10 Things You Didn't Think You Could Do in 10 Minutes with the Toolkit

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Welcome to 10 *More* Things!

✧ Things happen in ③

✧ Third year for this session

✧ Three Avectrans, three clients, ten times the fun

✧ View the presentations from earlier years here:

  ✧ [AUDC 2008](#)
  ✧ [AUDC 2009](#)

10 Things

1. Dynamic Variable
2. Child Forms in Email Templates
3. Parsed Values in Form Titles
4. Visibility SQL in eWeb
5. Item Link to Launch Query
6. Form Designer – Control Behavior
7. Child Form to Display Extenders
8. Customer Lookup with Add Links
9. Workflow
10. Super Search

#1 Dynamic Variable

✧ Use child_form_text parsed value to run a SQL statement

✧ Child form:

#1 Dynamic Variable

✧ Dynamic Parsed Value

Edit - Dynamic Search

Search Column

form: Batch

table: ac_batch

alias: [▾]

table column: [bat_arp_key [Period]   ▾]

☐ auto postback?

control class: [DropDownList   ▾]

check auto postback only when other search columns are defined by this search column

order: [300]

default operator: [▾]

search field default value: {child_form_text^55d6f00c-fb12-45f1-a6eb-944137896496:\W*(.+)\W*~$1}

search field description: [   ] optional override of default description

DropDownList Configuration - Override

enter dropdownlist only when you want to override the default dropdownlist definition of this column for this particular search column. This is rarely done.

value from table: [ac_ar_period join ac_ar_fiscal_year on arp_afy_key=afy_key]

value column: [arp_key]

display value text: [arp_code]

value where: [arp_delete_flag=0 and arp_afy_key in (select afy_key from ac_ar_fiscal_year (nolock) where afy_atc_key={bat_atc_key})]

value order by: [arp_add_date]

[ADVANCED]

#1 Dynamic Variable

✧ Period field defraults:

#2 Child Forms in Email Templates

✧ Use child_form_html in email template to list records

✧ Child form:

Edit - Dynamic Form Child

Child Form

description:	Individual -> Invoices - for email template
title for grid:	
parent form:	Individual
destination form:	Invoice - Edit (detail)
parent child form:	
order:	999999
child key column:	inv_key *(you must select this column in* **select sql***)*

Child Form Action Icons

allow add? ☐ ⊞
allow edit? ☐ ✐
allow delete? ☐ ✗
allow go to? ☐ ➡
allow export? ☐ 📊
allow preview? ☐ ⓘ

Note: Child form menus will ONLY work with Designed Forms and ONLY on iWeb.

```
select      inv_key,
            inv_code_cp  AS [Invoice Number],
            convert (char(11), inv_trx_date) AS [Invoice Date],
            (select sum(ivd_parity_amount_cp) from ac_invoice_detail (nolock)
                    where ivd_inv_key=inv_key and ivd_delete_flag = 0
                    and ivd_void_flag = 0 ) AS [Invoice Amount],
            isnull((select sum(pyd_amount)  from ac_payment_detail (nolock)
                    JOIN ac_invoice_detail (nolock)
                            ON pyd_ivd_key=ivd_key
                    where ivd_inv_key=inv_key and pyd_delete_flag = 0
                    and pyd_void_flag = 0), 0) AS [Payment Amount],
    case    when inv_close_flag = 1 then ''
            else '<img src="../images/img_chkmk.gif" border="0"></img>'
            end AS [Open?]

from
            ac_invoice (nolock)
            JOIN co_customer (nolock)
                    ON inv_cst_key=cst_key
where
            inv_delete_flag=0
            and inv_cst_key={ind_cst_key}
            and exists (        select *
                                from ac_invoice_detail (nolock)
                                where ivd_inv_key = inv_key
                                and ivd_void_flag = 0
                                and ivd_delete_flag = 0)
order by inv_code_cp
```

(annotations) can include calculations, conversions, etc. anything you can do in SQL

can include HTML tags

filter list

Goto Override Form (optional)

goto key column:

de form:

...rm and Goto Key Column only when you wish the Goto button to go to a different form than the destination form. Goto Key Column will be used to select the record. Make sure that you select this column in the

Preview Override Form (optional)

preview key column:

preview override form:

Properties

is recursive? ☐

has override links? ☐

| Sub-Query Builder | Validate |

VISIBILITY SQL

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#2 Child Forms in Email Templates

✧ Email

Template

Edit - Correspondence Template   « ‹ › » 25 of 25

Message Template

list type: Individual   child form SQL's where caluse
                                   filters on {ind_cst_key}

code: ListInvoices   do not parse? ☐   **format:** Html

title: List of Invoices by Individual

subject: Here Are Your Invoices with Avectra

field list:

html body:

B I U ⊨ ⊧ ≡ ≡ ≡ ≡ ☰ ☷ ⧉ ✂ 📋 📋 ☲ 🌐 🖼   ☐ Show HTML ☐ Borders
                                                                              Full Screen
Font ▾   Size ▾   Color ▾

Dear {ind_full_name_cp},   can include other parsed
                                    values, or HTML tags as you
                                    would in any correspondence
Per your request, here are your invoices with Avectra: template

    {child_form_html^04fa3081-c39b-44ec-886e-b4c407946813}   copy and paste child form's key

Please review and let us know if you have any questions.

Thanks,
The Avectra Team

☑ Preserve absolute path for links (for emails in html format)

text body:

Dear {ind_full_name_cp},

Per your request, here are your invoices with Avectra:

{child_form_text^04fa3081-c39b-44ec-886e-b4c407946813}   for text version, without any
                                                          HTML tags
Please review and let us know if you have any questions.

Thanks,
The Avectra Team

#2 Child Forms in Email Templates

✧ Email includes list of records returned by SQL in child form:

From:	nuslu@avectra.com			Sent:	Tue 3/23/2010 12:52 AM
To:	Nilufer Uslu				
Cc:					
Subject:	Here Are Your Invoices with Avectra (Sample Copy)				

Dear Mr. John J. Andersen, Jr.,

Per your request, here are your invoices with Avectra:

Invoice Number	Invoice Date	Invoice Amount	Payment Amount	Open?
57689	Mar 16 2010	120.0000	120.0000	
57690	Mar 16 2010	1000.0000	1000.0000	
57691	Mar 22 2010	25.0000	0.0000	✓

Please review and let us know if you have any questions.

Thanks,
The Avectra Team

#3 Parsed Values in Form Titles

✦ Form Titles can Parse Values from the object

#3 Parsed Values in Form Titles

✧ Can do conditional parsing logic also

Edit - Dynamic Form

Form Information	enable ajax? ☐

object: Refund

form description: ACS Refund (Substitute)

form title: @{?request:keep==true?ACS Keep Credits?Refund}

form key: ee04af13-8ab7-4ce4-800a-8b8cde6ba9d8

Properties

- designed form? ☑
- has child forms? ☐
- has extension controls? ☑
- has profile form? ☐
- primary profile? ☐

Properties To Suppress

- no record info footer? ☐
- no delete button? ☐
- no hide/disable checkbox? ☐
- no save button? ☐
- display only? ☐

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#3 Parsed Values in Form Titles

✧ Link passes the 'keep' value indicating to the form which text to display

Edit - Group Item Link

group key:	Accounting
item key:	Refund
link text:	ACS Keep Credits
link path:	/forms
link file:	DynamicEdit.aspx
link parameters:	?Action=Add&ref_bat_key={DefaultBatch}&keep=true
link description:	Add
open in new window?	☐
link order:	15
dynamic form:	Refund
report:	
wizard:	
exclude from top bar?	☐
list add icon:	☐

#4 Visibility SQL in eWeb

✧ On an eWeb page, display content on a page conditionally based on the who the user is using [Visibility SQL](#).

Visibility SQL in eWeb

Visibility SQL in eWeb

Visibility SQL in eWeb

Visibility SQL in eWeb

Visibility SQL in eWeb

```sql
SELECT   visible = 'yes'
FROM     co_customer
WHERE    cst_key IN (
         SELECT   cxc_cst_key_1
         FROM     co_customer_x_customer (NOLOCK)
                  INNER JOIN co_chapter (NOLOCK) ON cxc_cst_key_2 = chp_cst_key
                  JOIN co_relationship_type (NOLOCK) ON cxc_rlt_code = rlt_code
         WHERE    cxc_cst_key_1 = {Customerkey}
         AND ( cxc_end_date IS NULL
               OR DATEDIFF(dd, GETDATE(), cxc_end_date) >= 0
             )
         AND rlt_chp_area_access_edit_flag = 1 )
OR cst_key IN (
SELECT   cst_key
FROM     co_customer
         INNER JOIN dbo.co_individual ON ind_cst_key = cst_key
         INNER JOIN dbo.co_individual_x_organization ON ixo_ind_cst_key = ind_cst_key
         INNER JOIN dbo.co_organization ON org_cst_key = ixo_org_cst_key
WHERE    org_cst_key = '689dd765-165a-4d23-93ad-6a8ab5451354'
         AND ind_cst_key = {Customerkey} ) |
```

Check to see if logged-in user is an authorized chapter staff person

Check to see if logged-in user is an AAFP staff person

#5 Item Link to Launch Query

✧ Group Item Link
includes the
QueryKey

Edit - Group Item Link

group key: Events

item key: Event Planning

link text: List Active Events

link path: /forms

link file: DynamicList.aspx

link parameters: ?QueryKey=8b8652e0-925a-45e8-932e-64ba27c02db8

link description: List Event

open in new window? ☐

link order: 1

dynamic form: Events Details

report:

wizard:

exclude from top bar? ☐

list add icon: ☐

HyperLink to Launch Query

✦ Query Key
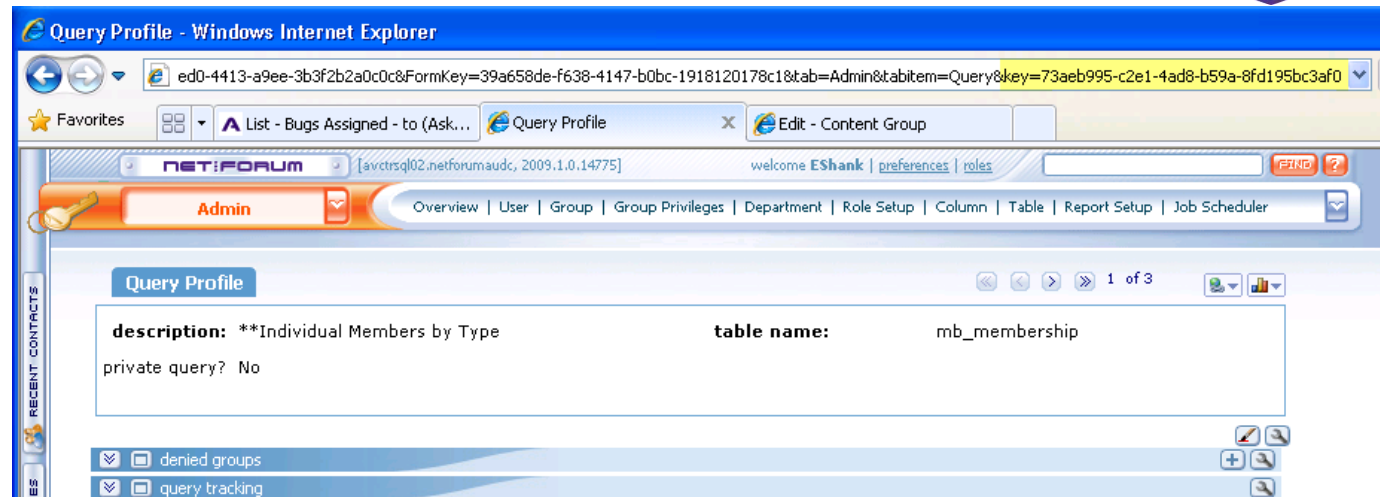
✦ Form Key
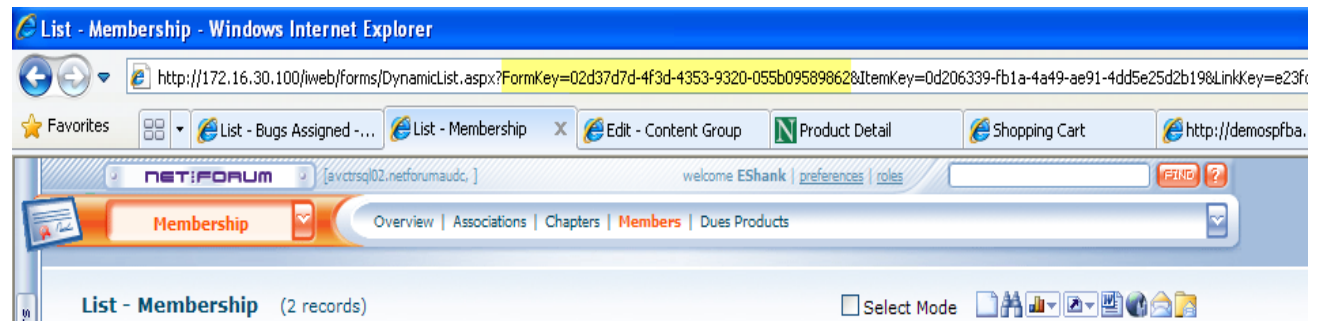
HyperLink to Launch Query

✧ Create the Link

URL/Image Path/Data: `url[DynamicList.aspx?FormKey=02d37d7d-4f3d-4353-9320-055b09589862&QueryKey=73aeb995-c2e1-4ad8-b59a-8fd195bc3af0]`

Form Link to Launch Query

✧ Form Link

#6 Form Designer – Control Behavior

- Toolkit Form Designer enables you to put apply **invisible**, **read-only**, or **required** conditions on a control based on any data in netFORUM related to the record being processed.

Form Designer – Control Behavior

✧ Design the Form, select the control, check the **checkbox** and write the SQL in the **URL/Image Path/Data** textarea.

✧ SQL command must return a recordset. 0 rows means control will *not* be invisible, read-only or required. 1 row or more means the control will be invisible, read-only or required.

Form Designer – Control Behavior

✧ Use this feature sparingly to avoid excessive SQL hits.

✧ Optimize SQL. Do it right the first time! No `SELECT *`, use `NOLOCK`, etc.

✧ As a convention, we write `SELECT invisible = 'yes' FROM...` but it really doesn't matter what you write, as long as you return a recordset.

✧ You can use:

  ✧ InvisibleSQL

  ✧ ReadOnlySQL

  ✧ RequiredSQL

Form Designer – Control Behavior

✧ You can stack multiple condition types and refer to other active controls on the form. Example from COE:

Form Designer – Control Behavior

✧ Error messages *cannot* be tailored to the business rule, so avoid cryptic conditions that users won't understand, especially with Required conditions.

✧ Don't use this if you can parse existing values of the same Object. Go to SQL only for related data in other tables.

✧ More tips and instructions at http://wiki.avectra.com/Form_Designer#Control_Conditions

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#7 Child Form to Display Extenders

- If you don't want to mess with a baseline Profile Form, you can be tricky with a child form.

- Step 1: Create a **stored procedure** to pull the extender table information in rows

- Step 2: Add a child form that output the stored procedure results

Child Form to Display Extenders

```
select abs_key = abs_key_ext,
[Question] = 'Participants will be able to:',
[Answer] = replace(abs_goal1_ext,',','<br />')
    + case when abs_goal1_ext like '%Other%'
        and abs_goal1_other_ext is not null
        and abs_goal1_other_ext != ''
        then ' (' + abs_goal1_other_ext + ')'
        else '' end,
sort_by = 1
from ab_abstract_submission_ext with (nolock)
where abs_key_ext = @abs_key

union

select abs_key = abs_key_ext,
[Question] = 'Application Outcomes'
[Answer] = abs_goal2_ext
    + case when abs_goal3
        and abs_goal3_ext
        then '<br />' + a
        else '' end
    + case when abs_goal4
        and abs_goal4_ext
        then '<br />' + a
        else '' end,
sort_by = 2
from ab_abstract_submission_ext with (nolock)
where abs_key_ext = @abs_key

union
```

✧ STEP 1: Stored Procedure:

✧ Columns placed in rows with unions

✧ Comma delimited fields replaced with line breaks

✧ Other descriptions rendered in ideal location

Question	Answer
Participants will be able to:	Improve client satisfaction
	Improve employee satisfaction
	Improve productivity
	Improve quality
	Improve health of pet
	Save time
	Other (Improve human-animal bond)

Child Form to Display Extenders

✧ STEP 2: Child Form definition in Toolkit that executes the SP:

Child Form to Display Extenders

✧ Close up of Child Form from user perspective:

Question	Answer
Participants will be able to:	Improve client satisfaction
	Improve employee satisfaction
	Improve productivity
	Improve quality
	Improve health of pet
	Save time
	Other (Improve human-animal bond)
Application Outcomes:	Provide pet selection counseling
	Educate staff members on pet selection counseling
	improve client retention
Presentation Level:	Level 1 - Basic
Delivery Method:	Lecture
Length of Presentation:	1 hour
Percent Lecture:	100%
Percent Interactive:	0%
Target Audience:	Veterinary Technicians
Room Setup:	Theater
Audio/Visual Needs:	Additional wireless lavalier microphones
Given this presentation:	Other: Southwest Veterinary Symposium, AAHA, LSU
Submitted this proposal:	Other: Midwest Veterinary Conference, LVMA Winter meeting

aaha submission details

#8 Customer Lookup with Add Links

✧ Extend customer lookup functionality – use hyperlinks to add individual and organization records

Customer Lookup with Add Links

✧ Lookup returns both types of customers

Customer Lookup with Add Links

✧ Add links
allow adding
individual
and organization

#9 – Workflow

Goal - when individual submits a "Please send me a Certificant Information Bulletin (CIB)" request online via ASK AFP function, workflow should

a) Email a template that includes a link to CIB to the individual

b) Close the customer request generated by ASK AFP

c) Close a user assignment generated by ASK AFP

Steps

Design Workflow

Workflow Set up

active? ☑

rule name: CIB Requests

object: Contact Request ▾

data object: Contact Request ▾

data object control: cor :: Reason (cor_crr_code) ▾

value to trigger rule: [   ]

trigger on new value? ☐

trigger on old value? ☐

trigger on insert? ☑

trigger on update? ☐

trigger on delete? ☐

order: 1

Workflow Designer

order: 1

Workflow Designer

record information save mode: Update   ☐ Metadata Lock ☐ hide/disable record? ☐ insert after save ☐ keep

created: bkurihara-01/28/2010
updated: bkurihara-03/22/2010   [Save] [Delete]

☆ ▣ tasks

|	Task Name	Task Type	Link Type	Sta
✎ ✕ ⇨	Check if CIB Request	Condition	True/False	✓
✎ ✕ ⇨	Close Assignment	Object		
✎ ✕ ⇨	Close Customer Request	Object	Next	
✎ ✕ ⇨	Send CIB Email to Customer	E-Mail	Next	

Task 1 – check condition

Task 2 – Send Email

Task 3 – Close customer request

workflow rule:	CIB Requests
type:	Object
task name:	Close Customer Request
task description:	Close Customer Request

make available as a template? ☐

start task? ☐   stop work flow? ☐

order: 0

OBJECT WORKFLOW

object:	Contact Request
operation:	Update
selection query:	
condition:	cor_key='{cor_key}'

EMAIL WORKFLOW

correspondence template:	
e-mail to:	

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Task 4 – Close assignment

Workflow Information

workflow rule:	CIB Requests

make available as a template? ☐

type:	Object

start task? ☐   stop work flow? ☑

task name:	Close Assignment

order: 0

task description:	Close Assignment

OBJECT WORKFLOW

object:	Assignment
operation:	Update
selection query:	
condition:	coa_cor_key='{cor_key}'

EMAIL WORKFLOW

correspondence template:	
e-mail to:	

Workflow in Action

#10 Super Search

✦ The iWeb Super Search enables you to search by customer ID, Invoice number, etc. Type in search code:
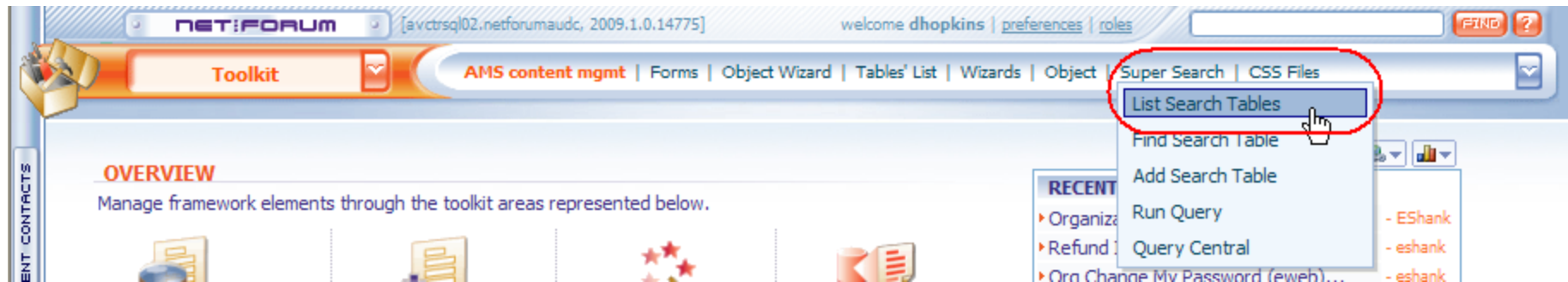

✦ and view the results:

Super Search

✧ You can add your own search indexes.

✧ Add more tables/columns to super search.

✧ View list of Search Table in Toolkit:

Super Search

✧ Standard super search tables:

List - Search Table (13 records)

1

	Table Name	Form Description	External (eWeb) Web Site Only?	Order
➡	md_web_content_detail	Web Pages - Search Results	✓	
➡	md_web_posting	Web Posting - Add - (referenced In Code)	✓	
➡	co_individual	Individual		10
➡	co_organization	Organization		20
➡	mb_committee	Committee		30
➡	co_keyword	Keyword	✓	40
➡	ev_event	Events Details		50
➡	ac_invoice	Order Entry/invoice		60
➡	oe_order	Order / Installment Billing		61
➡	ac_batch	Batch		65
➡	co_customer	Customer ID Search		70
➡	md_column	Column		100
➡	md_dynamic_form	Dynamic Form		200

Super Search

✧ Add a new **search column** to *existing* table:

Super Search

✧ Add a new search table. The form selects the destination page when the user chooses the record:

✧ and a new column:

Super Search

✧ Avoid adding too many search fields as it slows performance.

✧ Select **indexed** columns for performance.

✧ Not as flexible as Query Tool.

✧ Cannot conditionally choose destination forms based on "type" of record returned. Example: `co_customer` might be an Individual or Organization but you can have only one destination form.

✧ Composes SQL based on [List Tables](#).

✧ Works best with unique numbers and codes.

✧ See http://wiki.avectra.com/Super_Search for more.