

# GIFTS Online

## Release Notes v6.2

This document contains a brief summary of the features of GIFTS Online v6.2. For more in-depth information on any of the features discussed, please refer to the GIFTS Online Help page.

### CLIENT PRODUCTION SITES WILL BE UPGRADED

- July 8, 2016 UK – Downtime Window – 2:00 pm – 8:00 pm US, EST
- July 9, 2016 US – Downtime Window – 6:00 am – 8:00 pm US, EST

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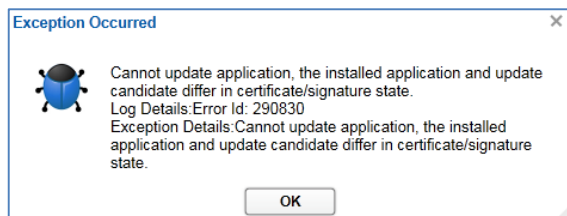
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## Update the Document Template Manager

This release includes an update to the Document Template Manager's security certificates! To continue using Document Template Manager, you will need to update it.

If the certificate is not updated, an Exception error will occur.

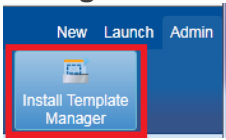
"Cannot update application, the installed application and update candidate differ in certificate/signature state."



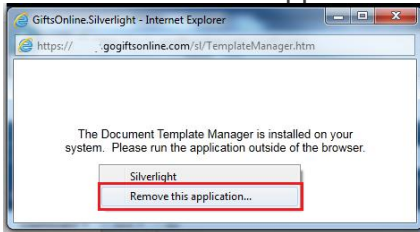
**On each workstation where the Document Template Manager is installed**, you must first **uninstall** the current Document Template Manager and then **reinstall**, this will renew the certificate until 2021.

Please follow the instructions starting on page 2.

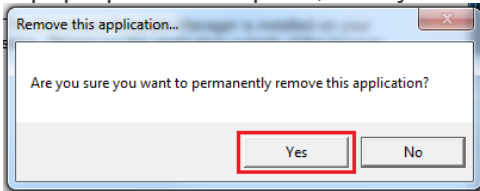
- 1) To access the Template Manager, go to the Admin menu on the header and select **Install Template Manager**.



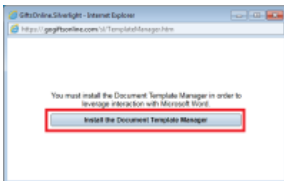
- 2) A new browser window will open with the text, “The Document Template Manager is installed on your system. Please run the application outside of the browser.” With your mouse, right click in this window and select “Remove this application.”



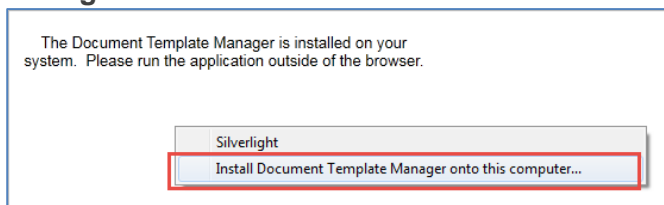
- 3) A pop-up window opens, “Are you sure you want to remove this application?” Click – Yes



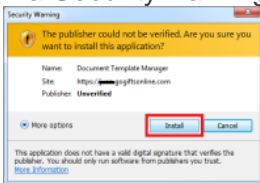
- 4) The pop-up window will close and the Document Template Manager will be uninstalled.
- 5) The pop-up window will change to a message prompting you to install the *Document Template Manager*. Click the button – **Install the Document Template Manager**:



- a) If the window does not have the install button – right click and choose **Install the Document Template Manager**:



- 6) If a Security warning is displayed, click **Install** to continue.



- 7) The Template Manager will quickly be installed and a GIFTS Online Login screen will appear. Simply Login as usual to access the **Document Template Manager**.



- 8) The GIFTS Online Document Template Manager opens in the new pop-up.



- 9) From this point forward you will use the **Document Template Manager** icon placed on your desktop or in your programs list to start the Template Manager. If you attempt to use the menu option **Admin > Template Manager** again, a message will be displayed prompting you to use the icon on your Windows desktop instead. As an added measure of security, when you open the Document Template Manager, it will ask you to login again.

## User Login Security Questions Enhancements

Users will now have an expanded list of security questions to choose from when they are initially logging in or modifying their security questions and answers in the Security section within the User ribbon menu.

### Site-Wide Security Settings

Contact MicroEdge Services to adjust the number of questions to match your organizations policies.

- 2 to 10 questions can be stored per user.
- 2 to 10 questions can be required to be answered correctly to reset a password.

## Updates to Grantee Email Templates

For added security, several updates have been made related to grantee passwords in emails.

- Grantee passwords will no longer be transmitted over email (except for temporary passwords).
- Temporary passwords will expire after 24 hours and will be randomized chars/numbers. If expired, grantee will need to redo Forgot Password process.
- The <<password>> merge field will no longer be an option in the Forms Manager > Settings > Account Designer.
- Any template that still has the <<password>> merge field will now say “password hidden to protect your privacy”.

To prevent any confusion, we recommend updating the Password Update email template in Account Designer>Emails to remove the <<Password>> merge field.

Old text: Per your request: Your account password has been changed to «Password».  
New text: Per your request: Your account password has been changed.

## Currency

The new Currency feature can be enabled by MicroEdge Services. Currency has been designed to meet the needs for international grants.

### Terminology

- **Functional Currency** - This is the main currency that will display. By default, your Functional Currency is U.S Dollars (USD).
- **Local Currency** - This is the currency that Users may select in Request or Payment records to reflect a grantee's local currency.
- **Rounding Factor** - This determines how many decimal points will show in currency fields.
- **ISO Currency Codes** – These are the standardized codes used to represent Currencies. Click the ISO link to learn more: <http://www.xe.com/iso4217.php#C>

### Workspace for Currency

The Currency space is where you will manage the currencies other than the Functional Currency.

Clients will be able to manage the following:

- Open/Edit Currency display properties
- Add a new Currency
- Update a Currency/Exchange Rate/Rate Date
  - Currency History and Auditing
- Set Currency Preferences

### Using Currency on Request and Payment Edit Forms

The Currency fields will not automatically be added to any existing forms upon the upgrade or enabling of the functionality. They must be manually added to these either by the Client or by MicroEdge Staff. The fields will be added to the system default forms when the functionality is enabled. The details of the fields and the changes to forms are noted below.

#### Field Library > Requests

The following fields will be visible in the Fields Library under the Request category when Currency is enabled:

- Local Currency
- When Exchange Rates Change
- Requested Local Amount
- Requested Amount Rate Date
- Requested Amount Exchange Rate
- Recommended Local Amount
- Recommended Amount Rate Date
- Recommended Amount Exchange Rate
- Grant Local Amount
- Grant Amount Rate Date
- Grant Amount Exchange Rate

#### Field Library > Payments

The following fields will be visible in the Fields Library under the Payment category when Currency is enabled:

- Local Currency
- Local Amount
- Amount Rate Date
- Amount Exchange Rate
- When Exchange Rates Change

## Edit Forms

Below are examples of how the currency sections will appear in the edit forms area of adding a request. Select a Local Currency to reflect a grantee's local currency:

▲ Currencies

Local Currency	(EUR) Euro	
When Exchange Rates...	Adjust Local Amount	
Requested Functional Amount	\$0.00	Local Amount €0.00
Rate Date	6/2/2016	Exchange Rate 1.030000
Recommended Functional...	\$0.00	Local Amount €0.00
Rate Date	6/2/2016	Exchange Rate 1.030000

## Currency in other areas of GIFTS Online

The new currency fields will be seen in other areas of GIFTS Online:

### Currency Fields in View Columns

List of View Columns Added for Currency:

- Request: Local Currency Id
- Request: Local Currency Name
- Request: Local Currency ISO Code
- Request: Grant Local Amount
- Request: Original Grant Local Amount
- Request: Grant Amount Exchange Rate
- Request: Grant Amount Rate Date
- Request: Recommended Local Amount
- Request: Recommended Amount Exchange Rate
- Request: Recommended Amount Rate Date
- Request: Requested Local Amount
- Request: Request Amount Exchange Rate
- Request: Request Amount Rate Date
- Request: Paid Local Amount
- Request: Balance Local Amount
- Request: Project Budget (Not a new View column but logic added so that a new calculator displays the amount with either the functional currency symbol or the local symbol based on the system preference)
- Request: Local Currency Adjustment Method (displays: "Adjust Functional Amount", "Adjust Local Amount", or "Adjust Neither Amount")
- Payments: Local Amount
- Payments: Local Currency Id
- Payments: Local Currency Name
- Payments: Local Currency ISO Code
- Payments: Local Currency Block (shows Currency, Amount and Exchange Rate)
- Payments: Amount Exchange Rate
- Payments: Amount Rate Date
- Activities: Local Amendment Amount (the currency comes from the payment when the activity payment ID > 0 and the payment other\_currency\_id > 0 or comes from the request when the activity request ID > 0 and the request other\_currency\_id > 0... otherwise, the functional currency is used).

### Currency Fields in non-calculated View columns

These fields are like other non-calculated View column fields in that:

- The View columns can be formatted based on their field type
- They can be added to calculations in a custom calculated field
- They can be added as Merge fields
- They can be used in Reports
- They can be printed (Workspace Option)
- They can be exported (Workspace Option)

### **A note on the Project Budget field in the Request edit form:**

There is a Currencies Preference that dictates the currency formatting for the Project Budget field in the Request Edit Form. When this preference is set to Always use Local Currency for Request's Project Budget, the Project Budget field in the Request Edit form will be formatted in that Currency (symbol, # of decimals), however there is no conversion to the units for the field upon change in Local Currency.

**Example:** The Project Budget is \$50,000, the user selects a Local Currency for the request of Euro. The Project Budget value will still be 50,000 (units) but the formatting will change from \$50,000.00 to €50,000.00. To help the user be aware of this, since the Project Budget field is not in the Currency Section, a message will appear to alert the user to this change.

### **Amend a Grant using Currency**

The Grant Amendment supports Currency payments when the Grant has a currency selected.

The method for updating either the Functional or Local amount when the Exchange Rate changes (by changing the Rate Date) will follow that set in the Request. When the update method is set to update neither the Functional nor Local amount, if the amounts get out of sync due to a change to the Exchange Rate, you will be alerted and asked to update one or the other which will trigger the other to update.

The following are the scenarios where the Grant Amendment can happen:

- Manual Action on an Approved Request
- Adding a Payment to an Approved Request which when totaled with all other payments exceeds the Grant Amount
- Modifying an existing Payment which when totaled with all other payments exceeds or is less than the Grant Amount
- Issuing a Refund which effectively reduces the Grant Amount
- Deleting a Scheduled Payment which effectively reduces the Grant Amount
- Cancelling a Payment and not issuing a Replacement effectively reduces the Grant Amount

### **Currencies in Request Approvals**

Currency is supported in a single Request Approval. (NOTE: Currency is not supported in batch Request Approvals.)

When a Request has a local currency selected, the following fields will be added:

- **Grant Local Amount:** Editable when the user has permission to approve. This calculates based on the Grant Amount value and exchange rate from this screen. Note that this may default to a different Rate Date than the Rate Date that was in the Request record, which is consistent with the field behavior in Alta.
- **Rate Date:** Editable when the user has permission to approve. This defaults to the Meeting Date if present in the Request, otherwise to the Current Date.
- **Exchange Rate:** Read only. It populates based on the exchange rate for the selected Local Currency, and the Rate Date.
- **Local Currency:** Read only. Populates from the Request record.
- **Exchange Rate Changes:** If an Exchange Rate changes in this UI due to the Rate Date being modified, the update method (Functional or Local) from the Request record will determine which value is updated here (Grant Amount or Grant Local Amount). If 'Neither' is selected as the method in the Request, the user will be prompted to choose what to update.

## **Currencies in Request Declinations**

When an Approved Request is rolled back to Pending or is Declined, there are values that are cleared out of the record in the database related to the Approval.

## **Currency Fields in Searches**

No new basic search filters have been added for this release around the Currency fields, however the Currency fields have been added to Advanced Searches.

## **Currency Display Formatting**

The following is a breakdown of formatting for currency displays in GIFTS Online. Contact MicroEdge Services to enable Currency settings.

The currency symbol that is displayed is calculated as follows:

- For the functional currency, the symbol comes from the attributes of the currency as defined in the master ISO currency list.
  - For any other Local currency, the symbol comes from the symbol in the Exchange Rate table.
  - The grouping separator(s) comes from the user's browser culture.
- The grouping size(s) comes from the user's browser culture.
- The decimal separator comes from the user's browser culture.
- The location of the currency symbol comes from the user's browser culture.

# Blackbaud Outcomes

## **Outcomes in GIFTS Online**

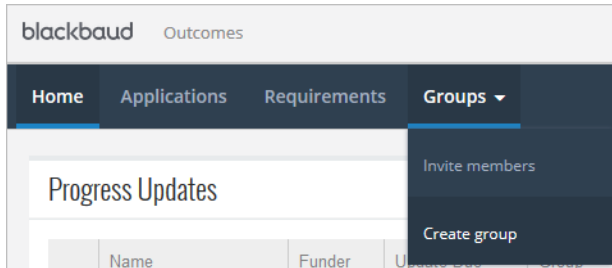
The following changes have been made to the Outcomes features in GIFTS Online:

- All Outcomes related forms in GIFTS Online now support regional text/date/number/time formatting for USA, CAN, GBR, and AUS depending on your browser location setting. **This includes all field labels and taxonomy measures.**
  - color, learned, fiscal vs. colour, learnt, financial
  - 1,000.23 vs 1.000,23
  - 12/31/2016 vs 31/12/2016
  - 1:00 PM vs 13:00
- All Outcomes related forms in GIFTS Online now display currency values according to the funder's chosen functional currency. The following currencies are supported.
  - \$ / USD
  - \$ / CAD
  - £ / GBP
  - \$ / AUD
  - € / EUR

## Outcomes Portal Updates

The following changes have been made to the Outcomes Portal:

- Outcomes portal users can now create multiple grantee user groups to share documents with its members.



This includes progress updates, applications, and requirements.

A new Group column also makes identifying shared documents easier.

NOTE: If a Request or Requirement has been shared with a user group, its ownership cannot be transferred to another user. The new user must be invited to the user group by a current member to access the record.

- Outcomes portal pages now support regional text/date/number/time formatting for USA, CAN, GBR, and AUS depending on the user's browser location setting.
- Outcomes portal pages now display all currency values according to the funder's functional currency if it is one of the currencies supported (USD, CAD, GBP, AUD, or EUR). Depending on the funder, the grantee may see currency values displayed in one of the five supported currencies.



## Resolved Issues

The following issues are resolved in this release. We have provided the case numbers for internal referencing along with a description of the issue and resolution.

Salesforce ID	Title
350176	Publish to web error only occurs with specific records
346791	Batch Approve Requests does not allow creation of 1 Payment
342412	Dashboard drill down date filter does not work correctly with UK browser
343736	Dashboard summary does not match drill-down/workspace results with Branch Security
343874	Request balance not calculating correctly when Mark first payment as paid is set to true
344259	Custom fields with name >43 chars do not save in searches
344228	Corrupt files messing with merge to PDF action
344260	Standard Request and Requirement reports do not respect branch security
344727	Forms Manager - Custom values fields with apostrophes not rendered correctly
345597	Document template manager does not prompt for auto update
341546	Cross-Team: Review declination notes does not seem to work
350287	Publish requirement fails - logged error is Error occurred processing request. Registry error
345583	Password reset on GO Mobile not generating email
346139	GO Admin Utility allows User Reviewer Access, does not validate email address
350195	Error occurs while sending a password reminder email message
350488	Budget - View subcategory child items window does not scroll with View All option
345763	Budget category folder icon does not render
297258	GO Mobile Regression Bug - Cannot open organization records - error is "the given key was not present in the dictionary"
337295	GO Mobile - adding org extended field www to a request form breaks
335892	Different applicants to one recommender is not working properly
341111	Form designer - requirements allow custom payment fields to be edited
345952	Stage 2 applications do not respect Form property for Organization Name
340307	Review portal - unable to open submitted reviews with specific questions enabled
345885	Quick Submit in Reviewer Portal allows users to bypass answering Required fields created in Blueprint
339998	Branch and Review Portal Counter doesn't work correctly
318931	Cannot increase GIFTS Online link to outlook timeout greater than 10 minutes
343784	Applications are retrieved prior to actual submission
338326	Invalid chars in connection string cause sites to not load
342509	Budget export is randomly rearranging categories/ adjustments on report
309400	Changed tab label in IGAM form reverts back to old label
334479	256 char description is not saving in form manager

## Support

**Support Hours:** M-F, 8:00 am – 8:00 pm ET

**Phone:** 877.704.3343

**Email:** [helpdesk@microedge.com](mailto:helpdesk@microedge.com)

**Online:** [www.microedge.com](http://www.microedge.com)

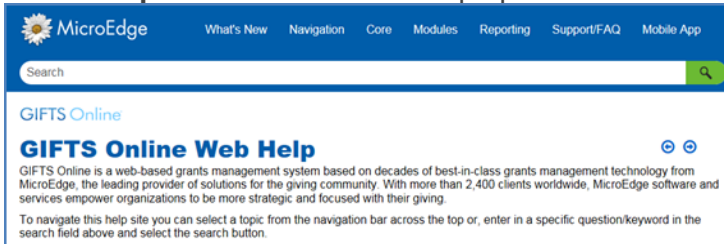
- For information on troubleshooting common issues, see the **Technical Support** section in the online help.
  - In the top menu bar of **GIFTS Online**® under your name, is the *User Menu*.



- Select the triangle next to your name to view the User Menu options: Logout, Change Password, Security, Views, Searches, Preferences, Help



- Select **Help** and the online web help opens in a new window:



## The MicroEdge Community Resources Site

To keep up with all the latest news on MicroEdge products, access our knowledgebase, or join in relevant discussions on our forums, go to - <https://community.blackbaud.com/products/microedge>.

## The GIFTS Online How-To Documents Page

For the most current information or a copy of previous release notes, visit the GIFTS Online How-To page: <https://www.blackbaud.com/howto/giftsonline>