Millennium Drive

Summary Page
Administrator's Guide

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Contents

Preface

The **Summary** page gives a comprehensive view of the constituent. Information is pulled from several Abila Millennium data sources to display on one page. Organizations can customize the data source details and layout for the **Summary** page.

As of Millennium Drive version 2014.1, customizing the **Summary** page is a back-end task, performed outside of the Abila Millennium and Millennium Drive applications. It is complex and classified as an advanced system or database administrator task. This guide contains the information that an administrator needs to start customizing the **Summary** page.

What is in this Guide?

- **Chapter 1** - Introduction
- **Chapter 2** - Customizing the Constituent Summary Page - introduces customizing the **Summary** page and configuring Millennium Drive to use a customized **Summary** page.
- **Chapter 3** - Summary Page Data - discusses the data sources for the **Summary** page and provides step-by-step instructions for using custom database views to control what data displays on the **Summary** page.
- **Chapter 4** - Layout for the Summary Page - discusses the Summary page layout and provides step-by-step instructions for using a custom file to control how the data and sections are laid out on the **Summary** page.
- **Chapter 5** - Updates to Millennium Drive - discusses how future updates to Millennium Drive will impact the data source and page layout for the **Summary** page. This chapter contains concepts that are important to organizations who maintain custom views and a custom layout for the **Summary** page.
- **Appendix A** - Millennium Drive Database Views - provides a detailed description of the standard database views that provide the data sources for the Summary Page, and the data mappings for each of these views.
- **Appendix B** - Examples - provides sample customizations that you can make to the **Summary** page data sources and page layout.

Chapter 1: Introduction

The Millennium Drive **Constituents** view **Summary** page shows important constituent information on one page. Information is pulled from Abila Millennium data sources including Basic Data, Addresses, Summaries and Attributes.

The standard Summary page includes the following sections and data:

- the constituent's name and title bar from his or her **Basic Data** record.
- a **Details** section for the birthdate and age, and a list of active prospect managers.
- an **Open Proposals** section to display information about the open proposals and active relationships that link to them.
- **LAST TOUCH | NEXT TOUCH** to describe the constituent's last interaction with your organization and the next scheduled task that is associated with him or her.
- a **Giving** section for Abila Millennium Summaries.
- a **Contact Information** section for good addresses and the phone, fax, and alternate phone numbers from those good addresses, additional phone numbers from the **Phone Numbers** table, and web addresses from the **Internet Address** table.
- attributes listed by type and group in the **Attributes** section.

Chapter 2: Customizing the Summary Page

This chapter introduces customizing the **Summary** page and configuring Millennium Drive to use the customized **Summary** page.

Options are available to allow each organization to customize the **Summary** page data sources and page layout. *Customizations will affect all users.*

- Dedicated Abila Millennium database views are the data sources for the **Summary** page. Your organization can customize what data displays on the page by creating custom database views that parallel the structure of the standard ones, and then configure Millennium Drive to use the custom views.
  Details about the **Summary** page data source and creating custom database views are located in *Chapter 3 - Summary Page Data.*
- A JavaScript Object Notation (JSON) file, located in the Millennium Drive directory, controls the page layout. Your organization can customize the **Summary** page layout by creating a custom JSON file, and then configure Millennium Drive to use the custom JSON file.
  Details about the page layout file and creating a custom layout file are located in *Chapter 4 - Layout for the Summary Page*.

Configuring Millennium Drive to use the Custom Views and Page Layout

Two settings in the Millennium Drive **Web.config** file tell the system to use the custom data sources and layout for the **Summary** page. **Web.config** is located in the Millennium Drive directory. The default location for is **\inetpub\MillMGO**. The settings are located in the **<appSettings>** section in **Web.config**, and they are independent of one another. This means that you can:

- use custom views with the standard page layout file,
- use the standard views with a custom page layout file,
- use both custom views and a custom page layout file, or
- continue to use the standard database views and page layout file.

Custom vs. Standard Views

The **<add key="UseCustomViewsConstituentSummary" value="true" />** setting in the **Web.config** file controls what set of views are used. If this setting is present in the **<appSettings>** section, then Millennium Drive will use the custom database views. If the setting is not shown, or if **value="false"**, then the system will use standard database views.

Custom vs. Standard Layout File

The **<add key="UseCustomLayoutConstituentSummary" value="true" />** setting in the **Web.config** file controls what page layout is used. If this setting is present in the **<appSettings>** section, then Millennium Drive will use the custom layout file. If the setting is not shown, or if **value="false"**, then the system will use the standard page layout file.

Note: Once you save the **Web.config** file, users must refresh the **Summary** page in order to see the changes.

Chapter 3: Summary Page Data

This chapter discusses the data sources for the **Summary** page and provides step-by-step instructions for using custom database views to control what data displays on the **Summary** page.

Abila Millennium database views that are dedicated to Millennium Drive control the data source details for the **Summary** page. These views:

- are created in the database when Millennium Drive is installed.
- are maintained by Abila and might be modified by future updates to Millennium Drive.
- should not be modified by your organization!

The following chart identifies the standard view (data source) for each section on the Summary page.

Summary Page Section	Database View(s)	Notes
heading	mgo_summary mgo_prefname	The mgo_prefname view links to mgo_summary to provide the constituent's name.
Details - date of birth, age	mgo_summary	Age is based on the date of birth
Details - Prospect Managers	mgo_prospsum	
Open Proposals		This section has no data source. It is copied from the constituent's Proposals page and cannot be modified on the Summary page. But, it can be removed. See *Chapter 4- Layout for the Summary Page*.
LAST TOUCH | NEXT TOUCH		This section has no data source. It is copied from the constituent's Touch Points page and cannot be modified on the Summary page. But, it can be removed. See *Chapter 4 - Layout for the Summary Page*.
Giving	mgo_givingsum	
Contact Information - Addresses	mgo_summary mgo_address	The mgo_address view links to mgo_summary to provide good addresses and the phone, fax, and alternate numbers from those addresses
Contact Information - Phone	mgo_phone	

Summary Page Section	Database View(s)	Notes
Contact Information - Web	mgo_internet	
Attributes	mgo_attribute	

Appendix A - Millennium Drive Database Views describes the standard database views in more detail and the data mappings for each of these views.

Customizing Summary Page Data

To customize **Summary** page data, you will create a set of database views that are identical to the standard views in terms of physical structure, and then modify *these* views. Do not modify the standard views! Abila provides a script for you to use to create the parallel views in the database, or you can create them yourself by using the script as a starting point.

When creating the custom views you must follow these rules:

- The column names, column order, data types, and column lengths in the custom views must exactly match those in the standard views.
- You must create a parallel custom view for every standard view even if you are going to modify only one or two. The **Summary** page will use either all of the standard views or all of the custom views.
- You must name the custom views as specified in this chart:

Standard view name	Custom (parallel) view name
mgo_address	mgox_address
mgo_attribute	mgox_attribute
mgo_givingsum	mgox_givingsum
mgo_internet	mgox_internet
mgo_phone	mgox_phone
mgo_prefname	mgox_prefname
mgo_prospsum	mgox_prospsum
mgo_summary	mgox_summary

Examples of view customizations that you can make include:

- Adding a WHERE clause to the **mgox_attribute** view to filter the attributes that display on the Summary page.

- Populating the custom fields in the **mgox_summary** view with relevant data from other linked tables (including tables external to Abila Millennium).
- Pulling calculated data into the **mgox_givingsum** view from sources other than the Abila Millennium Summaries (**memories**) data table.

Complete the following steps to use custom views for the Summary page:

1. Download the view generator script provided by Abila.
   a. Go to abila.com/support/knowledgebase and sign in to the Knowledgebase.
   b. Locate *KB article #10716 - Millennium Drive resources for Administrators* and download the script that corresponds to the database engine used at your organization.

   Note: The sample script can be used to create the parallel views in your database, or it can be used as a reference for you to use as you create your own. There are minor differences between the views that the sample script will create, and the standard views that are currently used by the **Summary** page. These differences are noted in the KB article, and once you complete **Step 4**, you can sign in to Millennium Drive (or refresh the **Summary** page if you are currently viewing it) to see the differences. You can edit the sample scripts or the views that they generate to remove the differences.
2. At the Web Server (IIS) computer, navigate to the Millennium Drive directory and open **Web.config**. The default location is **\inetpub\MillMGO**.
3. Locate the **<appSettings>** section and locate the **<add key="UseCustomViewsConstituentSummary" value="false" />** setting. Set value="true".
   If this setting is not present, then add <add key="UseCustomViewsConstituentSummary" value="true" /> to the **<appSettings>** section.
4. Save the changes to **Web.config**.
5. Use a database query tool to create ***all*** **mgox_** views in the Abila Millennium database. You can use the script provided by Abila or create your own views that are identical to the standard views in terms of physical structure.
6. Modify one or more of the **mgox_** views to meet your needs.
7. Once you are satisfied with your modifications, back up the custom views to a safe location.

You and other users who are currently viewing the **Summary** page for a constituent must refresh it to see the changes.

To return to the standard views for the Summary page:

1. At the Web Server (IIS) computer, navigate to the Millennium Drive directory and open **Web.config**.
2. Locate the **<appSettings>** section and locate the **<add key="UseCustomViewsConstituentSummary" value="true" />** setting. Set value="false".
3. Save the changes to **Web.config**.

Users who are currently viewing the **Summary** page must refresh it to see the changes.

Chapter 4: Layout for the Summary Page

This chapter discusses the page layout file for the **Summary** page and provides step-by-step instructions for using a custom file to control the data and sections layout on the **Summary** page.

Page layout is controlled by a JavaScript Object Notation (JSON) file named **constituentsummary.json**. This file is located in the Millennium Drive directory, and programmatically defines nested rows and columns to place labels, data, and sections on the **Summary** page. It is maintained by Abila and will be modified or replaced by future updates to Millennium Drive. Your organization should not modify the standard JSON file.

Customizing the Summary Page Layout

Important! In a future Millennium Drive update, Abila will be replacing the standard JSON file with a file that will have a different structure and syntax! Before you customize the layout for the **Summary** page for this version of Millennium Drive, carefully consider the time and resources that you will be spending on this effort. Review *Chapter 5 - Updates to Millennium Drive*.

To customize the layout for the **Summary** page, you will begin by creating a parallel JSON file based on the standard one, and then customize it. The name of the file must be **constituentsummary-x.json**. Do not modify the standard JSON file! Abila provides a sample JSON file for you to use, or you can create your own by using the sample as a starting point.

Examples of customizations that you can make include:

- removing data from the display,
- removing sections from the display,
- adding the custom columns that are available in the database views for Millennium Drive,
- rearranging the data or data sections,
- changing labels,
- changing fonts and colors and other style elements.

Complete the following steps to customize the layout for the Summary page:

1. Download and install the sample JSON file provided by Abila.
   a. Go to abila.com/support/knowledgebase and sign in to the Knowledgebase.
   b. Locate *KB article #10716 - Millennium Drive resources for Administrators* and download **constituentsummary-x.json** into the Millennium Drive directory on the Web Server (IIS) computer. The default location for the directory is **\inetpub\MillMGO**.

   Note: Use the sample file provided by Abila to directly control the Summary page layout, or use it for a reference as you create your own custom JSON file. There are minor differences between the **Summary** page layout that the sample custom file produces, and the layout that the standard page layout file produces. These differences are noted in the KB article, and once you complete **Step 4**, you can sign in to Millennium Drive (or refresh the **Summary** page if you are currently viewing it) to see the differences. You can edit the custom page layout file to remove the differences.
2. At the Web Server (IIS) computer, navigate to the Millennium Drive directory and open **Web.config**. The default location is **\inetpub\MillMGO**.
3. Locate the **<appSettings>** section and locate the **<add key="UseCustomLayoutConstituentSummary" value="false" />** setting. Set value="true".
   If this setting is not present, then add <add key="UseCustomLayoutConstituentSummary" value="true" /> to the **<appSettings>** section.
4. Save the changes to **Web.config**.
5. Modify **constituentsummary-x.json** to meet your needs.
6. Once you are satisfied with your modifications, save the changes and back up **constituentsummary-x.json** to a safe location.

You and other users who are currently viewing the **Summary** page for a constituent must refresh it to see the changes.

To return to the standard page layout:

1. At the Web Server (IIS) computer, navigate to the Millennium Drive directory and open **Web.config**.
2. Locate the **<appSettings>** section and locate the **<add key="UseCustomLayoutConstituentSummary" value="true" />** setting. Set value="false".
3. Save the changes to **Web.config**.

Users who are currently viewing the **Summary** page must refresh it to see the changes.

Chapter 5: Updates to Millennium Drive

This chapter discusses how future updates to Millennium Drive will impact the data sources (views) and page layout for the **Summary** page. This chapter is important to review if your organization maintains custom views and/or a custom layout for the **Summary** page.

Summary Page Data Considerations

Dedicated Abila Millennium database views are the data sources for the **Summary** page. If your organization customized the data sources, you are using customized database views that parallel the standard ones in terms of column name, position, data types, and column lengths.

When Abila updates Millennium Drive, standard database views (the view names that begin with **mgo_**) might be modified to add columns, change column definitions, or remove columns completely. Additional standard database views might be added to the database, and existing ones might be deleted. Changes to the standard database views will be documented in the release notes that will accompany Millennium Drive updates.

Abila will not overwrite or otherwise modify your organization's custom views (the view names that begin with **mgox_**). Your organization is responsible for making the corresponding changes to the custom views.

Although Abila will not touch your custom views, it is still important to have them backed up to a safe location.

Summary Page Layout Considerations

The **Summary** page layout is controlled by a JavaScript Object Notation (JSON) file, located in the Millennium Drive directory. If your organization customized the layout, then you are using a custom JSON file, and it most likely duplicates many of the elements that are present in the standard layout file.

When Abila updates Millennium Drive, the standard layout file (**constituentconfig.json**) might be modified to add or remove page elements, implement new functionality, and to support changes that are made to the standard database views. System changes that could break your custom layout will be documented in the release notes.

Abila will not overwrite or otherwise modify your organization's custom page layout file (**constituentconfig-x.json**). Your organization is responsible for making the corresponding changes to the customized layout

file. You will also be responsible for adding any changes that Abila makes to the standard database views to the custom layout file. For example, if column names in the views change, then references to them in the custom layout file must be changed as well.

Although Abila will not touch your custom layout file, it is still important to back it up to a safe location before installing Millennium Drive updates.

Appendix A: Database Views for Millennium Drive

The data sources for the **Summary** page are a set of dedicated Abila Millennium database views. This appendix includes names, descriptions, and detailed data mappings for the database views dedicated to Millennium Drive.

Address View

Standard view name: mgo_address

Custom view name: mgox_address

This view has one record per good address (addrlocatr='g')

Per constituent id number:

- the records are sorted and numbered in the **rownum** column.
- preferred addresses (addrmc1='Y') are listed first. There is a subsort on **addrkey** descending, so within the preferred and not preferred address groups, the records are sorted so that the most recently added is listed first.

The labels for the three phones addrphone, addraltph, and addrfaxph columns are hard-coded as 'Phone', 'Alt', and 'Fax'. The labels can be changed in the custom view definition.

Column #	Column Name	Data Type	Notes
1	Id	char(10), not null	
2	addrkey	numeric(13,0), not null	
3	rownum	bigint, not null	
4	addrmc1	char(1), not null	

Column #	Column Name	Data Type	Notes
5	TypeCode	char(6), not null	
6	TypeVal	char(65), not null	address type label (home, for example)
7	Line1	char(60), not null	
8	Line2	char(60), not null	
9	Line3	char(60), not null	
10	City	char(30), not null	
11	StateCode	char(6), not null	
12	StateVal	char(65), not null	
13	PostalCode	char(15), not null	
14	CountryCode	char(6), not null	
15	CountryVal	char(65), not null	
16	Phone1	char(30), not null	
17	Phone1Desc	varchar(65), not null	Hard-coded to 'Phone'
18	Phone2	char(30), not null	
19	Phone2Desc	varchar(65), not null	Hard-coded to 'Alt'
20	Phone3	char(30), not null	
21	Phone3Desc	varchar(65), not null	Hard-coded to 'Fax'

Attribute View

Standard view name: mgo_attribute

Custom view name: mgox_attribute

This view is the data source for the **Attributes** section on the **Summary** page, and it has one record per attribute.

Note: This view includes all constituent attributes and does not take into account if the attributes are not linked or if they are linked to another data table. You might want to add a WHERE clause to the custom view to retrieve only those attributes that link to Basic Data, to Donor Tracking, or to another data table.

Column #	Column Name	Data Type	Notes
1	attrkey	numeric(13,0), not null	
2	Id	char(10), not null	
3	TypeCode	char(6), not null	
4	TypeVal	varchar(65), not null	
5	GroupDesc	char(65), not null	
6	StartDate	datetime, not null	
7	StopDate	datetime, not null	
8	Descriptor1	char(65), not null	
9	Descriptor2	char(65), not null	

Giving Summary View

Standard view name: mgo_givingsum

Custom view name: mgox_givingsum

This view is the data source for the **Giving** information that displays on the **Summary** page. It has one record per Summaries (**memories**) record where:

memname = 'abila1', 'abila2', 'abila3', 'abila4', 'abila5', 'abila6', 'abila7', 'abila8', or 'abila9'

Note: This view contains all of the memories table custom columns, but the layout definition for the **Summary** page *currently* has the ability to only display the **descrip** (memory description) and **memamount** (amount) columns. Future versions of Millennium Drive will allow you to display the memories custom columns on the **Summary** page.

For Millennium Drive, the standard codes and values in the memory names (**memory_names**) lookup table are:

- **abila1** - Total Giving
- **abila2** - Consecutive Years Giving
- **abila3** - Largest Gift
- **abila4** - Total Giving Year to Date

The standard data source (view) and layout for the **Summary** page only displays Summaries records with these codes. If an organization wants different Summary records to display, it can do the following:

- Add the abila5, abila6, abila7, abila8, and abila9 codes to the memory names lookup table (with whatever values they want) and create records in the Summaries table that use these codes. Then. modify the standard layout to display them on the **Summary** page.

  OR

- Change the data source by creating a custom view to include memory name codes that it already uses. Then, modify the standard layout to display these names and amounts on the **Summary** page.

Column #	Column Name	Data Type	Notes
1	memkey	numeric(13,0), not null	
2	Id	char(10), not null	
3	memname	char(6), not null	
4	descrip	char(65), not null	
5	memdisp	char(6), not null	
6	memamount	money, not null	
7	memcrdate	datetime, not null	
8	memlookup1	char(6), not null	
9	memlookup2	char(6), not null	
10	memlookup3	char(6), not null	
11	memmny1	money, not null	
12	memmny2	money, not null	
13	memmny3	money, not null	

Column #	Column Name	Data Type	Notes
14	memmny4	money, not null	
15	memmny5	money, not null	
16	memmny6	money, not null	
17	memmny7	money, not null	
18	memmny8	money, not null	
19	memmny9	money, not null	
20	memmny10	money, not null	
21	memmny11	money, not null	
22	memmny12	money, not null	
23	memmny13	money, not null	
24	memmny14	money, not null	
25	memmny15	money, not null	
26	memmny16	money, not null	
27	memmny17	money, not null	
28	memmny18	money, not null	
29	memmny19	money, not null	
30	memmny20	money, not null	
31	memmny21	money, not null	
32	memmny22	money, not null	
33	memmny23	money, not null	
34	memmny24	money, not null	
35	memmny25	money, not null	
36	memmny26	money, not null	

Column #	Column Name	Data Type	Notes
37	memmny27	money, not null	
38	memmny28	money, not null	
39	memmny29	money, not null	
40	memmny30	money, not null	
41	memmny31	money, not null	
42	memmny32	money, not null	
43	memmny33	money, not null	
44	memmny34	money, not null	
45	memmny35	money, not null	
46	memdate1	datetime, not null	
47	memdate2	datetime, not null	
48	memdate3	datetime, not null	
49	memdate4	datetime, not null	
50	memdate5	datetime, not null	
51	memdate6	datetime, not null	
52	memdate7	datetime, not null	
53	memdate8	datetime, not null	
54	memdate9	datetime, not null	
55	memdate10	datetime, not null	
56	memdate11	datetime, not null	
57	memdate12	datetime, not null	
58	memdate13	datetime, not null	
59	memdate14	datetime, not null	

Column #	Column Name	Data Type	Notes
60	memdate15	datetime, not null	
61	memdate16	datetime, not null	
62	memdate17	datetime, not null	
63	memdate18	datetime, not null	
64	memdate19	datetime, not null	
65	memdate20	datetime, not null	
66	memdate21	datetime, not null	
67	memdate22	datetime, not null	
68	memdate23	datetime, not null	
69	memdate24	datetime, not null	
70	memdate25	datetime, not null	
71	memdate26	datetime, not null	
72	memdate27	datetime, not null	
73	memdate28	datetime, not null	
74	memdate29	datetime, not null	
75	memdate30	datetime, not null	
76	memyesno1	char(1), not null	
77	memyesno2	char(1), not null	
78	memyesno3	char(1), not null	
79	memyesno4	char(1), not null	
80	memyesno5	char(1), not null	
81	memyesno6	char(1), not null	
82	memyesno7	char(1), not null	

Column #	Column Name	Data Type	Notes
83	memyesno8	char(1), not null	
84	memyesno9	char(1), not null	
85	memyesno10	char(1), not null	
86	memyesno11	char(1), not null	
87	memyesno12	char(1), not null	
88	memyesno13	char(1), not null	
89	memyesno14	char(1), not null	
90	memtext1	varchar(255), not null	
91	memtext2	varchar(255), not null	
92	memtext3	varchar(255), not null	
93	memtext4	varchar(255), not null	
94	memtext5	varchar(255), not null	
95	memtext6	varchar(255), not null	
96	memtext7	varchar(255), not null	
97	memnum1	numeric(10,0), not null	
98	memnum2	numeric(10,0), not null	
99	memnum3	numeric(10,0), not null	
100	memnum4	numeric(10,0), not null	
101	memnum5	numeric(10,0), not null	
102	memnum6	numeric(10,0), not null	
103	memnum7	numeric(10,0), not null	
104	memnum8	numeric(10,0), not null	
105	memnum9	numeric(10,0), not null	
106	memnum10	numeric(10,0), not null	

Internet Address View

Standard view name: mgo_internet

Custom view name: mgox_internet

This view is the data source for the web addresses that display in the **Contact Information** section on the **Summary** page. The view has one record per internetaddress record where inttype='www', or (inttype like 'email%' and intaddress contains '@'). It excludes any internetaddress records where inttype begins with email, but there is no @ in intaddress.

- The type column classifies the record as an email or web address.
- The subtype column breaks down the web addresses into popular social media categories such as facebook, twitter, linkedin.

Column #	Column Name	Data Type	Notes
1	intkey	numeric(13,0), not null	
2	Id	char(10), not null	
3	intaddress	varchar(200), not null	
4	intmc1	char(1), not null	
5	intcomm	varchar(4000), not null	
6	type	varchar(1), not null	E = email W = web
7	subtype	varchar(8), not null	This is populated by logic in the view. For example, if intaddress contains facebook.com, subtype = facebook.

Name View

Standard view name: mgo_prefname

Custom view name: mgox_prefname

This view returns one name record per constituent

- If a constituent has only one preferred name row (nametype='a'), it will pick it
- If a constituent has multiple preferred names, it will pick the first preferred name found.
- If a constituent has no preferred name, it will pick the first name record found.
- If a constituent has no name record, the name is set to "no name record exists"

Column #	Column Name	Data Type	Notes
1	prefname_id	char(10), not null	
2	prefname_name	varchar(110), not null	
3	prefname_sort	char(30), not null	The corresponding namesmashd value
4	prefname_type	char(6), not null	Name type code (might be relevant in cases where there was no preferred name nametype='a')

Phone View

Standard view name: mgo_phone

Custom view name: mgox_phone

This view is the data source for the phone numbers (that are not part of an address record) that display in the **Contact Information** section on the **Summary** page. This view has one record per phone number.

Per constituent id number:

- the records are sorted and numbered in the **rownum** column.
- preferred phone records (phnmc1='Y') are listed first. There is a subsort on **phnkey** descending, so that within the preferred and not preferred phone groups, the records are sorted so that the most recently added is listed first.

Note: The Summary view (mgo_summary) is the data source for phone numbers that are part of an address record.

Column #	Column Name	Data Type	Notes
1	Id	char(10), not null	
2	phnkey	numeric(13,0), not null	
3	rownum	bigint, not null	
4	phnmc1	char(1), not null	
5	TypeCode	char(6), not null	
6	TypeVal	char(65), not null	Phone type label (cell for example)
7	Number	char(70), not null	
8	RestrictCode	char(6), not null	
9	RestrictVal	char(65), not null	

Prospect Manager View

Standard view name: mgo_prospsum

Custom view name: mgox_prospsum

This view is the data source for the prospect manager list the displays in the **Details** section on the **Summary** page. This view has the prospect managers for each constituent, and is based on relation records where:

- the constituent's **Rel Whose** relationship type has a **Prospect Management Role** of Prospect Manager (relationships.table_pm = 'pm'), and
- the relation **End** date (relstopdat) is NULL (empty).

The standard view definition assumes that each prospect manager has exactly one preferred name record.

- If a prospect manager has no preferred name, then the prospect manager is excluded from the list.
- If a prospect manager has multiple preferred names, then the prospect manager is listed multiple times for the same relationship.

Column #	Column Name	Data Type	Notes
1	Id	char(10), not null	The prospect's (constituent's) id
2	pm_id	char(10), not null	The prospect manager's id
3	pm_relkey	numeric(13,0), not null	
4	pm_name	varchar(110), not null	The prospect manager's preferred name.
5	pm_sort	char(30), not null	The namesmashd value from the prospect manager's preferred name.
6	pm_typecode	char(6), not null	The relationships.table_code for this relationship.
7	pm_typeval	char(65), not null	The relationships.table_val for this relationship.

Summary View

Standard view name: mgo_summary

Custom view name: mgox_summary

This view is the data source for the name and title bar, and for the **Details** and **Contact Information** sections on the **Summary** page. This view has only one record for each constituent, and includes:

- Basic Data information
- The preferred name column from the constituent's record in the **mgo_prefname** view.
- The first two addresses from the constituent's records in the **mgo_address** view, including the phone, fax, and alternate phone numbers and restrictions from those addresses.

- 30 custom columns that can be populated in the custom view definition with constituent-level information from either your choice of data tables or tables external to the Abila Millennium application.

Note: Phone records from the phone table are not included in this view. The **mgo_phone** view is the data source for phone numbers (that are not a part of an address) that display in the **Contact Information** section on the **Summary** page.

Column #	Column Name	Data Type	Notes
1	Id	char(10), not null	
2	Name	varchar(110), not null	Constituent's preferred name from the mgo_ prefname view.
3	Title	varchar(60), not null	From corettlbar
4	Birthday	char(2), null	The day of the constituent's date of birth. Birthday, Birthmonth, and Birthyear are calculated from the date field corebirthd if it is not empty, otherwise they are populated from the fields corebrthdy, corebrthmn, corebrthyr.
5	Birthmonth	char(2), null	The month of the constituent's date of birth
6	Birthyear	char(4), null	The year of the constituent's date of birth
7	a1_addrmc1	char(1), not null	All a1_ columns contain data for the first address row in the mgo_address view. This will be the preferred address if there is

Column #	Column Name	Data Type	Notes
			one.
8	a1_TypeCode	char(6), not null	
9	a1_TypeVal	char(65), not null	
10	a1_Line1	char(60), not null	
11	a1_Line2	char(60), not null	
12	a1_Line3	char(60), not null	
13	a1_City	char(30), not null	
14	a1_StateCode	char(6), not null	
15	a1_StateVal	char(65), not null	
16	a1_PostalCode	char(15), not null	
17	a1_CountryCode	char(6), not null	
18	a1_CountryVal	char(65), not null	
19	a1_Phone1	char(30), not null	
20	a1_Phone1Desc	varchar(5), not null	
21	a1_Phone2	char(30), not null	
22	a1_Phone2Desc	varchar(3), not null	
23	a1_Phone3	char(30), not null	
24	a1_Phone3Desc	varchar(3), not null	
25	a2_addrmc1	char(1), not null	All a2_ columns contain data for the second address row in the mgo_ address view.
26	a2_TypeCode	char(6), not null	
27	a2_TypeVal	char(65), not null	

Column #	Column Name	Data Type	Notes
28	a2_Line1	char(60), not null	
29	a2_Line2	char(60), not null	
30	a2_Line3	char(60), not null	
31	a2_City	char(30), not null	
32	a2_StateCode	char(6), not null	
33	a2_StateVal	char(65), not null	
34	a2_PostalCode	char(15), not null	
35	a2_CountryCode	char(6), not null	
36	a2_CountryVal	char(65), not null	
37	a2_Phone1	char(30), not null	
38	a2_Phone1Desc	varchar(65), not null	
39	a2_Phone2	char(30), not null	
40	a2_Phone2Desc	varchar(65), not null	
41	a2_Phone3	char(30), not null	
42	a2_Phone3Desc	varchar(65), not null	
43	date1	datetime, not null	The remaining columns are not populated in the standard view. They are available for whatever the organization needs when it defines the custom mgox_ summary view.
44	date2	datetime, not null	
45	date3	datetime, not null	
46	date4	datetime, not null	

Column #	Column Name	Data Type	Notes
47	date5	datetime, not null	
48	money1	money, not null	
49	money2	money, not null	
50	money3	money, not null	
51	money4	money, not null	
52	money5	money, not null	
53	number1	numeric(10,0), not null	
54	number2	numeric(10,0), not null	
55	number3	numeric(10,0), not null	
56	number4	numeric(10,0), not null	
57	number5	numeric(10,0), not null	
58	check1	char(1), not null	
59	check2	char(1), not null	
60	check3	char(1), not null	
61	check4	char(1), not null	
62	check5	char(1), not null	
63	text1	varchar(255), not null	
64	text2	varchar(255), not null	
65	text3	varchar(255), not null	
66	text4	varchar(255), not null	
67	text5	varchar(255), not null	

Appendix B: Examples

The following examples illustrate simple customizations that you can make to the **Summary** page data sources and page layout.

Display the Preferred Year

You want to display the constituent's preferred year instead of birthday and age on the **Summary** page **Details** section.

1. Review the steps in *Chapter 3 - Summary Page Data* to create the **mgo_x** views in the Abila Millennium database and configure Millennium Drive to use custom views.
2. Review the steps in *Chapter 4 - Layout for the Summary Page* to create **constituentsummary-x.json** in the Millennium Drive directory and configure Millennium Drive to use the custom page layout file
3. Edit the **mgox_ summary** view

   Replace the highlighted text:

   ```
   CAST('Custom Text 1' AS varchar(255)) AS text1,
   ```

   with

   ```
   CAST(coreprefyr AS varchar(255)) AS text1,
   ```

4. Edit **constituentsummary-x.json** to remove the age label and data and replace it with the preferred year label and data.

   Replace the highlighted text in this block of code:

   ```
   "cols": [
    {
    "colType": "xs",
    "colWidth": "4",
    "contentType": "static",
    "dataType": "label",
    "dataValue": "Born"
    },
    {
    "colType": "xs",
    "colWidth": "8",
   ```

```
 "contentType": "bound",
 "dataType": "composed",
 "dataValueArray": ["birthdate | date | append:' '", "age |
greaterThan:0 | number | prepend:' (' | append:' years old)'"]
 }
 ]
```

with:

```
"cols": [
 {
 "colType": "xs",
 "colWidth": "4",
 "contentType": "static",
 "dataType": "label",
 "dataValue": "Preferred Year"
 },
 {
 "colType": "xs",
 "colWidth": "8",
 "contentType": "bound",
 "dataType": "data",
 "dataValue": "text1"
 }
 ]
```

5. If you are currently viewing the **Summary** page, it must be refreshed before you can see your changes.

Display Giving Interests

Your organization uses attributes to keep track of constituent giving interests. Giving Interest attributes have an attribute group code of **gi** for Giving Interests. You only want to show attributes in the **Giving Interests** group on the **Summary** page.

1. Review the steps in *Chapter 3 - Summary Page Data* to create the **mgo_x** views in the Abila Millennium database and configure Millennium Drive to use custom views.
2. Review the steps in *Chapter 4 - Layout for the Summary Page* to create **constituentsummary-x.json** in the Millennium Drive directory and configure Millennium Drive to use the custom page layout fil

3. Edit the **mgox_ attribute** view to add the following WHERE clause:

```
WHERE attrgroup = 'gi'
```

4. Edit **constituentsummary-x.json**:

   a. Change the **Attributes** label to **Giving Interests** by replacing the highlighted text in this block of code:

```
"colType": "sm",
 "colWidth": "6",
 "contentType": "static",
 "dataType": "h1",
 "dataValue": "Attributes",
```

   with:

```
"colType": "sm",
 "colWidth": "6",
 "contentType": "static",
 "dataType": "h1",
 "dataValue": "Giving Interests",
```

   b. Remove the **Group** label and column from the list of attributes. Locate the following block of code. ***Delete the comma immediately before it***, and then delete the block of code:

```
{
 "colType": "xs",
 "colWidth": "2",
 "contentType": "static",
 "dataType": "label",
 "dataValue": "Group"
 },
 {
 "colType": "xs",
 "colWidth": "4",
 "contentType": "bound",
 "dataType": "data",
 "dataValue": "group",
 "extraInfo1": "",
 "formatOptions": [],
```

```
 "rows": []
 }
```

5. If you are currently viewing the **Summary** page, it must be refreshed before you can see your changes.

Display the Number of Years Giving

At your organization every constituent has a record in the Summaries (**memories**) table to keep track of the number of years of giving. The memory name code for this summary is **numyrs**. On the **Summary** page, in the **Giving** section, you want to display the **# Years Giving** instead of **Consecutive Years Giving**.

1. Review the steps in *Chapter 3 - Summary Page Data* to create the **mgo_x** views in the Abila Millennium database and configure Millennium Drive to use custom views.
2. Review the steps in *Chapter 4 - Layout for the Summary Page* to create **constituentsummary-x.json** in the Millennium Drive directory and configure Millennium Drive to use the custom page layout file
3. Edit the WHERE clause in the **mgox_ givingsum** view to add the following condition:

```
memname = 'numyrs'
```

4. Edit **constituentsummary-x.json** to replace the **Consecutive Years Giving** summary with the **# of Years Giving** summary.

   Replace the highlighted text in this block of code:

```
"colType": "xs",
 "colWidth": "3",
 "contentType": "bound",
 "dataType": "memory",
 "dataValue": "abila2"
```

   with:

```
"colType": "xs",
 "colWidth": "3",
 "contentType": "bound",
 "dataType": "memory",
 "dataValue": "numyrs"
```

5. If you are currently viewing the **Summary** page, it must be refreshed before you can see your changes.