MICRO EDGE®

VERSION 6.6

GIFTS® 6

User's Guide

NOTICE

The software described in this document is furnished under a license agreement. The software may be used or copied only in accordance with the terms of the agreement. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of MicroEdge, LLC. Information in this document may be revised from time to time without notice.

U.S. Government Users: *Use, duplication, or disclosure is subject to the restrictions as set forth in the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 subparagraph (c)(1)(ii), or the Commercial Computer Software -- Restricted Rights at CFR 52.227-19, subparagraphs (c)(1) and (2), as applicable. Manufacturer is MicroEdge, LLC. 619 W. 54th Street, New York, NY 10019.*

Copyright © 2014 by MicroEdge, LLC. All rights reserved.

Part number: GFW66-UG

Publication date: December 2014

GIFTS, Employee GIFTS, Matching GIFTS, Volunteer GIFTS, Essential GIFTS, GIFTS Connections, MyGIFTS, Award, Riverside Grants, and the Grants Manager are trademarks of MicroEdge, LLC. Other brands, or products, are the trademarks or registered trademarks of their respective holders, and should be treated as such.

Contents

Welcome to GIFTS x
Where to Find the Information You Need xi
Conventions Used in This Manual xii
Chapter Summaries xiv
Using the GIFTS Documentation Set xvii
Using Online Help xviii
Maintenance and Support Program xix
Using the Documentation xxi
.....xxi

1 Workflow and the GIFTS Design 1
About Your Organization's Workflow 2
About the Design of GIFTS 4
About the Organizer, Report Library, and Calendar 9
About Optional GIFTS Modules 12
About GIFTS Connections 14

2 Basic Instructions 15
Logging in to and out of GIFTS 16
Managing Your Password 17
The GIFTS User Interface 18
Data Entry 25

Working with Coding Sheets 29

3 Working with the Organizer 37

Organizer Tour 38
Working with Records in the Organizer 44
Using the Zoom Feature 47
Working with the Organizer Columns 49
Working with Combined Columns 58
Changing the Organizer Sort Order 61
Using Organizer Views 63
Viewing Summary Information 70
Charting Summary Information 70
Refreshing the Organizer Grid 77
Refreshing System Settings 78
Clearing the Organizer Grid 78

4 Searching for Data in GIFTS 81

Overview of the Organizer Search Facilities 82
Using the Quick Find Search 85
Refining a Quick Find Search 89
Quick Find Property Type Reference 93
Using Recent Searches 101
Using Saved Searches 101
About Advanced Searches 108
Complex Search Example 111
Running an Advanced Search 113

5 Reporting in Essential GIFTS 119
Setting Up and Running Ad Hoc Reports 120
Using Organizer Views for Reports 122
Essential GIFTS Print Options 122
Exporting Data from the Organizer 128

6 Quick Entry 131
About Quick Entry 132
Step 1: Beginning a Quick Entry Session 134
Step 2: Specifying the Recipient Organization 135
Step 3: Specifying the Primary Contact 136
Step 4: Entering Address Information 138
Step 5: Entering the Request Information 139
Step 6: Saving the Request and Sending Correspondence 142

7 Working with Organizations 145
About Organization Records 146
Avoiding Duplicate Organizations 146
Searching for Organizations 147
Organizations Folder 149
Adding and Modifying Organizations 151
Organization Affiliations 166
Organization Subsidiaries 169
Using Organization Alerts 173
Deleting an Organization 175
Researching an Organization 175

8 Working with Requests 177

About Requests 178
Searching for Requests 178
About the Requests Folder 180
Adding or Modifying a Request 182
Decision Making 198
Locking and Unlocking Requests 209
Renewing Grants 211
Amending a Grant 214
Using Request Alerts 217
Processing Batches of Requests 218
Request Affiliations 229
Transferring a Request to Another Organization 231
Transferring Requests to Another Branch 232
Transferring a Request to a New IGAM Owner 234
Deleting a Request 236
Percentage Coding for GIFTS Requests 236

9 Working with Payments 251

About Payments 252
Accessing Payments 255
Creating and Modifying Payments 262
Canceling a Payment 270
Paying a Payment 271
Using Payment Holds 275
Voiding a Payment 276
Reissuing a Payment 277

Consolidating and Splitting Payments 278
Using Payment Alerts 279
Uploading Payment Status to IGAM 280
Entering Refunds 282
Contingent Payments 285
Deleting a Payment 286

10 Multi-Currency in Requests and Payments 289

About Currencies and Exchange Rates 290
Local/Other Currencies in Requests 291
Local/Other Currencies in Payments 297
Adding or Modifying Currencies in Requests 300
Working with Multi-Currency Requests 307
Working with Multi-Currency Payments 314

11 Working with Requirements 321

About Requirements 322
Accessing Requirements 322
Searching for Requirements 326
Adding and Modifying Grant Requirements 327
Adding and Modifying Payment Requirements 331
Assigning Staff to a Batch of Requirements 333
Marking a Single Requirement as Done 335
Deleting a Requirement 337
Exporting Requirements to Outlook 338
Creating an IGAM Account for a Grantee 339
Sending an Online Requirement to a Grantee 341

Transferring One or More Requirements 344
Removing an Online Requirement from the Web 345

12 Working with Contacts 347

About Contacts 348
Accessing Contacts 349
Searching for Contacts 350
The Contacts Folder 351
Adding and Modifying Contacts 353
Assigning Mailing Lists to a Batch of Contacts 367
Using Contact Alerts 368
Deleting Contacts 370
Exporting Contacts to Outlook 370

13 Working with Affiliations 375

About Affiliations 376
Primary and Secondary Affiliations 379
Accessing Affiliations 381
Searching for Affiliations 386
The Affiliations Folder 388
Creating and Modifying Affiliations 390
Correspondence for Contacts and Affiliations 397
Managing Affiliations When Relationships End 400

14 Generating Correspondence 407

About Merged Correspondence 408
The Correspondence Generation Wizard 408

Creating Correspondence and Write-ups 412
Creating Batch Correspondence 420
Creating Mailing Labels 424
Viewing and Editing Documents 424
Sending E-mail Messages 424

15 Working with Activities 429

About GIFTS Activities 430
Accessing Activities 431
Searching for Activities 435
Adding and Modifying Activities 437
Marking Activities as Done 445
Transferring Activities to Another Branch 448
Deleting an Activity 449
Exporting Activities to Outlook 450

16 Working with the Calendar 457

Accessing the Calendar 458
Displaying Data in the Calendar 458
Working with Records in the Daily View 465
Printing the Monthly Calendar 466
Printing the Daily Calendar 467
Exporting from the Calendar to Outlook 467
Closing the Calendar 470

17 Working with Documents 471

About Documents and Document Activities 472

About the Documents Folder 472
Searching for Documents 474
Viewing and Editing Documents 475
Editing Document Links 476
Moving Documents 479
Transferring Documents to Another Branch 480
Removing Documents and Document Activities 481
Locking and Unlocking Documents 482
Using the Document Manager 484
Linking a Batch of External Documents 489

18 Reporting from the Organizer 499

About Organizer Reporting 500
Setting Up and Running Ad Hoc Reports 502
Setting the Print Options 503
Changing a Report's Type 522
Running Reports 527
The Active Reports Viewer 528
Saving an Ad Hoc Report 531
Modifying a Saved Organizer Report 533
Deleting a Saved Organizer Report 534

Welcome to GIFTS

Thank you for choosing GIFTS!® GIFTS is the premier system for tracking grants from the time proposals are received until the final payment is made. GIFTS is easy to use and is available in a wide variety of configurations that meet the needs of foundations, corporate giving programs, and any other grant making organization.

Grant makers choose GIFTS to manage their giving programs for many reasons. You can retrieve and classify proposals, generate letters, manage contacts, schedule and monitor activities, maintain complete organization histories, track payments, and much more.

In This Chapter

Where to Find the Information You Need.....**xi**

Conventions Used in This Manual ..... **xii**

Chapter Summaries .....**xiv**

Using the GIFTS Documentation Set..... **xvii**

Using Online Help ..... **xviii**

Maintenance and Support Program.....**xix**

Using the Documentation .....**xxi**

Note: If you are using Essential GIFTS, the level of functionality that you have is dependent on which of the options, such as the Contacts Manager, that you have purchased. Please be sure to read "Essential GIFTS Functionality" on page xii for more information.

Where to Find the Information You Need

The information you need depends on your level of experience with GIFTS and your role within the grant making process. Use the following descriptions to determine how to best use this manual.

If you've never used GIFTS:

Be sure to read "Workflow and the GIFTS Design" on page 1 to gain an understanding of the grant making process and how GIFTS is designed to assist with this process. This general knowledge is essential.

You should also read "Basic Instructions" on page 15, which explains the basics of the GIFTS user interface. If you are familiar with the Microsoft® Windows® operating environment, you can skim most of this chapter—but there are a number of shortcuts and tips specific to GIFTS that you'll probably find helpful.

Since the task-oriented information in this manual is very detailed, consider using your *Introduction to GIFTS* Course Manual as a tutorial. The procedures in the training manual are less detailed, and will help you become familiar with the system. When you need more detailed information, you can refer to the online help or the *GIFTS User's Guide*.

If you've used a previous release of GIFTS:

You probably understand your organization's workflow and how to use most GIFTS features, but you aren't familiar with recent enhancements to the system. Use the index or table of contents to find step-by-step instructions for using these new features.

In fact, you might find that index and search features of the online help system are the best resource when you have specific questions.

If you're responsible for setting up GIFTS:

GIFTS provides a wide range of features, some of which may not be appropriate for, or needed by, your organization. To plan the implementation of your system, and to choose the features that you want to

enable, refer to the *GIFTS Setup* Course Manual and its accompanying Implementation Workbook.

Before your users enter data, you must set up the system and, if your organization uses the optional Budget Module, open the Budget. If you need additional assistance, you can contact MicroEdge for information about our implementation consulting services.

For step-by-step, detailed information about setting up GIFTS after you've planned your implementation and completed the worksheets in the Implementation Workbook, please refer to the *Administrator's Guide*.

Conventions Used in This Manual

Before you read the *GIFTS User's Guide*, it is helpful to familiarize yourself with the conventions used throughout this manual. Doing so will enhance the usefulness of the documentation.

Essential GIFTS Functionality

For users of Essential GIFTS, the level of functionality that you have is determined by the options, such as the Contacts Manager, you have purchased. The following icons are used in this manual to indicate which features are available on your system.

Icon	Description
	This feature is available for users of the Contacts Manager option.
	This feature is available for users of the Correspondence option.
	This feature is available for users of the Calendar / Activity Tracking option.
	This feature is only available in GIFTS.

Please note that the name "GIFTS" is used generically to refer to any configuration of the system, including the Essential GIFTS configurations.

Since GIFTS is a modular system available in a variety of configurations, the screens shown in this document may not always reflect the configuration of your system.

Example: The number of folders displayed in the GIFTS Organizer is dependent upon your configuration. Here are the Organizer folders for a basic GIFTS configuration:

These are the folders for a system with optional modules:

Procedural and Typographic Conventions

Procedural conventions help identify procedures and tasks you'll perform.

- Important procedures are always given as a numbered set of tasks.
- Check marks indicate a checklist of general items or tasks.
- Characters given in this font are examples of data that you should enter, such as the directory path to a file.
- Data elements within the GIFTS system are presented with an Initial Capital Letter. For example, the word "request" is capitalized when it is used to refer to a Request record within GIFTS.

Different Types of Notes

When appropriate, notes provide additional information or warnings that may apply to you. The *GIFTS User's Guide* uses four types of notes. Each type of note serves a unique purpose as defined below.

Note: A note with this format and the heading "Note" provides information that applies to some users. Notes apply to special situations. For example, a

Note might explain minor differences in setup procedures among network and standalone systems.

Important: A note with this format and the heading "Important" provides information that applies to all users. This type of note provides information that is essential to the completion of a task.

Caution: A note with this format and the heading "Caution" provides important information that applies to all users. Pay special attention to these notes, because they are provided to help you avoid making unintended changes to your GIFTS data.

Tip: A note with this format and the heading "Tip" provides useful information that applies to most users. Although Tips are not essential to the completion of a task, they provide alternative methods, shortcuts, or special applications relating to the procedures in the text.

Chapter Summaries

Most of the information in this manual is task oriented, and includes step-by-step instructions for using GIFTS. For general information and concepts that explain—in a larger sense—how to use GIFTS to assist your grant making activities, you can refer to "Workflow and the GIFTS Design" on page 1.

Be sure that you understand your organization's workflow and the GIFTS file structure before you begin entering data.

Chapter	Description
"Workflow and the GIFTS Design" on page 1	Explains the importance of establishing a workflow, and includes a sample workflow for a cash grants giving program. It then describes how you can use GIFTS on a day-to-day basis to assist your giving programs.

Chapter	Description
“Basic Instructions” on page 15	Describes how to start GIFTS and use its data entry fields, tools, and menus. Users experienced with Windows applications can skim this chapter.
“Working with the Organizer” on page 37	The Organizer is the most important tool in GIFTS; it is the means through which you access all of the information in your database. Familiarizing yourself with its usage and functions can give you a head start in mastering the system.
“Searching for Data in GIFTS” on page 81	Describes how to use the Organizer search facilities to find data that you’ve stored in GIFTS.
“Reporting from the Organizer” on page 499	Describes how to generate ad hoc reports from the GIFTS Organizer. You can print these reports, export their data to other file formats, and save them to the GIFTS Report Library.
“Reporting in Essential GIFTS” on page 119	Describes how Essential GIFTS clients generate ad hoc reports from the GIFTS Organizer. You can print these reports or export them to a spreadsheet.
“Quick Entry” on page 131	Describes how to enter immediate declinations, pending proposals, and historical grants using the GIFTS Quick Entry feature.
“Working with Organizations” on page 145	All of the organizations that request funding are entered into your database as Organization records. This chapter details how to enter and maintain Organization information, including addresses, telephone numbers, tax status information, and classifications.
“Working with Requests” on page 177	The term *Request* encompasses all of the information you gather and record on the proposals you receive for funding—including those that are pending, declined, or awarded as grants. This chapter explains how to track your Requests as they progress through your workflow.
“Working with Payments” on page 251	When you award a grant, GIFTS creates a Payment Schedule that includes information about each individual Payment that will be paid. This chapter describes how to work with your Payment Schedules, covering important topics like contingent and voided Payments.

Chapter	Description
"Multi-Currency in Requests and Payments" on page 289	This chapter explains how to track Request and Payment amounts in another currency, using exchange rates stored in the GIFTS Administrator Module.
"Working with Requirements" on page 321	Most grant makers have certain requirements—such as progress reports or site visits—that are placed on grantees when grants are awarded. This chapter describes the use of Requirements for both grants and payments.
"Working with Contacts" on page 347	This chapter describes the process of entering and maintaining Contact information, including address, telephone number, and background information. GIFTS tracks all of the Contact's affiliations with Requests and Organizations, including *roles* that describe his or her relationship to each individual group or project.
"Working with Affiliations" on page 375	Affiliations link Contacts to the Organizations with or for whom they work, and with Requests that they manage or oversee. Understanding Affiliations and using them properly is key to good Contact management in GIFTS.
"Working with Activities" on page 429	This chapter describes how to track events that relate to your grant making—such as telephone calls and meetings.
"Working with the Calendar" on page 457	The Calendar provides you with a view of all of the activities related to your grant making process. This section describes the information available from the Calendar, and how to use it to view and manage your Activities and Payments.
"Generating Correspondence" on page 407	This chapter describes how to generate correspondence and write-ups that include your grant making data. You can produce both printed letters and e-mail messages.

Chapter	Description
"Working with Documents" on page 471	This chapter describes how to locate, view, and manage documents that you created with the Correspondence feature. Clients who have the optional Document Manager can also link external documents to GIFTS.

Using the GIFTS Documentation Set

The GIFTS documentation provides step-by-step procedures and reference information on GIFTS features. These manuals assume you have a working knowledge of your operating system and its conventions, including how to use a mouse and standard menus.

GIFTS includes the following documentation:

GIFTS User's Guide Describes how to use GIFTS to manage your giving, including how to enter data, search for data, and run ad hoc reports from the GIFTS Organizer.

Installation and Technical Reference Guide Contains system requirements and detailed installation procedures.

Using GIFTS Reports Describes how to run reports from the GIFTS Report Library. Includes a variety of sample reports for the GIFTS and Employee GIFTS products.

GIFTS Administrator's Guide Describes how to set up and maintain your GIFTS system. This manual should be read by the person within your organization who is designated as the GIFTS Administrator.

Related Documentation

If you use optional GIFTS modules, you will receive additional documentation.

Employee GIFTS User's Guide Describes how to track matching gifts and volunteer gifts with the Employee GIFTS Module.

Budget Module User's Guide Describes how to use the Budget Module to track your committed, granted, and paid funds.

Internet Grant Application Module User's Guide Describes how to review grant applications that have been submitted through the Internet.

A/P Module User's Guide Describes how to use the A/P Module to share data with an external accounting system or to print checks.

Import Module User's Guide Describes how to import data from external systems into the GIFTS database.

The GIFTS Connections Documentation Set

If you have set up a GIFTS Connections server and have users and/or reviewers accessing GIFTS data online, you will receive additional documentation.

MyGIFTS User's Guide Describes how to get the most out of your online GIFTS data access using MyGIFTS.

MyGIFTS Administrator's Guide Describes how to set up GIFTS Connections and MyGIFTS to grant your users online access to GIFTS data.

Reviewers Module and ReviewerConnect User's Guide Describes how to extend the functionality of the GIFTS Reviewers Module by granting reviewers online access to their Reviews.

For more information on the resources available to you as a MicroEdge client, please refer to the MicroEdge *Client Resource Guide*.

Using Online Help

While you work with GIFTS, you can find answers to your questions by reading the documentation or by using GIFTS online help. Use online help when you need immediate assistance. Most of the material that is in the printed documentation is also in online help.

From the Help menu of any GIFTS module, you can:

Choose	To
Contents	Display the contents of the GIFTS online help.
Index	Display the index of the GIFTS online help.
MicroEdge on the Web	Go to the MicroEdge homepage. (*http://www.microedge.com*)
	❖ MicroEdge Knowledgebase ❖ GIFTS Compatibility Fact Sheet These links in the GIFTS Help menu now take you to the MicroEdge Support Services webpage. For access to the current knowledgebase and online documents please login to GIFTS PowerME.
Technical Support	Display information about contacting MicroEdge Technical Support.
About GIFTS	Display copyright and release information for GIFTS.

Maintenance and Support Program

Members of MicroEdge's Maintenance and Support Program receive unlimited telephone consultation on the use of the software, assistance in error isolation and correction, prompt furnishing of any available problem solutions relating to the currently supported versions of GIFTS, and software updates.

Our toll free Technical Support hotline is available Monday through Friday, 8:00 A.M. to 8:00 P.M. Eastern time. You may contact MicroEdge's Technical Support Specialists as follows:

Phone	1-877-704-3343
E-mail	*helpdesk@microedge.com*

Web	Go to *www.microedge.com* and login to the PowerME portal to access the knowledgebase. To submit a new case, click the Cases tab at the top of your PowerME homepage and then click the Create New Case button.

Note: To access the web, you must have an Internet connection (either a LAN connection or a dial-up connection) and a frames-enabled browser (Microsoft Internet Explorer 8.0 or later, or Firefox/Chrome).

For details about our support policies, please refer to the MicroEdge *Client Resource Guide*. If you have any questions regarding the Maintenance and Support Program, please contact our Client Administration Representative at 1-800-899-0890, option 6, then 2, who will be happy to assist you.

Using the Documentation

MicroEdge provides you with the GIFTS documentation in Portable Document Format (PDF). To view these files, you will need to install Adobe®'s Acrobat® Reader, which is available for free from Adobe Systems, Inc. at *http://www.adobe.com*.

The documentation allows you to print out selected pages, sections, chapters, or the entire book. You can also install the files on your computer or network so you can access them online, and take advantage of features such as a "hot" table of contents, index, and cross-references within books.

Acrobat Reader's other features are described in the Reader's online Help. Note that MicroEdge does not provide technical support for the Acrobat Reader. We cannot assist you with the installation, configuration, or use of this product.

1 Workflow and the GIFTS Design

This chapter puts the design of the GIFTS system in the context of a typical grant making workflow to show you the important role GIFTS can play in your organization's daily activities.

Implementation of GIFTS is the responsibility of your Administrator, and is described in the *GIFTS Administrator's Guide*.

In This Chapter

About Your Organization's Workflow **2**

About the Design of GIFTS..... **4**

About the Organizer, Report Library, and Calendar **9**

About Optional GIFTS Modules..... **12**

About Your Organization's Workflow

Your *workflow* is the process by which your organization handles requests for funding. For each of your giving programs, your organization should define a workflow that describes how requests are to be handled—from receipt, to approval or declination, to the conclusion of grants management.

The following diagram illustrates the workflow of a cash grants giving program:

(from Agenda Report)
Board Meeting
Declined
Send Declination Letter
Approved
Schedule Payments
Schedule Requirements
Send Award Letter
Grant Management
Payments
* Process
* Resolve
Requirements
* Reminder
* Received
End of Year
* Reports

About the Design of GIFTS

This section describes the following GIFTS concepts:

✔ The GIFTS system structure

✔ Data consistency

✔ How to track Requests using their Request Type, Disposition, and Status

Being familiar with the system structure will make it much easier for you to understand the interrelationship of information in the database, and aid your searches, reporting, and general navigation through the system.

System Structure

GIFTS divides your grant making activities into major topics, or file folders, to make this information easier to find and to manage. Think of these folders as drawers in your filing cabinet. We will build a diagram to illustrate the system structure as we describe each folder.

Your grant making activity revolves primarily around the organizations that request funding. Therefore, the first folder is the Organization folder. It is here that you enter and maintain all of the information pertaining to an Organization, including its address, telephone numbers, and Tax Status.

In addition, each Organization connects to the Addresses file, where its address is stored. Addresses can be shared by other Organizations or individuals that use the same address. Each Organization also connects to a

Coding Sheet, where it is classified according to your custom-defined classification system.

Information about the people related to your grant making activity is stored in the Contacts folder. Contacts can share Addresses with Organizations, and are associated with Organizations by one or more Affiliation records that detail their relationship with the Organization.

By using Affiliations, you can associate the same Contact with many different Organizations, while retaining specific information about his or her relationships (such as a job title or role like 'Sponsor') with each Organization.

Your most important interaction with Organizations is with their requests for funding. The Requests folder stores information regarding each project, including the Request Amount and Project Title. Each Request is associated

with the Organization that requested funding, each Contact involved in the project, and a Coding Sheet used to classify it for reporting and queries.

Each Request that is awarded can be associated with its Payments. The Payments folder stores all of the information on each individual Payment, allowing you to produce complex financial reports and other cash-flow analyses.

Your grant-tracking process includes many Activities, or actions. GIFTS tracks several kinds of Activities:

- To Do (scheduling) Activities track events associated with your grant making activities, such as meetings, site visits, phone calls, etc.
- Historical Activities track important events that have taken place within the system, such as an amendment to a grant's amount.
- Requirements track materials owed and other contingencies placed upon Requests and specific Payments.
- Document Activities manage your correspondence and other documents.
- Import and Export Activities track data flowing in and out of your system.

Data Consistency

The GIFTS database is designed to manage information related to your grant tracking. Keep in mind that consistency is the key to a database that produces meaningful, accurate reports and queries. When using GIFTS, take into consideration the consistency of your data over time, making sure that any historical data you have entered or will enter is consistent with your current data.

Request Type, Disposition, and Status

Since your organization may handle different types of Requests—for instance, many grant makers have a different workflow for each of their giving programs—you can define a Request Type that identifies each type of Request as belonging to the appropriate program. For instance, 'Cash Grants,' 'Dinners and Events,' and 'In Kind' are commonly-used Request Types.

At any given time, each Request in GIFTS has a Disposition and a Status. You can use these two indicators to keep track of which stage in your workflow a particular Request has reached.

There are three Dispositions, which give a general indication of a Request's place within your workflow:

Disposition	Type of Request
Pending	Proposals
Approved	Grants
Declined	Declinations

The Status of a Request gives more detail about its progress in your workflow. For example, assume a Request has a Disposition of 'Declined' and a Status of 'Declined by Staff.' With this information, you could tell exactly where this Request resides within the sample workflow illustrated on page page 2.

The three Dispositions are permanently defined by the system because these general classifications can apply to all Requests in any workflow. In contrast, there are separate Status classifications for each Request Type in your system.

For example, a foundation might use the following Status codes for Cash Grants Requests:

Disposition	Status Codes
Pending	Initial Review Ready for Decision Considered for Board
Approved	Active Grant Closed Grant
Declined	Staff Declined Board Declined

In contrast, the following Status codes would be more appropriate for Dinners and Events Requests:

Disposition	Status Codes
Pending	Invited
Approved	Accepted Attended Tickets Donated Tables Full Tables to be Filled
Declined	Declined

About the Organizer, Report Library, and Calendar

The Organizer, Report Library, and Calendar present even the most casual user with the maximum amount of information in an easy-to-use format. They form the main interface between the user and the system.

The GIFTS Organizer

The GIFTS Organizer places all of your current and historical information at your fingertips. On the screen, a series of folders are represented; to view or access information, you simply "look into" the appropriate folder.

When you search for specific information, the contents of the folders reflects your current interest and omits irrelevant data. You can create complex queries in the Organizer, print them as ad hoc reports, and work with items like Requests and Organization records.

The Calendar

The Calendar provides quick and easy access to information by presenting you with a visual calendar. Relevant Activities and Payments—for either yourself or any other user of the system—are displayed on the calendar. You can scroll through the calendar, view a detailed list of items for a specific day,

and access your Activities and Requirements to manage existing tasks and add new ones.

The Report Library

The Report Library gives you access to the GIFTS standard reports. From this view, simply choose the report you wish to run—the information you request is calculated and displayed in a presentation-quality format.

You can print a hard copy of the report or export it to a word processor, spreadsheet, Internet browser, or a variety of other formats.

About Optional GIFTS Modules

GIFTS uses a modular approach to functionality: separate software modules can be linked, allowing each client to build a system that meets their specific needs. In keeping with this approach, some modules are standard with every GIFTS system, and others are available for purchase separately.

For a comprehensive list of MicroEdge products and services, please refer to the current edition of the MicroEdge *Client Resource Guide*.

Module	Description
GIFTS (standard)	This is the core system, which includes all of the functionality necessary for grants management.
Administrator (standard)	The Administrator Module is where system security is set, your letter templates are defined and maintained, the classification structure is maintained, and the library settings for Standard Reports are contained.
Internet Grant Application Module (purchased separately)	Enables you to post grant applications and requirements online, and receive completed applications and requirements to a dedicated review database. Applications can either be rejected or transferred to your GIFTS database for further review. Requirements are automatically transferred to GIFTS.
A/P Links (purchased separately)	Enables you to exchange your payment information with your accounting department in a variety of electronic formats, or to print check requisition forms for manual processing.
Check Writer (purchased separately)	Enables you to print checks for your grant payments directly from GIFTS.

Module	Description
Budget (purchased separately)	For grant makers who wish to track their giving against a pre-defined yearly budget. A budget is established at the beginning of the fiscal year and all grant Payments for that year are resolved against the budget. This enables you to compare your spending against your budget and produce statistical and summary reports.
Document Manager (purchased separately)	Allows you to link documents produced outside of GIFTS—such as reports in word processors, spreadsheets, scanned documents, electronic proposals, and so forth—to your grant making data.
Matching GIFTS (purchased separately)	Verifies matching gifts against program guidelines and limits, making recommendations about whether they should be Approved or Declined. Upon Approval, the system automatically calculates the award amount based on the program guidelines and limits. Approved gifts are grouped together for check processing and become an integral part of your giving history.
Volunteer GIFTS (purchased separately)	Assists in processing corporate programs that award organizations based on volunteer work by employees. Verifies gift applications against program guidelines and limits, making recommendations about whether the applications should be Approved or Declined. Approved applications are integrated into the total company giving history.
GIFTS Customizer (purchased separately)	Although GIFTS is a comprehensive system designed to handle the needs of the most complex giving programs, some grant makers may need to track highly-specialized information. The GIFTS Customizer allows you to create your own data entry fields to record the information you want.
GIFTS Plus Pack .NET Extension (purchased separately)	The GIFTS Plus Pack is a set of .NET add-on utilities that integrate seamlessly into GIFTS to offer extensive options for updating batches of records, verifying tax status information, verifying watchlist information, updating and adding organizations, batch requirement and payment scheduling, enhanced charting, and enhanced e-mail capabilities. The utilities are built on the Microsoft .NET platform, and are accessed from within GIFTS for a seamless user experience.

About GIFTS Connections

The GIFTS Connections Server makes it possible to access and edit data in your GIFTS database through a Web browser. The Server retrieves data from your GIFTS database and formats it using HTML for display in a Web page.

In turn, the Server can also receive data from users connecting through the Web interface and save it to the database in the proper form. This allows users the flexibility to connect to your GIFTS system from anywhere while your organization maintains a single database.

The GIFTS Connections Server is the hub of the GIFTS Connections suite of products. With the Server translating data to browser-ready form—and back again—GIFTS Connections modules designed for specific audiences are ready to be added:

Module	Description
MyGIFTS	MyGIFTS is designed to give members and employees of your organization convenient and versatile access to your GIFTS database from remote locations. Whether connecting through an intranet or over the Internet, your users have a way to interact with GIFTS right in their Web browser.
ReviewerCONNECT	This GIFTS Connections product works with the optional Reviewers Module. ReviewerCONNECT is designed to give reviewers convenient access to your proposals from remote locations. Internal and external reviewers can provide instant feedback on new proposals by editing and submitting Review data online.

2 Basic Instructions

Read this chapter to familiarize yourself with the basic features of GIFTS and the elements of the GIFTS user interface, including the menus, toolbars, and windows. Users who are experienced with other Microsoft Windows applications should be able to skim many parts of this chapter.

In This Chapter

Logging in to and out of GIFTS **16**

Managing Your Password **17**

The GIFTS User Interface **18**

Data Entry **25**

Working with Coding Sheets **29**

Logging in to and out of GIFTS

Access to GIFTS is restricted to users who are registered in the system; the security features are set up by your GIFTS administrator. This section describes how to:

- Start GIFTS
- Manage the password that controls access to your user account
- Log in as a different user while you are in GIFTS
- Exit GIFTS

Starting GIFTS

To start GIFTS, you must have a login ID assigned by your GIFTS administrator. The GIFTS administrator may also provide you with a password to use with your login ID. If you do not know your login ID or your password, or if you have trouble logging in to GIFTS, please contact your administrator.

Note: If your administrator has integrated your Windows NT login with GIFTS, you are not prompted to log in.

To start and log in to GIFTS:

1. Select MicroEdge GIFTS from the Programs folder of the Windows Start menu, and choose MicroEdge GIFTS from the submenu.

   You are prompted to log in.

2. Enter your login and password. For information about creating your password, please refer to "Managing Your Password" on page 17.
3. Click OK. GIFTS starts.

Logging in as a Different User

In some cases, it is convenient to log in to another user's workstation while he or she is using GIFTS. You can log in without having to exit out of the system or log in on another machine.

1. From the Main menu, choose Options ➤ Change User. You are prompted to log in.
2. Enter your login and, if necessary, password.
3. Click OK.

Exiting GIFTS

When you are finished with a GIFTS session, choose File ➤ Exit from the Main menu to exit the GIFTS application.

If you are using additional modules, such as the Administrator Module, Budget Module, or A/P Module, exiting GIFTS does not exit these modules. Choose File ➤ Exit from the Main menu of each module in order to exit them.

Caution: Never shut off your computer without first exiting out of all applications, including Windows. Turning off the power to your computer or restarting without first closing GIFTS and all your other software applications can cause damage to your system.

Managing Your Password

If your Administrator did not provide you with a password, you can set a password for your user account. Once you've created a password, you can change it at any time.

Caution: Be sure to maintain the confidentiality of your login ID and password. Failure to do so could result in unauthorized access to your GIFTS database. MicroEdge suggests your password be the maximum eight characters in length, and contain a combination of letters and numbers. Common words and significant dates (birthdays, anniversary dates) do not make effective passwords.

To Set or Change Your Password

1. Log in to GIFTS.
2. From the Main menu, choose Options ➤ Change Password. You are prompted to enter a password.

3. Leave the Old Password field blank, since no password currently exists for your user account.
4. Enter a password into the New Password field.
5. Enter the password into the Verify field exactly as you entered it in Step 4. This ensures that you typed the password correctly.
6. Click OK. Your password is saved.

The GIFTS User Interface

The elements of the GIFTS user interface comply with the standards used by most Windows applications. This section describes how to select items displayed on your screen, as well as detailing the tools and menu options

available. The use of data entry fields is described in “Data Entry” on page 25.

Selecting Items

Often, you work in GIFTS by selecting an item, such as a Request, and then initiating an action. For example, you might select a proposal from a list of Requests and then approve it.

In general, you select items displayed on your screen by moving the pointer over them and clicking the left mouse button once. To indicate that you have selected an item, GIFTS highlights it. For example, here a user has highlighted a pending Request:

Note: Throughout this manual, selected items upon which an action is to be performed are referred to as being *highlighted*.

Selecting Multiple Records

You can select more than one record in order to perform the same operation on all of the selected records at once. To select more than one record, hold CTRL as you click on records. Each record you click on is highlighted; you can de-select records by clicking on them again.

You can also select a record, hold SHIFT, and click another record to select all of the records in between.

Selecting All Records

To select all of the records in the Organizer, you can do one of the following:

- click the right mouse button and choose Select All
- choose Edit ➤ Select All from the Main menu
- press CTRL+A.

All of the records in the Organizer are highlighted.

Main Toolbar

A toolbar is a group of buttons that each represent a certain function. If you click on a button, the corresponding function that it represents is performed.

The Main toolbar in GIFTS is located at the top of the screen. The toolbar and the buttons on it remain constant regardless of the data view or entry screen you are currently displaying. However, buttons are disabled and enabled to fit the options available to you at that moment.

Enabled buttons appear in full color; you can click them to initiate an action. Disabled buttons appear dimmed; nothing happens if you click a disabled button.

To view the Quick Help message that describes a tool, move the mouse pointer to the button and allow it to remain there. After a brief pause, the Quick Help message is displayed.

Menus

The Main menu is displayed at the top of the GIFTS screen, and consists of the File, Edit, View, Action, Quick, Options, and Help menus. Each of these menus contains a number of options that are appropriate for the data being viewed.

Menus are also displayed at the top of data entry forms like Request records and Payment records. These menus include tools and options that are appropriate for the individual record. For example, you can choose Action ➤ Approve from a Request record to approve the Request.

Selecting Menu Items

To select a menu item, move the pointer to one of the menus in the Main menu and click the left mouse button once. The menu is "pulled down" and the choices on it are displayed. You can select an item within the menu by moving the pointer to the desired item and clicking the left mouse button. As described in the screen below, you can also use the keyboard to select menu items.

To select items with the keyboard, look for the underlined letters. To select Print, for example, press ALT+F to open the File menu, then ALT+P to select Print.

Some menu items have a fast shortcut. You can press CTRL+P to select Print without opening the File menu.

Hot Links

Fields that are displayed in blue—such as an Organization's Web site address or a Contact's e-mail address—are "hot links." You can view the Web site or send an e-mail message by clicking on the hot link. For details, see "Adding and Modifying Organizations" on page 151 or "Adding and Modifying Contacts" on page 353.

If you are using the Quick Entry form to enter data into GIFTS, you can use the hot links on the form to "jump" to the records that you are working with. For details, see "About Quick Entry" on page 132.

Another kind of GIFTS hot link allows you to open an Organization or Contact record from within an associated Request. Hot links to Organization records are also available in associated Payment, Contact, and

Activity records; Contact records can be opened from Organization records as well.

Contact and Organization names appear underlined when they are available from within another record, as shown in the Request record below:

Click the underlined Organization name to open the Organization record for Girl Scouts of America.

Click the associated Contact's name to open Ms. Philip's Contact record.

Grid Displays

GIFTS often displays information in the form of a grid made up of rows and columns. The most frequently used is the Organizer grid:

Grids are used to display a variety of information. For example, Process Logs display information in a grid.

Note that you can identify a grid by the following characteristics:

- ✔ The color of the rows in the grid alternates between white and light yellow to help you distinguish between the items in the grid.
- ✔ If the grid has more than one column, each column has a title that appears in the top border of the grid.
- ✔ Along the top and left borders of the grid, thin lines divide each item.
- ✔ On the left side of the grid, an arrow indicates which item is currently selected.

With the following options, you can change the size of the grid items to meet your needs.

Re-sizing a Grid

You can change the width and height of the items in a grid. To adjust the width and height of the items in a grid, move the pointer to one of the

vertical or horizontal lines that divides the columns or rows. The pointer will change to the re-size tool.

You can now click and drag the line to increase or decrease the width or height of the column or row. When the column or row is the appropriate size, release the mouse button.

Hiding Grid Columns

To hide a column, move the pointer to the column title and click the right mouse button. The column is hidden.

You can click the right mouse button here to restore hidden columns.

A small area of the hidden column is displayed so that you can expand the column later by clicking the right mouse button in this area. If you are printing an ad hoc report from the Organizer, this area does not appear on the report. Hidden columns are restored when you exit GIFTS.

You can also hide and restore columns by re-sizing them. Note that you cannot right-click on a column to restore it if you hid it with the re-size tool.

Data Entry

This section describes how to enter data into the text, date, numeric, and coded fields that you will encounter while entering data into your GIFTS system.

Working with More than One Record

You can work with more than one record at a time in GIFTS. Open two or more Requests, Organizations, Contacts, or other type of GIFTS record and compare data side by side. You can even copy and paste information from one form to another.

These GIFTS records will appear as separate tasks in the Windows taskbar. You can click on the taskbar to switch between the GIFTS records that you have open.

Entering Text Fields

You can enter characters (letters, numbers, and so forth) into a text field without restriction. The Project Title field for Requests is an example of a

text field. To enter data into a text field, first move the cursor into it using either of the following methods:

- Move the pointer to the field and click the left mouse button.
- Press TAB to move the insertion point from field to field (until it is in the text field).

You can use the standard Windows editing commands within the GIFTS text fields:

Command	Description
Cut (CTRL+X)	Cut the highlighted text to the Windows clipboard. The item is removed from the field or document. You can then paste it within GIFTS or into another application, such as a word processor or spreadsheet. The item remains in the clipboard until the next copy or cut command, or when you exit Windows.
Copy (CTRL+C)	Copy the highlighted text to the Windows clipboard. You can then paste it within GIFTS or into another application, such as a word processor or spreadsheet. The item remains in the clipboard until the next copy or cut command, or when you exit Windows.
Paste (CTRL+V)	Copy the text from the Windows clipboard into the current insertion point. The material remains in the clipboard and can be pasted multiple times.

Spell Checking Text Fields

You can check the spelling of the text in any field that is marked with "F3=Spell." For example, you can spell check the Background field within an Organization record.

To run a spell check:

1. Make sure that the cursor is inside the field you want to check.
2. Press F3. The spell checker verifies that each word is spelled correctly.
   - If no words are misspelled, a message indicates that the spell check is complete.

❖ If there are spelling errors, the spell check options are displayed.

The Not in Dictionary field contains the word that was not found in the spell checker's dictionary. The following options are available:

Option	Description
Ignore	Ignore the current word and proceed to the next misspelled word.
Ignore All	Ignore all occurrences of this word within the field you are spell checking.
Add	Add the current word to your Custom Dictionary; it is permanently saved to the Custom Dictionary on your workstation. The filename of your Custom Dictionary is specified in the Add Words To field. The spell checker uses both its Main Dictionary and your Custom Dictionary. Regardless of the Custom Dictionary you are using, the spell checker always has access to its Main Dictionary.
Change	Replace the existing word with a new word indicated in the Change To field. Select a word in the Suggestions list or type a new word in the Change To Field to enable this button.
Change All	Change all occurrences of this word to the word displayed in the Change To field.
Cancel	Cancel the spell check.

Entering Date Fields

Date fields are displayed and entered in the format defined in your Windows Regional Settings. For more information about the Regional Settings, please refer to the "regional settings" entry in the Windows online help index.

GIFTS verifies that the dates you enter exist. For example, you cannot enter February 29, 2005 because 2005 is not a leap year.

To enter a date, you can:

- Type the date into the field.
- Press F3 to enter the current date into the field.
- Press F4 or click the down arrow to the right of the field to choose the date from a calendar. The date currently entered in the field (or the current date, if the field is blank) is highlighted. To choose a specific date, click on it.

Entering Numeric Fields

Enter numbers or digits into numeric fields using your keyboard. If NUMLOCK is pressed, you can enter numbers using the keypad. Any decimal points or commas needed are automatically supplied.

Entering Currency Fields

Enter numbers or digits into currency fields using your keyboard. If NUMLOCK is pressed, you can enter numbers using the keypad. Any decimal points, currency symbols, or commas needed are automatically supplied.

By pressing INSERT, you can toggle between "insert" mode, in which you can enter additional digits into the field, and "overwrite" mode, where you can overwrite existing digits but not insert additional digits.

The currency used by GIFTS is determined by the Windows Regional Settings. For more information, please refer to the "currency settings" entry in the Windows on-line help index.

Entering Coded Fields

A coded field has a list, maintained by your administrator, from which you can select a value to enter in the field. Coded fields are used throughout the system.

To select a value for a coded field, click the list to display the possible values. Click on the value you wish to select:

You can also type an entry into a coded field. The auto-complete feature will fill in the rest of the entry. For example, if you wanted to change the Status field above to 'Active Grant,' you could type only the first letter or two, and the rest of the coded entry would appear.

Working with Coding Sheets

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Requests, Organizations, and Contacts that allows you to choose classifications from a set of Categories defined by your GIFTS administrator.

These coding sheets are loaded each time you log in to GIFTS, so they will not reflect updates or changes made by your administrator during your GIFTS session. If your administrator has made code changes while you are logged into GIFTS, choose Options ➤ Refresh System Settings from the Main menu to make the changes available. Your codes will also update when you log out of GIFTS, and then log back in for a new session.

Note: Essential GIFTS does not have Coding Sheets for Organizations or Contacts.

Example: This is the Coding Sheet for a Request.

Note: The number of codes that you can specify for any given record is limited to approximately 60.

Coding Sheets are also displayed when you search by Coding Sheet data using the Quick Find.

Adding Codes

To add classifications to a Coding Sheet, click on a category or highlight the category and click Add. The available codes are displayed.

Note the following features that enable you to find the code you want quickly and easily:

- In the Find field, you can enter the first several letters of a code and press ENTER or TAB to search for it. GIFTS highlights the first code that contains those letters. To locate the next code that contains those letters, choose Action ➤ Repeat Find from the menu or press F3.

- You can use the arrows on the toolbar or click on the folder icons to collapse and expand the levels, or "tiers," of codes.

- GIFTS remembers whether you chose to 'expand all' or 'collapse all' levels each time you work with a category, and automatically expands or collapses all of the levels the next time you work with that category.

- You can also highlight a folder and click Expand Branch to expand the levels beneath it.

- The Select Codes window is a Smart Form.™ To change its position, click and drag on the daisy at the top left of the form. To re-size it, click and drag on the bottom right corner. GIFTS remembers the size and position between your GIFTS sessions.

Tip: When coding Organizations and Requests, you can add codes for multiple Categories without closing this window by clicking on the Categories on the Coding Sheet as you work with the codes.

When coding Organizations and Requests, you don't have to close the Select Codes window to work with a different category. Just click on a category to view its codes.

In each category, you can select one or more codes. The number of codes allowed for each category is defined by the GIFTS administrator. If you attempt to add a code after the limit has been reached, GIFTS gives you the option to replace the existing code or, if more than one code is allowed, one of the existing codes.

Choose a code to replace, if necessary, and click OK to replace the existing code.

Primary and Secondary Codes

If more than one code is specified for a category, the *primary code* is displayed in blue on the Coding Sheet, and the *secondary codes* are displayed in green. This section describes how primary and secondary codes are used in the GIFTS Report Library and in the merge templates for your letters, write-ups, and checks.

Report Library Most GIFTS reports use primary codes to group records. For example, in the "Grant Summary by Program Area 1" report, a grant with multiple Program Area codes is listed only once in the report, and is grouped by its primary Program Area code.

The use of primary codes also ensures that records are not repeated within the report, which would "inflate" the total information for the report.

Some GIFTS reports, however, group records by both primary and secondary coding information. (These reports include the phrase "including secondary codes" in their titles.) In these reports, the same record may be listed multiple times—once for each code that you assigned. In these reports, the totals are "inflated" because records are listed more than once.

Merge Templates If you create letters, write-ups, and checks from GIFTS, they merge data from GIFTS to your letter, write-up, or check. Your administrator can set up your templates to "include secondary codes" for fields that merge data from your Coding Sheets.

For information about setting up letter and write-up templates, please refer to the *GIFTS Administrator's Guide*. For information about check templates, please refer to the *A/P Module User's Guide*.

Lowest Level Coding

If your administrator has required coding at the lowest level for a category, you must select the lowest (most detailed) coding level available. If you select a higher level, the following message is displayed.

Inactive Codes

Occasionally, your organization may determine that a code is no longer relevant to your grant tracking. Your administrator can mark codes that are no longer used as *inactive*. Inactive codes are not available for data entry.

Wherever an inactive code was used (before being marked inactive), it is followed by "(Inactive)" to indicate that the code is no longer used.

3 Working with the Organizer

The Organizer is an advanced information management tool that allows you to search for and work with your grant making data with a minimum amount of effort. This chapter includes a tour of the Organizer and describes how to use the Organizer to view your grant making data.

In This Chapter

Organizer Tour **38**

Working with Records in the Organizer **44**

Using the Zoom Feature **47**

Working with the Organizer Columns **49**

Changing the Organizer Sort Order **61**

Using Organizer Views **63**

Viewing Summary Information **70**

Charting Summary Information **70**

Refreshing the Organizer Grid **77**

Clearing the Organizer Grid **78**

Related Topics

Overview of the Organizer Search Facilities **82**

About Organizer Reporting **500**

Organizer Tour

The Organizer is arranged like a file drawer: it displays a set of file folders that contain different types of information. Within these folders are records that contain information about a specific item, such as a grant request. A record is like a piece of paper within a folder.

From within each folder you can search for a particular record or records, open an existing record to view or modify its data, create new records, and perform request-processing functions—such as approving a grant or making a payment.

This section introduces the Organizer design and its major features, and explains how to navigate within the Organizer.

Organizer Folders

The following folders represent the way in which your data is stored in the GIFTS database. For more information about the design of the GIFTS database, please refer to "About the Design of GIFTS" on page 4.

Folder	Description
Organizations	You can create an Organization record for any organization associated with your grant making process, such as a grantee that has submitted requests for funding. An Organization record includes all of the information pertaining to an organization, including its Primary Contact, Address, and Tax Status.
Requests	For each request for funding, you can enter a Request record. The disposition of a Request can be Approved (grant), Pending (proposal), or Declined (declination). The Request record contains the amount of money requested, the project description, the Coding Sheet used to classify the Request, and other information related to the tracking of the Request. Each Request record is associated with the Organization requesting funding and the Contact records for the individuals associated with the Request.

Folder	Description
Payments	Each approved Request has associated payment information. Each Payment record contains information about an individual payment, such as its status—Scheduled, Paid, or Void—its amount, the number of the check used to make the Payment, and so forth.
Documents	The Documents folder contains letters and write-ups produced in GIFTS that can be accessed for viewing and printing purposes. If you have the optional Document Manager, you can also attach documents produced outside of GIFTS.
	This folder is not available to Essential GIFTS users who do not have the Correspondence option.
Contacts	Contact records contain the name and address of a contact person, as well as relevant biographical data. A Contact's record can be *affiliated* with all of the Organizations and Requests with which he or she is involved.
	This folder is not available to Essential GIFTS users who do not have the Contact Manager option.
Activities	During your day-to-day work, you need to schedule and track a number of actions or pieces of information—like meetings, telephone calls, and site visits. GIFTS helps you schedule and track these events by logging some automatically and by allowing you to log others manually as they are needed. Activities can be related to Requests, Organizations, Contacts, or Payments.
	This folder is not available to Essential GIFTS users who do not have the Calendar / Activity Tracking option.
Requirements	Most grants have certain requirements—such as progress reports or site visits— that must be met to fulfill the terms of the grant and/or qualify the organization for future payments. These Requirements can be associated with a grant or with a specific Payment for a grant. Requirements can also be published to the Web for online reporting with IGAM.

For each type of record in the database, there is a chapter in this manual that provides complete data entry instructions.

The optional Budget Module and Employee GIFTS Modules each have their own folders in the Organizer. If you have either of these modules, their

folders are displayed on your system. For information about using these folders, please refer to the documentation for your optional modules.

The Organizer gives you one-touch access to any folder:

Click any of the *tabs* to view a folder. In this screen, the Organizations folder is being viewed.

No records are listed at first. You can click the Find button to look for the items you want.

Search Facilities

To work with your grant making information, you need a way to find the information you need without having to sort through irrelevant data. The Organizer has several search facilities that you can use to find what you need.

When you search for the information you want, the relevant records are displayed. Here, a user has gone to the Requests folder and searched for the

Requests assigned to Kelly Goldberg, a staff member within the user's grant making organization.

The headings indicate the type of information in each column. You can choose the columns that are displayed and customize their headings

The *status bar* displays the search criteria used so you always know what is listed.

A list of the records that you searched for is displayed in the Organizer *grid*. You can choose the *sort order* of the records.

You can save the searches that you plan to use again; in addition, the system automatically saves several of your most recent searches. For more information about the Organizer search facilities, please refer to "Overview of the Organizer Search Facilities" on page 82.

About the Organizer Grid

The area in which the Organizer lists the records in your database is known as the grid. Each row provides summary information about a database record, and each column displays of information from a specific field within the record, such as the Project Title of a Request.

Often, there are more columns than will fit on the screen—use the scroll bar at the bottom of the window to scroll to the right and view more information. If a search yields more records than will fit on the screen, you can use the scroll bar on the right of the window to scroll through the list of records.

Records are also color coded; the legend on the bottom of the window indicates the meaning of the color codes for the folder you are viewing. For instance, Requests are color coded to indicate whether they are Pending, Incomplete, Approved, or Declined.

By default, each folder displays the information you are most likely to need. However, you can customize the Organizer by choosing which columns are displayed in each folder, as described in "Working with the Organizer Columns" on page 49. For example, you could choose to display the Docket Number for Requests in the Organizer.

By default, records are sorted either alphabetically or by date; you can customize the sort order as well. For example, you can sort Requests by their Meeting Date, Creation Date, Program Area, and so forth. For more information about sorting records in the Organizer, please refer to "Changing the Organizer Sort Order" on page 61.

Ad Hoc Reports

From the Organizer, you can print ad hoc reports that include the records you've selected in the Organizer. You can use Organizer settings and Organizer *Views* to create sophisticated reports that group data—for example, you can group Requests by Program Area—and include subtotal amounts for each group.

For an example of an ad hoc report, please refer to "About Organizer Reporting" on page 500. For information about Organizer Views, please refer to "Using Organizer Views" on page 63.

Charts

In the Requests folder, you can chart summary data in a variety of formats, such as a pie graph or bar graph. For more information, please refer to "Charting Summary Information" on page 70.

Zooming on Records to Get Related Information

GIFTS organizes grant making information by maintaining associations between related records. In this way, you can easily retrieve and work with the data related to any record.

For instance, assume you are working with a Request record, viewing the date on which the grant was awarded and its Project Description. In

addition, you may need to access information related to the grant that is located in different Organizer folders.

Related Data	Description
Organization	New University
Primary Contact	James Tamus
Other Affiliated Contacts	Robyn James Barbara Wood
Payments	$5,000 due on 9/15/2000 $5,500 due on 2/15/2001
Documents	Write-up Award Letter
Activities	Site Visit on 12/15/2000 Meeting scheduled for 1/15/2001 Phone Call scheduled for 1/25/2001
Requirements	Progress Report due 1/1/2001 Financial Report due 1/1/2001 Final Report due 6/15/2001

You can zoom in on the Request record to automatically populate the other folders with the records that relate to that Request. Then, you can move from folder to folder, viewing the records relevant to the Request you zoomed in on.

In addition, the other Requests that met your original criteria are still displayed in the Request folder, so you can quickly zoom in on another Request or switch back and forth among a whole set of Requests at once. Likewise, you can zoom in on records in other folders.

In short, all the information shown in the table above—though it is contained in separate records in separate folders—can be retrieved using the zoom feature. For more information, please refer to "Using the Zoom Feature" on page 47.

Folder Toolbar

In addition to the Main toolbar located at the top of the screen, there is a Folder toolbar with tools that apply to the items within the current folder.

The tools displayed on this toolbar remain the same regardless of the folder that is currently active. However, tools are disabled when the options they represent are not available.

Button	Name	Description
	Find	Search for records within the active folder.
	Zoom	Zoom in on the highlighted record. The information in the other folders is updated to display only the information associated with the record you zoomed in on.
	New	Create a new record within the current folder (if you are in the Organizations folder, you will create a new Organization record, and so forth).
	Open	Open the highlighted record to edit or view it.
	Summary	Display a summary for the records displayed. Each folder has a summary designed to suit the information contained within it.

Working with Records in the Organizer

As you are working in the Organizer, you may want to learn more about the records with which you are working. This section describes how to select records, how to open them for viewing or data entry, and how to create new records. For detailed information about data entry, please refer to the chapter that details the type of record you want to work with.

Selecting a Single Record

To select a single record in the Organizer, click on it. The record is highlighted, indicating that it has been selected.

Selecting Multiple Records

You can select more than one record in order to perform the same operation, such as declining proposals, on all of the selected records at once. This is known as batch processing. You can also zoom on several records at once.

To select more than one record, hold down CTRL as you click on records. Each record you click on is highlighted, and you can de-select records by clicking on them again. You can also select a record, hold down SHIFT, and select another record to choose all of the records in between the two.

Selecting All Records

To select all of the records in the Organizer grid, you can do one of the following:

- click the right mouse button and choose Select All
- choose Edit ➤ Select All from the Main menu
- press CTRL+A

All of the records in the Organizer grid are highlighted. You can hold down CTRL and click on a highlighted record to de-select it, or hold down CTRL and click on any non-highlighted record to select it again.

Opening a Record

You can open any record to view or edit its data. To open a record:

1. Select the record in the Organizer grid.
2. Use any of the following means to open the record:
   - ❖ Double-click on the record.
   - ❖ Click on the Open button on the Folder toolbar.
   - ❖ Choose File ➤ Open from the Main menu.

   The record is opened.

Opening a "Locked" Record

If a Request, Organization or Contact record is being modified by a user, it is "locked" so that you are able to open and view the record, but not make changes. Once the first user closes the record, you may again have full access to it.

When you attempt to open a locked record, a message will display telling you the name of the user who has the record locked. At this point you have several options:

- ❖ **Try Again** will attempt to open the record again. If the other user has since closed the record, it will open and you will be able to modify it according to the permissions that have been defined for you. If the record is still being modified by the other user, you will be returned to the same message again.
- ❖ **View Only** will open the record for viewing, but you will not be able to make any changes.
- ❖ **Cancel** will return you to the Organizer without opening the record.

Important: After the first user closes the record, you will need to close your view-only version and reopen the record before you can have full access.

Note: This feature takes into account the permissions that have been defined for GIFTS. If a user with view-only permissions opens a record, other users

will not be prevented from modifying it. Likewise, users with view-only permissions will never see a message that the record cannot be modified, since their permissions do not allow them to do so in any case.

Creating a New Record

From within any folder, you can create a new database record. To create a new record, just click the New button on the Folder toolbar. A blank record is created and opened.

As an alternative, you can choose File ➤ New from the Main menu, and then choose a record type from the submenu.

Using the Zoom Feature

The Organizer is designed to give you the easiest access to as much information as possible. One of the main ways it does this is with the zoom feature. When you *zoom in* ("focus") on a record or group of records, the Organizer automatically updates all of the information in the other folders with the information related to that record or records.

Then, you can then simply click back and forth between the different folders, viewing and accessing information as necessary. You can zoom in on other records whenever you like. "Zoom Example" on page 48 demonstrates how to use this feature to your best advantage.

Zooming in on Records

To zoom on a record or group of records:

1. In an Organizer folder, select the record or group of records you want to zoom in on. (For information about selecting multiple records, please refer to "Selecting Multiple Records" on page 45.)

2 Choose File ➤ Zoom from the Main menu or click the right mouse button and choose Zoom from the popup menu.

The text in the first column of the record or records is changed to italic type to indicate that you have zoomed.

Zoom Example

In this example, a user zooms in on an Organization called the Brooklyn Ballet and then browses through its related information. Then, the user zooms in on one of the Contacts for the Brooklyn Ballet, demonstrating how you can navigate through your grant making data with this feature.

1 With Quick Find, the user searches for and views the Arts & Culture Organizations in her database. Three Organizations are found.

2 The user highlights the Brooklyn Ballet and clicks the Zoom button.

After you click the Zoom button, the name of the Organization is displayed in italic type to indicate that you have zoomed on it.

3 The user goes to the Requests folder. Since she is zoomed in on the Brooklyn Ballet, all of the Requests for this Organization are displayed.

Tip: When you move between folders while zoomed in on a record, the zoom is saved as a recent search. In this example, "Requests for 'Brooklyn Ballet'" would be saved as a recent Requests folder search. For information

about using recent searches, please refer to "Using Recent Searches" on page 101.

4 She goes to the Contacts folder. All of the Contacts for the Brooklyn Ballet are displayed.

5 The user zooms in on Margaret Neff, Executive Director of the Brooklyn Ballet. The other folders are now populated ("filled") with information related to Ms. Neff.

6 She returns to the Organizations folder, which now displays the Organizations with which Ms. Neff is associated.

7 The user zooms in on the Model Foundation. Now, the other folders are populated with information regarding this Organization.

Working with the Organizer Columns

By default, each folder of the Organizer includes the information needed by many grant makers.

You can choose a variety of columns to be displayed in each folder, and remove columns that you don't need. The available columns include most of the information contained in the GIFTS database. For example, here is a customized Requests folder.

To customize the columns to be included in the Organizer:

1 Go to the Organizer folder that you want to customize.

2 From the Main menu, choose View ➤ Show Columns.

From this window, you can:

- Add columns to the Organizer
- Edit the Organizer column headings

- Specify the format—such as font, font color or justification—of the data in each column and change the order (from left to right) in which the columns are displayed in the Organizer
- Remove columns from the Organizer
- Combine columns, displaying the data they contain in a single column
- Reset the default columns

Tip: You can save your column settings, including the width of each column, as part of an Organizer *View*. For more information about Views, please refer to "Using Organizer Views" on page 63. For information about adjusting the width of the columns in the Organizer, please refer to "Grid Displays" on page 22.

Adding Columns to the Organizer

You can choose columns from the Available Columns list and add them to the Organizer grid. Each available column will display a specific piece of information; the available columns are divided into the categories of information that they represent.

Example: The columns available in the Payments folder are divided into categories such as 'Request's Coding Sheet'—which includes information from the Coding Sheet of the Request to which the Payment belongs—and 'Payment,' which includes information about the Payment itself.

You can use the list at the bottom left of the screen to choose a category of information. Note that the 'Defaults' category always lists the default columns provided with GIFTS.

To add a column to the Organizer grid:

1. Go to the Organizer folder that you want to customize and choose View ➤ Show Columns from the Main menu.
2. Choose a category of information from the list on the lower left. The available columns for that category are displayed.

3 Highlight a column and click Include to add it to the Organizer grid. It is displayed in the list on the right of the screen. Note that the column name is preceded by the name of its category. For instance, 'Grantee Organization: Tax Notes.'

4 Refer to the following sections for information about editing the column heading, formatting the column, and adjusting the width of the column.

Editing Column Headings

To edit the columns displayed in the Organizer:

1 Go to the Organizer folder that you want to customize and choose View ➤ Show Columns from the Main menu.

2 In the column grid, select the column whose heading you wish to change. Then place your cursor in the Column Heading field of the Formatting section. The insertion point (cursor) is displayed within the header's text.

3 Edit the heading. (You can click the right mouse button to access standard Windows editing functions like Cut and Paste.)

Tip: To create a heading with more than one line of text, press ENTER to enter a line break (carriage return).

Formatting a Column

Each column displayed in the Organizer grid can be customized with its own font, font color, alignment, and other formatting options. To format a column:

1 Go to the Organizer folder that you want to customize and choose View ➤ Show Columns from the Main menu.

2 In the column grid, select the column you wish to format. The buttons in the formatting toolbar become available:

Note: You can select multiple columns and format them at the same time. For information on selecting more than one item, please see "Selecting Multiple Records" on page 19.

3 Use the formatting toolbar to customize the column. You can select font, font size, and font color. Text within the column can be aligned to the left, right, or center. You can also format column text to be bold, italicized, and/or underlined.

4 For some data, the following additional options are available in the Formatting section of the Show Columns window:

❖ **Dates**—You can choose a date format from a list of standard formats.

- **Currency**—You can set the following options:

Option	Description
Decimal places	Indicates the number of decimal places to display, from 0–4.
Negative number format	Indicates the format for negative numbers from: ❖ -$1,000.00 ❖ ($1000.00) ❖ $1000.00 [the positive number format indicated by your Windows regional settings]
Display negative values in red	Indicates whether negative values should be displayed in a red font.
Don't display currency symbol	Indicates whether or not the applicable currency symbol should be displayed.
Include grouping character	Indicates whether or not the appropriate grouping character (e.g., the comma in $1,000.00) should be displayed. (Note: The grouping character is determined by your Windows regional settings.)

- **Coding Sheets**—For multiple-level tables, you can set the following options:

Option	Description
Code level to display	Indicates the number of code levels to display, from 1–5.
Show parent codes	Indicates whether the entire coding hierarchy should be displayed, rather than just the code from the selected level.
Delimiter between levels	Indicates the delimiter (i.e., separator) to be used between code levels. Select a delimiter from the drop-down list or supply another.
Primary/Secondary Codes	Indicates whether the display should include primary codes, secondary codes, or both.
Delimiter between codes	Indicates the delimiter to be used between multiple codes. Select a delimiter from the drop-down list or supply another.
Display Code/ Description	Indicates whether the display should include the Code value, the Description value, or both. *(For details on system coding, please refer to the GIFTS Administrator's Guide.)*

Option	Description
Display Percentages	This option is only available for percentage code enabled code tables. It will display the code(s) selected for the Request and it's corresponding percentage in parenthesis in the column.

Example: If you choose three levels and a back slash as the delimiter, the Geographical Area Served of a Request might be displayed as 'Northeast\New York\New York City.' If you choose to display *two* levels with the same delimiter *and* to include the secondary code delimited by a comma, the same Request's Geographical Area Served might be displayed as 'Northeast\New York,Northeast.'

- **Numbers**—You can set the following options:

Option	Description
Decimal Places	Indicates the number of decimal places to display, from 0–4.
Include grouping character	Indicates whether or not the appropriate grouping character (e.g., the comma in 1,000.00) should be displayed. (Note: The grouping character is determined by your Windows regional settings.)

- **Element of a Combined Column**—If you have selected one element of a combined column, there is a "Trailing Delimiter" option added to any other options that may be available. This option allows you to indicate the delimiter to use after the selected element in the combined column.

- **Calculated Values**—A number of columns display calculated values (e.g., "Last Grant Date" in the Organizations folder). The following options are available for these columns:

Option	Description
Decimal places	Indicates the number of decimal places to display, from 0–4.

Option	Description
Negative number format	Indicates the format for negative numbers from: ❖ -$1,000.00 ❖ ($1000.00) $1000.00 [the positive number format indicated by your Windows regional settings]
Don't display currency symbol	Indicates whether or not the applicable currency symbol should be displayed.
Search Criteria	*Read-only.* Displays the search criteria that are currently applied to the column. To add a search or change the current search, click Edit/New Search in the toolbar.

5 *Optional*. If you are formatting a calculated value column and you wish to add a search or edit the existing search criteria, click Edit/New Search in the toolbar. The Quick Find form for the appropriate record type will open.

If you would like to apply a saved Search to a calculated value column, click Select Search. The Saved Searches form for the appropriate record type will open.

Moving a Column

To determine the order (from left to right) of the columns in the Organizer, you can do one of the following:

❖ Access the Show Columns form and select the column you wish to move in the column grid. Use the Move Up and Move Down buttons to change the position of the column.

❖ While viewing the appropriate folder of the Organizer, find the column you wish to move. Click and drag the column to a new position within the Organizer folder.

Adjusting the Width of a Column

To adjust the width of a column:

1 Move the pointer to one of the vertical lines between column headers at the top of the Organizer grid. The pointer changes to the re-size tool.

2 Click and drag the line to increase or decrease the width of the column.

3 When the column is the appropriate size, release the mouse button.

Removing a Column from the Grid

To remove a column from the Organizer:

1 Go to the Organizer folder that you want to customize and choose View ➤ Show Columns from the Main menu.

2 In the column grid, select the column you wish to remove. An arrow indicates that you have selected it.

3 Click Remove. The column is removed from the list, and will not be displayed in the Organizer.

Resetting the Grid Columns to the Defaults

While working with the columns and their headings, you may decide that you'd like to start from scratch, or that the default settings are the most appropriate for your needs. At any time, you can revert the columns, column headings, and column formatting to the defaults by clicking Reset Defaults.

Working with Combined Columns

Combining columns in the Organizer allows you to maximize the amount of data displayed on the Organizer screen. When columns are combined, data from each column is listed line by line in a single column. This can be particularly helpful when you are printing ad hoc reports.

In the Requests folder shown below, columns for Grantee Organization's name, Request ID, and the Request's Project Title have been combined in a single column:

The column headings are also combined, indicating the order in which the data appears within the column.

Combined columns can be edited, formatted, moved, and resized like regular columns. You can also separate one or more (or all) columns after combining them.

Combining Columns

To combine columns:

1 Go to the Organizer folder that you want to customize and choose View ➤ Show Columns from the Main menu.

2 In the column grid, select the columns you wish to combine.

Click this button once you have highlighted the columns you want to combine.

Hold down the CTRL key as you click on each column you want to combine.

3 Once all columns you wish to combine are highlighted, click the Combine button. The columns are combined:

The column number indicates that these three elements have been combined to form one column.

Each element in the combined column maintains a row of its own in the Show Columns grid, as shown above. You will note, however, that each element in the combination shares the same column number. This indicates the column in which the combined information will appear.

Considerations when Combining Columns

The following list points out certain "behaviors" of the combining feature. These should be taken into consideration before combining columns.

- When columns are combined, they take the position previously occupied by the highest selected column.

For example, if you selected Columns 2, 4, and 7 and clicked Combine, the combined column would become Column 2. The three elements are now listed together in order between Columns 1 and 3. The other columns are renumbered accordingly.

- Combined columns can be moved the same way as regular columns. Click any one of the elements that comprises the combined column and click Move Up or Move Down. The entire column will move as one.
- You cannot move individual elements up and down within a combined column. To change the order of elements within a combined column, you must separate the columns, use the Move Up and Move Down buttons to change the order, then re-combine them.
- To format a combined column, highlight any element of the column in the grid and make your changes. The formatting (font size, alignment, etc.) will apply to all elements of the column.
- A column which includes a graphic (e.g., the Alert Status column, which contains the exclamation point icon) cannot be combined with another column.

Separating Columns

To separate elements from a combined column:

1. In the column grid, select the element you wish to remove from the combined column. If you are removing more than one, press CTRL as you click them.

Click this button once you have highlighted the columns you want to separate.

2 Click Separate. The column is separated and placed in order just below the combined column. The Column numbers change accordingly.

The Request ID column, once part of the Column 3 combination, is separated and becomes Column 4.

Changing the Organizer Sort Order

By default, records in the Organizer are sorted either alphabetically or by date. For example, Organizations are sorted alphabetically and Payments are sorted according to their Scheduled date. You can sort records based on a number of properties—such as the Program Area of Requests—and choose whether the sort order is ascending or descending.

In case two or more records have the same value in the sorting property—for instance if you are sorting Requests by Grant Amount and several of your grants are for $5,000—you can set as many as four secondary sort properties.

Tip: When you print data from the Organizer as an ad hoc report, you can group and subtotal the data by the sorts you've chosen in the Organizer. For example, if you sort Requests by their Program Area classification, your ad hoc reports can include subtotals for each Program Area.

Note that the sort order only determines the order in which records are displayed; it does not affect the search criteria used to determine which records are displayed in the Organizer.

Example: If you sort Requests by their Grant Amount, you are not excluding Pending Requests and Declined Requests (which do not have a Grant Amount) from your Organizer searches. They are sorted as if their Grant Amount were zero.

To change the sort order for an Organizer folder:

1 Choose View ➤ Show Sorts from the Main menu.

Records are first sorted by the primary sort column specified here. If two or more records have the same value (such as a Program Area or Request Amount) in this column, they are then sorted according to the secondary sort columns below.

2 Choose the *primary sort column*. The available columns are divided into the categories of information that they represent.

Example: The columns available in the Requests folder are divided into categories such as "Coding Sheet"—which includes information from the Coding Sheet of the Request—and "Request," which includes information about the Request itself.

The Organizer will sort records according to the values in the column that you choose. For example, if you choose the Request Amount column and click Ascending, the Request with the smallest amount would be listed first, and the one with the largest would be listed last.

To choose a sort column, first choose the category to which it belongs; only the columns that belong to the category you choose are available in the Column list. Note that there is always a 'Defaults' category, which lists the default column that GIFTS uses to sort records. Then, choose whether you want the sort order to be ascending or descending.

3 Choose *secondary sort columns*, as desired, and specify whether they are ascending or descending sorts. Groups of records that have the same value in a sort column will be sorted according to the next secondary sort column.

Example: If you chose "Coding Sheet: Program Area" as the primary sort column for Requests, GIFTS uses the next secondary sort column to sort all of the Requests that share the same Program Area.

4 Click OK to save the new sort order for the folder that you are in.

Using Organizer Views

Organizer Views allow you to combine and save Organizer display settings—including column headings, column widths, sorts, saved searches, and printing options. By applying the Views that you've saved, you can quickly access the data you need in the most appropriate format. You can even use Organizer Views for running *ad hoc reports*.

Note: If you are running a full version of GIFTS, you will have a number of advanced formatting options available for printing and saving ad hoc reports. Using Views for reporting will limit your ability to customize your reports. For details on advanced reporting options, refer to "About Organizer Reporting" on page 500. Essential GIFTS does not include advanced reporting options, and users should rely on saved Views for their reporting needs. For details on ad hoc reporting from Essential GIFTS, refer to "Reporting in Essential GIFTS" on page 119

About Organizer Views

GIFTS maintains a separate list of saved Views for each Organizer folder, plus a Favorites list of your most often used Views (as defined by each user). Each saved View contains the display settings selected by the user in the Organizer.

You can save the following settings with your Views.

- **Column Settings:** You can choose a variety of columns—such as Project Title and Program Area—to be displayed in each Organizer folder, and

remove those columns you don't need. You can also edit the headings of the columns, adjust the width of each column, or even combine columns to save space.

- **Organizer Sort Order:** By default, records are sorted either alphabetically or by date. For example, Organizations are sorted alphabetically and Payments are sorted according to their Scheduled date. You can sort records based on a number of properties—such as the Program Area of Requests—and choose whether the order is ascending or descending.
- **Saved Searches:** Organizer Views can include saved Searches, such as "Pending Requests for this Quarter."
- **Print Setup:** You can save the justification (left, right, or center) and fonts that you wish to use for the headers and data when you print data from the Organizer as an ad hoc report. In addition, you can specify how the report is grouped and whether it includes subtotals and totals.

Example: In the Requests folder, you can create a View that sorts records by their Program Area and that includes a saved Search for the current quarter's pending Requests. Then, you'll be able to print ad hoc reports that show your current proposals grouped by Program Area, including subtotals for each Program Area.

Tip: Organizer settings (show columns, sort orders) can be used to create ad hoc reports, as described in "Setting Up and Running Ad Hoc Reports" on page 120. GIFTS users have additional wide-ranging formatting and organizing options available in their ad hoc reporting; for details, please see "About Organizer Reporting" on page 500.

Public vs. Private Views

When you save a new Organizer View, you have the option to make it public or private. Private Views will only be available to you for viewing, editing and reporting. Public Views will be available to all other GIFTS users for viewing and reporting. Users with the appropriate permissions may also edit a View that you have made public. While public Views can be very

convenient for rolling out an ad hoc report format to multiple users, they can also cause change control problems if too many users have edit permissions.

Tip: Keep private copies of important public Views so you can quickly run reports without having to check for unwanted changes each time. If you copy a View with a public Search attached, save a private copy of the Search as well and apply it to the private View. If you ever need to share a private View with other users, simply save a public copy instead of making the original View public.

Creating or Editing an Organizer View

Tip: Whenever you want to save your current Organizer settings as a View, choose View ➤ Save Current View from the Main menu. Then, you can use this procedure to make any necessary changes.

To create an Organizer View:

1. Go to the Organizer folder for which you wish to create the View.

2 Choose View ➤ Apply/Edit Views from the Main menu.

The column settings, sorts, and searches that you define for the View are displayed here.

If no sort order or Search is associated with this View, these two fields will read "<None>."

3 Click New to create a new View or highlight a View in the list and click Edit.

Check this box to allow other GIFTS users to use your new or edited View.

Note that if you check this box after adding a non-public search to the View, a message will appear asking you if you want to make the search public as well. You cannot save a public View unless the associated search is also public. (Of course, you can save a View without a search as well.)

4 To edit the column settings of the View, click the Columns button in the toolbar, or select Tools ➤ Columns from the View menu. The column options are displayed, as described in "Working with the Organizer Columns" on page 49.

5 To edit the sort order of the View, click the Sort button on the toolbar, or select Tools ➤ Sort from the View menu. The sort options are displayed, as described in "Changing the Organizer Sort Order" on page 61.

6 To apply a saved search to the view, choose Tools ➤ Search ➤ Select Search from the View menu and choose a search, as described in "Using Saved Searches" on page 101.

Important: If you have selected the 'Allow other users to use this search' check box, only public saved Searches will be listed. If you have not made this View public, you can select from both public Searches and your own private saved Searches.

7 If you are running Essential GIFTS, you can set the printing options by choosing Tools ➤ Print Setup from the View menu and set the options as described in "Essential GIFTS Print Options" on page 122.

Tip: Be sure to set the sort options for the View before you set the print options. The available grouping options for printing are dependent upon the sort options for the View.

8 Click Save and Apply to return to the Organizer.

9 Adjust the width of the Organizer columns, as described in "Adjusting the Width of a Column" on page 57.

10 From the Main menu, select View ➤ Update Current View to save the column width settings as part of the View. GIFTS notifies you that the View will be updated, noting that column selections and settings, sort selections, and (if a saved Search is associated with the View) search criteria will be updated. (If something such as search criteria has not been changed, the old settings will remain.)

11 Click Yes to continue. The View is updated.

Applying an Organizer View

To apply an Organizer View:

1 Go to the Organizer folder to which you wish to apply the View.

2 Choose View ➤ Apply/Edit Views from the Main menu. If you have added the View to your Favorites list, go to the Favorites tab. Otherwise, go to the Saved Views tab. A list of the Views for the folder is displayed.

3 Highlight the View and click Apply View. The View is applied, and you are returned to the Organizer.

Deleting an Organizer View

To delete an Organizer View:

1 Go to the Organizer folder for which you wish to delete the View.

2 Choose View ➤ Apply/Edit Views from the Main menu. A list of the Views for the folder is displayed.

3 Highlight the View and choose File ➤ Delete from the View menu. The View is deleted.

Percentage Coding for Request Views

Percentage Coding can be displayed in custom Request Views by doing the following: .

1 In the Requests folder of GIFTS Organizer, go to View > Show Columns to open the Columns window.

2 For Select available columns from, select Coding Sheet.

3 Add the percentage coding enabled code table to your columns view list.

4 It is recommended to set the column display to Primary and Secondary if you have multiple percentage codes for each request.

5 Check the box for Display percentages.

6 Click Save and Close to see your new View.

Below is a sample of how Percentage Codes are displayed with Primary and Secondary codes set.

Viewing Summary Information

With one click of the Folder toolbar's Summary button, you can generate and view summary data for the records displayed in the Organizer grid. The type of information generated is dependent on the folder that you are in. For instance, here is the summary data for the Activities folder.

The Organizations, Requests, and Payments folders display a more detailed summary, which also contains an option to create charts. The Requests summary below shows the format of these more detailed summaries.

You can click Print to print the summary. You can also create a chart from the summary data, as described in the net section.

Charting Summary Information

GIFTS can create a chart of summary data in the Organizations, Requests, or Payments folder of the Organizer. For each folder, appropriate kinds of data are available for charting. You can also choose the categories you want the data grouped by.

Important: The data in the chart comes only from the Organizations, Requests, or Payments currently displayed in the Organizer.

Creating a Chart

To generate a chart of the summary data:

1 Use the Quick Find or Advanced search to select the Organizations, Requests, or Payments you want to chart. The records are displayed in the Organizer grid.

2 Click the Summary button. The charting options are displayed at the bottom of the summary window.

3 Click the Chart Type button. Select the way you want the data grouped, and then click OK.

Chart Type options differ according to the Organizer folder you are working in. The table below lists each folder's data category options:

In this folder...	Data can by sorted by...
Organizations	Any level of any Code Table in the Organization Coding Sheet.
Requests	Staff member, type of Request, Request date, or grant approval date. Any level of any Code Table in the Request Coding Sheet.

In this folder...	Data can by sorted by...
Payments	Payment status, Payment type, fund, type of support, G/L account, wire transfer status, or fiscal year. Any level of any Code Table in the Payment Coding Sheet.

Important: If you use a Code Table to group your data, a category called "No Code Specified" will contain data for which the specified code is not entered. For example, if you create a chart showing grant amounts grouped by entries in the Code Table "Geographical Area Served," grants for which no Geographical Area Served code was entered will be grouped together under the "No Code Specified" category.

4 Choose the Data Value that you want to be reflected in the chart. The drop-down menu will list chartable data appropriate to the Organizer folder with which you are currently working.

For example, if you were working on a summary of records in the Requests folder, your Data Value options would include 'Request Amount' and 'Recommended Amount,' among others.

5 Click Chart. A chart is displayed.

Click the Copy to Clipboard icon and select "As a Bitmap" to copy the chart to the Windows clipboard as a bitmap file.

From there, you can paste it into a document or spreadsheet.

Percentage Coding for Organizer Charts

To include percentage coding values in your Summary Charts do the following:

1. Go to the Requests folder.
2. Modify the view as desired to show only the Requests you desire to chart.
3. Click the Show Summary button to open the Summary window.
4. Review the summary data on top to be sure you have the correct requests selected.

5. Click the Chart Type button and select a percentage coding enabled Code Table and level.
6. Data Value must be set to Request Amount or Grant Amount.
7. Check the box for Include Secondary Codes/Percentages.

8 Click Chart to preview your new chart and make modifications if desired.

For more details on Formatting Summary Charts, please refer to "Formatting a Chart" on page 74.

Formatting a Chart

You can use the tools on the Chart toolbar to customize the chart.

Icon	Name	Description
	Gallery	Click the Gallery icon to choose a type of chart, such as pie, line, area, or column.
	Color	To change the color of a chart element, first click the Color icon and choose a color from the palette. Then click on the icon again, hold down the mouse button, and drag the color to the element you want to change.
	Legend Box toggle	Click the Legend Box icon to toggle between displaying and hiding the chart legend.

Icon	Name	Description
	Properties	Click the Properties icon to access many chart options, including the color palette and gallery type.
	3D/2D	The 3D/2D icon toggles between graph elements being shown in three dimensions or two.
	Edit Title	Click the Edit Title button to change the title of your chart.
	Fonts	Click the Fonts button to select the text you want to format (Left title, y-axis labels, and so on). The font window will open and you can format the selected text as you wish.
	Tools	The Tools icon is another way to access Chart formatting options, including the Values Legend toggle and the Data Editor.
	Help	Open the ChartFX online help and learn about other formatting options.

To edit the chart title, right click on the title and select Edit Title from the menu, as shown below:

Editing Chart Data

After you have created a chart, you can edit the data shown. Click the Data Editor icon on the chart toolbar. The data table opens within the chart window:

	Colette Rogers	Admin	Lee Williamson	Terry Brown	Sarah Sullivan
1	122250.00	10200.00	38050.00	1200.00	30700.00

Double click on the data value you want to edit. Your cursor now appears in that table cell, allowing you to change the value. Then press Enter to refresh the chart to reflect the new data.

Note: Adjusting data in the chart's Data Editor *will not* affect the data stored in GIFTS. If you make changes in the Data Editor, close the chart, then recreate the same chart, your previous changes to the data will not appear.

Changing to another Chart

You can change your chart to reflect a different chart type and/or data value without closing the chart.

The Summary window, where you choose your chart options, remains open after you create a chart. (You may need to move your chart to one side of the screen to see it.) In the Summary window, change the chart type and/or data value, and then click Chart. The chart window remains open, but displays the new chart instead.

Tip: When you are finished with a chart, be sure to close it ( ) instead of minimizing it ( ) to conserve your computer's memory.

Refreshing the Organizer Grid

As you are searching for and working with records in the Organizer, the system continuously refreshes the display so that recent changes to your data are reflected. There are two ways in which you can influence the way the system refreshes your data:

- Set the refresh mode
- Manually refresh the Organizer grid

Setting the Refresh Mode

The standalone and file server editions of GIFTS give you two options to determine the way you wish the system to refresh the Organizer display as you work. You can choose to refresh the selection of records in the folder, or choose to refresh the data in the folder. This option is not available for client/server editions of GIFTS, which refreshes by selection only.

To Set the Refresh Mode:

1. From the Main menu, choose Options ➤ Refresh Selection or Options ➤ Refresh Data. The refresh mode is set to the item you chose.

Example: You search for and are viewing all of your Requests with a disposition of Pending. You open a Request, decline it, and save it.

- If the refresh mode is set to Refresh Selection when you save the Request, it will disappear from the Requests folder because your search is for all requests with a disposition of Pending, and this Request now has a disposition of Declined. GIFTS has refreshed the display based on the selection criteria.
- If the refresh mode is set to Refresh Data, the Request remains in the folder and its disposition is updated to Declined. Although it does not meet the criteria specified by your original search ("Disposition is Pending"), it remains in the Organizer.

Manually Refreshing the Grid

If recent changes you have made to the system are not reflected in the display and you suspect that the system has not refreshed, you can manually force GIFTS to refresh your data.

In any Organizer folder, click the right mouse button and choose Refresh, or choose Edit ➤ Refresh from the Main menu. The display is refreshed.

Refreshing System Settings

If your administrator makes any changes to codes or settings while you're logged into GIFTS, you'll need to refresh your system before the changes will be available. To refresh any code or setting changes, choose Options ➤ Refresh System Settings from the Main menu. GIFTS may also be refreshed by logging out of the system, then logging back in.

Clearing the Organizer Grid

In some cases, you may wish to clear the Organizer folders of the records currently displayed. To clear the Organizer, choose Edit ➤ Clear from the Main menu, or press CTRL+L. All of the records in the Organizer, including those within the hidden folders, are cleared.

The Clear command does not delete records from the system; it merely clears the display.

4 Searching for Data in GIFTS

The Organizer is an advanced information management tool that allows you to search for and work with your grant making data with a minimum amount of effort. This chapter describes how to use the Organizer to search for and view your grant making data.

In This Chapter

Overview of the Organizer Search Facilities **82**

Using the Quick Find Search **85**

Refining a Quick Find Search **89**

Quick Find Property Type Reference **93**

Using Recent Searches **101**

Using Saved Searches **101**

About Advanced Searches **108**

Complex Search Example **111**

Running an Advanced Search **113**

Overview of the Organizer Search Facilities

Before you can work with your grant making data or run reports, you need to find the relevant information. The GIFTS search features allow you to create a set of search criteria that tell the system exactly what you are looking for. These criteria are sent to your database as a search query, and the system retrieves the information you requested.

This section introduces the search facilities and the "wildcard" and "missing data" search options. For detailed instructions on searching, you can refer to:

- "Using the Quick Find Search" on page 85 explains how to create and refine Quick Find searches.
- "Using Saved Searches" on page 101 explains how you can save the searches you've created so that you can use them later and make them available to other users.
- "About Advanced Searches" on page 108 explains how to plan a complex search, and how you can use the Quick Find and Advanced searches to implement it.

Phone Book Search

In the Organizer folders, you can quickly search for Contacts whose last name begins with a given letter or for records associated with the Organization names that begin with a given letter. To run this type of search, just go to an Organizer folder and press the key for any letter. To display all of the records in the folder, enter an asterisk (*).

Note that if your administrator configures your system to use the extended alpha search feature described in the following section, phone book searches are not available.

Extended Alpha Search

If your administrator has enabled the extended alpha search capabilities option, you can initiate a name search in any Organizer folder by pressing a

letter on the keyboard. For example, if you press the letter "U" in the Contacts folder, the following dialog is displayed.

You can edit the name search and click Find Now to run the search. The name that is searched depends on the folder from which you initiate the search.

In this folder	GIFTS searches by
Organizations	Name
Contacts and Donors	Last name
Requests	Grantee Organization
Payments	Payee Organization
Requirements, Activities, Documents, Matching GIFTS, and Volunteer GIFTS	The related Organization

Note: When you initiate a name search, GIFTS will automatically apply your entry to either a "begins with" search or a "contains" search, depending on how your administrator has set up your system. One exception is that when you are in the Contacts folder, GIFTS will *always* run a "begins with" search.

Quick Find Search

The Quick Find search is an easy-to-use, "plain English" interface to the database that helps you create sophisticated queries to retrieve the information you want.

There is a Quick Find window available for each folder in the GIFTS Organizer. The Quick Find is different for each folder, concentrating on the most pertinent information for each record type.

Advanced Search

Some queries are too complex to run with Quick Find. You can build them with the Advanced Search feature, or create part of the query using Quick Find and then finish it with the Advanced Search.

The Advanced Search can query almost any field within the GIFTS database. Although the user interface helps you create your query, you'll need a good understanding of database searches to create complex queries.

Wildcard Characters

Both the Quick Find and Advanced Search support the use of an asterisk (*) as a wildcard character. A wildcard character takes the place of one or several fixed characters in a text string (like an Organization name).

For instance, you may want to search for "Theater of Brooklyn," but you can't remember if they use "Theater" or "Theatre." With the wildcard character, you can search for "Theat* of Brooklyn," and be sure to find the Organization either way.

Note: The client/server versions of GIFTS use the percentage sign (%) instead of the asterisk (*) as the wildcard character.

Searching for Missing Data

In the Quick Find search, you can search for records that are missing a specific property, such as "Recommended Amount" or "Program Area." While you create your search, you are given the option to choose "<is Missing>" as the value you are looking for.

Example: Choose "<is Missing>" from the following list of staff members to search for the Requests in your system that are not assigned to a member of your staff:

Using the Quick Find Search

The Quick Find search allows you to create sophisticated search queries to find the information you need. Queries are made up of one or more search expressions that describe the information you are looking for, such as 'Request Disposition is Approved.'

For searches that use more than one expression, Quick Find automatically joins the expressions (using the conjunctions AND or OR). You can refine searches by adding, editing, or removing search expressions.

You'll find that most of your searches are easy to create with the Quick Find's intuitive interface, but if you have never used a search engine before you can refer to "Search Terminology and Techniques" on page 108 for more information about computer-based search concepts.

This section describes how to:

- Create a Quick Find search
- Refine a search by adding, editing, or removing expressions
- Work with your last search query
- Set a default search dialog

❖ Search for records with missing data

In addition, "Quick Find Property Type Reference" on page 93 is a reference section you can refer to after learning about Quick Find searches. "Printing the Syntax of a Search" on page 93 describes how to print the syntax of your search query when you need assistance from MicroEdge Technical Support.

Creating a Quick Find Search

The following procedure demonstrates the Quick Find search by describing how to find approved Requests in the Program Areas of Dance or Opera:

1 Go to the folder in which you wish to search. In this case, we are searching in the Requests folder.

2 From the Main menu, choose Edit ➤ Find to open Quick Find. (You can also click the right mouse button and choose Find from the popup menu.) The Quick Find form for the Requests folder is displayed.

The Quick Find window is a Smart Form.™ To change the size and position of this window, you can click any border and drag it to the appropriate place; GIFTS remembers the size and position between your GIFTS sessions.

Note: If there are search expressions in the Quick Find form, you can click New Search to clear them.

Each property listed with an option button is a piece of information that you can use in your search. For example, the 'Board Meeting Date' and 'Project Description' are properties of Requests.

3 Click on a property, such as Disposition. You are prompted to complete the search expression that will describe what you are looking for. For instance, the expression 'Disposition is Approved' describes a specific set of records.

Note that the procedure for forming an expression varies depending upon the nature of the property you choose. ("Quick Find Property Type Reference" on page 93 details the property types and how to create expressions with them.)

4 Complete the expression by clicking Is and the disposition Approved from the list. Now, you have specified all the information needed to build the expression "Disposition is Approved." Click OK. You are returned to the Quick Find form:

Tip: As soon as you have added all of the search expressions you need, you can click the Find Now button in any of the property dialogs to run the search.

5 Now you'll specify the Program Area of either Dance or Opera. Since the Program Area property is stored in the Request's Coding Sheet, click the Coding Sheet property. The standard form for entering Coding Sheet information is displayed.

6 Highlight Program Area and click Add. You are prompted to choose Program Area classifications.

7 Specify the classification codes you are searching for:

- Highlight Opera and click Insert.
- Highlight Dance and click Insert.
- Choose File ➤ Close.

The codes are displayed on the Coding Sheet:

8 Click OK. You are returned to Quick Find, and your search expressions are displayed.

Note that the Program Area expression automatically uses the conjunction OR between Classical and Dance and Performance Art, and

that the entire expression is displayed as a single item in the Quick Find grid. Also, note that GIFTS automatically inserts the conjunction AND between the expressions in order to join them.

9 Click Find Now to initiate the search. If there are records that match your search criteria, they are displayed in the Organizer. If no records matched your search criteria, you are given the option to refine your search.

Refining a Quick Find Search

If your search did not result in the information you need, you can refine the search at any time. For example, if your search did not yield any matching records or you did not retrieve the record you want, you can delete a search expression to broaden your search.

The following sections describe how to refine a Quick Find search, and how to set up various options and defaults that can maximize the efficiency of your searches.

To Add an Expression

1 Open Quick Find. If the search criteria you used previously are not displayed in the Quick Find grid, click Last Search to retrieve them.

2 Click on another property, and complete the search expression. (For a detailed reference of how to build Quick Find expressions, please refer to "Quick Find Property Type Reference" on page 93.)

3 Click OK. You are returned to Quick Find.

4 If the expressions in the grid reflect your revised search, you can click Find Now to initiate the search. The results are displayed in the Organizer or, if there are no matching records, you are given the option to refine your search.

To Edit an Expression

In this example, assume you just searched for grants of $20,000 or more to organizations located in West Virginia, and now you wish to search for

grants of $20,000 or more made to organizations in Kentucky. Rather than building a new search from scratch, you can edit your original search as follows:

1. Open Quick Find. If your previous search is not displayed, you can click Last Search to retrieve it.
2. To change the Organization State expression, highlight it and click Edit. You are prompted to revise the expression.
3. Enter 'KY' as the state and click Find Now to initiate the search or OK to return to Quick Find.

To Delete an Expression

1. Open Quick Find. If your previous search is not displayed, you can click Last Search to retrieve it.
2. Highlight the expression you wish to delete.
3. Click Delete. The expression is no longer displayed in the Quick Find form.

To Start a New Search

1. Open Quick Find. If the previous search is displayed, you can click New Search to clear it.

Tip: You can choose Options ➤ Show Last Query in Quick Find from the Main menu to determine whether or not your most recent search is displayed when you enter Quick Find.

Setting a Default Search Dialog

When you open Quick Find, the search properties that you can use to create your search expression are displayed. For example, the properties for Requests include "Approval Date," "Grant Amount," and "Project Title."

If you use the same property in most of your Request searches, you can set it as the default search dialog by clicking the "Display this upon entry to Requests Quick Find" option:

When you go to the Requests Quick Find, the default dialog is automatically displayed, saving you the step of clicking on its property in Quick Find.

Note: You cannot use this feature and the "Show Last Query in Quick Find" option at the same time because both features determine what is displayed when you first enter Quick Find. If you attempt to activate this feature while the "last query" feature is on, you are given the opportunity to turn the "last query" feature off.

You can set a default dialog for each folder in the Organizer—Requests, Organizations, Requirements, and so on. Note that the default dialog for the Payments folder is also used for the A/P Module's Quick Find, and vice versa.

Working with Your Last Search Query

If you wish to run or edit your last search, you have several options:

- Choose Options ➤ Show Last Query in Quick Find from the Main menu. When you enter Quick Find, the last search that you ran will be displayed as the current search criteria. You can edit or run the search.

  Note that when you turn this option on, any default search dialogs that you have set up are temporarily disabled so that your last search can be displayed instead. When you turn this option off, the default search dialogs are restored.

- In Quick Find, click the Last Search button. The criteria for your last search are displayed, and you can edit or run the search.

  Note that if you have set up GIFTS to display a default search property when you enter Quick Find, you cannot simultaneously set it up to display your last search. As an alternative, you can click the Cancel button in the property form to go to the main Quick Find form, where the Last Search button is available.

- Choose File ➤ Most Recent Searches from the Main menu and choose your last search from the list. The search is run.

Searching for Missing Data

For any property, you can search for records that are missing that property. To do so, simply choose "<is Missing>" as the value when you create an expression. For example, you can use the following procedure to search for the Requests in your database that are missing the Fund code in their Coding Sheet:

1. Open the Requests Quick Find (and click New Search to clear any existing search criteria, if necessary).
2. Click the Coding Sheet property and then double-click on the Fund code. You are prompted to choose a fund.
3. Choose "<is Missing>" and click Find Now. The results are displayed in the Organizer or, if there are no matching records, you are given the option to refine your search.

Printing the Syntax of a Search

Before sending your search query to the database, GIFTS converts it from English into the syntax required by the system to retrieve or report the data:

- If you are working in the Organizer, GIFTS translates the query into the language used by your database: Microsoft Access® for the file server version of GIFTS, and Microsoft SQL or Oracle SQL for the client/server edition.
- If you are generating reports, GIFTS translates the query into the language used by Business Objects's Crystal Reports.

It may be necessary for MicroEdge Technical Support to see your search syntax when troubleshooting a problem. To print a copy of the syntax for MicroEdge Technical Support, click Print on the Quick Find form.

Quick Find Property Type Reference

When you click on a property in Quick Find, you are creating an expression based on that property. Since the properties deal with different types of data—such as text, dates, and currency—the procedure for completing the expression varies, depending upon which property you've chosen.

This section describes, in detail, how to build expressions for each of the available property types:

- Coded fields
- Text
- Multiple IDs
- Dates
- Amounts
- Boolean (yes or no) selection
- Coding Sheets
- "One-touch" expressions

For more information about how Quick Find joins expressions and creates compound expressions, you can refer to "Search Terminology and Techniques" on page 108.

Code Selection

When you choose a coded property—such as Staff Member, Mailing List, or Request Status—you are searching a field populated with a single classification code from one of your system's Code Tables. A list of the classification codes that you can search for is displayed.

To complete the search expression:

1. Choose Is or Is Not to specify whether you are searching for records that have any of the highlighted codes, or records that have none of the highlighted codes.
2. Highlight one or more codes in the list. (To highlight a group of codes or more than one code, hold down SHIFT or CTRL as you click on them.)
3. Click OK to add the expression to your search criteria, or Find Now to run the search.

Text Selection

When you choose a property that searches a text field—such as Project Title, Organization Name, or Bank Name—a list of conditions is displayed.

To complete the search expression:

1. Choose a condition from the list.
2. To make the search case sensitive, enable the Match Case option.

   Note: Case-sensitive searching is not supported by Microsoft Access (file server) or Microsoft SQL (client/server); if you are creating a search from the Organizer and your system uses Access or SQL, Match Case is not available. Match Case is always available when you create an expression from the Report Library; however, if you save a case-sensitive search in the Report Library, it will not be case-sensitive when you run it in the Organizer (unless your system uses an Oracle database, which does support case-sensitive searches).

3. Enter the text you are searching for in the field at the bottom of the window, unless you chose the "is missing" condition.
4. Click OK to add the expression, or Find Now to run the search.

Multiple IDs Selection

When you choose an ID property—such as multiple Request IDs, multiple Organization IDs, or multiple Contact IDs—you can enter multiple IDs into

the Quick Find. This allows you to find multiple records more quickly. You must separate each ID using a comma.

To complete the search expression:

1. Enter multiple IDs in the Quick Find text box, separated by a comma.

   Note: You do not have to enter a space after each comma.

2. Click OK to add the expression, or Find Now to run the search.

Date Selection

When you choose a dated property—such as Project Start Date, Approval Date, or Meeting Date—a list of date conditions is displayed.

To complete the expression:

1 Choose a condition from the list. If you choose a range, such as 'last quarter,' GIFTS automatically generates and displays the date range.

The Update Automatically option is useful if you plan to save the search—the date or date range will be updated each time the search is used. For example, if you save a search for grants from 'last year' in the year 2005, it will search for 2004 grants for the duration of 2005. In 2006, the search will update to look for year 2005 grants. Note that you cannot edit automatically-updated dates.

If you do not click Update Automatically, the system calculates the date or date range you specify but will not modify the dates if the search is run later. You can manually edit the dates at any time.

2 Click OK to add the expression to your search criteria, or Find Now to run the search.

Amount Selection

When you choose a property with an amount value—such as Grant Balance or Recommended Amount—a list of conditions is displayed.

To complete the expression:

1. Choose a condition from the list.
2. Enter a value into the field at the bottom of the window (unless you chose the 'is missing' condition). Note that the system properly formats the value for you. For instance, if you are entering a dollar amount the system automatically inserts the dollar sign, commas, and decimal point.
3. Click OK to add the expression to your search criteria, or Find Now to run the search.

Boolean Selection

When you choose a Boolean (Yes/No) property—such as 'Wire Transfer' in the Payments Quick Find—you are prompted to specify whether you are searching for records that have that property or records that do not.

To complete the expression:

1 Choose Yes or No.

2 Click OK to add the expression to your search criteria, or Find Now to run the search.

Coding Sheet Selection

For Organizations, Contacts, and Requests you can search the Coding Sheets used to classify these types of records. When you click the Coding Sheet property, you are presented with the standard form for entering Coding Sheet information:

To complete the expression:

1 Highlight a category and click Add to enter the classification(s) you are searching for.

You can highlight other Categories and enter classification codes for them as well.

When you select several classifications within a single Quick Find expression, classifications from different Categories are ANDed together, and classifications from within the same category are ORed together.

Example: If you choose the 'Midwest' Geographical Area, and 'Education' and 'Arts & Culture' from the Program Area category, the search expression would be constructed as follows.

These expressions can be written out as:

(Program Area is Education or Program Area is Arts & Culture)
and
Geographical Area Served is the Midwest

Note that the parentheses indicate that the two Program Area expressions are treated as a compound expression. Without the parentheses, the query

would search for the Arts & Culture Requests in the Midwest, and—treating the first expression ('Program Area is Education') as a single entity—all Requests in Education.

If you are in the Report Library, you cannot enter 'is missing' onto the Coding Sheet.

2 Click OK to add the expression to your search criteria, or Find Now to run the search.

One-Touch Expressions

One-touch expressions are commonly-used expressions that are displayed in blue type in the Quick Find window. When you click on a one-touch expression, it is automatically built and displayed in the Quick Find form. Some examples are: "Request is Incomplete," "Activity is Overdue," and "Tax Status Requires Verification."

Using Recent Searches

Within each folder, GIFTS automatically saves several of your most recent searches. To run a recent search, just go to the folder in which the search was run and then choose File ➤ Most Recent Searches from the Main menu. Choose a search from the list that is displayed.

In addition, your use of the zoom feature is also saved in this list. For example, if you zoom on an Organization known as the A.B.C. Foundation and then go to the Requests folder, "Requests for 'A.B.C. Foundation'" is saved as a recent Requests folder search.

Using Saved Searches

You may find that you spend time composing a complex search query, and then find that you need to build it all over again when you need to run the same query later that day or the next day. On the other hand, you may search for a group of records in the Organizer and then decide that you'd like to run a Standard Report that includes the same group of records.

GIFTS allows you to save your search queries for use at any time, and you can share Searches between the Organizer and the Report Library. You can keep the Searches you use most often in a list of favorites. In addition, you can make your saved Searches available to other users.

You can also associate an Organizer View with a saved Search. When you run the saved Search, the results are displayed using the column selection, column formatting, and sort order of the View. This can be especially useful when you want to use the saved Search to produce ad hoc reports.

Tip: By making saved Searches and Organizer Views available to other users, you can create a library of ad hoc reports. (For information about ad hoc reporting, please refer to "About Organizer Reporting" on page 500.

Saved Searches are specific to the folder in which they were created because there are distinct properties available in each folder.

When you share a saved Search between the Organizer and the Report Library, it is available in the same Organizer or Report Library folder in which it was created. For example, a Search created in the Requests folder of the Organizer is available there and in the Requests folder of the Report Library. For more information about the Report Library folders, please refer to *Using GIFTS Reports*.

Saving a Search

To save a Quick Find or Advanced Search in the Organizer or Report Library:

1. Create and refine the Search as described in "Using the Quick Find Search" on page 85 or "About Advanced Searches" on page 108. Remember that in the Report Library, you cannot define your search criteria until you choose a Standard Report.

   Tip: If a Quick Find search expression includes a date, you can use the Update Automatically option to adjust the dates when the saved Search is used later. For example, if you save a Search for grants from "last year" in

1999, it will search for 1998 grants. In 2000, the Search updates to search for 1999 grants.

The date or date range specified by many *conditions* (such as 'last quarter' and 'last month') is automatically displayed here. You can edit the date or date range, unless you have chosen the **Update Automatically** option.

Enable this option to automatically update the dates in your search.

2 Run the search. The search results are displayed in the Organizer grid.

3 In the Organizer, choose Edit ➤ Save Search from the Main menu. In the Report Library, choose Edit ➤ Search ➤ Save Search.

Enter a name to identify the Search.

Enable this option to let other users use your Search.

Enable this option to let users use this Saved Search in ReviewerCONNECT.

Because the 'Allow others to use this search' check box is selected, only public Views are available. You cannot make a saved Search public unless any associated View is also public. Clear the 'Allow others to use this search' check box to have your private Views available.

4 Enter a Name for the Search, then edit the description if you wish.

Note: By default the Description field displays the search syntax; if desired, you can edit the description to better describe the search. If you edit the description, the search criteria remain unchanged.

5 To make this Search available for In Progress and Submitted Reviews page parts in ReviewerCONNECT, select the 'Available in ReviewerCONNECT' check box. This allows users to search for Reviews within these page parts using this Search.

6 If you want to associate an Organizer View with the Search, select the View from the drop-down menu. When the saved Search is run, the results are displayed using the column selection, column formatting, and sort order of the View.

Note: If you choose to make this saved Search available to other GIFTS users by selecting the 'Allow others to use this search' check box, only public Views are available. If you have selected a private View, *then* selected the 'Allow others to use this search' check box, a message asks you if you want to remove the private View and make the Search public. If you click No, the check box is cleared and the saved Search will remain private.

7 Click OK. The Search is saved. If the Search is a Quick Find search, it is available in both the Organizer and the Report Library. If the Search was created using the Advanced Search feature, it is available only in the View in which you saved it.

Running a Saved Search

You can use the following procedures to run a saved Search in the Organizer or, in the Report Library, use the saved Search as the criteria for a report.

1 In the Organizer, choose Edit ➤ Get Search from the Main menu. In the Report Library, choose the Standard Report you wish to run and choose Edit ➤ Search ➤ Select Search. The available saved Searches are displayed.

To locate a saved Search in the list, type text from the Search Name, Description, or Audit information here and press ENTER or TAB.

Column	Description
Name	The name of the saved Search.
Description	A short description of the Search.
View	The name of the Organizer View associated with the saved Search. If no View is associated, the column entry is "<None>."
Audit	The dates on which the Search was created and last modified and the Login IDs of the users that created and last modified the Search.

2 Choose a Search from the list. In the Organizer, click Run Search. In the Report Library, click Select Search.

Working with Your Favorite Searches

A Favorites tab in the Get Search window allows you to create a list of your most often used Searches. To add a saved Search to your list of favorites:

1 In the Organizer, choose Edit ➤ Get Search from the Main menu. In the Report Library, choose the Standard Report you wish to run and choose

Edit ➤ Search ➤ Select Search. The available saved Searches are displayed in the Saved Searches tab.

Click the Favorites tab to access the saved Searches you use most often.

2 Highlight the saved Search you want to make a favorite, then select Action ➤ Add Search to Favorites from the Saved Searches menu. The search will now appear in your Favorites tab.

To remove a saved Search from your Favorites tab:

1 In the Organizer, choose Edit ➤ Get Search from the Main menu. In the Report Library, choose the Standard Report you wish to run and choose Edit ➤ Search ➤ Select Search. Click on the Favorites tab.

2 Highlight the Search you no longer want to make a favorites and select Action ➤ Remove Search from Favorites from the Saved Searches menu. The Search is removed from your Favorites tab.

Modifying and Managing Saved Searches

You can rename, refine, save a copy of, and delete saved Searches at any time. To work with your saved Searches:

1 In the Organizer, choose Edit ➤ Get Search from the Main menu. In the Report Library, choose the Standard Report you wish to run and choose Edit ➤ Search ➤ Select Search. The available Searches are displayed.

To locate the saved Search in the list, type text from the Search Name, Description, or Audit information here and press ENTER.

2 Highlight the Search you want to work with in either the Favorites tab or the Saved Searches tab and:

- ❖ Click Edit Properties to edit the Search's name or description, to change the Search from public to private (or vice versa), to make it available for In Progress and Submitted Reviews page parts in ReviewerCONNECT, and to add or remove an associated View.

- ❖ Click Edit Criteria to open the Quick Find menu and change the Search. You can modify the Search as described in "Refining a Quick Find Search" on page 89 or "Refining an Advanced Search" on page 118. When you are finished editing the Search, you are returned to the list of saved Searches.

  (Using Quick Find properties to set the new search criteria requires you to clear the old search criteria completely. Click Advanced in the Quick Find form to add or edit the existing criteria.)

- ❖ To save a copy of the Search with a different name choose File ➤ Save As. This option is useful if you wish to create a new Search based on an existing saved Search.

- To delete a Search, click File ➤ Delete. You are prompted to confirm that you want to delete the Search.

About Advanced Searches

You may find that you'd like to run searches that are not available in the Quick Find searches provided for each folder. This can occur when:

- Quick Find cannot access the property (database field) you want.
- You need to join expressions in a way that is not supported by Quick Find.

You can combine a Quick Find search with an Advanced Search to make building complex queries as simple as possible. This section explains search terminology and techniques, uses an example to illustrate how to plan and run a very complex search, and describes how to refine an Advanced Search.

Search Terminology and Techniques

The GIFTS search facilities are based on standard database search techniques, and you can use the same concepts and strategies that you use with other search engines, such as those found on the Internet.

This background information is most applicable to the Advanced Search feature, but is helpful for building sophisticated Quick Find searches and for users who have no experience with search engines.

Tip: You'll find that most of your searches are easy to create with the Quick Find's intuitive interface—but when you need to create a complex database query, a good understanding of database search techniques is invaluable.

GIFTS searches for the information you request by sending a query to its database. A query consists of one or more search expressions, such as "Requests that were Approved last week," that tell the system what you are looking for.

Creating an Advanced Search Expression

Expressions consist of three elements: a property, a condition, and a value.

Element	Description
Property	This is the characteristic that you are using to limit your search results. For example, the Quick Find for Requests includes properties such as Grant Amount, Disposition, and Docket Number. Each search property corresponds to a *field* within the GIFTS database.
Condition	Conditions, such as "begins with," "contains," and "is" specify how you wish the system to check the data in the database field that contains the property you are searching for.
Value	This is the value for which you are searching, such as a range of dates or the name of a Contact.

Thus, the search expression for grants with a balance greater than $50,000 would be made up of the following elements:

Element	Example
Property	Grant Balance
Condition	Is greater than
Value	$50,000

Advanced Searches with More than One Expression

In most cases, you'll use more than one expression to narrow your search results. For example, if you wanted to view last quarter's grants for an Organization called the Brooklyn Ballet you would use the following two expressions:

Approval Date is last quarter
and
Organization Name is 'Brooklyn Ballet'

Note that the two expressions are joined by the conjunction 'And.' Depending on your intentions, you can join expressions with 'And' or 'Or.' Collectively, the expressions you use are known as the search criteria.

Unlike the Quick Find search, the Advanced Search does not automatically join expressions in order to afford you greater control of how expressions are joined. To join expressions in an Advanced Search, you manually insert the conjunctions And, Or, or Not between each search expression.

Compound Expressions

To get the information you need, you may have to create compound expressions. For instance, assume that you are searching for last year's grants in either Dance or Opera. To search for this information, you would use the following expressions:

Approval Date is Last Year
and
(Program Area is Dance or Program Area is Opera)

The parentheses indicate that the two Program Area expressions are joined into a compound expression that is to be treated as a single entity. Without the parentheses, the query would search for last year's Dance grants, and—treating 'Program Area is Opera' as a single entity—all Opera grants.

Quick Find automatically joins and compounds expressions based on the typical needs of searches; all Quick Find expressions that are built using the same property—such as Coding Sheet—are treated as a compound expression. Thus, this search example does not require an Advanced Search.

For complex searches where Quick Find cannot accommodate your needs, you can use the Advanced Search for precise control of the parenthesis and conjunctions in your search query. In the Advanced Search, you click the Left Parenthesis button or Right Parenthesis buttons to manually insert parentheses where you need them.

Complex Search Example

Because of the flexibility of the GIFTS search facilities, it is important to think clearly about what you are trying to accomplish before creating a complex search. To demonstrate how you can use Quick Find and the Advanced Search together, we will follow an example of a very complex query.

Imagine you have been asked to provide information about grants that your foundation has made to Education since 2000. Of these grants, you only want the College/University grants of $100,000 and over, and the K through Grade 12 grants of $50,000 and over.

To run this query, use the following steps:

- Determine the required search criteria
- Determine which search facility to use (Quick Find, Advanced Search, or both)
- Run the search

Determining the Required Search Criteria

First let's break down the individual elements of the query:

- ✔ Grants awarded since January 1, 2005
- ✔ College/University grants over $100,000
- ✔ Elementary and Secondary grants over $50,000

You'll need to create expressions to search for each element of the query. We would need the following expressions to look for these elements:

1. Approval Date is on or after January 1, 2000
2. Program Area is College/University
3. Grant Amount at least $100,000
4. Program Area is Elementary and Secondary

5 Grant Amount at least $50,000

Now, decide how these statements should be joined:

Expression 1
and
((Expression 2 and Expression 3) or (Expression 4 and Expression 5))

The expressions are joined this way because the grant has to be (1) Approved since 2000, and then either (2) in College/University for (3) at least $100,000 or (4) in Elementary and Secondary for (5) at least $50,000. Note that three sets of parentheses are needed to properly form the compound expressions in this query.

Choosing a Search Facility

Now, you can determine which search facility is appropriate for the query. Although you can access all of the properties you need (Approval Date, Program Area, and Grant Amount) using the Quick Find, you wouldn't be able to create the compound expressions needed. The way in which Quick Find automatically joins expressions is convenient for most searches, but cannot build the complex query we need here.

Therefore, in order to join the Program Area and Grant Amount expressions as needed we'll use the Advanced Search feature. However, you can still use the Quick Find for the Approval Date since it is not part of a compound expression.

Running an Advanced Search

This section demonstrates how to build an Advanced Search by using the search described in "Determining the Required Search Criteria" on page 111 as an example. To build this search:

1 Using the Quick Find search for the Requests folder, create the first expression, which specifies an Approval Date on or after January 1, 2005:

2 Click Advanced to switch to the Advanced Search. The expression you entered with the Quick Find search is displayed. Note that in the Advanced Search, the database syntax is displayed instead of the "plain English" syntax used by Quick Find.

3 Click "And," then click the Left Parenthesis button twice. Remember that you must enter all conjunctions and parentheses manually in the Advanced Search.

Important: Be sure to insert a conjunction between each expression; the Advanced Search is very sensitive to errors in the query syntax.

4 Find the database field that contains the property for which you are looking. To do this, first determine which Code Table probably contains the field for which you are looking. For example, if you are searching by the author of an outgoing letter (generated using the GIFTS mail/merge

feature), you'd look in the Activities table since information about outgoing letters is stored in an Activity record.

For this example, the property needed to create Expression 2 is the Coding Sheet, since we are specifying the College/University Program Area.

Note: Coding Sheet classifications are located in the Codes table of the database, and are named LEVEL1_ID through LEVEL5_ID.

5 Highlight the field and click Create Expression. You are prompted to choose a condition.

6 Select a condition from the list and click OK. You are prompted to enter the value of the expression.

7 Enter a value in the field below the condition. The type of value you enter—a range of dates, a currency value, the name of an Organization, and so on—depends upon the database field you are searching.

Tip: You can click the Value button to choose from a list of the values in your database for the property you are searching:

The presentation of the values varies according to the type of data you are working with:

- Some data, such as Coding Sheet classifications, are represented by a numeric value, so you'll need to review the list to find the value that corresponds to the classification.
- For coded fields, you can click Value to list the codes in the System Code Table that corresponds to that field. The State, Country, Contact Prefix, and Contact Suffix fields are an exception because they also allow users to enter text; the values displayed for these fields include every value that has been entered into your database, regardless of whether the value is in the System Code Table.

❖ For other fields, such as Grant Amount, the number of values in your database may be very large, and it would take GIFTS time to display them all—so it would be most convenient to type the amount in without clicking Value.

Important: The Advanced Search is very sensitive to the syntax of your expressions, and may not work properly if you do not enter values in the necessary format.

8 After entering the data, click OK. The syntax for Expression 2 is displayed:

The expression you created is added to the syntax. (The Education Program Area Code is represented by the number 615.)

9 Then enter Expression 3.

10 Enter the remaining parentheses, conjunctions, and expressions to complete the search.

11 Click OK to initiate the search. If no records match your search criteria, you are given the option to refine your search.

Refining an Advanced Search

If your search did not result in the information you need, you can return to the Advanced Search Criteria window and edit the syntax of the search. To edit an Advanced Search:

1 Open Quick Find. The Advanced Search syntax is displayed in the Quick Find form usually appears, and a message above the syntax indicates "Advanced Search; Press Advanced to Edit."

2 Click Advanced. The Advanced Search Criteria window is displayed, where you can manually edit the search syntax.

6 Reporting in Essential GIFTS

This chapter describes how to print and export ad hoc reports from the Organizer in Essential GIFTS.

In This Chapter

Setting Up and Running Ad Hoc Reports **120**
Using Organizer Views for Reports **122**
Essential GIFTS Print Options **122**

Setting Up and Running Ad Hoc Reports

This section outlines how to set up and print an ad hoc report, and refers to the sections in this manual that provide detailed information about these steps.

You can save a lot of time by saving Organizer settings—including column headings, column widths, sorts, saved Searches, and print options—as Organizer *Views*. These *Views* can serve as a library of ad hoc reports.

1 Specify the Search Criteria for the Report

In most cases, you want to limit the amount of data included in your report. For example, you might want to show only the top grants for the year 2000 instead of the top grants of all time.

You can use Quick Find, an Advanced search, or your saved searches to specify the search criteria that limit the data included in the report. For more information, see "Overview of the Organizer Search Facilities"

2 Set Up the Report Columns and Column Headings

From the Main menu, choose View ➤ Show Columns to access the column options described in "Working with the Organizer Columns" on page 49. You can add, remove, and combine columns; edit the column headings; and set the text formatting of each column.

3 Set the Sort Order of the Report

From the Main menu, choose View ➤ Show Sorts to define the order of the records in the report. For example, you can sort proposals by their Program Area. For details, see "Changing the Organizer Sort Order" on page 61.

Note that your sorts can be used (in Step 5) to group and subtotal records in the report.

4 Select the Records You Want to Include

Before running the report, you need to select the records that you want to include. This allows you to exclude some of the records displayed in the Organizer from the report.

To select all of the records in the Organizer, press CTRL+A. You can also hold down CTRL or SHIFT as you select records.

5 Set the Print Options

The print options allow you to control the headings, fonts, and grouping of the report. You can also specify whether totals and subtotals are included. From the Main menu, choose File ➤ Print to work with the print options described in "Essential GIFTS Print Options" on page 122.

6 Preview and Print the Report

From the Print Setup, choose File ➤ Preview or File ➤ Print to preview or print the report.

Tip: Now, go to the next page to see how much easier ad hoc reporting is after you've set up your Organizer Views. These *Views* can serve as a library of ad hoc reports.

Using Organizer Views for Reports

Now, look how easy it is to print ad hoc reports once you have set up your Organizer View. (For more information about Views, see "Using Organizer Views" on page 63.)

1 Apply an Organizer View

From the Main menu, choose View ➤ Edit Views to select and apply an Organizer View. The column, sort, search, and print options for the View are applied to the Organizer.

2 Select the Records You Want to Include

Before running the report, you need to select the records that you want to include. This allows you to exclude some of the records displayed in the Organizer from the report.

Note that if the saved Search for the Organizer View is not appropriate, you can run another search.

3 Preview and Print the Report

From the Main menu, choose File ➤ Print to go to the Print Setup. You can make any needed changes, and then choose File ➤ Preview or File ➤ Print to preview or print the report.

Essential GIFTS Print Options

The GIFTS print options allow you to control the justification (left, right, or center) and fonts of the headers and data in your ad hoc report. In addition, you can edit the report headers and specify how the report is grouped and whether it includes subtotals and totals.

The following example demonstrates some of the GIFTS ad hoc reporting features.

You can use the print options to edit the text, size, font, and placement of the report headings.

You can use the Organizer column settings to add or remove columns and to edit the column headings.

You can use the print options to specify whether subtotals and a grand total are included.

In this report, the grants were sorted by city in the Organizer, and the print options were set to group the grants by city and to display a header for each group.

You can use the print options to specify the font and size of the text in the report.

Grants to Organizations in California

Grouped by City

Monday, May 15, 2000

Dates	Organization	Project Title	Request Amount	Grant Amount	ID
Carmel					
Approved 6/8/1999 Start: 6/8/1999 End: 6/8/2000 (KG)	Sunflower House for Youth in Distress Shawna Dawn Tel: (4050 767-3450 Fax: (405) 767-3440 dawns@sunflower.org	General Operating Support	$56,100.00	$56,100.00	227
Approved 6/9/1998 Start: 6/9/1998 End: 6/9/1999 (CR)	Sunflower House for Youth in Distress Shawna Dawn Tel: (4050 767-3450 Fax: (405) 767-3440 dawns@sunflower.org	General Operating Support	$55,000.00	$55,000.00	145
Declined 6/9/1997 (CR)	Sunflower House for Youth in Distress Shawna Dawn Tel: (4050 767-3450 Fax: (405) 767-3440 dawns@sunflower.org	The support of a new homeless shelter	$25,000.00	$0.00	77
Approved 6/3/1996 Start: 6/3/1996 End: 6/3/1998 (KG)	Sunflower House for Youth in Distress Shawna Dawn Tel: (4050 767-3450 Fax: (405) 767-3440 dawns@sunflower.org	The construction of a new halfway house for pregnant teens	$250,000.00	$250,000.00	41
Declined 10/29/1999 (KG)	Sunflower House for Youth in Distress Shawna Dawn Tel: (4050 767-3450 Fax: (405) 767-3440 dawns@sunflower.org	To Support the Buldout for a New Gymnasium	$45,000.00	$0.00	252
			$431,100.00	$361,100.00	
Total Carmel (5 items)					
Los Angeles					
Approved 6/9/1997 Start: 6/9/1997 End: 6/9/1998 (KG)	Arlington School of Dentistry Anita Rayce Tel: (203) 771-1265 Fax: (203) 771-1233 raycea@franklinstateuniversity.org	The sponsorship of a table for the "Annual Leadership Award Dinner"	$3,000.00	$3,000.00	81
Pending 2/3/2000 (ADMIN)	Arlington School of Dentistry Anita Rayce Tel: (203) 771-1265 Fax: (203) 771-1233 raycea@franklinstateuniversity.org	To sponsor the "Annual Leadership Award Dinner"	$4,120.00	$4,120.00	305
Approved 6/7/1999 Start: 6/7/1999 End: 6/7/2001 (LW)	Arlington School of Dentistry Anita Rayce Tel: (203) 771-1265 Fax: (203) 771-1233 raycea@franklinstateuniversity.org	The Support for the Restoration of the School of Dentistry Library	$50,000.00	$50,000.00	237

1

To set the print options:

1 From the Main menu, choose File ➤ Print. The Print Setup window opens:

2 On the Report tab, you can edit the text of the report headers. To insert a carriage return into a header, press SHIFT+ENTER. Note that the Header 1 and Header 2 fields only display one line of the header at once; you can use the up and down arrow keys to move between the lines of your header.

3 On the Report tab, you can edit the fonts used for the report headers, column headings, and report data. You can also edit the alignment (left, center, or right) of the headers. To edit the fonts, click one of the Font buttons or use the Tools menu.

4 Check the 'Print Grand Totals' option if you want to include a grand total at the end of the report. The grand total includes the number of items in the report and—if the report includes a currency column like 'Grant Amount'—a total of the currency values.

5 On the Grouping tab, you can set the grouping options for the report.

The grouping fields are the same as the sorts used in the Organizer.

To group the report using the first available sort field (such as 'Grantee Organization City' or 'Program Area'), click the 'Group' option. The remaining grouping options for the field are enabled.

Click 'Print subtotals' to include subtotal amounts.

You can print lines above and/or below subtotal values.

Click 'Print header' to include a header for each group of items.

Declined 10/29/1999 (KG)	Sunflower House for Youth in Distress Shawna Dawn Tel: (4050 767-3450 Fax: (405) 767-3440 dawns@sunflower.org	To Support the Buldout for a New Gymnasium	$45,000.00	$0.00	252
			$431,100.00	$361,100.00	
Total Carmel (5 items)					
Los Angeles					
Approved 6/9/1997 Start: 6/9/1997 End: 6/9/1998 (KG)	Arlington School of Dentistry Anita Rayce Tel: (203) 771-1265 Fax: (203) 771-1233 raycea@franklinstateuniversity.org	The sponsorship of a table for the "Annual Leadership Award Dinner"	$3,000.00	$3,000.00	81

- Click 'Print header' to print a header at the beginning of each group.
- Click 'Repeat header per page' to repeat the group's header at the beginning of each page of the report.
- Click 'Print subtotals' to print a subtotal for each group.
- Click 'New page on break' to start a new page at the beginning of each new group.
- If you are printing subtotals, use the 'Subtotal lines' to specify whether there are lines over and/or under the subtotal values.

6 On the Page Setup tab, you can choose your paper size, paper orientation, and margins. Also decide if you want to print all rows in the Organizer grid, or only selected rows:

Once you have set all of the print options, you are ready to preview or print the ad hoc report, as described in the following section.

Previewing an Ad Hoc Report

To preview the layout of an ad hoc report, choose File ➤ Preview from the Print Setup menu. GIFTS displays a preview of the report.

- To choose the magnification of the report, choose Action ➤ Zoom In or Action ➤ Zoom Out from the Print Preview menu.

  If the magnification selected is too large for the full page to appear in the window, you can use the scroll bars to scroll horizontally or vertically, or click and drag the bottom right corner of the window to resize it.

- Choose View ➤ Next Page or View ➤ Previous Page from the Print Preview menu to preview the pages of the report. You can also choose View ➤ First Page or View ➤ Last Page to go to the beginning or end of the report.

- If you do not want to print the report, or if you need to adjust the column widths or print options, choose File ➤ Close to return to the print options.

- If you are ready to print the report, choose File ➤ Print from the Print Preview menu.

Printing an Ad Hoc Report

To print an ad hoc report, set the print options as described in "Essential GIFTS Print Options" on page 122 and then choose File ➤ Print from the Print Setup menu.

Exporting Data from the Organizer

You can export the data in the Organizer so that you can format or modify it in your spreadsheet program. In addition, you can export Organizer data to an HTML file.

To export the records you have selected in the Organizer grid, choose File ➤ Export from the Main menu. You are prompted to choose your spreadsheet or the HTML format:

- If you choose your spreadsheet, GIFTS launches your spreadsheet program (if it is not already open) and exports the column headings and selected records into a new spreadsheet document.
- If you choose HTML, you are given several options for formatting the HTML file.

- You can export the column headings, background color (alternating white and yellow rows), and font attributes from the Organizer. You can use the Page Title field to edit the title of the HTML file, and decide whether you want to import all Organizer grid rows, or only selected rows.
- Click OK to export the data. You are prompted to enter a file name.

- Enter the file name and click Save. The file is saved, and—if you chose the Launch Browser option—displayed in your Web browser.

7 Quick Entry

This chapter describes how to use the Quick Entry feature of GIFTS to process immediate declinations, enter basic information about a new proposal, or enter historical grant information.

In This Chapter

About Quick Entry **132**

Step 1: Beginning a Quick Entry Session **134**

Step 2: Specifying the Recipient Organization **135**

Step 3: Specifying the Primary Contact **136**

Step 4: Entering Address Information **138**

Step 5: Entering the Request Information **139**

Step 6: Saving the Request and Sending Correspondence **142**

About Quick Entry

Quick Entry is tailored to high-volume data entry—when a large amount of information needs to be processed as quickly as possible—and enables you to speed the entry of basic information about pending proposals, immediate declinations, and historical grants.

After using Quick Entry to enter this data, you can review, edit, and report on it just as you can for any other data in GIFTS. The Quick Entry form includes fields for entering basic Organization, Contact, and Request data:

- If you are entering data for a new grantee, GIFTS creates all of the necessary Organization, Request, and Contact records for you.
- If you are entering a Request for an existing Organization or Contact, GIFTS associates the new Request with the appropriate Organization or Contact in your database.

In addition, you can generate correspondence for immediate declinations and pending proposals either as you save each new Request, or by generating a batch of correspondence at the end of your Quick Entry session.

What Information Can I Enter with Quick Entry?

You can use Quick Entry to:

- Enter information about a *pending proposal* and send a letter of acknowledgement or similar correspondence to the grantseeker.
- Enter information about an *immediate declination* and send declination correspondence to the grantseeker.
- Enter information about a *historical grant*. You can use this option if you have data from paper files or another computer system that you wish to enter in GIFTS for historical reporting.

The following paragraphs detail the information that you can enter with Quick Entry; use this information to determine how you can take advantage of this feature.

Organization The Organization Name, Department, and address information. If the Organization is already in your database, you can review or edit its tax status information.

If the proposal came from an individual, you can leave the Organization information blank and GIFTS associates the Request with the "Requests from Individuals" Organization specified by your administrator.

Primary Contact The Primary Contact entered in Quick Entry is the Primary Contact for the new Request. You can enter the Primary Contact's name, prefix, suffix, title, e-mail address, and telephone number or—if the Organization you chose was already in your database—choose any of the Contacts affiliated with that Organization.

Organization / Primary Contact Address The mailing address for the Primary Contact and, if applicable, the Organization that submitted the proposal.

Request Information The Request Type, Request Status, and Disposition; the Project Title; and the member of your staff assigned to the Request. In addition:

- For immediate declinations, you can enter the Declination Reason.
- For proposals and declinations, you can enter the Request Date and Request Amount.
- For historical grants, you can enter the Grant Date, a Payment Date for a single Payment, the Grant Amount, and the Term of the grant, which is used to calculate the End Date of the grant.

Coding You can enter coding information onto the Coding Sheet for the new Request.

Correspondence You can generate merged correspondence when you save each new proposal or declination, or generate the correspondence as a batch at the end of your Quick Entry session.

Using Quick Entry

Before You Begin: In you are going to enter proposals from individuals, ensure that your administrator has set up a "Requests from Individuals"

Organization. All Requests from individuals are associated with this Organization record.

To enter a proposal, historical grant, or immediate declination:

1. Begin a Quick Entry session.
2. Specify the recipient Organization.
3. Specify the Primary Contact for the Request.
4. Enter the address information.
5. Enter the proposal, grant, or declination information.
6. Save the Request and, if appropriate, generate merged correspondence.

Step 1: Beginning a Quick Entry Session

To begin a Quick Entry session, choose Quick ➤ Immediate Declinations/ Pending Requests Entry or Quick ➤ Historical Grants Entry from the GIFTS Main menu. A blank Quick Entry form is displayed.

Until you close the entry form, GIFTS considers this to be a single data entry session.

Step 2: Specifying the Recipient Organization

Note: If you are entering a proposal from an individual, click TAB to skip the Organization Name and Subdivision fields. GIFTS will associate the proposal with the "Requests from Individuals" Organization set up by your GIFTS administrator. You can proceed to "Step 3: Specifying the Primary Contact" on page 136.

Tip: If the proposal is from an organization, you should search for an existing Organization record before creating a new one to ensure that you don't create a "duplicate" record.

If your administrator has set up GIFTS to automatically search for duplicate Organizations when you enter data in the Name field, you can enter all or part of its name and press TAB to initiate the search. Otherwise, click the Search button.

GIFTS displays the results, if any, of your search.

❖ If the correct organization is not listed, you can refine your search, click Cancel to return to Quick Entry, or click New to create a new

Organization record. For information about entering Organization data, please refer to "Adding and Modifying Organizations" on page 179.

❖ If you choose an existing Organization from the search results and click OK, you are returned to Quick Entry and the Primary Contact and Address fields are automatically populated with data from the Organization.

You can click the Organization's ID to "jump" to its Organization record.

Tip: To "jump" to an Organization record from the entry form, you can click its ID, which is underlined.

Once you have specified the correct Organization, you can enter the subdivision within the Organization that submitted the proposal (if necessary) and proceed to the next section to identify the Primary Contact for the Request.

Step 3: Specifying the Primary Contact

Note: If you chose an existing Organization in the previous step, the Organization's Primary Contact is automatically chosen as the Primary Contact for the Request. You can choose any of the Organization's Contacts from the pull-down list, or clear the Last Name field to enter a new Contact.

Tip: You should search for an existing Contact before creating a new one to ensure that you don't create a "duplicate" record for a Contact that is already in your system.

If your administrator has set up GIFTS to automatically search for duplicate Contacts when you enter data in the Last Name field, you can enter all or

part of his or her name and press TAB to initiate the search. Otherwise, click the Search button.

GIFTS displays the results, if any, of your search.

- If the Contact is not listed, you can refine your search or click Cancel to return to Quick Entry, where you can enter the new Contact's information.

- If you find the Contact, highlight his or her record and click OK. The Contact information is displayed on the Quick Entry form. Note that the address information is updated with the Contact's Primary Mailing Address.

You can click the Contact's ID to "jump" to his or her Contact record.

Tip: To "jump" to a Contact record from the entry form, you can click the Contact's ID, which is underlined.

Once you have specified the Primary Contact, you can proceed to the next section to enter or verify the address information.

Step 4: Entering Address Information

The address information on the Quick Entry form is used as the mailing address for correspondence you send regarding the Request.

If both the Organization and the Contact for the Request are new, the address information you enter on the Quick Entry form is saved as the Organization's mailing address and the Office Address of the Primary Contact.

The caption indicates how the address information will be saved.

If you chose an Organization and/or Contact from your database, the address fields display the address information from the Organization and/or Contact record, as follows:

- If the Contact's Primary Mailing Address is the same as the Organization's address, the "Organization/Primary Contact Address" is displayed.
- If you created a new Contact, you can click the 'Use Org. Address' option to save the Organization's address as the Contact's Office Address (which is marked as his or her Primary Mailing Address). If you clear the 'Use Org. Address' option, you can enter a separate mailing address for the Contact.
- If you associated an existing Contact with a new Organization, the Contact's address will be used as the new Organization's address.

Once you have entered or reviewed the address information, you can proceed to the next section to enter the Request information.

Step 5: Entering the Request Information

The following sections describe how to enter pending proposals, immediate declinations, and historical grants.

Entering Proposal or Declination Information **139**

Entering Historical Grant Information..... **141**

Entering Proposal or Declination Information

On the right side of the Quick Entry form, you can enter the following information for Pending Requests and immediate declinations.

This field is displayed only if you select the disposition of Declined.

Field	Description
Disposition	Choose 'Pending' for proposals that you plan to consider, or 'Declined' if you are declining the proposal.
Type	The type of Request. Grant makers often use only the standard type of 'Cash Grants.' Other grant makers, particularly corporate giving programs, may have additional types, such as 'Memberships' or 'Dinners.'

Field	Description
Status	The current status of the Request.
Declination Reason	For declinations only, the reason you declined the Request.
Date	This date is saved as the Request Date. For declined Requests, Quick Entry saves the current date (according to the system clock of your workstation) as the Declination Date.
Amount	The Requested Amount.
Staff	The member of your staff responsible for this Request.
Project Title	A short description of the project, limited to 255 characters.
Letter	If you wish to send correspondence, choose a letter template from this list. If you are entering a proposal, your pending letter templates are available; if you are entering a declination, your declination letter templates are available.

If you wish to edit the Coding Sheet for the Request, click Coding Sheet. For information about working with Coding Sheets, please refer to "Working with Coding Sheets" on page 29.

Entering Historical Grant Information

On the right side of the historical grants Quick Entry form, you can enter the following information.

Field	Description
Disposition	The disposition must be Approved, so this field cannot be edited.
Type	The type of Request. Grant makers often use only the standard type of 'Cash Grants.' Other grant makers, particularly corporate giving programs, may have additional types, such as 'Memberships' or 'Dinners.'
Status	The current status of the Request.
Grant Date	The date on which the grant was awarded. This date is used to calculate the grant's fiscal year, which is used for calculations in some standard financial reports.

Field	Description
Payment Date	For historical grants, Quick Entry creates a single 'Paid' Payment for the entire amount of the grant. This date is saved as the Scheduled Date and Paid Date of the Payment. **Note:** If you need to enter a more detailed payment schedule for the grant, you can edit the grant later in GIFTS. If you use the optional Budget Module and the Payment falls within an open Budget Year, you will be prompted to resolve the Payment against the Budget when you save this Request.
Amount	This amount is saved as the Request Amount and Grant Amount of the Request, and also as the amount of the Payment for the grant.
Term	The term of the grant, in months (the default is "12"). GIFTS uses the Term and Grant Date you enter to calculate the End Date of the grant.
Staff	The member of your staff responsible for this Request.
Project Title	A short description of the project, limited to 255 characters.
Letter	This field is deactivated because there is no need to generate correspondence for historical grant information.

If you wish to edit the Coding Sheet for the Request, click Coding Sheet. For information about working with Coding Sheets, please refer to "Working with Coding Sheets" on page 29.

Step 6: Saving the Request and Sending Correspondence

At this point, you have entered all of the Quick Entry data for the Request. You can save the Request and continue your Quick Entry session, or save the Request and close your Quick Entry session.

Note: If you want to see the ID of the Request that you have created when you save Quick Entry data, choose Tools ➤ Display Request ID After Saving

from the Quick Entry menu. A message similar to the following is displayed when you save Quick Entry data.

Saving Requests without Correspondence

If you did not choose a letter template for the Request and do not need to generate correspondence for it, you can either:

- Click Save and New to save the Request and clear the Quick Entry form.

- Click Save and Close to save the Request and end your Quick Entry session.

Saving Requests and Generating Correspondence

During each Quick Entry session, you are prompted to verify the correspondence options the first time you save a Request for which you are generating correspondence.

You can edit the correspondence options, as needed, and click OK. This signer information is applied to correspondence for the Request and will be

used for the remainder of the correspondence that you generate during this data entry session.

Option	Description
Create an Activity for this correspondence	Create a Document Activity record for the correspondence that you generate. By default, the current date is used as the Activity Date.
Save e-mail text in Activity long notes	If you are creating e-mail correspondence, you can add the text of the e-mail message to the Activity record's Long Notes field.
Keep document permanently on disk	If you are creating a printed letter, use this option to save the letter as a word processor document.

Note: If you change the correspondence options later in your data entry session by clicking Correspondence Options, the correspondence options are not changed for the Requests that you have already saved. Changes that you make to the correspondence options apply only to the correspondence for Requests that you save after making the change.

Your options for saving the Request and generating correspondence are as follows:

- Click Save and Print to save the Request and generate its correspondence. The correspondence is displayed in your word processor or the GIFTS Correspondence viewer described in "Working with the Correspondence Viewer" on page 460.

  After you print or send the correspondence, the Quick Entry form is cleared and you can continue your data entry.

- Click Save and New to save the Request and continue your Quick Entry session. (You'll be able to generate correspondence later, when you end your Quick Entry session.)

- Click Save and Close to save the Request and end your Quick Entry session. If you used the Save and New button to save Requests without generating correspondence, the correspondence for all the Requests you entered during your session is displayed in the correspondence viewer as described in "Creating Batch Correspondence" on page 461.

8 Working with Organizations

This chapter describes how to use GIFTS to maintain information about your grantee Organizations.

In This Chapter

About Organization Records **146**
Avoiding Duplicate Organizations **146**
Searching for Organizations **147**
Organizations Folder **149**
Adding and Modifying Organizations **151**
Organization Affiliations **166**
Organization Subsidiaries **169**
Using Organization Alerts **173**
Deleting an Organization **175**
Researching an Organization **175**

About Organization Records

An Organization record in GIFTS is similar to a file folder for an Organization that you are considering for funding. Organization records include all your information about an Organization, including its background, tax status, mailing and World Wide Web addresses, and telephone numbers.

The Organization record is also linked to the other records that apply to it, such as the Request records for its proposals and the Contact records for the people affiliated with the Organization.

In addition, each Organization record has a Coding Sheet that you can use to classify it for reports and queries. For instance, you classify an Organization as one that operates within the Organization Type of "Human Services."

You can also classify the Organization as a subsidiary of a larger "parent" Organization—for example, an academic department within a university. You can track Requests, Payments, and generate reports for the parent Organization and its subsidiaries.

Avoiding Duplicate Organizations

As you use GIFTS, it is always important to keep your data as accurate and error-free as possible. In the case of Organization records, it is particularly important to avoid creating more than one record for the same Organization.

For instance, you may create a new Organization record for Longwood State University, and enter historical information including two previous grants and a declination.

A new proposal comes in from Longwood State. Rather than creating a new Request for Longwood State, suppose the person entering data creates a new Organization record for Longwood State and then enters the proposal data.

In this scenario, you would now have two records for Longwood State. If someone tries to view the history of Longwood State while working with

the current proposal, the system would show no history with Longwood State. This is only one type of error that can occur with duplicate Organizations.

To prevent this, your administrator can configure the system to automatically search for duplicate Organizations when you enter the name of a new Organization.

If the system finds Organization names that start with the name you entered into the Name field, a list of the matching names is displayed. For example, if there were records in your database for "Longwood State University" and for "Longwood University of Ohio," both would be displayed as potential duplicates if you entered "Longwood" as a new Organization name.

Important: Be sure to avoid spelling errors in the name of the Organization, since this may mean that a search for it will fail.

Searching for Organizations

Searching for Organizations is important for several reasons besides simply displaying the Organization's information:

- Before you create a new Organization, you should first search to make sure that the Organization is not already in your database. Duplicate Organization records can cause many problems, as described in "Avoiding Duplicate Organizations" on page 146.
- When you enter a new Request, you should first search to see if the grantee Organization is already in your database.

You can search for Organizations using any of the search techniques described in "Working with Records in the Organizer" on page 44. This section details each of the Quick Find search properties for Organizations.

You can search on any combination of the following properties:

Property	Description
Charitable Missing Tax Status	Charitable Organizations whose Tax Status is not specified on the Tax Status page of the Organization record.
City	The city in the Organization's mailing address.
Coding Sheet	Searches for classification codes on the Organization Coding Sheet. Note that this property is not available for Essential GIFTS.
Name	The name of the Organization. Depending upon options chosen by your administrator, the system searches for the Organization's name, A.K.A. name, sort name, legal name, or any combination of these four names.
Organization ID	The ID of the Organization. (GIFTS assigns an ID to each Organization as it is created. These numbers are sometimes included in reports for quick reference.)
Organizations with Alerts	Search for Organizations that have alert messages.
Organizations without Grants	Search for Organizations that have no Grants affiliated with them.
Organizations without Requests	Search for Organizations that have no Requests affiliated with them.

Property	Description
Postal Code	The postal (or ZIP) code in the Organization address.
Primary Contact's Last Name	The last name of the person assigned as the Primary Contact on first page of the Organization record.
State	The state in the Organization's mailing address.
Tax ID	The Tax ID number of the Organization.
Tax Status Requires Verification	Charitable Organizations whose Tax Status verification is overdue, as specified on the Tax Status page of the Organization record.
Vendor Number	The Vendor Number in the Organization record. (Vendor Numbers are useful if your external accounting system requires them.)

Organizations Folder

The Organization folder displays information after you have successfully searched for an Organization, or if you have zoomed in on a record in

another folder and then switched to the Organization folder The following is an example of the Organizations folder display.

You can customize the format, sort order, and content of the information in the Organizer, as described in "Working with the Organizer" on page 37. By default, the following information is displayed in the Organizations folder.

Default Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the Organization. You can double click on the mark to view the alert.
Organization	The Organization's name and complete address.
Primary Contact	The name and office number of the Organization's Primary Contact.
Also Known As	The Organization's A.K.A. name, if any.

Default Column	Description
Legal Name	The Organization's legal name. This is usually the name on the Organization's 501(c)(3) or similar document.
ID	The unique, system-defined identification number assigned to the Organization.
Audit	The dates on which the record was created and last modified, and the Login IDs of the users that created and last modified the record.

The following colors are used in the Organizations folder to provide at-a-glance information.

Color	Meaning
Black	No outstanding circumstances.
Red	The Organization is flagged as a Charitable Organization, but its Tax Status has not been specified.
Green	The Organization is flagged as a Charitable Organization and the Next Verify Date for its Tax Status has expired.
Blue	This Organization is flagged as Non-Charitable; therefore, no Tax Status information is necessary.

Adding and Modifying Organizations

To add a new Organization, do one of the following:

- Go to the Organizations folder and click the New button on the Folder toolbar.

- Click the New Organization button on the Main toolbar.
- Choose File ➤ New ➤ Organization from the Main menu.

The Organization record is displayed.

To modify an existing Organization, select it in the Organizations folder and Choose File ➤ Open from the Main menu.

Organization records are divided into the following tabs.

Tab	Description
Organization	Basic information about the Organization, such as its mailing address and Primary Contact information.
Tax Status	Includes IRS information, including the Organization's Charitable Organization Tax Status, if any.
Background	Provides details about the Organization and its mission. This information can be included automatically in write-ups and in other materials. The Organization's Vendor Number is also included here.
Wire Transfer	If you make payments to the Organization by wire transfer, you can enter the account information here.
Coding	Information used to classify the Organization using categories such as 'Organization Type.' Note that Essential GIFTS does not support Organization coding.
Affiliations	The people involved with the Organization and its Requests.
Subsidiaries	If the Organization is the "parent" of subsidiary Organizations, they are listed here.

To access the information in any of these tabs, simply click on the tab. When you are finished working with the Organization, you can click Save and Close.

Entering the Organization Name

The Organization tab is where you enter the Organization name, address, and facsimile numbers, the Primary Contact, and notes about the Primary Contact's relationship with the Organization. This is the minimum information that should be entered for any Organization.

If your administrator set up GIFTS to automatically search for duplicate records, GIFTS searches for an existing Organization with the Name you enter for the new Organization when you press TAB.

- If no match is found, the cursor will move to the next field, and you can continue entering the new record.
- If a match or matches is found, GIFTS displays a list of the Organizations found by the search:

Review the list of records and determine if the Organization you are entering is already in GIFTS. If so, double-click on the appropriate record to load the existing record into the data entry window. If none of the records found is a duplicate, click Cancel and continue entering the new record.

Entering the Organization Address Information

Use the following fields on the Organization tab of the Organization record to track the Organization's address information.

Field	Description
Address	The address used for correspondence and on reports. You can enter as many lines as necessary, but note that most mailing labels can only accommodate two or three lines. If the Organization is located in a country other than the U.S. or Canada, you can: ❖ Enter its full address, excluding the country, in this field. ❖ Verify that your administrator set up GIFTS to ignore the City, State/Province/County, and Postal Code fields for addresses outside the U.S. and Canada. If you enter addresses in this manner, merged correspondence will use the address in this field and the information in the Country field when addressing this Organization, ignoring the City, State/Province/County, and Postal Code fields. Please note that the option to ignore the City, State/Province/County, and Postal Code fields *does not affect the addresses used in reports*, including the mailing list reports.
City	The Organization's city.
State / Province / County	The Organization's state, province, or county. Defaults to the state, province, or county specified by your administrator. *The maximum number of characters for this field is 20.*
Postal Code	The Organization's postal code. If your administrator enabled the postal code data entry shortcut, you can skip the City, State, and Country when you create or edit an address. Enter the Postal Code and click any field. GIFTS fills them in for you. If these fields are not filled automatically, the shortcut is not enabled or the Postal Code you entered is not on file. You can enter the City, State, and Country manually.
Country	The Organization's country. Type the country name or choose one from the list. This field defaults to the country specified by your administrator.

Field	Description
Phone	The Organization's main telephone number. Enter the number exactly as you wish it to be displayed and printed. For example, "(703) 432-4949" or "703-432-4949." If your administrator specified a default telephone number format, type the number with no area code, parentheses, spaces, or dashes. GIFTS formats the number for you. If your administrator defined a default area code, and you type a telephone number with no area code, GIFTS adds the default area code. If the default is not appropriate for the telephone number you typed, you can edit it.
Extension	The telephone extension.
Fax	The Organization's fax number.
E-mail	The e-mail address for the Organization. Note that if the e-mail address is displayed in blue, it is a "hot link": to send an e-mail message, you can click on it and send a message as described in "Sending E-mail Messages" on page 465. To edit the e-mail address, click on the blank area to the right of the e-mail address. Then use the left arrow to move the cursor to the area that you want to edit.
WWW	The Organization's address on the World Wide Web. If the address is displayed in blue, it is a "hot link": you can access the site by clicking on the address. To edit the Web address, click on the blank area to the right of the Web address. Then use the left arrow to move the cursor to the area that you want to edit. For more information on accessing an Organization's Web site, see "Viewing an Organization's Web site" on page 175.

Entering an Organization Primary Contact

The Primary Contact is the person from the Organization with whom you have the most contact. When you choose a Primary Contact, the system creates an Organization Primary Contact Affiliation—a special type of Affiliation used to identify the person as the Organization's Primary Contact. (For more information about Affiliations, please refer to "Organization Affiliations" on page 166.)

To select a Primary Contact for the Organization, type the person's name in the Last Name field (on the top right of the Organization tab) and press the Tab key. GIFTS searches the Contacts folder for people with that last name.

❖ If a match or matches are found, a list of the matches is displayed.

To choose a Contact from the list, highlight his or her record and click OK. If none of the matches are correct, you can modify the search. If you cannot find the Contact, click Cancel to return to the Organization Detail screen.

❖ If the system did not find a matching last name, or if you rejected the people it did find by clicking Cancel, the necessary Contact fields are displayed on the Organization Detail screen. Enter this basic information about the Primary Contact, and the system will create a Contact record for them when you save the Organization information.

After you have chosen or created a Contact, you can use the Title and Relationship Notes fields for information about the Contact's title within and/or relationship to the Organization.

When the Organization record is saved, the system creates the Organization Primary Contact Affiliation between the Contact and the Organization.

Note: If you created a new Contact, a Primary Organization Affiliation is created between the Contact and the Organization you are working with. (Primary Organization Affiliations designate an Organization as the person's Primary Organization—which is usually their employer.) Thus, when you go to the Affiliations page of the Organization you will see two Affiliations for the Primary Contact. For more information, please refer to "Organization Affiliations" on page 166.

Changing the Organization Primary Contact

To change the Primary Contact for the Organization, enter a new name into the Primary Contact Last Name field. GIFTS searches the Contacts folder for people with that last name, and you can choose a Contact as described in "Entering an Organization Primary Contact" on page 155.

An Organization Primary Contact Affiliation is created between the Contact and the Organization. Note that the Organization Primary Contact Affiliation for the previous Primary Contact is deleted, but the other Affiliations for that Contact—including his or her Primary Organization Affiliation—are not changed.

Clearing the Organization Primary Contact

You can clear the Primary Contact information, leaving the Organization with no Primary Contact. To do so, you can do either of the following:

- Choose Action ➤ Clear Contact from the Main menu of the record.
- Double-click anywhere in the box that contains the existing Primary Contact's name and telephone number.

You are prompted to confirm that you wish to clear the Primary Contact information. Click Yes. The Organization Primary Contact Affiliation for the Primary Contact is deleted. Note that the other Affiliations for that Contact—including his or her Primary Organization Affiliation—are not changed.

Tax Status

In most cases a donation is only deductible when it is made to an Organization that qualifies under Section 170 (c) of the Internal Revenue Service (IRS) code. Many giving programs further restrict their contributions to government agencies and Organizations that qualify under Section 501(c)(3) of the tax code.

If you designate an Organization as "charitable," GIFTS automatically checks its Tax Status and displays the Organization in red or green type if its Tax Status information is missing or due to be verified.

The cumulative index section of the Tax Status tab documents who verified the information, when they verified it, and when it should be verified again. This information is not required, but makes it possible to quickly identify Organizations that are scheduled for re-verification. If the Organization is not in the cumulative index (Pub 78), the Notes field should indicate how the status was verified.

The *Tax Status* fields to the right are not displayed unless this box is checked.

Field	Description
Legal Name	The legal name of the Organization.
Tax ID	The Employer Identification Number (EIN) of the Organization.
Registration Date	Tax registration date.
Financial Report Date	The date of the most recent copy of the Organization's financial report that you have on file. This field can be searched to compile a list of Organizations that have not provided recent financial data. Then, you could generate mailing labels or a reminder letter to request more recent data.
Notes	The notes field can indicate that the Organization's 501(c)(3) letter is in the tax file. It could also provide the letter's date. This eliminates most reasons to look up the actual letter.

Field	Description
Charitable Organization	A flag indicating that the Organization is a public charity. The automatic Tax Status warning features only apply to Organizations flagged as charitable. If this flag is not turned on, the right portion of the screen is blank. Once it is turned on, the appropriate fields for tracking Tax Status are displayed.
Cumulative Index Revision/ Page No.	This field is used to record the date of the revision in which the Organization is found and the page number. This can make references to the listing much easier.
Last Verified By	The person who verified the information.
Last Verified On	The date on which the information was last verified.
Next Verification On	The date on which the information should be verified again. This information can be used to produce a list of Organizations whose Tax Status is due for verification.
Tax Status	A list of Tax Status values and their effective dates. Your administrator defines the available Tax Status codes. Because a single Organization may have more than one relevant Tax Status, there are several status fields. To define another Tax Status, click on the next field in the list, and select the Tax Status in the same manner.
As of	For each status, you can enter the appropriate "As of" date.

When the Tax Status information is complete, you can click on the other Organization tabs to work with or view other information—the Tax Status is saved automatically. If you are finished working with this Organization, click Save and Close to save the information and exit to the Organizer.

Background

The Background tab can provide incidental information about the Organization, including information about their background and mission, an A.K.A. (also known as) name, a Sort As name, Vendor Number, and whether or not the Organization is a United Way Organization.

To access the Background, open the Organization you wish to define or modify and click on the Background tab.

Field	Description
Background	An unlimited text field that can be included on the write-up used by the Board to review Requests for this Organization.
A.K.A.	A common name or acronym (such as UCLA for the University of California at Los Angeles) that can make it easier for users to find the Organization. If a user searches for the A.K.A. name instead of the proper name, they'll still be able to find the Organization. You can also enter an Organization's "old" name if it changes or if they merge with or are acquired by another Organization.
Sort as	The name used to sort the Organization for reporting purposes. The system calculates an appropriate sort name automatically by expressing numbers as text (SIX for 6), placing the entire name in upper-case characters, and moving any initial article (like "the") to the end (following a comma). For example, an Organization named "The Make a Wish Foundation" would be sorted under "T", but people looking for this Organization in a list or report would look under "M". The sort name "MAKE A WISH, THE" lists the Organization under "M" as expected.
Vendor No.	An optional, user-assigned identification number for the Organization; in general, your accounting department assigns Vendor Numbers.
Annual Budget	The Organization's annual giving budget.

When the Background information is complete, you can click on the other Organization tabs to work with or view other information—the Background is saved automatically. If you are finished working with this Organization, click Save and Close to save the information and exit to the Organizer.

Default Wire Transfer Information

If you routinely send payments to the Organization by wire transfer, you can enter the Organization's default account information on the Wire Transfer tab. You can keep track of one primary bank account, as well as any number of intermediary accounts, if necessary.

The following fields are available on the Wire Transfer tab for your primary bank account, as well as any intermediary accounts.

Recipient Bank Fields	Description
Name	The name of the bank to which the funds are being transferred.
Code	The ABA number identifying the bank.
Address	The street address of the bank.
City	The city of the bank's address.

Recipient Bank Fields	Description
State/County/Province	The state, county, or province of the bank's address. *The maximum number of characters for this field is 20.*
Postal Code	The postal or Zip code of the bank's address.
Country	The country in which the bank is located.

Recipient Bank Contact Fields	Description
Name	The name of the contact person at the recipient bank.
Phone	The phone number of the contact person at the recipient bank.

Recipient Account Fields	Description
Name	The name of the bank account to which the funds are being transferred.
Number	The account number of the recipient's account.

Applying Default Wire Transfer Information The default wire transfer information for your primary bank account *and* your intermediary accounts is transferred:

- to a Request for this Organization when you select the "Default all Payments to Wire Transfers" check box within the Request record.
- to a Payment for this Organization when you select the "Wire Transfer" check box within the Payment record.

Note: Default wire transfer information for the Request takes precedence over default information for the Organization with which the Request is

associated. For example; if you specify default wire transfer information for both an Organization and an associated Request, then create a Payment for the Request, the Request's wire transfer information is used for the Payment.

Tip: Your Administrator can also set preferences that automatically add default wire transfer information when you generate a Payment that is greater than a specified amount; or when the payee is in a specified country.

Updating Requests and Payments If you have already entered wire transfer information for an individual Payment—or for the Request with which the Payment is associated—the default wire transfer information that you enter in the Organization record *will not* overwrite it.

If you enter or change default wire transfer information that you want to apply to existing Requests and Payments, you should click Update Requests/Payments. Any Requests you have set to "Default all Payments to Wire Transfers" and any Payments flagged as wire transfers will be updated with the default information from the Organization record.

Intermediary Accounts An intermediary account is used as a way-point for funds that are transferred electronically. Depending on your accounting needs, you may wish to set up one or more intermediary account(s) for payments to an Organization.

Click Add Intermediary to add a new Intermediary tab, and then enter your intermediary account information. To delete an intermediary account, simply go to the appropriate tab in the Organization record, and click Delete.

Tip: If you would like to change the order of you intermediary account tabs, use the left and right arrow buttons (in the lower left corner of each intermediary tab) to move the tabs within the Organization record.

Organization Coding Sheet

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Contacts that allows you to choose classifications from a set of Categories defined by your GIFTS administrator. These classifications are displayed on the Coding tab of your Organization records.

The classification codes that have been added are indented. In this instance, the Organization has been coded so that it falls under the Program Area of Health & Human Services.

Note: Essential GIFTS does not utilize Organization Coding Sheets.

Tip: The Coding Sheet for an Organization can serve as the default Coding Sheet for the Requests that you enter for that Organization. If the Request Coding Sheet uses the same category as the Organization, the classifications that you enter for the Organization are automatically inserted into each new Request for that Organization.

Note: If your administrator specified any Categories on the Organization Coding Sheet as *required*, you cannot save a new Organization until you have entered a code in that category.

This section includes basic information about entering Coding Sheet data. For more comprehensive information, please refer to "Working with Coding Sheets" on page 29.

Adding Codes To classify the Organization, highlight the category in which you wish to supply a code and click Add. The codes defined for that category are displayed.

To add a code, highlight it and click Insert. The code is displayed on the Coding Sheet. To add a code to another category, you can click on it to display its coding without closing the Code Selection window. When you are finished adding codes, choose File ➤ Close from the Code Selection menu.

Primary and Secondary Codes Some Categories allow you to select more than one code. If more than one code is specified for a category, the *primary code* is displayed in blue, and the *secondary codes* are displayed in green.

For an explanation of how primary and secondary codes are used in GIFTS reports and correspondence, please refer to "Primary and Secondary Codes" on page 34. To make a secondary code the primary code within a category, highlight it and click the Primary button at the bottom of the Coding Sheet.

Removing Codes To remove a code, highlight it and click Remove.

When the Coding Sheet information is complete, you can click on the other Organization tabs to work with or view other information—the Coding Sheet is saved automatically. If you are finished working with this Organization, click Save and Close to save the Organization and return to the GIFTS Organizer.

Organization Affiliations

Affiliations are "pointers" between Organization records and the Contact records of the people who are involved with the Organization. There are also affiliations between Requests and Contacts, and you can affiliate a Contact with any Organization or Request in your system.

In Organization records, the Affiliations tab displays all primary and secondary Affiliations associated with 1) the Organization and 2) Requests associated with the Organization:

Click Edit Affiliation to open and edit the selected Affiliation record.

You can also click Add Affiliation to add a secondary Affiliation, or Edit Contact to edit the Contact referred to in the selected Affiliation.

The columns in the Affiliations tab of an Organization display the following data:

Column	Description
Contact	Lists the affiliated Contact's name, Affiliation Title, and Affiliation Address.
Request	For Request Affiliations, this column lists the Request's ID, Reference Number, Disposition, Disposition Date, and Project Title. Otherwise blank.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).
Notes	Any notes entered in the Affiliation record.

Column	Description
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Filtering Affiliation Records Filtering options are available above the grid:

Filter	Description
Role	Select from a list of Affiliation Roles to see only those Affiliations in which the affiliated Contact took that role.
Type	Limit the list to Organization Affiliations or Request Affiliations only. (Request Affiliations in this case would be all Affiliations for all Requests associated with the Organization.) Select <All> to see both types of Affiliations.
Include Closed Affiliations	Select this check box to include closed Affiliations in the list. Clear the check box to see only active Affiliations.

About Organization Affiliations

Important: General information about Organization Affiliations follows. For detailed information about accessing, adding, modifying, and deleting Affiliations, please see "Working with Affiliations" on page 375.

To keep track of all the people who are associated with an Organization, you can use Affiliations that link their Contact records to the Organization. An Affiliation links a Contact's record to the Organization and describes their role—such as Employee, Trustee, or Technical Advisor—in regards to that Organization. You can create as many Affiliations between the Contact and the Organization as are needed to describe his or her various roles.

From the Affiliations tab of an Organization, you can create new Affiliations and modify the Affiliations you have created. In addition to the Affiliations that you can create from the Affiliations tab, there are special types of Affiliations used by the system:

✔ Each Organization can have a Primary Contact

✔ Each Request can have a Primary Contact

✔ Each Contact can have a Primary Organization (usually their employer)

As described in "Entering an Organization Primary Contact" on page 155, when you identify an Organization's Primary Contact on the Organization tab of its Organization record, the system creates an Organization Primary Contact Affiliation identifying that person as the Organization's Primary Contact, and—if you created a new Contact—a Primary Organization Affiliation designating that Organization as the person's Primary Organization.

Regardless of the other Affiliations you create for an Organization or its Primary Contact, you can use these special records to keep track of these Primary Affiliations.

Please note that you cannot change the Organization or Contact specified in these records from the Affiliations tab:

- You can change or clear the Primary Contact for an Organization from the Organization tab, as described in "Changing the Organization Primary Contact" on page 157.
- You can change the Primary Organization for a Contact from within its Contact record, as described in "Primary Organization Affiliation" on page 356.

However, you can change the role that is used to characterize their relationship. For instance, the default role for a Contact's Primary Organization Affiliation is "Employee," since their Primary Organization is usually their employer. However, if the person is actually a Consultant, you can change the role specified in the Primary Organization Affiliation to "Consultant."

Important: The Standard Reports *always* use the Contact identified on the Organization tab as the Primary Contact, regardless of what role you use to describe their relationship and regardless of any other Contacts whose roles are "Primary Contact."

For instructions for adding and modifying an Organization's Affiliations, please refer to "Working with Affiliations" on page 375.

Organization Subsidiaries

If you work with Organizations that are subsidiaries of a larger parent Organization—such as academic departments within a university—you can link them to the parent Organization. You can then track Requests and Payments for the entire parent Organization as well as for its individual subsidiaries.

Subsidiary Organizations are displayed on the parent Organization's Subsidiaries tab.

Example: Franklin State University has two subsidiaries:.

Column	Description
Organization	The name of the subsidiary organization.
Primary Contact	The subsidiary's Primary Contact.
Also Known As	The subsidiary's AKA name, if any.
Legal Name	The legal name of the subsidiary.
ID	The unique, system-defined identification number assigned to the subsidiary Organization.
Audit	The dates on which the subsidiary Organization was created and last modified, and the Login IDs of the users that created and last modified it.

You can also define parent/subsidiary relationships between grantees and payees in the Payment record. For details, please see "Creating and Modifying Payments" on page 271.

When you create a Request for a subsidiary Organization, the parent Organization is also noted in the Request Detail information.

About Organization Subsidiaries

Subsidiary Organizations are united under a common parent Organization. In GIFTS, each subsidiary is an independent Organization with its own Contacts, Requests, and Payments. You can track information for the individual subsidiaries, as well as for the parent Organization.

Example: You fund proposals to a university's general fund as well as to its individual academic departments. Each department, and the university itself, are represented by individual Organizations in GIFTS. If you make the departments subsidiaries of the university Organization, you can easily generate reports for the individual departments as well as for the entire university.

When you link subsidiary and parent Organizations, their respective Organization records remain unchanged.

Adding a Subsidiary

Before you add a subsidiary you'll need to run a search for the Organization in your database. If the subsidiary Organization is already in GIFTS, you can link it to the parent. This helps you avoid duplicate Organizations in your database.

When you add a new subsidiary, you can copy the parent Organization's address, telephone number, and Tax Status to it—or you can enter this information manually. If the parent and the subsidiary have the same

address, you can link the subsidiary's address to the parent. Changes that you make to the parent address are reflected in the linked subsidiaries as well.

To add subsidiaries to a parent Organization:

1 From the Subsidiaries tab of the parent Organization, click Link/Add Subsidiary. The subsidiary Organization search is displayed.

The New button is disabled until you search for the subsidiary Organization.

2 Enter the subsidiary Organization's name and click Search.

- If matches are found, GIFTS displays a list of the Organizations that met the search. Select the subsidiary from the list and click OK. The subsidiary is added to the parent Organization.

- If no matches are found, click New. You are asked if you want to apply the parent Organization's information to the new subsidiary.

  If you click Yes, the parent's address, telephone number, Primary Contact and tax status are copied to the new subsidiary. If you click No, you can add the information manually. The Organization detail is displayed:

3 Edit the Organization information.

If you select 'Use Parent Organization Address,' GIFTS maintains a link between the parent and the subsidiary address. When you edit the parent address, the subsidiary address will be updated as well. (Note that this link is maintained for the parent *address* only. If you edit the telephone number, Primary Contact, or Tax Status information for the parent Organization, the subsidiaries are not updated.)

For more information about entering Organization detail and Tax Status information, refer to "Adding and Modifying Organizations" on page 151.

4 When you are finished, click Save and Close. The new subsidiary is added to the parent Organization.

Editing a Subsidiary

You can edit a subsidiary from its own Organization record, or from the Subsidiaries tab of the parent Organization.

To edit a subsidiary Organization from the parent's Subsidiaries tab:

1 Highlight the subsidiary and click Edit Subsidiary. The subsidiary Organization is displayed:

2 Edit the Organization Detail and Tax Status information for the subsidiary. If you want to edit other information—such as Wire Transfer or Background information—you must edit the subsidiary from the

Organization folder as described in "Adding and Modifying Organizations" on page 151.

3 When you are finished, click Save and Close.

Removing a Subsidiary

If you no longer want to track an Organization as a subsidiary, you can remove it from the parent Organization. When you remove a subsidiary, the link between the subsidiary and the parent Organization is removed, *the Organization records themselves are not deleted*.

To remove a subsidiary:

1 From the Subsidiaries tab of the parent Organization, highlight the subsidiary and click Remove Subsidiary. You are asked to confirm that you want to remove it.

2 Click Yes. The link between the subsidiary and the parent is removed.

Using Organization Alerts

An alert is a way of marking and annotating an Organization so that you can remind yourself or your colleagues of something important regarding the Organization. Exactly how Organization Alerts are used is up to you.

On Request records, users can click the alert icon beside the Organization's name to view the alert.

You can also choose whether you want the Alert Message to display when users open the Organization record or open Requests associated with that Organization. For example:

Posting an Alert

To post an alert:

1 Search for and open the Organization's record.

2 From the Organization menu, choose Action ➤ Alert. The Alert form opens:

Field	Description
Message	The alert text. If this field is left blank, no alert is posted.
Display Alert Message?	Enable this option to display the Alert Message each time a user opens the Organization record. Otherwise, users can click the Alert button to view the message.

3 Click OK to save the alert and return to the Organization record.

Removing an Alert Message

To remove an alert, open the Alert form, delete the message text, and click OK. Then, save the Organization. GIFTS cancels the alert.

Deleting an Organization

Deleting an Organization removes it entirely from GIFTS. Once an Organization is deleted, it cannot be recovered. GIFTS does not allow you to delete any Organization that is currently linked to one or more Requests. If you wish to delete an Organization with Requests, you must first delete the Requests.

If you accidentally created duplicate Organization records and wish to delete one, please refer to the *GIFTS Administrator's Guide* for information about automatically consolidating the Requests associated with duplicate records.

To delete an Organization:

1. Open the Organization record.
2. From the Organization menu, choose File ➤ Delete. You are prompted to confirm that you want to delete the Organization.
3. Click Yes. GIFTS searches to determine if any Requests are associated with this Organization. If any Requests are found, the deletion is stopped and you are notified that Requests exist. If no Requests are found, the Organization is deleted.

Researching an Organization

Viewing an Organization's Web site

If the Organization has a site on the World Wide Web, you can access it directly from the Organizer.

To view the Organization's Web site:

1. Highlight the Organization—or any record associated with the Organization, such as a Request or Contact—and choose Action ➤ Surf Web Page from the Main menu.

   ❖ If a Web site address was specified for the Organization, GIFTS opens the site in your Internet browser.

❖ Otherwise, GIFTS notifies you that no address was specified for the Organization.

If you know the Organization's Web site address, you can enter it here. In addition, if you have the permissions to edit Organizations, you can choose 'Update Organization with this www address' to add the address to the Organization record.

When you are finished, click OK. GIFTS opens the site in your Internet browser. If you chose to update the address, the WWW address that you entered is added to the Basic information on the first tab of the Organization record.

Researching an Organization's Non-Profit Status

To verify an Organization's non-profit status and gather other useful information regarding the Organization:

1 Highlight the Organization that you want to research and choose Action ➤ Research GuideStar from the Main menu.

GIFTS takes you to a Web site that provides detailed information on non-profit organizations. (The site that you use is selected by your GIFTS administrator.)

For example, if your administrator has set up your system to research organizations using GuideStar®—and a valid Tax ID is available—a summary of the Organization's non-profit status is displayed.

If no Tax ID is available, or the ID is not valid, you can search the site for information on the Organization.

9 Working with Requests

This chapter describes how to work with requests for funding, including how to enter, update, Approve, and Decline them.

In This Chapter

About Requests **178**
Searching for Requests **178**
About the Requests Folder **180**
Adding or Modifying a Request **182**
Decision Making **198**
Locking and Unlocking Requests **209**
Renewing Grants **211**
Amending a Grant **214**
Using Request Alerts **217**
Processing Batches of Requests **218**
Request Affiliations **229**
Transferring a Request to Another Organization **231**
Transferring Requests to Another Branch **232**
Deleting a Request **236**
Percentage Coding for GIFTS Requests **236**

About Requests

The term "Request" is the term the system uses for all requests for funding, regardless of their status or disposition. Grants, proposals, and declinations are all considered Requests.

The following types of information, although part of the Request information, are important enough to warrant their own folder in the Organizer and to have their own chapters in this manual. When necessary, please refer to the appropriate chapter to learn more about each.

- "Working with Payments" on page 261
- "Working with Requirements" on page 327
- "Generating Correspondence" on page 449

Searching for Requests

You can search for Requests using the search techniques described in "Searching for Data in GIFTS" on page 77. This section details each of the Quick Find search properties for Requests.

You can search on any combination of the following properties. Note that some of these properties, such as Approval Date, apply only to Requests of a specific disposition.

Property	Description
Approval Date	The date on which the grant was Approved.
Coding Sheet	Search the Request Coding Sheet. When you click this property, the Coding Sheet for Requests is displayed.
Declination Date	The date on which the Request was declined.
Declination Reason	The reason specified for the Request's declination.
Disposition	The disposition of the Request: Approved, Declined, or Pending.
Docket Number	The Request Docket Number (as entered on Page 1 of the Request record).
Grant Amount	The amount approved for the grant.
Grant Balance	The difference between the amount granted and the amount that has been paid on the grant.
Grants with Unscheduled Balances	Any Grants that have no payment schedules for their outstanding balances.
Meeting Date	The date of the Board meeting during which the Request will be or has been considered.
Organization's City	The city in the mailing address of the Organization that submitted the Request.
Organization's Country	The country where the Organization is located.
Organization's Name	The name of the Organization that submitted the Request. Depending upon options chosen by your administrator, the system searches for the Organization's name, A.K.A. name, sort name, legal name, or any combination of these four names.
Organization's State	The state in the mailing address of the Organization that submitted the Request.
Primary Contact's Last Name	The last name of the Request Primary Contact identified on Page 1 of the Request record.

Property	Description
Project End Date	For grants, the date on which the project is scheduled to end.
Project Start Date	For grants, the date on which the project is scheduled to begin.
Project Title	The title of the project, as specified on Page 1 of the Request record.
Recommended Amount	The recommended amount to be granted to a proposal.
Reference Number	The grant reference number.
Renewal Date	For grants, the date on which the grant is eligible for renewal.
Request Amount	The amount of the Request.
Request Date	The date of the Request.
Request ID	The unique, system-generated Request ID.
Request is Incomplete	The proposal has not been flagged on Page 1 as being complete.
Request Type and Status	The Request type—such as 'In-kind Giving' or 'Cash Grants'—to which the Request belongs, and its status within your workflow.
Staff	The member of your staff to which the Request is assigned.
Subdivision	The subdivision of the requesting Organization to which the Request belongs.
Term (Months)	The length of the grant (between the Project Start Date and the Project End Date) in months.

About the Requests Folder

The Requests folder of the Organizer provides a list of Requests that either met your search for Requests, or are related to another record currently

zoomed in the Organizer. The following is an example of the Requests folder display.

You can customize the format, sort order, and content of the information in the Organizer, as described in "Working with the Organizer" on page 37. By default, the following information is displayed in the Requests folder:

Column	Description
Locked Status	A padlock is displayed if the Request has been locked. If the lock is green, you can edit the Request. If it is red, you cannot.
Alert Status	A red exclamation mark is displayed if an alert has been posted for the Request. You can double-click on the mark to view the alert.
Disposition	The Request's Disposition (Approved, Declined, or Pending), the Disposition Date and—in parentheses—the Login ID of the staff member who is responsible for the Request. If the Request is Approved, the Project Start Date and End Date are also displayed.
Type/Status	The Request Type, such as 'Cash grants,' and Status, such as 'Ready for Decision.' The Request Type is determined when the Request is entered, and the Status indicates the Request's position in your workflow.

Column	Description
Organization	The name of the requesting Organization and the name and telephone numbers for the Primary Contact identified on Page 1 of the Request.
Req/Granted	This column displays the Requested Amount for items that are still Pending or which have been declined. For approved Requests, it displays the Grant Amount, the Paid Amount, the remaining Balance, and the term (in months) of the grant.
Project Title	The short Project Title.
Fund/Program	The Fund and Program Area (Level 1) identified on the Request's Coding Sheet.
ID/Ref	The unique, system-defined Request ID and the Reference Number, which—depending on preferences set by your administrator—was generated by the system or entered manually.
Audit	The dates on which the record was created and last modified, and the Login IDs of the users that created and last modified the record.

The listed Requests are color-coded to indicate their disposition, or whether they are incomplete. The colors and their meanings are:

Color	Description
Blue	Pending Request: the Request has been neither approved nor declined.
Red	Incomplete: the Request is missing critical information. The information is required before the Request can be approved.
Green	Approved: the Request has been granted.
Black	Declined: the Request has been rejected.

Adding or Modifying a Request

To add a new Request, you must first zoom in on the Organization that submitted the Request. GIFTS automatically associates the Request with the

zoomed Organization. This means that you must have entered the Organization record before you can enter any Requests for that Organization. For information about zooming, please refer to "Using the Zoom Feature" on page 47.

When you add a new Request, it is automatically assigned a disposition of Pending, meaning that it is awaiting a decision to be approved or declined.

Tip: If you are entering an immediate declination or historical grant, you can use the Quick Entry feature described on page 159.

To add a new Request, zoom in on the requesting Organization, and then do any one of the following:

- Go to the Requests folder and click the New button on the Folder toolbar.

- Click the New Request button on the Main toolbar.
- Choose File ➤ New ➤ Request from the Main menu.

To modify an existing Request, select it in the Requests folder and choose File ➤ Open from the Main menu.

The Request record is displayed.

You can click the underlined Organization name to open the Organization record.

Click the associated Contact's name to open the Contact record.

Branch Selection for Requests If you are using branch security for the *centralized* data entry model, and you are adding a new Request, you will see an additional field called 'Branch' above the Request Date field. The field defaults to the branch associated with user creating the Request, but can be changed. For information on the centralized data entry model, please see "About Branch Security" on page 238 in the *Administrator's Guide*.

The Request is divided into the following tabs:

Folder	Description
Page 1	Basic information on the Request, including its Type, Disposition, Status, the name of the requesting Organization and Primary Contact, the Request Date, Project Title, Staff member assigned, Secondary Staff, and Project Budget. Pending Requests display relevant information like the Meeting Date and the Recommended Amount. When the Request is Approved or Declined, this information is moved to Page 2, and is replaced by approval or declination information.
Page 2	This screen contains a long Project Description and Evaluation. After the pending Requests has been approved or declined, the pending information, such as the Meeting Date and the Recommended Amount, are moved here.

Folder	Description
Coding	The Coding Sheet that you have defined for Requests, with all of the relevant classifications for categorizing each Request.
Affiliations	In addition to the Primary Contact, each Request may be associated with any number of Contacts. This tab displays the associated Contacts, and allows you to add, modify, and delete Affiliations.
Payments	A Payment Schedule is created detailing the payments to be made on the grant. For more information on Payment Schedules, please refer to "The Request Payment Schedule" on page 266. You can also define default wire transfer information for Payments associated with the Request.
Requirements	Most grant makers have certain requirements that are placed on the grantee at the time a grant is awarded. You can view these Requirements on the Requirements tab.
Activities	You can view all of the GIFTS Activities associated with a Request on the 407.

For more information, you can refer to the following sections:

Request Detail (Page 1) **185**
Request Detail (Page 2) **190**
Request Coding Sheet **191**
Request Affiliations **195**
Payments: Wire **196**
Working with Payments **261**
Working with Requirements **327**
Working with Activities **407**

Request Detail (Page 1)

The Request Detail screen contains the basic information for each Request. You cannot save a Request until you have entered its Request Date.

The information displayed on the Page 1 tab is different depending upon the disposition of the Request. The information for approved and declined items is discussed in the sections "Approving a Request" on page 202 and "Declining a Request" on page 199. This section discusses Page 1 as it appears for Pending Requests.

Basic Request Information Fields Below is a description of each of the fields on this screen for a pending Request:

Field	Description
Type	The type of Request. Grant makers often use only the standard type of 'Cash Grants.' Other grant makers, particularly corporate giving programs, may have additional types, such as 'Memberships' or 'Dinners.'
Status	The current status of the Request. Status codes are defined in relationship to the Request type and disposition.
Organization	The Organization for the Request. When a new Request is created, this is the zoomed-on Organization. It is possible to transfer a Request to a different Organization if necessary; please refer to "Decision Making" on page 198.
Subdivision	A department or subdivision of the requesting Organization, if applicable.

Field	Description
Contact	The Primary Contact for the Request defaults to the Primary Contact for the Organization. If you wish to supply a different Primary Contact, please refer to “Changing the Request Primary Contact” on page 188.
Project Title	A short description of the project. An unlimited field for a longer description of the project and any other pertinent text is available on Page 2.
Staff	The staff member responsible for this Request.
Secondary Staff	Assign a secondary staff member to assist with the request or assume responsibility when the main staff member is not available.
Project Budget	The total project budget of the Request, which is not necessarily the same as the amount being requested.
Disposition	This area displays the current disposition of the Request, either Pending, Approved, or Declined. Requests are assigned a disposition of Pending when they are first created. It is changed to Approved when the Request is approved, or Declined when the Request is declined.
Request Date	The date on which the Request was made, usually the date of the proposal or the date on which it was received.
Requested Amount	The total amount requested by the Organization.
Recommended Amount	The amount recommended by the staff for approval.
Pledge?	Many grant makers wish to report separately on pledges, or grants that span more than one year. Select this option if the Request is a pledge.
Term (Months)	The term of the grant, in months (the default is “12”).
Project Start Date	The date on which the project is scheduled to begin.
Project End Date	The date on which the project is scheduled to end.

Field	Description
Reference Number	Your GIFTS administrator can set an automatic counter that assigns these numbers when Requests are created or approved. Otherwise, you can enter them manually. If you enter a Reference Number manually and GIFTS is set to assign them automatically, GIFTS *does not* overwrite the number you enter. Note that once GIFTS automatically assigns a Reference Number, only users in the Admin user group can change it.
Meeting Date	The date of the meeting during which the Request will be reviewed, or has been reviewed.
Docket Number	Many grant makers assign Docket Numbers to Requests to be reviewed at the Board meeting. The Docket Number can be used for sorting in reports for presentation to the Board, and for easy reference after the meeting to record the results. Please note that the Docket Number is a text field, so the system sorts Docket Numbers alphabetically rather than numerically.
Complete?	Is this Request complete? The default setting is determined by your administrator. If the Request is not complete, the check box should be empty; a field appears below for you to record the specifics of why the Request is incomplete. Incomplete Requests appear in red in the Requests folder, and cannot be approved until they are marked as complete.
Notes	If you mark the Request as incomplete, this field appears so you can note why the Request is not complete, and any other information.

When the Page 1 information is complete, click on one of the other Request tabs to enter or modify additional information, or click Save and Close to return to the Organizer.

Changing the Request Primary Contact The Request's Primary Contact is the person with whom you have the most contact for the Request. This person is identified by a Request Primary Contact Affiliation—a special type of Affiliation used to identify the person as the Request's Primary Contact. (For more information about Affiliations, please refer to "Request Affiliations" on page 195.)

By default, the Primary Contact for the Request is the Primary Contact for the Organization that submitted the Request. To choose another Primary Contact from your Contacts folder, you can click the Find button beside the Primary Contact's name. A search window is displayed.

To find a Contact, choose a search condition from the list on the left and enter the name you are searching for into the field on the right. Then, click Search:

- If a match or matches are found, a list of the matches is displayed. If none of the matches are correct, you can modify the search. To choose a Contact from the list, highlight their record and click OK. GIFTS creates a Request Primary Contact Affiliation between the Contact and the Request, and the new Contact is identified on Page 1 of the Request.
- If GIFTS did not find a matching last name, or if you rejected the matches it did find, you may create a new Contact by clicking the New button. Fill in the New Contact form and click Save and Close. The Primary Contact for the Request will be replaced with the new Contact you just created.

Note: If there are any Payments or Activities assigned to the previous Primary Contact that are open (scheduled at a future date), GIFTS notifies you and asks whether you wish to transfer these items to the new Primary Contact. If you choose to transfer the items, only the open items listed are transferred to the new Contact; closed items are not affected.

Clearing the Request Primary Contact You can clear the Primary Contact information, leaving the Request with no Primary Contact. To do so, choose Action ➤ Clear Contact from the Request menu.

You are prompted to confirm that you wish to clear the Primary Contact information. Click Yes. The Request Primary Contact Affiliation for the Primary Contact is deleted. Note that the other Affiliations for that

Contact—including his or her Primary Organization Affiliation—are not changed.

Request Detail (Page 2)

Page 2 of the Request contains a long Project Description and, for approved and declined Requests, the Pending information previously shown on Page 1 of the Request while it was pending.

In the Project Description - Long field you may expand on the short Project Title from Page 1. In the Evaluation - Long field, you can enter your evaluation of the Request. This information can be included in write-ups and other reports that help you prepare for your Board meetings.

If the Request has been approved, you can enter renewal information about the grant; for more information, please refer to "Renewing Grants" on page 211.

Depending on your GIFTS system settings, pending Requests may include a Fiscal Year field below the Renewal Information section:

The Fiscal Year field displays the fiscal year in which the Schedule Date fell when the Request was created. It is not updated if the Schedule Date changes, only when and if the Request is approved.

Note: In approved Requests, Fiscal Year appears on Page 1 of the Request record. For more details on Fiscal Year in approved Requests, please see "Approving a Request" on page 202.

If your permission set allows you to update the Fiscal Year field in Requests, you can enter a different fiscal year. Otherwise, the field is read-only.

When the Page 2 information is complete, you can click on the other Request tabs to work with or view other information, or click Save and Close to return to the Organizer.

Request Coding Sheet

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Requests that allows you to choose classifications from a set of Categories defined by your GIFTS administrator. These classifications are displayed on the Coding tab of your Request records.

Example: For instance, to classify a Request you could choose the "Civic and Community" classification in the "Program Area" Category.

The classification codes that have been added are indented. In this instance, the Request has been coded so that the Type of Support is Program Support.

Your GIFTS Administrator can specify categories on your Request Coding Sheet as being *required*. In that case, you must enter required codes before you can either create or Approve a Request.

This section includes basic information about entering Coding Sheet data. For more comprehensive information, please refer to "Working with Coding Sheets" on page 29.

Tip: "Working with Coding Sheets" on page 29 includes time-saving data entry tips that can greatly ease the coding process.

Percentage Coding in Requests

If at least one code table is enabled for percentage coding, the Coding tab of a Request will display two additional columns. One column will be for Percentage and the other for Amount. Only enabled code tables will display values in these columns.

You can enter a value in either column and the system will automatically calculate the associated value when you tab or click out of the field.

Red subtotals represent categories that are over or under 100% allocation.

Percentage Coding Validation

The following validation rules apply when saving and closing the Request:

- The first code specified within a category will be set to 100% with the full request/grant amount.
- The second code selected will be assigned 0%. The fields will become editable from this point onwards.
- If only two codes are specified, changing one will automatically recalculate the other.
- If more than two are set, no automatic adjustments will be made.
- Percentages only support whole numbers.

If a category's subtotal is not 100% of the Request/Grant amount, you will not be able to Save & Close.

Adding Codes To classify the Request, highlight the category in which you wish to supply a code and click Add. The codes defined for that category are displayed.

To add a code, highlight it and click Insert. The code is displayed on the Coding Sheet. To add a code to another category, you can click on it to display its coding without closing the Code Selection window. When you are finished adding codes, choose File ➤ Close from the Code Selection menu.

Primary and Secondary Codes Some categories allow you to select more than one code. If more than one code is specified for a category, the *primary code* is displayed in blue, and the *secondary codes* are displayed in green.

For an explanation of how primary and secondary codes are used in GIFTS reports and correspondence, please refer to "Primary and Secondary Codes" on page 34. To make a secondary code the primary code within a category, highlight it and click the Primary button at the bottom of the Coding Sheet.

Removing Codes To remove a code, highlight it and click Remove.

When the Coding Sheet information is complete, you can click on the other Request tabs to work with or view other information—the Coding Sheet is saved automatically. If you are finished working with this Request, click Save and Close to save the Request and return to the GIFTS Organizer.

Request Affiliations

Affiliations are "pointers" between Request records and the Contact records of the people who are involved with the Request. Since Requests are associated with the Organizations that submitted them, the Request Contacts are in turn affiliated with the Organization that submitted the Request. You can affiliate a Contact with any Organization or Request in your system.

In Request records, the Affiliations tab displays all primary and secondary Affiliations associated with the Request:

For information about viewing, adding, and modifying Affiliations for a Request, please refer to "Request Affiliations" on page 229.

Payments: Summary

For information on Payments and managing the Payment Schedule for a grant, see "Working with Payments" on page 261.

Payments: Currency

If you engage in international gift-giving, you may want to track the value of your grants and Payments in recipient Organizations' home currencies. If

Payments have already been calculated in another currency, the data is displayed here:

For details about multi-currency features, please see "Multi-Currency in Requests and Payments" on page 297.

Payments: Wire

If payments for a Request are made by wire transfer, you can enter default wire transfer information for a primary bank account, as well as any number of intermediary accounts. For details on intermediary accounts, please see "Default Wire Transfer Information" on page 189

A Request will automatically be populated with the Organization's default wire transfer information when you select the "Default all Payments to Wire Transfers" check box within the Request record. Similarly, a Request's default wire transfer information is automatically added to each of its Payments when you manually flag them as wire transfers. For details, please see "Paying a Payment" on page 281.

Note: Default wire transfer information for the Request takes precedence over default information for the Organization with which the Request is associated. For example; if you specify default wire transfer information for both an Organization and an associated Request, then create a Payment for the Request, the Request's wire transfer information is used for the Payment.

Important: Whenever you make changes to the default wire transfer information for a Request, the information is not automatically updated in the associated Payment records. If you would like to apply your changes to Payments, click Update Payments in the Request record.

To specify default wire transfer information for a Request:

1 From the Payments tab of the Request, click Wire (Wire Transfer, if the Currency tab is not enabled).

Note: You can only view this tab and make edits to this information if you have the appropriate permissions.

2 Enter the default wire transfer information. When you are done, you can click another tab or click Save and Close to save the Request.

Tip: Your Administrator can also set preferences that automatically add default wire transfer information when you generate a Payment that is greater than a specified amount; or when the payee is in a specified country.

Requirements and Activities

For information on Grant Requirements, see "Working with Requirements" on page 327. For information on Activities, see "Working with Activities" on page 407.

Decision Making

When you first enter a Request, it is automatically entered with a disposition of Pending, meaning that it is awaiting a decision on whether it will be approved or declined.

In addition, Requests can undergo periodic status changes. For instance, your review of pending Requests may involve distinct stages: first proposals are reviewed by a program officer, and then they are reviewed at a staff meeting before they are put on the docket for the Board meeting.

In this case, the Request would first have a status of 'Officer Review,' then 'Staff Review,' and finally 'Considered for Board.' When the Request moves from one stage to another, you can change its status in GIFTS. For more information please refer to "Request Type, Disposition, and Status" on page 8.

You can also restrict access to Requests at any point in your workflow by locking them. When you lock a Request, other users can view but not edit the Request and the Payments, Activities, Requirements, or Documents associated with it.

For example, you can lock all Requests that are on the docket for your next Board meeting. When the Board has approved or declined the Requests, you can unlock them so your staff can make the necessary changes. Or you can ensure the integrity of your historical grant information by locking Requests once they are approved.

For more information, please refer to the following sections:

Declining a Request **199**
Approving a Request..... **202**
Rolling a Request Back to Pending..... **206**

Changing the Status of a Request **207**
Locking and Unlocking Requests **209**
Renewing Grants **211**
Amending a Grant **214**

You can also process Requests in batches. For more information, please refer to "Processing Batches of Requests" on page 218.

Declining a Request

When you decline a Request, you can record the declination date, a declination reason, and other pertinent information. You can also decline a batch of Requests together, as described in "Declining a Batch of Requests" on page 219.

In general, only pending Requests are declined. However, in some cases, if a grant was approved prematurely or a similar error was made, you may wish to decline an approved Request. GIFTS allows you to do so; however, be sure that you take into account any Payments that have already been scheduled for the grant.

Note: You cannot decline a grant if Payments have already been paid for it. To decline the grant, you must first void these Payments. For information about voiding Payments, see "Voiding a Payment" on page 285.

You can decline a Request directly from the Organizer or from within the Request record, as follows:

- In the Organizer, highlight the Request and choose Action ➤ Decline from the Main menu.

❖ Open the Request and choose Action ➤ Decline from the Request menu.

You can enter the following information for the declination:

Field	Description
Date	The date on which the Request is being declined. This field defaults to the Meeting Date, if available, or to the current date.
Reason	The reason the Request is being declined.
Status	If you assign status codes to declinations, you can choose the appropriate status here.
Meeting Minutes	The part of the minutes from the meeting at which this Request was declined (if any). This information can be included in Board Meeting Minutes reports produced for the Board's next meeting.
Declination Notes	Any additional notes you wish to make regarding this declination.
Close Affiliations	Select this check box to close Affiliations between this Request and the Contacts associated with it. The system will use the current date as the End Date of the Affiliation, when declination is complete.

When you are finished, click OK. Page 1 of the Request is updated to display the declination information, and the disposition of the Request becomes Declined:

Proposal information is moved to Page 2:

When Requests are rejected, most grant makers produce a form letter and send it to the requesting Organization in order to notify them that their Request has been declined. Your standard letters for this purpose should have been entered as merge templates into GIFTS by your administrator.

For more information about producing merged letters, please refer to "Generating Correspondence" on page 449.

Approving a Request

When you approve a Request, you can record the grant amount, the grant date, and other important information. You can also Approve a batch of Requests together, as described in "Approving a Batch of Requests" on page 220.

Please note that you cannot approve pending Requests that are marked as "Incomplete." If the Request is currently incomplete and you wish to approve it, click on the Request Information is Complete check box on Page 1 of the Request.

You can approve a Request directly from the Organizer or from within the Request record, as follows:

- In the Requests folder of the Organizer, highlight the Request and choose Action ➤ Approve from the Main menu.
- Open the Request and choose Action ➤ Approve from the Request menu.

The Approval Wizard guides you through the grant approval process.

1 You can enter the following Award Information for the approval:

Field	Description
Date	The date on which the grant is awarded. Stored in the Approved Date field of approved Requests, this date is used to calculate the grant's fiscal year. Fiscal year is used for calculations in some standard financial reports.
Fiscal Year	This field only appears in the Approval Wizard if your GIFTS preferences specify that grant Fiscal Year is based on Request Approved Date. If they do, then this field defaults to the fiscal year in which the Date above (i.e., the Approved Date) falls. If your permission set allows you to update the Fiscal Year field in Requests, you can enter a different fiscal year. (Please note, however, that this may affect your financial reporting.) Otherwise, the field is read-only. NOTE: The Fiscal Year value for this Request may be updated automatically when and if the Approved Date is later changed. Contact your GIFTS administrator to find out how your system is set up to handle such a change.
Amount	The *total* amount awarded. Even if only a portion of the grant is to be paid in the current year, the total grant amount should be Approved. On the Payment Schedule you can specify the amounts to be paid each year.
Meeting Minutes	The relevant part of the minutes from the meeting at which this request was approved, if any. This information can be included in Board Meeting Minutes reports produced for the Board's next meeting.
Reference #	If you track your Requests using an internal numbering system (other than the system-assigned Request ID), you can enter the grant's reference number here. If GIFTS is set to automatically assign a Reference Number, this field is disabled. Note that when GIFTS automatically assigns a Reference Number, only users in the Admin user group can change it.

When you are finished, click Next.

2 You are prompted to enter the following project information for the approval

Field	Description
Term	The term of the grant, in months.
Starting	The start date of the grant, which is often but not always identical to the grant date. Defaults to the grant date.
Ending	The date on which the grant ends. The default is based on the grant date and the grant term entered.
New Status	The new status of the grant. Most grant makers assign a status of 'Active' to grants that are still in the grant term, and change the status to 'Closed' when the grant ends.

When you are finished, click Next.

3 The Approval Wizard now asks you for information concerning the Request's payment schedule.

❖ If Payments have already been scheduled for the Request, the Wizard notifies you. Click Next to skip this step.

❖ Otherwise, you are given the opportunity to automatically schedule Payments for the Request.

If you chose to automatically create a payment schedule, GIFTS generates the Payment(s) that will be made on the grant and schedules any Requirements that are due from the grantee. The schedule is based upon the grant term, payment frequency, and number of payments that you enter.

Field	Description
Frequency	Determines the frequency of payments: monthly, bi-monthly, quarterly, semi-annually, or annually.
# of Payments	If you enter "1," GIFTS creates one Payment for the full amount scheduled to be paid the same date as the grant date. If you enter a number greater than "1," GIFTS splits the grant amount evenly over the number of payments specified.
1st Payment Date	The Payment Schedule Date of the first (or only) grant payment. By default, this is the same as the grant date.
Payment Type	Select a type from the list. If your administrator defined a default payment type, it is displayed here. If the default does not apply to the Payment that you are creating, select another payment type from the list.

Field	Description
G/L Account	If you use a general ledger accounting system, you can select the G/L account with which the Payment is associated. If your administrator defined a default G/L account, it is displayed here. If the default does not apply to the Payments that you are creating, select another account from the list.

You can also manually schedule Payments for a Request. For details, please see "Paying a Payment" on page 281.

4 If you track the value of Requests and Payments in another currency, select the currency options in the next Approval Wizard screen.

Note: This page of the Approval Wizard will not appear if your administrator has not set up the local/other currency feature. For details on using these multi-currency features, please see "Multi-Currency in Requests and Payments" on page 297.

5 Click Finish to approve the Request. Page 1 of the Request updates to display the approval information, and the disposition of the Request changes to Approved.

Note: If you are using the optional Budget Module and elected to create Payments, you are prompted to resolve these Payments against the budget. (Please refer to the *Budget Module User's Guide* for more information.)

The proposal information fields, including the Request Amount and Docket Number, are moved to Page 2 so that Page 1 can display grant information fields like the Project Start Date. Note that Grant Renewal information fields are also added to Page 2.

Rolling a Request Back to Pending

If you prematurely approve or decline a Request, you can roll its disposition back to Pending. For Requests that have been approved, GIFTS will check to ensure that there are no outstanding Payments:

- If you are using the optional Budget Module and you roll back a grant with Payments resolved against the budget, the resolved amount is returned to the committed amount in your budget. For details, please refer to the *Budget Module User's Guide*.

- You can roll back a Request with scheduled Payments, *provided they are not marked as Paid*. If Payments for the Request are marked as Paid, you must void them before you can roll back the Request.

For more information about handling Payments, please refer to "Working with Payments" on page 261.

To roll back an approved or declined Request:

1. In the Requests folder of the Organizer, highlight or open the Request.
2. From the Request menu, choose Action ➤ Rollback to Pending. You are prompted to confirm your intentions.
3. Click Yes to continue, or No to cancel the rollback. If GIFTS cannot roll back the Request, you are informed by a message. Otherwise, you are informed that the Request has been rolled back to Pending.

Percentage Coding with Request Approval or Rollback to Pending

When a Request is approved or rolled back to Pending, and the Grant amount changes, the system will automatically adjust the percentage coding amounts on the Coding tab.

Changing the Status of a Request

Requests may undergo periodic status changes as they move through your organization's workflow. For instance, your review of pending Requests may involve distinct stages: review by a program officer, followed by review at a staff meeting, and then placement on the docket for the Board meeting.

In this case, the proposal could first have a status of 'Officer Review,' followed by 'Staff Review,' and then, finally, 'Ready for Board.' When the proposal moves from one status to the next, a status change can be performed.

You can change the status of a Request simply by opening the Request record and changing the entry in the Status field. However, if you perform a

status change action, GIFTS also records an Activity regarding the status change.

To change the status of a Request:

1 In the Requests folder of the Organizer, highlight the Request.

2 From the Main menu, choose Action ➤ Status Change. You are prompted to choose a new status:

You can enter the following information about the status change:

Field	Description
Date	The date of the Activity record posted to indicate that the status change took place. The Disposition Date of the Request is not changed.
New Status	As chosen from the available codes for the current Request type and disposition, the new status that describes the Request's position within your workflow.
Notes	The notes for the Activity to be posted regarding this status change.

3 Click OK. The status of the Request is updated, and an Activity record is created to record the event.

Uploading Updated Request Statuses to IGAM

Note: This feature only appears if you have IGAM 4 or later.

Since the Request status now appears on applicant's My Account page, you can upload updated statuses of any Requests from GIFTS to the IGAM server. This allows applicants to have the most up-to-date information about the status of their Requests.

To upload the status of Requests from GIFTS:

1. Select one or more Requests.
2. From the Action menu, select Upload Status to IGAM.
3. Select whether you want the status updated for selected Requests only, or since the last upload.
4. Click OK.

Locking and Unlocking Requests

When you lock a Request, other users can view but not edit the Request and the Payments, Activities, and Requirements associated with it. You can also lock the Documents associated with the Request.

For example, when Requests are ready to present to your Board, you can restrict users from editing the Requests by locking them. After the Board has reviewed the Requests, you can unlock them so that users can make any necessary changes.

In addition, you can ensure the integrity of your historical grant information by locking Requests once they are approved.

Locked records display the lock icon in the Organizer. If the lock icon is red, you cannot edit the record. If the lock icon is green, you can edit the record. You can edit locked records if:

- You are a member of the Admin user group.
- You have staff override permission and the record is assigned to you.

Users with the proper permissions can lock or unlock Requests and Documents. For more information on permissions, please refer to the *GIFTS Administrator's Guide*.

To Lock a Request

1. In the Organizer grid, open the Request or highlight it.

2 From the menu, choose Action ➤ Lock. You are prompted to confirm that you want to lock the Request.

3 Click Yes to continue. You are prompted to choose whether you wish to lock all Documents associated with the Request.

- ❖ Click Yes to lock all documents linked to the Request. The process log lists the Request and the Documents you have locked.
- ❖ Click No if you want the Documents linked to this Request to remain unlocked.

Note: You can lock individual Documents in the Documents folder. For more information, please refer to "Locking Documents" on page 482.

Tip: If the Locked column is not displayed in the left-most column of the Organizer grid, you can add it by choosing View ➤ Show Columns and clicking Reset Defaults.

To Unlock a Request

1 Open the Request or highlight it the Organizer grid.

2 From the menu, choose Action ➤ Unlock. You are prompted to confirm that you want to unlock the Request.

3 Click Yes to continue. You are prompted to choose whether you wish to unlock all Documents associated with the Request.

- ❖ Click Yes to unlock all documents linked to the Request. The Process monitor lists the Request and the Documents you have unlocked.
- ❖ Click No if you want the Documents linked to the Request to remain locked.

Note: You can unlock individual Documents in the Document folder. For more information, please refer to "Unlocking Documents" on page 482.

Renewing Grants

You can "renew" ongoing grants by creating a new Pending Request record based on the information from the original grant, thereby eliminating the need to re-key most grant information. When you specify that a grant can be renewed, you can also define the date on which it can be renewed.

The following information is carried over to the new Request when a grant is renewed:

- Organization information
- Primary Contact information or, if desired, all affiliated Contacts
- Project Title and Long Project Description
- Request Amount
- Recommended Amount
- Staff assignment
- All Coding Sheet classifications
- The Request ID of the new Request is preserved as the Request ID of the previous Request, with the addition of an extension.

  Example: Request 19 is renewed as Request 19.01. If Request 19.01 is subsequently renewed, it will be assigned a Request ID of 19.02, and so forth.

  - Customizer fields (optional)

Specifying Renewal Eligibility

The Renewal Information fields on Page 2 of an approved Request specify whether a grant is eligible for renewal, and the date on which the grant is eligible for renewal:

The renewal information will not be specified for any Requests that have not been created through the renewal process, or for which this information has not been updated manually.

1. To indicate that the Request can be renewed, select the "Allow this request to be 'renewed'" check box. The date field directly below this option is enabled.
2. To specify the date on which this Request becomes eligible for renewal, enter the appropriate date in the date field.
3. Click Save and Close to save your changes to the Request.

To Renew a Grant

1. In the Requests folder of the Organizer, highlight or open the Request.

   Tip: To find renewable grants, you can use the Requests Quick Find to search the Renewal Date property of your grants.

2 From the menu, choose Action ➤ Renew.

- You can choose for the new Request to be the same type as the original grant, or you can choose a different type.
- To specify a status for the new Request, choose the appropriate code in the Request Status field (only status codes for the Request type chosen are available).
- By default, the only Contact renewed is the Request Primary Contact identified on Page 1 of the Request. If you wish for the Contacts listed on the Affiliations tab of the Request to be carried over, select the "Carry over all non-primary contact affiliations" check box.
- If the new Request should be available for renewal at a certain point, select the "Allow this request to be subsequently 'renewed'" check box. (If this option is not set, and you subsequently wish to renew the Request, it can be set manually on Page 2 of the Request later.) Then, specify the date at which the new Request will be eligible for renewal. This date defaults to one year after the current date.
- You can choose to copy over existing Customizer fields by clicking Custom Fields and selecting the Customizer fields you would like to include in the new Request. If you choose a new Request Type, any Customizer fields for this Request that you copy over that do not exist in the new Request Type will not contain data from the original Request.
- The Renewal Activity fields determine the contents of the Activity record created by the Renewal process. This record is associated with

the new Request, and indicates the date on which the grant was renewed, the user responsible, and notes regarding the renewal. You can change the default information for the following options:

To change the staff member associated with the Activity record, use the Staff field. This does not change the staff for the Request, which defaults to the staff assigned to the original grant.

- To change the date reported in the Activity record, use the Date field.
- By default, the Activity notes indicate that the activity is a renewal, and specify the ID of the previous grant. Use the Notes field to add additional information to this note.

3 Click OK. The grant is renewed. Note that the renewal fails if any of the following conditions are found by GIFTS:

- The Request does not have a Disposition of Approved.
- The Allow this Request to be Renewed option on Page 2 of the Request record is disabled.
- The "on or after" date that determines when the grant is eligible for renewal has not passed yet.
- The Request has already been renewed.

Listing All Grants in a Series of Renewals

Since the Request ID of the new Request includes the Request ID of the previous Request (with the addition of an extension), you can use the Requests Quick Find to search for all of the grants in a series of renewals. Simply specify the Request ID property of your search as "starting with" the original Request ID.

Amending a Grant

Occasionally, the award amount of a grant may change. The amount originally awarded to the grantee may increase, or a future Payment may be

canceled, decreasing the total Grant Amount. When you amend the amount of a grant, GIFTS maintains the original amount as historical data.

Grant Amendments are triggered when you make changes to a grant's Payment Schedule that affect the total Grant Amount, such as the addition of a new Payment. You are automatically prompted to by GIFTS to perform a Grant Amendment to accommodate the change.

Example: You are prompted to amend a grant when you create a Payment that would increase the Grant Amount by $2,000:

In addition, you can open a Request and choose Action ➤ Amend Grant from the menu to amend its Grant Amount:

Field	Description
In the Grant Amount section of the Grand Amendment window:	
Grant Amount Current	The amount of the grant prior to the amendment that you are performing.
Grant Amount Amended	The new amount of the grant. GIFTS supplies the *total* amount of the new Payment Schedule, not the amount of the amendment.
In the Grant Term section of the Grand Amendment window:	

Field	Description
Term in Months	The new term of the grant—often the awarding of additional funds is concurrent with an extension of the grant. Update this field to reflect any changes in the Grant Term.
Start Date	The Start Date of the grant—in general, the Start Date is not affected by Grant Amendments.
End Date	The End Date of the grant—GIFTS updates this field to reflect any change you make to the Grant Term.
In the Activity section of the Grant Amendment window:	
Activity Date	GIFTS logs a historical Activity record for the amendment. You can post the Activity date as the actual date of the amendment (which may be different from the current date).
Fiscal Year	The fiscal year of the Grant Amendment Activity. The default value for this field is the fiscal year in which the Activity Date above falls. If your permission set allows you to update the Fiscal Year field in Activities, you can change the fiscal year. (Please note, however, that this may affect your financial reporting.) Otherwise, the field is read-only.
Notes	GIFTS records these notes in the Activity record created for the event.

Click OK to save the amendment.

Percentage Coding with Grant Amendments

Amending a Grant will prompt the user to amend the allocations by opening a form entitled Grant Amendment - Adjust Percentage Coding.

In order to proceed, percentages will have to be manually adjusted to account for the new Grant amount.

Using Request Alerts

An Alert is a way of marking and annotating a Request so that you can remind yourself or your colleagues of something important regarding the Request. Exactly how Request Alerts are used is up to you.

You can choose whether you want the Alert Message to display when users open the Request record. For example:

Posting an Alert

To post an alert:

1 Search for and open the Request's record.

2 From the Request menu, choose Action ➤ Alert.

Field	Description
Message	The Alert text. If this field is left blank, no Alert is posted.
Display Alert Message?	Enable this option to display the Alert message each time a user opens the Request record. Otherwise, users can click the Alert button to view the message.

3 Click OK to save the Alert and return to the Request record.

Removing an Alert Message

4 To remove an Alert, open the Alert window, delete the message text, and click OK. Then, save the Request. GIFTS cancels the Alert.

Processing Batches of Requests

You can Approve, Decline, change the Status of, lock, unlock, and Renew a group of Requests at once.

By necessity, batch processes limit the amount of detail that can be provided or modified for each individual record. Where necessary, GIFTS applies standardized data to every Request processed in a batch.

You cannot batch process Requests with different Dispositions. If you select Requests with different Dispositions for a batch process, an error message is displayed.

To select a group of Requests for batch processing, use a search or zoom to display them in the Organizer grid and highlight the Requests that you wish to process. It's all right if Requests you do not wish to include in the batch are displayed in the folder—you can easily exclude these Requests.

To highlight more than one Request, hold down CTRL as you click on the Requests or use the Select All option. Each Request you click on is highlighted, and you can de-select Requests by clicking on them again.

Declining a Batch of Requests

Before You Begin: Since the declination information you provide for a Batch Declination applies to every record in the declination, be sure to choose only those Requests that have identical declination information.

1 In the Requests folder, highlight all of the Requests you wish to Decline.

2 Choose Action ➤ Decline from the Main menu.

You can enter the following information about the Declinations:

Field	Description
Date	The date on which the Requests are being declined. The default is the current date.
Reason	The reason for the declinations. Every Request in the batch is assigned the same Declination Reason.

Field	Description
Status	If you assign Status codes to declinations, you can choose the appropriate status code here. If the Requests are not of the same Type, no Status is assigned because different Request Types do not share Status codes.
Meeting Minutes	Every Request in the batch is assigned the Meeting Minutes you enter here.
Declination Notes	Any notes you wish to make regarding the Declinations.
Close Affiliations	Select this check box to close Affiliations between these Requests and the Contacts associated with them. The system will use the current date as the End Date of each Affiliation, when declination is complete.

3 Click OK to begin the processing. As GIFTS processes the batch, the process log lists the results.

4 Check the log to verify that all of the Requests were processed fully, and note any discrepancies. You can click Print or Save As to keep the log for your records.

5 Click Close to exit the process log.

Approving a Batch of Requests

The Batch Approval process is similar to a single Request, except that GIFTS provides the values in many of the fields in the Approval form based on the data you have already entered for the Pending Request. If the system's calculations will provide the incorrect Approval information, make sure you exclude that Request from the Batch Approval.

Important: For each grant in the batch, GIFTS uses the Request's Recommended Amount as the Grant Amount. Because the Grant Amount is not easily changed after the Approval takes place, you should verify that Recommended Amounts are correct and exclude any Requests that should not be approved for the Recommended Amount.

To Approve a batch of Requests:

1 In the Requests folder, highlight all of the Requests you wish to Approve.

2 Choose Action ➤ Approve from the menu.The Approval Wizard guides you through the approval process.

You can enter or review the following information about the Approvals:

Field	Description
Date	All of the Requests approved in the batch will have the same Grant Date. This date defaults to the current date, but it can be modified if necessary. You can modify the Grant Date information for each grant manually after the Batch Approval.
Fiscal Year	The fiscal year to which you wish to assign the approved Requests. By default, it is the fiscal year in which the current date falls.
Award Amount	For each grant in the batch, GIFTS automatically supplies a Grant Amount equal to the pending Request's Recommended Amount.
Meeting Minutes	All of the Requests approved in the batch are assigned identical Meeting Minutes. Type the appropriate text here, if applicable.
Reference #	When you process a batch of Requests, this field is disabled. ❖ If GIFTS is not set up to generate these numbers automatically, you can manually enter them later for each Request in the batch. ❖ If GIFTS automatically assigns a Reference Number, only users in the Admin user group can change it.

When you are finished, click Next. The Wizard moves to the next page.

3 You can enter or review the following Project information for the Approvals.

Field	Description
Term	The term of the Request, as entered on Page 1 of the Request.
Starting	You can select either the Award Date or, using the available field, a different Start Date for all grants in the batch.
Ending	The Ending Date is calculated based on the Award Date and the Term of the grant.
New Status	The status of the Requests in the batch.

When you are finished, click Next. The Approval Wizard moves to the next page.

4 If you do not want to automatically schedule Payments, skip to the next step.

If you want to automatically schedule Payments for those Requests in the batch that do not already have scheduled Payments, mark the Automatically Schedule check box. You can then enter Payment information for the batch.

Note: If you have the optional Budget Module, you cannot automatically schedule Payments in open budget years because you cannot automatically resolve batches of Payments against the Budget.

Field	Description
Frequency	Determines the frequency of Payments for each grant: monthly, bi-monthly, quarterly, semi-annually, or annually.
Number of Payments	All of the grants approved in the batch are assigned the number of Payments that you supply here.
1st Payment Date	The date of the first or only Payment for each grant in the batch.

Field	Description
Payment Type	Select a Type from the list. If Payments in the batch are different Types, be sure to edit this information in the individual Payment records later. If your Administrator defined a default Payment Type, it is displayed here. If the default does not apply to the Payments you are creating, select another Type from the list.
G/L Account	If you use a general ledger accounting system, you can select the G/L account with which the Request's Payments are associated. If your Administrator defined a default G/L account, it is displayed here. If the default does not apply to the Payments you are creating, select another from the list.

Click Next.

5 If you want to track the value of Payments for this Request in another currency, select the currency options in the next Approval Wizard screen.

Note: This page of the Wizard will not appear during approval if you do not have the local/other currency feature set up in the Administrator. For information on the local/other currency feature, please see the "Setting Exchange Rates for Other Currencies" in the *Administrator's Guide*:

Field	Description
Amount	The recommended amount for each Request.
Local/Other Currency	The drop-down menu lists the active currencies listed in the Administrator's Exchange Rate Table. Select the currency you wish to see the Payment amounts for all Requests calculated in.
Exchange Rate	This field is for display only. After you have selected a Local/Other Currency, the exchange rate listed in the Exchange Rate Table is entered here.

Field	Description
Local/Other Amount	The resulting calculation of each Request's value in the other currency. It should be noted that this figure is not simply each Request's amount multiplied by the exchange rate. This figure may also be affected by the 'rounding factor' selected in the Administrator. Essentially, GIFTS performs the exchange rate calculation, *then* rounds the result to the nearest hundred, the nearest single unit—whatever rounding factor has been designated in the Exchange Rate Table.
When exchange rates change	You must decide what adjustment you want made (if any) to unpaid Payments when the currency's exchange rate changes: adjust Payment amount, adjust local/other amount, or adjust neither amount. Take care setting this option and be aware of its implications for the grant total. For a fuller explanation of these options, please see "About Currencies and Exchange Rates" on page 108 of the *Administrator's Guide*.

6 Click Finish. The Requests are marked Approved and automatic Payments are generated. A process log lists the results.

7 Check the log to verify that all of the Requests were processed fully, and note any discrepancies. You can click Print or Save As to keep the log for your records.

8 Click Close to exit the process log.

Changing the Status of a Batch of Requests

Since Status codes apply to specific Request Types, the Batch Status Change can be used only on Requests of the same Type. For each record in the

batch, the GIFTS creates an Activity record to document the change of Status.

To change the Status of a batch of Requests:

1 In the Requests folder, highlight all of the Requests you want to work with.

2 Choose Action ➤ Change Status from the Main menu.

You can enter the following information about the Status changes:

Field	Description
Date	The date of the Activity records posted to indicate that the Status changes took place. The Disposition Dates of the Requests are not changed.
New Status	The new Status of the Requests. Only those Status codes that apply to Disposition and Request Type of the Requests in the batch are available.
Notes	The notes for the Activity records to be posted regarding the Status Change.

3 Click OK to begin the processing. As GIFTS processes the batch, the process log lists the results.

4 Check the log to verify that all of the Requests were processed fully, and note any discrepancies. You can click Print or Save As to keep the log for your records.

5 Click Close to exit the process log.

Locking a Batch of Requests

When you lock a group of Requests, users can view but not edit the locked Requests as well as any Payments, Activities, or Requirements associated

with them. You can also choose to lock all Documents linked to the Request, or to leave the Documents unlocked.

To lock a batch of Requests:

1. In the Requests folder, highlight all of the Requests you wish to lock.
2. From the Main menu, choose Action ➤ Lock. You are prompted to confirm that you want to lock the Requests.
3. Click Yes to continue. You are prompted to choose whether you wish to lock all Documents associated with the Requests.
   - ❖ Click Yes to lock all Documents linked to the Request.
   - ❖ Click No if you want the Documents linked to the Request to remain unlocked. Note that you can lock individual Documents as described in "Locking and Unlocking Documents" on page 481.

   The process log lists the results.
4. Check the log to verify that all of the Requests were processed, and note any discrepancies. You can click Print or Save As to keep the log for your records.
5. Click Close to exit the process log.

Unlocking a Batch of Requests

To unlock a batch of Requests:

1. In the Requests folder, highlight all of the Requests you wish to unlock.
2. From the Main menu, choose Action ➤ Unlock. You are prompted to confirm that you want to unlock the Requests.
3. Click OK to continue. You are prompted to choose whether you wish to unlock all Documents associated with the Request.
   - ❖ Click Yes to unlock all documents linked to the Request.
   - ❖ Click No if you want the documents linked to the Request to remain locked. Note that you can unlock individual Documents in the

Document folder. For details, please refer to "Unlocking Documents" on page 482.

The process log lists the results.

4 Check the log to verify that all of the Requests were processed, and note any discrepancies. You can click Print or Save As to keep the log for your records.

5 Click Close to exit the process log.

Renewing a Batch of Grants

When you renew a batch of grants, a new Pending Request record based on the information from the original grant is created for each grant in the batch. As with all batch processes, the information you provide is applied to every Request in the batch.

To renew a batch of grants:

1 In the Requests folder, highlight all of the grants you wish to renew.

2 From the Main menu, choose Action ➤ Renew.

- You can choose for the new Requests to be of the same Request Type as their respective original grants, or you can choose a Request Type that is applied to every renewal in the batch.
- To specify a Request Status for the new Requests, choose the appropriate code in the Request Status field (only Status codes for the Request Type chosen are available).

- By default, the only Contact renewed is the Request Primary Contact identified on Page 1 of the Request. If you wish for the Contacts listed on the Affiliations tab of the Request to be carried over, enable the 'Carry over all non-primary contact affiliations' option.
- If the new Requests are also renewable, enable the option to 'Allow this request to be subsequently renewed'. (If this option is not set, and you subsequently wish to renew the Request, it can be set manually on Page 2 of the Requests later.) Then, specify the date at which the new Requests will be eligible for renewal. This date defaults to one year after the current date.
- The Renewal Activity fields determine the contents of the Activity records created by the Renewal process. These records are associated with the new Requests, and each record indicates the date on which the grant was renewed, the user responsible, and notes regarding the renewal. You can change the default information for the following options:

To change the staff member associated with the Activity, use the Staff field. This does not change the staff for the Requests, which defaults to the staff assigned to the original grants.

- To change the date reported in the Activity record, use the Date field.
- By default, the Activity notes indicate that the activity is a renewal, and specify the ID of the previous grant. Use the Notes field to add additional information to this note.
- Use the Custom Fields button to add Customizer fields.

3. Click OK to begin the processing. As GIFTS processes the batch, the process log lists the results.
4. Check the log to verify that all of the Requests were processed fully, and note any discrepancies. You can click Print or Save As to keep the log for your records.
5. Click Close to exit the process log.

Request Affiliations

To keep track of all the people who are associated with a Request, you can use Affiliations that link their Contact records to the Request. An Affiliation links a Contact's record to the Request and describes their role—such as Sponsor, Consultant, or Technical Advisor—in regard to that Request.

Important: General information about Request Affiliations follows. For detailed information about accessing, adding, modifying, and deleting Affiliations, please see "Working with Affiliations" on page 375.

You can create as many Affiliations between a Contact and a Request as are needed to describe his or her various roles.

In Request records, the Affiliations tab displays all primary and secondary Affiliations associated with the Request:

Click Edit Affiliation to open and edit the selected Affiliation record.

You can also click New Affiliation to add a secondary Affiliation, or Edit Contact to edit the Contact referred to in the selected Affiliation.

The columns in the Affiliations tab of a Request display the following data:

Column	Description
Contact	Lists the affiliated Contact's name, Affiliation Title, and Affiliation Address.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).

Column	Description
Notes	Any notes entered in the Affiliation record.
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Filtering Affiliation Records The following filtering options are available above the grid in the Request Affiliations tab:

Filter	Description
Role	Select from a list of Affiliation Roles to see only those Affiliations in which the affiliated Contact took that role.
Include Closed Affiliations	Select this check box to include closed Affiliations in the list. Clear the check box to see only active Affiliations.

Primary Request Affiliation

In addition to the Affiliations that you can create from the Affiliations tab, there is a Primary Affiliation used by GIFTS: Each Request can have a Primary Contact

As described in "Request Detail (Page 1)" on page 185, a Request's Primary Contact is identified on Page 1 of the Request, and is linked to the Request by a Request Primary Contact Affiliation identifying that person as the Request's Primary Contact.

Secondary Request Affiliations

You can also create any number of additional, secondary Affiliations between a Request and the Contacts working on it. For detailed information about Affiliations, please see "Working with Affiliations" on page 375.

Transferring a Request to Another Organization

In some cases, you may wish to change the Organization for a Request. Perhaps the project changed hands, or the Request was entered incorrectly.

When you transfer a Request to a different Organization, you are also given the option of updating its outstanding Activities, Requirements, and Payments with the new Organization information. Activities and Payments that have already been completed or marked as Done or Paid are not be affected by this process.

Note: GIFTS does not transfer Open Activities and unpaid Payments that are overdue (scheduled in the past). If you want to transfer overdue items, modify their dates before you transfer the Request or transfer them manually afterwards.

The new Organization to be assigned to the project must be entered into GIFTS before it can be used in a transfer.

To transfer a request to a different Organization:

1. Open the Request.
2. Click the Find button to the right of the Organization name. The Organization Search window is displayed.
3. Find the Organization to which you wish to transfer the Request and click OK. (If you cannot find the Organization in your database, click New to create a new Organization record. Fill in the New Organization form, then click Save and Close.) If the transfer is successful, the Organization name and address are updated on Page 1 of the Request.
4. When you have finished modifying the Request, click **Save and Close** to save your changes. If any outstanding Activities or Payments for the Request are found, GIFTS asks you whether you wish to transfer them to the new Organization.
5. If you click **Yes** to update the Payments and Activities, GIFTS:

- Transfers open Activities and unpaid Payments that are scheduled in the future to the new Organization
- Does *not* transfer Open Activities and unpaid Payments that are overdue (scheduled in the past).
- Does *not* transfer Done Activities and Paid Payments.

You can also click No to leave the Payments and Activities as they are, or Cancel to return to the Request without saving it.

Transferring Requests to Another Branch

If your organization uses branch security, you can transfer Requests (and their Payments and Activities) to other branches for future handling.

In order to transfer a Request or Requests, you must log in to GIFTS as a user with rights to modify records from the originating branch. This includes all users in the Admin group.

Transferring a Single Request

To transfer a single Request to another branch:

1. Open the Request.
2. From the Request menu, Choose **Action ➤ Transfer Branch**.

   For users of the optional Budget Module:

   - If any Payment(s) for this Request have been resolved against your Budget, a message opens informing you that you cannot transfer this Request to another branch without first deleting the resolved Payment(s). For more information on deleting Payments, please see "Deleting a Payment" on page 294. Click OK to close the message.
   - If this is a Pending Request, and any Payment(s) have been committed to the Budget, a message opens informing you that you cannot transfer a Request to another branch without first "uncommitting" the Payment(s). The message offers to uncommit the Payment automatically before performing the transfer. Click OK to have

GIFTS uncommit the Payment(s) and continue with the transfer. Click Cancel to cancel the transfer.

3 Select the branch to which you wish to transfer the Request.

4 Click OK to perform the transfer.

Transferring a Batch of Requests to Another Branch

1 In the Requests folder of the Organizer, display and highlight the Requests you wish to transfer.

2 From the main menu, select **Action ➤ Transfer Branch**.

3 Select the branch to which you wish to transfer the Requests.

4 Click **OK** to perform the transfer.

For users of the optional Budget Module, a message opens, informing you that Approved Requests with any resolved Payment(s) will not be transferred. You must delete the resolved Payment(s) first. For more information on deleting Payments, please see "Deleting a Payment" on page 294.

The message also notes that Pending Requests with any committed Payment(s) can not be transferred. It this case, the message offers to uncommit the Payment automatically before performing the transfer:

- Click **OK** to have GIFTS uncommit any committed Payment(s) and continue to transfer the associated Pending Requests.
- Click **Cancel** to prevent Requests with committed Payments from being transferred.

A process log opens, detailing the results of your batch transfer.

Transferring a Request to a New IGAM Owner

In some cases, you may wish to change the Owner for a Request. Perhaps the project changed hands, or the Request was entered incorrectly.

Note: This action is unavailable if the Request does not have an IGAM account associated or you do not have the Transfer Requests permission set in the Administrator's Module.

The new Owner to be assigned to the project must be entered into GIFTS before it can be used in a transfer.

To transfer a single Request to another Owner:

1. Open the Request.
2. From the Request menu, Choose **Action ➤ Transfer IGAM Account**.

The following Transfer IGAM Account form will be displayed.

The current IGAM Account owner will be displayed in the **Current Grantee** field. This is a read only field and cannot be edited.

3 Enter the new owner's Email Address and then again in the Confirm Email field. (The email addresses must match.) Ownership of the selected request transfers to the account of the e-mail address provided.

4 If the **Include all Related Requirements** checkbox is checked, all requirements associated to the request will also be transferred. If a requirement associated with the application has already been transferred to a 'New' owner, that requirement will be included in the transfer.

   The **Include all Related Requirements** checkbox does not appear if the Request does not have any associated Requirements.

5 If **Generate Correspondence** is checked, after clicking **OK** the Generate Correspondence Wizard will open where you can select from one of the available Request Approval templates.

   The primary contact for the organization will be the default recipient. The main purpose of this is to notify the primary contact of the organization that ownership is being transferred for one of the Requests/Requirements within their organization.

   If an email template is chosen, additional existing contacts/affiliations in GIFTS may be included.

Note: It is recommended that a 'Transfer' correspondence template be created in the Administrator's module for both the Request Approvals and

Requirements categories with the intention to be sent to an organization's primary contact or other contacts/affiliations notifying them of the transfer.

Deleting a Request

When you delete a Request, all of the records associated with it—such as its Payments and the Document records for its correspondence—are deleted as well. Once a Request is deleted, neither the Request nor its associated records can be recovered.

You cannot delete a Request that has Payments with a status of Paid or—if you are using the optional Budget Module—if the Request has any Payments resolved against the Budget. If you attempt to do so, GIFTS warns you that the Request cannot be deleted until all Paid and resolved Payments are deleted first.

To delete a Request:

1. Search for and open the Request you wish to delete.
2. From the Request menu, choose File ➤ Delete. You are prompted to confirm that you want to delete the Request.

Important: The delete function is only enabled on the Page 1 tab of open Requests.

Percentage Coding for GIFTS Requests

Percentage Coding allows the assignment of percentages to code values selected from code tables. The percentages are then used to calculate corresponding Request/Grant dollar amounts. These allocations can then be displayed in Views, Ad-Hoc reports, Charts, and the Request record where they are assigned. They may also be assigned in IGAM 5 and MyGIFTS.

Requirements for Percentage Coding

- If you are using a SQL or Oracle database, you must have GIFTS 6.4 or later. If included in your installation, you must also have IGAM 5 or later, GCS 3.6, and Plus Pack 5.1 or later.
- If you are using an Access database, you must have GIFTS 6.5 or later installed. If included in your installation, you must also have IGAM 5.5, GCS 3.6, and Plus Pack 5.2.1.

Important: Percentage Coding does not require IGAM, GCS, or Plus Pack to be installed to be enabled. However, if you have any of these modules installed, they must be the proper versions for compatibility. If any of the above modules is not compatible, the Percentage Coding functionality will be disabled in GIFTS.

Administrator Module Settings

To enable a Code Table for percentages, it must allow for more than 1 selection/level. This will enable a check box entitled Track amount percentages.

Note: Only existing code tables assigned to the Request coding sheet can be enabled for percentages.

In the Administrator module, go to **Setup > Code Tables**.

In the Code Tables window, highlight an existing table and click the Edit Table button.

Change the maximum number of selections to more than 1, check the Track amount percentages box and then click **OK**.

Caution: If a code table is enabled to track percentages, disabled, and then re-enabled, all previous values will be lost. All values will be set to zero.

Percentage Coding in Requests

If at least one code table is enabled for percentage coding, the Coding tab of a Request will display two additional columns. One column will be for Percentage and the other for Amount. Only enabled code tables will display values in these columns.

You can enter a value in either column and the system will automatically calculate the associated value when you tab or click out of the field.

Red subtotals represent categories that are over or under 100% allocation.

Percentage Coding Validation

The following validation rules apply when saving and closing the Request:

- The first code specified within a category will be set to 100% with the full request/grant amount.

- The second code selected will be assigned 0%. The fields will become editable from this point onwards.
- If only two codes are specified, changing one will automatically recalculate the other.
- If more than two are set, no automatic adjustments will be made.
- Percentages only support whole numbers.
- If a category's subtotal is not 100% of the Request / Grant amount, you will not be able to Save & Close.

Percentage Coding with Request Approval or Rollback to Pending

When a Request is approved or rolled back to Pending, and the Grant amount changes, the system will automatically adjust the amounts on the Coding tab.

Percentage Coding for Grant Amendments

Amending a Grant will prompt the user to amend the allocations by opening a form entitled Grant Amendment - Adjust Percentage Coding.

In order to proceed, percentages will have to be manually adjusted to account for the new Grant amount.

Percentage Coding for Organizer Charts

To include percentage coding values in your Summary Charts do the following:

1. Go to the Requests folder.
2. Modify the view as desired to show only the Requests you desire to chart.
3. Click the Show Summary button to open the Summary window.
4. Review the summary data on top to be sure you have the correct requests selected.

5. Click the Chart Type button and select a percentage coding enabled Code Table and level.
6. Data Value must be set to Request Amount or Grant Amount.
7. Check the box for Include Secondary Codes/Percentages.

8 Click Chart to preview your new chart and make modifications if desired.

For more details on Summary Charting features, please refer to "Charting Summary Information" on page 70.

Percentage Coding for Request Views

Percentage Coding can be displayed in custom Request Views by doing the following: .

1. In the Requests folder of GIFTS Organizer, go to View > Show Columns to open the Columns window.
2. For *Select available columns from*, select Coding Sheet.
3. Add the percentage coding enabled code table to your columns view list.
4. It is recommended to set the column display to Primary and Secondary if you have multiple percentage codes for each request.
5. Check the box for Display percentages.
6. Click Save and Close to see your new View.

Below is a sample of how Percentage Codes are displayed with Primary and Secondary codes set.

Percentage Codes for Ad-Hoc Reports

All of the options available in Views will also be available for Ad-Hoc reports when you go to **File > Print > Column** tab.

Sorting/Grouping When adding a percentage code enabled code table as a Group column, there will be the option to break Requests into different group sections according to the codes assigned. This essentially displays the Request multiple times with partial amounts based on percentage.

Once the percentage code enabled table is added as a column, the Request Amount and/or Grant Amount columns will have a Display partial amount option.

In the example below, the American Foundation for Children is listed twice. Once for Northeast at 50% and then again for Southeast at 50%.

!CP test

Organization's Name begins with '%'

15 February 2011

Disposition	Type/Status	Organization	Project Title	Geographical Area Served	Request Amount
Northeast					
Pending 6/20/2011 (LAUREN)	Cash Grants Considered for Board	American Foundation for Children Martin Doyle Tel: (212) 555-4366 doylem@afc.org	Someone to Run With	Northeast (50%)	$40,000.00
Total Northeast (1 item)					$40,000.00
Northwest					
Pending 6/18/2011 (BEN)	Cash Grants Staff Review	Ryan School of Medicine Jack K. Ryan Tel: (203) 771-2849 Fax: (203) 771-2889 ryanj@ryanschool.org	Renovation of medical training facitlity	West (40%)	$6,000.00
Total Northwest (1 item)					$6,000.00
Southeast					
Pending 6/20/2011 (LAUREN)	Cash Grants Considered for Board	American Foundation for Children Martin Doyle Tel: (212) 555-4366 doylem@afc.org	Someone to Run With	Northeast (50%)	$16,000.00
Total Southeast (1 item)					$16,000.00

Percentage Coding In Correspondence

The Display Percentages option will be available when adding percentage code enabled tables to correspondence templates in the Administrator module.

When the correspondence is generated by a user, the percentage will appear following the description value in parenthesis.

February 8, 2011

Midwest\Michigan (90%)
Midwest\Ohio (10%)

Dear Joe:

We are pleased to advise you that a grant in the amount of $500.00 was approved at our Board of Directors meeting. These funds are designated for . A check for that amount is enclosed.

By endorsing and depositing this check, you warrant that there has been no change in your I.R.S. tax classification as an organization described in Internal Revenue Service Code sections 501(c)(3) and 509(a)(1), (2) or (3).

We extend our best wishes to you for continued success and look forward to hearing about your accomplishments during the year. It is a pleasure to be among your current supporters.

Sincerely,

Percentage Codes In MyGIFTS/ ReviewerCONNECT

When editing codes in MyGIFTS, the percentage and dollar amounts will be available for assignment to percentage coding enabled tables.

Once the amounts/percentages are corrected and equal 100%, the record will be saved.

Note: Unlike in GIFTS, the amounts do not automatically adjust in MyGIFTS if you only have two code values present.

The percentages will be displayed in the Request Coding Sheet page available both in MyGIFTS and on the View Grant Request page in ReviewerCONNECT.

There will be no option to configure the display of percentages in the page part.

If included in Views, the percentages will display as in GIFTS View if applied to search results in MyGIFTS.

Percentage Codes will not be editable in ReviewerCONNECT.

Correspondence generated in MyGIFTS will display percentages.

Reports generated in MyGIFTS will display partial amounts and percentages.

Percentage Codes In GIFTS Charts Plus

Charts Plus supports percentage codes with an option labeled *Include Secondary Codes/Percentages* on the first tab of the Chart Plus form.

This option is only enabled when grouping by a coding table that has been set to track percentage amounts and the Request/Grant Amount fields are included as data values.

If this flag is checked, the resulting charts may include each Request multiple times based on the associated codes and represent the appropriate partial amount of the Request/Grant in each area.

This will then take into consideration the distribution of code values across Requests with groups displaying based on the actual percentage allocation.

Percentage Codes In GIFTS Batch Plus

The following rules to functionality have been added to GIFTS Batch Plus to support percentage codes.

Add Code When a code is added, the following rules apply:

- If a code is added as a secondary code, it will be set at 0%.
- If a code is added as a primary code, the following will apply:
  - If there are no existing codes, it will default to 100% with full Request/Grant amount.
  - If a primary code already exists at 100%, the new primary code will be set to 100% with full Request/Grant amount. The old primary code will be set to 0%.
  - If the request has an existing code at less than 100%, the new primary code will be added at 0% and the user will need to adjust the value manually.

Remove a Code When a code is removed, the following rules will apply:

- If the code is secondary, its allocation will be added to the primary code.
- If the code is primary, its allocation will be added to whichever code becomes the primary.

Make a Code Primary When a secondary code is made primary, the following rules apply:

- If the existing primary code is allocated at 100%, the new code will be set to 100% and the old one wil be set to 0%.
- If the existing primary code is not set at 100%, only the primary flag will change and the percentages will remain the same.

Replacing a Code When a code is replaced, the allocation amount of the new code will be the same as the one it replaced.

10 Working with Payments

This chapter describes how to create and manage the Payment Schedules for your Requests.

In This Chapter

About Payments **252**
Accessing Payments **255**
Creating and Modifying Payments **262**
Canceling a Payment **270**
Paying a Payment **271**
Using Payment Holds **275**
Voiding a Payment **276**
Reissuing a Payment **277**
Consolidating and Splitting Payments **278**
Using Payment Alerts **279**
Entering Refunds **282**
Contingent Payments **285**
Deleting a Payment **286**

About Payments

After you Approve a Request for funding, it is important to plan how and when the grant payments are made. Do you want to:

- Pay the grant with a single payment?
- Schedule a series of payments with periodic reviews to ensure that the project is meeting its goals?

In either case you will want a record of the payment that includes the payee organization, the amount paid, the date it was paid, and other information about the payment.

The Request's Payment Schedule can help you to manage individual payments and track their progress through your workflow. You can generate the Payment Schedule automatically when you approve the grant, as described in "Approving a Request" on page 229. You can also manually create a Payment record for each scheduled payment, either before or after you approve the Request.

When you create a Payment, it has a status of Scheduled—meaning that it is waiting to be paid. When you pay it, you change the Payment Status to Paid and record the Paid Date, check number, and other accounting information.

About Payments and Your Budget

Are you interested in forecasting your funding obligations up to the end of the fiscal year? If so, you can create a "preview" of your spending by scheduling Payments for Requests that are not yet Approved. If you are using the optional Budget Module, you can commit Payments to a Budget item before the Request is Approved. For more information, see the *Budget Module User's Guide*.

How to Schedule Payments

You can schedule Payments for a Request automatically when it is Approved, or add them manually any time. You may wish to add Payments manually because:

- You want to create a Payment Schedule for a Request that has not yet been approved in order to forecast your year-end budget
- The automatically-created schedule does not accurately reflect the Payment information for the Request.
- You wish to award a grant with multiple Payments in unequal time intervals that cannot be scheduled automatically.
- You did not automatically create the Payment Schedule when you Approved the Request.
- You need to split a Payment into several Payments.

You can edit the Schedule Date and the Payment Amount for a Scheduled Payment, as well as a variety of other information. Please be aware that once a Payment has been marked as Paid, you are restricted from modifying certain information.

If a grantee returns granted funds to you—perhaps because they underestimated their fund raising abilities—you can create Refund Payments to record the amount returned. Refunds are discussed in "Entering Refunds" on page 282.

You can also reissue Payments that have been voided or canceled. For details, please see "Reissuing a Payment" on page 277.

About Payment Restrictions

You can track the progress and spending of a funded project by making Payments contingent upon the grantee fulfilling a Requirement—such as providing a quarterly progress report. Contingent Payments cannot be paid until the Requirement is met. For more information, see "Contingent Payments" on page 285.

If you are working with a Scheduled Payment and want to ensure that is not inadvertently marked as Paid before you are through, you can put it on Hold. When the Payment is ready to be paid, you can remove the hold. For details, see "Using Payment Holds" on page 275.

About Inactive or Lost Payments

If you Schedule a Payment and then find that it will not be paid—say the grantee organization cancels the project, or you decide to change the Payment Schedule—you can cancel the Payment. To re-schedule a Payment, you can reissue it in GIFTS. For information on canceling and reissuing Payments, see "Canceling a Payment" on page 270.

Occasionally, you might mark a Payment as Paid and subsequently find that it won't be paid. This might happen when a check is lost, or the grantee cancels the project soon after applying for the grant. In either case, you can void the Payment. If you send a check to replace the lost one, you can reissue the Payment. For more information, see "Voiding a Payment" on page 276.

Voided and Canceled Payments, like Scheduled and Paid Payments, remain available for your reporting and budget calculations.

About Payment Imports and Exports

If your organization uses an accounting system (such as Quicken™) to make payments, you can save data entry time by exporting scheduled Payments directly to the accounting system. Once they are paid you can import the payment's accounting information—including check or wire transfer information, invoice number, and general ledger account number—back into GIFTS.

Example: At the beginning of the first quarter, export the payments for that quarter to your accounting system. Once the payments are made and invoices generated, you can import the quarterly payment information to GIFTS.

Payment exports and imports are handled by the GIFTS Accounts Payable (A/P) Module. Many of the functions in this chapter, such as the Payments Quick Find and the ability to work with Payments, are also available in the A/P Module. For more information, please see the *A/P Module User's Guide*.

About the GIFTS Check Writer

If you have the GIFTS Check Writer, you can print checks directly from GIFTS. The check information is automatically inserted into the Payment record when a check is cut. For more information, please see the *A/P Module User's Guide*.

About Payment Statuses

You can use the following statuses to manage your payments.

Payment Status	Description
Scheduled	The payment has not yet been paid.
Paid	The payment has been paid by means of a check or wire transfer.
Contingent	The payment is contingent upon a Requirement and should not be Paid until the contingency is met.
Void	The payment was paid and then voided.
Hold	The payment is on hold and cannot be paid until the hold is removed.
Refund	The payment record represents money returned by the grantee Organization.
Canceled	The Payment was scheduled (but not paid) and then canceled.

Accessing Payments

The following sections describe how you can access Payments in order to view and modify them.

The Request Payment Schedule **256**
The Payments Folder..... **257**
The Calendar **259**
Searching for Payments **260**

The Request Payment Schedule

To access the Payment Schedule for a Request, first open the Request through the Organizer. Then, go to the Payments tab and click Payment Summary. The Payment Schedule is displayed.

If you have the optional Budget Module, Budget information for the Payment is displayed here.

Payments are listed in date order, and the following information is displayed for each Payment.

Column	Description
Status/Date	The current Status of the Payment and the schedule and paid date.
Amount	The Payment Amount.
Payee/Reference	The payee Organization and the system-assigned Request ID for the grant. Note that the payee Organization does not have to be the same as the grantee Organization. If the Payment was Paid by check, the Check Number is displayed.
Notes	Any notes recorded for the Payment.

In addition, the information on the right summarizes the payment history of the Request.

Field	Description
Awarded	The total amount awarded for the grant.
Paid	The amount paid, to date, on the grant.
Balance	The unpaid amount of the grant.
Scheduled	The total amount of scheduled Payments for the grant.
Unscheduled	Any difference between the amount awarded and the amount scheduled is reflected here. Deleting Payments may result in an unscheduled balance.
Last Payment	The Payment Number of the last Payment paid. For instance, if three payments have been scheduled, and the first two paid, this field will display "2 of 3."
Date	The date on which the last Payment was paid.
Amount	The amount of the last Payment paid.
Check No.	The check number cut to pay the last Payment paid.
Next Payment	The Payment Number of the next Scheduled Payment. Note that the total number of Payments here does not include Refunds, Voided Payments, or Cancelled Payments—it is the total number of Payments that are actually being made.
Date	The date on which the next Payment is due.
Amount	The amount of the next Payment to be paid.

The Payments Folder

You can search for Payments in the Payments folder, or populate the Payments folder with the Payments associated with a particular record—such as a Request record or Organization record—by zooming in on that record and then going to the Payments folder.

Following is a view of the Payments folder after it has been populated by zooming in on an Organization known as the American Foundation for Children.

In the Organizer, you can see not only the Payments for a single Request, but other groups of Payments. For instance, you might want to display all of the Payments scheduled in the current quarter.

By default, Payments are sorted by their date, descending from the most future or recent Payment. Payments with the same date are sorted alphabetically (by the name of the grantee Organization).

You can customize the format, sort order, and content of the information in the Organizer, as described in "Working with the Organizer" on page 37. By default, the following information is displayed in the Payments folder.

Column	Description
Locked Status	A padlock is displayed if the Payment's Request has been locked. If the lock is green, you can edit the Payment. If it is red, you cannot.
Status/Date	The current Status of the Payment and the date on which it is scheduled to be Paid. If the Payment has been Paid, the date of payment is displayed.

Column	Description
Amount	The Payment Amount. If your system is set up to track in-kind Payment information, the Fair Market Value is displayed here.
Payee/Reference	The payee Organization and the system-assigned Request ID for the grant. If the Payment was Paid by check, the Check Number is displayed.
Fund/Notes	The Fund entered for the Payment, and any notes recorded in the Notes field of the Payment.
ID	The unique, system-defined ID for the Payment.
Audit	The dates on which the record was created and last modified, and the Login IDs of the users that created and last modified the record.

Payments are color-coded to indicate their Status: Scheduled, Paid, Contingent, Refund, Voided, Canceled, or on Hold.

The Calendar

Payments can also be viewed and modified from the Payments view of the Calendar.

For information about using the Calendar view, see "Working with the Calendar" on page 435.

Searching for Payments

You can search the Payments folder using any of the search techniques described in "Searching for Data in GIFTS" on page 77. This section details the Quick Find search properties for Payments.

You can search for Payments using any combination of the following properties.

Property	Description
Amount	The amount of the Payment.
Bank Code	The code for the bank to which the Payment is made. (For wire transfers only.)
Bank Name	The name of the bank to which the Payment is made. (For wire transfers only.)
Branch	If Branch Security is enabled, this option will let you search by branch/division.
Budget Year/ Category	If you have the Budget module installed, this option will allow you to search for Payments by Budget year and Category.
Check Number	The number of the check cut by your accounting department or the GIFTS Check Writer. (For checks only.)
Fiscal Year	The Fiscal Year during which the Payment is scheduled or was paid.

Property	Description
Fund/Donor	The Fund Donor code assigned to the Payment.
G/L Account	The General Ledger Account code assigned to the Payment.
Grantee Organization's Name	The name of the Organization to which the grant was made. (The grantee and the payee are not always the same.)
Paid Date	The date on which the Payment was paid.
Payee Organization's Name	The name of the Organization to which the Payment was made. (The grantee and the payee are not always the same.)
Payment City, State, and Country	You can search by the City, State, and/or Country of the address to which the Payment was sent.
Payment ID	The system-assigned Payment ID number.
Payment is Not Exported	Searches for Payments that have not been exported or, if you have the GIFTS Check Writer, printed.
Request Coding Sheet	Search by the Request Coding Sheets. When you click this property, the Coding Sheet for Requests is displayed.
Request Disposition	The Disposition of the Request for which the Payments are scheduled (Pending, Approved, or Declined).
Request ID	Search for the specific ID number of the Request.
Request Reference No.	Search by the Request Reference number.
Request Type and Status	Search by Request type - such as 'Cash Grants' - and by Status.
Resolved?	If you are using the optional Budget Module, has the Payment been resolved against your Budget?
Schedule Date	The date on which the Payment is scheduled to be paid.
Status	The Status of the Payment (Scheduled, Paid, Contingent, Void, Hold, Refund, or Canceled).
Support Type	The Support Type code assigned to the Payment.
Type	The Payment Type code assigned to the Payment.

Property	Description
Wire Transfer	Searches for Payments that are or are not wire transfers.

Creating and Modifying Payments

The following sections describe how to create new Payments, open existing Payments, and edit the Payment records.

Adding a New Payment **262**
Opening an Existing Payment **263**
Editing Payment Information **263**
Entering or Modifying Amounts in Other Currencies **266**
Entering or Modifying Wire Transfer Information **266**
Entering Quid Pro Quo Information **268**
Entering In-kind Grant Information **269**
Entering Payment Requirements **269**
Changing the Payee Information **270**
Saving a Payment **270**

Adding a New Payment

To create a new Payment, do either of the following:

- In the Organizer, zoom on the Request for which you want to create a Payment. Then, go to the Payments folder and click the New button on the Folder toolbar.
- In the Organizer, open the Request for which you want to create a Payment. Then, go to the Payment Summary on the Payments tab and click New.

If any of the Request's Payments have been Paid, GIFTS asks if you wish to add a Scheduled Payment or a Refund. Click the option to create a Scheduled Payment.

Opening an Existing Payment

To open an existing Payment, do either of the following:

- In the Organizer, locate the payment in the Payments folder. Then, choose File ➤ Open from the Main menu.
- In the Organizer, open the Request's record. Then, go to the Payment Summary section on the Payments tab, highlight the Payment, and click Edit.

Editing Payment Information

After you create or open a Payment record, you can edit the information within it:

The following fields are displayed on the Payment.

Field	Description
Payee	Defaults to the Organization receiving the grant, but you can click the Find button to select a different payee Organization. If the Payee that you select and/or the Grantee are not subsidiaries of other Organizations, GIFTS asks if you want to link them. For details on parent and subsidiary Organizations, please see “Organization Subsidiaries” on page 197.
Subdivision	A sub-section within the payee Organization. For example, the division that manages Education funding.
Contact	The payee Contact. You can choose any of the Contacts affiliated with the payee Organization.
Address	The address to which the Payment is to be sent: the Payee Organization Address, the Contact’s Primary Mailing Address, or the Contact’s Office Address.
Amount	The amount of the Payment. If your system is configured to track in-kind grants, enter the Full Market Value of the grant here. This information is required.
Date Scheduled	The date on which the Payment is scheduled to be paid. This information is required.
Payment No.	The number of this Payment in the sequence of Payments. If there is only one Payment scheduled, the Payment number is one. Otherwise, GIFTS displays the Payment number and the total number of scheduled payments, such as “1 of 1” or “2 of 3.” Note that the total number of Payments here does not include Refunds, Voided Payments, or Cancelled Payments—it is the total number of Payments that are actually being made.

Field	Description
Fiscal Year	When the Payment is created, GIFTS populates this field with the fiscal year in which the Schedule Date falls. If your permission set allows you to update the Fiscal Year field in Payments, you can change the fiscal year. (Please note, however, that this may affect your financial reporting.) Otherwise, the field is read-only. Note: The Fiscal Year value may be updated automatically when and if the Schedule Date or Date Paid (for paid Payments) is changed. Contact your GIFTS administrator to find out how your system is set up to handle such changes.
Fund	The fund for the Payment. This defaults to the fund entered for the Request. If the Request has Payments that come from separate funds, you can specify the fund for each individual Payment. Note: Changes to the Payment's Request record will automatically update this field, if necessary.
Support Type	The support type for this Payment. If the Request has more than one Payment for different projects, you can specify the support type of each individual Payment. Note: Changes to the Payment's Request record will automatically update this field, if necessary.
Payment Type	Select a Type from the list. If your Administrator defined a default Payment Type, it is displayed here. If the default does not apply to the Payment you are working with, select another Type from the list.
G/L Account	Many grant makers have a general ledger accounting system with codes for specific types of Payments. If you have such a system in place, you can select a G/L Account from the list. If your Administrator defined a default G/L account, it is displayed here. If the default does not apply to the Payment you are working with, select another account from the list.
Date Paid	This field displays the Payment date if the Payment has already been Paid. There is no access to this field if the Payment has not been marked as Paid.

Field	Description
Check No.	This field displays the check number if the Payment has already been Paid and a check number has been entered. There is no access to this field if the Payment has not been marked as Paid or if the Payment was made by wire transfer.
Date Cleared	The date the check or wire transfer cleared. There is no access to this field if the Payment has not been marked as Paid.
Wire Transfer	This option indicates that the Payment is to be paid by wire transfer. If you specified default wire transfer information for the Organization or Request with which the Payment is associated, it is copied to the Payment when you select this option. Note that your administrator can set GIFTS to automatically flag Payments as wire transfers when they are greater than a specified amount, or are paid to Payees that are in certain countries.
AP Invoice	The invoice number used by your external A/P system for this Payment. Note that this is not entered automatically by the optional GIFTS A/P links.
Notes	Any notes pertaining to the Payment.

Entering or Modifying Amounts in Other Currencies

You can calculate the Payment amount in another currency in the Local/Other Currency tab.

Initially calculating a Payment amount in another currency is fairly straightforward. Modifying amounts in other currencies can be more complicated, as it can affect Payment (and thus total grant) amounts.

In order to cover all aspects of the Local/Other Currency tab, its use is explained in a larger section following this one. Please see "Multi-Currency in Requests and Payments" on page 297.

Entering or Modifying Wire Transfer Information

If the Payment is made by wire transfer, you can use the fields in the Wire Transfer tab to record wire transfer information for the Payment. You can

add or modify this information before or after the Payment is marked as Paid.

The Intermediary tab(s) will appear if you click Add Intermediary in the lower right corner of the Wire Transfer tab. You can enter data in the fields shown for each intermediary you add.

Note: You can only view this tab and make edits to this information if you have the appropriate permissions.

If you specified default wire transfer information for the Organization or Request with which the Payment is associated, the default wire transfer information is added automatically when you flag the Payment as a wire transfer. You may also choose to update the Payment record with the default wire transfer information from the Organization or Request record. For details, please see "Default Wire Transfer Information" on page 189 and "Payments: Wire" on page 223.

Note: Your Administrator can set preferences that automatically add default wire transfer information when you generate a Payment that is greater than a specified amount, or when the payee is in a specified country.

When you have completed entering or editing the wire transfer information, you can go to another tab or click Save and Close to save the Payment.

Entering Quid Pro Quo Information

Many grant makers make donations for which they receive a service or product with monetary value. For instance, the dinner served at a fund raising event is a product received.

If your Administrator configured your system to track quid pro quo and/or in-kind grant information, you can use the fields on the Quid Pro Quo / In Kind tab to track this value separately from the part of the donation considered a charitable contribution.

The GIFTS Report Library includes reports that use quid pro quo and in-kind information to calculate the tax-deductible portion of your Payments.

Field	Description
Payment Amt	The total amount of the donation. This amount is taken from the Amount field of the Payment tab, and cannot be edited.
Quid Pro Quo Value Rcv'd	The value of the product or service received.
Deductible	This amount is generated by GIFTS, and indicates the difference between the Payment amount and the Quid Pro Quo value received.

Field	Description
Description	A description of the product or service received.

Entering In-kind Grant Information

Many grant makers donate products—such as computers—to charitable organizations. The in-kind tracking fields allow you to track the information needed to report this giving to the Internal Revenue Service (IRS).

Field	Description
Full Market	The publicly-reported value of the donation. This amount is taken from the Amount field of the Payment tab, and cannot be edited.
Tax Value	The value of the contribution, according to the IRS.
Book Value	The list price of the product, as purchased.
Description	A description of the donation.

Entering Payment Requirements

If you want to monitor the progress of a project that you are funding, you can schedule Requirements for the Payment and make payment of the grant contingent on the Requirement's completion.

For example, you might require that the grantee submit a progress report before the grant is paid. If a grant has multiple payments scheduled, you might pay the first payment, but require a progress report before further payments are issued to the payee.

For details on Requirements and Contingent Payments, please see "Adding and Modifying Payment Requirements" on page 337 and "Contingent Payments" on page 285.

Changing the Payee Information

If the grantee receives their payments through a "fiscal sponsor", you can update the payee information in the Payment record to reflect the intended recipient of the payment. To do so, simply click the Find button displayed next to the payee on the Payment record. You are prompted to choose a new payee Organization.

Saving a Payment

When you are finished entering the Payment information, you can click Save and Close to save your changes or choose File ➤ Close to discard your changes.

- If your Administrator has configured the system to require receipts for Payments from the Payment's fund for over $250, GIFTS creates a Payment Requirement ("Receipt Required"). For information about configuring this option, please refer to the *Administrator's Guide*.
- If by adding this Payment you have scheduled Payments totalling more than the amount awarded for the grant, you are prompted to confirm that you want to amend the Grant Amount.

Click Yes if you wish to amend the grant, and then follow the instructions in "Amending a Grant" on page 240. If you do not wish to amend the grant, click No to cancel the creation of or changes to the Payment.

Canceling a Payment

If you schedule a Payment and later discover that it will not be paid, you can cancel it. Canceled payments remain available for Budget calculations and reporting, but are not included in reports that list Payments Due.

Example: You schedule a Payment in the first quarter of the year and then the grantee asks that payment be delayed. You can maintain the integrity of your quarterly financial records by canceling the Payment rather than deleting it. If the grantee wants to receive the Payment later, you can reissue it. For details, please see "Reissuing a Payment" on page 277.

If you are using GIFTS with the optional Budget Module, please see the *Budget Module Users Guide* to learn how canceled Payments can affect your Budget.

To cancel a Payment:

1. Open the Payment.
2. From the Payment menu, choose Action ➤ Cancel. You are asked to confirm that you want to cancel the Payment.
3. Click Yes. You are asked if you want to reissue the canceled Payment.
4. Click Yes to cancel the Payment and reissue it, or No to cancel the Payment and not reissue it; you can reissue it later.
5. Click Save and Close to save the canceled Payment, or choose File ➤ Cancel from the Payment menu to exit the Payment without canceling it.

Paying a Payment

When a grant payment is made, you can change the Status of its Payment record to Paid so that it can reflect the Payment information and be removed from reports and queries for open items.

You can pay any Scheduled Payment. You cannot, however, pay Payments with a Status of Contingent, Canceled, Void, or Hold. To pay a Contingent or on Hold Payment, you first need to mark the contingency as done or remove the hold. If you want to pay a Payment that has been voided or canceled, you must reissue it. For details, please see "Reissuing a Payment" on page 277.

Note: If you use the Budget Module, you must resolve the Payment against your Budget before it can be paid. If the Fiscal Year is *not* represented in your Budget—as might be the case with historical Payments you are entering so

that you can track them in GIFTS—you are not required to resolve the Payment before marking it Paid.

Important: Once the Payment is Paid, the Payment Amount and Payment Schedule Date are locked and cannot be modified. Make sure the information in these fields is accurate before you pay the Payment.

Paying a Payment from the Organizer or the Calendar

You can mark a Payment as Paid from the Payment folder of the Organizer or from the Calendar without having to open its Payment record.

Note: If you want to enter or edit wire transfer information for the Payment, you must open the Payment record as described in the following section, "Paying a Payment From its Payment Record".

To pay the Payment:

1 Select the Mark as Paid action:

- In the Payments folder of the Organizer, highlight the Payment and choose Action ➤ Mark as Paid from the Main menu.

- In the Payments Calendar, click on the day on which the Payment is scheduled. Go to the Daily view, highlight the Payment, and choose Action ➤ Mark as Paid from the Main menu.

You are prompted to enter the Payment information.

Field	Description
Date Paid	The Payment Date for the Payment.

Field	Description
Check No.	The Check Number of the Payment, if applicable.
Notes	Any notes relevant to the Payment. If the Payment already has notes associated with it, they are displayed.

2 Enter the Payment information and click OK to pay the Payment.

Paying a Payment From its Payment Record

If you are working with a large number of Payments, it is easy to confuse them. To be sure that you are paying the correct Payment, you can view the complete Payment record as you pay it.

To mark a Payment as Paid from its Payment record:

1 Open the Payment.

2 Choose Action ➤ Pay from the Payment menu. The Payment information section is enabled.

Field	Description
Date Paid	The date on which the Payment was paid. This date is required.
Wire Transfer	Click this check box if the Payment is to be made by wire transfer.
Check No.	The check number of the Payment. This is optional.
Date Cleared	The date the check or wire transfer cleared.
AP Invoice	The invoice number used by your accounting department to record the transaction. This is a text field, and is not automatically filled by any of the optional GIFTS A/P links.

Click Save and Close to save the Payment or, to enter or modify wire transfer information, go to the Wire Transfer tab.

Paying a Batch of Payments

Many grant makers process their checks on a monthly or other periodic basis. With GIFTS, you can mark batches of Payments as Paid rather than having to update each Payment individually. Each Payment in the batch is marked as Paid and given an identical Payment Date.

Note: You cannot supply check numbers or flag the payment as a wire transfer for batches of Payments. To enter this information, process each Payment individually.

For information about marking Payments as Paid when you print checks with the GIFTS Check Writer or share data with an external accounting system, please refer to the *A/P Module User's Guide*.

To select a group of Payments for batch processing, use a search or zoom to display them in the Organizer grid and highlight the Payments that you wish to process. It's all right if Payments you do not wish to include in the batch are displayed—you can easily exclude these Payments.

To mark a batch of Payments as Paid:

1. In the Payments folder of the Organizer, highlight all of the Payments you wish to mark as Paid. To highlight more than one Payment, press CTRL or SHIFT as you click on the Payments, or press CTRL+A to select all of the Payments.

   Important: Be sure that you highlight only Scheduled Payments for your batch. If you include Payments with any other Status, you won't be able to continue.

2 From the Main menu, choose Action ➤ Mark as Paid (If this selection is disabled, check your batch to be sure it contains only Scheduled Payments.).

Field	Description
Date Paid	The date of the Payment. This date is applied to every Payment in the batch.
Notes	Any notes relevant to the Payment. These notes appended to the existing notes for each Payment in the batch.

3 Click OK to begin the processing. As the system processes the batch, GIFTS displays a log of the results.

4 Check the log to verify that all of the Payments were processed, and note any discrepancies. To keep the log for your records, click Print or Save As.

5 Click Close to exit the log.

Using Payment Holds

In some cases, it is necessary to put a Payment on hold. When you put a Payment on hold, it cannot be Paid until the hold is removed by a user who has permission to do so.

Example: You know the Payment should be made, but you want to confirm the payee's address or wire transfer information before you pay the grant.

To put a hold on a Payment:

1 Open the Payment:

2 From the Payment menu, choose Action ➤ Hold. The Status of the Payment is changed to Hold.

To remove the hold:

1 Choose Action ➤ Activate from the Payment menu. The Payment's Status is changed back to Scheduled.

Voiding a Payment

Payments that have already been marked as Paid can be voided. You might want to void a Payment that is inadvertently marked as Paid, or when a payment check is lost. Once you void a Payment, you can reissue it or amend the total Grant Amount.

When you void a Payment, GIFTS generates a separate Payment record with a status of Void and a negative Payment Amount equal to the original Paid Amount. (The Payment's Fiscal Year is determined by the Voided Date, not by the original Payment's Fiscal Year. Your permission set may allow you to change Fiscal Year in Payments, but be aware this may affect your financial reporting.) Both Payments remain in your records for budget calculations and reporting.

Note: If you are working with the optional Budget Module, the voided funds are returned to your Budget, as described in the *Budget Module User's Guide*.

If your Administrator has granted you the needed permissions, you can delete Payments that you've voided in order to correct data entry errors. If you want to delete a Payment that has been voided and reissued, you must first delete the reissued Payment.

To void a Payment:

1 Open the Payment.

2 From the Payment menu, choose Action ➤ Void. You are asked to confirm that you want to void the Payment.

3 Click Yes. You are asked if you want to reissue the voided Payment.

❖ Click No to void the Payment and not reissue it; you can reissue it later.

An automatically-generated note indicates that the Payment was voided and includes the original Payment Amount.

❖ Click Yes to void the Payment and reissue it. A new Payment record is opened for the reissue Payment.

4 Click Save and Close to save the voided Payment, or choose File ➤ Cancel from the Payment menu to exit the Payment without voiding it.

Reissuing a Payment

When you void or cancel a Payment, you have the option of immediately reissuing it. If choose not to reissue the Payment at the time you void or cancel it, you can do so later.

Note: You can only reissue a Payment once. If you attempt to reissue a Payment a second time, you are notified that you cannot reissue it again.

To reissue a voided or canceled Payment:

1 Open the Payment:

2 From the Payment menu, choose Action ➤ Reissue. You are asked if you want to reissue the Payment. Click Yes.

The Payment is reissued with a new Payment number. An automatically-generated note indicates that the Payment was reissued and includes the original Payment number, paid amount, and date paid.

3 Click Save and Close to save the reissued Payment, or choose File ➤ Cancel from the Payment menu to exit the Payment without reissuing it.

Consolidating and Splitting Payments

If you create multiple Payments for a grant and then your board decides to pay the grant all at once, you can consolidate the Payments into a single Payment. Conversely, if you automatically schedule a single Payment when you approve a Request—then decide that you would prefer to make several payments over the term of the grant—you can split the single Payment into multiple Payments.

In order to accurately track your spending, GIFTS does not allow you to schedule more money to be paid than you have approved for the grant. Therefore, when you consolidate multiple Payments into one, or split single a Payment into multiple Payments, you need to ensure that you don't exceed the total Grant Amount.

You can consolidate or split Payments, without exceeding the total grant amount, as follows:

- To consolidate two or more Payments into one, first cancel or delete the extra Payment(s). Then increase the amount of the remaining Payment to reflect the whole amount.
- To split one Payment into two, first decrease the amount of the existing payment or cancel the Payment and add a second one for a smaller amount. Then, add a new Payment.

Important: If you increase or decrease the Grant Amount when you consolidate or split Payments, the system prompts you to amend the Grant Amount. You cannot save the changes to your Payment until you amend the Grant Amount as described in "Amending a Grant" on page 240.

Using Payment Alerts

An alert is a way of marking and annotating a Payment so that you can remind yourself or your colleagues of something important regarding the Payment. Exactly how Payment Alerts are used is up to you.

You can choose whether you want the Alert Message to display when users open the Payment record. For example:

Note: Any alerts for related records will also display. For example, if there are any alerts for the Payment's Request and/or Organization, they will also display.

Posting an Alert

To post an alert:

1 Search for and open the Payment's record.

2 From the Payment menu, choose Action ➤ Alert.The Alert form displays.

Field	Description
Message	The Alert text. If this field is left blank, no Alert is posted.
Display Alert Message?	Enable this option to display the Alert message each time a user opens the Payment record. Otherwise, users can click the Alert button to view the message.

3 Click OK to save the Alert and return to the Payment record.

Removing an Alert Message

To remove an alert, open the Alert form, delete the message text, and click OK. Then, save the Payment. GIFTS cancels the Alert.

Uploading Payment Status to IGAM

A new Action Menu item is available in the Payments tab/folder of GIFTS for users with IGAM 5 or later.

The *Upload Payment Status to IGAM* function is limited to users who are members of the Admin group.

It will only be enabled under the following conditions:

- User is member of the Admin group
- A Payment or Payments have been selected

The Upload Payment Status to IGAM action will have the following functions:

- On first upload for a Payment, it will create the Payment row for display on the My account page
- On second or following upload, it will update the Status with the current Status in GIFTS (where possible) and remove deleted Payments if they have been deleted in GIFTS.
- The Payment Number, Payment Amount, Payment Status and Paid Date may change if the data changes in GIFTS.
- If the Hide Voided and Cancelled Payments preference in IGAM is selected, the following additional logic will occur:
  - If a Payment is selected for upload with a status of Void, the IGAM server ignores it and does not create a record.
  - If a Payment is selected for upload with a status of Cancelled, the IGAM server deletes any copy it might have of the Payment (it is no longer displayed).
  - If a Payment is selected for upload with a status of Paid and a non-zero Void_ID, the IGAM server deletes any copy it might have (original record is no longer displayed).

Update Selected Payments Only If chosen, this will affect only the highlighted Payments.

Update All Payments Since Last Upload If chosen, this will update all Payments that have been previously uploaded, as well as any eligible Payments (i.e. Payment that is associated with a Request that was created in IGAM and has an associated IGAM account). It will also delete Payments from My Account pages that were previously created and then deleted in GIFTS.

Entering Refunds

Refunds are payments that are returned or paid by the grantee; in GIFTS, they are entered as separate payments for a negative amount, so that the amount paid for the grant decreases by the refunded amount.

Example: You have a three-year grant with Payments of $100,000 each year. You make the third Payment, forward the check to the Organization, and the Organization cashes it. The project is canceled, however, and the Organization sends you a check in the amount of your third Payment. You now need to reflect in GIFTS that the Payment was Paid and then returned.

Creating a refunded Payment is similar to adding a new Payment to the Payment Schedule. Please note that the refund option is not available if no Payments have been Paid for the grant.

To enter a Refund:

1. Create a new Payment record for the refund:

   If one or more of the grant's Payments are already Paid, the system asks if the Payment you wish to add is a Scheduled Payment or a Refund.

Click on the option to create a Refund\Credit. A new Refund record is displayed.

2 Enter the Refund information in the available fields.

Field	Description
Payee	Defaults to the Organization that received the grant. If the refund came from another Organization, you can click the Find button next to the name to search for a different Organization.
Contact	The Refund Contact. You can choose any of the Contacts affiliated with the Payee Organization.
Amount	The amount of the refund. This information is required, and is always a negative amount.
Date Rcv'd	The date on which the refund was received. This information is required.

Field	Description
Fiscal Year	The Fiscal Year of the refund. The value in the field defaults to the fiscal year in which the Check Date falls. If your permission set allows you to update the Fiscal Year field in Payments, you can change the fiscal year. (Please note, however, that this may affect your financial reporting.) Otherwise, the field is read-only. NOTE: The Fiscal Year value may be updated automatically when and if the Check Date is changed. Contact your GIFTS administrator to find out how your system is set up to handle such a change.
Fund	The fund for the refund. This field default to the fund entered for the grant. If the refunds for a grant belong to separate funds, you can specify the fund to which the refund belongs.
Support Type	The support type for this refund.
Payment Type	Select a Type from the list. If your Administrator defined a default Payment Type, it is displayed here. If the default does not apply to this Refund, select another from the list.
G/L Account	Many grant makers have a general ledger accounting system with codes for specific types of Payments. If you have such a system in place, you can select a G/L Account Code from the list. If your Administrator defined a default G/L account, it is displayed here. If the default does not apply to this Refund, select another from the list.
Notes	Any notes pertaining to the refund.
Status	The status of the refund.
Payment No.	Automatically set to zero and cannot be edited.
Wire Transfer	If the refund is made by wire transfer, click this option and enter or modify the wire transfer information. For more information, please refer to “Entering or Modifying Wire Transfer Information” on page 266.
Date Paid	The date of the refund check.
Check No.	The check number of the refund. This field is not available if the Wire Transfer option is on.

3 When you have finished editing the refund, click Save and Close to save your changes and exit. Since creating a refund generally results in a

decrease in the total Grant Amount to be paid to the organization, you are prompted to confirm that you want to amend the grant.

4 To amend the grant, click Yes and follow the instructions in "Amending a Grant" on page 240. If you click No, the Grant Amount is not changed and the refund is saved.

Contingent Payments

Contingent Payments cannot be marked as paid until the grantee meets certain contingency requirements, such as with matching or challenge grants. To make a Payment contingent, add a Payment Requirement and mark it as Contingent.

Select this option to mark the Requirement as Contingent.

In GIFTS, Payments with a Status of Contingent cannot be marked as Paid until its contingency Requirements are marked as Done.

For more information on Payment Requirements, please refer to "Adding and Modifying Payment Requirements" on page 337.

Deleting a Payment

If a you no longer wish to maintain a record of a Payment, you can delete it. You might want to delete a Payment that was created inadvertently, or one that was consolidated with another Payment. Only users with proper permission can delete Payments that have already been paid or voided.

Note: If you want to delete a Payment that is a reissue of a voided Payment, you must delete the Void Payment record first.

Tip: If you are using GIFTS with the optional Check Writer Module, you will not be able to delete a Payment that has a "Paid" status in your check register. Before you can delete a Payment, it must be voided. For auditing purposes, your check register will continue to show the voided Payment even after you delete the Payment record.

If you are using GIFTS with the optional Budget Module, please refer to the *Budget Module User's Guide* to learn how deleted Payments can affect your Budget.

Caution: Deleted Payments cannot be recovered. If you want to retain a record of an inactive Payment, you can Void or Cancel it. For details, please see "Voiding a Payment" on page 276 or "Canceling a Payment" on page 270.

When you delete a Payment, GIFTS prompts you to amend the Grant Amount, since deleting a Payment reduces the total amount of the Payments scheduled for the grant. Depending on your reason for deleting the Payment, you can amend the grant or leave the total as is. For example:

- If you are consolidating Payments by deleting a Payment and then increasing the amount of another, then you would choose not to amend the grant.

- If the amount granted for the Request has been decreased, you should amend the grant in order to reflect that.

To delete a Payment:

1. Open the Payment you wish to delete.
2. From the Payment menu, choose File ➤ Delete. GIFTS prompts you to confirm that you want to delete the Payment.
3. Click Yes to delete the Payment. You are asked whether you want to amend the Grant Amount.
4. If you are amending the grant, click Yes and amend the grant as described in "Amending a Grant" on page 240. Otherwise, click No to continue. The Payment is deleted.

11 Multi-Currency in Requests and Payments

This chapter explains how to track Request and Payment amounts in another currency, using exchange rates stored in the GIFTS Administrator Module. These feature are not available in Essential GIFTS.

In This Chapter

About Currencies and Exchange Rates **290**

Local/Other Currencies in Requests **291**

Local/Other Currencies in Payments **297**

Adding or Modifying Currencies in Requests **300**

Working with Multi-Currency Requests **307**

Working with Multi-Currency Payments **314**

About Currencies and Exchange Rates

If you are involved in international grant-giving and want to track Request and Payment amounts in two currencies—your own, and another currency used by the grantee—you can do it using GIFTS multi-currency features.

The basic concept behind GIFTS multi-currency features is fairly simple: Your GIFTS administrator enters and saves other currencies (and their exchange rates) in the Administrator Module. Then, when adding or modifying a pending Request or unpaid Payment, you can specify a second currency (e.g., Euro, Japanese Yen). GIFTS then automatically calculates the amount of the Request or Payment in that one currency, based on the other currency and the exchange rate in the Administrator Module, and saves that amount in the Request or Payment record.

After that, however, it can get more complicated. You're well aware that exchange rates are not static: They fluctuate daily—even hourly!

So what happens when exchange rates change? Do you want two-currency Request and Payment amounts recalculated when exchange rates are updated? Which amount do you want to remain constant—the amount in your currency, or in the other currency?

These decisions can be made by your GIFTS administrator, who sets rules for your GIFTS system regarding multi-currency Payments and Requests. GIFTS's flexible multi-currency features allow your GIFTS administrator to enforce these rules strictly—or your GIFTS administrator may allow you to change multi-currency behavior for individual Requests and Payments.

Due to this flexibility, you may find that some of the features described in this chapter unavailable when you are working in GIFTS. This manual will describe each feature, and note which ones may or may not be available.

Key Terms: "Functional" versus "Local/Other"

The amount of a Request or Payment can be tracked in two currencies. GIFTS refers to these as the *functional currency*—the currency your organization headquarters uses—and the *local/other currency*—the currency the grantee uses.

Your functional currency is specified in the multi-currency preferences of the GIFTS Administrator Module. By default, GIFTS uses the currency selected in your Windows Regional Settings. However, your GIFTS administrator can enter a different currency to use as your functional currency. Check with your GIFTS administrator if you are unsure what your functional currency is.

A local/other currency is usually selected within pending Requests or unpaid Payments by GIFTS users. In some cases, when most or all of your organization's giving is in another currency, GIFTS may be set up to add the local/other currency automatically to each new Request or Payment.

Just as we refer to functional and local/other currencies, we also refer to functional and local/other *amounts*.

The functional amount is the "real" amount of the Request or Payment—the amount that you are granting out of your giving budget. When you then specify a local/other currency to a Request or Payment, GIFTS multiplies the functional amount times the exchange rate specified for the currency. The product is saved in the GIFTS record as the local/other amount.

Local/Other Currencies in Requests

This section of the chapter describes where to find multi-currency information within a Request record. Later in the chapter we discuss how to use the multi-currency features shown below.

On Page 1

By default, GIFTS displays amounts on Page 1 of a Request in your *functional* currency. However, your GIFTS administrator has the option to make Requests show Project Budget, Requested Amount, and Recommended Amount using *local/other* amounts in that currency.

Here is Page 1 of a Request as it looks by default, displaying all amounts in your functional currency:

Here is the same Request in a GIFTS system where the Euro is the local/other currency for the Request and local/other amount is the primary display option:

Your GIFTS administrator has a separate option concerning the display of Project Budget amounts. It can be shown in your functional currency, or (as in this example) in the local/other currency specified for the Request.

If your GIFTS administrator specifies that the local/other currency is the primary display currency, amounts here will be shown in the other currency specified in the Currency field.

Why would your GIFTS administrator choose this option? If all or most your organization's grant-giving is made in one or more other currencies, it may be natural for its employees to think of amounts requested in terms of

the other currency. If you are regularly receiving international grant requests—and very few in your functional currency—your GIFTS administrator may decide that it makes more sense to have users enter the local/other amount right on the first tab of Requests.

On the Currencies Tab

Most of a Request's local/other currency information is found here on the Currencies tab:

The following options and information appear on the Currencies tab:

Local/Other Currency The local/other currency in which the Request is being tracked. You can select <None> if the Request is made in your functional currency.

Note that this field—like most multi-currency features—is not enabled after a Request is approved. Most of the time you will want to keep a Request as it was at the time of approval.

If you must change the local/other currency after a Request is approved, it will have to be rolled back to pending first.

When Exchange Rates change It is the responsibility of your GIFTS administrator to update local/other currencies when exchange rates change. When an exchange rate is changed, GIFTS recalculates pending Requests

that have that local/other currency specified. The question is, what amounts are recalculated? GIFTS provides the following options for when exchange rates change:

- GIFTS can adjust *functional* amounts, leaving the local/other amounts constant.

  In the case of pending Requests, "amounts" means Requested and Recommended Amounts. The local/other Requested and Recommended Amounts will stay the same, and the functional amounts will be recalculated.

- GIFTS can adjust *local/other* amounts, leaving the functional amounts constant.

  The functional Requested and Recommended Amounts will stay the same, and the local/other amounts will be recalculated.

- You can also have GIFTS recalculate neither functional nor local/other amounts when exchange rates change.

  This allows you to keep all two-currency pending Request amounts as they were when you entered them, free from the vagaries of the international currency market.

As noted above, you may not see this option at all. Your GIFTS administrator will choose one of these options for all multi-currency Requests. He or she may choose to enforce the option, in which case you will not see this field, and all pending Requests will be recalculated the same way. Or he or she may make it a default, allowing you and other users to change which amount (if either) is adjusted for a particular Request.

If you have the option, select it with care. More information is provided in "Adding or Modifying Currencies in Requests" on page 300.

Requested Amount, Recommended Amount, Grant Amount Three kinds of Request amount can be calculated separately using the designated local/other currency.

The fields shown below each kind of Request amount are described in "Adding or Modifying Currencies in Requests" on page 300. For now, we will note some general information about the uses of these three amounts.

When adding or modifying a Request, Request Amount and Recommended Amount can be entered here, or on Page 1. The values entered will carry over from one to another. When an amount is changed in one place, it will be changed in the other at the same time.

Grant Amount fields are never available for modification. They display the grant amount in functional and local/other currencies, based on the exchange rate designated at the time of approval.

Note: These amounts *can* change later, but only if you amend the grant, increasing or decreasing the grant amount.

On the Payments Tab

There are two things to note about the Payments tabs of Requests when you are using GIFTS multi-currency features:

In the Payment Summary As we noted in "On Page 1" on page 291, your GIFTS administrator may choose to make *local/other* amounts the primary display currency. If he or she has, the Payment Summary area of the Payments tab will list local/other amounts (instead of the default functional amounts), as shown here:

You can use these radio buttons to toggle between a Payment summary shown in your functional currency and one shown in the local/other currency.

In the Currency Tab The Currency tab summarizes the local/other currency or currencies used in the Payments associated with this Request.

(Each Payment for a single Request *can* have a different local/other currency specified.)

The data shown include the following:

Currency	Description
Currency	Each local/other currency designated in at least of the Request's Payments.
Count	The number of Payments with this local/other currency specified.
Amount	The total local/other amount of all Payments with this currency specified.
Paid	The total local/other amount of all *paid* Payments with this currency specified.

On the Activities Tab

We noted above that when your GIFTS administrator updates exchange rates, GIFTS may recalculate a Request's functional or local/other amounts. He or she has may also choose to have GIFTS create an Activity record noting any change in Request amounts when exchange rates change.

In each case where an exchange rate update changes a Requested Amount or Recommended Amount (be it the functional or local/other amount that

is recalculated), an Activity record associated with that Request will be created:

Local/Other Currencies in Payments

This section of the chapter describes where to find multi-currency information within a Payment record. Later in the chapter we discuss how to use the multi-currency features shown below.

On the Payment Tab

As in Requests, GIFTS by default displays amounts on the Payment tab of a Payment in your *functional* currency. However, your GIFTS administrator has the option to make Payments show Amount using the *local/other* amount in that currency.

Here is the first tab of a Payment as it looks by default, displaying all amounts in your functional currency. (In this and other examples in the manual, US Dollars will be used as the functional currency.)

Payment Amount will be shown here in your functional currency, unless your GIFTS administrator selects the option to use local/other currency instead.

Here is the same Payment in a GIFTS system where the Euro is the local/other currency of the Payment and local/other amount is the primary display option:

Since your GIFTS administrator has specified that local/other amounts will be displayed primarily, the Payment Amount is shown on the Payment tab in Euros (in this case, the local/other currency).

As noted above, your GIFTS administrator may choose this option if all or most your organization's grant-giving is made in one or more other

currencies. It may be natural for you to think of amounts paid in terms of the other currency.

On the Local/Other Currency Tab

Key multi-currency data and functionality for Payments is found on the Local/Other Currency tab:

The fields shown here are described in "Adding a Local/Other Currency Amount" on page 316. For now, we will note some general information about the uses of the Local/Other Currency tab:

- When adding or modifying a Payment, the Amount can be entered here, or on the Payment tab. The values entered will carry over from one to another.

- The local/other currency in which the Payment is being tracked is shown, along with the resulting functional and local/other amounts. You can select <None> if the Payment is to be paid in your functional currency.

  Note that these fields are not available after a Payment is paid. Most of the time you will want to keep a Payment as it was at the time it was paid.

❖ If you must change the local/other currency or the Payment amount after a Payment is paid, you will have to void the Payment, then reissue it.

On the Activities Tab of the Organizer

When your GIFTS administrator updates exchange rates, GIFTS may recalculate an unpaid Payment's functional or local/other amount. He or she has may also choose to have GIFTS create an Activity record noting any change in Payment amounts when exchange rates change.

In each case where an exchange rate update changes an unpaid Payment's amount (be it the functional or local/other amount), an Activity record associated with that Payment will be created. To see these Activities, zoom on the Payment in the Organizer and switch to the Activities folder:

Adding or Modifying Currencies in Requests

Adding or modifying currency information in Requests is described below. For steps outlining the complete process, please see "Adding or Modifying a Request" on page 210.

Currency information may be added or modified in the following Request tabs, depending on your GIFTS settings:

Request Detail (Page 1)

"Local/Other Currencies in Requests" on page 291 notes that Project Budget, Requested Amount, and Recommended Amount can be set up by your GIFTS administrator to display in a local/other currency, rather than in your functional currency:

Note: Requested Amount and Recommended Amount are available on Page 1 only in pending Requests. Once a Request is approved or declined, the amounts move to the Request's Page 2 tab.

- If this is the case, the Currency field also appears in the Pending Request section of the Page 1 tab. The default local/other currency selected in the Administrator Module is displayed. You can select another currency from Administrator Module's Exchange Rate Table—Requested Amount and Recommended Amount are now displayed in that currency.

  The data entered in the Currency, Requested Amount, and Recommended amounts fields on Page 1 automatically populate the same fields on the Currencies tab, described below.

- If your functional currency is the primary display currency, the Currency field does not appear on Page 1. Data in the Requested and Recommended amounts fields on Page 1 automatically populates the same fields on the Currencies tab. If you want to add a local/other currency to the Request, you can do so on the Currencies tab.

For details on all fields in this tab of the Request record, please see "Request Detail (Page 1)" on page 213.

Currencies Tab

On the Currencies tab of a Request, you can select a local/other currency, see its exchange rate, and adjust functional or local/other amounts as needed. If your GIFTS administrator has granted you access, you can also choose how Request amounts are adjusted when the exchange rate for the local/other currency is updated.

A pending Request's local/other currency information is shown here on the Currencies tab:

The following options are available on the Currencies tab:

Field	Description
Local/Other Currency	The local/other currency in which the Request is being tracked. All active currencies stored in the Administrator Module's Exchange Rate Table are available. You can select <None> if the Request was made in your functional currency. Note that this field—like most multi-currency features—is not available after a Request is approved. Most of the time you will want to keep a Request as it was at the time of approval. If you must change the local/other currency after a Request is approved, you must roll it back to pending first.

Field	Description
When Exchange Rates change	When an exchange rate is changed, GIFTS recalculates pending Requests that have that local/other currency specified. But what amounts are recalculated? GIFTS provides the following options for when exchange rates change: ❖ GIFTS can adjust functional Requested and Recommended Amounts, leaving the local/other amounts constant. ❖ GIFTS can adjust local/other Requested and Recommended Amounts, leaving the functional amounts constant. NOTE: If you choose one of these two options, and an adjustment is made to the pending Request due to an exchange rate update in the Administrator Module, the same adjustment will be made to any scheduled Payments that have been created for the Request. (If, while working with the Request record, you change the exchange rate by selecting another currency, or changing the currency's rate date, this won't cause the Payments to be updated.) One exception is if a Payment has had a different local/other currency specified. That Payment will only change if its local/other currency rate is adjusted (or a user changes the Payment manually). ❖ You can also have GIFTS recalculate neither functional nor local/other amounts when exchange rates change. NOTE: You may not see this option, depending on your GIFTS system settings. If this options is available, take great care in selecting it. You should be aware of its implications for the eventual grant total. For a fuller explanation of these options, please see "When Exchange Rates Change" on page 117 of the *GIFTS Administrator's Guide*.

Below these options are sets of data about three kinds of Request amount: Requested, Recommended, and Grant Amount. Requested Amount and Recommended Amount reflect the same data found in these fields on Page 1 of the Request (if it's still pending). Grant Amount is zero until the grant is approved; after that, it is available for display only.

For each kind of Request amount, the fields contain the same data:

Field	Description
Functional Amount	The functional Requested, Recommended, or Grant Amount. This amount can be adjusted. If you adjust it, the amount in the Local/Other Amount field will also change (in accordance with the Exchange Rate), and vice versa. For a discussion of these possibilities and their implications, please see "Reasons to Adjust Amounts in This Tab" on page 306.
Rate Date	Rate Date is essentially a way to change the exchange rate applied to amounts for this Request. How so? The GIFTS Administrator Module includes the option to track historical exchange rates. That is, every time an exchange rate is updated, its former rate—and the date on which it went into effect—are saved by GIFTS. If this option is on, you can change the date in this field to a previous date; if a different exchange rate was in effect on that date, GIFTS recalculates Request amounts using that rate. NOTE: To determine which amount is adjusted using the different rate—functional, local/other, or neither, GIFTS checks the option selected for "When Exchange Rates change" on this tab of the Request. If that is unavailable, GIFTS checks the multi-currency settings in the Administrator Module. For more information on the effects of an exchange rate change, please see "When Exchange Rates Change" on page 117 of the *GIFTS Administrator's Guide*.
Exchange Rate	Display only. The exchange rate for the currency that was in effect on the Rate Date. TIP: Hover your mouse pointer over the exchange rate to see the exact date on which the rate first took effect.

Field	Description
Local/Other Amount	The local/other Requested, Recommended, or Grant Amount (or, the amount in Functional Amount times the number in Exchange Rate.) This amount can be adjusted. If you adjust it, the amount in the Functional Amount field will also change (in accordance with the Exchange Rate), and vice versa. For a discussion of these possibilities and their implications, please see "Reasons to Adjust Amounts in This Tab" on page 306.

Reasons to Adjust Amounts in This Tab As noted above, you can adjust the entries in either the Functional or Local/Other Amount fields. Changing the number in one field changes the number in the other, based on the exchange rate. In what cases is it advisable to adjust these amounts?

It depends on the nature of your international gift-giving, and whether the amount you are considering giving is in your functional currency, or in the recipient's currency. This may change from grant to grant.

- If the Request (if approved) will be based on your functional currency, the local/other amount is for your own information. It allows you to see the value of a Request in the recipient's currency. You can track whether exchange rate changes will increase or decrease the value of the grant.
- If the Request (if approved) will be based on the recipient's currency, this Request feature becomes vital. The exchange rate allows you to calculate what the *functional* Recommended Amount must be when approved to meet the commitment you want to make in the other currency.

It is in this second case that you are most likely to adjust the amounts in the Local/Other Currency tab. More specifically, you can adjust the local/other amount to the agreed-upon amount. GIFTS recalculates the Request functional amount(s) based on the exchange rate.

Working with Multi-Currency Requests

Details concerning multi-currency options in common Request tasks are described in this section. The information here can be used in conjunction with "Working with Requests" on page 205.

Approving a Multi-Currency Request

"Approving a Request" on page 229 describes the approval process when you are not using GIFTS multi-currency features. If you are, there two changes you will notice, depending on your system's multi-currency preferences.

First, if the local/other currency is the primary display currency, the Amount field on the first page of the Approval Wizard shows the local/other amount:

In this example, the Euro is the local/other currency.

Second, an additional page of the Approval Wizard provides more multi-currency options.

Note: These options are displayed no matter what the primary display currency is.

After completing the Payment Information page of the Wizard (that is, after step 3 of "Approving a Request"), the Currency Information page of the Approval Wizard opens:

Select from the following options:

Field	Description
Functional Amount	The total Request amount in your functional currency. This field defaults to the Request amount you entered on the first page of the Approval Wizard. (If the first page of the Wizard displays the local/other amount, this field contains the functional equivalent, based on the exchange rate below.)
Local/Other Currency	The drop-down menu lists all the active currencies set up by your administrator. Select the currency you wish to calculate the Request in. This field defaults to the local/other currency specified in the Request. If Payments were *not* created for this Request when it was pending, the Payments you create for it during or after approval will inherit the same local/other currency and rate date (and thus the same exchange rate). If Payments already exist for this pending Request, options chosen here will not appear automatically in those Payments.

Field	Description
Rate Date	The default value here depends on whether or not your GIFTS system tracks historical exchange rates. If it does, this field defaults to the Award Date (i.e., the Date you entered on page 1 of the Approval Wizard). The Exchange Rate below will be whichever rate was in effect on that date. You can specify a different Rate Date if you want to make sure the local/other amount is calculated by the rate in effect on that date. If the rate was different, the value in the Exchange Rate field below will change. If you do *not* track historical exchange rates, the field defaults to the Rate Date for the currency. The date is displayed only and can't be changed.
Exchange Rate	This field is for display only. After you have selected a local/other currency and rate date, the appropriate exchange rate appears here. TIP: Hover your mouse pointer over the exchange rate to see the exact date on which the rate first took effect.
Local/Other Amount	The resulting calculation of a Request's value in the local/other currency appears here.
When exchange rates change	You can decide what adjustment you want made (if any) to unpaid Payments when the currency's exchange rate changes: adjust Payment amount, adjust local/other amount, or adjust neither amount. NOTE: This option may not be available in your GIFTS system; your GIFTS administrator has the option to prevent users from changing the setting they specify in the Administrator Module. If this is the case, the field will display the multi-currency preference enforced by the administrator. When setting this option, you should be aware of its implications for the grant total. For a fuller explanation of these options, please see "What Happens when the Exchange Rate Changes?" on page 119 of the *Administrator's Guide*.

You can now click Finish to approve the Request.

Renewing a Multi-Currency Grant

"Renewing Grants" on page 237 describes the process of renewing a grant. The process does not change with a multi-currency grant. We only want to note that the local/other currency specified in a grant you are renewing is *not* carried over to the resulting new Request.

Amending a Multi-Currency Grant

"Amending a Grant" on page 240 describes the process of amending a grant. If the grant has a local/other currency specified, multi-currency options are available:

The current functional and local/other amount of the grant are displayed.

- If your GIFTS system tracks historical exchange rates, the exchange rate used in the approved Request is also shown. You can specify a rate date in the Exchange Rate field; the rate in effect on that date will be displayed instead, and used to calculate the amended functional and local/other amounts.

❖ If you do *not* track historical exchange rates, the Exchange Rate option changes from a date field to an option between the rate in effect on approval, or the current rate:

Your choice here is between the exchange rate that was in effect when the Request was approved, or the current exchange rate. This option is useful if you once tracked historical rates, but no longer do. If you have never tracked historical rates, the rate will be the same no matter which option you choose.

In either case, you can then choose to adjust either the functional or local/other amount—when you do, the other will change in accordance with the exchange rate shown. Note that this exchange rate and these amounts apply only to the amount of the increase or decrease of the grant.

Approving a Batch of Multi-Currency Requests

"Approving a Batch of Requests" on page 246 describes the complete process of batch processing Request approval. Here we want to note that an additional page in the Approval Wizard opens when your GIFTS system is using multi-currency features.

After completing the Payment Information page of the Wizard (that is, after step 4 of "Approving a Batch of Requests"), the Currency Information page of the Approval Wizard opens:

Select from the following options:

Field	Description
Functional Amount	This field will read "Recommended" or "Calculated," depending on the option shown in "When exchange rates change" below. If "When exchange rates change" indicates that the local/other amount should be recalculated when exchange rates change, or that neither type of amount should be recalculated, this will read "Recommended." This means that for each Request, the Recommended Amount on Page 1 of the Request will remain constant, and the Local/Other Amount below calculated based on the exchange rate. If "When exchange rates change" indicates that the *functional* amount should be recalculated when exchange rates change, this will read "Calculated" (and Local/Other Amount below will be Recommended). *Local/other* Recommended Amount will remain constant, and Functional Amount recalculated when and if exchange rates change.

Field	Description
Local/Other Currency	The drop-down menu lists all the active currencies set up by your administrator. Select the currency you wish to calculate the Request in. If a Request in the batch already has the local/other currency specified, your choices here will *not* be saved for that Request. Only Requests in the batch with no second currency specified will be given the values entered here. If Payments were *not* created for a Request when it was pending, *and* the Request has no second currency already specified, then the Payments you create for it during approval will inherit the same local/other currency and rate date (and thus the same exchange rate). If Payments already exist for this pending Request, options chosen here will not appear automatically in those Payments.
Rate Date	Defaults to the current date. If your GIFTS system tracks historical exchange rates, and you want to make sure you get the rate that was in effect and a particular date, enter it here.
Exchange Rate	The exchange rate of the local/other currency specified above, on the rate date specified above. TIP: Hover your mouse pointer over the exchange rate to see the exact date on which the rate first took effect.
Local/Other Amount	This field will read “Recommended” or “Calculated,” depending on the option shown in “When exchange rates change” below. If “When exchange rates change” indicates that the local/other amount should be recalculated when exchange rates change, or that neither type of amount should be recalculated, this will read “Calculated.” This means that for each Request, the Recommended Amount on Page 1 of the Request will remain constant, and the Local/Other Amount here calculated based on the exchange rate. If “When exchange rates change” indicates that the *functional* amount should be recalculated when exchange rates change, this will read “Recommended” (and Functional Amount above will be calculated). *Local/other* Recommended Amount will remain constant, and Functional Amount recalculated when and if exchange rates change.

Field	Description
When exchange rates change	You must decide what adjustment you want made (if any) to unpaid Payments when the currency's exchange rate changes: adjust functional amount, adjust local/other amount, or adjust neither amount. NOTE: This option may not be seen in all GIFTS systems. If your GIFTS administrator does not allow users to override the adjustment preference set in the Administrator Module's multi-currency preferences, this option will not appear in the Approval Wizard. When setting this option, you should be aware of its implications for the grant total. For a fuller explanation of these options, please see "What Happens when the Exchange Rate Changes?" on page 119 of the *Administrator's Guide*.

You can now click Finish to approve the Requests.

Working with Multi-Currency Payments

Details concerning multi-currency options in common Payment tasks are described in this section. The information here can be used in conjunction with "Working with Payments" on page 261.

The Local/Other Currency Tab

The Local/Other Currency tab allows you to calculate the Payment amount in another currency, based on the exchange rate and "rounding factor" established in the Administrator Module:

Initially calculating a Payment amount in another currency is fairly straightforward. Modifying amounts in other currencies can be more complicated, as it can affect Payment (and thus total grant) amounts.

Adding a Local/Other Currency Amount

Select the Local/Other Currency tab, then add a currency for the Payment:

Note: If this Payment was created from a Request that had a second currency already specified, those local/other currency settings are initially inherited here. They can be changed for unpaid Payments. Once a Payment is paid, you can only adjust currency information by voiding the Payment, then reissuing it.

The following options are available on the Local/Other Currency tab of Payments:

Field	Description
Functional Amount	The Payment amount in your functional currency. This field defaults to the Payment amount in the Payment tab. (If the local/other currency is the primary display currency, the local/other amount is shown in the Amount field on the Payment tab. In this case, this field contains the functional equivalent, based on the exchange rate below.) This amount can be adjusted. It will also change if you adjust the local/other amount, in accordance with the exchange rate shown below. For a discussion of these possibilities and their implications, please see "Reasons to Adjust Amounts in This Tab" on page 317.

Field	Description
Local/Other Currency	The drop-down menu lists all the active currencies listed in the Administrator's Exchange Rate Table. Select the currency you wish to see the Payment amount calculated in. NOTE: Different Payments for a single Request can be calculated in different local/other currencies.
Rate Date	Rate Date is useful if you need to adjust a Payment based on the exchange rate on a date in the past; perhaps the date on which you approved the Request, rather than the later date on which you are adding the Payment. If your GIFTS system is set up to track historical exchange rates, you can adjust the Rate Date and get the exchange rate that was in effect on that date. NOTE: To determine which amount is adjusted using the different rate—functional, local/other, or neither, GIFTS checks the option selected for "When Exchange Rates change" on this tab of the Request. If that is unavailable, GIFTS checks the multi-currency settings in the Administrator Module. For more information on the effects of an exchange rate change, please see "When Exchange Rates Change" on page 117 of the *GIFTS Administrator's Guide*.
Exchange Rate	This field is for display only. After you have selected a Local/Other Currency and the Rate Date, the appropriate exchange rate appears here.
Local/Other Amount	The resulting calculation of a Payment's value in the other currency appears here. The reasons you might want to adjust this figure, and how that can affect your Payment and grant amounts, are addressed in the next topic.

Reasons to Adjust Amounts in This Tab

As noted above, you can adjust the entries in either the Functional Amount or the Local/Other Amount field. Changing the number in one field changes the number in the other, based on the exchange rate. In what cases is it advisable to adjust these amounts?

It depends on the nature of your international gift-giving, and whether the amount you have committed to has been established in your home currency,

or the other currency in use by the recipient. This may change from grant to grant.

Currency exchange rates fluctuate over time. Grant Payments are often paid over time; as exchange rates change, the value of a Payment changes with it. The currency tracking feature allows you to adjust to those changes.

- If the award amount has been agreed upon based on your home currency, the local/other amount is for your own information. It allows you to see the value of a Payment in the recipient's currency. You can track whether exchange rate changes have increased or decreased the value of the grant.
- If the award amount has been agreed upon based on the recipient's currency, this Payment feature becomes vital. The exchange rate allows you to calculate the amount your Payment must be in your home currency to meet the commitment you made in the other currency.

It is in this second case that you are most likely to adjust the amounts in the Local/Other Currency tab. More specifically, you can adjust the local/other amount to the agreed-upon amount. GIFTS recalculates the Payment amount (in your home currency) based on the exchange rate.

Modifying the Payment and Local/Other Amounts

To modify the Payment amounts:

1. Open the Payment and click the Local/Other Currency tab.
2. Adjust either the Functional Amount or Local/Other Amount; the other field will be recalculated automatically, based on the exchange rate currently shown. (It will be recalculated, if necessary, if you change the Rate Date as well.)
3. Click Save and Close. A message may appear informing you that the total amount scheduled to be paid now exceeds (or is less than) the grant amount by X, "X" being the amount the Payment amount has decreased/increased.

   Note: Depending on the multi-currency preferences set up by your GIFTS administrator, this message may not appear. Administrators have the option of setting GIFTS to ignore discrepancies between a multi-

currency grant amount and the total of its Payments. You should also note that the message may only appear when the total of adjusted Payments *exceed* the grant amount. Administrators can specify that GIFTS should not change grant amount if the total of Payments decreases (becoming less than the grant amount). In that case, you could add another Payment to make up the difference.

The message informs you that you must amend the grant amount or you cannot save the Payment, then asks you if you want to amend the grant amount:

- Click Yes if you wish to amend the grant, then follow the instructions for "Amending a Grant" on page 240.

  The Payment is saved. If you use the GIFTS Budget Module, and the Payment was previously resolved against your budget, GIFTS automatically "re-resolves" the Payment so that the budget reflects the new Payment amount.

  Note: If the budget line item or reserve fund against which the Payment is resolved does *not* have sufficient funds to cover the increased Payment Amount, the Payment will *not* be changed. A message appears noting that, due to insufficient funds, the Payment or Payments have not been updated.

- If you do not wish to amend the grant, click No. Changes to the Payment are not saved.

Changes to the exchange rate itself can also modify amounts for Payments already calculated in that particular currency. For more information on changing exchange rates and how they affect Payment amounts, please see "What Happens when the Exchange Rate Changes?" on page 119 of the *Administrator's Guide*.

12 Working with Requirements

This chapter describes how to assign and manage Requirements like progress reports and payment contingencies. Requirements can be assigned to either Requests or Payments.

In This Chapter

About Requirements **322**

Accessing Requirements **322**

Searching for Requirements **326**

Adding and Modifying Grant Requirements **327**

Adding and Modifying Payment Requirements **331**

Assigning Staff to a Batch of Requirements **333**

Marking a Single Requirement as Done **335**

Deleting a Requirement **337**

Exporting Requirements to Outlook **338**

Creating an IGAM Account for a Grantee **339**

Sending an Online Requirement to a Grantee **341**

Removing an Online Requirement from the Web **345**

About Requirements

GIFTS allows you to track two kinds of Requirements that are due from your grantees as conditions of the grant.

Proposal/Grant Requirements are attached to a specific grant due as part of the proposal-tracking or grant-tracking process, and usually entered as a schedule, such as a series of progress reports followed by a final report. Some grant makers require site visits or review meetings during the life of a grant. Any required activity that you place on your grantees can be a Grant Requirement.

Payment Requirements are attached to a specific Payment and—if you make the Payment Contingent upon the Requirement—prevent it from being Paid until the Requirement is met. For instance, if you fund challenge grants, a Payment on a challenge grant should not be paid until the Organization has met the challenge.

Note: The available Requirement Type codes for your system—such as "Progress Report" and "Site Visit"—are defined by the GIFTS Administrator, who can add the codes you need to the Activity Type Code Table.

Tip: In GIFTS, Requirements are a subcategory of Activity records. They are available in the Organizer's Activities folder, the Activities Calendar view, and other places where Activities are displayed. The GIFTS Report Library includes reports that print schedules of open Requirements.

Accessing Requirements

There are several ways to access Requirements in order to view and modify them:

Accessing Requirements in the Organizer..... **323**

Accessing Requirements in the Calendar **324**

Accessing Requirements in a Request or Payment **325**

Accessing Requirements in the Organizer

To view Requirements in the Requirements folder of the Organizer, you can either:

- Use the Quick Find search for the Requirements folder.
- Zoom in on the Request or Payment that you want to focus on. The Requirements folder of the Organizer is populated with the Requirements for that record.

Following is a view of the Requirements folder after it has been populated by zooming in on the Requests for the Arlington School of Dentistry.

By default, Requirements are sorted by their date, descending from the most future or recent Requirements. You can customize the format, sort order, and content of the information in the Organizer, as described in "Working

with the Organizer" on page 37. By default, the following information is displayed in the Requirements folder.

Column	Description
Locked Status	A padlock is displayed if the Requirement's Request has been locked. If the lock is green, you can edit the Requirement. If it is red, you cannot.
What/When	The Type of Requirement, its due, received, and done dates, and the Login ID of the staff member assigned to it. If the Requirement Status is Done, the Login ID of the user that marked it as Done is displayed.
With	The Organization, Contact, Request, and/or Payment with which the Requirement is associated.
Notes	Any notes entered regarding the Requirement.
Audit	The dates on which the record was created and last modified, and the Login IDs of the users that created and last modified the record.

The listed Requirements are color-coded to indicate their Status: Open, Done, or Overdue.

Accessing Requirements in the Calendar

To view Requirements in the Calendar, choose View ➤ Calendar from the Main menu. In the Class field, you can choose to display all Activity Classes or to show only Grant Requirements or Payment Requirements.

For more information on finding and displaying information in the Calendar, please see "Working with the Calendar" on page 435.

Accessing Requirements in a Request or Payment

To view Requirements from within a Request or Payment, open the record and click on the Requirements tab. The Requirements associated with it are displayed.

You can filter the Requirements using the Type and Requirements Due fields displayed at the top of the grid. In the example above, the Requirements are filtered to display the progress reports that are due within the next month. If you do not check the Requirements Due box, all Requirements of the Type you select are displayed.

Field	Description
Type	The Type of Requirement, such as 'Final Report' or 'Signed Contract.' These are defined by the GIFTS administrator.
Requirements Due	The date range in which the Requirement Due Dates fall, such as 'Within 2 weeks' or 'Within 6 months.'

Searching for Requirements

You can search the Requirements folder using any of the search techniques described in "Searching for Data in GIFTS" on page 77. This section details each of the Quick Find search properties for Requirements.

You can search on any combination of the following properties.

Property	Description
Coding Sheet	Click this option to build a query using the Request Coding Sheet.
Contact's Last Name	The last name of the Contact associated with the Requirement.
Done Date	The date on which the Requirement was marked as Done.
Done User	The member of your staff who marked the Requirement as Done.
Due Date	The date on which the Requirement is due.
Form	The name of the requirements form used to publish a Requirement to the Web.
Organization's Name	The name of the Organization on which the Requirement has been placed. For Grant Requirements, it is the Organization to which the Request belongs. For Payment Requirements, the payee Organization identified in the Payment record.
Received Date	The date on which the Requirement was received.

Property	Description
Request ID	The unique, system-generated ID number of the Request with which the Requirement is associated.
Request Type and Status	The Request type—such as 'Cash Grants'—to which the Request belongs, and its status within your workflow.
Requirement is Open	Click this option to search for Open Requirements.
Requirement is Overdue	Click this option to search for Overdue Requirements.
Requirement is Received	Click this option to search for Requirements that have been received (such as progress reports), but not yet marked Done.
Staff	The member of your staff assigned to the Requirement.
Type	The Type of Requirement, such as Final Report or Signed Contract.

Adding and Modifying Grant Requirements

Grant Requirements are due as part of the proposal-tracking or grant-tracking process, and are usually entered as a schedule, such as a series of progress reports followed by a final report. Some grant makers require site visits or review meetings during the life of a grant. Any required activity that you place on your grantees can be a Grant Requirement.

Tip: Your Administrator can set up a Default Requirement Schedule to automatically schedule standard Requirements for proposals and grants. For more information, please refer to the *Administrator's Guide*.

There are several ways to create a new Requirement for a Request:

- Select File ➤ New ➤ Grant Requirement from the main menu.

- In the Requirements folder of the Organizer, click the New button in the folder toolbar.

Using one of the two methods above, you will open a new Requirement with no Request information entered. You can enter that information yourself, as shown below.

If you use one of the two following methods of creating a new Grant Requirement, the Requirement will open with the Request ID / Reference Number, grantee Organization, and the Request's primary Contact already entered:

- In the Requests folder of the Organizer, zoom in on the Request. Then, go to the Requirements folder and click the New button in the folder toolbar.
- From the Requirements folder of the Organizer, open the Request. Then, go to the Requirements tab of the Request and click New.

To modify an existing Requirement:

- In the Requests folder of the Organizer, zoom in on the Request. Then, go to the Requirements folder. Highlight the Requirement choose File ➤ Open from the Main menu.
- In the Organizer, open the Request. Then, go to the Requirements tab of the Request, select the Requirement, and click Edit.

The Status of the Requirement is indicated here.

A new Requirement is first scheduled for the current day. If you change the Due Date, the number of days until the Due Date (or the number of days the Requirement is overdue) will appear here.

The Find Request ID or Ref. No. field and Find button are available when creating or modifying a Grant Requirement. These features are described in "Finding a Request from within a Requirement" on page 330.

Once the Request ID or Reference Number has been entered, it is displayed in this view-only field.

The following fields are available.

Field	Description
Organization	The Organization associated with the Request. If you opened this new Requirement by first zooming on a Request, or by clicking New in the Requirements tab of an open Request, the grantee Organization is already filled in. If you are creating this new Requirement from a blank form, use the Find button to search for the Organization.
Contact	The primary Contact for the Request. If you opened this new Requirement by first zooming on a Request, or by clicking New in the Requirements tab of an open Request, the primary Contact for the Request is already filled in. If you are creating this new Requirement from a blank form, the primary Contact is entered when you select the Request ID/ Reference Number. In either case, you can modify the Contact field by opening the field's drop-down menu. All Contacts associated with the Request's Organization—and that Organization only—are available.
Req. ID / Ref No.	The ID Number and/or Reference Number of the Request. If you opened this new Requirement by first zooming on a Request, or by clicking New in the Requirements tab of an open Request, the Request's ID and/or Reference Numbers are already filled in. (The field and Find button are still available if you need to modify the Requirement.) If you are creating this new Requirement from a blank form, use the Find Request ID or Ref. No. field and/or the Find button to search for the Request. For information on using the Request find options, please see "Finding a Request from within a Requirement" on page 330.
Staff	The member of your staff responsible for following up on the Requirement. This field defaults to the staff member assigned to the associated Request.
Type	The type of Requirement. The available types are defined by your Administrator.
Due	The date on which the Requirement is due.

Field	Description
Received	The date on which the material or task that fulfills the Requirement is received or completed. This field is optional; you can mark Requirements as Done without entering a Received Date. The Received Date is useful for Requirements such as progress reports, allowing you to note that the required material has been submitted, if not yet reviewed and approved. Requirements with a Received Date maintain a status of Open.
Done	For finished requirements, the date on which the Requirement was met. Leave this date blank unless the Requirement has been met.
Notes	Any notes pertinent to this Requirement, such as the specific nature of what is due.
Online Requirements	If a requirement form for this Requirement has been published in IGAM, this section displays the requirement form title, the date it was published, and the date it was retrieved in IGAM.

If you wish to record additional information about the Requirement, you can click on the Long Notes tab and enter it. When you are finished working with the Requirement, click Save and Close.

Finding a Request from within a Requirement

If you know the ID or Reference Number of the Request to which you are adding a Requirement, you can enter it in the Find Request ID or Ref. No. field. If only one matching Request is found, the Organization and Contact fields will be updated as well. If the Request is not found, or if more than one matching Request is found (for example, if they have the same Reference Number), the Search for Requests window will open.

The field can also be used in conjunction with the search button. If you know part of the ID or Reference Number, use the asterisk (*) as a wild card and then click the Find button. Your search will be limited to those Requests with matching ID and/or Reference Numbers.

If you know the Organization with which the Request is associated, you can enter this information in the Requirement before searching for Requests.

Your Request search will then be limited to those associated with that Organization.

To search for Requests from within the Requirement form:

1 Click the Find button. The Search for Requests window opens:

The search parameters are displayed here.

In this particular case, United Federation, Inc. has already been entered in the Organization field of the Grant Requirement. If you do not first specify and Organization, the search will be blank.

The results of the search are displayed in the grid. Change your search parameters and click Search to update the results.

The following columns of Request details are displayed from left to right: Locked status, Alerts, Disposition, Type/Status, Organization, Requested/Granted amount, Project Title, Fund/Program, the ID and/or Reference Number, and Audit trail.

2 From the drop-down menu, select 'Contains,' 'is Exactly,' or 'Starts with.' In the ID/Reference number field, enter the digits you know. Use the asterisk (*) as a wild card. Click Search.

3 Find the Request in the Search for Requests grid. Highlight the Request and click OK.

The Search for Requests window closes. In the Requirement form, the Request ID/Reference number, the Organization, and the Contact have been updated.

Adding and Modifying Payment Requirements

You can also create Requirements for individual Payments. For example, you might require a signed contract from the grantee before a Payment is made.

When you add a Requirement for a Payment, you can change the Status of that Payment to Contingent. A Contingent Payment cannot be marked as Paid until the Requirement is marked as Done.

To add a Payment Requirement:

1 Access the Requirement form in one of the following ways:

- ❖ Open the Request record for the Payment. Then, go to the Payments tab, highlight the Payment you are making Contingent, and click the New Req'mt button on the Payment Schedule.
- ❖ Open the Payment record and go to the Requirements tab. Click New.
- ❖ In the Payments folder of the Organizer, zoom on the Payment and select File ➤ New ➤ Grant Requirement from the main menu.

A new Payment Requirement is displayed.

The Status of the Requirement is indicated here.

A new Requirement is first scheduled for the current day. If you change the Due Date, the number of days until the Due Date (or the number of days the Requirement is overdue) will appear here.

2 Enter the Requirement information.

Field	Description
Staff	The member of your staff responsible for following up on the Requirement. This field defaults to the staff member assigned to the Request.
Type	The type of Requirement. The available types are defined by your Administrator.

Field	Description
Due	The date on which the Requirement is due.
Received	The date on which the Requirement is received. This field is optional; you can mark Requirements as Done without entering a Received Date. The Received Date is useful for Requirements such as progress reports, allowing you to note that the required material has been submitted, if not yet reviewed and approved. Requirements with a Received Date maintain a status of Open.
Done	For finished requirements, the date on which the Requirement was met. Leave this date blank unless the Requirement has been met.
Notes	Any notes pertinent to this Requirement, such as the specific nature of what is due. For more space, you can go to the Long Notes tab of the Requirement.
Mark Payment as Contingent	Enable this option to automatically change the Status of the Payment to Contingent. Otherwise, the Payment can be marked as Paid before this Requirement is marked as Done.
Online Requirement	If this Requirement was published to the Web to be used in conjunction with IGAM, this section indicates the requirement form used, the date it was published from GIFTS, and the date it was retrieved from IGAM.

3 If you wish to record additional information about the Requirement, you can click on the Long Notes tab and enter it.

4 Click Save and Close to save the Requirement. If you chose to mark the Payment as Contingent, a message notifies you that this has been done.

To modify an existing Payment Requirement, you can access it in the Requirements folder of the Organizer, the Requirements tab of the Request, or the Activities Calendar.

Assigning Staff to a Batch of Requirements

You can select a batch of Requirements and assign a single staff member to them in one action. This might be particularly useful if one member of your staff is temporarily taking responsibility for Requirements monitored by another.

First you must select the Requirements you want to modify. To continue the example just described, you could use Quick Find in the Requirements folder to search for records by staff member over a certain period of time.

Once you have displayed the Requirements you want to change, perform the following to assign a staff member:

1. In the Organizer, highlight the records you want to change.
2. From the main menu, choose Action ➤ Assign Staff. The Assign Staff window opens:

3. From the drop-down menu, select the staff member to whom you wish to assign the selected Activities, the click OK.

   You will be prompted to confirm this change; click Yes to continue. A process log will summarize your action:

Note: In order to assign staff to Requirements, your Administrator must grant you permission to update Requirements. If you do not have adequate GIFTS permissions, you will receive an error message, and no records will be changed.Marking Requirements as Done

When a Requirement has been completed, it must be marked as Done in the system. This prevents it from appearing in reports and queries of Requirements that are still pending and, in the case of Payment Requirements, releases the Payments contingent upon them.

Marking a Single Requirement as Done

If you are working with Requirement in the Calendar view or you have highlighted a Requirement in the Organizer, you can mark the Requirement as Done without opening the record itself.

If you want to use the current date as the Done Date, and you do not wish to add notes to the Requirement, do either of the following:

- Open the grant record and go to the Requirements tab to display its Requirements Schedule. Then, highlight the Requirement and click Mark as Done.
- Highlight the Requirement in the Daily view of the Activities Calendar. Then, choose Action ➤ Mark as Done from the Calendar menu.

To choose a different Done Date, or to add notes to the Requirement as you mark it done, do either of the following:

- Open the Requirement (from the Organizer's Requirements folder, the Requirements Schedule of a grant, or the Calendar view) and click the Mark as Done button. Change the Done Date if you wish (it will default to the current date), edit the Notes and/or Long Notes fields, and click Save and Close.
- Highlight the Requirement in the Organizer's Requirements folder and choose Action ➤ Mark as Done from the Main menu.

The Done Date field defaults to the current date, but you can change it if you want. Also enter any comments you have in the Notes field; they will be saved in the Requirement record.

The Requirement is marked as Done. The system changes the Status of the Requirement to Done, identifies the current date (according to your system clock) as the Done Date (unless you have edited that date), and identifies you as the user that marked the Requirement as Done.

Re-Opening a Done Requirement

If you mark a Requirement as Done by mistake and wish to change its Status back to Open, open the Requirement (from the Organizer's Requirements folder, the Requirements Schedule of a grant, or the Calendar view) and click the Undo button. The status returns to Open, and the Done Date is deleted.

Marking a Batch of Requirements as Done

You can mark a batch of Requirements as Done without having to access each individual Requirement. GIFTS will prompt you for a Done Date, as well as any Notes you would like to add onto the existing notes for the selected Requirements.

To select a group of Requirements for batch processing, use a search or zoom to display them in the Organizer grid and highlight the Requirements that you wish to process. It's all right if Requirements you do not wish to include in the batch are displayed—you can easily exclude these Requirements.

To highlight more than one Requirement, hold down CTRL as you click on the Requirements, or use the Select All option. Each Requirement you click on is highlighted, and you can de-select Requirements by clicking on them again.

To mark a batch of Requirements as Done:

1. In the Requirements folder of the Organizer, highlight all of the Requirements you wish to mark as Done.
2. From the Main menu, choose Action ➤ Mark as Done.
3. Select the Done Date if it is different than the current date, and indicate any appropriate Notes for this batch of Requirements.

4 Click OK to begin the processing. GIFTS processes the batch and displays a log of the results.

5 Check the log to verify that all of the Requirements were processed, and note any discrepancies. You can click Print or Save As to keep the log for your records.

6 Click Close to exit the log.

Deleting a Requirement

You can delete a Requirement at any time. The associations of the Requirement with any Organization, Contact, or Requests are eliminated; however, the Activity record is the only record that is actually deleted.

If the Requirement is a Payment Requirement and a Payment is Contingent upon it, the Status of the Payment becomes Scheduled when you delete the Requirement since there is no longer a contingency that needs to be met.

Note: If the Requirement has been published to the web, you cannot delete it. For more information about the publish to web feature, see "Sending Online Requirements from GIFTS" on page 155 of the *IGAM 5 User's Guide*.

To delete a Requirement:

1 Open the Requirement.

2 From the Requirement menu, choose File ➤ Delete. You are prompted to confirm that you want to delete the Requirement.

3 Click Yes. If a Payment was contingent on the Requirement, its Status is changed to Scheduled and you are notified with an informational message.

Exporting Requirements to Outlook

If you use Microsoft Outlook to keep track of your to-do lists and daily schedule, exporting GIFTS Requirements to Outlook can make this job quicker and easier. Requirements are exported to Outlook as Outlook Tasks.

Note: When you export Requirements to Outlook, GIFTS can export the Contacts associated with those records as well. Contacts can also be exported to Outlook from the Contacts folder in the Organizer. For more information, please see "Exporting Contacts to Outlook" on page 370.

You can export GIFTS Requirements to Outlook from the Requirements folder or from the Activities folder; the steps are the same. For details on how to export Requirements to Outlook, please see "Exporting Activities to Outlook" on page 428.

Tip: Once GIFTS Requirements have been exported to Outlook, you can edit them like other Outlook Tasks. Please note, however, that you cannot export updated information from Outlook back to GIFTS. This is particularly important to note when Requirements are done: If their Status isn't changed in GIFTS, Contingent Payments can't be paid.

How GIFTS Requirements are Scheduled in Outlook

When you export a GIFTS Requirement to Outlook as a Task, you should be aware of how the Task will be scheduled, and what Requirement data will be included.

Below is a sample Grant Requirement as it appears as an Outlook Task:

Outlook Task Field	GIFTS Data Source
Subject	Requirement Type (in this case, 'Progress Report') followed by the Organization associated with the Requirement.
Due Date	Requirement Due Date
Status	If the Requirement is still open, the Task's Status will be 'Not Started.' Done Requirements will have a Task Status of 'Completed.'

Other details from the GIFTS Requirement record appear in the body of the Outlook Task.

Creating an IGAM Account for a Grantee

Note: The following features are for IGAM users only.

If you have IGAM, you can create an IGAM account for a grantee in order for him or her to complete an online requirement form.

To create an IGAM account for a grantee:

1 From GIFTS, select the Request that contains the Requirement for which you want to collect requirement data.

Note: If the grantee for the Request already has an IGAM account, the Create IGAM Account option is grayed out. Select Display IGAM Account to view the grantee's IGAM account information for the selected Request.

2 From the Action menu, select Create IGAM Account. The Create IGAM Account window appears.

Note: If you are using the multiple sites functionality, the Create IGAM Account window will contain an Account option. This allows you to select the site in which to give access to the grantee. An error message appears if there are no active requirement forms for that site. For more information about multiple sites, see "Managing Multiple Sites" on page 265.

3 Enter the grantee's email address in both fields, and then click OK. A confirmation email will be sent to the email address provided. The grantee now has an IGAM account and can log into his or her My Account page to access the online requirement.

Note: If the grantee already has an IGAM account, a message appears asking if you want to link to the existing account. If you do, no email is sent to the grantee.

Sending an Online Requirement to a Grantee

After you have created one or more requirement forms in IGAM, you can send an online requirement to a grantee to whom you want to collect requirement information. Since the grantee accesses the online requirement from his or her IGAM My Account page, he or she must have an IGAM account. For more information about creating an IGAM account, or checking the account status of a grantee, see "Creating an IGAM Account for a Grantee" on page 339.

To send an online requirement to a grantee:

1 From GIFTS, select and zoom on the Request that contains the Requirement for which you want to collect requirement data.

2 Click the Requirements folder and open the Requirement for which you want to collect data.

3 From the Action menu, select **Publish to Web**. The Publish Requirements window appears.

Note: You can send online requirements in batch by selecting multiple Requirements, and then selecting Action ➤ Publish to Web from the main menu.

Note: If you are using the multiple site IDs functionality, you can only choose from requirement forms that share the same account (or site) as the Request you selected. For more information about multiple site IDs, see "Managing Multiple Sites" on page 265 of the IGAM User's Guide.

4 Select the requirement form you want to send to the grantee from the drop-down menu.

The **Grantee Email Address** will display the email address of the current Request owner.

If you have the Transfer Requirements permission, you may choose to send the Requirement to a different IGAM account user by entering their email address in the field.

5 Click **OK**. A confirmation message appears.

Note: If you would like to generate correspondence for the grantee, select the Generate Correspondence checkbox. For information about generating correspondence, see "Creating Correspondence and Write-ups" on page 458 in the *GIFTS User's Guide*.

Important: Please note that the grantee is not automatically notified when the requirement is published to the web. In order for the grantee to view and complete the online requirement, he or she must access the online requirement from his or her My Account page. It will appear in the New Requirements list of the Requirements page.

Transferring One or More Requirements

In order to transfer a Requirement to another owner, the user must select it, or have the record opened before accessing the Transfer option. Multiple Requirements can be selected.

Note: All selected Requirements must already have an IGAM account assigned. If not, the Transfer IGAM Account option will not be available in the Action menu.

When the **Transfer IGAM Account** option is selected, you will be able to enter a different email address to send the Requirement request to.

The batch process transfers all selected records to the given e-mail address, even if selected records have different associated accounts, or if they are not associated with an account.

A Process Monitor screen will display with all successes, errors and details provided.

If **Generate Correspondence** is checked, after clicking **OK** the Generate Correspondence Wizard will open where you can select from one of the available Requirements templates.

The primary contact for the organization will be the default recipient. The main purpose of this is to notify the primary contact of the organization that ownership is being transferred for one of the Requests/Requirements within their organization.

If an email template is chosen, additional existing contacts/affiliations in GIFTS may be included.

Removing an Online Requirement from the Web

You can remove an online requirement from the web if you no longer want to allow a grantee access to it. If you do this, any data entered by the grantee on the online requirement that has not been retrieved will be deleted.

Note: You cannot delete an online requirement once it has been submitted.

To remove an online requirement from the web:

1. From GIFTS, select and zoom on the Request that contains the online requirement you want to remove from the web.

2 Click the Requirements folder and open the Requirement that has the online requirement you want to remove from the web.

3 From the Action menu, select Delete from Web. A warning message appears.

Note: You can delete online requirements in batch by selecting multiple Requirements, and then selecting Action ➤ Delete from Web from the main menu.

4 Click OK. A confirmation message appears. Click OK.

13 Working with Contacts

In much the same way that you maintain a Rolodex™ or business card file on your desk, GIFTS can help you keep track of all of the people with whom you work. This chapter describes how to use the Contact tracking features of GIFTS.

Note: The Contact tracking features are not available to Essential GIFTS clients who do not have the Contact Manager option.

In This Chapter

About Contacts **348**

Accessing Contacts **349**

Searching for Contacts **350**

The Contacts Folder **351**

Adding and Modifying Contacts **353**

Assigning Mailing Lists to a Batch of Contacts **367**

Using Contact Alerts **368**

Deleting Contacts **370**

Exporting Contacts to Outlook **370**

About Contacts

In the Contacts folder, you record the name, address, telephone numbers, and biographical data of all of your contacts. You can then use Affiliations to link Contacts to as many Requests, Organizations, and Activities as you wish.

In essence, the Affiliations allow you to build a Rolodex™ for each Organization and each Request in your system. You can view all of the Organizations and Requests associated with a Contact, all of the Contacts affiliated with a Request, and so forth. The following chart illustrates the ways in which a Contact can be related to Organizations, Requests, and Activities.

Related Folder	Contact Relationship
Organizations	Can be the Primary Contact of an Organization, related as an additional Contact for the Organization, or serve as an additional Contact for any Request entered for the Organization. Each Contact usually has a Primary Organization, which generally is their employer.
Requests	Can be the Primary Contact for a Request, an additional Contact for a Request, or related to the Organization making the Request.
Activities	The Contact for the Activity.

Within Organization and Request records, the Primary Contact is identified on the first tab of the record (either the Organization tab or the Request's Page 1 tab). Additional Contacts are displayed in the Affiliations tab of the Organization or Request.

Contact Affiliations are managed mostly through the Organization and Request records with which your Contacts are Affiliated, as described in "Organization Affiliations" on page 194 and "Request Affiliations" on page 222.

Accessing Contacts

There are two ways in which you can access Contacts:

- From the Contacts folder of the Organizer
- From the Affiliations tab of an Organization or Request record

To view Contacts in the Contacts folder, you can:

- Use the Quick Find search for the Contacts folder.
- Zoom in on the Request, Organization or other item that you want to focus on; the Contacts folder will be populated with the Contacts for that item.

To view the Contacts affiliated with an Organization or Request, you can open the record for the Organization or Request and then go to the Affiliations tab. A list of affiliated Contacts is displayed:

Using these filters, you can limit the list of Contacts by their Affiliation Role, and/or by specifying that Contacts affiliated only with the Organization (shown here), only with the Organization's Requests, or both are shown. For more information, please see "Organization Affiliations" on page 194.

From the Affiliations tab, you can click Edit Contact to edit the Contact.

Searching for Contacts

You can search the Contacts folder using any of the search techniques described in "Searching for Data in GIFTS" on page 77. This section details each of the Quick Find search properties for Contacts.

You can search on any combination of the following properties:

Property	Description
Coding Sheet	Search the Contacts Coding Sheets. When you click this property, the Coding Sheet template for Contacts is displayed, and you can choose any combination of codes on the template. Note that Essential GIFTS does not have Coding Sheets for Contacts.
Contact ID	The ID number of the contact. GIFTS assigns ID numbers to each contact entered; these are sometimes included in reports and queries for easy reference.
Contact is a Donor	Searches for Contacts that are Donors.
Contacts with Alerts	Searches for Contacts that have an alert posted.

Property	Description
Contacts unaffiliated with Requests	Searches for Contacts that are not affiliated with any Requests.
City	The city in the Contact's primary mailing address.
Discipline	Disciplines which the Contact has studied.
First Name	The first name of the Contact.
Last Name	The last name of the Contact.
Mailing List	A Mailing List to which Contacts have been assigned.
Occupation	The Contact's occupation.
Primary Organization Name	The name of the Contact's Primary Organization. Each contact has only one Primary Organization, which is usually his or her employer.
Role	The role of the Contact's Affiliations. This field searches through the Contact's Affiliations to see if they have ever served that role.
Social Security No.	The social security number of the Contact. Be sure to enter the dashes to match the format of the Social Security Numbers in your system.
State / County / Province	The state, county, or province in the Contact's Primary Address.
Type	The Contact's general role within the grant making process, such as "Arts Professional" or "Non-profit Employee." (Note that each Affiliation created for a Contact has a *role* that identifies the nature of that specific Affiliation—their Contact Type is more general.)

The Contacts Folder

The Contacts folder displays information after you have successfully searched for a Contact, or if you have zoomed in on a record in another

folder and then switched to the Contacts folder. The following is an example of the Contacts folder display.

By default, Contacts are displayed alphabetically by last name. You can customize the format and content of the information in the Organizer, as described in "Working with the Organizer" on page 37. The following default information is displayed in the Contacts folder:

Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the Contact. Double click on the mark to view the alert.
Name/Phone/Type	The Contact's full name and Office Phone Number, and the Contact Type code that describes their general relationship to the grant making process.
Primary Mailing Address	The complete Primary Address of the Contact. (During data entry, you can specify whether the Contact's Office, Home, or Alternate address is to be used as their Primary Address.)
Organization/Title/ Role	The name of the Contact's Primary Organization, the Contact's Title at that Organization, and their Role at that Organization. For information about editing a Contact's Primary Organization, please refer to "Primary Organization Affiliation" on page 356.
Source/Discipline/ Notes	The staff identified as the source of the Contact's Mailing List information, the Disciplines specified in the Contact's educational background, and the Contact Notes.
ID	The unique, system-defined identification number assigned to the Contact.

Column	Description
Audit	The dates on which the record was created and last modified, and the Login IDs of the users that created and last modified the record.

Adding and Modifying Contacts

Many users create Contacts as they add Organizations and Requests to the system. However, detailed information—including the Contact's Home and Alternate Addresses, their biographical and educational experience data, and so forth—can only be entered directly through their Contact record.

To add a new Contact:

- Go to the Contacts folder and click the New button on the Folder toolbar.

- Click the New Contact button on the Main toolbar.
- Choose File ➤ New ➤ Contact from the Main menu.

To modify an existing Contact, select it in the Contacts folder and Choose File ➤ Open from the Main menu.

The Contact record is displayed.

You can click on the Contact's e-mail address to send an e-mail message.

The Contact information is organized onto several tabs:

Tab	Description
Page 1	The Contact's name and his or her Primary Organization Affiliation. The Primary Organization is the Organization with which the Contact is most closely related, and is usually his or her employer. The Title, Role, and Notes fields detail this primary relationship.
Page 2	Biographical information, Mailing List information, and the different Salutations for the Contact.
Address	Each Contact may have up to three addresses: Office, Home, and an Alternate address. Telephone numbers, which are specific for each address, are also located here.
Education	Information about the Contact's education, including institutions attended and degrees earned.
Coding	The classifications available in the Contacts Coding Sheet are defined by your Administrator.
Affiliations	The Contact's Affiliations.

Page 1

This tab contains the Contact's name, their Contact Type, e-mail address, and their Primary Organization Affiliation.

Click here to search for the Organization record of the new Contact's Primary Organization.

If your Administrator has configured the system to search for duplicate Contacts, it automatically searches the database for a name starting with the name entered in the Name field to help ensure that you do not create duplicate records:

- If no match is found, the cursor will move to the next field, and you can continue entering the new record.
- If a match is found, GIFTS displays a list of the Contacts that met the search criteria:

Review the list of records and determine if the Contact you are entering is already in the system. If so, just double-click on the appropriate record to load the existing record into the data entry window.

If none of the records found is a duplicate record, click Cancel and continue entering the new record.

Basic Contact Information

The following fields are available on Page 1 to track basic Contact information.

Field	Description
Last Name	The last name of the Contact. Be sure to enter the name as you would like it to appear in your reports and correspondence.
First Name	The Contact's first name.
Middle	The Contact's middle name or initial.
Prefix	The Contact's prefix. You can select "Mr.," "Ms.," and various other professional and clerical titles from the list.

Field	Description
Suffix	The Contact's suffix, if any, such as "Ph.D." or "Jr." Choose from the items in the list.
Type	A list of available Contact Types, as defined by your Administrator. The Type applies to the Contact's *general* relationship to the grant making process, such as "Arts Professional" or "Non-profit Employee." (Note that each Affiliation created for a Contact has a *role* that identifies the nature of that specific Affiliation—their Contact Type is more general.)
E-mail	The Contact's e-mail address. If the e-mail address is displayed in blue, it is a "hot link": to send an e-mail message, click on it and send a message as described in "Sending E-mail Messages" on page 465. To edit the e-mail address, click on the blank area to the right of the e-mail address and use the left arrow to move the cursor to the area that you want to edit.

Primary Organization Affiliation

In general, the Contacts with whom you work are employed by or primarily affiliated with an Organization in your database. Some Contacts may be affiliated with several Organizations, but only one is considered their Primary Organization.

For instance, assume that James Tamus is the President of New University. Although he also contributes to projects with State University and Advancements in Education, the bulk of his contact with you is related to New University. Thus, you would enter New University as his Primary Organization.

If an Organization or a Request is currently zoomed in the Organizer when you create a Contact, the system enters the zoomed Organization as the Primary Organization. To enter or change the Primary Organization for a

Contact, click the Find button in the Primary Organization Affiliation area. The Organization Search window is displayed.

If you cannot find the Organization in your database, you can click New to create a new Organization.

Note: The Organization record that is displayed includes only the Organization and Tax Status pages. You can add more information later as you would with any Organization.

The following fields are available to describe the Primary Organization Affiliation. (With the exception of the Title field, you can also edit this information by opening the Affiliation from the Organization record.):

Field	Description
Title	The title of the Contact at his or her Primary Organization.
Role	The role of the Contact at his or her Primary Organization. This is specific to this particular Affiliation, and does not apply to their relationship to the grant making process as a whole (which can be described by their Contact Type).
Notes	Notes regarding the relationship of this Contact to his or her Primary Organization.

Clearing the Primary Organization Affiliation

To clear the Primary Affiliation, double-click on the Primary Organization Affiliation area. You are prompted to confirm that you want to clear the Organization. Click Yes. Note that this deletes the Primary Organization Affiliation between the Contact and the Organization, but does not delete either the Organization or the Contact.

Page 2

This tab contains biographical and other related information about the Contact. It also includes the Mailing Lists that can be used to generate Batch Correspondence. Note that all of the information on this tab is optional.

Biographical Information and Notes

Field	Description
Occupation	The Contact's occupation (in general). Choose a classification from the list defined for this field.
Social Security No.	The Contact's Social Security Number.
Date of Birth	The Contact's date of birth.
Spouse Name	The name of the Contact's spouse, if applicable.
Citizenship	The country of citizenship for the Contact. Enter the country, or choose from the list of countries on file.
Notes	Any general notes related to the Contact. This field has a limit of 255 characters.

Mailing List Information

The Mailing List information can be used to create Batch Correspondence, and to run the Standard Reports that create labels for these mailings. In the Source/Ref field, choose the member of your staff responsible for your Mailing Lists. Then, use the Assign and Remove buttons to determine to which of your Mailing Lists this Contact belongs:

- Click Assign to add the Contact to a Mailing List. A listing of the available Mailing Lists is displayed. You can highlight each of the appropriate Mailing Lists and then click Done to save your selections.
- To remove the contact from a Mailing List, highlight it and then click Remove.
- To assign additional Mailing Lists to the Contact, you can click Assign, highlight the appropriate lists, and click Done. Please note that all of the Mailing Lists for the Contact should be highlighted, even if they were already specified before you clicked Assign.

Note: The available Mailing Lists are defined by your GIFTS Administrator. If you need to create new lists, please ask your Administrator to add them to the Mailing List Code Table.

Tip: You can also assign and unassign Mailing Lists to a batch of Contacts. For more information, please see "Assigning Mailing Lists to a Batch of Contacts" on page 367.

Salutation Information

The Salutation fields include information about how this Contact should be addressed formally, informally, and as an addressee. The format of each salutation type is defined by your Administrator. If the Salutation displayed is not appropriate, you can edit it.

Address and Telephone Information

You can store up to three different addresses for each contact, and decide which of the addresses should be used as the primary mailing address (the default address for correspondence). Each address also includes telephone numbers.

The address flagged as the Primary Address is used for GIFTS correspondence.

If you want to make a different address the Primary Mailing Address, select this check box on the other address tab.

To enter address information:

- Click on the vertical tabs to choose the address you wish to enter—Office, Home, or Alternate.
- If you wish the address you are working with to be the Primary Mailing address, click Use as Primary Mailing Address. An aqua dot is displayed on the tab for the Primary Mailing Address.

Note: If you select the Contact's Home or Alternate Address as the Primary Address, no Title or Organization information is included in the Contact's Address Block when you create correspondence.

If the Contact is also tracked as an Organization, you can use the 'Omit Organization Name from Label' option to omit their Organization Name from the 'Mailing Label' merge field used in correspondence.

Use the following fields to track the Contact's address information.

Field	Description
Address	The street address. To avoid formatting problems in your correspondence for addresses outside the U.S. or Canada, enter the *entire* address—except Country—into this block. Your Administrator should set the General Preference option to ignore City, State/Province/County, and Postal Code information for addresses outside of the U.S. and Canada; if so, the addressee information in your correspondence skips the City, State/Province/County, and Postal Code fields and places the country on the following line. Note that this option affects your correspondence only, and does not affect the GIFTS Report Library (including the mailing list reports).
City	The city. For addresses outside of the U.S. and Canada, you can skip this field unless you wish to be able to report or search on the City field.
State / Province / County	The state, province, or county. For addresses outside of the U.S. and Canada, you can skip this field unless you wish to be able to report or search on the State / Province / County field. *The maximum number of characters for this field is 20.*
Postal Code	The postal (or Zip) code. For addresses outside of the U.S. and Canada, you can skip this field unless you wish to be able to report or search on the Postal Code field. If your Administrator enabled the postal code data entry shortcut, you can skip the City, State, and Country when you create or edit an address. Enter the Postal Code and click any field. GIFTS fills in the City and State for you. If these fields are not filled automatically, the shortcut is not enabled or the Postal Code you entered is not on file.
Country	Type the country, or choose one from the available list. The system uses this field to determine whether the address is outside of the U.S. or Canada.
Description	Available for Alternate addresses only. This field allows you to enter a description of the Alternate Address, such as "Summer Home." The description of the Alternate Address entered here is displayed at the top of the Address area.

For each of the addresses you enter, you can specify the following telephone information.

Field	Description
Main	The main telephone number and extension. Enter the number as you want it to appear in reports or queries. For instance, "(919) 834-1212" or "919/834-1212." If your Administrator specified a default telephone number format, you can type the number with no parentheses, spaces, or dashes. GIFTS formats the number for you. If your Administrator defined a default area code and you type a telephone number with no area code, GIFTS adds the default area code.
Secondary	The secondary telephone number and extension. You can enter a description of this number to the left of the number fields, if desired.
Fax	The Contact's fax number at this address.
Last Updated	Displays the date of the last update to this address and the Login ID of the user who updated it. This information can help you keep your mailing lists up-to-date.
Mobile	The Contact's mobile phone number, if available.
Pager	The Contact's pager number, if available.

Education

This tab allows you to record information about a Contact's educational experience, including the highest degree awarded, the school attended, and the disciplines studied.

Field	Description
Degree Awarded	The highest degree awarded to the Contact.
Year Awarded	The year in which the above degree was awarded.
School/Institution	The school that awarded the degree. Depending upon an option chosen by your Administrator in the General Preferences, this is either text field—where you can type in the name of the school—or a link to an Organization record. If this field is a link to an Organization, you can click the Find button to choose an Organization from the Organizations folder or to create a new Organization.

Field	Description
Discipline (s)	The disciplines studied by the Contact: ❖ Click Assign to add a discipline. You can highlight each of the appropriate disciplines and then click Done to save your selections. ❖ To remove a discipline, highlight it and click Remove. ❖ To assign additional disciplines to the Contact, you can click Assign, highlight the appropriate disciplines, and click Done. Please note that all of the disciplines for the Contact should be highlighted, even if they were already specified before you clicked Assign.

Contact Coding Sheet

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Contacts that allows you to choose classifications from a set of categories defined by your GIFTS Administrator. These classifications are displayed on the Coding tab of your Contact records.

Tip: Contact Coding Sheets are optional. In the Contact records, GIFTS can track mailing lists, biographical, and education information. If these

classifications are sufficient for your needs, it is not necessary to use a Contact Coding Sheet.

Note: Essential GIFTS does not utilize Organization Coding Sheets.

If your Administrator specified any categories on the Contact Coding Sheet as *required*, you cannot save a new Contact record until you have provided a code in that category. This section includes basic information about entering Coding Sheet data. For more comprehensive information, please refer to "Working with Coding Sheets" on page 29.

Tip: "Working with Coding Sheets" on page 29 includes time-saving data entry tips that can greatly ease the coding process.

Adding Codes To classify the Contact, highlight the category in which you wish to supply a code and click Add. The codes defined for that category are displayed.

Use these buttons to collapse and expand the code levels.

You can also click on the folders to collapse and expand the levels.

To search for a code, enter the first several letters of its name here and press ENTER or TAB. GIFTS searches both the Description value and Code value of your codes.

To add a code, highlight it and click Insert. The code is displayed on the Coding Sheet. When you are finished adding codes, choose File ➤ Close from the Code Selection menu.

Primary and Secondary Codes Some categories allow you to select more than one code. If more than one code is specified for a category, the *primary code* is displayed in blue, and the *secondary codes* are displayed in green.

For an explanation of how primary and secondary codes are used in GIFTS reports and correspondence, please refer to "Primary and Secondary Codes"

on page 34. To make a secondary code the primary code within a category, highlight it and click the Primary button at the bottom of the Coding Sheet.

Removing Codes To remove a code, highlight it and click Remove.

When the Coding Sheet information is complete, you can click on the other Contact tabs to work with or view other information—the Coding Sheet is saved automatically. If you are finished working with this Contact, click Save and Close to save the Contact and return to the GIFTS Organizer.

Contact Affiliations

The Affiliations tab of a Contact displays each of the Contact's Affiliations with the Requests and Organizations in your system. Note that several records may be displayed for a given Request or Organization, since the Contact can be affiliated with a single record more than once in order to describe each of her various roles in regard to the Request or Organization.

Using these filters, you can limit the list of Affiliations by the Affiliation Role played by the Contact, and/or by specifying that instances where the Contact is affiliated only with Organizations, only with Requests, or both are shown. For more information, please see "Accessing Affiliations in Contact Records" on page 382.

Column	Description
Organization	For Organization Affiliations, the Organization name and address appears here. For Request Affiliations, this column contains the grantee Organization's name and address.

Column	Description
Request	For Request Affiliations, this column lists the Request's ID, Reference Number, Disposition, Disposition Date, and Project Title. Otherwise blank.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).
Notes	Any notes entered in the Affiliation record.
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Note that you cannot add or modify Affiliations from this window; affiliations are managed from within the Organization or Request to which they apply. For more information, please refer to "Working with Affiliations" on page 375.

Assigning Mailing Lists to a Batch of Contacts

Mailing Lists can be assigned (and unassigned) to a batch of Contacts in the GIFTS Organizer.

1. In the Contacts folder grid, highlight the Contacts to whom you want to assign or unassign Mailing Lists.

   Note: You needn't worry about whether selected Contacts have already been added or removed from a particular Mailing List. If a Contact in your batch of highlighted records is already assigned to the Mailing List you are adding, that Contact won't change. If you are unassigning a Mailing List, Contacts already removed from that list will also be unchanged.

2 From the main menu, select Action ➤ Assign/Unassign Mailing Lists. The Assign/Unassign Mailing Lists windows opens:

3 Choose the Assign or the Unassign radio button, based on which action you want to take, and then highlight the Mailing Lists you are adding or removing.

4 Click OK. A message asks you to confirm your action. Click Yes to continue. A process log appears, recapping your Mailing List action:

Using Contact Alerts

An alert is a way of marking and annotating a Contact so that you can remind yourself or your colleagues of something important regarding the Contact. Exactly how Contact Alerts are used is up to you.

On Request records, users can click the alert icon beside the Contact's name to view the alert.

You can choose whether you want the Alert Message to display when users open the Contact record and its associated Requests. For example:

Posting an Alert

To post an alert:

1 Search for and open the Contact's record.

2 From the Contact menu, choose Action ➤ Alert.

Field	Description
Message	The alert text. If this field is left blank, no alert is posted.
Display Alert Message?	Enable this option to display the Alert Message each time a user opens the Contact record. Otherwise, users can click the alert button to view the message.

3 Click OK to save the alert and return to the Contact record.

Removing an Alert Message

To remove an alert, open the Alert window, delete the message text, and click OK. Then, save the Contact. GIFTS cancels the alert.

Deleting Contacts

You can delete a Contact at any time; all of the Affiliations that the Contact has to Requests and Organizations are deleted as well.

Caution: When you delete a Contact, all references to that person are removed. To maintain your historical data regarding a Contact, you must leave their record in the database.

To delete a Contact:

1. Search for and open the Contact's record.
2. From the Contact menu, choose File ➤ Delete. You are prompted to confirm that you wish to delete the Contact.
3. Click Yes to delete the contact, or No to abandon the deletion.

Exporting Contacts to Outlook

If you maintain contact information for the people with whom you work in both GIFTS and Microsoft Outlook, this GIFTS-to-Outlook export feature will help consolidate that data.

To Export GIFTS Contacts to Outlook:

1. Display the Contacts you want to export in the Organizer grid. If you are exporting only some of the displayed records, highlight them now.

2 Select File ➤ Export ➤ Outlook from the main menu. The Export to Outlook window opens:

3 Set up your Outlook export options. First, determine which records you want to export:

Select the 'Export all records' radio button to export all the Contacts currently displayed in the Organizer. Select 'Export only selected records' to export the Contacts currently highlighted.

4 Next, you should determine how you want to treat Contacts that have been exported to Outlook before:

The current method selected for dealing with duplicates is shown here.

Note: Contacts are considered duplicates when all of the following three fields match exactly: first name, last name, and e-mail address.

Click Preferences to change your method of dealing with duplicate records:

- If you choose 'Overwrite duplicates with updated information,' duplicate records will be checked for changes and updated.

  For example, if you are re-exporting contact information for Margaret Neff, and her phone number has been changed in GIFTS recently, the export will change the phone number in the Outlook Contact record.

- Choosing 'Allow duplicates to be created' is useful if some of your contacts are associated with more than one Organization, address, or phone number. Be aware, however, that your Outlook Contact folder(s) can become filled quickly with redundant information if you leave GIFTS set to this option.

- Choose 'Do not export duplicate items' to stop the export of any duplicate Contacts.

Click OK to close the window.

5 Select the folder in Outlook to which you want your GIFTS Contacts exported:

The folder you used the last time you exported Contacts will be displayed. (If you have not used the export feature before, the primary Outlook Contacts folder will be displayed.) If you want to choose another folder as your export destination, click Select Contact Folder.

Note: You must select the correct type of Outlook folder as the destination. If you choose an Outlook folder that is not designed for Contacts, you will receive an error message and be asked to select a different folder.

6 Once you have selected your export options, click Export to send the GIFTS Contacts to Outlook.

GIFTS Contacts in Outlook

When you export Contacts to Outlook, you should be aware of how Contact data fields in GIFTS correspond to those in Outlook. Below is a sample Contact as it appears in Outlook:

Outlook Contact Field	GIFTS Data Source
Full Name	From the Contact record: Prefix, First Name, Last Name
Job Title	Contact Title
Company	Contact's Primary Organization

Outlook Contact Field	GIFTS Data Source
Business (phone number)	Main phone number in the Contact record's 'Office' address tab
Home (phone number)	Main phone number in the Contact record's 'Home' address tab
Business Fax	Fax number in the Contact record's 'Office' address tab
Address	Contact addresses In the Address section of the Outlook contact record, you can click the down arrow icon to choose one of three types of addresses: Business, Home, or Other. These correspond respectively to the Office, Home, and Alternate addresses in the GIFTS Contact record.

Other details from the GIFTS Contact record appear in the body of the Outlook contact.

Tip: Once GIFTS Contacts have been exported to Outlook, you can edit them like other Outlook Contacts. Please note, however, that you cannot export updated information from Outlook back to GIFTS.

14 Working with Affiliations

Affiliations link Contacts to the Organizations with or for whom they work, and with Requests that they manage or oversee. Understanding Affiliations and using them properly is key to good Contact management in GIFTS.

Note: The Contact tracking features are not available to Essential GIFTS clients who do not have the Contact Manager option.

In This Chapter

About Affiliations **376**

Primary and Secondary Affiliations **379**

Accessing Affiliations **381**

Searching for Affiliations **386**

The Affiliations Folder **388**

Creating and Modifying Affiliations **390**

Correspondence for Contacts and Affiliations **397**

Managing Affiliations When Relationships End **400**

About Affiliations

Affiliations are at the heart of Contact management in GIFTS. They are also one of the most misunderstood parts of GIFTS.

The topics in this section try to answer some of the questions users often have about these essential but sometimes confusing GIFTS records: What are Affiliations? What purpose do they serve? What kinds of Affiliations are there, and how can I use them to the fullest advantage?

What Is an Affiliation?

An Affiliation is a GIFTS record noting a particular relationship between a Contact and an Organization or a Request.

For example, when you make someone the Primary Contact for an Organization, a GIFTS Affiliation record is created noting this relationship. It contains information about the Contact, the Organization, and the nature of the relationship:

Details about George Notingham's relationship to the Teen Aid Center are recorded here.

This is an example of a *primary* Affiliation. Primary and secondary Affiliations are described later in this section.

The following is an example of a secondary Affiliation. Request ID 508 has a Request Type of Dinners and Events—it is a grant to fund the Annual NYC Performing Arts Banquet. One Contact, Margaret Neff, attended the dinner. The following Affiliation was created to record this:

The Role field notes the nature of the Contact's relationship to the affiliated Request. Several common Roles are provided with GIFTS; your GIFTS administrator can add others if you need them.

In both cases above, the Affiliation record does not only link the Contact with the Organization or Request, it also defines the role the Contact plays or played:

The different Roles that can be specified in an Affiliation begin to point to the purpose of having Affiliations in the first place.

Why Have Affiliations?

Records in GIFTS are linked to other records in a number of ways. For example, a Payment is linked to the approved Request from which the paid amount comes. In this and most other cases, however, no third record is created to note this relationship.

Why then is a third record—an Affiliation—created to link a Contact to an Organization or a Request?

A Payment can play only a single "role" for its Request—you don't need another record detailing this relationship. On the other hand, a single Contact—one person—may play any number of different roles within one or more Organizations, or have a part in any number of different Requests. Each Affiliation record links the Contact to an Organization or Request, while at the same time noting the specific relationship between the two.

This allows you to maintain one Contact record per person, while also allowing you to link that person to any number of different Organizations or Requests.

Example: Selena Pelletier currently has the following links to different Organizations and Requests tracked in your GIFTS system:

- She is the Primary Contact for the Charitable Trust of Penobscot.
- She is an employee of the Charitable Trust of Penobscot.
- She is the Primary Contact for two Requests submitted by the Charitable Trust of Penobscot.
- In addition, she also serves as a consultant for another Organization, the Eastern Maine Foundation.

Affiliation records not only link Selena Pelletier's Contact record to each of these Organizations and Requests, they describe each relationship as well:

Five relationships—five Affiliation records. And because each relationship is noted in its own record, you can add Affiliations to note new ones, or close an Affiliation when a particular relationship ends.

About Affiliation Terms

Each Affiliation record includes From and To dates, noting the beginning and ending dates of the relationship it records.

Affiliations are considered "active" if their To date fields are either blank or contain a date in the future (assuming the From date itself is not in the future).

When the To date passes (or a past date is added), the Affiliation is "closed." Closed Affiliations are saved in your GIFTS system, but can be filtered out of Affiliations lists in many places in GIFTS. For example, in the Affiliations tab of Contact records, you can clear the "Include Closed Affiliations" check box to see the Contact's active Affiliations only (see "Accessing Affiliations in Contact Records" on page 382 for details.)

Primary and Secondary Affiliations

As noted above, there are two types of Affiliations: primary and secondary. Although in both cases the Affiliation records contain the same fields and data, primary and secondary Affiliations note different kinds of relationships and are created, modified, and handled differently.

All Affiliations are accessed, searched for, and displayed in the Organizer in the same way. Primary and secondary Affiliations are created and modified differently, however, as described in "Creating and Modifying Affiliations" on page 390.

About Primary Affiliations

Each Primary Affiliation notes a unique relationship between a Contact and an Organization or between a Contact and a Request. There are three kinds of primary Affiliations:

Primary Affiliation	Description
Organization Primary Contact Affiliation	When a Contact is designated the Primary Contact for an Organization, the relationship is noted with this kind of Affiliation.
Contact Primary Organization Affiliation	In the Contact record, the person's Primary Organization can be designated. (This is usually the contact's employer.) An Affiliation of this kind notes the relationship.
Request Primary Contact Affiliation	When a Contact is designated the Primary Contact for a Request, the relationship is noted with this kind of Affiliation.

Each is unique in the following sense:

Primary Affiliation	Unique because...
Organization Primary Contact Affiliation	Each Organization can have only one Primary Contact. NOTE: A Contact *could* be the Primary Contact for more than one Organization.
Contact Primary Organization Affiliation	Each Contact can have only one Primary Organization. NOTE: An Organization could—and often will—be designated the Primary Organization for many Contacts (that is, its employees).
Request Primary Contact Affiliation	Each Request can have only one Primary Contact.

Primary Affiliation records are created automatically by GIFTS when you add or change an Organization or Requests's Primary Contact, or when you add or change a Contact's Primary Organization. Although the Affiliation records themselves can be opened and edited, it is not necessary for many primary Affiliation tasks. For details, please see "Creating and Modifying Affiliations" on page 390.

About Secondary Affiliations

Users create secondary Affiliations manually to note any number of different kinds of non-primary relationships between Contacts and Organizations or Requests. If a primary Affiliation does not already cover the link between the Contact and an Organization or a Request, you can create a secondary Affiliation that does. This is where the flexibility of Affiliations becomes most apparent.

For example, a particular Request may already have a Primary Contact—and this relationship is noted by an automatically-created primary Affiliation. If you want, you can also create a secondary Affiliation to specify someone the alternate contact for the Request. In fact, you could designate several alternate contacts for a given Request, by adding a secondary Affiliation for each Contact.

In another case, you have recorded contact information for an individual who provides technical advice to several Organizations. To track this individual's relationship to each Organization he or she assists, you can create a secondary Affiliation with a Role of Technical Advisor for each Organization.

For information on adding secondary Affiliations, please see "Creating and Modifying Affiliations" on page 390.

Accessing Affiliations

There are two ways in which you can access Affiliations:

- From the Affiliations folder of the Organizer.
- From the Affiliations tab of a Contact, Organization, or Request record.

Accessing Affiliations in the Organizer

To view Affiliations in the Affiliations folder, you can:

- Use the Quick Find search options for the Affiliations folder, as described in "Searching for Affiliations" on page 386.
- Zoom on the Contact, Request, Organization, or Document Activity you want to focus on, then switch to the Affiliations folder. It is now populated with Affiliations associated with that item.

  Note: Document Activity records can be displayed in both the Activities and Documents folder of the Organizer. The only Document Activities with associated Affiliations are those recording correspondence generated *for* Affiliations.

To view the Affiliation record, highlight the record in the Organizer grid and select File ➤ Open.

Accessing Affiliations in Contact Records

The Affiliations tab of a Contact can display all primary and secondary Affiliations associated with the Contact:

Above the Affiliations grid are three filters you can use to narrow the list of displayed records.

Since Contacts over time can accumulate a lot of Affiliations, this will help you find the one you want.

The filters are described below.

Note: You cannot add, open, or edit an Affiliation from within a Contact record. This tab is used to display a list of the Contact's Affiliations.

The columns in the Affiliations tab of a Contact display the following data:

Column	Description
Organization	For Organization Affiliations, the Organization name and address appears here. For Request Affiliations, this column contains the grantee Organization's name and address.
Request	For Request Affiliations, this column lists the Request's ID, Reference Number, Disposition, Disposition Date, and Project Title. Otherwise blank.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).
Notes	Any notes entered in the Affiliation record.
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Filtering Affiliation Records You may find it easier to find the Affiliation(s) you are looking for using one or more of the filtering options above the grid:

Filter	Description
Role	Select from a list of Affiliation Roles to see only those Affiliations in which the Contact took that role.
Type	Limit the list to Organization Affiliations or Request Affiliations only. Select <All> to see both types of Affiliations.
Include Closed Affiliations	Select this check box to include the Contact's closed Affiliations in the list. Clear the check box to see only active Affiliations.

Accessing Affiliations in Organization Records

In Organization records, the Affiliations tab displays all primary and secondary Affiliations associated with 1) the Organization and 2) Requests associated with the Organization:

Click Edit Affiliation to open and edit the selected Affiliation record.

You can also click Add Affiliation to add a secondary Affiliation, or Edit Contact to edit the Contact referred to in the selected Affiliation.

The columns in the Affiliations tab of an Organization display the following data:

Column	Description
Contact	Lists the affiliated Contact's name, Affiliation Title, and Affiliation Address.
Request	For Request Affiliations, this column lists the Request's ID, Reference Number, Disposition, Disposition Date, and Project Title. Otherwise blank.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).
Notes	Any notes entered in the Affiliation record.
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Filtering Affiliation Records As in the Affiliations tab of Contact records, filtering options are available above the grid:

Filter	Description
Role	Select from a list of Affiliation Roles to see only those Affiliations in which the affiliated Contact took that role.
Type	Limit the list to Organization Affiliations or Request Affiliations only. (Request Affiliations in this case would be all Affiliations for all Requests associated with the Organization.) Select <All> to see both types of Affiliations.
Include Closed Affiliations	Select this check box to include closed Affiliations in the list. Clear the check box to see only active Affiliations.

Accessing Affiliations in Request Records

In Request records, the Affiliations tab displays all primary and secondary Affiliations associated with the Request:

Click Edit Affiliation to open and edit the selected Affiliation record.

You can also click New Affiliation to add a secondary Affiliation, or Edit Contact to edit the Contact referred to in the selected Affiliation.

The columns in the Affiliations tab of a Request display the following data:

Column	Description
Contact	Lists the affiliated Contact's name, Affiliation Title, and Affiliation Address.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).
Notes	Any notes entered in the Affiliation record.
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Filtering Affiliation Records The following filtering options are available above the grid in the Request Affiliations tab:

Filter	Description
Role	Select from a list of Affiliation Roles to see only those Affiliations in which the affiliated Contact took that role.
Include Closed Affiliations	Select this check box to include closed Affiliations in the list. Clear the check box to see only active Affiliations.

Note: The Affiliations tab in a Request record does not display any Organization Affiliations, so the Type filter is not included here.

Searching for Affiliations

You can search for Affiliations in the Affiliations folder of the Organizer using any of the techniques described in "Searching for Data in GIFTS" on

page 77. This section details each of the Quick Find search properties for Affiliations.

You can search on any combination of the following criteria:

Property	Description
City	The city in the Affiliation address.
Contact's Coding Sheet	When you click this property, the Coding Sheet template for Contacts is displayed. You can choose any combination of codes on the template. Only Affiliations for Contacts with matching Coding Sheets are returned.
Contact's First Name	The first name of the Contact(s) whose Affiliations you want to find.
Contact's Last Name	The last name of the Contact(s) whose Affiliations you want to find.
Contact's Type	The type of the Contact(s) whose Affiliations you want to find. Contact Type describes the person's general role in the grant-making process, such as "Arts Professional" or "Non-profit Employee." Please note that this is not (and need not) be the same as the Contact Role assigned in each Affiliation.
Country	The country in the Affiliation address.

Property	Description
From Date	The date on which the Affiliation began.
Notes	Select this property and enter text to search on. Only Affiliations with matching text in their Notes fields are returned.
Organization's Name	The name of the Organization whose Affiliations you want to find.
Request Affiliation	Indicates that you want to limit search results to Request Affiliations only or Organization Affiliations only. Click the property and select Yes if you want only Request Affiliations returned; select No if you want search results limited to Organization Affiliations only. Don't use this property if you want to see both kinds of Affiliations.
Request's Disposition	The Disposition of the Request(s) whose Affiliations you want to find.
Request's ID	The ID of the Request whose Affiliations you want to find.
Request's Project Title	The Project Title of the Request whose Affiliations you want to find.
Request's Reference Number	The Reference Number of the Request whose Affiliations you want to find.
Request's Type/Status	The Type and/or Status of the Request(s) whose Affiliations you want to find.
Role	The Role for the Affiliation.
State	The state in the Affiliation address.
Title	The Title for the Affiliation.
To Date	The date on which the Affiliation ended or will end.

The Affiliations Folder

The Affiliations folder in the Organizer displays information after you have successfully searched for Affiliations, or once you have zoomed on a record

in another folder and switched to the Affiliations folder. The following is an example of the Affiliations folder display:

A record displayed in black font is an Affiliation between a Contact and an Organization; one whose first column is displayed in blue font is between a Contact and a Request.

By default, Affiliations are displayed alphabetically by Contact Last Name, then Contact First Name, then Affiliation Role. For example, all Affiliations for Margaret Neff, since they share the same Contact Last and First Names, will be listed together alphabetically by Affiliation Role.

You can customize the format and content of the information in the Organizer, as described in "Working with the Organizer" on page 37. The following information is displayed in the Affiliations folder by default:

Column	Description
Locked Status	A padlock is displayed if the Affiliation has been locked. If the lock is green, you can edit the Affiliation. If it is read, you cannot.
Contact	The Contact's full name, followed by the address, telephone number, and e-mail address from the Affiliation record.

Column	Description
Organization	The Name and Address of the affiliated Organization (if this is an Organization Affiliation) or the affiliated Request's Organization (if this is a Request Affiliation).
Request	The Request ID and Reference Number, Disposition, Disposition Date, and Project Title, if this is a Request Affiliation. Otherwise blank.
Affiliation	The Affiliation Role, followed by the Affiliation term (i.e., the From and To dates).
Notes	Any notes recorded in the Affiliation record.
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Creating and Modifying Affiliations

Primary and secondary Affiliations serve different purposes, and so are created and modified in different ways.

Creating Primary Affiliations

The three types of Primary Affiliations, described in "About Primary Affiliations" on page 380, represent unique relationships between Contacts and Organizations or Requests. For example, a Contact can have only one Primary Organization; a Request can have only one Primary Contact.

Because these primary Affiliations are so important to your GIFTS workflow, they are created within the Contact, Request, or Organization records themselves. You do not need to open an Affiliation record and fill it out; the Affiliation records are created by actions taken in the main records themselves:

❖ Organization Primary Contact Affiliations are created when you add or change the Primary Contact in the Organization record, as described in "Entering an Organization Primary Contact" on page 183:

The Primary Contact information is displayed on the Organization tab.

Telephone number, fax number, and e-mail address come from the person's Contact record. Title and Relationship Notes, however, are from the Organization Primary Contact Affiliation record. These fields can be edited here in the Organization record; changes are saved to the Title and Notes fields of the Affiliation record—*not* the Contact record—when the Organization record is saved.

As a result of this action, GIFTS automatically creates an Organization Primary Contact Affiliation record noting this new relationship.

Note: If you are changing the Primary Contact (rather than adding it for the first time), the Affiliation record noting the *previous* Primary Contact is automatically closed by GIFTS. That is, the current date is saved in the To date field of that Affiliation, recording the end of the relationship between Organization and Contact.

❖ Request Primary Contact Affiliations are created when you add a Request, or change the Primary Contact in an existing Request, as described in "Changing the Request Primary Contact" on page 216. One is also created when you change the Request's Organization. (Even if the Primary

Contact is still the same, the Contact's previous Affiliation is closed a new one created.)

Information about the Request Primary Contact is displayed on Page 1 of the Request. Title and telephone number in this case come from the person's Contact record, *not* the Request Primary Contact Affiliation record.

The Affiliation is created "behind the scenes" when you save the Request with its new Primary Contact.

Note: If you are changing the Primary Contact (rather than adding it for the first time), the Affiliation record noting the *previous* Primary Contact is automatically closed by GIFTS. That is, the current date is saved in the To date field of that Affiliation, recording the end of the relationship between Request and Contact.

❖ Contact Primary Organization Affiliations are created when you add or change the Primary Organization in a Contact record, as described in "Primary Organization Affiliation" on page 356.

Information about the Contact's Primary Organization is shown here.

Note that the Title field in Page 1 of Contacts is the Contact Title, not the Affiliation Title. (This can be confusing, as the opposite is true in Organization records.)

The Role and Notes fields, however, *do* correspond to the Role and Notes fields in the Contact Primary Organization Affiliation record. Data entered or modified here is saved to the Affiliation record.

When you save the Contact, an Affiliation record noting this relationship between the Contact and the Organization is created automatically. The Role of Employee is assigned to this Affiliation, as a Contact's Primary Organization is usually his or her employer.

Note: If you are changing the Primary Organization (rather than adding it for the first time), the Affiliation record noting the *previous* Primary Organization is automatically closed by GIFTS. That is, the current date is saved in the To date field of that Affiliation, recording the end of the relationship between Request and Contact.

Modifying a Primary Affiliation

Affiliation records noting primary relationships *can* be opened and edited manually. However, in many cases you don't need to modify primary Affiliations this way.

Tip: Editing primary Affiliations manually is useful if you want to set the Affiliation term (from and to dates), to add notes about the relationship, or to specify special address or phone number information to be used to contact the person in this role.

Just as you can create primary Affiliations through Contact, Organization, and Request record functionality, you can also make may key primary Affiliations changes the same way.

The table below lists some common primary Affiliation modifications you can make without opening the Affiliation record:

Task	GIFTS Action to Take	For details, please see...
Close an Organization Primary Contact Affiliation	In the Organization record, clear the Primary Contact. The Affiliation noting this relationship will be closed, entering the current date as the To date.	"Clearing the Organization Primary Contact" on page 185
Change an Organization's Primary Contact	In the Organization record, change the Primary Contact. The former Affiliation is closed (i.e., the current date is saved as the To date), and a new one recording the new Primary Contact is created.	"Changing the Organization Primary Contact" on page 185
Close a Request Primary Contact Affiliation	In the Request record, clear the Primary Contact. The Affiliation noting this relationship will be closed, entering the current date as the To date.	"Clearing the Request Primary Contact" on page 217
Change a Request's Primary Contact	In the Request record, change the Primary Contact. The former Affiliation is closed (i.e., the current date is saved as the To date), and a new one recording the new Primary Contact is created.	"Changing the Request Primary Contact" on page 216
Close a Contact Primary Organization Affiliation	In the Contact record, clear the Primary Organization. The Affiliation noting this relationship will be closed, entering the current date as the To date.	"Clearing the Primary Organization Affiliation" on page 357
Change a Contact's Primary Organization	In the Contact record, change the Primary Organization Affiliation. The former Affiliation is closed (i.e., the current date is saved as the To date), and a new one recording the new Primary Contact is created.	"Primary Organization Affiliation" on page 356

As noted above, any primary Affiliation record can be accessed (as described on page 381) and modified manually. For details on modifying Affiliation records, please see "Creating or Modifying Secondary Affiliations" below.

Creating or Modifying Secondary Affiliations

Secondary Affiliations are created by opening and completing an Affiliation record. This can be done one of two ways:

- Open the Request or Organization record with which you want to affiliate a Contact, go to the Affiliations tab, and click New/Add Affiliation.
- In the Organizer, zoom on the Request or Organization record with which you want to affiliate a Contact, go to the Affiliations folder, and select New Record in the Organizer toolbar.

The new Affiliation record opens, with information about the Request or Organization already included. The following is a new secondary Affiliation for an Organization:

If you want to modify an Affiliation, access the record as described in "Accessing Affiliations" on page 381 and open it.

The following fields are available in Affiliations for both Requests and Organizations:

Field	Description
Contact	*Required.* The Contact affiliated with the Request or Organization. Click the Find icon. The Search for Contact window opens, allowing you to find the Contact record. NOTE: When you change the Contact of an existing Affiliation, most other details about the Affiliation do *not* change. Only the Address is changed or cleared. If you want to note that a new person has taken over a certain role, we recommend that you close the existing Affiliation, then add a new Affiliation record for the other Contact. This allows you to track past relationships while keeping current relationships up to date.
Role	*Required.* From the drop-down list, select the Role that defines the Contact's relationship to the Organization or Request—that is, the role the Contact plays in the particular relationship you are recording with this Affiliation. Several default Roles are provided by GIFTS for both Organization and Request Affiliations, like Employee or Event Attendee. Your GIFTS administrator can add other Roles if your organization needs them to track other relationships. NOTE: Even though Primary Contact is available, selecting this Role and saving the Affiliation does *not* make the Contact the Primary Contact. To create a primary Affiliation, see "Creating Primary Affiliations" on page 390.
From	The date on which this relationship began or will begin. When creating a new Affiliation, this field defaults to the current date.
To	The date on which this relationship ended or will end. If you enter a future date, this Affiliation will automatically close on that date.
Notes	Notes about this Affiliation.
Title	The title the Contact assumes in this relationship.

Field	Description
Address	From the drop-down menu, select which address you want to use for this particular Affiliation: ❖ Contact's primary address ❖ Contact's office address ❖ Contact's home address ❖ Contact's alternate address ❖ The affiliated Organization's address If this is an Organization Affiliation, select this option to use that Organization's address. If this is a Request Affiliation, this selection uses the grantee Organization's address. ❖ Other If you select Other, click Edit to open the Address for Affiliation window, then enter the address. Click OK when you are finished. For more information on managing Affiliation addresses, please see "Affiliation Addresses" on page 399.
Phone	The phone number, extension, fax number, and e-mail address for this Affiliation. We recommend you use these only when they are different from the details saved in the affiliated person's Contact record.
Ext	
Fax	
E-mail	

Address and E-mail addresses are used when you generate correspondence for the Affiliation. For more information, please see "Correspondence for Contacts and Affiliations" on page 397.

Correspondence for Contacts and Affiliations

In GIFTS, you can generate correspondence for Contacts or for Affiliations. When you generate correspondence for Affiliations, the results are going to be addressed to the Contacts associated with the Affiliations. So how do you

determine whether to generate correspondence using the Contact records themselves or for the Affiliation records?

There are two reasons you may want to generate correspondence for Affiliations instead of Contacts:

- When generating batch correspondence, you first need to find the right records. In some cases it will prove much easier to find the correct people by actually searching for their Affiliation records, not their Contact records.

  For example, following an annual fund-raising dinner, you want to send letters of thanks to the attendees. If you have created Affiliations with a Role of Attendee linking each attending Contact with the Request for the dinner, you can search for those Affiliations easily and generate batch correspondence for that group of Contacts.

- The second reason has to do with Affiliation addresses and where you want to send the correspondence. Contact records are limited to three addresses: home, office, and alternate. Each Affiliation, however, can have its own address (and its own e-mail address).

  Each Affiliation address or e-mail address is in essence another address for the Contact—it is the specific address of most importance to the role he or she plays in the relationship the Affiliation notes.

  For example, you have a Contact who serves as a consultant to several Organizations. You can create secondary Affiliations linking the Contact to each Organization he or she advises. Each Affiliation can have a different address. Then, if you want to send a letter to the consultant regarding one of these Organizations specifically, you can generate correspondence for the Affiliation (not the Contact)—and the address or e-mail address associated with that relationship will be used.

Affiliation Addresses

As noted in "Creating or Modifying Secondary Affiliations" on page 395, you have the following options when selecting the Address for an Affiliation:

Affiliation Address Option	Description
Contact's primary address	The address (home, office, or alternate) designated in the Contact record as the primary address. If the Contact record is changed to designate a different Contact address as primary, the address of the Affiliation will also change.
Contact's office address	These three options allow you to choose one of the Contact record's three addresses for the Affiliation. If a selected address is edited in the Contact record, it will be changed in the Affiliation as well.
Contact's home address	
Contact's alternate address	
The affiliated Organization's address	If this is an Organization Affiliation, select this option to use that Organization's address. If this is a Request Affiliation, this selection uses the grantee Organization's address.
Other	If you select Other, click Edit to open the Address for Affiliation window, then enter the address.

Which address to choose depends on where you want to send correspondence concerning this relationship.

Example: In an example earlier in the chapter, we looked at a scenario where one Contact was serving as a consultant to a number of Organizations. You can create secondary Affiliations to link the Contact to these Organizations, selecting a Role of Consultant.

Which address to choose for this Affiliation? In this case, you might want to select "the affiliated Organization's address" in the Affiliation record's Address field. Then, when you generate correspondence for the consultant in regard to a particular Organization, you can generate it for the Affiliation that links them. The Organization's address is used in the Affiliation, and can easily be merged into the letter or e-mail.

Example: An upcoming fund-raising dinner is recorded in your GIFTS database as a Request. You are creating secondary Affiliations with a Role of Attendee for Contacts who have been invited.

In this case, you might choose the "Contact's home address" in the Affiliation record's Address field. If you plan to generate correspondence about their attendance at this social event, you might want to lend a personal touch by sending it to their homes. To do so, you can generate correspondence for the Attendee Affiliations, and the home addresses of the Contacts can be used easily.

Managing Affiliations When Relationships End

When relationships end between a person and an organization, either through departure or retirement, you can manage these changes in GIFTS. This section discusses best practices for handling these changes.

Tip: The first rule of thumb: It's almost never a good idea to delete a Contact. You will want to keep a historical record of the Contact's past activity, particularly their affiliation with historical grants. Also, the person may find a new job, or come out of retirement, joining another Organization you track in GIFTS. If you delete the Contact, you will have to

re-enter all the information about him or her. You can deactivate a Contact instead by selecting the Inactive check box on Page 1 of the Contact record:

Remove Contact from Pending Requests and Active Grants

No matter the reason for the contact's departure, you will want to make sure that he or she is no longer the Primary Contact for any pending Request or active grant (approved Request). If your GIFTS system contains other Request statuses that signify an ongoing project, you should replace the Primary Contact there as well.

Tip: You can close all of a Contact's Affiliations in a single batch, as described in "Closing a Batch of Affiliations" on page 404. For open issues like pending Requests and active grants, however, you may want to open each one and specify a new Primary Contact.

In the Request folder of the Organizer, you can use Quick Find to search for pending Requests where the departing person is the Primary Contact:

You can also use Quick Find to find the Contact's Requests with a status of "active grant:"

Tip: Using the Advanced Search capability allows you search for pending Requests, active grants, and other Request statuses in one search. The search

for all pending Requests and active grants where Margaret Neff is the Primary Contact looks like this:

The next steps to follow depend on whether the contact is leaving the organization for another job, or if he or she is retiring.

Closing a Batch of Affiliations

A person who has been tracked is your GIFTS system for a number of years has probably gained a long list of Affiliations. You can easily close all these Affiliations in a single action:

1. In the Contact folder of the GIFTS Organizer, select the person's Contact record, zoom on it, then switch to the Organizer's Affiliations folder. All primary and secondary Affiliations for this Contact are shown:

2. Press CTRL+A to select all Affiliations, or highlight only those you want to close.

3. From the main menu, select Action ➤ Close Affiliations. The Close Affiliations window opens:

4 In the To Date field, enter the date on which the selected Affiliations end, then click OK. A process monitor logs the results of your action:

You can print the results, or save the process monitor. Click Close to close it.

When a Contact Leaves an Organization

When someone resigns from or is terminated by an organization in your GIFTS system, you can reflect these changes in GIFTS:

- If the Contact was the Primary Contact at the Organization, be sure to change the Organization's Primary Contact.
- If you don't know where the person is working after leaving one organization, or if their new employer isn't tracked in your GIFTS database, open the Contact record, clear the Primary Organization, and click Save and Close.
- If the person's new employer is tracked as an Organization in your GIFTS system, open the Contact record and change the Primary Organization.

When a Contact Retires

When someone leaves an organization to enter retirement, we suggest these additional steps:

- If the Contact was the Primary Contact at the Organization, be sure to change the Organization's Primary Contact.

❖ Remove the Contact from any active mailing lists. On Page 2 of the Contact record, highlight each mailing list in turn and click Remove:

17 Generating Correspondence

This chapter describes how to generate correspondence and write-ups that include data merged from GIFTS. You can generate correspondence for your word processor, e-mail software, or both.

Note: Users of Essential GIFTS without the Correspondence option do not have access to these features.

In This Chapter

About Merged Correspondence **408**

The Correspondence Generation Wizard **408**

Creating Correspondence and Write-ups **412**

Creating Batch Correspondence **420**

Creating Mailing Labels **424**

Viewing and Editing Documents **424**

Sending E-mail Messages **424**

About Merged Correspondence

Most of your work with grantees and potential grantees involves the exchange of documents. During many points in your review process, you communicate with grantees and potential grantees through e-mail or printed correspondence.

For instance, many grant-makers send form letters to people when their application has been received and is being reviewed, when the grant-makers decline a proposal, when they approve a grant, and so forth. In addition, your staff may have to produce write-ups for your board regarding proposals and ongoing grants.

You choose the type of correspondence (or write-up) that you want to create from a list of templates created by your GIFTS administrator. These templates automatically merge data from your Requests, Organizations, Contacts, Affiliations, Payments, Requirements, and Activities into the text of the template. You can even create a batch of correspondence all at once.

GIFTS can store your correspondence and keep it available in relation to the record with which it is associated. You can reference your entire outgoing correspondence without having to look in your paper files.

The Correspondence Generation Wizard

You can create merged correspondence in relationship to any Request, Organization, Contact, Affiliation, Payment, Requirement, or Activity in your system. And you can create write-ups for your Requests. In addition, if you want to maintain a history of the correspondence you can create an Activity record that records the template used, the date, and any notes regarding the correspondence.

Correspondence and write-ups are created using the Correspondence Generation Wizard. This section tells you how to access the Wizard, and describes several of the options you can choose when you generate letters, e-mails, or write-ups.

For instructions on generating correspondence or write-ups for a single GIFTS records, please see "Creating Correspondence and Write-ups" on page 412.

For instructions on generating correspondence or write-ups for a batch of GIFTS records, please see "Creating Batch Correspondence" on page 420.

Accessing the Correspondence Generation Wizard

To open the Wizard and generate letters, e-mails, or write-ups, you can do either of the following:

- In the GIFTS Organizer, highlight the record or records you want to "write" about and select Action ➤ Send Correspondence from the main menu.
- Open the record and select Action ➤ Send Correspondence from the record's menu.

The Correspondence Generation Wizard opens:

Merge text and document preferences that you define for your correspondence are summarized at the bottom of the Wizard.

Branch Selection in Correspondence If you have Branch Security enabled, a Branch menu will be available. This defaults to the current user's branch.

Note: This is only a filter. You can still select another branch to see their templates. However, you may not have access to open them depending on the permissions set by your Administrator.

Request Views in Correspondence Request Views may be included in some templates by your Administrator. If a Request View is included in a template, it will include at most all the requests for the organization of the selected Request. The Requests included could be further limited by a saved search associated with the saved View, but they will always have the same Org ID.

Specifying Signer Information

When you generate a letter or e-mail, you can specify signer information that will appear at the bottom of the generated correspondence. This includes the signer's name and position, and can also include the name or initials of the person who prepared the correspondence (if different from the signer).

Note: If you have the optional Document Manager, the signer is recorded as the author of the document.

Once you have entered signer information, it stays the same each time you open the Correspondence Generation Wizard. You don't need to open the signer information again until you want to change it.

To add or change signer information:

1 From the Correspondence Generation Wizard menu, select Document ➤ Signer. The Signer Info window opens:

2 Enter information for any or all of the following fields:

Option	Description
Signer	The staff member who signs the correspondence. You can type the signer's name or choose it from the list.
Position	The signer's position.
Preparer	The initials of the staff member preparing the correspondence.

Note: All three fields are optional.

3 Click OK. You are returned to the Wizard.

Specifying Correspondence Generation Preferences

The preferences available in the Correspondence Generation Wizard allow you to determine delivery options for letters and e-mail. These options are described below.

Like signer information, the preferences you specify stay the same each time you open the Correspondence Generation Wizard. You don't need to open the preferences again unless you want to change them.

To specify correspondence generation preferences:

1 Choose Document ➤ Preferences from the Wizard toolbar. The Preferences window opens:

2 The following options are not always available when you open the Preferences window. It depends on the template you are using—

specifically, on the kinds of documents it produces: letters and/or e-mail, or write-ups.

Select the options appropriate for your selected template:

Option	Available if...	Description
Letter Correspondence should be sent to	...the template generates: ❖ Letters ❖ Write-ups	Select View/Edit to review your correspondence before printing, or Directly to Printer to print the letter without first reviewing it.
E-mail Tracking Options	...the template generates: ❖ E-mail	Select the check box if you want to request that an e-mail return receipt be sent to you when the recipient reads their message.
Batch Options	You have selected more than one GIFTS record for which to generate correspondence.	If you would like to store each letter in your batch as an individual document (Word file), select the "Merge batch letters as separate documents" check box. Otherwise, your letters will be merged into a single document.

3 When you are finished defining your delivery options, click OK. You are returned to the Correspondence Generation Wizard.

Creating Correspondence and Write-ups

This section describes how to generate correspondence or a write-up about a single GIFTS record. For details on generating correspondence for a batch of GIFTS records, please see "Creating Batch Correspondence" on page 420.

1 To open the Wizard and generate a letter, e-mail, or write-up about a GIFTS record, you can do either of the following:

❖ In the GIFTS Organizer, highlight the record and select Action ➤ Send Correspondence from the main menu.

❖ Open the record and select Action ➤ Send Correspondence from the record's menu.

The Correspondence Generation Wizard opens:

If Email mode is selected, the What tab allows you to choose an additional template to attach to the email.

Merge text and document preferences that you define for your correspondence are summarized at the bottom of the Wizard.

2 If necessary, set up your signer information and choose your preferences for this batch of correspondence.

❖ For information on setting up signer information, please see "Specifying Signer Information" on page 410.

❖ For details about preferences, please see "Specifying Correspondence Generation Preferences" on page 411.

3 From the Wizard's menu, choose Mode and select the type of correspondence that you want to create:

Option	Description
Printed Correspondence	GIFTS uses Microsoft Word to generate a printed letter.
Email Correspondence	If the recipient has provided an e-mail address, GIFTS generates an e-mail message. Otherwise, no correspondence is generated. Choosing Email mode allows you to select a secondary printed correspondence template to be attached to the email from the current category. *If you are generating a write-up, this option is disabled.*
Automatic	If the recipient has provided an e-mail address, GIFTS generates an e-mail message. Otherwise GIFTS generates a printed letter. *If you are generating a write-up, this option is disabled.*

The templates available for the correspondence type that you choose are displayed.

4 Select the template that you want to use to create your correspondence.

5 If you are generating a write-up, skip to step 10. Otherwise, click Next or click the Who tab.

6 In the Who tab, you can specify recipient information for the correspondence:

Tip: after you select a recipient (as described in Step 7), you can also manually edit the information in the To field. To enter a line break, hold down CTRL and press ENTER.

This salutation will be added to the correspondence below the recipient(s) address. If the salutation is not appropriate for the correspondence that you are creating, you can manually edit it after you choose a recipient.

7 By default, letter correspondence is sent to the Primary Contact with which the record is associated. To select another recipient, click To. The Select Addressee window opens:

The filtering options provided above the grid are described in the table below.

There can only be one addressee, so Select All and Deselect All are disabled here. You can use them when adding CCs, as described in the next step.

Note: If you are in Email mode, clicking the To button will give you a list of all contacts associated with the request. This allows you to choose multiple recipients from the list to send the correspondence to at once.

In the grid, select the addressee, using the following options to narrow your choices:

Option	Description
Show	From this drop-down, choose how you want to filter the list of possible addressees. The default is <All Affiliations>, which lists the Contact affiliated with the selected record, and every Contact affiliated with the Request and/or Organization associated with the selected record. <Organization Affiliations> limits the list to all Contacts affiliated with the primary Organization for the selected record. NOTE: Organization Affiliations may not be available if 1) you are generating correspondence for a Request *and* 2) your GIFTS administrator has set up your preferences to "Limit Request letter addressees to Request's Affiliations." <Request Affiliations> limits the list to all Contacts affiliated with the Request record associated with the selected record. Following these options is each Affiliation Role defined in your GIFTS system. Select a Role, and only those Contacts affiliated with the selected record, its Request, or (if available) its Organization *in that Role* are listed in the grid. NOTE: A particular Contact may appear more than once in the grid. A Contact is listed separately for each Affiliation he or she has to the selected record, its Organization, or its Request. Note that Affiliations may have different addresses or e-mail addresses—select the instance of the Contact that has the correct address for this letter.
Include closed Affiliations	Select this check box if you want Contacts to be available as addressees, even if their Affiliations to these records are closed. For more information about closed Affiliations, please see "About Affiliation Terms" on page 379.

After you have selected the addressee, click OK to return to the Wizard.

8 To send courtesy copies of the correspondence to other Contacts, click CC. (Some letter events do not allow CCs to be added, making this option unavailable.) The Select CCs window opens:

In the grid, select the check box next to each person to whom you want to send a courtesy copy. Click the Select All button to send a copy to each Affiliation on the list. (Remember, however, that some Contacts may be listed more than once, as they may have more than one Affiliation linked the record.)

After you have selected the other addressees, click OK to return to the Wizard.

9 If you are generating printed correspondence, and you want to print a copy of the letter for the CC recipients, select the "Print additional copies for CCs" check box. Click Next or the History tab to continue

10 Select the "Create an Activity for this correspondence" check box to create a Document Activity for the record you are working with:

You can enter the following Activity information.

Option	Description
Activity Date	The date of the Document Activity created for the correspondence. By default, this is the current date.
Notes	Any notes regarding the correspondence. The Notes are added to the Document Activity record.
Save e-mail text in activity long notes	If you are creating e-mail correspondence, you can add the text of the e-mail message to the Activity record's Long Notes field.
Keep document permanently on disk	If you are creating a printed letter and you want to maintain a copy for your records, you can use this option to save the actual word processor document. At any time, you will be able to access and view the letter through the Activity record. If you do not save the document, you cannot view, edit, or print it later. Please Note: If you leave this option off, the letter is placed in the \TEMP directory beneath the directory specified for documents in the System Preferences. This directory is not cleared by the system, and your Administrator should clear it out periodically to conserve space on your workstation.

11 Click Finish.

The next step to take depends on your Wizard preferences:

- If you chose to print your letter without reviewing it, the process is complete: the letter is sent to your printer.
- If you chose to review your printed letter, it is displayed in Microsoft Word. When you are finished reviewing the letter, save your changes. You can print the letter directly from your word processor.
- Otherwise, your correspondence is displayed in the Correspondence Viewer.

For details on reviewing and editing correspondence in the Correspondence Viewer, see "Working with the Correspondence Viewer" on page 419.

Working with the Correspondence Viewer

If you are working with e-mail messages—or you or your GIFTS administrator set up GIFTS to save batches of printed letters to individual document files—you can review and edit your correspondence in the Correspondence Viewer:

- If you are working with a batch of correspondence, click Previous or Next to view each e-mail message or letter.
- To edit the e-mail message or letter that is displayed in the Viewer, click Open. If you are editing an e-mail message, it is displayed in the E-mail Editor. Otherwise, GIFTS opens the printed letter in your word processor.

When you save your changes after editing the document, you are returned to the Correspondence Viewer.

- To prevent a message or letter in a batch from being sent—perhaps you are unsure if the Contact's name is correct—click Skip. When you send the batch, the skipped message is not sent and no Correspondence Activity information is recorded. You can go back and generate the correspondence later.

When you are ready to deliver your correspondence, click Send All. GIFTS records the date that the correspondence was created and the template that was used. E-mail messages are sent to the address in the e-mail header. Printed letters are sent to your printer.

Creating Batch Correspondence

You can create a batch of correspondence for any group of records in the Requests, Organizations, Contacts, Affiliations, Payments, Requirements, and Activities folders in the GIFTS Organizer. After you generate your correspondence, you can review and modify it before sending it to the e-mail recipient or to your printer.

To generate correspondence for a batch of records, use a search or zoom to display them in the Organizer grid and highlight the records for which you wish to generate correspondence. It's all right if records you do not wish to include in the batch are displayed—you can easily exclude them.

To highlight more than one record, hold down CTRL as you click on the records or choose Edit ➤ Select All from the Main menu. Each record you click on is highlighted, and you can de-select records by clicking on them again.

Tip: To send letters to everyone in one of your mailing lists, you can use Quick Find to search for all the Contacts in that mailing list.

To create correspondence for a batch of records:

1 Highlight the records and choose Action ➤ Send Correspondence from the Main menu. The Correspondence Generation Wizard is displayed:

Merge text and document preferences that you define for your correspondence are summarized at the bottom of the Wizard.

2 If necessary, set up your signer information and choose your preferences for this batch of correspondence.

- ❖ For information on setting up signer information, please see "Specifying Signer Information" on page 410.
- ❖ For details about preferences, please see "Specifying Correspondence Generation Preferences" on page 411.

3 From the Wizard's menu, choose Mode and select the type of correspondence that you want to create.

Option	Description
Printed Correspondence	GIFTS generates a printed letter in your word processor.
Email Correspondence	If the recipient has an provided an e-mail address, GIFTS generates an e-mail message. Otherwise, no correspondence is generated.
Automatic	If the recipient has an provided an e-mail address, GIFTS generates an e-mail message. Otherwise GIFTS generates a printed letter.

The templates available for the correspondence type that you choose are displayed.

4 Select the template that you want to use to create your correspondence.

5 If you are generating a write-up, skip to step 7. Otherwise, click Next or click the Who tab to specify the recipients of the correspondence:

Each Affiliation Role is listed in this grid, allowing you to choose the kinds of people you want to send a courtesy copy to.

For example, if you select the check box for Board Member under Organization, a copy of the correspondence will be created for every Contact who is affiliated *as a Board Member* with the Organization associated with the selected record.

If you also want to send copies to individuals affiliated as an Alternate Contact with the Request associated with the selected record, you need to select the Alternate Contact check box under Request.

When you create correspondence for a batch, it is sent to the Primary Contacts for the records in the batch. You can also send courtesy copies to other Contacts who are affiliated with the records in the batch, based on how they are affiliated to the selected records, each selected record's associated Organization and/or each selected record's associated Request.

6 If you are generating printed correspondence, and you want to print a copy of each letter for its CC recipients, select the "Print additional copies for CCs" check box. Click Next or the History tab to continue.

7 Select the "Create an Activity for this correspondence" check box to create Document Activities for each record included in your batch.

You can enter the following information for the Document Activity created for each letter in the batch.

Option	Description
Activity Date	The date of the Document Activity: by default, this is the current date.
Notes	Any notes regarding the correspondence.
Save e-mail text in activity long notes	If you are creating e-mail correspondence, you can add the text of the e-mail message to the Activity's Long Notes field.
Keep document permanently on disk	Use this option to save the actual word processor documents. At any time, you will be able to access and view the write-up through the Documents folder. If you do not save the documents, you cannot view, edit, or print it later. Please Note: If you leave this option off, the letter is placed in the \TEMP directory beneath the directory specified for documents in the System Preferences. This directory is not cleared by the system, and your Administrator should clear it out periodically to conserve space on your workstation.

8 Click Finish.

The next step to take depends on your Wizard preferences:

- If you chose to print your letter without reviewing it, the process is complete: the letter is sent to your printer.
- If you chose to review your printed letter, it is displayed in Microsoft Word. When you are finished reviewing the letter, save your changes. You can print the letter directly from your word processor.
- Otherwise, your correspondence is displayed in the Correspondence Viewer.

For details on reviewing and editing correspondence in the Correspondence Viewer, see "Working with the Correspondence Viewer" on page 419.

Creating Mailing Labels

The GIFTS Report Library includes several templates for generating mailing labels. If these standard formats suit your needs, you can run a mailing label report using the same search criteria that you used to create the batch of letters. For more information, please refer to *Using GIFTS Reports.*

Your GIFTS administrator may have also created letter templates for your mailing labels. This is advantageous because it offers you more control over the format of your mailing labels, and because correspondence templates are sensitive to the correspondence preferences set by your administrator.

The "Defining Correspondence Templates" chapter of the *GIFTS Administrator's Guide* describes how to set up mailing label templates.

Viewing and Editing Documents

If you save word processor documents to disk when you generate correspondence, you can view them later from the Organizer's Documents folder. For information about viewing and managing documents in GIFTS, please refer to "Working with Documents" on page 471.

Sending E-mail Messages

In addition to the merged correspondence that you can send by e-mail, you can also send regular messages directly from GIFTS to any Contact in your database.

Note: This feature is not available to Essential GIFTS users who do not have the Correspondence option.

Since GIFTS uses Activities to log your e-mail messages, a record of each message is associated with the records—such as a Contact, Organization, or

Request—with which is it associated. Then, you can search your Activities folder for the messages associated with a specific record.

You can select a single record and send a single message in regard to it, or select a batch of records and send a broadcast message.

- If you send a message in regard to a single record, GIFTS automatically enters the relevant addressees for the message. If necessary, you can edit the addressee list as you see fit.
- If you send a broadcast message, GIFTS automatically inserts addressee information from each record in the batch. For Contacts, each person's e-mail address is used. For Requests and Organizations, the message is sent to the Primary Contacts. You cannot modify the addressee list for broadcast messages.

To Send a Message

To send an e-mail message or broadcast message:

1. In the GIFTS Organizer, select the Requests, Organizations, or Contacts for which you wish to send an e-mail message.

2. On the GIFTS toolbar, click the Send E-mail button. Depending on the e-mail program that you are using, you may be prompted to log in to your mail system.

   Tip: The e-mail fields in Contact records display the Contact's e-mail address as a "hot link" (with blue, underlined type). To send an e-mail to the Contact, you can click this link.

3 Login to your e-mail program, if necessary. The e-mail options are displayed:

GIFTS automatically addresses the e-mail to the appropriate Contacts. Only those contacts with an e-mail address in their Contact record are addressed automatically. You can add an address if necessary, but for future use you should ensure that each of your Contact records includes an e-mail address.

Note: If you are sending a broadcast e-mail, you cannot edit the recipient list.

Field	Description
Addressees	GIFTS includes the relevant Contacts who have an e-mail address. To add an addressee, choose the appropriate Type (To, CC, or BCC), enter his or her address in the space provided, and click Add. To remove an addressee, highlight their address and click Delete. If you are sending a broadcast message, you do not have access to the Addressee information. GIFTS addresses the message to each Contact or to the Primary Contact of each Organization or Request.
Include/Do not include affiliated Contacts as BCCs	Use these radio buttons to quickly address blind courtesy copies (BCCs) to all affiliated Contacts for the record with which you are working. If you want to remove one or more Contacts from the Addressee list, highlight the appropriate Contacts and click Delete.

Field	Description
Subject	The subject of the message.
Receipt	Request's a message confirming that the message was received from the recipient's e-mail system. Your GIFTS user account must include an e-mail address to which the receipt can be sent.
Text	The body of the message.
Log Mail Activity	If this option is on, GIFTS creates an Activity record indicating that the message was sent. The Document Activity record includes "e-mail" as its Title and the Subject that you specified for the message.
Save Message in Activity	Enable this option to save the text of the message in the Long Notes field of the Document Activity record.

4 When you are finished addressing and composing the message, select the appropriate options for logging the message and click Send. The message is delivered and, if you chose to log and/or save the message it is logged and/or saved in your Activities folder.

Viewing an E-mail Activity or Saved Message

If you chose to log an e-mail message, you can view its Activity record at any time. If you chose to save the message, you can also view the message itself. Please note that while a record of the message is displayed in the Documents folder, to open the message log you must go to the Activities folder.

To open the Activity record, you can do one of the following:

- In the Organizer, locate the Activity record. You can zoom in on the record that the message was associated with and then view its Activities, or use the Activities Quick Find to search for the message. Highlight the Activity and choose File ➤ Open from the Main menu.
- In the Activities Calendar, locate the day on which the Activity falls in the Monthly view and then click on the Daily folder tab. Highlight the Activity, and choose File ➤ Open from the Main menu.

The Activity record for the message is displayed.

If the text of the message was saved, you can read it by going to the Long Notes tab. For more information about Activity records, please refer to "Working with Activities" on page 407.

15 Working with Activities

This chapter describes how to track and schedule your day-to-day work using GIFTS Activity records.

Note: Activities are not available to Essential GIFTS clients who do not have the Calendar / Activity Tracking option.

In This Chapter

About GIFTS Activities **430**

Accessing Activities **431**

Searching for Activities **435**

Adding and Modifying Activities **437**

Marking Activities as Done **445**

Transferring Activities to Another Branch **448**

Deleting an Activity **449**

Exporting Activities to Outlook **450**

About GIFTS Activities

During your day-to-day work, you need to track various actions and pieces of information like notes from phone conversations and write-ups from site visits. In addition, you may need to know when a certain letter was sent from GIFTS or when material was received from a grantee.

The GIFTS Activities tracking features help you keep track of these events. Some Activities are logged automatically—such as when you send a merged letter. Other Activities can be logged in manually as they are needed.

'Activities' is, in a sense, a catch-all category for the recording of several different kinds of GIFTS events. Each class of activity serves either to audit your GIFTS actions, or to remind you of appointments and deadlines.

The following classes of Activities are created automatically to record important GIFTS events and decisions. There are a number of different types within each class of Activity.

Class	Description
Documents	Document Activities record correspondence and other documents produced through GIFTS; they are logged automatically by the system when documents are generated. If the actual word processor files for documents are saved on your system, you can access them directly from their respective Activity records. **Note:** If you have the optional Document Manager Module, you can also link external documents to the system by means of an Activity.
Export	Export Activities are logged automatically by the system to record Payment exports.
History	Activities logged automatically by GIFTS when certain actions are performed within the system. For instance, when you Approve a Request, GIFTS logs an Activity with the type Grant Approval. This feature automatically creates an *Audit Trail* of the important events in the life of a Request.
Import	Import Activities are logged automatically by the system to record A/P and data imports performed using the Administrator Module.

The following classes of Activities are ones you create and enter manually. There are a number of different types within each class of Activity.

Class	Description
Grant Requirement	Grant Requirements are requirements due from grantees or prospective grantees as part of the proposal or grant evaluation process.
Payment Requirement	Payment Requirements are requirements due regarding specific Payments. They can be used to make a payment contingent upon the receipt of a certain Requirement.
To Do	Any event or piece of information that you wish to track, excluding those that GIFTS tracks automatically. For instance, you may wish to schedule or log site visits, meetings, interviews, and telephone calls that are related to your grant making. To Do Activities allow you to schedule and then maintain records and notes for these events.

Note: Grant and Payment Requirements form a distinct kind of Activity; Requirements even have their own Organizer folder. For more information on these kinds of Activities, see "Working with Requirements" on page 327.

Accessing Activities

There are several ways to access Activities in GIFTS:

Accessing Activities in the Organizer **431**
Accessing Activities in the Calendar **433**
Accessing Activities from a Request Record **434**

Accessing Activities in the Organizer

You can view and access Activities in the Activities folder of the Organizer. Requirements and Documents, two specific types of Activities, each have their own folders in the Organizer. You can view Requirements and Documents in the Activities folder or in their own folders.

To view Activities in the Organizer, you can:

- Use the Quick Find search for Activities (or Documents or Requirements).
- Zoom in on the record (such as a Request or Contact) that you are working with. Switch to the Activities folder to view all the Activities associated with that record.

By default, Activities are sorted by their dates, descending from the latest to the earliest. Activities with the same date are sorted alphabetically by the name of the Organization with which they are associated.

You can customize the format and content of the information in the Organizer, as described in "Working with the Organizer" on page 37. The following default information is displayed in the Activities folder:

Column	Description
Locked Status	A padlock is displayed if the Request associated with the Activity has been locked. If the lock is green, you can edit the Activity. If it is red, you cannot.

Column	Description
What/When	The Activity Type (such as "Final Report" or "Grant Approval"), the date on which it was Due, Received, and/or Done, and the Login ID of the staff person assigned to the Activity. To Do activities will also include the Start Time next to the Due Date. If the Activity is Done, the Login ID of the staff person that marked it as Done is also displayed.
With	The Organization, Contact, Request and/or Payment with which the Activity is associated. (Not every Activity is associated with all four of these items.) In addition, the Contact's Office Phone Number is displayed for quick reference.
Notes	Any notes entered regarding the Activity.
Letter/File Name	If the Activity record is in regard to a document, the type of document—such as "Declination Letter" or "Proposal Summary"—and its filename.
Audit	The audit trail displayed in this column shows the history of each Activity record.

The listed Activities are color-coded to indicate their Status: Open, Done, or Overdue.

Accessing Activities in the Calendar

The Calendar is specifically designed to put all of your Activities at your fingertips, and provide easy access to view and modify them. In the Class

field of the Calendar, you can choose to display all Activities, or to show only a specific Class. Within each Class, you can limit the view to a specific Type.

For more information about accessing Activities in the Calendar, see "Working with the Calendar" on page 435.

Accessing Activities from a Request Record

You can view a schedule of all Activities associated with a Request within the Request record itself. To view a Request's Activity Schedule, open the Request record and click on the Activities tab. The Activities associated with the grant are displayed.

You can limit the display to a certain Class of Activity using the Class field. (To see all Classes of Activities, select 'All' from the list.)

Once you have selected a Class of Activities, you can further limit your display to a certain Type.

If you check the Activities Due box, you can limit displayed Activities to those due within a certain date range. Use the drop-down menu to select the date range, such as 'Within 2 weeks' or 'Within 6 months.'

You can filter the Activities by Class, Type, and Activities Due fields displayed at the top of the grid. In the example above, the Activities are filtered to display the site visits due within the next two weeks.

Searching for Activities

In most day-to-day situations, you will be viewing Activities in the context of another record, such as a specific Organization or Request, rather than searching for them. If you are planning your schedule for a particular day, the Calendar is the best tool.

For example, you need to know the date of the next site visit with the Brooklyn Ballet. In this case, you would probably just zoom in on the Brooklyn Ballet record in the Organizations folder, then switch to the Activities folder to see the associated Activities.

If you need to, you can also search for Activities using the Quick Find for the Activities folder. If you are searching only for Documents or Requirements, you can use Quick Find in those folders, limiting your search to those particular classes of Activities.

You can search the Activities folder using any of the search techniques described in "Searching for Data in GIFTS" on page 77. This section details each of the Quick Find search properties for Activities.

In the Activities folder, you can search on any combination of the following properties:

Property	Description
Activity is Open	Click this option to search for Open Activities.
Activity is Overdue	Click this option to search for Overdue Activities.
Amendment Amount	The amount of the Grant Amendment in Historical Activities created by the system in order to log Grant Amendments.
Coding Sheet	Click this option to build a query using the Request Coding Sheet.
Class and Type	A specific Class and/or Type of Activity, such as “To Do” or “Rollback to Pending.”
Contact’s Last Name	The last name of the Contact associated with the Activity.
Done Date	The date on which the Activity was marked as Done.
Done User	The member of your staff who marked the Activity as Done.
Due Date	The date on which the Activity was scheduled.
Organization’s Name	The name of the Organization associated with the Activity.
Received Date	This search criterion will find only Grant and Payment Requirements. It is the date on which the Requirement (such as a progress report) was received.
Request ID	The unique, system-generated ID of the Request with which the Activity is associated.
Staff	To member of your staff to whom the Activity is assigned.

Using the Activities Filter

To use the legend located at the bottom of the screen to filter the records displayed in the Activities folder based on their Status:

1. In the Activities folder, click on the legend indicating the Status of the Activities you wish to view. The Status "pops up" to indicate that it has been selected:

   The Activities are instantly filtered so that only Activities with the appropriate Status are displayed.

2. To remove or change the filter, click on the Status again or click on a different Status.

Note: The filter can only show you records included in the Quick Find search results. For instance, if your Quick Find search excludes Open Activities, no records are displayed if you choose the Open filter.

Adding and Modifying Activities

Many Classes of Activities, such as 'Export' and 'History,' are comprised of system Activities, created automatically by GIFTS to record certain actions. Other Activities, such as 'To Do' Activities, must be added by the user.

Note: Grant and Payment Requirements must also be added by the user. For more information on adding Requirements, see "Working with Requirements" on page 327.

When you add a new To Do Activity, you should be conscious about the Organizations, Contacts, or Requests that you wish to associate with the Activity. The following chart shows how Activities are automatically related to Organizations, Contacts, and Requests at the time that they are entered.

An Activity Created from…	**Is Associated with**…
an Organization record (or the Organizer, while zoomed in on an Organization)	the Organization and the Organization's Primary Contact

An Activity Created from…	Is Associated with…
a Contact record (or the Organizer, while zoomed in on a Contact)	the Contact and his or her Primary Organization
a Request record (or the Organizer, while zoomed in on a Request)	the Request, the Organization that submitted the Request, and Request's Primary Contact
a Payment record (or the Organizer, while zoomed in on a Payment)	the Payment, its associated Request, the Request's Organization, and the Request's Primary Contact
the Organizer, with nothing zoomed	Nothing
the Calendar	Nothing

For instance, if you wish to create an Activity that is associated with a specific Request, first locate the request in the Requests folder and zoom in on or open the Request. This may be more convenient than opening a blank Activity form and entering Request information manually.

Note: You can edit the Organization, Contact, and Request information for Activities at any time.

Note: All new Activities associated with a specific record will default to the Staff member assigned to the Request. You may select another staff member using the drop-down menu for that field before saving the new activity.

To create a new Activity that is not associated with a specific record, you can do any of the following:

- In the Daily Calendar, choose File ➤ New ➤ Activity from the Main menu.
- In the Activities folder of the Organizer, click the New button on the Folder toolbar.

To create a new Activity that is associated with a specific record, you can do any of the following:

- Open a blank Activity form (as if you were creating an Activity unassociated with any record) and use the Find buttons to add

Organization, Contact, and Request. Note that you cannot associate the Activity with a specific Payment using this method.

- In the Organizer, zoom in on the record you wish to create an Activity for (Organization, Contact, Request, or Payment) and choose File ➤ New ➤ Activity from the Main menu.

- In the Organizer, open the record you wish to create an Activity for and choose File ➤ New ➤ Activity from the Main menu.

- In the Daily Calendar, select File ➤ New ➤ Activity from the Calendar menu. Then, click the Find buttons in the Activity record to associate it with an Organization, Contact, or Request. Note that you cannot associate the Activity with a specific Payment.

Historical Activities, such as the record of a Grant Amendment, are created automatically by GIFTS and are assigned to the user logged in at the time the logged event occurred.

You can edit any existing Activity, including—if you have been granted the needed permissions—the Historical Activities generated by this system. To open an existing Activity, you can do one of the following:

- In the Activities folder of the Organizer, click on the Activity and then click on the Open button on the Folder toolbar, or choose File ➤ Open from the Main menu.

- In the Calendar, locate the day on which the Activity falls in the Monthly view and switch to the Daily Calendar. Highlight the Activity, and click

the Open button on the Folder toolbar or choose File ➤ Open from the Main menu.

The Status of the Activity is indicated here.

The Find Request ID or Ref. No. field and Find button are available when creating or modifying an Activity. These features are described in "Finding a Request from within an Activity" on page 443.

Once the Request ID or Reference Number has been entered, it is displayed in this view-only field.

Note: If you are using branch security for the *centralized* data entry model, and you are adding a new Activity *not* associated with a Request, you will see an additional field called 'Branch' above the Notes field. The field defaults to the branch associated with the user creating the Activity, but can be changed. For information on the centralized data entry model, please see "About Branch Security" on page 238 in the *Administrator's Guide*.

You can work with the following fields for an Activity:

Field	Description
Organization	The Organization associated with the Activity. If you opened this new Activity by first zooming on a Request, or by clicking New in the Activities tab of an open Request, the grantee Organization is already filled in. If you are creating this new Activity from a blank form, use the Find button to search for the Organization.

Field	Description
Contact	The primary Contact for the Activity. If you opened this new Activity by first zooming on a Request, or by clicking New in the Activities tab of an open Request, the primary Contact for the Request is already filled in. If you are creating this new Activity from a blank form, the primary Contact is entered when you select the Request ID/Reference Number. In either case, you can modify the Contact field by opening the field's drop-down menu. All Contacts associated with the Request's Organization—and that Organization only—are available.
Req. ID / Ref No.	The ID Number and/or Reference Number of the Request. If you opened this new Activity by first zooming on a Request, or by clicking New in the Activities tab of an open Request, the Request's ID and/or Reference Numbers are already filled in. (The field and Find button are still available if you need to modify the Requirement.) If you are creating this new Activity from a blank form, use the Find Request ID or Ref. No. field and/or the Find button to search for the Request. For information on using the Request find options, please see "Finding a Request from within an Activity" on page 443.
Staff	The member of your staff associated with or responsible for the Activity. For Historical Activities, such as a Grant Approval, the system automatically associates the staff member logged into the system as the staff member who performed the Activity. When creating a new Activity, you can choose the appropriate staff member from the list.
Type	The Type of the Activity. For each Activity Class, your Administrator has defined a list of Activity Types. You can specify or change the Type of the Activity; only the Types for the Class of Activity you are working with are available. You may only create To Do activities in this way and therefore only the To Do activity codes are available. If you wish to create a Grant Requirement or Payment Requirement, such as the scheduling of a report, please refer to "Working with Requirements" on page 327.
Due	The date for which the Activity is scheduled, such as the date of the meeting.

Field	Description
Start Time	The time when the Activity, such as a meeting, will begin. This optional field can be left blank for To Do Activities that are not time-specific. When entering the Start Time, you can enter just a few numbers (rather than down to the minute) as long as you aware of the how the field behaves. If you enter **11** in the hour section of the field, the field will now read 11:00 AM. Be aware, however, that the field works on a 24-hour clock when accepting entries. For example, if you enter **23** in the hour section of the field, the field will not read 2:30—it will view that as 2300 hours. After you leave the field, it will read 11:00 PM. Also note that when you enter an hour equal to or less than 12, the field defaults to AM. For example, if you enter **023** in the hour section of the field, the field will now read 2:30 AM. You can then edit the Start Time to read 2:30 PM.
Duration	The duration of the Activity. This field is optional. When entering the Duration, you can use the drop-down menu to select certain typical durations, such as '15 minutes' or '2 hours.' If you want to type in the duration of the Activity, note that the field reads your entries as minutes unless you specify another unit of measurement. For example, to schedule an Activity for an hour and half, you can enter any of the following: **90**; **90 minutes**; or **1.5 hours**. After the duration is entered, the field will then display the duration in the biggest unit possible. For example, if you enter **90** and tab out of the field, the field will then read '1.5 hours.' If you entered **48 hours**, the field will change to display '2 days.'
Done	The date on which the Activity was completed.
Notes	Any notes you wish to make regarding the specific nature of the Activity or the results of the Activity. This field has a 255-character limit. You can click the Long Notes tab to enter additional, unlimited information about the Activity.

When you are finished, click Save and Close to save the Activity or Cancel to exit without saving it.

Finding a Request from within an Activity

If you know the ID or Reference Number of the Request to which you are adding an Activity, you can enter it in the Find Request ID or Ref. No. field. If only one matching Request is found, the Organization and Contact fields will be updated as well. If the Request is not found, or if more than one matching Request is found (for example, if they have the same Reference Number), the Search for Requests window will open.

The field can also be used in conjunction with the search button. If you know part of the ID or Reference Number, use the asterisk (*) as a wild card and then click the Find button. Your search will be limited to those Requests with matching ID and/or Reference Numbers.

If you know the Organization with which the Request is associated, you can enter this information in the Activity before searching for Requests. Your Request search will then be limited to those associated with that Organization.

To search for Requests from within the Activity form:

1 Click the Find button. The Search for Requests window opens:

The search parameters are displayed here.

In this particular case, United Federation, Inc. has already been entered in the Organization field of the Activity.

The results of the search are displayed in the grid. The results are updated as you change your search parameters.

The following columns of Request details are displayed from left to right: Locked status, Alerts, Disposition, Type/Status, Organization, Requested/Granted amount, Project Title, Fund/Program, the ID and/or Reference Number, and Audit trail.

2 From the drop-down menu, select 'Contains,' 'is Exactly,' or 'Starts with.' In the ID/Reference number field, enter the digits you know. Use the asterisk (*) as a wild card. Click Search.

3 Find the Request in the Search for Requests grid. Highlight the Request and click OK.

The Search for Requests window closes. In the Activity form, the Request ID/Reference number, the Organization, and the Contact have been updated.

Assigning Staff to a Batch of Activities

You can select a batch of Activities and assign a single staff member to them in one action. This might be particularly useful if one member of your staff is temporarily taking responsibility for Activities monitored by another.

First you must select the Activities you want to modify. To continue the example just described, you could use Quick Find in the Activities folder to search for records by staff member over a certain period of time.

Once you have displayed the Activities you want to change, perform the following to assign a staff member:

1 In the Organizer, highlight the records you want to change.

2 From the main menu, choose Action ➤ Assign Staff. The Assign Staff window opens:

3 From the drop-down menu, select the staff member to whom you wish to assign the selected Activities, then click OK.

You will be prompted to confirm this change; click Yes to continue. A process log will summarize your action:

Note: In order to assign staff to Activities, your Administrator must grant you permission to update Activities. If you do not have adequate GIFTS permissions, you will receive an informational message, and no records will be changed.

Marking Activities as Done

When an Activity has been completed, it should be marked as Done in the system. This prevents it from appearing in reports and queries of Activities that are still pending and, in the case of Payment Requirements, releases the Payments contingent upon them. GIFTS considers an Activity complete if a Done Date has been supplied in the Activity record.

Marking a Single Activity as Done

If you are working with an Activity in the Calendar view or you have highlighted an Activity in the Organizer, you can mark the Activity as Done without opening the record itself.

If you want to use the current date as the Done Date, and you do not wish to add notes to the Activity, do either of the following:

❖ Open the grant record and go to the Activities tab to display its associated Activities. Then, highlight the Activity and click Mark as Done.

- Highlight the Activity in the Daily view of the Activities Calendar. Then, choose Action ➤ Mark as Done from the Calendar menu.

To choose a different Done Date, or to add notes to the Activity as you mark it done, do either of the following:

- Open the Activity (from the Organizer's Activities folder, the Activities tab of a grant, or the Calendar view) and click the Mark as Done button. Change the Done Date if you wish (it will default to the current date), edit the Notes and/or Long Notes fields, and click Save and Close.

- Highlight the Activity in the Organizer's Activities folder and choose Action ➤ Mark as Done from the Main menu.

The Done Date field defaults to the current date, but you can change it if you want. Also enter any comments you have in the Notes field; they will be saved in the Activity record.

The Activity is marked as Done. The system changes the Status of the Activity to Done, identifies the current date (according to your system clock) as the Done Date (unless you have edited that date), and identifies you as the user that marked the Activity as Done.

Re-opening a Done Activity

If you mark an Activity as Done by mistake and wish to change its Status back to Open, open the Activity and click the Undo button. The Status returns to Open and the Done Date is cleared.

Marking a Batch of Activities as Done

You can mark a batch of Activities as Done without having to access each individual Activity. GIFTS will prompt you for a Done Date, as well as any Notes you would like to add onto the existing notes for the selected Activities.

To select a group of Activities for batch processing, use a search or zoom to display them in the Organizer grid and highlight the Activities that you wish to process. It's all right if the Organizer also includes Activities you do not wish to mark as Done—you can easily exclude these Activities.

To highlight more than one Activity, hold down the CTRL key as you click on the Activities, or use the Select All option to highlight all displayed Activities.

Note: You can de-select a highlighted Activity by holding down the CTRL key and clicking on it. Other selected records will remain highlighted.

To mark a batch of Activities as Done:

1. In the Organizer, highlight all of the Activities you wish to mark as Done.
2. From the Main menu, choose Action ➤ Mark as Done.
3. Select the Done Date if it is different than the current date, and indicate any appropriate Notes for this batch of Activities.
4. Click OK to begin the processing. GIFTS processes the batch and displays a log of the results.

5. Check the log to verify that all of the Activities were processed, and note any discrepancies. You can click Print or Save As to keep the log for your records.

Click Close to exit the log.

Transferring Activities to Another Branch

If you are using branch security, you can transfer Activities *not* associated with a Request to another branch. (Activities associated with a Request will only be transferred to another branch when the Request itself is transferred.)

Who may transfer Activities to another branch depends on the branch security model you are using. These two models, based on decentralized data entry versus centralized data entry, are described in "About Branch Security" on page 238 of the *Administrator's Guide*.

- If you are using branch security for the decentralized data entry model, you must log in to GIFTS as a user in the Admin group.
- If you are using branch security for the centralized data entry model, you must log in to GIFTS as a user with permission to modify records from the branch associated with the Activity or Activities. (This would include the Admin group.)

Transferring a Single Activity to Another Branch

To transfer a single Activity to another branch:

1. In the Activities folder of the Organizer, open the Activity you wish to transfer.
2. From the Activity menu, select Action ➤ Transfer Branch. (This menu item will not appear if you are in an Activity associated with a Request.)
3. Select the branch to which you wish to transfer the Activity and click OK.

   A message opens you informing you that the new branch will be saved when you save the Activity record. Click OK, then click Save and Close to save the Activity.

Transferring a Batch of Activities to Another Branch

To transfer a batch of Activities:

1. In the Activities folder of the Organizer, display and highlight the Activities you wish to transfer.
2. From the main menu, select Action ➤ Transfer Branch.
3. Select the branch to which you wish to transfer the Activities and click OK. A process log opens, detailing the results of your batch transfer:

Activities associated with a Request are not transferred; the first item in the process log above demonstrates the result. Other Activities are transferred to the new branch.

Deleting an Activity

You can delete an Activity from the system at any time. The associations of the Activity with any Organization, Contact, or Requests are eliminated; however, the Activity record is the only record that is actually deleted.

If the Activity is a Payment Requirement and a Payment is Contingent upon it, the Status of the Payment becomes Scheduled when you delete the Activity since there is no longer a contingency that needs to be met.

To delete an Activity:

1. Open the Activity, as described in "Accessing Activities" on page 431.

2 From the Activity menu, choose File ➤ Delete. You are prompted to confirm that you want to delete the Activity.

Click Yes. If a Payment was contingent on the Activity, its Status is changed to Scheduled and you are notified with an informational message.

Exporting Activities to Outlook

If you use Microsoft Outlook to manage your appointment calendar and to keep track of your to-do list, exporting GIFTS Activities and Requirements to Outlook will make those tasks much easier.

Note: When you export Requirements or Activities to Outlook, GIFTS can export the Contacts associated with those records as well. Contacts can also be exported to Outlook from the Contacts folder in the Organizer. For more information, please see "Exporting Contacts to Outlook" on page 370.

When you export records from the Activities folder to Outlook, GIFTS exports only manually-created classes of Activities. These include To Do's such as Site Visits, Grant Requirements, and Payment Requirements. Each class of Activity in GIFTS will be transferred to Outlook as a certain kind of Outlook record:

In GIFTS	In Outlook
Grant or Payment Requirements	Tasks
To Do Activities	Appointments
Contacts	Contacts

To export Activities to Outlook:

1 Display the Activities you want to export in the Organizer grid. If you are exporting only some of the displayed records, highlight them now.

2 Select File ➤ Export ➤ Outlook from the main menu. The Export to Outlook window opens:

3 Set up your Outlook export options. First, determine which records you want to export:

Select the 'Export all records' radio button to export all the Activities currently displayed in the Organizer. Select 'Export only selected records' to export the Activities currently highlighted.

If you want to export the Contact associated with each Activity, check the 'Include Contacts' check box.

Note: Users of Essential GIFTS will not see this Contacts check box unless they have the Contact Manager option as well.

4 Next, you should determine how you want to treat Activities, Requirements, and Contacts that have been exported to Outlook before:

The current method selected for dealing with duplicates is shown here.

Note: Contacts are considered duplicates when all of the following three fields match exactly: first name, last name, and e-mail address. Duplicate Activities and Requirements are determined by the record's Activity ID. For more details, please see "How Duplicate Activities are Determined" on page 453.

Click Preferences to change your method of dealing with duplicate records:

- If you choose 'Overwrite duplicates with updated information,' duplicate records are deleted and replaced with updated information from GIFTS. For example, if you are re-exporting a Grant Requirement and its Due Date has been changed in GIFTS, the corresponding Task in Outlook will be rescheduled accordingly.

  Important: Since the record in Outlook is deleted and then replaced with updated information from GIFTS, any additional data that has been added in Outlook is deleted by this process.

- Choosing 'Allow duplicates to be created' is *not recommended* when you are exporting Activities or Requirements. (This option is useful mainly when exporting Contacts from the Contact folder.)

- Choose 'Do not export duplicate items' to stop the export of any duplicate Activities, Requirements, or associated Contacts.

Click OK to close the window.

5 Select the folders in Outlook to which you want to export each kind of GIFTS record.

Note: The last folder you used as export destination is displayed for each kind of record. (If you are exporting for the first time, the primary Outlook folder of each type is used as the default.) Click Select Folder only if you need to make a change.

- GIFTS Activities are exported to Outlook as Appointments. Click the Select Appt. Folder button to choose an Outlook Appointment folder for your exported Activities. (In this case, 'Activities' refers *only* to To Do-class Activities such as Site Visits and Phone Calls.)
- GIFTS Requirements are exported to Outlook as Tasks. Click the Select Task Folder button to choose an Outlook Task folder for your exported Requirements.
- GIFTS Contacts are exported to Outlook as Contacts. Click the Select Contact Folder button to choose an Outlook Contact folder for your exported Contacts.

For each of the three GIFTS records, you must select the correct type of Outlook folder as the destination. If you choose an Outlook folder of a different type, you will receive an error message and be asked to select a different folder.

6 Once you have selected your export options, click Export to send the GIFTS records to Outlook.

How Duplicate Activities are Determined

As noted above, the export feature uses the Activity ID of a GIFTS Activity or Requirement to determine if it has been exported before. If you are performing an export and the Activity ID of a selected record matches the

Activity ID stored in an Outlook Appointment or Task, the two records are considered duplicates.

In Outlook Appointments and Tasks, Activity ID numbers are saved in a field called MERECID. By default, this field is neither displayed nor available for editing, and it is not a standard Outlook field.

This is considered a "user-defined" field. The ability to create user-defined fields in Outlook is based on a system permission. This permission is granted to you on a folder-by-folder basis. GIFTS 'asks' Outlook to create this new field for records in a folder the first time you export to that folder.

If you try to export Activities without this Outlook permission, a message will remind you that the records will not include Activity ID. You can click OK to proceed or Cancel to stop the export. If you continue in the folder you selected, Activities and Requirements will be exported to Outlook without their Activity ID numbers. It will be impossible for GIFTS to recognize duplicate records.

Your systems administrator should be able to grant you these permissions as needed.

How GIFTS Activities are Scheduled in Outlook

When you export a GIFTS Activity to Outlook as an Appointment, you should be aware of how the Appointment will be scheduled, and what Activity data will be included.

Note: For information on how Requirements translate to Outlook Tasks, please see "How GIFTS Requirements are Scheduled in Outlook" on page 344.

Below is a sample To Do Activity as it appears as an Outlook Appointment:

Outlook Appointment Field	GIFTS Data Source
Subject	Activity type (in this case, 'Phone Call') followed by the Organization associated with the Activity.
Start Time (date)	Activity Due Date
Start TIme (time)	Activity Start Time Please note that if neither Start Time nor Duration is entered for the Activity, it will be exported to Outlook as an 'All Day Event' If an Activity has a Duration entered, but no Start Time, it will be scheduled to start at 9 a.m. on the Due Date

Outlook Appointment Field	GIFTS Data Source
End Time	Activity Start Time plus Activity Duration If an Activity has a Start Time, but no Duration has been entered, the export default is to schedule the Outlook Appointment for 30 minutes (half an hour).

Other details from the GIFTS Activity record appear in the body of the Outlook Appointment.

Tip: Appointments can be modified and rescheduled in Outlook after they have been exported from GIFTS. Please note, however, that you cannot export changes from Outlook back to GIFTS.

16 Working with the Calendar

This chapter describes how to review your Activities and Requirements, schedule new ones, work with pending Payments, and review the schedules of your staff in the GIFTS Calendar.

Note: The Calendar is not available to Essential GIFTS clients who do not have the Calendar / Activity Tracking option.

In This Chapter

Accessing the Calendar **458**

Displaying Data in the Calendar **458**

Working with Records in the Daily View **465**

Printing the Monthly Calendar **466**

Printing the Daily Calendar **467**

Exporting from the Calendar to Outlook **467**

Closing the Calendar **470**

Accessing the Calendar

The Calendar displays your Activities and Payments in the form of a Monthly or Daily calendar.

To switch to the Calendar, choose View ➤ Calendar from the Main menu.

Tip: If you want to start in the Calendar when you first log in to GIFTS, you can choose View ➤ Start in Calendar from the Calendar menu.

Displaying Data in the Calendar

You have several options for displaying and accessing data in the Calendar. In the Monthly Calendar, you can browse through different months and years, viewing Activity, Requirement, and Payment information. In the Daily view, you can review the events for that day. In addition, you can create and modify Activities and Requirements and mark them as Done.

Setting the Calendar Display Options

The Calendar is really two separate calendars, one that shows you Activity information (To Do Activities, Requirements, Historical events, and so on) and one that shows you Payment information. To switch back and forth between these calendars click the Activities and Payments buttons.

Finding and Displaying Activities

There are two ways to find the Activities you want displayed in the Calendar:

- Use the Calendar Find options to filter Activities by Class, Type, group, and/or staff member (you can also choose to include or exclude Done Activities).
- Use the Get Search option to access your saved searches.

To use the Find options, select the Find radio button in the Calendar. The filters appear as drop-down menus:

Use one—or a combination—of these options to display the information you need in the Activity Calendar (these options apply to both the Monthly and Daily view):

Option	Description
Class	Choose the Class of Activity you want displayed from this list or choose <all> to see all Activities. For descriptions of the GIFTS Activity Classes, please refer to "About GIFTS Activities" on page 408.
Type	Within each Activity Class, you can choose a specific Type of Activity. This option is not available if you are viewing <all> Activity Classes.

Option	Description
Group	To view Activities for a user group, select the group from the list or choose <All> to view the Activities for all user groups. Note that when you select a group, all Activities for the Staff members in the group are listed. If you select a group and then select a Staff member, the group is reset to <All>.
Staff	Choose a staff member from this list to view their Activities or choose <All Staff> to view the Activities for every staff member.
Include "Done" Activities	Check this box to view Activities that have been marked as Done, in addition to your pending Activities.

To use a saved search to find Activities, select the Get Search radio button. (The saved search option is available in both the monthly and daily view.)

After you have gotten your search, the details of the search are displayed here.

Click the Get Search button to see the list of your saved Activity searches:

Highlight the search you want to run and click the Select Search button. (For more details, see "Running a Saved Search" on page 101.) The Calendar then displays the Activities found by the saved search.

The search details are listed here. They include the title of the saved search and the date criterion as determined by the current Calendar view.

After performing the saved search, you can move to another month, or from monthly to daily view. Activities matching the search parameters are displayed. The date information shown here changes accordingly.

Click Get Search again to perform a different saved search; the results of the first search will be cleared and the new results displayed.

Click Clear Search to clear the Calendar of all displayed Activities.

Finding and Displaying Payments

There are two ways to find the Payments you want displayed in the Calendar:

- Use the Calendar Find options to filter Payments by status, type, group, and/or staff member.
- Use the Get Search option to access your saved searches.

To use the Find options, select the Find radio button in the Calendar. The filters appear as drop-down menus:

Use one—or a combination—of these options to display the information you need in the Payments Calendar (these options apply to both the Monthly and Daily view):

Option	Description
Status	Choose a Status from this list to view Payments of a specific Status, such as Contingent or Void. You can choose <all> to see Payments of every Status.
Type	Choose the Payment type to view, such as cash or wire transfer, or choose <all> to view all Payment Types.
Group	To view Payments for a user group, select the group from the list or choose <All> to view the Payments for all user groups. Note that when you select a group, all Payments for the Staff members in the group are listed. If you select a group and then select a Staff member, the group is reset to <All>.
Staff	Choose a staff member from this list to view their Payments or choose <All Staff> to view the Payments for every staff member.

To use a saved search to find Payments, select the Get Search radio button. (The saved search option is available in both the monthly and daily view.)

After you have gotten your search, the details of the search will be displayed here.

Click the Get Search button to see the list of your saved Payment searches.

Highlight the search you want to run and click the Select Search button. (For more details, see "Running a Saved Search" on page 101.) The Calendar then displays the Payments found by the saved search.

The search details are listed here. They include the title of the saved search and the date criterion as determined by the current Calendar view.

After performing the saved search, you can move to another month, or from monthly to daily view. Payments matching the search parameters are displayed. The date information shown here changes accordingly.

Click Get Search again to perform a different saved search; the results of the first search will be cleared and the new results displayed.

Click Clear Search to clear the Calendar of all displayed Payments.

Using the Monthly View

Click the Monthly button to see your Calendar's monthly view. When you first access the calendar, it displays the Monthly view for the current month (according to your system clock); the current day is highlighted.

The Date Select toolbar indicates the month and year you are currently viewing.

You can also use the Date Select toolbar to view other months and years. Click the arrows around the month to move backward or forward a month. To move to the same month in another year, click the year arrows.

To return to the current month, click the Jump to Today button. The Calendar then displays the current month with the current day highlighted.

Using the Daily View

The Daily view displays detail of the Activities or Payments for the currently selected day. From the Daily view, you can modify Activities or Payments, mark Activities as Done or Payments as Paid, and create new Activities and Requirements.

To choose a day, use the Monthly view to get to the appropriate month. Click on the day you want to see, then click the Daily button. (You can also double-click on a day to open it in the Daily view.)

In the Daily view, the Date Select toolbar indicates the day you are currently viewing.

You can also use the Date Select toolbar to view other days. Click the arrows around the date to move backward or forward to other days. To return to the current day, click the Jump to Today button. The Calendar then displays the current day.

Working with Records in the Daily View

The Calendar's Daily view gives you several options for working with your Activities, Requirements, and Payments.

Note: To add or modify Activities and Requirements, you must be using the Activities Calendar. To modify Payments, switch to the Payments Calendar.

Modifying Activities and Requirements

To open an Activity or Requirement from the Daily view, highlight the record and select File ➤ Open. Once you have opened an Activity or Requirement, you can modify it:

- For information on modifying Activities, please see "Adding and Modifying Activities" on page 415.
- For information on modifying Requirements, please see "Adding and Modifying Grant Requirements" on page 333 and "Adding and Modifying Payment Requirements" on page 337.

You can also mark an Activity or Requirement as Done in the Daily Calendar. Highlight the record and select Action ➤ Mark as Done from the Calendar menu.

Adding Activities and Grant Requirements

To add a new Activity, select File ➤ New ➤ Activity from the Calendar menu.

To add a new Grant Requirement, select File ➤ New ➤ Grant Requirement from the Calendar menu.

In both cases, the date currently displayed in the Calendar is automatically entered as the new record's Due Date. You can change this date if you wish.

- For more information on adding an Activity, please see "Adding and Modifying Activities" on page 415.
- For more information on adding a Grant Requirement, please see "Adding and Modifying Grant Requirements" on page 333.

Tip: You can add a Payment Requirement directly from the Calendar. Open a Payment as described below, move to the Payment record's Requirements tab, and click New to open a new Payment Requirement. For more information on adding a Payment Requirement, please see "Adding and Modifying Payment Requirements" on page 337.

Modifying and Paying Payments

To open a Payment from the Daily view, highlight the record and select File ➤ Open. Once you have opened a Payment, you can modify it. For information on modifying Payments, please see "Creating and Modifying Payments" on page 271.

You can also pay a Payment from the Daily Calendar:

1. Highlight the record and click Action ➤ Mark as Paid from the Calendar menu.

   You are prompted to enter the date, the check number, and any notes regarding the payment. (The date currently displayed in the Calendar view is automatically entered as the date in this form, but you can change it.)

2. Enter the information and click OK. The Payment is marked as Paid.

   Note: In order to enter information about a Payment made by means of a wire transfer, you need to open the Payment.

Printing the Monthly Calendar

Using the following procedure, you can print the contents of the Monthly Calendar in exactly the format in which it is displayed:

1. In the Monthly view, choose the month you wish to view, the type of Calendar (Payments or Activities), the records you want to see, and whether or not to include Done Activities.

2 From the Main menu, select File ➤ Print. The Calendar is sent to your printer.

Printing the Daily Calendar

The Daily view can display a list of the day's events for all staff, for a specific user group, or for a specific staff member. You can print this list of Activities or Payments in the form of a report, and use the print options to:

- Adjust the width of items displayed in the grid
- Customize title and subtitle printed on the report
- Specify whether or not payment totals are printed

Formatting and Printing the Daily View

To print the Daily view:

1 Make sure that the information in the grid is displayed as you want it to look in your report. Go to the day that you want in the report, and then modify the width of the items in the grid. For more information, please refer to "Grid Displays" on page 22.

2 Highlight the records you want to include in the report.

3 Choose File ➤ Print from the Main menu. A preview of the report opens.

4 Click Print. The Daily view is printed.

Exporting from the Calendar to Outlook

You can export Requirements and To Do Activities from the Calendar to Microsoft Outlook. To Do Activities such as Site Visits and Meetings appear in Outlook as Appointments; Requirements are exported as Outlook Tasks.

Using the Monthly view, you can export all the Activities for a month at once, or for a single day during the month. Exporting from the Daily view allows you to select records for export from the list of the day's Activities.

Exporting from the Monthly View

You can use the Find or Get Search options to limit the Activities shown in the Calendar. Only Activities currently displayed are available to be exported.

To export Activities to Outlook from the Calendar's Monthly view:

1. Display the month for which you want to export Activities. If you are exporting Activities for only one day out of the month, highlight the date now.

   Note: You must highlight a day during the month when at least one Activity is scheduled, or the export feature is unavailable.

2. Select File ➤ Export to Outlook from the Calendar menu. The Export to Outlook window opens.

3. Set up your Outlook export options. First, determine which records you want to export:

   Select the 'Export all records' radio button to export all Activities for the month currently displayed. Select 'Export only selected records' to export the Activities for the day currently highlighted.

   If you want to export the Contact associated with each Activity, check the 'Include Contacts' check box.

4. Determine how you want the export to treat duplicate records and the Outlook folders to which you want your Activities sent.

   Note: For more details on setting up these important options, please see "Exporting Activities to Outlook" on page 428.

5. Click Export to run the export.

Exporting from the Daily View

You can use the Find or Get Search options to limit the Activities shown in the Calendar. Only Activities currently displayed are available to be exported.

To export Activities to Outlook from the Calendar's Daily view:

1. Display the day for which you want to export Activities. If you are exporting only some of the displayed records, highlight them now.

   Note: You can use the Find or Get Search options to limit the Activities shown in the Calendar. Only Activities currently displayed will be exported.

2. Select File ➤ Export to Outlook from the Calendar menu. The Export to Outlook window opens.

3. Set up your Outlook export options. First, determine which records you want to export:

   Select the 'Export all records' radio button to export all Activities for the date currently displayed. Select 'Export only selected records' to export only the Activities currently highlighted.

   If you want to export the Contact associated with each Activity, check the 'Include Contacts' check box.

4. Determine how you want the export to treat duplicate records and the Outlook folders to which you want your Activities sent.

   Note: For more details on setting up these important options, please see "Exporting Activities to Outlook" on page 428.

5. Click Export to run the export.

GIFTS Activities and Requirements in Outlook

When you export a GIFTS Activity to Outlook as an Appointment, you should be aware of how the Appointment will be scheduled, and what Activity data will be included. Please see "How GIFTS Activities are Scheduled in Outlook" on page 432.

GIFTS Requirements appear in Outlook as Tasks. For details on how Requirements are translated to Tasks, please see "How GIFTS Requirements are Scheduled in Outlook" on page 344.

Closing the Calendar

When you are finished working with the Calendar, choose File ➤ Close from the Main menu. You are returned to the GIFTS Organizer.

If you click the Organizer button while in Calendar, the Organizer is displayed—but the Calendar remains open in the background.

18 Working with Documents

This chapter describes how to view and manage documents that are linked to GIFTS. Documents are the word processor files from your merged correspondence, or—if you have the optional Document Manager—external documents that you link to GIFTS for easy reference.

In This Chapter

About Documents and Document Activities.....**472**

About the Documents Folder **472**

Searching for Documents.....**474**

Viewing and Editing Documents **475**

Editing Document Links **476**

Moving Documents.....**479**

Transferring Documents to Another Branch.....**480**

Removing Documents and Document Activities **481**

Locking and Unlocking Documents **482**

Using the Document Manager.....**484**

Linking a Batch of External Documents **489**

About Documents and Document Activities

The Documents folder stores the correspondence and write-ups you generate in GIFTS and keeps them available in relation to the record, such as a Request, with which they are associated. This enables you to reference your entire outgoing correspondence without having to look in your paper files.

If you are using the optional Document Manager, the Documents folder also stores external documents (such as spreadsheets or graphics) that you have linked to GIFTS.

Each document linked to GIFTS is linked by a *Document Activity* record that specifies its filename and the data in GIFTS—such as a Request and Organization—with which the document is associated.

About the Documents Folder

From the Documents folder of the Organizer, you can open documents that are linked to GIFTS. The following types of documents are available.

❖ **Mail:** merged correspondence created in GIFTS

- **Write-up:** merged write-ups created in GIFTS
- **External:** documents linked to GIFTS with the optional Document Manager

Note: If no document file is available for a Mail or Write-up Document, you can open the Document Activity record that was saved for the Mail or Write-up from the Documents folder.

By default, Documents are sorted by their date, descending from the most recent Documents. Documents with the same date are sorted alphabetically by the name of the Organization with which they are associated.

You can customize the format, content, and sort order of the information in the Organizer, as described in "Working with the Organizer" on page 37. The following default information is displayed in the Documents folder.

Column	Description
Locked Status	A padlock is displayed if the Document has been locked. If the lock is green, you can edit the Document. If it is red, you cannot.
What/When	The type of document (mail, write-up, or external) and the date on which the document was produced.
Title/Subject	The title of the document (the name of the letter or write-up template) and the subject, or Organization and Request with which it is associated.
Author	The user who created the document.
Reference	The Organization, Contact name and telephone number, Payment, and/or Request associated with the document.

Column	Description
File Name/Notes	Any notes entered by the user in regards to the document. If the word processor file was saved when the document was created, its filename is displayed.
Audit	The dates on which the record was created and last modified, and the Login IDs of the users that created and last modified the record.

The legend at the bottom of the screen indicates that documents appearing in blue are internal documents generated in GIFTS, while documents appearing in green are external documents attached with the optional Document Manager.

Searching for Documents

The most common way to view documents is to select the record with which it associated—such as a Request or Organization—and zoom in on it. Then, go to the Documents folder, where all of the documents associated with the record are displayed. However, you can also search for documents with Document folder's Quick Find.

This section details each of the Quick Find search properties for Documents. For more information about the Organizer search facilities, please refer to "Searching for Data in GIFTS" on page 77. There is no Advanced search in the Documents folder.

In the Documents folder, you can search on any combination of the following properties

Property	Description
Author	The author of the document. The name of the author is the staff member who was logged in when the letter or write-up was created or linked to GIFTS with the optional Document Manager.
Contact's Last Name	The last name of the Primary Contact of the record with which the document is associated.
Date	The date the document was created or linked to GIFTS with the optional Document Manager.
File Name	The file name of the document.
Keywords	Keywords entered for external documents linked to GIFTS with the optional Document Manager.
Organization ID	The ID of the Organization with which the document is associated.
Organization's Name	The Organization name associated with the record with which the document is associated.
Request ID	The ID of the Request with which the document is associated.
Requirement ID	The ID of the Requirement with which the document is associated.
Subject	The subject entered for External Documents linked to GIFTS with the optional Document Manager.
Title	The title of the document. For internal documents, this is the name of the letter or write-up template used to create the document. For External Documents, it is the title entered by the user who linked it.

Viewing and Editing Documents

You can view, edit, and reprint the merged letters and write-ups that you created and saved to disk. When you access the document, GIFTS opens your word processor (if it is not open already) and loads the document. You

then have all of the functionality normally available in your word processor to view, edit, or print the document.

If the lock icon is red, you cannot edit the document. For more information about Document locking, please refer to "Locking and Unlocking Documents" on page 482.

To access an existing document:

1. Locate the document in the Documents folder of the Organizer. The most common way is to select the record with which it associated—such as a Request or Organization—and zoom in on it. Then, go to the Documents folder, where all of the documents associated with the record are displayed.

2. Highlight the document and choose File ➤ Open from the Main menu.

   GIFTS opens the document within your word processor, where you can edit it as you would any word processor document.

If you are finished with your word processor, you may close and exit it. To return to GIFTS from within your word processor, you can press ALT+TAB or click the GIFTS icon in the Windows taskbar.

Editing Document Links

Documents are linked to GIFTS by their respective Document Activity records. Summary information about the document is included in the Activity record; if you wish to edit this information, you can open the Activity record from the Activities folder of the Organizer or from the Daily Calendar.

For example, you can change the description of the document or the file path (such as C:\GIFTS\Document\29120606.DOC) that links the document file to GIFTS.

Tip: If you want to change the location of documents linked to GIFTS, you can move the document files. For details, please see "Moving Documents" on page 479.

Note: The Documents folder provides access to the word processor file linked to GIFTS. The Activities folder provides access to the Document Activity record associated with each file.

To edit the Activity record for a document:

1. Locate the record to which the document is linked. The most common ways to view documents is to select the record with which it associated—such as a Request, Organization, or Activity—and zoom in on it. Then, go to the Activities folder, where the Activity records for the documents associated with the record are displayed.

   Note that you can also search for Document Activity records with the Activities Quick Find.

2 Highlight the Activity and choose File ➤ Open from the Main menu. GIFTS opens the Activity.

You can edit the following information:

Field	Description
Organization	The Organization with which the document is associated. To change the Organization, you can click the Find button to right of the Organization name.
Contact	The last name of the Contact associated with the document (by default, the Primary Contact for the Request).
Request ID	The Request ID of the request associated with the document. *You cannot edit this field*.
Payment ID	The Payment ID associated with the document, if any. *You cannot edit this field*.
Date	The date of the document.
File Name	The name of the word processor file to which the Document Activity is linked. If the link has been broken (for example, if the file was moved), you can click Browse for File to find the appropriate file and re-establish the link.
Title	The title of the document. For internal documents, this is the name of the letter or write-up template used to create the document.

Field	Description
Subject	The subject entered for external documents linked to GIFTS with the optional Document Manager.
Author	The author of the Document. The name of the author is the staff member who was logged in when the letter or write-up was created or linked to GIFTS with the optional Document Manager.
Keywords	Keywords entered for external documents linked to GIFTS with the optional Document Manager.
Notes	Any notes that apply to the document.
Shareable	Enable this field to allow other users to access this document.

3 When you are finished updating the Activity, click Save and Close to save your changes.

Moving Documents

If you want to relocate linked documents to another directory—perhaps you want to maintain all correspondence for the quarter in the same directory—you can use GIFTS to move them. When you move documents, GIFTS transfers them to the new location and automatically updates the links in their Document Activity records.

To move documents:

1 In the Documents folder, highlight the documents that you wish to move.

2 From the Main menu, choose Action ➤ Move Document. You are prompted to choose a destination for the documents.

3 Click OK. You are asked to confirm that you wish to move the documents.

4 Click Yes. The documents are moved. If you are moving a batch, the Process Log indicates the results of the batch operation. You can click Print or Save As to keep a copy of the log for your records.

Transferring Documents to Another Branch

If you are using branch security, you can transfer Documents *not* associated with a Request to another branch. (Documents associated with a Request will only be transferred to another branch when the Request itself is transferred.)

Who may transfer Documents to another branch depends on the branch security model you are using. These two models, based on decentralized data entry versus centralized data entry, are described in "About Branch Security" on page 238 of the *Administrator's Guide*.

- If you are using branch security for the decentralized data entry model, you must log in to GIFTS as a user in the Admin group.
- If you are using branch security for the centralized data entry model, you must log in to GIFTS as a user with permission to modify records from the branch associated with the Document or Documents. (This would include the Admin group.)

Transferring a Single Document to Another Branch

To transfer a single Document to another branch:

1. In the grid of the Organizer's Documents folder, highlight the Document you wish to transfer.
2. From the main menu, select Action ➤ Transfer Branch. (This menu item will not appear if you have selected a Document associated with a Request.)
3. Select the branch to which you wish to transfer the Document and click OK.

   A message opens you informing you that the Document has been transferred to the branch you selected.

Transferring a Batch of Documents to Another Branch

To transfer a batch of Documents:

1. In the Documents folder of the Organizer, display and highlight the Documents you wish to transfer.
2. From the main menu, select Action ➤ Transfer Branch.
3. Select the branch to which you wish to transfer the Documents and click OK. A process log opens, detailing the results of your batch transfer.

   Note: Documents associated with a Request are not transferred. Other Documents are transferred to the new branch.

Removing Documents and Document Activities

When you no longer want to maintain a document in GIFTS, you can remove the document and/or its corresponding document Activity record. This can be useful if you want to eliminate documents associated with projects that have already been funded or those from a previous fiscal year.

If you no longer need to access the document—but wish to maintain a record of it for your correspondence or reports—you can remove the document file but maintain the Document Activity record in GIFTS.

When you remove a document, it is moved to a /TEMP directory created under the directory that your Administrator specified for documents. The document file is not deleted from your system.

Conversely, if you want to remove a Document Activity record but wish to keep the document in its current location—perhaps the document is linked to another record in GIFTS—you can remove the Activity only.

To remove documents and/or Activities:

1. In the Documents folder, highlight the documents that you wish to remove.

2 From the menu, choose Action ➤ Remove Document. You are asked to choose which elements of the Document you want to remove.

- If you remove both the documents and their Activities, the documents are moved to the \TEMP directory and the Activity records that link the documents are removed from GIFTS.
- If you remove Activities only, the Document Activity records are removed from GIFTS but the documents remain unaffected.
- If you remove documents only, the documents are moved to the \TEMP directory and the Document Activity records remain for future reference and reporting.

3 Click OK to proceed with the removal. You are asked to confirm that you wish to remove the documents and/or Activities.

4 Click Yes. The documents and/or Activities are removed. If you are removing a batch, the Process Log indicates the results of the batch operation. You can click Print or Save As to keep a copy of the log for your records.

Note: Once documents are removed, your Administrator can purge them from the \TEMP directory. For details on purging documents, please see the *Administrator's Guide*.

Locking and Unlocking Documents

You can restrict access to Documents by locking them. When you lock a Document, other users can view and print, but not edit, the Document. For example, you can lock Documents while they are under development to prevent other users from editing them.

Locked Documents display the Lock icon in the Organizer. If the lock icon is red, you cannot edit the Document. If the icon is green, you can edit the locked documents because you either:

- Are a member of the Admin user group.
- Have the staff override permission and the Document is assigned to you.

You can also restrict access to a Request—and to the Documents associated with it—by locking the Request. For details, please refer to "Locking and Unlocking Requests" on page 235.

Locking Documents

To lock a Document or group of Documents:

1. In the Document folder of the Organizer, highlight the Documents you wish to lock.

2. From the Main menu, choose Action ➤ Lock. You are prompted to confirm that you want to lock the Documents.
3. Click Yes.

Tip: If the Locked column is not displayed in the left-most column of the Organizer grid, you can add it by choosing View ➤ Show Columns and clicking Reset Defaults.

Unlocking Documents

To unlock a Document or group of Documents:

1. In the Document folder of the Organizer, highlight the Documents you wish to unlock.

2. From the Main menu, choose Action ➤ Unlock. You are prompted to confirm that you want to unlock the Documents.
3. Click Yes.

Using the Document Manager

The optional Document Manager allows you to link documents created outside of GIFTS—such as spreadsheets, graphics, and presentations—with your grant tracking data. You can then search for and view external documents using the Documents folder of the Organizer—just as you view merged documents created from within GIFTS.

By default, external documents are displayed by the Outside In™ Document Viewer shipped with the Document Manager. Your Administrator can configure GIFTS to use other viewers—such as word processors, Internet browsers, and graphics-editing applications—to view specific file types. For more information, please refer to the *Administrator's Guide*.

Supported Document File Formats

The following summary lists many of the document formats supported by the Outside In Document Viewer. For a complete list, consult the GIFTS Compatibility Fact Sheet.

Your Administrator can configure GIFTS to launch alternate viewers that support additional file formats, as described in the *Administrator's Guide*.

Linking External Documents

To link an external document, you must know the path (such as C:\PROPOSALS\NEWU.DOC) to its location on your system.

To link an external document:

1. Locate the record with which you want to associate the document, and zoom in on it.
2. Go to the Organizer's Documents folder. The documents already associated with the record are displayed.

3 From the Main menu, choose Action ➤ Include Document.

You can enter the following information.

Field	Description
Organization	The Organization associated with document. (By default, the Organization associated with the record you zoomed in on.) To change the Organization, you can click the Find button to the right of the Organization name.
Contact	The Primary Contact associated with the document. (By default, the Primary Contact associated with the referenced Organization.) You can choose another Contact affiliated with the referenced Organization.
Request No.	The system-assigned ID of the Request with which this document is associated. *You cannot edit this field*.
Date	The date of the document.
File Name	The path of the document, including its filename. Note that if the document is located on your local workstation instead of a network drive, others users will not be able to access it. To choose a file on your system, click Browse for File and choose a file as you would in any Windows application. Note that you can use the Autoview option to view documents as you browse, or click View to see a specific document. For information about the document display options, see “Document Viewer Display Options” on page 487.

Field	Description
Title	The title of the document.
Subject	A short description of the subject of the document.
Author	The author of the document.
Keywords	Any keywords you wish to enter regarding the document. You can search for keywords with the Documents Quick Find.
Notes	Any notes you wish to make regarding this document. If you need more space, you can click the Long Notes tab to enter more notes.

4 When the information is complete, click Save and Close to link the document.

Tip: The steps above show you how to link one external document at a time. With proper preparation, you can link external documents by the batch. For more information, please see "Linking a Batch of External Documents" on page 489.

Viewing and Printing External Documents

When an external document has been linked, you can search for and view it from within GIFTS. This section explains how to view a document, and then details the display, printing, and clipboard options of the Outside In Document Viewer.

To view an external document:

1 Locate the document in the Documents folder of the Organizer. The most common way is to select the record with which it associated—such as a Request or Organization—and zoom in on it. Then, go to the Documents folder, where all of the documents associated with the record are displayed.

2 Highlight the Document and choose File ➤ Open from the Main menu.

GIFTS displays the document within the Outside In Document Viewer, or—if your Administrator has configured GIFTS to use another viewer to display documents—the document is displayed within the alternate viewer.

3 When you are finished viewing the document, click Cancel to close the Viewer.

Document Viewer Display Options

You can change the display options for the Outside In Document Viewer from the Viewer's toolbar. Note that the available options vary, depending on whether you are working with a text-based or graphics document.

You can:

- View a text document in Draft, Normal, or Preview mode.
- Control the size of a graphic in the viewer.
- Control the font used to display text-based documents: choose Action ➤ Font Size.
- Determine whether grid lines are displayed for database or spreadsheet documents: choose Options ➤ Display from the menu and then click More.

Printing Documents

To print the document, click the Print button or choose File ➤ Print from the menu. If you want to modify the print options, click Options in the Print window.

Change the Font, Header, and Margin information as desired. Click More to access additional print options for spreadsheet, database, graphic and drawing documents. Click OK to return to the viewer.

Clipboard Options

You can copy information from the document in the viewer into the Windows clipboard, and then paste it into other applications. To copy information, highlight what you wish to copy and press CTRL+C.

To modify the Clipboard options, click the right mouse button and choose Options ➤ Clipboard from the menu. The Clipboard Options are displayed, where you can:

- Choose what formats can be placed on the clipboard.
- Choose the default font sent to the clipboard when text-based information is copied.

In addition, you can click More for spreadsheet and database options. Click OK to return to the Outside In Document Viewer.

Linking a Batch of External Documents

If you use the Document Manager, and are asked to link batches of external documents fairly often, you may want to take advantage of the GIFTS batch linking facility.

The Batch Link Documents Wizard allows you to link each document in a batch to its related Organization or Request. If you have large numbers of documents related to GIFTS records, but created outside GIFTS, you can link them all at once, rather than creating one link at a time.

The scenario presented in this section is designed to provide an overview of the batch linking process, and to describe some factors that should be considered before you begin the process. For detailed instructions on using the Batch Link Documents Wizard, see "Performing a Batch Link" on page 493.

Processing a New Batch of External Documents

You receive a batch of Request-related documents from a program officer who is on an extended trip. You have two things you want to accomplish with these documents:

- To link each document file to the related Request record in GIFTS.
- To move the document files to the network, where other GIFTS users can access them.

The Batch Link Documents Wizard can perform both these functions if you prepare correctly.

Step 1: Placing Documents in a Temporary Directory

The documents may have arrived attached to an e-mail, saved on a floppy disk, or by some other method. Regardless, the first thing you should do is copy the files to a temporary directory on your workstation. In this case, a 'temporary' directory means a directory where the files will be saved temporarily, before the Wizard moves them to the network permanently.

Because the Wizard attempts to link every file found in a given directory, this directory should contain only files you want the Wizard to link. The value of the temporary directory is that it prevents duplicate links being created for the same file.

For example, if you copied the new batch of documents to a network directory containing files that have already been linked, the Wizard will create new links for *all* files meeting your specifications, even if links for those files already exist. This creates unnecessary additional document Activity records in your GIFTS system.

Note: You are not required to place a new batch in a temporary directory, then move them to a permanent directory as they are linked. This is especially true if you plan to place each batch in its own permanent directory (rather than mix documents from different batches together). You can copy the new batch to its permanent directory first thing, and tell the Wizard to leave them there after linking.

Step 2: Determining the File Naming Convention

The Batch Link Documents Wizard uses each document's file name to determine the GIFTS record to which it should be attached. For this reason, it is important that all files in a batch follow the same naming convention. You should determine this convention before you begin linking.

Open the temporary directory where your new batch of documents is located, and look for the convention used in the file names. There are four elements to each naming convention that you should note:

Prefix The Prefix consists of characters in the file name that proceed the Identifier (defined below). For example, names of document files concerning historical grants might have 'HIST' as a Prefix, as in HIST1024.doc.

The Prefix is optional. If the file naming convention of a batch does not include a Prefix, you can leave that field blank in the Wizard.

Identifier The Identifier is the most important of the four naming convention elements. The Identifier indicates the GIFTS record to which you wish to link the document:

- If you are linking to an Organization, the Identifier should be the Organization ID.
- If you are linking to a Request (as we are in this scenario), the Identifier should be either the Request ID or the Request's Reference Number.

The Identifier, for obvious reasons, must be part of any file naming convention. In the Wizard, you will indicate which of the three types of Identifiers currently being used: The Organization ID, Request ID, or Request Reference Number.

Suffix The Suffix consists of characters in the file name that follow the Identifier. For example, names of document files sent to you by a program officer might have that officer's initials as a suffix, as in HIST1024CR.doc.

The Suffix is optional. If the file naming convention of a batch does not include a Suffix, you can leave that field blank in the Wizard.

File Extension The File Extension indicates the kind of files being linked (e.g., .pdf for Portable Document Format files, .doc for MS Word files). You may only create links for one kind of document file at a time. Therefore, entering the file extension is required by the Batch Link Documents Wizard.

Once you have opened the temporary directory and noted all four elements of the file naming convention, take a moment to make sure that the file names are all thoroughly consistent with one another.

For example, a program officer using her initials as a file name Suffix may have accidentally included her middle initial for one file only. Before closing the temporary directory and continuing with the linking process, you can rename the file, deleting the extra initial.

While you are checking the file names, you may also discover that there are two or more kinds of documents included, and therefore two or more different naming conventions. Rather than renaming all the files, note each different naming convention. In this case, you will need to run the Batch Link Documents Wizard once for each naming convention. The Wizard will ignore files in a directory that do not match the naming convention you have indicated, leaving these files, unlinked and unmoved, in the temporary directory. You can then run the Wizard again, entering the new convention.

Tip: Individuals sending you batches will use their own naming conventions, hopefully on a consistent basis. However, if you will be receiving batches regularly, you may want to define your own naming convention and ask them to follow it.

Step 3: Choosing the Permanent Network Directory

The Batch Link Documents Wizard can not only link the documents to their related GIFTS records, it can also move them from the temporary directory to the network directory where other users can access them. Determine the path to the desired directory, then enter it as you proceed through the Wizard.

Note: The Wizard will copy a document file to this destination directory if and only if it has been successfully linked to a GIFTS record. Otherwise, the file remains in the temporary directory only. You can choose to have the Wizard automatically remove successfully linked and saved files from the temporary directory. This allows you to reopen the temporary directory after running the Wizard and see which files, if any, were unsuccessfully linked and left behind.

You should also note that the Wizard will not link or move a file when another file of the same name is found in the destination directory. In this case, you may want to either edit the file name, or choose a different destination directory on the network.

Recap of Batch Link Preparation

You are ready to open the Batch Link Documents Wizard and begin batch linking if:

- Your new batch of external documents has been copied to a temporary or permanent directory.
- You have noted all four elements of the file naming convention in use, and checked for consistency in all batch file names.

❖ A network directory accessible by other GIFTS users has been chosen as a destination for your files, if applicable.

Performing a Batch Link

To open the Batch Link Documents Wizard, go to the Documents tab in the GIFTS Organizer and follow the steps below:

1 Select Action ➤ Batch Link Documents. The Batch Link Documents Wizard opens:

2 Indicate whether you are linking documents to Organizations or Requests, then click Next. Page two of the Wizard opens:

3 On the second page of the Wizard, you should indicate the temporary directory where your batched documents can be found. If there is another directory you want to use as a permanent location, you indicate it here as well:

- To fill in the Current Document Path field, click Browse and indicate the directory where the external documents batch is currently located.

  If you want to move the documents to a new directory during linking, check the 'Move documents to this directory' check box. The next field will then be available:

- Click the Browse button next to the New Document Directory field to indicate the folder where you want to save the files after they are linked. This directory should be found on your network, where other GIFTS users can access the documents.

  Check the 'Delete files from source directory' check box if you want to remove successfully linked documents from your temporary directory. Only files successfully linked and moved to the network will be deleted.

In this example, we are moving external document files from a temporary directory to a directory created for this batch:

After indicating the source directory and any new destination for your documents, click Next to continue. Page three of the Wizard opens:

4 On page three of the Wizard, you should enter the elements of your file naming convention: Prefix, Identifier, Suffix, and File Extension. The Example field at the bottom of page three displays the resulting file name format.

In this example, the naming convention includes no Prefix. The Request ID serves as the Identifier, and the Suffix 'CR' is being used to indicate the author's initials. The documents are MS Word files. 305CR.doc is one of the files, a Word document relating to a grant with the Request ID '305.'

After the fields are correctly filled in, page three of the Wizard appears as follows:

Once you have set up the Wizard to follow your file naming convention, click Next. Page four of the Wizard opens:

5 On the fourth page of the Batch Link Documents Wizard, you can enter optional information you want included in the resulting Activity record. You can also choose to lock all linked documents by checking the 'Lock documents after linking?' check box.

Click Finish. A prompt reiterates your linking criteria and asks you if you want to continue. Click Yes. The results of your batch linking appears:

The process monitor shown above indicates the total Activity records created, that is, the number of documents in the directory you indicated that were linked successfully to an Organization or Request. It also notes any failed problems that occurred during batch linking.

Troubleshooting

After running the Batch Link Documents Wizard, you can use the information reported in the process monitor to help you troubleshoot your

batch linking. The data listed will include the number of successful links, file names already found in your destination directory, and other unsuccessful link attempts.

Let's take another look at the results of the example summary above:

- Lines 1 and 2 indicate two file names that existed previously in the destination directory. Because the Batch Link Documents Wizard found files by those names already there, it did not attempt to link or move the documents.

  If these are distinct documents with the same name, you will need to link these two files within another directory, or change their files names. You could add a Prefix or edit the Suffix of the file name, then rerun the Wizard. (As long the Identifier remains the same, it will link to the correct Request or Organization.)

- Line 3, "Total Activity records created," indicates the number of files successfully linked and, if you requested, moved to a new directory. (An Activity record constitutes the link to the external document.) If the number listed at this heading doesn't match the number of files that were in your batch, check the file names of your batch documents.

  Example: If a file name does not match the naming convention (e.g., a file name ends with the Suffix 'CMR' instead of the designated 'CR'), this will *not* be indicated in the summary. The Batch Link Documents Wizard simply disregards file names not matching the defined naming convention. Checking the number of successful links against the number of files in your batch can help you catch such problems.

- Line 4 indicates the number of documents that *did* match the naming convention but were nevertheless not linked to any Request or

Organization. This indicates that the Identifier in the file name does not correspond to any record in your GIFTS system.

Example: The file 319CR.doc was named under a naming convention using Request ID as the Identifier. However, no Request record with the Request ID of '319' exists in your GIFTS database. There is nothing to which the Wizard can link this file.

5 Reporting from the Organizer

This chapter describes how to print and export ad hoc reports from the GIFTS Organizer.

In This Chapter

About Organizer Reporting **500**

Setting Up and Running Ad Hoc Reports **502**

Setting the Print Options **503**

Changing a Report's Type **522**

Running Reports **527**

The Active Reports Viewer **528**

Saving an Ad Hoc Report **531**

Modifying a Saved Organizer Report **533**

Deleting a Saved Organizer Report **534**

About Organizer Reporting

Important: The information in this chapter only applies to users running a full version of GIFTS. Essential GIFTS users should refer to the next chapter for detailed reporting information.

The GIFTS Organizer is a flexible tool for displaying information on-screen, but it is also a powerful reporting tool. You can create ad hoc reports simply by printing the information displayed in the Organizer, or you can use the advanced reporting features built into the system to create the custom look you want. Once you have a report set up, you can add it to your Report Library as a saved Organizer report so you can quickly run updated versions in the future.

Ad hoc and saved Organizer reports are formatted using Active Reports. Active Reports is a highly versatile tool that allows you to format entire report sections or individual report elements to create the right look for every need. For details on previewing reports in the Active Reports viewer, refer to "Running Reports" on page 527.

Tip: Your GIFTS administrator may have set global formatting options for your ad hoc reports. These settings are used as defaults by the system whenever you run an ad hoc report. It may be a good idea to run your reports with these formatting settings in order to speed up your reporting and create uniform reports within your organization.

Organizer Report Types

When you create an ad hoc report from the Organizer, you may choose between the following report types:

- **Detail**—This type of report displays data for each individual record in its own row. Detail reports may be very long, depending on the number of records included. This is the default report type that will be selected when you first access the Organizer printing options.
- **Summary**—This type of report provides group headings and subtotals rather than details for individual records. Summary reports are useful

when group activity is more important than record-level detail, such as in trend reporting.

- **Top *N***—This type of report is similar to a detail report in that individual records are represented. The difference is that this type of report displays only the top (or bottom) *N* records (*N* is a variable number of records that you define for each report).

Saved Organizer Reports vs. Saved Views

It is helpful to understand the differences between saved Organizer reports and saved Views when deciding how to organize, display, print, and share your GIFTS data. A brief description of each follows:

- **Saved Organizer Report**—A set of advanced printing options and search properties that are saved as a unit. Since they are accessed through the Report Library, saved Organizer reports may be run from any Organizer tab, with no setup needed in the Organizer. Once an Organizer report is saved to the Report Library, it *will not* be affected by changes to any views or searches used to create the report. Running a saved Organizer report will not change the view in the Organizer.

- **Saved View**—A set of Organizer display options and search properties that can only be applied on the appropriate Organizer tab. A saved View is intended to simply display records in the Organizer in a designated layout. It may also be used as the starting point for an ad hoc report, but you will need to configure the advanced printing options at each run time. If you run the same reports often, it is much more efficient to create saved Organizer reports. You can apply different Views to a saved Organizer report without affecting its criteria.

Setting Up and Running Ad Hoc Reports

The following steps outline the process of setting up, printing, and saving an ad hoc report from the GIFTS Organizer. Where applicable, the steps refer to the sections in this manual that provide more detailed information.

1 Select the Records You Want to Include

In most cases, you want to limit the amount of data included in your report. You can use Quick Find, an Advanced search, or your saved searches to specify the search criteria that limit the data included in the report. For more information, see "Searching for Data in GIFTS" on page 77.

Tip: You can also select specific Organizer records that you want to include by holding down CTRL or SHIFT as you click them.

2 Set the Print Options

The print options allow you to control all aspects of the report, including columns, sorting, grouping, formatting, and page layout. You can also specify whether totals and subtotals are included, change the report type, and save the report to your Report Library for future use. From the Main menu, choose File ➤ Print to configure the print options described in "Setting the Print Options" on page 503.

3 Preview, Print, and Save the Report

From the Print Setup form, choose File ➤ Preview Report or File ➤ Print Report to preview or print the report. You may also choose File ➤ Save To Report Library to save the ad hoc report as a new Organizer report. For more information on previewing a report, see "Running Reports" on page 527.

Setting the Print Options

Once you have the appropriate records selected in the Organizer, you are ready to set up your ad hoc report. To set the print options, choose File ➤ Print from the Main menu. The Print Setup form opens:

Tip: Your administrator may have set up formatting defaults for your ad hoc reports, which will be reflected on the Print Setup form. If you would like to restore these settings at any point, choose Tools ➤ Reset to Global Formatting. You can also restore the settings for the last ad hoc report you ran by choosing Tools ➤ Revert to last ad hoc. This will include that report's columns, sort options, and so on.

Report Type and Print Options The three types of Organizer reports—Detail, Summary, and Top *N*—are described in "Organizer Report Types" on page 500. When you change report type, tab order and available options may change as well. The following information about Print Setup tabs indicates which options are available for different report types.

Caution: If you change a report to a different type, options that you have configured which are not available for the new report type will be lost. (For details, please see "Changing a Report's Type" on page 522.) In case you need to revert to the original report type, you should save a copy of the report before changing its type.

Saved Organizer Reports and Print Options The print options available may also change depending on whether you are creating a new ad hoc report, or modifying the print settings for an Organizer report saved to your GIFT Report Library. These differences are noted below as well.

Report Options Tab

On the Report Options tab, you will set up a number of general options for the report:

Prompt	Description
Title	Enter a title for the report.
Subtitle 1	Enter a primary subtitle for the report.
Subtitle 2	Enter a secondary subtitle for the report.
Footer Text	Enter text that will be placed in the footer section of the report.
NOTE: The following four options appear only for Top N *reports.*	
Return first ## records	Use this option to select the number of records to be displayed in the report. If the report is being sorted in ascending order, you are indicating the bottom ## records. If the report is being sorted in descending order, you are indicating the top ## records.
Print Subtotals	Select this option to include subtotals. NOTE: Subtotals in top *N* reports include *only those records in the actual report*, which may not be the same as the number of records in your selected Print Range (on the Report Options tab).

Prompt	Description
Subtotal Lines	Use this drop-down to select whether or not subtotals should be set off with rule lines in the report. You may choose to have lines above the subtotals, below the subtotals, or both.
Include record counts	Select this option to include a record count in the subtotal line.
NOTE: The following two options appear for all report types.	
Grand Totals*	This frame includes the following options: ❖ Select "Include Grand Totals" to display grand totals in the report. ❖ Use the "Grand Total Lines" drop-down to select whether lines should appear above or below the grand totals, or both. ❖ Select "Include record counts" to display record counts as part of the grand totals in the report. *(NOTE: This option is not available for Summary reports.)*
Print Range	*NOTE: Print Range appears only when you are creating a new ad hoc report in the GIFTS Organizer.* Use the option buttons in this frame to indicate whether the report should include all records in the Organizer, or only those that are highlighted.
NOTE: The next two options appear only when you working with an Organizer report saved to the Report Library.	
Availability Options	This frame includes the following options: ❖ Select "Mark this report as 'read-only'" to lock the report options so that other users may not alter the report at runtime. ❖ Select "Make this report available to all users" to allow other users to run the report.
Search Criteria	*Read-only.* Displays the search criteria that are currently applied to the report. To add a search or change the current search, click Edit/New Search in the toolbar.

* Grand totals in top *N* reports are totals for *all records in your selected Print Range (on the Report Options tab) at the time of the report*, which may not be the same as the number of records in the actual report.

Columns Tab

On the Columns tab, you will select the columns to be included on the report.

- *In Detail and Top N reports*, the Columns tab appears second, before the Grouping/Sorting tab.
- *In Summary reports*, the Columns tab comes third, following the Grouping tab. Note also that group headings are combined into a single column, which cannot be separated or combined with yet other columns.

The first thing you will need to do is select the columns that will make up the body of the report:

The "Available Columns" list includes all columns that may be added to the report. The columns listed here are determined by your choice of record type in the "Select available columns from" field below the list.

To add one or more of these columns to the report, highlight the columns in this list and click the Include button to the right.

The "Include these fields in this order" list includes all columns that have already been added to the report. Columns are numbered according to their order on the report, from left to right. To change the location of a column, highlight the column in this list and click either the Move Up or Move Down button below.

To remove one or more columns from the report, highlight the columns in this list and click the Remove button to the left.

Once you have added the appropriate columns to the report, you may use the settings in the Options section of the form to configure the content of each column. Display options (fonts, colors, etc.) for columns are similar to those in the Organizer (please see "Working with the Organizer Columns" on page 49 for details).

There are some key differences in the formatting toolbar, however, as shown in this illustration:

Combine and Separate columns using these buttons, just as you would in Show Columns in the Organizer.

Unlike in the Organizer, however, independent elements in a combined column *can* be formatted differently, as long as you use a carriage return as the delimiter.

You can select a column in the grid, then indent that column on the report. Each click decreases or increases the indent by one tenth of an inch. The amount of the indent for a column is shown in the left side of the Formatting section, next to the Column Data Format field label.

The Formatting section below will change based on the kind of column selected in the "Include these fields in this order" section above (much as it does in Show Columns in the Organizer). The options on the left are standard, available for all columns. On the right are options specific to the data type the field contains. (Some kinds, such as text fields, have no special options.)

In the example above, a column containing currency data (Organization:Last Grant Amount) is selected. On the right side of the Formatting section, a series of currency-specific options appear.

The tables below describe the special formatting options available for each kind of data.

Standard Options—The following options are available for all columns. They appear on the left side of the Formatting section:

Option	Description
Column Heading	Enter a heading to appear on the column in the report.
Column Data Format	*Read-only.* This field displays a preview of your column formatting, using the name of the column as sample text.
Data Prefix	You can use this option to indicate fixed text that should precede each value in this column.
Data Suffix	You can use this option to indicate fixed text that should follow each value in this column.

Date Column Options—If the column you are working with contains date values, a "Date Format" option allows you to choose from a drop-down list of standard date formats. "Short Date" and "Long Date" options in this menu display the short and long date formats specified by your Windows Regional Settings.

Currency Column Options—If the column you are working with contains currency values, the following additional options are available:

Option	Description
Decimal places	Use this drop-down to indicate the number of decimal places to display, from 0 to 4.
Negative number format	Use this drop-down to select a format for negative numbers from: ❖ The first option will be one thousand dollars displayed in the negative number format indicated by your workstation's Windows Regional Settings. ❖ ($1000.00) ❖ $1000.00 [the positive number format indicated by your Windows regional settings]
Display negative values in red	Select this option to display negative values in a red font.
Don't display currency symbol	Select this option to hide the applicable currency symbol.
Include grouping character	Select this option to display the appropriate grouping character (e.g., the comma in $1,000.00) for the values in the column. (Note: The grouping character is determined by your Windows regional settings.)
Include in totals	Select this option to include the values in the currently highlighted column in any subtotals or grand totals.
Include percentage of total	Select this option to add a new column after the currently highlighted column. The new column will indicate the percentage of the grand total that each record accounts for.

Coding Sheet Column Options—If the column you are working with contains coding sheet data, the following additional options are available:

Option	Description
NOTE: The first three options appear only if the Coding Sheet column contains a multiple-level code table.	
Code level to display	Use this drop-down to indicate which code level to display, from 1 to 5.
Show parent codes	Select this option to display the entire coding hierarchy, rather than just the code from the selected level.
Delimiter between levels	If you selected "Show parent codes" above, use this drop-down to select a delimiter, or to supply another not shown. The delimiter (i.e., separator) is used between code levels.
NOTE: The next two options appear only if the Coding Sheet column contains a code table allowing multiple codes to be selected.	
Primary/Secondary Codes	Use this drop-down to indicate whether the display should include primary codes, secondary codes, or both.
Delimiter between codes	If you selected to display both primary and secondary codes in the option above, use this drop-down to select a delimiter, or to supply another not shown.
NOTE: The last option appears for all Coding Sheet columns.	
Display Code/ Description	Use this drop-down to indicate whether the display should include the Code value, the Description value, or both. *(For details on system coding, please refer to the* GIFTS Administrator's Guide.*)*

Example: If you select code level 3 with parent codes displayed and the back slash as the delimiter, the Geographical Area Served of a Request might be displayed as "Northeast\New York\New York City." If you choose to display code level 2 with parent codes (with the same delimiter) *and* to include the secondary code delimited by a comma, the same Request's Geographical Area Served might be displayed as "Northeast\New York,Northeast."

Number Column Options—If the column you are working with contains numerical values, the following additional options are available:

Option	Description
Decimal Places	Use this drop-down to indicate the number of decimal places to display, from 0–4. NOTE: This option is not available if the number column is an *integer* column specifically. Integers by definition can have not decimal places.
Include grouping character	Select this option to display the appropriate grouping character (e.g., the comma in 1,000.00). (Note: The grouping character is determined by your Windows regional settings.)
Include in totals	Select this option to include the values in the currently highlighted column in any subtotals or grand totals.
Include percentage of total	Select this option to add a new column after the currently highlighted column. The new column will indicate the percentage of the grand total that each record accounts for.

Element of a Combined Column Options—If you have selected one element of a combined column, a "Trailing Delimiter" option allows you to indicate the delimiter to use after the selected element in the combined column.

Calculated Values Column Options—A number of columns display calculated values (e.g., Total Number of Affiliations, found in the Organizations folder). These columns will show the formatting options available for the type of data they calculate. For example, Total Number of Affiliations returns an integer; the number formatting options appear when you select this column.

In addition, search criteria can be appended to a calculated column. Create or edit a search by clicking the Find button in the Print Setup window

toolbar; the criteria you establish will appear in the Search Criteria selection below the formatting options:

If you append search criteria to a calculated column, you may want to edit the column heading to indicate the criteria.

In this case, for example, you will likely change the column heading to something like "Total Number of Payments of at least $5,000".

Other buttons on the toolbar allow you to select a saved search, or to clear the search criteria completely.

990 Reporting Columns

To allow users to create 990 reports which meet changing IRS standards, five new 990 related columns can be added to 990 Report or a new Request ad-hoc report as calculated columns. This will enable users to update the reports to match changing IRS requirements and customize it to their needs.

For Requests, the columns available include:

- Amended
- Amount paid
- Beginning balance
- Ending balance

- Newly allocated

These IRS 990 calculated columns will have the ability to be combined with other columns in ad-hoc reports, just like existing columns.

No search filters will allowed to be applied to these columns.

Users will simply perform a Request search, then click Print. The Columns tab on the Print Requests form will have the new columns listed under Available Columns.

When added to an Ad-hoc report and Previewed or Printed, the calculations will be made for the current fiscal year by default. The report can also be saved to the Report library.

When a user runs the report from the Report library, there will be an option to set an 'As Of Date', if desired in the Run Report window. This date will decide what Fiscal year the columns are calculated for.

Column	Description
Beginning Balance	This column shows the unpaid balance of the approved Request at the beginning of the "current" fiscal year (based on the 'As of date'). It is calculated as follows: "If the Request was approved during the current fiscal year, the beginning balance is zero ($0.00). (The grant amount will be included in the Newly Allocated column.) "If the Request was approved before the "current" fiscal year, the beginning balance is the original grant amount plus the amount of any grant amendments made before the current fiscal year minus the total amount of any Payments made before the current fiscal year. (The total amount of any grant amendments made during the current fiscal year will be included in the Amended column.)
Newly Allocated	If the Request was approved during the current fiscal year, the original grant amount is shown here. Otherwise, the Newly Allocated amount is zero ($0.00).

Column	Description
Amended	The sum of the amounts of all grant amendments made during the current fiscal year. If the Request had no grant amendments made during the current fiscal year, the Amended amount is zero ($0.00).
Amount Paid	The sum of the amounts of all paid, refunded, and voided Payments that meet the following criteria: "The Fiscal Year of the Payment is the "current" fiscal year. "The Payment Date falls before the report's "as of" date.
Ending Balance	The sum of the amounts of all paid, refunded, and voided Payments that meet the following criteria: "The Fiscal Year of the Payment is the "current" fiscal year. "The Payment Date falls before the report's "as of" date.

Sorting and/or Grouping Tabs

This tab of the Print Setup window is different for each report type—Detail, Summary, and Top *N*. The differences reflect the needs of the report type in question:

- *For Detail Reports*—Detail type reports offer both sorting and grouping options in this tab.
- *For Summary Reports*—The tab is called Grouping, and it appears second (between Report Options and Columns). This reflects the importance of grouping in summary reports.
- *For Top* N *Reports*—Here the tab resumes its third position in the Print Setup window, but is now labeled Sorting. No grouping options are available.

Options available on the tab vary for report type. This section covers all sets of options, noting those which are available only for certain types.

On the Sorting/Grouping tab, you will set up the sorting and grouping properties for the report. The first thing you will need to do is select the sort fields and the sort order of the report:

The "Available Sorts" list includes all fields that may be used to sort the report contents. The fields listed here are determined by your choice of record type in the "Select available fields from" drop-down below the list.

To add one of these fields to the report's sort order, highlight the field in this list and click the Include button to the right.

The "Sort on these fields in this order" list includes all fields that the report will be sorted on. To change the sort order of a field, highlight the field in this list and click either the Move Up or Move Down button below.

To remove a field from the sort order, highlight the field in this list and click the Remove button to the left.

Summary reports only show subtotals at the lowest level (where they are required), so these two options do not appear for Summary report type.

The grouping options displayed here change, based on the kind of data displayed by the sort column currently selected.

Once you have established sort fields for the report, you should set the options in the following sections:

❖ **Sort Options**—For each field that the report will be sorted on, you will need to set the following options:

Option	Description
Order	In this drop-down menu, select whether records sorted on this level are displayed in ascending (A-Z, 0-9) or descending (Z-A, 9-0) order.
Sort text as number	*Only available for certain text fields*. Select this option to normalize values in this field with zeros before sorting (e.g., 1, 3, and 10 would sort as 01, 03, and 10). For details on this option, please refer to "Sorting Text As Numbers" on page 517.

Important: These sort options appear for all three types of reports—Detail, Summary, and Top *N*.

❖ **Group Options**—Select the Group check box in Detail type report print options to use the grouping options described below. (For Summary type reports, grouping is always selected—and required.)

Note: Grouping options are *not* available for Top *N* reports.

For each field that the report will be grouped on, set the following options:

Option	Description
New page on break	Select this option to insert a page break before every new grouping value.
Print group heading	*Not available for Summary reports.* Select this option to insert a group heading each time the grouping value changes.
Repeat heading per page	Select this option to have the headings for multi-page groups repeated on the top of each page.
Print subtotals	Select this option to include subtotals for the group.
Include record counts	*For Detail reports only.* Select this option to include a record count in the group subtotal line.
Subtotal lines	*For Detail reports only.* Use this drop-down to select whether or not subtotals should be set off with rule lines in the report. You may choose to have lines above the subtotals, below the subtotals, or both.
Group header format	*Read-only.* This field displays a preview of your group heading formatting, using the name of the currently selected field as sample text.
Group heading text	*Only available if grouping on Organization ID, Request ID, Contact ID, or Donor ID.* Use this drop-down to select an alternative value to be used as a group heading.

In addition to the standard Group Options, the following options are available based on the type of data in the selected field:

Date Fields

Option	Description
Group By	Use this drop-down to indicate whether the group should be established by Day, Month, Quarter, or Year
Date Format	Use this drop-down to indicate the format for the date values in this group. The choices available will depend on your "Group By" selection.

Option	Description
Date Method	Use this drop-down to determine whether this grouping will be based on the Calendar Year or the Fiscal Year. *NOTE: Only available if you are grouping by quarter or year. Note that "fiscal year" and "current year" are not necessarily the same.*

Currency Fields

Option	Description
Decimal places	Use this drop-down to indicate the number of decimal places to display, from 0–4.
Negative number format	Use this drop-down to select a format for negative numbers from the following choices: ❖ The first option will be one thousand dollars displayed in the negative number format indicated by your workstation's Windows Regional Settings. ❖ ($1000.00) ❖ $1000.00 [the positive number format indicated by your Windows regional settings]
Display negative values in red	Select this option to display negative values in a red font.
Don't display currency symbol	Select this option to suppress the applicable currency symbol in the report.
Include grouping character	Select this option to display an appropriate grouping character (e.g., the comma in $1,000.00). (Note: The grouping character is determined by your WindoWs Regional Settings.)

Coding Sheet Fields

Note: When grouping by code, only the table's primary code is used.

Option	Description
Show parent codes	*Not available if the group is based on Level 1 of a Code Table.* Select this option to display the entire coding hierarchy, rather than just the code from the selected level.
Delimiter between levels	Use this drop-down to select the delimiter (i.e., separator) to be used between code levels. You may also enter a delimiter manually if it is not listed.

Option	Description
Display code/ description	Use this drop-down to determine whether the display should include the Code value, the Description value, or both. *(For details on system coding, please refer to the* GIFTS Administrator's Guide.*)*

Number Fields

Option	Description
Decimal Places	Use this drop-down to indicate the number of decimal places to display, from 0 to 4. NOTE: This option is not available if the number column is an *integer* column specifically. Integers by definition can have not decimal places.
Include grouping character	Select this option to display the appropriate grouping character (e.g., the comma in 1,000.00). (Note: The grouping character is determined by your Windows regional settings.)

Sorting Text As Numbers

A special option to "Sort text as numbers" will be available if you have selected one of the following fields as a sort value:

- Code value of any Coding Sheet
- Contact ID
- Donor ID
- Organization ID
- Organization Tax ID
- Organization Vendor Number
- Payment Check Number
- Request Docket Number
- Request ID
- Request Reference Number

Selecting this option will change the way in which the values in the selected field are "seen" by the system during the sort. Specifically, values will have zeros added in front of them to create a uniform number of characters for each value.

Example: If the values 1, 3, and 10 are being sorted in ascending order without this option selected, the system will return 1, 10, 3. This is because the system is sorting by the first character for each value. If you select this option, the system will see the values as 01, 03, and 10, so it will correctly return 1, 3, 10.

Important: If the values in the selected field contain alphabetic characters, this option may produce incorrect sorts. For example, turning the option on would make the system recognize the values AC and B as AC and 0B. The resulting sort order would be 0B, AC since zero comes before A when alphabetizing.

Page Setup Tab

Use the options on the Page Setup tab to configure the report's layout and the placement of certain report elements. Available options are organized into the following sections:

- **Paper/Layout**—Use the Portrait and Landscape option buttons to select the orientation for the report. The Paper Size field drop-down list allows you to select one of many standard paper sizes for the report.
- **Margins**—Use the options in this section to indicate the blank margins around the perimeter of the report. You may choose to express margin sizes in either inches or centimeters.
- **Report Date**—You may choose to have the report indicate the date on which it was run. The options in this section are as follows:

Option	Description
Placement	Use this option to determine whether the report should indicate a report date and, if so, whether the date should appear in the header or footer.
Alignment	Use this option to determine whether the report date should appear left, right, or center aligned in the header/footer.

Option	Description
Date Format	Allows you to choose a format for the report date from a short list of standard date formats.

- **Page Numbers**—You may choose to have page numbers included on the report. The options in this section are as follows:

Option	Description
Placement	Use this option to determine whether the report should include page numbers and, if so, whether the numbers should appear in the header or footer
Alignment	Use this option to determine whether the page numbers should appear left, right, or center aligned in the header/footer.
Format	Allows you to choose a format for the page numbers from a short list of standard numbering formats.

- **Header and Footer** —This section allows you to determine which of the following text elements should be included on every page of a report, rather than only on the first page:
  - Title
  - Subtitle 1
  - Subtitle 2
  - Footer Text
  - Report Date
  - Page Numbers

Design Tab

The Design tab allows you to set text and border formatting for the report. The Active Reports viewer on this form displays the first one or two records

selected for the report, so you can manipulate the formatting and view your results:

To begin setting your report formatting defaults, do one of the following:

- Click the element you want to change in the preview pane; it will be highlighted, and the name of the element will appear in the Text Element field.

  Note: To select multiple elements in the preview pane, hold down the CTRL key as you click on them with the mouse pointer.

- Using the **Text Element** drop-down list, select a specific text element to format. The text element chosen will appear in the preview pane, where it may be edited. The text elements vary, appearing only if they are actually in the report. The complete list is:

  - Column Headings
  - Footer Text
  - Grand Total Labels
  - Grand Total Record Counts
  - Grand Totals
  - Group 4 Subtotal Label[1,2]
  - Group 4 Subtotal[1,2]
  - Group 5 Heading[1,2]
  - Group 5 Subtotal Label[1,2]
  - Group 5 Subtotal[1,2]

- Group 1 Heading[1,2]
- Group 1 Subtotal Label[1,2]
- Group 1 Subtotal[1,2]
- Group 2 Heading[1,2]
- Group 2 Subtotal Label[1,2]
- Group 2 Subtotal[1,2]
- Group 3 Heading[1,2]
- Group 3 Subtotal Label[1,2]
- Group 3 Subtotal[1,2]
- Group 4 Heading[1,2]
- Page Numbers
- Report Data
- Report Date
- Subtitle 1
- Subtitle 2
- Subtotal Label
- Subtotals[3]
- Title

[1,2] Only available for detail and summary reports.
[3] Only available for top *N* reports.

- Using the **Report Section** drop-down list, select an entire section of the report that will share format settings. The following table lists the report sections available, along with the text elements contained in each section:

Report Section	Text elements contained within
Column Header	Column Headings
Footer	Footer Text, Report Date*, Page Numbers* **(depends on settings from Page Setup tab)*
Grand Totals	Grand Totals
Group 1 Header	Group 1 Heading
Group 2 Header	Group 2 Heading
Group 3 Header	Group 3 Heading
Group 4 Header	Group 4 Heading
Group 5 Header	Group 5 Heading
Group 5 Totals	Group 5 Subtotal Label, Group 5 Subtotals
Group 4 Totals	Group 4 Subtotal Label, Group 4 Subtotals
Group 3 Totals	Group 3 Subtotal Label, Group 3 Subtotals
Group 2 Totals	Group 2 Subtotal Label, Group 2 Subtotals
Group 1 Totals	Group 1 Subtotal Label, Group 1 Subtotals
Header	Title, Subtitle 1, Subtitle 2, Report Date*, Page Numbers* **(depends on settings from Page Setup tab)*

Report Section	Text elements contained within
Records	Report Data

Once you have displayed a text element or report section in the preview pane, highlight it and use the formatting buttons on the toolbar to set its formatting.

Text formatting options are found here on the Print Setup tool bar.

When you select a Text Element or Report Section to modify, the text in question is highlighted in the preview pane.

(This may be difficult to see in printed manuals, as the highlight color is a light yellow.)

Changing a Report's Type

The three types of Organizer reports—Detail, Summary, and Top *N*—are described in "Organizer Report Types" on page 500. When you change report type, tab order and available options change as well.

Caution: If you change a report to a different type, options that you have configured which are not available for the new report type will be lost. In case you need to revert to the original report type, you should save a copy of the report before changing its type.

When the Print Setup form opens, the detail report option is selected by default. If you want to create a detail report, simply begin configuring the print options as described in the previous section. If you'd like to create a different type of report, choose Tools ➤ Change type to. Then select either Summary or Top *N* from the drop-down list that appears.

You may also choose to change a report's type at any time during the setup process, or even after it has been saved to the Reports Library. For details on editing the properties of saved Organizer reports in the Report Library, refer to "Modifying a Saved Organizer Report" on page 533.

The following sections describe issues you will encounter on the Print Setup form when changing a report's type.

Report Options and Page Setup Tabs

The options available on these two tabs are universally available for all report types. No settings will be changed or lost when changing the report type.

Columns Tab

- When converting *to a summary report*, the following will occur:
  - All columns that do not contain a number or currency value will be removed.
  - All columns representing data from categories other than the current Organizer folder will be removed. (E.g., if you are creating a report in the Payments folder, columns with Contact data will be removed.)

  All other columns will retain their order. Any gaps in the column order resulting from the removal of columns will be closed by moving up the following columns.
- When converting *from a summary report*, the following will occur:
  - Any group heading columns or record count columns will be removed.

Sorting/Grouping Tab

All settings on this tab will be retained as long as they are also available for the new report type. If any options from the original report type are not available for the new report type, your settings for those options will be deleted. Even if you later revert the report to the original type, you will need to set these options again.

Design Tab

All design elements that are available for the new report type will be carried over, along with their settings. Elements that are not available for the new report type will be removed, *but their settings will be retained until you save the changes to the report*.

Note: Keep in mind that if you change the report back to its original type before saving, any removed elements will revert to their prior settings, but all other elements will reflect any changes you have made.

When converting to a top *N* report, the "Subtotal Label" and "Subtotals" elements will inherit the "Group 1 Subtotal Label" and "Group 1 Subtotal" from the original report.

Percentage Codes for Ad-Hoc Reports

All of the options available in Views for Percentage Coding are also available for Ad-Hoc reports.

1. From the Requests folder go to File > Print > Column tab.
2. For *Select available columns from*, select Coding Sheet.
3. Add the percentage coding enabled code table to your columns view list.
4. It is recommended to set the column display to Primary and Secondary if you have multiple percentage codes for each request.
5. Check the box for Display percentages.
6. Run the report to see your results.

Sorting/Grouping When adding a percentage code enabled code table as a Group column, there will be the option to break Requests into different group sections according to the codes assigned. This essentially displays the Request multiple times with partial amounts based on percentage.

Once the percentage code enabled table is added as a column, the Request Amount and/or Grant Amount columns will have a Display partial amount option.

In the example below, the American Foundation for Children is listed twice. Once for Northeast at 50% and then again for Southeast at 50%.

!CP test

Organization's Name begins with '%'

15 February 2011

Disposition	Type/Status	Organization	Project Title	Geographical Area Served	Request Amount
Northeast					
Pending 6/20/2011 (LAUREN)	Cash Grants Considered for Board	American Foundation for Children Martin Doyle Tel: (212) 555-4366 doylem@afc.org	Someone to Run With	Northeast (50%)	$40,000.00
Total Northeast (1 item)					$40,000.00
Northwest					
Pending 6/18/2011 (BEN)	Cash Grants Staff Review	Ryan School of Medicine Jack K. Ryan Tel: (203) 771-2849 Fax: (203) 771-2889 ryanj@ryanschool.org	Renovation of medical training facitlity	West (40%)	$6,000.00
Total Northwest (1 item)					$6,000.00
Southeast					
Pending 6/20/2011 (LAUREN)	Cash Grants Considered for Board	American Foundation for Children Martin Doyle Tel: (212) 555-4366 doylem@afc.org	Someone to Run With	Northeast (50%)	$16,000.00
Total Southeast (1 item)					$16,000.00

Running Reports

The final step in the reporting process is, of course, to output the report in a usable format.

Running an Ad Hoc Report

Once you have set the printing options for an ad hoc report, you are ready to output the report. If you would like to print the report, choose File ➤ Print Report from the Print Setup form to bring up a standard printer setup form. If you want to see the report on screen before outputting a final copy, choose File ➤ Preview Report. The report will open in the Active Reports viewer. For details on working in the Active Reports viewer, please see "The Active Reports Viewer" on page 528.

Running Reports From the Report Library

Reports saved in the Report Library may be run from any tab of the Organizer. If you would like to run a report from the Report Library:

1 From any tab of the Organizer, choose View ➤ Reports. The Report Library opens.

2 Go to the appropriate category folder in the Report Library and use the drop-down list to select the report you wish to run.

3 Choose File ➤ Run Report from the Report Library menu:

- If you are running a standard GIFTS report, the report will open in the Crystal Reports viewer. For details on working with standard reports and the Crystal Reports viewer, please refer to the *Using GIFTS Reports* manual.
- If you are running a saved Organizer report, the report will open in the Active Reports viewer. The following section provides details on previewing and outputting reports from the Active Reports viewer.

Running Quick Reports

You can now automatically populate the Reports Library with selected Record IDs as the search criteria. For example, if you are in the Requests folder and have selected three Requests, you can run a quick report, which displays the Report Library with the three Request's Request IDs automatically populated as the search criteria. This allows you to save time when running reports for specific records. For more information, please refer to "Running Quick Reports" on page 44 of the *Using GIFTS Reports* manual.

The Active Reports Viewer

Whenever you preview a new ad hoc report or run a saved Organizer report from the Report Library, the report will be displayed in the Active Reports viewer. The viewer allows you to check the layout of a report before you

print or export a final copy. The following shows a sample report displayed in the Active Reports viewer:

Viewing a Table of Contents

If your Organizer report uses grouping, Active Reports can display a table of contents based on the group values. To see a list of the values included in the report, click Table of Contents on the toolbar. A Contents frame opens on the left side of the viewer:

Click the Table of Contents button again to close the Contents frame and restore the viewer to full size.

Click on an item in the Contents frame to jump to the first page of the report on which the item appears.

If your report contain's multi-level grouping, you can expand items in the list to see their sub-groups in the table.

Searching in the Viewer

If you would like to find a particular value within a report, click Find on the toolbar. A standard Find form opens:

Enter a search value and click Find Next. The viewer will jump to the first page on which the search value appears.

Copying Pages From the Report

You can use the Active Reports viewer to copy entire pages of reports, which can then be pasted into other applications, like Microsoft Word. Simply use the navigation buttons in the toolbar to find the page you want to copy, and then click Copy on the toolbar. The page is copied to your Windows clipboard, and can be pasted into another application.

Viewing Multiple Pages

The Active Reports viewer displays a single page at a time by default. If you would prefer to view multiple pages of a report at once, click Multiple Pages on the toolbar. A submenu opens with the following options for viewing multiple pages:

Down x Across	
❖ 1 x 1	❖ 2 x 1
❖ 1 x 2	❖ 2 x 2
❖ 1 x 3	❖ 2 x 3

Printing or Exporting a Report

Once you have previewed your report and are ready to print it out, click Print in the Active Reports toolbar. A standard printer setup form will open, allowing you to select your printer, as well as the page range and number of copies to print.

In addition to printing a hard copy of your report, Active Reports allows you to export your report in a variety of electronic formats. Choose File ➤ Export, and then select one of the following export formats from the submenu:

Export Formats

- ASCII
- HTML
- PDF
- RTF
- XLS

Saving an Ad Hoc Report

Once you have set up an ad hoc report, you'll probably want to save it for future use. When you save an ad hoc report, it is added to the Report Library as a saved Organizer report.

Saved Organizer reports are not affected by changes to any saved Views or searches that were used to create them. If you want to make changes to the

display or search properties of a saved Organizer report, you must do so by opening the report's Print Setup form through the Report Library.

To save an ad hoc report, simply choose File ➤ Save to Report Library from the Print Setup form. The Save [New] window opens:

Add a name and description for your new report template. A good description will be particularly important if you plan to make your report available in all users' Report Libraries.

Marking a report "read-only" will prevent other users from modifying any aspect of the report definition or formatting. This is important if you plan to make the report available to other GIFTS users. (You can still modify your own ad hoc reports, even if you make them public.)

If you want other GIFTS users to be able to run your report from the Report Library, select "Make this report available to all users."

This indicates the Report Library Category under which your Organizer report will be saved. This is read-only, and based on the Organizer folder in which the records you are reporting on are found.

If you are already previewing the report, close the Active Reports viewer to return to the report's Print Setup form.

Tip: If you want to create a new report that is similar to an existing saved Organizer report, you can create a copy of the existing report as a starting

point. Simply open the existing report's Print Setup form, and then choose File ➤ Save as New Report. When you do, the form will be loaded with the new copy; your changes will not saved to the original.

Modifying a Saved Organizer Report

Caution: Changes made to public reports should be carefully considered, as they will affect all users in your GIFTS system.

The Report Library is the interface through which you will access all of your saved reports—both the standard reports that were installed as part of your GIFTS system and the saved Organizer reports that you have created. Reports in the Report Library are organized into folders, with each folder representing a different category of GIFTS data. There is also a Favorites folder that contains a user-defined list of your most used reports.

Tip: Folders in the Report Library will be hidden if they contain no reports. You may wish to hide folders that you do not need by removing all of their reports. For details on removing reports from the Report Library, please refer to the *GIFTS Administrator's Guide*.

To edit the properties of a saved Organizer report:

1. On any Organizer tab, choose View ➤ Reports from the Main menu. The Report Library opens.
2. Open the folder containing the report you want to edit, and then use the drop-down list to select the report.
3. Choose Tools ➤ Edit Report Definition from the Report Library menu. The Print Setup form opens.
4. Use the options on the Print Setup form to edit the properties of the report. Choose File ➤ Save Changes to Report Definition from the Print Setup

menu to save your changes. For details on the Print Setup form options, refer to "Setting the Print Options" on page 503.

Tip: Your GIFTS administrator may not have granted you rights to modify public saved Organizer report templates. If you have these rights, you will probably want to avoid modifying others' reports. You can save an existing report template under another name, then modify the new report:

1. From the GIFTS main menu, select View ➤ Reports from the Main menu. The Report Library opens.
2. Select the report you want to modify in the GIFTS Report Library.
3. From the Report Library menu, select File ➤ Save Report As. The Report [New] window opens.
4. Choose your save options for the new report template, then modify it as needed.

Deleting a Saved Organizer Report

You can delete a saved Organizer report from the Report Library, provided one of the following conditions is met:

- Your user group's permission set allows you to delete public saved Organizer reports.
- You created and saved the Organizer report you are trying to delete. (You can always delete your own saved Organizer reports, regardless of your permissions.)

To delete an Organizer report from the GIFTS Report Library:

1. From the GIFTS main menu, select View ➤ Reports from the Main menu. The Report Library opens.
2. Select the saved Organizer report you want to delete.

3 From the Report Library menu, select File ➤ Delete Report. A message opens, asking whether or not you want to delete the report specified.

4 Click Yes to delete the report.

Index

A

A.K.A. name, Organization 160
Activities
about 430
accessing 431
adding 437, 465
assigning staff to 444
defined 39
deleting 449
document links 476
exporting to Outlook 450, 467
marking as Done 445
modifying 437, 465
re-opening 446
searching for 435
searching for Requests within 443
transferring to another branch 448
viewing in the Calendar 459
ad hoc reports 499
about 500
deleting from Report Library 534
design options 519
exporting 531
grouping 513
modifying after saving 533
print and format options 503
printing 531
running 527
running from Report Library 527
sample 500
saving 531
sorting 513
types 500
viewing 528
ad hoc reports (Essential GIFTS)
and Organizer Views 122
exporting 128
grouping data in 125
print setup 122
Advanced search
creating 113
planning 111
refining 118
terminology and techniques 108
Affiliations 375
about 376
about Primary 380
about secondary 381
accessing 381
accessing from Contacts 382
accessing from Organizations 384
accessing from Requests 385
accessing from the Organizer 382
adding primary 390
adding secondary 395
addresses 399
closing 404
correspondence options 397
definition 376
displayed in Contact record 366
for Organizations 166
for Requests 195
in the Organizer 388
modifying primary 393
modifying secondary 395
searching 386
viewing 381
alerts
Contact 368
Organization 173
Request 217, 279
Alerts, Payments 279
amending a grant 214
Approving

a batch of Requests 220
a single Request 202
ascending sort 62
Audit Trail 430
author, of documents 410
automatically update search dates 97

B

Background, Organization 160
batch processing 45, 218
branch security
transferring Activities 448
transferring Documents 480
transferring Requests 232

C

Calendar
about 457
accessing 458
closing 470
daily view 464
display options 459
finding and displaying Activities 459
finding and displaying Payments 461
monthly view 463
printing the daily view 467
printing the monthly view 466
case-sensitive searching 95
charts of summary data
creating 71
editing data in 76
formatting 74
clear
Organizer grid 78
Primary Contact from Organization 157
Primary Contact from Request 189
client/server
wildcard character 84
columns
adding 51
combining 58
editing headers of 52
formatting 53
hiding 24
re-sizing 23
separating combined 60
compound expressions 110
Contacts
about 348
accessing 349
adding 353
adding to mailing lists 359
alerts 368
Coding Sheet 364
defined 39
deleting 370
exporting to Outlook 370
modifying 353
overview 347
searching for 350
correspondence
Activity information 418, 423
automatic 414
delivery options 411
mode 414
signer information 410
viewer 419
correspondence, creating 408
currencies
calculating Payments in other 316
exchange rate 223, 317
modifying in Requests 195
modifying Payments in other 318
setting during approval 206, 223
currency
fields 28
formatting in the Organizer 54

D

dates
- entering 28
- formatting in the Organizer 53

Declining
- a batch of Requests 219
- a single Request 199

default
- Organizer grid columns 58
- wire transfer information 161, 196

deleting
- Activities 449
- Contacts 370
- Organizations 175
- Payments 286
- Requests 236
- Requirements 337

descending sort 62

Disposition
- defined 8
- rolling back to Pending 206

Docket Number 188

Document Manager 484

documentation
- conventions xii-xiv
- on CD ??-xxi
- using the documentation set xvii-xviii

Documents
- about 472
- creating batch correspondence 420
- creating correspondence 408
- editing 475
- editing links 476
- linking external documents 484
- locking 482
- removing 481
- searching for 474
- transferring to another branch 480
- unlocking 482
- viewing 475

Done, marking Requirements as 334

E

editing
- correspondence 419
- currency fields 28
- date fields 28
- numeric fields 28
- text fields 25

editing the formatting of 52

e-mail
- merged correspondence by 408
- sending a message 424

Essential GIFTS modules xii

exporting from the Organizer 128

extended alpha search 82

external documents
- printing 486
- viewing 486

F

fiscal sponsor 270

Fiscal Year, of a Payment 265

focus (zoom) 47

Folder toolbar 44

G

grand totals, in ad hoc reports (Essential GIFTS) 124

grant reference number 188

grants
- amending amount 214
- Approving 202
- renewing 211
- rolling back to Pending 206

grid

clearing the Organizer 78
hiding columns 24
Organizer columns 49
Organizer sort order 61
Quick Find 86
refreshing the Organizer 77
re-sizing columns and rows 23
grouping, in ad hoc reports 125
GuideStar research 176

H

height, grid rows 23
highlighting items 18, 44
holding Payments 275

I

icons, used in this manual xii
in-kind payment information 269
is missing (search condition) 92

K

keep document on disk 418

L

letters
creating and sending 408
linking external documents 484
links, Document 476
locking a batch of Requests 225
locking Documents 482
locking Requests 209
logging in
as a different user 17
to GIFTS 16

M

mailing labels 424
mailing list
sending letters to 420
setup 359
Main toolbar 20
match case, when searching 95
meeting date 188
merged correspondence, creating 408
most recent searches 101
moving documents 479
multi-currency features 289

O

omit organization name 360
online Help xviii
online requirements
removing 345
Organizations
A.K.A. name 160
alerts 173, 217, 279, 368
Background 160
coding 164
defined 38
deleting 175
research with GuideStar or Revenue Canada 176
Sort as 160
subsidiary 169
Vendor Number 160
viewing Web sites 175
Organizer
column headings 49
exporting data from 128
overview 38
print setup (Essential GIFTS) 122
refreshing the grid 77
sort order 61

views 63
Outlook
Activities scheduled in 454
exporting Activities to 450, 467
exporting Contacts to 370
exporting Requirements to 338, 467
Requirements scheduled in 338

P

password
changing 18
setting 18
payee, changing 270
Payment Alerts 279
Payment Status 255
Payments
batch Payments 274
calculating in other currencies 316
canceling 270
consolidating 278
contingent 285
defined 39
deleting 286
holding 275
marking a batch as Paid 274
paying 271, 466
quid pro quo information 268
refunding 282
scheduling 256
searching for 260
splitting 278
viewing in the Calendar 461
voiding 276
wire transfer information 266
Pending 183
phone book search 82
pledges 187
Portable Document Format (PDF) xxi
primary codes 34
Primary Contact
change for a Request 188
clear from Organization 157
clear from Request 189
print options (Essential GIFTS) 122
printing
Daily Calendar 467
Monthly Calendar 466
search syntax 93
printing (Essential GIFTS)
grand totals 124
subtotals 125
proposals
Approving 202
Declining 199

Q

Quick Find
grid 86
updating date searches 96
Quick Help 20
quid pro quo information 268

R

recent searches, running 101
refresh mode 77
refreshing system settings 78
refreshing the grid 78
refunding Payments 282
reissuing Payments 277
removing Documents 481
Removing online requirements 345
renewing
a batch of grants 227
a single grant 212
reports
resetting global formatting defaults 503
reverting to last ad hoc 503
Requests

adding 182
amending amount 214
Approving 202
assigning branches 184
Coding Sheet 191
Declining 199
defined 38
deleting 236
Disposition 8
Docket Number 188
Folder 180
locking 209
meeting date 188
modifying 182
processing 198
renewing 211
rolling back to Pending 206
searching for 178
Status 8
Status change 207
summary information 70
transferring to another branch 232
transferring to another Organization 231, 234
Type 8
unlocking 209
Requirements
about 322
accessing 322
adding 327, 331, 465
assigning staff to 333
deleting 337
exporting to Outlook 338, 467
marking as Done 334
modifying 327, 331, 465
searching for 326
searching for Requests within 330
undo mark as Done 336
research with GuideStar or Revenue Canada 176
Revenue Canada research 176
rolling Requests back to Pending 206
rows (grid), re-sizing 23

S

salutation fields 359
saved searches
creating 102
deleting 107
editing 107
favorites 105
making a copy of 107
making available to other users 103
renaming 107
running 105
scroll bar 41
search criteria 110
searches, most recent 101
searching
automatically updating dates 97
case-sensitive 95
compound expressions 110
extended alpha 82
for missing data 92
overview 82
phone book 82
Quick Find 85
terminology and techniques 108
wildcard characters 84
secondary codes 34
selecting items 18, 44
set as initial view 458
show columns options 49
show last query in Quick Find 91
signer information, correspondence 410
signer, of correspondence 410
Singer Info, Quick Entry 143
Sort as, Organizations 160
sort order, Organizer grid 61
spell checking 26
Status changes 207
subsidiary Organizations 169

summary information
charting 70
viewing 70
syntax, of searches
building 113
printing 93

T

text fields 25
toolbar
Folder 44
Main 20
transferring Requests
to another branch 232
to another Organization 231, 234
to another Primary Contact 188

U

unlocking a batch of Requests 225
unlocking Documents 482
unlocking Requests 209
updating search dates 97

V

Vendor Number 160
verify tax status online 176
Views, Organizer
about 63
applying 67
creating 65
deleting 68
editing 65
voiding Payments 276

W

Web sites, viewing 175
width, grid columns 23
wildcard characters 84
wire transfer information
for a Payment 266
for a Request 196
for an Organization 161
write-up
creating in Microsoft Word 408

Z

zoom 47