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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.
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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the page. The <strong>Name</strong> is typically seen by users working on the Pages tab in Shell Design in Administration. This tab lists all pages available in the program. For information about Shell Design, see Shell Design on page 29.</td>
</tr>
<tr>
<td>NameUIOverride</td>
<td>Name displayed in the page header. If you do not enter a</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the screen. The Description is typically seen by users working on the Pages tab in Shell Design in Administration. This tab lists all pages available in the program. For information about Shell Design, see Shell Design on page 29</td>
</tr>
<tr>
<td>Author</td>
<td>Identifies the party responsible for creating the page.</td>
</tr>
<tr>
<td>Caption</td>
<td>Title that appears at the top of the page.</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Resource key, if any used to localize the page caption.</td>
</tr>
<tr>
<td>HideCaption</td>
<td></td>
</tr>
<tr>
<td>FavoriteCaption</td>
<td></td>
</tr>
<tr>
<td>FavoriteCaptionResourceKey</td>
<td></td>
</tr>
<tr>
<td>Image</td>
<td>Expression/image that appears at the top of the page. For more information, see Select Images on page 60.</td>
</tr>
<tr>
<td>HideExplorerBar</td>
<td></td>
</tr>
<tr>
<td>HelpKey</td>
<td>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.</td>
</tr>
<tr>
<td>AutoGenerateKpiAction</td>
<td>Automatically generates a key performance indicator (KPI) action. For information about KPIs, see the Reports and KPIs Guide.</td>
</tr>
<tr>
<td>ResourceFile</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>RecordType</td>
<td>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.”</td>
</tr>
<tr>
<td>ExpressionDataForm</td>
<td>Data form to use for expressions created for the page. For more information, see Use Expressions In Design Mode on page 59.</td>
</tr>
<tr>
<td>SummarySection</td>
<td>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.</td>
</tr>
<tr>
<td>ExplorerBarSection</td>
<td></td>
</tr>
<tr>
<td>Tabs</td>
<td>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.</td>
</tr>
<tr>
<td>ActionGroups</td>
<td>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.</td>
</tr>
<tr>
<td>ContextLinks</td>
<td>Context links are page level links providing users easy access.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Page Navigation Tree frame</td>
<td>Defines the navigation tree, if any, included on the page. For information about navigation trees, see Define Page Navigation Trees on page 88.</td>
</tr>
<tr>
<td>Note:</td>
<td>For instructions about how to activate Design Mode, see Activate Design Mode on page 5.</td>
</tr>
</tbody>
</table>

**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.

     ![Edit page tabs screen]

  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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>Name of the tab.</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Resource key, if any, used to localize the tab caption.</td>
</tr>
<tr>
<td>Image</td>
<td>Name and icon associated with any selected image. For information about how to select images, see Select Images on page 60.</td>
</tr>
<tr>
<td>Visible</td>
<td>Visibility status of tab: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Section</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>Name of the action group (i.e., Tasks, View as).</td>
</tr>
<tr>
<td>CaptionResourceFile</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>Image</td>
<td>Name and icon associated with any selected image. For information about how to select images, see Select Images on page 60.</td>
</tr>
<tr>
<td>Visible</td>
<td>Visibility status of action group: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Actions</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Name of the link to appear at the top of the page.</td>
</tr>
<tr>
<td>Label Resource Key</td>
<td>Resource key used to localize the label.</td>
</tr>
<tr>
<td>Visible</td>
<td>Visibility status of the link: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Value</td>
<td>Caption or expression, if any, included with the link.</td>
</tr>
<tr>
<td>CaptionResourceFile</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>ContextID</td>
<td>ID of the field used as a parent-level page context record ID or expression.</td>
</tr>
<tr>
<td>Page</td>
<td>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</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>of the name of the page, enter the information in the <strong>Name</strong> field and click <strong>Search</strong>. You can also restrict your search based on <strong>Record type</strong>. After you find the page, select it and click <strong>Select</strong>. You return to the properties screen.</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>Name used to identify the section.</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>HideCaption</td>
<td>Status of the caption: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Visible</td>
<td>Visibility status of section: False = not visible; True = visible.</td>
</tr>
<tr>
<td>HelpKey</td>
<td>Location and file name of the document containing help information</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>SectionType</td>
<td>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.</td>
</tr>
<tr>
<td>Actions</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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 visible 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.

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

**ToolTipResourceKey**
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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>Name used to identify the section.</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>HideCaption</td>
<td>Status of the caption: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Visible</td>
<td>Visibility status of section: False = not visible; True = visible.</td>
</tr>
<tr>
<td>HelpKey</td>
<td>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.</td>
</tr>
<tr>
<td>SectionType</td>
<td>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.</td>
</tr>
<tr>
<td>Actions</td>
<td>Define any actions (Mark inactive, View related constituent, View as</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>Name of the action (View Related Constituent, View as Board Member, View as Relation).</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>Image</td>
<td>Name and icon associated with the action. For information about how to select images, see Select Images on page 60.</td>
</tr>
<tr>
<td>ShowCaptionOnToolbar</td>
<td>Is the action caption displayed on the toolbar: False = not displayed; True = displayed.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Is the action enabled in the section: False = not enabled; True = enabled.</td>
</tr>
<tr>
<td>Visible</td>
<td>Is the action visible in the section: False = not visible; True = visible.</td>
</tr>
<tr>
<td>AppendSeparator</td>
<td>Is a separator appended to the action, setting it off from other actions on the action bar: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>LinkField</strong></td>
<td>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 <strong>LinkField</strong> is “BOARDMEMBERCONSTITUENT.”</td>
</tr>
<tr>
<td><strong>ToolTipText</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ToolTipResourceKey</strong></td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td><strong>HelpKey</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ActionType</strong></td>
<td>Type of action to execute when a user clicks the action link. The fields available on the properties screen change based on the <strong>ActionType</strong>. For information about <strong>ActionTypes</strong>, see Define <strong>ActionTypes</strong> on page 72.</td>
</tr>
<tr>
<td><strong>Page</strong></td>
<td>Name of the page on which the actions appear.</td>
</tr>
<tr>
<td><strong>Tab</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ContextType</strong></td>
<td>Identifies the action <strong>ContextType</strong>. 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 <strong>ContextType</strong> on page 93.</td>
</tr>
<tr>
<td><strong>PageExpressionField</strong></td>
<td>If “PageExpressionField” is selected in the <strong>ContextType</strong> field, this field displays the PageExpressionField used.</td>
</tr>
<tr>
<td><strong>Expression</strong></td>
<td>If “Expression” is selected in the <strong>ContextType</strong> field, this field displays the Expression used. For more information, see Use Expressions In Design Mode on page 59.</td>
</tr>
<tr>
<td><strong>SectionField</strong></td>
<td>If “SectionField” is selected in the <strong>ContextType</strong> field, this field displays the SectionField used. This is a field in the section to use as the context ID.</td>
</tr>
<tr>
<td><strong>SearchListReturnValue</strong></td>
<td>If “SearchListReturnValue” is selected in the <strong>ContextType</strong> field, this field displays the SearchListReturnValue used. The search list locates the record to use as the action’s context ID.</td>
</tr>
<tr>
<td><strong>IDMapper</strong></td>
<td>Mapping used from the ContextID to a value associated with another record type.</td>
</tr>
<tr>
<td><strong>Source</strong></td>
<td>If you enter an <strong>IDMapper</strong>, the <strong>Source</strong> field appears. Enter the ID to use as the source ID to the IDMapper.</td>
</tr>
</tbody>
</table>

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

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 perform on a constituent record: add, edit, delete. The event page houses all operations you can perform 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.

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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>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.</td>
</tr>
<tr>
<td>Description</td>
<td>Describes the Functional area. It appears in the Description column of the Functional areas tab.</td>
</tr>
<tr>
<td>Image</td>
<td>Name and icon associated with the action. For information about how to select images, see Select Images on page 60.</td>
</tr>
<tr>
<td>SmallImage</td>
<td>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.</td>
</tr>
<tr>
<td>Sequence</td>
<td>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.</td>
</tr>
<tr>
<td>AppendSeparator</td>
<td>Status of separator appended to the area, setting it off from other areas on the page: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Visible</td>
<td>Is the functional area visible: False = not visible; True = visible</td>
</tr>
<tr>
<td>ResourceFile</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>NameResourceKey</td>
<td>Appears if you add a ResourceFile. Identifies the resource key containing the localized functional area Name.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Description ResourceKey</td>
<td>Appears if you add a ResourceFile. Identifies the resource file containing the localization functional area Description.</td>
</tr>
</tbody>
</table>

## 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.

   ![Functional areas table](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Number of Tasks</th>
<th>Sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituents</td>
<td>Provides an interface for managing CRM data.</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>Major Giving</td>
<td>Provides an interface for administering major giving.</td>
<td>15</td>
<td>20</td>
</tr>
<tr>
<td>Revenue</td>
<td>Provides an interface for managing revenue in the system.</td>
<td>54</td>
<td>30</td>
</tr>
<tr>
<td>Reports</td>
<td>Provides an interface for managing reports.</td>
<td>25</td>
<td>50</td>
</tr>
<tr>
<td>Volunteers</td>
<td>Provides an interface for managing volunteers.</td>
<td>12</td>
<td>50</td>
</tr>
<tr>
<td>Fundraising</td>
<td>Provides an interface for administering fundraising initiatives.</td>
<td>6</td>
<td>30</td>
</tr>
<tr>
<td>Mailing</td>
<td>Provides an interface for creating and managing marketing plans.</td>
<td>0</td>
<td>90</td>
</tr>
<tr>
<td>Emails</td>
<td>Provides an interface for creating and managing your mailings.</td>
<td>15</td>
<td>100</td>
</tr>
<tr>
<td>Reports</td>
<td>Explore and run reports.</td>
<td>55</td>
<td>101</td>
</tr>
<tr>
<td>Data</td>
<td>Create Ad-hoc and Smart Queries, Run Reports, and Export data</td>
<td>9</td>
<td>990</td>
</tr>
<tr>
<td>Administration</td>
<td>Provides options for administering the system.</td>
<td>21</td>
<td>1,000</td>
</tr>
</tbody>
</table>

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” Functional Area 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.
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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>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.</td>
</tr>
<tr>
<td>Description</td>
<td>Describes the task. It appears in the Description column of the Tasks tab.</td>
</tr>
<tr>
<td>Image</td>
<td>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.</td>
</tr>
<tr>
<td>SmallImages</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FolderImages</td>
<td>Image, if any, associated with the Folder.</td>
</tr>
<tr>
<td>TaskGroup</td>
<td>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.</td>
</tr>
<tr>
<td>TaskGroupImage</td>
<td>Image, if any, associated with the Task Group.</td>
</tr>
<tr>
<td>Sequence</td>
<td>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.</td>
</tr>
<tr>
<td>FunctionalArea</td>
<td>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.</td>
</tr>
<tr>
<td>HelpKey</td>
<td>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.</td>
</tr>
<tr>
<td>ResourceFile</td>
<td>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.</td>
</tr>
<tr>
<td>NameResourceKey</td>
<td>Appears if you add a ResourceFile. Identifies the resource key containing the localized functional area Name.</td>
</tr>
<tr>
<td>DescriptionResourceKey</td>
<td>Appears if you add a ResourceFile. Identifies the resource file containing the localized functional area Description.</td>
</tr>
<tr>
<td>TaskGroupResourceKey</td>
<td>Identifies the resource file containing the localized TaskGroup name.</td>
</tr>
<tr>
<td>DisplayAsAction</td>
<td>Indicates if the task should display as an action.</td>
</tr>
<tr>
<td>AppendSeparator</td>
<td>Appears if you select “True” for DisplayAsAction. Adds a line separator between actions.</td>
</tr>
<tr>
<td>Visible</td>
<td>Visibility status of the task: True = visible; False = not visible.</td>
</tr>
<tr>
<td>ActionType</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

  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 about how to 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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the page. The name you enter appears in the <strong>Name</strong> column on the Pages tab.</td>
</tr>
<tr>
<td>Description</td>
<td>Describes the page. It appears in the <strong>Description</strong> column of the pages tab.</td>
</tr>
<tr>
<td>Author</td>
<td>Defaults to the system member creating the page.</td>
</tr>
<tr>
<td>Caption</td>
<td>Appears at the top of the new page.</td>
</tr>
<tr>
<td>Favorite Caption</td>
<td>Appears if you add the page to your Favorites.</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Resource key, if any used to localize the page caption.</td>
</tr>
<tr>
<td>Image</td>
<td>Name and icon associated with the page. For information about how to select images, see Select Images on page 60.</td>
</tr>
<tr>
<td>HelpKey</td>
<td>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 <strong>Help</strong> 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.</td>
</tr>
<tr>
<td>AutoGenerateKpiAction</td>
<td>Automatically generates a key performance indicator (KPI) action. For more information about KPIs, see the <strong>Reports and KPIs Guide</strong>.</td>
</tr>
<tr>
<td>ResourceFile</td>
<td>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.</td>
</tr>
<tr>
<td>FavoriteCaptionResourceKey</td>
<td>Resource key, if any used to localize the Favorite caption.</td>
</tr>
<tr>
<td>RecordType</td>
<td>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.”</td>
</tr>
<tr>
<td>ExpressionDataForm</td>
<td>Displays the View Data form to use for expressions on the page.</td>
</tr>
<tr>
<td>SummarySections</td>
<td>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 areas of the program. For more information, see Edit Summary Section Properties on page 24.</td>
</tr>
<tr>
<td>Tabs</td>
<td>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.</td>
</tr>
<tr>
<td>ActionGroups</td>
<td>Action groups are included in the left pane in the program, along with <strong>Tasks</strong> and <strong>Other Information</strong>. 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.</td>
</tr>
<tr>
<td>ContextLinks</td>
<td>Context links are page level links, providing users easy access.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Page Navigation Tree frame</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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.

1. **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.
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.
  
    ![Load Page Definition Screen](image)

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

    ![Open Screen](image)

  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 toolbar. 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 data lists**, 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 data lists**, 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.
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.


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

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.

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.

![Expression Screen](image)

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 advantageous 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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DataForm</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ContextType</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>PageExpressionField</strong></td>
<td>If you select “PageExpressionField” in the ContextType field, you must select the PageExpressionField to use.</td>
</tr>
<tr>
<td><strong>Expression</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ShowBorder</strong></td>
<td>Visibility status of the section border: False = not visible; True = visible.</td>
</tr>
<tr>
<td><strong>IsScrollable</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
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)

Data list Properties

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

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Datalist</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ContextType</strong></td>
<td>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</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PageExpressionField</td>
<td>If you select “PageExpressionField” in the ContextType field, you must select the PageExpressionField to use.</td>
</tr>
<tr>
<td>Expression</td>
<td>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.</td>
</tr>
<tr>
<td>ShowBorder</td>
<td>Visibility status of the section border: False = not visible; True = visible.</td>
</tr>
<tr>
<td>Style</td>
<td>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.</td>
</tr>
<tr>
<td>ExpandFirstLevelNodes</td>
<td>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.</td>
</tr>
<tr>
<td>ExpandAllOnLoad</td>
<td>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.</td>
</tr>
<tr>
<td>ViewDataForm</td>
<td>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.</td>
</tr>
<tr>
<td>Record ID</td>
<td>Appears if you select a ViewDataForm. The ViewDataForm column to use as a source for the record ID.</td>
</tr>
<tr>
<td>HeaderCaption</td>
<td>Appears if you select a ViewDataForm. A header for the new ViewDataForm section.</td>
</tr>
<tr>
<td>Groups</td>
<td>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.</td>
</tr>
<tr>
<td>HeaderBackColor</td>
<td>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.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HeaderGradientBackColor</td>
<td>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.</td>
</tr>
<tr>
<td>CaptionColor</td>
<td>Select a color for your header text.</td>
</tr>
<tr>
<td>AutoSize</td>
<td>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.</td>
</tr>
<tr>
<td>AutoLoadList</td>
<td>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.</td>
</tr>
<tr>
<td>AutoDisplayFilters</td>
<td>Select True for filter controls to appear when the section opens. If you select False, no filters appear.</td>
</tr>
<tr>
<td>Legend</td>
<td>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 &gt; $120 = italic and violet red, pledges = bold and yellow, and gifts &gt; $1000 = green. The change is system-wide not per user.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th><strong>Screen Item</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomComponent</td>
<td>CustomComponent file to use in this section. All CustomComponent files are stored in the bin directory in the program’s Deploy folder.</td>
</tr>
<tr>
<td>ContextType</td>
<td>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.</td>
</tr>
<tr>
<td>PageExpressionField</td>
<td>If you select “PageExpressionField” in the <strong>ContextType</strong> field, you must select the PageExpressionField to use.</td>
</tr>
<tr>
<td>Expression</td>
<td>If you select “Expression” in the <strong>ContextType</strong> field, you must select the Expression to use.</td>
</tr>
<tr>
<td>Parameters</td>
<td>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.</td>
</tr>
<tr>
<td>ShowBorder</td>
<td>Visibility status of the section border: False = not visible; True = visible.</td>
</tr>
<tr>
<td>IsScrollable</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

Matchi$ing Gift Claim Summary

<table>
<thead>
<tr>
<th>Selection</th>
<th>Organization</th>
<th>Amount</th>
<th>Tax</th>
<th>Status</th>
<th>Matched</th>
<th>Pledge</th>
<th>Total</th>
<th>Matched Total</th>
<th>Amount</th>
<th>Tax</th>
<th>Pledge</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>19800127</td>
<td>AAA Company</td>
<td>$500</td>
<td>15%</td>
<td>Sold</td>
<td>$627.50</td>
<td>$0</td>
<td>$0</td>
<td>$627.50</td>
<td>$627.50</td>
<td>$0</td>
<td>$0</td>
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<td>Sold</td>
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<td>$0</td>
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</tr>
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<td>19800131</td>
<td>AAA Company</td>
<td>$500</td>
<td>15%</td>
<td>Sold</td>
<td>$627.50</td>
<td>$0</td>
<td>$0</td>
<td>$627.50</td>
<td>$627.50</td>
<td>$0</td>
<td>$0</td>
<td>$627.50</td>
</tr>
</tbody>
</table>

Reports Properties

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

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report</strong></td>
<td>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.</td>
</tr>
<tr>
<td>Display Prompt Area</td>
<td>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.</td>
</tr>
<tr>
<td>DisplayDocumentMap</td>
<td>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.</td>
</tr>
<tr>
<td>Display Toolbar</td>
<td>Displays the Reports toolbar in the section. False = not visible; True = visible.</td>
</tr>
<tr>
<td>Parameters</td>
<td>Parameter values for the section. Click the ellipsis at the end of the</td>
</tr>
</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DashBoards</td>
<td>Require a PageContext. You can also select a PageExpressionField or Expression. For more information, see Select ContextType on page 93.</td>
</tr>
<tr>
<td>PageExpressionField</td>
<td>If “PageExpressionField” is selected in the ContextType field, this field displays the PageExpressionField used.</td>
</tr>
<tr>
<td>Expression</td>
<td>If “Expression” is selected in the ContextType field, this field displays the Expression used.</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomComponent</td>
<td>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.</td>
</tr>
<tr>
<td>ContextType</td>
<td>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.</td>
</tr>
<tr>
<td>PageExpressionField</td>
<td>If “PageExpressionField” is selected in the ContextType field, this field displays the PageExpressionField used.</td>
</tr>
<tr>
<td>Expression</td>
<td>If “Expression” is selected in the ContextType field, this field displays the Expression used.</td>
</tr>
<tr>
<td>SectionField</td>
<td>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.</td>
</tr>
<tr>
<td>Screen Item</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SearchListReturnValue</td>
<td>If “SearchListReturnValue” is selected in the <strong>ContextType</strong> field, this field displays the SearchListReturnValue used. The search list locates the record to use as the action's context ID.</td>
</tr>
<tr>
<td>IDMapper</td>
<td>Mapping used from the ContextID to a value associated with another record type.</td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RecordOperation</strong></td>
<td>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 <strong>RecordOperation</strong> field. The Search screen appears. To view a list of all operations available, click <strong>Search</strong>. 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 <strong>Name</strong> field and click <strong>Search</strong>. You can also restrict your search based on <strong>Record type</strong>. After you find the operation, select it and click <strong>Select</strong>. You return to the properties screen.</td>
</tr>
<tr>
<td><strong>ShowPrompt</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>ContextType</strong></td>
<td>Identifies the action <strong>ContextType</strong>. You can select “PageContext,” “None,” “PageExpressionField,” “Expression,” “SectionField,” and “SearchListReturnValue.” For information about context types, see Select <strong>ContextType</strong> on page 93.</td>
</tr>
<tr>
<td><strong>PageExpressionField</strong></td>
<td>If you select “PageExpressionField” in the <strong>ContextType</strong> field, you must select the PageExpressionField to use.</td>
</tr>
<tr>
<td><strong>Expression</strong></td>
<td>If you select “Expression” in the <strong>ContextType</strong> field, you must select the Expression to use.</td>
</tr>
<tr>
<td><strong>SectionField</strong></td>
<td>If you select “SectionField” in the <strong>ContextType</strong> field, you must select the SectionField to use. This is a field in the section to use as the ContextID.</td>
</tr>
<tr>
<td><strong>SearchListReturnValue</strong></td>
<td>If you select “SearchListReturnValue” in the <strong>ContextType</strong> 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.</td>
</tr>
<tr>
<td><strong>IDMapper</strong></td>
<td>Mapping used from the ContextID to a value associated with another record type.</td>
</tr>
</tbody>
</table>
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 appears with the following options.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DataForm</td>
<td>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 <strong>Search</strong>. 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 <strong>Search</strong>. You can also restrict your search based on <strong>Record type</strong>. After you find the form, select it and click <strong>Select</strong>. You return to the properties screen.</td>
</tr>
<tr>
<td>ContextType</td>
<td>Identifies the action ContextType. You can select “PageContext,” “None,” “PageExpressionField,” “Expression,” “SectionField,” and “SearchListReturnValue.” For information about context types, see SelectContextType on page 93.</td>
</tr>
<tr>
<td>PageExpressionField</td>
<td>If you select “PageExpressionField” in the ContextType field, you must select the PageExpressionField to use.</td>
</tr>
<tr>
<td>Expression</td>
<td>If you select “Expression” in the ContextType field, you must select the Expression to use.</td>
</tr>
<tr>
<td>SectionField</td>
<td>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.</td>
</tr>
<tr>
<td>SearchListReturnValue</td>
<td>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.</td>
</tr>
<tr>
<td>IDMapper</td>
<td>Mapping used from the ContextID to a value associated with another record type.</td>
</tr>
<tr>
<td>DefaultValues</td>
<td>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.</td>
</tr>
</tbody>
</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 appears 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

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PageExpressionField</td>
<td>If you select “PageExpressionField” in the ContextType field, you must select the PageExpressionField to use.</td>
</tr>
<tr>
<td>Expression</td>
<td>If you select “Expression” in the ContextType field, you must select the Expression to use.</td>
</tr>
<tr>
<td>SectionField</td>
<td>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.</td>
</tr>
<tr>
<td>SearchListReturnValue</td>
<td>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.</td>
</tr>
<tr>
<td>IDMapper</td>
<td>Mapping used from the ContextID to a value associated with another record type.</td>
</tr>
</tbody>
</table>

### 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:

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report</td>
<td>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.</td>
</tr>
<tr>
<td>Caption</td>
<td>Name of the link for users to click to execute the report.</td>
</tr>
<tr>
<td>CaptionResourceKey</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>ShowInNewWindow</td>
<td>Open the report in a new window: False = report opens in the program window; True = report opens in a separate window.</td>
</tr>
<tr>
<td>DisplayPromptArea</td>
<td>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.</td>
</tr>
<tr>
<td>DisplayDocumentMap</td>
<td>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.</td>
</tr>
<tr>
<td>Display Toolbar</td>
<td>Displays the Reports toolbar in the section. False = not visible; True = visible.</td>
</tr>
</tbody>
</table>
### Screen Item | Description
--- | ---
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 options. 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.


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 “GoToSpecificPage” 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.

<table>
<thead>
<tr>
<th>Post-Action Event</th>
<th>Action</th>
<th>Additional Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No post-action taken.</td>
<td>None</td>
</tr>
<tr>
<td>GoHome</td>
<td>Takes the user to the program’s Home page.</td>
<td>None</td>
</tr>
<tr>
<td>GoToPreviousPage</td>
<td>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.</td>
<td>None</td>
</tr>
<tr>
<td>GoToFunctionalArea</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>GoToSpecificPage</td>
<td>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-</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Post-Action Event

<table>
<thead>
<tr>
<th>Action</th>
<th>Additional Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PostActionContextType</strong>: 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.</td>
<td></td>
</tr>
<tr>
<td><strong>PostActionContextPageExpressionField</strong>: If you select “PageExpressionField” in the ContextType field, you must select the PageExpressionField to use.</td>
<td></td>
</tr>
<tr>
<td><strong>PostActionContextExpression</strong>: If you select “Expression” in the ContextType field, you must select the Expression to use.</td>
<td></td>
</tr>
<tr>
<td><strong>PostActionContextSectionField</strong>: 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.</td>
<td></td>
</tr>
<tr>
<td><strong>PostActionContextSearchList</strong>: 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.</td>
<td></td>
</tr>
<tr>
<td><strong>PostActionContextIDMapper</strong>: Mapping used from the ContextID to a value associated with another record type.</td>
<td></td>
</tr>
</tbody>
</table>

**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 clicking 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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caption</td>
<td>Name of the action.</td>
</tr>
<tr>
<td>Caption ResourceKey</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>Image</td>
<td>Name and icon associated with any selected image. For information about how to select images, see Select Images on page 60.</td>
</tr>
<tr>
<td>Enabled</td>
<td>Is the action enabled in the section: False = not enabled; True = enabled.</td>
</tr>
<tr>
<td>Visible</td>
<td>Is the action visible in the section: False = not visible; True = visible.</td>
</tr>
<tr>
<td>AppendSeparator</td>
<td>Is a separator appended to the action, setting it off from other actions on the action bar: False = not visible; True = visible.</td>
</tr>
<tr>
<td>ToolTipText</td>
<td>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.</td>
</tr>
<tr>
<td>ToolTip ResourceKey</td>
<td>Identifies the resource file containing the strings required for localization.</td>
</tr>
<tr>
<td>HelpKey</td>
<td>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</td>
</tr>
</tbody>
</table>
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 dataist (or contextID)

At the page level, you have control over the navigation tree caption, image, dataist, visibility, and context ID for the dataist. 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.

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>ID assigned the parameter.</td>
</tr>
<tr>
<td>Value</td>
<td>Value assigned the parameter.</td>
</tr>
<tr>
<td>ContextType</td>
<td>Context of the parameter: “PageContext,” “PageExpressionField,” or “Expression.” Appears when defining a “ShowReport” ActionType.</td>
</tr>
<tr>
<td>PageExpressionField</td>
<td>If you select “PageExpressionField” in the ContextType field, you must select the PageExpressionField to use. Appears when defining a “ShowReport” ActionType.</td>
</tr>
<tr>
<td>Expression</td>
<td>If you select “Expression” in the ContextType field, you must select the Expression to use. Appears when defining a “ShowReport” ActionType.</td>
</tr>
</tbody>
</table>

### 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**.

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