Millennium Drive

User's Guide

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Contents

Preface

Community Brands Millennium Drive is an easy-to-use and interactive way for users to explore information about their active prospects and about other constituents, about their tasks, and about their portfolio of major gift proposals. Millennium Drive provides an improved user experience for viewing Millennium data. Data is gathered from Biographical, Giving, Prospect Management, and from the Events world, and presented for viewing and analysis in a variety of ways.

What is in this Guide?

This guide gives an overview of the Millennium Drive interface, reviews details about Millennium data as it applies to Millennium Drive, provides instructions for configuring data and system options in Millennium, and provides instructions for performing tasks in Millennium Drive.

- Millennium Drive Overview - introduces Millennium Drive and navigating within the application.
- Search for Constituents - use the Search Constituents feature to locate a constituent.
- Data in Millennium Drive - review relevant to Millennium Drive details about data, and how the system will use and display the data.
- Procedures - instructions for (1) configuring Millennium data for optimal display in Millennium Drive, (2) configuring Millennium system options that are used Millennium Drive, and (3) performing tasks in Millennium Drive.
- Documentation Resources - describes additional resources that are available for Millennium Drive users and administrators.
- System Administration - discusses topics of interest to the database administrator, network administrators, and Millennium system administrators.

Who is this Guide for?

This guide is geared to the following:

- Users who know how to maintain and display data in Millennium
- Users who will be training other users at your organization to use Millennium Drive.
- System administrators - Millennium, database and network

Chapter 1: Starting Millennium Drive

Before starting Millennium Drive the following requirements must be met:

- ✓ Millennium Drive must be installed and configured on the network. Secure Sockets Layer (SSL) must be implemented. See the *Millennium Drive Installation Guide* for full instructions.
- ✓ The user must have an Millennium user name and password.
- ✓ The Millennium user name must be linked to a constituent id number.

To start Millennium Drive:

1. Open the web browser and enter https:// plus the name of the Web Server into the address bar.

   Example: If the name of the Web Server is **VAW518999**, then enter https://VAW518999.

2. Enter the user name and password, and click **Login**.

   If SSL is not implemented, the user will not be able to sign in. Contact the Millennium system administrator.

After the user signs in, he or she will see the landing page for the Millennium Drive **Dashboard** view.

Chapter 2: Millennium Drive Overview

This chapter provides an overview of Millennium Drive, including concepts that are needed to understand the application, and the basic navigation and tasks the user will need when he or she first signs in to the application.

Concepts

Three main views comprise Millennium Drive.

The **Dashboard** view lets the user see progress in the application at a glance, including tasks, recently viewed pages, active prospects, and open proposals.

The **Constituents** view lets the user see summary and detailed information about individual constituents.

The **Reports** view lets the user analyze performance and progress toward goals for constituents, prospects, and prospect managers.

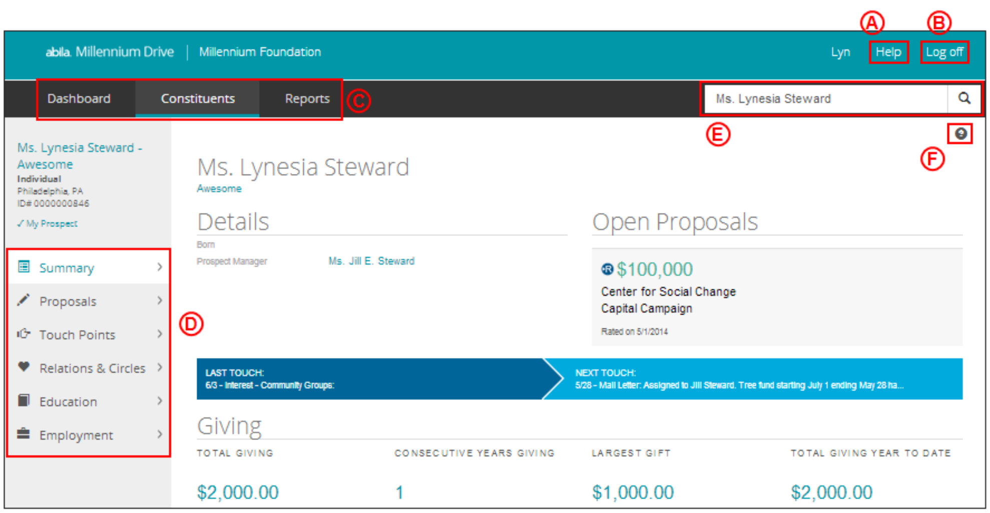
Navigating Millennium Drive

The top of the application (header) is always available as the user navigates through Millennium Drive. It shows the following items:

- Organization name
- Name of the current user
- A **Help** link to access FAQs
- A link to sign out of Millennium Drive
- The **Search Constituents** feature
- Tabs to access the **Dashboard**, **Constituents**, and **Reports** views. The color bar on a tab indicates that a view is active.

Each view has its own navigation menu that lets the user access more information within the view. Pages and forms within each view have a **Help** button to access information that relates to the page that the user is viewing or to the task that the user is performing.

The following example shows the **Constituents** view **Summary** page and is used illustrate Millennium Drive features and navigational components.

- **A** – Access FAQs about Millennium Drive
- **B** – Sign out.
- **C** – Tabs to access each of the Millennium Drive views. In this example, the color bar indicates the **Constituents** view is active.
- **D** – The navigation menu switches from one page to another within the **Constituents** view.
- **E** – Search for constituents.
- **F** – Access help about the **Summary** page.
- 

Dashboard View

The Millennium Drive **Dashboard** view is user-focused. Tasks and actions, open proposals in the user's portfolio, and prospect management information about the user's active prospects are available in the **Dashboard** view.

The **Dashboard** view has three pages: the landing page, **Tasks**, and **My Prospects**.

The **Dashboard** landing page is divided into four sections.

- **Tasks**: The **Tasks** section consists of a list of upcoming tasks in a summary, a detailed view, or in a calendar view. The user can edit an existing task or add a new task, and access the **Tasks** page.
- **Recently Viewed**: The **Recently Viewed** section lists the last ten constituents that the user viewed in Millennium Drive.

- **My Prospects**: The **My Prospects** section shows cultivation statistics about the user's active prospects. The user accesses the **My Prospects** page from the **My Prospects** section.
- **Open Proposals**: The **Open Proposals** section contains information about the major gift proposals that the user currently manages.

The **Tasks** page shows the user's upcoming and completed tasks in a variety of displays. Filters can be applied so that only upcoming, or completed, or high priority tasks are displayed. New tasks can be added and existing tasks can be edited on the **Tasks** page.

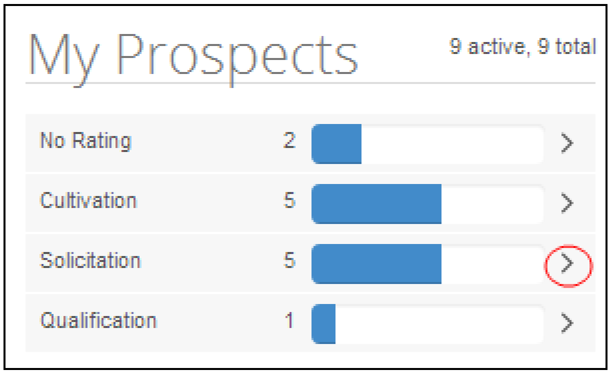
The **My Prospects** page lists the user's active prospects in either a summary or a detail view. A filter can be applied so that only the user's active prospects with open proposals are listed. Additional filters can be applied to list the user's active prospects by cultivation stage, rating campaign, and/or geographical location.

Navigating the Dashboard View

- The **Dashboard** landing page displays when the user first signs in to Millennium Drive.
  - To access the **Tasks** page, click the **View all** button in the **Tasks** section on the landing page.
  - To access the **My Prospects** page, click the **View all** button in the **My Prospects** section on the landing page.

  Once the user is viewing the **Tasks** or **My Prospects** page, he or she can use the navigation menu items to switch from one page to the other.

  Note: The navigation menu is not available on the **Dashboard** landing page. The user must be viewing either the **Tasks** or **My Prospects** page to see the navigation menu.
- To access the **Tasks** and **My Prospects** pages from the **Constituents** and **Reports** views in Millennium Drive, the user must first return to the **Dashboard** landing page, and then click the **View all** button in the **Tasks** or **My Prospects** section.
- From **My Prospects** section on the landing page, tap or click on a **Right** arrow > in the rating cultivation stage chart to access the **My Prospects** page already filtered by that stage.

- 

- Tapping or clicking a constituent's name in any one of the sections on the Dashboard landing page, and on the **Tasks** and **My Prospects** pages, will switch Millennium Drive to the **Constituents** view and display the **Summary** page for that constituent.

Constituents View

The Millennium Drive **Constituents** view focuses on the individual constituent. View just one piece of information about a constituent (for example, only employment information) or get an overall view of a constituent on one of the Millennium Drive constituent summary displays.

The **Constituents** view has seven pages. The **Search Constituents** feature is part of the **Constituents** view, and a **Quick View Summary** is located above the **Constituent** view's navigation menu.

- **Summary**: The **Summary** page gives a comprehensive view of the constituent. Information is pulled from many Millennium data sources including Basic Data, Address, Attribute. Giving information is pulled from Summaries.

  Important! Organizations can customize the data source details and layout for the **Summary** page to meet their specific business needs. If your organization has done this, the page you see might differ from what is described here.

- **Proposals**: On the **Proposals** page, details about all open, funded, and declined proposals and planned gifts for a constituent are shown. You can also add or edit a proposal or planned gift.

- **Touch Points**: The **Touch Points** page is also a summarized view of a constituent. It is a timeline graph and listing of a constituent's interactions with the organization. The information shown is also pulled from many different Millennium data sources.

  Filters can be applied so that only certain types of touches will be shown. Date range filters can also be applied.

- **Giving**: The **Giving** page offers several statistics on the constituent's giving history, including total giving, largest gift to date, and giving year totals. This information is pulled from Summaries.

  Important! Organizations can customize the data source details and layout for the **Giving** page to meet their specific business needs. If your organization has done this, the page you see might differ from what is described here.

- **Relations & Circles**: The **Relations & Circles** page lists a constituent's relationships and circle memberships.

  Filters can be applied to show only active relationships and circles or to show only the relationships that belong to a specific relationship group (Family, Business or Prospect Management groups, for examples).

- **Education**: The **Education** page shows a constituent's school records. Attributes that are linked to Education records are shown to indicate a constituent's involvement with his or her school.

- **Employment**: The **Employment** page shows employment (jobs) details, including business contact information,

- **Search Constituents**: The **Search Constituents** feature is located in the header, and it is available from all Millennium Drive views and pages.

- **Quick View Summary**: This summary is located above the navigation menu, and shows the selected constituent's name, photo, title bar (from the constituent's basic data information), constituent type, city and state, and ID number. If the constituent is deceased (or disbanded in the case of an organization), a label to that effect is also shown here.

  Tip: Tap or click on the constituent's name to refresh the current constituent's data.

Navigating the Constituents View

- The user can switch to the **Constituents** view from either the **Dashboard** or the **Reports** view by tapping or clicking the **Constituents** tab in the header. Information for the constituent whose name is shown in the **Search Constituents** box will be displayed.

- If the user is on the **Dashboard** landing page, the **Tasks** page, or the **My Prospects** page, tapping or clicking a constituent's name (if it is shown as a 'live' link) will switch Millennium Drive to the **Constituents** view and display the **Summary** page for that constituent.

- The navigation menu can be used to switch from one **Constituents** page to another.

- On a **Constituents** page, tapping or clicking a name (if it is shown as a 'live' link) will make that constituent the next selected constituent and the page will refresh to show the data for that constituent.

Reports View

The Millennium Drive **Reports** view focuses on analytics. It provides access to reports that analyze data about constituents and prospects, and about the user's pipeline, performance, and progress toward campaign goals.

The **Published Reports** page lists reports that have been published in Millennium specifically for viewing in Millennium Drive. The **Published Reports** page displays when the user clicks on the **Reports** tab.

For more information about publishing a report for viewing in Millennium Drive, see Publishing Reports for Millennium Drive in the *Procedures* chapter of this guide.

The **Visual Analyzer** page will list Visual Analyzer documents if your organization uses Visual Analyzer and if the current user is recognized as a licensed Visual Analyzer user that has been assigned to a QlikView group.

If your organization uses Visual Analyzer:

- The list of your organization's custom documents display when the user taps or clicks on the **Visual Analyzer** navigation menu item.
- Users tap or click the **Standard** button to display the list of Millennium standard Visual Analyzer documents, and tap or click **Custom** to redisplay the custom documents.
- Users tap or click on a document name to display it in the Visual Analyzer application.

Note: Visual Analyzer is an optional add-on feature for the Millennium software. Visual Analyzer documents deliver dashboard overviews and detail drill downs into the Millennium data.

Accessing Millennium Drive by Using a Mobile Device

The following points are geared to the user who accesses Millennium Drive by using a mobile device.

On a mobile device, the user might need to tap ⌄ to view all of the header information for Millennium Drive, including the **Help** link and the **Log off** link.

The **Search Constituents** input box may not automatically display on a mobile device. The user might need to tap 🔍 to display the search box, and then begin a search.

On a mobile device, only the icons may show on navigation menu items. The following chart matches the icons to actions.

Millennium Drive View	Icon	Action
Dashboard		display the Tasks page
		display the My Prospects page
Constituents		display the Summary page
		display the Proposals page
		display the Touch Points page
	$	display the Giving page
		display the Relations & Circles page
		display the Education page
		display the Employment page
Reports		display the Published Reports page
		display the Visual Analyzer page

Chapter 3: Search Constituents

Access the **Search Constituents** feature from all Millennium Drive views and pages. On a mobile device, the user might need to click on the **Search** button in the header to display the search box.

When searching for a constituent, consider the following:

- Search for a constituent by ID number, email address, or name.
- When searching by ID number, it is not necessary to enter the ID number's leading zeroes.
- Wild cards (_ and %) are supported when searching by email address or by name. Wild cards are not supported when searching by ID number.
- Email address and name searches are case-insensitive.
- Email address searches will look for a matching email address in the **Internet Address** table only. The system will not consider email addresses that are stored in the Phone Numbers table when performing an email address search.
- When searching by name, enter the name using free formatting. For examples:
  - First Name<space>Last Name (<space> means to enter a space between the name terms)
  - Last Name<space>First Name Initial
  - Last Name

  Or, use the standard Millennium name search formatting:
  - Last Name\First Name<space>Middle
- When searching by name using free formatting, enter the space between each name term.

  Example: Using the Millennium sample database in this example: if the user enters ShureJ, the search will not match any constituents. But, if the user enters Shure<space>J, the search will match Jeff Shure, whose ID number 0000000001.
- If the search criteria matches multiple constituents, a list of matching names will be displayed. Deceased constituents (or Disbanded, in the case of organizations) will be shown with the symbol "(D)" after the name.

- If the search criteria matches more than 20 names, the user might need to click on the **Show More** link in the search results list to locate the correct constituent.
- When performing a search from a page in either the **Dashboard** view or **Reports** view, Millennium Drive will switch to the **Constituents** view and display the constituent's **Summary** page.

Tip: At organizations with a large number of constituents, performing an ID number search, or performing a name search by using the standard Millennium name search formatting, will deliver results faster.

See "Searching for a Constituent" (page 31), for steps to follow when searching for a constituent.

Chapter 4: Data in Millennium Drive

This chapter discusses Millennium data as it is presented in Millennium Drive. To insure that the information presented in Millennium Drive is meaningful and complete, carefully consider how the following data is structured and maintained in Millennium.

- Attributes
- Circle Membership
- Contact Information
- Correspondence
- Education
- Employment
- Events and Activities
- Giving
- My Prospects
- Proposals and Planned Giving
- Relationships
- Summaries
- Tasks and Actions

Attributes

Attributes are shown on the standard layout for the **Constituents** view **Summary** page. By default, every attribute will be listed, but the **Summary** page can be customized so that only specific attributes are shown, or to remove attributes completely from the page.

A constituent's attributes also display on the **Touch Points** page. The system determines what attributes to display on the **Touch Points** timeline and in the **Touch Points** list based on the value of the **Major Gift Display** field in the Attribute Types (**attribute_types**) lookup table. An attribute will display only if the **Major Gift Display** field is set to 'Y'.

An attribute's **Start** date determines its placement on the timeline and in the list. If an attribute has no **Start** date, then placement is determined by the **Stop** date. If an attribute has no **Start** date and no **Stop** date, then the date that the attribute was created in the database will determine placement.

If more details are available for an item in the **Touch Points** list, you can click or tap the arrow next to the item summary ( ) to display the details.

Circle Membership

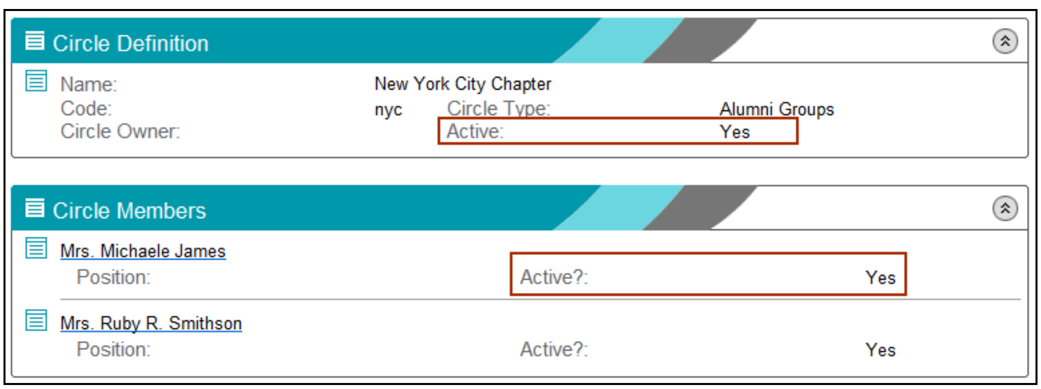
In Millennium Drive, a constituent's circle memberships display on the **Relations & Circles** page.

Circle memberships are grouped into **Active** and **Inactive** categories. The data can be filtered to show only active or only inactive circle memberships.

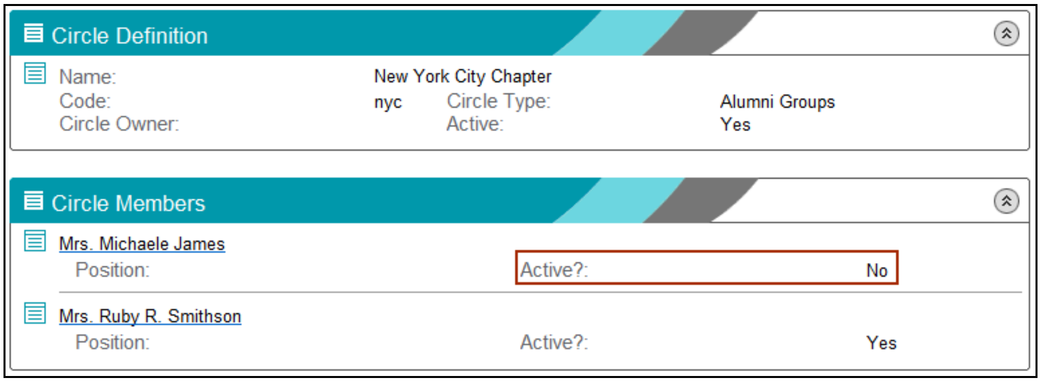
A circle membership is Active if the circle in which the constituent belongs (known as the circle definition) is active, *and* the constituent's circle member record is active too. So, if the circle (definition) is not active, then a constituent's circle membership will be inactive even if his/her circle member record *is* active.

Examples:

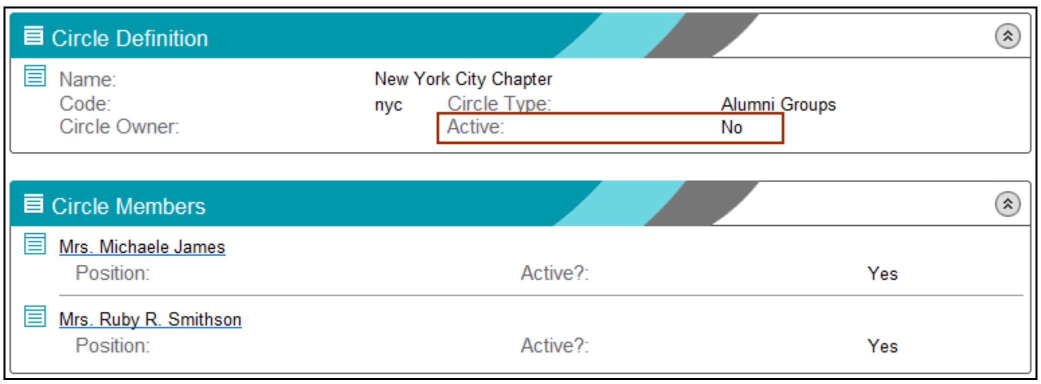
- In this example, the circle membership for Michaele is active because the circle definition is active *and* her circle member record is active.



- In this example, the circle membership for Michaele is inactive because her circle member record is not active.

- 

- In this example, the circle memberships for both Michaele and Ruby are inactive because the circle definition is not active.



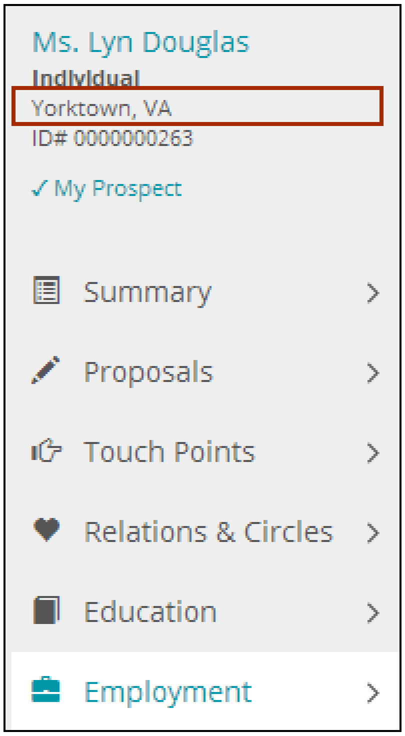
Contact Information

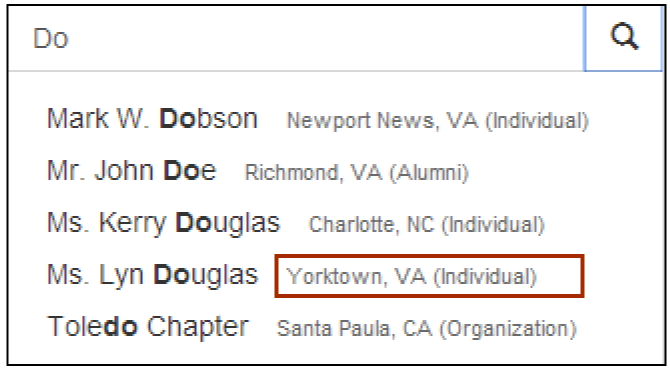
Address, phone number, and internet address data comprise contact information.

Contact information displays on the following **Constituents** view pages:

- **Employment**
- **Summary**

The **City** and **State** from the home address displays in the **Quick View Summary** (located above the navigation menu) and in **Constituent Search** results.





Contact Information on the Employment Page

The first line, city, state, and zip code for the address that links to an employment record displays with the employment row. Phone, fax, and alternate phone numbers, with restrictions (if any) from this linked address record are listed.

Records from the **Phone Numbers** table, and restrictions (if any), that *link to the address itself* are also listed. These records can be email and internet addresses that are stored in the **Phone Numbers** table. Records from the Internet Address table do not display on the **Employment** page.

Contact Information on the Summary Page

The standard layout for the **Summary** page displays up to two good addresses, and the phone, fax, and alternate phone numbers from those addresses, in the **Contact Information** section. The first one is the preferred address. If a constituent has more than two good addresses, the second one is the address that was most recently created in the database.

Records from the **Phone Numbers** table also display in **Contact Information** section. The preferred phone number is the first one listed. The option to send SMS text messages is available for mobile phones, if the constituent has opted to receive text messages. If your device allows click-to-call, you can also call the number by tapping or clicking it.

Records from the **Internet Address** table display in the **Contact Information** section if they have a **Type** that begins with email or www. Popular social media labels are applied to web (www) addresses that contain facebook.com, twitter.com, or linkedin.com. If an email address is shown, and your device supports it, you can tap or click the email address to launch your email application and send a message to the constituent.

Note: The **Summary** page can be customized to display different address, phone number, and internet address records, change labels, or remove the **Contact Information** section completely from the page.

Correspondence

In Millennium Drive, a constituent's correspondence records display on the **Touch Points** page.

The system determines what correspondence records to display on the **Touch Points** timeline and in the **Touch Points** list based on the value of the **Major Gift Display** field in the Correspondence Type (**correspondence_type**) lookup table and the value of the Major Gift Display field in the Correspondence Name (**correspondence_name**) lookup table. A correspondence record will display only if the **Major Gift Display** field is set to 'Y' for *both*.

Use the following chart to understand how the system will determine when to place a correspondence record on the **Touch Points** page.

Major Gift Display field for Correspondence Type	Major Gift Display field for Correspondence Name	Show record on Touch Points?
Y	Y	Yes
Y	N	No
N	Y	No
N	N	No

Tip: Simply set the **Major Gift Display** field on a Correspondence Type lookup table entry to 'N' to prevent all correspondence records with that **Type**, regardless of **Name**, from displaying on the **Touch Points** page.

A correspondence record's **Response** determines its placement on the timeline and in the list. The **Sent Date** is used if a correspondence record has no **Response Date** or when the **Response Date** is earlier than the **Sent Date**. If a correspondence has no **Sent Date** and no **Response Date**, then the date that the correspondence record was created in the database will determine placement.

Education

In Millennium Drive, education records display on the **Education** page. Attributes that link to an education record are labeled as **Involvement**. An education record will be highlighted if the **Institution** is your organization's home institution.

Home institution

One entry in the Institutions (**institutions**) lookup table can be designated as the home institution. Home institution is a system option, It is set on Millennium **System Settings** form by a Millennium system administrator or the database administrator. For instructions on how to designate an institution as the home institution, see Setting the Home Institution in the *Procedures* chapter of this guide.

Employment

In Millennium Drive, employment (jobs) records display on the **Employment** page. Jobs are classified as current or past. The constituent's primary job is indicated by a star.

Employment information includes the name of the **Firm** (employer). If the employer is a constituent, tap or click on the name to make the employer the next selected constituent. Business contact information for the constituent and employer matching policies are also shown.

Jobs status

Employment records are considered to be current or past based on **Status**. **Status** is controlled by the Jobs Status (**jobsstatus**) lookup table. If a record has a **Status** code of 'act' (for Active), then it is current. All other job statuses are past.

Primary job

If a constituent has more than one active job, it may be useful to indicate which one is the primary job. In Millennium Drive, star will indicate which employment record is the primary one. In Millennium. flag a record as Primary by selecting the **Primary** check box on the form when inserting or updating the employment record.

Note: By default, the **Primary** check box (**jobsprimry**) is not available on the standard Millennium employment display and maintenance forms. A Millennium system administrator or the database administrator will need to use the Custom Display Designer in Community Brands Millennium to add this field to the forms.

Contact information

Employee contact information displays only if an address is linked to an employment row. Contact information includes the first line of the address, the city, state, and zip code. Phone, fax, and alternate phone numbers, with restrictions (if any) from this linked address record are listed. Records from the **Phone Numbers** table, and restrictions (if any), that *link to the address* are also listed. These records can be email and internet addresses that are stored in the **Phone Numbers** table. Records from the Internet Address table do not display on the **Employment** page.

Matching

 indicates that the employer is a matching company. The employer's matching policy is also displayed.

 indicates that the employer is not a matching company.

Matching policy

The matching ratios and the minimum/maximum matching amounts from the employer's Basic Data record comprise the matching policy. In Millennium Drive, the matching ratios are shown as percentages instead of ratios. For examples, a ratio of 2.0 (two to one) displays as 200%. A 1.0 (one to one) ratio displays as 100%, and a 0.5 (half to one) ratio displays as 50%.

Events and Activities

In Millennium Drive, Events that a constituent has attended or will attend display on the **Touch Points** page.

An event will display on the **Touch Points** page only if the constituent has at least one activity attendance record for the event.

Both the **Start Date** and the **End Date** for the Event determine placement on the **Touch Points** timeline and in the list. If an event has no **Start Date**, then placement is determined by the event's **End Date**. If an event has no **Start Date** and no **End Date**, then placement is determined by the date that the first event *activity attendance* record for the constituent was created in the database.

Each event in the **Touch Points** list can expand to show details about the event and details about all of the event's activities that the constituent attended.

Gifts

In Millennium Drive, a constituent's gift transactions display on the **Touch Points** page.

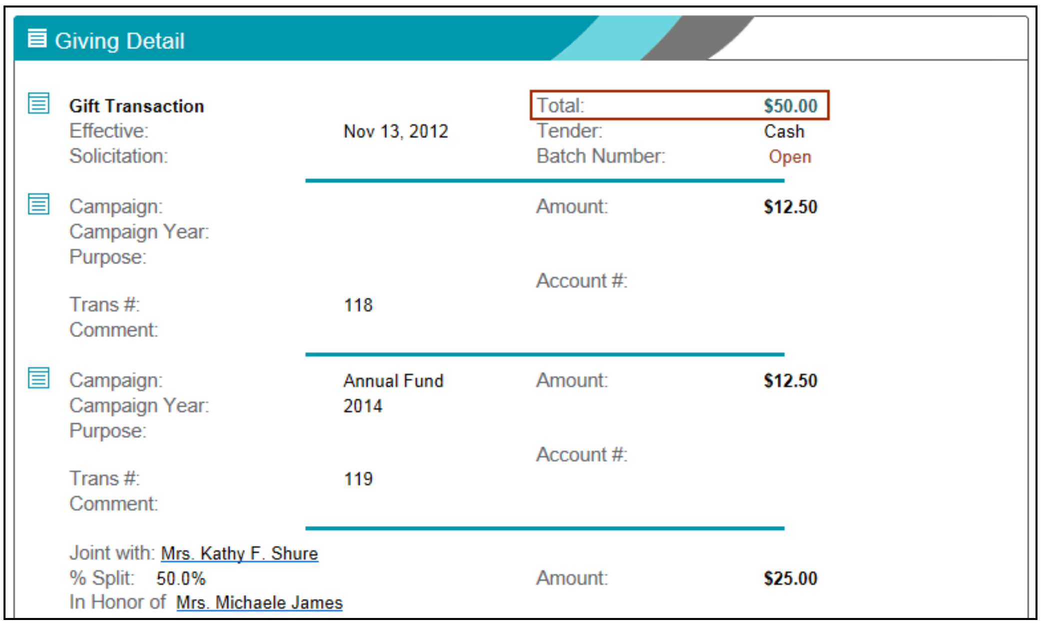
The system determines what gifts to display on the **Touch Points** timeline and in the **Touch Points** list based on the value of the **Major Gift Display** field in the Gift Types (**gift_types**) lookup table. A gift will display only if the **Major Gift Display** field is set to 'Y'.

The **Effective Date** for the gift determines its placement on the timeline and in the list.

Gift details

For all giving transactions, the total gift amount shown is the Total as it is displayed in the Millennium gift display.

Here is an example of the Total as it is displayed in Millennium:



For pledge payments, write-offs, and bequests that pay down an expectancy, both the date and total amount of the original pledge or expectancy transaction are shown.

All types of pledges and expectancies will show the total payments that have been made toward the pledge or expectancy, the total amount of write-offs, total credits and balance due.

If a giving transaction has multiple allocations, details about the gift will show only the first two allocations. If there are more than two, then the word "more" will indicate that a transaction has more than two allocations.

My Prospects

Information about a user's active prospects displays in the **My Prospects** section on the **Dashboard** landing page and on the **Active Prospects** page.

In the **My Prospects** section on the Dashboard landing page, cultivation statistics about the user's active prospects are displayed in chart form. This chart shows the number of active prospects that are at each rating cultivation stage.

The **Active Prospects** page, lists active prospects in a Summary or in a Details view. Filters can be applied to this list to show active prospects by:

- presence or absence of an open proposal
- cultivation stage
- rating campaign
- geographical location

Active prospect relationships

A prospect is counted in the cultivation statistics chart on the **Dashboard** view landing page, and is listed on the **Active Prospects** page only if the following relationship exists:

- The **Rel Whose** ID number is the ID number for the user who is logged onto Millennium Drive.
- The **Rel Is A** relationship type has a **Prospect Management Role** of Prospect (in the lookup table).
- The relationship has no **End** date, or it has an **End** date that is in the future.

Contact information

Every active prospect should have a preferred address. The city, state, and the phone number from the preferred address are shown on the **Active Prospects** page, and the active prospects can be filtered by the preferred address city and state.

An email address is shown if a preferred email exists in either the Internet Address or the Phone Number tables.

Ratings

An active prospect must have a ratings row in order to be included on the Dashboard landing page cultivation statistics chart.

An active prospect can have multiple active rating rows, with different cultivation stages for different campaigns. This prospect will be counted more than once in the cultivation statistics chart, but this prospect will be listed only once in the **Active Prospects** page.

An active prospect will be listed on the **Active Prospects** page even if he or she does not have an active ratings record (unless, of course, the user has applied a cultivation filter to the list).

Tracking

Every active prospect should have a Tracking record, and the **Capacity** to give should be included in the record if it is known. The Total Capacity is one of the pieces of information that is shown on the **Active Prospects** page, and the prospects can be sorted by the Total Capacity amount.

Proposals

The number of open proposals for an active prospect (if he or she has one or more open proposals) is shown on the **Active Prospects** page. A proposal is open if it does not have a **Funded Date** and it does not have a **Funded Amount**.

Proposals and Planned Giving

In Millennium Drive, proposals and planned gifts are classified as **Open**, **Funded**, or **Declined** based on the following values for **Funded Amount** and **Funded Date**:

Classification	Funded Amount	Funded Date
Open	$0	blank or NULL
Funded	greater than $0	not blank and not NULL
Declined	$0	not blank and not NULL

View both Proposals and planned gifts on the **Constituents** view **Proposals** page. Open proposals for an individual constituent are shown on the **Constituents** view **Summary** page. In the **Open Proposals** section on the **Dashboard** landing page, view open proposals that have been presented to the user's active prospects.

Proposals and planned gifts are primarily identified by **Purpose**. On the **Proposals** page, additional information such as **Campaign** and **Campaign Year**, and the **Rated**, **Asked**, and **Funded** dates and amounts are also shown on the **Proposals** page.

Update the **Rated**, **Asked**, and **Funded** dates and amounts in Millennium as a proposal or planned gift moves from one status or phase to the next. This insures that closed (funded or declined) proposals will not in the **Open Proposals** section on the **Dashboard** landing page, and that the proposals and planned gifts that are shown on the **Proposals** page can be grouped into the correct status and phase.

Open Proposals on the Dashboard Landing Page

Proposals are listed in the **Open Proposals** section on the landing page if the following conditions are met:

- The proposal owner has an active constituent relationship where the **Rel Whose ID** number is the ID number for the user who is signed in to Millennium Drive, the Rel Is A relationship type has a **Prospect Management Role** of Prospect (in the lookup table), and the relationship has no **End** date or the **End** date is in the future.
- The proposal is not funded and it is not declined.

Proposals and Planned Giving on the Constituents Proposals Page

On the **Proposals** page, proposals and planned gifts are grouped as **Open**, **Funded**, or **Declined**. Open proposals can be either in a Rated or in an Asked phase.

The following icons identify the status or phase of a proposal or planned gift.

 indicates that an open proposal or planned gift is in the Rated phase. The dollar amount shown is the **Rated Amount**.

 indicates that an open proposal or planned gift has moved into the Asked phase. The dollar amount shown is the **Asked Amount**.

 indicates a funded proposal or planned gift. Both the **Funded Amount** and the **Asked Amount** are shown.

 indicates a declined proposal or planned gift. The dollar amount shown is the **Asked Amount**. If there wasn't an asked amount, then the **Rated Amount** is shown instead.

Active relationships that link to a proposal or planned gift are shown after the proposal or planned gift details. (Recall that an *active* relationship is a relationship with no **End** date, or has an **End** date in the future.) In a constituent relationship, tapping or clicking the related constituent's name will make that constituent the next selected constituent.

Proposals on the Constituents Summary Page

The **Summary** page shows the open proposals and active relationships that link to them. These are the same open proposals and relationships that are shown on the constituent's **Proposals** page. In a constituent relationship, tapping or clicking the related constituent's name makes that constituent the next selected constituent.

Note: The **Summary** page can be customized to remove all open proposals from the page. However, it cannot be customized to limit or expand what proposals and linked relationships are shown.

Downloading Attachments

Any documents associated with the proposal can be downloaded by using the Attachment link at the bottom of the gift or proposal summary.

Relationships

Relationships display on the following **Constituents** view pages:

- **Relations & Circles**
- **Proposals**
- **Summary**

In addition, relationships are used to determine who are the user's active prospects. This information is used on the Millennium Drive **Dashboard** view when:

- displaying open proposals on the landing page
- counting prospects in the cultivation statistics chart on the landing page
- listing prospects on the **My Prospects** page

Active vs. Inactive Relationships

The **Begin** and **End** dates on a relationship determine if it is active or inactive. Use the following chart to understand how the system will determine if a relationship is active or inactive.

Begin Date Value	End Date Value	Active or Inactive Relationship
blank or null	blank or null	Active
blank or null	in the past	Inactive

Begin Date Value	End Date Value	Active or Inactive Relationship
blank or null	in the future	Active
in the past	blank or null	Active
in the past	in the past	Inactive
in the past	in the future	Active
in the future	blank or null	Inactive
in the future	in the past	Inactive
in the future	in the future	Inactive

Relationship types

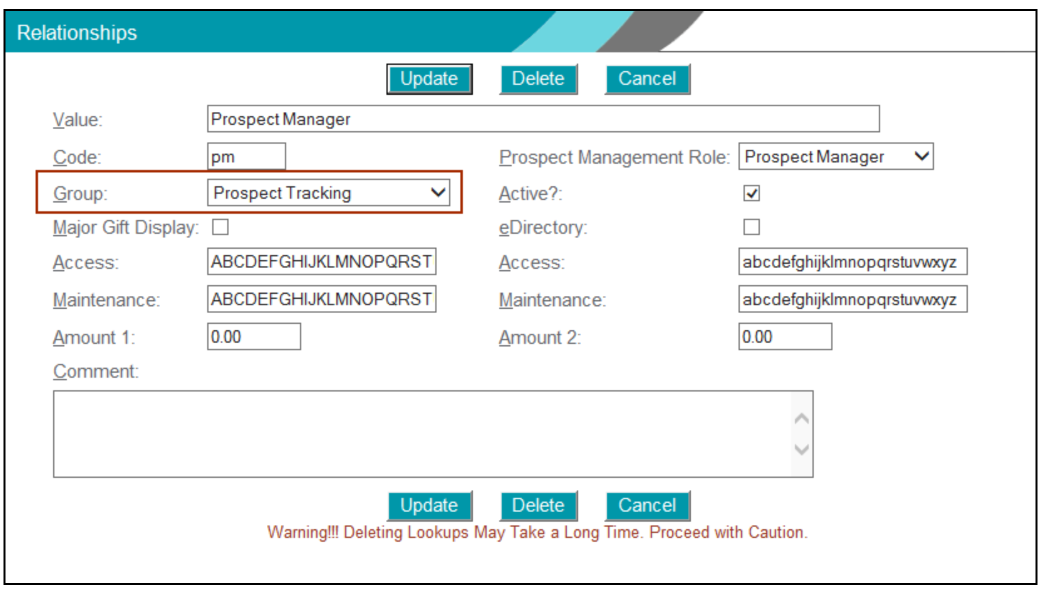
The **Is A** and the **Whose** relationship type values are controlled by the **relationships** lookup table.

Group Information

Entering relationship types into the lookup table with **Group** information insures that relationships on the **Relations & Circles** page can be meaningfully grouped, sorted, and filtered. Some examples of groups to assign to relationship types are Family, Employment, Business and Professional, and Prospect Tracking.

Example:

This example highlights the **Group** field on a relationships lookup table data update form:



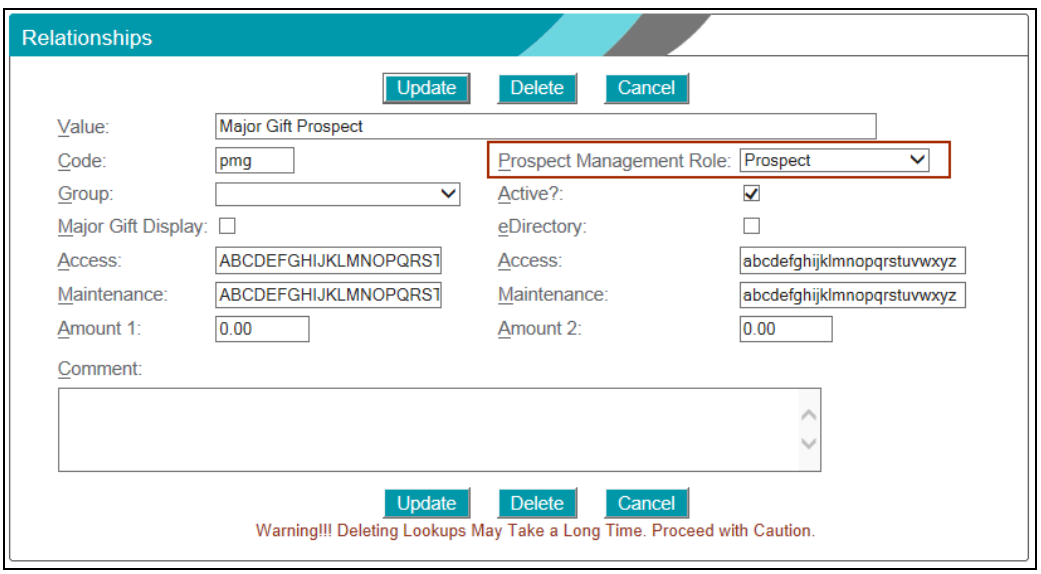
Prospect Management Role Information

In Millennium Drive, the **Is A** and **Whose** relationship type **Prospect Management Role** field is used to determine if the constituent is a user's prospect. A constituent is a prospect if he or she has a relationship with the user, where the **Is A** relationship type for the constituent has a **Prospect Management Role** of Prospect.

The **Prospect Management Role** field is also used to determine who are a constituent's prospect managers. A user is a prospect manager for a constituent if the constituent has a relationship with the user where the **Whose** relationship type for the constituent has a **Prospect Management Role** of Prospect Manager. Note that a constituent can have multiple prospect managers.

Example:

This example highlights the **Prospect Management Role** field on a relationships update form. If a relationship is created between a constituent and the user where the constituent's **Is A** is equal to Major Gift Prospect, then the constituent will be one of the user's active prospects (if the relationship **End** date is blank or in the future).



Relationships on the Relations & Circles Page

On the **Relations & Circles** page, relationships are grouped and sorted by the **Is A Group** (relisagrp) assignment. If an **Is A** relationship type has not been assigned to an **Is A Group**, then relationships with that type will be placed at the beginning of the display. The relationships can also be filtered by this **Is A Group** assignment.

● indicates that a relationship is active and ○ indicates that a relationship is inactive. The user can apply the **Active | Inactive** filter to show only active or only inactive relationships.

In a constituent relationship, tapping or clicking the related constituent's name will make that constituent the next selected constituent.

Relationships on the Proposals Page

On the **Proposals** page, the active constituent and non-constituent relationships that link to a proposal or planned gift will display after the proposal and planned gift details. In a constituent relationship, tapping or clicking the related constituent's name will make that constituent the next selected constituent.

Relationships on the Constituents Summary Page

Prospect managers for a constituent are listed in the **Details** section on the **Summary** page. On the standard layout, a manager is listed if the following conditions are met:

- The relationship is a constituent relationship.
- The prospect manager has a preferred name.
- On the constituent's side of the relationship, the **Whose** relationship type has a **Prospect Management Role** of Prospect Manager (in the lookup table).
- The relationship is active.

Note: The **Summary** page can be customized so that different relationships will show in the **Details** section, or to remove the prospect managers list from the page.

Summaries

Giving information on the standard layout for the **Constituents** view **Summary** page are records from the Millennium **Summaries** (**memories**) data table. Summary records display on the standard layout if they have the following **Name** codes (from the **memory_names** lookup table):

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

Note: If your organization wants to display different summary records, the **Summary** page can be customized to do so.

There are three standard numeric **Summary** utility definitions used to create the abila1, abila3, and abila4 summary records:

- Largest Gift Abila3
- Total Giving Abila1
- Total Giving Year to Date Abila4

These definitions can be modified to reflect your organization's business needs. However, the memory name for each definition must remain abila1, abila3, or abila4.

There is also a standard **Years** utility definition to use to create abila2 Consecutive Years Giving summary records. If a **Years** utility definition is already defined at your organization, Community Brands will not overwrite it! But, Consecutive Years Giving will only display on the **Summary** page if either the existing **Years** utility definition is edited to point **Consecutive Years** to the abila2 memory name, or the **Summary** page is customized to display your organization's existing Consecutive Years Giving summary records.

Four standard reports in the Millennium **Financial Reports** library run the **Summaries** or the **Years** utility to create the abila1, abila2, abila3, and abila4 summary records:

- Total Giving Abila1
- Consecutive Years Giving Abila2
- Largest Gift Abila3
- Total Giving Year to Date Abila4

These standard reports can be modified to change the constituent selection and the Totals criteria to reflect your organization's business needs.

When Millennium is installed, the standard Name codes (in the memory_names lookup table), Summary and Years utility definitions, and the four reports in the Financial Reports library will be added to the Millennium system. To insure that the **Summary** page for a constituent will include giving information "out of the box", perform the following tasks after installing Millennium Drive:

1. At the Web Server (IIS) computer, launch the **Assign Summaries** utility (**X:\inetpub\wwwroot\mill\tools\AssignSummaryDefinition.exe**) and the **Set Years Parameters**

utility (**X:\inetpub\wwwroot\mill\tools\SetYearsParameters.exe**) to review the abila1, abila2, abila3, abila4 standard Summary and Years utility definitions. Edit as necessary.

2. Sign in to Millennium to review the constituent selection and Totals criteria for each of the standard abila financial reports. Edit as necessary.

3. Run the standard financial reports to create the abila1, abila2, abila3, and abila4 summary records.

Tasks and Actions

Tasks data is shown on several Millennium Drive pages. Most pages contain the following information:

- task start day and time
- for tasks linked to actions, the name of the target of the task
- the task type
- the subject
- location

On the Dashboard landing page and on the Tasks page, upcoming tasks are grouped by the task start date, and may display a ! priority indicator to show that they have a High priority. Filters can be applied so that only high priority tasks are shown.

Tasks data

Tasks data displays in the following places:

- The **Tasks** section on the **Dashboard** landing page
- The **Dashboard Tasks** page
- The **Constituents Touch Points** page

The following sections describe the data available for tasks.

Dates

Start dates and times are important! In the **Tasks** section on the **Dashboard** landing page, and on the **Tasks** page, upcoming tasks are grouped by start date and time. Tasks can be overdue, due today, due this week, due next week, or due in the future.

Start dates and times are needed in order to properly place tasks on the calendar views. Start dates and times are also used to properly place tasks on the Touch Points timeline and in the Touch Points list. A task's end/due date and time should be later than its start date and time.

Note that all-day tasks are considered to have a start time of 12:00am on the date specified, and an end time of 12:00am the following day.

Task Priority

Task Priority is controlled by the **priority** lookup table. To use the Millennium Drive **Priority** task filter and see the high priority indicator, then use the standard Millennium priority table **Code** for High, which is '**2**', for high priority tasks.

Linking new Tasks to existing actions

New tasks can be added and linked to existing, *incomplete*, actions. When linking new tasks to existing actions, verify in Millennium that those actions still have blank (or null) **Completed On** dates.

Note: The system automatically populates a linked action's **Completed On** date when the last task linked to it is marked as complete! This system behavior will occur when a task is marked complete in Millennium or in Millennium Drive.

Tasks on the Touch Points page

The system determines what tasks to display on the **Touch Points** timeline and in the **Touch Points** list based on the value of the **Major Gift Display** field in the **Task Types** (**tasks_type**) lookup table. A task displays only if the **Major Gift Display** field for the **Task Type** is set to 'Y'.

Placement on the **Touch Points** timeline and in the **Touch Points** list is determined by both the **Start** and **End/Due** dates. If a task takes place over multiple days, the tick on the timeline will span those multiple days.

For tasks that do not have both a **Start Date** and an **End/Due Date**, then the **Completed Date** determines placement. If the task does not have a **Completed Date**, then only the **End/Due Date** determines placement. If a task does not have an **End/Due Date**, then only the **Start Date** determines placement. If a task has no **Start Date**, and no **End/Due Date**, and no **Completed Date**, then the date that the task was created in the database will determine placement.

A task in the **Touch Points** list can expand to show details about the actions that are linked to it.

Actions data

A constituent's actions also display on the **Touch Points** page. The system determines what actions to display based on the value of the **Major Gift Display** field in the **Action Type** (**action_type**)lookup table. An action displays only if the **Major Gift Display** field for the **Action Type** is set to 'Y'.

Placement on the **Touch Points** timeline and in the **Touch Points** list is determined by the **Completed On** date or the **Due On** date. If an action is marked as complete, then the **Completed On** date determines placemen. If an action is still in progress, then the **Due On** date determines placement. If an action has no **Completed On** date and has no **Due On** date, then the date that the action was created in the database determines placement

An action in the **Touch Points** list can expand to show details about all of the tasks that are linked to it.

Chapter 5: Procedures

The following procedures provide instructions for performing tasks in Millennium Drive, for configuring Millennium data for optimal display in Millennium Drive, and for configuring Millennium system options that are used by Millennium Drive.

Millennium Drive Tasks

- Entering Data in Insert and Update Forms
- Searching for a Constituent
- Refreshing Constituent Data
- Adding a Task
- Editing a Task
- Adding a Planned Gift
- Adding a Proposal
- Editing Planned Giving and Proposals
- Applying a Date Filter to Touch Points
- Applying a Touch Points Type Filter
- Viewing Upcoming Tasks on the Touch Points Page

Configuring Millennium Data and System Options

- Display Actions on the Touch Points Page
- Display Attributes on the Touch Points Page
- Display Correspondence on the Touch Points Page
- Display Events on the Touch Points Page
- Display Giving on the Touch Points Page
- Display Tasks on the Touch Points Page

- Publishing Reports for Millennium Drive
- Setting the Home Institution

Entering Data in Insert and Update Forms

When entering data on insert and update forms in Millennium Drive, it is important to remember the following:

- In most of the fields, it is necessary to tap or click ***in*** the field before information can be entered or changed.
- Some fields list the available values from which the user can choose. Tap or click in the field and then select the correct choice.
- denotes a date field. Tap or click in the date field, and then enter a date or select a date from the calendar.
- denotes a time field. Tap or click in the time field, and then enter a time. It is not necessary to add AM/PM. Hours between 7 and 11 default to AM. Hours between 12 and 6 default to PM.
- Add or change information in free-text fields by tapping or clicking in the field and then entering the information.
- A check box denotes a flag field. Select the check box to set the field value to **Yes** or **On**, or to activate additional form functionality. Clear the check box to set the field value to **No** or **Off**, or to deactivate additional form functionality.

Searching for a Constituent

To locate a constituent in Millennium Drive:

1. On a mobile device, the user might need to tap or click on the Search button to display the search box.
2. Enter the ID number or the email address, or one or more letters from the name into the search box.
   - Wild cards (_ and %) are supported when searching by email address or by name. Wild cards are not supported when searching by ID number.
   - The user can format a name search in the same way as it is formatted in Millennium (Last Name\First Name<space>Middle), but it is not necessary.

- If the user uses 'free formatting' and includes more than one name term, he or she must enter a space between each name term. For example: enter Jeff Shure, not JeffShure.

3. Tap or click the Search button .

4. If more than one name matches the search criteria, a list of matching names will be displayed. (Deceased constituents -- or Disbanded, in the case of organizations -- will display with the symbol " (D)" after the name.) Select the correct constituent from the search results list.

   If more than 20 matches are found, the user might need to click on the **Show More** link in the search results list to locate the correct name.

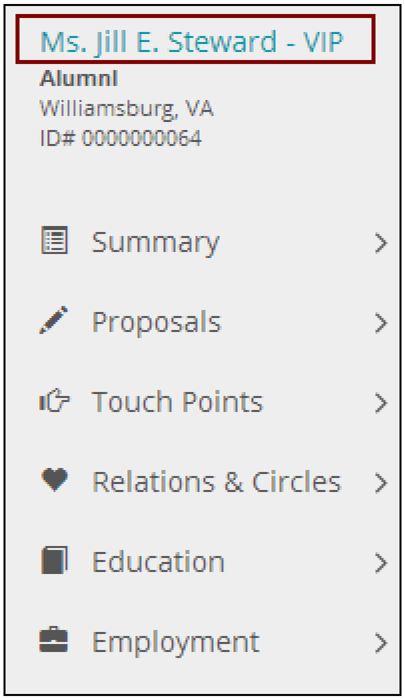
5. To view the timeline, click the arrow in the **Charts** section.

Note: When performing a constituent search from a page in either the **Dashboard** view or **Reports** view, Millennium Drive will switch to the **Constituents** view and display the constituent's **Summary** page.

Refreshing Constituent Data

In the Millennium Drive **Constituents** view, the name, photo, title bar, constituent type, city and state, and ID number for the currently selected constituent display above the navigation menu.

When viewing constituent data on any one of the pages (**Summary**, **Proposals**, **Touch Points**, **Giving**, **Relations & Circles**, **Education**, or **Employment**), click on the constituent's name to refresh the view.



Adding a Task

✓ Review the Searching for a Constituent and the Entering Data in Insert and Update Forms procedures in this chapter before you begin.

To add a new task in Millennium Drive:

1. It the task will be linked to an action, use the **Search Constituents** feature to locate a constituent for the action (the 'target' of the new task).
2. Navigate to the **Tasks** section on the **Dashboard** landing page or to the **Tasks** page.
3. Tap or click **Add** to open the **Insert Task** form.
4. In the Action For field, accept the default constituent (from the current search), or search for another constituent to associate with the task. You can also enter a few characters and click the Search icon ( ) to search for another constituent.
5. **To link the task to an existing action**, choose the action from the **Actions** list box.

   Note: If the action that is not listed, sign in to Millennium to verify that it is has not been marked complete.
6. **To link the task to a new action**, tap or click the **Add Action** button.

7. Complete the **Add Action** section of the form.

   Note: Select the **Link to spouse** check box to tell the system to also create a new identical linked action record for the constituent's spouse. This check box is only visible if the constituent has a spouse relationship in Millennium.

8. **If the task is not linked to an action**, then do not complete **Step 5** or **Step 6**.

9. The **Assigned To** field is a **Constituent Search** feature. The **Assigned To** name defaults to the constituent who is associated with the user name, but the task can be assigned to another constituent. To assign the task to another constituent, enter the search criteria in the box and click to locate him or her.

10. Complete the rest of the Tasks section of the form as wanted.

    Notes:
    - Select the **Complete** check box to mark both the task *and the action that it is linked to* as complete. If the **Complete** check box is selected, the **Completed date** field displays, and the value defaults to today's date. Edit the date if necessary.
    - If one of the predefined **Duration** time spans (such as 1 hour) is selected, the system will automatically set the **End** date and **End** time to match the selection.
    - If one of the predefined **Reminder** time spans (such as 30 minutes) is selected, the system will automatically set the **Remind** date and **Remind** time to match the selection.

11. Tap or click **Save**. The system will add the new task (and the new action if the task was linked to a new action) in Millennium, and close the form.

Editing a Task

✓ Review the Entering Data in Insert and Update Forms procedure in this chapter before you begin.

To edit a Task in Millennium Drive:

1. To edit an upcoming task, navigate to either in the **Tasks** section on the **Dashboard** landing page or to the **Tasks** page.
2. To edit a task that has been marked complete, navigate to the **Tasks** page (only) and click **Completed**.
3. Locate the task in the list.
4. Click the **Edit** link to open the **Edit Task** form.

5. Make the necessary changes.

Notes:

- Select the **Complete** check box to mark the task *and the action that it is linked to* as complete. If the **Complete** check box is selected, the **Completed date** field displays, and the value defaults to today's date. Edit the date if necessary.
- If the **Duration** is set to a predefined time span (such as 1 hour), then the **End** date and time fields have been set to match the predefined time span, and they not shown on the form. When a **Duration** of Other is selected, the **End** date and time fields display so that they can be edited.
- If **Reminder** is set to a predefined time span (such as 30 minutes), then the **Remind** date and time fields have been set to match the predefined time span, and they are not shown on the form. When a **Reminder** of Other is selected, the **Remind** date and time fields display so that they can be edited.

6. Tap or click **Save** to save the changes and close the form.

Note: The **Action**, **Action For** and **Assigned To** fields can not be changed on the Edit Task form.

Adding a Planned Gift

To add a Planned Gift for a constituent, use the following steps:

1. Go to **Constituents>Proposals.**
2. Click the **Add** button in the **Planned Gift** section. The Insert Planned Gift form opens.
3. Enter the information in the fields as needed.
4. Click **Save** to save the planned gift.

Adding a Proposal

To add a Proposal for a constituent, use the following steps:

1. Go to **Constituents>Proposals.**
2. Click the **Add** button in the **Proposals** section. The Add Proposal form opens.
3. Enter the information in the fields as needed.
4. Click **Save** to save the proposal.

Editing a Planned Gift or Proposal

Use the **Edit** button next to a planned gift or proposal entry to open the edit form for the record. You can update the information in the form and save it.

To edit a Planned Gift for a constituent, use the following steps:

1. Go to **Constituents>Proposals.**
2. Click the **Edit** button next to the **Planned Gift** you want to update. The Edit Planned Gift form opens.
3. Edit the information in the fields as needed.
4. Click **Save** to save the planned gift.

To edit a Proposal for a constituent, use the following steps:

1. Go to **Constituents>Proposals.**
2. Click the **Edit** button next to the **Proposal** you want to update. The Edit Proposal form opens.
3. Edit the information in the form as needed.
4. Click **Save** to save the proposal.

Applying a Date Filter to Touch Points

Use the date range buttons to filter the timeline and the list by a predefined or a custom date range. The following date range filters are available: Lifetime, 1 month, 1 year, 18 months, 3 years, 5 years, and Custom. The starting date for the Lifetime filter is the date of the constituent's first interaction with the organization.

1. To filter the timeline and list by a custom date range:
   a. Tap or click **Custom**.
   b. Tap or click in the start date field and then enter a date or select a date from the calendar.
   c. Tap or click in the end date field and then enter a date or select a date from the calendar.
2. To view touches for one day only, use the **Custom** filter, and select or enter the same date in both the start and the end date fields.

3. To view only future touches, use the **Custom** filter, and select or enter future dates in both the start and the end date fields.

4. To view the timeline, click the arrow in the **Charts** section.

Note:

Touches are placed on the **Touch Points** timeline and in the **Touch Points** list based on dates. The following chart shows what dates are used to place touches on the timeline and in the list.

Touch Type	Date Field(s)
Actions	Completed Date
Attributes	Start Date
Correspondence	Response Date (Sent Date will be used if the Response Date is earlier than the Sent Date)
Events	Both Start Date and End Date
Giving	Effective Date
Tasks	Both Start Date and Due Date

If a date is missing from a touch record, the system does consider other dates in the record when placing it on the timeline and in the list. For details about the other dates that are considered, review the *Attributes Data*, *Correspondence Data*, *Events Data*, *Giving Data*, and *Tasks and Actions Data* sections in the Data in Millennium Drive chapter in this guide.

Applying a Touch Points Type Filter

Use the Touch Points type filters to limit which touches are shown in the Touch Points timeline and Touch Points list.

Type filter buttons are toggles. If a button is blue, tap or click on it to remove that type of touch from the timeline and the list. If a button is gray, then tap or click on it to add that touch type to the timeline and the list.

In this example, no type filters are applied. This means that all touches that meet the date range filter criteria will be shown:

In this example, only Giving that meet the date range filter criteria will be shown:

To show only one type of touch for a constituent (for example, show only Giving):

1. Tap or click the **All** filter until it is gray. This clears all touch points from the timeline and list.
2. Tap or click the **Giving** filter to show gifts. The filter button is blue when it is selected.
3. Tap or click a date range filter to specify the gifts to show in the timeline and list.

To view the timeline, click the arrow in the **Charts** section.

Note: The filters shown reflect the available data in Millennium. If a table has been removed in the Millennium **Table Options**, the filter for the data in that table will not appear in the Touch Points page.

Viewing Upcoming Tasks on the Touch Points Page

✓ Review the Search Constituents, Applying a Date Filter to Touch Points, and Applying a Type Filter to Touch Points procedures in this chapter before you begin.

Follow this procedure to view upcoming tasks that are not overdue. Overdue tasks can be viewed in the **Tasks** section on the **Dashboard View** landing page.

To view upcoming tasks on the Touch Points page:

1. Use the **Search Constituents** feature to locate the constituent who is linked to the user's Millennium user name.
2. Click the **Constituents** tab in the header, and click the **Touch Points** navigation menu item.
3. Apply the **Tasks** filter only to the Touch Points timeline and list.
4. Click the **Custom** date filter button.
5. Enter or select start and end dates that are either Today, or in the future.
6. To view the timeline, click the arrow in the **Charts** section.

Tip: Expand a task in the **Touch Points** list to see details about the actions that are linked to it.

Display Actions on the Touch Points Page

This procedure is performed in Millennium.

The value of a **Major Gift Display** field in lookup tables determines what data records to display on the **Touch Points** timeline and in the **Touch Points** list (except for Events). An action displays on **Touch Points** only if the **Major Gift Display** field for the **Action Type** is set to 'Y'

1. Determine what action types to display on the **Touch Points** page.
2. Sign in to Millennium as a user with permissions to the lookup tables.
3. Access the Action Type lookup table by using Millennium Explorer, **Tools > Profile Lookups > Lookup Tables**, and select **Action Type** from the list of lookup tables.
4. For each type of action that will be displayed on the **Touch Points** page:
   a. Point to the **Edit** button to the left of the name and click **Update/Delete**.
   b. Select the **Major Gift Display** check box.
   c. Click **Update**.
5. To view the timeline, click the arrow in the **Charts** section.

Note: Select the **Major Gift Display** check box on the insert form when inserting a new Action Type lookup table entry so that the actions that are assigned to the new type will display on the **Touch Points** page.

Display Attributes on the Touch Points Page

This procedure is performed in Millennium.

The value of a **Major Gift Display** field in lookup tables determines what data records to display on the **Touch Points** timeline and in the **Touch Points** list (except for Events). An attribute displays on the **Touch Points** page only if the **Major Gift Display** field for the **Attribute Type** is set to 'Y'

1. Determine what attributes to display on the **Touch Points** page.
2. Sign in to Millennium as a user with permissions to the lookup tables.
3. Access the Attribute Types lookup table by using Millennium Explorer, **Tools > Profile Lookups > Lookup Tables**, and select **Attribute Types** from the list of lookup tables.
4. For each type of attribute that will be displayed on the **Touch Points** page:
   a. On the **Attribute Types Options** form, enter the **Code** or **Value** (into the relevant box) for the **Attribute Type**.

b. Click **OK**.

c. Point to the **Edit** button and click **Update/Delete**.

d. Select the **Major Gift Display** check box.

e. Click **Update**.

5. To view the timeline, click the arrow in the **Charts** section.

Note: Select the **Major Gift Display** check box on the insert form when inserting a new Attribute Type lookup table entry so that the attributes that are assigned to the new type will display on the **Touch Points** page.

Display Correspondence on the Touch Points Page

This procedure is performed in Millennium.

The value of a **Major Gift Display** field in lookup tables determines what data records to display on the **Touch Points** timeline and in the **Touch Points** list (except for Events).

A correspondence record displays on **Touch Points** only if the **Major Gift Display** field for *both* the **Correspondence Name** and the **Correspondence Type** are set to 'Y'.

Use the following chart to understand how the system will determine when to place a correspondence record on the **Touch Points** page.

Major Gift Display field for Correspondence Type	Major Gift Display field for Correspondence Name	Show record on Touch Points?
Y	Y	Yes
Y	N	No
N	Y	No
N	N	No

1. Determine what correspondence names and what correspondence types to display on the **Touch Points** page.

2. Sign in to Millennium as a user with permissions to the lookup tables.

3. Access the Correspondence Name lookup table by using Millennium Explorer, **Tools > Profile Lookups > Lookup Tables**, and select **Correspondence Name** from the list of lookup tables.

4. For each correspondence name that will be displayed on the **Touch Points** page:

   a. Point to the **Edit** button to the left of the name and click **Update/Delete**.

   b. Select the **Major Gift Display** check box.

   c. Click **Update**.

5. Return to the list of lookup tables and select **Correspondence Type** from the list.

6. Complete **Step 4** for each correspondence type that will be displayed on the **Touch Points** page.

Notes:

- Select the **Major Gift Display** check box on the insert form when inserting a new Correspondence Name lookup table entry so that the correspondence records that are assigned to the new name will display on the **Touch Points** page.
- Select the **Major Gift Display** check box on the insert form when inserting a new Correspondence Type lookup table entry so that the correspondence records that are assigned to the new type will display on the **Touch Points** page.
- To view the timeline, click the arrow in the **Charts** section.

Display Events on the Touch Points Page

This procedure is performed in Millennium.

Events information displays on **Touch Points** only if the constituent has at least one activity attendance record for the event.

To display a constituent's participation in an event on the **Touch Points** page, assign at least one of the event's activities to the constituent. Do this when adding the constituent as an event guest during the Express Registration process, or after the constituent has been already been registered to attend the event.

Display Giving on the Touch Points Page

This procedure is performed in Millennium.

The value of a **Major Gift Display** field in lookup tables determines what data records to display on the **Touch Points** timeline and in the **Touch Points** list (except for Events). A gift displays on **Touch Points** only if the **Major Gift Display** field for the **Gift Type** is set to 'Y'

1. Determine what gift types to display on the **Touch Points** page.
2. Sign in to Millennium as a user with permissions to the lookup tables.
3. Access the Gift Types lookup table by using Millennium Explorer, **Tools > Profile Lookups > Lookup Tables**, and select **Gift Types** from the list of lookup tables.
4. For each type of gift that will be displayed on the **Touch Points** page:
   a. Point to the **Edit** button to the left of the name and click **Update/Delete**.
   b. Select the **Major Gift Display** check box.
   c. Click **Update**.

Tip: To view the timeline, click the arrow in the **Charts** section.

Display Tasks on the Touch Points Page

This procedure is performed in Millennium.

The value of a **Major Gift Display** field in lookup tables determines what data records to display on the **Touch Points** timeline and in the **Touch Points** list (except for Events). A task displays on **Touch Points** only if the **Major Gift Display** field for the **Tasks Type** is set to 'Y'

1. Determine what task types to display on the **Touch Points** page.
2. Sign in to Millennium as a user with permissions to the lookup tables.
3. Access the Tasks Type lookup table by using Millennium Explorer, **Tools > Profile Lookups > Lookup Tables**, and select **Tasks Type** from the list of lookup tables.
4. For each type of task that will be displayed on the **Touch Points** page:
   a. Point to the **Edit** button to the left of the name and click **Update/Delete**.
   b. Select the **Major Gift Display** check box.
   c. Click **Update**.

Note: Select the **Major Gift Display** check box on the insert form when inserting a new Tasks Type lookup table entry so that the tasks that are assigned to the new type will display on the **Touch Points** page.

Publishing Reports for Millennium Drive

This procedure is performed in Millennium.

Any standard or custom Millennium report can be published for viewing through Millennium Drive. On a mobile device or small tablet, large reports that require horizontal scrolling or extensive vertical scrolling may not be ideal for viewing in Millennium Drive.

1. The Millennium system administrator or database administrator must verify that the users who will view reports in Millennium Drive have security rights to the **Drive** report group(s).
2. When running a report, save the report results into a **Drive** report group, in any one of the report libraries.
3. Set the report destination to either **HTML** or **PDF**.
4. To read a PDF report, a PDF viewer must be installed on the device or workstation computer.

Note: The **Drive** report group is a required entry in the Report Groups (**report_groups**) lookup table. Organizations can enter additional **Drive** report group entries by using a code that begins with driv (driv2 for example). If users have the security rights, reports that are saved into any **Drive** report group can be viewed in Millennium Drive.

Setting the Home Institution

This procedure is performed in Millennium.

To designate an institution as the home institution at your organization:

1. Sign in to Millennium as a Millennium system administrator or the database administrator.
2. Access the **System Options** page by using Millennium Explorer, **Tools > System Upkeep > System Options**.
3. Click the **Maintenance** button located below and to the left of the **System Options** header to access the **System Settings** form.
4. In the **Institution** box, enter the value or code for your organization, and click .
5. If the value or code matches more than one active entry in the **Institutions** lookup table, select the correct one from the list. If the value or code does not match any active entry, then click to retry the search.
6. When the correct institution displays in the **Institution** box, click **OK**.

Chapter 6: Documentation Resources

In addition to this user's guide, the following resources are available for Millennium Drive users, Millennium system administrators, and the database administrator.

FAQs - Within the Millennium Drive application, the **Help** link located in the header accesses frequently asked questions and concerns about Millennium Drive.

Millennium Help Site - Visit the Millennium help site at https://documentation.mip.com/Millennium/Default.htm.

Millennium Drive Installation Guide - instructions for installing and configuring Millennium Drive to work with Millennium. Download this guide at https://kb.communitybrands.com *(KB article #30216)*.

Configurable Pages Administrator's Guide - Certain pages in Millennium Drive are *configurable*, i.e., individual organizations can customize them to a limited extent to meet their specific business needs. Configuring these pages is highly complex, and is classified as an advanced system or database administrator task. The *Configurable Pages Administrators Guide* contains a list of which pages can be configured, and detailed instructions for doing so. Download this guide at https://kb.communitybrands.com (*KB article #30216*).

Application Settings Administrator's Guide - provides details about the editable application and log settings in the Millennium Drive **Web.config** file. Community Brands recommends that you do not change the settings in the **Web.config** file unless you are advised to do so by Customer Support or unless you are customizing the data source details and layout for the **Constituents Summary** page. Download this guide at https://kb.communitybrands.com (*KB article #30216*).

Chapter 7: System Administration

This chapter is geared to the database administrator, network administrators, and Millennium system administrators.

Overview

Configurable Pages Overview

Most pages of the Millennium Drive application have a fixed design: they appear and behave in the same manner for all client organizations. There are, however, a several pages that can be customized to suit your organization's specific needs:

"Constituent Summary Page" (page 55)–customize the data that displays in the Constituent summary.

"Constituent Giving Page" (page 52)–customize the data that displays on the Giving page.

"Insert Task Form" (page 57)–customize the fields that are included when a new task is inserted.

"Edit Task Form" (page 59)–customize the fields that are shown and editable when a task is edited.

Add Action Form–customize the fields that are shown and editable when an action is added.

Insert Task Form–customize the fields that are included when a new planned gift is inserted.

Insert Planned Gift Form–customize the fields that are shown and editable when a planned gift is edited.

Insert Planned Gift Form–customize the fields that are included when a new proposal is inserted.

Edit Proposal Form–customize the fields that are shown and editable when a proposal is edited.

Important! Changes you make to configurable pages affect all users of the Millennium organization. In addition, if you choose to configure one page, the system requires a configured version of all configurable pages.

When you configure these pages, you can specify the data included in the page (choosing from existing data objects) and the page layout.

Note: For Millennium Drive version 2014.1 and later, customizing configurable pages is performed outside of Millennium or Millennium Drive. This task must be performed by a system or database administrator.

Configurable Drive Pages

There are several steps to modify a configurable Drive page:

- **Modify the Drive-specific database views**. The data for each configurable page is drawn from a predefined set of data objects associated with that page. These data objects are constructed using a

- combination of the standard Millennium database views and a set of specialized database views used only by Millennium Drive. Although you cannot directly modify these data objects, you can customize their content to a certain extent by creating organization-specific versions of the Drive database views. *You can only have one customized set of database views, and it must be used either by all configurable pages, or by none of them.* Details on how to create customized database views can be found in "Configuring Page Data" (page 47)
- **Modify the layout file for the page to be configured.** The layout of each configurable page is controlled by its own specialized HTML file, located in the Millennium Drive **custom\layouts** folder. You can customize the layout of any configurable page for your organization by creating a tailored version of the corresponding HTML layout file and then configuring Millennium Drive to use it. Details on how to create customized layout files can be found in "Configuring Page Layouts" (page 49).
- Configure Millennium Drive to use the modified database views and page layouts. This step makes the configured pages available to Millennium Drive users. For more information see "Managing Updates to Millennium Drive" (page 62).

Configuring Page Data

Each configurable page draws data from a fixed set of predefined data objects. These objects are constructed using data from the standard Millennium database views and an additional set of database views used exclusively by Drive configurable pages. The objects themselves cannot be edited; however, their contents can be customized indirectly to a certain extent by creating a modified version of this second set of views. Use the information in the following sections to create these customized views and configure Millennium Drive to use them.

Drive Database Views for Configurable Pages

> **Important!** Even if your organization does not intend to use the default Drive database views, ***you should never modify them directly!*** Instead, copy the original views, modify the copies, and point Drive to the modified views.

Complete the following steps to create and use custom views for your configurable pages:

1. Download the view generator script provided by Community Brands.
    a. Go to https://kb.communitybrands.com 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 Millennium Drive. These differences are noted in the KB article. After you complete **Step 4**, you can sign in to Millennium Drive to see the differences. You can edit the sample scripts or the views that they generate to remove these differences.

2. At the Web Server (IIS), 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="UseCustomViews" value="false" />** setting. Set value="true".

   If this setting is not present, then add <add key="UseCustomViews" value="true" /> to the **<appSettings>** section.

4. Save the changes to **Web.config**.

   Note: After you edit and save the **Web.config** file, you must restart IIS, refresh the browser window, and log in again to see the changes.

5. Use a database query tool to create identical copies of ***all*** views in the Millennium database. You can use the script provided by Community Brands or create your own views that are identical to the standard views in terms of physical structure. ***If you create your own views, be sure to use the same names used by the Community Brands script for the new views***. The correct names for the custom views are listed in Rules for Creating Custom Views, below.

6. Modify one or more of the **mgox_** views to meet your needs. If the view is used by more than one configurable page, be careful to ensure that your customizations apply correctly to all relevant pages! To ensure that the modified views work seamlessly with Drive, be careful to observe the rules listed in the following section, Rules for Creating Custom Views.

7. Once you are satisfied with your modifications, back up the customized views to a safe location.

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

Rules for Creating Custom Views

When you modify your custom views, you must follow certain rules and conventions; otherwise your customizations will not work correctly:

1. The column names, column order, data types, and column lengths in the custom views must exactly match those in the standard views.

2. You must create a parallel custom view for every standard view even if you are going to modify only one or two. All the configurable pages for your organization (whether their layouts are customized or not) will use either all of the standard views or all of the custom views.

3. 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
mgo_inserttask	mgox_inserttask
mgo_edittask	mgox_edittask

Examples of view customizations:

- Adding a WHERE clause to the **mgox_attribute** view to filter the attributes that display on a customizable page.
- Populating the custom fields in the **mgox_summary** view with relevant data from other linked tables (including tables external to Millennium).
- Pulling calculated data into the **mgox_givingsum** view from sources other than the Millennium Summaries (**memories**) data table.

Configuring Page Layouts

This chapter gives a general discussion of the layout files for Drive configurable pages, and provides step-by-step instructions for customizing layout files to control the way data and sections are arranged on these pages.

For each configurable page, the standard layout is controlled by an HTML file located in the relevant **custom\layouts** subfolder of the Millennium Drive directory. A layout file programmatically defines the labels, data, and sections to appear on the corresponding page. It is maintained by Community Brands and might be modified or replaced in future updates to Millennium Drive. ***Your organization should not modify any standard HTML layout file***.

The technical details of the specific layout pages currently supported by Community Brands can be found in configurable pages.

Configuring a Page Layout

To customize the layout for a configurable page, you will begin by creating a parallel HTML layout file in the custom\layouts subfolder, based on the standard one, and then customize the new file. The required name of the custom HTML file for each configurable view is listed in Configurable Pages.

Reminder: Do not modify the standard HTML layout file! Community Brands provides a sample customized HTML layout 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 a configurable page:

1. Download and install the appropriate sample HTML layout file provided by Community Brands.
   a. Go to https://kb.communitybrands.com and sign in to the Knowledgebase.
   b. Locate *KB article #10716 - Millennium Drive resources for Administrators* and download the appropriate "-x.html" file into the custom\layouts subfolder of the Millennium Drive directory on the Web Server (IIS) computer. The default location for the directory is **\inetpub\MillMGO**.

Note: Edit the sample file to control the page layout, or use it for a reference as you create your own customized HTML layout file. There may be minor differences between the page layout that the sample customized file produces, and the layout that the standard page layout file produces. These differences will be noted in the KB article, and once you complete **Step 4**, you can sign in to Millennium Drive (or refresh the affected page if you are currently viewing it) to see the differences. If necessary, you can edit the customized 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 of this file is **\inetpub\MillMGO**.

3. Locate the **<appSettings>** section and locate the setting **<add key="UseCustomLayout<page_indicator>" value="false" />**, where <page_indicator> describes the page you are customizing. (See Appendix **A** - Millennium Drive Configurable Pages for the specific setting value for your page.) Set value="true".

   If this setting is not present, then add <add key="UseCustomLayout<page_indicator>" value="true" /> to the **<appSettings>** section.

4. Save the changes to **Web.config**.

   Note: After you edit and save the **Web.config** file, you must restart IIS, refresh the browser window, and log in again to see the changes.

5. Modify the custom ("-x") layout file to meet your needs.

6. Once you are satisfied with your modifications, save the changes and back up the new customized layout file to a safe location.

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

Returning to the Standard Page Layout

To return to the default layout for a customized page, complete the following steps:

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="UseCustomLayout<page_indicator>" value="true" />** setting. Set value="false".

3. Save the changes to **Web.config**.

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

Constituent Giving Page

The Millennium Drive **Constituent Giving** page shows a summary of a constituent's giving activity.

The standard Giving page includes the data compiled for each constituent, as defined in the Giving Summary database view:

- Total Giving
- Consecutive Years Giving
- Total Giving Year-to-Date
- Largest Gift

Additional data will be compiled if your organization has defined custom giving codes in the Giving Summary database view.

Page Information

Category	Item	More Information
Data Source	mgo_givingsum database view	See "Giving Summary View" (page BZ) for more information.
Layout File Name	\inetpub\MillMGO\custom\layouts\giving-x.html	If you set the configurable pages setting to `true` in **Web.config** and do not have an appropriate layout file for the Constituent Giving page, an error will be displayed whenever a user tries to load the Constituent Giving page. See the following section for more information about configuring the page layout.

Configuring the Data and Page Layout for the Constituent Giving Page

Use the following steps to configure the page layout and data displayed on the the Constituent Giving page:

1. Open the giving-x.html file in your preferred html editor.

   Note: To preserve the original file, make a backup copy of giving-x.html in another location before you make any changes.

2. For the Giving Summary, you can only add or delete the data objects available on the page, by changing the giving codes included in the memname field. By default, all codes are displayed if the selected constituent's giving record includes data associated with the giving code.

Object	Description
abila1	Total Giving
abila2	Consecutive Years Giving
abila3	Largest Gift
abila4	Total Giving Year to Date
abila5 to abila9	Organization-defined giving codes

3. The page layout can be modified as follows:
   a. Change the min-col-width and max-col-width settings to modify the size of the tiles displayed for each data object.
   b. Edit the empty-message element to a value that meets your site requirements. This value is displayed if no giving data is found for the selected constituent.
   c. Edit the amount field elements to change the way a currency field or a quantity field are displayed.
4. Save your changes.

Note: After you update the file, make sure you follow the steps in "Enabling and Disabling Configurable Pages " (page 61) to enable the configured page for Drive users.

Constituent Summary Page

The Millennium Drive **Constituent Summary** page gives a comprehensive view of the constituent on a single page. Information is pulled from Millennium data sources including Basic Data, Addresses, Internet Addresses, Summaries, and Attributes.

The standard Constituent Summary page includes the following sections:

- **Basic Data**–Including the constituent's name and the title bar from the constituent record.
- **Details**–Including the constituent's birthdate, age, and a list of active prospect managers.
- **Open Proposals**–Including information about open proposals and the active relationships that link to them.
- **Last Touch/Next Touch**–This section describes the constituent's most recent interaction with your organization, and the next scheduled interaction.
- **Giving**–Including the constituent's Millennium Summaries.
- **Contact Information**–Including the constituent's addresses, phone, fax, and alternate phone numbers, and web addresses.
- **Attributes**–Attributes listed by type and group .

Data Sources for the Constituent Summary Page

The following chart identifies the standard view (data source) for each section on the default 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	

Summary Page Section	Database View(s)	Notes
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 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 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 addresses and their associated phone, fax, and alternate phone numbers.
Contact Information - Phone	mgo_phone	
Contact Information - Web	mgo_internet	
Attributes	mgo_attribute	

" Database Views for Millennium Drive" (page BP) describes the standard database views in more detail and the data mappings for each of these views.

Layout Configuration

Detailed instructions for modifying the layout of any configurable Drive page can be found in Configuring Page Layouts. The specific technical details needed to adapt these instructions to the Constituent Summary page are described below.

Web.config Setting: UseCustomViews

In order to use a custom layout for the Constituent Summary page, you must set **UseCustomViews** to `true` in the **Web.config** file (located by default in **X:\inetpub\MillMGO**):

```
<add key="UseCustomViews" value="true" />
```

If there is no entry for the setting in Web.config, you must add it.

Likewise, If you need to go back to using the standard page layout, simply change the key value to "false":

```
<add key="UseCustomViews " value="false" />
```

Alternatively, you can delete the entry altogether.

Note: After you edit and save the **Web.config** file, you must restart IIS, refresh the browser window, and log in again to see the changes.

Customized Layout Filename: summary-x.html

The customized layout file for the Constituent Summary page *must be named* **summary-x.html**, and *must be located* in the **custom\layouts** folder of the Millennium Drive installation directory. If you set **UseCustomViews** to `true` and do not have an appropriate layout file named **X:\inetpub\MillMGO\custom\layouts\summary-x.html**, an error will be displayed whenever a user tries to bring up the page.

Insert Task Form

To access the **Insert Task** form, click the **Add** button from the Tasks section of the dashboard. This form can be configured for your site. For example, you might include custom fields on the form that are not included on the standard **Insert Task** form. You can also change the label for any field on the form to customize the way the form describes each field.

The standard insert Task form includes the following fields:

- Add Action button to expand the Add Action form
- Assigned To
- Type
- Priority
- Status, including a Complete flag and Completion Date
- Start and End dates
- Duration
- Reminders
- Subject

- Location
- Comment

Page Information

Category	Item	More Information
Data Source	n/a	See "Insert Task View" (page BP) for more information.
Layout File Name	\inetpub\MillMGO\custom\layouts\insertTask-x.html	If you set the configurable pages setting to `true` in **Web.config** and do not have an appropriate layout file for the Insert Task form, an error will be displayed whenever a user tries to load the form. See the following section for more information about configuring the page layout.

Configuring the Data for the Insert Task Form

Use the following steps to configure the data displayed on the Insert Task form:

1. Obtain the **insertTask-x.html** file from the Community Brands Knowledgebase (requires you to sign in).
2. Copy the file to the appropriate location in the Millennium Drive installation (**\inetpub\MillMGO\custom\layouts\insertTask-x.html**),
3. Open the **insertTask-x.html** file in your preferred html editor.

   Note: To preserve the original file, make a backup copy of **insertTask-x.html** in another location before you make any changes.

4. Edit the fields and labels as needed for your site requirements. Be sure to remove or comment out any fields you do not want to appear on the form.

5. Save your changes.

Note: After you update the file, make sure you follow the steps in "Enabling and Disabling Configurable Pages " (page 61) to enable the configured page for Drive users.

Edit Task Form

To access the **Edit Task** form, click the **Edit** link for an existing task in the Tasks section of the dashboard. This form can be configured for your site. For example, you might include custom fields on the form that are not included on the standard **Edit Task** form. You can also change the label for any field on the form to customize the way the form describes each field.

The standard Edit Task form includes the following fields:

- Action For (constituent linked to the task)
- Assigned To
- Type
- Priority
- Status, including a Complete flag and Completion Date
- Start and End dates
- Duration
- Reminders
- Subject
- Location
- Comment

Page Information

Category	Item	More Information
Data Source	n/a	See "Edit Task View" (page BV) for more information.
Layout File Name	\inetpub\MillMGO\custom\layouts\editTask-x.html	If you set the configurable pages setting to `true` in **Web.config** and do not have an appropriate layout file for the Edit Task form, an error will be displayed whenever a user tries to load the form. See the following section for more information about configuring the page layout.

Configuring the Data for the Edit Task Form

Use the following steps to configure the data displayed on the Insert Task form:

1. Obtain the **editTask-x.html** file from the Community Brands Knowledgebase (requires you to sign in).
2. Copy the file to the appropriate location in the Millennium Drive installation (**\inetpub\MillMGO\custom\layouts\editTask-x.html**),
3. Open the **editTask-x.html** file in your preferred html editor.

   Note: To preserve the original file, make a backup copy of **editTask-x.html** in another location before you make any changes.
4. Edit the fields and labels as needed for your site requirements. Be sure to remove or comment out any fields you do not want to appear on the form.
5. Save your changes.

Note: After you update the file, make sure you follow the steps in "Enabling and Disabling Configurable Pages " (page 61) to enable the configured page for Drive users.

Enabling and Disabling Configurable Pages

After you have selected database views and created page layouts for the configured pages, you must enable the configured pages in Millennium Drive. Use the following sections to enable or disable configured pages in the application.

Configuring Millennium Drive to use the Customized Views and Page Layout

By default, Millennium Drive uses the standard Drive database views and the default layout files to construct all configurable pages. You can modify this behavior by changing certain settings in the **Web.config** file.

The **Web.config** file is located in the Millennium Drive directory; its default location is **\inetpub\MillMGO**. The settings are located in the **<appSettings>** section of **Web.config**, and are independent of one another. If Drive is set to use custom database views, it will use them for all configurable pages whether or not they have custom layouts. Likewise, a given configurable page can use a custom layout whether or not custom views are being used, and regardless of whether other configurable pages are also using custom layouts.

Custom vs. Standard Views

The **"UseCustomViews"** setting in the **<appSettings>** section of the **Web.config** file controls what set of views is used. If this setting is present and set to **"true"** (syntax: **<add key="UseCustomViews" value="true" />**) , then Millennium Drive will use the custom database views to build the data objects ***for all configurable pages***. If the setting is not present, or if **value="false"**, then the system will use the standard database views for all pages.

Custom vs. Standard HTML Layout Files

For each configurable Drive page, there is a setting whose name has the structure **"UseCustomLayout*<page indicator>*** (for example, **"UseCustomLayoutGivingSummary"** for the Giving Summary page) in the **<appSettings>** section of the **Web.config** file. This setting is used to control what HTML layout file is used ***for that page***. If the setting is present and set to "true", then Millennium Drive will use the custom layout file. If the setting is not present, or if **value="false"**, then the system uses the standard HTML layout file for the page.

Note: After you edit and save the **Web.config** file, you must restart IIS, refresh the browser window, and log in again to see the changes.

Returning to the Standard Drive Views for All Pages

To stop using customized views and return to the Millennium Drive default views, use the following steps:

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="UseCustomViews" value="true" />** setting. Set value="false".
3. Save the changes to **Web.config**.

This change might require that users refresh the page in the browser before they see the default view.

Managing Updates to Millennium Drive

This chapter discusses how future updates to Millennium Drive will impact the data sources (views) and page layouts for the Drive configurable pages. This chapter is important to review if your organization maintains customized views and/or a customized layout for one or more pages.

Configurable Page Data Considerations

The data sources on configurable pages pull data from the dedicated Millennium Drivedatabase views. If your organization is using a customized version of these Drive database views, they must always parallel the standard Drive database views in terms of column name, position, data types, and column lengths.

When Community Brands 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.

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

Page Layout Considerations

The page layouts of all configurable pages are controlled by specialized HTML layout files, located in the custom\layouts subfolder of the Millennium Drive directory. If your organization has customized the layout of one or more configurable pages, then you are using at least custom HTML layout file, which most likely duplicates many of the elements that are present in the corresponding standard layout file.

When Community Brands updates Millennium Drive, the standard layout files might be modified to add or remove page elements, implement new functionality, and/or to support changes that are made to the standard database views. System changes that could break your custom layouts will be documented in the release notes.

Community Brands will not overwrite or otherwise modify your organization's customized page layout files. Your organization is responsible for making the corresponding changes to these files. You will also be responsible for adjusting the customized layout files as required to reflect any changes that Community Brands makes to the standard database views. For example, if column names in the views change, then references to them in any custom layout files you may have must be changed as well.

Although Community Brands will not touch your customized layout files, it is still important to back them up to a safe location before installing Millennium Drive updates.

Examples

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

Display Giving Interests

Suppose your organization uses attributes to keep track of constituent giving interests. (Giving Interest attributes have an attribute group code of **gi** for Giving Interests.) Although your organization also uses attributes to track other things, you only want to show attributes in the **Giving Interests** group on the **Summary** page; i.e., you want to filter out all attributes that do not belong to this group. You also want to change the generic heading "Attributes" to the more specific heading "Giving Interests" and remove the redundant display of "Group" with each attribute. You would do the following:

1. Review the steps in Summary Page Data to create the **mgo_x** views in the Millennium database and configure Millennium Drive to use custom views.

2. Review the steps in Layout for the Summary Page to create **custom\layouts\summary-x.html** in the Millennium Drive directory and configure Millennium Drive to use the custom page layout file.

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

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

4. In **custom\layouts\summary-x.html,**change the heading "Attributes" to "Giving Interests" and remove the "Group" display by replacing the highlighted text in this block of code:

```
<section>
  <column size=6>
    <header>Attributes</header>
    <list view="attributes">
      <text-with-data cols="1,5">
        <text>Type</text>
        <data field="typeVal"></data>
      </text-with-data>
      <text-with-data cols="1,5">
        <text>Group</text>
        <data field="group"></data>
      </text-with-data>
    </list>
  </column>
</section>
```

with:

```
<section>
  <column size=6>
```

```
    <header>Giving Interests</header>
     <list view="attributes">
       <text-with-data cols="1,5">
         <text>Type</text>
         <data field="typeVal"></data>
       </text-with-data>
     </list>
   </column>
</section>
```

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

Suppose that 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**.) Accordingly, you want to display **# Years Giving** instead of **Consecutive Years Giving** in the **Giving** section of the **Summary** page. You would do the following:

1. Review the steps in Summary Page Data to create the **mgo_x** views in the Millennium database and configure Millennium Drive to use custom views.

2. Review the steps in Layout for the Summary Page to create **custom\layouts\summary-x.html** 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:

```
OR memname = 'numyrs'
```

4. Edit **custom\layouts\summary-x.html** to replace the **Consecutive Years Giving** summary with the **# of Years Giving** summary.

   Replace the highlighted text in this block of code:

```
<section header="Giving">
  <list view="giving" horizontal filter="memname=abila1,abila2,abila3,abila4">
    <subheader field="descrip"></subheader>
    <amount field="memamount" number=0></amount>
  </list>
</section>
```

   with:

```
<section header="Giving">
  <list view="giving" horizontal filter="memname=abila1,numyrs,abila3,abila4">
    <subheader field="descrip"></subheader>
    <amount field="memamount" number=0></amount>
  </list>
```

```
</section>
```

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

Display the Preferred Year

Suppose you want to display the constituent's preferred year instead of birthday and age on the **Summary** page **Details** section. You would do the following:

1. Review the steps inSummary Page Data to create the **mgo_x** views in the Millennium database and configure Millennium Drive to use custom views.

2. Review the steps in Layout for the Summary Pageto create **custom\layouts\summary-x.html** 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 **custom\layouts\summary-x.html** 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:

   ```
   <section>
     <column size=6>
       <header>Details</header>
       <text-with-data row>
         <text>Born</text>
         <date field="birthdate"></date>
         <data> ({{data.summary.age}} years old)</data>
       </text-with-data>
     <list view="prospect">
         <text-with-data cols="4,8">
           <text field="pm_TypeVal"></text>
           <data field="pm_Name"></data>
         </text-with-data>
       </list>
     </column>
     <column size=6>
       <header>Open Proposals</header>
       <mgo-proposal-list state="open"></mgo-proposal-list>
     </column>
   </section>
   ```

   with:

   ```
   <section>
   ```

```
  <column size=6>
    <header>Details</header>
    <text-with-data row>
      <text>Preferred Year</text>
      <data field="text1"></data>
    </text-with-data>
    <list view="prospect">
      <text-with-data cols="4,8">
        <text field="pm_TypeVal"></text>
        <data field="pm_Name"></data>
      </text-with-data>
    </list>
  </column>
  <column size=6>
    <header>Open Proposals</header>
    <mgo-proposal-list state="open"></mgo-proposal-list>
  </column>
</section>
```

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

Database Views for Millennium Drive

The data sources for the configurable pages are a set of dedicated Millennium database views. This appendix describes the database views available to Millennium Drive.

Insert Task View

This form adds a task associated with a constituent, including:

- Task name
- Assignee
- Start and Stop dates
- Completion date
- Reminder information
- Notes and Additional information

Column #	Column Name	Data Type	Notes
1	Action For	char(6), null	The constituent associated with the action.
2	Action	char(6), null	The action type.
3	Assigned To	char(6), null	The assigned constituent is displayed. The assignee cannot be changed on this form.
4	Type	char(6), null	The task type, as defined by the **source_types** lookup table entries.
5	Task Priority	char(6), null	The task priority, as defined by the **priority** lookup table entries.
6	Task Status	char(6), null	The status of an on-going task, as defined by the **task_status** lookup table entries.

Column #	Column Name	Data Type	Notes
7	Task Date and Time	date, time, or char	This section includes a set of date, time, and character fields that are displayed contextually based on the user's choices. These fields are standard cannot be configured.
8	Subject	char(160), null	A brief description of the task.
9	Location	varchar(255), not null	A text field used to identify a location for the task if necessary.
10	Comment	varchar(4000)	A text field designed to hold longer comments about the task.
11	text1	varchar(255), 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_inserttask** view.
12	text2	varchar(255), not null	
13	text3	varchar(255), not null	
14	text4	varchar(255), not null	
15	text5	varchar(255), not null	
16	date1	datetime, not null	
17	date2	datetime, not null	
18	date3	datetime, not null	
19	date4	datetime, not null	
20	date5	datetime, not null	

Column #	Column Name	Data Type	Notes
21	date6	datetime, not null	
22	date7	datetime, not null	
23	date8	datetime, not null	
24	date9	datetime, not null	
25	date10	datetime, not null	
26	date11	datetime, not null	
27	date12	datetime, not null	
28	number1	numeric(10,0), not null	
29	number2	numeric(10,0), not null	
30	number3	numeric(10,0), not null	
31	number4	numeric(10,0), not null	
32	number5	numeric(10,0), not null	
33	number6	numeric(10,0), not null	
34	number7	numeric(10,0), not null	
35	number8	numeric(10,0), not null	
36	number9	numeric(10,0), not null	
37	number10	numeric(10,0), not null	

Column #	Column Name	Data Type	Notes
38	number11	numeric(10,0), not null	
39	number12	numeric(10,0), not null	
40	money1	money, not null	
41	money2	money, not null	
42	money3	money, not null	
43	money4	money, not null	
44	money5	money, not null	
45	money6	money, not null	
46	money7	money, not null	
47	money8	money, not null	
48	money9	money, not null	
49	money10	money, not null	
50	money11	money, not null	
51	money12	money, not null	
52	check1	char(1), not null	
53	check2	char(1), not null	
54	check3	char(1), not null	
55	check4	char(1), not null	
56	check5	char(1), not null	
57	check6	char(1), not null	
58	check7	char(1), not null	
59	check8	char(1), not null	

Column #	Column Name	Data Type	Notes
60	check9	char(1), not null	
61	check10	char(1), not null	

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	
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	

Column #	Column Name	Data Type	Notes
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 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	

Edit Task View

Standard view name: mgo_edittask

Custom view name: mgox_edittask

This form allows the user to edit selected fields for a task associated with a constituent, including:

- Task type, priority, and status
- Start and Stop dates
- Completion date
- Reminder information
- Notes and Additional information

Column #	Column Name	Data Type	Notes
1	Task Action	displayed text	The task action is displayed. It cannot be changed on this form.
3	Assigned To	displayed text	The assigned constituent is displayed. The assignee cannot be changed on this form.
4	Task Type	char(6), null	The task type, as defined by the **source_types** lookup table entries.
5	Task Priority	char(6), null	The task priority, as defined by the **priority** lookup table entries.
6	Task Status	char(6), null	The status of an on-going task, as defined by the **task_status** lookup table entries.
7	Task Date and Time	date, time, or char	This section includes a set of date, time, and character fields that are displayed contextually based on the user's choices. These fields are standard cannot be configured.
9	Subject	char(160), null	A brief description of the task.
8	Location	varchar(255), not null	A text field used to identify a location for the task if necessary.
10	Comment	varchar(4000)	A text field designed to hold longer comments about the task.
11	text1	varchar(255), 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_edittask** view.
12	text2	varchar(255), not null	

Column #	Column Name	Data Type	Notes
13	text3	varchar(255), not null	
14	text4	varchar(255), not null	
15	text5	varchar(255), not null	
16	date1	datetime, not null	
17	date2	datetime, not null	
18	date3	datetime, not null	
19	date4	datetime, not null	
20	date5	datetime, not null	
21	date6	datetime, not null	
22	date7	datetime, not null	
23	date8	datetime, not null	
24	date9	datetime, not null	
25	date10	datetime, not null	
26	date11	datetime, not null	
27	date12	datetime, not null	
28	number1	numeric(10,0), not null	
29	number2	numeric(10,0), not null	
30	number3	numeric(10,0), not null	
31	number4	numeric(10,0), not null	

Column #	Column Name	Data Type	Notes
32	number5	numeric(10,0), not null	
33	number6	numeric(10,0), not null	
34	number7	numeric(10,0), not null	
35	number8	numeric(10,0), not null	
36	number9	numeric(10,0), not null	
37	number10	numeric(10,0), not null	
38	number11	numeric(10,0), not null	
39	number12	numeric(10,0), not null	
40	money1	money, not null	
41	money2	money, not null	
42	money3	money, not null	
43	money4	money, not null	
44	money5	money, not null	
45	money6	money, not null	
46	money7	money, not null	
47	money8	money, not null	
48	money9	money, not null	
49	money10	money, not null	

Column #	Column Name	Data Type	Notes
50	money11	money, not null	
51	money12	money, not null	
52	check1	char(1), not null	
53	check2	char(1), not null	
54	check3	char(1), not null	
55	check4	char(1), not null	
56	check5	char(1), not null	
57	check6	char(1), not null	
58	check7	char(1), not null	
59	check8	char(1), not null	
60	check9	char(1), not null	
61	check10	char(1), not null	

Giving Summary View

Standard view name: mgo_givingsum

Custom view name: mgox_givingsum

This view has one record per record where:

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

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

Data Source

The standard data source (view) and layout for the **Giving Summary** page only displays Summary 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 **Constituent Giving** and **Constituent Summary** pages.
  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 **Constituent Giving** and **Constituent 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	
14	memmny4	money, not null	

Column #	Column Name	Data Type	Notes
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	
37	memmny27	money, not null	

Column #	Column Name	Data Type	Notes
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	
60	memdate15	datetime, not null	

Column #	Column Name	Data Type	Notes
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	
83	memyesno8	char(1), not null	

Column #	Column Name	Data Type	Notes
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 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 has one record per separately listed (i.e., not in an address record) 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 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 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 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.

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 constituent’s birth year. This is a four-digit year between 1600 and 2200.
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 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	

Column #	Column Name	Data Type	Notes
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	
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	

Column #	Column Name	Data Type	Notes
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	
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	

Column #	Column Name	Data Type	Notes
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	

Log Files

Messages from the Millennium Drive application are recorded in the **Drive.txt** and **Drive.Error.txt** log files that are located in the **logs** folder in the Millennium Drive directory. The **logs** folder default location is **inetpub/MillMGO**. If a user encounters an error while working in Millennium Drive, he or she is instructed to contact the system administrator. The administrator can access the log files to find out why the user got an error and take steps to correct the error or contact Millennium Customer Support if the error cannot be corrected.

Log File Details

Log file entries will include the following:

- warning messages
- informational messages
- messages for debugging purposes
- error level messages
- fatal application errors

Each entry will note the date and time, the severity level, the instance of the log manager that wrote the entry, and the message. The source of the message and a trace of the issue will be added to the log entry if they are available.

Every message from Millennium Drive will be written to **Drive.txt**. Only fatal and error level messages will be written to **Drive.Error.txt**.

Each log file can grow to 5 MB. Once it reaches 5 MB, the system will back it up and begin a new one. The system stores up to 5 backups for **Drive.txt** and up to 5 backups for **Drive.Error.txt**, after which it deletes them, from oldest to most recent.

Customizing the Log Files Location

The **logs** folder is located in the Millennium Drive directory on the Web Server (IIS) computer. The **logs** folder location can be changed by editing the **log4net** section in the Millennium Drive **Web.config** file.

If the **logs** folder location is changed, then the new folder must be shared, and the following share and security permissions must be granted to the Millennium Anonymous Access (MillAppPool Identity) User account:

- **Share Permissions** - Full Control
- **Security Permissions** - Full Control

Note: The *Application Settings Administrator's Guide* provides details about the editable application and log settings in the Millennium Drive **Web.config** file. Download this guide at https://kb.communitybrands.com (*KB article 30266*).

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