Welcome to GIFTS Alta 1.7

This document contains a summary of interface changes and fixes to known issues included in the GIFTS Alta 1.7 release on December 15, 2014.

Content

Welcome to GIFTS Alta 1.7 1
What's included in GIFTS Alta 1.7? 2
How do I get the GIFTS Alta 1.7 Upgrade? 2
Will GIFTS Alta 1.7 require upgrading other MicroEdge products I have installed? 2
GIFTS Alta Support 2
New Features for GIFTS Alta 1.7 3
GuideStar Charity Check Support 3
GuideStar Charity Check Activation 3
Setting Up Your GuideStar Credentials 3
Subscription Verification 4
Changes to Lookup Results 5
Search Results Details 6
Changes to Organizations 7
Changes to Activities 7
GIFTS Alta – Hot Keys 7
Ad Hoc Reporting Update for IRS 990 13
Document Merge to PDF 16
Merge to PDF Action 16
IGAM Updates for GIFTS Alta 20
Requests and Requirements Resubmission 20
Initiating Resubmissions 20
From IGAM 20
From Requests 22
From Requirements 23
Changes to Active Form/Deactivation 24
Notifying Applicants 24
Cancel Resubmission 24
Retrieval & Workspace Changes 25
Linking Resubmissions 25
Considering Resubmissions 25
Considerations for Application Transfer 25
Simplify for Online Applicants 26
Update to UTF-8 Character Encoding 33
Known Issues Fixed in GIFTS Alta 1.7 34
Known Issues Fixed in IGAM 6.0 40

What's included in GIFTS Alta 1.7?

GIFTS Alta 1.7 includes the following enhancements and fixes for a number of known issues.

Enhancements include:

- Guidestar Charity Check Support
- Hot Keys
- New IRS 990 Columns for Ad Hoc Request Reports
- Merge Documents to PDF
- IGAM Resubmission
- IGAM Simplify Support
- IGAM UTF-8 Support

How do I get the GIFTS Alta 1.7 Upgrade?

The GIFTS Alta 1.7 upgrade is free to all current GIFTS Alta users current on Maintenance and Support.

To obtain the necessary files to upgrade to GIFTS Alta 1.7/IGAM 6.0, please send an email to upgrade_inquiries@microedge.com. The process will take 3-5 business days.

Will GIFTS Alta 1.7 require upgrading other MicroEdge products I have installed?

If you have any previous version of GCS, GIFTS Alta Link, GIFTS Alta Reminders, or IGAM currently installed, they will need to be upgraded to the latest versions included with the GIFTS Alta 1.7 download in order to ensure compatibility with the stronger login security features, Office 2013 Professional, 64-bit Windows and other new features.

- GIFTS Alta Links and Reminders (to update for resolved issues)
- IGAM 6.0 (will automatically be updated with GIFTS Alta 1.7)

NOTE: Job Manager, Links and Reminders must be installed separately from the main setup files.

GIFTS Alta Support

The GIFTS_Alta_1.7.zip you download contains all setup files and all user documentation. Refer to the Docs folder in this zip file for the *GIFTS Alta Installation and Technical Reference Guide*, which will lead you through the upgrade process.

Please contact Technical Support if you have additional questions about the updating of your installation to GIFTS Alta 1.7.

Telephone: (877)704-3343
Email: Helpdesk@microedge.com

New Features for GIFTS Alta 1.7

GuideStar Charity Check Support

GuideStar is the industry standard and we have long wanted to incorporate their tax status data into GIFTS Alta to allow clients with Charity Check subscriptions (purchased from GuideStar) to get the data from their system.

The interface used will be the same as the current Tax Status feature. The only difference will be that the information searched and displayed will come from GuideStar.

GuideStar Charity Check Activation

In order to activate your Charity Check integration you need to be on GIFTS Alta 1.7 and have a valid, paid subscription to GuideStar's Charity Check.

Please follow the steps below:

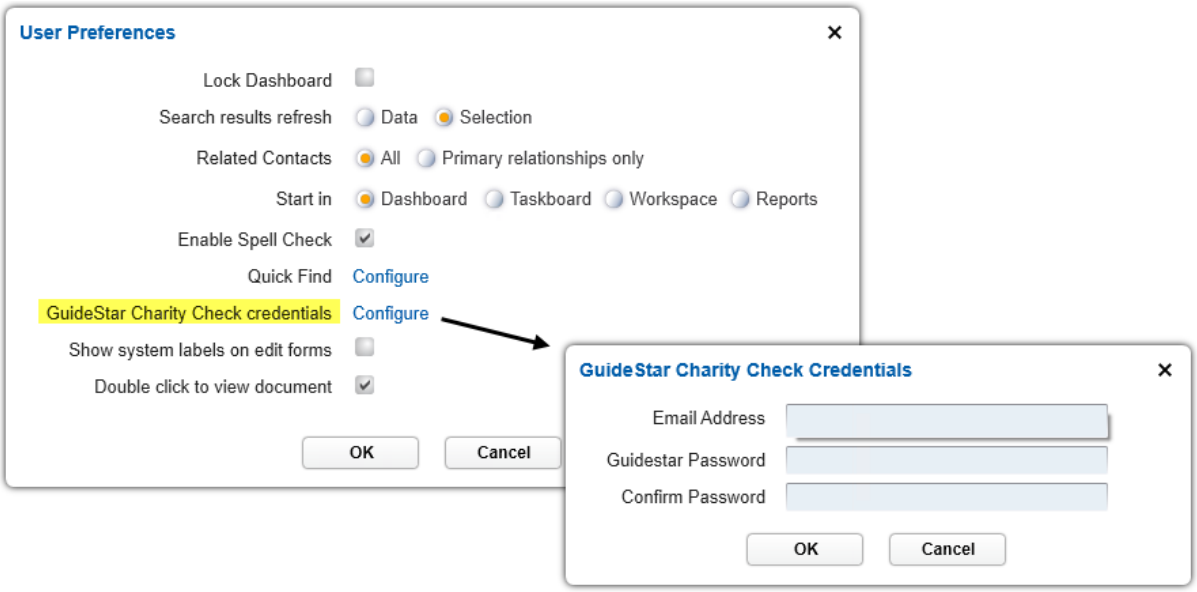
1. Email MicroEdge Services at services@microedge.com and provide your:
    - Company Name
    - EIN#
    - Email address associated to your Charity Check subscription
2. The MicroEdge Services Team will then validate your credentials with GuideStar and activate your integration.
3. You will then receive a confirmation email from services@microedge.com that your account has been activated.
4. Once you receive your confirmation from services@microedge.com , enter your GuideStar Credentials into the GIFTS Alta as described below.

Setting Up Your GuideStar Credentials

Each user has to provide their GuideStar login information to verify that they have access to Charity Check.

In GIFTS Alta, this is done via the **GuideStar Charity Check Credentials** configuration. You can access it by opening the **User Menu** and selecting **Preferences**.

NOTE: If you do not have permissions to use tax lookup/verify, this new link to configure Charity Check Credentials will not appear.



Email Address – Text; required. Enter the email address that is associated with your GuideStar account.

GuideStar Password – Text; required. Enter your GuideStar password. Note that the interface will only show dots for each character.

Confirm Password – Text; required. Enter your GuideStar password again to confirm. This text must match the GuideStar Password field above to proceed.

OK – Click **OK** and your credentials will be saved.

Cancel – Clicking **Cancel** closes the form and no changes are saved.

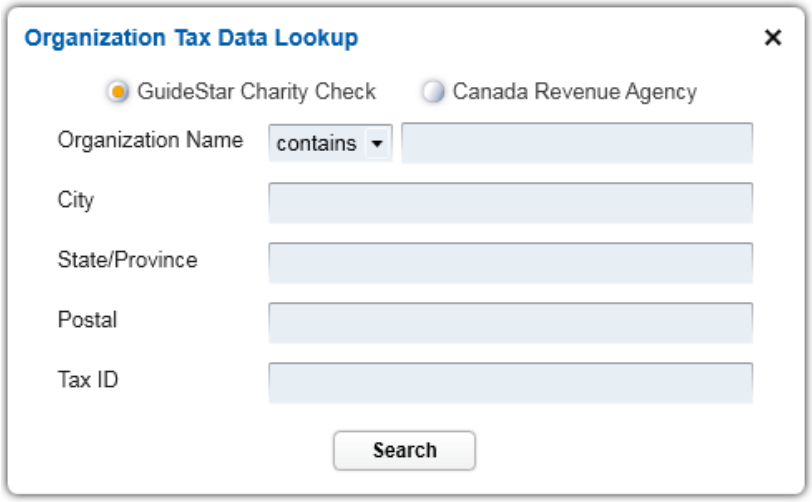
Subscription Verification

In GIFTS Alta, select **Launch > Tax Status Lookup** to start the tax lookup process or go to **Actions > Verify Tax Status** after selecting one or more organizations.

At this point the system will verify if the user's Guidestar Charity Check and/or Tax Status Plus subscriptions are valid.

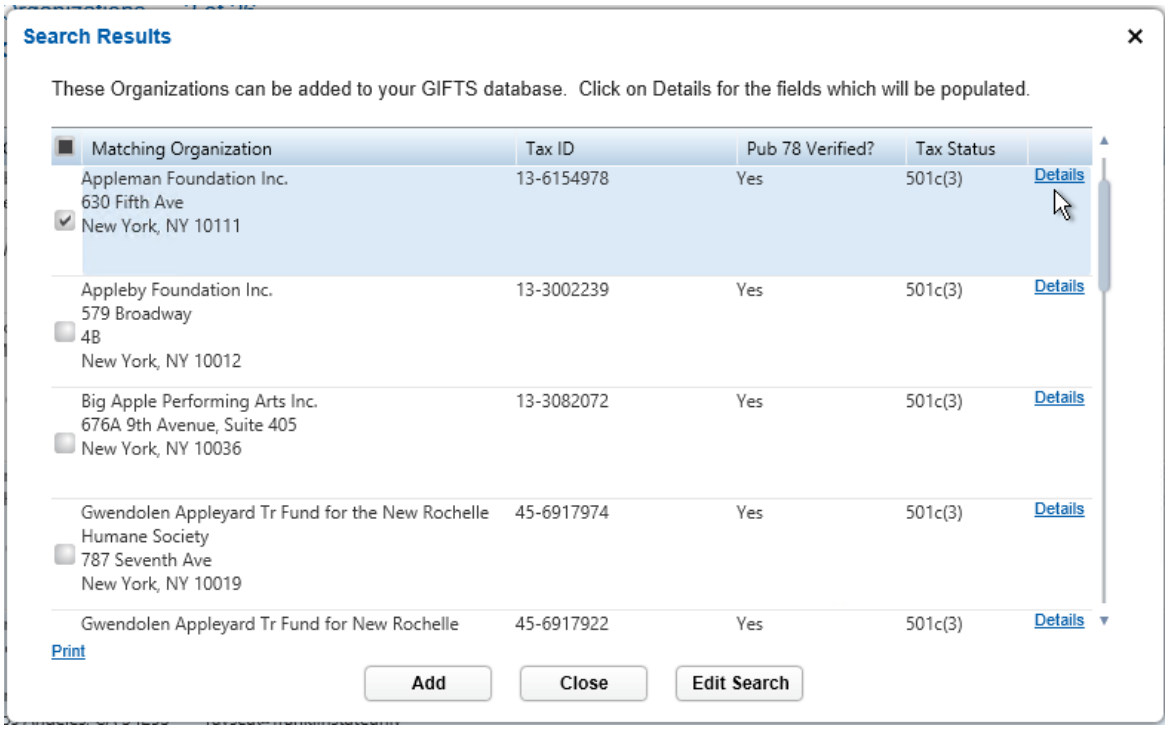
If the credentials entered into the Guidestar credentials are invalid, the user will be alerted through a message prompt and they can continue the lookup using the existing Tax Status Lookup functionality.

If both credentials/subscription are valid, then the Tax Lookup form will have the option for the user to select Guidestar Charity Check or Canada Revenue Agency on top for the lookup:



Changes to Lookup Results

When Charity Check is used for a search, the Public Charity column will be replaced by a **Pub 78 Verified** column.

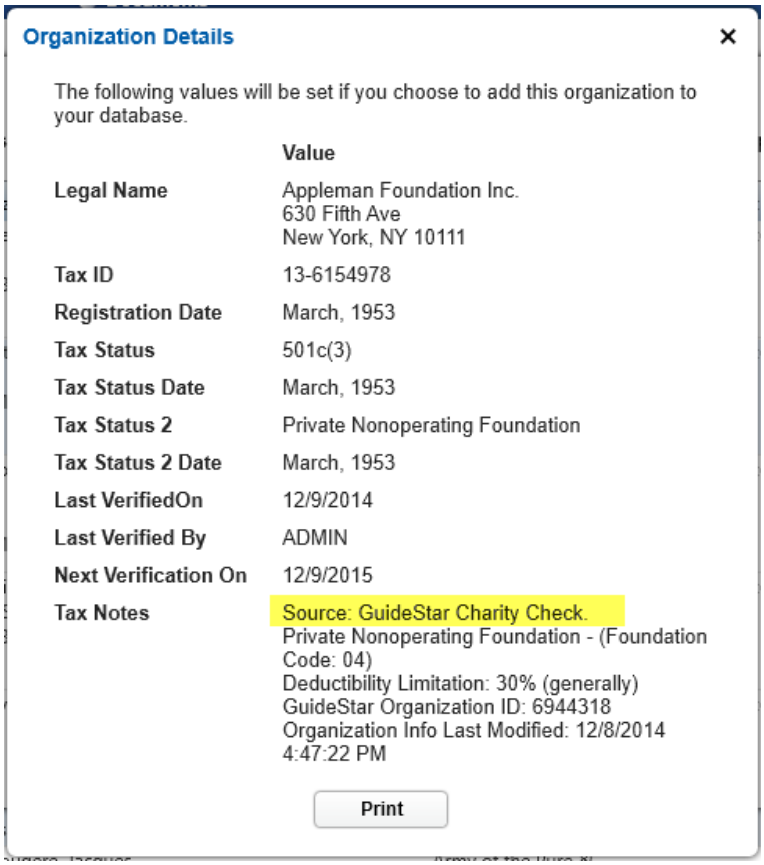


Search Results Details

Some additions have also been made to the information displayed when you click **Details**.

The following information has been added under Legal Name.

- Address 1
- Address 2
- City
- State/Province
- Postal Code



Organization Details

The following values will be set if you choose to add this organization to your database.

	Value
Legal Name	Appleman Foundation Inc. 630 Fifth Ave New York, NY 10111
Tax ID	13-6154978
Registration Date	March, 1953
Tax Status	501c(3)
Tax Status Date	March, 1953
Tax Status 2	Private Nonoperating Foundation
Tax Status 2 Date	March, 1953
Last VerifiedOn	12/9/2014
Last Verified By	ADMIN
Next Verification On	12/9/2015
Tax Notes	Source: GuideStar Charity Check. Private Nonoperating Foundation - (Foundation Code: 04) Deductibility Limitation: 30% (generally) GuideStar Organization ID: 6944318 Organization Info Last Modified: 12/8/2014 4:47:22 PM

Print

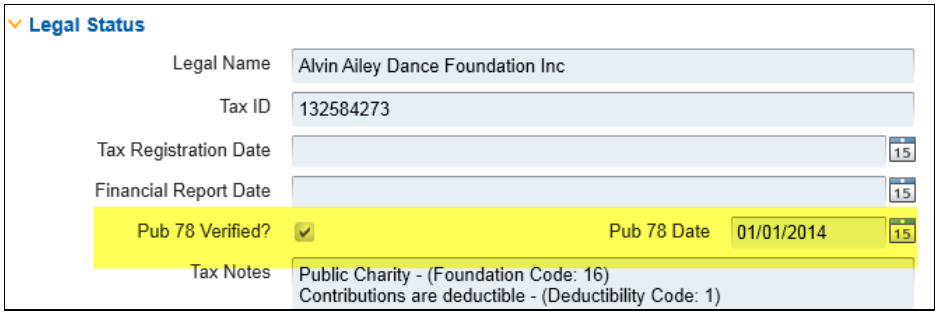
When you update an Organization with new data, the first line of **Notes** will state the source:

- If the source is GuideStar's Charity Check, first line reads: "Source: GuideStar Charity Check."
- Otherwise: "Source: IRS BMF/Canada Revenue Agency" will be displayed.

If the source is GuideStar's Charity Check, the details under Notes will also include **Pub 78 Verified?** and **Pub 78 Date**. This information will be reflected in the Organization record as shown below.

Changes to Organizations

To support Pub 78 verification data, organization edit forms will include **Pub 78 Verified?** and **Pub 78 Date** fields in the Legal Status section.



NOTE: The fields will be added automatically to system forms but will need to be added manually to any custom Organization forms.

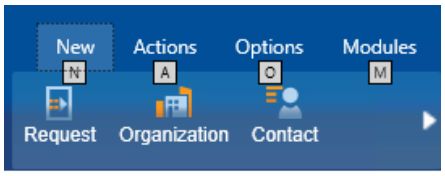
Changes to Activities

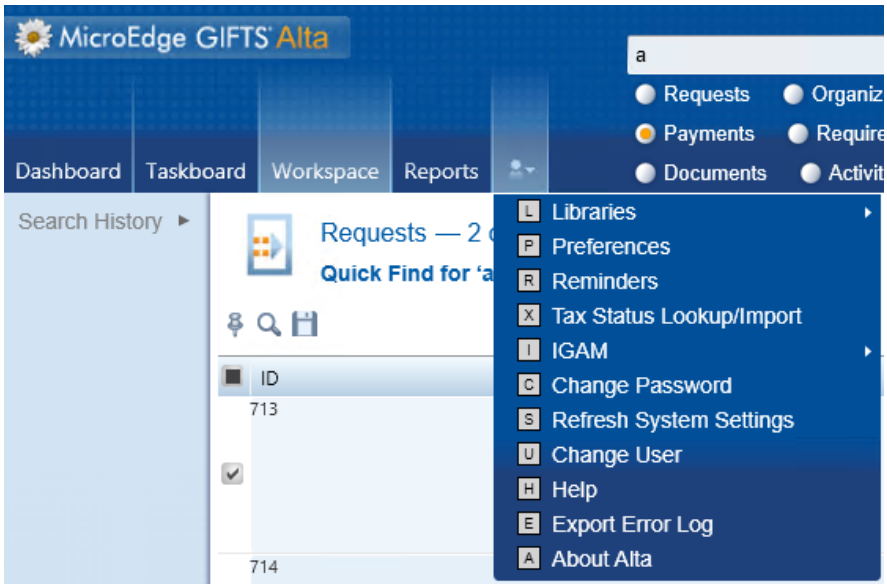
Each time an organization is updated via Verify Tax Status an activity is created to note the action. Depending on the data source, one of the following statements will now be included in the Long Notes field.

- "Source: GuideStar Charity Check."
- "Source: IRS BMF/Canada Revenue Agency."

GIFTS Alta – Hot Keys

GIFTS Alta Hot Keys allow a user to press the **Alt** key while GIFTS Alta is open and then press a key that corresponds to one of the options currently available in the header. In this mode, a letter will appear next to each option signifying what the hot key is.





Pressing **Alt** again will turn off Hot Key mode.

Ribbon Menu Scrolling

When a ribbon menu has too many options to show at once, the number 1 and 2 keys may be used to scroll left and right respectively through 'pages' of options.

Exiting with Alt

Hitting the **Alt** key when in Hot Key mode will exit Hot Key mode no matter what level you are in.

Esc

Pressing the **Esc** key will go one level back (up). If in the top level, pressing Esc will exit hot keys mode.

Arrows

The arrow keys will be used to navigate through menu items one at a time. The left and right keys will navigate horizontally through items. The up and down keys will navigate vertically through items.

Mouse Wheel

The mouse wheel can also be used to navigate menu options left or right.

Hot Keys Index

The tables below show the key for each function when in Hot Key mode.

User Menu (Alt-U)

Item	Shortcut Key	Lower Level Shortcuts
Libraries	L	Saved Views - V Tasks – T Dashboard - D
Preferences	P	
Reminders	R	
IGAM	I	Refresh Due Dates – D Upload Request Status – R

		Upload Payment Status - P
Change Password	C	
Refresh System Settings	S	
Change User	U	
Help	H	
Export Error Log	E	
About Alta	A	

Quick Find (Alt)

Only the record types that are enabled in Preferences will appear with its shortcut key.

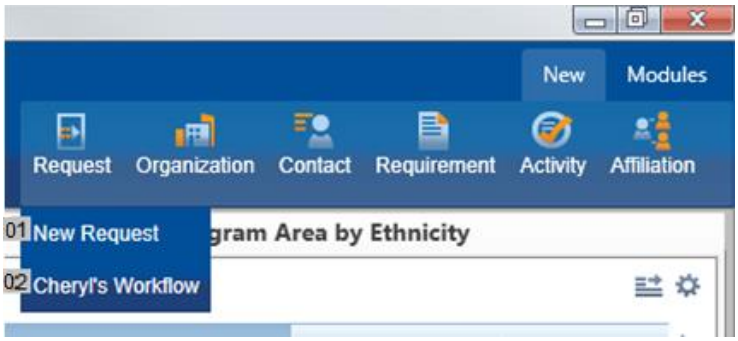
Item	Shortcut Key
Requests	FR
Organizations	FO
Contacts	FC
Payments	FP
Requirements	FQ
Reviews	FV
Documents	FD
Activities	FA

New Ribbon Menu (Alt-N)

Action	Shortcut Key	Record Type
Request	R	New Request record
Organization	O	New Org record
Contact	C	New Contact record
Requirement	Q	New Requirement record
Document	D	New Document record
Activity	A	New Activity record
Affiliation	I	New Affiliation record
Field	F	New Field (Blueprint)
Calculation	C	New Calculation (Blueprint)

URL	U	New URL (Blueprint)
Edit Form	E	New Edit Form (Blueprint, Forms Library)
Workflow Form	W	New Workflow form (Blueprint, Forms Library)
Record	R	Customize Form Preview (Blueprint, Forms Library)
Section	S	Edit/Create Form Definition (Blueprint, Forms Library)
Workflow	W	Workflow Library (Blueprint)

In Blueprint, users can set up more than one edit form for each record type, in which case a dropdown will be displayed:



The shortcut keys for this dropdown list will be numbered from 01 to 99. Hot Keys supports up to a maximum of 99 forms.

Action Ribbon Menu (Alt-A)

Below is a list of the Action and its associated shortcut key across all record types:

Menu Item	Shortcut Key
Activate	A
Add Subsidiary	SA
Amend	N
Approve	A
Assign Groups/Users	S
Assign Reviewers	S
Assign Staff	F
Batch Update	B
Cancel	L

Commit	M
Commit Budget, Resolve Budget, Commit/Resolve Budget	B
Correspond	C
Create Grantee Account	GC
Create Payments, Modify Payment Schedule	P
Create Requirements	Q
Deactivate	D
Decline	D
Delete	X
Delete from Web	WD
Edit Account Info	I
Export	E
Hold	H
Import	I
Lock	L
Mark as Closed	MC
Mark as Done	MD
Mark as Not Done	MN
Modify Schedule	M
Move Document	DM
Open	O
Pay	P
Perform Action	P
Preview	P
Print Document	DP
Publish to Web	WP
Reassign Reviewer	R
Reissue	R
Remove Document	DR
Remove Subsidiary	SR
Renew	J
Report	T
Research GuideStar	G

Reset	R
Reset Grantee Password	GR
Rollback to Pending	R
Search Watchlists	W
Set Alert	E
Shareable Status	DS
Status Change	Y
Submit	S
Transfer Branch	TB
Transfer Grantee Account	GT
Unlock	U
Update Classifications	UC
Upload Status	GS
Upload Status	US
Verify Tax Status	TV
View Document	DV
View Website	V
Void	V
Write-Up	I

Options Ribbon Menu (Alt-O)

Item	Shortcut Key
Print	P
Export	X
Chart	C
Summary	S
E-mail	E
Report	R

Modules Ribbon Menu (Alt-M)

Item	Shortcut Key	Lower Level
IGAM	I	
Employee Giving	E	
Accounts Payable	P	
Report Designer	R	
Budget	U	
Administrator	A	
Blueprint	B Blueprint has 5 lower level selections in a dropdown	Fields Library – F Forms Library – O GCS Layouts – G Workflows Library – W Custom Fields - C

Ad Hoc Reporting Update for IRS 990

To allow users to create 990 reports which meet changing IRS standards, five new 990 related columns can now be added to the 990 Report or new Request ad-hoc reports as calculated columns. This will enable users to update the reports to match changing IRS requirements and customize it to their needs.

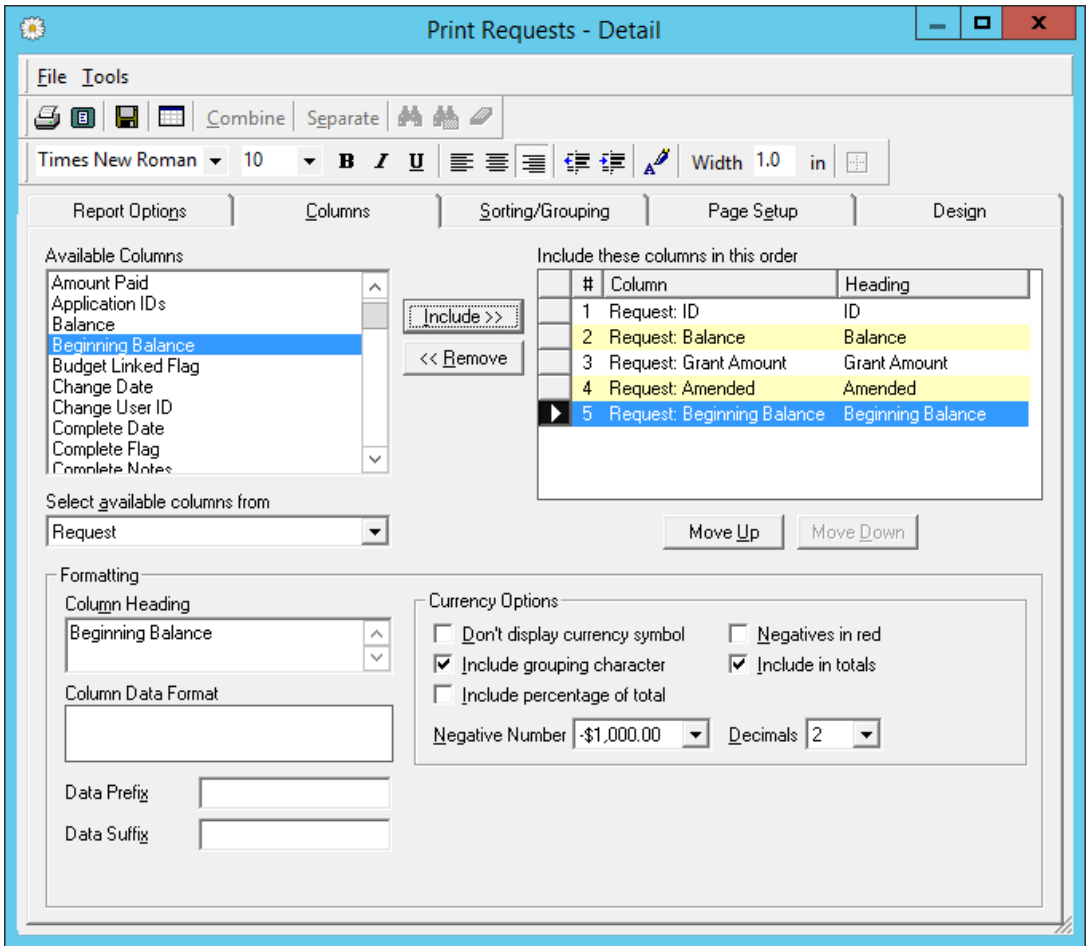
For Requests, the columns available include:

- 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.

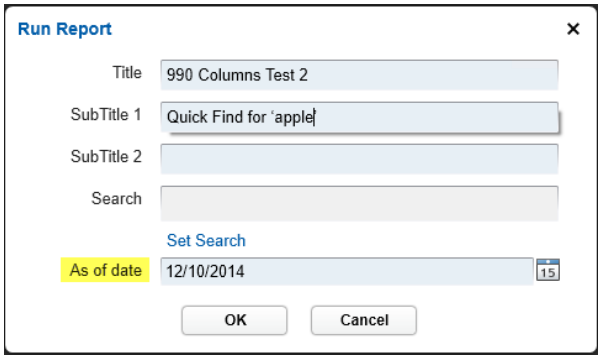
No search filters will allowed to be applied to these columns.

Users will simply perform a Request search, then go to **Options > Report**. 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. If you are running the 990 Report, this field will be called '**990 date**'. This date will decide what Fiscal year the columns are calculated for.



The table below describes each new calculated column:

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).
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 Beginning Balance plus the Newly Allocated amount plus the Amended column amount minus the Amount Paid.

Document Merge to PDF

GIFTS Alta now has the ability to take one or more documents and merge them into one PDF.

All users will have the ability to select multiple documents from a Related records or a workspace search results page and perform a batch action (Action menu item) that will combine the contents of the selected documents into one .pdf file. A Document record is created and linked to the actual .pdf file.

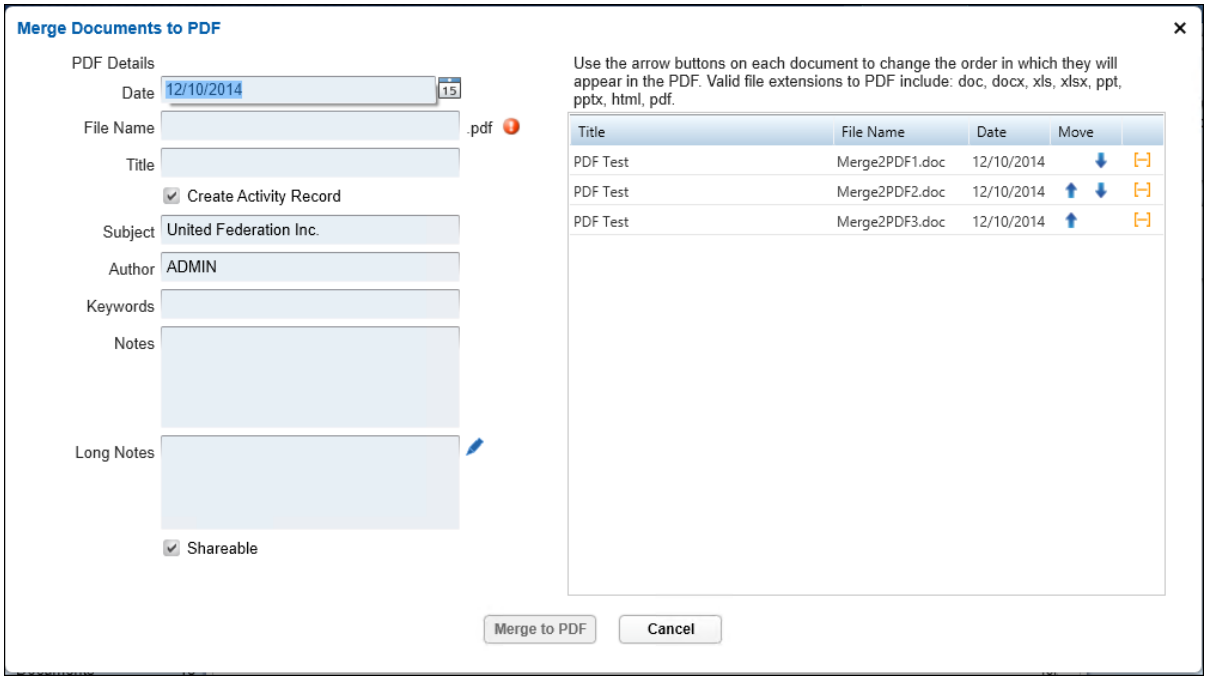
Merge to PDF Action

When one or more documents are selected in related records or in a search in the workspace, a **Merge to PDF** option will be available in the Actions menu.

IMPORTANT: Please make sure all selected documents are closed on the current workstation.

NOTE: There is a limit of 50 documents. If more than 50 documents are selected and the Merge to PDF action is selected, an error message will appear.

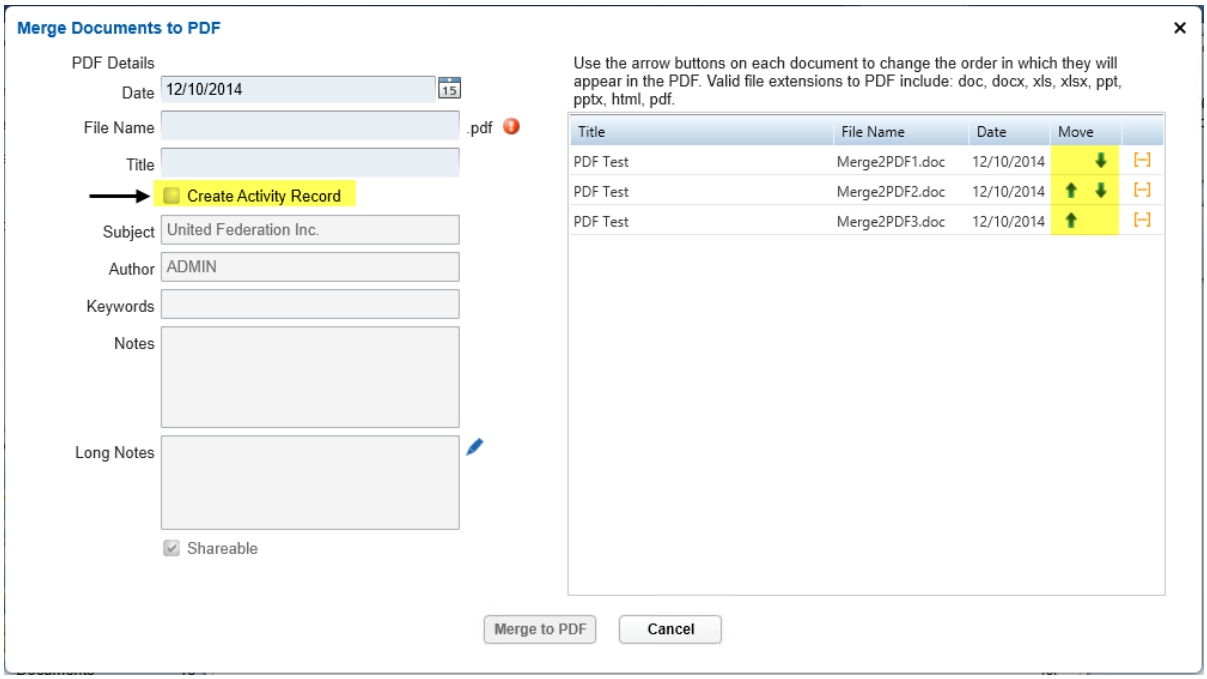
Selecting the **Merge to PDF** action in the Action menu will pull up the following form:



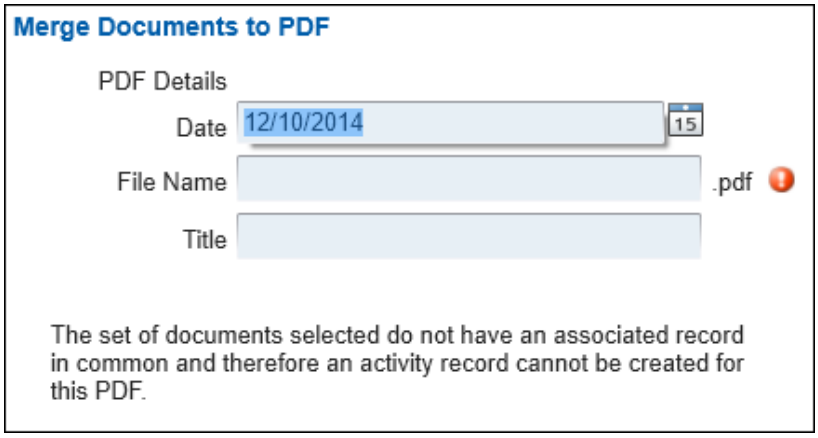
On the left hand side of the form, users can fill in information pertaining to the PDF that is being created.

The selected documents will be listed on the right with up/down arrows which can be used to arrange the documents in a desired order. Clicking the orange icon to the right of a document will remove it from the list.

Users also have the option to create an Activity record during this process by keeping the **'Create Activity Record?'** checkbox checked. If it is not checked, then all the PDF details fields will be disabled except for Date, File Name and Title. In addition, a document record will not be created.



If the selected set of documents do not have a common associated record, the '**Create Activity Record?**' checkbox will not appear and text will be displayed instead of the record fields informing the user that an activity record could not be created:



If the '**Create Activity Record'** box is checked, then all fields will be enabled and a new document record will be created using the document details entered in the form:

Date – Defaults to current date.

File Name – This is the name that the PDF being created will have when it is created. Required Field – the "Merge to PDF" is disabled until a valid value is entered into the field. The value entered can only contain alphanumeric characters and underscores and may not contain spaces.

Title – Document Title.

Create Activity Record? – Defaults to True for a set of documents that have an associated record in common. This is only visible if the set of documents selected by the user has an associated record in common.

Subject – Depending on if these documents are related to the same Request/ Org/ Contact/ Requirement/ Payment/ Review, then those [ID]s should be displayed.

If the documents share one record in common, that record is specified as default subject.

If the documents share multiple records in common (i.e. Org, Request, Contact), the subject is left blank.

Author – Defaults to user

Keywords – No default

Notes – No default

Long Notes – After the PDF is created, a list of the documents that were combined to create the PDF will be appended to any notes created.

Shareable – Default to True

Document Associated Record

If the documents were selected from a related records tab, the resulting pdf document will be associated with that same primary record. If there is no related record common to the selected documents, then an Activity record will not be created, however the PDF will still be available to be created and stored.

Document Order

On the right hand side of the form, a grid will show the order of the documents. Here the user can reorder the documents or remove documents from the list altogether.

Up – Moves document up one spot on the list. For the first document, up is disabled.

Down – Moves document down one spot on the list. For the last document, down is disabled.

Remove – Orange button in the grid, enabled only when one or more document records are selected in the grid. Clicking removes the document from the list.

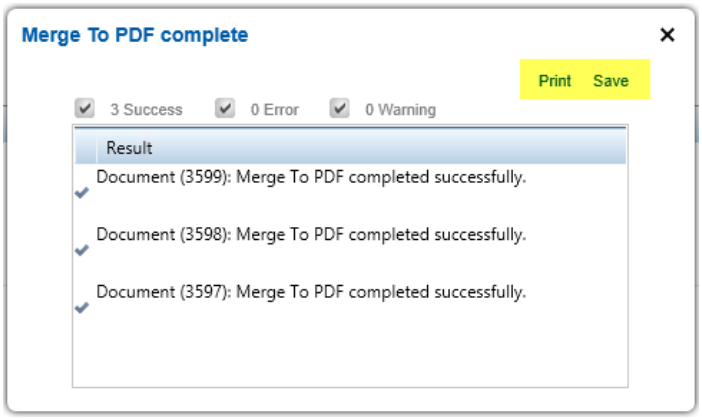
Merge to PDF Button

When the user is done inputting details and ordering the documents, all required fields are filled and all unsupported documents are removed from the list, the **Merge to PDF** button will be enabled.

Once the merge is completed, two popups will be displayed.

The first popup shows the number of successful records merged, records with warnings, and records skipped due to errors. Click **OK** to close it.

The second popup is the process log and allows the user to either **Print** or **Save** the log.



File Types Supported

The following file types can be merged into a PDF:

- .doc
- .docx
- .ppt
- .pptx
- .xls
- .xlsx
- .pdf
- .html*

NOTE: Some HTML coding may not render correctly when converted to PDF format.

IGAM Updates for GIFTS Alta

Requests and Requirements Resubmission

NOTE: This feature is only available to clients with the IGAM module.

GIFTS Alta users can now send back an application or a requirement that was submitted online to allow the grantee to make changes and resubmit back into GIFTS Alta. The Resubmission process can be initiated by the user while considering an application or from the Request or Requirement form within GIFTS Alta. Publishing a resubmission will notify the grantee of the action.

NOTE: Administrators will have resubmission permissions by default.

The applicant cannot initiate the resubmission. It must be requested by the grantmaker first.

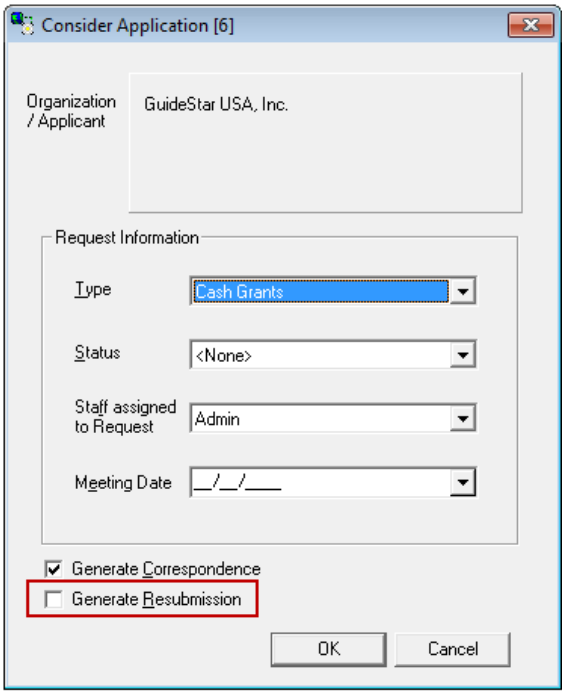
Initiating Resubmissions

There are two ways of initiating a resubmission request:

- During the Consider process, an IGAM user can check the **Publish for Resubmission** box.
- A GIFTS Alta user can also click the **Publish for Resubmission** option in the Actions tab menu when viewing an open Request or Requirement record.

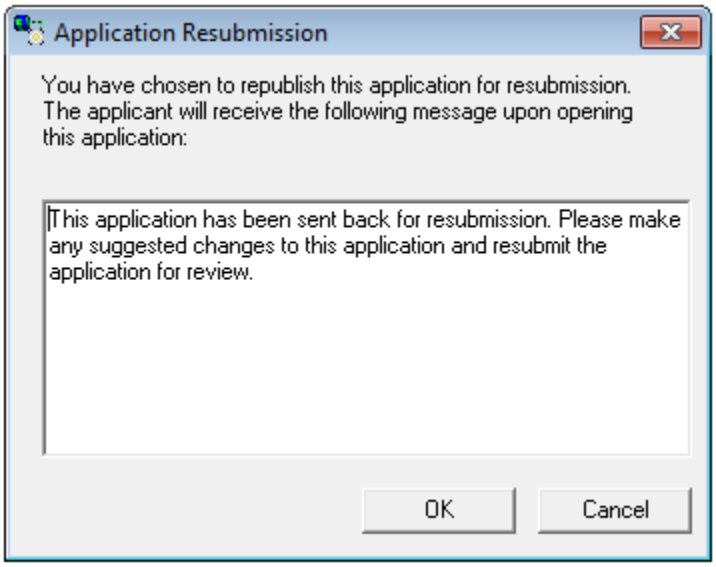
From IGAM

When a user is considering applications or requirements submitted online, there will be a new 'Publish for Resubmission' option available to them provided that there is an email address associated with the applicant. This will allow the user to send a message back to the applicant as part of the consider process. The application or requirement will still upload into GIFTS Alta.



NOTE: If the highlighted record does not have an associated email attached, this checkbox will be grayed out/disabled.

When the user Considers the application with the 'Publish for Resubmission' check box a form will open to allow them to customize a message to the applicant. This message will be included in an email that will automatically send to the applicant as well as be displayed when they open the resubmission application or requirement when logged into the IGAM site.



The default text message in the Text box can be changed in Form Designer.

"This application has been sent back for resubmission. Please make any suggested changes to this application and resubmit the application for review."

Processing the Resubmission

After clicking **OK**, the following occurs:

- For applications that have an account, a new application will be created on the server and associated with it.
    - The new application will be an editable copy of the selected one.
        - It will not matter if the original app's Form is inactive.
        - If the Form has been modified, these changes will not be reflected in the new application.
    - If the Form had a quiz or any authentication options (IRS lookup, Form Password), they will be removed/ignored.
    - All data that was on the original application will default to the new application:
        - Editable fields remain editable.
        - Read-only & hidden fields remain read-only & hidden.
    - The attachments from the original application will be ignored.
- The original application will be moved to the "View Historical Applications" folder.

- Its Disposition will display “Requested Resubmission”
- A new value for the Resubmission Requested Date will be stored and displayed in the grid
- A request will be created in GIFTS Alta

- A process monitor (batch) or a message box (single) will confirm the successful completion of this process:

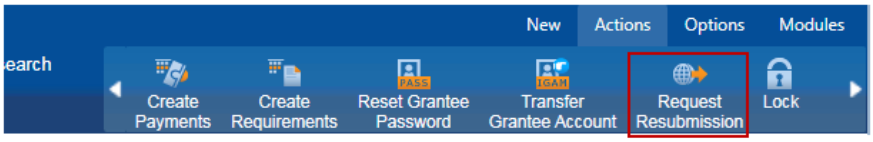
  A resubmission has been requested for Application [Server Side ID].

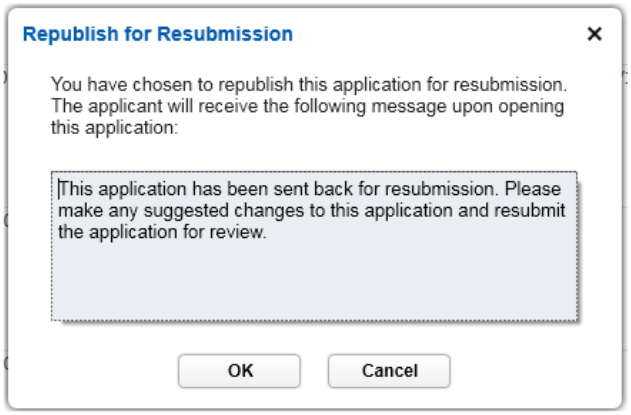
  - If the process was done in batch, and one or more apps did not have an account, this will be reported in the process monitor as well.

    A resubmission cannot be requested for Application [Server ID] because there is no account associated with it.

From Requests

A Resubmission action will be available in the Request > Action menu > **Request Resubmission** in GIFTS Alta.





The process will be the same as described during the Retrieval/Consider process except:

- If one of the following conditions is true, the resubmission action will not take place:
  - Request is declined.
  - Request has an open Stage 2.
  - Request is approved.
  - Request is not associated with an IGAM account.
- If the user chooses to publish for resubmission during the consider process, the **Generate Stage 2** button will become grayed out/disabled.

- If there is an open application for resubmission, the **Generate Stage 2** action will be grayed out.
- GIFTS Alta will determine which application is the most recently considered for that request, and use it to copy.
- An Activity record will be created and attached to the Request. This will be a type of history activity for "Resubmission Requested". It will have the following properties:

Field	Value
Organization ID	Organization for the Request.
Contact ID	Primary Contact for the Request
Request ID	Current Request
Staff ID	The user logged in to GIFTS Alta who performed the Action.
Done User ID	Same as Staff
Done Flag	Yes
Class	History
Type	Resubmission Requested
Due Date	Current Date
Done Date	Current Date
Notes	Resubmission requested for Application [Server ID]. A new Application [new Server ID] has been created.
Change User	User logged into GIFTS Alta who performed the action.
Change Date	Current Date
Branch	Branch ID of the Request, if Branch Security configuration.

From Requirements

The same Resubmission action will be available in the Requirement > Action menu in GIFTS Alta.

- If one of the following conditions is true, the resubmission action will not take place:
  - The Requirement has been flagged as done.
  - Requirement has an existing published requirement.
  - Requirement has an existing resubmission request.
- GIFTS Alta will need to determine which application is the most recently considered for that requirement, and use it to copy.
- An Activity record will be created and attached to the Requirement. This will be a type of history activity for "Resubmission Requested". It will have the following properties:

Field	Value
Organization ID	Organization for the Requirement.
Contact ID	Primary Contact for the Requirement
Requirement ID	Current Requirement
Staff ID	The user logged in to GIFTS Alta who performed the Action.
Done User ID	Same as Staff
Done Flag	Yes
Class	History
Type	Resubmission Requested
Due Date	Current Date
Done Date	Current Date
Notes	Resubmission requested for Requirement [Requirement ID]. A new Application [new Server ID] has been created.
Change User	User logged into GIFTS Alta who performed the action.
Change Date	Current Date
Branch	Branch ID of the Request, if Branch Security configuration.

Changes to Active Form/Deactivation

Currently, when making changes to an Active form, or deactivating a form, the user is asked whether to allow any in-progress applications to be submitted. This function does not apply to resubmission applications.

If the user wishes to remove the resubmission application, they must use the “Cancel Resubmission” action available in “View Historical Applications” or Request/Requirement record.

The same logic is applied for Automatic Deactivation.

Notifying Applicants

In addition to the instructional text placed on page 1 of the copied resubmission application, the user will be presented with an option to generate correspondence when using the resubmission action.

Cancel Resubmission

After requesting a resubmission, there will be an option in the “View Historical Applications” Action menu to “Cancel Resubmission”. This action will be available for both Requests and Requirements where a resubmission application has been published.

The Cancel Resubmission option is also available in the Actions menu in GIFTS Alta when viewing the Request or Requirement record. This action will be grayed out/disabled if the highlighted record (single record only) does not have a resubmission requested.

NOTE: When canceling a resubmission from GIFTS Alta, an extra check is done to make sure that the resubmitted application does not already exist as a Pending Application, in addition to not being submitted. If it does, an error will occur stating, "Resubmission application could not be canceled. Application has already been submitted".

When the action is selected, a form will launch where the user can customize a message for the applicant. The default text is stored on the server and can be changed in the messages section of the global form design.

- **Instructional Text**

  You have chosen to cancel the resubmission request. Applicants who attempt to access their Form will receive the following message instead:
- **Text box** (vertical scroll only). Initially, the default text will be as defined below; however, the text the user last entered will be remembered.

  This form is no longer available for online submission. We apologize for the inconvenience.
- **OK**/**Cancel** command

Retrieval & Workspace Changes

Both the Pending & History folders of IGAM will display a Resubmission column.

The Resubmission Requested Date will be available as a column in the History folder only.

Linking Resubmissions

Linked Organizations and Contacts will not carry over from the previous application, and the user will be asked to relink. Only the Request ID will carry over.

Considering Resubmissions

Since there is a Request ID associated with the Resubmission, the Request data will be updated with the data from the resubmission.

Requirements, upon retrieval, will be updated with the data from the resubmission.

Considerations for Application Transfer

When pushing for resubmission, the application will be pushed to the applicant associated with the latest submission.

Simplify for Online Applicants

NOTE: The Simplify database contains profiles of organizations that are registered as tax-exempt organizations with the IRS and requires an annual subscription to Guidestar.

What is Simplify?

Project Simplify grew out of recommendations from the Grants Managers Network's Project Streamline, which found that grantseekers wrestle with application and reporting practices that often are disproportionately burdensome. The main finding was that applicants fill out numerous applications for funding requests and have to re-key the same commonly asked fields in each application, often taking the applicant organization endless amounts of time.

Most applications include the same core elements, such as organizational data, contact information, a board of directors list, financial statements, and so on. Project Simplify is a *Data-sharing* and *Standards-setting* process that helps funders more easily access this frequently used information from grantees. *Standards-setting* creates a consistent format for core organizational information. *Data-sharing* happens through the GuideStar Exchange database, which already connects nonprofits with current and potential supporters. Nonprofits enter their core information once, and then it is automatically added to every grant application they complete for any participating funder. The service is provided at no cost to the nonprofits (grant applicant / grant recipient), however all funders must pay GuideStar an annual fee of $750 in order to access GuideStar Exchange data.

Introducing the ability to pull Guidestar Exchange data into applications through Simplify provides funders with the ability to have their applicants auto-populate their application forms.

How does Simplify work?

Applicants often apply for funding from multiple organizations. When they are filling out online applications they often have to re-enter standard information such as Name, Address, City, State, Tax ID, Contact information over and over again for each unique application they are filling out.

All nonprofits now can fill out a standard organizational profile on GuideStar's Exchange database (Project Simplify). For online applications that participate in the GuideStar Exchange database sync (Project Simplify), the applicant will be able to pull in their GuideStar Exchange database (Project Simplify) profile information and automatically fill in the matching fields on the application.

How do I enable Simplify for my online application forms?

First you need to purchase an annual subscription to Guidestar's Simplify database at http://www.guidestar.org/rxg/products/business-solutions/simplify.aspx.

You can then enable Simplify for your IGAM site by contacting MicroEdge Services at Services@Microedge.com.

Once enabled for your site, to enable Simplify on an application form the "Require applicants to enter U.S. Tax ID" option has to be checked in the application form setup **Properties**. If it is not checked, a Tax ID request will not be displayed to the applicant.

The entry of the applicant's Tax ID will, in turn, enable Simplify to pull data from the Guidestar Data Exchange.

For more information on the Simplify project check out www.simplifynow.org and the PowerME portal.

How does this change how online applications work?

With Simplify turned on, applicants will be given the option to identify their organization with an EIN number when filling out an application form and have up to date information from the Guidestar Exchange Database auto-populate corresponding fields in the form.

This will not only save time for applicants, but will also ensure that the data is accurate and up to date.

How will it look to an applicant?

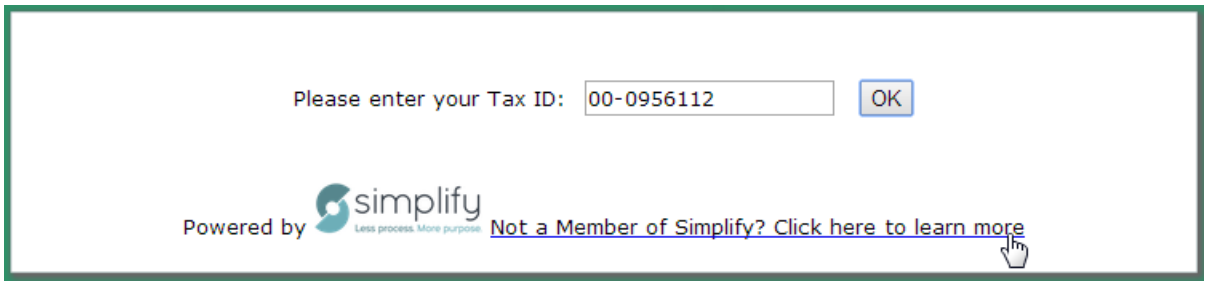
With Simplify turned on, applicants will be prompted to enter their Organization's Tax ID before the application form is opened. This prompt is identical to the window that comes up for an application form when Requiring Tax ID, except with a few extra items to accommodate Simplify.

NOTE: This prompt will not occur for Stage 2 application forms.

Keep in mind that not all applicants that arrive at this application will be Simplify members, and therefore will not have any Exchange Data saved with GuideStar. For this reason, there are multiple options when arriving at this window to accommodate different types of users/applicants.

Simplify Logo and Link

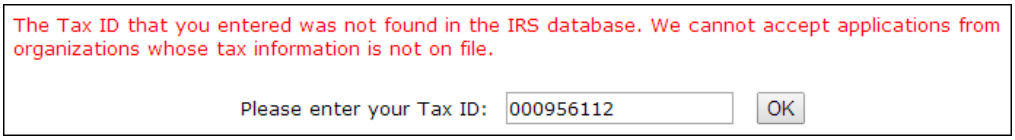
With Simplify on, below the Tax ID field will be the Simplify logo and a link to a site where applicants can learn more about Simplify.



NOTE: The 'Powered by' text before the Simplify logo will initially also be supported in French and Spanish.

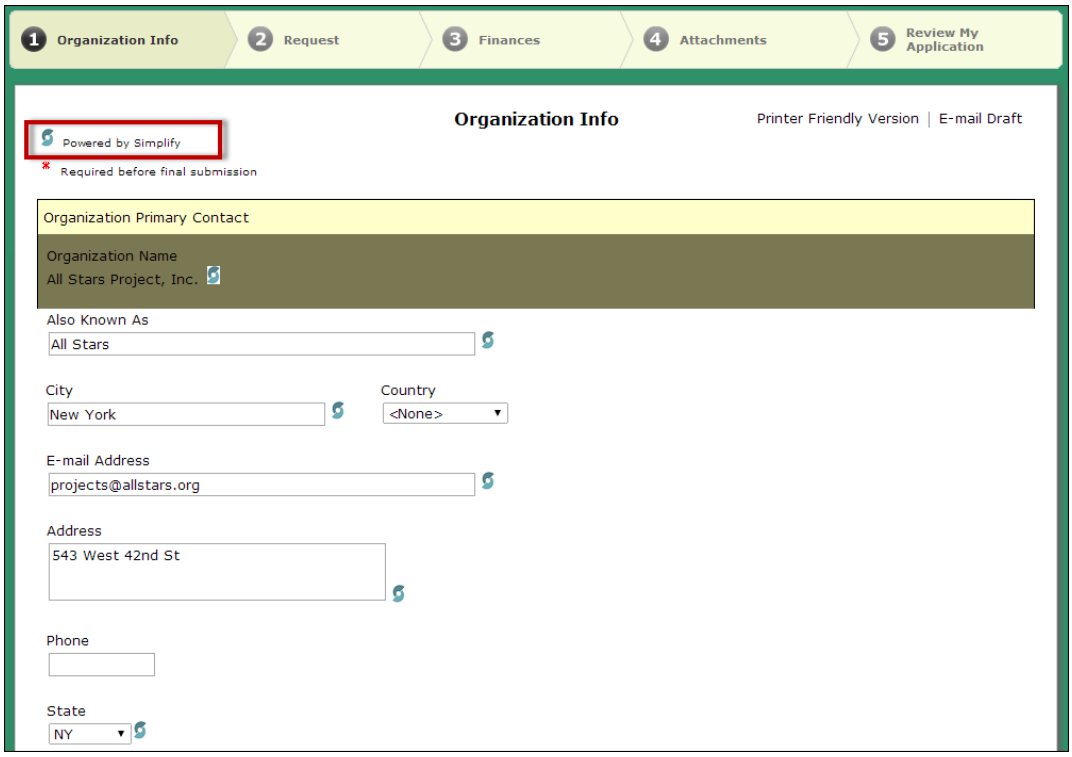
Procedure and Validation Rules:

- The applicant cannot skip the step to enter a Tax ID before beginning the application form.
- If the "Require Tax ID to be on file in the IRS database" option is also checked, this check will occur before the Simplify request gets sent (to make sure that the Tax ID is on the IRS database).
  - If the Tax ID entered is not on the IRS database, an error message will appear.

  - If the Tax ID entered is on the IRS database, the system will proceed to check if the Tax ID is on the GuideStar Exchange database.

  - If the Tax ID is valid, the applicant will be taken to the Eligibility Quiz, if it exists.
  - If there is no Eligibility Quiz, the applicant will be taken directly to the application form where data from the GuideStar Exchange and IRS BMF will have been filled in.
- If the "Require Tax ID to be on file in the IRS database" option is not checked, and the Tax ID entered is on the IRS BMF or GuideStar Exchange database, the system will continue to the eligibility quiz (if required), or go straight to the application form and pull in the pertinent exchange data as well as IRS BMF data IF available.
  - If the Tax ID is not found, an error message will appear.
  - Clicking **OK** without modifying the Tax ID will take the applicant to the quiz or application form. The fields on the application will need to be entered manually.
  - Clicking **OK** after changing the Tax ID will cause the system to recheck the Tax ID.
- Simplify data will take precedence over data found in the IRS BMF.
- A simplify logo will be displayed at the top left of an application form that has been successfully populated with exchange data.
- If a field being filled with exchange data is on the application more than once, fill all like fields with the same data.
- Simplify fields must be present on the application form to be populated, but may be hidden.
- Any fields filled in by Simplify can be overwritten by the applicant if needed.



How do GuideStar Exchange fields match up with GIFTS Alta and GIFTS Alta fields?

The following tables list the fields available through GuideStar Exchange, along with their matching field in the GIFTS Alta or GIFTS Alta database.

NOTE: Fields listed in Purple do not exist in the standard GIFTS Alta and GIFTS Alta database. Clients will have to create custom fields using the GIFTS Customizer or Blueprint module with the specifications included in order to match the fields in the Simplify database.

Organization Fields

GuideStar Field	Field in GIFTS Alta/Online Database
EIN	Tax ID
Organization Name	Name
Also Known As (AKA)	a.k.a.
Doing Business As (DBA) name	Record Type: Organization Field Name: Doing_Business_As Standard Label: Doing Business As Type: Text Maximum: 50
Formerly Known As (FKA) name	Record Type: Organization Field Name: Formerly_Known_As Standard Label: Formerly Known As Type: Text Maximum: Long Text
Government Registered Name	Legal Name
Government Issued Ruling Year (The year the recognizing government registered this organization as a nonprofit.)	Record Type: Organization Field Name: Government_issued_ruling_year Standard Label: Government Issued Ruling Year Type: Long Number, No Decimal
Reason for Nonprivate Foundation Status	Record Type: Organization Field Name: Reason_for_Nonprivate_Foundation_Status Standard Label: Reason for Nonprivate Foundation Status Type: Long Text
Incorporation year	Record Type: Organization Field Name: Incorporation_Year Standard Label: Incorporation Year Type: Long Number, No Decimal
Mission Statement	Record Type: Organization Field Name: Mission_Statement Standard Label: Mission Statement Type: Long Text
Geographic Areas Served Narrative	Record Type: Organization Field Name: geographic_areas_served_narrative Standard Label: geographic areas served narrative Type: Long Text

GuideStar Field	Field in GIFTS Alta/Online Database
Impact Statement	Record Type: Organization Field Name: Impact_Statement Standard Label: Impact Statement Type: Long Text
CEO Comments (Text provided by the NPO explaining, from the NPO's CEO's perspective, the mission, activities, and impact of the NPO.)	Record Type: Organization Field Name: CEO_Comments Standard Label: CEO Comments Type: Long Text
Funding Sources	Record Type: Organization Field Name: Funding_Sources Standard Label: Funding Sources Type: Long Text

Telephone Fields

GuideStar Field	Field in Gifts Database
Primary Phone Number	Phone
Primary Fax Number	Fax

Address Fields

GuideStar Field	Field in Gifts Database
Primary Address (line 1)	Address
Primary Address (line 2)	Address
City	City
State/Province/Territory	State
Country	Country
Postal Code	Postal Code
Postal Code extension	Record Type: Organization Field Name: postal_code_plus Standard Label: postal code plus Type: Long Number, No Decimal

URL Fields

GuideStar Field	Field in Gifts Database
Website URL	WWW Address

Email Fields

GuideStar Field	Field in Gifts Database
Primary Email Address	E-mail

NTEE Fields

GuideStar Field	Field in Gifts Database
NTEE Code	Record Type: Organization Field Name: NTEE_code Standard Label: NTEE code Type: Text

Financial Fields

GuideStar Field	Field in Gifts Database
Fiscal Year Start Date (First day of the NPO's fiscal year.)	Record Type: Organization Field Name: fiscal_year_start Standard Label: Fiscal Year Start Type: Date
Fiscal Year End Date (Last day of the NPO's fiscal year.)	Record Type: Organization Field Name: fiscal_year_end Standard Label: Fiscal Year End Type: Date
Contrib Gifts Grants (The amount of money donated via contributions, gifts, and grants to this organization.)	Record Type: Organization Field Name: contrib_gifts_grants_amount Standard Label: Contrib Gifts Grants Type: Currency
Program Service Revenue (Program service revenue including government fees and contracts.)	Record Type: Organization Field Name: program_service_revenue_amount Standard Label: Program Service Revenue Type: Currency
Membership Dues	Record Type: Organization Field Name: membership_dues_amount Standard Label: Membership Dues Type: Currency
Special Events Net Income (Net Income acquired from special events not included as part of programs.)	Record Type: Organization Field Name: special_events_net_income_amount Standard Label: Special Events Net Income Type: Currency
Other Revenue Description	Record Type: Organization Field Name: other_revenue_description Standard Label: Other Revenue Description Type: Long Text
Other Revenue	Record Type: Organization Field Name: other_revenue_amount Standard Label: Other Revenue Type: Currency
Total Revenue	Record Type: Organization Field Name: total_revenue_amount Standard Label: Total Revenue Type: Currency

GuideStar Field	Field in Gifts Database
Program Expenses	Record Type: Organization Field Name: program_expenses_amount Standard Label: Program Expenses Type: Currency
Administration Expenses	Record Type: Organization Field Name: administration_expenses_amount Standard Label: Administration Expenses Type: Currency
Fundraising Expenses	Record Type: Organization Field Name: fundraising_expenses_amount Standard Label: Fundraising Expenses Type: Currency
Payments to Affiliates	Record Type: Organization Field Name: payments_to_affiliates_amount Standard Label: Payments to Affiliates Type: Currency
Other Expenses Description	Record Type: Organization Field Name: other_expenses_description Standard Label: Other Expenses Description Type: Long Text
Total Expenses	Record Type: Organization Field Name: total_expenses_amount Standard Label: Total Expenses Type: Currency
Total Assets	Record Type: Organization Field Name: total_assets_amount Standard Label: Total Assets Type: Currency
Total Liabilities	Record Type: Organization Field Name: total_liabilities_amount Standard Label: Total Liabilities Type: Currency
Net Assets Fund Balance EOY (Net Assets or Fund Balance at the end of year.)	Record Type: Organization Field Name: net_assets_fund_balance_eoy_amount Standard Label: Net Assets Fund Balance EOY Type: Currency

Contact Fields

NOTE: Only Organization primary contact fields in GIFTS will match to the Primary contact fields in the Simplify database.

GuideStar Field	Field in Gifts Database
Prefix (Title that precedes a first name or an initial. For example, Mr., Mrs., and Dr. are name prefixes.)	Prefix
First Name	First Name
Middle Name	Middle
Last Name	Last Name
Suffix (A part of a name that follows the last name. For example, Jr. and Sr. are name suffixes.)	Suffix
Title	Title
Status	Record Type: Contact Field Name: status Standard Label: Status Type: Text
Start Month	From
End Month	To
Email Address	E-mail
Compensation	Record Type: Contact Field Name: Compensation Standard Label: Compensation Type: Currency
Bio	Record Type: Contact Field Name: Bio Standard Label: Bio Type: Long Text
Primary Phone	Phone

Update to UTF-8 Character Encoding

In order to bring IGAM up to modern international standards, it has been updated to support UTF-8 browser character encoding which is the world standard for representing all languages.

Please note that GIFTS Alta does not support UTF-8 and certain international characters may not appear as entered on IGAM application/requirement forms.

Known Issues Fixed in GIFTS Alta 1.7

The following **known issues** have been fixed in this GIFTS Alta 1.7 release:

Case #	Description
174650	Client requested the same “Batch Link Document” wizard that was in GIFT 6.4 in Alta.
215863	Payments were linking to wrong contacts when Request Contact was changed.
250906	Tax Status Verify action was difficult to use on a machine running 125% display setting.
251616	Focus of ribbon menu needed to remain the same after an action was completed.
251788	Client reported row height of the grid set in Taskboard was reset every time.
251926	Client requested that next upgrade reduce the number of clicks needed to perform each process.
254260	Client was getting error at random when adjusting the column width of her view.
255943	Response Summary/Notes field did not display for internal users on Review Stages that omit that field.
256282	Client requested that when opening a Requirement with 1 document that the attached file open for display.
256497	If a user switched Request Types while the tabs were being generated on a loading Request Edit form, the system would create duplicate tabs of the Custom Fields in the position on the edit form.
257912	Update GIFTS Alta to remember the adjustments made to the window size/screen position, column order, column width and row height of the search function in the primary relationship cards.
257913	Client requested the ability to change the default search criteria (begins with) or for GIFTS Alta to at least remember the last selection.
257916	After selecting the search criteria in a full search, allow user to hit Enter on the keyboard to perform the search.
258071	Alta upgrade failed if admin user was inactive.
258096	Client requested the ability to select and print multiple External documents from GIFTS Alta.
260368	Client did not feel GIFTS Alta was efficient when creating payments as it required both keyboard and mouse.
260859	Needed an option to keep current Project start and end dates when approving Requests in batch.

Case #	Description
262389	Error displayed when selecting “Advance” search option when running a Financial report with specific criteria.
264756	Client requested Email plus options be available when working inside of an open Request record.
264760	Recalc Utility option for Approved Requests did not fix Number of Payments or Balance.
265028	With DPI set to 125%, GIFTS Alta (in maximized mode) goes over the Windows Task bar and does not allow client to switch between applications.
265028	125% DPI and Windows Basic desktop appearance caused Alta to hide the taskbar.
265145	Since IGAM 5, after performing the Linking process, the highlighted record loses its focus.
265222	Fonts with the prefix '@' needed to be hidden from ad hoc reports.
266427	Clients custom date fields were not holding views date formatting when merging document.
266669	SQL Query timing out on large databases when using OR statements and codes.
266847	Adding a column in a view with 'Apply', then removing the same column with 'Apply' did not update the view in Alta 1.5.1 and 1.6.
267564	Client reported that Affiliations were not listing correctly when selecting for payment correspondence.
267706	The Action menu kept "twitching" when selecting the documents in Workspace with 125% DPI.
267706	The Action ribbon menu for Reviews flickers with 125% DPI.
267946	Requirement Forms, HTML tags were merged into the field after retrieval.
268031	Alta Upgrade failed to upgrade the database if Admin user was inactive.
268051	Client requested to add back the ability to Export and Print for Quick-Charts in Alta.
268169	Client reported that Long Date format was exported to Excel in Short date format.
268387	The displayed search parameters in Alta 1.6 did not update to reflect which search parameters were removed after 'Last Search' was clicked.
268495	IRS 990 reports did not include required secondary tax status.
268498	Removing activity but keeping the document resulted in an error.
268940	AltaUpgrade.exe from GIFTS 6.5 to Alta 1.6/1.6.1 did not upgrade DB properly.

Case #	Description
269392	Client reported that with 125%, the user lost the User menu (Alta man) icon. Happens with a user with a monitor less than 19" or if you have a laptop with the screen of < 19"
269392	User menu was not visible when using DPI at 125% and a monitor that is < 19".
269506	Client reported that with 125% DPI settings, the drop down for State and Country was shown on the top-left section of the screen. Also, the field was not refreshed to reflect changes made.
269747	New ribbon menu flickered for Requests when using 125% DPI.
269747	Error displayed on dashboard with DPI set to 125%. Inability to move a part.
270101	Running Contacts ad hoc report with State / County in Search criteria resulted in an error.
270305	Running Contacts Standard report with State / County in Search criteria resulted in an error.
270971	Client reported that they were receiving errors when using Approval Date in the Search criteria for Volunteer Gifts Reports in Alta 1.6.
271050	GFW_Views_Columns was unable to handle custom field names over 50 characters in SQL, while Admin.exe allowed 63 characters in Customizer.
271389	Proxy password for Tax Status was being encrypted twice instead of encrypt/decrypt.
271934	Client reported that transfer related requirements using Alta were not working in Alta 1.6.1.
272319	Required asterisk did not show up for Pending Request when it was setup for Required When Approving Request.
272320	In Alta, there was no indication stating that this current grant was amended (like in GIFTS). Also, the approval message on the top displayed incorrect information.
272857	Adding a column to a view with a saved search re-ran the saved search even if other search was run after applying view.
272897	When set to "Sum", dashboard Gauge parts with Coding Sheet in the search would add a payment amount for every instance of the parent code on the Request.
272904	Issues with using Quick Find occurred during the Linking Organization process in IGAM.
273492	Request Custom fields displayed multiple times if placed on Request Forms of varying types and after blueprint upgrade.
274941	Changing the local/other currency name field in a Request did not change the Rate Date of the currency exchange.

Case #	Description
275039	Primary Code flag did not filter records while searching.
275258	Error trying to print details from Tax Status Lookup/ Import.
275330	Custom Calculation field in ReviewerConnect were not being hidden.
275633	Payment Fund Donor gave error in view when track amount percentages was enabled.
276331	In IGAM Requirements forms, the 'Show GIFTS Value' field was not populating.
276423	Putting a payment on hold displayed the incorrect date before save.
276502	Activities View - the format options for Start Time did not function.
276611	The Average and Sum filters in dashboard parts were showing the same thing.
277166	Custom date fields were swapping the numbers around for countries using non-default date formats.
277599	Search form was missing in Requirements filter and was adding OR for next query.
277599	Taskboard - date filters that were set to "is missing" disappeared when switching from basic to advanced search.
278615	Client could not access Guidestar from Payments or Requests, only Organizations.
278617	Any manual input in the Correspondence CC field was not saved to letter.
278617	Could not write in Correspondence CC field unless contact was chosen from list.
278753	Alta chart - Request code displaying percentage could not be displayed.
278763	Calculation field - using two "number - no decimal" fields showed only whole numbers in view.
279392	Customizer - Adding web clippings to non-default forms did not show a link.
280628	Error displayed when running the Reminders engine on UK settings.
280710	When attempting to change user but entering incorrect password, Audit data in a Request incorrectly showed that new user when making changes.
280838	Alta was using the incorrect search query for "End of Period Batch".
281111	Using a login ID with a space in it, and trying to open GIFTS Alta from the admin module resulted in an error.
281160	Row height was not retained when modified.
281193	Switching users did not clear the search field.

Case #	Description
281204	Client was getting timeout for searching on a custom field with 75k Requests.
281213	When performing "Last Search" after a full search that uses the "any date between" option, only one date field showed instead of two.
281263	Codes table in Advance search was displaying duplicate results.
281404	For Contacts with multiple affiliations, generating correspondence caused their address to be changed to their main address.
281441	Tasks that query mail activities in large databases caused GIFTS Alta to freeze.
281533	Users in a group that do not have the "Run Reports" permission enabled could still run reports.
281720	Long search queries needed to allow word wrapping instead of being truncated.
282125	Link Plus did not work with null password and 'Require password' enabled.
282484	Client reported that the 'New Template' window displayed oddly on client's workstation (Per DDA compliant policy, they should be able to use the software in any display settings.)
282821	Internal review 'Received date' was not showing for completed reviews.
282925	Exporting a view with multiple codes was super slow for client.
283435	Approving batch requests changed their Project Start Date to today.
285225	Saved search did not work when created from Last Search.
285522	When updating Contact primary address and Use Organization is selected, the 'Do Not Update' option on change was ignored.
285597	Gauge - markers were being rounded so numbers were displaying duplicates.
285599	Dashboard gauge part - number of markers was stuck at 10.
285604	Reviewer - unable to submit a review when GIFTS permission was disabled for approving / declining request.
285641	1.61 / 6.5 was allowing passwords > 25 characters with no error message.
285879	Calculated fields were not able to be created with field names greater than 53 characters.
285900	Calculation custom field - using organization: annual budget as calculation was broken.
286221	Date and month were switched in Due Date when using Publish to Web function was used.
286395	Alta did not allow removing a commitment from a scheduled payment, only change.

Case #	Description
286539	Client reported that the permission setting 'Request - Change Status' still worked when it was unchecked.
287644	Taskboard - Adding a task and sorting it with two Request fields caused an error.
288534	LinkPlus was not installed properly on a Windows 64-bits machine with 32 Bits Outlook.
288711	Letter Library (letter_lib) Create_User_ID field was set to 0 disabling users from updating correspondence letters with this invalid ('0') user.
288777	Client reported getting Object reference error on Requests and Payments due to system not being able to handle possibility that a field name did not exist.
288944	Alta Internal Review Approval Wizard needed to prompt if reviewer cancels after Submit.
288962	Oracle standard reports did not work with Alta 1.6.1.
289057	Custom fields appeared multiple times when adding columns to ad-hoc reports (client specific).
289196	Client received error when searching for contacts.
289210	Client reported that IGAM applications Amount fields were populating with value 0.0000 when set to GIFTS Value and the Gifts / Alta value was $ 0.00.
289938	Organization's Primary Contact's Primary Phone column did not populate in an Ad Hoc report when it was one of several combined columns of an Organization view.
290187	Help files were not accessible on Citrix - Alta 1.6.1.
290258	Client was getting different results based on Advanced or Full Search.
290349	Client reported that her Word limit and Word counter were no longer available on her IGAM Form for her custom long_text fields.
290392	Request Calculation of various custom fields that should express percentages showed 100 times the expected figure.
291991	Client's basic filter was displayed incorrectly when performing a search then clicking "Refine Search".
293126	Client's calculated fields were not displaying correctly in the workspace in Alta 1.6.1.
294376	Client could not complete the Publish to Web action due to incorrect proxy settings in GIFTS Alta.
294449	For Batch email of Documents there was no Contacts default option.
295336	Long text fields were not populating on Request Blueprint forms.

Case #	Description
215564, 215491	Clients wanted to be able to open batched merged documents in Alta all at once and not individually.
249411, 181973	When batch merging in Alta, the separate documents no longer opened in one document window for editing.
289018, 293173	Client reported that after upgrading to 1.6.1, Alta Links no longer worked.

Known Issues Fixed in IGAM 6.0

The following **known issues** have been fixed in this IGAM 6.0 release:

ID	Title
271002	Resolved issue with missing IGAM application if the backup fails, and the write/update to the original fails.
288353	Client was getting error when considering a IGAM application “Cannot insert duplicate key row in object “dbo.Contact_Ext’.
286498	IGAM deactivation message truncated and defaulted to system/default message if longer than 255 chars.
210119	Client’s IGAM application CONTACT links were updating Contacts without checking the “update GIFTS” option when linking.
252962	Contact custom boolean fields were ignored when set to Required.
253455	Groups of fields in IGAM forms caused the Title of the group to appear twice to the applicant if the groups started with a hidden field.
276469	Non US clients were not able to utilize the Deactivation Date when creating a new form.
281386	Requirement Forms - code percentage fields were not populating from GIFTS Values.
284838	IGAM Application XML beccame out of sync with actual attachment files.
273407	Client reported that the # attachments column in the submitted applications report did not count attachment field attachments.
274084	Currency fields failed to render label correctly if not filled in when field was marked as Required.
210119	Links were updating Contacts without the user checking the “Update GIFTS” option when linking.
277802	Default Forgot Password text needed to be changed to match button.
279876	Contacts were not updating properly when linked from IGAM.
278655	Attach application feature with email application was not consistent/did not

	work.
279667	Client reported that when filling out the IGAM login with email and password -> ENTER takes you to create an account when New Applicant is a button instead of link.
289752, 264947	Resolved issue with user being able to Submit or Save and Finish later when previewing application forms.
27200	Resolved issue with no Form Title, Stage 1 Form, or Stage 2 form options being available when Sorting.
278655	Client reported that the attach application check box did not function.
279667	If the New Applicant link was set to button, it would be the focus when hitting the Enter key.
287935	When using Safari for submitting an IGAM application, dates were displaying only in US date format (mm/dd/yyyy) even though Regional Settings and related date settings were set to UK.
288285	Code percentage was not enforced, allowing submission when validation should prevent
288559	With Oracle backend, Applications.Country value >20 chars did not truncate which caused insertion into Applications to fail.
287879, 288020, 288614	IGAM retrieval did not recognize file with same name as in application xml.
286069	Error when linking organization if the Org name contained brackets and a space.
288879	Resolved issue with incorrect Account URL populating the Account URL merge field.
282968	Resolved issue with error handling in Attachments.
289419	Hidden fields were not hidden when there was a field to the right of it.
288597	Chrome input fields extended past frame on Account Login.