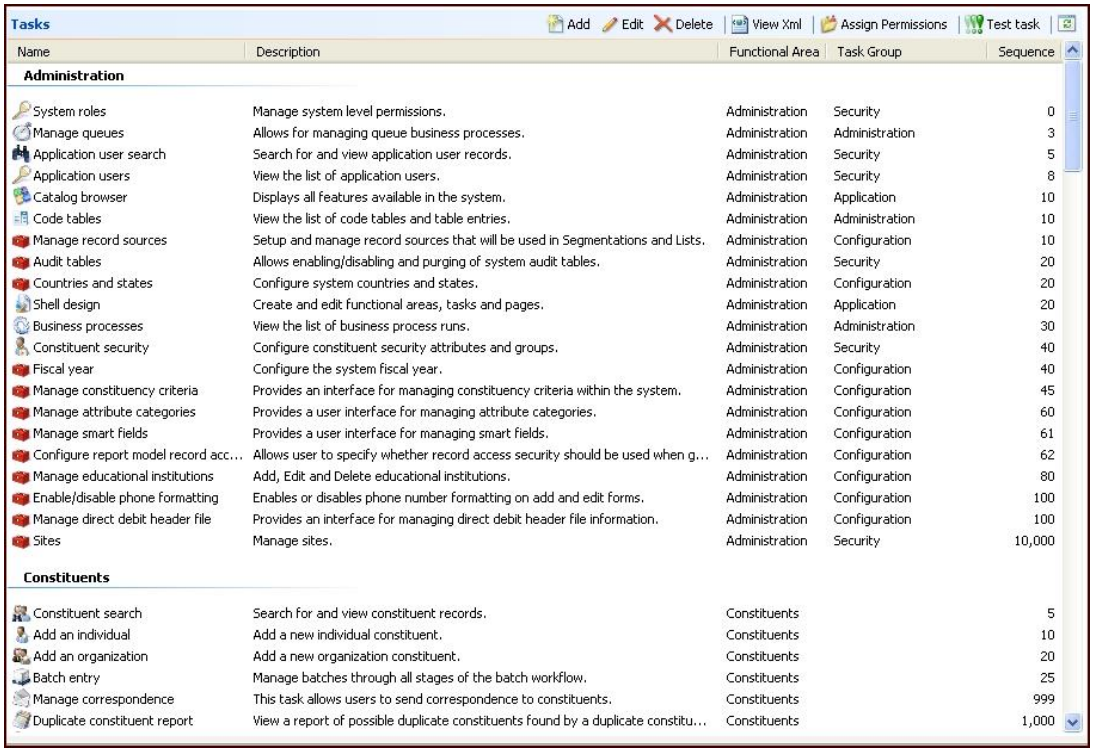
Edit Tasks

From the Tasks tab in **Shell Design**, you can edit any existing task used in the program. For example, you may want to change the name and description used to identify a task, or change the ActionType executed in the task.

Edit a task to the program

1. From the Shell Design page, select the Tasks tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.



Name	Description	Functional Area	Task Group	Sequence
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System roles	Manage system level permissions.	Administration	Security	0
Manage queues	Allows for managing queue business processes.	Administration	Administration	3
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Catalog browser	Displays all features available in the system.	Administration	Application	10
Code tables	View the list of code tables and table entries.	Administration	Administration	10
Manage record sources	Setup and manage record sources that will be used in Segmentations and Lists.	Administration	Configuration	10
Audit tables	Allows enabling/disabling and purging of system audit tables.	Administration	Security	20
Countries and states	Configure system countries and states.	Administration	Configuration	20
Shell design	Create and edit functional areas, tasks and pages.	Administration	Application	20
Business processes	View the list of business process runs.	Administration	Administration	30
Constituent security	Configure constituent security attributes and groups.	Administration	Security	40
Fiscal year	Configure the system fiscal year.	Administration	Configuration	40
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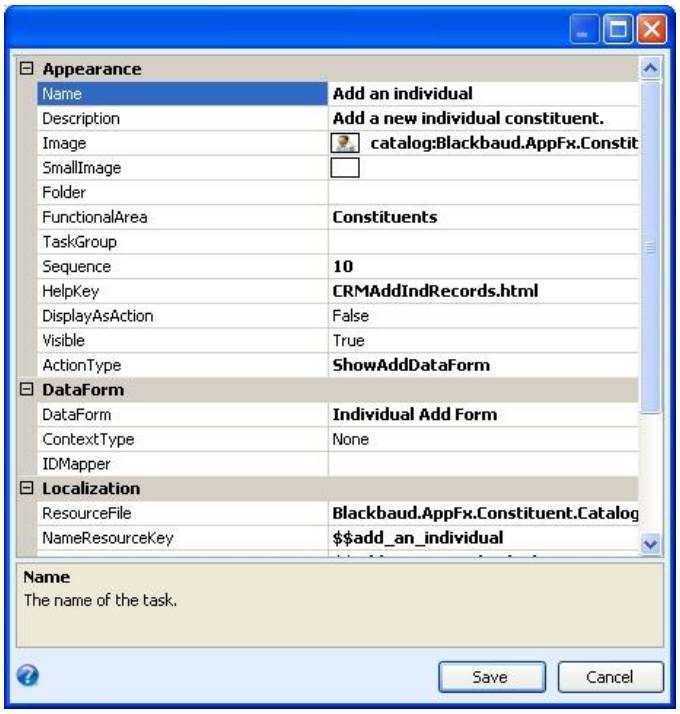
Configure report model record acc...	Allows user to specify whether record access security should be used when g...	Administration	Configuration	62
Manage educational institutions	Add, Edit and Delete educational institutions.	Administration	Configuration	80
Enable/disable phone formatting	Enables or disables phone number formatting on add and edit forms.	Administration	Configuration	100
Manage direct debit header file	Provides an interface for managing direct debit header file information.	Administration	Configuration	100
Sites	Manage sites.	Administration	Security	10,000
Constituents				
Constituent search	Search for and view constituent records.	Constituents		5
Add an individual	Add a new individual constituent.	Constituents		10
Add an organization	Add a new organization constituent.	Constituents		20
Batch entry	Manage batches through all stages of the batch workflow.	Constituents		25
Manage correspondence	This task allows users to send correspondence to constituents.	Constituents		999
Duplicate constituent report	View a report of possible duplicate constituents found by a duplicate constitu...	Constituents		1,000

2. Select a task and click **Edit**. The properties screen appears.



3. Complete the necessary fields.

   The items on this screen are the same as those on the Add task properties screen. For information, see Edit Tasks on page 40.

4. Click **Save**. You return to the Shell Design page.

Delete Tasks

From the Tasks tab in **Shell Design**, you can delete any existing tasks not used in the program.

Note: Instead of deleting a task and removing it from your system, you may want to consider disabling the task's visibility. This preserves the task in your system, but your user cannot access it. For more information, see Edit Tasks on page 40.

Delete a task from the program

1. From the Shell Design page, select the Tasks tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Select the task to remove.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to remove the task and return to the Shell Design page.

View XML

The **View XML** button included at the top of the Tasks tab in **Shell Design** displays the full XML of the task without forcing you to first save it to a file. This button is activated even for tasks that do not allow

customization, allowing you to still view the XML and see how the task is implemented.

View XML

1. From the action bar at the top of the page, click **View XML**. The XML appears in a separate window.
2. To save the XML as a file, click **Save As**. The Save As screen appears.
   a. In the **Save in** field, enter the location in which you want to save the file.
   b. Enter an XML **File name**.
   c. In the **Save as type** field, confirm "XML files" is selected.
   d. Click **Save**.
3. To copy the contents of the screen to the clipboard to paste into an outside application, such as Notepad, click **Copy to clipboard**. You can then open the outside application and copy the XML.
4. To close the XML display, click the "X" in the upper right-hand corner of the screen.

Establish Task Security

You can control which system roles have access to your tasks. For example, you may just want your system administrator to have access to the **Audit Tables** feature in *Administration*. Using the **Assign Permissions** functionality on the Tasks tab in **Shell Design**, you can grant your administrator access to the **Audit Tables** function and deny access to all other system roles.

When a user assigned the specific role opens the program, only tasks for which they are granted permission appear.

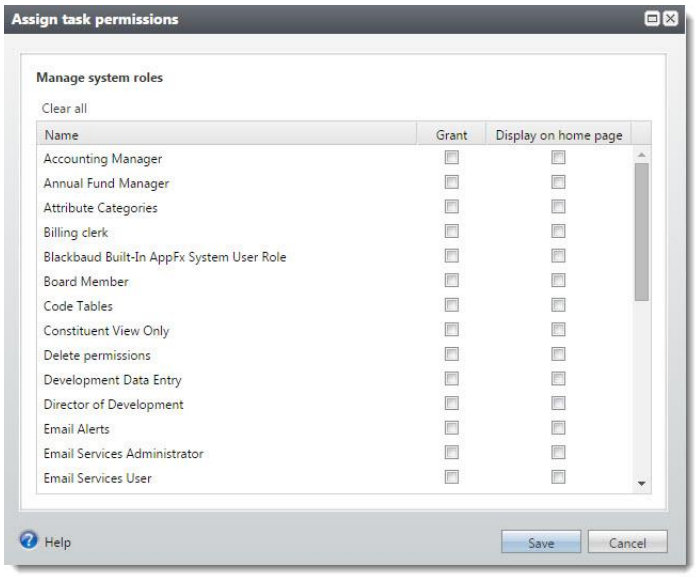
Note: For information about how to manage system roles and establish security, see the *Security Guide*.

Set user permissions

1. From the Shell Design page, select the Tasks tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Select the **Task** to assign permissions.
3. Click the **Assign Permissions** button. The Assign Task Permissions screen appears.



4. To grant a role access, select its **System Roles** checkbox. To deny access, clear the checkbox. To clear all existing assignments, click **Clear All**.
5. Click **Save** to save your assignments and close the Assign Task Permissions screen.

Test Tasks

From the Shell Design page in *Administration*, you can open tasks, testing them before committing the new or edited tasks to your system.

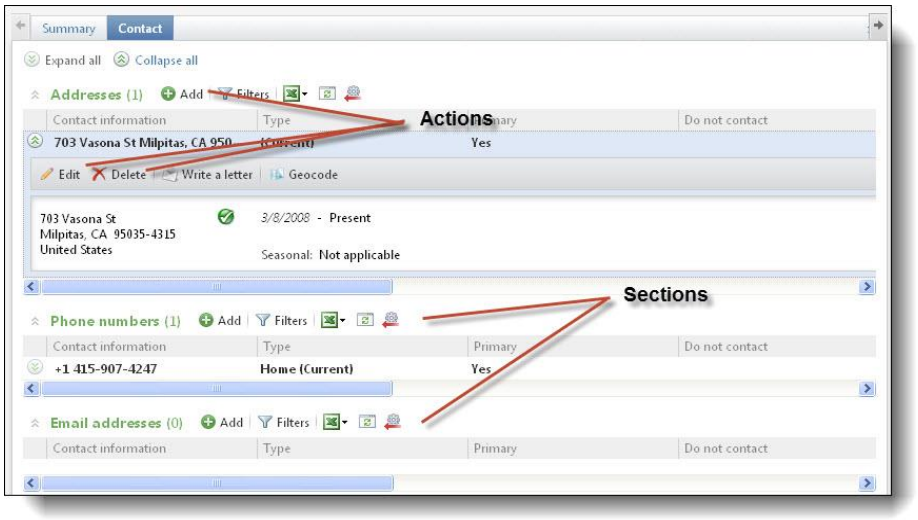
Test program tasks in Shell Design

1. From the Shell Design page, select the Tasks tab.
2. Select the **Task** to test. All available tasks appear in the grid.
3. Click **Test Task**. The task appears. For example, if you select the Add an individual task, the Add individual screen appears.

Page Management

The Pages tab in **Shell Design** displays all existing pages in the program. From this tab, you can **Add**, **Edit**, and **Delete** pages. You can also test your pages, load page definitions, view XML, and assign page permissions.

Pages in the program house related components. For example, the constituent page houses record components related to a constituent, including phone, email, and address information.



Add Pages

From the Pages tab in **Shell Design**, you can add new pages to the program.

For example, your board of directors needs regular access to a handful of up-to-date reports, dashboards, and lists. Using the Functional areas tab, you can create a “Board” area. From the Pages tab, you can create a new page that includes all of the information the board members need, or if there is too much information for a single page, you can create a couple of new pages. Finally, from the Tasks tab, you can create a new task that includes the new page and assign the task to the “Board” functional area.

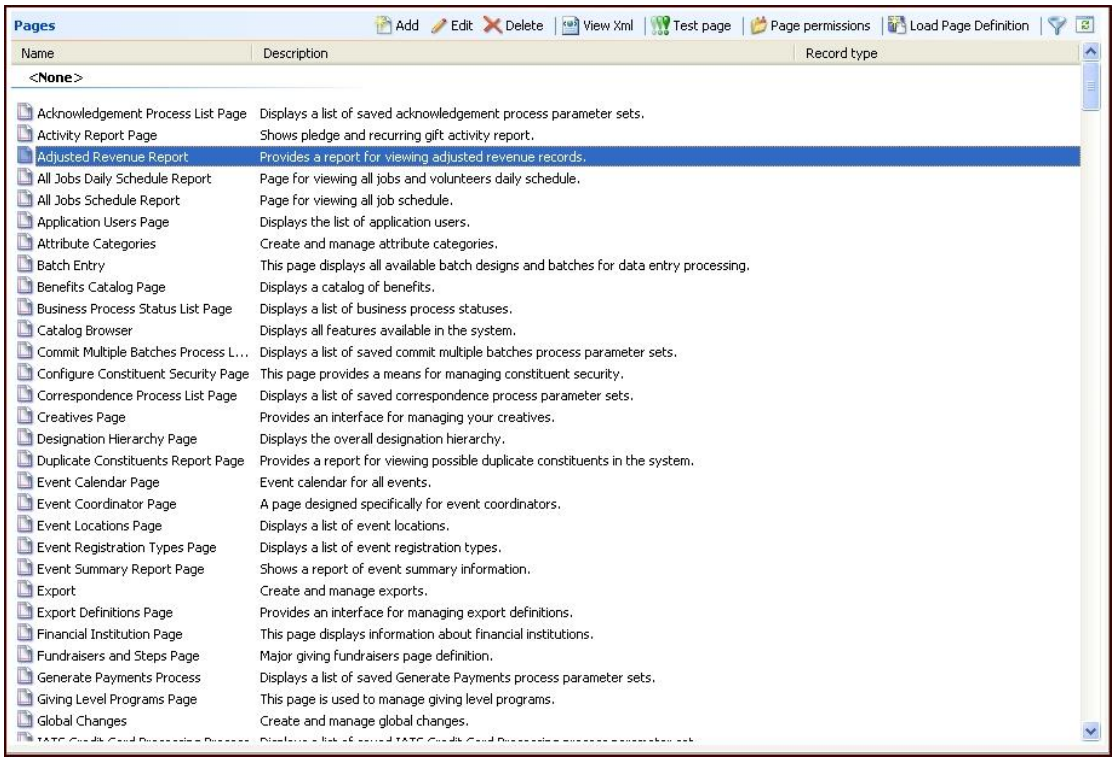
For information about how to create the functional area, see Add Functional Areas on page 32.

For information how to about create tasks, see Add Tasks on page 37.

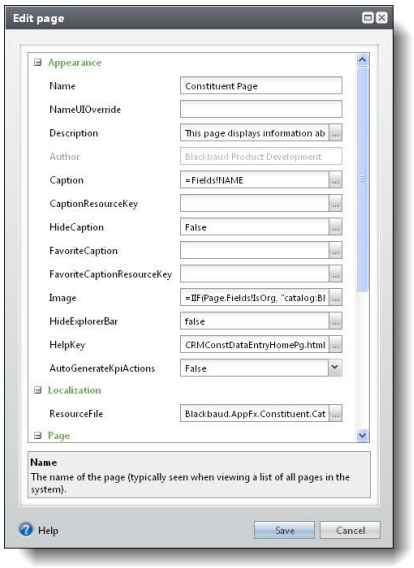
Add a page to the program

1. From the Shell Design page, select the Pages tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.



2. Click **Add**. A blank page properties screen appears.
3. Complete the necessary fields. For information about the fields on this screen, see Add Page Properties Screen on page 45.



4. Click **Save**. You return to the Shell Design page.

Add Page Properties Screen

You define your new page on this screen, accessed by clicking **Add** on the Pages tab in **Shell Design**.

Note: The table below covers the standard property fields that display. Additional fields may appear based on your selection in other fields. For more information about these fields, see Page Designer Options on page 59.

Screen Item	Description
Name	Name of the page. The name you enter appears in the **Name** column on the Pages tab.
Description	Describes the page. It appears in the **Description** column of the pages tab.
Author	Defaults to the system member creating the page.
Caption	Appears at the top of the new page.
Favorite Caption	Appears if you add the page to your Favorites.
CaptionResourceKey	Resource key, if any used to localize the page caption.
Image	Name and icon associated with the page. For information about how to select images, see Select Images on page 60.
HelpKey	The location and file name of the document containing help information related to this page. Users can then access the help document by clicking the **Help** icon on the page. If you store the file in the program's standard help directory (drive:\ Infinity\Help), you do not have to enter the location information, just the file name.
AutoGenerateKpiAction	Automatically generates a key performance indicator (KPI) action. For more information about KPIs, see the *Reports and KPIs Guide*.
ResourceFile	Identifies the resource file containing the strings required for localization. The default culture is US; to localize for a different culture, select the resource file containing the localized strings to extract from the file.
FavoriteCaptionResourceKey	Resource key, if any used to localize the Favorite caption.
RecordType	Displays the context record type. This governs the types of items you can include on this page. For example, if this is a constituent type page, select "Constituent."
ExpressionDataForm	Displays the View Data form to use for expressions on the page.
SummarySections	You can add a summary section to the top of your page. Summary sections are optional. The summary section, defined as a view DataForm, appears at the top of the page and can include hyperlinks (context links) to other ares of the program. For more information, see Edit Summary Section Properties on page 24.
Tabs	Tabs are optional and containers for page sections. If a page houses one tab, the data displays without the tab design. To access the Tabs screen, click the ellipsis at the end of the field. For information about the Tabs screen, see Tab Properties on page 14.
ActionGroups	Action groups are included in the left pane in the program, along with **Tasks** and **Other Information.** To access the Action Groups screen, click the ellipsis at the end for the field. For information about the Action Groups screen, see Action Group Properties Screen on page 16.
ContextLinks	Context links are page level links, providing users easy access

Screen Item	Description
	to other pages associated with the page. For more information, see Context Links on page 5.
Page Navigation Tree frame	A Navigation Tree displays a hierarchical set of links to other pages. For information about this feature, see Define Page Navigation Trees on page 88.

Edit Pages

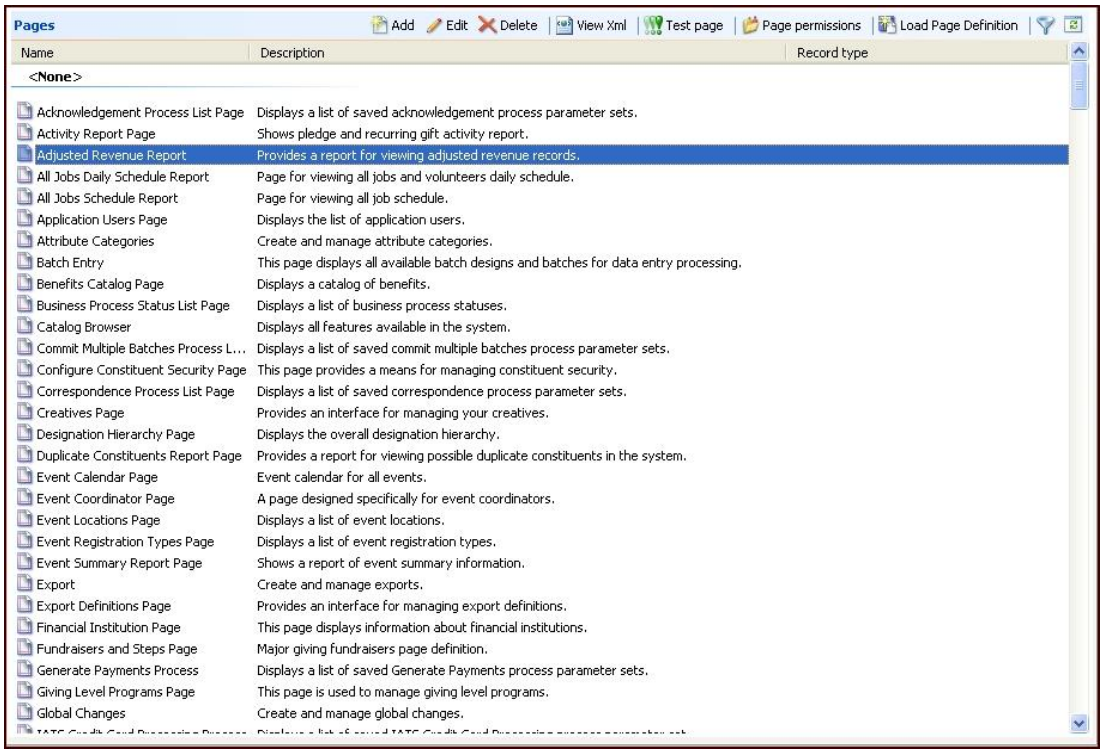
From the Pages tab in **Shell Design**, you can edit existing pages in the program. For example, you may want to change the name of a tab on the Constituent page or add a tab to your Prospect page.

Note: While in **Design Mode**, you can also edit page properties from the page itself, using the Properties button. For more information, see Edit Page Properties on page 9.

Edit a page from Shell Design

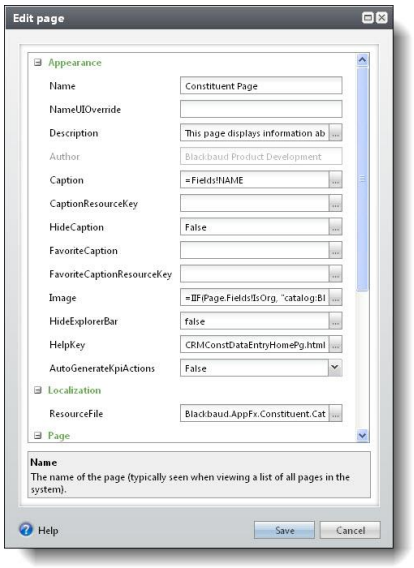
1. From the Shell Design page, select the Pages tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.



2. Select the page to edit from the list of pages in the grid.
3. Click **Edit**. The page properties screen appears.
4. Change the necessary fields.

   The items on this screen are the same as those on the Add page properties screen. For information, see Add Page Properties Screen on page 45.



5. Click **Save**. You return to the Shell Design page.

Add Widgets

You can add UI widgets to any section on a page, and can combine them with other content such as data lists to display progress tracking charts and other display indicators.

Add a widget to a page

1. Go to the page where you want to add the widget.
2. Turn on design mode and click **Edit tabs**. The Edit page tabs screen appears.
3. Click the tab you want to edit and click **Edit**.
4. For the section you want to edit, click the ellipses. The Sections screen appears.
5. To create a new section, click **Add**. The Edit sections screen appears.
6. Enter the information for the section and click **OK**. You return to the Sections screen.
7. On the Sections screen, click **OK**. You return to the Edit page tabs screen.
8. On the Edit page tabs screen, click **Save**.

Test Pages

From the Shell Design page in *Administration*, you can open pages, saving you the time of accessing other modules in the program to test your new or edited pages.

Test program pages in Shell Design

1. From the Shell Design page, select the page to test. All available pages appear in the grid. To test a page created outside of the Shell Design page using **Design Mode** or even outside of the application, you must first load the page definitions. For information about how to load pages, see Load New Pages on page 49.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

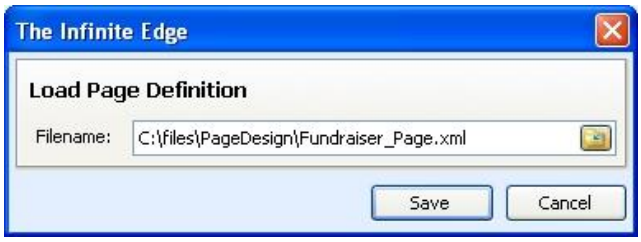
2. Click **Test Page**. The page appears.

Load New Pages

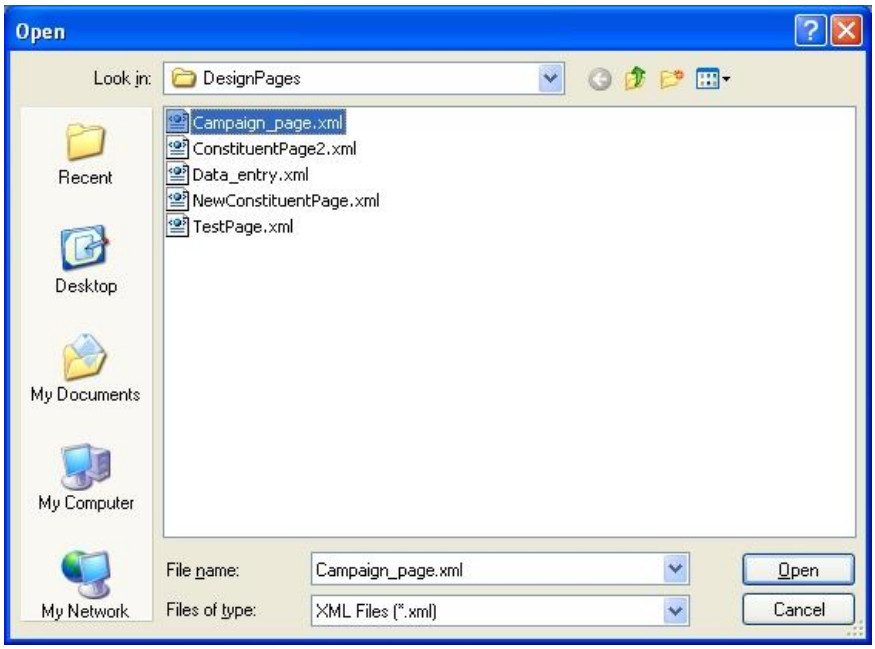
Using the **Load Page Definition** button on the Shell Design page, you can add new properly formatted XML pages to the program. If you create pages through the program using the **Design Mode** and save the pages to your hard drive, you can load the new pages into the program. After it is loaded, you can access the new pages from the Shell Design page. You can also create pages outside the program using an XML editor, *Notepad*, etc. These pages can too be loaded into the program and accessed from the Shell Design page.

Load new pages into the program

1. From the Shell Design page in *Administration*, click **Load Page Definition**. The Load Page Definition screen appears.



2. Click the folder icon at the end of the **Filename** field. The Open screen appears.



3. Map to the location of the XML file to add as a page in the program.
4. Click **Open** to return to the Load Page Definition screen.
5. Click **Save**. The page is saved to the Pages tab on the Shell Design page. You can now access the page from the properties screens in **Design Mode**.

Delete Pages

From the Pages tab in **Shell Design**, you can delete any existing page not used in the program.

▸ **Delete a page from the program**

1. From the Shell Design page, select the Pages tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Select the page to remove.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to remove the page and return to the Shell Design page.

Establish Page-Level Permissions

The **Page Permissions** option consolidates all permissions you can assign on a given page. For example, instead of opening the permissions functionality in every area included on a page - summary sections, tabs, action groups - you can open the Page Permissions screen and assign all permissions from this one area.

Note: You can still use the **Assign permissions** option available for each individual page element. The **Page Permissions** button simply provides a comprehensive, page-centric view of all features on the page from which to manage permissions. You can also still assign permissions to features via the System Roles page, which provides a role-centric view of features.

View XML

The **View XML** button included at the top of the Pages tab in **Shell Design** displays the full XML of the page without forcing you to first save it to a file. This button is activated even for pages that do not allow customization, allowing you to still view the XML and see how the page is implemented.

▸ **View XML**

1. From the action bar at the top of the page, click **View XML**. The XML appears in a separate window.
2. To save the XML as a file, click **Save As**. The Save As screen appears.
   a. In the **Save in** field, enter the location in which you want to save the file.
   b. Enter an XML **File name**.
   c. In the **Save as type** field, confirm “XML files” is selected.
   d. Click **Save**.
3. To copy the contents of the screen to the clipboard to paste into an outside application, such as Notepad, click **Copy to clipboard**. You can then open the outside application and copy the XML.
4. To close the XML display, click the “X” in the upper right-hand corner of the screen.

User-Defined Datalist Management

Datalists are a fundamental component in the application design. For examples, the Constituent Address List, Ad-hoc query list, System Role List, and Constituent Giving History list are all fairly common to designers who work in the program. In addition to the long list of datalists included with the program, you can easily add datalists to the catalog that can then be used to define new pages or edit existing pages.

Note: For more information about datalists, see Datalist on page 65

For example, you plan to add an Active Events tab to the existing Events Overview page. On this tab, you want all events currently designated as "Active" in the program to display. To accomplish this, you need a datalist of "Active events" and one does not exist in the default version of the program. From the User-defined Datalists tab, you can add this new datalist. You can also edit and delete user-defined datalists from this tab.

▸ Add a new user-defined datalist

The user-defined datalists are based on Ad-Hoc queries, so when you create a new datalist, you actually create a new query to be added to the Datalist catalog.

1. On the Shell Design page, select the User-defined Datalists tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

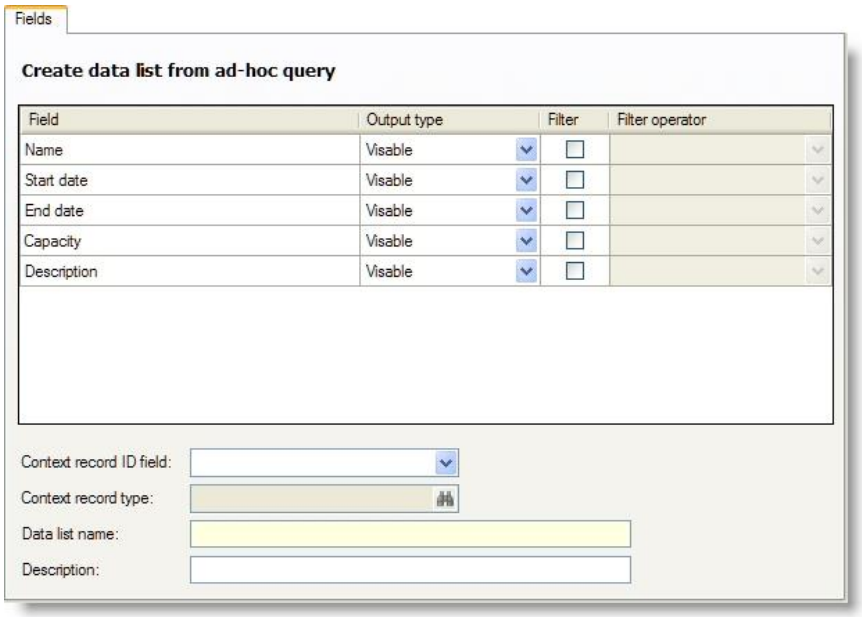
2. Under **User-defined datalists**, click **Add** on the action bar. The Select a Source View screen appears.

Note: When you create queries, it is important to understand the idea of source views. All queries are based on an initial source view. When you select a specific source view, you instruct the program to select that particular type of record for inclusion in the query. Source views determine the field categories available to include in a query. The record type on which a query is based determines where the query is available and how the program uses it. You can consider the selection of a source view as the first step to narrow the information available for your query.

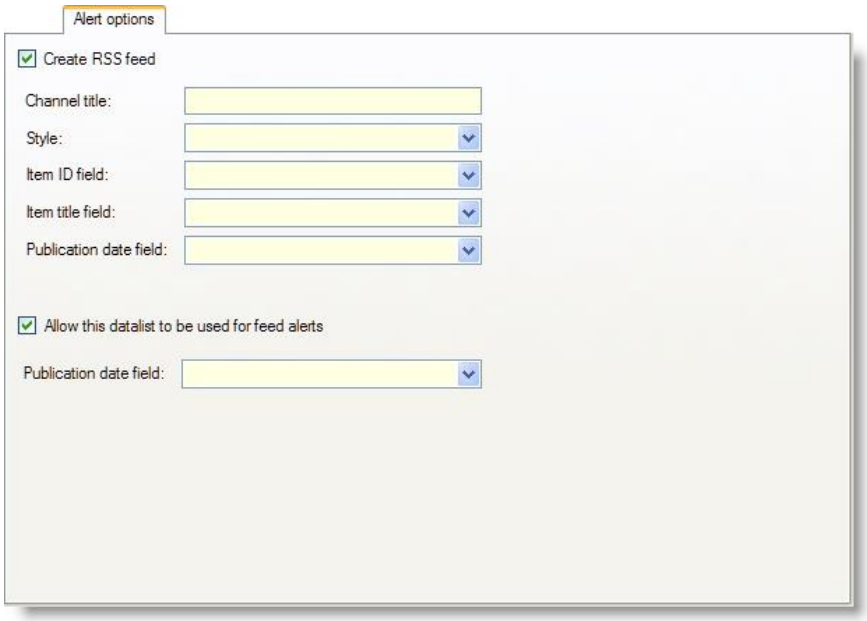
3. Select a source view and click **OK**. The New Ad-hoc query screen appears.
4. Create the query to use to create the datalist.

Note: For information about how to create a query, see the *Query and Export Guide*.

5. After you create the query, click **Save Datalist and Close** on the tool bar. The Create datalist from ad-hoc query screen appears. In the grid, all output fields selected when you create your query appear.



6. In the **Output type** column, select whether the corresponding field is visible, hidden, or none.
7. In the **Filter** column, select the fields on which to filter the output. If you select **Filter** for a field, in the **Filter operator** column, select the criteria operator by which to filter the output.
8. In the **Context record ID** field, select the field to use to identify an item in the datalist.
9. In the **Context record type** field, the record type associated with the context record ID appears. To select a different record type, click the binoculars and use the Record Type Search screen to select the record type to use.
10. Enter a unique name and description to help identify the datalist.
11. If the output fields of the query includes a date field, you can also an RSS feed/list with the datalist or enable email alerts to use the datalist. To configure an RSS feed/list or email alert, select the Alert options tab.



To create an RSS feed for the datalist:

a. Select **Create RSS feed**.

b. In the **Channel title** field, enter the title to appear with the RSS feed/list.

c. In the **Style** field, select whether to display the RSS content in a feed or list.

d. In the **Item ID field** field, select the output field to use to identify the RSS feed/list.

e. In the **Item title field** field, select the output field to use as a title for each item on the feed/list.

f. In the **Publication date field** field, select the output field date information to associate with the feed/list as the publication date.

To users to create an email alert based on the datalist, select **Allow this datalist to be used for feed alerts**. In the **Publication date field** field, select the output field date information to associate with the email alert as the publication date.

12. Click **Save**. You return to the User-defined Datalists tab. Under **User-defined datalists**, your new datalist appears. When you define datalists in *Page Designer*, you can now select the new datalist.

Edit an existing user-defined datalist

User-defined datalists are based on Ad-Hoc queries, so when you edit an existing user-defined datalist, you actually edit an existing query to be updated in the Datalist catalog.

1. On the Shell Design page, select the User-defined Datalists tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Under **User-defined datalists**, select the datalist to edit.
3. Click **Edit**. The Ad-hoc query screen appears.
4. Make any necessary changes.

Note: For information about how to create a query, see the *Data Management Guide*.

5. Save and close the query. You return to the User-defined Datalists tab. Under **User-defined datalists**, the updated datalist appears.

Delete an existing user-defined datalist

1. On the Shell Design page, select the User-defined Datalists tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Under **User-defined datalists**, select the datalist to delete.
3. Click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the User-defined Datalists tab.

User-Defined Smart Queries Management

From **Shell Design**, you can create smart query definitions, or templates, based on ad-hoc queries you previously added in *Query*. With a smart query, you can group records based on specific criteria such as SYBUNT (constituents who gave Some Year But Unfortunately Not This year). After you create a smart query definition, you can add new smart queries by entering criteria in the fields you selected for the query definition. You do not have to select filters and output fields or define a sort order each time you create a smart query because you previously determined the information to include in the smart query definition. In addition, the query is optimized for maximum processing speed and performance.

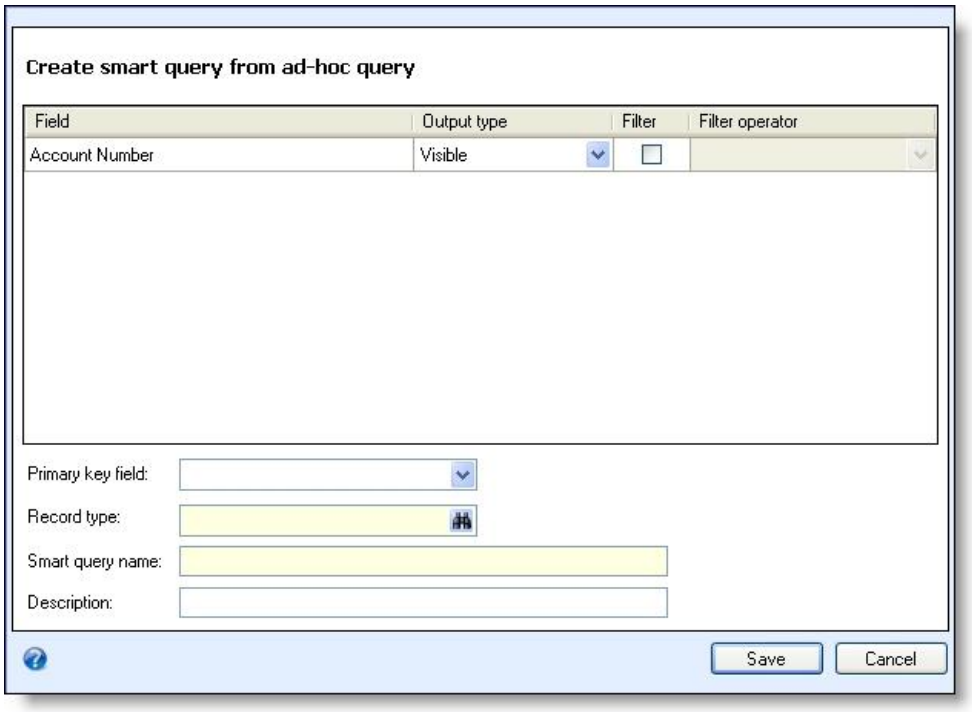
Add a user-defined smart query

Before you can create a smart query on the User-defined Smart Queries tab, you must create an ad-hoc query that contains the information to include in the smart query.

1. On the Shell Design page, select the User-defined Smart Queries tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Click **Add**. The Select a Source View screen appears.
3. In the **Record type** grid, select **Ad-hoc Query**.
4. Click **OK**. The New Smart Query screen appears.
5. From the **Ad-hoc Queries** pane, drag **Ad-hoc Query record** to the **Filters** pane. The Apply Criteria to Ad-hoc Query Record screen appears.
6. In the **Value** field, select the ad-hoc query to use as the basis for this smart query definition.
7. Click **OK**. You return to the New Smart Query screen.
8. Include any additional filters or output fields, then click **Save**. The Create smart query from ad-hoc query screen appears.



Each output field you selected for the ad-hoc query appears in the **Field** column.

9. From the **Output type** column, select whether to include, exclude, or hide the output field in the smart query definition.
10. To apply criteria to limit the results in the smart query, select **Filter** and in the **Filter operator** column, select a filter.

    When you create a smart query based on this query definition, each field you filter appears on the Parameters tab of the Smart Query screen with the filter operator. For example, if you include "Account Number" with a filter operator of "Not Equal To," the Parameters tab displays an **Account Number not equal to** field. You can specify which parameter this number should not equal in the query results.
11. In the **Primary key** field, select an output field as the primary key for the query.

Warning: Select an output field that is a unique identifier for records as the primary key. For example, if the smart query includes constituent records, you may select "Constituent record" as the primary key for the smart query definition. If the **Primary key** field does not contain an entry that uniquely identifies records, click **Cancel** on the Create smart query from ad-hoc query screen, then add the unique identifier field to **Output Fields** on the Ad-hoc Query screen.

12. In the **Record type** field, select a record type to associate with this definition. You can search for the query definition based on the record type you select.

    The record type you select also determines which entries appear on the Choose Page Definition screen in **Smart Query Browse**.
13. Enter a name and description for the new smart query definition.
14. Click **Save**. You return to the New Smart Query screen.

Ad-hoc Query Reports Management

From **Shell Design**, you can create a new ad-hoc query report which subsequently adds a new ad-hoc query to your database.

You can add, edit, and delete ad-hoc query reports from the Ad-hoc Query Reports tab of the Shell Design page in *Administration*.

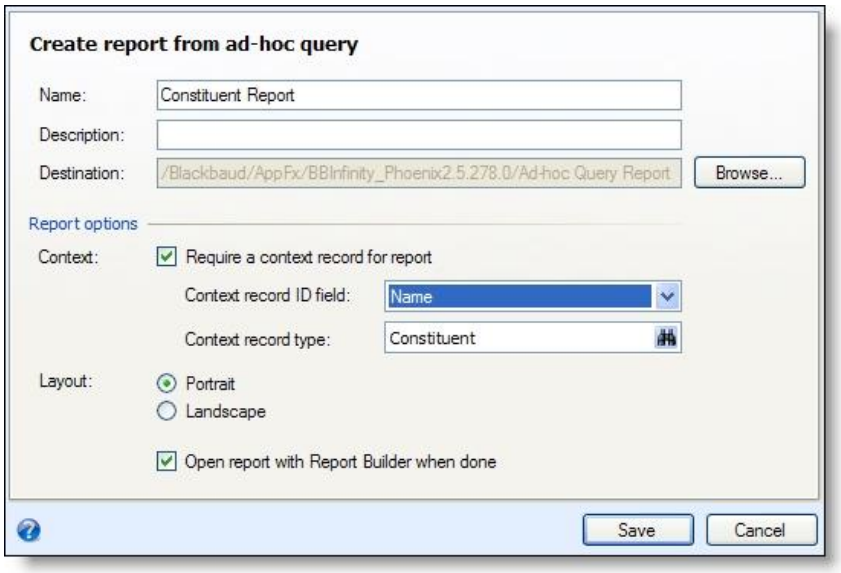
From Report Explorer, you can edit existing reports or create new ones. After you create an ad-hoc query report, you can create a link on a specific page to the report. For example, if you create a report and base it on the context record type of Constituent, you can right-click the report in Report Explorer and select **Add Report to Page**. The Add Report to Page screen appears where you can specify a caption, the page from which to view the report, and the context ID parameter. For information about Report Explorer, see the Manage Reports chapter of the *Reports Guide* or the Reports section of the help file.

Add an ad-hoc query report

1. On the Shell Design page, select the Ad-hoc Query Reports tab.

Note: For information about how to access the Shell Design page, see Open Shell Design on page 30.

2. Click **Add**. The Select a Source View screen appears.
3. In the **Record type** grid, select the type of query to base a report on. For example, select **Constituent**.
4. Click **OK**. The New Report screen appears.
5. From the column adjacent to the Field Explorer pane, drag fields to the **Filters** pane. The Apply Criteria screen appears.
6. Select the values to be used as criteria for each field query field you select.
7. Click **OK**. You return to the New Report screen.
8. Include any additional filters or output fields, then click **Save**. The Create report from ad-hoc query screen appears.



9. In the **Name** and **Description** fields, enter a name and description to help identify the report.

10. In the **Destination** field, click the **Browse** button to access the Choose Report Folder screen. From this screen, select a folder destination for your ad-hoc query report.

    The Choose Report Folder screen displays the available folder options in Report Explorer. You can select an existing folder or create a new one.

11. To filter and base the report on a specific field, select **Require a context record for report**.
12. In the **Context record ID** field, select an output field as the primary filter field for the query.

    Each output field you selected for the ad-hoc query appears in the **Context record ID field**.

13. In the **Context record type** field, select a record type to associate with the report. You can search for the record type based on the context record you select.
14. Select to view your report in **Portrait** or **Landscape** format.
15. To edit and customize your report using Report Builder 2.0, select **Open report with Report Builder when done**.

    If you do not select this checkbox, the program generates the report but you do not have the ability to customize as you would with Report Builder 2.0.

Note: To customize an ad-hoc query report, you can access your report in Report Builder 2.0 through Report Explorer, the Shell Design page, or from the query report.

16. Click **Save**. You return to the Ad-hoc Query screen.

    The ad-hoc query report displays results associated with the site or sites accessible by the user running the query.

Edit Ad-hoc Query Report

From the Ad-hoc Query Reports tab in **Shell Design**, you can edit any existing ad-hoc query report. For example, you may want to change the name and description used to identify a report. To edit a report, select the report to edit and click **Edit**, Ad-hoc query on the action bar. To edit using Report Builder 2.0, click **Edit**, **Edit layout**.

Delete Ad-hoc Query Report

From the Ad-hoc Query Reports tab in **Shell Design**, you can delete any existing ad-hoc query report. To delete a report, select the report to delete and click **Delete** on the action bar.

Page Designer Options

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The **property** screens that you access in **Design Mode** include a number complex field options. This means the fields require more than a simple response. In most cases, the fields open additional screens, allowing you to design actions, action groups, and navigation trees; create expressions; or select from a number of options that require detailed explanations.

Use Expressions In Design Mode

Expressions are conditions or functions that applications evaluate to produce specific types of values. You can use expressions to define conditions such as rules, input constraints, and preconditions. The Page expression form is of the same record type as the page. The expression loads no user interface up front with the page itself, just pieces of data for use in expressions elsewhere on the page.

Warning: Working with expression requires some knowledge of SQL.

Expressions leverage the full VB.NET syntax. For example, to change the constituent page caption to include the constituent name and the date/time stamp, you would use the following expression:

=Fields!NAME & " " & date.now

The fields included in the **Available Fields** box of the Expression screen are determined by the ExpressionDataForm.

Create an expression

1. From the properties screen select "Expression" in the drop-down menu. An **Expression** field appears on the properties screen.

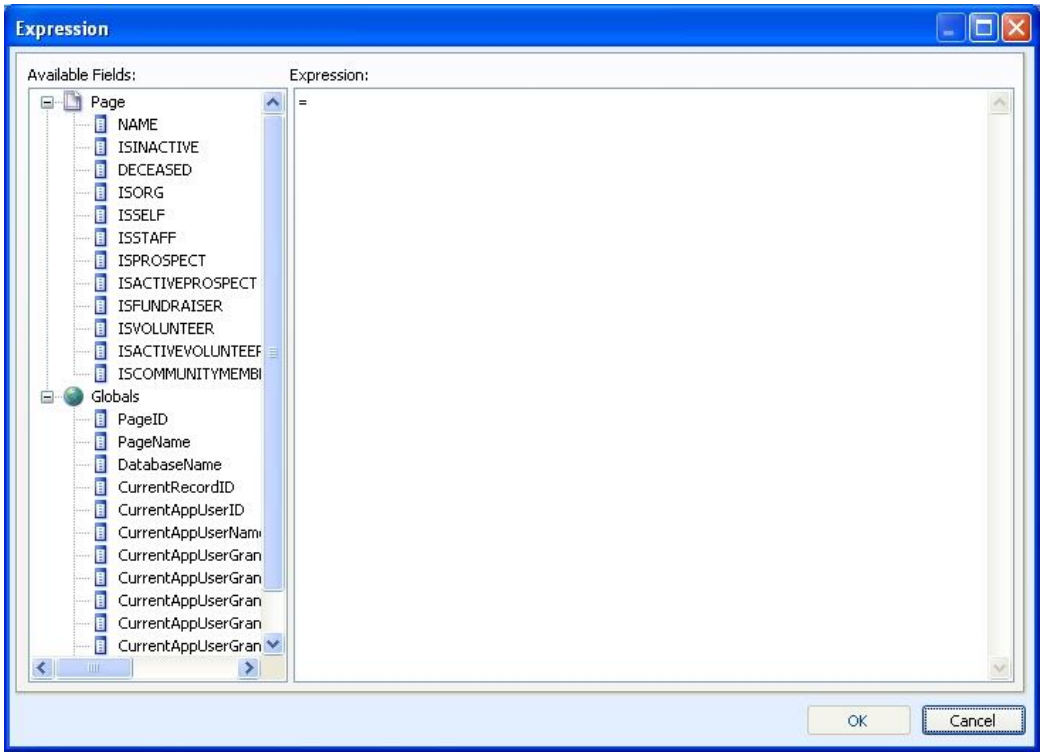
For example, you can change the Accounts tab in a constituent record. Currently the tab uses a "PageContext" **ContextType**, but you want to create an expression and assign it as the **ContextType**:

a. From the Accounts tab, click the **Properties** button that displays on the tab when you activate **Design Mode**.

b. In the **ContextType** field, click the drop-down menu and select "Expression." The **Expression** field appears in the properties screen under the **ContextType** field.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.

2. Click the ellipsis at the end of the **Expression** field. The Expression screen appears.



3. The **Available Fields** pane displays all available expression description types. Compose your expression in the **Expression** pane. Double click on any field listed in the **Available Fields** pane to move the field into the **Expression** pane.

Note: The fields included in the **Available Fields** box of the Expression screen are determined by the ExpressionDataForm.

4. Click **OK**. You return to the properties screen.

5. Click **Save**. You return to the program page.

Select Images

In **Design Mode**, you can include images in most page design areas: pages, tabs, action groups, etc. In the **Image** field on these properties screen, you can select an image to include in the selected area.

For example, in the default version of the program, the **Add** action has the "NewItem" image associated with the button.

This image is identified in the **Image** field, accessed by clicking **Edit Action** in any area of the program that includes the **Add** button (i.e., the Documentation tab on a constituent record).

Select an image to include in your design area

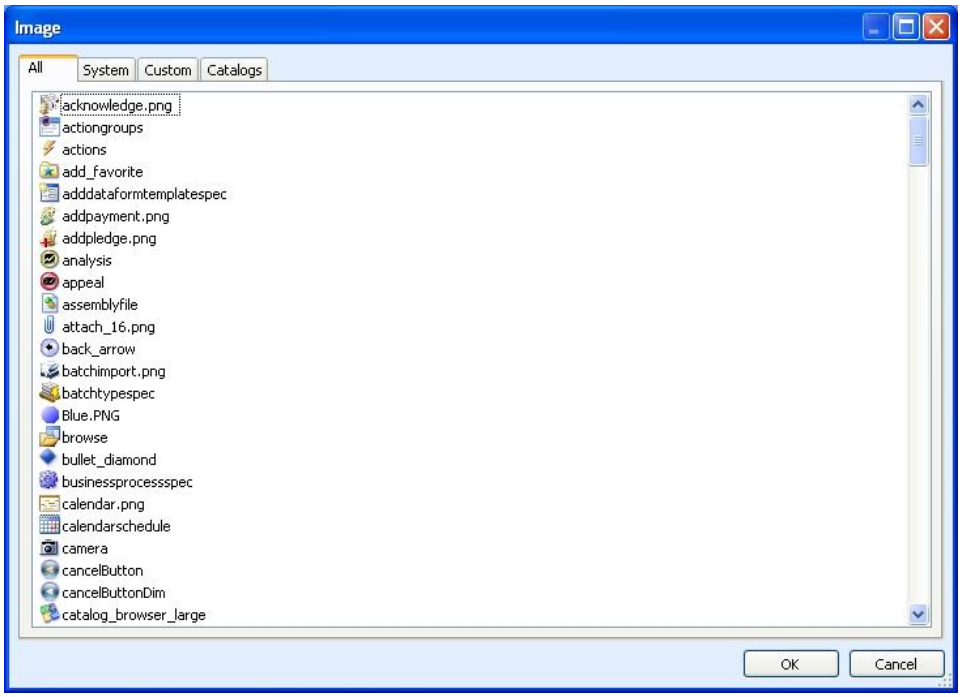
1. From the property screen for the design area (page, tab, action group, etc.), in the **Image** field, click the drop-down arrow and select "Browse." The Image screen appears, displaying a series of tabs.

   For example, to change the image that appears at the top of your constituent record page:

   a. From a constituent record page, click the **Page Properties** button the appears at the top of the page when you activate **Design Mode**. The constituent page properties screen appears.

   b. In the **Image** field, click the drop-down arrow and select "Browse." The Image page appears and displays a series of tabs.

Note: You can also select the "Expression" option to access a screen on which you can enter an expression command. For more information about expressions, see Use Expressions In Design Mode on page 59.



2. Select a tab.

   - All: The All tab displays all images available: system, custom, and catalogue.
   - System: The System tab displays all images burned in the system.
   - Custom: The custom tab displays all images you saved in the …\Infinity\Browser\clientbin\Images directory. In some areas of the program you can either "Browse" for your image or use an "Expression," but this is not true in all areas. For example under the page properties you can use an expression, but for a functional area you can only "Browse" for a stored image.
   - Catalogues: The Catalogues tab houses images available in the program catalogues, grouped based on the catalogue to which it belongs. For example, to use an image you know is used in *Fundraising*,

you can go directly to the *Fundraising* catalogue section on the Catalogues tab and locate the image.

3. Click on the image to select it. You return to the properties screen. The image and image title appear in the **Image** field. When you save the properties, the image appears in the selected area in the program.

Define a Section Type

The **SectionType** field appears in several places in **Design Mode**. For example, you can include sections on your tabs or summary sections. The drop-down menu in the **SectionType** field includes several options, allowing you to arrange your data in a format most advantages to your needs.

When you select a **SectionType**, the options included on the properties screen change based on your selection. For example, if you select the "Datalist" **SectionType**, a **Datalist** frame appears in the properties grid, displaying options specific to a Datalist; if you select a "DataForm" **SectionType**, a **DataForm** frame appears in the properties grid, displaying options specific to a DataForm.

Note: For information about SectionType, see Program Components on page 1.

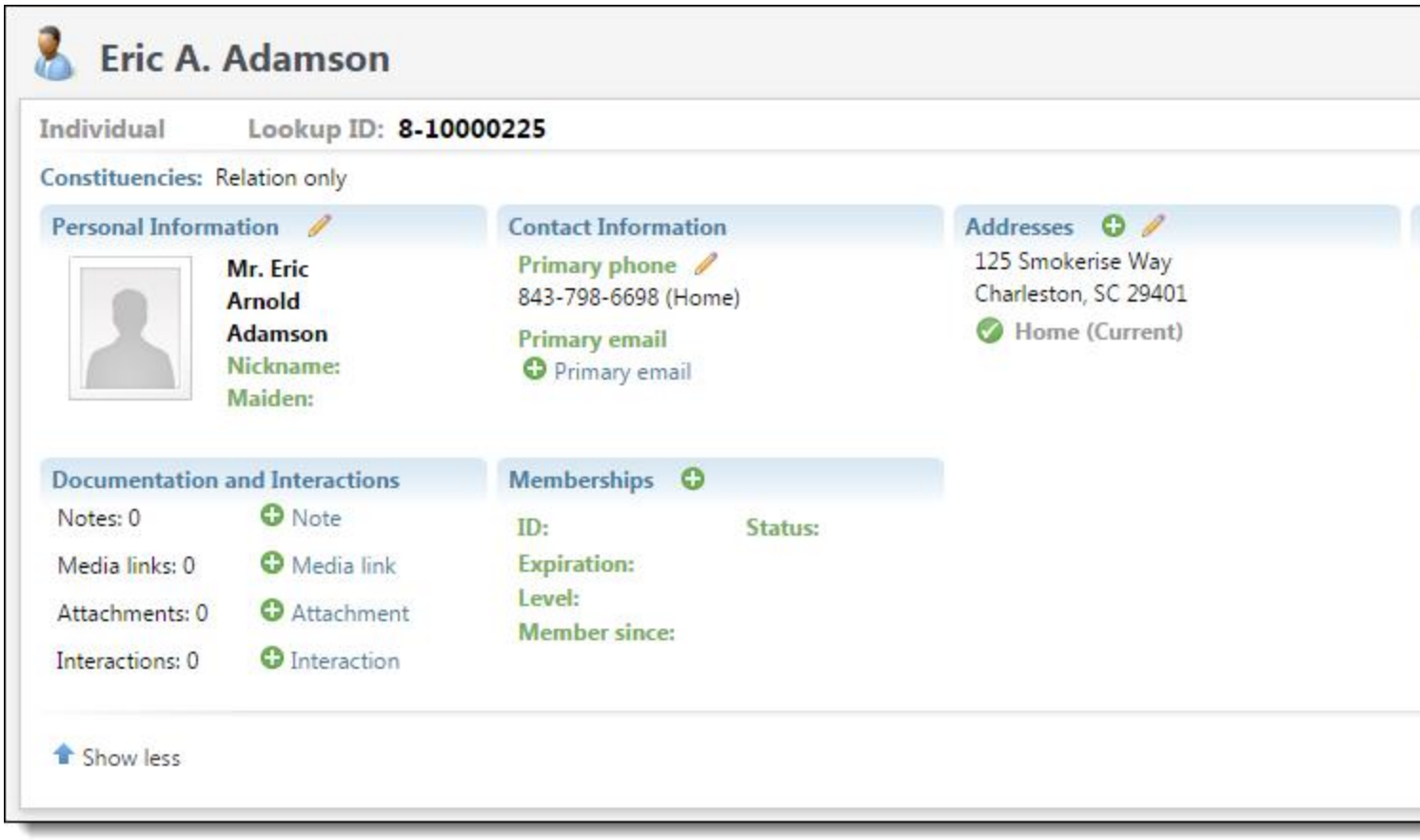
The program supports the following SectionTypes:

DataForm

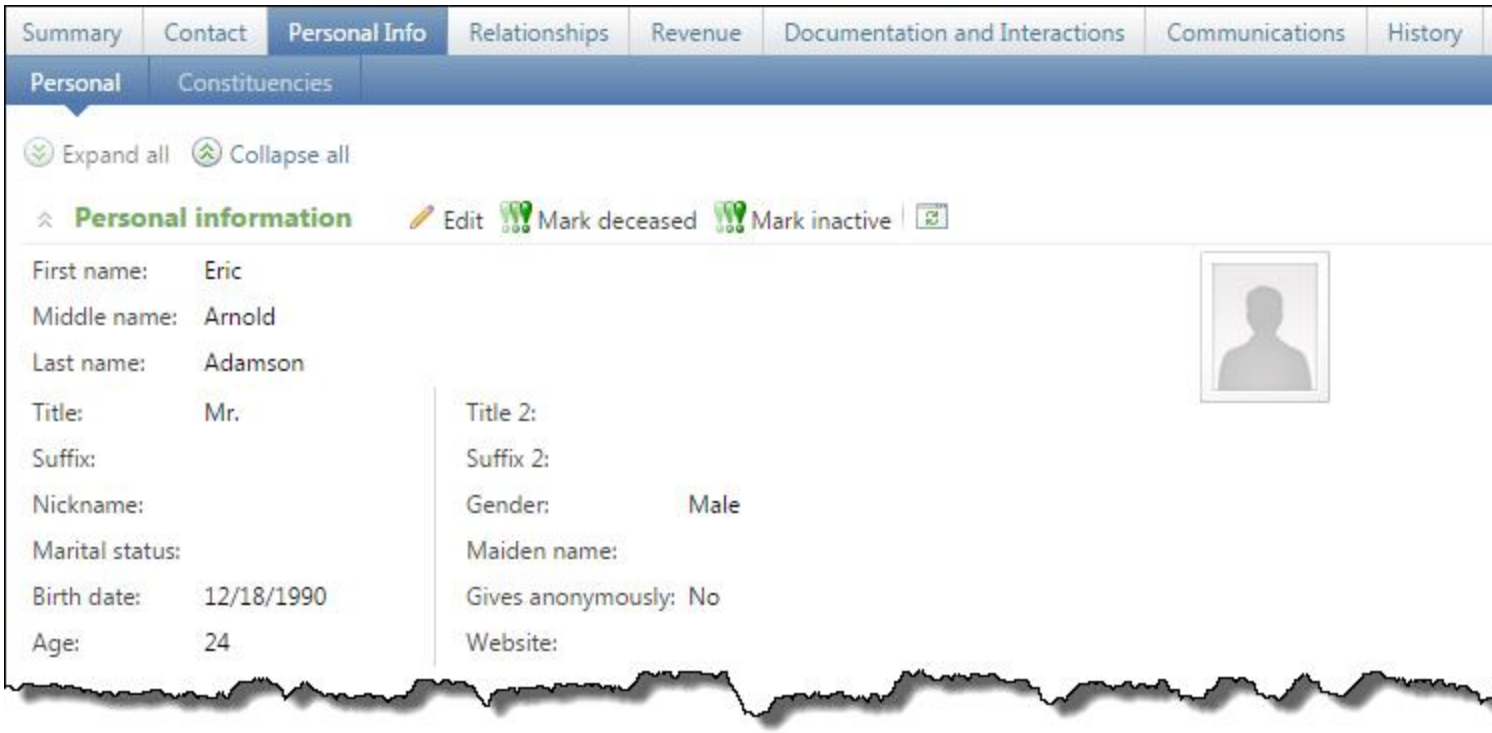
The DataForm option adds a data form to your design. Some DataForm examples include the profile section on the top of a constituent record page, the **Personal information** frame on the Personal tab of a constituent record page, and the Wealth Summary tab on the Prospect page of a prospect record.

A DataForm is generally not editable and displays data pulled from various areas of the program. For example, the Wealth Summary tab displays a summary of a prospect's assets and income. In addition, you can hyperlink fields included on the DataForm to other areas of the program.

Constituent profile



Personal Info tab



DataForm Properties

When you select the "DataForm" **SectionType** on a properties screen, a **DataForm** frame appears, allowing you to define the following properties.

Screen Item	Description
DataForm	The program comes with several predefined DataForms. To access a list, click the ellipsis button in the **DataForm** field. The Search screen appears. To view a list of all forms available, click **Search**. A list of all forms appears with a brief description. If you know the name or part of the name of the form, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the form, select it in the grid and click **Select.** You return to the properties screen.
ContextType	You must identify the context of the record to display in this DataForm. Most DataForms require a "PageContext." You can also select a "PageExpressionField" or "Expression." For more information about ContextType, see Select ContextType on page 93.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select "Expression" in the **ContextType** field, you must create the Expression to use. For more information, see Use Expressions In Design Mode on page 59.
ShowBorder	Visibility status of the section border: False = not visible; True = visible.
IsScrollable	Is a scroll bar include in the dataform, allowing users to scroll through the dataform to view information: False = no scroll bar; True = scroll bar included.

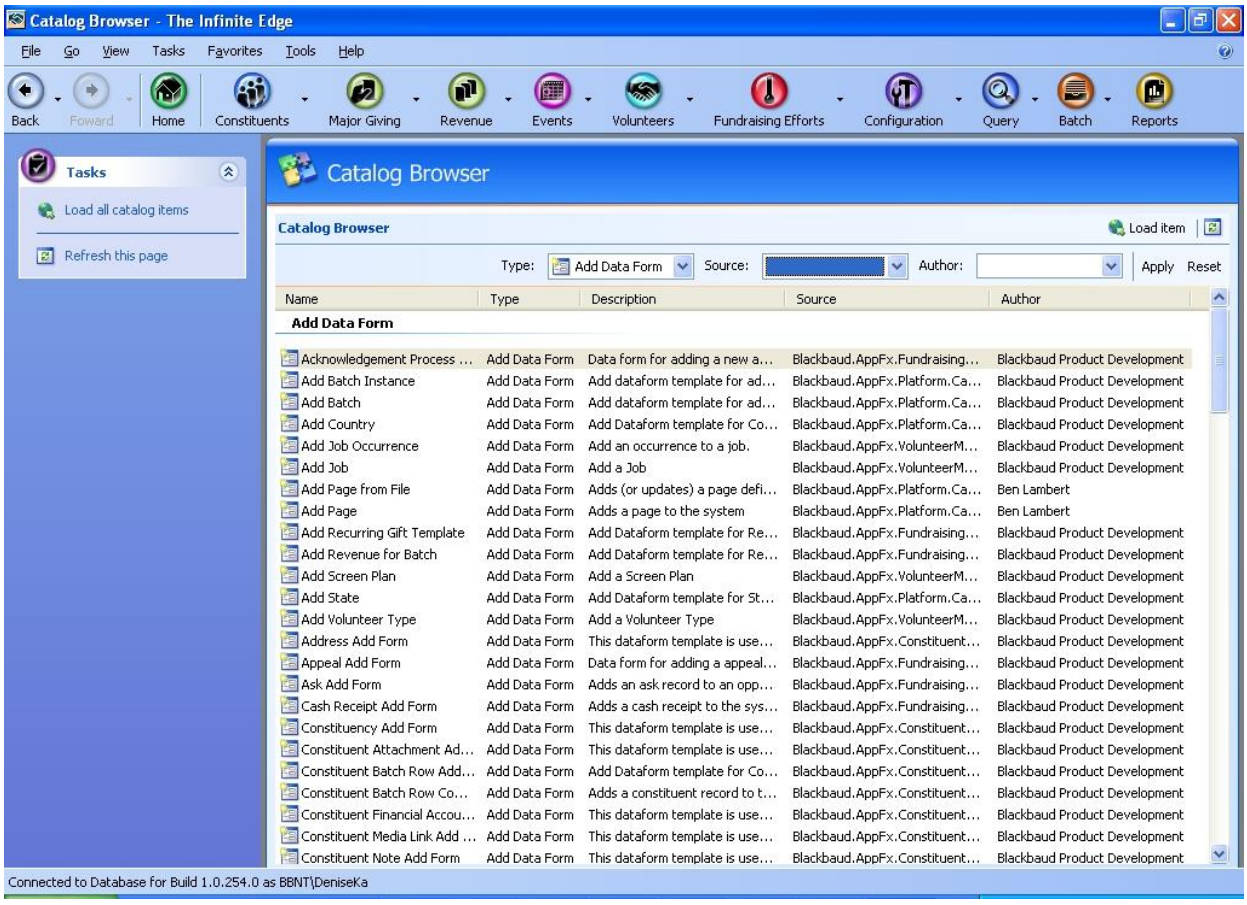
Datalist

The Datalist option displays data in a tabular form. Your options include a standard grid, a grouped view (grouped based on selected columns in the list), or a repeater view (each row in the list displays in the same DataForm).

Note: In addition to the Datalists included with the program, you can create a new Datalist. To access the Datalist for uploading into the program, store the file in bin directory located in the program's Deploy folder.

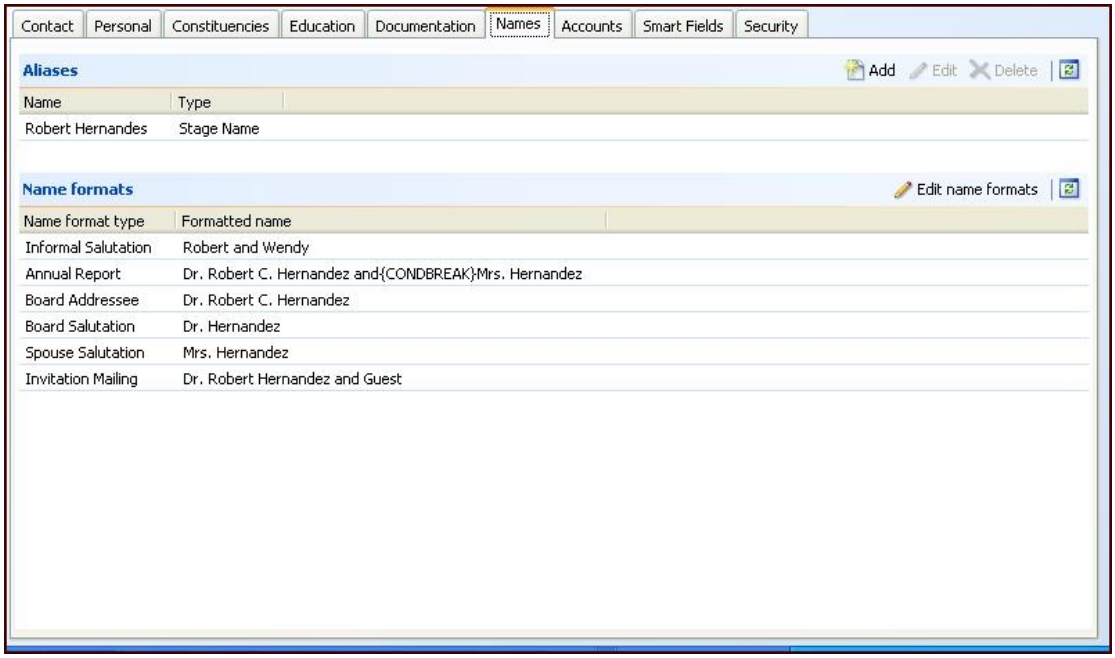
Some Datalist examples include the Catalog Browser page (grouped view) in *Administration* and the Relationships tab on a constituent record. You can also display a detail form for each row selected on a Datalist, as on the Documentation tabs included in the program, and tie section actions to selected rows (**Add**, **Edit**, **Delete**).

Catalog Browser (grouped view based on **Type**)



Addresses frame from the Contacts tab of a constituent record (Repeater view)

Names tab on a constituent record (Standard Grid)



Datalist Properties

When you select the “Datalist” **SectionType** on a properties screen, a **Datalist** frame appears, allowing you to define the following properties.

Screen Item	Description
Datalist	The program comes with several predefined Datalists. To access the predefined lists, click the ellipsis button in the **Datalist** field. The Search screen appears. To view a list of all Datalists available, click **Search**. A list of all Datalists appears with a brief description. If you know the name or part of the name of the list to use, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the list, select it and click **Select**. You return to the properties screen.
ContextType	You must identify the context of the record to display in this Datalist. Most Datalists require a “PageContext.” You can also select a “PageExpressionField” or “Expression.” For more

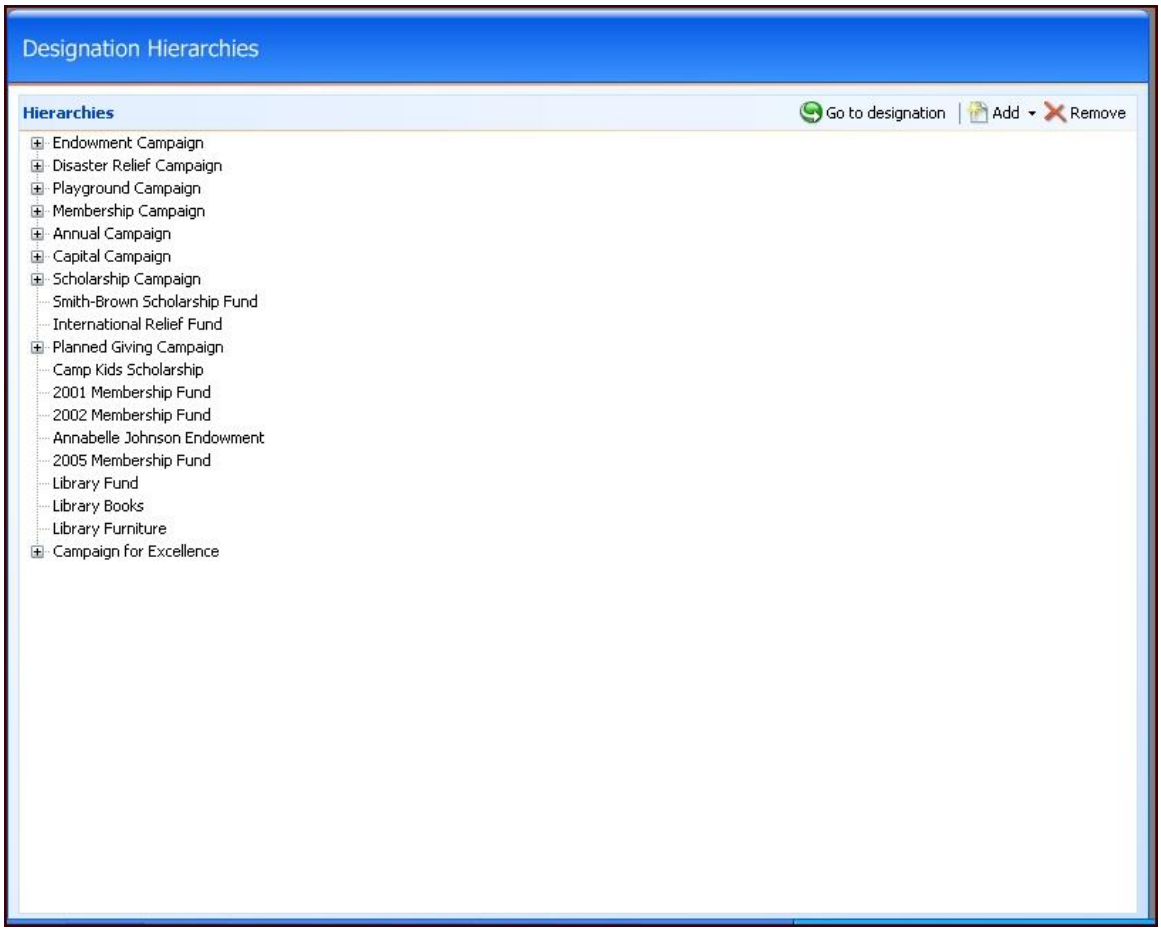
Screen Item	Description
	information about ContextTypes, see Select ContextType on page 93.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the Expression to use. For more information, see Use Expressions In Design Mode on page 59.
ShowBorder	Visibility status of the section border: False = not visible; True = visible.
Style	Select how to arrange your datalist. If you select "GroupedView," all data is grouped into one list, as on the Catalog Browser page in *Administration*; if you select "StandardGrid" view, the data is listed in a grid format, as on the Names tab on the constituent record; if you select "RepeaterView," the data is listed in a repeated format, as on the Occurrences tab on the Job page in *Volunteers* and the **Addresses** frame on the Contact tab in a constituent record.
ExpandFirstLevelNodes	Select" True" for the program to expand the immediate children of the root when it loads the Datalist. By default, the program collapses the entire list and only exposes the top level.
ExpandAllOnLoad	Select" True" for the program to expand all children of the root when it loads the Datalist. By default, the program collapses the entire list and only exposes the top level.
ViewDataForm	Select data to view in the Datalist. For example, on the Occurrences tab of a Job record, you probably want to view job occurrence information; therefore, you would select the "Job Occurrence View Dataform." The program then pulls occurrence data for the job and displays it on this tab. You can use an existing ViewDataForm or an expression. To use an expression, in the drop-down menu in the **ViewDataForm** field, select "Expression." The Expression screen appears. To use an existing form, in the drop-down menu in the **ViewDataForm** field, select "Browse." The Search screen appears. To view a list of all ViewDataForms available, click **Search**. A list of all forms appears with a brief description. If you know the name or part of the name of the form to use, enter it in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the form, select it and click **Select**. You return to the properties screen.
Record ID	Appears if you select a **ViewDataForm**. The ViewDataForm column to use as a source for the record ID.
HeaderCaption	Appears if you select a **ViewDataForm**. A header for the new ViewDataForm section.
Groups	If in the **Style** field, you select "GroupedView," the **Groups** field appears. To select a field to group data by, click the ellipsis at the end of the field. The Select Group Fields screen appears. In the **Available Fields** box, select the field to use. In the **Default Grouping** field, you can select a group for the program to use as a default. Click **OK** to return to the properties screen.
HeaderBackColor	If in the **Style** field, you select "RepeaterView," the **HeaderBackColor** field appears, allowing you to select a background color to appear behind each header on the page.

Screen Item	Description
HeaderGradientBackColor	If in the **Style** field, you select “RepeaterView,” the **GradientBackColor** field appears, allowing you to select a gradient background color to appear behind each header on the page.
CaptionColor	Select a color for your header text.
AutoSize	If in the **Style** field, you select “StandardGridView,” the **AutoSize** field appears, allowing you to select to automatically size the grid based on the amount of data retrieved; you can select False = not automatically sized or True = automatically sized.
AutoLoadList	Select” True” for the program to automatically load the data into the Datalist when the section is accessed. If you select “False,” the data does not load; a link appears asking you to click to load the data.
AutoDisplayFilters	Select “True” for filter controls to appear when the section opens. If you select “False,” no filters appear.
Legend	Use this option to customize the color and font in a grid, such as the **Giving History** grid. For example, for a giving history you can designate amounts > $120 = italic and violet red, pledges = bold and yellow, and gifts > $1000 = green. The change is system-wide not per user. To make this change, from the **Legend** field on the property screen click the ellipsis at the end of the field. The Legend screen appears. From this screen, you can add multiple expressions that evaluate to “True” and “False.” If the expression is “True” the font and color indicated are applied to the row. Click **OK** to return to the properties screen.

CustomComponent

The CustomComponent option adds a completely user-defined section to your design. A CustomComponent example in the program includes the Designation Hierarchies page in *Fundraising*.

Designation Hierarchies page



CustomComponent Properties

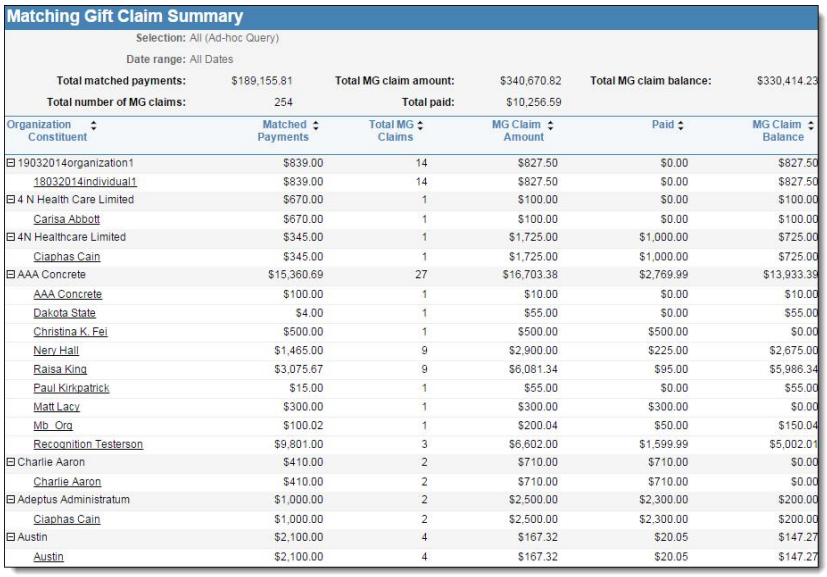
When you select the "CustomComponent" **SectionType** on a properties screen, a **CustomComponent** frame appear.

Screen Item	Description
CustomComponent	CustomComponent file to use in this section. All CustomComponent files are stored in the bin directory in the program's Deploy folder.
ContextType	You must identify the context of the record to display in this CustomComponent. PageContext is the most common, but you can also select a PageExpressionField or Expression.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the Expression to use.
Parameters	Enter the parameter values for the section. Click the ellipsis at the end of the field to access the Parameters screen. For information about how to define parameters, see Define Parameters on page 91.
ShowBorder	Visibility status of the section border: False = not visible; True = visible.
IsScrollable	Is a scroll bar include in the CustomComponent, allowing user to scroll through the form to view information: False = no scroll bar; True = scroll bar included.

Report

The Report option adds a program-generated report to your design. For example, fundraisers in your organization may need to view the Matching Gift Pledge Summary report on a regular basis. You can add a tab to the standard fundraiser record, allowing them to view the report from their fundraising page.

Reports Tab added to the Fundraiser page



Matching Gift Claim Summary

Selection: All (Ad-hoc Query)

Date range: All Dates

Total matched payments:	$189,155.81	**Total MG claim amount:**	$340,670.82	**Total MG claim balance:**	$330,414.23
Total number of MG claims:	254	**Total paid:**	$10,256.59		

Organization Constituent	Matched Payments	Total MG Claims	MG Claim Amount	Paid	MG Claim Balance
⊟ 19032014organization1	$839.00	14	$827.50	$0.00	$827.50
18032014individual1	$839.00	14	$827.50	$0.00	$827.50
⊟ 4 N Health Care Limited	$670.00	1	$100.00	$0.00	$100.00
Carisa Abbott	$670.00	1	$100.00	$0.00	$100.00
⊟ 4N Healthcare Limited	$345.00	1	$1,725.00	$1,000.00	$725.00
Ciaphas Cain	$345.00	1	$1,725.00	$1,000.00	$725.00
⊟ AAA Concrete	$15,360.69	27	$16,703.38	$2,769.99	$13,933.39
AAA Concrete	$100.00	1	$10.00	$0.00	$10.00
Dakota State	$4.00	1	$55.00	$0.00	$55.00
Christina K. Fei	$500.00	1	$500.00	$500.00	$0.00
Nery Hall	$1,465.00	9	$2,900.00	$225.00	$2,675.00
Raisa King	$3,075.67	9	$6,081.34	$95.00	$5,986.34
Paul Kirkpatrick	$15.00	1	$55.00	$0.00	$55.00
Matt Lacy	$300.00	1	$300.00	$300.00	$0.00
Mb_Org	$100.02	1	$200.04	$50.00	$150.04
Recognition Testerson	$9,801.00	3	$6,602.00	$1,599.99	$5,002.01
⊟ Charlie Aaron	$410.00	2	$710.00	$710.00	$0.00
Charlie Aaron	$410.00	2	$710.00	$710.00	$0.00
⊟ Adeptus Administratum	$1,000.00	2	$2,500.00	$2,300.00	$200.00
Ciaphas Cain	$1,000.00	2	$2,500.00	$2,300.00	$200.00
⊟ Austin	$2,100.00	4	$167.32	$20.05	$147.27
Austin	$2,100.00	4	$167.32	$20.05	$147.27

Reports Properties

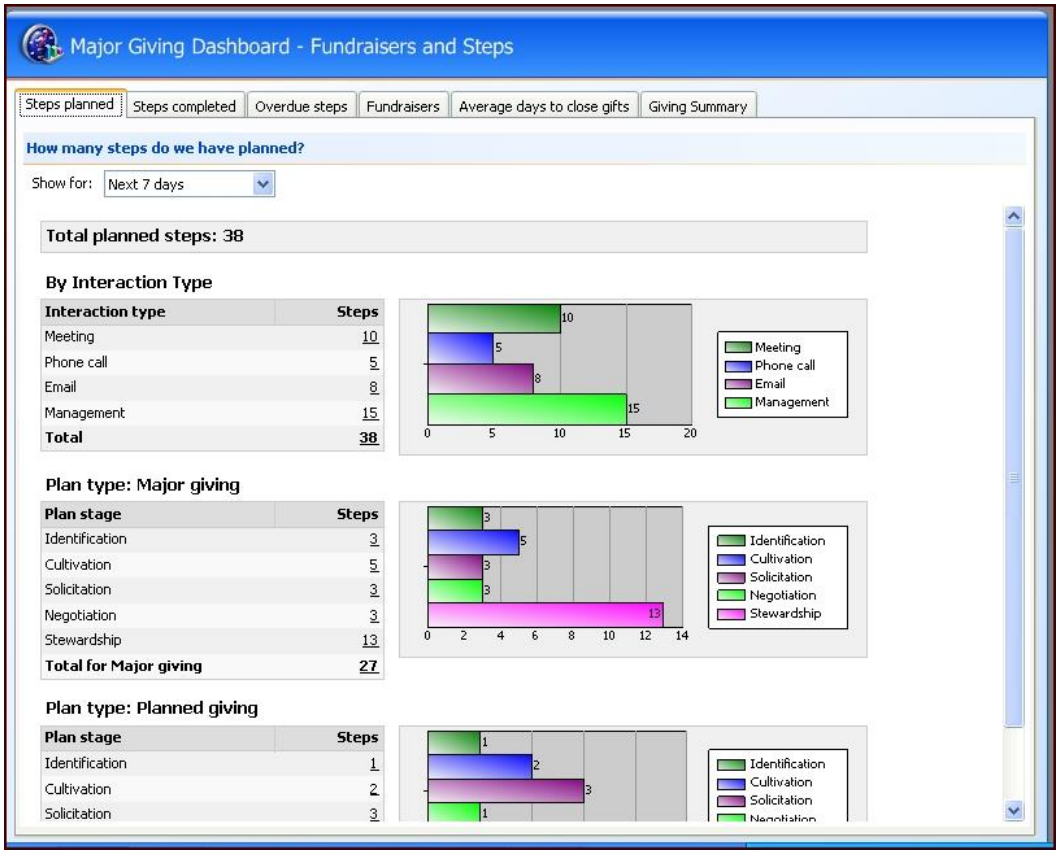
When you select the “Report” **SectionType** on a properties screen, a **Report** frame appears, allowing you to define the following properties.

Screen Item	Description
Report	Select the report to add to the section. To access a list of all report parameter files, click the ellipsis button in the **Report** field. The Search screen appears. To view a list of all reports available, click **Search**. A list of all report parameter files appears. If you know the name or part of the name of the report to use, enter the information in the **Name** field and click **Search**. After you find the report, select it and click **Select**. You return to the properties screen.
Display Prompt Area	Displays the prompt area at the top of the Report section. This includes prompts related to generating the selected report. For example, if you select the Campaign Progress Report and select to display prompts, a **Goal** field appears at the top of the Report section. False = not visible; True = visible.
DisplayDocumentMap	Displays the document map in a separate pane. The map displays a list of headings in the document. You can use the document map to quickly navigate through the document. False = not visible; True = visible.
Display Toolbar	Displays the Reports toolbar in the section. False = not visible; True = visible.
Parameters	Parameter values for the section. Click the ellipsis at the end of the

Screen Item	Description
	field to access the Parameters screen. For information about how to define parameters, see Define Parameters on page 91.

Dashboard

The Dashboard option adds a dashboard to your design. For example, a number of dashboards are included in **Major Giving**. The dashboards are accessed through **Major giving dashboards** on the **Major Giving** drop-down menu.



Dashboard Properties

When you select the Dashboard **SectionType** on a properties screen, a **Dashboard** frame appear.

Screen Item	Description
Dashboard	Select the dashboard to add to the section. To access a list of saved dashboard parameter files, click the ellipsis button in the **Dashboard** field. The Search screen appears. To view a list of all dashboards available, click **Search**. A list of all dashboard parameter files appears. If you know the name or part of the name of the dashboard to use, enter it in the **Name** field and click **Search**. After you find the dashboard, select it and click **Select**. You return to the properties screen.
ContextType	You must identify the context of the dashboard to display. Most

Screen Item	Description
	DashBoards require a PageContext. You can also select a PageExpressionField or Expression. For more information, see Select ContextType on page 93.
PageExpressionField	If "PageExpressionField" is selected in the **ContextType** field, this field displays the PageExpressionField used.
Expression	If "Expression" is selected in the **ContextType** field, this field displays the Expression used.

Define ActionTypes

The **ActionType** field appears in several places in **Design Mode**. For example, you define actions when designing a page summary section, and you can include actions on any page sections you add to tabs. The drop-down menu in the **ActionType** field includes several options, allowing you to select the action that best meets your needs. When you select an **ActionType**, the options included on the properties screen change based on your selection. For example, if you select a "DataForm" **ActionType**, a **DataForm** frame appears, displaying options specific to a DataForm.

In addition, using the **ActionType** field in the **Post-Action Event** frame you can select the type of action to follow the execution of the first action. For example, on the Contact tab in the constituent record, you can **Add** contact information to the **Phone Number** section. On the **Phone Numbers** actions properties screen, the **Post-Action Event** field is set to "RefreshPage." So after the program saves the new information to the constituent's record, the page displaying the phone numbers data is refreshed to include the new information.

Note: The **Post-Action Event** is available for only the following actions types: ExecuteCLRAction, ExecuteRecordOperation, ShowAddDataForm, ShowDataForm, and StartBusinessProcess.

The program supports the following ActionTypes:

ExecuteCLRAction

The "ExecuteCLRAction" ActionType option allows users to assign a customized block of code as an action. When you select the" ExecuteCLRAction" **ActionType** on a properties screen, a **Component** frame appears with the following options.

Screen Item	Description
CustomComponent	Name of the CustomComponent ActionType file to use in this section. All CustomComponent files are stored in the bin directory in the program's Deploy folder.
ContextType	Identifies the action ContextType. You can select "PageContext," "None," "PageExpressionField," "Expression," "SectionField," and "SearchListReturnValue." For information about context types, see Select ContextType on page 93.
PageExpressionField	If "PageExpressionField" is selected in the **ContextType** field, this field displays the PageExpressionField used.
Expression	If "Expression" is selected in the **ContextType** field, this field displays the Expression used.
SectionField	If "SectionField" is selected in the **ContextType** field, this field displays the SectionField used. This is a field in the section to use as the context ID.

Screen Item	Description
SearchListReturnValue	If "SearchListReturnValue" is selected in the **ContextType** field, this field displays the SearchListReturnValue used. The search list locates the record to use as the action's context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.

Execute Record Operation

The "ExecuteRecordOperation" ActionType option allows you to select the operation to execute when a user selects the action. For example, in many areas of the program users can delete information. **Delete** is an "ExecuteRecordOperation" **ActionType**. After you select the "ExecuteRecordOperation," you must define the **RecordOperation**. For example, if you are deleting a phone number from a constituent record, the operation is "PhoneDelete."

When you select the" ExecuteRecordOperation" **ActionType** on a properties screen, a **RecordOperation** frame appear with the following options

Screen Item	Description
RecordOperation	The program comes with several predefined RecordOperations. In addition, if you create RecordOperation files and save the files to the bin directory in the program's Deploy folder, you can access these RecordOperations from this field. To access a list of options, click the ellipsis button in the **RecordOperation** field. The Search screen appears. To view a list of all operations available, click **Search**. A list of all operations appears with a brief description. If you know the name or part of the name of the operation, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the operation, select it and click **Select**. You return to the properties screen.
ShowPrompt	True = A confirmation prompt appears, asking the user to confirm the action before the action is executed; False = No confirmation prompted appears before the action is executed.
ContextType	Identifies the action ContextType. You can select "PageContext," "None," "PageExpressionField," "Expression," "SectionField," and "SearchListReturnValue." For information about context types, see Select ContextType on page 93.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the Expression to use.
SectionField	If you select "SectionField" in the **ContextType** field, you must select the SectionField to use. This is a field in the section to use as the ContextID.
SearchListReturnValue	If you select "SearchListReturnValue" in the **ContextType** field, you must select the SearchListReturnValue to use. This is the SearchList used to locate the record to use as the action's context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.

ShowAddDataForm

The “ShowAddDataForm” ActionType option allows users to add information to a data form. For example, users can add information to the **Phone numbers** section of the Contact tab in a constituent record because an **Add** action is included on the tab. The **Add** action allows for a “ShowAddDataForm” in the **ActionType** field and the “PhoneAddForm” in the **DataForm** field.

When you select the” ShowAddDataForm” **ActionType** on a properties screen, a **DataForm** frame appear with the following options.

Screen Item	Description
DataForm	The program comes with several predefined DataForms. In addition, if you create DataForm files and save the files to the bin directory in the program’s Deploy folder, you can access these DataForms from this field. To access a list, click the ellipsis button in the **DataForm** field. The Search screen appears. To view a list of all forms available, click **Search**. A list of all forms appears with a brief description. If you know the name or part of the name of the form, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the form, select it and click **Select**. You return to the properties screen.
ContextType	Identifies the action ContextType. You can select “PageContext,” “None,” “PageExpressionField,” “Expression,” “SectionField,” and “SearchListReturnValue.” For information about context types, see Select ContextType on page 93.
PageExpressionField	If you select “PageExpressionField” in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select “Expression” in the **ContextType** field, you must select the Expression to use.
SectionField	If you select “SectionField” in the **ContextType** field, you must select the SectionField to use. This is a field in the section to use as the context ID.
SearchListReturnValue	If you select “SearchListReturnValue” in the **ContextType** field, you must select the SearchListReturnValue to use. The search list locates the record to use as the action’s context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.
DefaultValues	Allows you to specify default values for fields on the data form. When users open the form, your default values appear in the fields. To select a code table entry as a default value, enter the database ID for that field in the code table.

ShowDataForm

The “ShowDataForm” ActionType option allows users to view or edit a data form. For example, users can edit information in the **Phone numbers** section of the Contact tab in a constituent record because an **Edit** action is included on the tab. The Edit action allows for a “ShowDataForm” in the **ActionType** field and the “PhoneEditForm” in the **DataForm** field.

When you select the” ShowAddDataForm” **ActionType** on a properties screen, a **DataForm** frame appear with the following options

Screen Item	Description
DataForm	The program comes with several predefined DataForms. In addition, if you create DataForm files and save the files to the bin directory in the program's Deploy folder, you can access these DataForms from this field. To access a list, click the ellipsis button in the **DataForm** field. The Search screen appears. To view a list of all forms available, click **Search**. A list of all forms appears with a brief description. If you know the name or part of the name of the form, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the form, select it and click **Select**. You return to the properties screen.
ContextType	Identifies the action ContextType. You can select "PageContext," "None," "PageExpressionField," "Expression," "SectionField," and "SearchListReturnValue." For information about context types, see Select ContextType on page 93.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the Expression to use.
SectionField	If you select "SectionField" in the **ContextType** field, you must select the SectionField to use. This is a field in the section to use as the context ID.
SearchListReturnValue	If you select "SearchListReturnValue" in the **ContextType** field, you must select the SearchListReturnValue to use. The search list locates the record to use as the action's context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.

ShowPage

The "ShowPage" ActionType option allows users to access a page by clicking a link. For example, in the profile summary section included in a constituent record, constituency information displays as links, taking users to constituency-specific pages, such as the constituent's spouse's record. The action in this sections is set for "ShowPage" in the **ActionType** field and "Constituent Page" in the **Page** field.

When you select the" ShowPage" **ActionType** on a properties screen, a **Page** frame appears with the following options

Screen Item	Description
Page	The page where the link takes the user. To access a list of available pages, click the ellipsis at the end of the **Page** field. The Search screen appears. To view a list of all pages available, click **Search**. A list of pages appears with a brief description. If you know the name or part of the name of the page, enter the information in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the page, select it and click **Select**. You return to the properties screen
Tab	Default tab for the page (if tabs are included in the page design). If no tab is selected, the first tab listed serves as the default.
ContextType	Identifies the action ContextType. You can select "PageContext," "None," "PageExpressionField," "Expression," "SectionField," and "SearchListReturnValue." For information about context types, see

Screen Item	Description
	"Context Types" on page 45.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the **PageExpressionField** to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the **Expression** to use.
SectionField	If you select "SectionField" in the **ContextType** field, you must select the **SectionField** to use. This is a field in the section to use as the context ID.
SearchListReturnValue	If you select "SearchListReturnValue" in the **ContextType** field, you must select the **SearchListReturnValue** to use. The search list locates the record to use as the action's context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.

ShowReport

The "ShowReport" ActionType option allows users to access a report by clicking a link. For example, on your Campaign page you may want to add a link to your Appeal Profile Report. When a user clicks the new **Reports** button, an up-to-date version of the Appeal Profile Report opens. For this scenario you would select "ShowReport" in the **ActionType** field and "Appeal Profile" (or whatever the name of the desired report is) in the **Report** field.

When you select the "ShowReport" **ActionType** on a properties screen, a **Report** frame appears with the following options

Screen Item	Description
Report	Select the report to associate with the new action. If you create report parameter files and save the files to the bin directory in the Deploy folder, you can access these reports from this field. To access a list of saved report parameter files, click the ellipsis button in the **Reports** field. The Search screen appears. To view a list of all reports available, click **Search**. A list of all report parameter files appears. If you know the name or part of the name of the report to use, enter it in the **Name** field and click **Search**. After you find the report, select it and click **Select**. You return to the properties screen.
Caption	Name of the link for users to click to execute the report.
CaptionResourceKey	Identifies the resource file containing the strings required for localization.
ShowInNewWindow	Open the report in a new window: False = report opens in the program window; True = report opens in a separate window.
DisplayPromptArea	The prompt, if displayed, appears at the top of the **Report** section and includes prompts related to generating the selected report. For example, if you select the Campaign Progress Report and select to display prompts, a **Goal** field appears at the top of the Report section. False = not visible; True = visible.
DisplayDocumentMap	The document map is a separate pane that displays a list of headings in the document. You can use the document map to quickly navigate through the document. False = not visible; True = visible.
Display Toolbar	Displays the Reports toolbar in the section. False = not visible; True =

Screen Item	Description
	visible.
ExportType	Select a file format for export files.
Parameters	Enter the parameter values for the section. Click the ellipsis at the end of the field to access the Parameters screen. For information about how to define parameters, see Define Parameters on page 91.

StartBusinessProcess

The "StartBusinessProcess" ActionType option allows users to execute a process. For example, you can add a *WealthPoint* search business process to your constituent record, allowing users to search *WealthPoint* for information on the constituent.

When you select the "Start Business Process" **ActionType** on a properties screen, a **Business Process** frame appears with the following options.

Screen Item	Description
Business Process	Select the business process to associate with the new action. The program includes a number of standard business processing option. In addition, if you create processing files and save the files to the bin directory in the program's Deploy folder, you can access these processes from this field. To access a list of saved files, click the ellipsis button in the **BusinessProcess** field. The Search screen appears. To view a list of all processes available, click **Search**. A list of all files appears. If you know the name or part of the name of the process to use, enter it in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the file, select it and click **Select**. You return to the properties screen.
StatusPage	Status page, it any, associated with the business process. For example, if you add an Acknowledgement Process, you can include the Acknowledgement Process Page, which tracks the progress of the Acknowledgement Process.
PreProcessEditForm	Form allows you to edit information to be used in the business process. For example, if you add a WealthPoint Search Process to your constituent records, you can select the WealthPoint Search Process Edit form, allowing user to edit search process criteria.
ContextType	Identifies the action ContextType. You can select "PageContext," "None," "PageExpressionField," "Expression," "SectionField," and "SearchListReturnValue." For information about context types, see "Context Types" on page 45.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the **PageExpressionField** to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the **Expression** to use.
SectionField	If you select "SectionField" in the **ContextType** field, you must select the **SectionField** to use. This is a field in the section to use as the context ID.
SearchListReturnValue	If you select "SearchListReturnValue" in the **ContextType** field, you must select the **SearchListReturnValue** to use. The search list locates the record to use as the action's context ID.
IDMapper	Mapping used from the ContextID to a value associated with another record type.

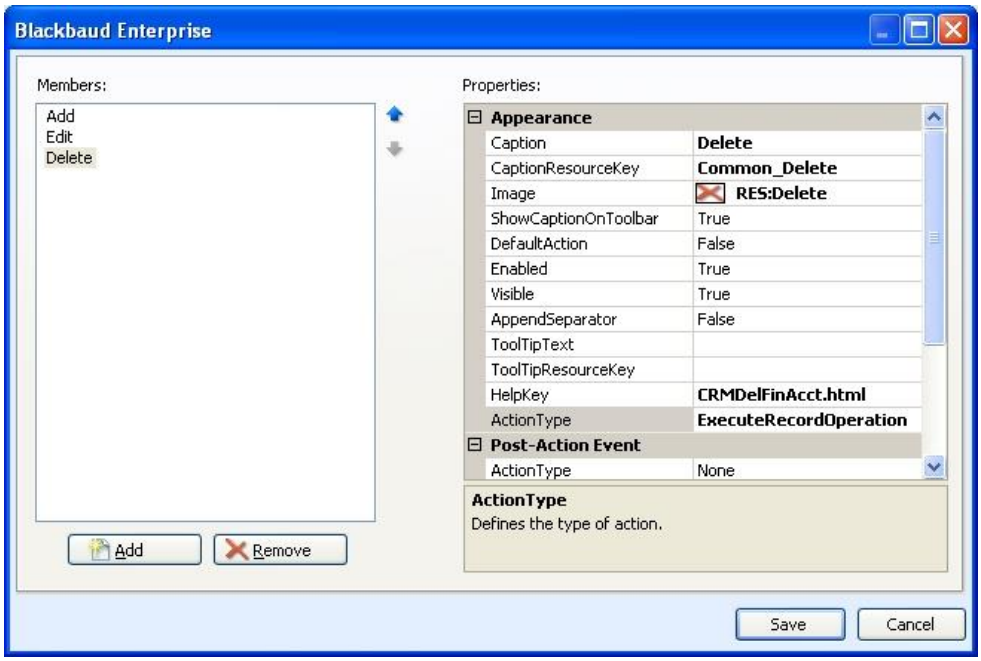
ActionGroup

The “ActionGroup” ActionType option allows you to create a group of actions. For example, while working in the Jobs With Openings page in *Volunteers*, you find you often must access the Job Listings page, Job Occurrence schedule page, Volunteer Skill Level page, and Volunteer Type page. Using the ActionGroup option, you can create a drop-down menu on the Jobs With Openings page section that includes links to all the pages you need.

Create an action group ActionType for a page section

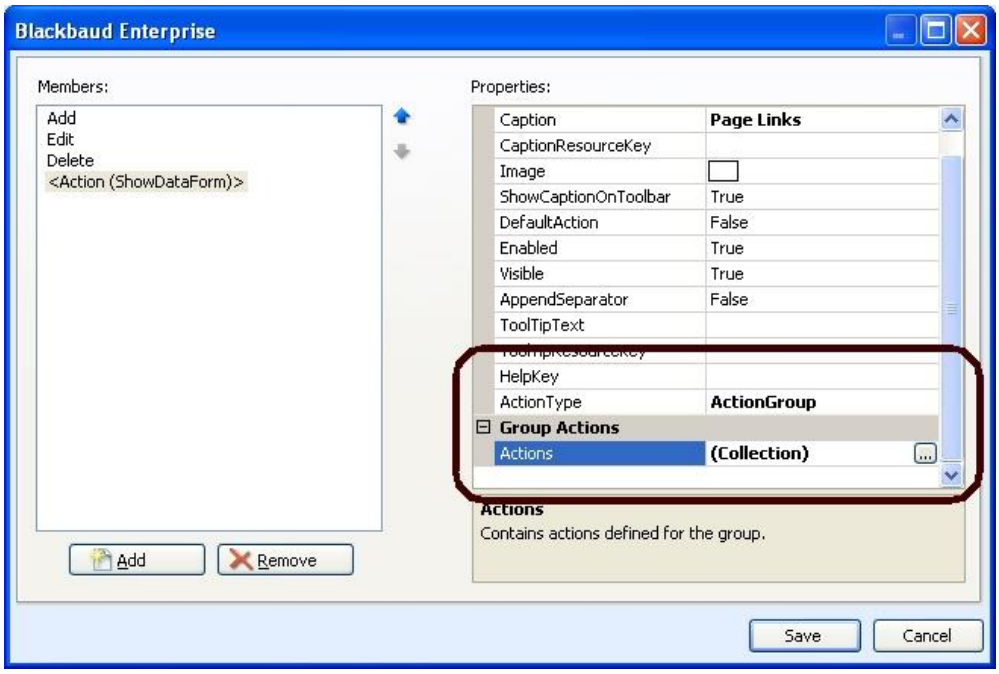
1. Activate **Design Mode**. For information about how to activate **Design Mode**, refer to Activate Design Mode on page 5.
2. On the page section to add an action group to, click the **Edit Actions** button. For example, to add a group of actions to the **Financial Accounts** section on the Accounts tab in a constituent record, locate the **Financial Accounts** section on the tab, and click the **Edit Actions** button that displays in the tab.

   A screen appears displaying the sections’s existing actions.

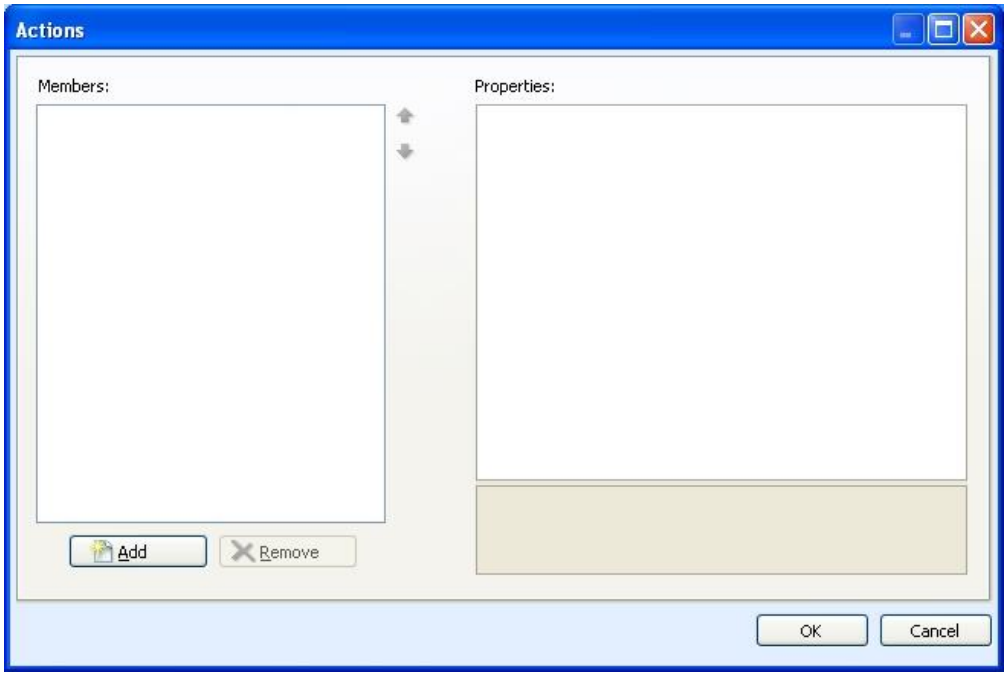


3. To add a new action group, click **Add**. A blank **Properties** box appears on the right.
4. Complete all the necessary fields in the **Appearance** frame. At the **ActionType** field, select “ActionGroup.” A **Group Actions** frame containing an **Actions** field appears in the **Properties** box.

   For more information about these fields, refer to Actions Property Screen on page 1.
5. Click the Ellipsis at the end of the **Actions** field.



A blank Actions screen appears.



6. Click **Add**. A grid appears in the **Properties** box.
7. To add your first action to the group, complete the grid in the **Properties** box.

   For information about the fields in this grid, refer to Actions Property Screen on page 1.
8. Repeat steps 6 and 7 until you have added all the desired actions to your action group.
9. Click **OK** to return to the page section action properties screen.
10. Click **Save** to save your changes and add the new action group to the page section.

Post-Action Event Frame

The drop-down menu in the **ActionType** field that appears in the **Post-Action Event** frame of the Actions screen includes several options, allowing you to select what occurs after the action is executed. For example, in the **Phone numbers** frame of the Contact tab on a constituent record, you can **Add** phone numbers. After the new phone information is added to the dataform, when your users click **OK**, the **Post-Action Event** calls for the program to "Refresh the Page." This refreshes the constituent page to include the new phone information.

When you select an **ActionType** in the **Post-Action Event** frame, the options included in the frame change based on your selection. For example, if you select the "GoToSpeicficPage" **ActionType**, a **Page** field appears so you can select the page.

The following table lists all available Post-Actions Events, the action executed, and any additional fields that appear.

Post-Action Event	Action	Additional Fields
None	No post-action taken.	None
GoHome	Takes the user to the program's Home page.	None
GoToPreviousPage	Takes the user to the page they occupied just before executing the action. For example, you are on the Search screen; you open a constituent record and edit a phone number and the **Edit** action properties are assigned the "GoToPreviousPage" post-action. After you save your changes on the Edit screen, you return to the Search screen.	None
GoToFunctionalArea	Takes the user to a functional area. For example, you open a constituent record and add a new phone number and the **Add** action properties are assigned the "GoToFunctionalArea" post-action with **Functional Area** = "Constituent." After you save your new phone number on the Add screen, the program takes you to the Constituent page.	**FunctionalArea**: Select the functional area in the program to take users to after they execute the action. Functional areas are created and maintained in **Shell Design**, accessed from *Administration*. For more information about how to work with functional areas, see Functional Area Management on page 31.
GoToSpecificPage	Takes the user to a page. For example, you open a constituent record and add a new phone number and the **Add** action properties are assigned the "GoToSpecificPage" post-	**Page**: Select the page in the program to take users to after they execute the action. Pages are created and maintained in **Shell Design**, accessed from Configuration. For more information about how to work with pages, see Page Management on page 43.

Post-Action Event	Action	Additional Fields
	action with **Page** = "Constituent Page." After you save your new phone number on the Add screen, the program takes you to the Constituent page.	**PostActionContextType**: Identifies the action ContextType. You can select "PageContext," "None," "PageExpressionField," "Expression," "SectionField," and "SearchListReturnValue." For information about context types, see "Context Types" on page 45. **PostActionContextPageExpressionField**: If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use. **PostActionContextExpression**: If you select "Expression" in the **ContextType** field, you must select the Expression to use. **PostActionContextSectionField**: If you select "SectionField" in the **ContextType** field, you must select the SectionField to use. This is a field in the section to use as the context ID. **PostActionContextSearchList**: If you select "SearchListReturnValue" in the **ContextType** field, you must select the SearchListReturnValue to use. The search list locates the record to use as the action's context ID. **PostActionContextIDMapper**: Mapping used from the ContextID to a value associated with another record type.
RefreshPage	Refreshes the page from which you executed the action.	None
RefreshSection	Refreshes the page section from which you executed the action.	None

Define Actions

The **Actions** field appears on the Properties screen and defines any action included in the section or tab.

For example, in the program **Add**, **Edit**, and **Delete** are actions available on the Financial Accounts tab of a constituent record. If you open the Financial Accounts tab properties screen, you can access the actions' properties, by clicking the ellipsis at the end for the **Actions** field.

Note: For information about actions, see Actions on page 3.

You can also define actions by clicking the **Edit Actions** button that appears at the top of a section or tab when the program is in **Design Mode**. For more information about **Edit Actions**, see Edit Action Properties on page 22.

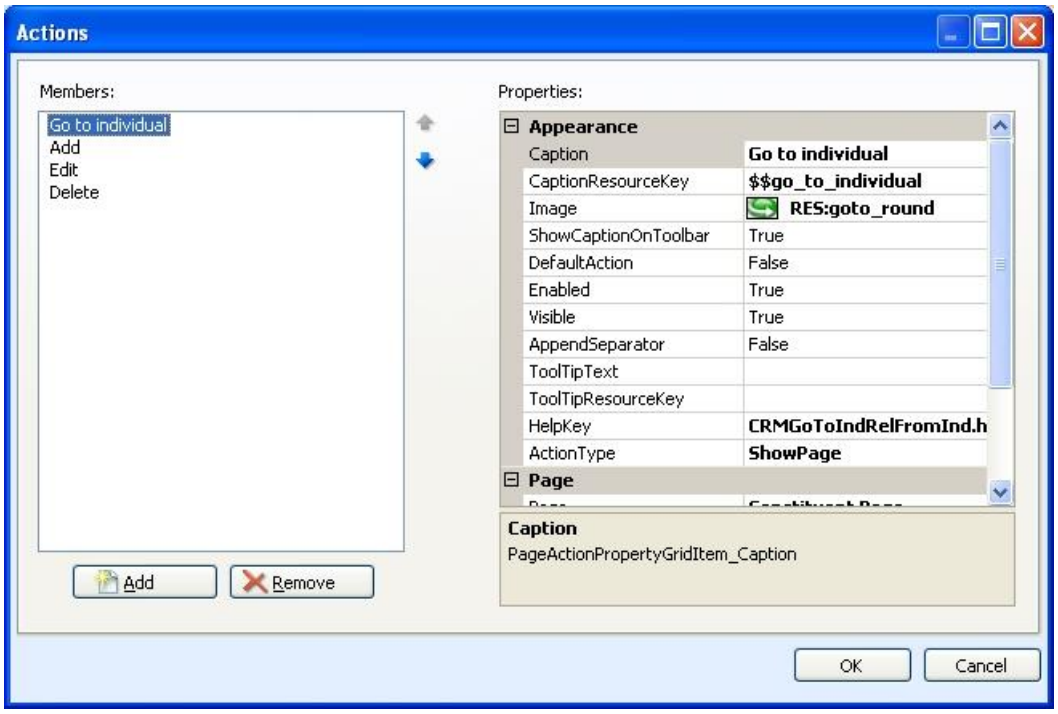
Define a new action

1. From the section or tab properties screen, click the ellipsis at the end of the **Action** field in the **Section Actions** frame.

   For example, to add an action to the **Relationships - Individual** section on the Relationships tab of a constituent record, click the **Properties** button in the **Relationships -Individual** section of this tab. Locate the **Action** field in the **Section Actions** frame and click the ellipsis. The Actions screen appears displaying any existing actions.

   You can also access the action screen by click the **Edit Actions** button that appears at the top of a section or tab when the program is in **Design Mode**.

Note: For information about how to activate the **Design Mode**, see Activate Design Mode on page 5.



2. To add an action, click **Add**. A new grid appears in the Properties box.

   For information about the fields in the **Properties** box, refer to Actions Property Screen on page 1.

Note: To make changes to an existing action, select the action in the **Members** box, and a grid appears in the **Properties** box allowing you to change your action properties. To delete an action, select the action in the **Members** box and click **Remove**.

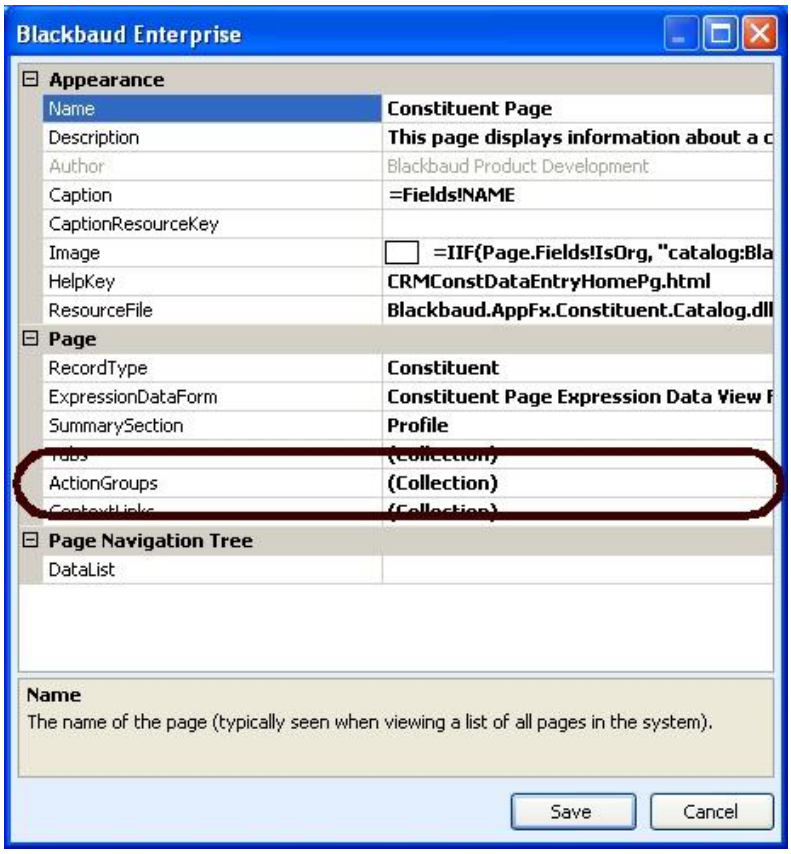
3. If creating a new action, when you finish defining one action, click **Add** to add another action.
4. When you finish, click **OK**.

Define Action Groups

The **ActionGroups** field appears on the Page Properties screen and defines any action groups included on the page.

For example, in the program, the default action groups on a constituent record are **Tasks**, **View as**, and **More information**. The groups appear in the pane to the left of your screen.

Note: For information about action groups, see Actions on page 3.



You can also define action groups by clicking the **Edit Action Groups** button that appears at the top of a page when the program is in **Design Mode**. For more information about **Edit Action Groups**, see Edit Action Groups on page 15.

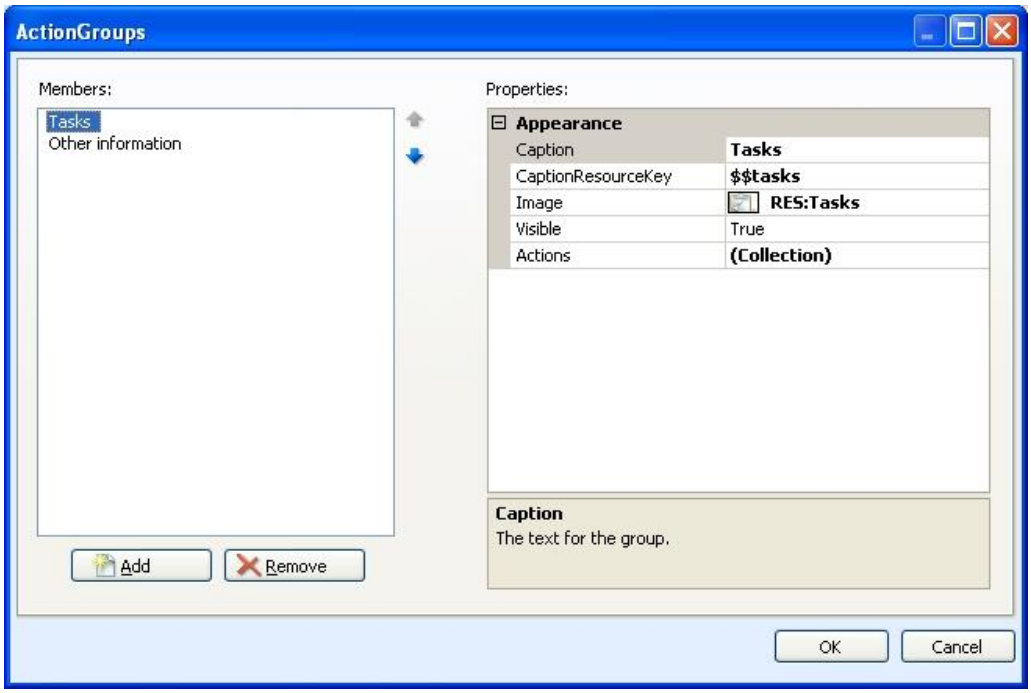
Define a new action group

1. From the page properties screen, click the ellipsis at the end of the **ActionGroups** field in the **Page** frame. The ActionGroups screen appears, displaying any existing action groups.

   For example, to add an group action to the constituent page, click the **Page Properties** button at the top of the page. Locate the **ActionGroups** field in the **Page** frame and click the ellipsis. The ActionGroups screen appears displaying any existing groups.

   You can also access the ActionGroups screen by click the **Edit Action Groups** button that appears at the top of a page when the program is in **Design Mode**.

Note: For information about how to activate **Design Mode**, see Activate Design Mode on page 5.



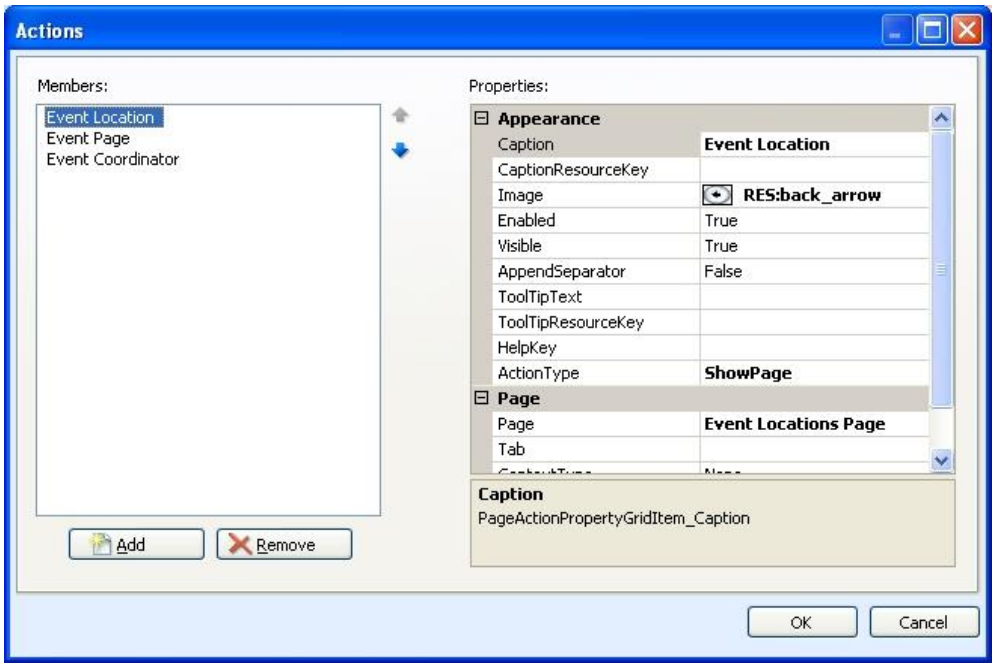
2. To add a new action group, click **Add**. A blank **Properties** box appears on the right.

Note: To make changes to an existing action group, select the group in the **Members** box, and a grid appears in the **Properties** box allowing you to change your action group properties. To delete an action group, select the group in the **Members** box and click **Remove**.

3. In the **Caption** field, enter a name for the new action group.
4. In the **CaptionResourceKey** field, if your organization localizes the program for other languages, identify the resource file containing the strings required for localization.
5. In the **Image** field, select an image to include with the action group caption.
6. In the **Visible** field, you can select "True" to display the action group or "False" to hide the group.

Note: For more information about the **Image** field, see Select Images on page 60.

7. In the **Actions** field, click the ellipsis at the end of the field. The Actions screen appears, allowing you to create the actions to include in your group.

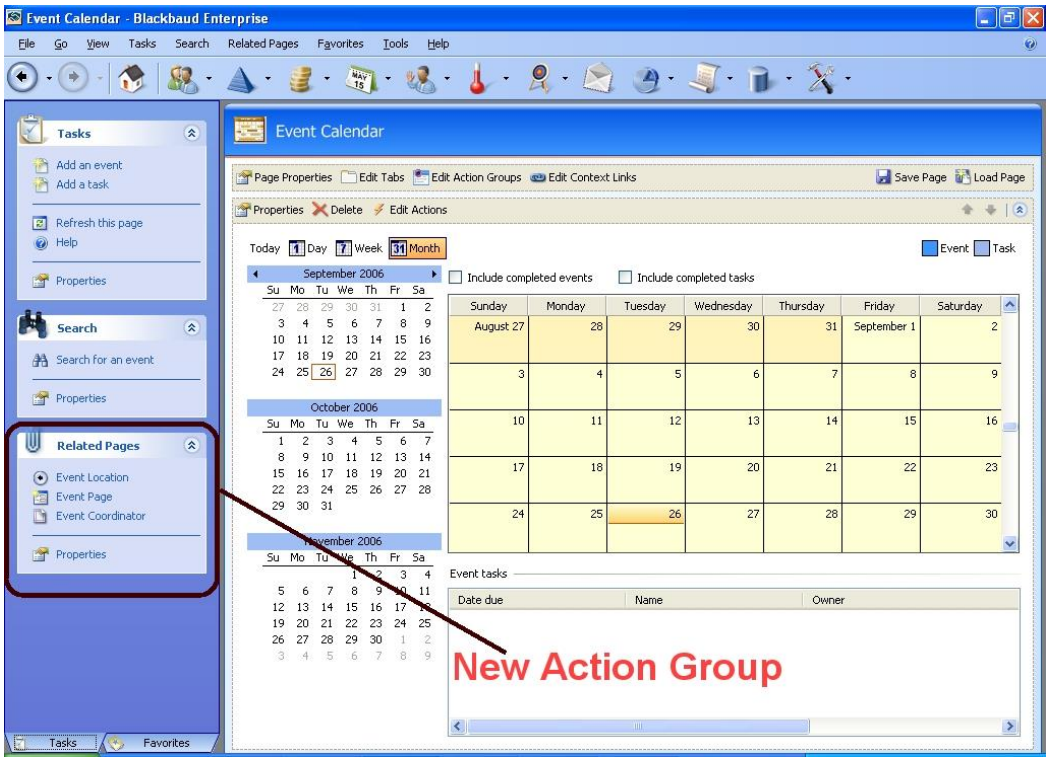


8. To add an action, click **Add.** A grid appears in the **Properties** box.

Note: To make changes to an existing action, select the action in the **Members** box, and a grid appears in the **Properties** box allowing you to change your action properties. To delete an action, select the action in the **Members** box and click **Remove**.

9. Complete the fields necessary to define your new action. For information about the fields on this screen, see Actions Screen Properties for Groups on page 87.
10. When you finish defining one action, click **Add** to add another action to the group, or click **OK** to save the group and return to the ActionGroups property screen.

    For example, in the illustration above, we added three actions to our action group: Event Location, Event Page, and Event Coordinator. We are adding this group to our Event Calendar page. After it is added, we can click the **Event Location** link to access the program's Event Locations Page; **Event Page** to access the program's Event Page; and **Event Coordinator** to access the program's Event Coordinator page.



11. From the ActionGroups property screen, click **Save.**

Actions Screen Properties for Groups

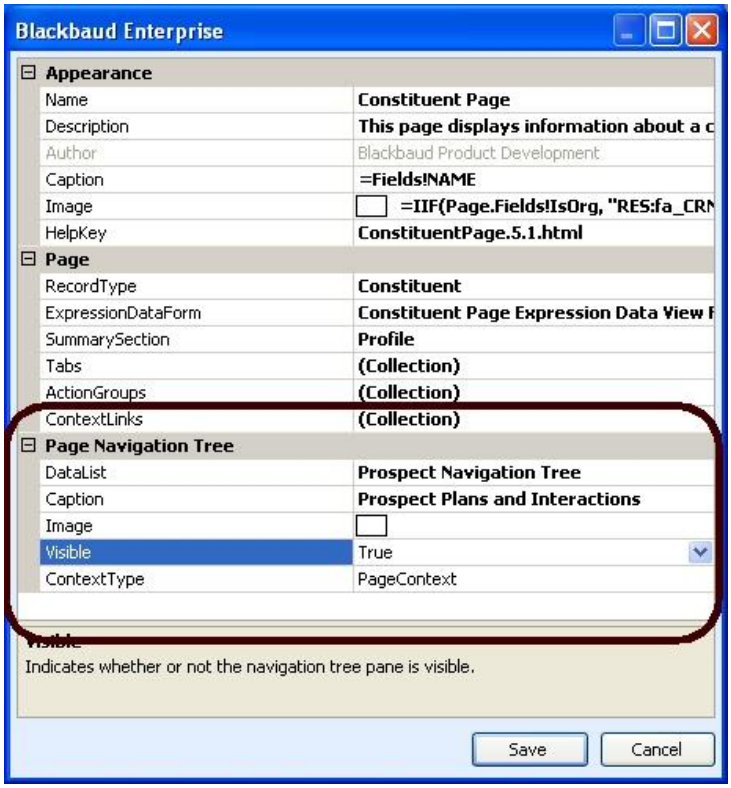
You access the Actions screen from the **Actions** field on the GroupActions screen.

Screen Item	Description
Caption	Name of the action.
Caption ResourceKey	Identifies the resource file containing the strings required for localization.
Image	Name and icon associated with any selected image. For information about how to select images, see Select Images on page 60.
Enabled	Is the action enabled in the section: False = not enabled; True = enabled.
Visible	Is the action visible in the section: False = not visible; True = visible.
AppendSeparator	Is a separator appended to the action, setting it off from other actions on the action bar: False = not visable; True = visable.
ToolTipText	Text included in the tooltip (if any) associated with the action button. To add an expression, click the ellipsis button at the end of the field. The Expression screen appears.
ToolTip ResourceKey	Identifies the resource file containing the strings required for localization.
HelpKey	Location and file name of the document containing help information related to this section. Users can then access the help document by clicking the **Help** icon. If you store the file in the program's standard help directory, you do not have to enter the location information, just the file

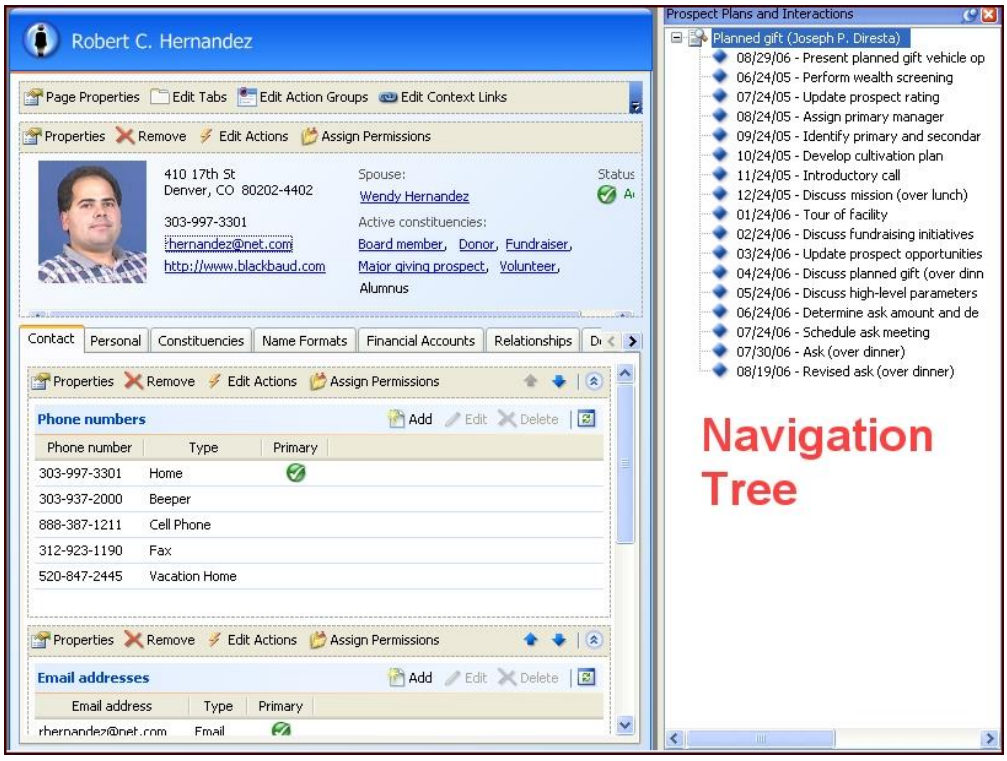
Screen Item	Description
	name.
ActionType	The type of action to execute when a user clicks the action link/button. The fields available on the properties screen change based on the **ActionType**. For information about **ActionTypes**, see Define ActionTypes on page 72.

Define Page Navigation Trees

The **Page Navigation Tree** frame appears on the page properties screen and defines any navigation trees included on the page.



Navigation trees display a hierarchical set of links to other pages. Although similar to the ContextLinks feature, the navigation tree allows you to see the “big picture” rather than a single path. For example, you can provide a broader view of a constituent by displaying links to all planned gifts associated with the constituent record.



The navigation tree panel is collapsed to the right side of the screen. A button appears, displaying the name you entered in the **Caption** field of the properties screen. To expand the panel, hover your cursor over the button. You can resize the panel or pin it, making it always visible. You can also toggle the visibility of the navigation tree by selecting the **Navigation tree** menu option from the **View** menu.

To refresh the navigation tree:

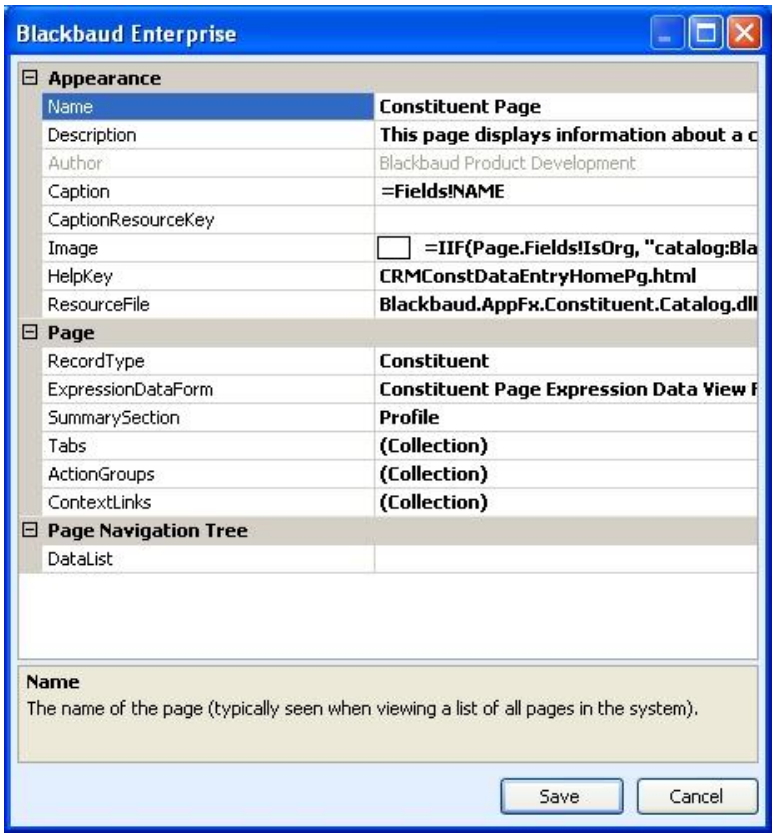
- Click **Refresh this page** in the **Task** pane
- Execute a post-action event of “Refresh Page”
- Visit a new page with a different navigation tree datalist (or contextID)

At the page level, you have control over the navigation tree caption, image, datalist, visibility, and context ID for the datalist. Each of these can be expressions.

Define a navigation tree

1. With the program in **Design Mode**, from the location to add a navigation tree, click **Page Properties**.

   For example, to add a navigation tree to your constituent records, open a constituent record, activate **Design Mode**, and click **Page Properties**. A screen appears with the design properties for the page.



2. In the **Page Navigation Tree** frame, in the **Datalist** field, click the drop-down arrow at the end of the field.
3. To create an expression defining your navigation tree, select “Expression.” The Expression screen appears. For more information, see Use Expressions In Design Mode on page 59.

   To select an existing Datalist, select “Browse.” The Datalist Search screen appears.

   - To view a list of all available Datalists, click **Search**. A list of all files appears.
   - If you know the name or part of the name of the Datalist to use, enter it in the **Name** field and click **Search**.
   - You can also restrict your search based on **Record type**.
   - After you find the Datalist, select it and click **Select**. You return to the properties screen.
4. After you select a Datalist, a number of additional fields appear in the **Page Navigation Tree** frame. Complete the necessary fields. For information about the fields, see Page Navigation Tree Properties Frame on page 90.
5. Click **Save**. You return to the program page.

Page Navigation Tree Properties Frame

When you select a **Datalist** in the **Page Navigation** frame in **Page Properties**, a number of additional fields appear, allowing you to define your navigation tree.

Screen Item	Description
Datalist	The program comes with several predefined Datalists. In addition, if you create Datalist files and save the files to the bin directory in the program's Deploy folder, you can access these files from this field. To access a lists of all existing Datalists, select the <Browse> option in the **Datalist** field. A search screen appears. To view a list of all Datalists available, click **Search**. A list of all Datalists appears with a brief description. If you know the name or part of the name of the list to use, enter it in the **Name** field and click **Search**. You can also restrict your search based on **Record type**. After you find the Datalist, select it and click **Select**. You return to the properties screen. You can also create an Expression datalist by selecting <Expression> in the **Datalist** field. For more information, see Use Expressions In Design Mode on page 59.
Caption	Name assigned the navigation tree. This displays on the button that appears when the navigation panel is collapsed.
CaptionResourceKey	Identifies the resource file containing the strings required for localization.
Image	Name and icon associated with any selected image The image you select, if any, appears with the caption. For information about how to select images, see Select Images on page 60.
Visible	Visibility status of the navigation tree: False = not visible; True = visible.
ContextType	Context of the record to display in this Datalist. Most Datalists require a "PageContext." You can also select a "PageExpressionField" or "Expression."
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use.
Expression	If you select "Expression" in the **ContextType** field, you must select the Expression to use.

Define Parameters

Parameters are numeric or string values used to modify an expression. From **Design Mode**, you can define parameter values when working in the CustomComponent and Report **SectionType** and in the ShowReport **ActionType**.

Warning: Working with parameters requires some knowledge of SQL.

Define parameters

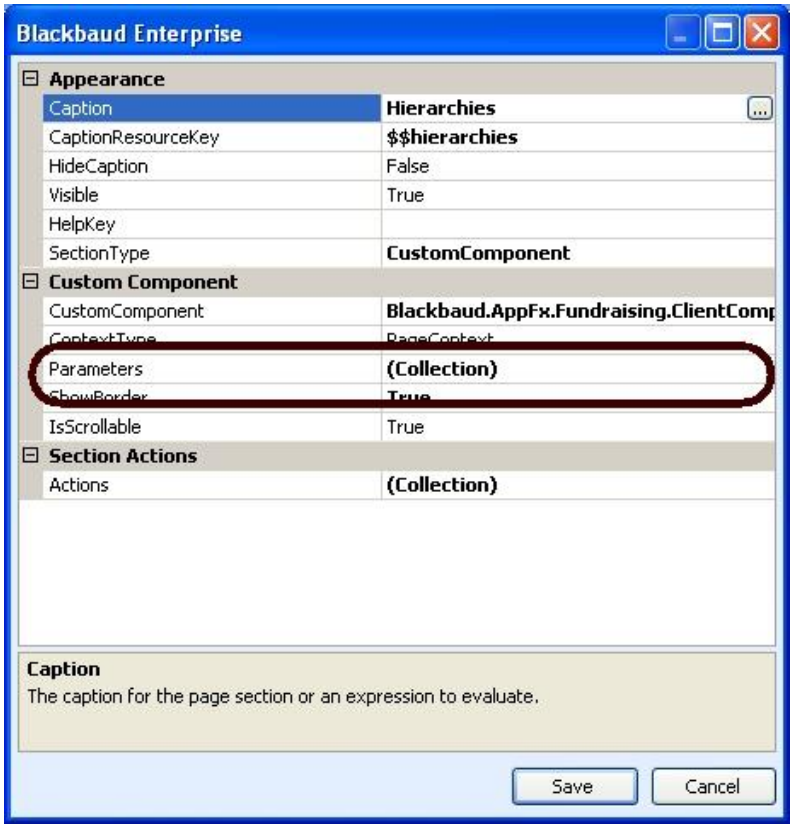
1. With the program in **Design Mode**, from the location to define parameter settings for, click the **Properties** button. A screen appears with the properties settings for the area.

   For example, you can edit the parameter settings used to design the Designations tab of a campaign record in *Fundraising*.

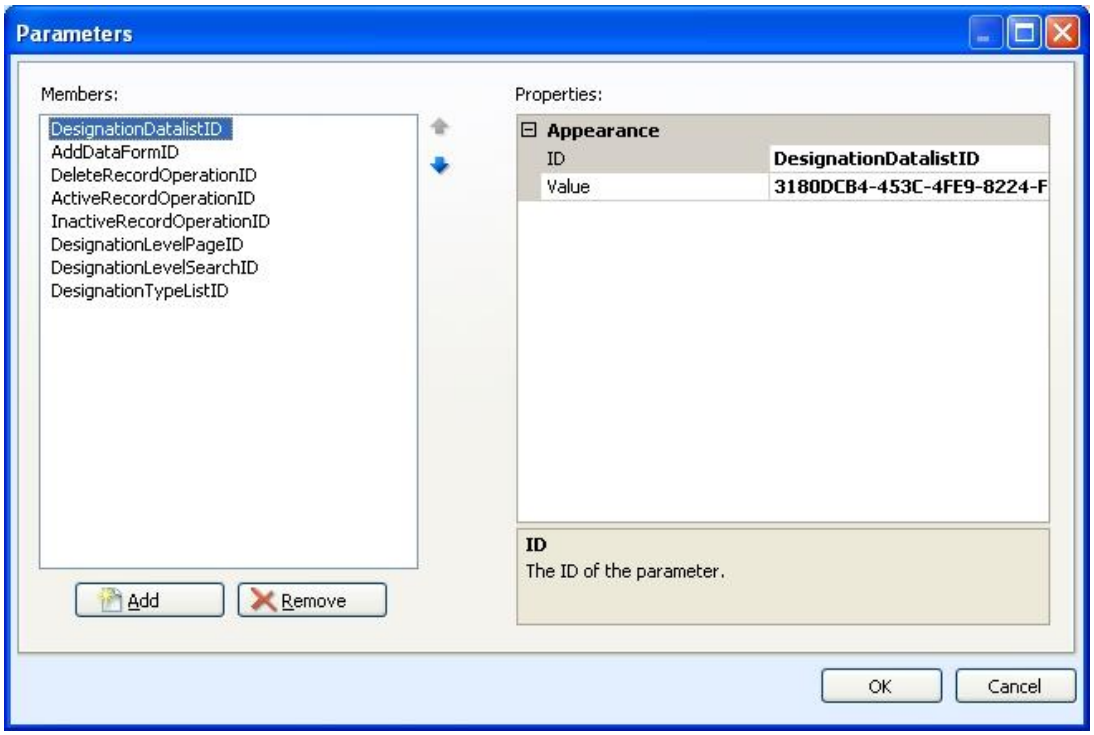
   a. Go to *Fundraising*.

   b. Select **Designation Hierarchies**.

   c. Click **Properties** to open a screen housing the Designations hierarchies design properties. A **Parameters** field appears in the **CustomComponent** section.



2. Click the ellipsis in the **Parameters** field. The Parameters screen appears, displaying any existing parameter settings.



3. To edit an existing parameter, select the parameter in the **Members** box. The properties for the parameter appear in the **Properties** box. Make any necessary changes.

   To add a new parameter, click **Add**. A blank **Properties** box appears, allowing you to enter your parameter settings.

Note: For more information about the Parameters screen, see Parameters Screen on page 93.

   To delete an existing parameter, select it in the **Members** box and click **Remove**. The program deletes the setting.

4. When you finish working on the Properties screen, click **OK**.

Parameters Screen

When you click the ellipsis in the **Parameters** field on a properties screen, the Parameters screen appears, allowing you to define parameter settings to use on the section or action.

Screen Item	Description
ID	ID assigned the parameter.
Value	Value assigned the parameter.
ContextType	Context of the parameter: "PageContext," "PageExpressionField," or "Expression." Appears when defining a "ShowReport" **ActionType**.
PageExpressionField	If you select "PageExpressionField" in the **ContextType** field, you must select the PageExpressionField to use. Appears when defining a "ShowReport" **ActionType**.
Expression	If you select "Expression" in the **ContextType** field, you must select the Expression to use. Appears when defining a "ShowReport" **ActionType**.

Select ContextType

When defining properties in *Design Mode*, most areas require you to select a **ContextType**, identifying the context for the design area.

Select a ContextType

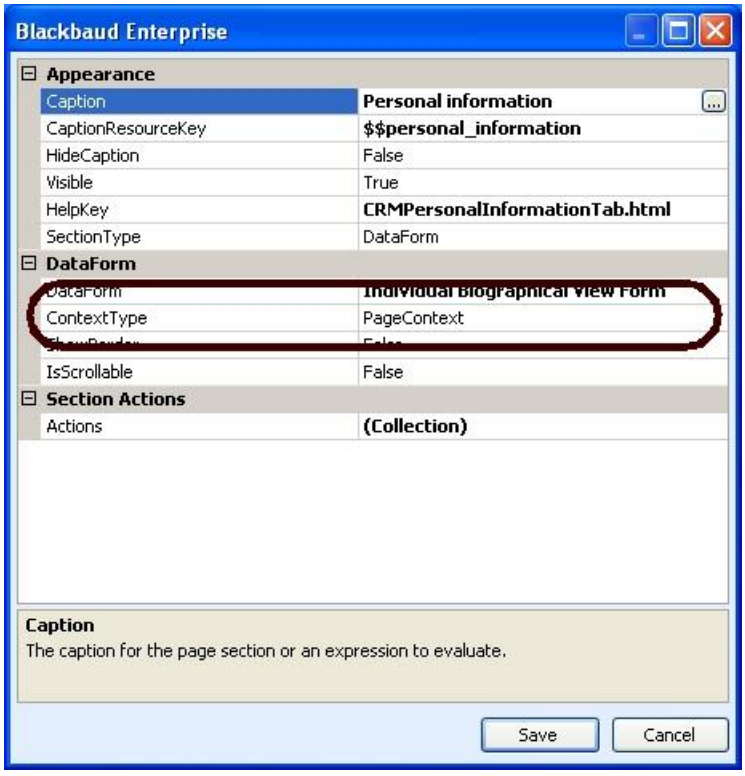
1. With the program in **Design Mode**, from the location to select a ContextType for, click the **Properties** button. A screen appears with the properties settings for the area.

   For example, you can view the **ContextType** used to design the **Personal Information** section of the Personal tab in a Constituent record.

   a. Open a constituent record.

   b. Select the Personal tab.

   c. On the section, click **Properties** to open a screen housing the Personal tab design properties. A **ContextType** field displays on the properties screen.



2. Click the drop-down arrow in the **ContextType** field. A list of available ContextTypes display.
3. When you finish working on the properties screen, click **Save**.

ContextTypes Available

The table below explains the **ContextTypes** available in **Design Mode**.

Screen Item	Description
None	No context type is associated with the area.
PageContext	Provides page access to the area.
PageExpressionField	Field in the page expression form to use as the context ID.
SectionField	Field in the section to use as the context ID.
Expression	Expression to use as the context ID.
SearchListReturnValue	Action context is ID of the record selected from a specific searchlist.