AVECTRA

10 Things You Can Do in 10 Minutes With The Toolkit

Darryl Hopkins

Nilufer Uslu

Avectra

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Agenda

- Introduction
  - Purpose
  - What is the Toolkit?
- 10 Exercises in 10 Minutes
- Conclusion
- Questions

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Purpose

- **Quick and easy improvements** to your site that you may not know you could do with the Toolkit
- Old and new **tricks** that are not necessarily in the training curriculum
- 10 things to expand our **vision** and explore **possibilities** with the Toolkit

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What is the Toolkit?

- History
  - Before AMS, Avectra built CMS
  - Software to build software
- Concept
  - Everything is a data row in a database table
  - An engine to render this data into a web page
- What does it do?
  - Helps expand database and software to address custom needs
  - Keeps customizations in structure, allows getting new features/bug fixes via upgrades and service packs
- Who uses it?
  - Clients
  - Partners
  - Avectra Developers (R&D, Implementers)

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1 of 10 – Child Forms

- Adding a **Copy Record** Feature to a child form
- BONUS: Two varieties of child form mouseover previews

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Requirement

- Ability to copy an existing organization relationship of an individual

Solution

- Modify individual organization child form
- Add a “copy” link in a child form to allow user to copy an existing record
- Link will open the “Add” page and default certain values based on the record being copied

Modify Child Form

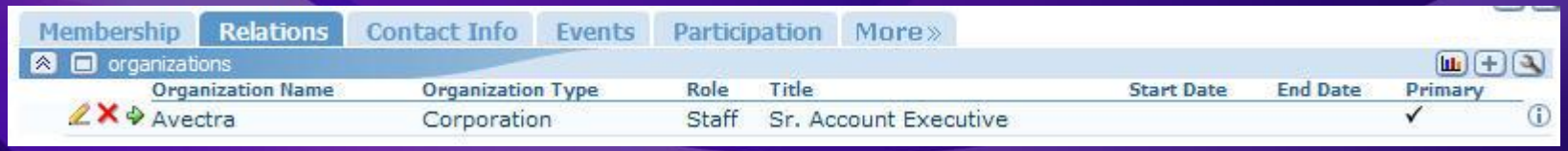
- Save a tiny “copy” GIF file in `/iweb/images/img_copy.gif`
- Modify the Child Form Select SQL:

```
SELECT
org_cst_key,
ixo_key,
[ ] = ' <a href="javascript:OpenNewWindow(''../forms/DynamicEditModal.aspx?' +
                    'Action=Add' +
                    '&FormKey=eb7d8f2c-b258-444b-87d6-1aa2874d4da0' +
                    '&org_name=' + org_name +
                    '&ixo_org_cst_key=' + convert(char(36),ixo_org_cst_key) + ''')">' +
                    '<img border="0" height="16" width="16" alt="copy relationship"
src="../images/img_copy.gif"></a>',
[Organization Name]=case when cst_ixo_key=ixo_key then cst_org_name_dn else
org_name end,
```

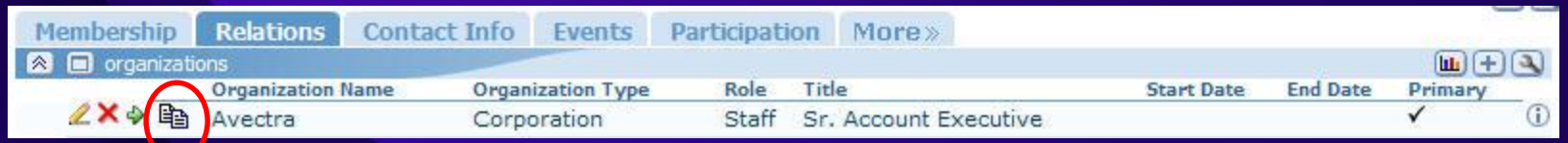
- See wiki for more.

Result

- Before:

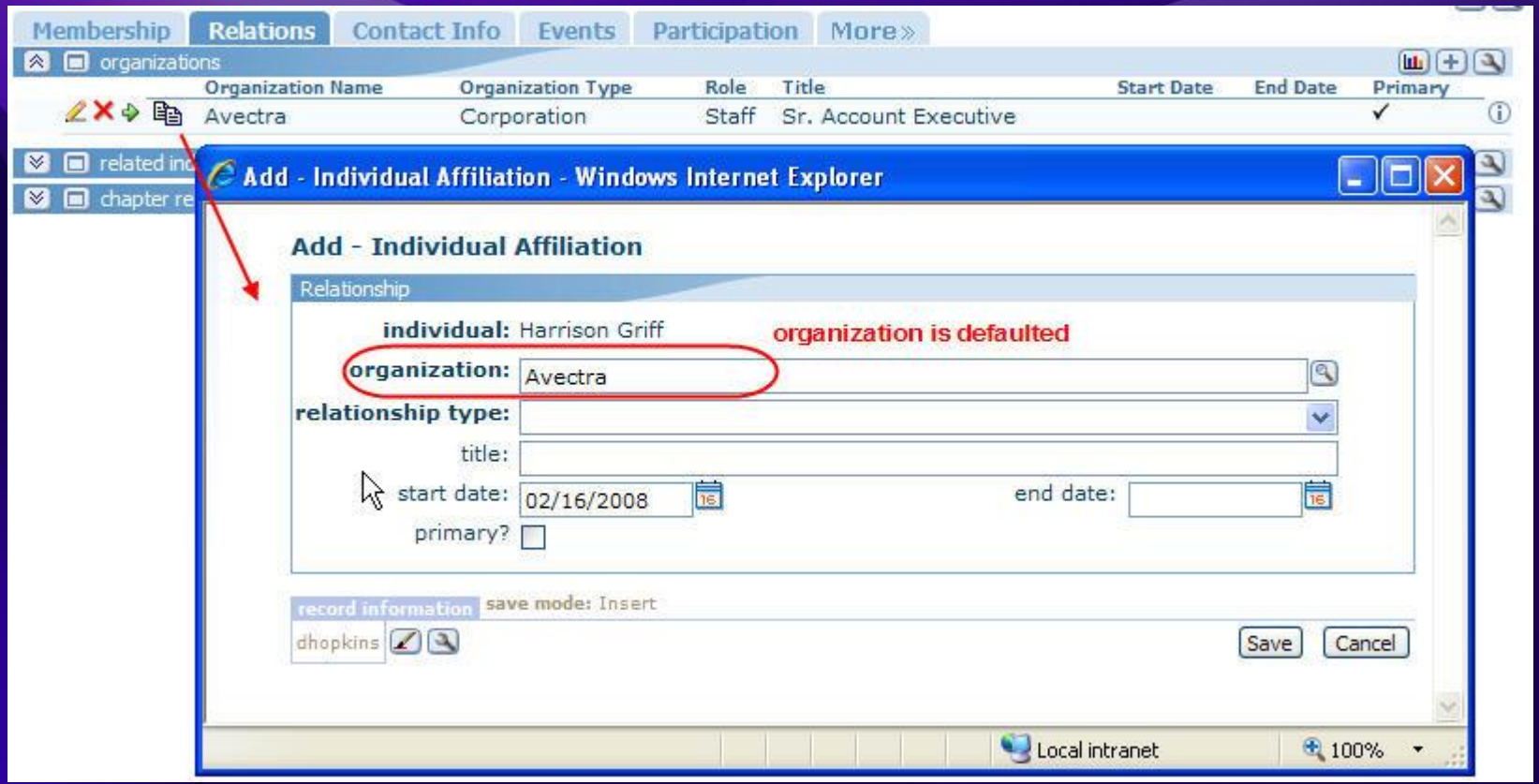


- After:



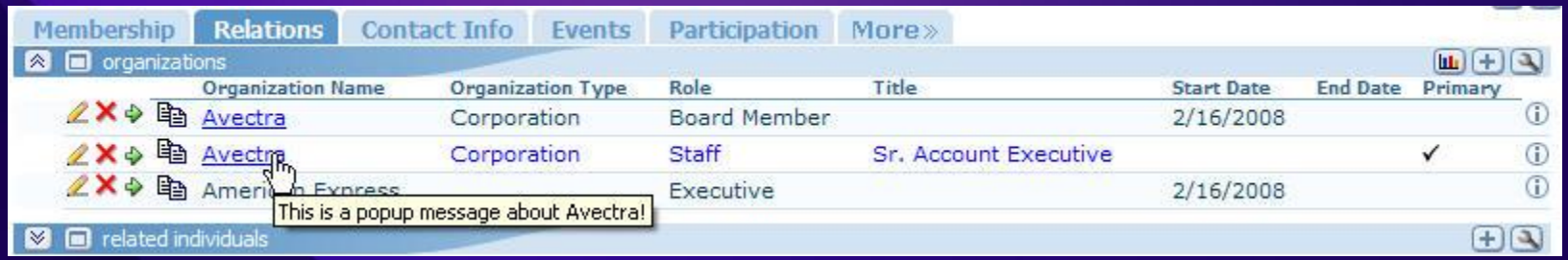
Result

- When user clicks “copy” link, add form pops up and **organization** is defaulted:



1 of 2: Mouseover in Child Form

- Add a “mouseover” link that embeds a HTML “title” tag that user can see upon mouseover



- Use this when you want to show more info on a child form but don’t have room

1 of 2: MouseOver setup

- UDF: `av_mouseover_preview_childform`
- First parameter is **popup** text
- Second parameter is **display** text

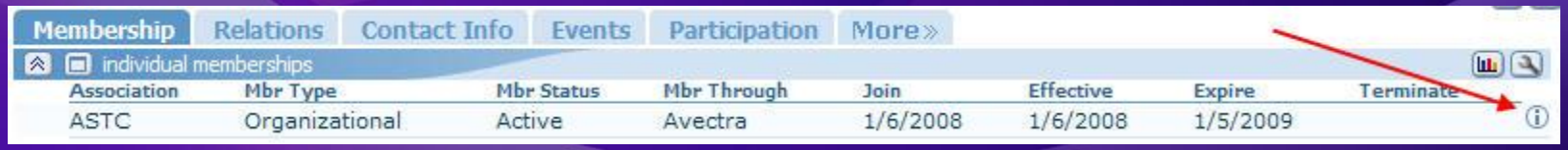
```
SELECT
org_cst_key,
ixo_key,
[ ] = ' <a href="javascript:OpenNewWindow(''../forms/DynamicEditModal.aspx?' +
                        'Action=Add' +
                        '&FormKey=eb7d8f2c-b258-444b-87d6-1aa2874d4da0' +
                        '&org_name=' + org_name +
                        '&ixo_org_cst_key=' + convert(char(36),ixo_org_cst_key) + ''')">' +
                        '<img border="0" height="16" width="16" alt="copy relationship"
src="../images/img_copy.gif"></a>',

[Organization Name]= [dbo].[av_mouseover_preview_childform] (
  convert(nvarchar(500), org_popup),
  case when cst_ixo_key=ixo_key then cst_org_name_dn else org_name end),

[Organization Type]=org_ogt_code,
```

2 of 2: Child Form Preview

- Preview forms are AJAX popup forms that show more info on a child form
- Powerful way to make child forms show more information, but only when user wants it
- Added in 2007.01 build

2 of 2: Child Form Preview in Action

- Hover mouse over “info” icon:



2 of 2: Child Form Preview - Setup

- Add a new Form for Preview Form and Design it
- Should be same Object as child form's destination form.
- In Child Form definition, enter the Preview Form and Key (if different)
- See wiki

Child Forms – The Vision

- Child Forms can return more than just viewable data
- Add images, hyperlinks, mouseovers, etc.
- Preview Form

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2 of 10 - Lookups

- Searching on **multiple criteria** with a lookup
- BONUS:
  - Type-ahead Suggest
  - Allow Clear

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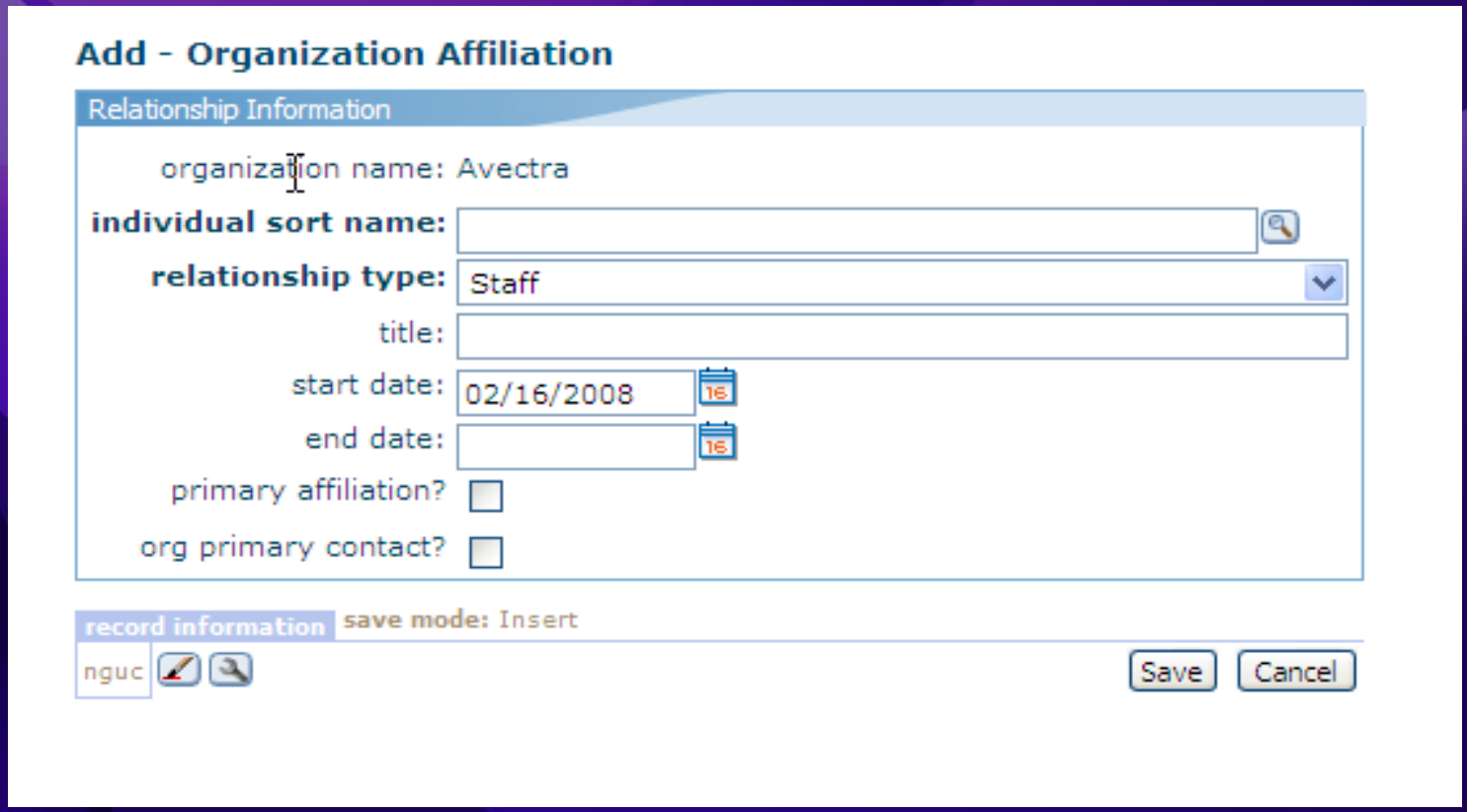
Requirement

- When relating an individual to an organization, users should be able to search for the individual to be related either by:
  - name (textbox)
    - and/or
  - customer id (textbox)
    - and/or
  - individual type (dropdownlist)

Solution

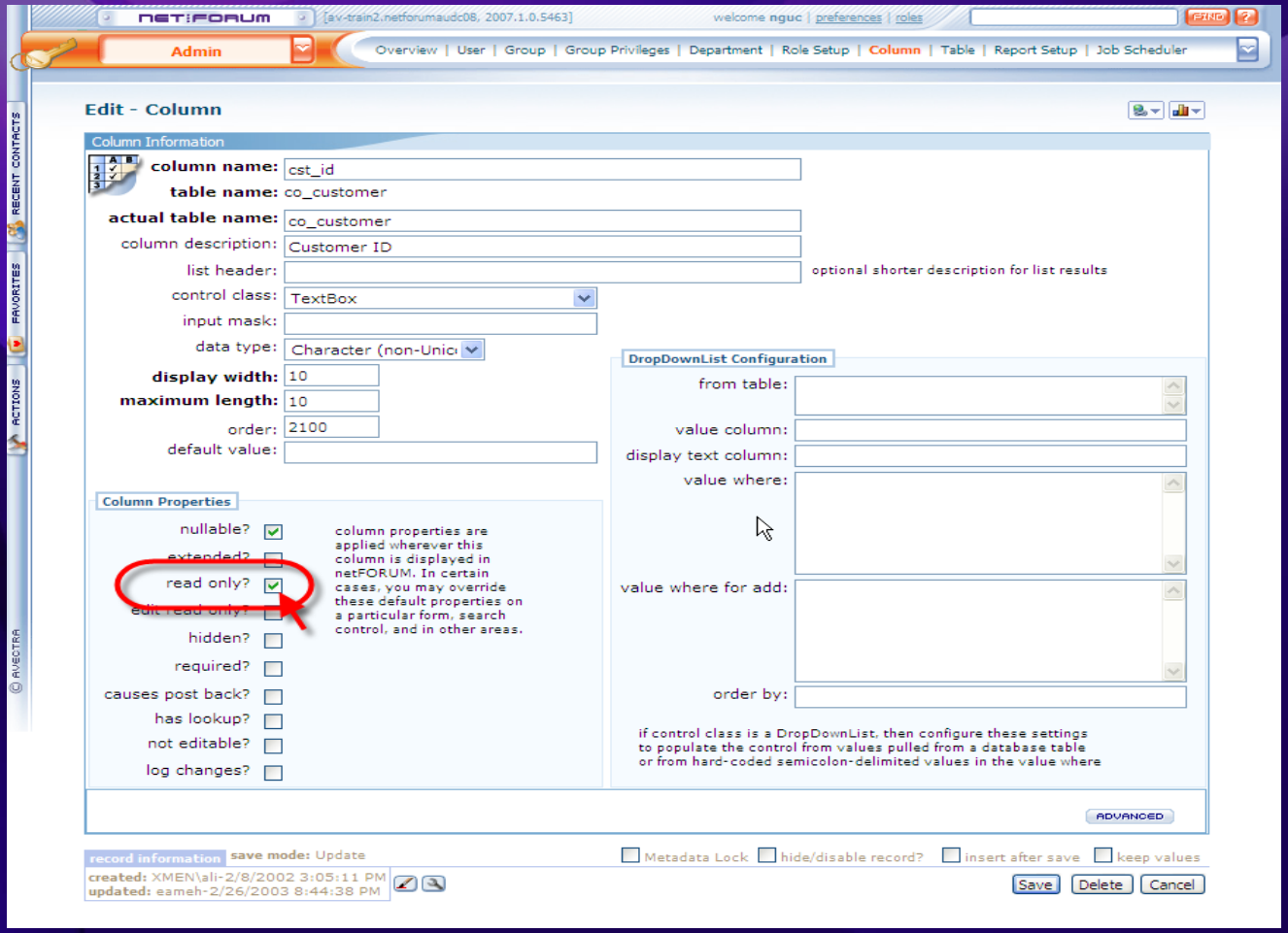
- On individual – Organization Relationship form:
  - Customer Id and Individual Type controls will be added to the form
  - Existing customer name lookup will be modified to pass customer id and individual type in lookup's "where expression"

Currently


Add - Organization Affiliation
Relationship Information
organization name: Avectra
individual sort name:
relationship type: Staff
title:
start date: 02/16/2008
end date:
primary affiliation?
org primary contact?
record information
save mode: Insert
nguc
Save
Cancel

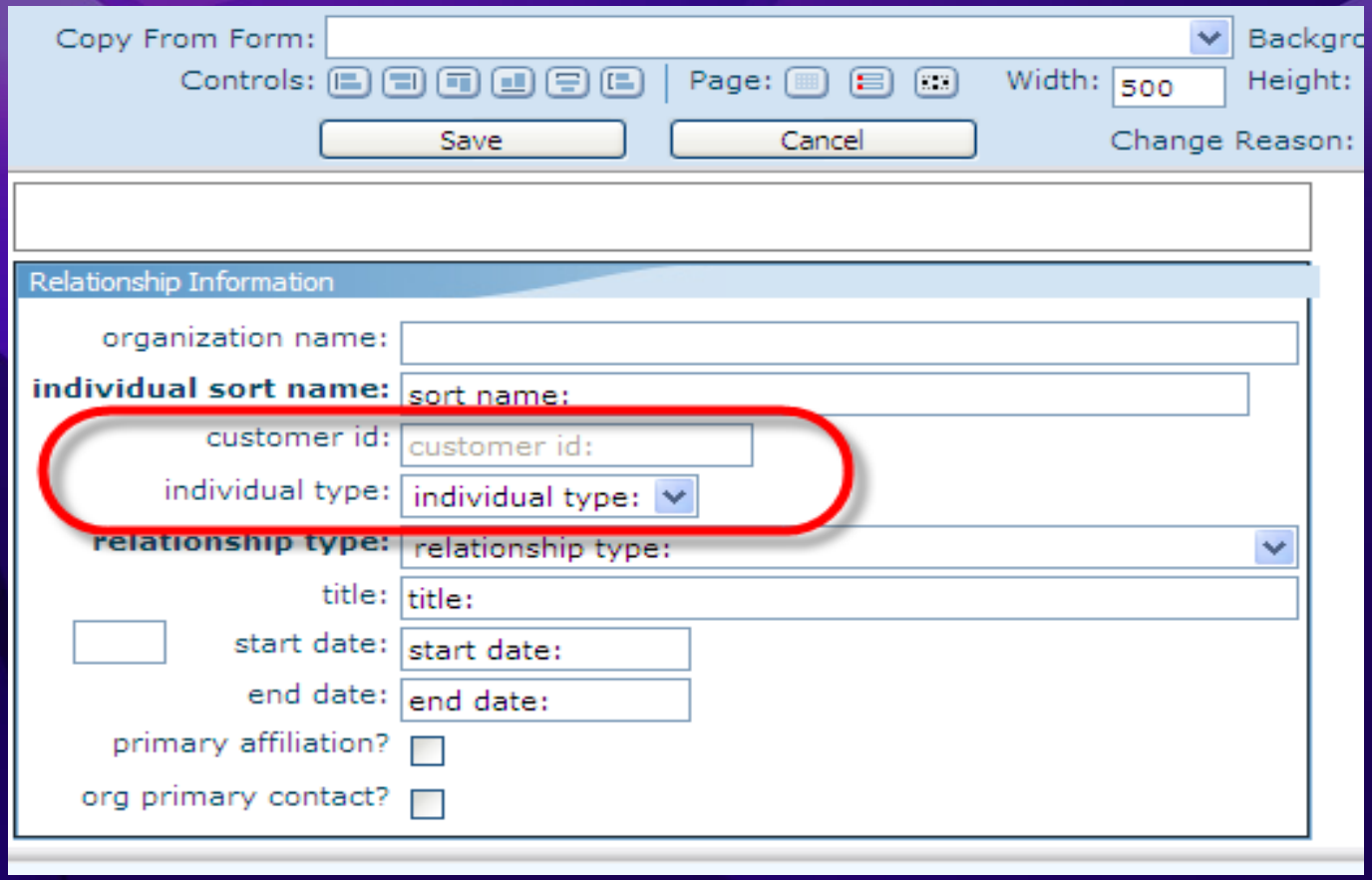
Column Definition

Make cst_id column NOT be read-only:



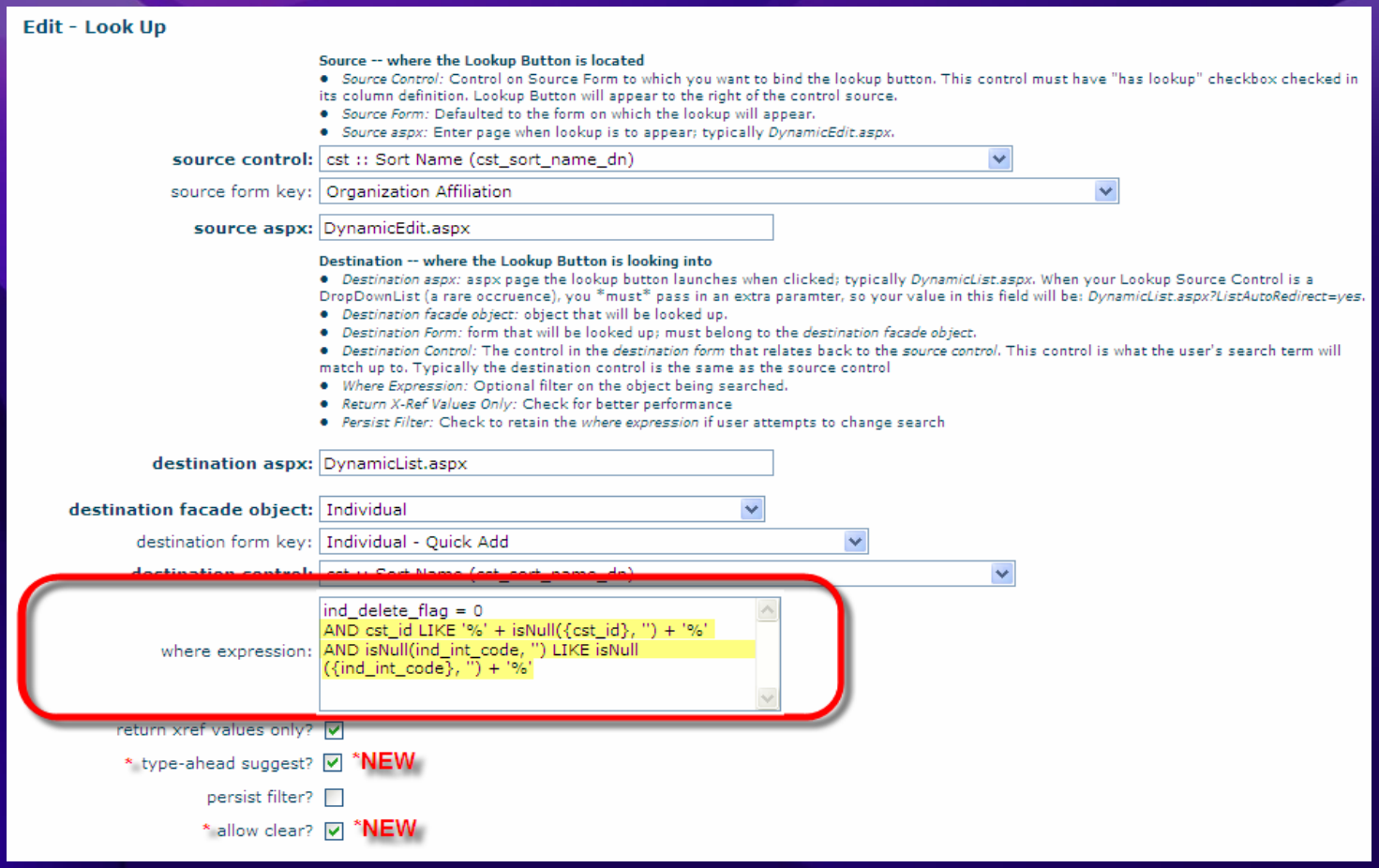
Form Designer

Add the two controls:

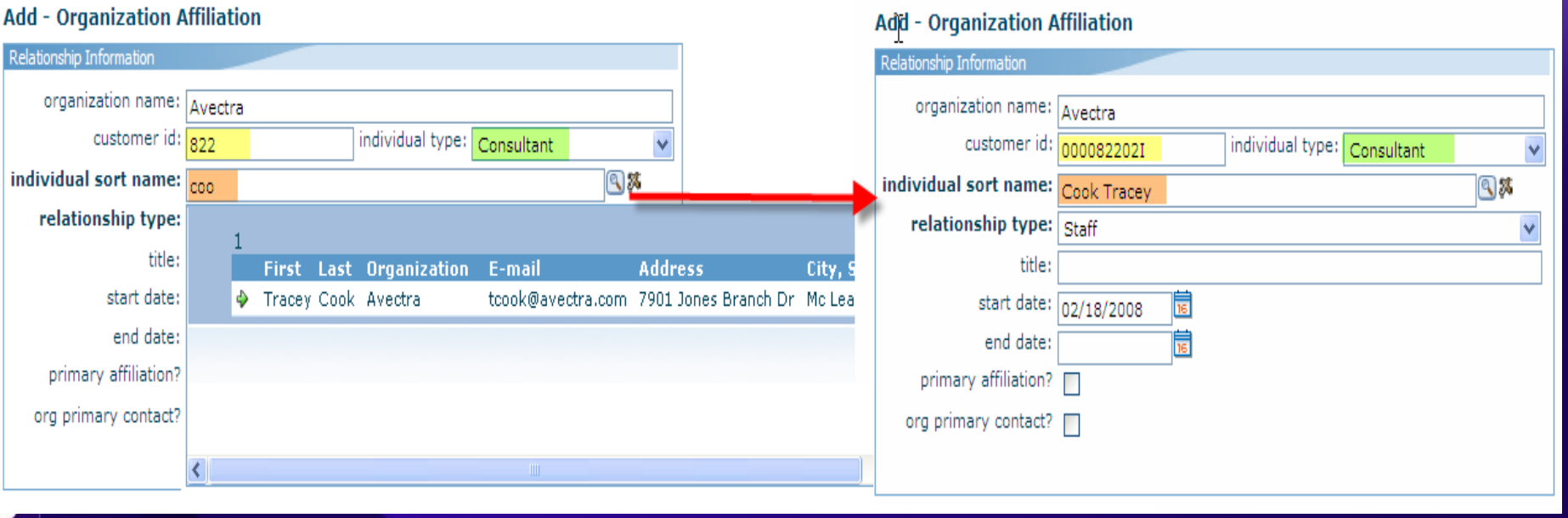


Lookup Definition

Modify the where expression:



Result


Add - Organization Affiliation
Relationship Information
organization name: Avectra
customer id: 822
individual type: Consultant
individual sort name: coo
relationship type:
title:
start date:
end date:
primary affiliation?
org primary contact?
1
First Last Organization E-mail Address City,
Tracey Cook Avectra tcook@avectra.com 7901 Jones Branch Dr Mc Lea
Add - Organization Affiliation
Relationship Information
organization name: Avectra
customer id: 0000822021
individual type: Consultant
individual sort name: Cook Tracey
relationship type: Staff
title:
start date: 02/18/2008
end date:
primary affiliation?
org primary contact?

3 of 10 - Dropdownlists

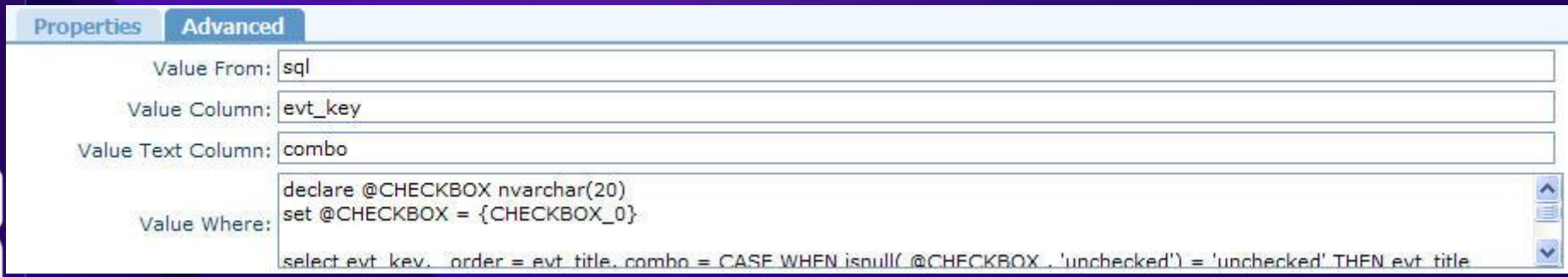
- **Changing values** displayed in a dropdownlist
- Dropdownlist **dependant** on other form **controls**

Requirement

- Ability to filter events dropdownlist to only display “National” events
- Add a checkbox that the dropdownlist is dependant on
- Make dropdownlist show all events if the checkbox is checked

Solution

- Design Form, add a Checkbox and Label
- Make Checkbox have “Auto Postback”
- Refine DropDownList definition:



DropDownList SQL

```
declare @CHECKBOX nvarchar(20)
set @CHECKBOX = {CHECKBOX_0}

/*
Parsed Value of {CHECKBOX_0}
Will be "on" if checked.
Will be NULL if unchecked.
*/

select
    evt_key,
    _order = evt_title,
    combo = CASE WHEN
        isnull( @CHECKBOX , 'unchecked') = 'unchecked' THEN evt_title
        ELSE evt_title + ' (' + isnull(etc_code, 'n/a') + ')'  END
from
    dbo.ev_event (nolock)
    left join dbo.ev_event_category (nolock)
        ON evt_etc_key = etc_key
where
    evt_delete_flag=0
    and (evt_start_date is null or evt_start_date+30>=getdate())
        and (evt_end_date is null or evt_end_date >=convert(datetime,convert(varchar(10),getdate(),101)) )
    and
        (
            -- if Unchecked, then only show National events
            (etc_code = 'National' and isnull( @CHECKBOX  , 'unchecked') = 'unchecked')
            OR
            -- if Checked, then show all events
            (isnull( @CHECKBOX  , 'checked') != 'checked')
        )
order by
    _order
```

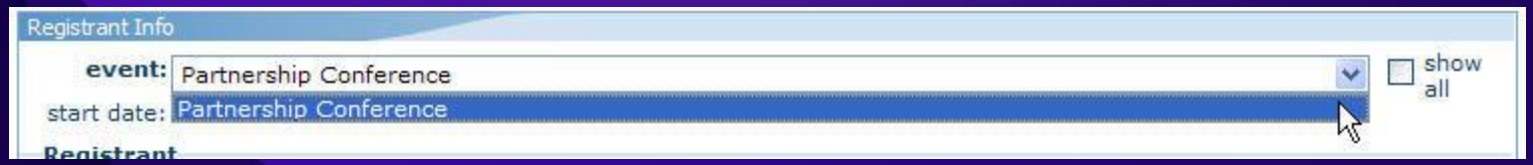
DropDownList SQL (text)

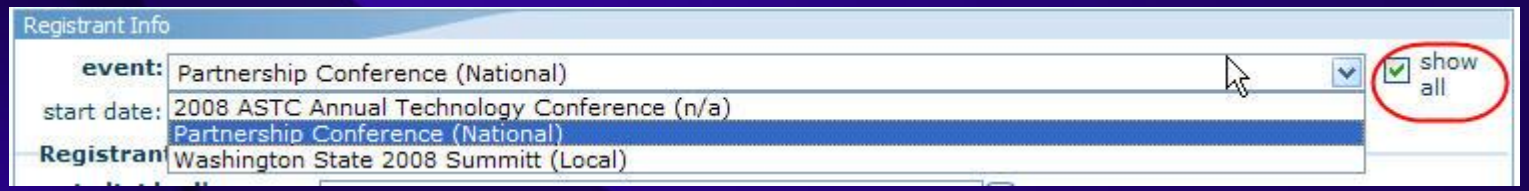
```
declare @CHECKBOX nvarchar(20)
set @CHECKBOX = {CHECKBOX_0}

select evt_key, _order = evt_title, combo = CASE WHEN isnull( @CHECKBOX ,
    'unchecked') = 'unchecked' THEN evt_title ELSE evt_title + ' (' +
    isnull(etc_code, 'n/a') + ')'  END
from dbo.ev_event (nolock) left join dbo.ev_event_category (nolock) ON
    evt_etc_key = etc_key
where
evt_delete_flag=0 and (evt_start_date is null or
    evt_start_date+30>=getdate()) and (evt_end_date is null or evt_end_date
    >=convert(datetime,convert(varchar(10),getdate(),101)) )
and  ((etc_code = 'National' and isnull( @CHECKBOX  , 'unchecked') =
    'unchecked') OR (isnull( @CHECKBOX  , 'checked') != 'checked') )
order by _order
```

Result

- Conditionally populate DropDownList values
- Compound DropDownList text





4 of 10 –ListControls

- Adding a control (**ListControl**) whose values are **populated with a SQL statement**

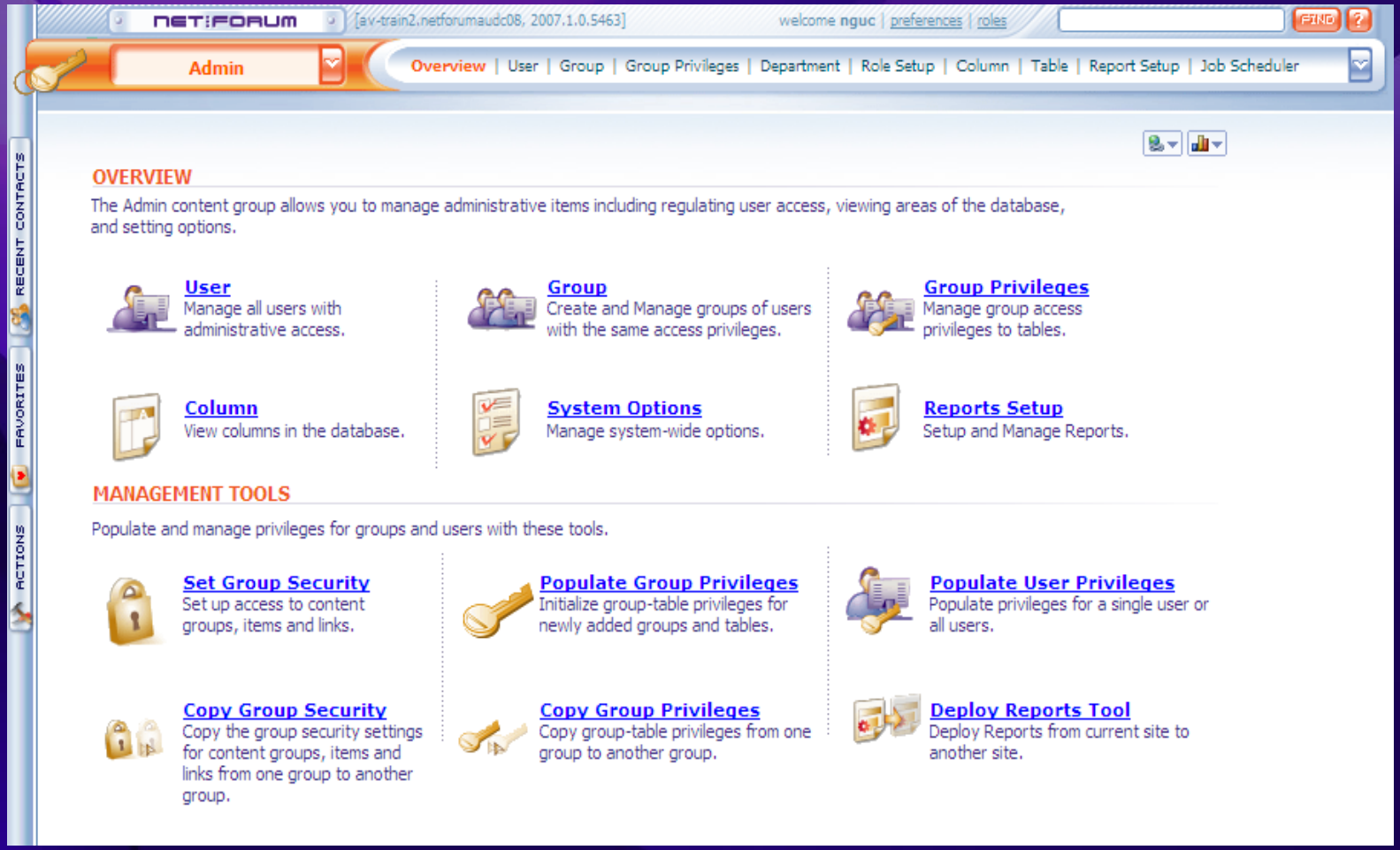
Requirement

- Ability to track custom deployments and punchlist issue fixes on a netFORUM site

Solution

- A new database table will be added
- Corresponding netFORUM form will be created
- A new control using ListControl.ascx will be added to a profile form to display the most recent deployments and to allow users to update this information

Currently


netFORUM
[av-train2.netforumaudc08, 2007.1.0.5463]
welcome nguc | preferences | roles
FIND
Admin
Overview | User | Group | Group Privileges | Department | Role Setup | Column | Table | Report Setup | Job Scheduler
RECENT CONTACTS
FAVORITES
ACTIONS
OVERVIEW
The Admin content group allows you to manage administrative items including regulating user access, viewing areas of the database, and setting options.
User
Manage all users with administrative access.
Group
Create and Manage groups of users with the same access privileges.
Group Privileges
Manage group access privileges to tables.
Column
View columns in the database.
System Options
Manage system-wide options.
Reports Setup
Setup and Manage Reports.
MANAGEMENT TOOLS
Populate and manage privileges for groups and users with these tools.
Set Group Security
Set up access to content groups, items and links.
Populate Group Privileges
Initialize group-table privileges for newly added groups and tables.
Populate User Privileges
Populate privileges for a single user or all users.
Copy Group Security
Copy the group security settings for content groups, items and links from one group to another group.
Copy Group Privileges
Copy group-table privileges from one group to another group.
Deploy Reports Tool
Deploy Reports from current site to another site.

On the Database

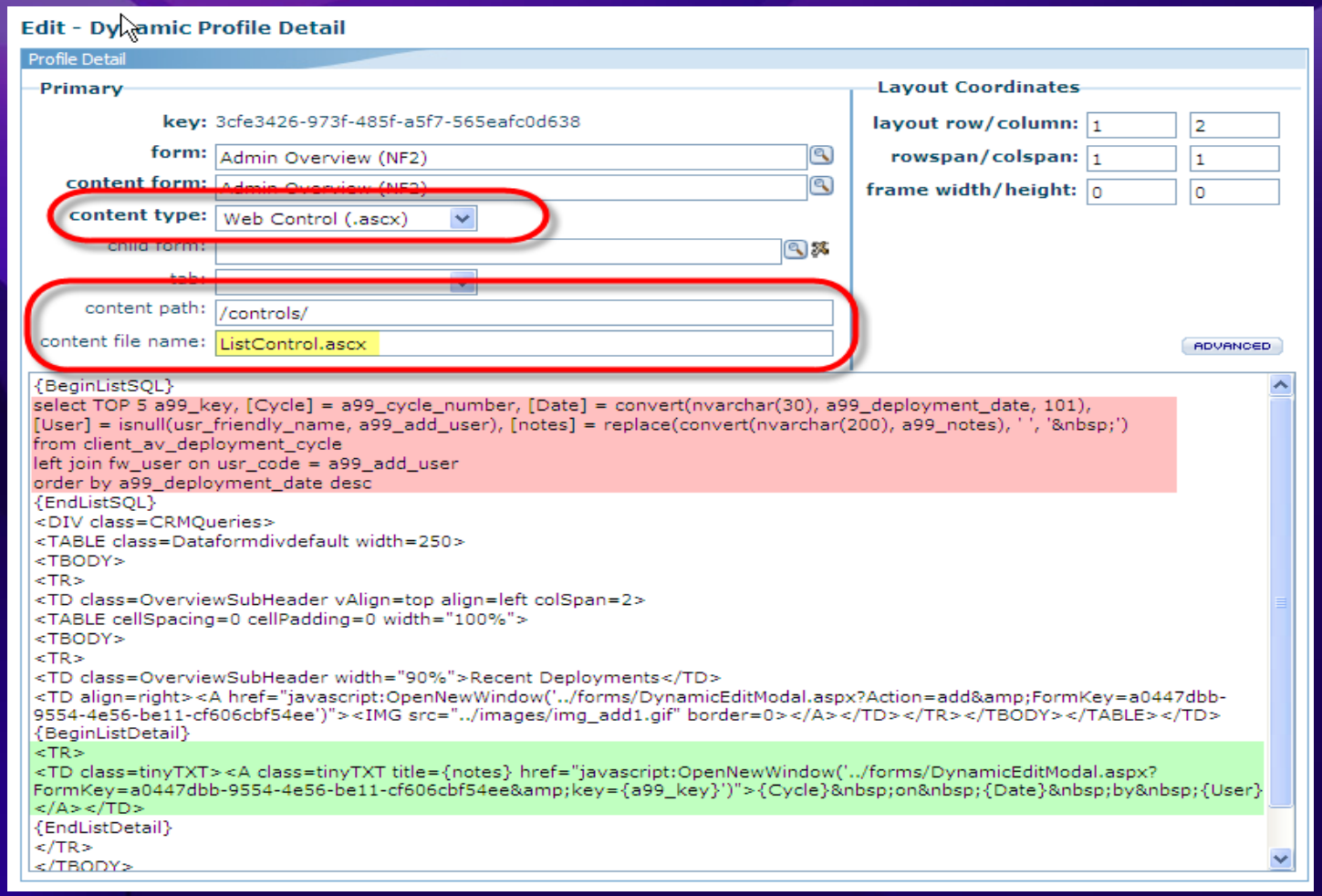
- Create table
- Refine table (add columns)
- Populate meta data

On the Toolkit

- Run Object Wizard
- Design Table
- Remove Content Item
- **Add Profile Detail (ListControl)**

On Profile Form

- Add a new Profile Detail:



ListControl

- SQL to pull data from the table:

```
{BeginListSQL}
select TOP 5
	a99_key, [Cycle] = a99_cycle_number,
	[Date] = convert(nvarchar(30), a99_deployment_date, 101),
	[User] = isnull(usr_friendly_name, a99_add_user),
	[notes] = replace(convert(nvarchar(200), a99_notes), ' ', ' ')
from
	client_av_deployment_cycle
	left join fw_user on usr_code = a99_add_user
order
	by a99_deployment_date desc
{EndListSQL}
```

ListControl

- HTML to display data in the recordset and provide hyperlink to Edit form:

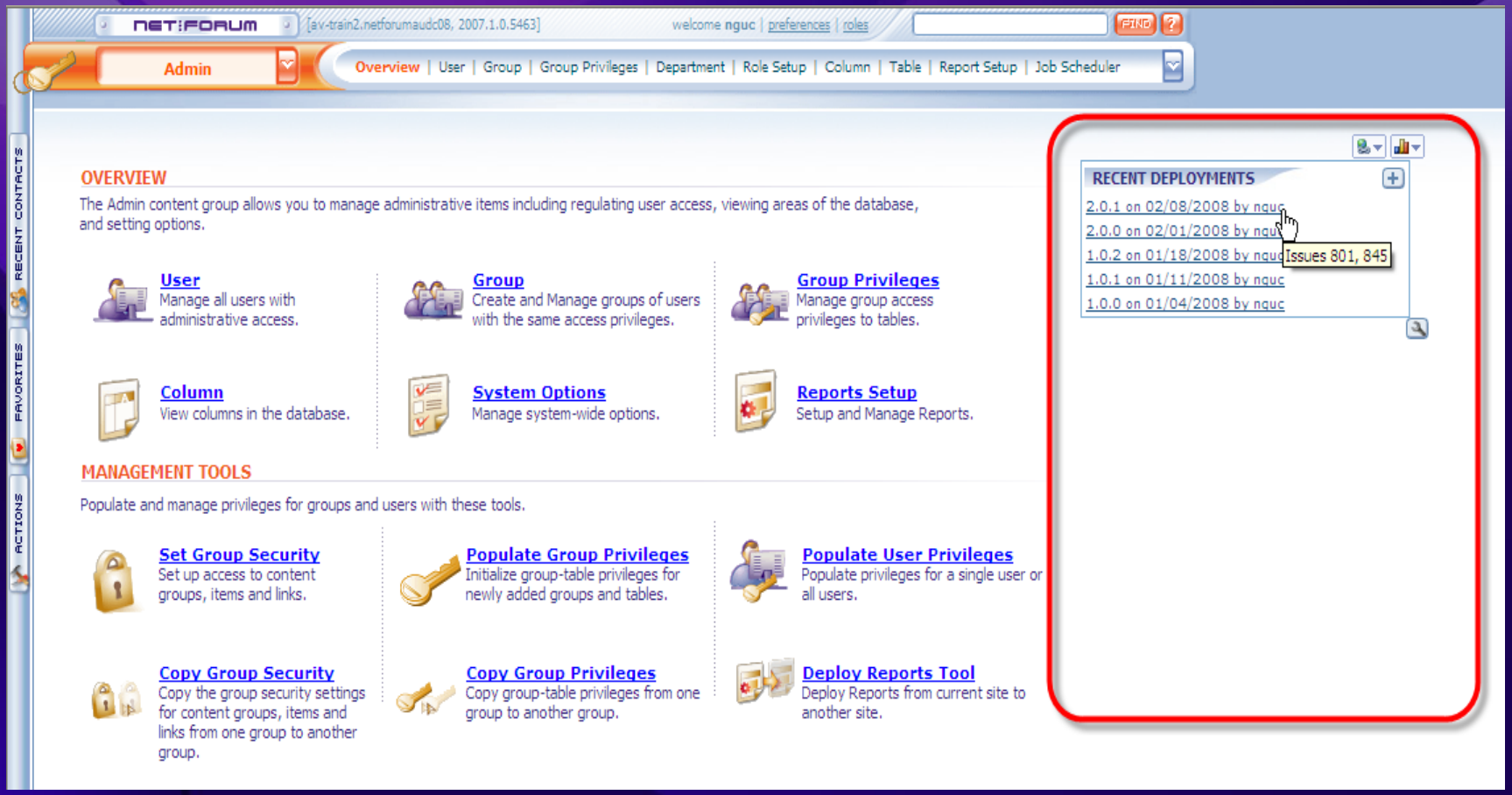
```
{BeginListDetail}
<TD class=tinyTXT>
    <A class=tinyTXT title={notes}
       href="javascript:OpenNewWindow('../forms/DynamicEditModal.aspx?
       FormKey=a0447dbb-9554-4e56-be11-
       cf606cbf54ee&amp;key={a99_key}')">
         {Cycle} on {Date} by {User}
    </A>
</TD>
{EndListDetail}
```

ListControl

- HTML to provide hyperlink to Add form:

```
<TD align=right>
    <A
    href="javascript:OpenNewWindow('../forms/DynamicEditModal.aspx?Acti
    on=add&amp;FormKey=a0447dbb-9554-4e56-be11-cf606cbf54ee')">
    <IMG src="../images/img_add1.gif" border=0>
    </A>
</TD>
```

Result


net:FORUM
[av-train2.netforumaudc08, 2007.1.0.5463]
welcome nguc | preferences | roles
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Admin
Overview | User | Group | Group Privileges | Department | Role Setup | Column | Table | Report Setup | Job Scheduler
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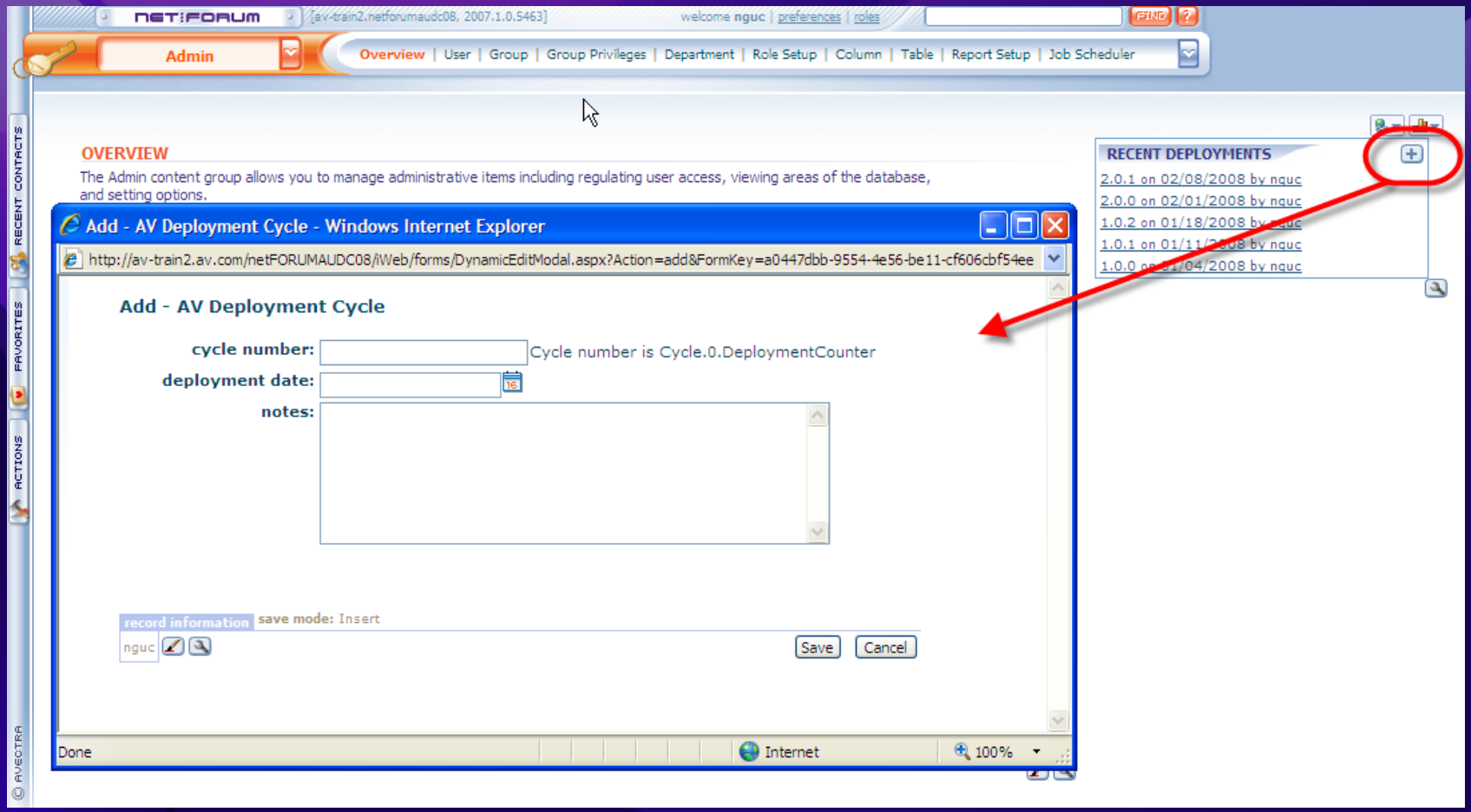
Populate Group Privileges
Initialize group-table privileges for newly added groups and tables.
Populate User Privileges
Populate privileges for a single user or all users.
Copy Group Security
Copy the group security settings for content groups, items and links from one group to another group.
Copy Group Privileges
Copy group-table privileges from one group to another group.
Deploy Reports Tool
Deploy Reports from current site to another site.
RECENT DEPLOYMENTS
2.0.1 on 02/08/2008 by nguc
2.0.0 on 02/01/2008 by ngu
1.0.2 on 01/18/2008 by nguc
Issues 801, 845
1.0.1 on 01/11/2008 by nguc
1.0.0 on 01/04/2008 by nguc

Result


netFORUM
[av-train2.netforumaudc08, 2007.1.0.5463]
welcome nguc | preferences | roles
FIND
Admin
Overview | User | Group | Group Privileges | Department | Role Setup | Column | Table | Report Setup | Job Scheduler
RECENT CONTACTS
FAVORITES
ACTIONS
OVERVIEW
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RECENT DEPLOYMENTS
2.0.1 on 02/08/2008 by nguc
2.0.0 on 02/01/2008 by nguc
1.0.2 on 01/18/2008 by nguc
1.0.1 on 01/11/2008 by nguc
1.0.0 on 01/04/2008 by nguc
Add - AV Deployment Cycle - Windows Internet Explorer
http://av-train2.av.com/netFORUMAUDC08/iWeb/forms/DynamicEditModal.aspx?Action=add&FormKey=a0447dbb-9554-4e56-be11-cf606cbf54ee
Add - AV Deployment Cycle
cycle number:
Cycle number is Cycle.0.DeploymentCounter
deployment date:
notes:
record information
save mode: Insert
nguc
Save
Cancel
Done
Internet
100%
© AVECTRA

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5 of 10 – RSS Feed

- Output an RSS feed on a CMS web page

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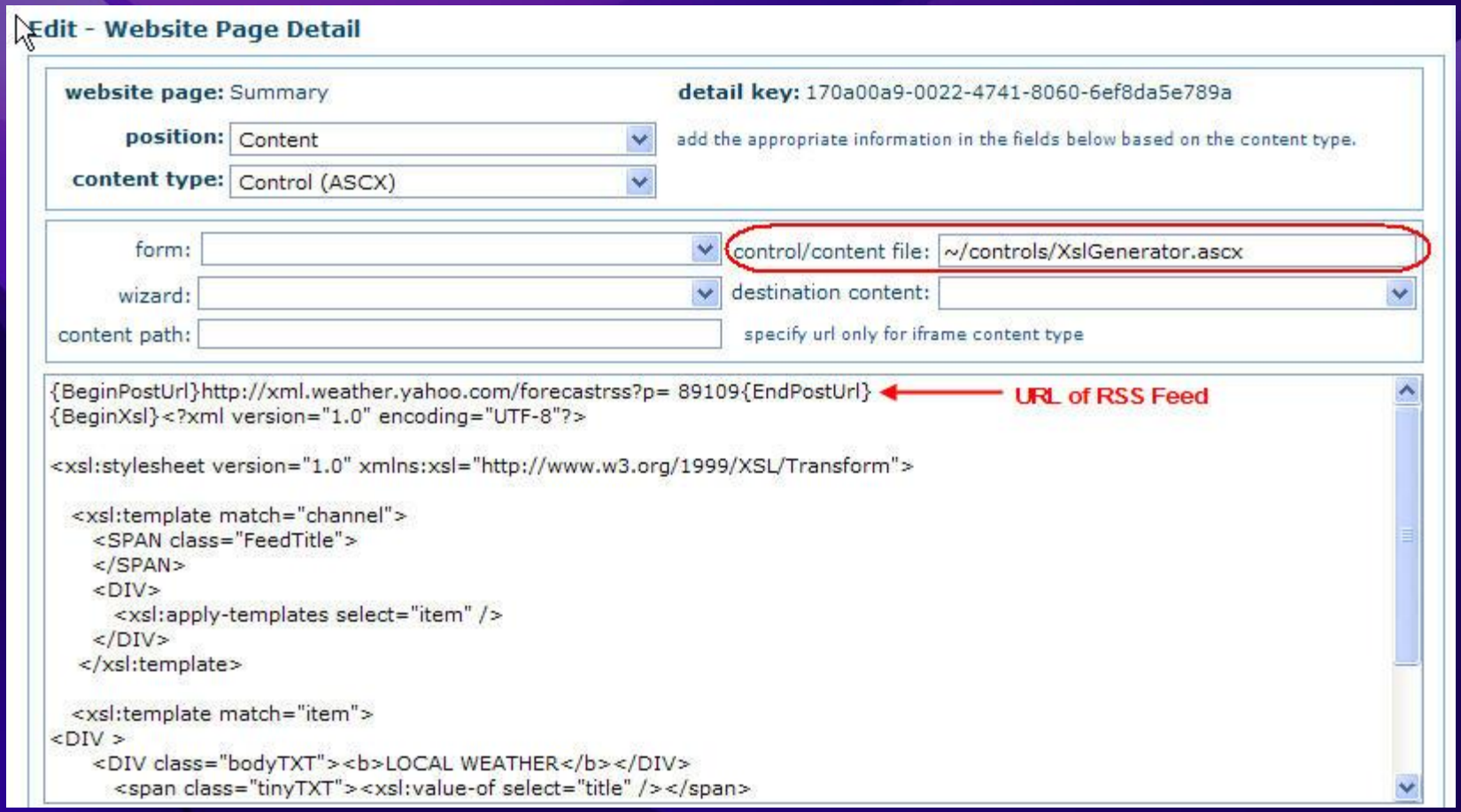
Requirement

- Ability to display the local weather on the website

Solution

- Add a new page detail using XslGenerator to pull weather data RSS feed

Add Website Page Detail



RSS Feed – Page Detail Content

- {BeginPostUrl}http://xml.weather.yahoo.com/forecastrss?p=89109{EndPostUrl}
- {BeginXsl}<?xml version="1.0" encoding="UTF-8"?>
- <xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
- <xsl:template match="channel">
- <SPAN class="FeedTitle">
- </SPAN>
- <DIV>
- <xsl:apply-templates select="item" />
- </DIV>
- </xsl:template>
- <xsl:template match="item">
- <DIV >
- <DIV class="bodyTXT">LOCAL WEATHER</DIV>
- <xsl:value-of select="title" />
- <DIV class="box01" style="padding:4px;width:260;"><xsl:value-of disable-output-escaping="yes" select="description" /></DIV>
- <p/>
- </DIV>
- </xsl:template>
- </xsl:stylesheet>
- {EndXsl}

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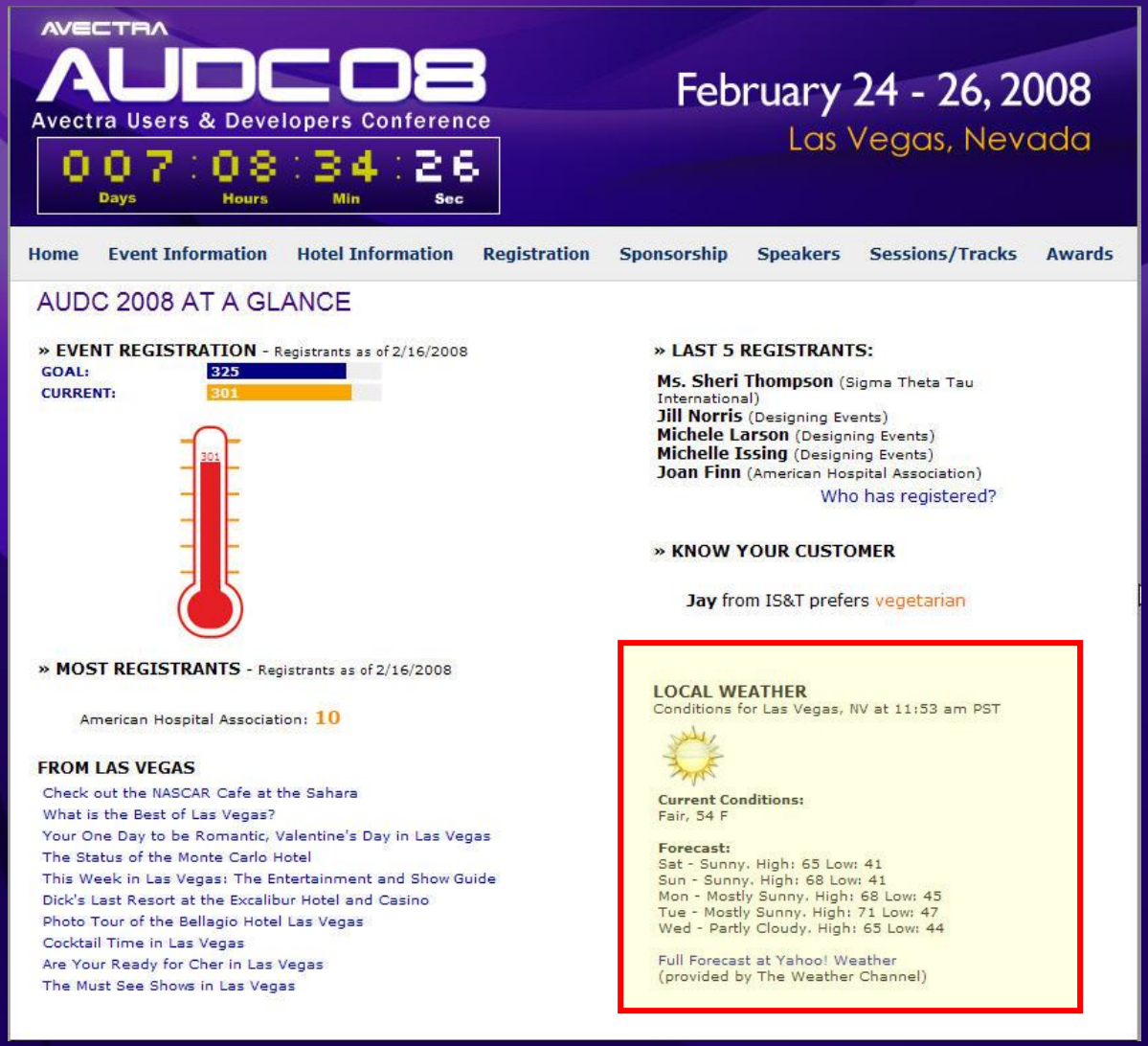
Result



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6 of 10 - JavaScript

- Utilizing JavaScript (instead of form extensions) to **set the value** of a control

Requirement

- When adding a new batch, the system should automatically default the Batch Name using values from other form controls. The Batch Name should be defaulted to:
  - Logged-in user's name
  - Batch date (date field, should be reformatted as yyyymmdd)
  - Business Unit (dropdownlist, its value is a GUID)
  - Period (dropdownlist, its value is a GUID)

Solution

- JavaScript will be used to default the Batch Name:
  - JavaScript will be added to each control that should set the batch name and linked to controls' event so the batch name is set as the controls are updated
  - **URL/Image Path/Data** field of the controls' will be used to add OnBlur JavaScript event

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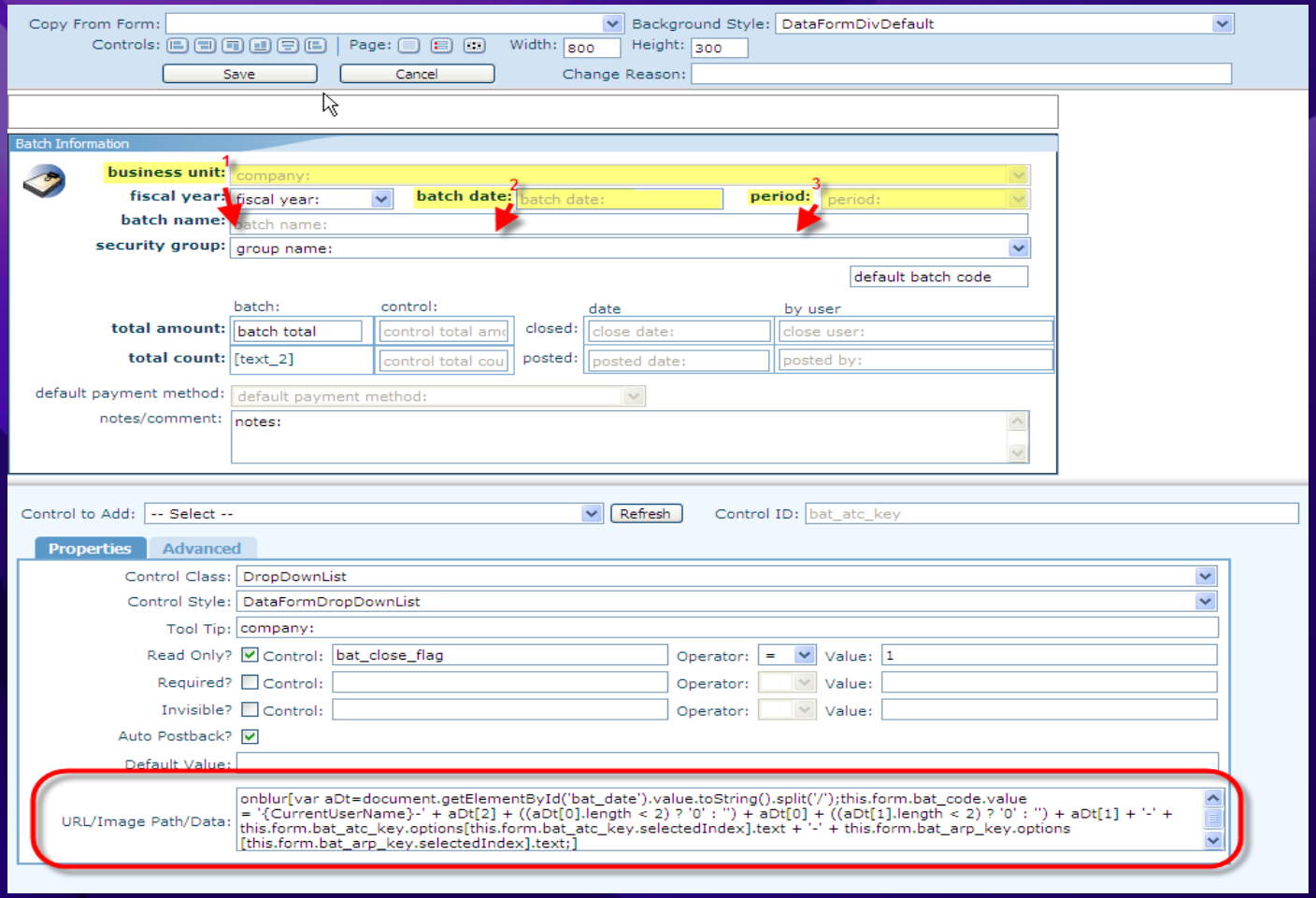
Form Designer



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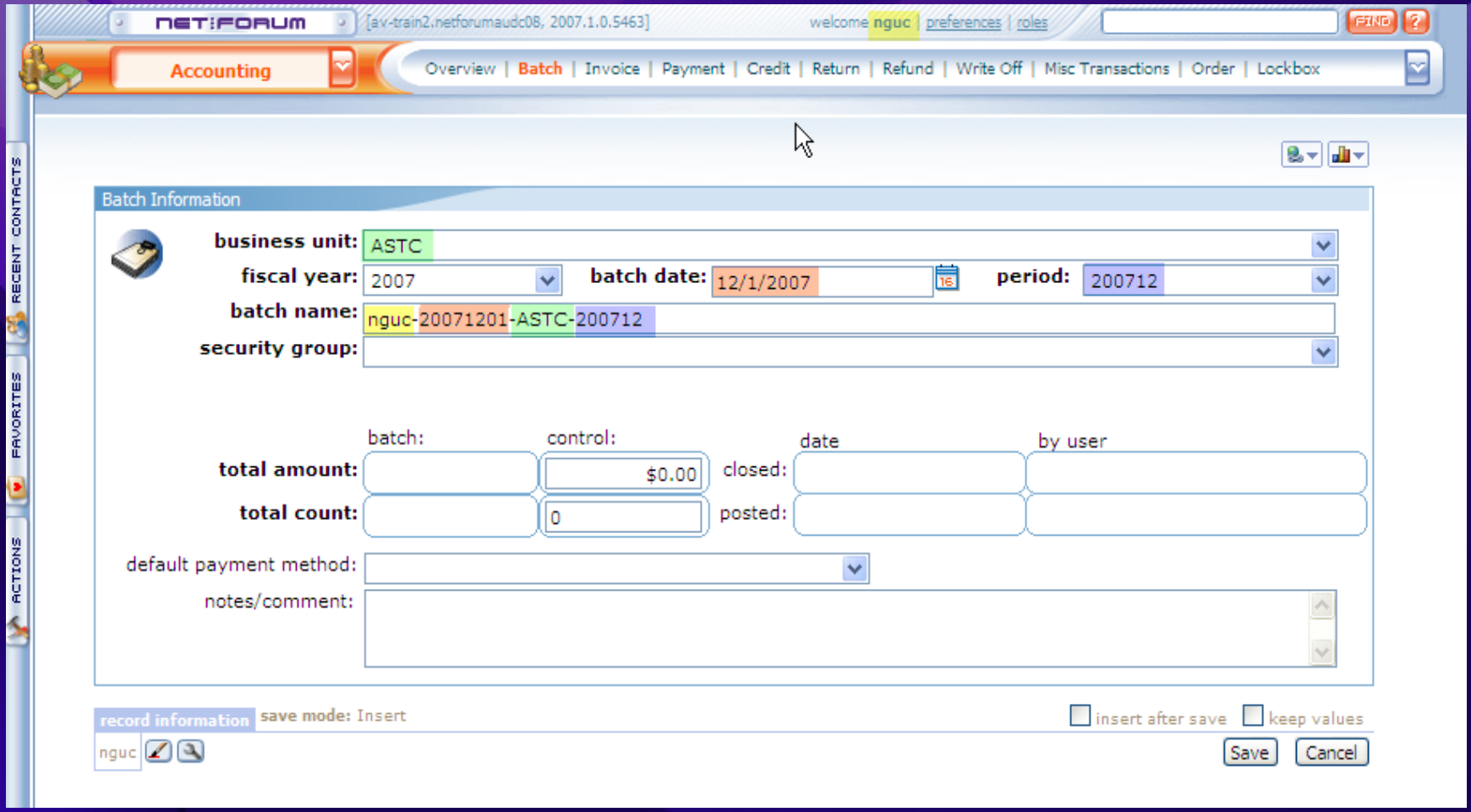
JavaScript

```
onblur[

var aDt = document.getElementById('bat_date').value.toString().split('/');

this.form.bat_code.value = '{CurrentUserName}-'
      + aDt[2]
      + ((aDt[0].length < 2) ? '0' : '') + aDt[0]
      + ((aDt[1].length < 2) ? '0' : '') + aDt[1] + '-'
      + this.form.bat_atc_key.options[this.form.bat_atc_key.selectedIndex].text+'-'
      + this.form.bat_arp_key.options[this.form.bat_arp_key.selectedIndex].text;
]
```

Result


net:FORUM
[av-train2.netforumaudc08, 2007.1.0.5463]
welcome nguc | preferences | roles
FIND
Accounting
Overview | Batch | Invoice | Payment | Credit | Return | Refund | Write Off | Misc Transactions | Order | Lockbox
RECENT CONTACTS
FAVORITES
ACTIONS
Batch Information
business unit: ASTC
fiscal year: 2007
batch date: 12/1/2007
period: 200712
batch name: nguc-20071201-ASTC-200712
security group:
batch:
control:
date
by user
total amount:
$0.00
closed:
total count:
0
posted:
default payment method:
notes/comment:
record information
save mode: Insert
insert after save
keep values
nguc
Save
Cancel

Alternative Solutions

- Form Extension on Initialize + Controls to cause AutoPostBack
- Others?

7 of 10 – XslGenerator

- Adding a control (**XslGenerator**) whose values are **populated with a SQL statement** or a **Web Service**

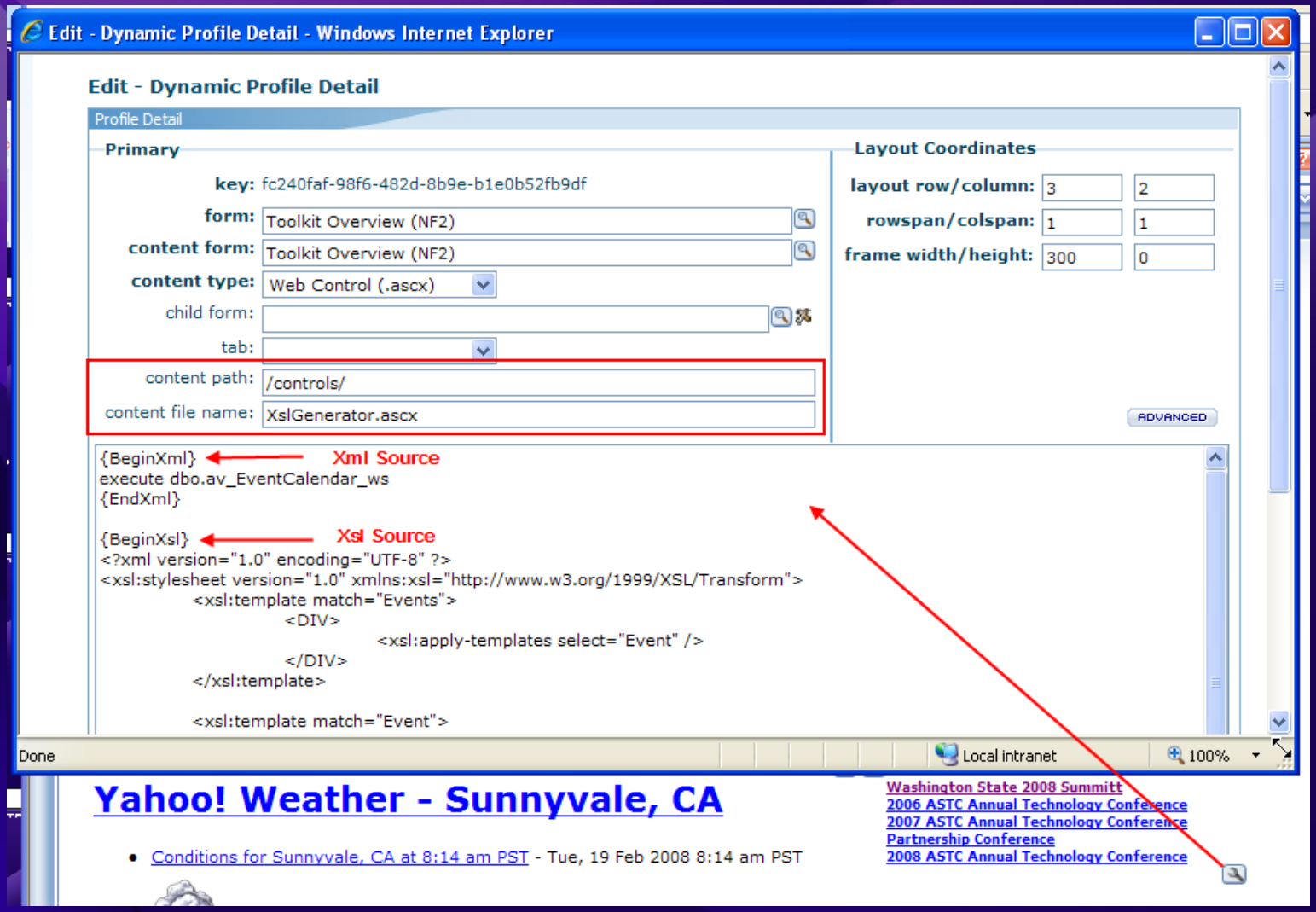
Requirement

- Ability to display recent events, individuals' organization and local weather

Solution

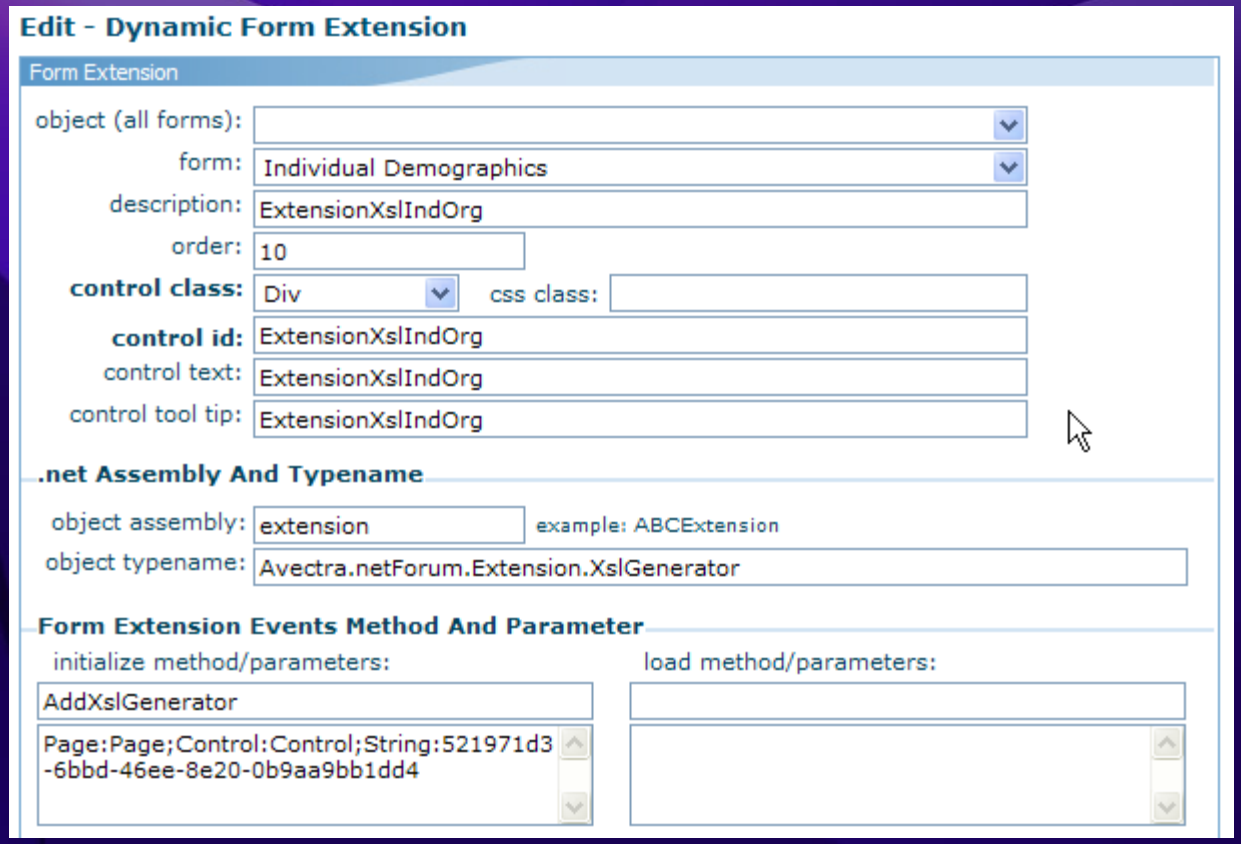
- Two new profile details using XslGenerator.ascx will be added to a profile form to display the recent events and the weather feed
- A new form extension using XslGenerator.ascx will be added to the individual demographics page to display individual's organizations

XslGenerator Setup

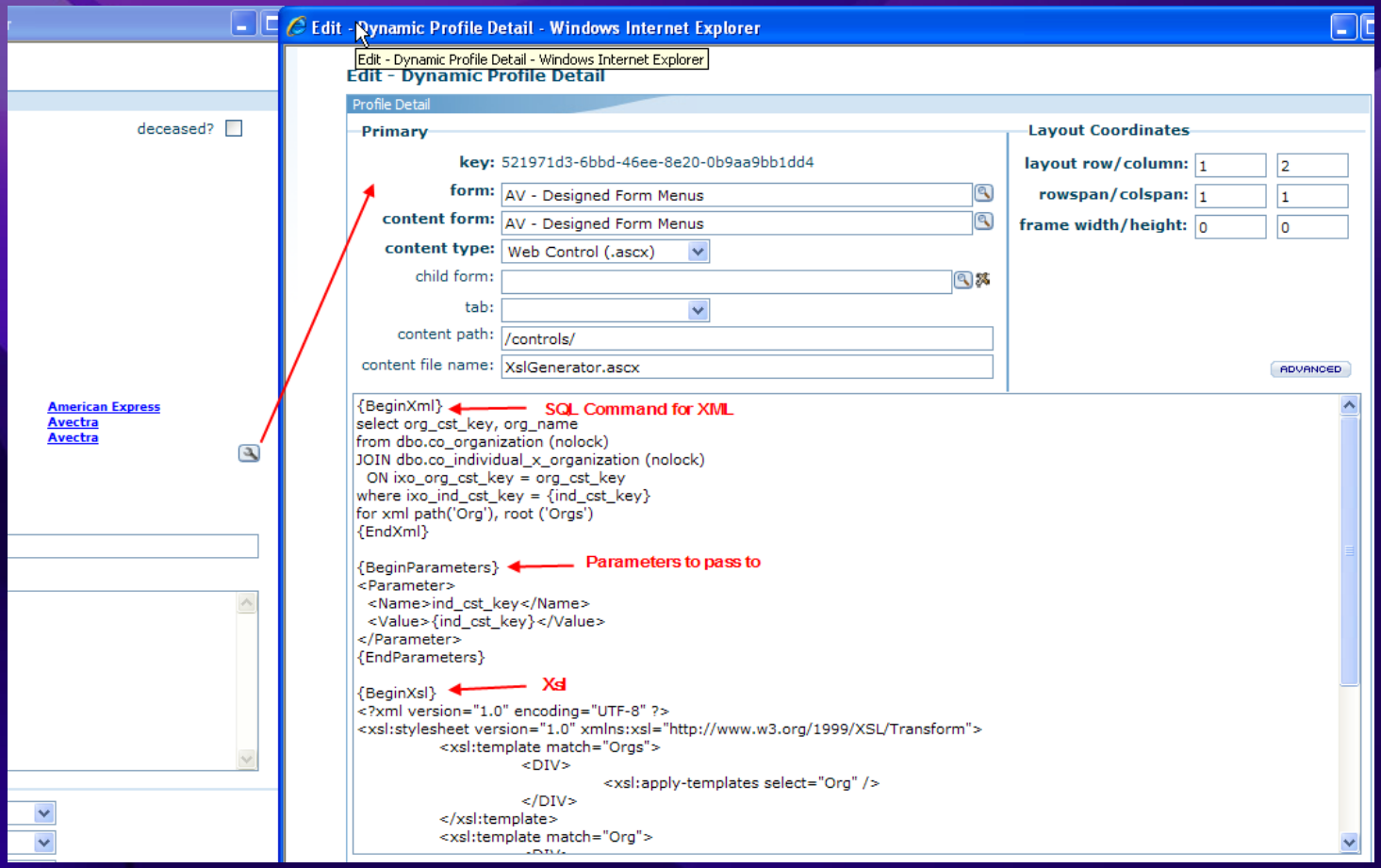


XslGenerator Form Extension

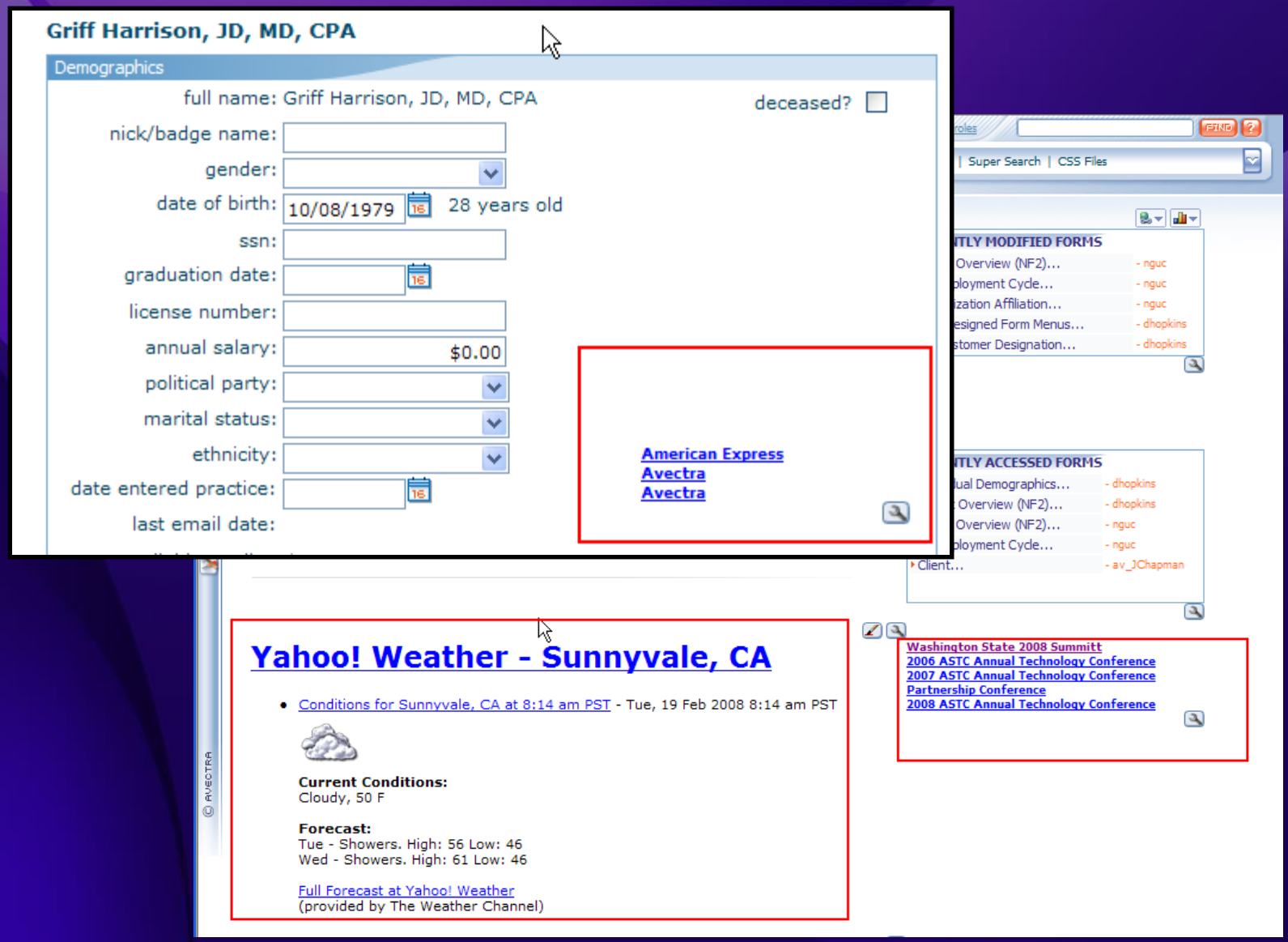
- Form Extension metadata
- Parameter points to Profile Detail



XslGenerator Form Extension



Result


Griff Harrison, JD, MD, CPA
Demographics
full name: Griff Harrison, JD, MD, CPA
deceased?
nick/badge name:
gender:
date of birth: 10/08/1979 28 years old
ssn:
graduation date:
license number:
annual salary: $0.00
political party:
marital status:
ethnicity:
date entered practice:
last email date:
American Express
Avectra
Avectra
Super Search | CSS Files
TLY MODIFIED FORMS
Overview (NF2)... - nguc
loyment Cycle... - nguc
zation Affiliation... - nguc
esigned Form Menus... - dhopkins
stomer Designation... - dhopkins
TLY ACCESSED FORMS
ual Demographics... - dhopkins
Overview (NF2)... - dhopkins
Overview (NF2)... - nguc
loyment Cycle... - nguc
Client... - av_JChapman
Yahoo! Weather - Sunnyvale, CA
Conditions for Sunnyvale, CA at 8:14 am PST - Tue, 19 Feb 2008 8:14 am PST
Current Conditions:
Cloudy, 50 F
Forecast:
Tue - Showers. High: 56 Low: 46
Wed - Showers. High: 61 Low: 46
Full Forecast at Yahoo! Weather
(provided by The Weather Channel)
Washington State 2008 Summit
2006 ASTC Annual Technology Conference
2007 ASTC Annual Technology Conference
Partnership Conference
2008 ASTC Annual Technology Conference

XslGenerator in iWeb

- Nearly identical to CMS XslGenerator
- Get XML data source from SQL or from Web Service
- Transform through Extensible Stylesheet Language (XSL)
- May use as Control on Profile/Overview, or as Form Extension on Form
- Available in 2007.01.02
- See wiki for more

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8 of 10 – Table Joins

- Adding an **existing table** as a table join
- Creating a **SQL View** and adding this as a table join

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Requirement

- Ability to query on individuals by:
  - invoice number
  - batch that they have an invoice in

Solution

- A new SQL View will be created (that pulls individuals, their invoices, and batches that the invoices are in)
- SQL View will be added to md_table
- A new table join will be created between co_individual and the SQL view

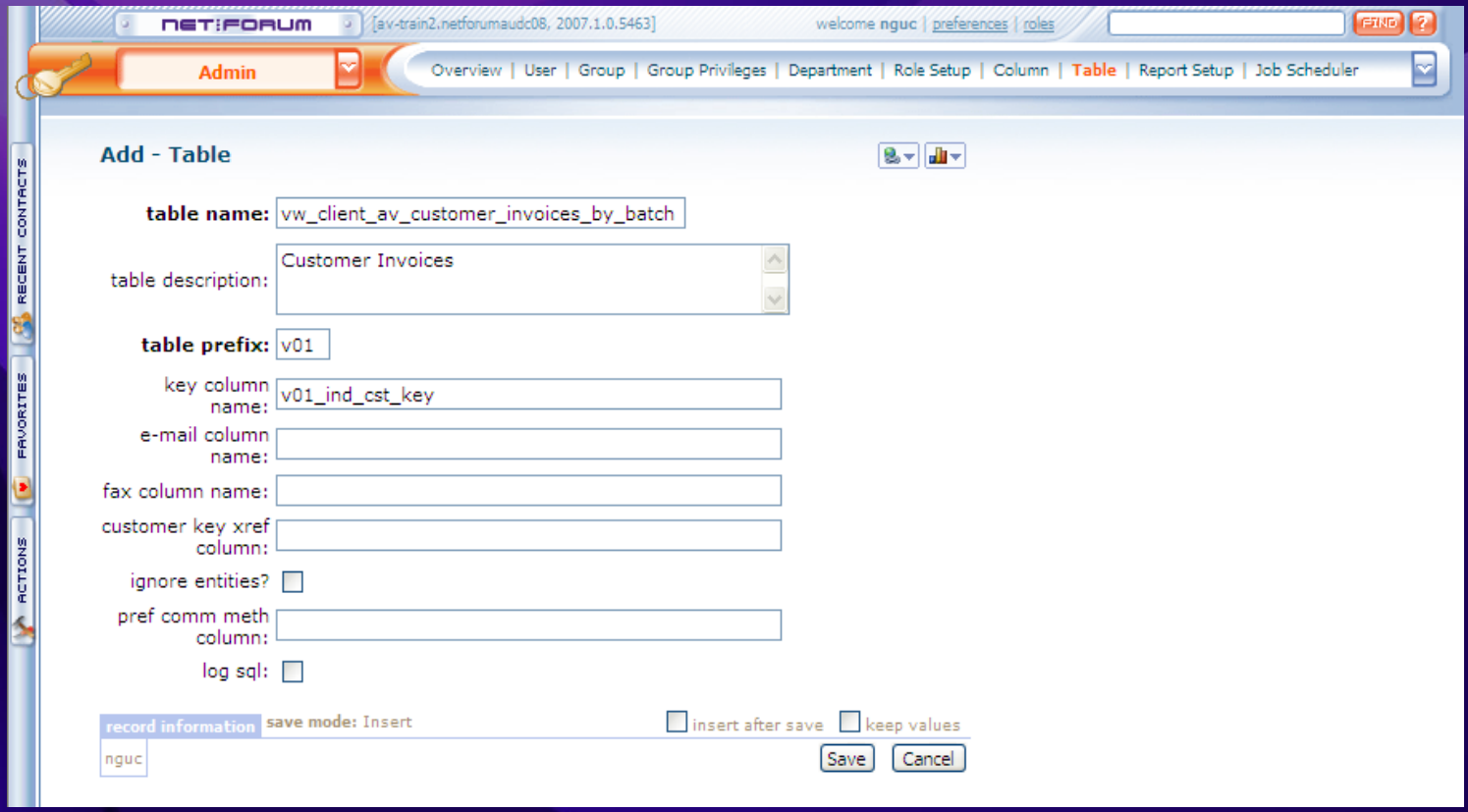
Create SQL View

- Create SQL View
- Grant SELECT Permissions

```
CREATE VIEW [dbo].[vw_client_av_customer_invoices_by_batch]
AS
SELECT
    inv_cst_key as v01_ind_cst_key,
    inv_key as v01_inv_key,
    bat_code as v01_bat_code
FROM
    ac_invoice (nolock)
    join ac_batch (nolock)
        on inv_bat_key=bat_key
    join co_customer (nolock)
        on inv_cst_key = cst_key
WHERE
    exists(select * from ac_invoice_detail (nolock) where ivd_inv_key=inv_key and ivd_void_flag=0 and ivd_delete_flag=0 and ivd_ajd_key is null)
    AND bat_close_flag = 0
go

GRANT SELECT ON [dbo].[vw_client_av_customer_invoices_by_batch] TO netForumUser,netForumAdmin,AvectraAdmin, netForumReport
go
```

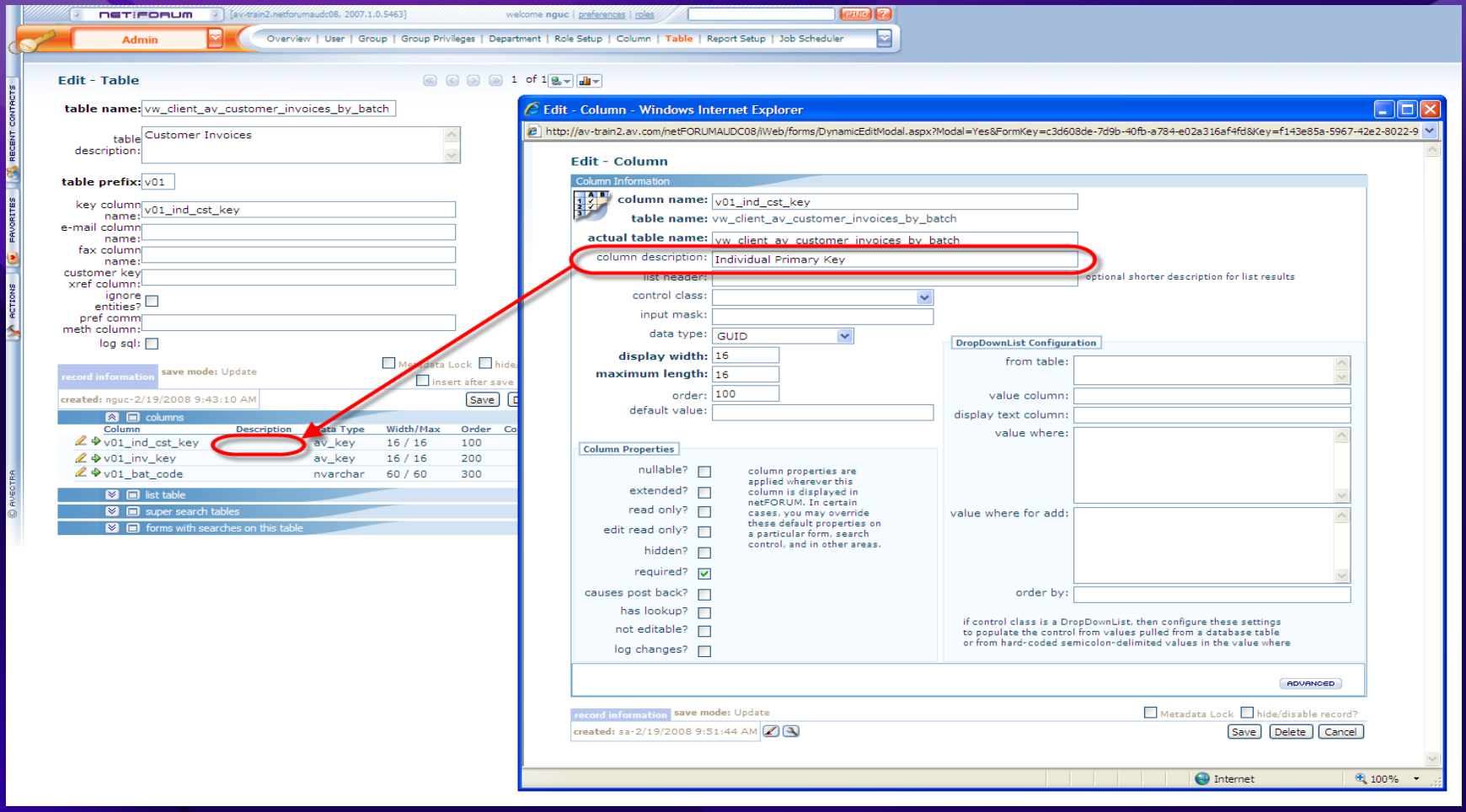
Add View to md_table



Populate meta data

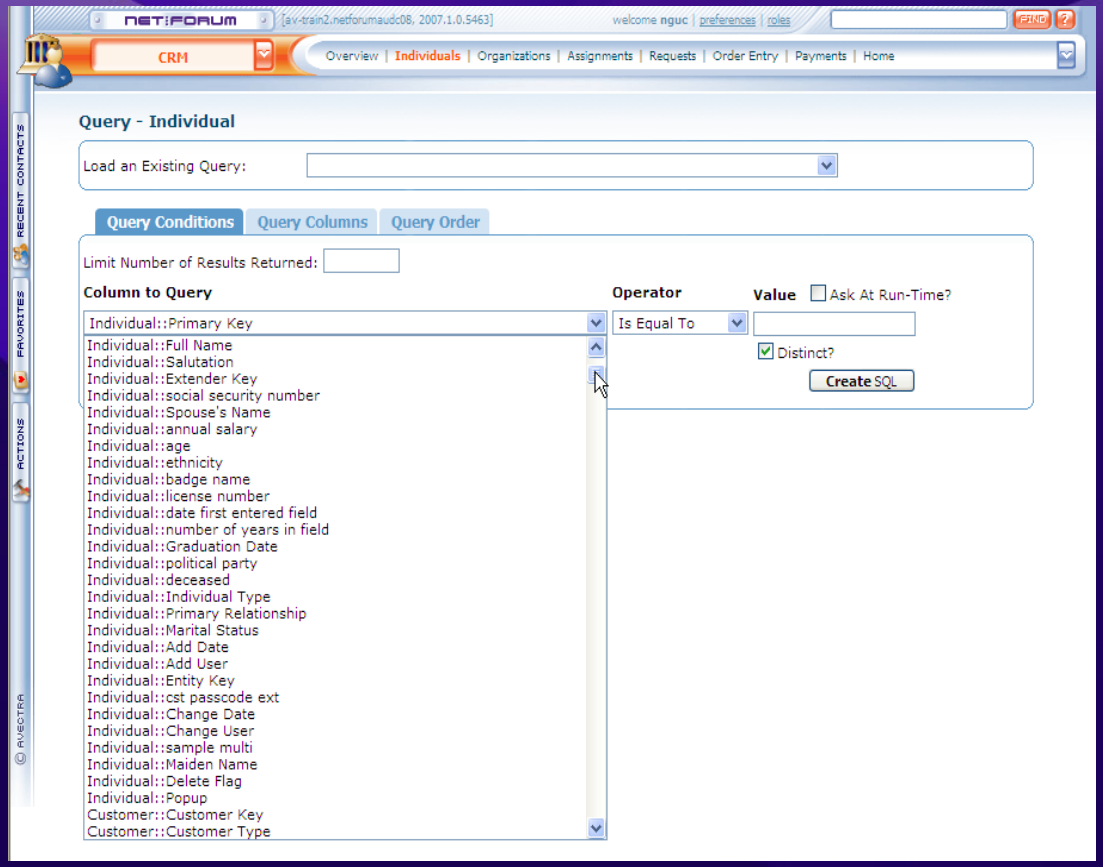
```
exec dbo.md_column_populate
go
exec dbo.fw_group_table_column_privilege_populate
go
exec dbo.md_privilege_populate_by_table_quick 'vw_client_av_customer_invoices_by_batch'
go
```

Populate Column Descriptions in md_column

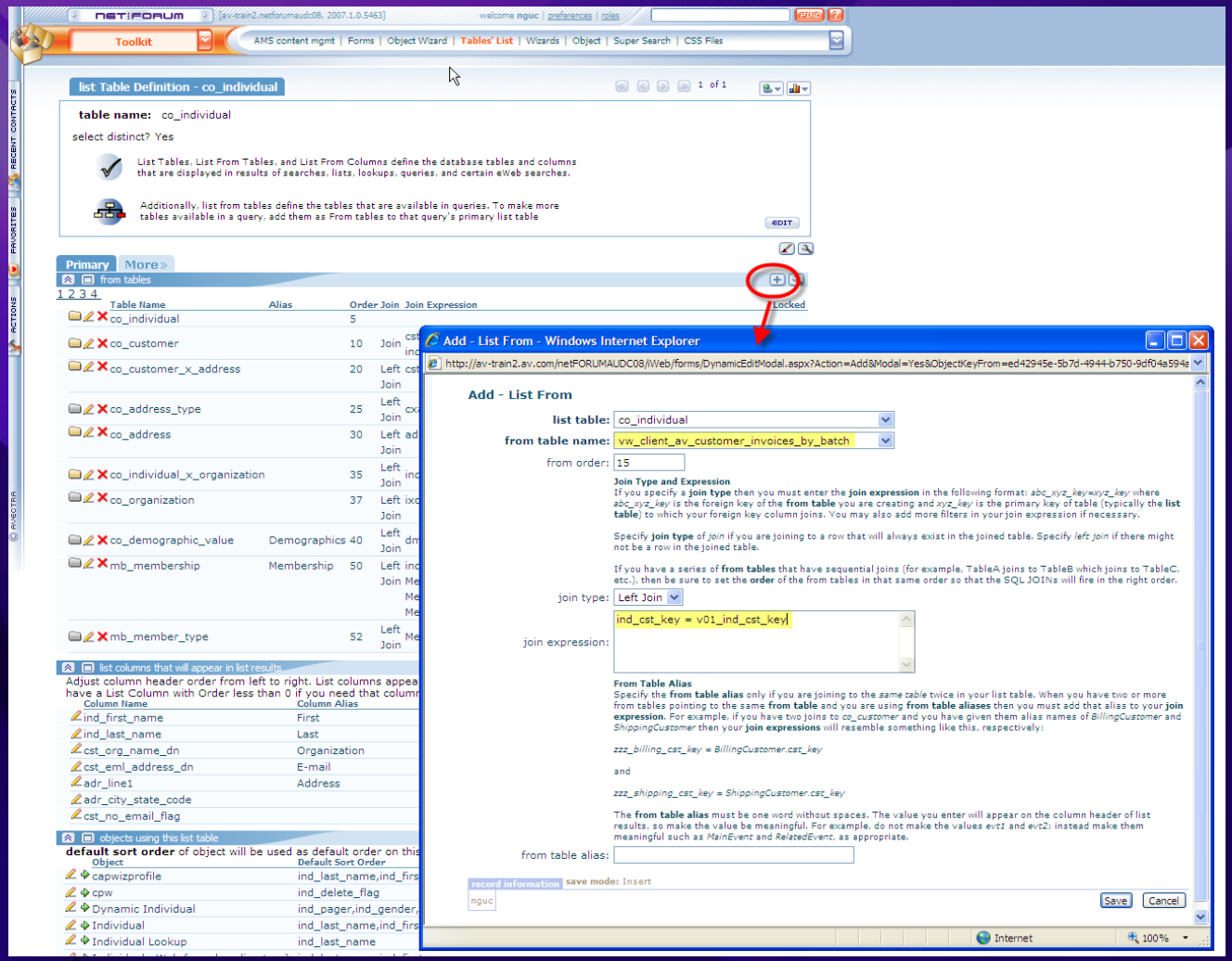


Currently

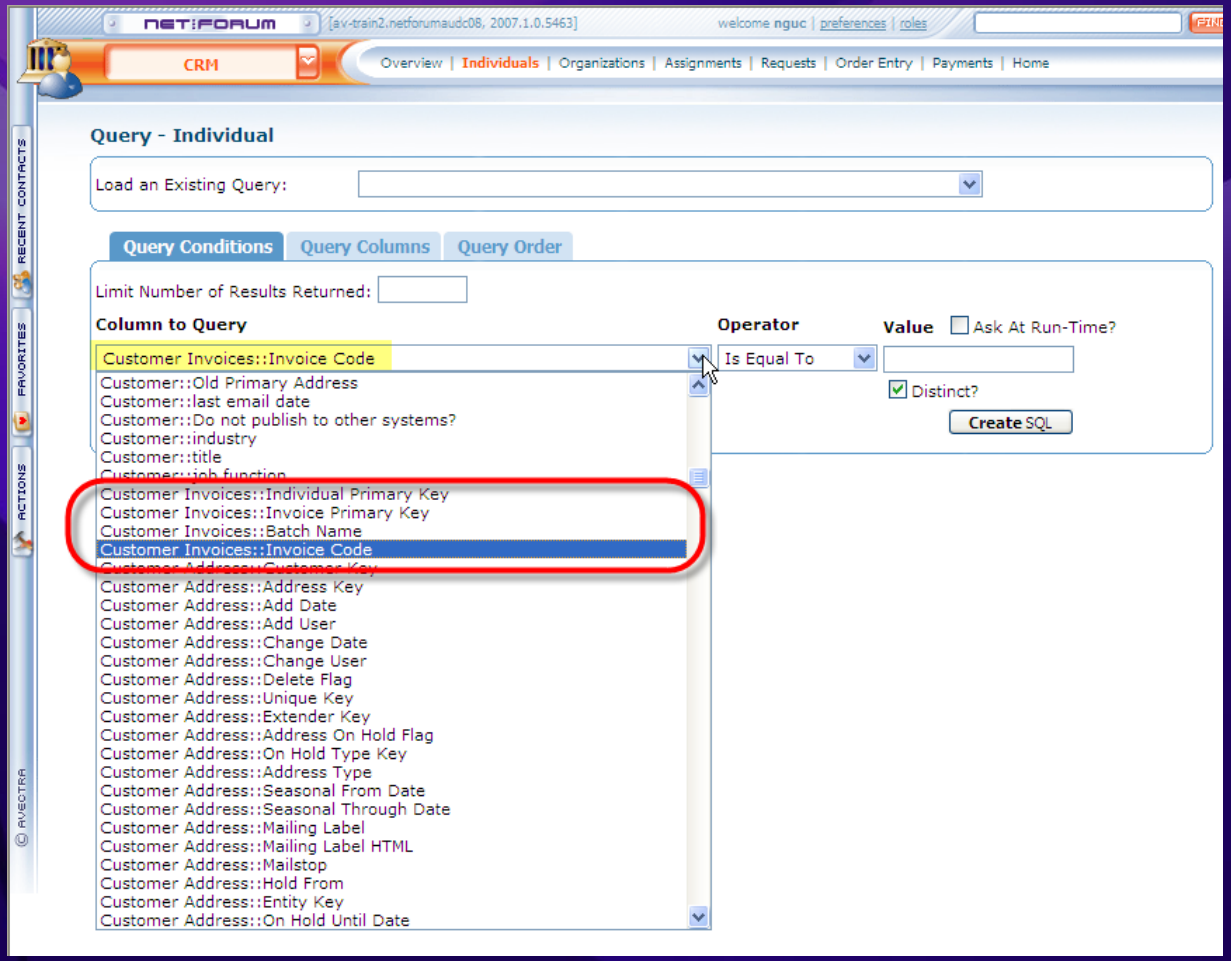
- Cannot query individuals on invoice code, or batch:



Add Table Join



Result


netFORUM
[av-train2.netforumaudc08, 2007.1.0.5463]
welcome nguc | preferences | roles
CRM
Overview | Individuals | Organizations | Assignments | Requests | Order Entry | Payments | Home
Query - Individual
Load an Existing Query:
Query Conditions
Query Columns
Query Order
Limit Number of Results Returned:
Column to Query
Operator
Value
Ask At Run-Time?
Customer Invoices::Invoice Code
Is Equal To
Distinct?
Create SQL
Customer::Old Primary Address
Customer::last email date
Customer::Do not publish to other systems?
Customer::industry
Customer::title
Customer Invoices::Individual Primary Key
Customer Invoices::Invoice Primary Key
Customer Invoices::Batch Name
Customer Invoices::Invoice Code
Customer Address::Address Key
Customer Address::Add Date
Customer Address::Add User
Customer Address::Change Date
Customer Address::Change User
Customer Address::Delete Flag
Customer Address::Unique Key
Customer Address::Extender Key
Customer Address::Address On Hold Flag
Customer Address::On Hold Type Key
Customer Address::Address Type
Customer Address::Seasonal From Date
Customer Address::Seasonal Through Date
Customer Address::Mailing Label
Customer Address::Mailing Label HTML
Customer Address::Mailstop
Customer Address::Hold From
Customer Address::Entity Key
Customer Address::On Hold Until Date
RECENT CONTACTS
FAVORITES
ACTIONS
© AVECTRA

9 of 10 – Designed Form Menus

- Adding a popup page to display additional information on a profile page

Requirement

- Ability to see detailed information about an individual upon mouseover/click on “custom info” link

Solution

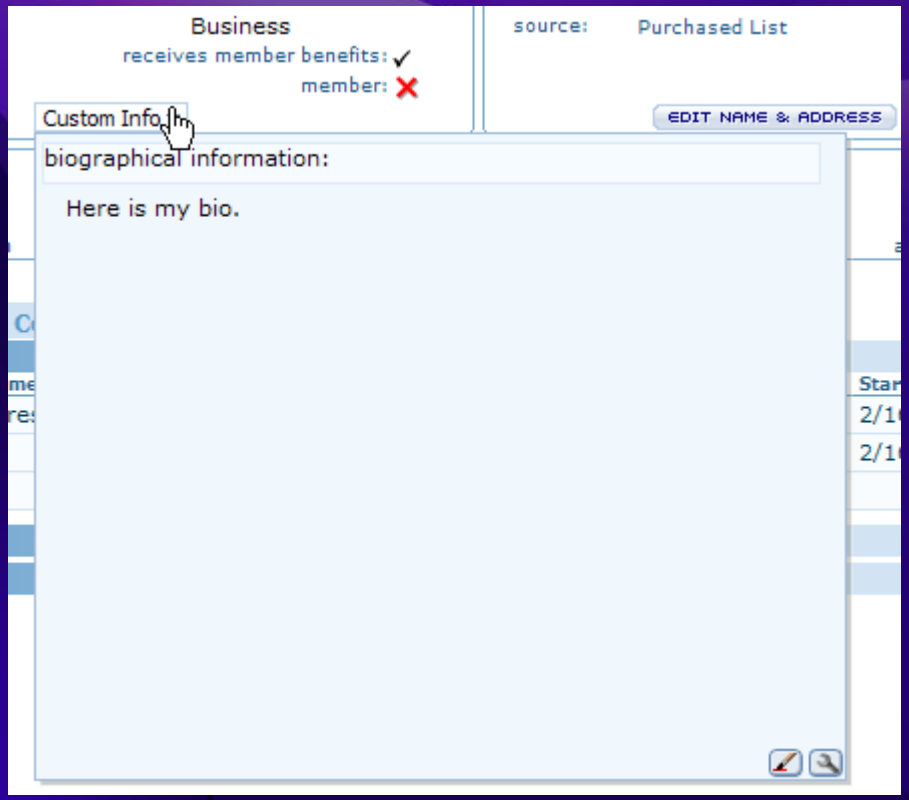
- Design a Form for use as popup form
- Design the Form from which you want the popup to launch popup
- Add “hyperlink” control with special tags:

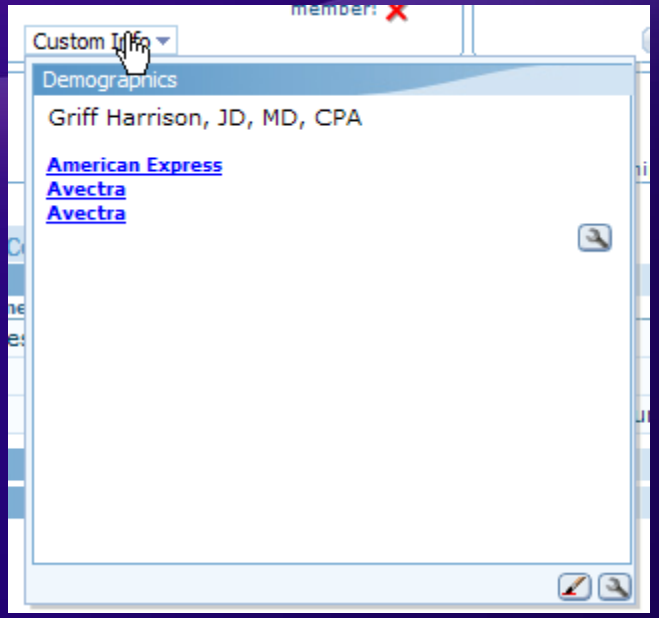
```
URL[javascript:void(0);] MENU[form] TYPE[div]
   FORMKEY[c9389101-bb99-47a3-905a-f904db8e38e4]
   DIRECTION[RB]

Also: 633733da-f86b-4889-a55c-7e4d0ee45df0
```

Result

- Popup forms that show more information





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10 of 10 – Content Item Links

- Adding a **content item link** that launches a list page for an **existing query**

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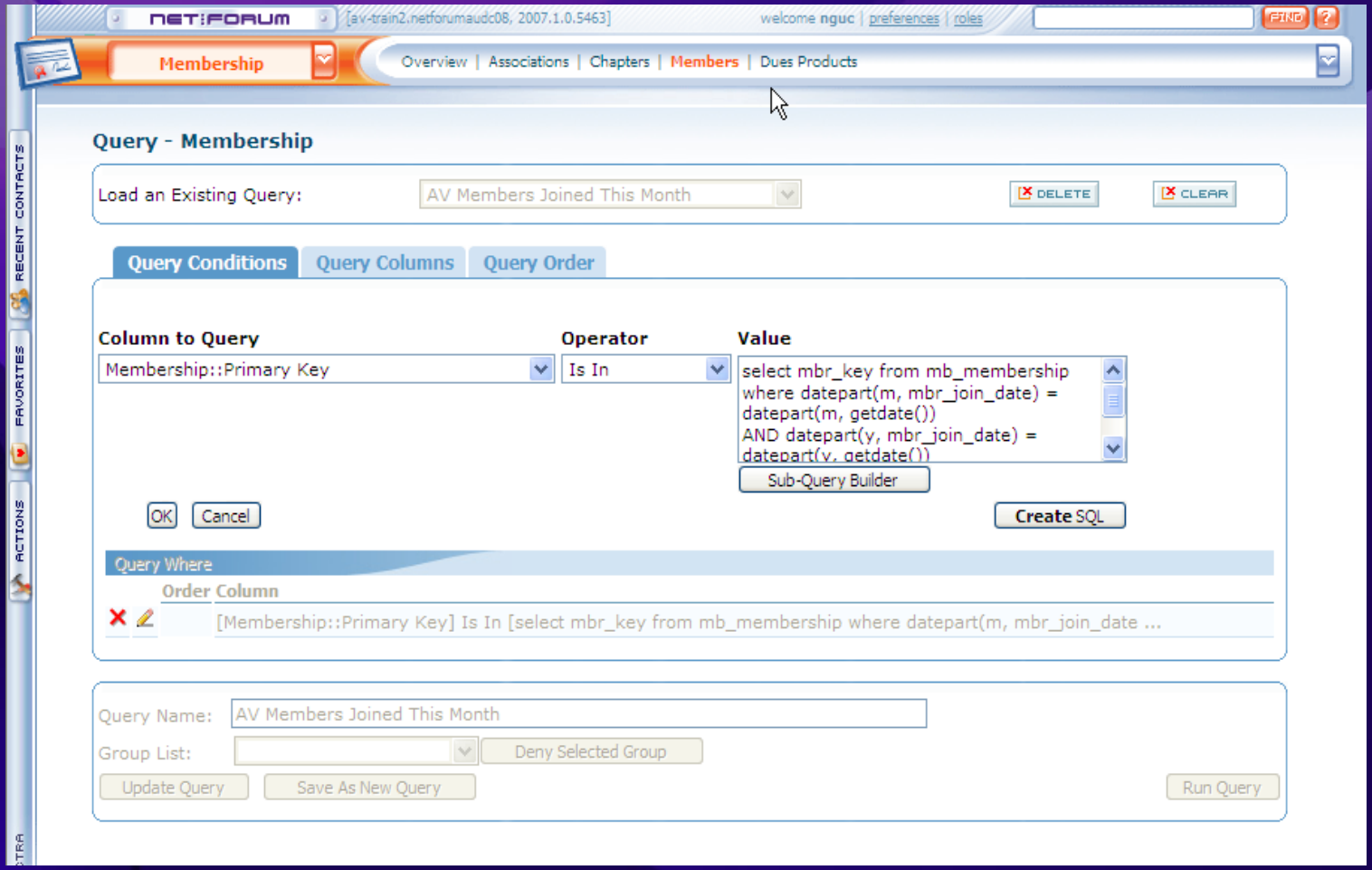
Requirement

- Ability to quickly navigate to a list of members joined within this month

Solution

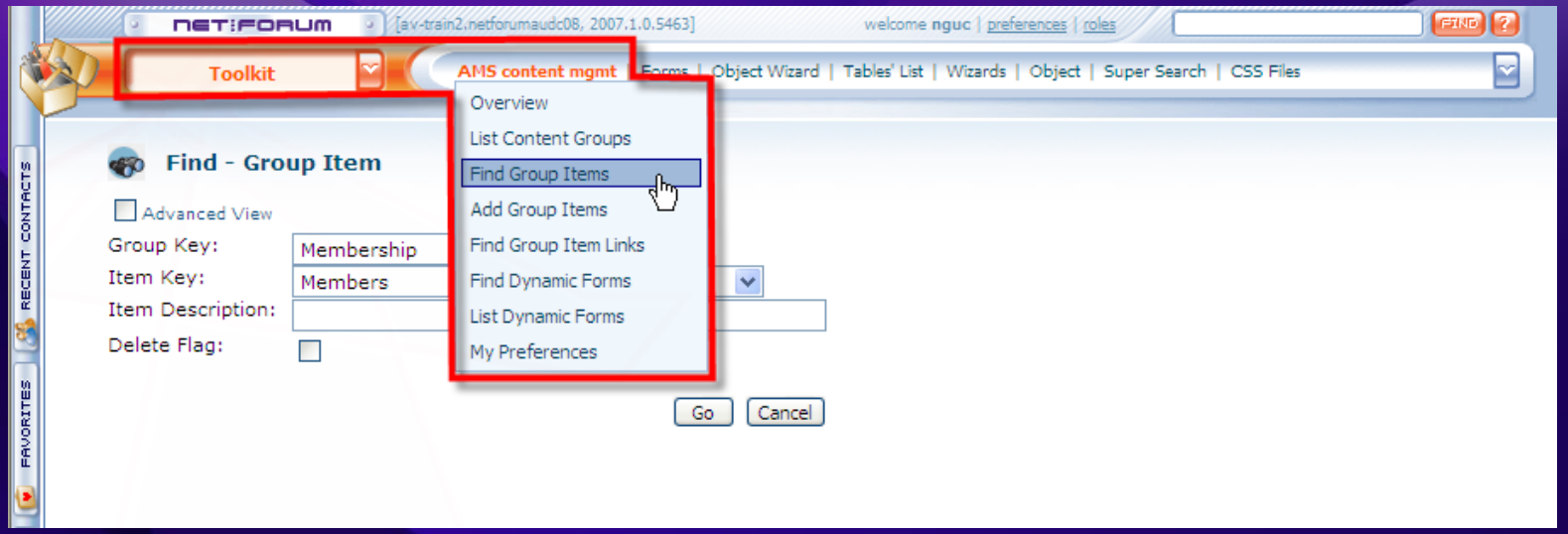
- A new netFORUM Query will be created to pull members joined in the current month
- A new **Content Item Link** will be added that references the new **Query**

Create a New Query



Content Item Link

- Search for Content Item:



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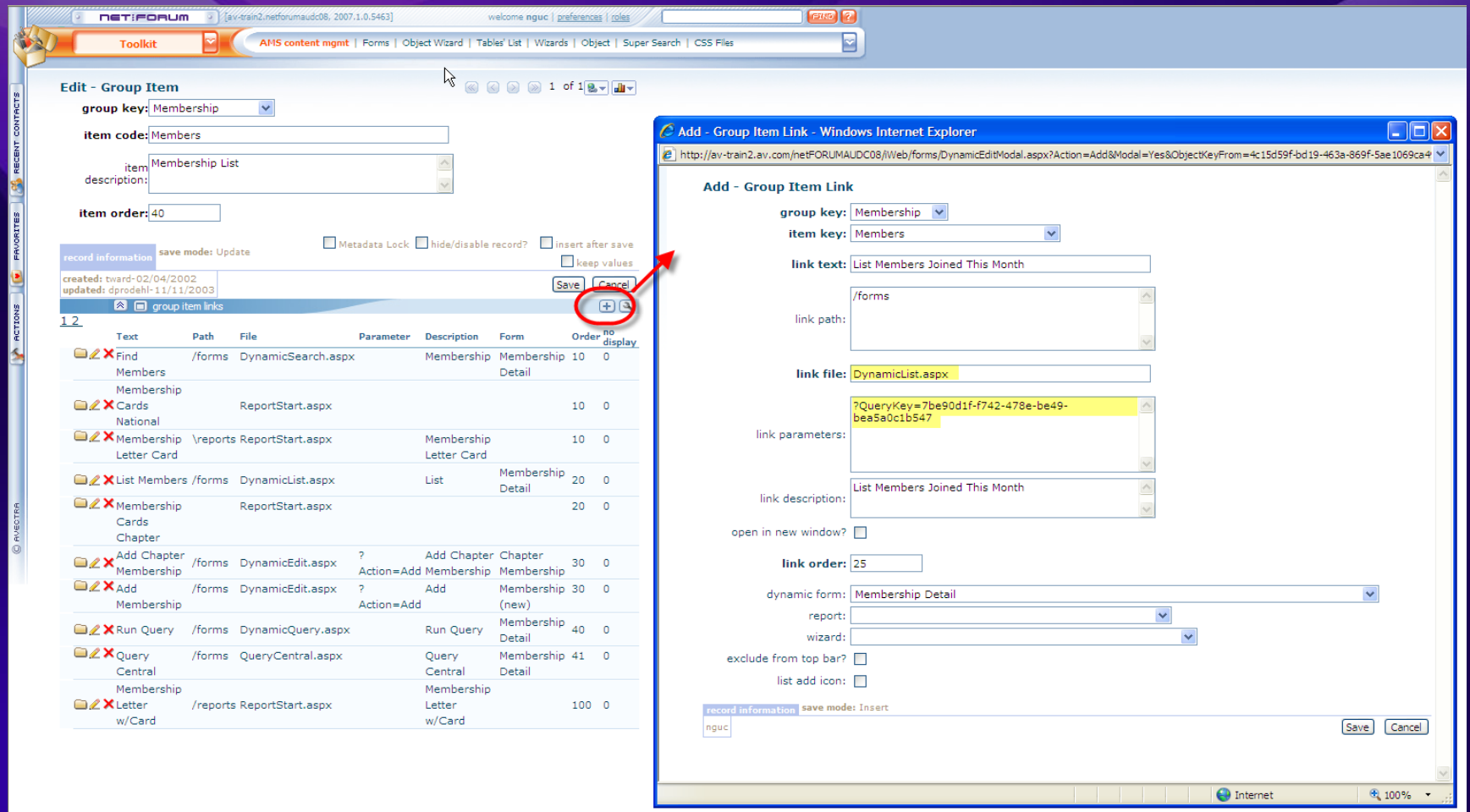
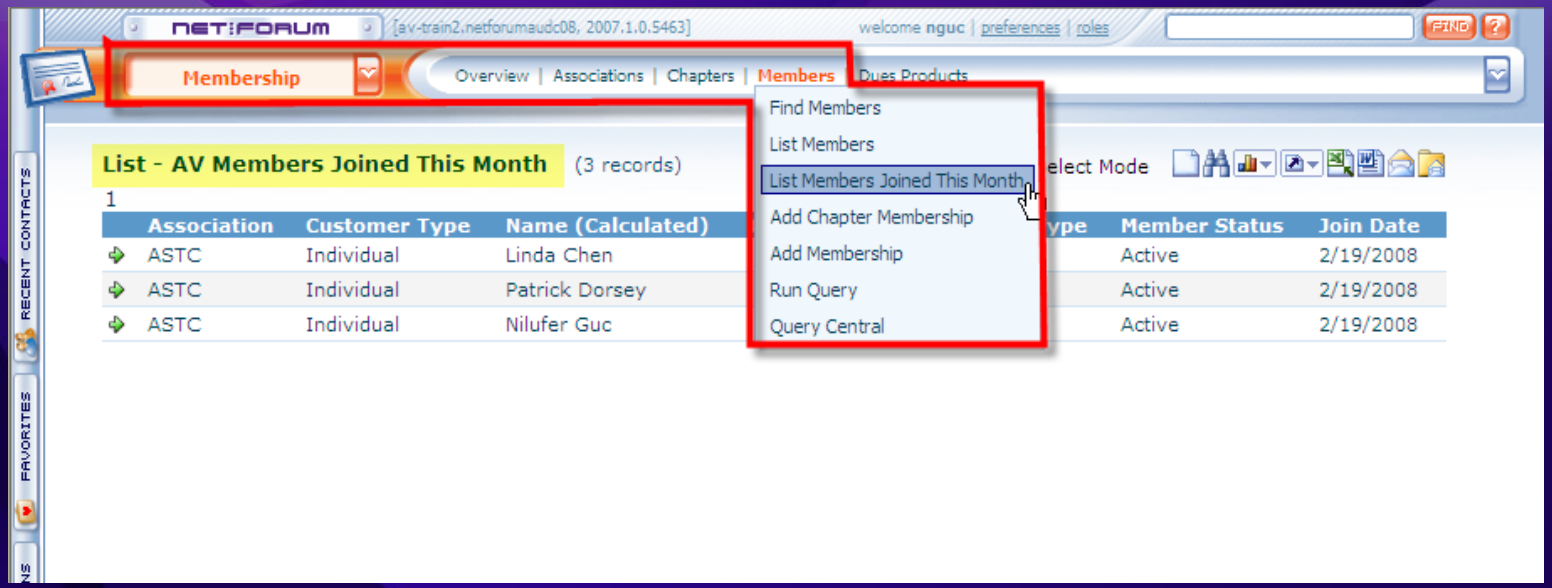
Content Item Link

- Add Link for the Content Item:



Result


netFORUM
[av-train2.netforumaudc08, 2007.1.0.5463]
welcome nguc | preferences | roles
FIND
Membership
Overview | Associations | Chapters | Members | Dues Products
Find Members
List Members
List Members Joined This Month
Add Chapter Membership
Add Membership
Run Query
Query Central
List - AV Members Joined This Month
(3 records)
elect Mode
RECENT CONTACTS
FAVORITES
Association
Customer Type
Name (Calculated)
Member Status
Join Date
ASTC
Individual
Linda Chen
Active
2/19/2008
ASTC
Individual
Patrick Dorsey
Active
2/19/2008
ASTC
Individual
Nilufer Guc
Active
2/19/2008

Conclusion

- Fast
- Easy
- Possibilities are available
- A dozen samples just to give you vision

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Questions

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Thank You

ACHIEVEMENT

You can do anything you set your mind to when you have **vision**, **determination** and an endless supply of **expendable labor** ☺