MicroEdge

GIFTS® Alta

User's Guide

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Welcome to GIFTS Alta

Thank you for choosing to upgrade to GIFTS Alta!®

GIFTS Alta is the premier system for tracking grants from the time proposals are received until the final payment is made. GIFTS Alta 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 Alta 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.

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, 9:00 A.M. to 8:00 P.M. Eastern time. You may contact MicroEdge's Technical Support Specialists as follows:

Phone
1-877-704-3343

Fax
(212) 757-1784

E-mail
helpdesk@microedge.com

Web

Go to www.microedge.com and login to GIFTS PowerME where you can search our extensive knowledge base and/or create a new case for your issue.

NOTE: To access the Web, you must have an Internet connection and a frames-enabled browser (Microsoft Internet Explorer 8.0 or later, or FireFox 25.0 or later).

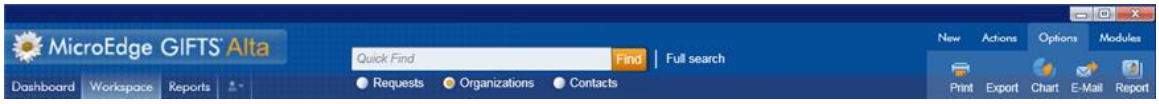
For details about our support policies, please refer to the MicroEdge Client Resource Guide. If you have any questions regarding the Maintenance and Support Program, please contact our Client Administration Representative at 1-800-899-0890, option 6, then 2, who will be happy to assist you.

The GIFTS Alta User Interface

The GIFTS Alta User Interface is divided into four major area as described briefly below.

The Header Area

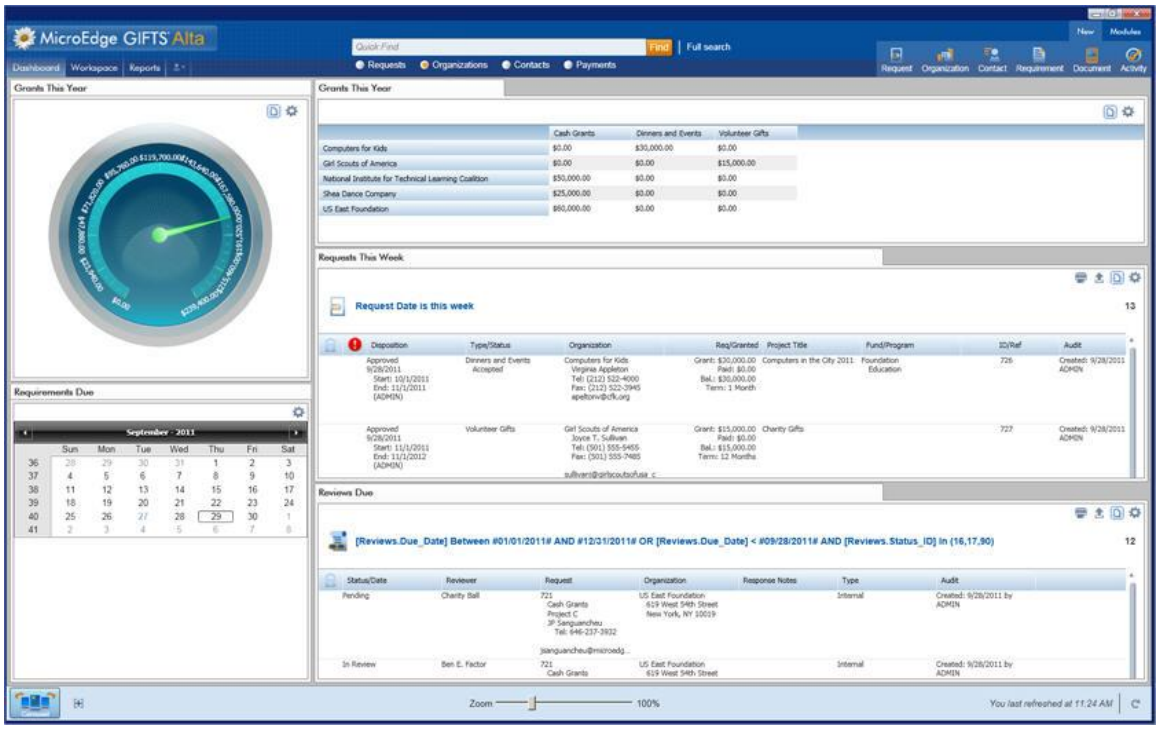
This new area consists of many menu options necessary to work with various records in GIFTS Alta.



See The Header Area for complete details.

The Dashboard

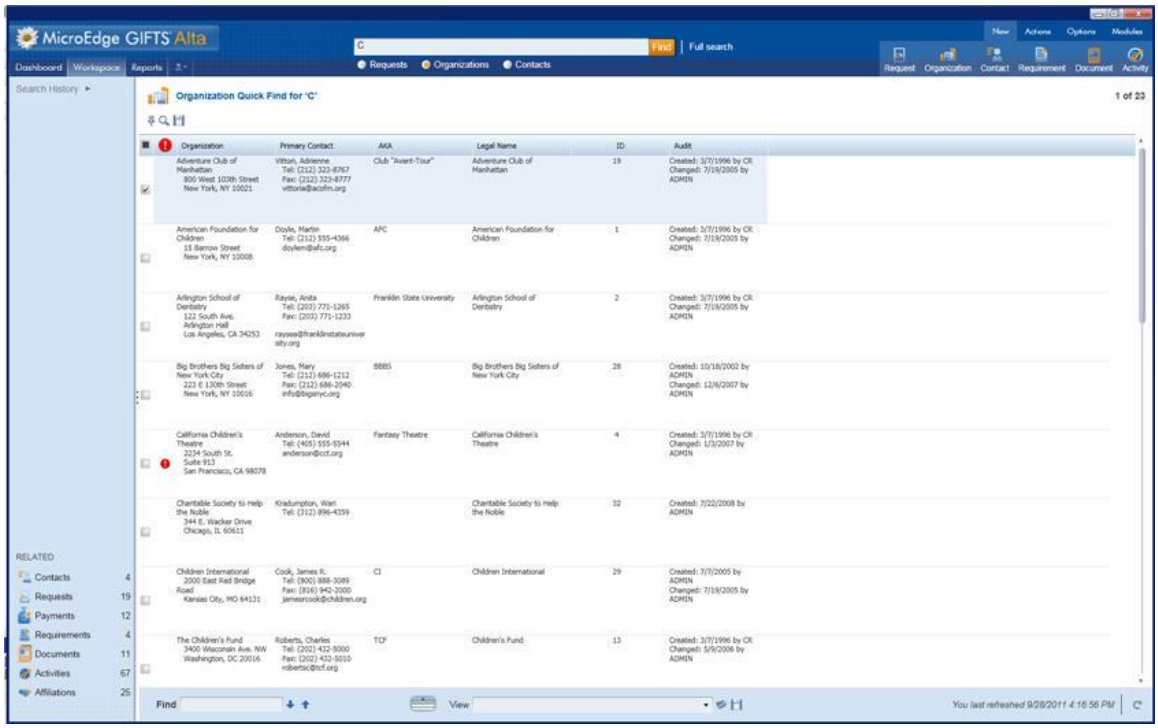
This new GIFTS work area is where you can create information panels called dashboard parts that allow you to filter and summarize all the data coming into your system.



See The Dashboard for complete details.

The Workspace

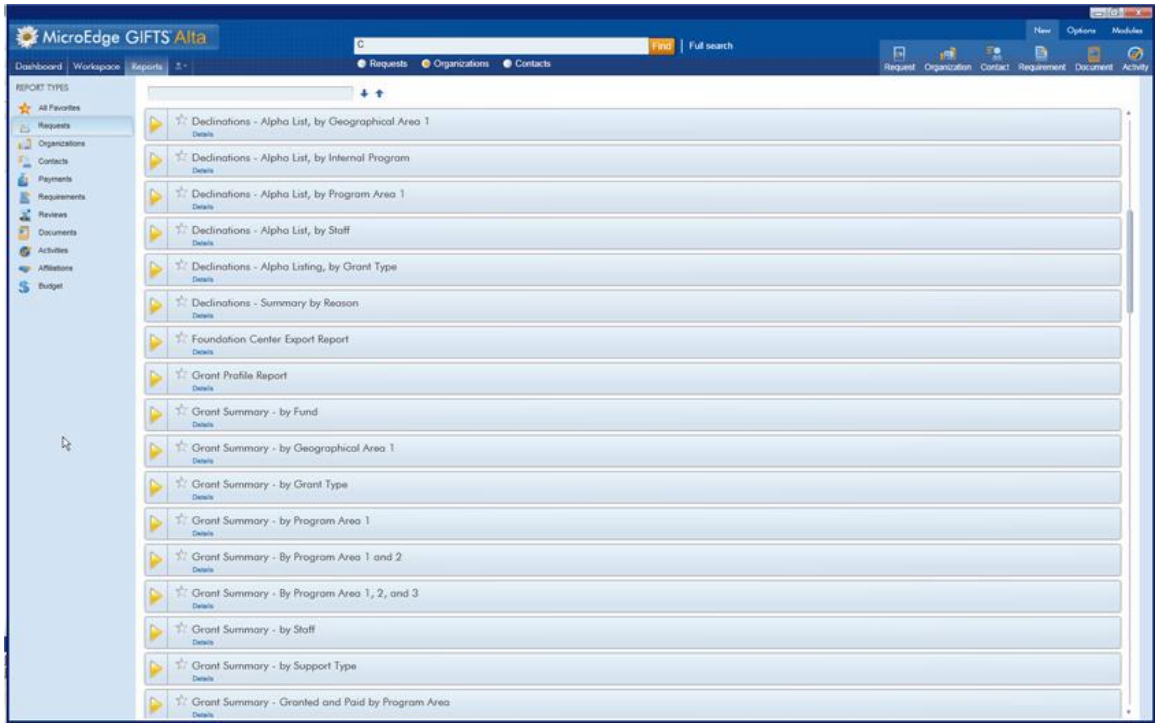
This Workspace has replaced the GIFTS Organizer as the main work area.



See The Workspace for complete details.

The Reports Library

The Reports Library is place to go for any of the standard reports available in GIFTS. It will also give you access to all Saved Ad Hoc Reports that either belong to you or are marked as Public.



See The Reports Library for complete details.

Help Topic Summaries

Most of the information in this help file is task oriented, and includes step-by-step instructions for using GIFTS.

- Maintenance and Support Program
- The GIFTS Alta Interface introduces you to the major areas of the new GIFTS Alta interface.
- The Header Area goes into detail about the new header area common to the main work areas of GIFTS Alta, including the logo functions, toggle buttons, user menu, search tools, and ribbon menus.
- Working with the Dashboard describes the newest and one of the most useful areas in GIFTS Alta. The Dashboard is where all the data entered into GIFTS can be consolidated, filtered, and presented to users in quick, easy to understand dashboard parts.
- Working with the Workspace describes the most important tool in GIFTS. The Workspace 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.

- Using Edit Forms describes the new and improved Edit Forms of GIFTS Alta.
- Searching for Data in GIFTS discusses more advanced topics related to searching using the Query Builder and Advanced search forms to find data that you've stored in GIFTS.
- Working with Reports introduces you to the redesigned Reports Library and Ad Hoc Reporting from the Workspace. Ad Hoc reports can be printed, exported, modify to suit your needs, and saved to the Reports Library for future use.
- Working with Organizations - All of the organizations that request funding are entered into your database as Organization records. This topic details how to enter and maintain Organization information, including addresses, telephone numbers, tax status information, and classifications.
- Working with Requests - 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 topic explains how to track your Requests as they progress through your workflow.
- Working with Payments - When you award a grant, GIFTS creates a Payment Schedule that includes information about each individual Payment that will be paid. This topic describes how to work with your Payment Schedules, covering important topics like contingent and voided Payments.
- Working with Requirements - Most grant makers have certain requirements—such as progress reports or site visits—that are placed on grantees when grants are awarded. This topic describes the use of Requirements for both grants and payments.
- Working with Contacts describes the process of entering and maintaining Contact information, including address, telephone number, and background information.
- 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.
- Working with Activities describes how to track events that relate to your grant making—such as telephone calls and meetings.
- Working with Documents 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.
- Generating Correspondence describes how to generate correspondence and write-ups that include your grant making data. You can produce both printed letters and e-mail messages.
- Multi-Currency in Requests and Payments - This topic explains how to track Request and Payment amounts in another currency, using exchange rates stored in the GIFTS Administrator Module.
- GIFTS Alta Extensions describes how to use GIFTS Alta Link and Reminders which are optional installations.

- About Tax Status describes how to use the Tax Status Lookup and Verify features in GIFTS Alta to make sure the tax information for organizations in your database are up to date.
- About Watchlists describes how to use the Search Watchlists option.

Basic Instructions

Read this section to familiarize yourself with the basic features of GIFTS Alta.

Managing Your Password

Working with Tables and Records

Data Entry

Working with Coding Sheets

Auto Spell Check on Text and Memo Fields

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 User menu, choose **Change Password**. You are prompted to enter your Old password.
3. Leave the **Old Password** field blank, if 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.

Working with Tables and Records

This section describes how to work with the various tables and record types presented to you in GIFTS Alta.

Workspace Record Types

The Workspace works according to record types which represent the way in which your data is stored in the GIFTS Alta database.

Whenever you run a search, whether it be through Quick Find or Full Search, you'll need to select a Record Type.

The most common Record Types include:

- Organizations
- Contacts
- Requests
- Payments
- Requirements
- Documents
- Activities
- Affiliations

The following record types are generally available to GIFTS users. (Users with optional Modules may see additional record types).

- 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.

- Affiliations

  Affiliations are the key to Contact management in GIFTS. An Affiliation links a Contact to either an Organization *or* a Request, and describes the Contact's *specific* relationship with the Workspace or Request. A Contact can be affiliated with any number of Organizations and Requests, allowing you to note all relationship played by your Contacts.

- 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.

- 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.

- 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.

- 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.

- 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.

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

Table Displays

GIFTS often displays information in the form of a table made up of rows and columns in the Workspace when displaying multiple records. This is most frequently seen on the search results page.

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

- The color of the row(s) change from white to blue when they are selected.
- Each column has a title that appears in the top border of the table.
- Along the top and left borders of the grid, thin lines divide each item.
- On the left side of the grid, a checkbox indicates which item is currently selected.

Re-sizing Columns and Rows

You can change the width and height of the columns and rows. 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.

↕ vertical resize or ↔ horizontal resize

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.

NOTE: In GIFTS Alta, columns cannot be hidden. You can use the horizontal resize option to minimize the column.

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.

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 displayed in a search results page, you can do one of the following:

- click the Select All button in the column headers row
- press **CTRL+A** to select all records displayed

All of the records in the search results page are highlighted.

Opening Record Edit Forms

The pages which allow you to view or modify a record's information are called Edit Forms in GIFTS Alta. To access a record's edit form, simply double click on the listed record.

If you have multiple records checked on a list, when you double -click on a record the edit form will display at the bottom the number of records selected and Back/Next links for easy navigation.

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.

Data Entry

This section of the GIFTS help file 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. (You can check your spelling, too.) 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:

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.

Auto Spell Checking of Text Fields

The following fields in GIFTS Alta edit forms have an auto spell check function. Words which are detected as mistyped will be underlined in red. Right-clicking on the underlined word will present you with possible options to fix the error.

Record Type	Fields with Auto Spell Check
Activities	Long Notes
	Notes
Affiliations	Long Notes
	Notes
Contacts	Notes
Documents	Long Notes
	Notes
Matching Gifts	Description
Organizations	Background
	Tax Status Notes
Payments	Notes
Requests	Complete Notes
	Declination Notes
	Evaluation
	Meeting Minutes
	Project Description
	Project Title
Requirements	Long Notes
	Notes
Reviews	Long Notes
	Response Notes
Volunteer Gifts	Description

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 Alta verifies that the dates you enter exist. For example, you cannot enter February 29, 2013 because 2013 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.
- Click the calendar icon to open the calendar tool and select a date.

NOTE: The arrows on top of the calendar allow you to go to the previous or next month.

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 your system preferences. For more information, please refer to the *GIFTS Administrator's Guide*.

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 drop-down or link 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 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.

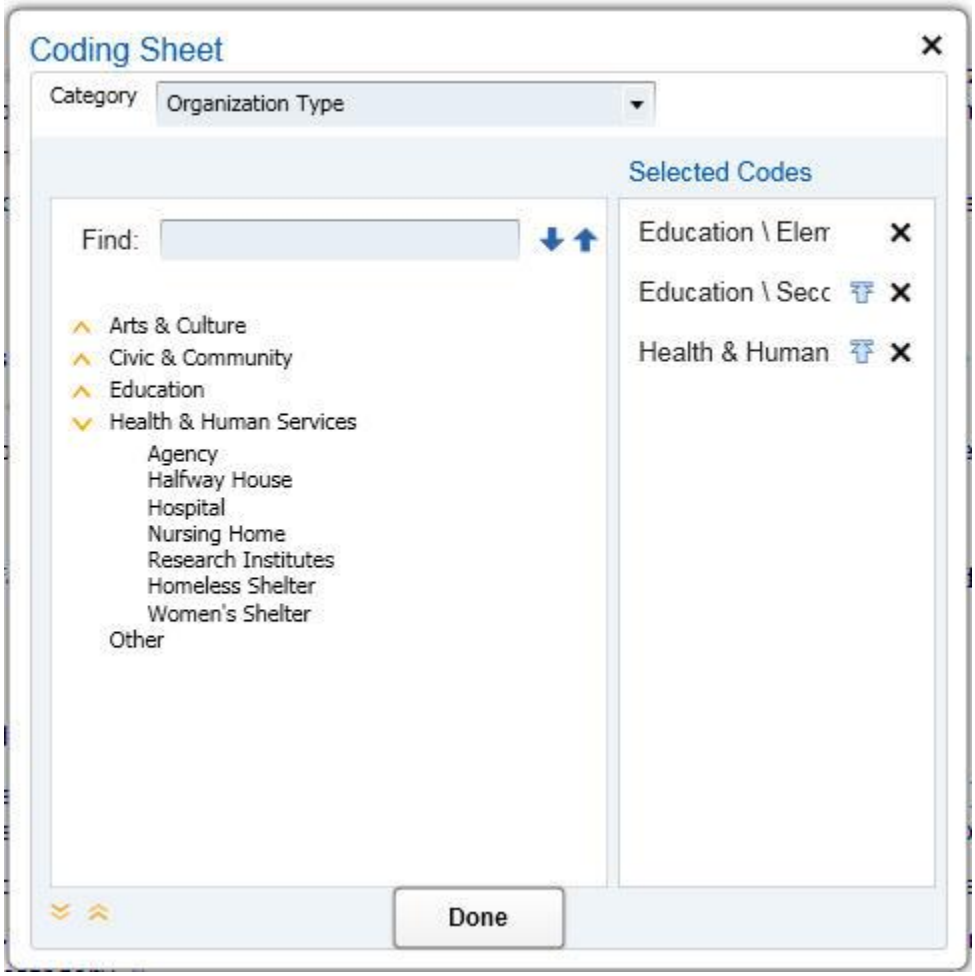
Coding Sheets are also displayed when you search by Coding Sheet data using the Quick Find.

The following topics summarize the properties of coded categories and describe how to add classifications to a Coding Sheet:

Adding Codes

How codes are displayed on an Edit Form depends on the number of values allowed for that specific code table. This can be modified in the GIFTS Administrator module.

- If only one value is allowed, the code field will be displayed as a drop-down list.
- If multiple values are allowed, there will initially be a link displayed. When you click the link, a Coding Sheet window will popup with eligible values. Double click on code values to the left to move them to the selected Codes list. The system will advise you when you have reached the maximum number.



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 next to the code values 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.

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 at the top of the list on the Coding Sheet, and the *secondary codes* are displayed below.

To remove a code value, click the X to the left of the value.

To move a code value up the list, click the up arrow icon next to the value.

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.

Code Values in the 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.

Code Values in 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.

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.

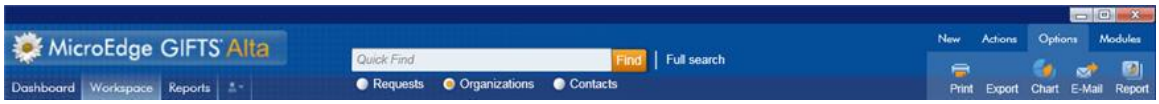
Auto Spell Check on Text and Memo Fields

If enabled in the User Preferences, selected fields will have automatic built-in spell check.

They are listed here for the individual record types:

Record Type	Field with Auto Spell Check
Activities	Long Notes
	Notes
Affiliations	Long Notes
	Notes
Contacts	Notes
Documents	Long Notes
	Notes
Matching Gifts	Description
Organizations	Background
	Tax Status Notes
Payments	Notes
Requests	Complete Notes
	Declination Notes
	Evaluation
	Meeting Minutes
	Project Description
	Project Title
Requirements	Long Notes
	Notes
Reviews	Long Notes
	Response Notes
Volunteer Gifts	Description

The Header Area



All of the main work areas in GIFTS Alta share the same web style header that includes the following:

The GIFTS Alta Logo

The Work Area Toggle Buttons

The User Menu

Quick Find

Quick Find Options

Full Search

Saved Searches

The Query Builder

The Ribbon Menus

The GIFTS Alta Logo

The GIFTS Alta logo appears in the upper right-hand corner of the header.

Clicking on the logo does the following:

- If your are not on the Dashboard, clicking the logo will navigate back to the Dashboard area and refresh the contents.
- If the user is already on the dashboard, clicking the logo will refresh the contents.

The Work Area Toggle Buttons

The four buttons directly below the GIFTS Alta logo let you move quickly between the three main work areas and access the User's menu.

The Dashboard

The Workspace

The Reports Library

User's Menu

The User Menu

The User Menu icon is located under the GIFTS Alta logo next to the Reports button. A tool tip displays the user's name when the mouse cursor is placed over it.

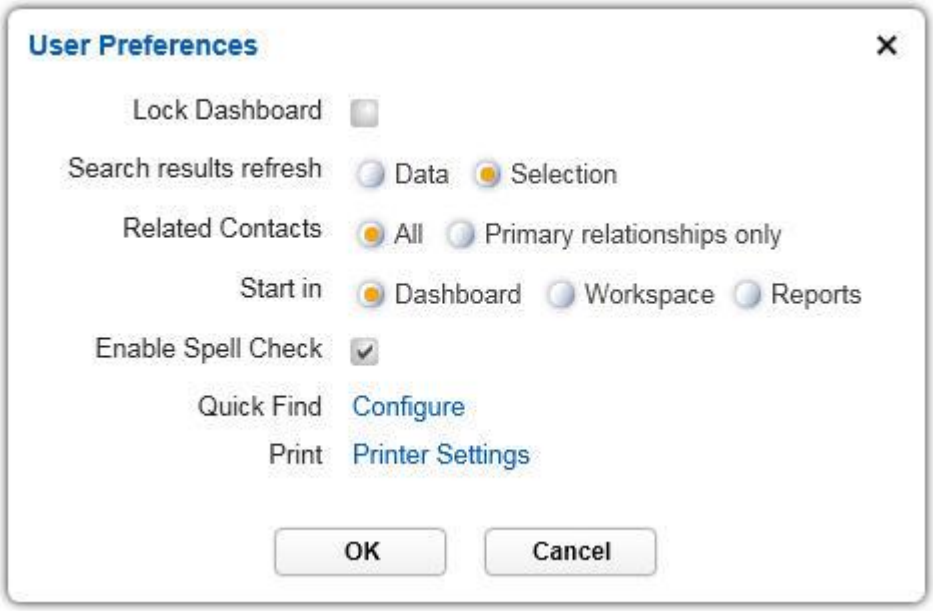
Clicking the icon displays a drop-down menu that provides access to the options listed below.

Menu Option	Sub-Menu Option	Description
Libraries	Saved Views	Opens the Saved Views Library where you can access Standard, Saved, and Flagged Public Views.
	Dashboard Parts	Opens the Dashboard Parts Library window.
Preferences		Open the User Preferences window where you can configure various settings. See User Preferences for more details.
Reminders		Opens the Reminders tool. Previously available only with GIFTS Plus Pack.
Tax		Opens the Tax Status Lookup tool. Previously

Menu Option	Sub-Menu Option	Description
Status/Lookup		available only with GIFTS Plus Pack. **NOTE:** You must have a current subscription for Tax Status Plus.
IGAM	Upload Request Status	Uploads new and modified request statuses to IGAM allowing applicants to see request statuses on their My Account page.
	Upload Payments	Uploads new and modified Payments to IGAM allowing applicants to see scheduled payments on their My Account page.
	Refresh Due Dates	
Change Password		Opens the Change Password window.
Refresh System Settings		Refreshes the code tables, permissions, and Preferences loaded into memory when Alta is launched. 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. **NOTE:** GIFTS may also be refreshed by logging out of the system, then logging back in as well.
Change User		Allows the current user to log in as a different user without having to close the application.
Help		Opens the Alta Online Help.
About Alta		Opens the About Alta window which displays version information for Alta and its installed modules.

User Preferences

The User Preferences window gives you access to the following settings:



Option	Description
Lock Dashboard	If enabled, prevents you from adding, modifying, or removing Page Parts to the Dashboard, or (in panel mode) moving them around.
Search Results Refresh	Controls the data displayed after a refresh is made either by the user performing an “action” or clicking the Refresh icon. **Selection:** The query will be re-run and the whole page will be refreshed. **Data:** The current grid will be kept and only the data displayed will be refreshed.
Related Contacts	This option determines whether the Contacts Related Record in the Workspace shows all Contacts, or only those related as Primary Contacts when Organizations or Requests are selected.
Start In	Determines which view the user sees each time they log in to Alta: • Dashboard • Workspace

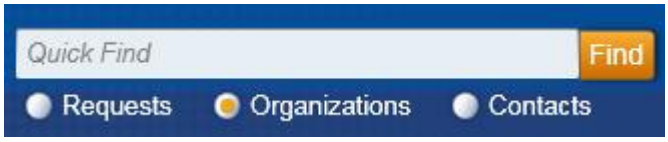
Option	Description
	• Reports The Dashboard will be the default for all new users, or existing users that don't have a setting specified.
Enable Spell Check	Enables automatic spell check (similar to Word) for various text fields in Alta.
Quick Find Configure	The Configure button will launch the Quick Find configuration popup documented in Quick Find Options.
Printer Settings	The Printer Setup button will launch the generic printer settings popup.

Quick Find

The new Quick Find field allows you to quickly locate a specific record, using a text value such as a word, phrase, or record ID.

NOTE: Quick Find is NOT intended to search for sets of records (Education grants) or to combine multiple criteria as part of the search (a Request that came in yesterday for a particular Organization).

By default the cursor is focused in the Quick Find field when you initially open most pages. If you begin typing, the text will go directly into the Quick Find field.



Located below the Quick Find field are configurable radio buttons for selecting the type of record being searched. See Quick Find Options for more details.

The last selected radio button is remembered for each user.

Simply type in some text and either click the **Find** button or press **Tab/Enter** to begin a search.

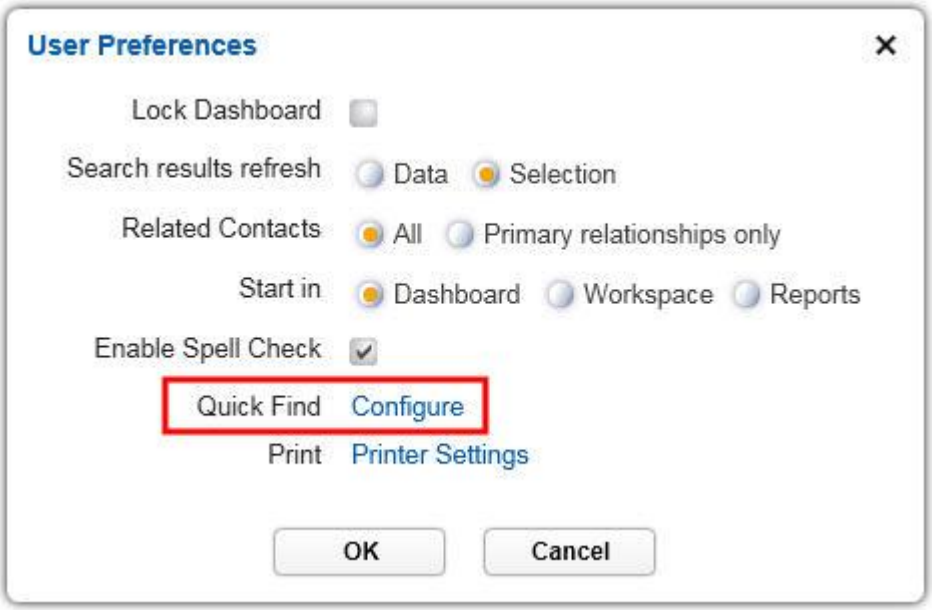
The value entered will be searched for in all fields configured for the record type selected.

Quick Find Options

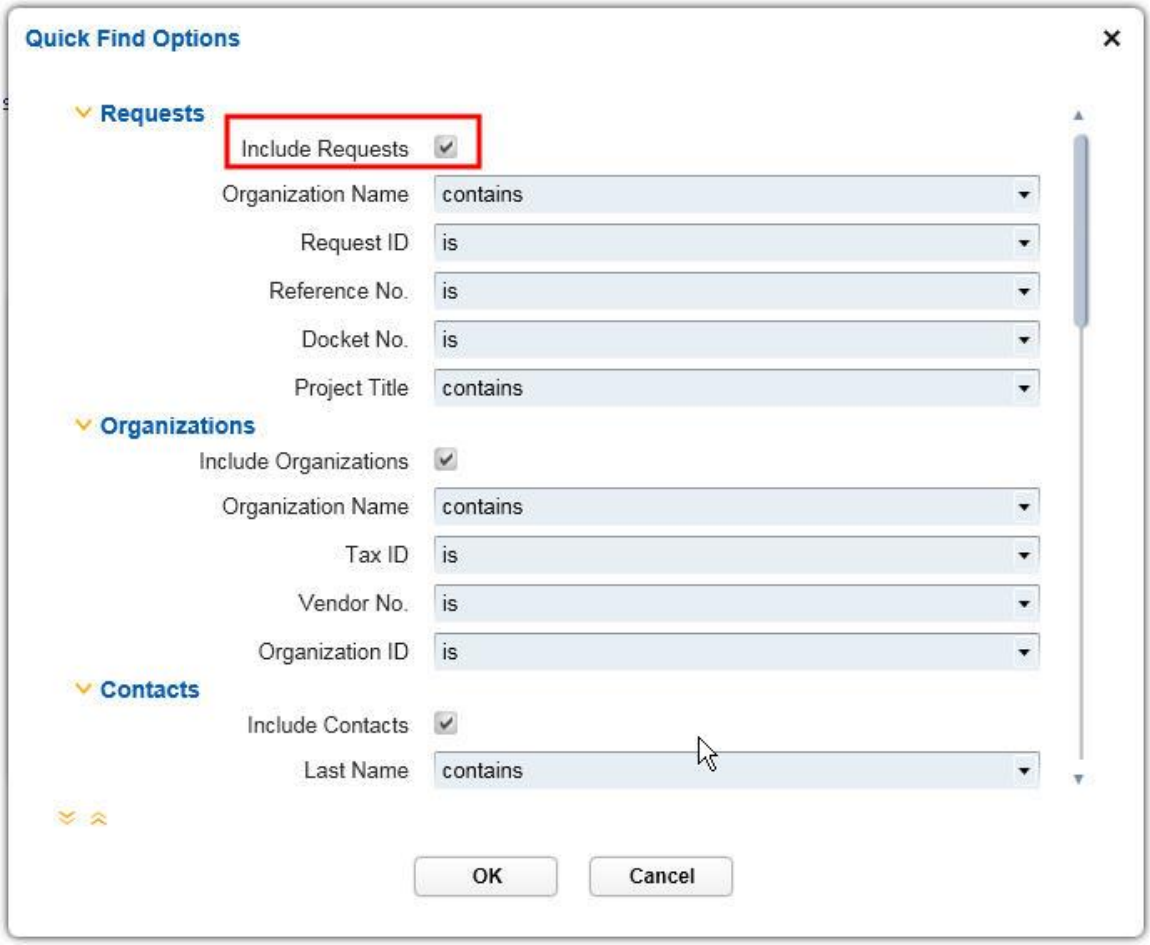
The Quick Find Configuration window allows you to control the record types radio buttons available under the Quick Find field and also the fields being searched by each.

To access the Quick Find Configuration window:

1. Open the **User Menu** and select **Preferences** to open the User Preferences window.



2. Click the **Configure** link next to Quick Find to open the Quick Find Options window.



You will notice that the default radio button options for Quick Find (Requests, Organizations, and Contacts) are checked as included.

3. Check or uncheck the Include box next to each record type to control which ones you want displayed.
4. You can also make changes to the common search fields for each record type.
5. Click OK to save your Quick Find settings and close the window.
6. On the User Preferences window, click OK to close the window.

NOTE: If you click **OK** on the Quick Find Options window but click **Cancel** on the User Preferences window, the Quick Find options will still be saved.

Expand or Collapse Sections

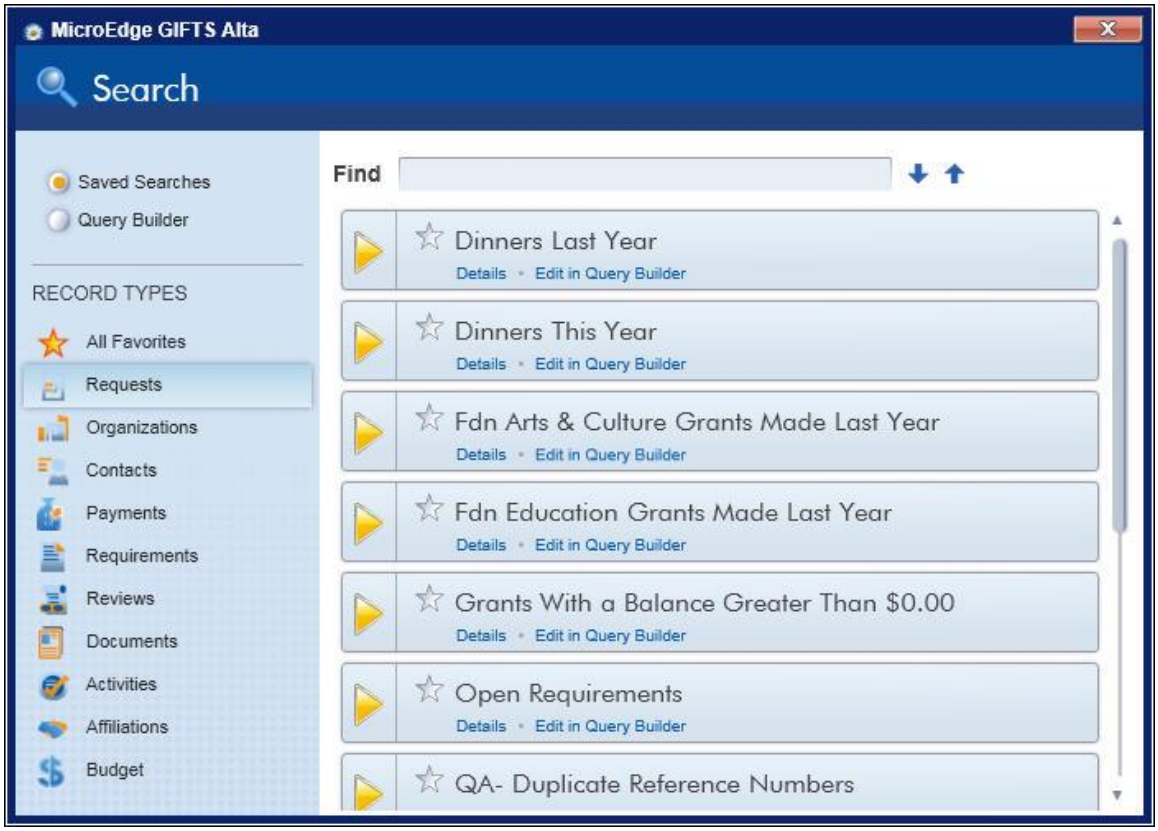
As an added convenience, there are also small orange arrows next to each record type that allow you to collapse or expand that section.

If you know you will be changing the Quick Find Options frequently and only need to work with specific record types, you can collapse the sections you don't need to make scrolling through them in the future easier.

The double orange arrows on the lower left allow you to Expand All or Collapse All sections.

Full Search

The **Full Search** link on the header of all main work areas opens the Search window.



This gives you access to the following:

- Saved Searches
  - Standard Searches
  - Personally Saved Searches
  - Saved Searches of other user that have been marked as Public
- The Query Builder

In previous versions of GIFTS, the Saved Search feature was not integrated with the search form; this version combines the two and significantly enhances the usefulness and availability of saved searches.

In the Query Builder, you determine which filters to include on the form by default for each record type.

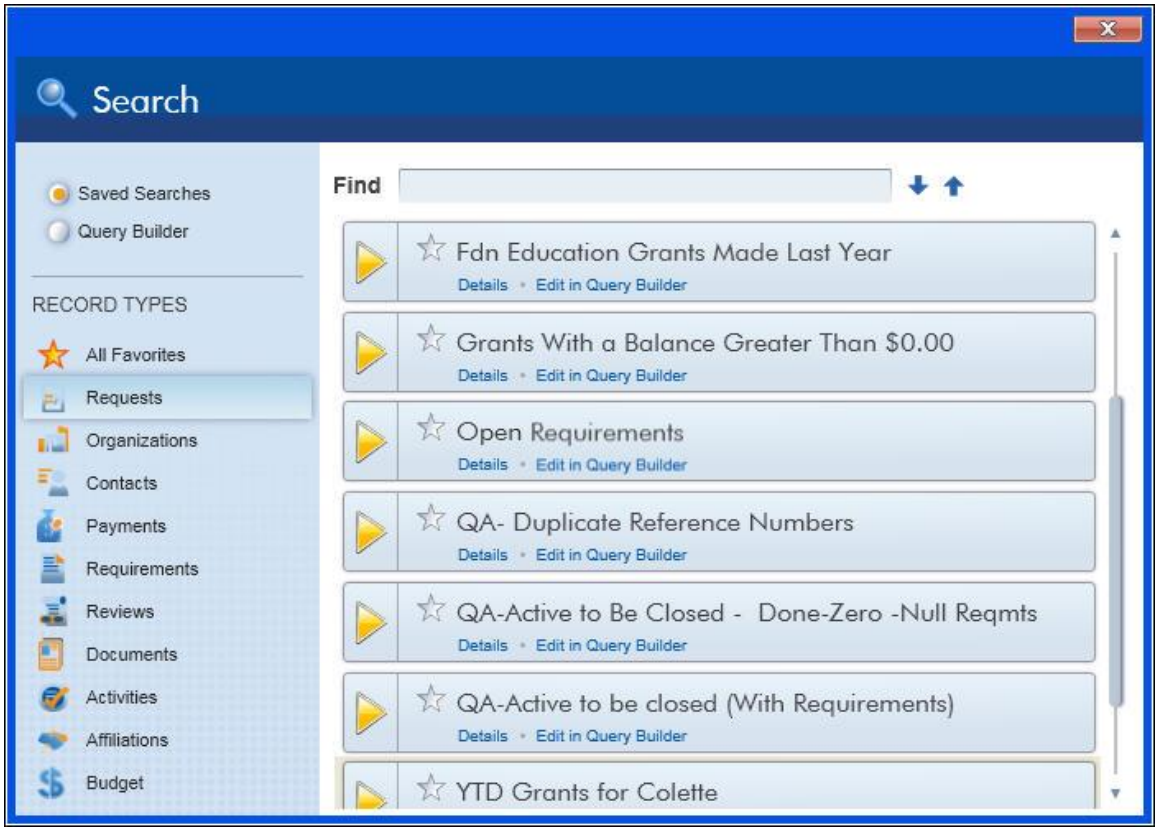
The Search form will remember the settings last used for:

Show Radio Button - Saved Search or Query Builder

Record Type - The last record type selected (including All Favorites)

Saved Searches

When Saved Search is selected, the Search form lists all of the searches for the selected record type in alphabetical order by Name.



NOTE: To build your own searches from 'scratch', click the **Query Builder** radio button.

Display

Searches are listed alphabetically by Name, with favorite searches pushed to the top of the list. The Title will wrap if necessary. A vertical scroll bar will appear if necessary.

Find

The Find field above the list of searches allows the user to find a particular search in the list by searching the Name and Description. Type the value you wish to find and either **Tab** out of the

field or clicks **Next**. The system will highlight every instance of that text, and position the cursor at the first instance found. You can click **Next** again to find the next matching value, or at any point click **Previous** to go back to a previous match. There will be no error message if no match is found.

Favorites

A star icon is used to indicate whether or not a search is one of your favorites, and as a button to toggle favorite status on or off. A yellow star indicates a favorite; a white start indicates the contrary.

- If the user toggles the favorite status from false to true, the list will be reordered immediately.
- If the user toggles the status from true to false, a message will display asking the user to confirm: *Remove this search from your favorites?* Yes or No

Running a Search

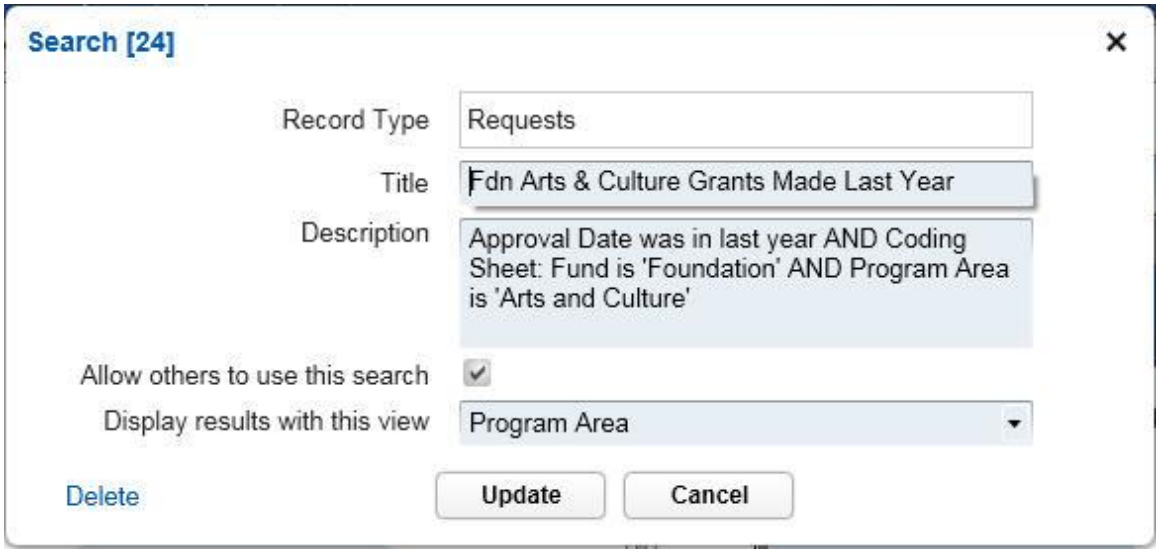
Each search is associated with a Run button(yellow arrow)to the left. Clicking the button immediately closes the search from, executes the search, and displays the result on the Workspace. If no records are returned by the search, the search still runs and displays as an empty grid with “0” as the record count on the Workspace.

Search Details/Editing Search Properties

Below the Name of each search is a Details button to display additional information about the search, and provide access to edit the Search Properties for that search.

If the search is public and the user does not have the Public Saved Searches permission, the Edit button will be hidden.

If you click the **Edit** button, the Search Properties form will display.



If you make any changes and click the **Update** button, those changes will be immediately reflected on the Search form.

Edit in Query Builder

Below the Name of each search is an **Edit in Query Builder** link. Clicking on this link will display the filter options for that saved search in the Query Builder. A label above the filters will display "Saved search:" and then the name of the search being edited.

From here, you can modify the filters and run the search at any time, just as you would any ordinary Query Builder search, but the following features are specific to the query builder when a saved search is active:

- The links at the lower left may include the following : **Clear, Update, Save as, and Advanced**.
- If you created the active saved search, or you have the Public Saved Searches (Update) permission, the **Update** Search link will display in the lower left – otherwise, it will be hidden. If you click this link the Search Properties form for the active search will display in a popup. (See Display form)
    - **Update** - the search will be updated with the information in the Query Builder and on the Search Properties form.
    - **Cancel** – the Search Properties popup will close. No changes will have been saved to the saved search
- The **Save As** link will be available in all cases. Clicking this link will bring up the Search Properties form for a new search. All values from the original search will default in, with the following exceptions:
    - The text "Copy of " will be placed at the beginning of the Name. Name value will be truncated if the resulting string exceed the 50 character limit.
    - If you do not have the Public Saved Searches (Add) permission, the Allow others to use this search flag will be set to false, and the prompt hidden on the form.

NOTE: To return to the Saved Searches list without changing the Saved Search filters, simply click the **Saved Searches** radio button.

Save As

Users often want to create a new Search based on an existing one. They can accomplish this by clicking the **Save As** link.

When clicked, the Display form will display. If the user completes the save of the Search, the Search Properties form will close and the list of saved Searches should be updated.

This action is available even if the search created by another user, and you do not have permission to update public searches. You are still allowed to make a copy of it since you are not effecting the original Search.

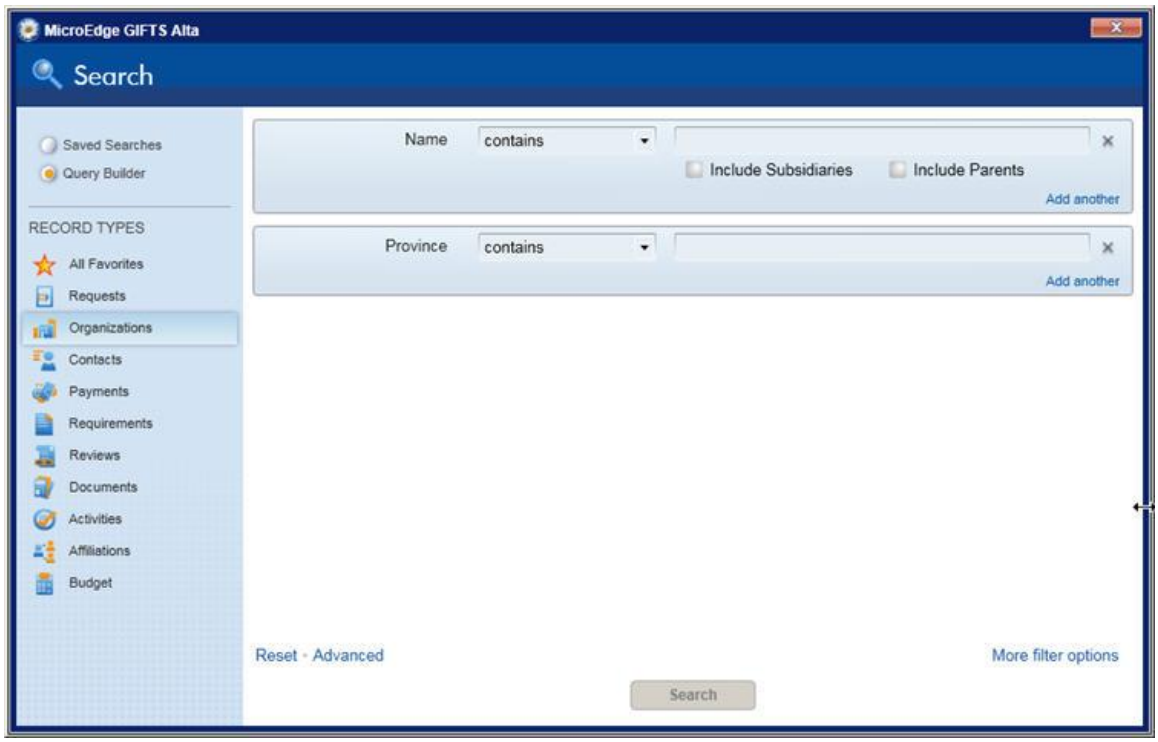
Delete

You may click the **Delete** link to delete a saved Search. The link is hidden if the Search was created by another user and you lack the proper permissions.

When clicked, a message opens asking you to confirm.

The Query Builder

The Query Builder replaces the GIFTS 6 Quick Find feature. It allows you to build complex queries using a combination of filters based on a subset of the system data entry and calculated fields.



Filters

A filter is a data entry field or calculation in the database, combined with an operator and a value or values. The label for each filter is the name of the corresponding GIFTS field.

You control which filters are included by default through the **Set as Default** link on the More Filter Options form.

The following options are available to filters placed on the Query Builder:

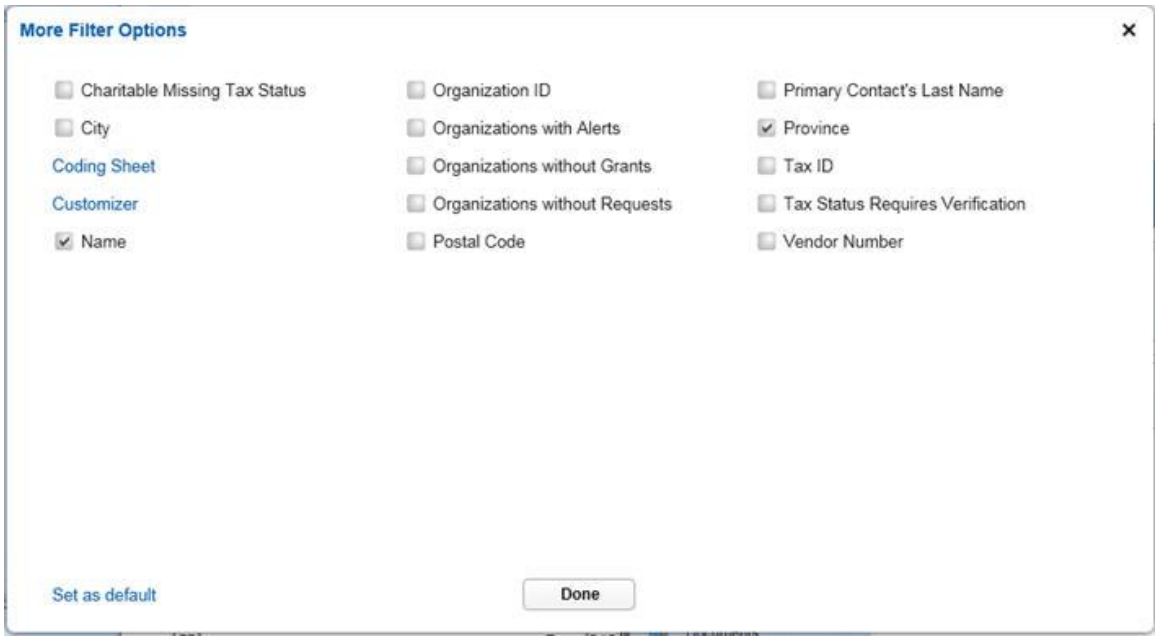
- Each filter includes an "X" button on the right that removes the filter from the list.

  IMPORTANT: Any filter for which no value has been supplied will be ignored when the query is constructed. So, the only reason to remove a filter entirely is to get it out of your way.

- Most filters allow you to select more than one value. Drop-down prompts have this feature built in. For non-drop-down prompts, the **Add another** link adds another instance of the filter, and an "or" label will display between the instances.
- The prompts associated with a record's Coding Sheet are combined into a single Coding Sheet filter. This allows the user to add separate instances of the Coding Sheet to create complex and/or searches.

More Filter Options

This link is located in the upper right corner of the Query Builder and displays a pop-up of all the filters that are available for the current record type.



Each filter is preceded by a checkbox. If that filter is already included in the query, the checkbox is checked.

To add more filters check the box next to your desired filters.

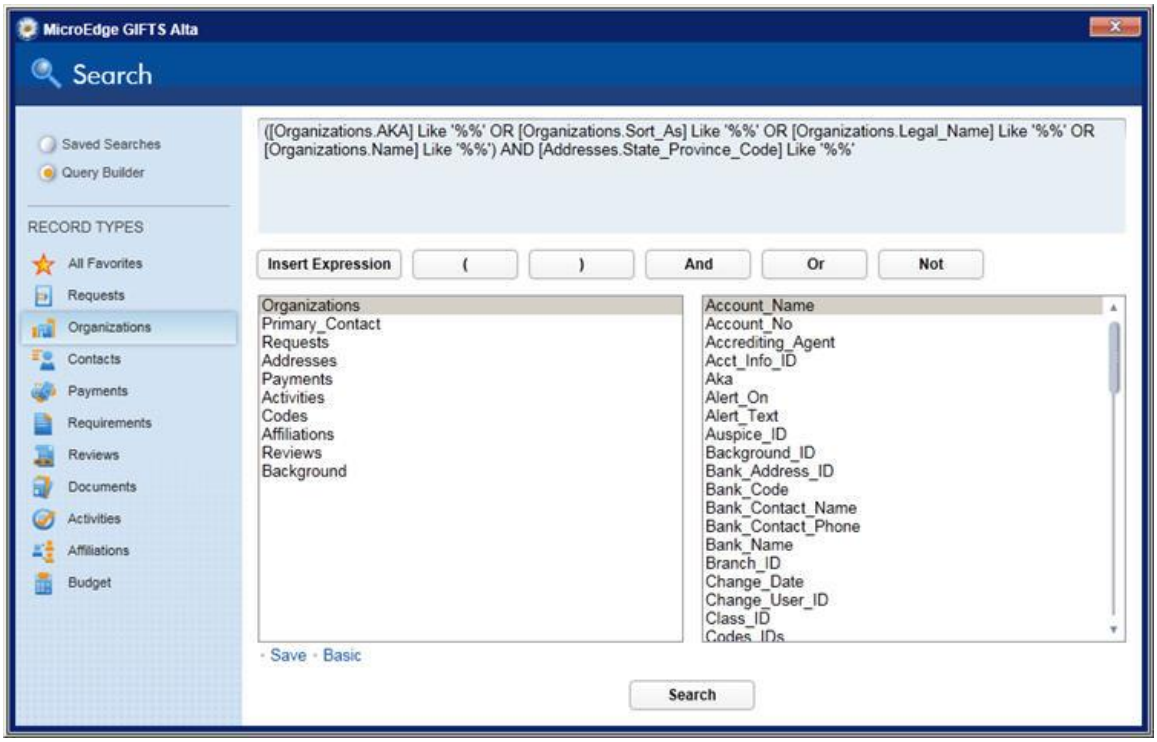
The **Set as defaults** link allows you to control which filters appear for that record type by default. When you click this link, the default filters will be set to whichever filters are currently specified. (Operators and values are not stored as defaults, only the filter itself.) Each time the user accesses the Query Builder for the current record type, these default filters will display.

Coding Sheets and Customizer Fields

Two special cases exist, Coding Sheet and Customizer, where the prompts, and consequently the filter options, are defined by the client. These options will display not as checkboxes, but as links. Clicking the link will open a popup with checkboxes listing all the Coding or Customizer filters available and offer the same functionality.

Advanced Search

The Advanced Search link is located in the lower left area of the Query Builder and allows you to type in or modify a SQL query. When you click **Advanced**, the system automatically defaults the SQL statement for the criteria currently defined on the form.



To return to the Query Builder mode, click the **Basic** link on the bottom.

Other Query Builder Links/Buttons

The following command links are available depending on the type of search you have open:

Link/Button	Description
Last Search	This replaces the filter options with both the filters and values from the last search executed for the selected record type. (No warning message.) If a saved search was active in the Query Builder, it will also be cleared.
Reset	Resets to the default filter options, including removing any operators or values. (No warning message.) If a saved search was active in the Query Builder, it will also be cleared.
Update	**Saved Search Only:** If the user is editing a saved search (the search name will be shown at the top of the panel) this button brings up the Search Properties form and

Link/Button	Description
	allows the user to overwrite the existing search with the new filters and properties.
Save	Opens the Search Properties form allowing you to saved the current set of filters as a new search.
Save As	**Saved Search Only:** Only displays if the user is editing the filters of a saved search. Allows you to save the current filter settings to a new Saved Search so you can edit the filters as needed.
Advanced	Takes you to the Advanced Search form where you can manually type in or modify the search code.
Basic	**Only in Advanced Search mode:** Returns you to the basic Query Builder form.
Search	When you click this button, the following will occur: • The search form closes. • The selected Record Type and Saved Search/Query Builder radio buttons settings are saved as defaults for the next time you access the form. • The Workspace displays with the results of the query. This is the case even if the query returns zero records.

The Ribbon Menus

The Ribbon menus are displayed at the top right of the screen, and consists of menus for New, Options, Modules, and Actions. Each ribbon menu will expand or contract with available options as you move from viewing one record type to another.

To select a ribbon menu item, make sure the proper menu tab is selected, move the mouse pointer to one of the options available, and click the left mouse button once.

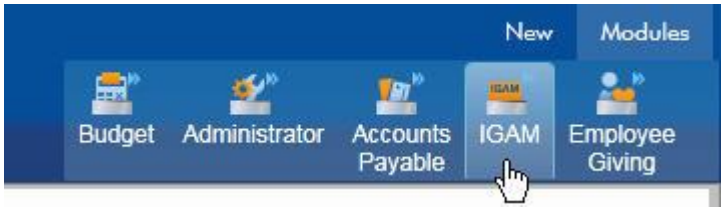
New Menu

Allows you to create new records for most of the major record types 'from scratch', meaning that you will supply the necessary relationships when you create the record (as opposed to GIFTS 6, where you were required to open a related record first.) On the Workspace, however, if you have a single record selected or open, the appropriate relationships will default in.

Options Menu

Only available on the Workspace, this menu contains options like Print, Export, Chart, Email, and Report.

Modules Menu



Includes the options to launch the additional GIFTS modules like Budget, Administrator, Accounts Payable, IGAM, and Employee Giving.

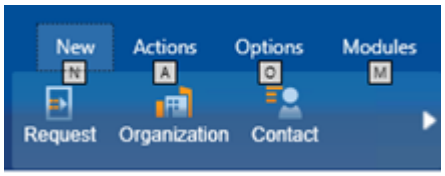
Actions Menu

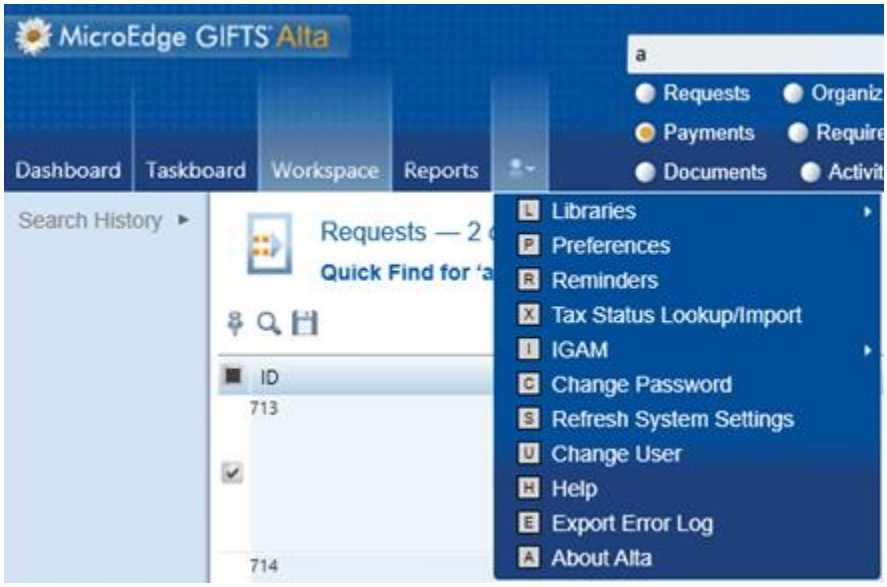
Only available in the Workspace, this menu provides the actions available for the selected record (like Approve and Decline for Requests) or the batch actions available if more than one record is selected.

If there are more actions available than space allows, a blue arrow will become available on the right side of the menu. This will slide the menu to the left revealing the additional options.

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)

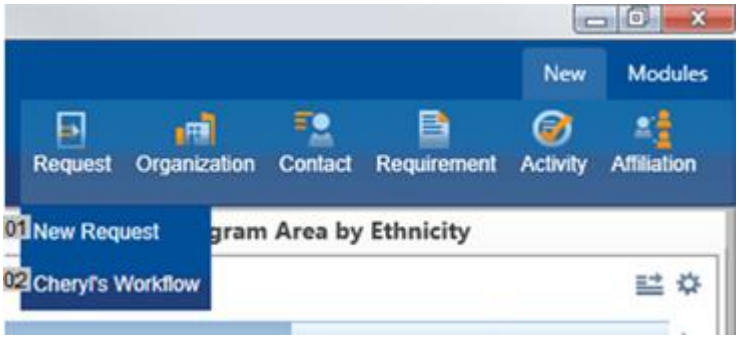
Only the record types that are enabled in Preferences will appear with its shortcut key.

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)

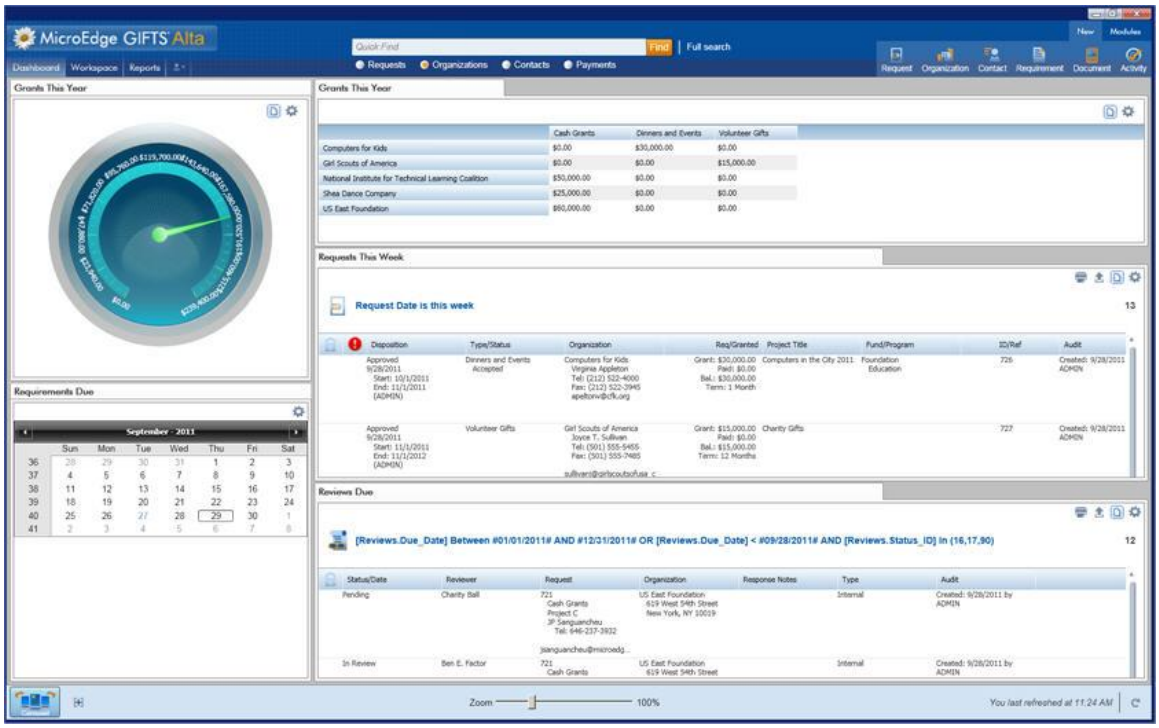
Item	Shortcut Key	Lower Level
IGAM	I	
Employee Giving	E	

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

Welcome to the Dashboard

The Alta Dashboard is the first introduction of a 'Homepage' type interface for the GIFTS product line. While the overall concept of the Dashboard is the same as a homepage, it offers a different structure with much more functionality.

The Dashboard serves as the one location in GIFTS Alta where Executives and Program Staff can view information quickly and easily, and Grant Managers can organize critical information to be presented in one place. The information you could once only get from running multiple reports can now be accessed and displayed on a single page.



NOTE: When you initially open the Dashboard, it will be blank with no panels assigned to it.

Please refer to the following topics for more details on managing the Dashboard:

[The Dashboard Footer]

[Dashboard Views]

[About Dashboard Parts]

[Adding Dashboard Parts]

[Modifying or Deleting Dashboard Parts]

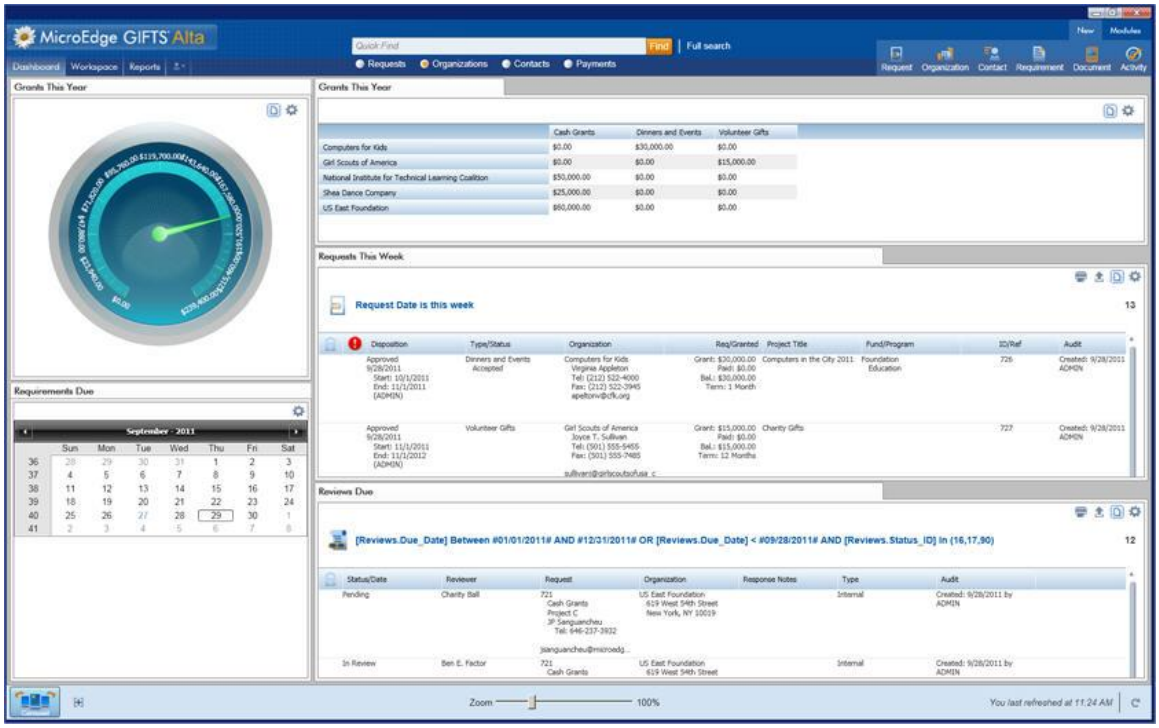
[The Dashboard Parts Library]

Dashboard Views

The Dashboard has two available views which can be toggled back and forth: Dashboard Views or Dashboard Views.

Panel View

The Panel view is the default for the GIFTS Alta Dashboard. In this view, information is presented in individual panels which can be placed on the page in various locations allowing you to see several panels at once.



This view is aimed at:

- Users who wish to have different types of content at their fingertips (grants manager, more advanced program officers, etc.)
- Light users whose Dashboard will consist of only a few panels (Board Members, etc.)

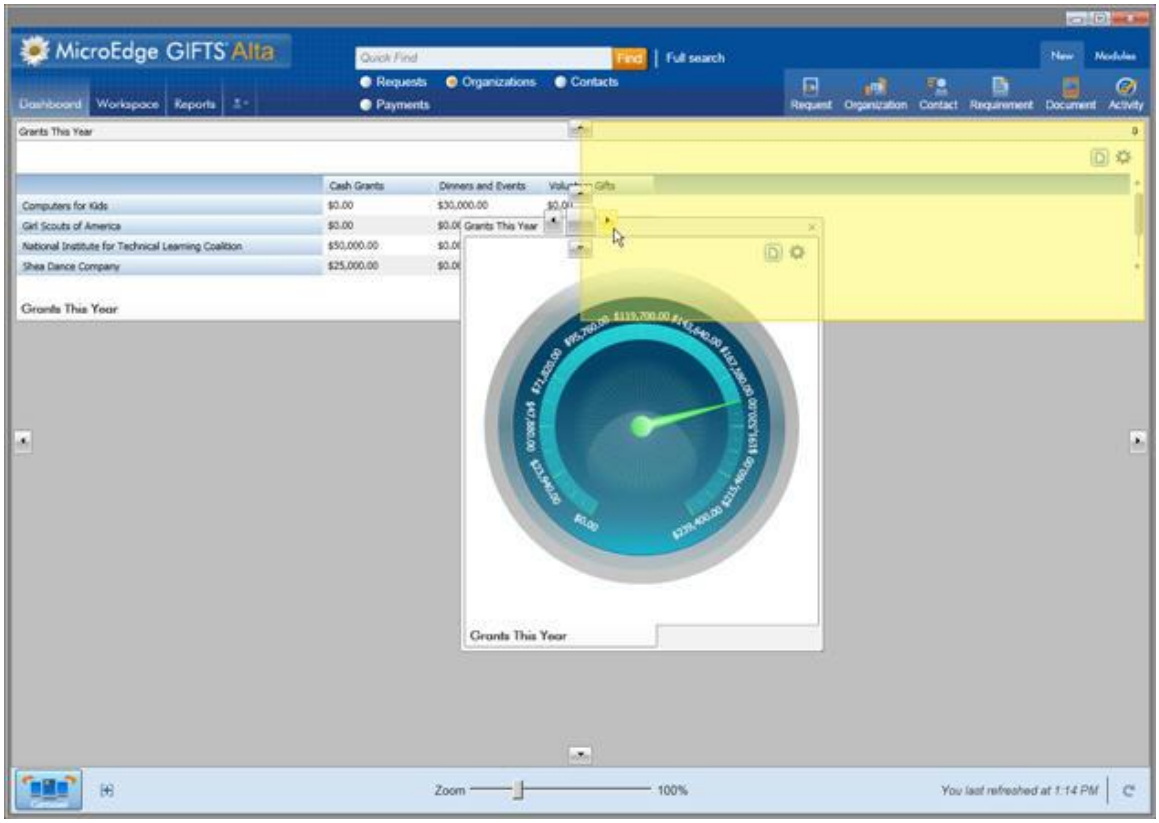
Docked vs. Floating

The panels (also known as Dashboard Parts) can be Docked or Floating.

- **Docked** means you can drag a panel from one area to another and drop it into a particular section of the screen where it clicks into place like a puzzle piece. The size of the panel is determined automatically by the available space, which may be shared with other panels. You do have the option after docking to resize the panels, if desired.
- **Floating** means the panel is not locked into a position, but 'floats' over the other content and can be moved and resized at will. moving your mouse cursor around the edges of a

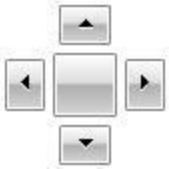
floating panel will change it to a resize tool. The resize tool will either point up/down, left/right, or diagonally depending on which panel edge the mouse cursor is on.

The example below shows one panel docked on top and one floating panel about to be docked in the upper right section. Notice when you drag a panel to a anchor point, the related section becomes highlighted to let you know where the panel will be placed.



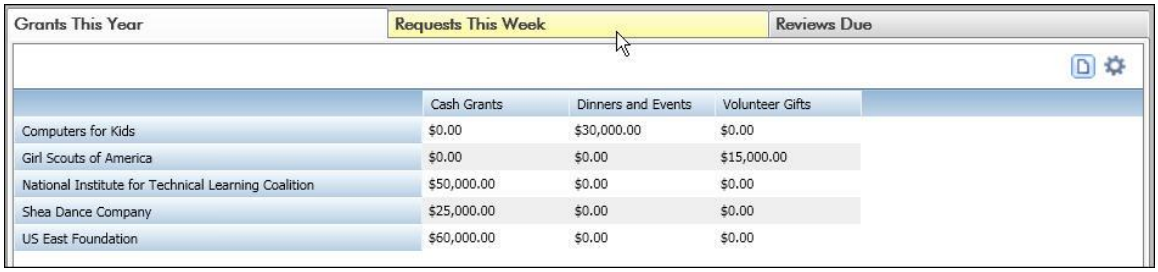
Anchor Points

As you drag floating panels into certain sections of the Dashboard, anchor points will become visible. Dragging the panel until your mouse pointer is over one of these anchors will highlight the section of the Dashboard where the panel will be docked if you drop the panel there.



Layered Panels

If more than one panel is anchored to the same section of the Dashboard they will become layered and tabs will be displayed allowing you to switch between the different panels.



	Cash Grants	Dinners and Events	Volunteer Gifts
Computers for Kids	$0.00	$30,000.00	$0.00
Girl Scouts of America	$0.00	$0.00	$15,000.00
National Institute for Technical Learning Coalition	$50,000.00	$0.00	$0.00
Shea Dance Company	$25,000.00	$0.00	$0.00
US East Foundation	$60,000.00	$0.00	$0.00

Locking the Dashboard

The Panel View layout is remembered between sessions, per user.

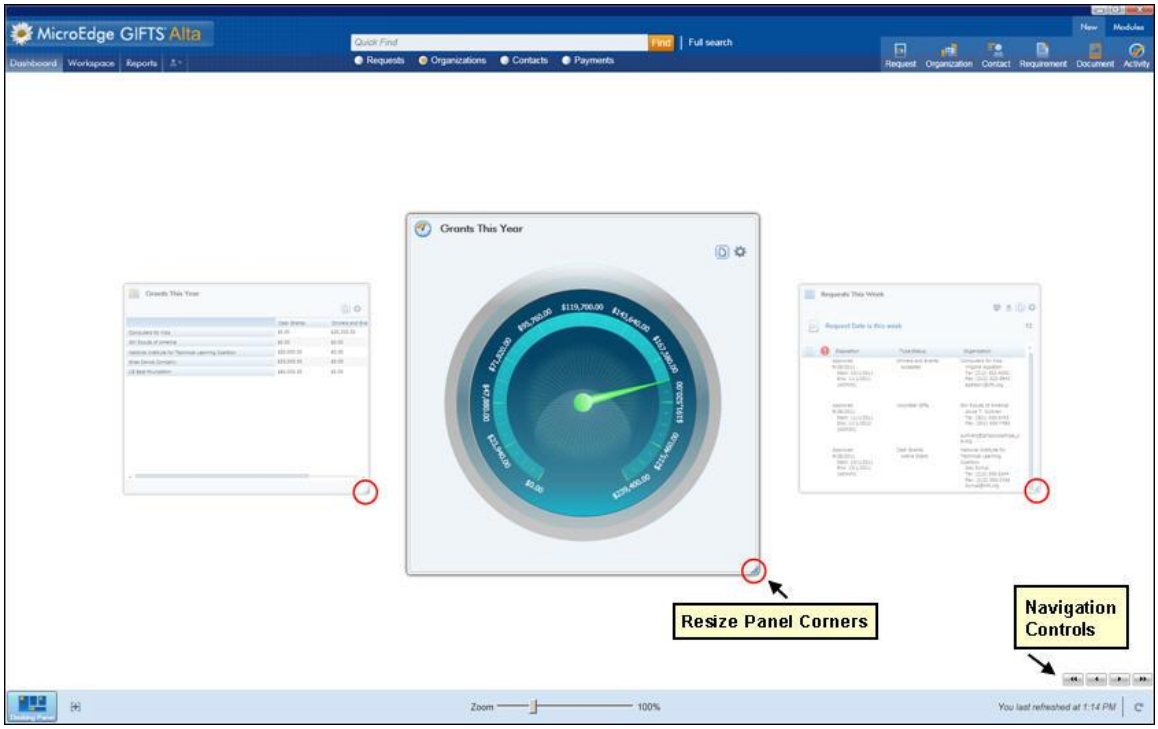
A User Preferences setting will allow the panel layout to be "locked." This is not meant to be a security measure, but only to prevent you from moving the page parts around unintentionally.

NOTE: If a grants manager is setting up a Dashboard for a user like a Board Member, they can also set the user preference to lock the Dashboard.

NOTE: If the Dashboard is locked in User Preferences, the options to Add, Configure, and Delete Dashboard parts will not be available.

Carousel View

In carousel view, the panels are placed on a large, scrolling carousel. One panel at a time will be "front and center", occupying the middle of the Dashboard at an enlarged size. The panels immediately to the left and right of the center panel will be slightly smaller, but still readable.



The carousel option is intended for:

- The medium to light user whose Dashboard will include too much content to display attractively in panel mode.
- The light user who might feel overwhelmed by seeing too much content at once in the panel view.

Moving the Carousel

To move panels left and right, you have three options:

1. Use the mouse wheel to scroll. (Up = Left & Down = Right)
2. Use the following keys on your keyboard.

   Up Arrow= Left & **Down Arrow**= Right

   Left or **Right Arrow**

   Page Up = jumps to first panel on left or last panel viewed depending on current location

   Page Down = jumps to last panel on right or last panel viewed depending on current location

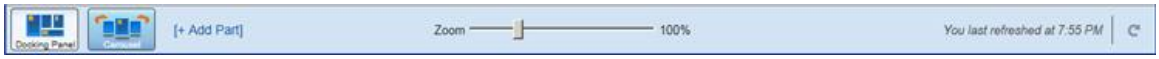
   Home = jump to first panel

   End = Jump to last panel

3. Use the navigation control buttons in the lower right area of the Dashboard.

The Dashboard Footer

The footer will be located below the Dashboard.



The footer will include the following options:

Views – picture buttons to toggle between Panel and Carousel view.

Zoom – a slider to allow the user to change the relative size of the Dashboard, like those standard on many recent Microsoft releases:

The range of the zoom will be down to 50% (smaller than that won't be useful to anyone) and up to 250%. If the zoom is set to any value besides 100%, a link will appear to the right, "(100%)" Clicking on this link resets the zoom to 100%.

[+ Add part] –add a new part to the dashboard, either from the Library, or ad hoc

Refresh date and time – shows the date and time the Dashboard was last refreshed (manually or automatically).

Refresh button – manually refreshes the content of the Dashboard.

About Dashboard Parts

A Dashboard Part is simply a panel containing some form of content.

Dashboard Parts can be added, modified, or removed as desired from the Dashboard no matter which Dashboard View you are in.

NOTE: If the Dashboard is locked in User Preferences, the options to Add, Configure, and Delete parts will not be available.

Working with Dashboard Parts

See the following for more details on working with Dashboard Parts.

Dashboard Part Types

Dashboard Part Toolbar

Standard Dashboard Configuration Options

Adding Dashboard Parts

Creating a New Dashboard Part

Modifying or Deleting Dashboard Parts

The Dashboard Parts Library

Dashboard Part Types

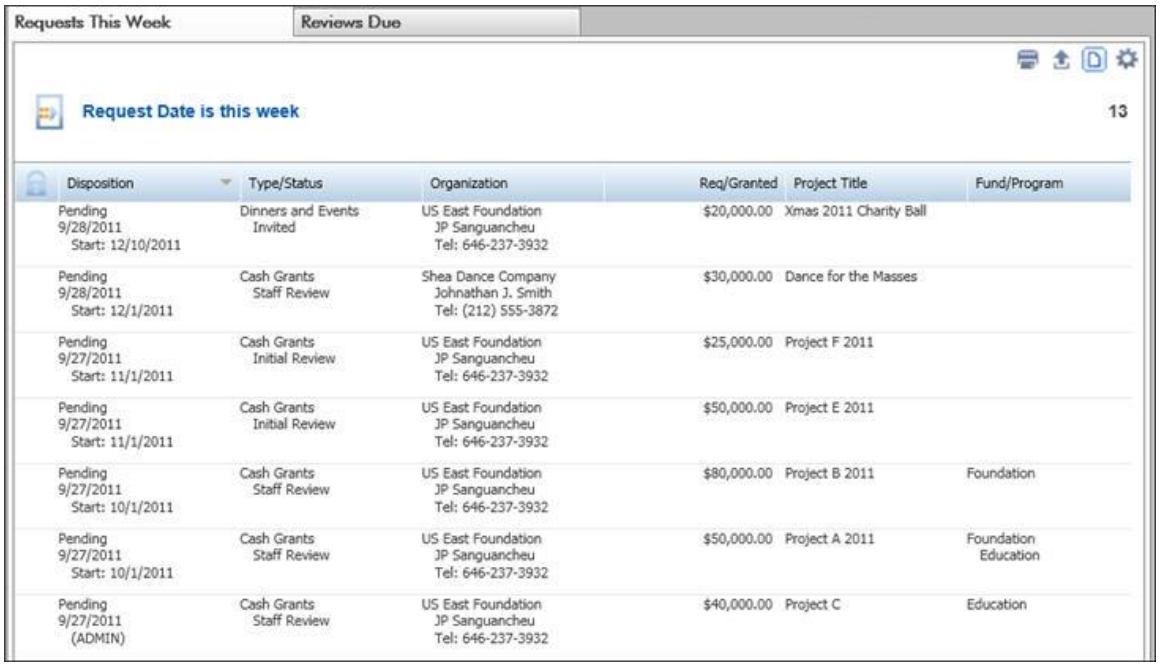
There are six general types of dashboard parts and each has their own Dashboard Parts icon:

Library Icon	Type	Description
	Table	Displays search results in a grid format. Can be assigned a saved View.
	Summary	Displays search results in a grid format with a defined Totals row. Allows for customized header, footer, columns, rows, and drill-down views.
	Chart	Displays search results in various Bar, Pie, Line, and 3D formats. Allows for defined groupings and drill-down views.
	Gauge	Displays search results in a Radial or Linear Gauge format. Allows for setting a Goal amount and Value gauged (Count, Sum, Average, Min, Max).
	Calendar	Displays search results in a calendar format highlighting dates where various activities may be due.
	Web Clipping	Displays the contents of a specified web page in a dashboard part.

To find out more about each type of Dashboard part, click on the links in the table.

The Table Dashboard Part

A table is simply list of individual records in a grid format. The display will be very similar to a Search results page.



Requests This Week | Reviews Due

Request Date is this week 13

Disposition	Type/Status	Organization	Req/Granted	Project Title	Fund/Program
Pending 9/28/2011 Start: 12/10/2011	Dinners and Events Invited	US East Foundation JP Sanguancheu Tel: 646-237-3932	$20,000.00	Xmas 2011 Charity Ball	
Pending 9/28/2011 Start: 12/1/2011	Cash Grants Staff Review	Shea Dance Company Johnathan J. Smith Tel: (212) 555-3872	$30,000.00	Dance for the Masses	
Pending 9/27/2011 Start: 11/1/2011	Cash Grants Initial Review	US East Foundation JP Sanguancheu Tel: 646-237-3932	$25,000.00	Project F 2011	
Pending 9/27/2011 Start: 11/1/2011	Cash Grants Initial Review	US East Foundation JP Sanguancheu Tel: 646-237-3932	$50,000.00	Project E 2011	
Pending 9/27/2011 Start: 10/1/2011	Cash Grants Staff Review	US East Foundation JP Sanguancheu Tel: 646-237-3932	$80,000.00	Project B 2011	Foundation
Pending 9/27/2011 Start: 10/1/2011	Cash Grants Staff Review	US East Foundation JP Sanguancheu Tel: 646-237-3932	$50,000.00	Project A 2011	Foundation Education
Pending 9/27/2011 (ADMIN)	Cash Grants Staff Review	US East Foundation JP Sanguancheu Tel: 646-237-3932	$40,000.00	Project C	Education

Display Options/Features:

- Double-clicking on any record opens it in its appropriate edit form.
- Clicking on a column header changes the sort to sort by that value. Clicking again on the header switches the sort order between ascending and descending.

  Note: These settings are not remembered between sessions.

- Users can re-order the columns by dragging and dropping.

  Note: These changes will not be 'remembered'. The columns will return to their original setting when the page is refreshed.

- Row height can be changed by clicking on the grid line below a record and dragging it up or down. This setting will be remembered between sessions.

  Note: This change effects all rows.

- Record count – the number of records returned by the Filter is displayed above the upper right-hand corner of the grid.

Dashboard Part Toolbar Options:

Table panels will have the following options available on the toolbar:

Print - Opens the standard print window.

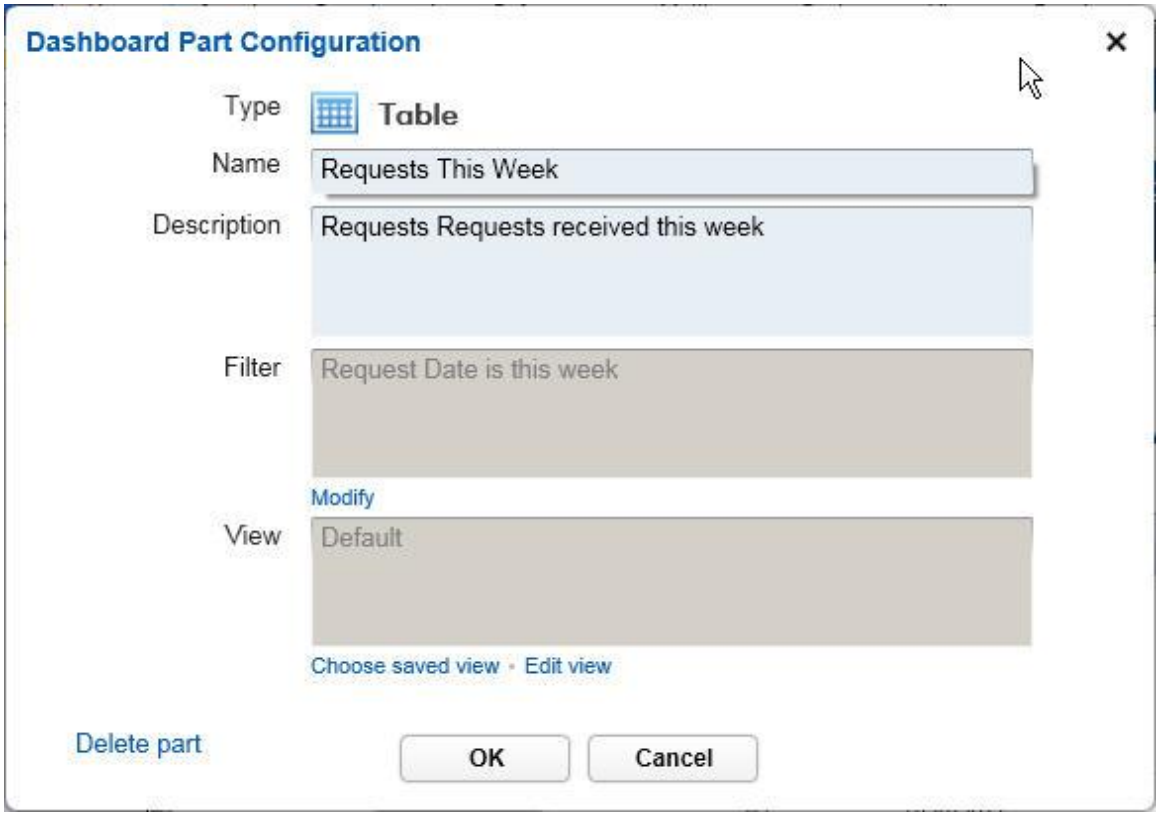
Export - Opens the standard Export window.

Workspace - displays the content on the Workspace, using the same selection, columns, and sort as the Dashboard part.

Configure and Delete - Opens the Table Configuration form as shown below. When done, click the **OK** button.

Table Configuration Options:

The Table Dashboard Part has the following options:



- Name
- Description
- Filter
- View
- Delete part

For descriptions of the standard options, please refer to the Standard Dashboard Configuration Options section.

The Summary Dashboard Part

The Summary part is also a grid, but in this grid only summary totals are available.

Grants This Year

	Cash Grants	Dinners and Events	Volunteer Gifts
Computers for Kids	$0.00	$30,000.00	$0.00
Girl Scouts of America	$0.00	$0.00	$15,000.00
National Institute for Technical Learning Coalition	$50,000.00	$0.00	$0.00
Shea Dance Company	$25,000.00	$0.00	$0.00
US East Foundation	$60,000.00	$0.00	$0.00

Display Options:

- **Drill-down**– double-clicking a single cell opens up a Table grid of the individual records summarized by that cell. The Table will open in the same panel, below the Summary.

  Note: The View used to display the records is one of the part configuration options described below. If no Drill-Down View has been specified, the records will display using the default View for that record type.

- **Open a record** –double-clicking on any record in the drill-down to open the edit form for that record.

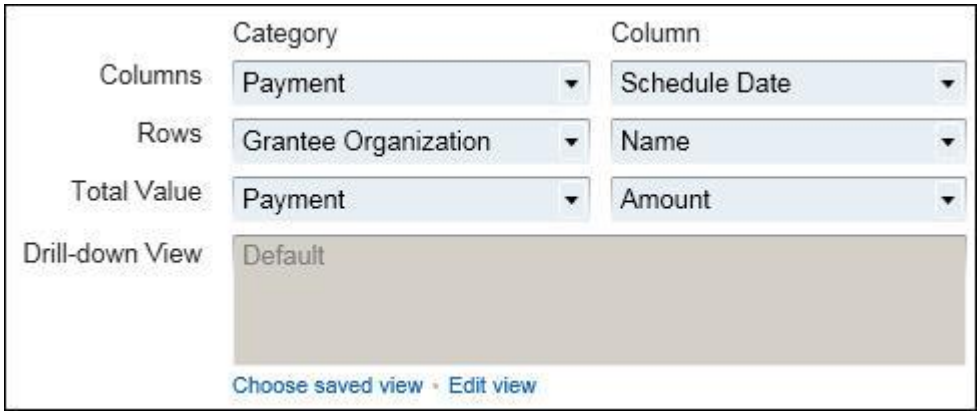
Configuration Options:

The Summary Dashboard Part has the following configuration options:

- Name
- Description
- Header
- Footer
- Filter
- **Columns**
- **Rows**
- **Total Value**
- **Drill-down View**
- Delete part

For descriptions of the standard options, please refer to the Standard Dashboard Configuration Options section.

The highlighted options unique to the Summary part will be discussed below.



Columns

The value chosen here will determine the column headers across the top of the grid.

For instance, if the user chooses “Program Area 1”, each distinct Program Area will be represented as a column in the grid.

Note that columns will not display in the grid if the filter returns no data for that column.

So, if the Columns prompt is set to “Program Area 1”, the Filter is for Grants this Month, and there have been no grants made this month in “Arts”, then no column for “Arts” will display.

NOTE: These prompts will be disabled if no Filter information is provided.

Rows

The value chosen here will determine the rows listed down the side.

For instance, if the user chooses “Grant Fiscal Year”, each Year will appear as a single row.

Rows will not display if none of the records returned by the filter fall into the group.

NOTE: These prompts will be disabled if no Filter information is provided.

Total Value

The value to summarize. For instance, if the user chooses Grant Amount, then the cell in the grid will represent the total Grant Amount for the Program Area 1 represented by that column, in the Grant Fiscal Year represented by that row. Only currency and numeric fields will be available, with the same display options that are available through Views.

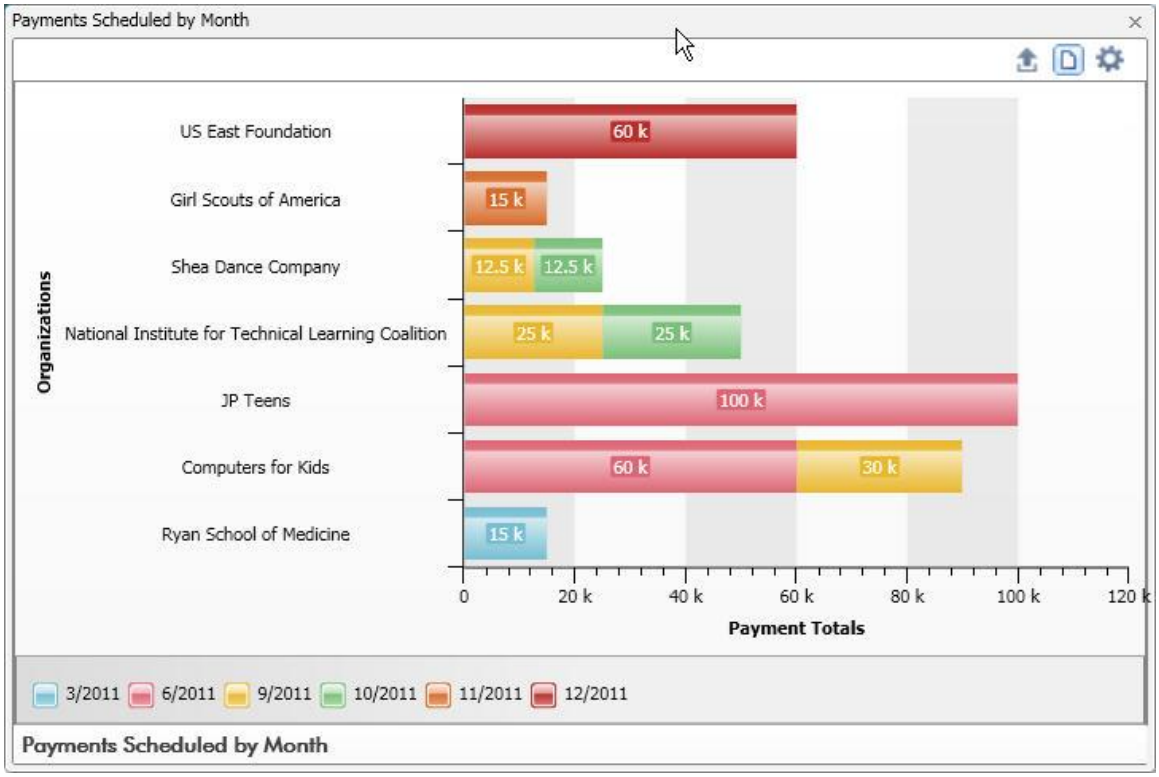
NOTE: These prompts will be disabled if no Filter information is provided.

Drill-down View

This will determine the columns and sort order (but not the Filter criteria) of the table that displays when the user double-clicks on a single cell, displaying the records that make up the total for that cell. The same interface described in Table will be available for selecting or creating a view.

The Chart Dashboard Part

Charts provide a graphic view of summary information.



Display Options/Features:

Drill-down – clicking on a segment navigates to the Workspace, displaying the results as Search Results just as if the user had performed the search manually, except that the criteria will be preceded by the label "Chart segment:"

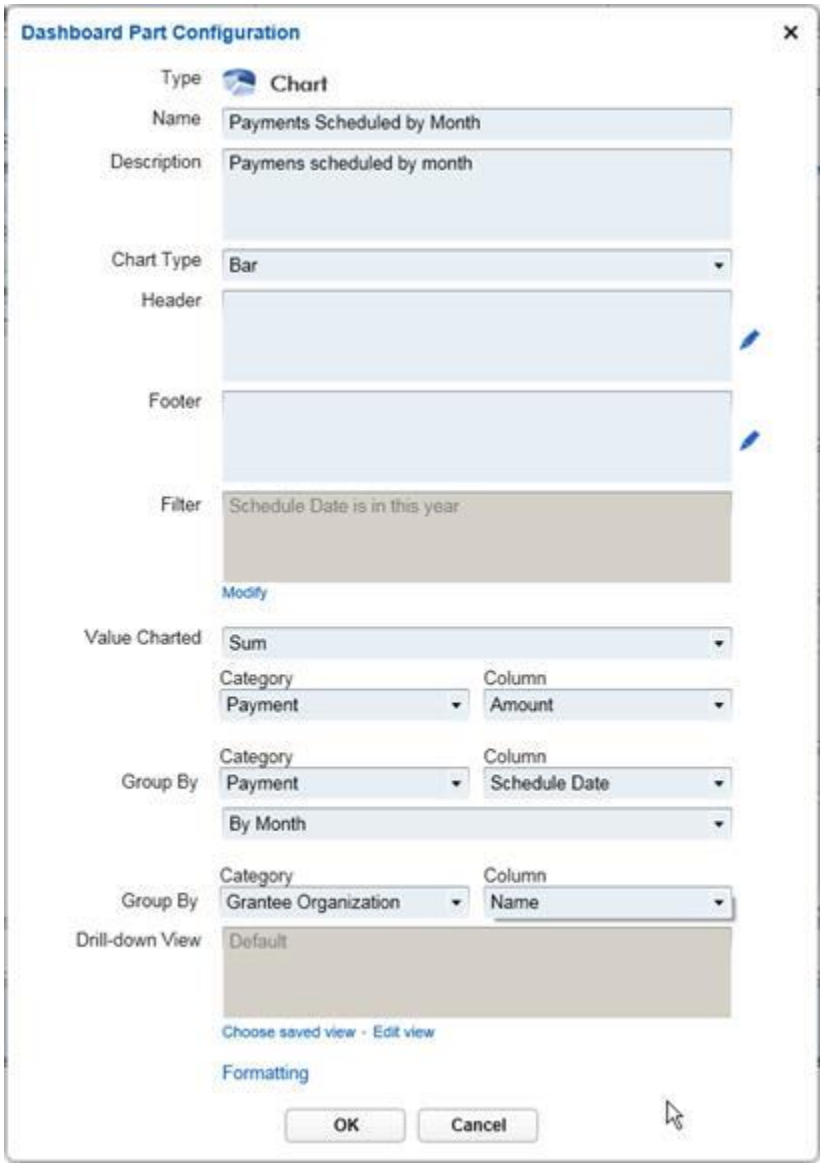
Open a record – double-clicking on any record in the drill-down to open the edit form for that record.

Dashboard Part Toolbar Options:

- Print
- Export
- Workspace
- Configure or Delete

NOTE: When printing a chart, the selected chart will automatically be scaled to fit the page.

Configuration Options:



NOTE: For descriptions of the standard options, please refer to the Standard Dashboard Configuration Options section.

Standard Configuration Options – Name, Description, Header Footer, and Filters

Chart type

The following chart types are available: Bar, Stacked Bar, Horizontal Bar, Horizontal Stacked Bar, Line, Step Line, Spline, Area, Pie, Donut, 3D Bar, 3D Stacked Bar, 3D Line, 3DArea, 3D Pie, 3D Donut.

Value charted

The calculation to be done when plotting the records on the chart. Options include Count, Sum, Average, Min and Max. Category/Column are the same options as described for “Total value” for Summary page parts. Only the numeric and currency values that can be summarized are available

NOTE: These prompts will be disabled if no Filter information has been supplied.

Group by

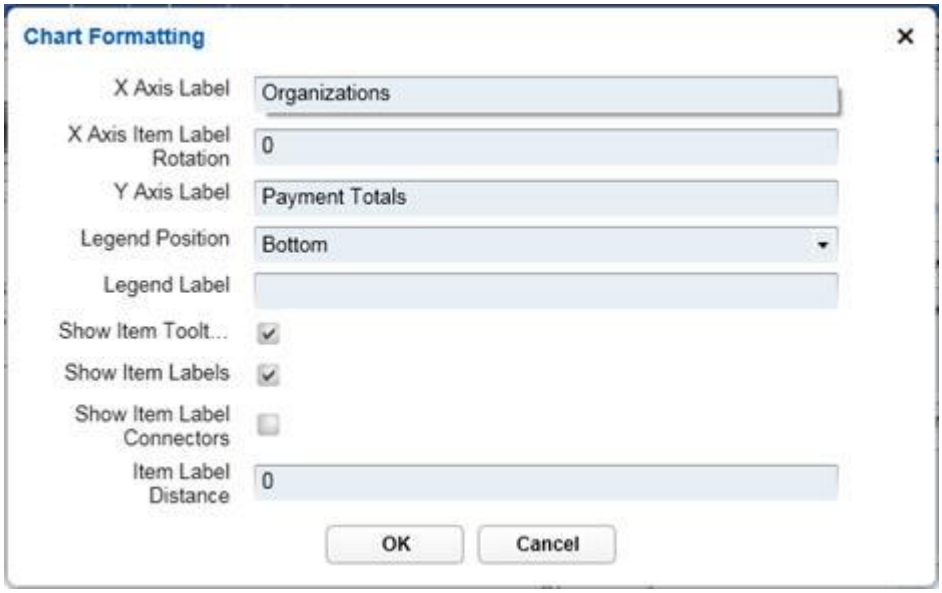
The same options as described for "Columns" in the Summary page part. If the chart is one of the bar-type charts, a secondary Group by set of prompts will also display. This provides the user with the ability to group at a sub-level as well.

NOTE: These prompts will be disabled if no Filter information has been supplied.

Drill-down View

This will determine the columns and sort order (but not the Filter criteria) of the table that displays when the user double-clicks on a single cell, displaying the records that make up the total for that cell. The same interface described in Table will be available for selecting or creating a view.

Formatting

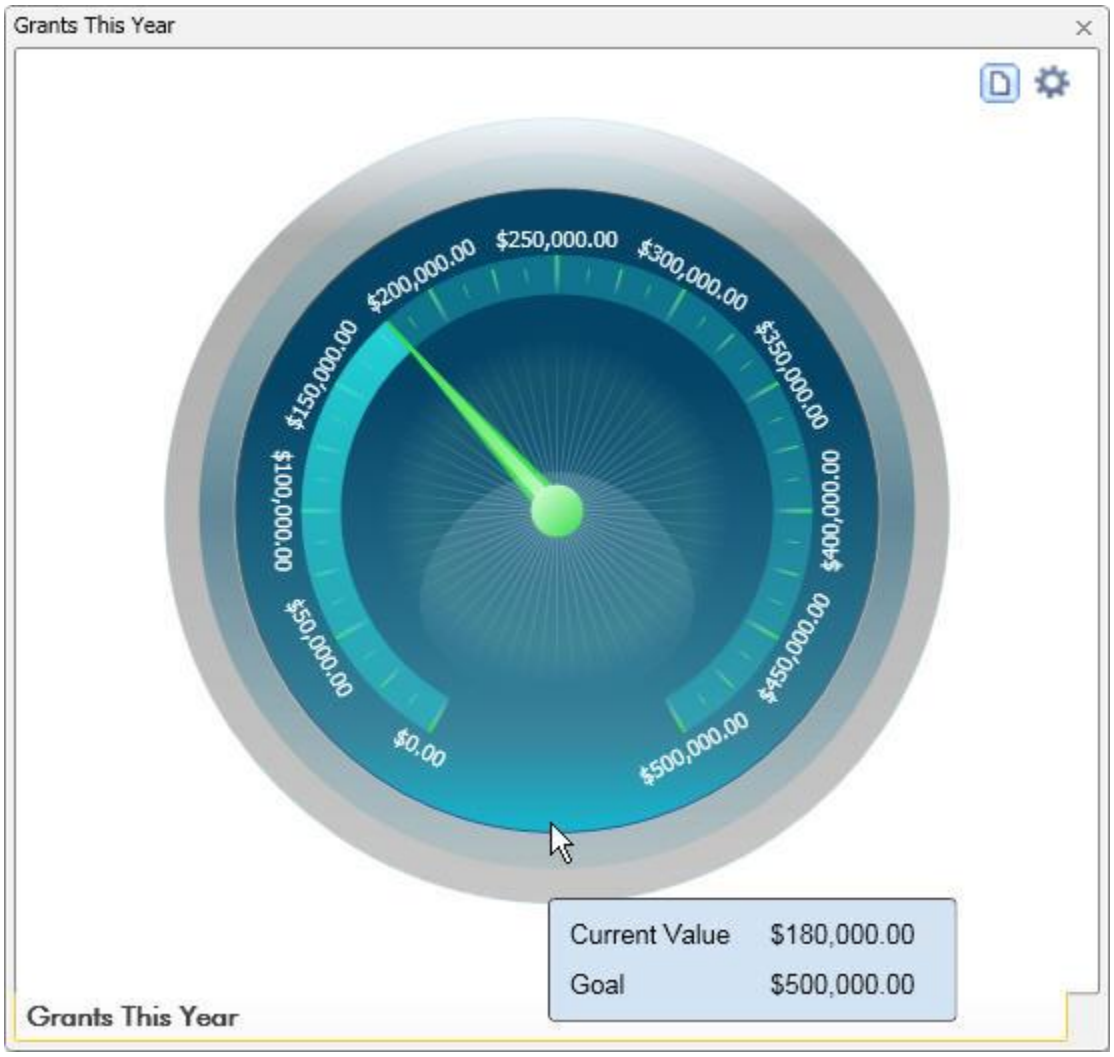


This link opens a separate popup with additional chart formatting options.

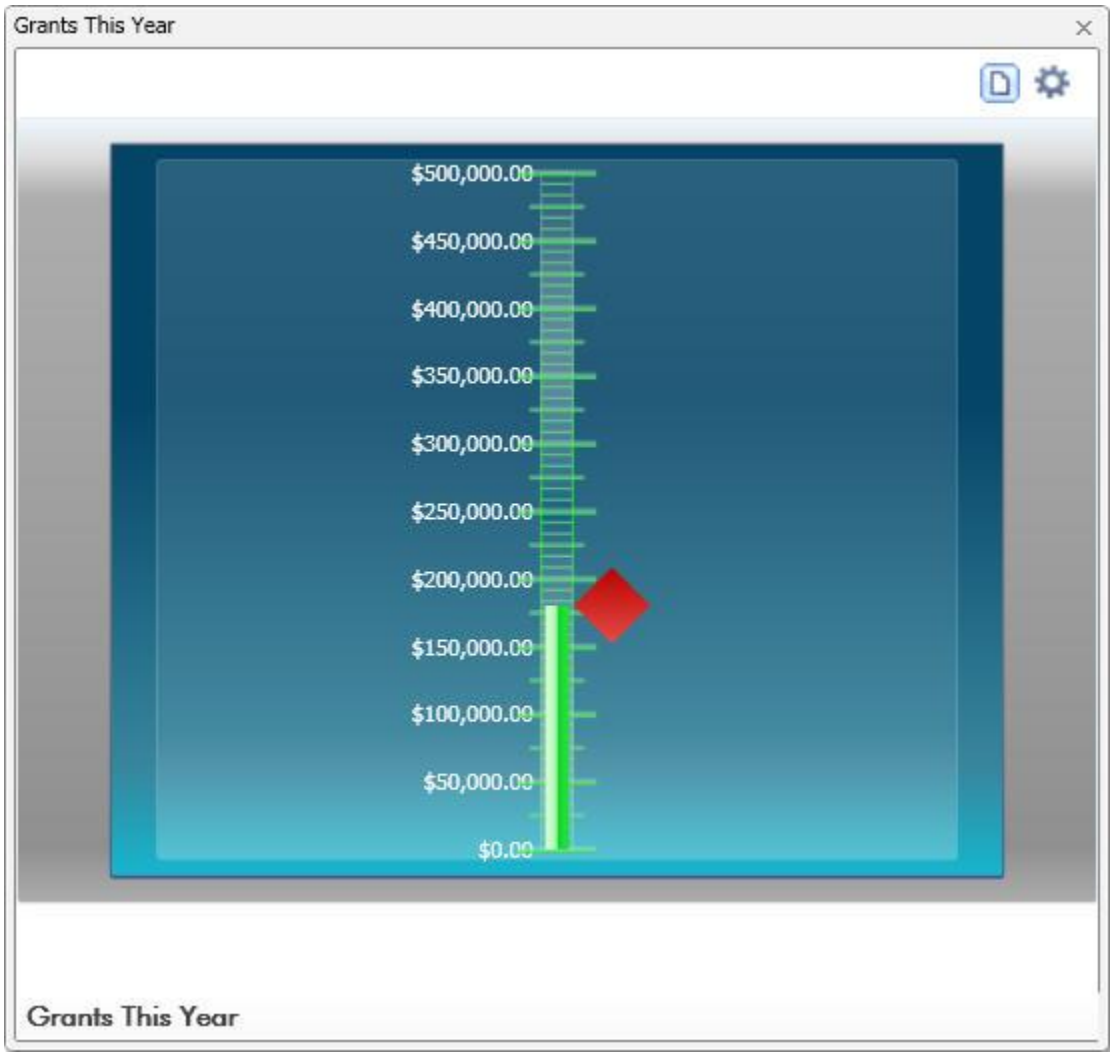
- **X Axis Label** – the label across the bottom of the chart
- **X Axis Item Label Rotation** – An angle to tilt the labels that appear with the values going across the chart
- **Y Axis Label** – a label across the side of the chart
- **Legend Position** – top, bottom, left and right
- **Legend Label** – a label that appears above the legend bar
- **Show Item Tooltips** – with this enabled, hovering over an item on the chart shows the values in a tooltip
- **Show Item Labels** – shows labels for the items on the chart. In the screen shot below, these are the numbers that appear above the bars
- **Show Item Label Connectors**- draws a line from the item label to the item
- **Item Label Distance** – the distance between the item label and the chart segment it represents.

The Gauge Dashboard Part

The gauge part is intended to allow the user to compare a total of data in their database (such as the Grant Amount for the current year) against an arbitrary number that is “plugged in” to the part, and not captured in the database. This allows clients to compare actual numbers against a goal (often referred to by clients as a “budget”).



Radial Gauge View



Linear Gauge View

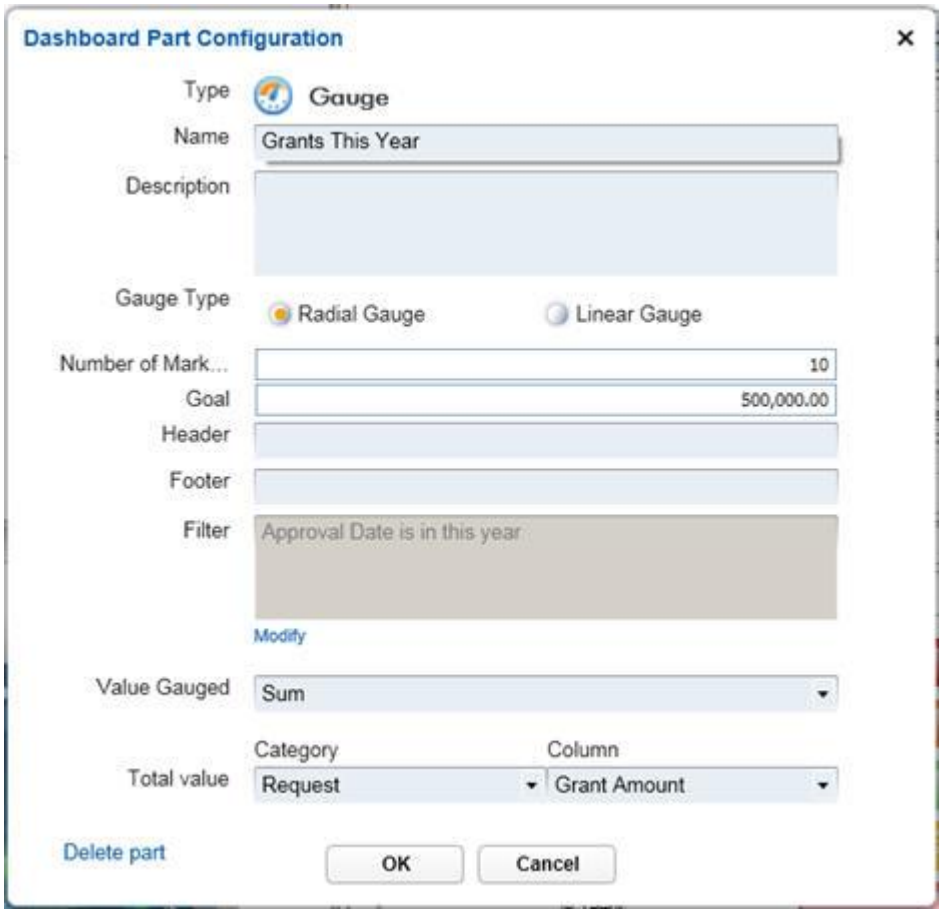
Display Options/Features:

Moving the mouse pointer over the gauge displays the Current Value and the set Goal.

Dashboard Toolbar Options:

- Workspace
- Configure or Delete

Configuration options:



NOTE: For descriptions of the standard options, please refer to the Standard Dashboard Configuration Options section.

Standard Options: Name, Description, Header, Footer, Filter.

Gauge Type – Radial or Linear.

Goal Amount– A numeric prompt allowing the user to enter the number against which the total value will be compared (this is the gauge's "max amount".

Number of Markers – This is the number of "ticks" over the range .

Value Gauged – The way the data that is being represented on the gauge will be summarized. Options include Count, Sum, Average, Min, and Max..

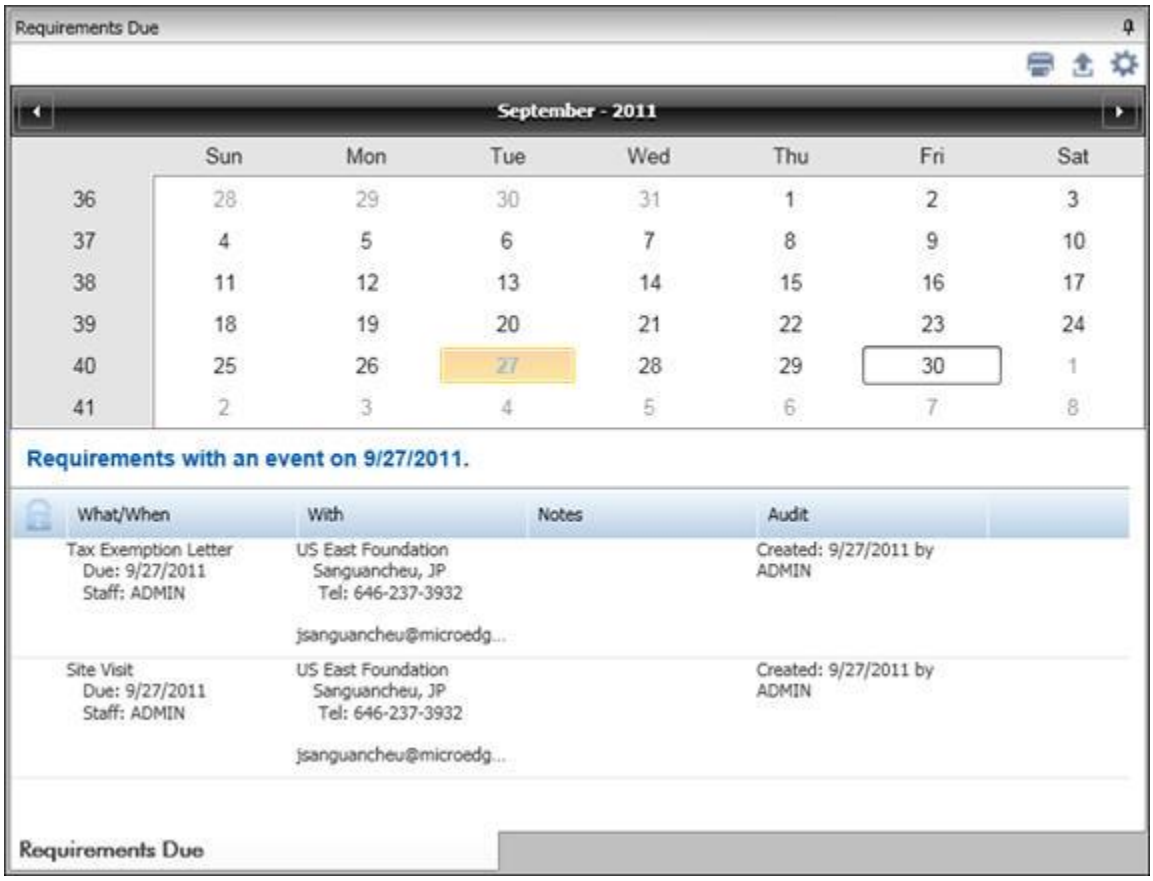
NOTE: These prompts will be disabled if no Filter information has been supplied.

Total value – The value to summarize. For instance, if the user chooses Grant Amount, then the Grant Amount for the records returned by the filter will be summed. Only currency and numeric fields will be available. The same options are available as those described for Columns in the Summary page part.

NOTE: These prompts will be disabled if no Filter information has been supplied.

The Calendar Dashboard Part

The Calendar is an improved replacement for the GIFTS Calendar View.



Display Options/Features:

Date browse - Left and right arrows allow the user to browse through different months. The month/year display at the center is a link. Clicking it allows the user to select from a grid of months. Clicking it again allows the user to select from a grid of years.

Calendar display - Days with events on them appear in blue, rather than black

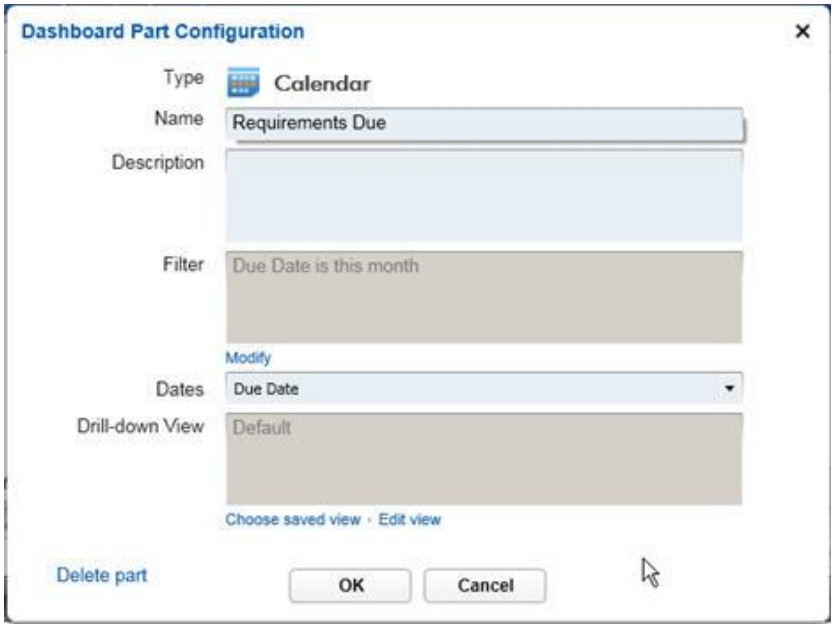
Drill-down - Clicking on a day with events displays the records associated with that day in the drill-down area below the Calendar. The View used to present the drill-down data is defined as part of the part configuration options. The drill-down area will include its own header: {Record type} with an event on {Date}, i.e. *Requests with an event on 8/8/2011*

Open a record - Double-clicking on any record in the drill-down to open the edit form for that record.

Dashboard Part header options:

- Print
- Export
- Configure or Delete

Configuration options:



NOTE: For descriptions of the standard options, please refer to the Standard Dashboard Configuration Options section.

Standard Configuration Options: Name, Description, Header, Footer, Filters

Dates

All of the Date prompts for the selected record type will be available in a multi-select drop-down (sorted alphabetically by label).

Simply check the boxes next to the ones desired. You can choose as many dates as you wish. The record will then appear under each date on the Calendar.

For instance, if the record type is Payments and the user selects both Schedule Date and Payment Date, the payment will display under both dates on the calendar.

NOTE: The dates available are only for the main Record Type identified by the Filter. If the filter is for Payments, for instance, only dates within the Payment Record Type will be available.

You can of course have entirely separate page parts for different calendar event types. For instance, you might have one Dashboard part that shows Calendar information for only your related records, and another that shows events for the whole foundation.

Drill-down View

This will determine the columns and sort order (but not the Filter criteria) of the table.

Choose saved view and **Edit view** links will be available under the Drill-down View field.

The Web Clipping Dashboard Part

The Web Clipping dashboard part allows you to display the contents of a specific web page on your dashboard.

You can add the Web Clipping page part to the GIFTS Alta dashboard as many times as necessary. Each Web Clipping page part will refer to a specific URL.

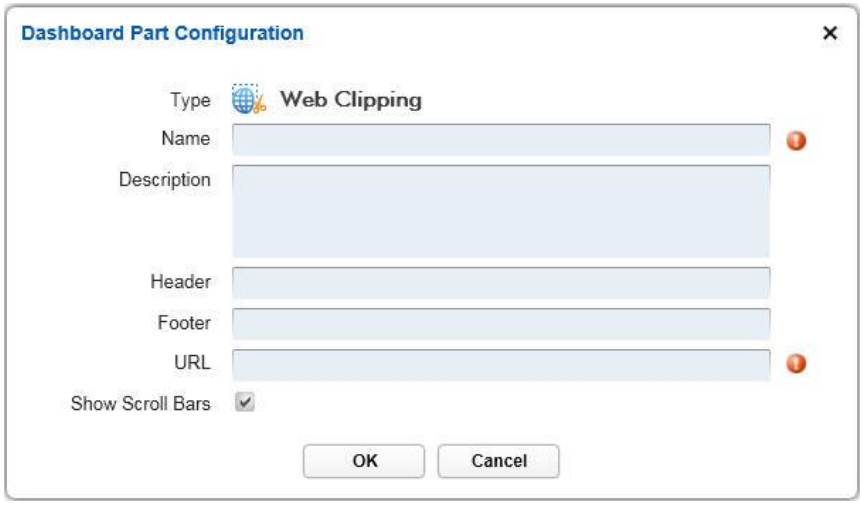
Display Options/Features:

All links on the page that is being displayed in the Web Clipping dashboard part will be functional.

CAUTION: GIFTS Alta has no control over where the links displayed in a web clipping take you.

Dashboard Toolbar Options:

Configure (gear icon) – displays the configuration options, detailed below:



Option	Description
Name	Name the Web Clipping Part to be used in your Dashboard Library
Description	A description for the web clipping part which will be displayed if the mouse cursor is placed over the Name.
Header	Text to be shown on the top of the web clipping.
Footer	Text to be shown on the bottom of the web clipping.
URL	The web address of the page you want to display in the web clipping including the *http://* or *https://*.
Show Scroll bars	Checked by default. Shows scroll bars to use if the web clipping part is too

	small to display the full page.

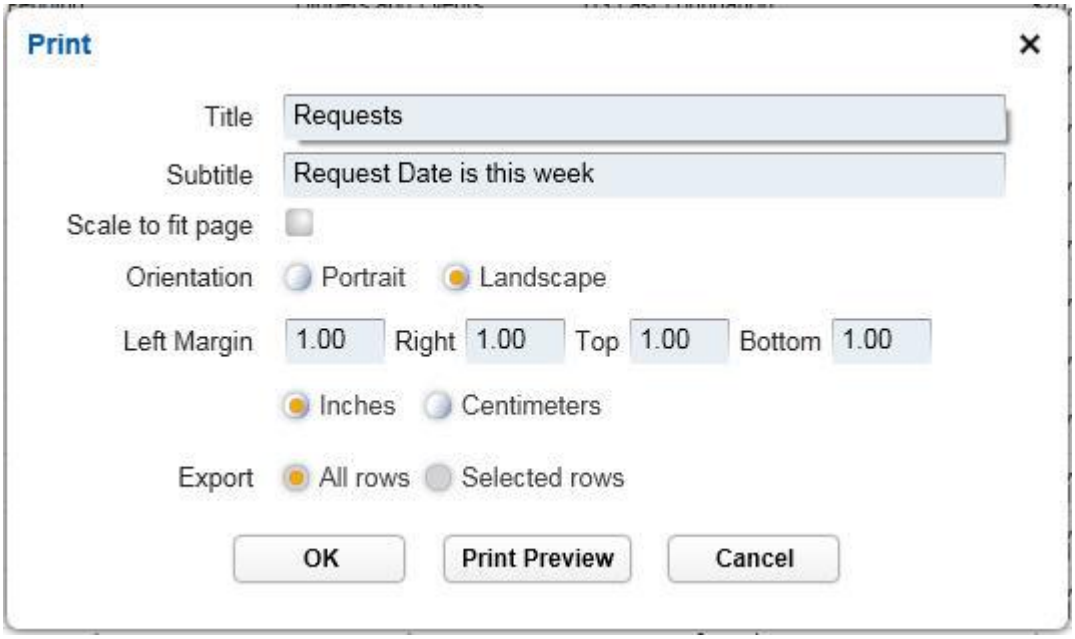
NOTE: The **Name** and **URL** fields are required.

Dashboard Part Toolbar

Each Dashboard part has a toolbar located on the upper right corner which displays icons representing standard options available.

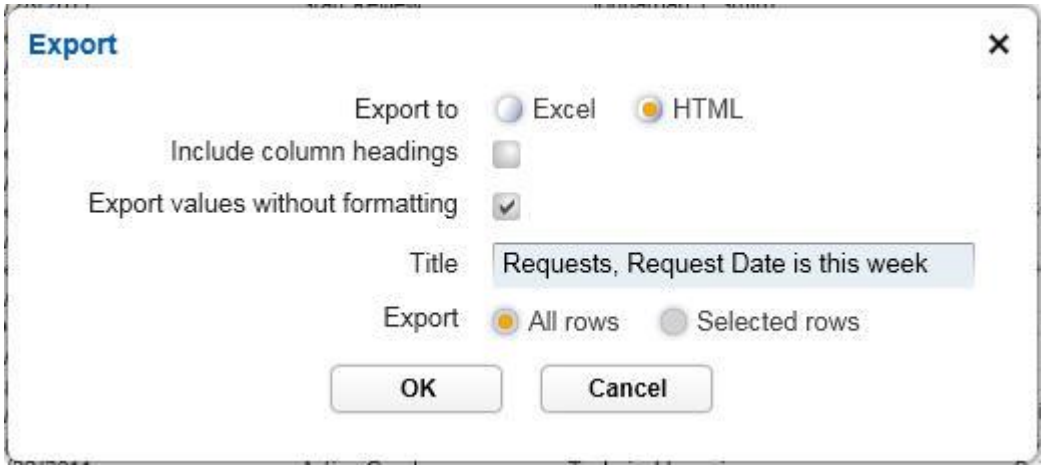
Print

Opens the standard Print form.



Export

Opens the Export form.



Workspace

Clicking this option takes you to the Workspace area where the contents of the Dashboard Part is displayed with the same settings.

Configure or Delete

Opens the Configuration Form for the specific Dashboard Part type.

Standard Dashboard Configuration Options

This section discusses the Standard configuration options common to all of the Dashboard Parts.

Option	Description
Name	The name given will be displayed on the header area of each panel.
Description	The description is displayed as a popup tool-tip on the Dashboard if the mouse pointer is placed over a part's title. It is also listed under the name if the dashboard part is saved to the Dashboard Parts Library.
Header	Optional text that appears above the Dashboard part content just below the title.
Footer	Optional text that appears at the bottom of the part.
Filter	This field will be gray and read-only. It will either show the name of the current Saved Search assigned or the search logic defined. Clicking the **Modify** link below will open the standard Search form where you can choose a Saved Search or use the Query Builder to create/edit a search. If an ad hoc search is already associated with the part when the user clicks the **Modify** link, the search form will display with the existing criteria loaded into the query builder, so the user can make changes. Clicking the **Select** button will save any changes and return you to the Configuration form.

Option	Description
	NOTES: • If a Saved View or ad hoc View is associated with a Saved Search, this read-only prompt will be populated with the name of that search, and the **Modify** link will be disabled. • If a Saved Search associated with a View is selected and no View parameters have been defined, the part View will automatically default to that View. (But the option to modify it will still be available.) If View information has already been defined, the user will be asked if they wish to overwrite it. • If the user changes the Record Type of the Filter, any associated View information will be cleared automatically.
View	You will have the option to apply a saved view, or create an ad hoc view to use with this part, just as you can on the Workspace. **Choose saved view** - use this link to open the Views Library and select a saved View. **Edit view** - use this link to open the View - [Record Type] form where you can define or modify an ad hoc view. • **Save** - this button opens the View Properties form where you can give your defined view a name and save it to the View Library. • **Apply** - this button closes the View form and applies any changes you've made to the View field on the Configuration form. • **Cancel** - closes the View form and returns you to the Configuration form.
Delete part	This link is used to delete the part from the current dashboard only. It does not delete the part from the Dashboard Part Library (if it exists there) or from the dashboard of any other user.

Please refer to the sections on Dashboard Part Types to see all of the configuration options available to each.

Adding Dashboard Parts

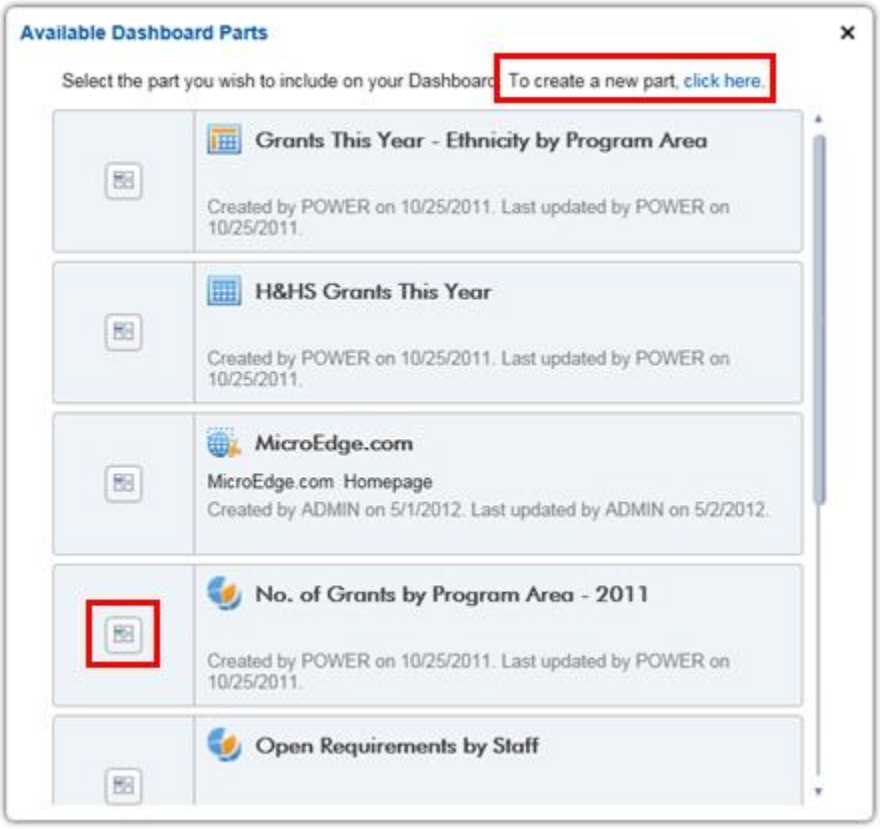
You will have the option to add parts at any time, regardless of the view mode being used unless the Dashboard is “locked.”

- In Panel View, the new panel will be added as floating and positioned in the center of the Dashboard. The user can then choose to re-size, move, or dock it just like any other panel.
- In Carousel View, the new panel will be added to the end of the list (the furthest to the right.)

To Add an existing dashboard part:

1. Click the **[+ Add Part]** link on the Dashboard footer to add a new Dashboard part. The Available Dashboard Parts list will display.

   Note: If you want to create a new part, click the **click here** link on top.



2. Double-click on the part you want from the listed parts or click on the center **Add to Dashboard** button (in the left panel.)

The part will be added to the Dashboard and a confirmation message will display.

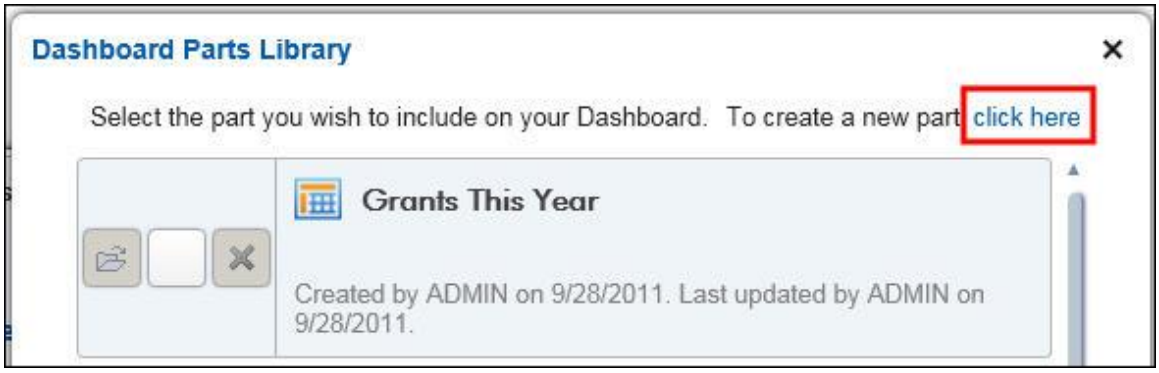
The Dashboard Part Library will remain open, so that you can add another part.

Creating a New Dashboard Part

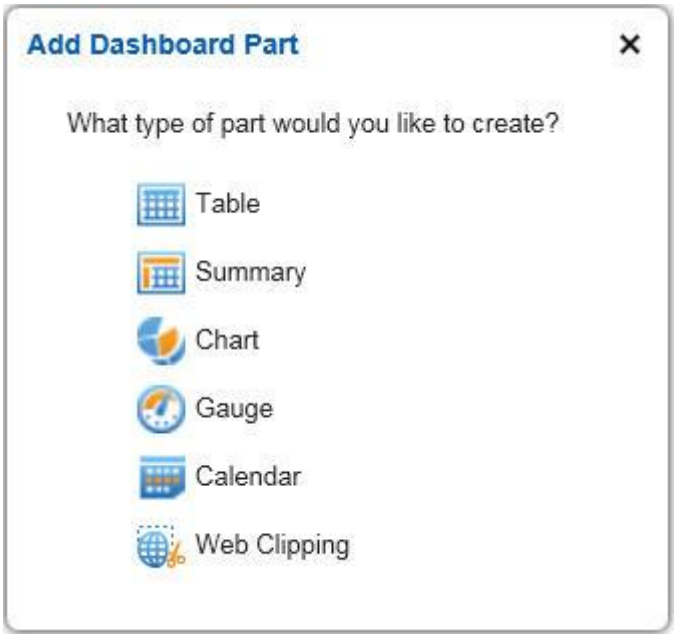
To Create a new Dashboard part:

From the Dashboard, click the [+ Add Part] link in the Dashboard Footer.

1. Click the **click here** link in the upper right corner of the Available Dashboard Parts list.



2. Select the type of part you wish to create.



3. Once you choose, a form will open with options specific to the type of part.

   Refer to one of the following for more details on the configuration options available:

   - Table
   - Summary
   - Chart
   - Gauge
   - Calendar
   - Web Clipping

4. Once the options are configured, you will be given the choice of simply including the part on your Dashboard, or of also adding it to the Dashboard Part Library.

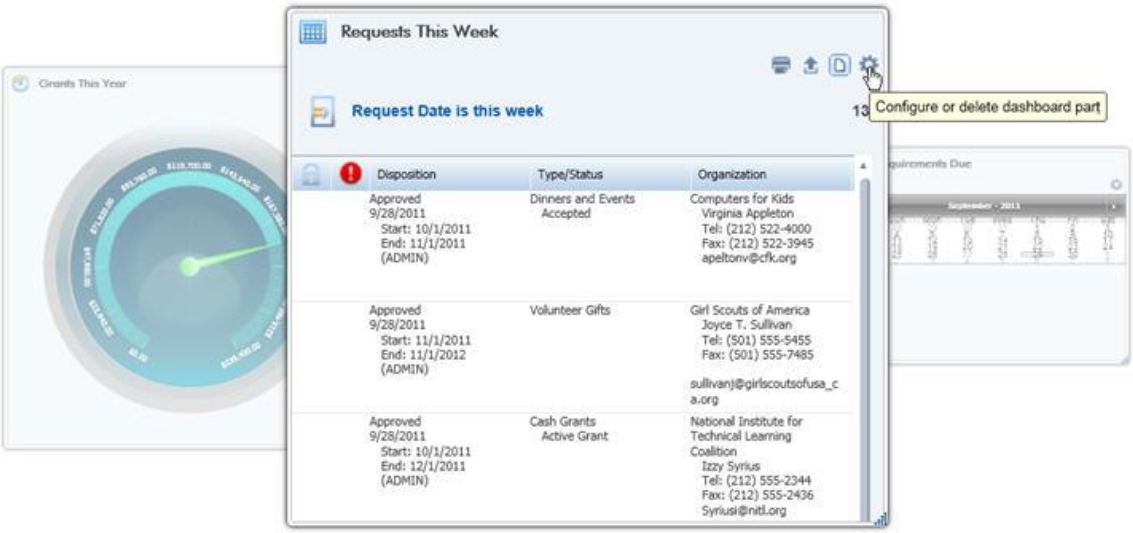
   The following dialogue will display:

Would you like to save {page part title} to the Dashboard Parts Library so other users can add it to their dashboards? Yes/No

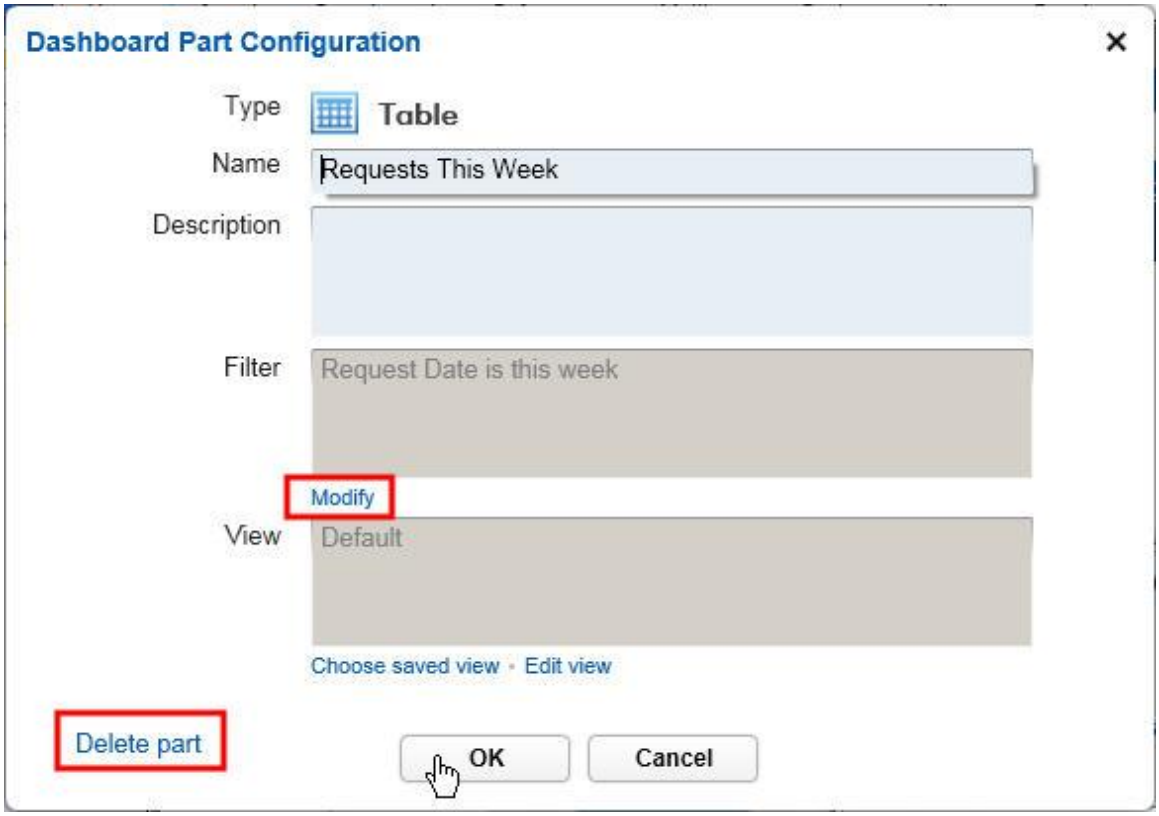
Modifying or Deleting Dashboard Parts

NOTE: This **Configure or Delete** option will be hidden if the User Preference to lock the Dashboard is enabled.

Each panel on the Dashboard will include a **Configure or Delete** button.



Clicking this button opens the Dashboard Part Configuration form.



To Modify, make you changes as needed and click the **OK** button.

To Delete, click the **Delete part** link in the lower left and click **OK** at the confirmation prompt.

Your Dashboard will refresh and immediately reflect the changes made.

NOTE: Changes made to the part options from the panels currently on the Dashboard impact only the current user, even if the part is included on the Dashboard Part Library. Using the **Delete part** link from a Dashboard Part's Configure form will not delete it from the Dashboard Library.

IMPORTANT: To make changes to a Dashboard Part so it can be rolled out to all current users or delete a Dashboard part from the Library, you must access the Dashboard Parts Library from the User Menu. (**User menu > Libraries > Dashboard Parts**)

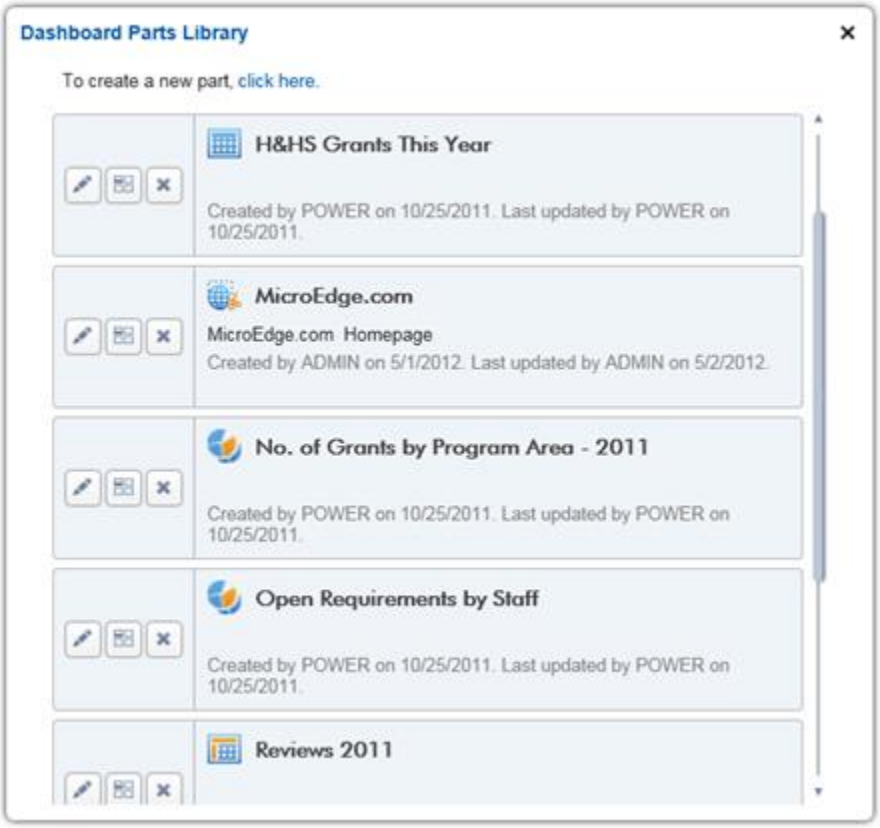
The Dashboard Parts Library

The Dashboard Parts Library stores the configurations for all your saved Dashboard Parts.

There are two main ways to access the Dashboard Parts Library:

Access Method	Description
Dashboard > Add Part	This method allows you to:

Access Method	Description
	1. **Create** a new Dashboard Part and Save it to the Library 2. **Add** an existing Dashboard Part to your Dashboard
User Menu > Libraries > Dashboard Parts 	This method allows you to: 1. **Create** a new Dashboard Part and Save it to the Library 2. **Edit** an existing Dashboard Part, save changes to the library, and roll out changes to current users 3. **Add** an existing Dashboard Part to multiple user's Dashboards 4. **Remove** the Dashboard part from the Library



A click here link on top allows you to create a new dashboard part.

Existing parts will be listed in alphabetical order by **Name**. The Name is preceded by an image indicating the type of display. Each image will display a tool tip if you hover the mouse cursor over it.

The **Description** for each part displays below the Name, followed by the user and date of the person who created the part, and the person who last updated it.

When you add a Dashboard part to your Dashboard from the Library, the system copies the definition of that part to your Dashboard. That copy will include an ID linking the part back to that record in the Dashboard Part Library. The system uses this ID to see if other users are using the same Dashboard Part when you make a change.

CAUTION: There is no specific permission governing the ability to add or remove parts from the Dashboard Parts Library. You must be very careful when accessing the Dashboard Parts Library through the User Menu to not inadvertently change or remove Dashboard Parts being used by other users.

Edit Library Part

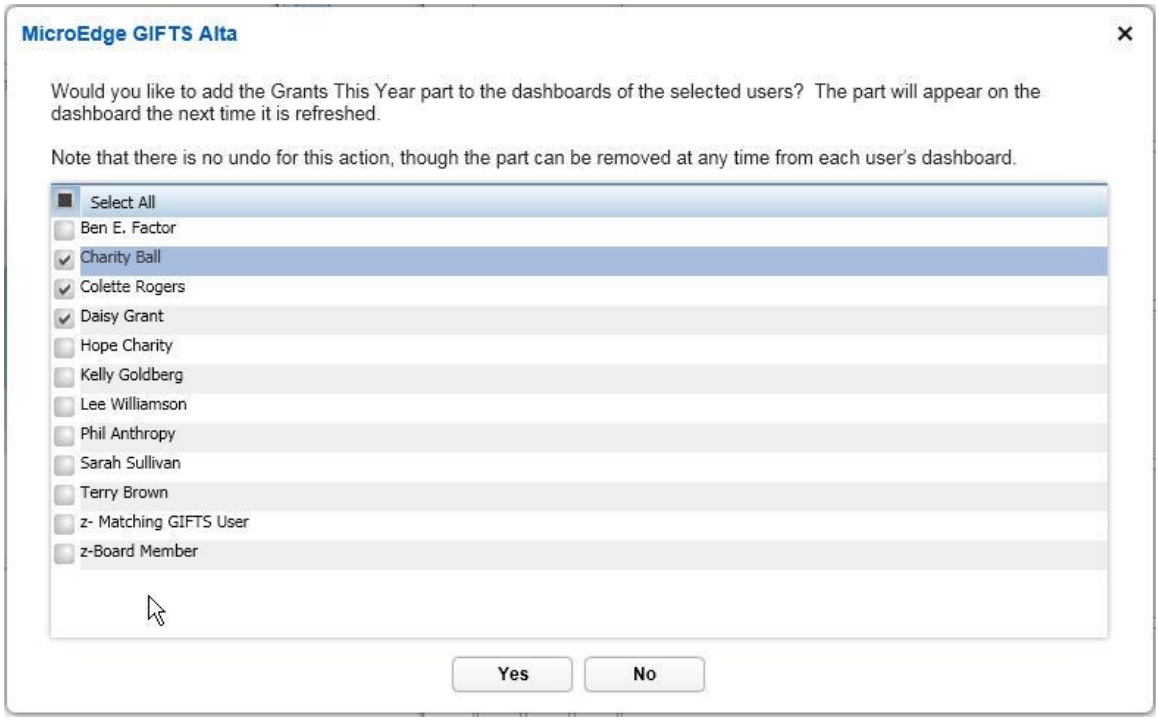
This button open the Dashboard Part's Configuration form allowing you to make changes to Name, Title, Description, and other filter criteria.

If you make any changes to the part to any values other than the Name and Description, when you click **OK** to save the changes, the system will check to see if any users (including the current user) have that part on their Dashboard. If so, you will be given the option to roll out those changes to those users.

Add to Dashboard

When in the Dashboard Library, an administrator can click the **Add to Dashboard** (center) button for an existing Dashboard Part and add it to multiple users.

Clicking the Add to Dashboard button opens a dialogue window listing all current users.



Check the boxes next to the users you want to rollout the Dashboard Part to and click **Yes**.

The next time the users log in to GIFTS Alta or refreshes their Dashboard, the new Dashboard part will appear.

Remove

The remove button removes the part from the Dashboard Part Library, and optionally removes it from the dashboards of individual users.

Working with the Workspace

TIP: The Workspace has replaced the GIFTS Organizer as the advanced information management tool. For prior GIFTS 6.x users, although the new Workspace looks quite different from the old GIFTS Organizer, much of the same functionality is still present. They've just been reorganized to make working with records much simpler and easier.

The Workspace has been geared specifically for the Grants Manager to search for and work with grant making data with a minimum amount of effort. The tools available here allow the Grants Manager to perform many tasks from simple searches to complex queries to answer both specific and general questions ('How much did we give to Arts programs last year?', 'When was the last grant we gave to the Brooks Ballet'). The results of which can then be used to take action on multiple records at once.

This help topic describes how to use the Workspace to view your grant making data.

Workspace Layout

Working with Records in the Workspace

Using the Related Links Feature

Working with the Workspace Columns

Advanced Workspace Sorting

Using Workspace Saved Views

Exporting Data from the Workspace

Viewing Summary Information

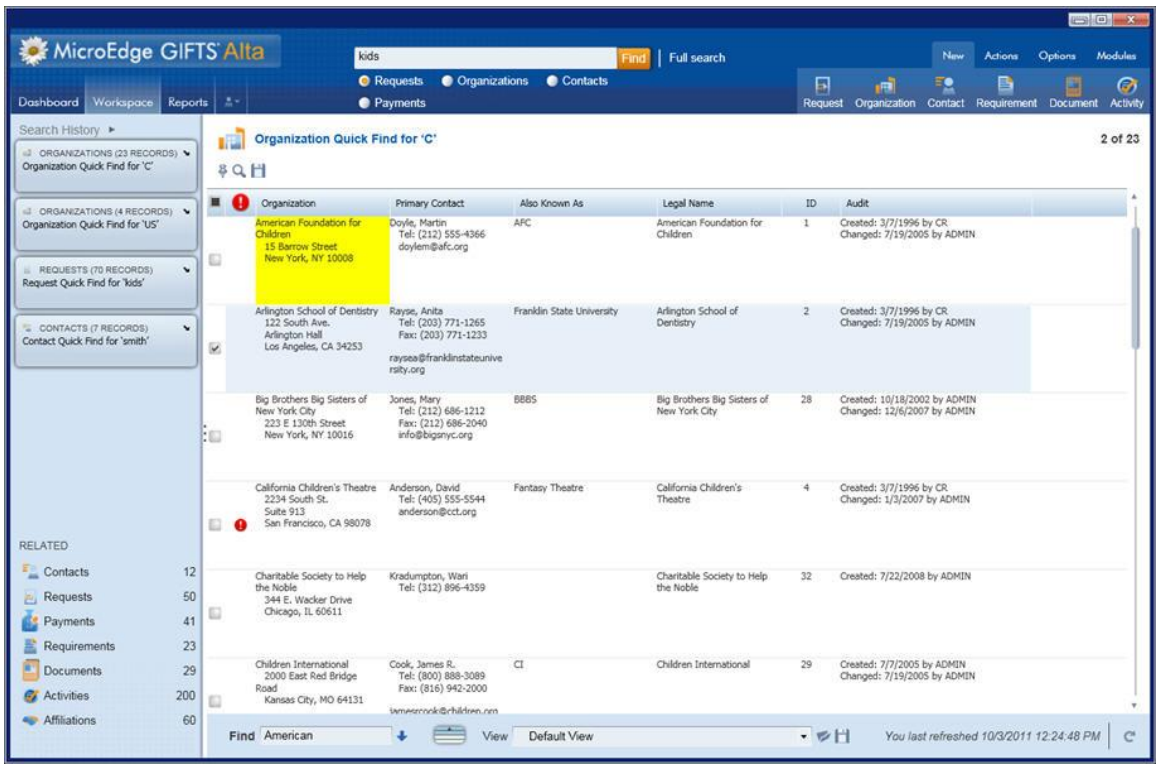
Chart Records in the Workspace

Refreshing the Workspace Grid

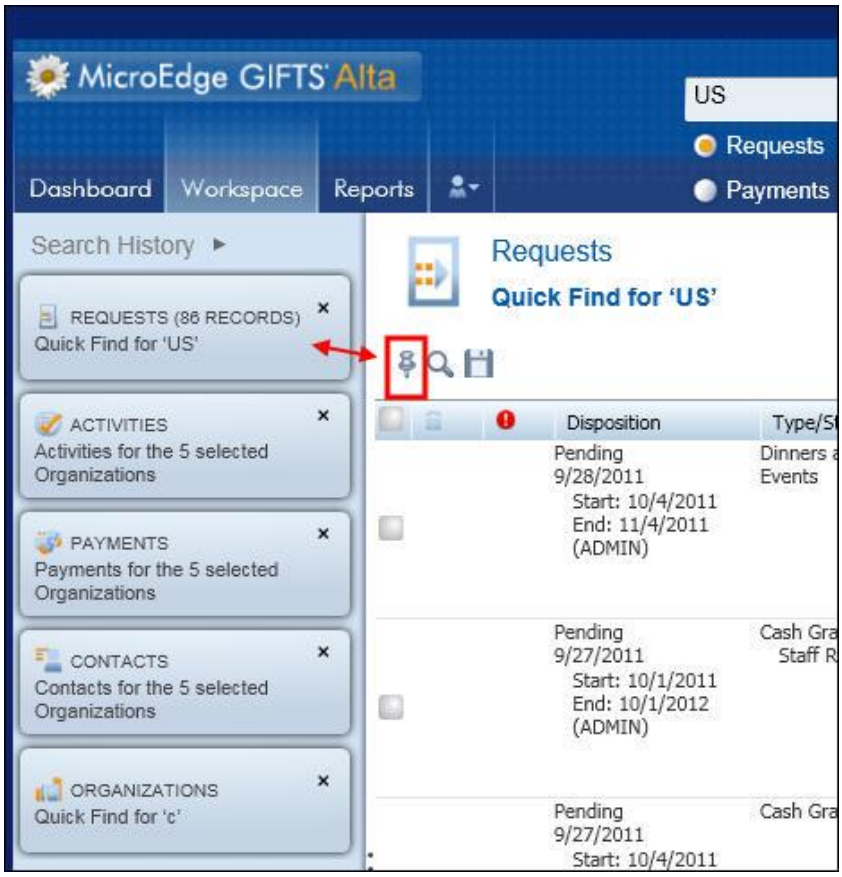
Refreshing System Settings

Working with Combined Columns

Workspace Layout



Left Panel	Description
Search History	Opens a popup allowing you to re-run searches from the recent past. The searches will be organized in collapsible sections by the date on which the search was run. They will be listed in descending order, with the most recently run search on top.

	The last six days' worth of searches will be stored for each record type. Each time you login, the last five days of searches are loaded and the older searches are cleared.
Pinned Search Cards	Pinned searches will be displayed here as 'cards'. Each one will display the record type, number of results, and a **Close** icon in the upper right corner. Simply click on a card to see the results of that particular search. Click the **Close** icon to remove the card from the left panel. Pinned searches remain in place even when you log out and log back in to Alta.  **TIP:** When viewing a pinned search, any selected records (checked), will be saved with the pinned search card until you log out of Alta. This allows you to perform other searches and then return to the same pinned search and have the records still selected. **NOTE:** There is no limit to the number of pinned search cards you can save to the left panel. However, it is recommended to not create too many as managing them could become cumbersome.
The Left Panel	The left panel is separated by a slider bar, and can be resized

Resize Bar	according to your preference. **NOTE:** The position will not be remembered between sessions.
Related Records	This lower left area lists links related records related to the selected record(s). The count beside the link indicates the number of related records of that type. Click on a record type to view the full list.
Search Results (TOP)	
Search Title	The title displays the icon for the record type and the name of the Saved Search used or the criteria used in the Quick Find or Query Builder search.
Back button	This left pointing arrow will become available when you use the Related links to view other record lists. **TIP:** There is no Forward button. If you want to return to a related links list with all the records you selected still checked, remember to **Pin** it before going to a different page.
Pin Search	Below the title is a pin icon allowing you to save the currently displayed search as a pinned search card on the left panel. You can pin several searches in this manner.
Refine Search	Opens the Search form in Query Builder mode with the current filters displayed. You can then modify the filters as desired or select a Saved Search instead.
Save	Opens the New Search form where you can save the current search to the Saved Searches library for future use.
Count	The count of records returned by the search, as well as the number of records currently selected.
Search Results (MAIN)	
Column Headers	Many column headers can be used to sort your search results simply by clicking once for Descending and twice for Ascending. A small arrow will appear next to the column name to show which direction the sort is going.
Select Record	The left most column is the selection column. Check the box next to

Boxes	one or more records to focus on those records and see how many related records are available. **NOTE:** Checking the box in the column header will select ALL records currently displayed in the search results.
Alert Column	If an alert notice is enabled for the specific record, a red alert icon will be displayed here. Mouse over the icon to see the message.
Resize Columns/Rows	To resize a column or row, move your mouse pointer over the adjacent grid line until the pointer turns into a double arrow then left click and hold the mouse button down while you drag the line.
Lower Toolbar	
Find	A Find option to locate a specific text string within the search results, so that the user can find and/or jump to a specific record. The up/down arrows represent Next/Previous functions. The found text string will be highlighted in yellow on the search results list. **NOTE:** This feature only finds the Next occurrence of the search string, not ALL occurrences of the search string at once.
Show Selected at Top or Show Selected as Sorted	This icon changes depending on the current mode being used. The default for the Workspace is Show Selected as Sorted view. **Show Selected as Sorted** - this means the search result are listed according to the current sort selected. Either default alphabetical or by column heading sort. **Show Selected at Top** - this moves all selected (checked) records in the current search results to the top of the list.
Views	A drop-down with the list of available views for the current record type. **NOTE:** Any Saved Views with an associated Saved Search will be listed with a disk icon to the left of it. **Open View Icon:** This option opens the View window allowing you to modify the currently used view. **Save View Icon:** This option lets you save the current view as a new Saved View or update the current saved view being used if you have made changes.
Refresh	This text shows the date and time the search results were last refreshed: *You last refreshed mm/dd/yyyy; hh:mm* Next to the text is a **Refresh** button allowing you to refresh the search

	results on demand. **NOTE:** Note that when a saved search is refreshed, the criteria for the search are taken from the saved search record.

Working with Records in the Workspace

This section discusses how to work with various records in the Workspace.

NOTE: For detailed information about data entry, please refer to the chapter that details the type of record you want to work with.

Selecting Records to Get Related Information

GIFTS organizes grant making information by maintaining associations between related records. By selecting specific records in your search results, you can easily retrieve and work with the data related to any record.

For instance, assume you are working with search results showing several Request records. In addition, you may need to access information on related requirements and scheduled payments.

You can select a specific Request record to automatically find out what other related records are available in the Related list. Then, you can move from one records list to another, viewing the records relevant to the Request you selected.

In addition, the other Requests that met your original criteria are still displayed in the workspace, so you can quickly select another Request or switch back and forth among a whole set of Requests at once. This can be done with the search results for any record type.

In short, all the information related to the Request—though it is contained in separate records—can be retrieved by simply selecting the record and using the Related links.

Selecting a Single Record

To select a single record in the Workspace, check the Select box. 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 select several records at once to view their related records.

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 Workspace grid, you can do one of the following:

- Click the **Select All** box at the top of the Select column
- Press **CTRL+A**

All of the records in the Workspace 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 Workspace grid and go to Actions > Open.
2. Double-click on the record.

The record is opened.

Opening a "Locked" Record

If a record is being modified by another user, it is "locked" so that you are limited to opening and viewing 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 Workspace 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 any work area, you can create a new database record. To create a new record, go to the **New** menu on the ribbon menu and select the appropriate record type. When the new record edit form opens, you will be required to specify it's primary relationships as shown on the right panel.

Using the Related Links Feature

The Workspace 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 Related Links feature. When you select a record or group of records, the Workspace automatically locates all of the information related to that record or records.

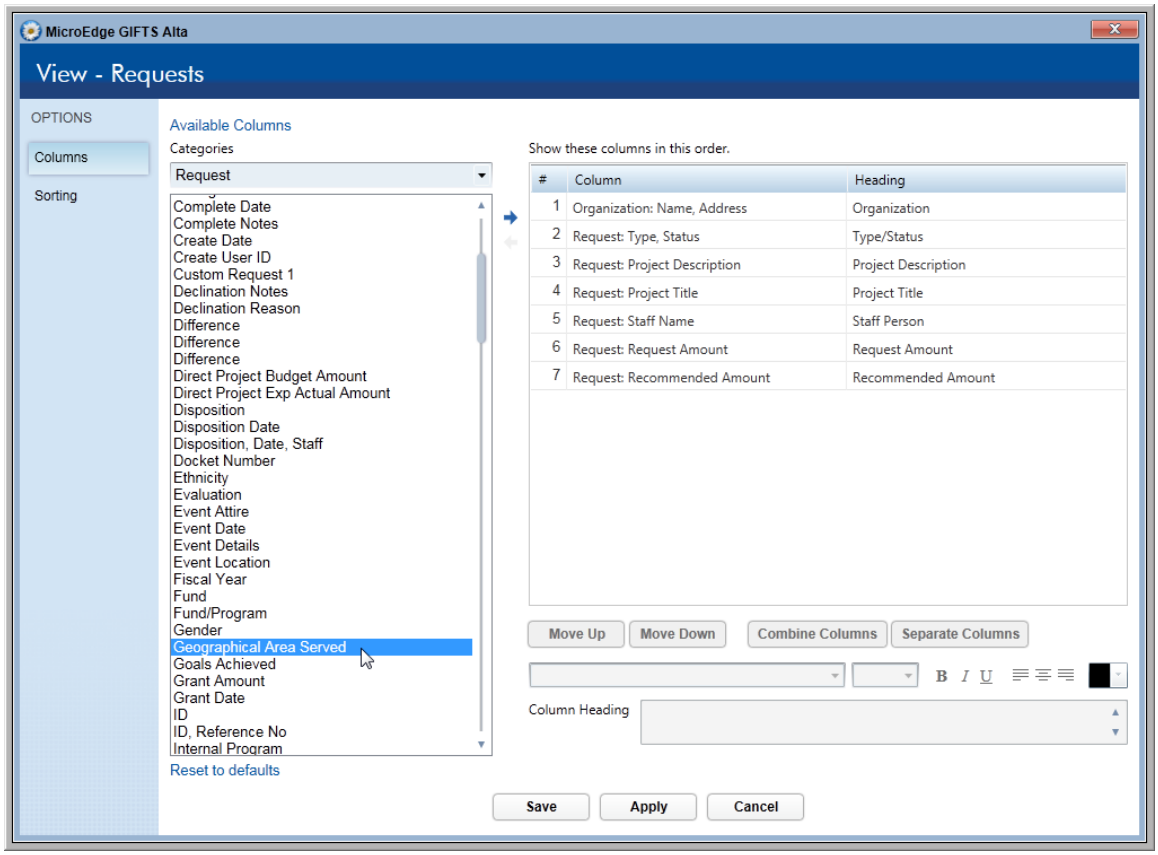
Then, you can then simply click back and forth between the different record types, viewing and accessing information as necessary.

Working with the Workspace Columns

By default, the Workspace displays of the various record types include the information commonly needed by most grant makers. You can choose a variety of columns to be displayed in the Workspace, and remove columns that you don't need.

To customize the columns to be included in the Workspace:

1. Run a search and view the results in the Workspace.
2. Leave the **View** set to none, or select one of the saved views listed in the drop-down.
3. Click the **Open View** icon to open the View configuration form.



From this window, you can:

- Add columns to the Workspace
- Edit the Workspace 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 Workspace
- Change the position of columns in the Workspace grid.
- Remove columns from the Workspace
- Combine columns, displaying the data they contain in a single column
- Reset the default columns using the **Reset to defaults** link

TIP: You can save your column settings, including the width of each column, as part of an Workspace *View*.

Adding Columns to the Workspace

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

NOTE: Individual coding sheet codes are listed under the record type category along with standard and custom fields.

You can use the list at the top 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 Workspace grid:

1. Go to the Workspace grid that you want to customize and choose **Open View**. The View window opens.
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 the right arrow to add it to the Workspace 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, "Request: Geographical Area Served."
4. Click **Apply** to save your change and return to the Workspace grid.

Editing Column Headings

To Edit the Columns Displayed in the Workspace:

1. Go to the Workspace grid that you want to customize and choose **Open View**. The View window opens.
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 (lower left of the Show Columns window). 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.)
4. Click **Apply** to save your change and return to the Workspace grid.

Formatting a Column

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

1. Go to the Workspace grid that you want to customize and choose **Open View**. The View window opens.
2. In the column grid, select the column you wish to format. The buttons in the formatting toolbar become available.
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. Click **Apply** to save your change and return to the Workspace grid.

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

You can set the following options:

- 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]

- Don't display currency symbol

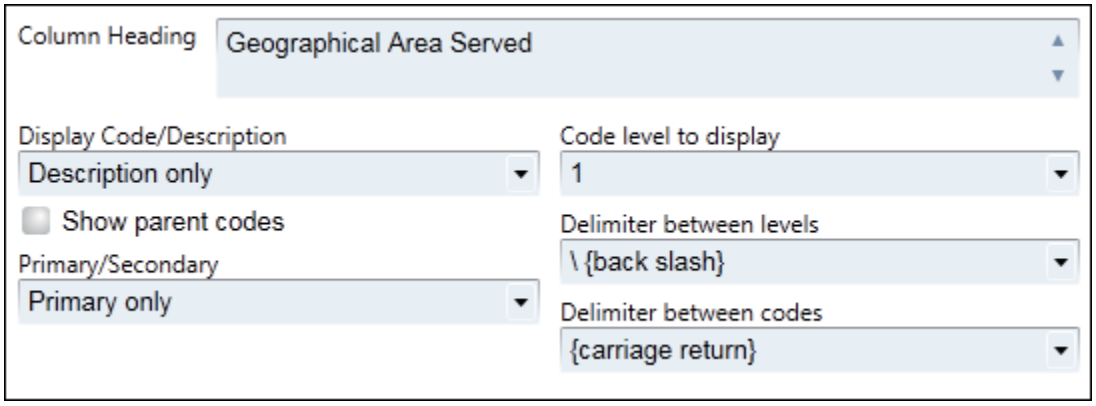
  Indicates whether or not the applicable currency symbol should be displayed.

- 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 coding sheet codes, you can set the following options:

- 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.*)*

Numbers
You can set the following options:

- 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:

- 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.

- 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.

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 Workspace, you can do one of the following:

- Access the **View** 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 Workspace, find the column you wish to move. Click and drag the column to a new position within the Workspace 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 Workspace 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 Workspace:

1. Go to the Workspace grid that you want to customize and go to **Open View.**
2. In the column grid, select the column you wish to remove. An arrow indicates that you have selected it.
3. Click **Left arrow**. The column is removed from the list, and will not be displayed in the Workspace.
4. Click **Apply** to save your change and return to the Workspace grid.

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 Workspace allows you to maximize the amount of data displayed on the Workspace 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.

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 Workspace search results view that you want to customize.
2. In the column grid, select the column you wish to combine and drag it on top of another column until double arrows appear then drop it. The two columns will become stacked on top of each other.

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

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 and drag it out to the new desired location.
2. When you are in the good spot, the system will show double arrows on top and bottom.
3. Drop it there and you're all done.

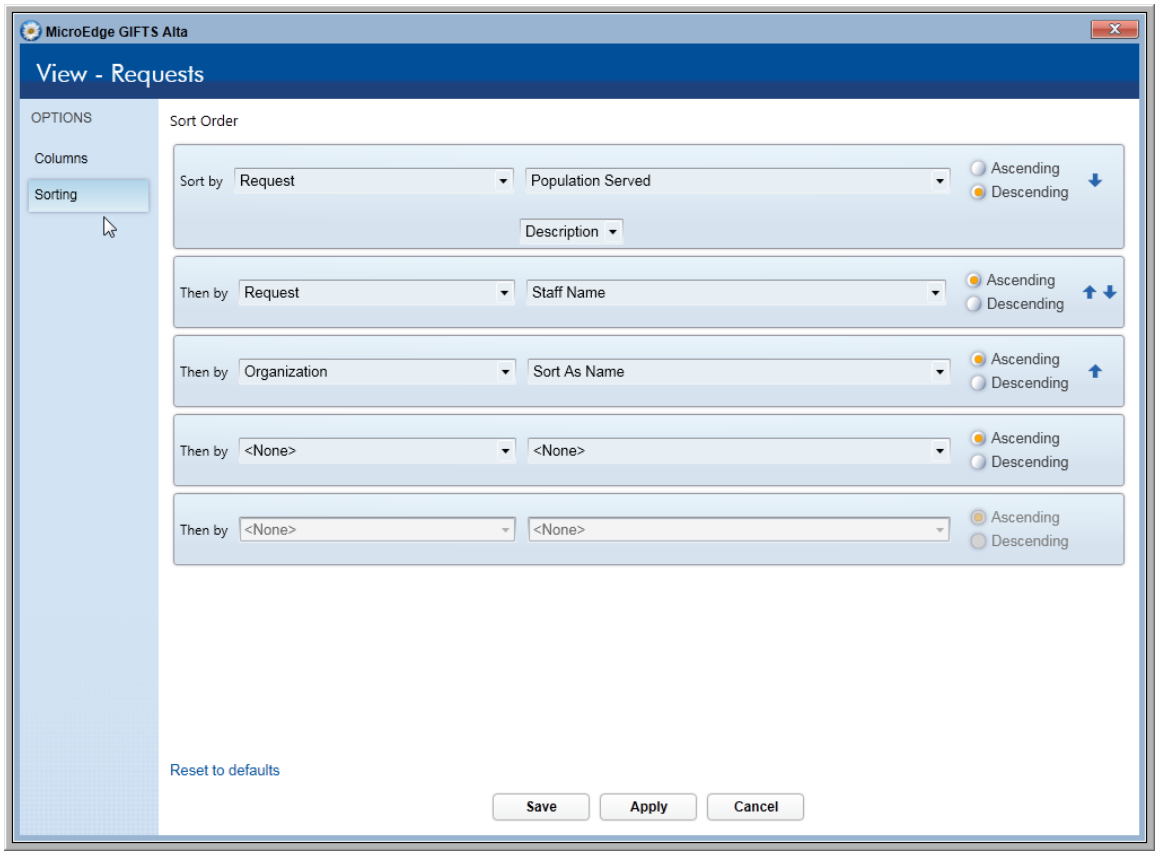
Advanced Workspace Sorting

By default, records in the Workspace are sorted either alphabetically or by date. For example, Organizations are sorted alphabetically and Payments are sorted according to their Schedule 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.

To change the sort order for the results on your Workspace:

1. On the lower toolbar click the **Open View** icon.
2. Select **Sorting** on the left Options panel to display the Sort Order manager.



3. The top Sort by setting displays the default sort order. The available columns are divided into the categories of information that they represent.

   Example: The columns available in the Requests listing are divided into categories such as Population Served or Staff Name. Coding Sheet codes, such as Population Served, will also have an extra menu to select sort by Code or Description.

   The Workspace 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. Then, choose whether you want the sort order to be ascending or descending.

   Note: You can always click **Reset to defaults** at the bottom if you don't like the modifications you've made..

4. Choose *Then by* 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 **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.

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

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.

Using Workspace Saved Views

Workspace Views allow you to combine and save Workspace 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 Workspace 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 Reporting from the Workspace.

About Workspace Saved Views

GIFTS maintains a separate list of saved Views for each record type, 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 Workspace.

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 the Workspace, 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.
- **Workspace 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:** Workspace 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 Workspace 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.

Public vs. Private Views

When you save a new Workspace 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 a New Saved View

TIP: Whenever you want to save your current Workspace settings as a View, choose **Save View** next to the View drop-down menu in the footer toolbar.

1. While in the Workspace, click the **Open View** icon in the footer toolbar to open the View editing window.
2. To edit the column settings of the View, make sure the **Columns** button is selected on the left panel. Modify the column options as needed.
3. To edit the sort order of the View, click the **Sort** button on the left panel. Modify the sort options as needed.
4. Click **Save** to save the current view to the Views Library.

   Note: On the Save View form, you can assign a Saved Search to the your view before saving.

5. Click **Cancel** to return to the Workspace without saving or changing the view settings.

Modifying the Current Workspace View

1. While in the Workspace, click the **Open View** icon in the footer toolbar to open the View editing window.
2. To edit the column settings of the View, make sure the **Columns** button is selected on the left panel. Modify the column options as needed.
3. To edit the sort order of the View, click the **Sort** button on the left panel. Modify the sort options as needed.

4. Click **Apply** to apply your changes to the current Workspace.

   Note: This does not save your changes to any Saved View you may currently have applied to the Workspace.

5. Click **Cancel** to return to the Workspace without saving or changing the view settings.

Modifying a Saved View

There are two ways of modifying a Saved View that is currently in the Library.

From the Workspace:

1. Use the **View** drop-down to apply the Saved View and then click **Open View** to open the View settings.
2. Make the necessary changes and click **Save**.

From the Saved Views Library:

1. Go to **User Menu > Library > Saved Views**
2. Locate the View desired and click **Change Columns and Sorting** under the name to open the View settings window.
3. Make the necessary changes and click **Save**.

Applying a Saved View

To apply a Saved View to the Workspace:

1. On the Workspace, select a saved view from the **View** drop-down menu.

Deleting a Saved View

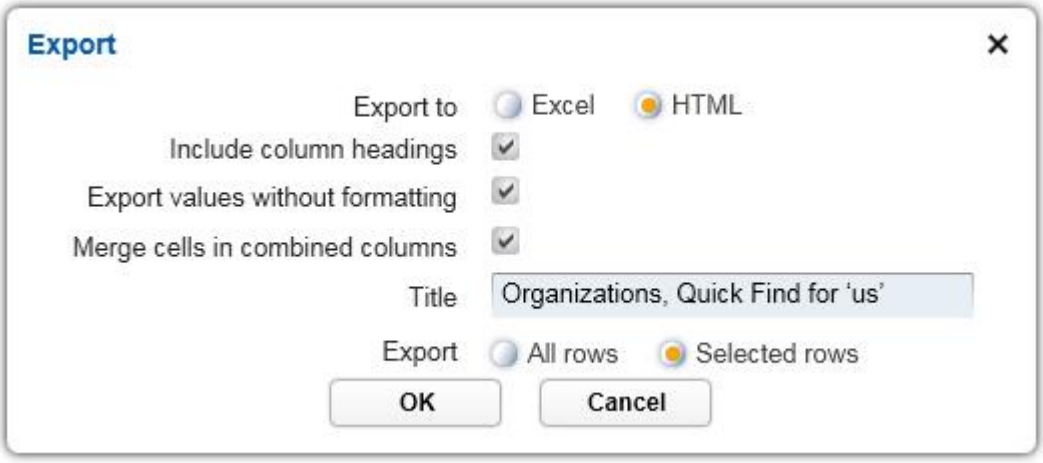
To delete a Saved View:

1. Go to **User menu > Libraries > Saved Views**
2. Locate the View you wish to delete and click the **Delete** link under the name.

Exporting Data from the Workspace

You can export the data in the Workspace so that you can format or modify it in your own spreadsheet program or HTML editor.

To export the records you have selected in the Workspace grid, go to **Options > Export** on the ribbon menu.



Select from the following options:

1. **Export to** - Excel or HTML format
2. **Include column headings** - check if you want the column headings included in the export
3. **Export values without formatting** - check if you don't want special formatting included in the export
4. **Merge cells in combined columns** - if you have combined two or more columns on the current view, keep this checked so they do not get split into separate cells when converting to Excel.
5. **Title** - only available if HTML is selected above.
6. **Export** - select from **All rows** or **Selected rows**
7. Click **OK** to complete the process.

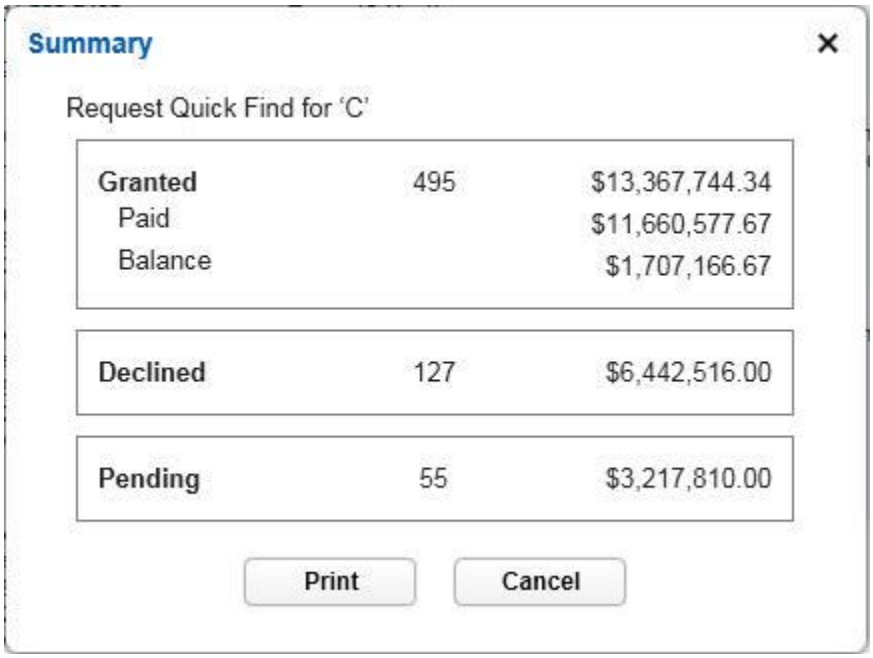
- If Excel is selected, MS Excel will automatically open with your new spreadsheet displayed. You can now modify the data as needed. Make sure to **Save** your work.
- If HTML is selected, the table will open in a browser window. You then have the option to **Save As** or **Print**.
- The **Export values without formatting** option, if unchecked, will include text font/size/color in the export. Number and Date formatting must still be set manually in Excel.

Viewing Summary Information

Using the **Options > Summary** button on the ribbon menu, you can generate and view summary data for all the records displayed in the Workspace grid.

Summary Views are only available for Requests, Contacts, and Payments record types.

Requests summary below:



You can click **Print** to print the summary.

Chart Records in the Workspace

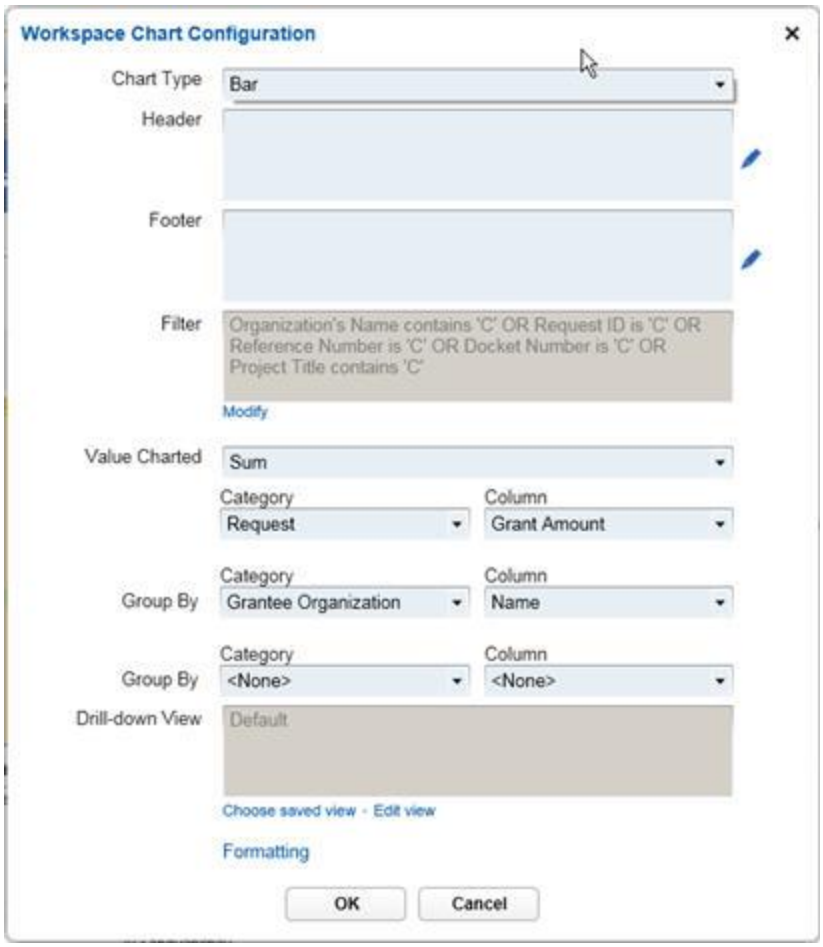
GIFTS can create a chart for records in the Workspace. For each type, appropriate kinds of data are available for charting. You can also choose the categories you want the data grouped by. Note that the data in the chart comes only from the Organizations, Requests, or Payments currently displayed in the Workspace.

NOTE: If you've created Charts on the Dashboard, you'll be very familiar with the Charts form from the Workspace. Charts created on the Workspace can only be Exported. They cannot be printed directly or placed on the Dashboard.

Creating a Chart

To generate a chart of the summary data:

1. Use the Quick Find or Full search to select the Organizations, Requests, or Payments you want to chart. The records are displayed in the Workspace grid.
2. Go to **Options > Chart** to open the Workspace Chart Configuration window.



3. Click the **Chart Type** button to select between the various Pie, Bar, Line, and 3D charts available.

4. Choose the **Value Charted** options that you want to be reflected in the chart.
5. Select a **Group By** category and columns.
6. Select a **Drill-down View** if desired.
7. Click **Formatting** to access and configure the X/Y Axis settings, Legend settings, and other options. Click OK.

5. Click **OK** on the Workspace Chart Configuration form to see your new chart.

For full details on all the options on the Chart form, see The Chart Dashboard Part.

Changing to Another Chart

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

Simply click the **Configure** icon in the upper right corner of the Chart window.

Refreshing the Workspace Grid

As you are searching for and working with records in the Workspace, 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:

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 Workspace display as you work. You can choose to refresh the selection of records, or choose to refresh the data. This second option is not available for client/server (SQL Server/Oracle) editions of GIFTS, which refreshes by selection only.

To Set the Refresh Mode:

1. Go to the **User Menu > Preferences**.
2. For the Search results refresh setting, select either **Data** or **Selection** and click **OK**. 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 **Selection** when you save the Request, it will disappear from the search results list 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 **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 Workspace.

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 Workspace folder, click the **Refresh** icon in the lower right corner. The display is refreshed.

Refreshing System Settings

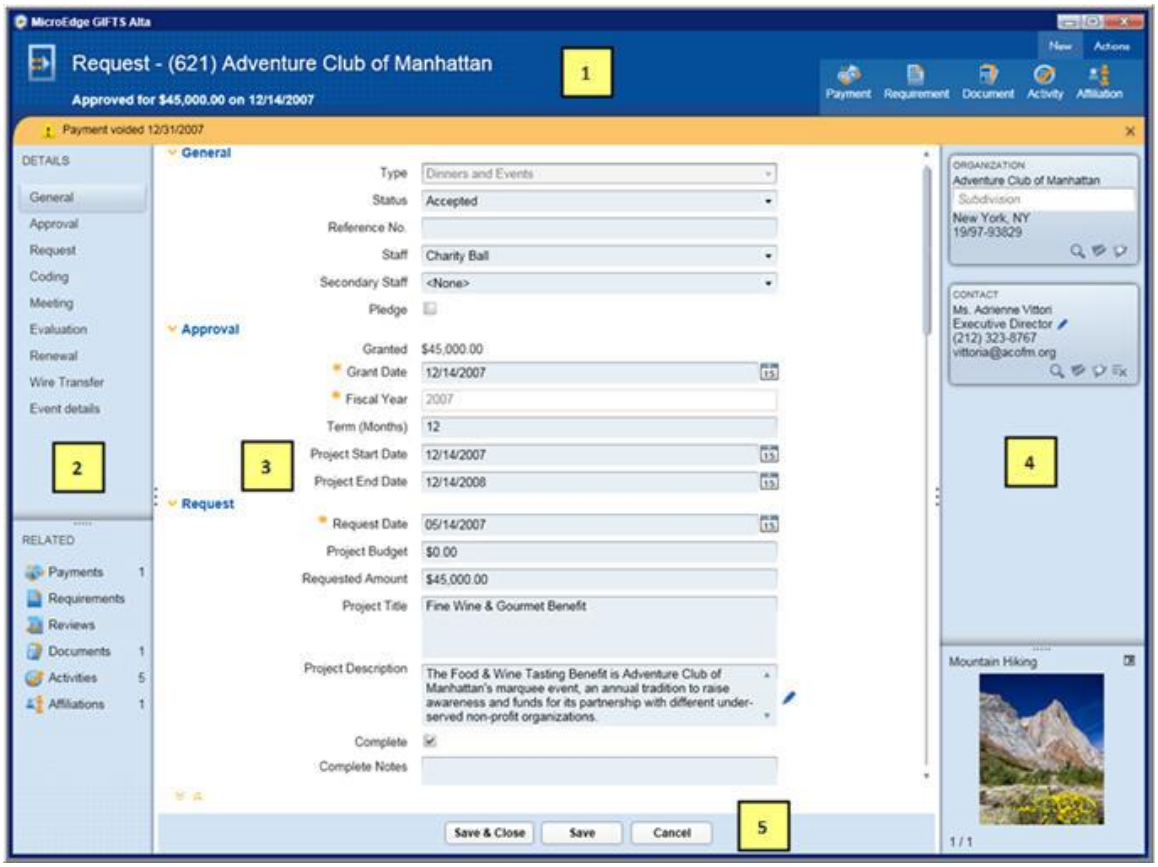
If your administrator makes any changes to codes or settings while you're logged into GIFTS, you'll need to refresh your system before the changes will be available. To refresh any code or setting changes, go to **User Menu > Refresh System Settings**. GIFTS may also be refreshed by logging out of the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

About Edit Forms

In previous versions of GIFTS, opening a record resulted in a small window display that required the use of tabs to navigate to the different sections of data.

In GIFTS Alta, the entire page is utilized in what's called an Edit Form to give you a 'big picture' view of all the information related to the record and the possible actions available at once.

The Edit Form also provides you with Related Records Links, Primary Relationship Cards, and an Image Viewer.



This section will cover the following topics:

1. The Edit Form Header
2. The Edit Form Left Panel
3. The Main Data Entry Area
4. The Edit Form Right Panel
5. The Footer Bar
6. Setting Currency Preferences
7. Locking a Record

The following record types have their own Edit Forms:

- Organization

- Contacts
- Requests
- Payments
- Requirements
- Reviews
- Documents
- Activities
- Affiliations

The Edit Form Header

The left side of the header area on an Edit Form displays the record type icon, the form title, and the read-only status information for some record types.

An example of a read only status message might be an Approved Request which would display *Approved for $45,000 on 12/14/2007*.

Alert Messages

If an Alert message is set, it will be displayed in an orange bar directly below the header area of the edit form.

Alerts can be set using the **Set Alert** option on the Actions menu of a record's edit form.

Alerts are available for the following record types:

- Organizations
- Requests
- Contacts
- Payments
- Donors
- Matching Gifts
- Volunteer Gifts

When the Set Alert option is selected, the orange bar is displayed with a text field for you to type in the message. When you **Tab** out or click out of the field, the text box will disappear the message will appear to be read-only. To change the message, simply click the message to display the text field again. To remove the alert message, click the **Clear Alert X** icon on the right side.

Ribbon Menus

The right side includes adaptive ribbon menus. Most Edit Forms will have menus for **New** and **Actions**.

Actions

The Actions menu will be selected by default when opening an edit form and allows you to take specific actions on the record currently open depending on what record type it is and the current status of that record.

New

The New menu is used to create new records that are related to the current record.

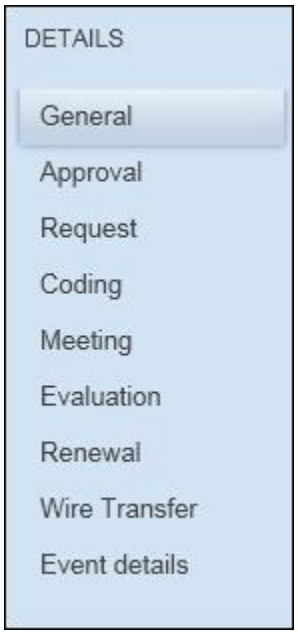
NOTE: If you are editing a new record that has not yet been saved, and therefore has not yet been assigned a record ID, a message will display requiring you to save the current record before creating the related records.

Left Panel

The left panel contains buttons to jump to the different sections of the data entry form, and links to view and act on the different types of records related to the current record.

Page Sections

Because of the number of data entry fields available for most record types, the fields have been subdivided into sections. The data entry form provides buttons to jump to the first prompt in each section. Below is an example of the buttons for a Request record type.



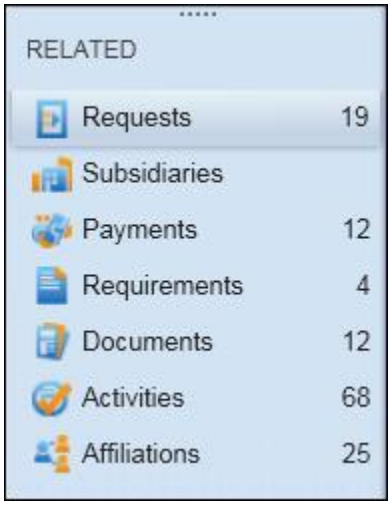
NOTE: With the optional Customizer Module, the client can add sections and fields to this form. Clients are not limited to the number of sections that they can create.

When you click on one of these links, the data entry section of the form will scroll to display the section header at the top and position the cursor in the first field of that section. If the section was collapsed before the user clicked the link, the section will expand automatically.

Conversely, whenever you click or **Tab** to a field in the data entry form, the button that represents that section will be highlighted.

Related Records Links

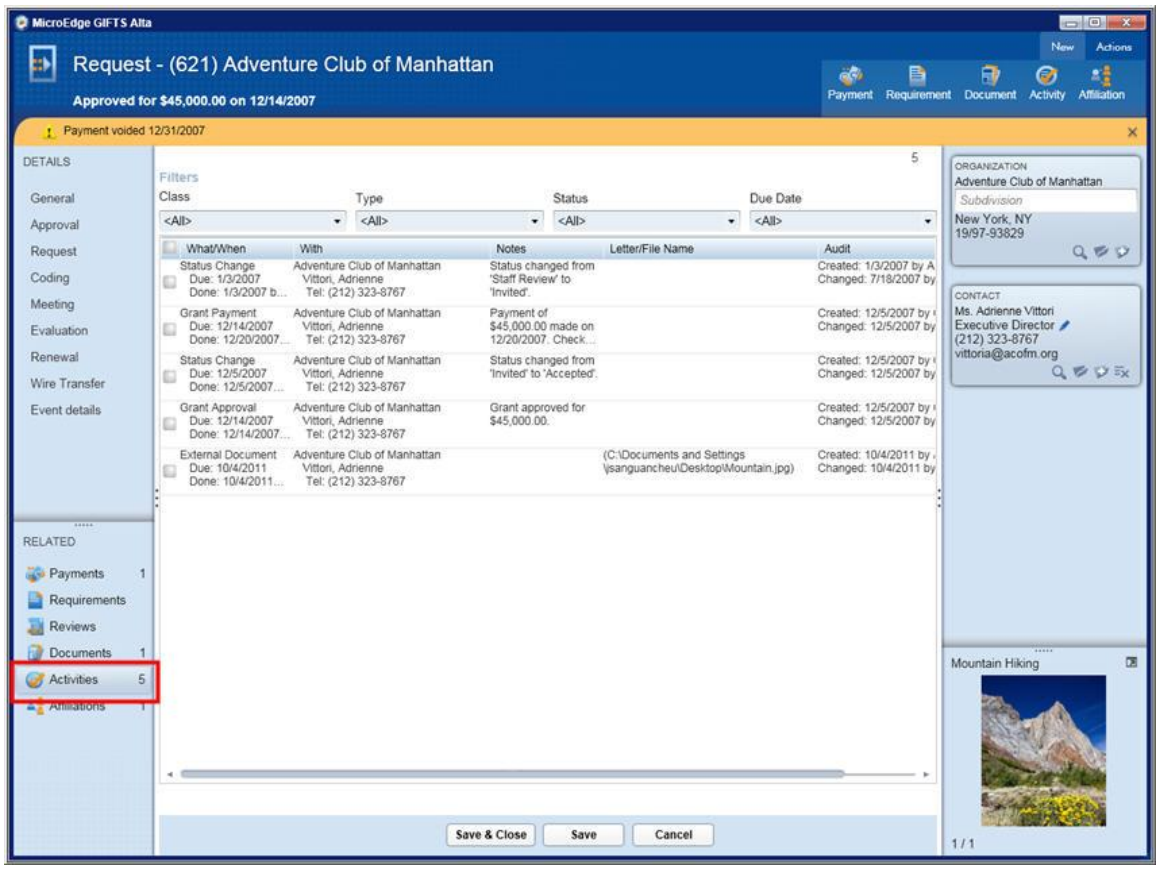
Related records are other records in the system with which the current record has a one to many relationship. Below is an example of the related links for an Organization.



Each record type will be displayed with a count of the associated records. Note that the record type will display even if there are no associated records.

Clicking one of the Related links buttons will take you to a list of the related records displayed within the edit form.

Below is an example of the related Activities for a Request.



If there are many related records, some of the record type grids offer **Filters** on top narrow down the list. You can view the information in the grid, take action on specific records, and/or open the data entry form for one or more of the related records.

Selecting Records

Simply clicking on a row highlights it but does not select it. Records can be selected or deselected by clicking on the checkbox in the checkbox column. **Ctrl**+click can be used to select individual rows, by clicking anywhere in the row, and likewise **Shift**+click can be used to select contiguous records. The checkbox in the header column is used to select or deselect all records.

NOTE: When you are viewing any of the Related records lists, once a record or records is selected, the ribbon toolbar provides the actions that are available on those records, not the current record.

Double-clicking on a record in the grid opens up the edit form for that record.

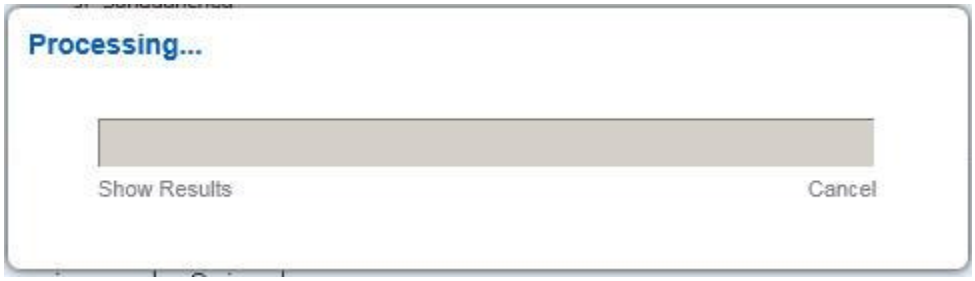
Action > Open: When you are viewing a list of related records through an edit form and select one or more, the Actions menu will include an Open option. This will open the selected record(s) as a set. The first record in the grid will be presented to the user initially. The user will be able to use the **Back** and **Next** buttons on the edit form to switch between the records without having to close the edit form in between.

NOTE: If you have made changes to the current record, you will be prompted to save them if you click **Back** or **Next**.

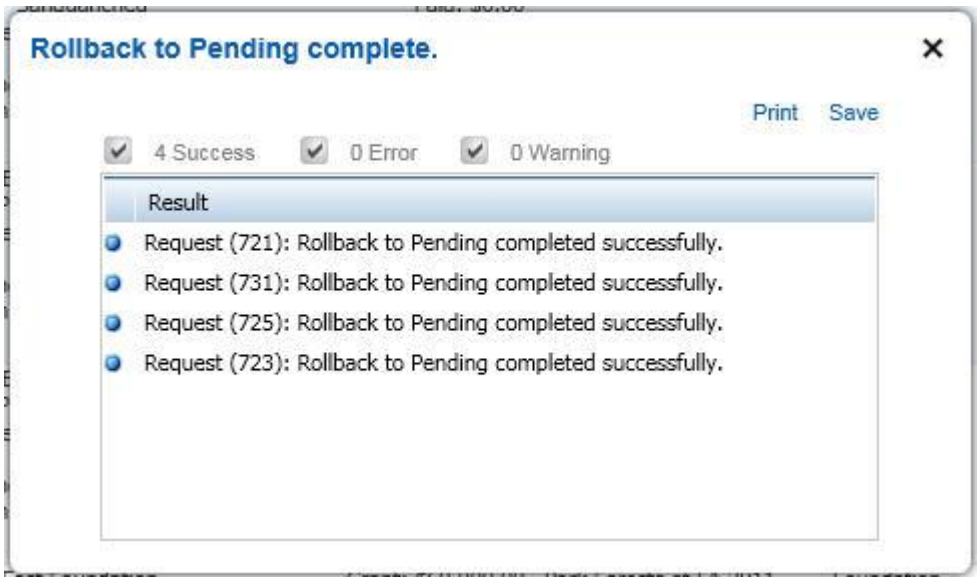
Batch Processes

Batch processes are actions that can be performed on more than one record. They are available from both the Related Records grids, and from the Workspace.

In Alta, a window with a "Processing" bar will display indicating the progress of the action. This window includes a **Cancel** button. If you click **Cancel** before the process is complete, the remaining records will remain unprocessed, the summary will display indicating the counts for the records processed so far.



The Alta process monitor displays the record type and ID of each record, followed by a message in the log. The process monitor will have **Print** and **Save** options.

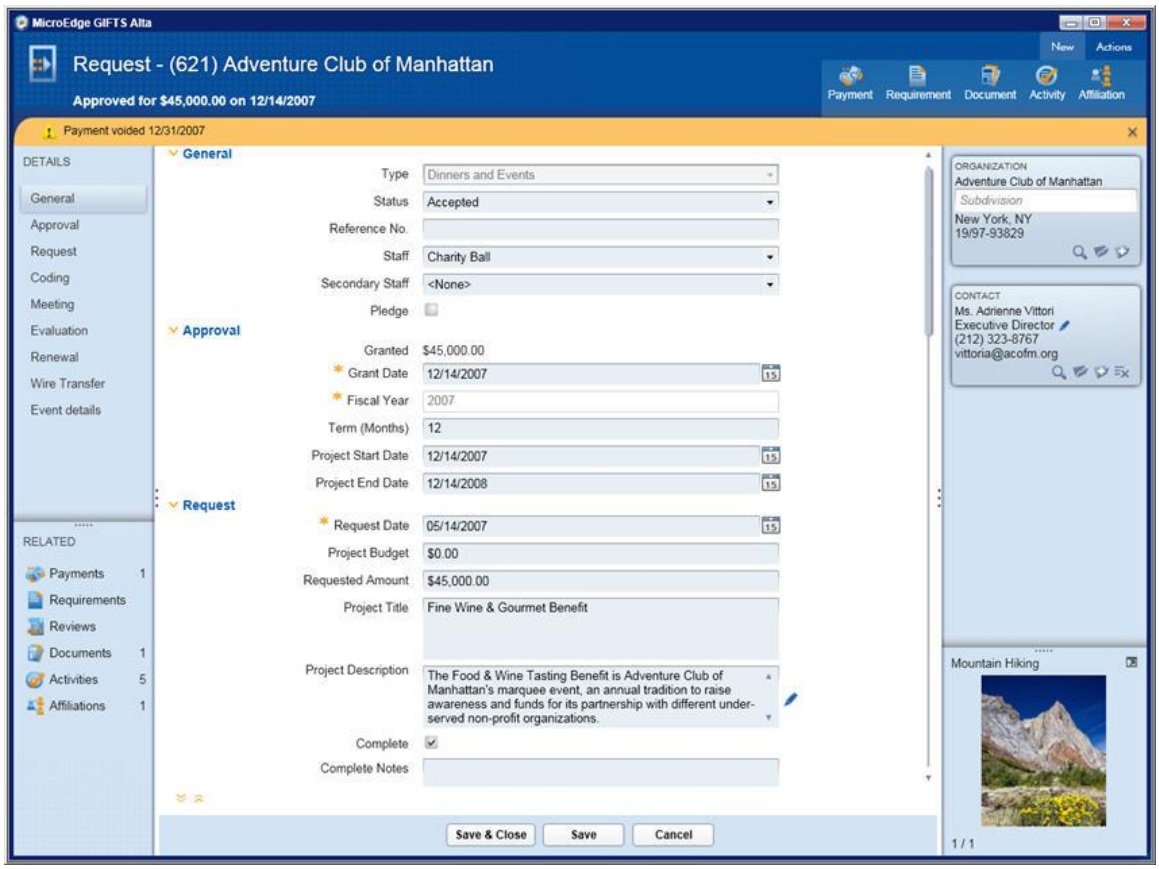


Branch Security

If branch security is enabled, the Related Records are filtered to show only those records to which the current user has either update or read-only access. If the user has view-only access – users cannot see Pending and Declined Requests from the other branches.

Data Entry Area

The center area of the Edit Form displays the data entry fields for the record.



Sections

Clicking the **Detail** buttons on the left panel will allow you to jump to the first field of each section on the edit form.

You can also scroll down or **Tab** through the fields. A scroll bar will also be available to the right.

A section header will indicate the start of each section and each section can be collapsed or expanded using the small orange arrow next to the header. These settings will be remembered. All sections are expanded by default.

Required Fields

Fields with a star icon to the left are required before the record can be saved.

Spell Check

Selected fields will have automatic spell check enabled. This option can be disabled/enabled through the User Menu Preferences.

The Coding Section

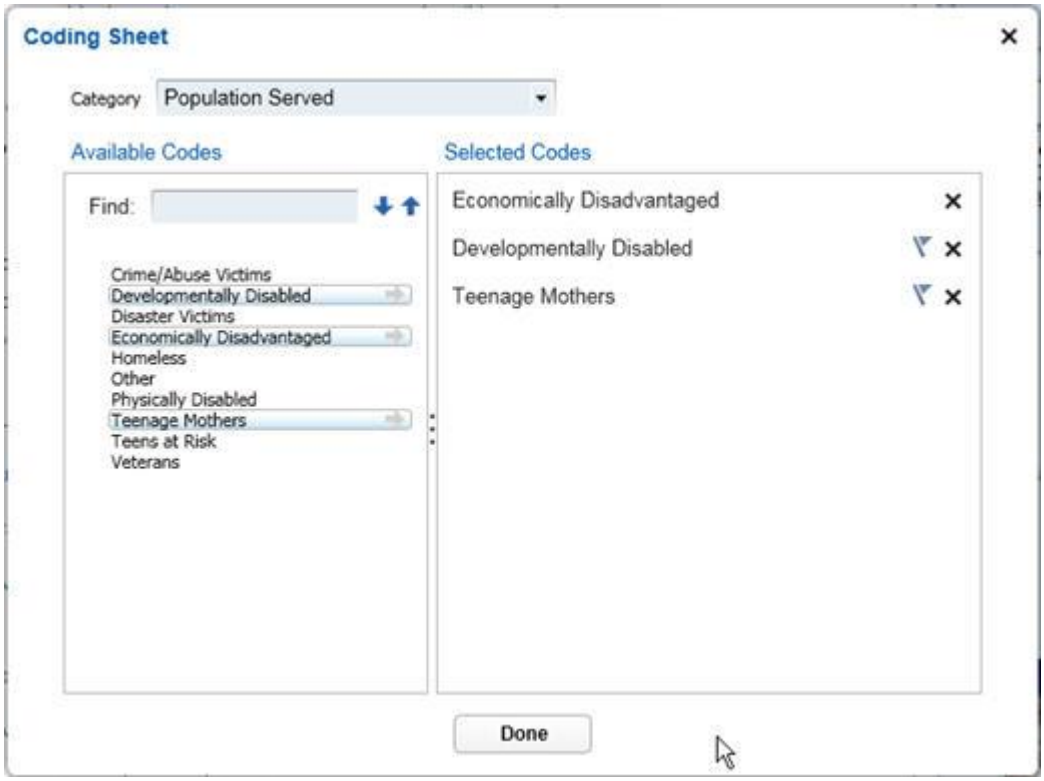
Available only on the Organization, Request, and Contact forms, the coding section does not contain ordinary data entry prompts. Instead, users are asked to select values from any number of client-defined “code tables”.

Categories that allow only a single value and have a single level will be represented by a standard drop-down.

Primary values are distinguished from secondary values. A button will be listed next to any non-primary value to change it to the Primary value.

The user has the option of removing any individual value by clicking the ‘X’.

Categories that allow more than one selection will initially only show the Category name as a link. Clicking this link opens the Coding Sheet selection window.



- If there are multiple levels, orange collapse/expand arrows will be available in the list.
- A Find field is a available to help you find the desired value.
- Double-clicking a value adds it to the list.
- Once multiple values are selected, they will be listed on the right side.
- The **Flag** icon makes the value the primary, while the **X** deletes the value.
- If you try to select more values than is allowed, a message will prompt you.
- The Done button simply closes the popup. Be sure to use the **Save** button on the Edit Form.

Right Panel

The right panel on an Edit Form displays the 1 to 1 relationships with the current record along with any images associated with the record.

Resize Bar

A resize bar is available on the left side of the right panel. Dragging this bar left or right will resize the panel to suit your needs.

Primary Relationship Cards

Primary relationships are any of the major record types with which the current record has a 1:1 relationship.

For instance, a Request is associated with a single Organization and a single Primary Contact. Both of these are considered primary relationships.

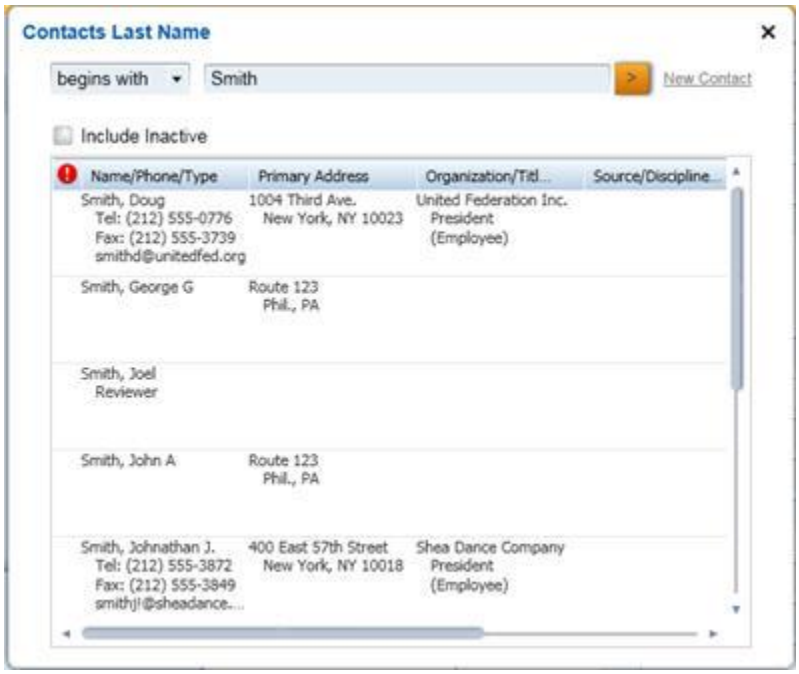
The following options are available on each card depending on the record type:

Option	Description
Search	Brings up the Record Lookup to allow the user to search for and select a specific record. Hidden if the record is locked.
Open	Opens the edit form for the associated record. Note that the edit form for the original record remains open but is inaccessible until you complete or abandon the creation of the associated record. Hidden if no record is associated.
New	Brings up the edit form for a new record of the relevant record type. Note that the edit form for the original record remains open but is inaccessible until you complete or abandon the creation of the associated record. Hidden if the record is locked.
Remove	Removes the association. The Remove icon will only appear if a record is already associated. Hidden if no record is associated.

NOTE: If you are creating a new record and a primary relationship is required but not yet defined, a red bar will appear on the side of the card. You must use the Search or New options on the card to define the relationship.

Record Lookup

When you wish to associate the record you're editing with an existing record in the database, click the **Search** button on the related record card. The Record Lookup will display.



Simply select the search operator, enter the required text, and click the orange arrow or **Tab** out to begin the search.

Results will be listed below. Select any record by double-clicking it.

Once a search is done, if the record you are seeking does not exist, you can use the **New [Record Type]** link next to the orange arrow.

NOTE: Branch security settings may limit the search results.

Search for Duplicates

Preferences can be set in the Administrator module to automatically search for duplicates when entering a new Organization or Contact. This process uses the same form layout as the Record Lookup, described above.

Images

Image documents that are associated with the current record will be displayed in the lower right panel.

- Images will be scaled to fit the space provided.
- The title entered when the Document was uploaded will appear as a caption above the image.
- There is an icon in the upper right corner that allows you to View Full-Size Image.
- If more than one image is available, the user will have the option of scrolling through the images using back and next icon buttons.
- If there are no images to display, the Images section will be hidden.

The Footer Bar

The footer at the bottom of the form provides the general command buttons for the form.

The following are available.

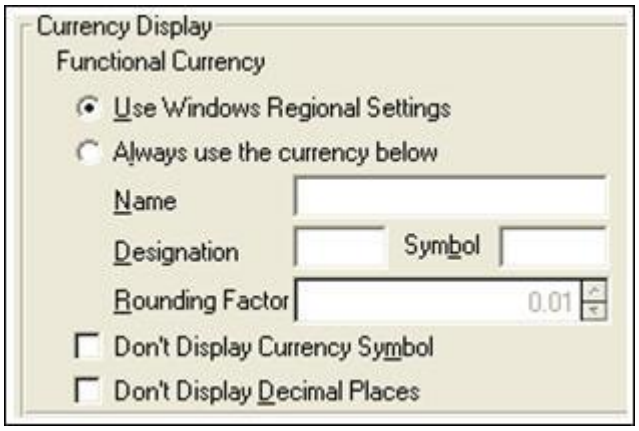
- Back
- Next
- Save & Close
- Save
- Cancel

The **Back and Next** buttons display when one or more records have been opened from a grid. These buttons allow you to move back and forth through the different records in the set without closing and re-opening the form.

Currency Preferences

By default, GIFTS Alta employs Windows regional setting for currency display options. This option effects the display of currency fields by using the format and symbol of the currency implied by the user's Windows Regional Setting.

For clients that have offices in multiple countries, the General Preferences form in the Administrator module allows the user to override the Windows Regional Setting currency with a particular currency symbol of their choosing, so that all sites can see the amounts in the same currency.



If "Always use currency below" is selected, the Name, Designator, and Symbol should become active fields. (Ignore Rounding Factor, which is only applicable to the Multicurrency feature.)

On the Edit Form in GIFTS Alta, the options for Symbol, and whether or not to include Symbol and Decimal Places should be respected. (Name and Designation are not applicable to the edit forms.)

Record Locking

System record locking will be in place for all of the edit forms in GIFTS Alta.

NOTE: In GIFTS 6.x, only some record types supported record locking.

From a user perspective, when you try to open an edit form, you will either get access to the record and lock it from other users or you will fail to get a lock and will get the following message:

You are allowed to **Try Again** to gain the lock (presumably after telling the other person to close the record), **Ignore** (which will allow you to see the edit form but with everything disabled) or **Cancel**.

In batch processes, the record will be skipped if the system cannot lock it. The process log will use the same message as shown above.

Searching for Data in GIFTS

GIFTS Alta 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 help topic describes how to use the search options and view your grant making data.

Overview of the Search Options

About Building Search Expressions

Property Types Reference

Using the Query Builder

Building an Advanced Search

Using Saved Searches

Refining the Search

Overview of the Search Options

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 you to basic search terminology and advanced search techniques which can be implemented in GIFTS.

Quick Find

Query Builder

Advanced Search

Wildcard Characters

Searching for Missing Data

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 to this is when you select the Contacts type, 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.

The Quick Find is available on all three work areas of GIFTS Alta: Dashboard, Workspace, and Reports. It will search differently for each record type, concentrating on the most pertinent information for each.

Query Builder Search

To access the Query Builder, click the **Full search** link in the header.

Some queries are too complex to run with Quick Find. You can build them with the Query Builder Search feature, or create part of the query using Quick Find and then edit the filters with the Query Builder.

The Query Builder 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.

An example of a Query Builder search is available for your reference.

Advanced Search

To access the Advanced search form, click **Full search**, go to the **Query Builder**, and click the **Advanced** link on the bottom.

The Advanced search option requires an understanding of query coding in order to build complex queries for large databases.

An example of an Advanced Search build is available for your reference.

Wildcard Characters

Both the Quick Find and Query Builder 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 uses the percentage sign (%) instead of the asterisk (*) as the wildcard character.

Searching for Missing Data

In the Query Builder 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.

About Building Search Expressions

You may find that you'd like to run searches that are not available in the standard Saved Searches Library.

This can occur when:

- Search cannot access the property (database field) you want.

- You need to join expressions in a way that is not supported by the new Quick Find.

You can combine searches 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 Full Search feature, but is helpful for building sophisticated Queries 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 Query Builder'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 a Search Expression

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

- Property

  This is the characteristic that you are using to limit your search results. For example, the Query Builder for Requests uses the **Grant Amount**, **Disposition**, and **DocketNumber** properties. 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

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.'

The Query Builder automatically joins expressions with AND. Depending on your intentions, you can join expressions with AND or OR using the Advanced Search option.

Collectively, the expressions you use are known as the search criteria.

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.

Query Builder automatically joins and compounds expressions based on the typical needs of searches; all Query Builder 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.

Advanced Search

Unlike the Query Builder 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.

For complex searches where Query Builder 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.

Property Types Reference

When you select a filter in Query Builder, you are creating an expression based on that filter's property type. 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 filter you've chosen.

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

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.
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 Query Builder. This allows you to find multiple records more quickly. You must separate each ID using a comma.

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 Query Builder—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 Query Builder 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 Query Builder window. When you click on a one-touch expression, it is automatically built and displayed in the Query Builder form. Some examples are: "Request is Incomplete," "Activity is Overdue," and "Tax Status Requires Verification."

Using the Query Builder

The Query Builder 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.'

This section describes how to create a Query Builder search.

Creating a Query Builder Search

The following procedure demonstrates the Query Builder search by describing how to find Approved Requests in the Program Areas of Dance or Music:

1. Click Full search to open the Search window.
2. Click Query Builder on the left if not already selected.
3. Select the Record Type required from the list on the left. In this case, we are searching for Requests.
4. The Query Builder form for Requests is displayed.

   Note: If there are search expressions in the Query Builder form, delete them.

5. Click the More filter options link in the upper right corner to open the Filter Options form.
6. As we need Approved requests, check the box for **Disposition**.
7. For Program Area, you will need to click the **Coding Sheet** link to open the Coding Sheet Filter Options form.
8. Check the box for **Program Area** and click **Done** to return to the main filter options form.
9. Click **Done** again to return to the Query Builder.
10. Complete the **Disposition** 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."
11. Specify the **Program Area** for either Dance or Music by clicking Program Area in the Query Builder.
12. On the Coding Sheet form, specify the classification codes you are searching for:
    - Expand the lists as necessary and double-click on **Dance** and **Music** to add them to the Selected Codes list.
    - Click **Done**.
13. You are returned to Query Builder, and your search expressions are displayed.

    Note: If you click **Advanced** to see the search coding, you will notice that the Program Area expression automatically uses the conjunction OR between Dance and Music because they are part of the same filter. Also, note that GIFTS will automatically insert the conjunction AND between the Disposition and Program Area expressions in order to join them.

```
[Requests.Disposition] = 'Approved' AND ([Codes_4.Level3_ID] = 5037 OR [Codes_4.Level3_ID] = 5180)
```

14. Click **Search** to initiate the search. If there are records that match your search criteria, they are displayed in the Workspace. If no records matched your search criteria, you are given the option to refine your search.

Building an Advanced Search

This section demonstrates how to build an Advanced Search by using an example.

To build this search:

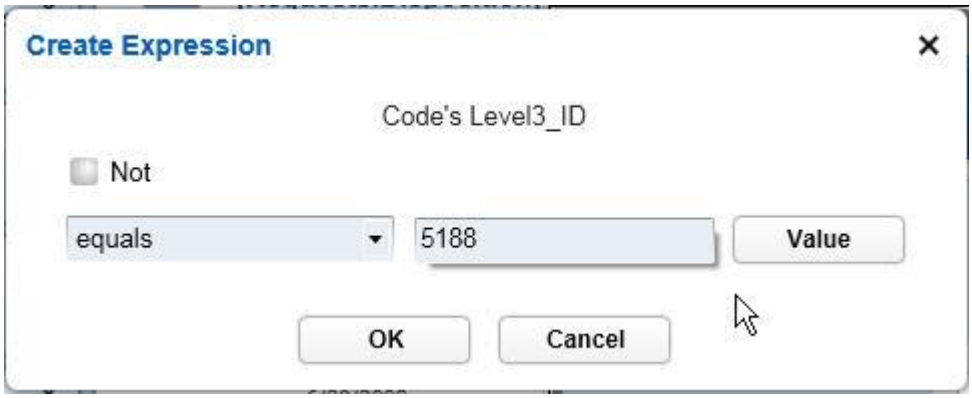
1. Using the Query Builder for the Requests type, create the first expression, which specifies an *Approval Date on or after January 1, 2011.*
2. Click **Advanced** to switch to the Advanced Search. The expression you entered with the Query Builder search is displayed. Note that in the Advanced Search, the database syntax is displayed instead of the "plain English" syntax used by Query Builder.
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.

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

5. For this example, highlight the **Codes** and **Level3_ID** fields and click **Insert Expression**.
6. The Create Expression popup will display.



7. Here you have the option to add 'Not' to the expression by checking the box.

8. Select a condition from the list and then type in *5188* for the value or click **Value** to select it from the list.

   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**, **ContactPrefix**, and **ContactSuffix** 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.

9. After entering the data, click **OK**. The syntax for Expression 2 is displayed
10. Enter a third expression on your own using the steps above.
11. Enter the remaining parentheses, conjunctions, and expressions to complete the search.
12. Click **Search** to initiate the search. If no records match your search criteria, the Workspace will be displayed with a *No records found* message.

Refining an Advanced Search

If your search did not result in the information you need, you can return to the Advanced Search form and edit the syntax of the search.

To edit an Advanced Search:

1. Click the **Refine Search** icon. The search syntax is displayed in the Query Builder - Advanced Search form.
2. You can now manually edit the search syntax.

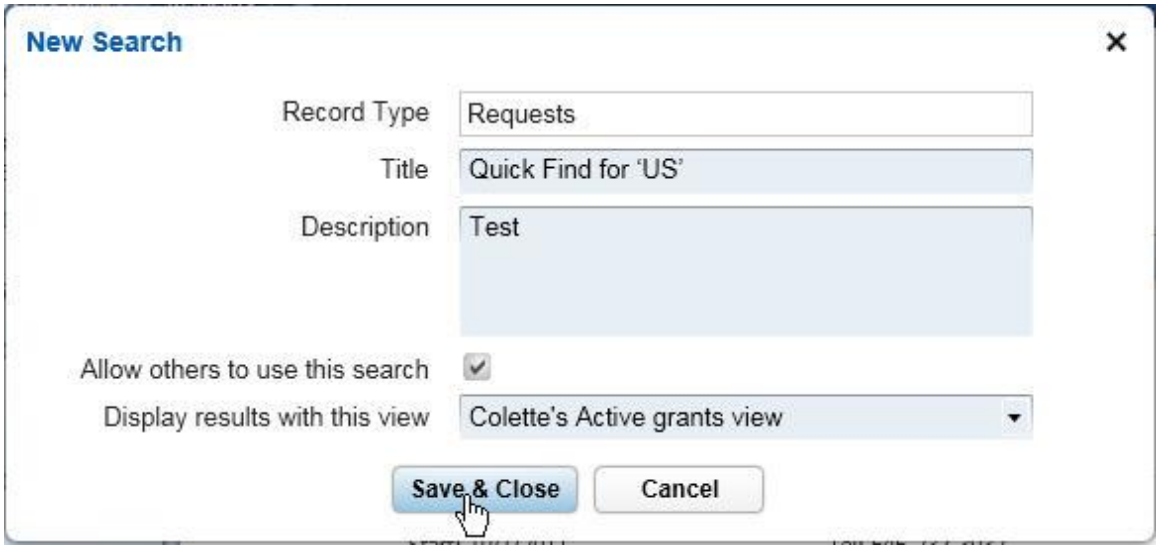
Using Saved Searches

GIFTS Alta allows you to save your search queries for use at any time. 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.

Saving a Search

To save a Search in the Workspace:

1. Create, refine, and run the search. The search results are displayed in the Workspace .
2. In the Workspace, click the **Save Search** icon to open the New Search form.



3. Enter a **Title** for the Search, then edit the **Description** if you wish.

   Note: 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 Saved Search.

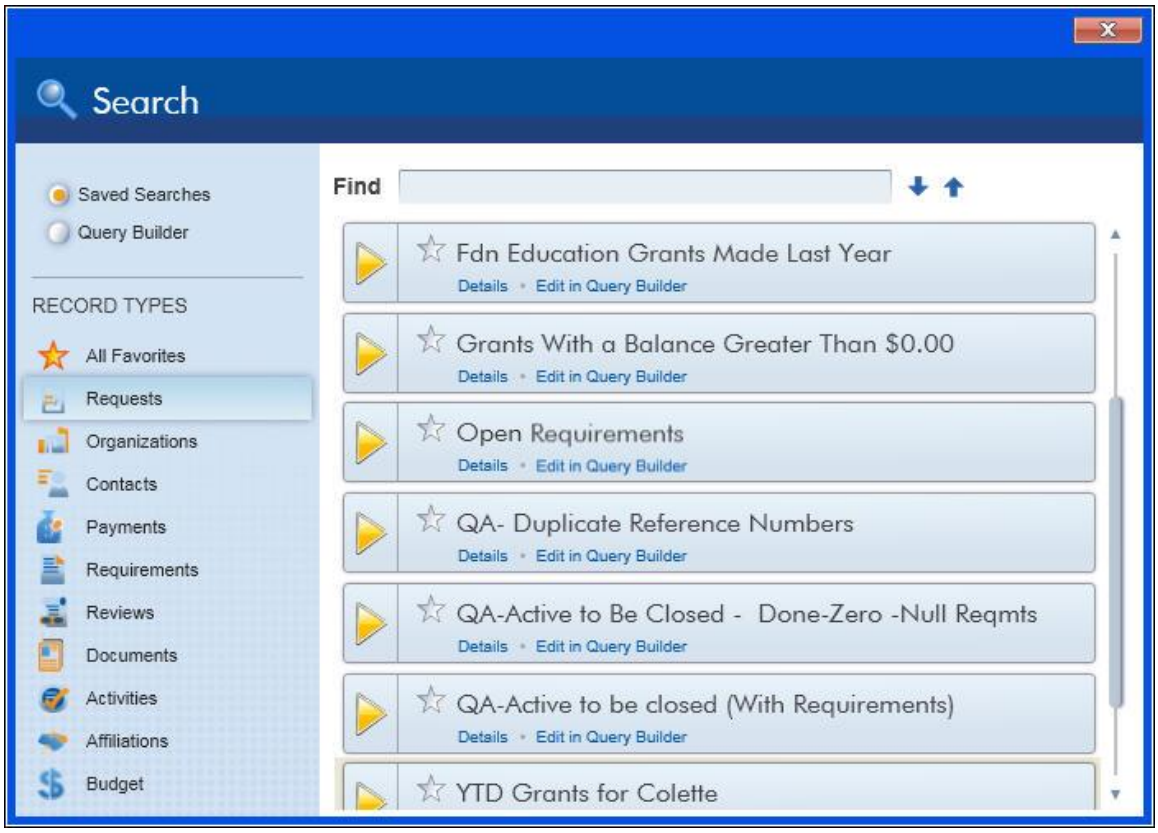
4. If you want other users to be able to use this saved search, check the **Allow others to use this search** box.
5. If you want to associate a View with the Search, select the view from the **Display results with this view** drop-down menu. When the saved Search is run, the results are displayed using the column selection, column formatting, and sort order of the View.
6. Click **Save & Close**. The search is saved. The Search will be available through the **Full Search** link.

Running a Saved Search

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

1. Click **Full Search** and select **Saved Searches** on the left.

2. The available saved searches are displayed.



2. Choose a Search from the list and click the yellow **Run Saved Search** arrow button.

Working with Your Favorite Searches

A **Favorites** option is available in the **Search** window's Record Types list. Selecting this displays all Saved Searches you have marked as a Favorite.

To add a saved search to your list of favorites:

1. Click **Full search** to open the Search window.
2. If Query Builder is selected, click **Saved Searches** on the left.
3. Locate the search, and click the **Star** icon next to it's name. The star will turn **yellow**.

To remove a saved Search from your Favorites:

1. Click **Full search** to open the Search window.
2. If Query Builder is selected, click **Saved Searches** on the left.
3. Locate the search in your Favorites list and click the **Star** again to remove it from Favorites.
4. A confirmation prompt will popup. Click **Yes** to confirm and the search will be removed from the list.

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. Click the **Full search** link to open the Search window.
2. If Query Builder is selected, click **Saved Searches** on the left.
3. Locate the search you want to work with in either the **Favorites** or the **Saved Searches** list.

- Click **Details** to expand the Search details to see Description, Last Updated, Availability and View information. Click **Edit** to change the Search's Title, Description, public or private setting, to make it available for In Progress and Submitted Reviews page parts in ReviewerCONNECT, and to add or remove an associated View.
- Click **Edit in Query Builder** to open the search in Query Builder mode. When you are finished editing the search, you are returned to the list of saved searches.
    - **More filter options** for additional filters.
    - **Reset** will clear all filters and set them to the defaults for the record type.
    - **Update** to save your changes.
    - **Save As** to save a copy of the current search with a new name .
    - **Advanced** to open the Advanced search form.
    - **Search** to immediately run the search without saving.
- Click **Save As** to save a copy of the search with a different name choose . This option is useful if you wish to create a new search based on an existing saved search.
- Click **Delete** To delete a search. You are prompted to confirm that you want to delete the search.

Refining the Search

If your initial 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 modify a search expression to broaden your search.

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

- Add or Modify Search Filters
- Delete an Search Filters
- Working with Your Last Search Query
- Searching for Missing Data
- Copying the Syntax of a Search

To Add or Modify Search Filters

1. Perform the Quick Find search and then click the **Refine Search** magnifying glass icon to open the Search form in Query Builder mode.
2. To ADD new filters, click the **More filter options** link and select from the available filters. Click **Done** to return to the Search form.
3. To MODIFY the filters, use the drop down menus on the existing filters to select a new Condition and modify the keyword in the text fields as needed.
4. Set the search criteria for your new filter as needed and click **Search** to run the revised query and return to the Workspace.

The results are displayed in the Workspace or, if there are no matching records, you are given the option to refine your search.

To Delete an Search Filters

1. Use the Refine Search icon to open the Search form in Query Builder mode.
2. To delete an existing filter, simply click the **X** on the upper left corner.
3. Click **Search** to return to the Workspace and rerun the search.

Working with Your Last Search Query

If you wish to run or edit your last search:

1. On the Workspace, click the Refine Search icon to open the Search form.
2. Click the **Last Search** link on the bottom of the Search form and then click **Search**.

TIP: You can also run the last search from the Search History list on the Workspace.

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 Condition value when you Refine Search.

Copying 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 Workspace, 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 get a copy of the syntax for MicroEdge Technical Support, click

Advanced on the Search form and copy the full search query in the upper blue field to your email.

Working with Reports

One of the most important functions of any database system is the ability to arrange and present the data you have entered in useful ways. GIFTS Alta includes an extensive library of standard reports.

The GIFTS Reports Library

There are two types of reports available in Reports Library:

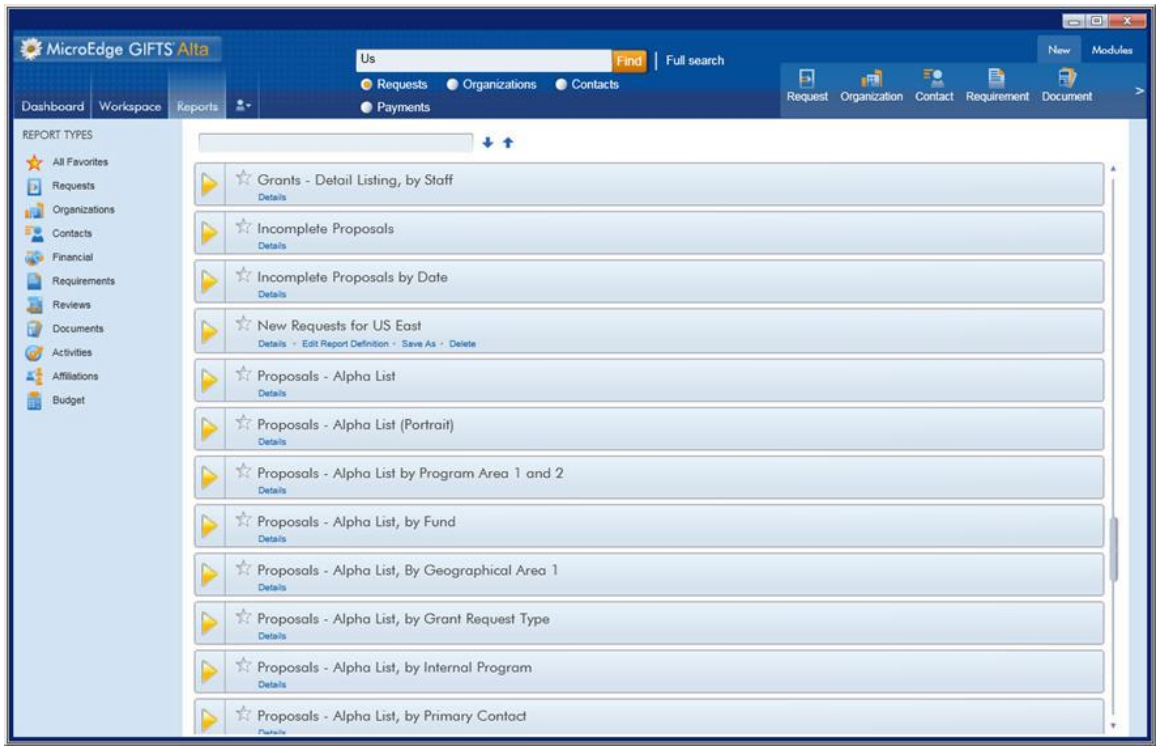
Standard Reports—More than 200 pre-built standard reports designed to meet the needs of most grant making organizations are installed with your system. These reports have been designed to complement the functionality of GIFTS in a way that is beneficial to the largest number of users. Standard reports answer common queries, some of which are general in nature and some of which are more specific.

Example: The “Alphabetical List of Grants” report lists grants in alphabetical order to answer the query “Which projects have we funded?”

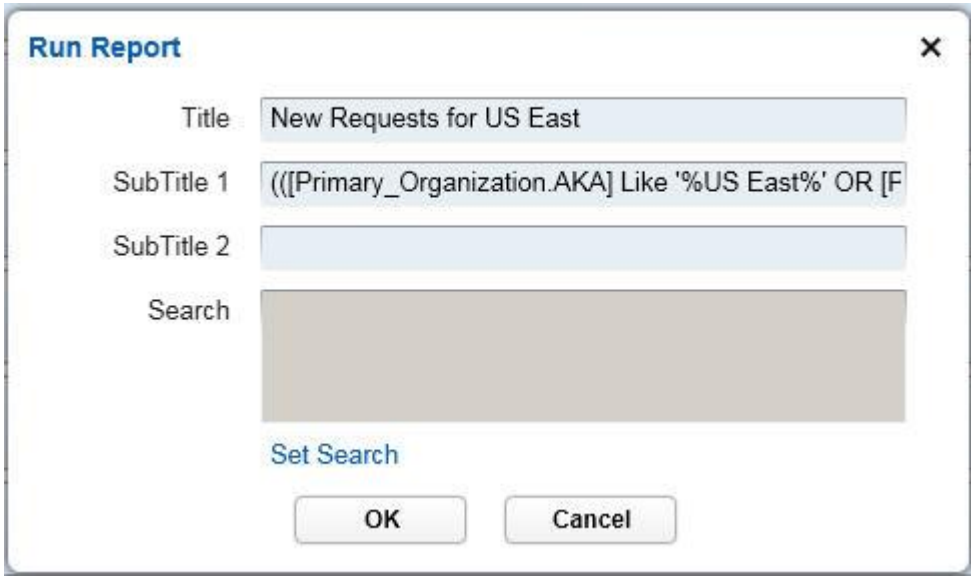
When you run this report, you can further define it to answer a more specific query, such as “Which projects have we funded in Arts and Culture?” You can choose the specific data you wish to see for all reports.

Saved Workspace Reports—Saved Workspace reports are ad hoc reports designed by individual users, with a large degree of control over formatting and layout. As with saved views and searches, saved Workspace reports may be either public or private. For details on creating and saving Workspace reports, you should refer to Reporting from the Workspace.

1. Simply click on the **Reports** toggle button under the GIFTS Alta logo to access the full library.



1. Select a **Report Type** or **All Favorites**.
2. Locate the report you desire and click the yellow **Run Report** button to run it.
3. A Run Report form will popup to confirm.



You modify any of the following before running the report:

- **Title** - Give your report a custom name.
- **Sub Title 1** - Defaults to the search criteria.
- **Sub Title 2** - Add more details regarding the report here.
- **Search** - Here you can specify additional search criteria.

Reporting from the Workspace

The GIFTS Workspace 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 Workspace, or you can use the advanced reporting features built into the system to create the custom look you want.

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

Once you have a report set up, you can add it to your Report Library as a saved Workspace report so you can quickly run updated versions in the future.

Workspace Report Types

Setting Up and Running Ad Hoc Reports

Setting the Print Options

Changing a Report's Type

Running Reports

The Active Reports Viewer

Saving an Ad Hoc Report

Modifying a Saved Workspace Report

Deleting a Saved Workspace Report

Workspace Report Types

When you create an ad hoc report from the Workspace, 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 Workspace 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).

You can change a report's type after it is saved; note, however, that data in the report may be lost or altered.

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 Workspace. Where applicable, the steps refer to the sections in this help file that provide more detailed information.

STEP 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.

STEP 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 Workspace, go to **Options > Report** to configure the print options described in Setting the Print Options.

STEP 3 Print, Preview, and Save the Report

From the **Print Request** form, choose **File > Print Report** or **File > Preview 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 Workspace report.

Setting the Print Options

Once you have the appropriate records selected in the Workspace, you are ready to set up your ad hoc report. To set the print options, from the Workspace go to **Options > Report**. The **Print Requests** form opens.

TIP: Your administrator may have set up formatting defaults for your ad hoc reports, which will be reflected on the **Print Request** 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 Workspace reports—Detail, Summary, and Top *N*—are described in Workspace Report Types. When you change report type, tab order and available options may change as well. The following information about **Print Request** 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.) In case you need to revert to the original report type, you should save a copy of the report before changing its type.

Saved Workspace 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 Workspace report saved to your GIFT Report Library. Click any of the **Print Option** tabs listed below to get details on its content:

Report Options Tab

Columns Tab

Sorting and/or Grouping Tabs

Page Setup Tab

Design Tab

After you finish setting the print options, you can run the report.

Report Options Tab

On the **Report Options** tab of Workspace report print options, you will set up a number of general options for the report. The following options are available for all reports:

- 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).
- 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: Note: This option is not available for Summary reports.

- Print Range

  Note: Note: Print Range appears only when you are creating a new ad hoc report in the GIFTS Workspace.

  Use the option buttons in this frame to indicate whether the report should include all records in the Workspace, or only those that are highlighted.

NOTE: The next two options appear only when you working with an Workspace 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.

Columns Tab

On the **Columns** tab of Workspace report print options, 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.

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 Workspace (please see Working with the Workspace Columns for details).

The options that available may change, depending on the type of data the selected column displays. In addition to the standard options, there are different formatting options available for:

- Dates
- Currency columns
- Coding Sheet columns
- Number columns
- Elements within a combined column
- Calculated columns

Standard Options

The following options are available for all columns. They appear on the left side of the **Formatting** section:

- 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:

- 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:

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: 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.

Number Column Options

If the column you are working with contains numerical values, the following additional options are available:

- Decimal Places

  Use this drop-down to indicate the number of decimal places to display, from 0–4.

  Note: 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 Organization record type). 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** section below the formatting options:

Other buttons on the toolbar allow you to select a saved search, or to clear the search criteria completely.

Sorting / Grouping Tab

This tab of the Workspace report print options 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.

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:

IMPORTANT: These sort options appear for all three types of reports—Detail, Summary, and Top *N*.

- 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).

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:

- 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

- 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.

- 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

- 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.

- 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.

- Display code/description

  Use this drop-down to determine whether the display should include the Code value, the Description value, or both.

Number Fields

- Decimal Places

Use this drop-down to indicate the number of decimal places to display, from 0 to 4.

Note: 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.)

Page Setup Tab

Use the options on the **Page Setup** tab of Workspace report print options 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:

- 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.

- 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:

- 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
- Footer Text
- Subtitle 1
- Report Date
- Subtitle 2
- Page Numbers

Design Tab

The **Design** tab of Workspace report print options 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.

Open the complete list.

- Column Headings
- Group 4 Subtotal Label[1,2]
- Footer Text
- Group 4 Subtotal[1,2]
- Grand Total Labels

- Group 5 Heading[1,2]
- Grand Total Record Counts
- Group 5 Subtotal Label[1,2]
- Grand Totals
- Group 5 Subtotal[1,2]
- Group 1 Heading[1,2]
- Page Numbers
- Group 1 Subtotal Label[1,2]
- Report Data
- Group 1 Subtotal[1,2]
- Report Date
- Group 2 Heading[1,2]
- Subtitle 1
- Group 2 Subtotal Label[1,2]
- Subtitle 2
- Group 2 Subtotal[1,2]
- Subtotal Label
- Group 3 Heading[1,2]
- Subtotals[3]
- Group 3 Subtotal Label[1,2]
- Title
- Group 3 Subtotal[1,2]
- Group 4 Heading[1,2]

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 lists the report sections available; click to see the text elements contained in each section.
    - 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)*
- 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.

990 Reporting Columns

To allow users to create 990 reports which meet changing IRS standards, five 990 related columns can 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.

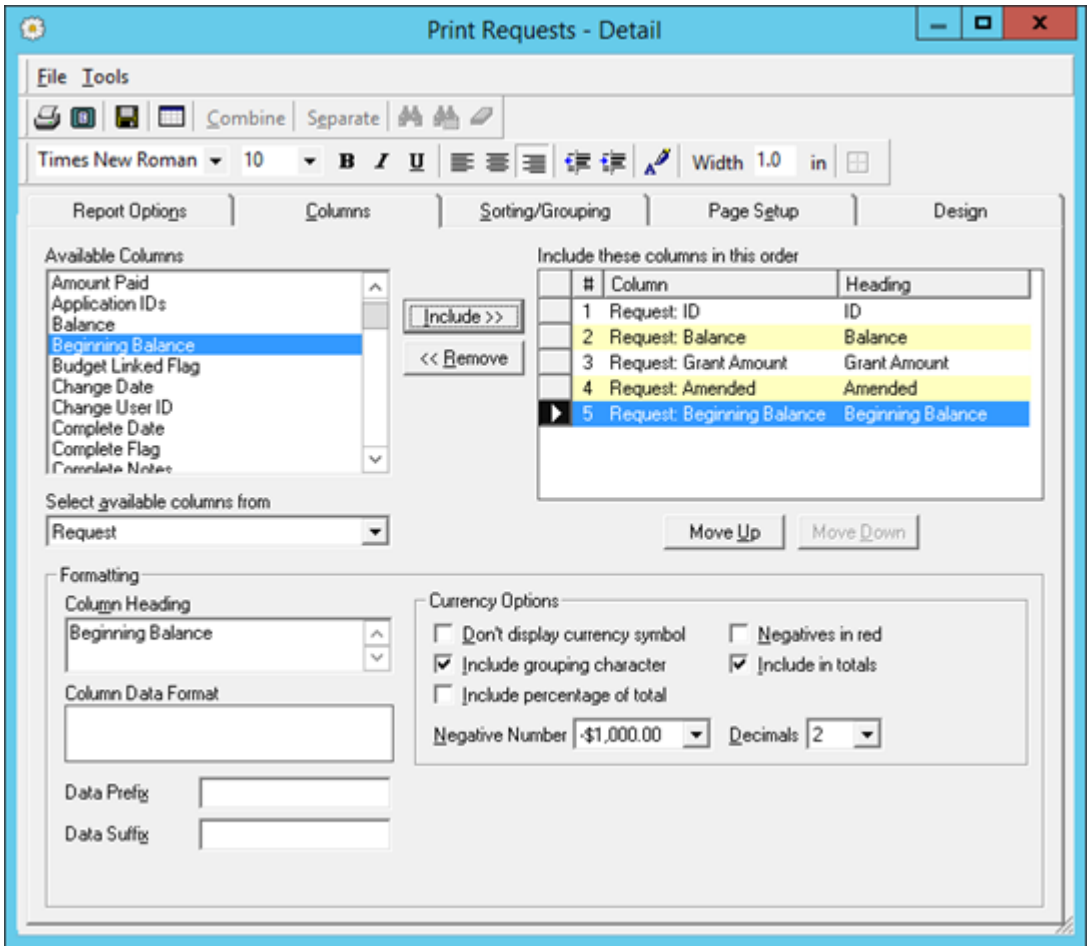
For Requests, the columns available include:

- 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.

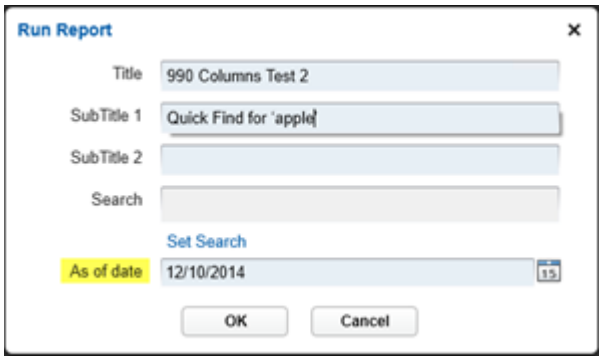
No search filters will allowed to be applied to these columns.

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 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.

Changing a Report's Type

The three types of Workspace reports—Detail, Summary, and Top *N*—are described in Workspace Report Types. 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. 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 Workspace reports in the Report Library, refer to Modifying a Saved Workspace Report.

The following sections describe issues you will encounter on the **Print Request** 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 record type will be removed. (E.g., if you are creating a report for Payments, 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.

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.

Running Reports From the Report Library

Reports saved in the Report Library may be run from the Reports work area. (Use the **Reports** button under the GIFTS Alta logo).

If you would like to run a report from the Report Library:

1. Go to the **Reports** work area.
2. Select a **Report Record Type** on the left panel
3. The available saved and standard reports will be listed.
4. Click the yellow **Run Report** arrow button to the left of the report to run it:

   - 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 Workspace report, the report will open in the Active Reports viewer.

The Active Reports Viewer

Whenever you preview a new ad hoc report or run a saved Workspace 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.

In the Active Reports Viewer, you can:

- View a table of contents for the report.
- Search within the report for text or other characters
- Copy selected pages from the report to paste into Word or other program
- View multiple report pages at once
- Print or export the report data

Viewing a Table of Contents

If your Workspace 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:

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

RTF

HTML

XLS

PDF

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 Workspace report.

Saved Workspace 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 Workspace 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.

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 Workspace 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. You can modify a saved Workspace report, but if the saved report is used by others, this may not be advisable.

Modifying a Saved Workspace Report

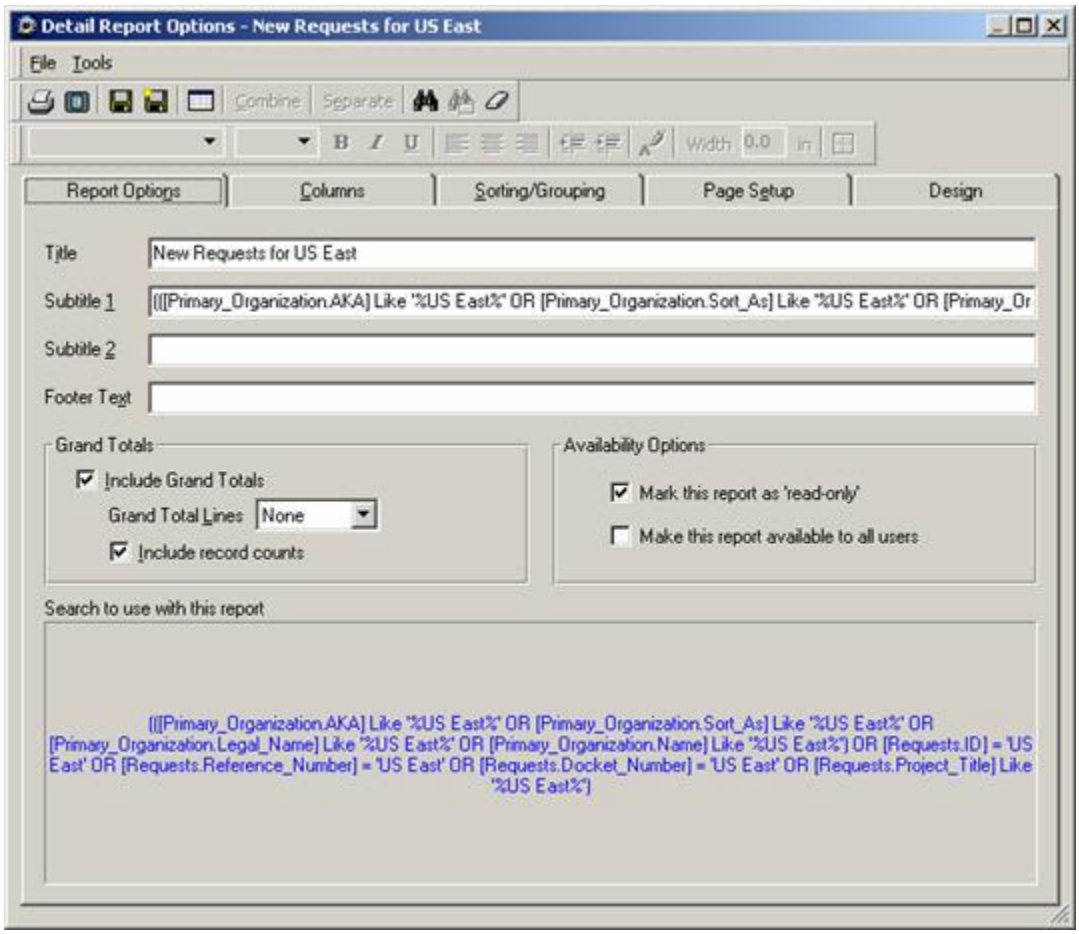
CAUTION: Changes made to *public* reports should be carefully considered, as they will affect all users in your GIFTS system.

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 Workspace reports that you have created.

To edit the properties of a saved Workspace report:

1. Click **Reports** under the GIFTS Alta logo. The Report Library opens.
2. Select the Report Type containing the report you want to edit, and then scroll down list to select the report.

3. Choose **Edit Report Definition** under the report name in the Report Library menu. The **Detail Report Options** form opens.



4. Use the options on the form to edit the properties of the report. Choose **File > Save Changes to Report Definition** to save your changes.

TIP: Your GIFTS administrator may not have granted you rights to modify public saved Workspace 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. Click **Reports** under the GIFTS Alta logo to open the Report Library.
2. Locate the report you want to modify in the GIFTS Report Library.
3. Under the report name select **Save As**. The **Report** window opens.
4. Give your report a new name, **Save and Close**, then modify it as detailed above needed.

Deleting a Saved Workspace Report

You can delete a saved Workspace 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 Workspace reports.
- You created and saved the Workspace report you are trying to delete. (You can always delete your own saved Workspace reports, regardless of your permissions.)

To delete a Workspace report from the GIFTS Report Library:

1. Click **Reports** under the GIFTS Alta logo to open the Report Library.
2. Locate the saved Workspace report you want to delete.
3. Click **Delete** under the report name
4. Click **Yes** to confirm the deletion of the report.

Working with Organizations

This chapter describes how to use GIFTS to maintain information about your grantee Organizations.

About Organization Records

Avoiding Duplicate Organizations

Searching for Organizations

About Organizations in the Workspace

The Organizations Edit Form

Adding and Modifying Organizations

Organization Affiliations

Organization Subsidiaries

Using Organization Alerts

Deleting an Organization

Researching an Organization

About Organization Records

An Organization record in GIFTS includes 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 section 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.
- 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 GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Organizations.

To access the Organization filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Organizations** Record type on the left.
4. Click the **More filter options** link in the lower right.

The following section details some of the more common search filters for Organizations:

- **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.

- **Customizer:** If you have the GIFTS Customizer installed, this filter will allow you to select from the custom fields available.
- **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.
- **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.)

About Organizations in the Workspace

When you do a search using Quick Find, Query Builder, a Saved Search, or the Related links, the Workspace provides a list of Organizations that met your search criteria.

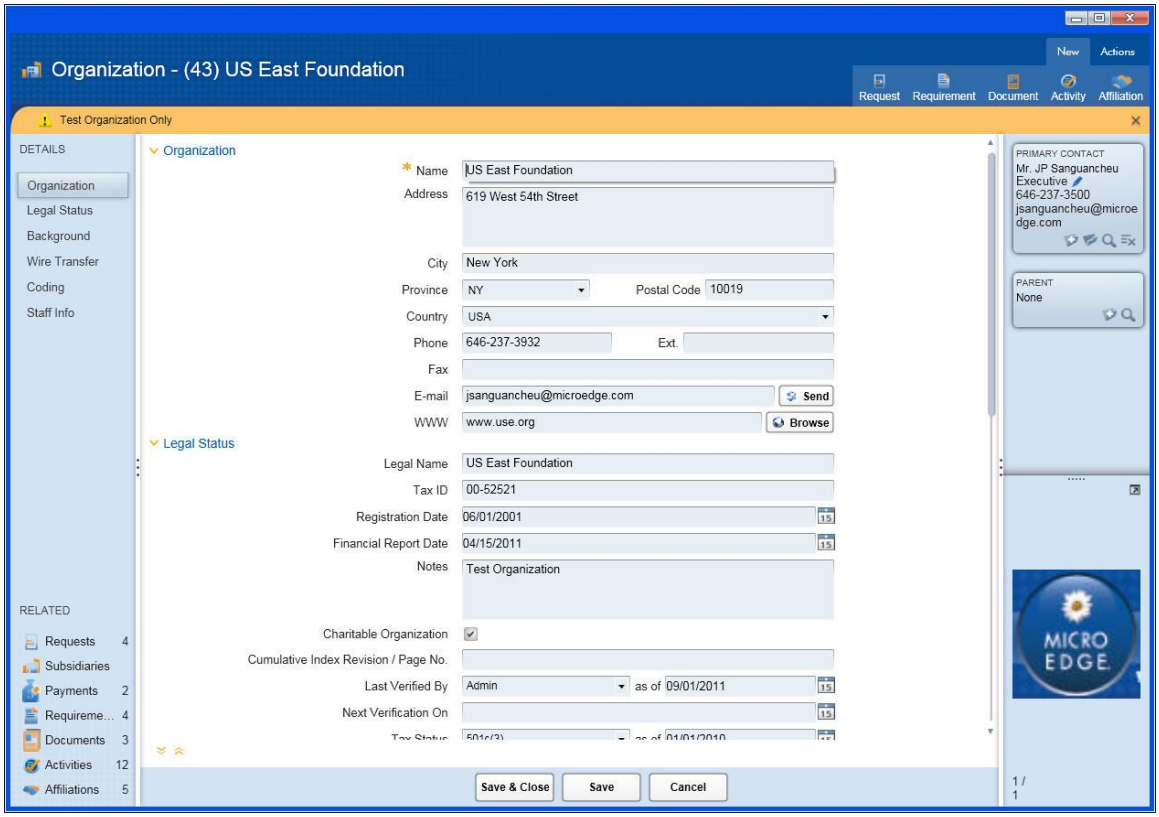
You can customize the format, sort order, and content of the information in the Workspace, as described in here.

By default, the following information is displayed in the Workspace for Organizations:

- **Alert Status:** A red exclamation mark is displayed if an alert has been posted for the Organization. You can place your mouse cursor over the icon to get a tooltip type popup displaying the alert message.
- **Organization:** Displays the Name and Address of the Organization.
- **Tax ID:** Displays the Tax ID number of the Organization, if available.
- **Background:** Displays any background history data entered for the organization.
- **Organization Type:** Displays the Organization type selected in the Coding section of the record.
- **Tax Statuses and Dates:** Displays the organization's tax status and last verification date. Up to 5 can be set for each organization.

The Organizations Edit Form

The **Organizations** Edit Form displays information after you have successfully searched for an Organization and double-clicked on the listed record on the search results page in the Workspace.



NOTE: If there is an alert set on the Organization, it will be displayed in an orange bar on top of the page below the header.

By default, the following Detail categories are available on the Organization's Edit Form:

- **Organization** - Name, Address, Phone, Email, Website address
- **Legal Status** - Legal Name, Tax ID, Registration Date, Verification Date, Tax Status
- **Background** - Background summary, AKA Name, Vendor No., Annual Budget
- **Wire Transfer** - Wire Transfer information captures information about the bank through which money will be wired to the grantee, rather than payment by check or some other form. This is a common method of payment when the recipient is in a different country. Multiple banks may be added here if the wire transfer requires passing through intermediary banks.
- **Coding** - The prompts in the Coding section are determined by the administrator in the Preferences of the Administrator Module.

NOTE: Additional sections may be visible if you have optional modules installed such as the Customizer.

The Organization Section of the Edit Form

Use this section to enter basic information about the Organization while adding or modifying Organizations.

Entering the Organization Name

The **Organization** section is where you enter the Organization name, address, phone number, Email, and website address. This is the minimum information that should be entered for any Organization.

When creating a new 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 open the existing Organization's edit form. 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** section to track the Organization's address information.

- **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 **PostalCode** fields *does not affect the addresses used in reports*, including the mailing list reports.

- **City:** The Organization's city.
- **State/Province/City:** The Organization's state, province, or county. Defaults to the state, province, or county specified by your administrator.
- **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.
- **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."
- **Extension:** The telephone extension.
- **Fax:** The Organization's fax number.
- **Email:** The e-mail address for the Organization.
- **WWW:** The Organization's address on the World Wide Web.

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 Organization Affiliation used to identify the person as the Organization's Primary Contact.

NOTE: You can also change or clear the Primary Contact.

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 Contacts 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.

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 from the list (or create a new one if needed).

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:

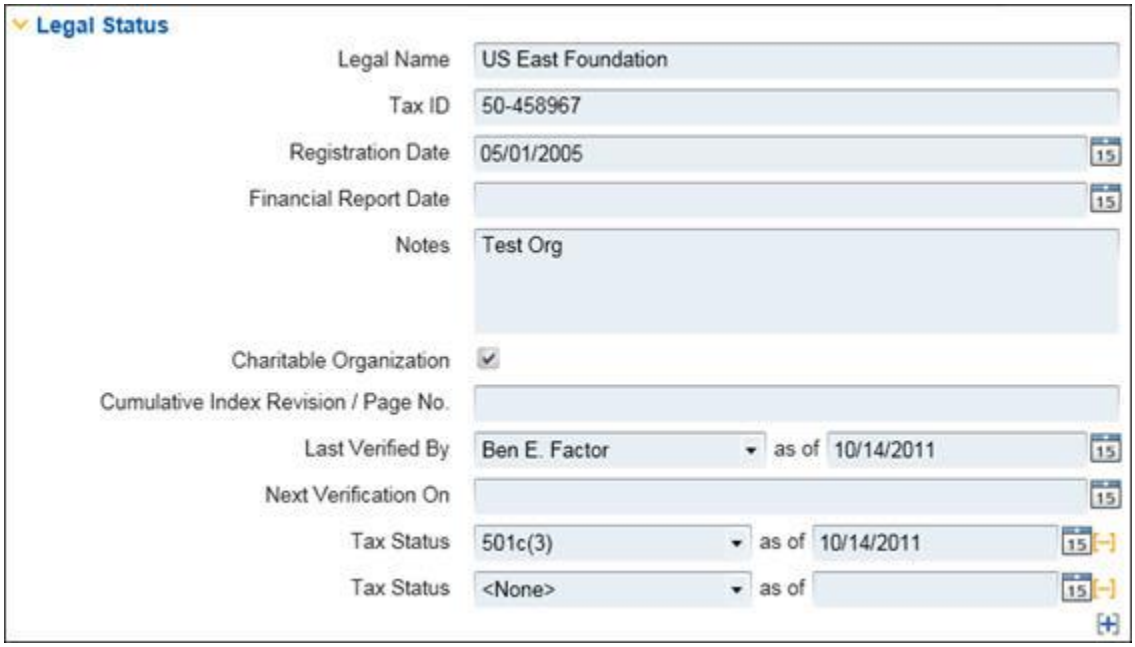
- Choose **Action > Clear Contact** from the Organization menu.
- Double-click anywhere in the box that contains the existing Primary Contact's name and telephone number.

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.

The Tax Status Section

This section allows you to enter IRS information, including the Organization's Charitable Organization Tax Status (if any), when adding or modifying Organizations.

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.



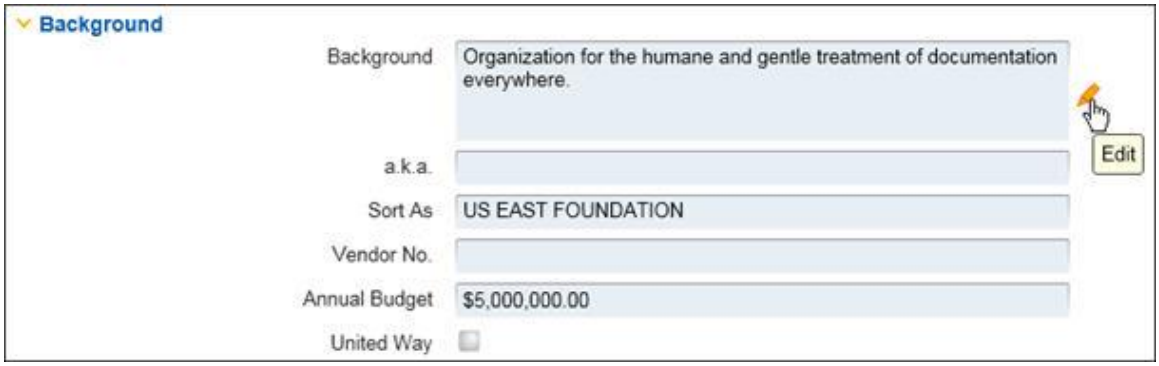
- **Legal Name:** The legal name of the Organization.
- **Tax ID:** The Employer Identification Number (EIN) of the Organization.
- **Registration:** Tax registration date.
- **Financial Report Date:** The date of the most recent copy of the Organization's financial report that you have on file. This 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.
- **Charitable Organization:** A checkbox indicating that the Organization is a public charity.
- **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 can be up to five status fields. To add another Tax Status line, click the **[+] Add** icon. To remove a Tax Status line, click the **[-] Remove** icon next to the field.
- **As of:** For each status, you can enter the appropriate "As of" date.

When the Tax Status information is complete, you can work with or view other information. If you are finished working with this Organization, click **Save and Close** to save the information and exit to the Workspace.

The Background Section of the Edit Form

When adding or modifying Organizations, you provide 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.

To access background information, open the Organization you wish to define or modify and scroll down to the **Background** section.



- **Background:** An unlimited text field that can be included on the write-up used by the Board to review Requests for this Organization. The **[Edit]** Pencil icon will open a larger popup window where you can view more of the text at once.
- **AKA:** 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 eliminating articles (like "the") from the beginning of names, expressing numbers as text (SIX for 6), and placing the entire name in upper-case characters.

  Example: An Organization named "The Make a Wish Foundation" would sort under "T." People looking for the Organization on a listing or in a 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.

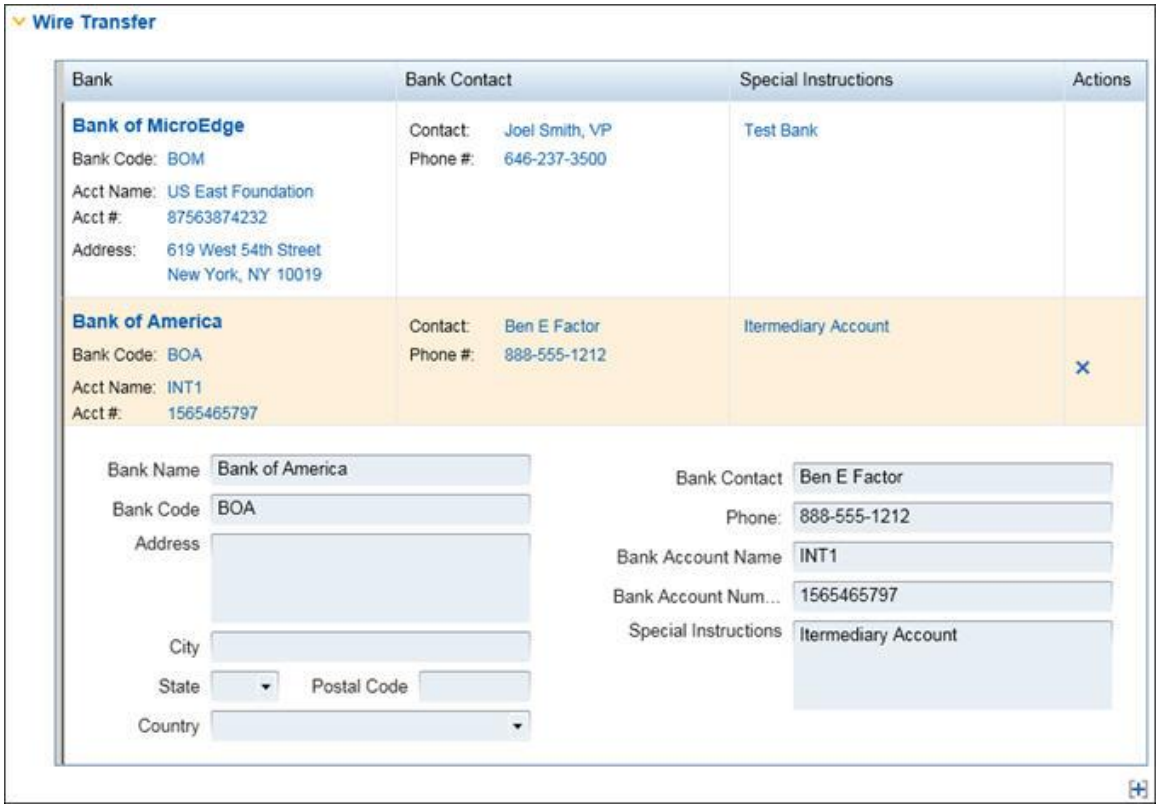
When the Background information is complete, click **Save**. You can then click on the other Organization sections to work with or view the information.

If you are finished working with this Organization, click **Save and Close** to save the information and exit to the Workspace.

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.

Once the default wire transfer information is entered, it can be applied to Requests and Payments for the Organization.



The following fields are available on the **Wire Transfer** tab for your primary bank account, as well as any intermediary accounts, when adding or modifying Organizations.

Recipient Bank Fields

- **Bank Name:** The name of the bank to which the funds are being transferred.
- **Bank Code:** The ABA number identifying the bank.
- **Address:** The street address of the bank.
- **City:** The city of the bank's address.
- **State/County/Province:** The state, county, or province of the bank's address.
- **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

- **Bank Contact:** 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

- **Bank Account Name:** The name of the bank account to which the funds are being transferred.
- **Bank Account Number:** The account number of the recipient's account.
- **Special Instructions:** Enter any special instructions required here. If intermediary accounts are being used as well, you may want to specify here if the account is the primary or intermediary.

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.

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.

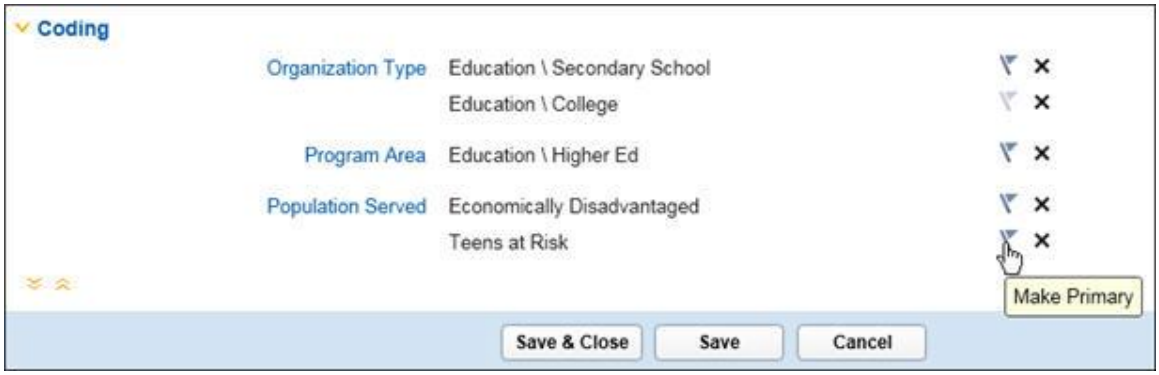
Click **[+] Add** to add a new **Intermediary** line in orange, and then enter your intermediary account information. To delete an intermediary account, simply go to the appropriate account line and click **[X]** in the Actions column.

The Coding Sheet Section of the Edit Form

When adding or modifying an Organization, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Organizations that allows you to choose classifications from a set of Categories defined by your GIFTS administrator.

NOTE: To Modify the Code tables available in the Coding section of the Organization edit form, go to the Administrator module. Under **Setup > Preferences**, click the **Codes** tab and modify the options as needed.

This section includes basic information about entering Coding Sheet data. Click here for more comprehensive information on working with Coding Sheets.



Adding Codes

To classify the Organization, click the **Organization Type** link. The codes defined for that category are displayed.

1. To add a code, double click it to move it the right side and then click **Done**. The code is displayed on the Coding Sheet section.
2. Repeat the same steps for any other Code categories on the edit form.
3. Click **Save** to save your changes and continue editing other sections. Otherwise click **Save and Close** to close the record.

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 listed at the top, and the *secondary codes* are listed below.

To make a secondary code the primary code within a category, click the **Primary Flag** icon next to the value.

Removing Codes

To remove a code, click the **X** next to the value.

If you are finished working with this Organization, click **Save and Close** to save the Organization and return to the GIFTS Workspace.

Adding and Modifying Organizations

Adding an Organization

To add a new Organization, do one of the following:

- From any work area, go to **New > Organization** in the ribbon menu.
- If you are in the middle of creating a new record of a different type (request, payment, etc.), and need to define a Primary Organization, click the **Search** icon on the primary card to see if the organization already exists. If not, click the **New Organization** link.
- Alternatively, if you know the organization is not in your database currently, you can click the **New** icon on the blank Primary Relationship Card for Organization on the right panel.

The blank Organization Edit Form is displayed.

1. Fill in all the fields as necessary.
2. Define the Primary Contact and Parent if possible.
3. Click **Save & Close** when done.

Defining the Primary Relationships for Organizations

There are two primary relationship cards on the right panel for all Organizations:

- **Primary Contact** - define the primary contact at the new organization.
- **Parent** - define a parent company, if one exists.

It is wise to define a Primary Contact for any new Organization.

NOTE: If you don't define a primary contact and try to Save the new organization, the system will ask if you wish to create one at this time.

1. To do so, first click the **Search** icon and enter the primary contact's last name.
2. Press **Tab/Enter** or click the orange button to begin the search.
3. If a match is found, double-click it to add it to the card.
4. If no match is found, click the **New Contact** link

TIP: If you absolutely know the new contact is not in your database, you can just click the **New** icon on the primary relationship card.

Modifying an Organization

To modify an existing Organization:

1. Use **Quick Find** to locate the Organization and double-click it on the search results page to open it's Edit Form.
2. Modify the data fields as necessary and click **Save**.
3. If necessary, you can also change the information in the Primary Relationship Cards by using the **Search, Open, New,** or **Remove** icons.
4. When you are finished working with the Organization, you can click **Save and Close**.

Organization Affiliations

IMPORTANT: General information about Organization Affiliations follows. Click here for detailed information about accessing, adding, modifying, and deleting 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 the Organization record's edit form, the **Related: Affiliations** link will display all primary and secondary Affiliations associated with the Organization.

The Affiliations List

The columns in the Affiliations list of an Organization display the following data:

- **Contact:** Lists the affiliated Contact's name, Affiliation Title, and Affiliation Address.
- **Organization:** Displays the 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

If the Affiliations link was used from the Organization's edit form, the list will be displayed in the same edit form window and present the following Filtering options above the grid:

- **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 Contact Type (Executive, Grantee, Fellow, Reviewer). Select <All> to see all 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.

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.

You can work with subsidiary Organizations as you add or modify an Organization.

Instructions in this help topic include information on adding, editing, and removing subsidiary Organizations.

NOTE: A Related link for **Subsidiaries** will only be available on the edit form of the Parent Organization. All actions for subsidiaries are performed in the **Subsidiaries** list in the edit form of the *parent* Organization.

The Related Subsidiaries List

The following columns are displayed on the Subsidiary Organizations list.

- **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 when adding or modifying a Payment.

When you create a Request for a subsidiary Organization, the parent Organization is also noted in the Request edit form information.

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, Primary Contact, 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 Parent Organization's edit form, go to **Actions > Add Subsidiary**. The Organization search form is displayed.

2. Enter the subsidiary Organization's name and press **Enter/Tab**.

   - If matches are found, GIFTS displays a list of the Organizations that met the search. Double-click the subsidiary from the list. The subsidiary is added to the parent Organization.

   - If no matches are found, click **New Organization**. You are asked if you want to apply the parent Organization's information to the new subsidiary.

   If you click **Yes**, the parent's Phone number, Email, and Legal information 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.)

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 Related **Subsidiaries** list of the parent Organization.

To edit a subsidiary Organization from the parent's **Subsidiaries** list:

1. Double-click the subsidiary to open the edit form.
2. Edit the information for the subsidiary as needed.
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** list of the parent Organization, highlight the subsidiary and go to **Actions > 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.

Posting an Alert

To post an alert:

1. Search for and open the Organization's record.
2. Go to **Actions > Set Alert**. The Alert message bar opens under the header area in orange with the cursor in a text field. Simply enter the message and **Tab** out of the field.

   The Alert Message will display each time a user opens the Organization record. Otherwise, users can click the **Alert** button to view the message.

3. Click **Save & Close** to save the alert and return to the Organization record.

Removing an Alert Message

To remove an alert:

1. Open the Organization's edit form.
2. Click the **X** on the right of the message bar to immediately remove the message.
3. There is no confirmation prompt.
4. **Save and Close** the Organization.

Deleting an Organization

CAUTION: 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.

TIP: 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 edit form.
2. Go to **Actions > 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

From within GIFTS, you can view an Organization's Web site, and (if set up properly in your GIFTS Administrator Module) its current non-profit status.

Viewing an Organization's Web Site

If the Organization has a site on the World Wide Web, you can access it directly from the Workspace.

NOTE: A website address must be saved in the Organization's edit form. Otherwise the **View Website** option will not be available on the ribbon menu.

To view the Organization's Web site:

1. Select the Organization—or any record associated with the Organization, such as a Request or Contact—in the Workspace grid, then go to **Actions > View Website**.

   GIFTS opens the site in your Internet browser.

Researching an Organization's Non-Profit Status

To verify an Organization's non-profit status and gather other useful information regarding the Organization:

1. Select the Organization in the Workspace grid and go to **Action > Research GuideStar** on the ribbon 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.

Working with Requests

This section describes how to work with requests for funding, including how to enter, update, approve, and decline them.

Searching for Requests

About Requests in the Workspace

Adding or Modifying a Request

Decision Making

Approving a Request

Request or Requirement Resubmission

Changing the Status of a Request

Uploading Updated Request Statuses to IGAM

Rolling a Request Back to Pending

Locking and Unlocking Requests

Renewing Grants

Amending a Grant

Deleting a Request

Processing Batches of Requests

Using Request Alerts

Transferring a Request to Another Organization

Transferring Requests to Another Branch

Transferring a Request to a New IGAM Owner

Searching for Requests

You can search for Requests using all GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details all the Query Builder search filters available for Requests.

To access the Requests filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.

3. Click the **Requests** Record type on the left.
4. Click the **More filter options** link in the lower right.

You can search on any combination of the filters available.

NOTE: Some of these filters, such as Approval Date, apply only to Requests of a specific disposition.

- **Application ID:** The ID number assigned to the application when it is submitted through IGAM.
- **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.
- **Customizer:** If you have the Customizer installed, this option will allow you to select from the fields you have created using the Customizer.
- **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 the Request record).
- **Form:** The IGAM form number used for the application.
- **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.
- **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.
- **Secondary Staff:** The name of the secondary staff member assigned to the Request.
- **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 Requests in the Workspace

When you do a search using Quick Find, Query Builder, a Saved Search, or the Related links, the Workspace provides a list of Requests that met your search criteria.

You can customize the format, sort order, and content of the information in the Workspace, as described in here.

By default, the following information is displayed in the Workspace:

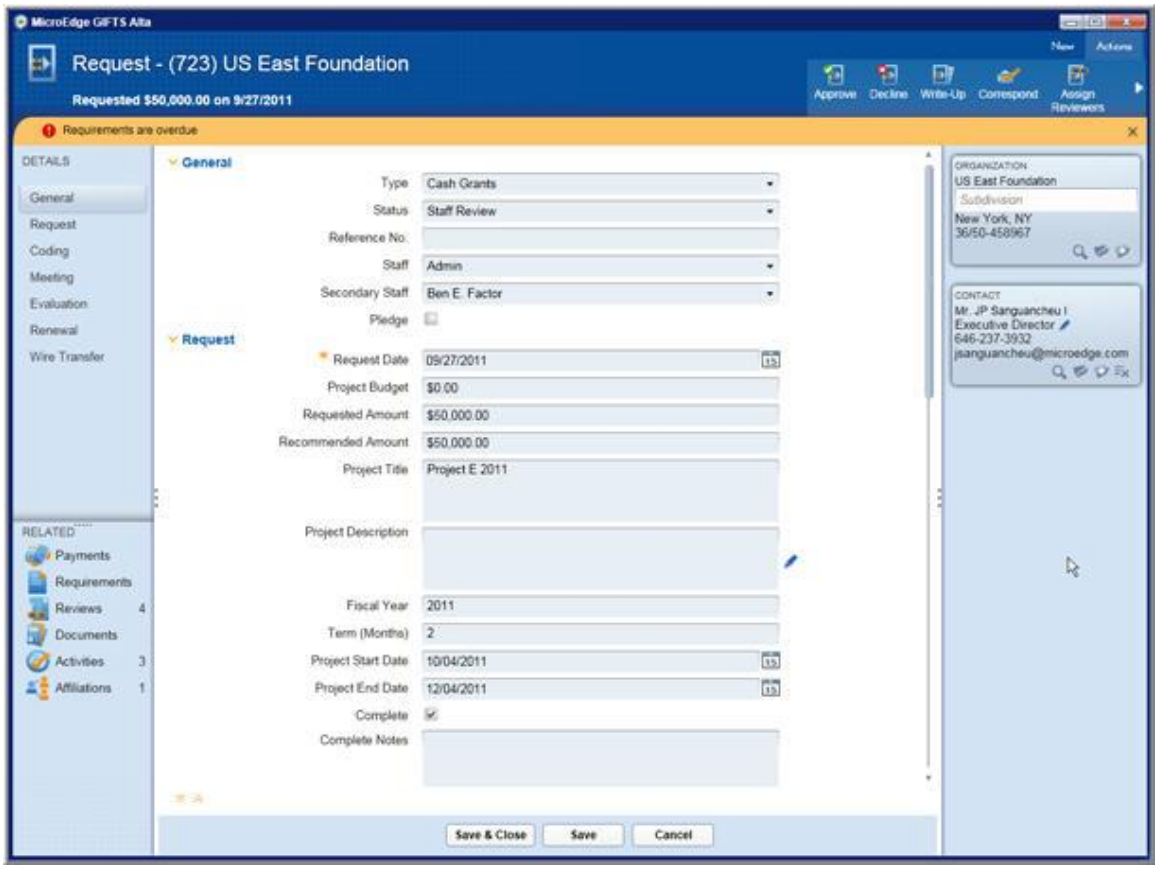
- **Locked Status:** A padlock is displayed if the Request has been locked. If the lock is green, you can edit the Request. If it is red, you cannot.
- **Alert Status:** A red exclamation mark is displayed if an alert has been posted for the Request. You can double-click on the mark to view the alert.
- **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.
- **Organization:** The name of the requesting Organization and the name and telephone numbers for the Primary Contact identified on 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.

NOTE: There is no color coding for Request dispositions in Alta. Request search results can be easily sorted by clicking the Disposition column header.

The Request Edit Form

The **Requests** Edit Form displays information after you have successfully searched for a Request and double-clicked on the listed record on the search results page in the Workspace.

NOTE: If there is an alert set on the Request, it will be displayed in an orange bar on top of the page below the header.



The Request Edit Form contains the basic information for each Request you add or modify.

IMPORTANT: You cannot save a Request until you have entered its **Request Date**.

The information displayed is different depending upon the disposition of the Request. The information for approved and declined items is discussed in the sections the Approving a Request help topic and Declining a Request help topic.

By default, the following Detail categories are available on the Request's Edit Form:

- **General:** Specifies Type, Status, and Staff members assigned. Will also display the Branch field if you have branch security enabled and the IGAM Account, if associated.
- **Approval:** This section only appears on *Approved Requests*. It displays the Granted amount, the Grant Date, Fiscal Year, Term, and Project Start/End Dates.
- **Declination:** This section only appears on *Declined Requests*. It displays the Declination Reason, Date, and any Notes.

- **Request:** Includes the request Date, Project Budget, Requested Amount, Recommended Amount, Project Title, Description, Fiscal Year, Term (months), Start/End Dates, Completion Notes, and the Stage 1/2 IGAM Form Titles (if IGAM is installed).
- **Coding** - The prompts in the Coding section are determined by the administrator in the Preferences of the Administrator Module.
- **Meeting:** Displays the Meeting Date, Docket number, and Meeting Minutes.
- **Evaluation:** Displays the evaluation notes.
- **Renewal:** Displays the renewal status of the request and allows you to make the Request renewable with a set date.
- **Currencies:** This section only appears if you have the Track Local/Other Currencies preference enabled in the Administrator module. For Requested, Recommended and Granted Amounts, the fields in this section track the value in the currency of the grantmaker against the value in the currency of (usually) the grantee. The specific values and defaults come from the Administrator modules features Setup > Local/Other Currencies.
- **Wire Transfer** - If the **Default all Payments to Wire Transfers** is checked, all scheduled payments will be sent via wire transfer to the bank(s) entered for the related Organization. Simply check the box, and click **Save & Close**. Reopen the record again and you will notice all the bank information from the Organization record has been filled in.

  Wire Transfer information captures information about the bank through which money will be wired to the grantee, rather than payment by check or some other form. This is a common method of payment when the recipient is in a different country. Multiple banks may be added here if the wire transfer requires passing through intermediary banks.

NOTE: Additional sections may be visible if you have optional modules installed such as the Customizer.

For more details on the various sections and fields available on the Request Edit Form, see Request Edit Form Sections.

Request Edit Form Sections

The following is a detailed description of all the fields presented on a typical Request edit form.

The General Section

Below is a description of each of the fields on this section of a Request Edit Form:

- **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.
- **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: Note that once GIFTS automatically assigns a Reference Number, only users in the Admin user group can change it.

- **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
- **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.

The Approval Section

Below is a description of each of the fields on this section of a Request Edit Form:

NOTE: This section on appears on Approved Requests.

- **Granted:** This read only field displays the granted amount.
- **Grant Date:** Displays the Date the Request was Approved.
- **Fiscal Year:** This read only field displays the Fiscal year of the grant.
- **Term (Months):** The term of the grant in months.
- **Project Start Date:** The start date of the project.
- **Project End Date:** The end date of the project.

The Declination Section

Below is a description of each of the fields on this section of a Request Edit Form:

NOTE: This section only appears on Declined Requests.

- **Declination Reason:** The reason the Request was declined.
- **Declination Date:** The date the Request was declined.
- **Declination Notes:** Any additional notes regarding the declination.

The Request Section

Below is a description of each of the fields on this section of a Request Edit Form:

- **Request Date:** The date on which the Request was made, usually the date of the proposal or the date on which it was received.
- **Project Budget:** The total project budget of the Request, which is not necessarily the same as the amount being requested.
- **Requested Amount:** The total amount requested by the Organization.
- **Recommended Amount:** The amount recommended by the staff for approval.
- **Project Title:** A short description of the project. More details can be added to the Project Description field.
- **Project Description:** This unlimited field allows you to enter more details about the project. Clicking the Edit (pencil) icon on the right will open a larger window where you can enter your information.

- **Fiscal Year:** This 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.
- **Term(Months):** The term of the grant, in months (the default is "12").
- **Project Start Date:** The start date of the project.
- **Project End Date:** The end date of the project.
- **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 cannot be approved until they are checked as Complete.
- **Complete Notes:** This field allows you to note why the Request is not complete, and any other information.
- **Stage 1 Form:** Displays the title of the IGAM Stage 1 form used.
- **Stage 2 Form:** Displays the title of the IGAM Stage 2 form used.

The Coding Section

The Coding fields will vary according to how your administrator configures the Code Table settings in the Administrator Module.

For details on how to use the Coding section, see The Request Coding Sheet Section.

The Meeting Section

Below is a description of each of the fields on this section of a Request Edit Form:

- **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.

- **Meeting Minutes:** This field allows you to enter the meeting minutes information.

The Evaluation Section

Below is a description of each of the fields on this section of a Request Edit Form:

- **Evaluation** This field allows you to 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.

The Renewal Section

Below is a description of each of the fields on this section of a Request Edit Form:

- **Renewal:** This displays Yes only if the Request was created through the renewal process.
- **Prior Grant ID:** Only displayed if the Request was created through the renewal process.

- **Renewable:** Controls whether the Request will be renewed in the future. When checked, this option reveals the Renew Date field.
- **Renew Date:** This field controls when the Renew process will be implemented by the system. This process creates a new Request record using the information from the selected Request as defaults. It also creates a link between the original grant and the renewed grant.

Currencies

NOTE: This section is only displayed if the Track Local Currencies preference is enabled in the Administrator Module. If the Request has been Approved, all these fields will be read-only.

- **Local/Other Currency:** When the currency is selected, the various Rate Date and Exchange Rate information default into the fields below based on the Exchange Rate table in the Administrator Module.
- **When Exchange Rates Change:** Defines how GIFTS should react if rates change.
- **Requested - Functional Amount:** Identical to the Request Amount field.
    - **Local/Other:** Calculated as the Request Amount multiplied by the Exchange Rate.
    - **Rate Date:** The date of the most recent rate for the selected currency from the Exchange Rate table if the Preference is enabled to track historical currencies.
    - **Exchange Rate:** The rate for the specified currency from the Exchange Rate table.
- **Recommended - Functional Amount:** Identical to the Recommended Amount field.
    - **Local/Other:** Calculated as the Recommended Amount multiplied by the Exchange Rate.
    - **Rate Date:** The date of the most recent rate for the selected currency from the Exchange Rate table if the Preference is enabled to track historical currencies.
    - **Exchange Rate:** The rate for the specified currency from the Exchange Rate table.
- **Granted - Functional Amount:** Displayed only if the Request has been Approved.
    - **Local/Other:** Calculated as the Recommended Amount multiplied by the Exchange Rate.
    - **Rate Date:** The date of the most recent rate for the selected currency from the Exchange Rate table if the Preference is enabled to track historical currencies.
    - **Exchange Rate:** The rate for the specified currency from the Exchange Rate table.

Wire Transfer

Below is a description of each of the fields on this section of a Request Edit Form:

Default all Payments to Wire Transfer: This checkbox tells the system to send all future scheduled payments via wire transfer. When you Save and Close the record, the system will automatically fill in the Wire Transfer data from the Organization record.

If the Organization record does not have Wire Transfer data, you will need to enter it in manually and Save the Request record.

The Request Coding Sheet Section

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 section of your Request records.

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. Click here for more comprehensive information on Coding Sheets.

Adding Codes

To classify the Request, click the category in which you wish to supply a code and the codes defined for that category are displayed.

To add a code, double click it to move it to the right Selected Codes side.

To add a code to another category, you can use the drop down menu on top to display its coding without closing the Code Sheet window.

When you are finished adding codes, click **Done**.

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 on top, and the *secondary codes* are below.

To make a secondary code the primary code within a category, click the **Primary** flag next to the value.

Removing Codes

To remove a code, click the **[X] 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 Workspace.

Request Primary Relationship Cards

The Edit form for Requests will by default have two Primary Relationship Cards displayed on the right panel.

- Organization
- Contact

On new Requests, these cards may be blank and you will need to link them to an existing Organization and Contact or create new ones.

For more details on how to add new primary relationships or change them, see Primary Relationship Cards.

Adding or Modifying a Request

Adding a New Request

In GIFTS Alta there are three ways of creating a new Request:

- Click the **New > Request** option from ribbon menu in the Dashboard, Workspace, or Reports area.
- Quick Find the Organization or Contact you want related to the Request and select it (checkbox) from the search results and then go to **New > Request**. GIFTS automatically associates the Request with the selected Organization or Contact on the Primary Relation Cards panel.
- Open the Organization or Contact's edit form and then go to **New > Request**. GIFTS automatically associates the Request with the open Organization or Contact on the Primary Relation Cards panel.

Modifying a Request

To modify an existing Request, Quick Find the Request and then:

- Double-click it on the search results list to open it's edit form and make changes to the data.
- Select it on the search results list and choose from one of the available choices on the **Actions** menu.

TIP: To modify multiple records at once, select several records on the search results list and then go to the Actions menu. If you select **Actions > Open**, GIFTS will open all selected records in

batch mode and allow you to move back and forth using the navigation arrows at the bottom of the page.

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.

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 more information, please refer to the following help topics

- Declining a Request
- Approving a Request
- Rolling a Request Back to Pending
- Changing the Status of a Request
- Uploading Updated Request Statuses to IGAM
- Locking and Unlocking Requests
- Renewing Grants
- Amending a Grant
- Deleting a Request
- Requesting a Resubmission

You can also process Requests in batches; click here for more information.

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.

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.

You can decline a Request directly from the Workspace or from within the Request record, as follows:

- In the Workspace, select the Request and choose **Action > Decline** from the ribbon menu.
- Open the Request edit form and choose **Action > Decline** from the ribbon menu.

You can enter the following information for the declination:

- **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. REQUIRED.
- **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**. The Request is updated to display the declination information, and the disposition of the Request becomes Declined.

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.

Approving a Request

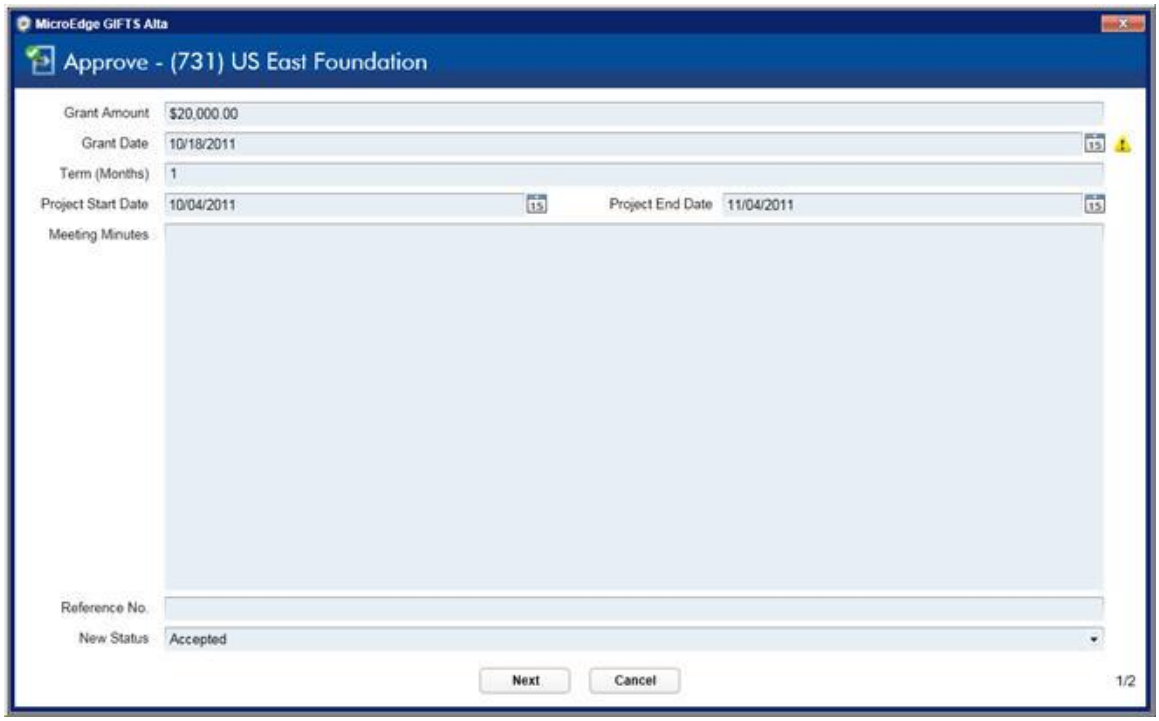
When you approve a Request, you can record the Grant Amount, the Grant Date, and other important information. You can also approve a batch of Requests together.

You can approve a Request directly from the Workspace or from within the Request record, as follows:

- In the Workspace, select the Request and choose **Action > Approve** from the ribbon menu.
- Open the Request edit form and choose **Action > Approve** from the ribbon menu.

The Approval Wizard guides you through the grant approval process:

Award and Project Information Page



You can enter the following information:

- **Grant 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.
- **Grant 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:** If the field was not populated while pending, the fiscal year will be based on the Grant Date (which will be the Meeting Date, if one exists, or today's date, if not). The fiscal year is calculated by taking that date and the client's Fiscal Year setup method in Preferences to calculate the appropriate fiscal year for that date. **NOTE:** This is hidden if the Preference to *automatically recalculate grant fiscal year* is enabled.
- **Term (Months):** The term of the grant, in months.
- **Project Start Date:** The start date of the grant, which is often but not always identical to the grant date. Defaults to the grant date.
- **Project End Date:** The date on which the grant ends. The default is based on the grant date and the grant term entered.
- **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.

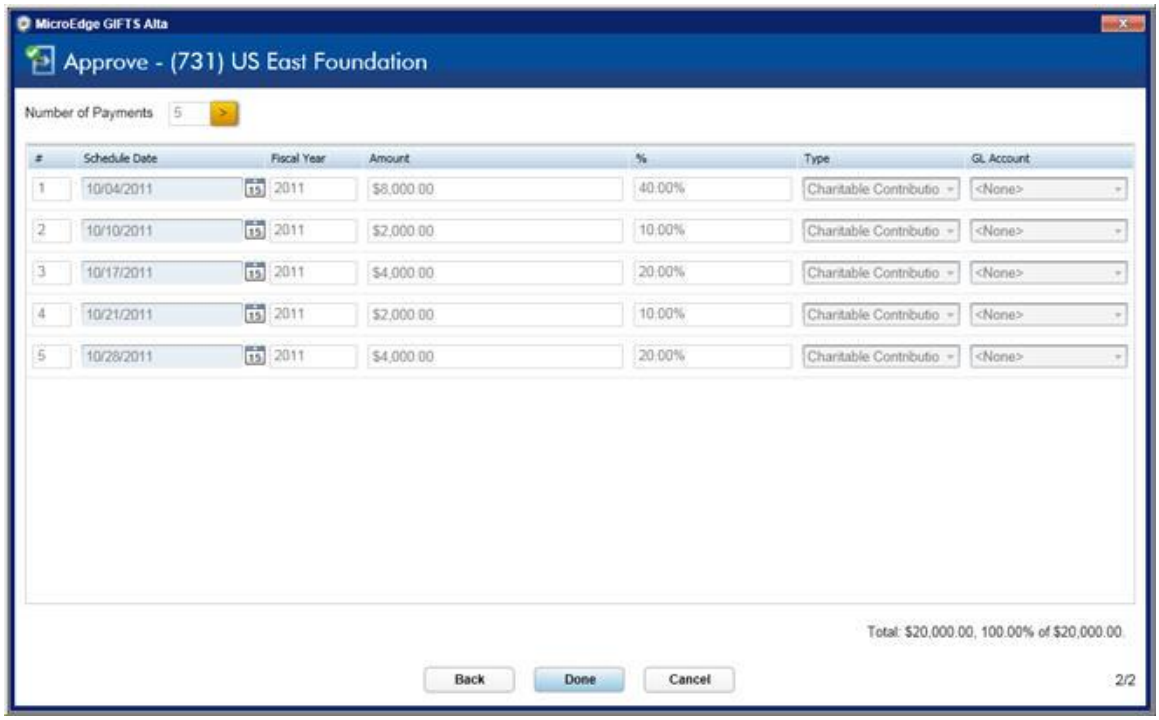
If GIFTS is set to automatically assign a Reference Number, this field is disabled. Note that when GIFTS automatically assigns a Reference Number, only users in the Admin user group can change it.

- **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**.

NOTE: If the Preference to track Local/Other Currencies in the Administrator Module has been enabled, prompts for **Local/Other Currency, Rate Date, Exchange Rate, Local/Other Amount**, and **When exchange rates change** also appear on the Approval page.

Payment Schedule Page



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 lists them as read-only. Click **Next** to skip this step.
- Otherwise, you are given the opportunity to schedule Payments for the Request.

The Payment(s) schedule is based upon the Grant Term and Number of Payments that you enter. GIFTS automatically generates the Payment(s) that will be made on the grant and schedules any Requirements that are due from the grantee.

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.)

- **Number 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.
- Default is 1. To change the number of payments, simply type in the number required and click the orange button.
- Based on the Number of Payments, the payments are then listed below in order:
- **Payment Number:** The number of the payment. Multiple payments can be assigned the same number.
- **Schedule Date:** The Payment Schedule Date of the grant payment(s). By default, the first payment is the same as the grant date.
- **Fiscal Year:** Fiscal Year is based on Request Grant Date. This field defaults to the fiscal year in which the Grant 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.

  The Fiscal Year value for this Request may be updated automatically when and if the Grant Date is later changed. Contact your GIFTS administrator to find out how your system is set up to handle such a change.

- **Amount:** The amount of the payment. GIFTS Automatically divides the total grant amount by the number of payments to make equal amounts. You may change the amounts, if desired; however, the total must add up correctly or you will get a warning message on the bottom and the **Done** button will be disabled.
- **[%]:** This reflects the percentage of the payment compared to the total grant.
- **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.

- **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, as described here.

Click **Done** to approve the Request.

The Request updates to display the approval information, and the disposition of the Request changes to Approved.

The Approval section is added to the Request edit form.

Budget Resolution/Appropriation Page

This page of the wizard is only included if you have the optional Budget Module installed.

The budget resolution form opens unless any of the following conditions are met:

- There are no Payments for the Request (meaning also that none are being added during the approval process).
- All Payments are committed against the budget (meaning again that none are being added during the approval process). (See Updates below for changes made regarding committed Payments upon Request approval.)
- Fiscal Year(s) of all Payments fall during Budget Year(s) when the Request's Type does not hit the budget.
- There are uncommitted Payments, but their Fiscal Year(s) all fall in Budget Year(s) which are not Open or don't exist yet.

The resolution form will list all Payments which fall in Budget Year(s) which are Open. Resolution is optional until you try to pay a Payment.

CAUTION: If you set up budget resolution here, then go back to the Payments page of the approval wizard and change any Payment data, the resolution info for all Payments is cleared, not just the edited Payment.

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.

To roll back an approved or declined Request:

1. In the Workspace, select or open the Request.
2. From the ribbon menu, go to **Actions > 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.

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.

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 Workspace, select the Request.
2. From the ribbon menu, choose **Actions > Status Change**. You are prompted to choose a new status:

   You can enter the following information about the status change:

   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.

   Status 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.

   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

IMPORTANT: This feature only appears if you have IGAM installed.

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.

Upload the Status of Selected Requests

1. Select one or more Requests on the Workspace.
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**.

Upload All Request Statuses to IGAM

To update ALL requests that have been previously uploaded, as well as any new eligible Requests, go to the User Menu and select the **IGAM > Upload Request Statuses** option.

This action will also delete Payments from the My Account pages that were previously created and then deleted in GIFTS.

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.

Locked records display the lock icon in the Workspace. 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 Workspace grid, open the Request or select 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 or multiple Documents by selecting them on the Related list.

To Unlock a Request

1. Open the Request or select it in the Workspace 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.

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.

Specifying Renewal Eligibility

The Renewal Information fields 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.

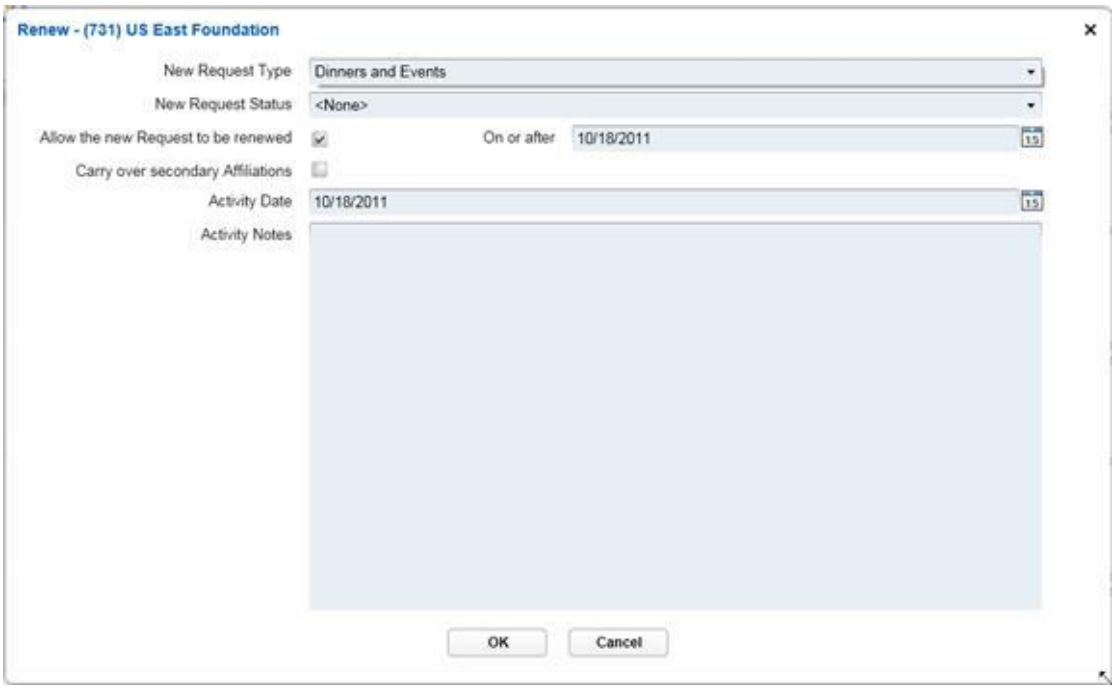
1. To indicate that the Request can be renewed, select the **Renewable** check box. The date field directly below this option is enabled.
2. To specify the date on which this Request becomes eligible for renewal, enter the appropriate date in the date field.
3. Click **Save and Close** to save your changes to the Request.

To Renew a Grant

1. In the Workspace, select 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 **Actions > Renew**.



New Request Type: You can choose for the new Request to be the same type as the original grant, or you can choose a different type.

New Request Status: 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).

Allow this request to be subsequently renewed: If the new Request should be available for renewal at a certain point, select this 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.

Carry over secondary Affiliations: By default, the only Contact renewed is the Request Primary Contact identified on the Request. If you wish for the Contacts listed on the Affiliations tab of the Request to be carried over, select this check box.

Customizer fields: 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.

Activity Date and Notes: These 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 and notes regarding the renewal.

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 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.

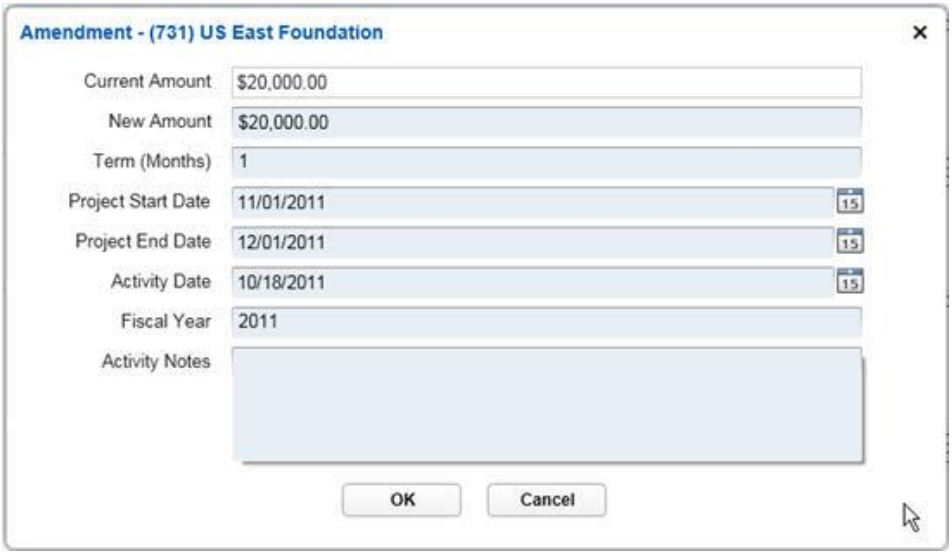
Amending a Grant

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.

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 **Actions > Amend Grant** from the menu to amend its Grant Amount.

The **Grant Amendment** window opens.



In the **Grant Amount** section of the Grand Amendment window:

- **Current Amount:** The amount of the grant prior to the amendment that you are performing.

- **New Amount:** The new amount of the grant. GIFTS supplies the *total* amount of the new Payment Schedule, not the amount of the amendment.
- **Term (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.
- **Project Start Date:** The Start Date of the grant—in general, the Start Date is not affected by Grant Amendments.
- **Project End Date:** The End Date of the grant—GIFTS updates this field to reflect any change you make to the Grant Term.
- **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.

- **Activity Notes:** GIFTS records these notes in the Activity record created for the event.

Click **OK** to save the amendment.

Deleting a Request

CAUTION: 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. Go to **Actions > Delete** on the ribbon menu. You are prompted to confirm that you want to delete the Request.

IMPORTANT: The **Delete** function is only available on the Request edit form.

Request or Requirement Resubmission

NOTE: You must have the IGAM Module and the 'Grant Application Resubmission' permission in order see this option in GIFTS Alta. Administrators will have resubmission permissions by default.

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.

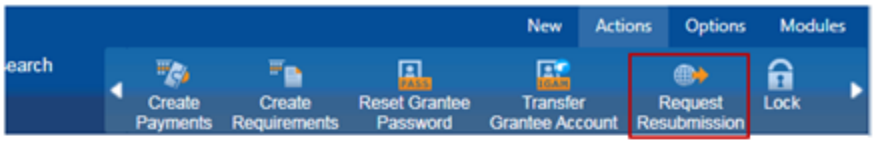
The applicant cannot initiate the resubmission. It must be requested by the grantmaker first.

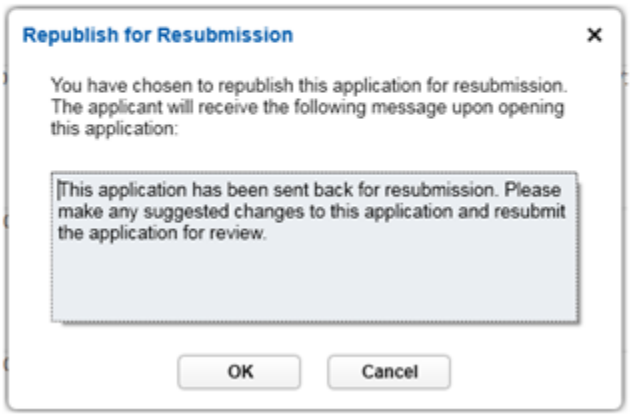
Initiating Resubmissions

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 an open Request in GIFTS Alta, a Resubmission action will be available in the Action menu for **Request Resubmission**.





A form will open to allow the user 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 their My Account 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 IGAM 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.

Notes about Request Resubmissions:

- 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:

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.

Processing Batches of Requests

You can perform several actions to a group of Requests all at once:

- Approve them
- Decline them
- Change their Status
- Lock or unlock them
- Renew them
- Classification Codes and Other Fields

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.

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. Search for the Requests and then select all of the Requests you wish to Approve.

2. Choose **Actions > Approve** from the menu.
3. The Approval Wizard form opens with the number of requests displayed on top.

Approval/Project Information Page

The batch version of the approval form very similar to the single version, but some of the options you had in single mode will be calculated automatically or derived from the Request.

You can enter the following information:

- **Grant 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. In batch mode this field will state 'Recommended Amount' and be read-only.
- **Grant 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:** If the field was not populated while pending, the fiscal year will be based on the Grant Date (which will be the Meeting Date, if one exists, or today's date, if not). The fiscal year is calculated by taking that date and the client's Fiscal Year setup method in Preferences to calculate the appropriate fiscal year for that date. **NOTE:** This is hidden if the Preference to *automatically recalculate grant fiscal year* is enabled.
- **Term (Months):** The term of the grant, in months. Defaults to 'Request's Term' in batch mode.
- **Project Start Date:** Defaults to the Grant Date but can be changed if desired.
- **Project End Date:** The calculated default is based on the grant date and the grant term entered.
- **Meeting Minutes:** The relevant part of the minutes from the meeting at which these requests were approved, if any. This information can be included in Board Meeting Minutes reports produced for the Board's next meeting.

  Note: In batch mode, any text entered here will overwrite the existing value in the Request.

- **Reference #:** Defaults to the read-only text 'Assigned manually' unless the **Automatically Generate Grant Reference Numbers** preference is enabled in the Administrator module, in which case it says 'Calculated.'

- **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.

  This field is hidden unless all Requests in the batch have the same Request Type, in which case the drop-down is populated with the Statuses associated with that Type, and with either the Approved Disposition or any Disposition. It will default to the last value that the current user picked when approving a single Request of that Type.

When you are finished, click **Next**.

Payment Schedules Page

The Approval Wizard now asks you for information concerning payment schedules for the grants.

NOTE: The scheduling of Payments will only be applied to Request's that have no pre-existing Payments.

The Payment(s) schedule is based upon the Grant Term and Number of Payments that you enter. GIFTS automatically generates the Payment(s) that will be made on the grant and schedules any Requirements that are due from the grantee.

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.)

- **Frequency:** A drop-down allowing you to specify the time allotted between multiple Payments when setting up the default Payment Schedule. Values are: Monthly, Bi-Monthly, Quarterly, Bi-Annually, and Annually. The default will be "Annually".
- **Number 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.
- Default is 1. To change the number of payments, simply type in the number required and click the orange button.
- Based on the Number of Payments, the payments are then listed below in order:
- **Payment Number:** The number of the payment. Multiple payments can be assigned the same number.
- **Schedule Date:** The Payment Schedule Date of the grant payment(s). By default, the first payment is the same as the grant date.
- **Fiscal Year:** Fiscal Year is based on Request Grant Date. This field defaults to the fiscal year in which the Grant 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.

  The Fiscal Year value for this Request may be updated automatically when and if the Grant Date is later changed. Contact your GIFTS administrator to find out how your system is set up to handle such a change.
- **[%]:** This reflects the percentage of the payment compared to the total grant.
- **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.
- **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.

If you track Request amounts in other currencies, click **Next**. Otherwise, click **Done** to approve the Requests.

Local/Other Currency Page

NOTE: This page of the wizard is only included if the **Local/Other Currency** preference has been enabled in the Administrator Module.

4. Click **Done**. The Requests are marked Approved and automatic Payments are generated. A process log lists the results.
5. 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.
6. Click **Close** to exit the process log.

Declining a Batch of Requests

NOTE: 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 Workspace, select all of the Requests you wish to Decline.
2. Choose **Actions > Decline** from the ribbon menu.

   You can enter the following information about the Declinations:

   - **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.
   - **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.

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 Workspace, select all of the Requests you want to work with.
2. Choose **Actions > Change Status** from the ribbon menu.

   You can enter the following information about the Status changes:

   - **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.

     Status 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.
   - **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 Workspace, select all of the Requests you wish to lock.
2. From the main menu, choose **Actions > 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 and unlock individual Documents as well.

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 Workspace, select all of the Requests you wish to unlock.
2. From the main menu, choose **Actions > 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 Related Documents list of a record.

   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.

IMPORTANT: All Requests selected must be checked as **Renewable** and be past the **Renew Date** to be eligible.

To renew a batch of grants:

1. In the Workspace, select all of the grants you wish to renew.
2. From the Main menu, choose **Actions > Renew**.
3. You can choose for the new Requests to be of the same **Request Type** as their respective original grants, or you can choose a **New Request Type** that is applied to every renewal in the batch.
4. To specify a **New 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).

5. By default, the only Contact renewed is the Request Primary Contact identified on the Request. If you wish for the Contacts listed in the Affiliations of the Request to be carried over, enable the '**Carry over secondary Affiliations**' option.
6. If the new Requests are also renewable, enable the option to '**Allow the new Request to be renewed**'. (If this option is not set, and you subsequently wish to renew the Request, it can be set manually on the Requests later.) Then, specify the date at which the new Requests will be eligible for renewal. This date defaults to the current date.
7. The 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 **Activity Date** on which the grant was renewed and **Activity Notes** regarding the renewal.
8. Click **OK** to begin the processing. As GIFTS processes the batch, the process log lists the results.
9. 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.
10. Click **Close** to exit the process log.

Batch Updating Classification Codes and Other Fields

Code table values and other fields can also be updated using the **Batch Update** action.

Fields available will include:

- Any classification codes used on the Request forms
- Project Description
- Staff member assigned
- Type/Status

When you click the **Batch Update** action, you will get a popup menu with the available fields.

Clicking the drop-down will display all of the possible fields that can be changed in batch.

Selecting one of the fields will then refresh the form to display all the related options.

Once you click **Update**, the changes will be saved and the form will close.

If you want to update another classification code, you must click the **Batch Update** action again on the main menu.

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.

Posting an Alert

To post an alert:

1. Search for and open the Request's record edit form.
2. From the ribbon menu, choose **Actions > Set Alert**.
3. The orange alert bar will be displayed below the header area.
4. Click in the area where it says **<Type alert message here>** to open the text field and enter your message.
5. Press **Tab** to move out of the text field.
6. Click **Save & Close**.

Removing an Alert Message

To remove an Alert, open the Request edit form and click the **X** Remove icon on the alert message bar.

Save & Close the Request. GIFTS cancels the Alert.

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.

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 edit form.
2. Click the **Search** icon on the Primary Organization Relationship Card on the right panel. The Search window is displayed.
3. Find the Organization to which you wish to transfer the Request and double click it. (If you cannot find the Organization in your database, click **New Organization** 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 card.
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 edit form.
2. From the ribbon menu, choose **Actions > 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). 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. Perform a Search and then select the Requests you wish to transfer.
2. From the main menu, select **Actions > 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.

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.

5. A process log opens, detailing the results of your batch transfer.

Transferring a Request to a New IGAM Owner

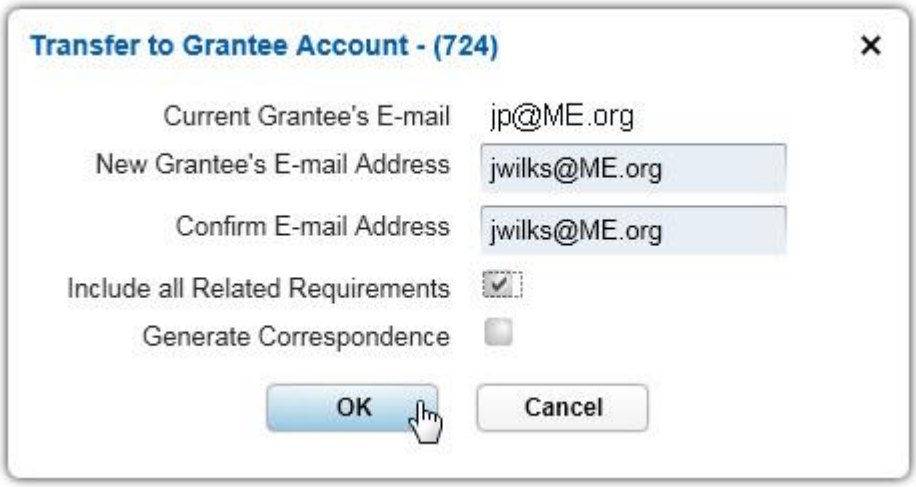
In some cases, you may wish to change the Owner for a Request. Perhaps the project changed hands, or the Request was entered incorrectly.

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 **Actions ➢Transfer Grantee Account**.
   The 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 Grantee'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 9 Working with Requests 236 Deleting a Request Requirements categories with the intention to be sent to an organization's primary contact or other contacts/affiliations notifying them of the transfer.

Percentage Coding

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:

- You must have GIFTS Alta installed.
- If IGAM is installed, you must have IGAM 5 or higher.
- If GIFTS Connections Server (GCS) is installed, you must have version 3.6 or higher.

IMPORTANT: Percentage Coding does not require IGAM or GCS 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 Settings for Percentage Coding

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 section 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.

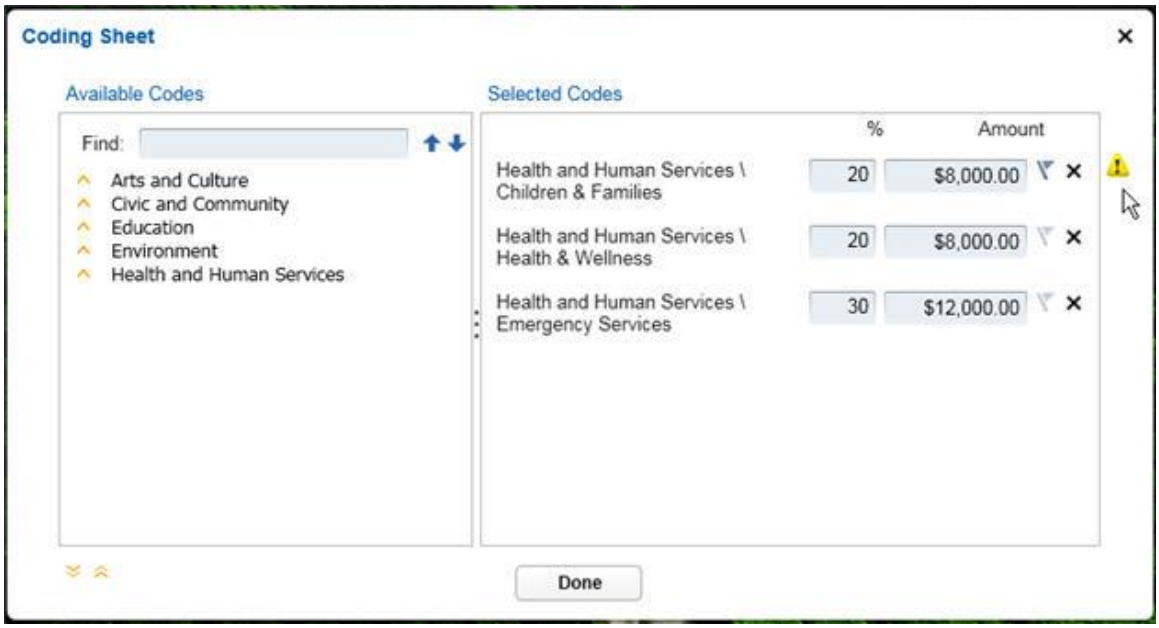
IMPORTANT: An exclamation mark next to the primary amount means you are over or under 100% allocation.

Two icons are available next to each value selected.

Clicking the **flag** icon will make the value become the Primary. Clicking the **X** icon will remove the value from the record.

To select code values, click one of the displayed Code table classifications.

If percentage coding is enabled, the Coding Sheet form will also have columns displayed for any percentage coding.



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 in Workspace Charts

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

1. Search for your Request(s).
2. Select the Requests you desire to chart.
3. Go to Options > Chart to open the Workspace Chart Configuration window.
4. Select a **Chart Type** from the drop-down menu on top. button and select a percentage coding enabled Code Table and level.
5. Review the **Filter** data on top to be sure you have the correct requests selected.
6. Set **Value Charted** to Sum, Avg, Min, or Max.
7. Percentage Coding will be hidden if Count is selected.
8. Set Category to Request and Column to Grant Amount or Request amount.
9. For Group By, set Category to Coding Sheet and Column to a percentage enabled table.
10. Select secondary Group By settings if desired.
11. Click **OK** to view your new chart.

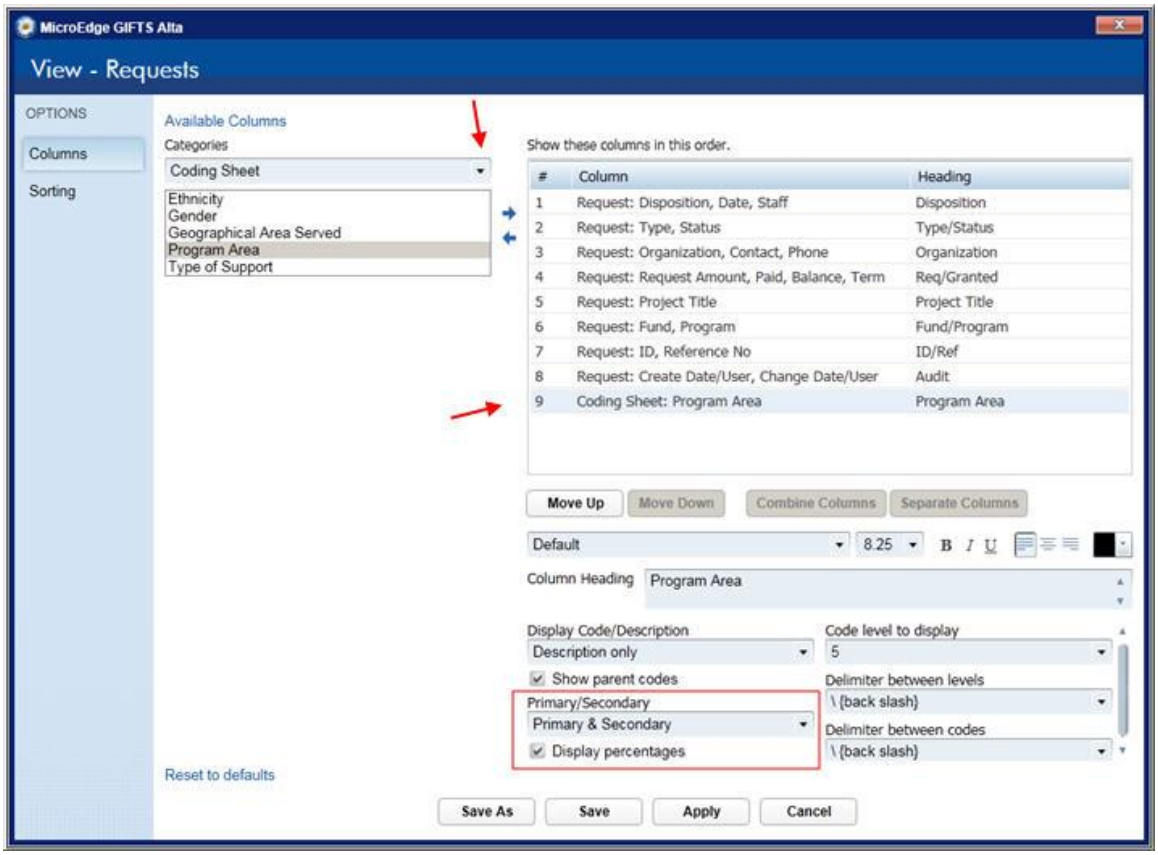
For more details on Workspace Chart features, please refer to Chart Records in the Workspace.

Percentage Coding in Request Views

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

1. In the GIFTS Workspace, click the **Open View** icon next to the View menu.

2. Under Available Columns, select *Coding Sheet*.

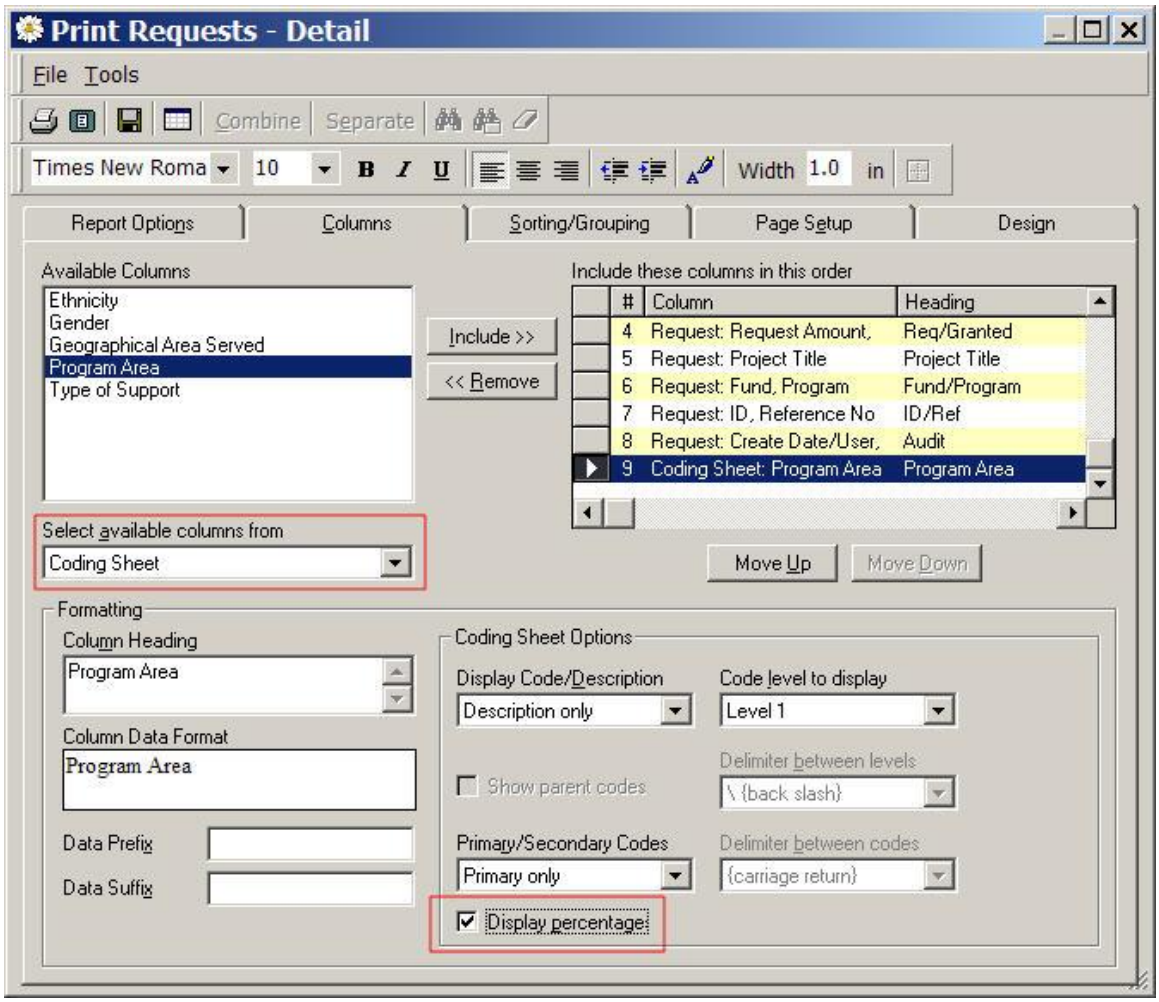


3. Add the percentage coding enabled table to the Show list on the right.
4. Click on the new table on the right to display its options below.
5. It is recommended to set the column display to *Primary and Secondary* if you have multiple percentage codes for each request.
6. Check the box for **Display percentages**.
7. Click **Save** and then click **Apply** to see your new View.

Percentage Coding for Ad Hoc Reports

All of the options available in Views will also be available for Ad-Hoc reports when you go to **Options > Report > Columns Tab**.

Select **Coding Sheet** as the category and then move a percentage coding enabled table to your columns grid.



Make sure to check the box for **Display percentages** on the bottom.

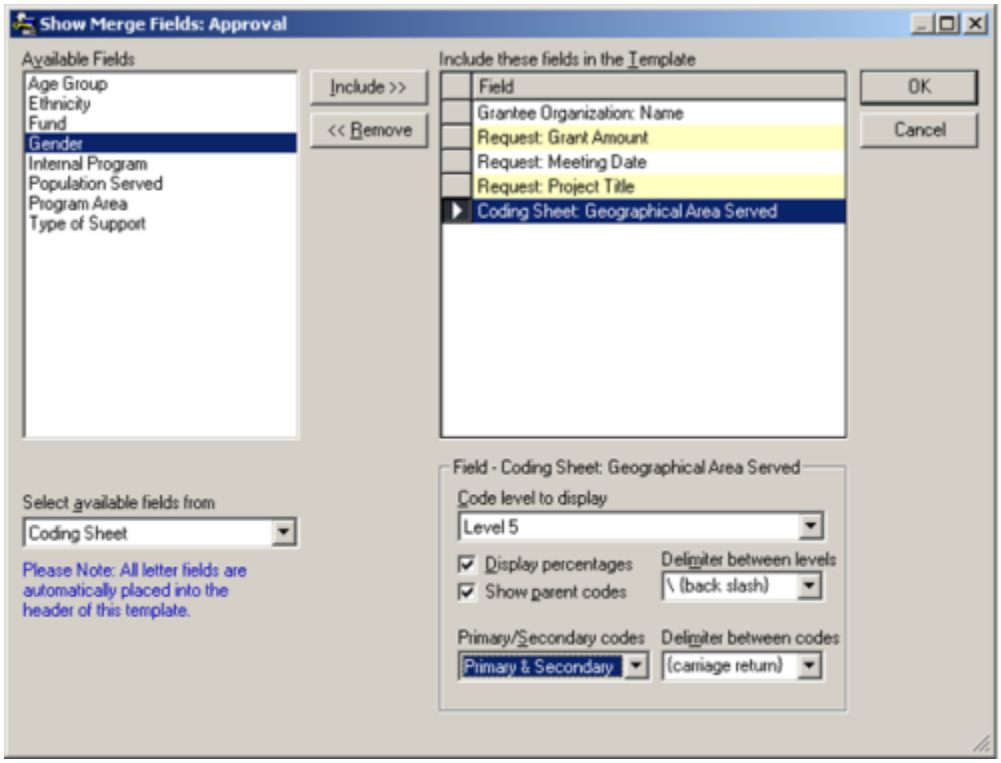
Sorting/Grouping Tab

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.

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.

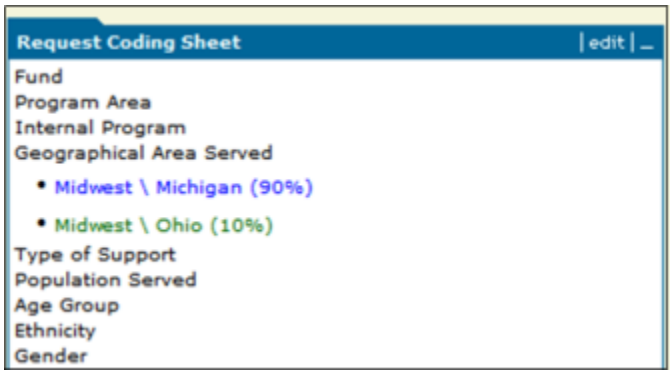
Percentage Coding in MyGIFTS and ReviewerCONNECT

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 Alta, 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.

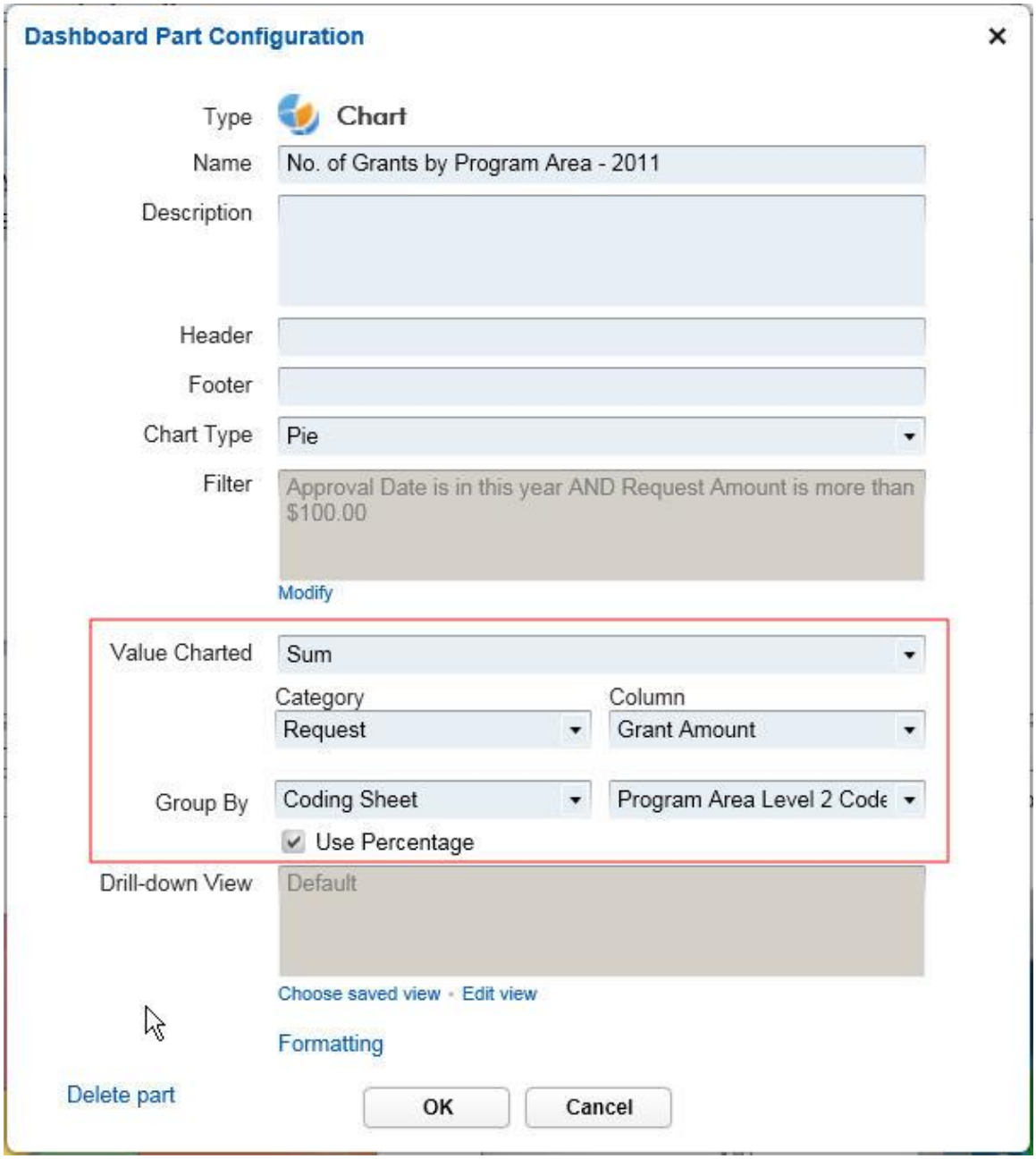
Percentage Coding in Charts

The Dashboard Charts support percentage codes.

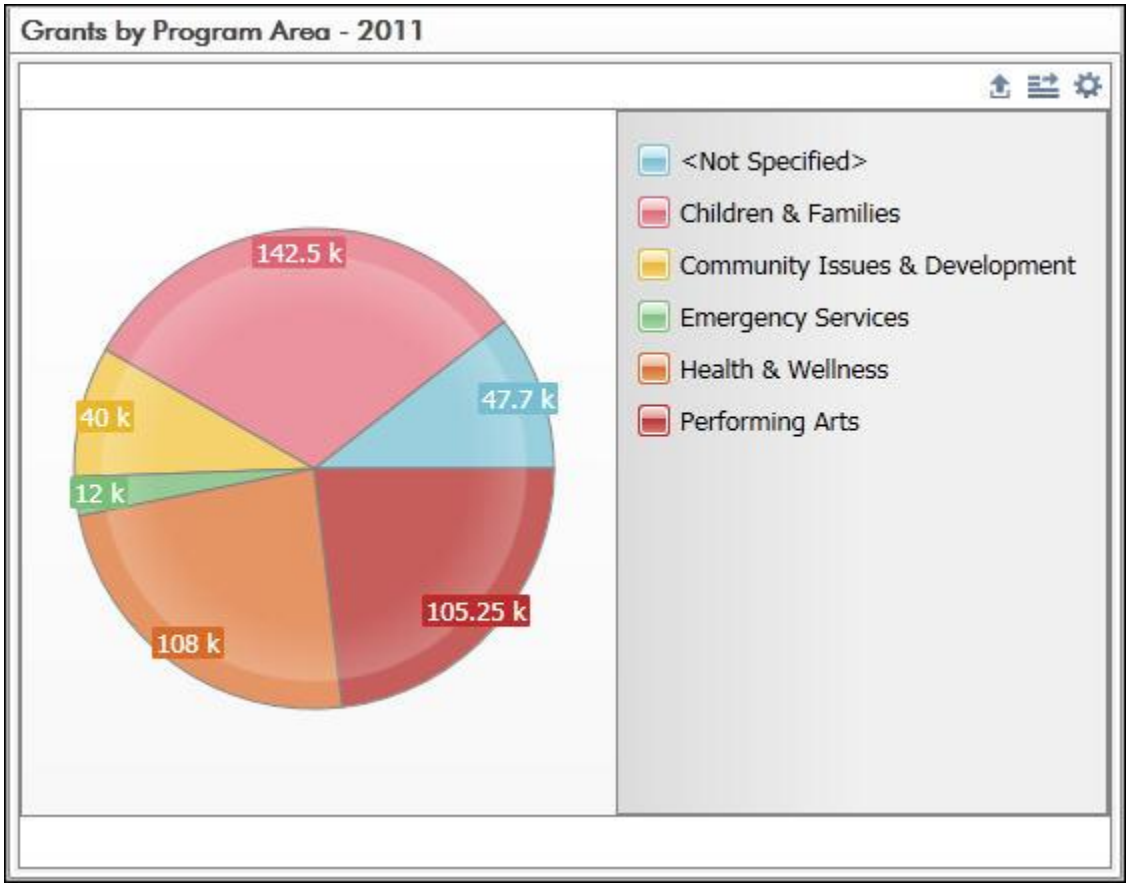
If you are grouping by a classification that is percentage enabled and are charting Request Amount or Grant Amount, a checkbox option will appear in the Chart Configuration form to **Use Percentages**.

NOTE: This option will not be visible if the **Value Charted** field is set to **Count**.

If this box 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 Coding in Batch Updates

The following rules to functionality apply to GIFTS Alta Batch Updates 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.

Working with Payments

This help topic describes how to create and manage the Payment Schedules for your Requests.

Searching for Payments

About Payments in the Workspace

Creating New Payments

Modifying Existing Payments

The Payments Edit Form

Canceling a Payment

Paying a Payment

Using Payment Holds

Using Payment Alerts

Voiding a Payment

Reissuing a Payment

Consolidating and Splitting Payments

Entering Refunds

Contingent Payments

Deleting a Payment

Uploading Payments to IGAM

Searching for Payments

You can search for Payments using any of the GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Payments.

To access the Payment filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Payments** Record type on the left.
4. Click the **More filter options** link in the lower right.

You can search for Payments using any combination of the following properties:

- **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 category/Reserve Fund:** 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.
- **Fund/Donor:** The Fund Donor code assigned to the Payment.
- **GL 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:** You can search by the City of the address to which the Payment was sent.
- **Payment Country:** Search by Country
- **Payment ID:** The system-assigned Payment ID number.
- **Payment is Not Expected:** Searches for Payments that have not been exported or, if you have the GIFTS Check Writer, printed.
- **Payment State:** Search by State.
- **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 by the Request ID number.
- **Request Reference No.:** Search by the Request Reference number.
- **Resolved/Committed:** 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.
- **Wire Transfer:** Searches for Payments that are or are not wire transfers.

About Payments in the Workspace

The following sections describe how you can access Payments in order to view and modify them.

The Payments in the Workspace

You can search for Payments in the **Payments** in the Workspace, or populate the Payments Related link with the Payments associated with a particular record—such as a Request record or Organization record—by selecting that record.

Default Sort: 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 Workspace, as described in Working with the Workspace. By default, the following information is displayed for Payments in the Workspace list:

- **Lock 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.
- **Alert:** A red exclamation icon will be displayed if there is an alert message set on the payment. Hover over the icon with your mouse to see the message.
- **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.
- **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.

NOTE: Payments are no longer color-coded to indicate their Status.

To view the details for a specific Payment, double-click it on the list in the Workspace or select it and go to **Actions > Open**. The Payment's Edit Form will then be displayed for your to review or modify.

A Request's Payment Schedule

To access the Payment Schedule for a specific Request, first select or open the Request through the Workspace. Then, click the **Payments** Related link. The Payment Schedule is displayed.

Payments are listed in date order, and the following information is displayed for each Payment.

- **Status/Date:** The current Status of the Payment and the date on which its Status last changed.
- **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. 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.
- **Fund/Notes:** Displays the Fund select and any Notes recorded for the Payment.

In addition, the information on the top summarizes the payment history of the Request.

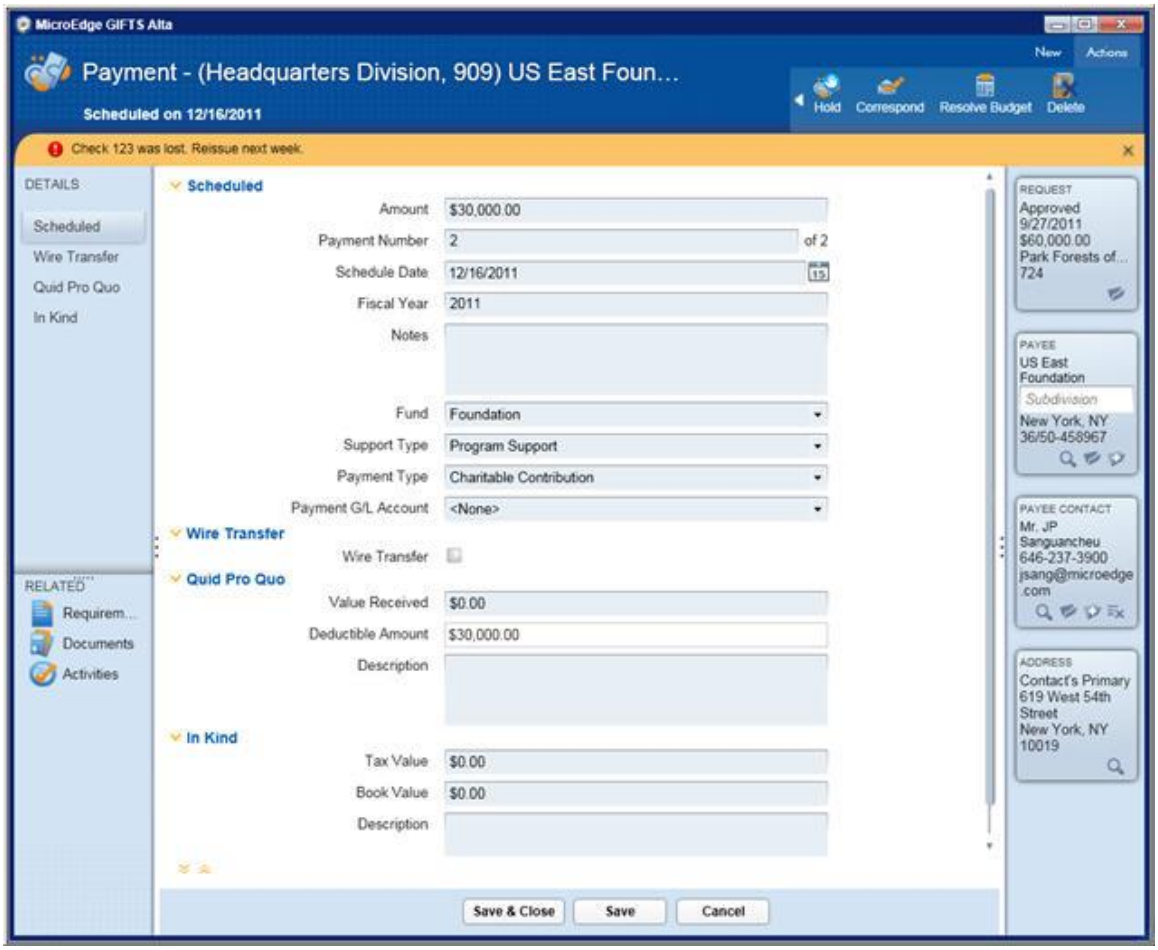
- **Awarded:** The total amount awarded for the grant.
- **Paid:** The amount paid, to date, on the grant.
- **Balance:** The unpaid amount of the grant.
- **Scheduled:** The total amount of scheduled Payments for the grant.
- **Unscheduled:** Any difference between the amount awarded and the amount 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 Canceled 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.

Using the Dashboard Calendar for Payments

Payments can also be viewed and modified from the Payments view of the Calendar. Please refer to the Calendar dashboard part section for more details.

The Payments Edit Form

The **Payments** Edit Form displays information after you have successfully searched for a Payment and double-clicked on the listed record on the search results page in the Workspace.



NOTE: If there is an alert set on the Payment, it will be displayed in an orange bar on top of the page below the header.

The Payment Edit Form contains the basic information for each Payment you add or modify.

By default, the following information is available on the Payment's Edit Form:

Related Links:

- Requirements
- Documents
- Activities

Primary Relationship Cards:

- **Request** - displays information about the Request this Payment is related to.
- **Payee** - displays the associated Payee Organization information.

- **Payee Contact** - displays the Primary Contact which defaults from the Request record.
- **Address** - defaults to the Primary Contact's mailing address unless modified using the Search icon on the card.
- **Budget** - If you have the optional Budget Module installed, some Payments will be related to items in the budget. For this purpose, a Budget card will appear on the Primary Relationship section of the form.

Details Sections:

The Scheduled Section

- **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.
- **Payment Number:** 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 Canceled Payments—it is the total number of Payments that are actually being made.
- **Schedule Date:** The date on which the Payment is scheduled to be paid. This information is required.
- **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.

  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.

- **Notes:** Any notes pertaining to the Payment.
- **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.
- **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.
- **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.
- **Payment 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.

Paid

NOTE: This section will be hidden unless the Payment status is Paid, Void, or Refund.

- **Date Paid:** displays the date the payment was issued.
- **Check Number:** displays the check number of the payment.
- **AP Invoice Number:** displays the invoice number.
- **Check Cleared Date:** displays the date the check cleared.

Currencies

NOTE: This section only appears if you have the Track Local/Other Currencies option enabled in the Administrator module's Preferences.

- **Functional Amount:** defaults to the Payment Amount.
- **Local/Other Currency:** When the currency is selected, the various Rate Date and Exchange Rate default into the field below based on the Exchange Rate table set up in the Administrator module.
- **Rate Date:** defaults from the Exchange Rate table.
- **Exchange Rate:** defaults from the Exchange Rate table.
- **Local/Other Amount:** calculated as the Functional Amount multiplied by the Exchange Rate.

The Wire Transfer Section

If the **Wire Transfer** box is checked, the payment will be sent via wire transfer to the bank(s) entered for the related Organization. Simply check the box and all the bank information from the Organization record will be added to the Payment edit form.

For full details of the Wire Transfer section, refer to the Organization's Wire Transfer section.

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.

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 (for Organizations) and Payments: Wire (for Requests).

NOTE: Your GIFTS 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.

The Quid Pro Quo Section

NOTE: This section is hidden unless the **Capture Quid Pro Quo information in payment form** option is enabled in Admin Preferences.

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 GIFTS 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.

- **Value Received:** The value of the product or service received.
- **Deductible Amount:** The total amount of the donation. This amount is taken from the **Amount** field of the **Scheduled** section, and cannot be edited.
- **Description:** A description of the product or service received.

The In Kind Section

NOTE: This section is hidden unless the **Capture In-kind information in payment form** is enabled in Admin Preferences.

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).

- **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.

NOTE: Additional sections may be visible if you have optional modules installed such as the Customizer.

Modifying Existing Payments

Opening an Existing Payment

To open an existing Payment, do either of the following:

- In the Workspace, search for the payment in the Workspace and then double-click to open it or select it on the Workspace and go to **Actions > Open**.
- In the Workspace, open the associated Request record. Then, click the Related Payments link. Double-click the payment to open its edit form.

Now you can edit the information on the Payment Edit Form.

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
- Contingent Payments

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 **Search** icon on the Primary Relationship Card. 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.

- If your GIFTS 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 *GIFTS Administrator's Guide*.
- If by adding this Payment you have scheduled Payments totaling 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. If you do not wish to amend the grant, click **No** to cancel the creation of or changes to the Payment.

Creating New Payments

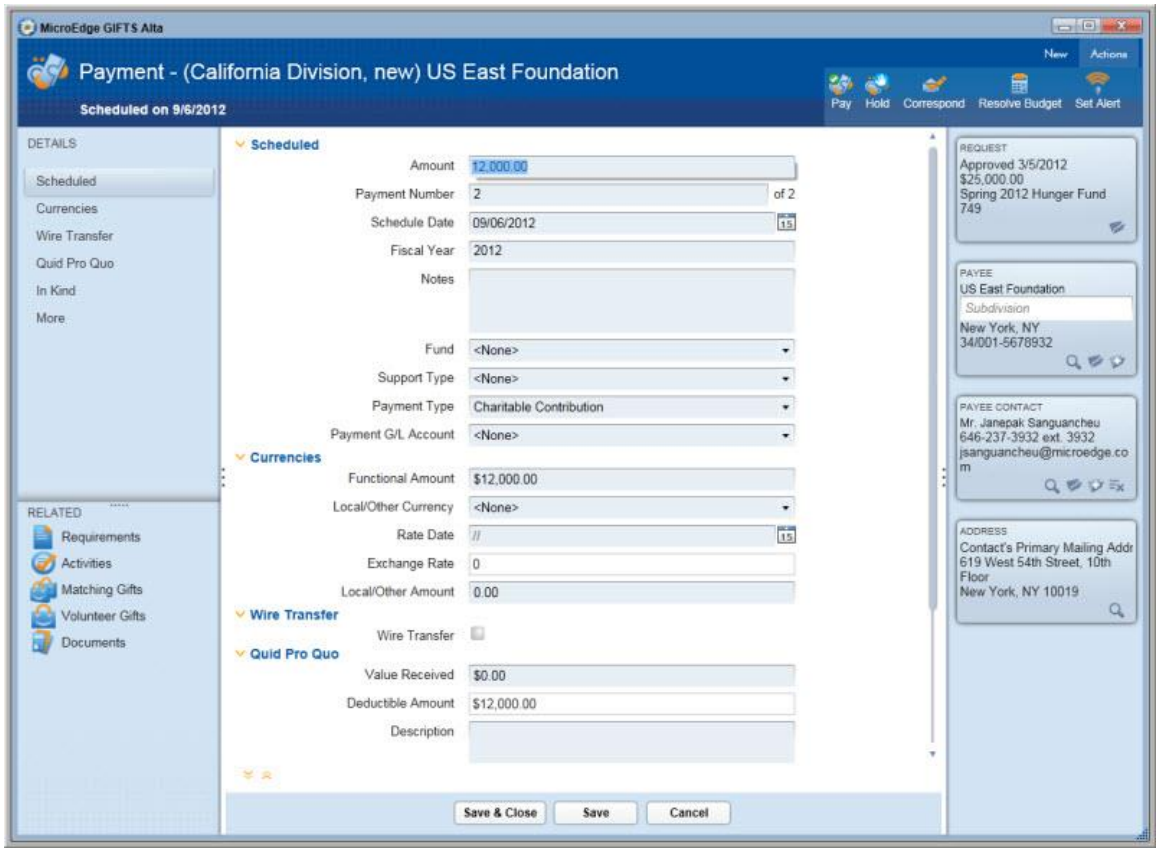
GIFTS Alta will automatically take you through the process of creating and scheduling payments when a Request is approved. However, there may be times when you need to schedule payments manually.

The following sections describe how to create new Payments for one or more Requests.

Scheduling New Payments for One Request

To create new Payments for one Request, do the following:

1. After doing a Requests search or going to a Related Requests list, double-click on the Request for which you want to create a Payment.
2. When the Request edit form opens, go to New > Payment in the ribbon menu to open the new Payment edit form.
3. Fill in the fields as necessary.



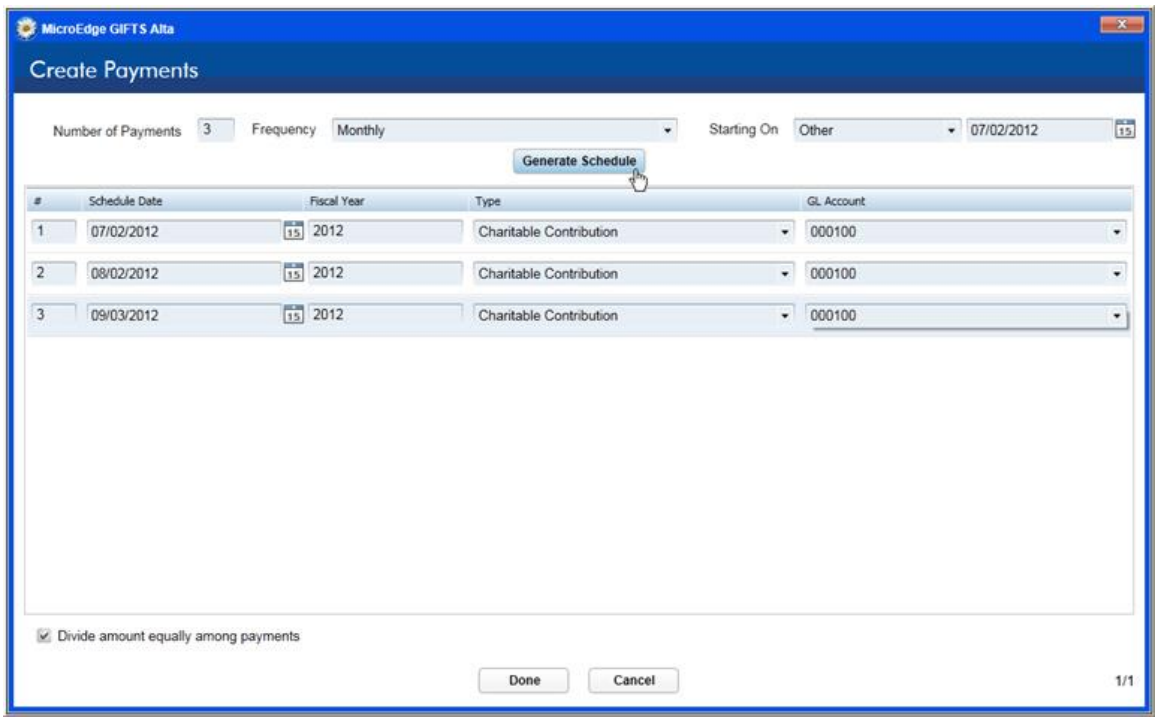
4. Click **Save & Close** when done.

Scheduling New Payments for Multiple Requests

To create new Payments for multiple Requests, do the following:

1. After doing a Requests search or going to a Related Requests list, select the Requests for which you want to create new Payments.
2. Go to **Actions > Create Payment** in the ribbon menu to open the Create Payments form.

Note: All Requests selected must have the same disposition of Pending or Approved.



3. Select the **Number of Payments** you wish to schedule and the **Frequency** between each payment (Monthly, Bi-monthly, Quarterly, etc.).
4. In the **Starting On** field, specify the date (Request Date, Project Start Date, Other, etc.) that will be used as the basis for scheduling the first Payment. This will be considered the first payment date.

   Note: Your options for choosing a date vary according to the Disposition of the Request and by the available data . The Approval Date and Project End Date are only available for Approved Requests. Likewise, the Request's Meeting Date is provided as an option only when one has been specified for that Request.

5. Click the **Generate Schedule** button to have GIFTS Alta calculate the payment dates and list them in the section below.
6. Select the default **Payment Type** and **General Ledger Account** codes to be applied to all of the Payments.
7. If you would like GIFTS Alta to calculate the payments to the nearest whole number, uncheck the **Divide amount equally among payments option**.
8. Click **Done** to have GIFTS Alta update the Requests with the new payments.
9. At the Create Schedule complete message, click **OK**.
10. The Create Schedule results window will display all successes, errors, and warnings. You may **Print** or **Save** this list for later review.
11. Close the window when done.

If any of the Request's Payments have been Paid, GIFTS Alta asks if you wish to add a **Scheduled Payment** or a **Refund**. Click the option to create a Scheduled Payment, then add Payment information.

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.

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 **Actions > 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 **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:

- Paying a Payment from the Workspace
- Paying a Payment from the Dashboard
- Paying a Batch of Payments

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.

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 Workspace

You can mark a Payment as Paid from the Workspace without having to open its Payment edit form.

NOTE: If you want to enter or edit wire transfer information for the Payment, you must open the Payment record and pay it in Payment record.

To pay the Payment:

1. Search for the Payment and select it in the Workspace.
2. Go to **Actions > Pay** to open the Pay Payment form:
    - **Payment Date:** defaults to today's date.
    - **Check Number:** The check number of the Payment. This is optional.
    - **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.
    - **Date Cleared:** enter the date you expect the check to clear.
    - **Notes:** any relevant notes about the Payment.
3. Click **OK** to complete the Pay process. You should get a *Mark as Paid completed successfully* message.

Paying a Payment from the Dashboard

If you have Dashboard parts(Calendar, Table, etc.) that display Payments, you can Pay a Payment through the Dashboard.

Simply double-click the listed Payment to open the edit form and then go to **Actions > Pay**.

Paying a Batch of Payments

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 mark a batch of Payments as Paid:

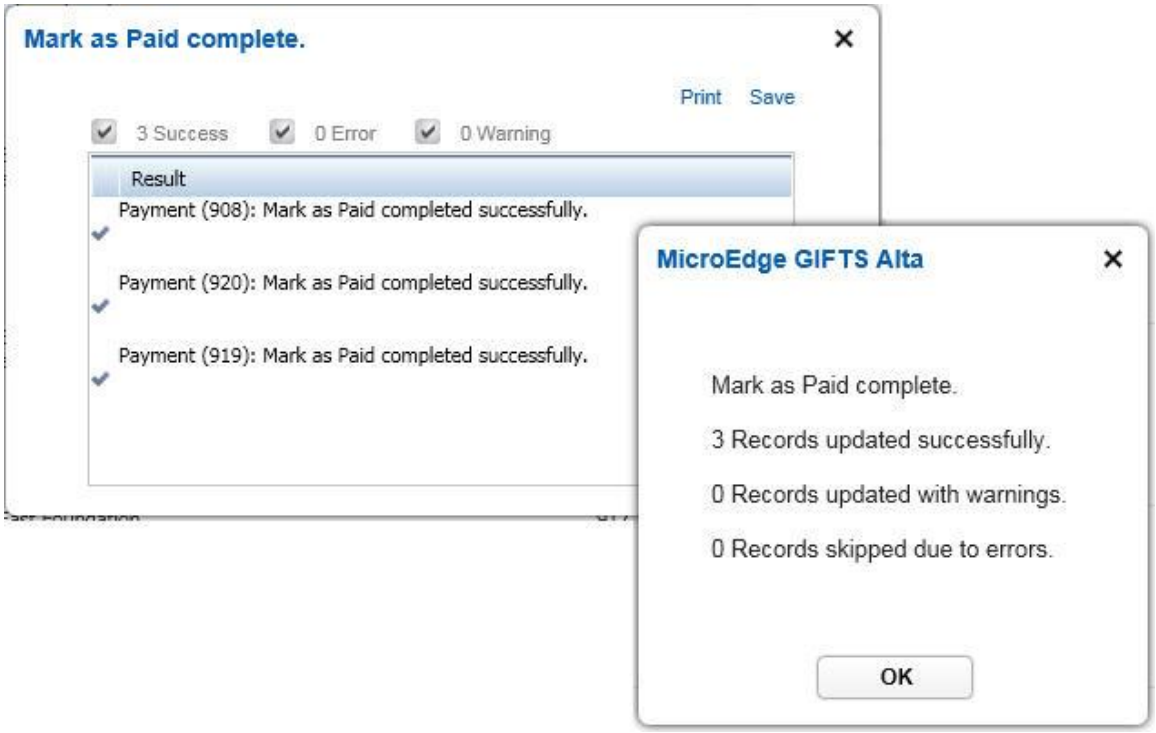
1. Use a search to display the Payments in the Workspace and select the Payments that you wish to process using the checkboxes. To highlight more than one Payment, press CTRL or SHIFT as you click on the Payments, or press CTRL+A to select all of the Payments.

2. Go to **Actions > Pay**. (If this selection is disabled, check your batch to be sure it contains only Scheduled Payments.)
3. Enter the following information:

Payment Date: 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.

4. Click **OK** to begin the processing. As the system processes the batch, GIFTS displays a log of the results.



5. Click **OK** at the completion prompt.
6. 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**.
7. Click **X - 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. Search for the Payment and either select it in the Workspace or open it's edit form.
2. Go to **Actions > Hold**. The Status of the Payment is changed to Hold.

To remove the hold, 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 grant amount.

If your GIFTS 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.

NOTE: Voiding can only be done on Paid Payments individually.

To void a Payment:

1. Open the Payment edit form.
2. From the ribbon menu, choose **Actions > Void**. The Voiding Payment prompt is displayed.
3. If you want to reissue the payment, check the **Issue a replacement Payment** box.
4. You are asked to confirm that you want to void the Payment.

   Click **Yes** to void the payment.

   Click **No** to cancel out of the void process.

   If you click **Yes**, the payment is voided and a new Payment record is opened for the reissue Payment.
5. Click **Save and Close** to save the voided Payment.

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 edit form.
2. From the Payment menu, choose **Actions > 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.

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 and add a second one for a smaller amount. Alternatively, you could cancel the Payment and then create two new payments.

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.

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.

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. Open the Request record's edit form.
2. Go to **New > Payment**.

   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** and click **OK**.

   A new Payment record is displayed with the words **Refunded On** in the header.

2. Enter the Refund information in the available fields described below.

   Amount: The amount of the refund. This information is required, and is always a negative amount.

   Schedule Date: The date on which the refund was received. This information is required.

   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.

   Notes: Any notes pertaining to the refund.

   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: If your GIFTS administrator defined a default Payment Type, it is displayed here. If the default does not apply to this Refund, select another from the list.

   Payment 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 GIFTS 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.

   Date Paid: The date of the refund check.

   Check Number: The check number of the refund. This field is not available if the Wire Transfer option is on.

   Wire Transfer: If the refund is made by wire transfer, click this option and enter or modify the wire transfer information.

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**. 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**.

In GIFTS, Payments with a Status of Contingent cannot be marked as Paid until its contingency Requirements are marked as Done.

Click here for more information on Payment Requirements.

Using Payment Alerts

Setting up an alert for a Payment works the same way as it does in an Organization or Request record.

1. Search for the Payment record and open it's edit form.

   Note: The Set Alert menu option will only be available on the record's edit form.

2. Go to **Actions > Set Alert** and the orange alert bar will be displayed .
3. Click in the orange bar where it says **<Type alert message here>** to open the text entry field.
4. Enter your message and press **Tab**.
5. The alert message is now set.

To remove the alert, click the **X** on the right side of the message bar.

Deleting a Payment

If 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.

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 instead.

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 ribbon menu, choose **Actions > 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. Otherwise, click **No** to continue. The Payment is deleted.

Uploading Payments to IGAM

For users with IGAM 5 or later an Upload Payments to IGAM function is available to users who are members of the Admin group.

The **Upload Payments** 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 Canceled 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 Canceled, 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 nonzero Void_ID, the IGAM server deletes any copy it might have (original record is no longer displayed).

Update Selected Payments

1. Search for the Payments in the Workspace and select the ones you wish to upload to IGAM.
2. Go to **Actions > Upload to IGAM** and the system will ask if you want to upload the statuses of the selected Payments to IGAM. **Yes or No**.
    - Click **Yes** to begin the upload process and display the progress log.
    - Click **No** to exit from the process without uploading any statuses.
3. The system will display a message when complete. Click **OK**.
4. Review the Progress Log for any warnings or errors while uploading. You have the options to **Print** or **Save** the log.

5. Click the **X** in the upper right to close the log when done.

Update All Payments Since Last Upload

To 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) go to the User Menu and select the **IGAM > Upload Payments** option.

This action will also delete Payments from the My Account pages that were previously created and then deleted in GIFTS.

Multi-Currency in Requests and Payments

This section explains how to track Request and Payment amounts in another currency, using exchange rates stored in the GIFTS Administrator Module.

Local/Other Currencies in Requests

Local/Other Currencies in Payments

Adding or Modifying Currencies in Requests

Working with Multi-Currency Requests

Working with Multi-Currency Payments

Local/Other Currencies in Requests

This section describes where to find multi-currency information within a Request record.

By default, GIFTS displays amounts 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.

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.

The Request Currencies Section

Most of a Request's local/other currency information is found in the Currencies section of the edit form.

The following options and information appear here:

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.

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. 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 Related Payments

There are two things to note about the Payments tabs of Requests when you are using GIFTS multi-currency features.

In the Payment Summary

Your GIFTS administrator may choose to make *local/other* amounts the primary display currency in the Admin Preferences. If he or she has, the Payment Summary area of the Payments tab will list local/other amounts (instead of the default functional amounts).

In the Currencies Section

The Payment edit form will also display a Currencies section which 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.)

On Related Activities

The Grant Approval will be listed in the Related Activities list with the Grant amount of the other currency entered in **Notes**.

Your GIFTS administrator may have chosen 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

Multi-currency information will appear in Payment records:

The Payment Edit Form

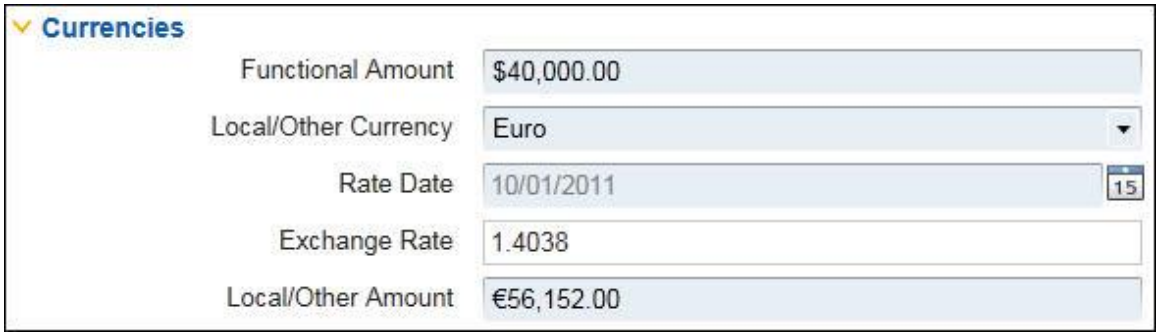
GIFTS by default displays amounts on the **Payment** tab of a Payment in your *functional* currency. However, your GIFTS administrator has the option to make Payments show **Amount** using the *local/other* amount in that currency.

By default, the first tab of a Payment displays all amounts in your functional currency.

However, if your multi-currency options specify that the local/other currency is the primary display option, the Payment amount will show in the other currency.

The Currencies Section

Key multi-currency data and functionality for Payments is found on the **Currencies** section.



The fields shown here are described in The Payments Edit Form.

For now, we will note some general information about the uses of the **Currencies** fields:

- When adding or modifying a Payment, the **Functional Amount** can be entered here, or in the **Scheduled - Amount** field. 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.

Auto Activities Creation

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 Activity records, zoom on the Payment in the Workspace, then switch to the Activities tab.

Adding or Modifying Currencies in Requests

This section discusses some of the reasons why you may want to Add or Modify Currencies in a Request.

Local/Other Currencies in Requests 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:

- If this is the case, the **Currency** field also appears in the **Request** section. The default local/other currency selected in the Administrator Module is displayed. If you 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 **Local/Other Currency**, **Requested Amount**, and **Recommended** amounts fields automatically populate the same fields on the **Currencies** section.

- If your functional currency is the primary display currency, the **Local/Other Currency** field does not appear in the Request section. Data in the **Requested** and **Recommended** amounts fields automatically populate the same fields on the **Currencies** section. If you want to add a local/other currency to the Request, you can do so on the **Currencies** tab.

Currencies Section

On the **Currencies** section 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 on the **Currencies** section.

The following options are available on the Currencies section:

- 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.

- 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.

Note: 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 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. **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:

- 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.

  Click here for a discussion of these possibilities and their implications.

- 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 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.

- 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.

Reasons to Adjust Amounts

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 **Currencies** section. 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.

The topics below discuss multi-currency tasks related to the following Request actions:

- Approving a Multi-Currency Request
- Renewing a Multi-Currency Grant
- Amending a Multi-Currency Grant
- Approving a Batch of Multi-Currency Requests

Approving a Multi-Currency Request

If you are approving a Request with Multi-Currency enabled, you will notice additional fields on the first page of the Approve Wizard.

NOTE: These options are displayed no matter what the primary display currency is.

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

See Local/Other Currencies in Requests for more details about the above fields.

After verifying the data on the first page and clicking Next, the following additional options will be available on the Payments Schedule page. (Approve page 2)

Select from the following options:

- 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.

- 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.

You can now click **Finish** to approve the Request or **Next** if you have the optional Budget Module installed.

Renewing a Multi-Currency Grant

Renewing Grants 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 describes the process of amending a grant. If the grant has a local/other currency specified, multi-currency options will be 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:

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 describes the complete process of batch processing Request approval. The process will be exactly the with the exception of the additional multi-currency fields described above.

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.

When working with a second currency in Payments, you will be working in the Currencies section. There you can add a local/other currency, or modify a currency that's been added.

Care must be taken when adjusting Payments' local/other currencies; in certain circumstances it could affect the Payment amount, and thus the grant amount. Click here for reasons when you might want to make changes to a multi-currency Payment.

The Payment Currencies Section

The Currencies section 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

Scroll down to the Currencies section, 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 **Currencies** section of Payments:

- 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. Click here for a discussion of these possibilities and their implications.

- 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.

- 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 below.

Reasons to Adjust Amounts

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 go to the Currencies section.
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.

  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: 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 the *GIFTS Administrator's Guide*.

Working with Requirements

This help topic describes how to assign and manage Requirements like progress reports and payment contingencies. Requirements can be assigned to either Requests or Payments.

Searching for Requirements

About Requirements in the Workspace

The Requirements Edit Form

Adding and Modifying Grant Requirements

Adding and Modifying Payment Requirements

Assigning Staff to a Batch of Requirements

Marking Requirements as Done

Deleting Requirements

Sending an Online Requirement to a Grantee

Requirement Resubmissions

Creating an IGAM Account for a Grantee

Searching for Requirements

You can search for Requirements using any GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Requirements.

To access the Requirements filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Requirements** Record type on the left.
4. Click the **More filter options** link in the lower right.

You can search on any combination of the following properties.

- **Branch:** If Branch security is enabled, you will be able to search by branch using this filter.
- **Class and Type:** The Type of Requirement, such as Final Report or Signed Contract.
- **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:** Search by requirement form title.
- **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.
- **Request ID:** The unique, system-generated ID number of the Request with which the Requirement is associated.
- **Request References Number:** Search by Request reference number.
- **The Request Type and Status**—such as 'Cash Grants'—to which the Request belongs, and its status.
- **Requirement ID:** Search by the Requirement ID number.
- **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.
- **Retrieve Date:** Search by the date the Requirement was retrieved from IGAM.
- **Staff:** The member of your staff assigned to the Requirement.

About Requirements in the Workspace

There are several ways to access Requirements in order to view and modify them.

Accessing Requirements in the Workspace

To view Requirements in the Workspace, you can do one of the following:

- If Requirements is set up as a Record Type option, you can use the Quick Find.
- Click **Full search**, and then use the Query Builder to search for the Requirement(s) needed.
- Select a Request or Payment that you want to focus on in the Workspace . The Related Requirements link will display the number of related Requirements records. Click the **Requirements** link to see a list.

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 Workspace. By default, the following information is displayed in the Related Requirements list.

- **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.

NOTE: The listed Requirements are not color coded in GIFTS Alta.

Accessing Requirements in a Request or Payment

To view Requirements from within a Request or Payment, open the record and click on the Related **Requirements** link. 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.

- **Type:** The Type of Requirement, such as 'Final Report' or 'Signed Contract.' These are defined by the GIFTS administrator.
- **Requirement Due:** The date range in which the Requirement Due Dates fall, such as 'Within 2 weeks' or 'Within 6 months.'

The Requirements Edit Form

The **Requirements** Edit Form displays information after you have successfully searched for a Requirement and double-clicked on the listed record on the search results page in the Workspace.

NOTE: If there is an alert set on the primary related Request, Organization, Payment, or Contact, it will be displayed in an orange bar on top of the page below the header.

The Requirement Edit Form contains the basic information for each Requirement you add or modify.

By default, the following information is available on the Requirement's Edit Form:

Related Links:

- Documents

Primary Relationship Cards:

- Organization
- Request
- Payment
- Contact

Details Sections:

Requirement:

- **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 GIFTS administrator.
- **Due Date:** The date on which the Requirement is due.
- **Received Date:** 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.
- **Long Notes:** If you wish to record additional information about the Requirement

Online:

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.

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.

There are several ways to create a new Requirement for a Request:

- Select **New > Requirement** from the ribbon menu.

  Using the method above, you will open a new Requirement with no Primary Relationship information entered. You can enter that information yourself using the Search icons in each card.

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 Workspace, select the Request. Then, go to **New > Requirement** in the ribbon menu.
- From the Workspace, open the Request. Then, go to **New > Requirements** in the ribbon menu.

To modify an existing Requirement:

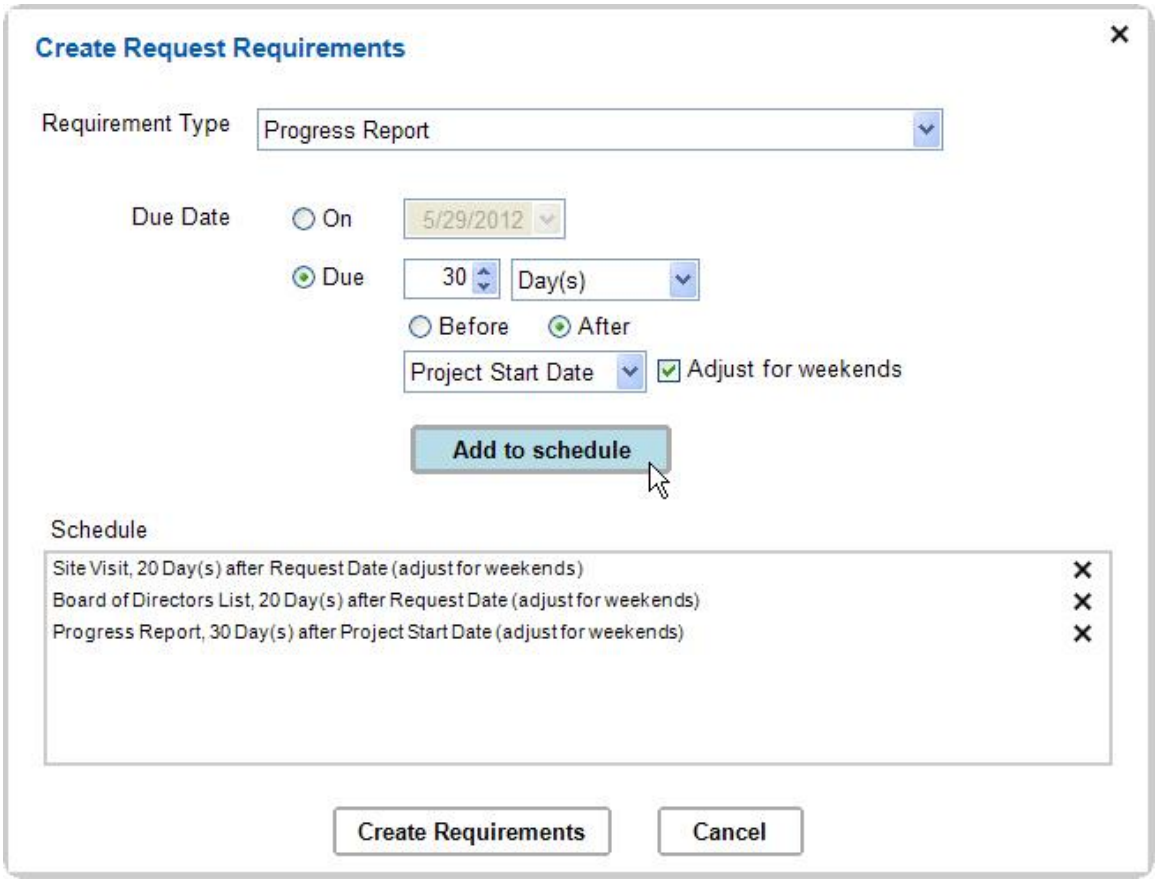
- In the Workspace, select the Request. Then, go to the Requirements Related link. Select the Requirement and choose **Actions > Open** or just double click on the Requirement listed.

When you are finished working with the Requirement, click **Save and Close**.

Batch Requirements for Requests

To create Requirements for a batch of Requests:

1. After searching for Requests or going to a Related list for Requests, select the records that you want to update. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)
2. From the **Actions** menu, select **Create Requirements**. The options for creating Grant Requirements are displayed.



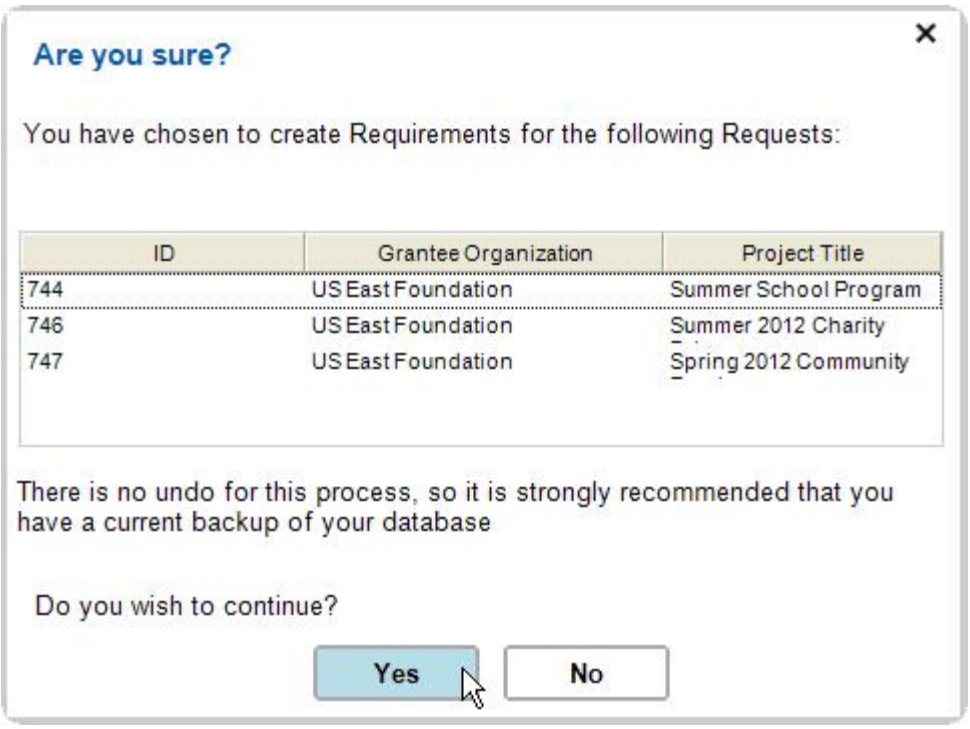
3. In the **Requirement Type** field, select the type of Requirement you would like to add. (Site Visit, Final Report, etc.)
4. Specify the **Due Date** for the Requirements. You can choose a specific date, or a date relative to the workflow of each Request.

   Example: If you are setting up requirements for final reports, you can specify that they be due 30 days after the Project End Date. GIFTS sets the due dates based on the Project End Date of each Request.

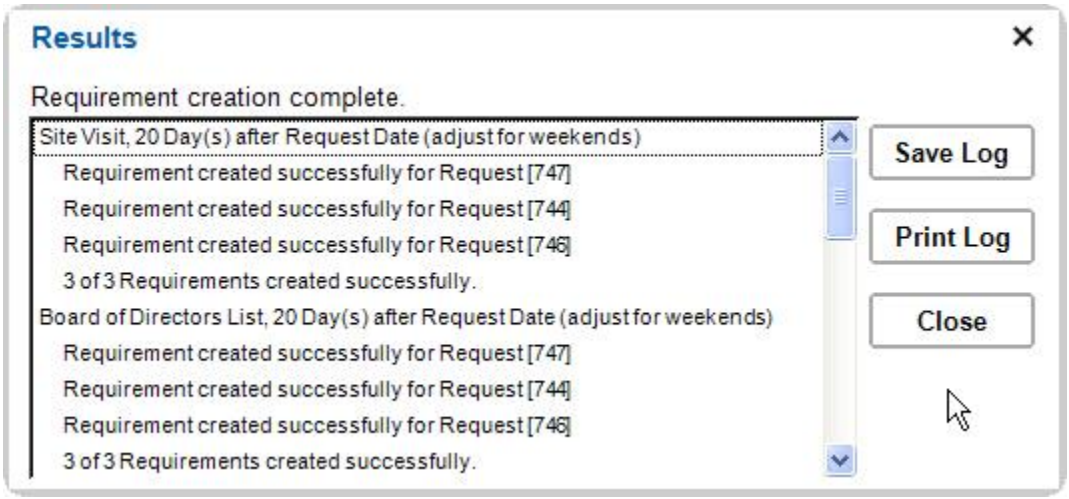
5. If you specified a relative date and you do not want any requirements to be due on a weekend, select the **Adjust for weekends** option.

   Example: If the 30th day after the End Date of a project falls on a Saturday, GIFTS will move the due date to the preceding Friday. If it falls on a Sunday, GIFTS will move it to the following Monday.

6. Click **Add to schedule** to create the Requirement. It is displayed in the Schedule list below.
7. Repeat Steps 3-6 to add any additional Requirements for the Requests.
8. If you decide not to create one of the Requirements in the grid, you can click the **X** icon to remove it.
9. Click the **Create Requirements** button. GIFTS Alta displays a list of the Requirements that will be created, and prompts for confirmation that you wish to continue.



10. Click **Yes** to continue. The system displays a log of the processing results and a confirmation message.
11. Click **OK** to close the Requirement Creation Complete message. The process log remains open.



12. You can click **Print Log** or **Save Log** to print or save a copy of the results log. When you are finished reviewing the log, click **Close**.

Adding and Modifying Payment Requirements

You can also create Requirements for individual Payments. When you add a Requirement for a Payment, you 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 Related link, select the Payment you are making Contingent, and go to **New > Requirement**.

   - Open the Payment record and go to **New > Requirement**.

   - In the Workspace, select the Payment and go to **New>Requirement** from the main menu.

   A new Payment Requirement edit form is displayed.

2. Enter the Requirement information.

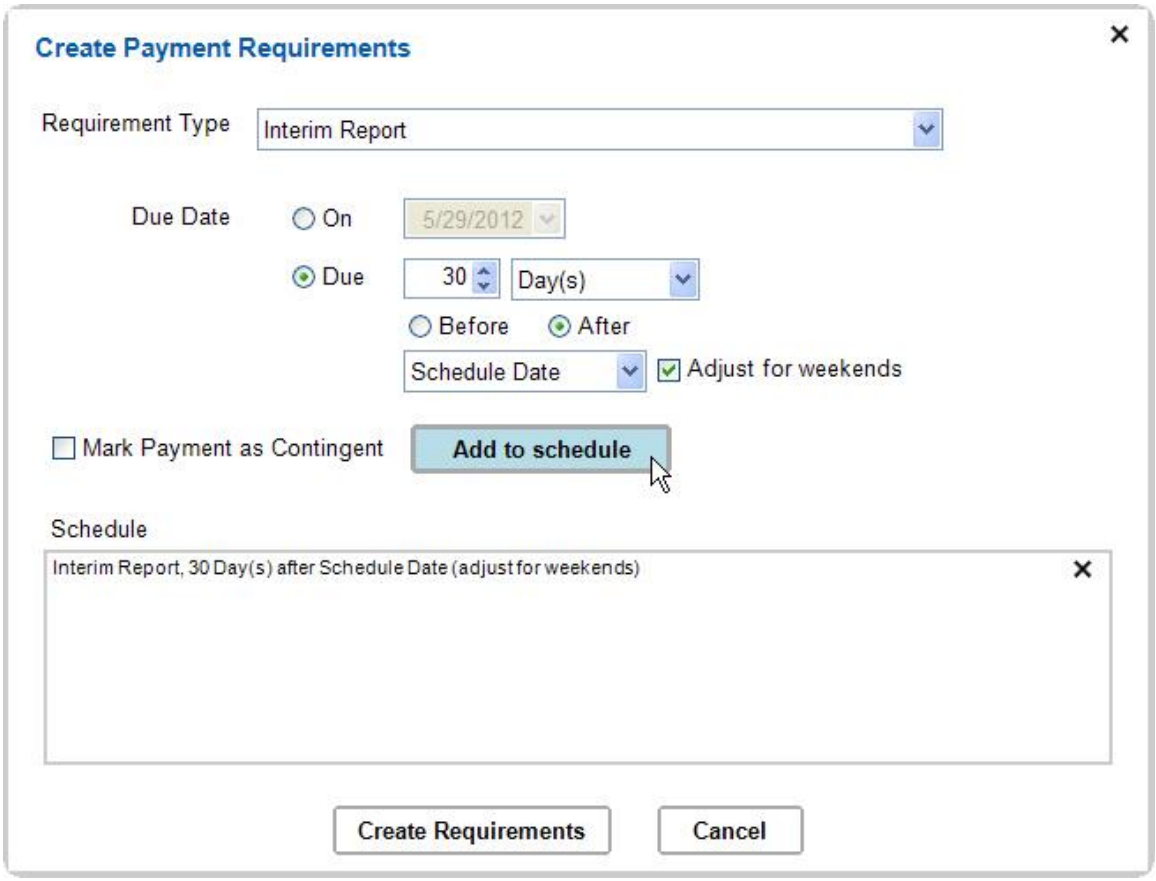
3. Click **Save and Close** to save the Requirement. If you chose to mark the Payment as Contingent, a message notifies you that this has been done.

To modify an existing Payment Requirement, you can access it from a Requirements search results list on the Workspace, the Requirements list of the Request, or the Requirements list of the Payment.

Batch Requirements for Payments

To create Requirements for a batch of Payments:

1. After searching for Payments or going to a Related list for Payments, select the records that you want to update. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)
2. From the **Actions** menu, select **Create Requirements**. The options for Create Payment Requirements are displayed.



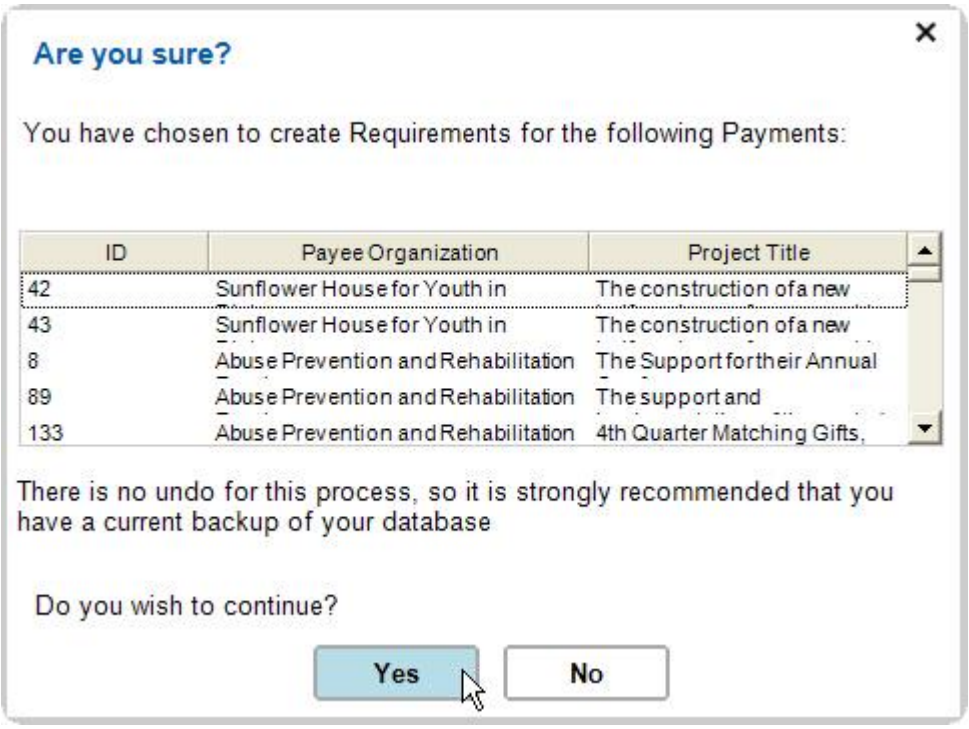
3. In the **Requirement Type** field, select the type of Requirement you would like to add. (Interim Report, Signed Contract, etc.)
4. Specify the **Due Date** for the Requirements. You can choose a specific date, or a date relative to the workflow of each Request.

   Example: If you are setting up requirements for signed contracts, you can specify that they be due 21 days before each Payment's Schedule Date. GIFTS sets the due dates based on the Schedule Date of each Payment.

5. If you specified a relative date and you do not want any requirements to be due on a weekend, select the **Adjust for weekends** option.

Example: If the 21st day before a Payment's Schedule Date falls on a Saturday, GIFTS will move the due date to the preceding Friday. If it falls on a Sunday, GIFTS will move it to the following Monday.

6. Select the **Mark Payments as Contingent** option if you want to ensure that the Payment will not be Paid until the Requirements have been marked as Done.
7. Click **Add to schedule** to create the Requirement. It is displayed in the Schedule list below.
8. Repeat Steps 3-7 to add any additional Requirements for the Requests.
9. If you decide not to create one of the Requirements in the grid, you can click the **X** icon to remove it.
10. Click the **Create Requirements** button. GIFTS Alta displays a list of the Requirements that will be created, and prompts for confirmation that you wish to continue.



11. Click **Yes** to continue. The system displays a log of the processing results and a confirmation message.
12. Click **OK** to close the Requirement Creation Complete message. The process log remains open.
13. You can click **Print Log** or **Save Log** to print or save a copy of the results log. When you are finished reviewing the log, click **Close**.

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 the Query Builder 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 Workspace, select the records you want to change.
2. From the ribbon menu, choose **Actions > 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 GIFTS 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.

Requirements can be marked Done one at a time or in a batch. You can also re-open a Requirement which has been previously marked Done.

Marking a Single Requirement as Done

If you are working with Requirement in the Calendar view or you have highlighted a Requirement in the Workspace, 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 Related Requirements link to display its Requirements Schedule. Then, select the Requirement or double-click it to open it's edit form and go to **Actions > Mark as Done**.

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 edit form and go to **Actions > Mark as Done** ribbon menu. 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 Workspace and choose **Actions > Mark as Done** from the ribbon menu. GIFTS will prompt you for a **Done Date**, as well as any **Notes** you would like to add. Enter a different **Done Date** in the confirmation window.

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.

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 to display them in the Workspace grid and select the Requirements that you wish to process.

To select 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 Workspace, select all of the Requirements you wish to mark as Done.
2. From the main menu, choose **Actions > 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. Click **OK** for the completion prompt.
6. Check the log to verify that all of the Requirements were processed, and note any discrepancies. You can click **Print** or **Save** to keep the log for your records.
7. Click **X** to exit the log.

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 and go to **Actions > Mark as Not Done**. The status returns to Open, and the **Done Date** is deleted.

Deleting Requirements

You can delete a Requirement at any time. The associations of the Requirement with any Organization, Contact, or Requests are eliminated.

NOTE: The only item deleted is the Activity record.

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 must first use the **Delete from Web** option. For more information about the Publish to Web feature, see Sending an Online Requirement to a Grantee or "Sending Online Requirements from GIFTS" in the IGAM User's Guide.

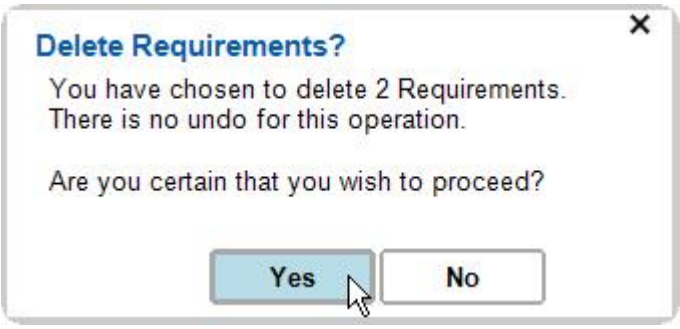
To delete a Requirement:

1. Open the Requirement edit form.
2. Go to **Actions > 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.

Deleting a Batch of Requirements

To delete a batch of Grant Requirements or Payment Requirements:

1. After searching for Requirements or going to a Related Requirements list, select the records that you want to update. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)
2. From the **Actions** menu, select **Delete**. GIFTS prompts for confirmation that you wish to continue.



3. Click **Yes** to continue. Requirements Plus displays a log of the processing results and a confirmation message
4. Click **OK** to close the confirmation message. The process log remains open.
5. You can click **Print Log** or **Save Log** to print or save a copy of the results log. When you are finished reviewing the log, click **Close**.

Sending an Online Requirement to a Grantee

NOTE: This feature is for IGAM users only.

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.

To send an online requirement to a grantee:

1. In GIFTS Alta, select the Request that contains the Requirement for which you want to collect requirement data.
2. Click the Requirements Related link 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.

   You can send online requirements in batch by selecting multiple Requirements, and then selecting **Actions > 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 in the *IGAM User's Guide*.

4. Select the requirement form you want to send to the grantee from the drop-down menu.

   Note: 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.

4. 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 in the *GIFTS Alta User's Guide*.

5. Click **OK**.

   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 In-Progress 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 Grantee 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 Alta may be included.

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 Alta, 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 Grantee Account option is not available.

2. From the Actions menu, select **Create Grantee Account**. The Create Grantee Account window appears.

   Note: If you are using the multiple sites functionality, the Create Grantee 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” in the IGAM User's Guide.

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.

Working with Contacts

In much the same way that you maintain a business card file on your desk, GIFTS can help you keep track of all of the people with whom you work. This help file describes how to use the Contact tracking features of GIFTS.

Searching for Contacts

About Contacts

The Contacts Edit Form

Adding and Modifying Contacts

Using Contact Alerts

Deleting Contacts

Exporting Contacts to Outlook

Searching for Contacts

You can search for Contacts using any of the search techniques described in Searching for Data in GIFTS.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Contacts.

To access the Requirements filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Contacts** Record type on the left.
4. Click the **More filter options** link in the lower right.

You can search on any combination of the following filters:

- **City:** The city in the Contact's primary mailing address.
- **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.

- **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.
- **Contacts unaffiliated with Requests:** Searches for Contacts that are not affiliated with any Requests.
- **Contacts with Alerts:** Searches for Contacts that have an alert posted.
- **Discipline:** Disciplines which the Contact has studied.

- **E-Mail:** Search by contact email address.
- **First Name:** The first name of the Contact.
- **Last Name:** The last name of the Contact.
- **Include Donors:** The contact is a Donor.
- **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:** 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.)

About Contacts

In each Contact record, 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 contacts list 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.

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 in the Primary Relationship area. Additional Contacts are displayed in the Related Affiliations links of the Organization or Request.

Accessing Contacts

There are a few ways in which you can locate and access Contacts:

- Use the Quick Find field to search for the **Contacts** and the results will be displayed in the Workspace.
- Click **Full Search**. Click **Saved Searches**. Click **Contacts** Record Type and use one of the Saved Searches.
- Click **Full Search**. Click **Query Builder**. Click **Contacts** Record Type and create a search using the filters available.
- From the Related **Contacts** link of a selected or open record.
- From the Related **Affiliations** link of an Organization or Request record.

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** link. A list of affiliated Contacts is displayed:

From the Affiliations list, you can double click one to edit the Contact.

How Contacts Are Displayed in the Workspace

The **Contacts** list displays information after you have successfully searched for a Contact, or if you clicked on the Related Contacts link from another record.

By default, Contacts are displayed alphabetically by last name. You can customize the format and content of the information in the Workspace. The following default information is displayed in the Contacts folder:

- **Alert Status:** A red exclamation mark is displayed if an alert has been posted for the Contact. Hover over 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.
- **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.
- **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 Contacts Edit Form

The **Contacts** Edit Form displays information after you have successfully searched for a Contact and double-clicked on the listed record on the search results page in the Workspace.

NOTE: If there is an alert set, it will be displayed in an orange bar on top of the page below the header.

The Contact Edit Form contains the basic information for each Contact you add or modify.

From the Contact record's edit form, you can:

- Enter Basic Contact Information
- Enter a Primary Organization Affiliation for the Contact
- Clear the Primary Organization Affiliation

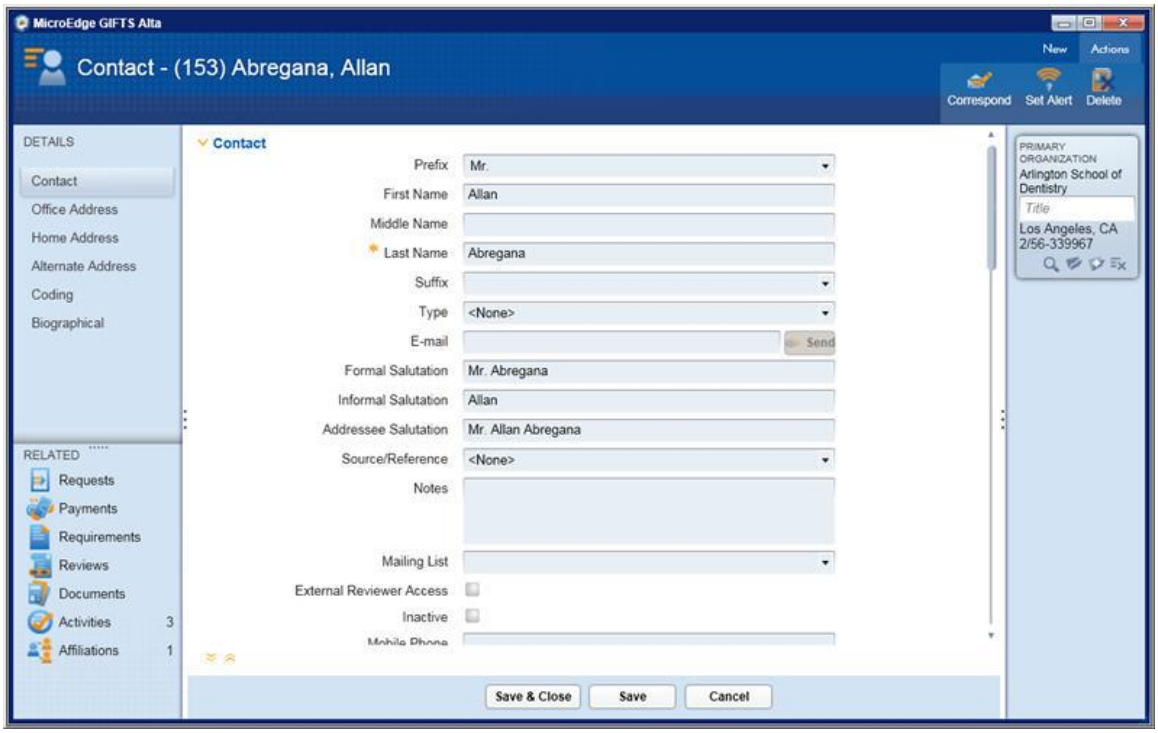
NOTE: If your GIFTS administrator has configured the system to search for duplicate Contacts, it automatically searches the database for a name starting with the name entered in the Name field to help ensure that you do not create duplicate records.

- 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.

By default, the following information is available on the Contact's Edit Form:



Related Links:

- Requests
- Payments
- Requirements
- Reviews
- Documents
- Activities
- Affiliations

Primary Relationship Cards:

- Primary Organization

Details Sections:

Contact

- **Prefix:** The Contact's prefix. You can select "Mr.," "Ms.," and various other professional and clerical titles from the list.
- **First Name:** The Contact's first name.
- **Middle:** The Contact's middle name or initial.
- **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.
- **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.)
- **Email:** 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.

  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.

- **Formal Salutation** - 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 GIFTS administrator.
- **Informal Salutation**
- **Addressee Salutation**
- **Source/Reference** - choose the member of your staff responsible for your Mailing Lists.
- **Notes**
- **Mailing List** - The Mailing List information can be used to create Batch Correspondence, and to run the Standard Reports that create labels for these mailings. Standard values are

Newsletter, Holiday Cards, or Annual Report. Additional values can be added to the Mailing List table through the Administrator module.

- **External Reviewer Access** - gives the Contact the ability to be an external reviewer.
- **Inactive** - Check this box to make the Contact inactive.
- **Mobile Phone** - The Contact's mobile phone number, if available.
- **Pager Number** - The Contact's pager number, if available.
- **Primary Address**

Use the following fields to track the Contact's address information.

Office Address

Each Contact may have up to three addresses: Office, Home, and an Alternate address.

- **Primary** - check this box to make this address the primary.
- **Use Organization's Address** - check this box to use the Primary Organization's address.
- **Omit Organization's Name from Label** - 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.
- **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.
- **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** - 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.
- **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.
- **Telephone** - 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 GIFTS 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.
- **Alternative Telephone** - The secondary telephone number and extension. You can enter a description of this number to the left of the number fields, if desired.

- **Description** - This field allows you to enter a description of the Address, such as “Summer Home.”
- **Office Fax** - The Contact’s fax number at this address.

Home and Alternate Addresses

The Home and Alternate Address sections are identical in terms of fields available:

- **Primary**
- **Address**
- **City**
- **State**
- **Postal Code**
- **Country**
- **Telephone**
- **Alternative Telephone**
- **Description**
- **Fax**

Coding

The classifications available in the Contacts Coding Sheet are defined by your Administrator.

This section includes basic information about entering Coding Sheet data. Click here for more comprehensive information on Coding Sheets.

Adding Codes

To classify the Contact, click the category in which you wish to supply a code and the codes defined for that category are displayed.

To add a code, double click it to move it to the right Selected Codes side.

To add a code to another category, you can use the drop down menu on top to display its coding without closing the Code Sheet window.

When you are finished adding codes, click **Done**.

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 on top, and the *secondary codes* are below.

To make a secondary code the primary code within a category, click the **Primary** flag next to the value.

Removing Codes

To remove a code, click the **[X] 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 Workspace.

Biographical

This tab contains biographical information about the Contact. It also includes the Mailing Lists that can be used to generate Batch Correspondence, and various types of salutations to be used for the Contact.

Biographical Information and Notes

- **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.
- **Highest Degree Awarded:** The highest degree awarded to the Contact.
- **Year Awarded:** The year in which the above degree was awarded.
- **School Name:** 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 **Search** button to choose an existing Organization or to create a new Organization.

- **Discipline:** The disciplines studied by the Contact. Additional values may be added to the Disciplines table through the Administrator module.

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.

The Primary Organization Card is shown on the Contact's edit form.

If an Organization or a Request is currently selected in the Workspace, when you create a Contact, the system enters the selected Organization as the Primary Organization. To enter or change the Primary Organization for a Contact, click the **Search** icon in the Primary Organization Card. The Organization Search window opens, from which you can select the Organization.

If you cannot find the Organization in your database, you can click **New Organization** to create a new Organization.

Clearing the Primary Organization Affiliation

To clear the Primary Organization Affiliation, click the Remove icon on the Primary Organization Card. You are prompted to confirm that you want to clear the Organization. Click **Yes**.

NOTE: Note that this deletes the Primary Organization Affiliation between the Contact and the Organization, but does not delete either the Organization or the Contact.

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:

1. Go to **New > Contact** on the ribbon menu from most screens in Alta.
2. Enter the contact information in the fields provided. See The Contacts Edit Form for details on all the fields.

   Note: If you started the new contact from the Organization's record, the Organization Primary Relationship card will be filled in for you. Otherwise you will need to use the Search icon on the card to define the Organization for the Contact.

3. Click **Save and Close** when done.

To Modify an Existing Contact:

1. Search for the contact and double click it on the Workspace or select it and go to **Actions > Open**. The Contact record is displayed.
2. Make the necessary changes and click **Save and Close.**

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.

Setting up an alert as follows:

1. Search for the Contact record and open it's edit form.

   Note: The Set Alert menu option will only be available on the record's edit form.

2. Go to **Actions > Set Alert** and the orange alert bar will be displayed .
3. Click in the orange bar where it says **<Type alert message here>** to open the text entry field.
4. Enter your message and press **Tab**.
5. The alert message is now set.

To remove the alert, click the **X** on the right side of the message bar.

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 edit form.
2. From the ribbon menu, choose **Actions > Delete**. GIFTS prompts you to confirm that you want to delete the Contact.
3. Click **Yes** to delete the Contact or **No** to leave the process.

Exporting Contacts to Outlook

Currently in GIFTS Alta, there is no direct way to export Contacts to Microsoft Outlook.

However, with the steps below, it is possible to export your Contacts in GIFTS Alta to Microsoft Outlook.

Step 1: Set up an Export to Outlook View

This step needs to only be done once and will save you formatting time in the future once the data is exported to Excel.

1. Perform a Contacts search using Quick Find or go to a Related Contacts list.
2. Click the **Open View** icon on the bottom of the screen.
3. Remove all the currently displayed columns using the left arrow.
4. Add the following columns as listed:
    - Contact: Full Name
    - Primary Organization: Name
    - Contact: Title
    - Contact: Email Address
    - Contact: Primary Phone
    - Contact: Mobile Phone
    - Contact: Primary Address

    Note: The above list is the order in which a new contact form in Outlook would be filled in. Additional columns may be added if desired.

5. Click **Save**.
6. Name the new View "Export to Excel and Outlook" or similar and add a Description.
7. Click **OK**.
8. Click **Apply**.

Step 2: Export Contacts to Excel

To export Contact data to Excel do the following:

1. Apply your "Export to Excel and Outlook" view to a Contacts search results page or Related Contacts list.
2. Select one or more Contacts from the search results page or Related Contacts list, if desired.
3. Go to the **Options** menu tab and click **Export**.
4. For **Export to**, select **Excel**.
5. For **Export**, select All rows or Selected Rows.
6. Click **OK**

Step 3: Prepare the Data for Import to Outlook

Review your Contacts data in Excel. If you used the custom view described above, all the data should be in the proper order for import to Outlook.

Save the file as an **Excel 97-2003 Workbook**(*.xls) type to a location that will be easy to find during the import process.

Step 4: Import the Contacts into Outlook

The Import and Export Wizard in Outlook makes it easy to import contact information from an Excel worksheet into your Outlook Contacts folder.

1. In Outlook 2003 or earlier, on the **File** menu, click **Import and Export**. In Outlook 2007/2010, go to **File > Open > Import**.
2. Click **Import from another program or file**, and then click **Next**.
3. Click **Microsoft Excel**, and then click **Next**.
4. In the **File to import** box, browse to find the Excel file (.xls) that contains the content you want to import.
5. Click one of the following:

    - Replace duplicates with items imported
    - Allow duplicates to be created
    - Do not import duplicate items

6. Click **Next**.
7. In the folder list, click the Contacts folder where you want the imported contact information to go, and then click **Next**.
8. To add or remove fields to determine the way the contact information is saved in the new imported file, click **Map Custom Fields**.

    Note: The **Map Custom Fields** button in the Import a File dialog box might not be available when you try to import data from another program or file. In the **The Following Actions Will Be Performed** box, select the **Import** check box, and then the **Map Custom Fields** button is available.

9. Click **Finish**.

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.

About Affiliations

Primary and Secondary Affiliations

Searching for Affiliations

Accessing Affiliations

The Affiliations Edit Form

Creating and Modifying Affiliations

Correspondence for Contacts and Affiliations

Closing a Batch of Affiliations

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:

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:

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.

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 list of Contact records, you can clear the "Include Closed Affiliations" check box to see the Contact's active Affiliations only. You can select and close a batch of Affiliations all at once.

Primary and Secondary Affiliations

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 Workspace in the same way. Primary and secondary Affiliations are created and modified differently, however, as described in Creating and Modifying Affiliations.

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:

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 Request'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.

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.

Searching for Affiliations

You can search for Affiliations using any of the GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Affiliations.

To access the Organization filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Affiliations** Record type on the left.
4. Click the **More filter options** link in the lower right.

The following section details some of the more common search filters for Affiliations:

- **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.
- **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 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 Disposition:** The Disposition of the Request(s) whose Affiliations you want to find.
- **Request Type and 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.

Accessing Affiliations

There are two ways in which you can access Affiliations:

- From double clicking on an Affiliation listed in the Workspace.
- From the **Affiliations** Related link of a Contact, Organization, or Request record.

Accessing Affiliations in the Workspace

To view Affiliations in the Workspace, you can:

- Use Quick Find, Query Builder, or a Saved Search.
- Select a Contact, Request, Organization, or Document Activity you want to focus on, then click the **Affiliations** Related link. The Workspace will then display any related Affiliations associated with that item.

To view the Affiliation record, double click it on the list.

The Affiliations List from Contact/Organization/Request Records

The **Affiliations** Related link can display all primary and secondary Affiliations associated with a record.

The columns in the **Affiliations** list display the following data:

- **Contact:** The name of the current contact and their address.
- **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:

- **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.

The Affiliations Edit Form

The **Affiliations** Edit Form displays information after you have successfully searched for an Affiliation and double-clicked on the listed record on the search results page in the Workspace.

NOTE: If there is an alert set, it will be displayed in an orange bar on top of the page below the header.

The Affiliation Edit Form contains the basic information for each record you add or modify.

By default, the following information is available on the Affiliation's Edit Form:

Related Links:

- Documents

Primary Relationship Cards:

- Organization
- Contact
- Address

Details Sections:

- **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.

Even though Primary Contact is available, selecting this Role and saving the Affiliation does *not* make the Contact the Primary Contact.

- **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.

- **Phone/Extension** - **Phone, Ext, Fax, & E-mail:** 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.
- Fax
- Email
- Long Notes

Creating and Modifying Affiliations

Primary and secondary Affiliations serve different purposes (as described here), and so are created and modified in different ways. In the following list, click the task you want to learn about:

Creating Primary Affiliations

The three types of Primary Affiliations 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.

- **Request** Primary Contact Affiliations are created when you add a Request, or change the Primary Contact in an existing Request. 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.)

- **Contact** Primary Organization Affiliations are created when you add or change the Primary Organization in a Contact record.

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.

This list has some common primary Affiliation modifications you can make without opening the Affiliation record:

- 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.

- 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.

- 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.

- 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.

- 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.

- 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.

As noted above, any primary Affiliation record can be accessed and modified manually. For details on modifying Affiliation records, please see the next section.

Creating a 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 **New > Affiliation**.
- In the Workspace, select a Request or Organization record with which you want to affiliate a Contact, go to **New > Affiliation**.

The new Affiliation record opens, with information about the Request or Organization already included.

If you want to modify an Affiliation, access the record and open it.

Address and E-mail addresses are used when you generate correspondence for the Affiliation.

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:

- The first 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.

- When generating batch correspondence, you 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.

Affiliation Addresses

To select the address for an Affiliation, click the **Search** icon on the Primary relationship card.

You have the following options when selecting the Address for an Affiliation:

- **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**
- **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: Consider a scenario where one Contact is 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.

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 Workspace, select the person's Contact record, then click the Related **Affiliations** link. 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 **Actions > Close**. The **Close Affiliations** window opens.
4. In the **As of Date** field, enter the date on which the 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 **X** to close it.

Working with Activities

This section of the help file describes how to track and schedule your day-to-day work using GIFTS Activity records.

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Searching for Activities

Accessing Activities

The Activities Edit Form

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Assigning Staff to a Batch of Activities

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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.

Activity Classes

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.

- **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.
    - 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.

- **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. For more information on these kinds of Activities, see Working with Requirements.

Searching for Activities

You can search for Activities using the Query Builder for the Activities Record Type. If you are searching only for Documents or Requirements, you can use Query Builder with those Record Types selected instead, limiting your search to those particular classes of Activities.

You can search for Activities using any of the GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Activities.

To access the Activities filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Activities** Record type on the left.
4. Click the **More filter options** link in the lower right.

The following section details some of the more common search filters for Activities:

- **Activity ID:** The ID number of the activity.
- **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.
- **Branch:** If branch security is enabled, this filter lets you search by branch.
- **Class and Type:** A specific Class and/or Type of Activity, such as "To Do" or "Rollback to Pending."
- **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 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.
- **Request Reference Number:** The reference number assigned to the Request.
- **Staff:** The member of your staff to whom the Activity is assigned.

Accessing Activities

There are several ways to access Activities in GIFTS:

- Accessing Activities in the Workspace
- Accessing Activities from a Request Record

Accessing Activities in the Workspace

You can view and access Activities in the Workspace. Requirements and Documents, two specific types of Activities, each can be viewed through the Workspace.

To view Activities in the Workspace, you can:

- Use Quick Find (if configured for Activities), Query Builder, or a Saved Search.
- Select a record (such as a Request or Contact) that you are working with. Switch to the **Activities** Related list to view all the Activities associated with that record.

You can customize the format and content of the information in the Workspace, as described in Working with the Workspace.

The following default information is displayed in the Related Activities listing:

- **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.
- **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/Filename:** 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.

To open an Activity, double click it from the list.

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** Related link. The Activities associated with the grant are displayed.

You can filter the Activities by **Class**, **Type**, and **Activities Due** fields displayed at the top of the grid.

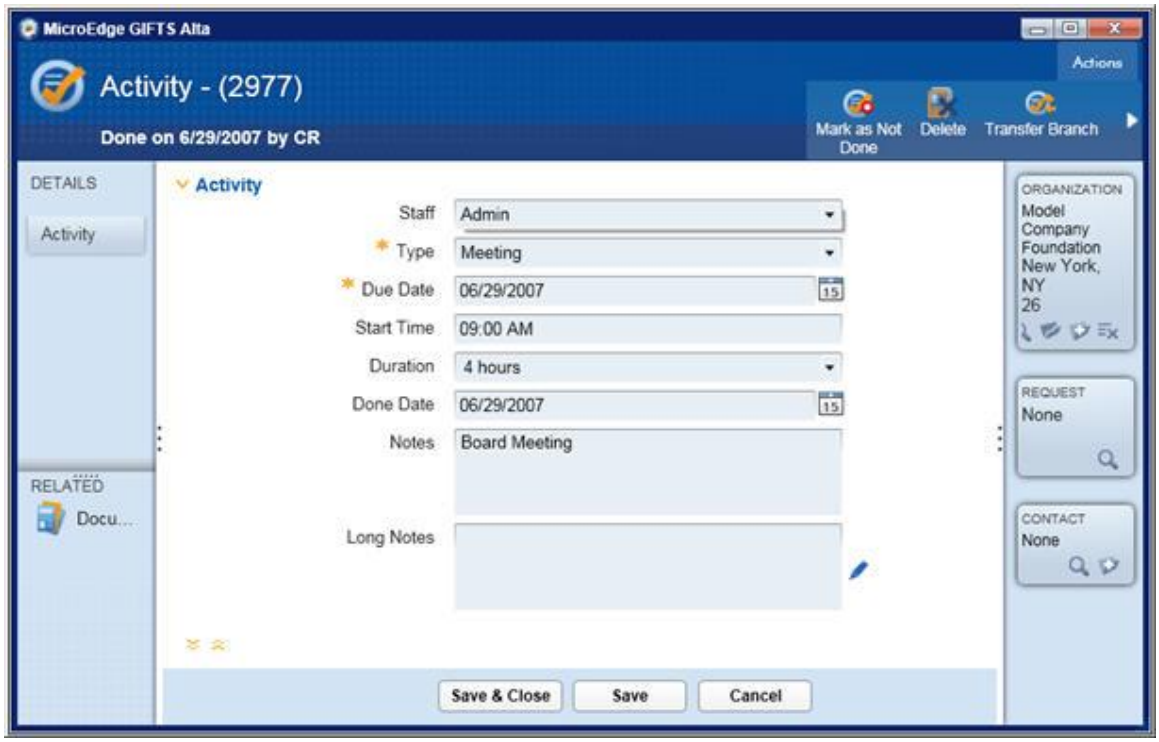
The Activities Edit Form

The **Activities** Edit Form displays information after you have successfully searched for an Activities and double-clicked on the listed record on the search results page in the Workspace.

NOTE: If there is an alert set, it will be displayed in an orange bar on top of the page below the header.

The Activities Edit Form contains the basic information for each record you add or modify.

By default, the following information is available on the Activity's Edit Form:



Related Links:

- Documents

Primary Relationship Cards:

- **Organization** - The Organization associated with the Activity.
  - If you opened this new Activity by first selecting a Request, or by clicking **New > Activities** from an open Request, the grantee Organization is already filled in.
  - If you are creating this new Activity from a blank form, use the Search button to search for the Organization.
- **Request** - The ID Number and/or Reference Number of the Request.
  - If you opened this new Activity by first selecting a Request, or by clicking **New > Activities** from 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 **Search** button to search for the Request.
- **Contact** - The primary Contact for the Activity.

- If you opened this new Activity by first selecting a Request, or by clicking **New > Activities** from 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.
- You can also select a Contact using the **Search** button on the card. All Contacts associated with the Request's Organization—and that Organization only—are available.

Details Sections:

- **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.
- **Due:** The date for which the Activity is scheduled, such as the date of the meeting.
- **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.
- **Duration:** The duration of the Activity. This field is optional.
- **Done Date:** 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.
- **Long Notes:** If you need to add more details about the activity, enter it here.

Adding and Modifying Activities

The information below describes how to open a new or existing Activity record.

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.

Create a Non-Associated Activity

To create a new Activity that is not associated with a specific record, you can do either of the following:

1. Without a record selected or open, go to **New > Activity** in the ribbon menu.
2. Fill in the other information as needed.

3. Click **Save and Close** when done.

Create an Associated Activity

To create a new Activity that is associated with a specific record, you can do any of the following:

- Open a new Activity form (as described above) and use the **Search** icons to add Organization, Contact, and Request. Note that you cannot associate the Activity with a specific Payment using this method.
- In the Workspace, select a record you wish to create an Activity for (Organization, Contact, Request, or Payment) and go to **New > Activity** on the ribbon menu.
- In the Workspace, open the record you wish to create an Activity for and go to **New > Activity** on the ribbon menu.

Edit an Existing Activity

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 Workspace, select the related Request, Organization, or Contact and click the **Activities** Related link. Double-click on the Activity or select it on the list and then click **Actions > Open** from the main menu.
- Use Quick Find (if configured for Activities) or Query Builder, or a Saved Search to locate the Activity and open the record.

When you are finished, click **Save and Close** to save the Activity or **Cancel** to exit without saving it.

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.

For example, you could use Query Builder 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 Workspace, select the records you want to change.
2. From the main menu, choose **Actions > 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 the results of your action.

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.
2. Select **Actions > Delete** from the ribbon menu. You are prompted to confirm that you want to delete the Activity.
3. Click **Yes**. If a Payment was contingent on the Activity, its Status is changed to Scheduled and you are notified with an informational message.

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.

You mark Activities done one at a time; you can also Marking Activities as Done. Activities can be re-opened after they are marked done as well.

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 Workspace, 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 the following:

- Open the grant record and go to the **Activities** Related link to display its associated Activities. Then, select the record from the list or double-click the Activity to open the edit form and click **Actions > Mark as Done**. A 'Done on' message will be displayed in the header under the title.

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 and click the **Actions > 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**.
- Select the Activity in the Workspace's list and choose **Actions>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.

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 Workspace grid and highlight the Activities that you wish to process. It's all right if the Workspace also includes Activities you do not wish to mark as Done—you can easily exclude these Activities.

To mark a batch of Activities as Done:

1. In the Workspace, select all of the Activities you wish to mark as Done.
2. From the main menu, choose **Actions > 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.

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 **Mark as Not Done** button. The Status returns to Open and the **Done Date** is cleared.

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.) You can transfer a single Activity, or a batch of them all at once.

Transferring a Single Activity to Another Branch

To transfer a single Activity to another branch:

1. Open the Activity you wish to transfer.
2. From the ribbon menu, select **Actions > Transfer Branch**.
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 Workspace, click the Related **Activities** link to view the list and select the Activities you wish to transfer.
2. From the ribbon menu, select **Actions > 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.

Working with Documents

This help topic 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.

About Documents and Document Activities

About Documents in the Workspace

Searching for Documents

The Documents Edit Form

Viewing and Editing Documents

Editing Document Links

Moving Documents

Transferring Documents to Another Branch

Removing Documents and Document Activities

Locking and Unlocking Documents

About Documents and Document Activities

Document records store the correspondence and write-ups you generate in GIFTS and keep 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 Documents in the Workspace

From the Workspace, you can open documents that are linked to GIFTS records.

The following types of documents are available:

- **Mail:** merged correspondence created in GIFTS
- **Write-up:** merged write-ups created in GIFTS. Can only be created for Request records.
- **Email:** email correspondence created in GIFTS
- **External:** any other documents linked to a GIFTS record. Can be associated with an Organization, Request, Payment, Requirement, Contact, or Review record. Added to a

record in GIFTS Alta via the **New > Document** menu option or as an attachment on an IGAM application or requirement form.

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 Workspace. The following default information is displayed in a Related Documents listing.

- **What/When:** The type of document (mail, write-up, email, 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.
- **File Name/Notes:** Any notes entered by the user in regards to the document. The filename and path is also 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.

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. Then, go to the **Documents** Related link, where all of the documents associated with the record are listed. However, you can also search for documents with the Query Builder.

You can search for Documents using any of the GIFTS search techniques.

Default Search Filters: The **Query Builder** will only have a few default search filters set initially. You can select several of the filters described below on the More Filter Options page and then click **Set as Default** to make them display for each new query for the same record type you create.

This section details the Query Builder search filters available for Documents.

To access the Documents filters:

1. Click **Full search**.
2. Click **Query Builder**, if not already selected.
3. Click the **Documents** Record type on the left.
4. Click the **More filter options** link in the lower right.

The following section details some of the more common search filters for Documents:

- **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.
- **Branch:** If branch security is enabled, this filter lets you search by branch.
- **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.
- **Document ID:** Search by document ID number.
- **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.
- **Request Reference Number:** The reference number assigned to the Request.
- **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.

The Documents Edit Form

The **Documents** Edit Form displays information after you have successfully searched for Documents and double-clicked on a listed record on the search results page in the Workspace.

NOTE: Alerts cannot be set on individual documents.

The Documents Edit Form contains the basic information for each record you add or modify.

By default, the following information is available on the Document's Edit Form:

Related Links:

- None

Primary Relationship Cards:

- **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.
- **Request:** The Request associated with the document.
- **Contact:** The last name of the Contact associated with the document (by default, the Primary Contact for the Request).
- **Payment:** The payment record associated with the document.

Details Sections:

- **Done Date:** The date of the document. (Required)
- **File name:** The name of the 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.
- **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.
- **Long Notes:** space to add detailed information about the document.
- **Shareable:** Enable this field to allow other users to access this document.

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 open a document, GIFTS opens the associated software application in Windows and loads the document.

To access an existing document:

1. Locate the document in the Workspace. The most common way is to select the record with which it is associated—such as a Request or Organization—and select it.
2. Click on the Documents related link to display a list of all of the documents associated with the record.
3. With the Documents list displayed you now have two ways to proceed:

    a. **View the Record Details First:** Double-click a record or select a record's checkbox and then go to **Actions > Open** to open the edit form to view details such as Date, Title, Author, Filename, and Notes. You can then view the actual attached document from the edit form by going to **Actions > View Document** on the ribbon menu.
    b. **Open the Attached Document:** Select a record's checkbox and go to **Actions > View Document** to open the actual attached document in its associated application.

If you are finished with the document, you may close and exit it. To switch back to GIFTS while leaving the document application open, you can press ALT+TAB or click the GIFTS icon in the Windows taskbar.

Viewing Images

Images associated with a record are automatically displayed in GIFTS Alta on the right side panel under the Primary Relationship Cards.

For more details on this feature, see the Image Viewer.

Editing Document Links

Documents are linked to GIFTS records by their respective Document Activity records. Summary information about the document is included in the Activity record.

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.

NOTE: The Documents Related link provides access to the file linked to GIFTS. The Activities Related link 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. Then, go to the **Activities** list, 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 double click it or choose **Actions > Open** from the main menu. GIFTS opens the Activity.

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. Select the documents that you wish to move in the Workspace.
2. From the main menu, choose **Actions > Move Document**. You are prompted to choose a destination for the documents.
3. Enter the destination and 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.) You can transfer a single Document, or a batch of them.

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 the *GIFTS 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 Workspace's **Documents** list, select the Document you wish to transfer.
2. From the main menu, select **Actions > 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 Workspace, display and select the Documents you wish to transfer.
2. From the main menu, select **Actions > 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. Select the documents that you wish to remove.
2. From the menu, choose **Actions > 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 GIFTS administrator can purge them from the \TEMP directory. For details on purging documents, please see the *GIFTS 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 Workspace. 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.

Locking Documents

To lock a Document or group of Documents:

1. Select the Documents you wish to lock.
2. From the main menu, choose **Actions > 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 Workspace 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. Select the Documents you wish to unlock.
2. From the main menu, choose **Actions > Unlock**. You are prompted to confirm that you want to unlock the Documents.
3. Click **Yes**.

Merge to PDF

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

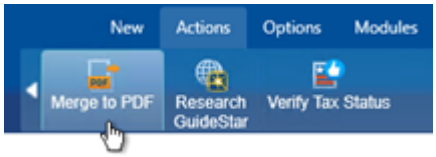
All users will have the ability to select multiple documents from a Related records or a workspace search results page and perform a batch action (Action menu item) that will combine the contents of the selected documents into one .pdf file. A Document record is created and linked to the actual .pdf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

Merge to PDF Action

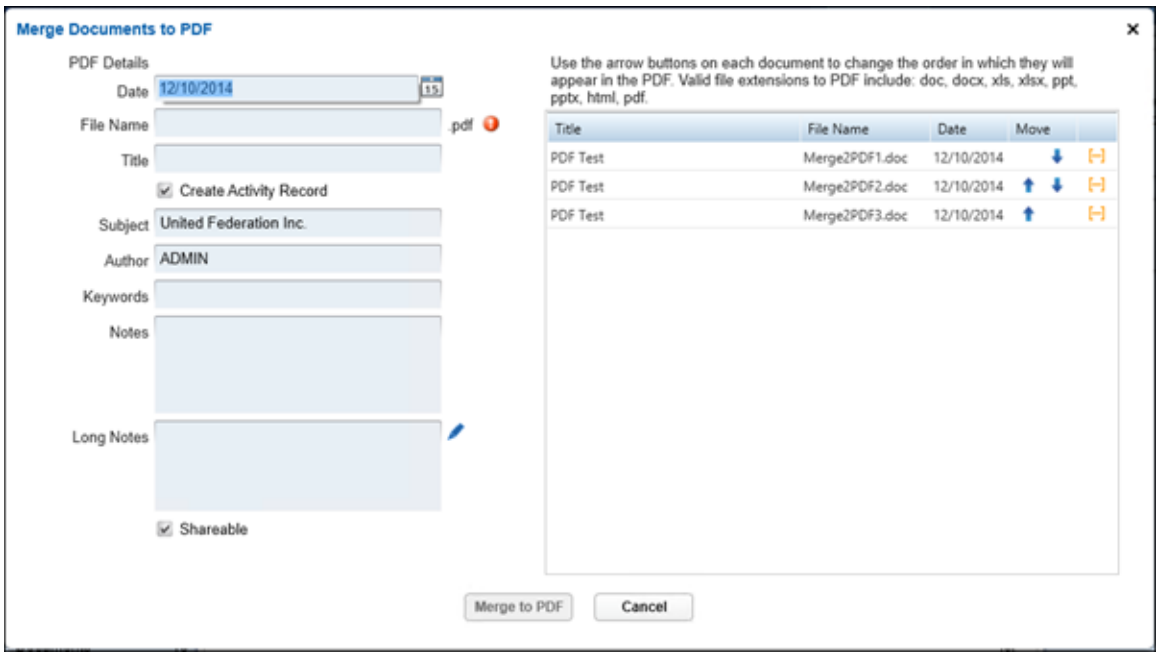
When one or more documents are selected in related records or in a search in the workspace, a Merge to PDF option will be available in the Actions menu.

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.



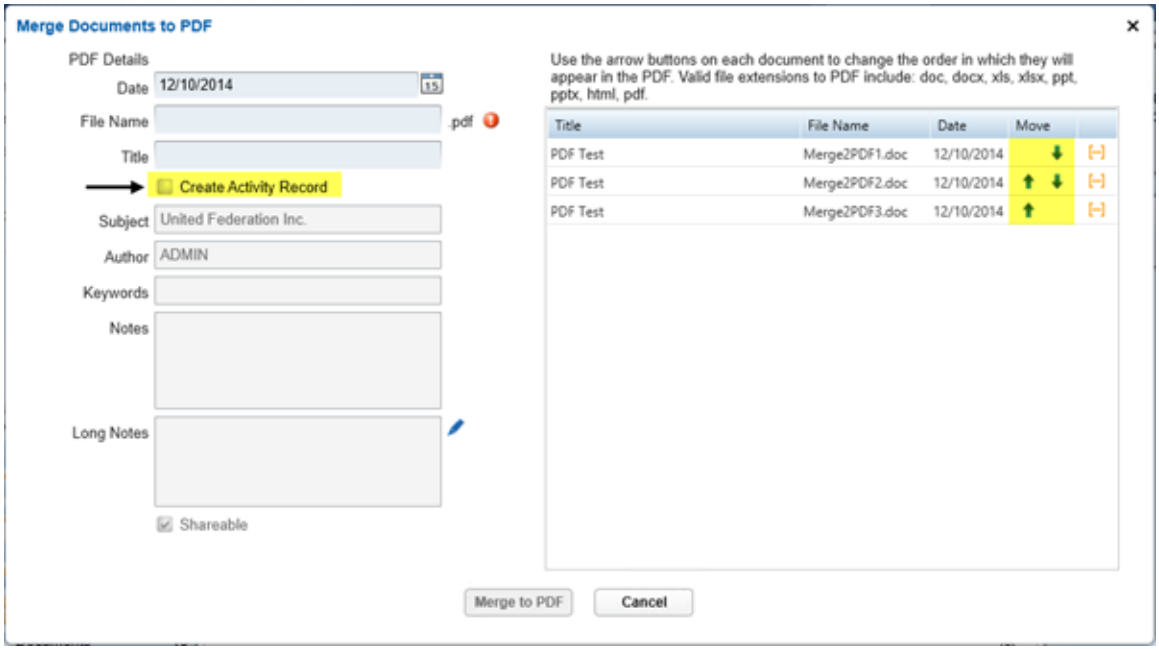
Selecting the Merge to PDF action in the Action menu will pull up the following form:



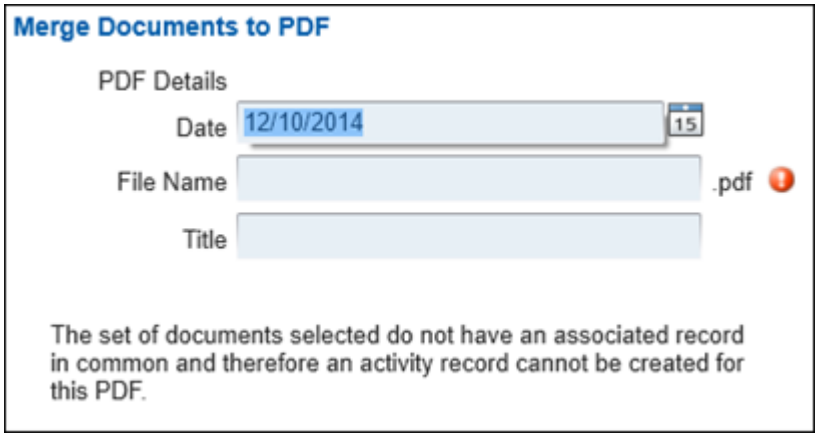
On the left hand side of the form, users can fill in information pertaining to the PDF that is being created.

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.

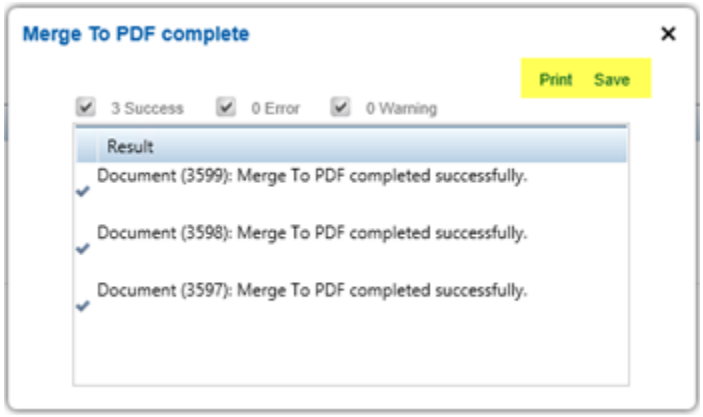
Merge to PDF Button

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.

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 just as you view merged documents created from within GIFTS.

All external documents are displayed by program associated with the specific file type according to Windows. Your GIFTS 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 *GIFTS Administrator's Guide*.

Click the links below to learn more about the Document Manager.

Linking External Documents

Viewing and Printing External Documents

Linking External Documents

To link an external document using the Document Manager, 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 select it.
2. From the main menu, choose **New > Document**.

   You can enter the following information.

   - **Organization Card:** 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 Card:** 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 Card:** The Request with which this document is associated.
   - **Done 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. Click here for information about the document display options.
   - **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.
   - **Notes:** Any notes you wish to make regarding this document. (255 char maximum)
   - **Long Notes:** If you need more space, you can them here.

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.

Viewing and Printing External Documents

When an external document has been linked using the Document Manager, you can search for and view it from within GIFTS. This section explains how to view a document from GIFTS Alta.

To view an external document:

1. Locate the document in the **Documents** in the Workspace. The most common way is to select the record with which it associated—such as a Request or Organization—and select it. Then, go to the **Documents** Related list, where all of the documents associated with the record are displayed.
2. Double click the Document or select it and go to **Actions > Open**.
3. When you are finished viewing the document, Save and Close it.

NOTE: The Outside-In Viewer is no longer available in GIFTS Alta. GIFTS displays the document with the appropriate program for the file type according to your Windows file settings.

Generating Correspondence

These help topics 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.

About Merged Correspondence

The Correspondence Generation Wizard

Creating Correspondence and Write-ups

Creating Batch Correspondence

Creating Mailing Labels

Viewing and Editing Documents

Sending E-mail Messages

Working with the Correspondence Viewer

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.

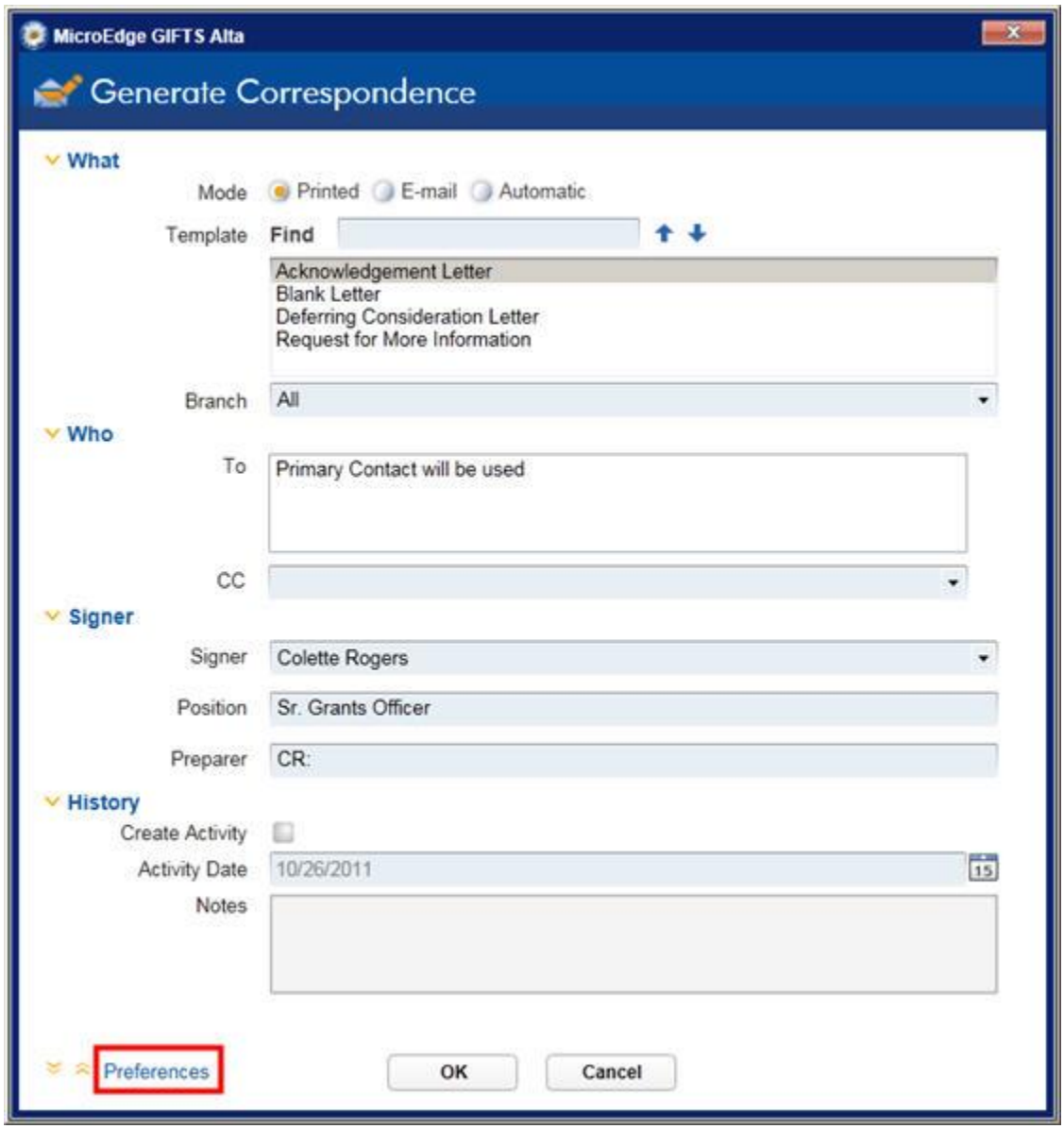
This section tells you how to access the Wizard, and describes several of the options you can choose when you generate letters, e-mails, or write-ups.

Accessing the Generate Correspondence Wizard

To open the Wizard and generate letters, e-mails, or write-ups, you can do either of the following:

- In the GIFTS Workspace, select the record or records you want to "write" about and select **Actions > Correspond** from the main menu.
- Open the record and select **Actions > Correspond** from the record's menu.

The Generate Correspondence Wizard opens.



What

- **Mode:** Specify if the correspondence will be Printed, Email, or Automatic
- **Template:** The templates available on this list will vary depending on the record type you selected and their status/disposition.
- **Attachments:** This field is only displayed if Email mode is selected. It allows you to attach a secondary template to the email.
- **Branch:** 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.

Who

- **To:** When only one record is selected for the correspondence, this field allows you to select from the contacts in the database associated with the Organization. If in batch mode, this field will be read-only and default to the Primary Contact.
- **Salutation:** Only available in single record mode.
- **CC:** In single record mode, this field allows you to search for other affiliated contacts. In batch mode, this field displays a list of contact roles to select from.

Signer

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.

- **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.

History

- **Create Activity:** If selected, a Document Activity record will be created for the correspondence. Note that creating an Activity for Correspondence does not require the Create Activity permission as this is considered a System Activity. All of the other prompts in this section are hidden if Create Activity is not selected.

- **Activity Date:** Enabled if the Create Activity box is checked. Defaults to the current date but can be modified.
- **Notes:** Enabled if the Create Activity box is checked. Allows you to add notes about the activity.
- **Branch:** Only available for Organization or Contact records.
- **Keep document on disk:** Only available in Printed or Automatic mode. This will store a copy of the correspondence in the document path assigned by the administrator.
- **Document Name:** Only visible if the Keep document on disk option is checked.
- **Save Email Text in Activity Long Notes:** This checkbox is only visible in Email or Automatic mode if the Create Activity box is checked.

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 Correspondence Generation Preferences

The preferences available in the Generate Correspondence 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. In the Generate Correspondence Wizard, click the **Preferences** link at the bottom. 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:

- **Send to:** Available if 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.
- **Request a read receipt:** Available if 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.
- **Merge as separate documents:** Available if 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 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. Steps for generating correspondence for a batch of GIFTS records are different.

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 Workspace, highlight the record and select **Action>Correspond** from the main menu.

   - Open the record and select **Actions > Correspond** from the record's menu.

2. If necessary, set up your signer information and choose your preferences for this batch of correspondence.

3. Make your selections in the Generate Correspondence fields as described in The Correspondence Generation Wizard.

4. Click **OK** when done.

The next step to take depends on your form preferences:

- If you chose **Directly to Printer** in Preferences, the process is complete and the letters are sent to your printer.
- If you chose **View/Edit** in Preferences and the correspondence is set to **Printed** mode, it is displayed in Microsoft Word. When you are finished reviewing the letter, save your changes. You can print the letter directly from Word.
- If the chose **View/Edit** in Preferences and Mode is set to **Email**, your correspondence is displayed in the Correspondence Viewer.
- If the chose **View/Edit** in Preferences and Mode is set to **Automatic,** your correspondence is displayed in the Correspondence Viewer, provided that the recipient

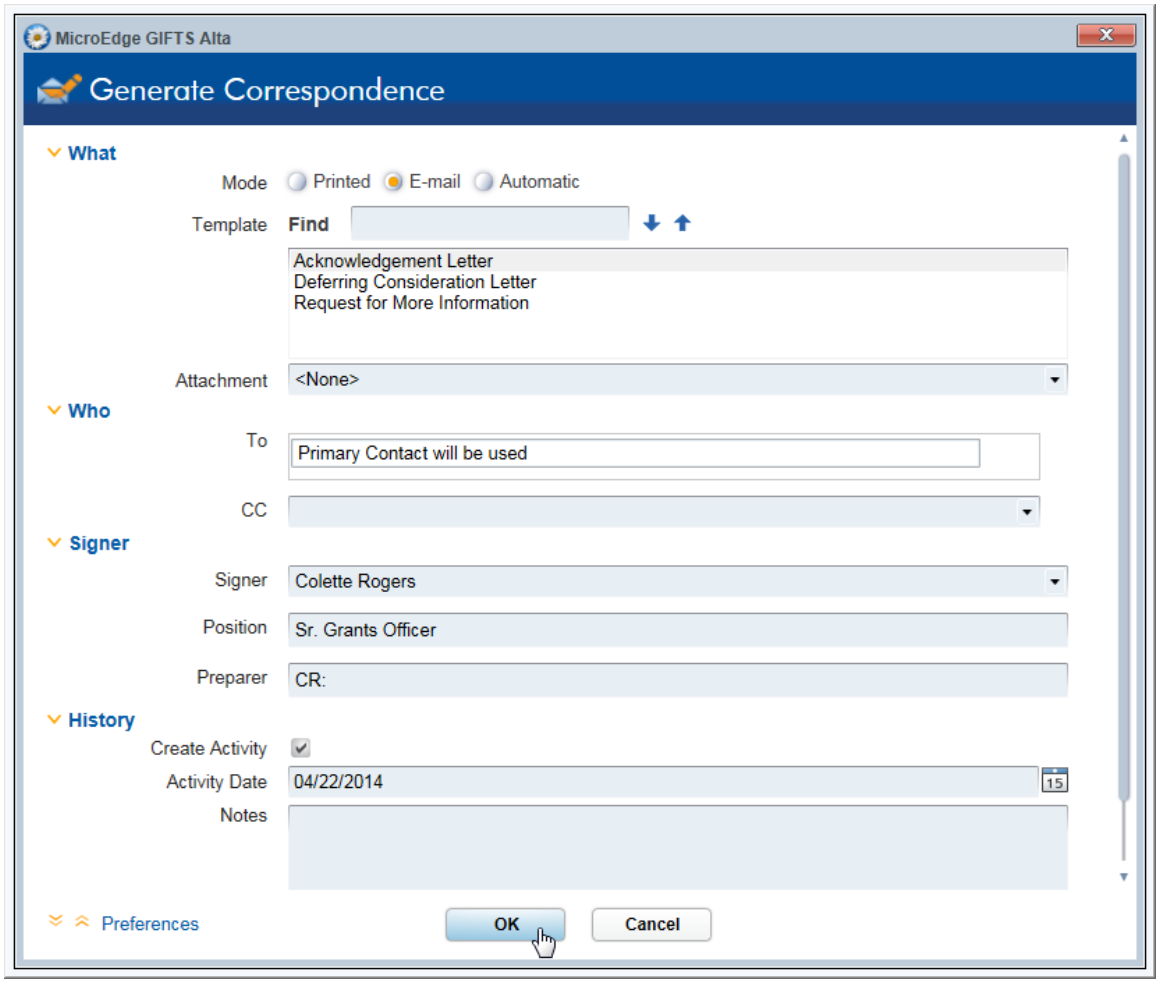
has an email address stored in their Contact record. If no email address is available, then the correspondence will be displayed in your word processor.

Click here for details on reviewing and editing correspondence in the Correspondence Viewer.

Working with the Correspondence Viewer

If you are working with E-mail messages, you can review and edit your correspondence in the Correspondence Viewer.

1. Select one or more records in the Workspace and go to Actions > Correspond.

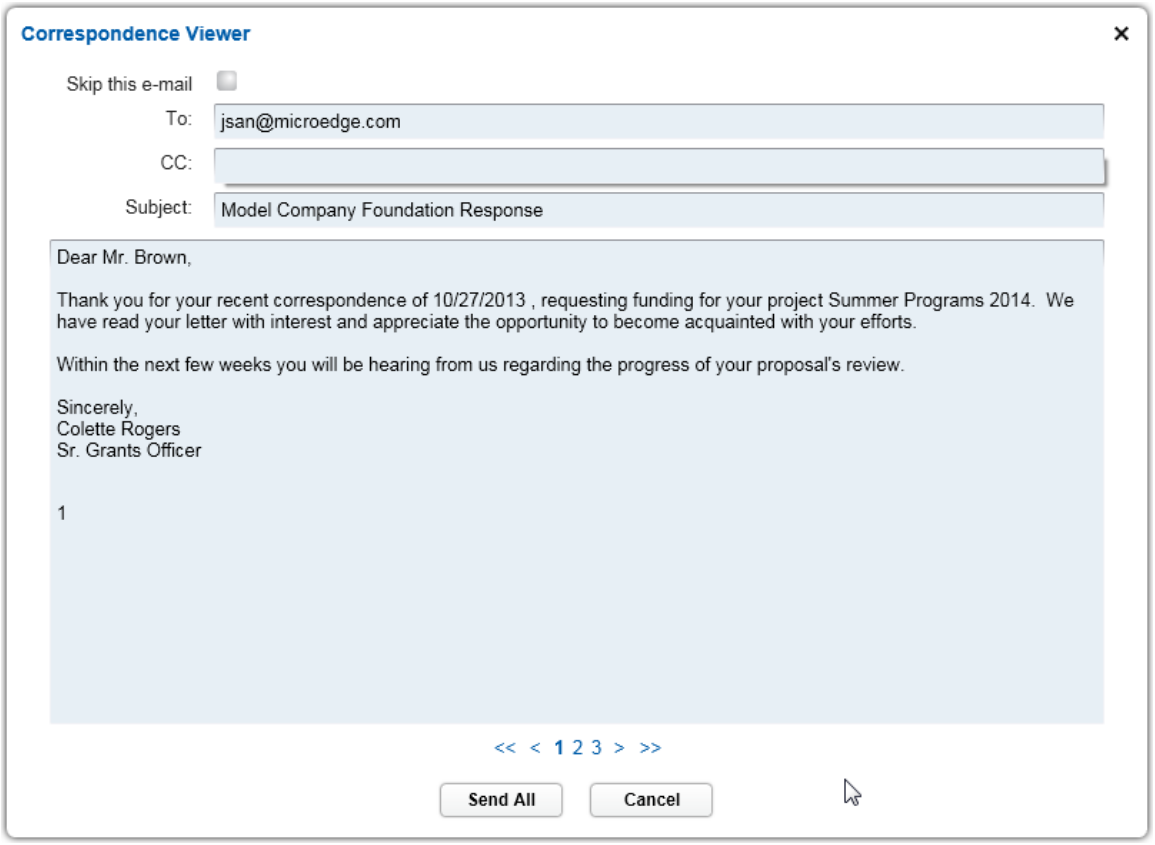


2. Make your selections in the fields as described in The Correspondence Generation Wizard.
3. Make sure the Mode selected is **Email**. Alternatively, you may also leave it on **Automatic** and if the recipient has an email address, the Correspondence Viewer will be used.

Note: If you choose **Printed** as the mode, your letter will either go directly to your printer or open in your word processor application depending on the Preferences set.

4. Click **OK** when done. The correspondence will begin processing.

5. The Correspondence Viewer will now be displayed with the Email or Letter for the first record chosen.



Note: If you selected more than one record to created correspondence for, there will be links at the bottom of to jump to the correspondence for the other records.

6. The **Skip this e-mail** box can be checked if you do not want that specific email or letter to be included when you click **Send All**. Perhaps you are unsure if the Contact's name is correct. 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.
7. If you are working with a batch of correspondence, use the navigation links above the **Send All** button to view each Email message or letter.
8. For Email messages, you can edit the To, CC, Subject, and body fields for each one.

9. When you are ready to deliver your correspondence, click **Send All.**

GIFTS Alta 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

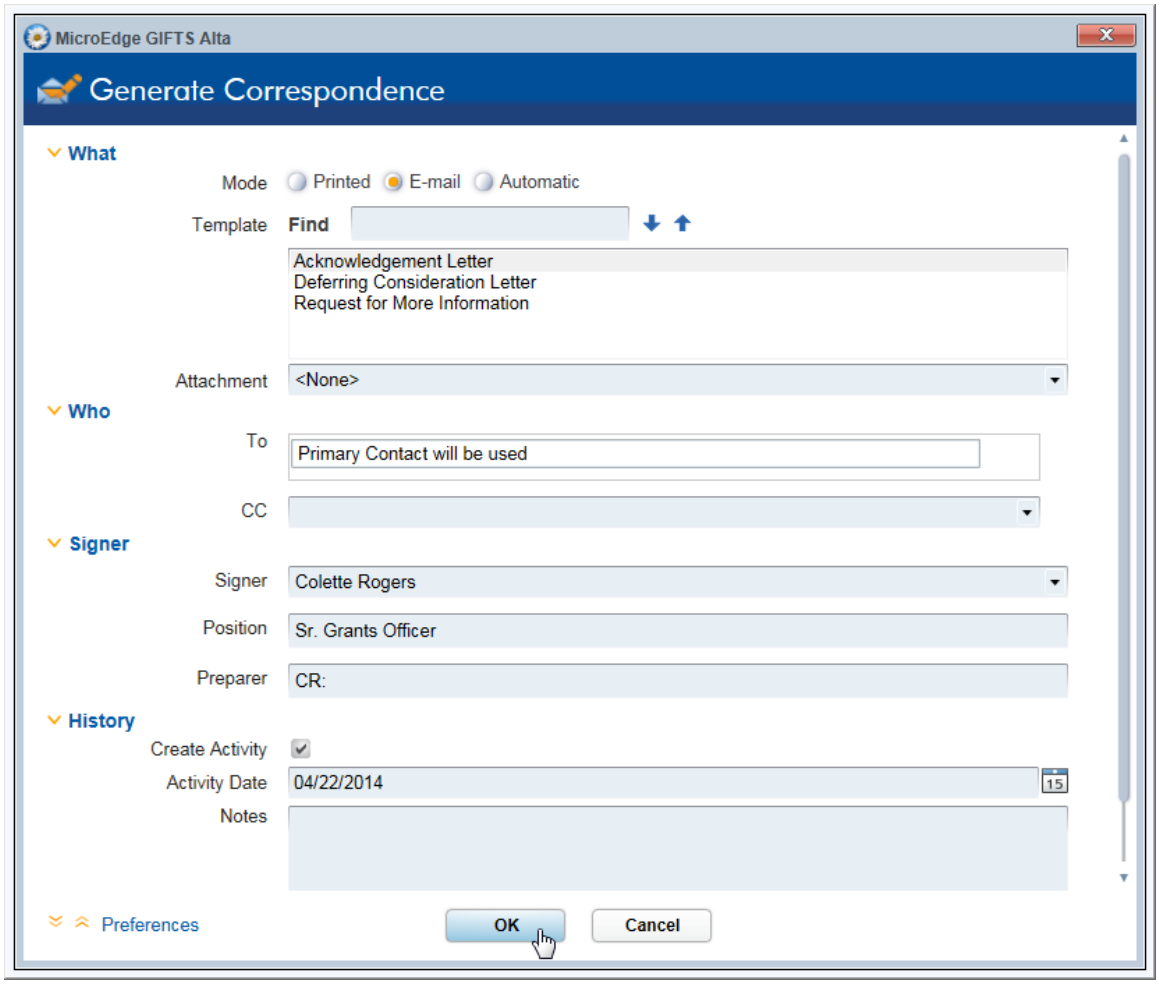
You can create a batch of correspondence for any group of records in the GIFTS Workspace. After you generate your correspondence, you can review and modify it before sending it to the e-mail recipient or to your printer.

To generate correspondence for a batch of records, use a search to display them in the Workspace grid and select 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.

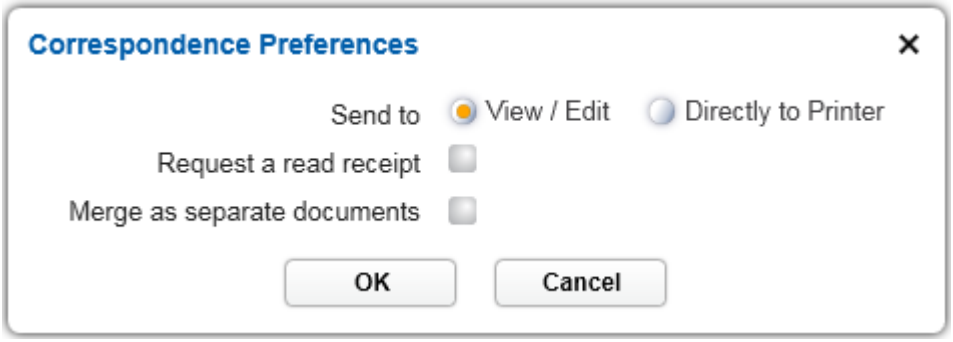
To select more than one record, hold down CTRL as you click on the records or click the **Select All** box on the grid. Each record you click on is highlighted and checked on the list, and you can de-select records by clicking on them again.

TIP: To send letters to everyone in one of your mailing lists, you can use the Query Builder to search for all the Contacts in that mailing list.

1. Select the records and choose Actions > Correspond from the Main menu. The Generate Correspondence Wizard is displayed.



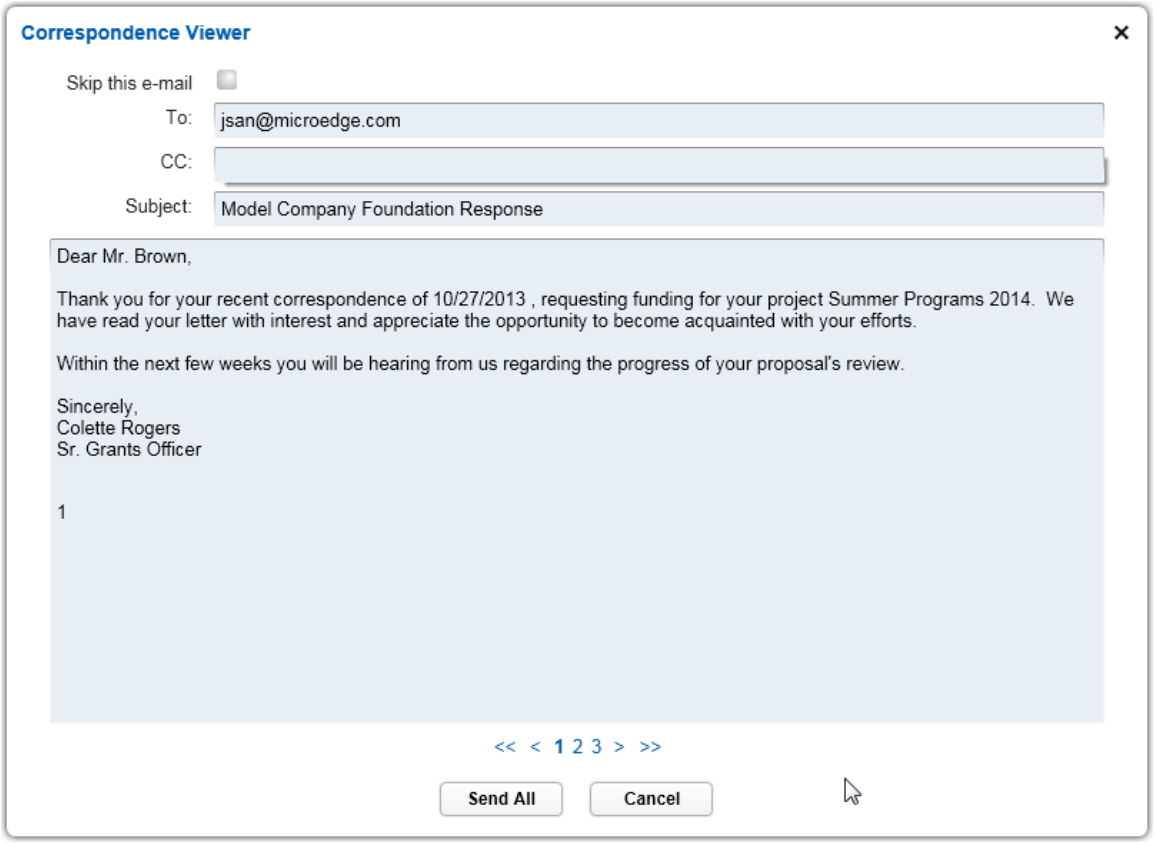
2. If necessary, set up your Signer information and choose your Preferences for this batch of correspondence.



3. Make your selections in the fields as described in The Correspondence Generation Wizard.
4. Click **OK** when done. The correspondence will begin processing.

The next step to take depends on your form preferences:

- If you chose **Directly to Printer** in Preferences, the process is complete and the letters are sent to your printer.
- If you chose **View/Edit** in Preferences and the correspondence is set to **Printed mode**, it is displayed in Microsoft Word. When you are finished reviewing the letter, save your changes. You can print the letter directly from Word.
- If the chose **View/Edit** in Preferences and Mode is set to **Email**, your correspondence is displayed in the Correspondence Viewer.
- If the chose **View/Edit** in Preferences and Mode is set to **Automatic**, your correspondence is displayed in the Correspondence Viewer, provided that the recipient has an email address stored in their Contact record. If no email address is available, then the correspondence will be displayed in your word processor.



Click here for details on reviewing and editing correspondence in the Correspondence Viewer.

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 by locating the related record(s) in the Workspace and clicking the Related Documents link. Click here for information about viewing and managing documents in GIFTS.

Sending E-mail Messages

In addition to the merged correspondence that you can send by e-mail, you can also send regular e-mail messages directly from GIFTS to any Contact in your database. You can save and review these e-mail messages later.

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 Related Activities list 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 Workspace, select the Requests, Organizations, or Contacts for which you wish to send an e-mail message.

2. On the GIFTS Alta ribbon menu, go to **Options > Email**. 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.

- 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**.

- 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.

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 Workspace, 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** field.

About Tax Status

This chapter describes how to use Tax Status to verify and update tax status information for Organizations in GIFTS Alta. It also describes how to search for tax exempt organizations in MicroEdge's Tax Exempt Organization Database.

NOTE: Tax Status requires an active subscription to MicroEdge's tax information service. If you do not have a subscription, contact your sales representative for more information.

Tax Status allows you to verify the tax status of one or more Organizations in GIFTS Alta against MicroEdge's Tax Exempt Organization Database. After verifying the tax status of one or more Organizations, you can update GIFTS with current tax status information.

You can also use Tax Status to look up tax exempt organizations not in GIFTS Alta.

About MicroEdge's Tax Exempt Organization Database

MicroEdge's Tax Exempt Organization Database is a database that contains the most current information on all tax exempt organizations. MicroEdge frequently updates this database with information from the IRS Exempt Organization Master Listing and the Canada Revenue Agency's registered charities database.

Setting Up Tax Status Codes

GIFTS Alta can only be updated with tax status codes that are found in its tax status code table. Before you use Tax Status, your GIFTS Administrator must be sure that the tax status code table is up-to-date.

When you verify an Organization's tax status, a search is done on the tax status, and if found, the tax status codes of the Organization in GIFTS and MicroEdge's Tax Exempt Organization Database are compared.

Whenever you make an attempt to update with a code not found in GIFTS Alta, you will be notified.

Updating Tax Codes in the Administrator's Module

Your GIFTS Administrator can add the missing code using the steps below, and you can then repeat the update.

To set up tax status codes in the GIFTS Administrator Module:

1. Select **Setup > Code Tables** from the Administrator menu. The Table Maintenance window is displayed.
2. Go to the **System** tab and double click **Tax Status**. The Code Maintenance [Tax Status] window is displayed.
3. Do one of the following:
    - To add a new tax status code, click **New**.
    - To update a tax status code already in the table, double-click the code.
4. Enter the code for the tax status.

Note: For a listing of all the tax codes and their associated descriptions and organization types, please refer to “Appendix: Tax Status Codes”.

5. Enter the description for the tax status.

   Note: This description appears in the Tax Status section of the Tax Status menu in the Organization window and can be anything that describes the tax status. For instance, if the tax status code is 03, an accurate description might be 501(c)3.

6. Repeat this process until all tax status codes are set up.

   Note: For more information about adding and editing codes in the Administrator Module, please refer to “Adding Codes” and “Editing Codes” in the GIFTS Administrator’s Guide.

Tax Status Codes

The following is a list of tax status codes and their associated descriptions and organization types. Your GIFTS Administrator can use this table when setting up tax status codes.

For more information, please see “Setting Up Tax Status Codes”.

Tax Status Code	Description	Organization Type
01	501(c)1	Government Instrumentality
02	501(c)2	Title-Holding Corporation
03	501(c)3	Charitable Organization Educational Organization Literary Organization Organization to Prevent Cruelty to Animals Organization to Prevent Cruelty to Children Organization for Public Safety Testing Religious Organization Scientific Organization
04	501(c)4	Civic League Local Association of Employees Social Welfare Organization

05	501(c)5	Agricultural Organization Horticultural Organization Labor Organization
06	501(c)6	Board of Trade Business League Chamber of Commerce Real Estate Board
07	501(c)7	Pleasure, Recreational, or Social Club
08	501(c)8	Fraternal Beneficiary Society, Order or Association
09	501(c)9	Voluntary Employees' Beneficiary Association (Non-Government Employees) Voluntary Employees' Beneficiary Association (Government Employees)
10	501(c)10	Domestic Fraternal Societies and Associations
11	501(c)11	Teachers Retirement Fund Association
12	501(c)12	Benevolent Life Insurance Association Mutual Ditch or Irrigation Company Mutual Cooperative Telephone Company Organization Like Those on Three Preceding Lines
13	501(c)13	Burial Association Cemetery Company
14	501(c)14	Credit Union Other Mutual Corporation or Association
15	501(c)15	Mutual Insurance Company or Association Other Than Life or Marine
16	501(c)16	Corporation Financing Crop Operations
17	501(c)17	Supplemental Unemployment Compensation Trust or Plan
18	501(c)18	Employee Funded Pension Trust (created before 6/25/59)
19	501(c)19	Post or Organization of War Veterans

20	501(c)20	Legal Service Organization
21	501(c)21	Black Lung Trust
22	501(c)22	Multiemployer Pension Plan
23	501(c)23	Veterans Association Formed Prior to 1880
24	501(c)24	Trust Described in Section 4049 of ERISA
25	501(c)25	Title Holding Company for Pensions, etc.
26	501(c)26	State-Sponsored High Risk Health Insurance Organizations
27	501(c)27	State-Sponsored Workers' Compensation Reinsurance
40	501(c)40	Apostolic and Religious Organizations (501(d))
50	501(c)50	Cooperative Hospital Service Organization (501(e))
60	501(c)60	Cooperative Service Organization of Operating Educational Organization (501(f))
70	501(c)70	Child Care Organization (501(k))
71	501(c)71	Charitable Risk Pool
81	501(c)81	Qualified State-Sponsored Tuition Program
92	501(c)92	4947(a)(1) - Private Foundation (Form 990PF Filer)

Secondary Foundation Codes

To track secondary tax status, the following codes must be set up in your Tax Status code table. Default descriptions values are provided but may be modified as needed.

NOTE: Codes F05-F08 are not defined by default but may be used as custom codes if desired.

Secondary Code	Description
F02-03	Private Operating Foundation
F04	Private Non-operating Foundation
F09	Suspense
F10-15	509(a)(1)

F16	509(a)(2) under 170(b)(1)(A)(vii)
F17	509(a)(3) under 170(b)(1)(A)(viii)
F18	509(a)(4)
F19	Not used by the IRS
F20	Not used by the IRS
F21	509(a)(3) Type I
F22	509(a)(3) Type II
F23	509(a)(3) Type III functionally integrated
F24	509(a)(3) Type III not functionally integrated

F10-15 can be further broken down to the following depending on what level of granularity is desired.

Secondary Code	Description
F10	509(a)(1) under 170(b)(1)(A)(i)
F11	509(a)(1) under 170(b)(1)(A)(ii)
F12	509(a)(1) under 170(b)(1)(A)(iii)
F13	509(a)(1) under 170(b)(1)(A)(iv)
F14	509(a)(1) under 170(b)(1)(A)(v)
F15	509(a)(1) under 170(b)(1)(A)(vi)

Canada Revenue Agency secondary codes can also be defined as follows:

Secondary Code	Description
FA	Public Foundation
FB	Private Foundation

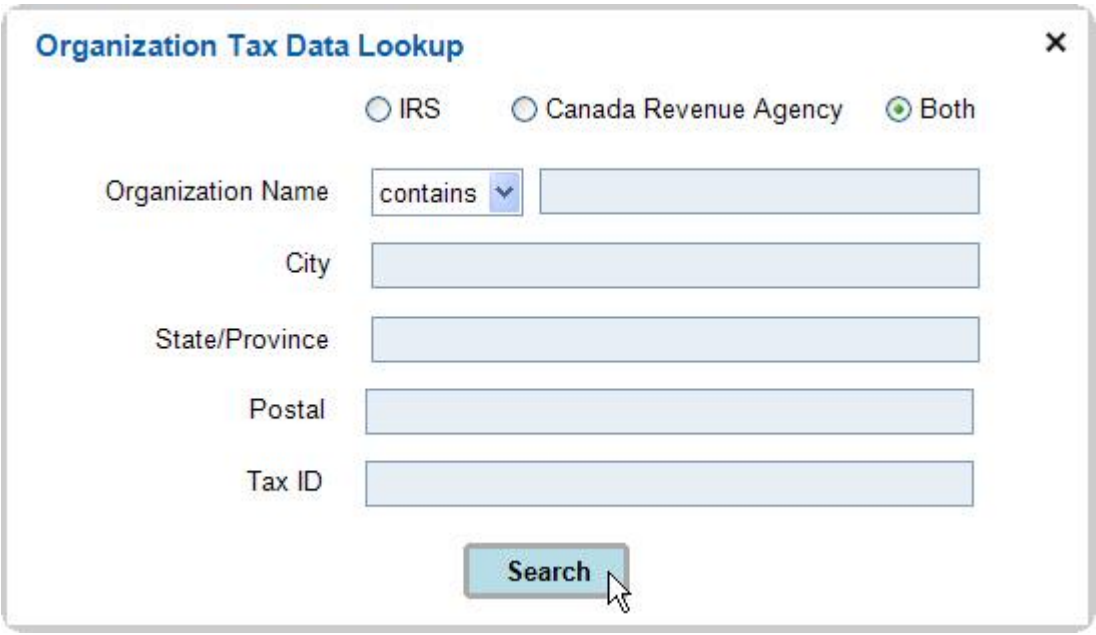
FC	Charitable Organization

Tax Status Lookup

The Tax Status Lookup allows you to search the IRS database for Organizations that do not currently exist in your system. The **Tax Status Lookup** option is accessed from the User menu of GIFTS Alta and does not require any Organization records to be selected.

Simply go to **User menu > Tax Status Lookup**.

NOTE: At least one criteria other than "Tax Status Source" must be entered. The **Search** button will be disabled until at least one other value is supplied.



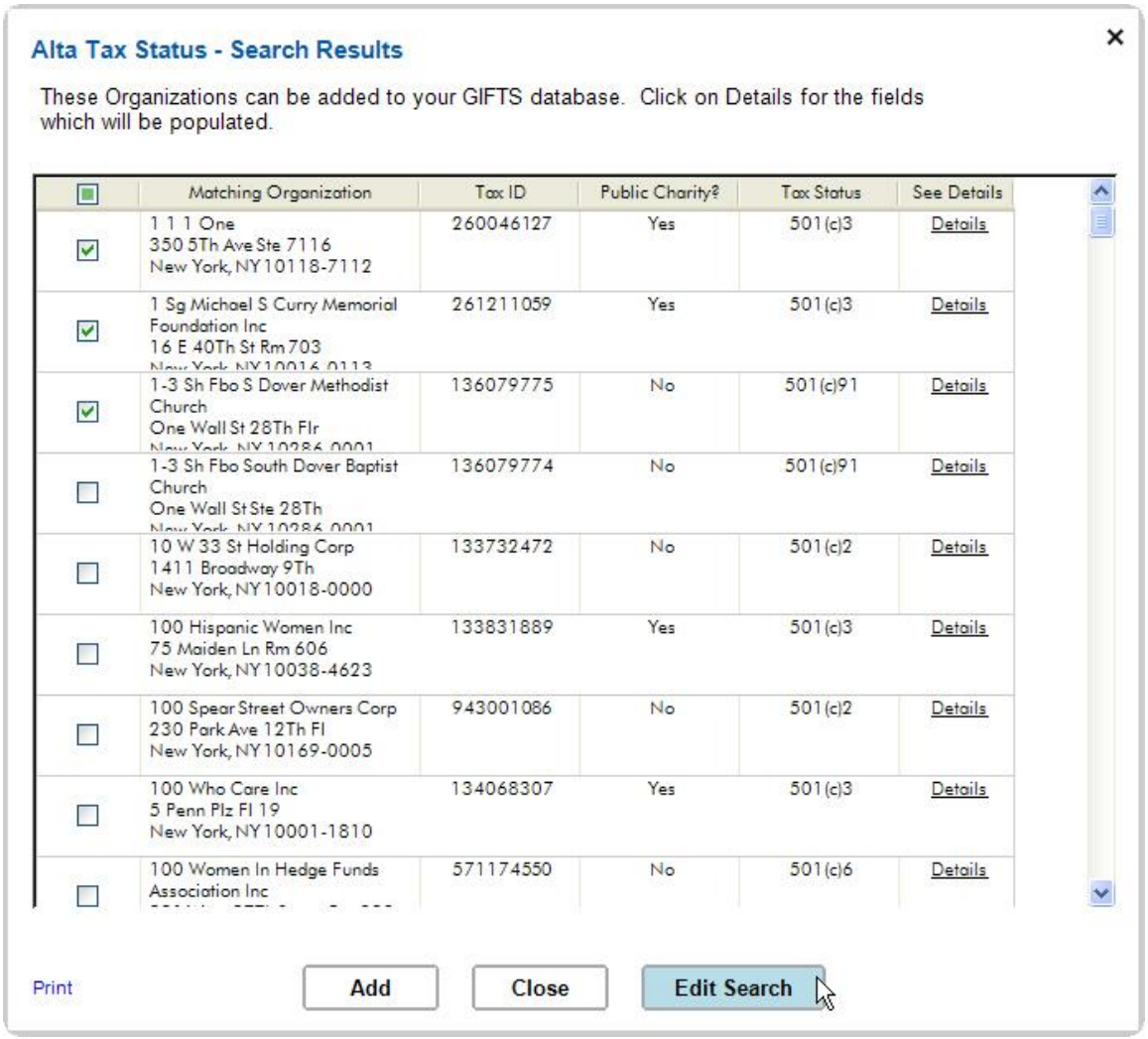
Enter search criteria in the following fields:

Field	Description
Source	Select the section of MicroEdge's Tax Exempt Organization Database to search, either **IRS, Canada Revenue Agency**, or **Both**.
Name	The name of the organization. Use the drop-down menu to select whether you are entering a whole or partial name.
City	The city where the organization is located.
State/Province	The state or province where the organization is located.
Postal	The postal code of the organization.
Tax ID	The Tax ID of the organization.
Source	Select the section of MicroEdge's Tax Exempt Organization Database to search, either IRS, Canada Revenue Agency, or both.

Tax Status Lookup Results

The following page displays the search results from the lookup.

NOTE: If more than 100 results are found, only the first 100 are displayed. Modify your search criteria to narrow down the search results.



Click **Search**. The Tax Status Lookup - Results window is displayed.

The Alta Tax Status - Search Results window contains the following columns:

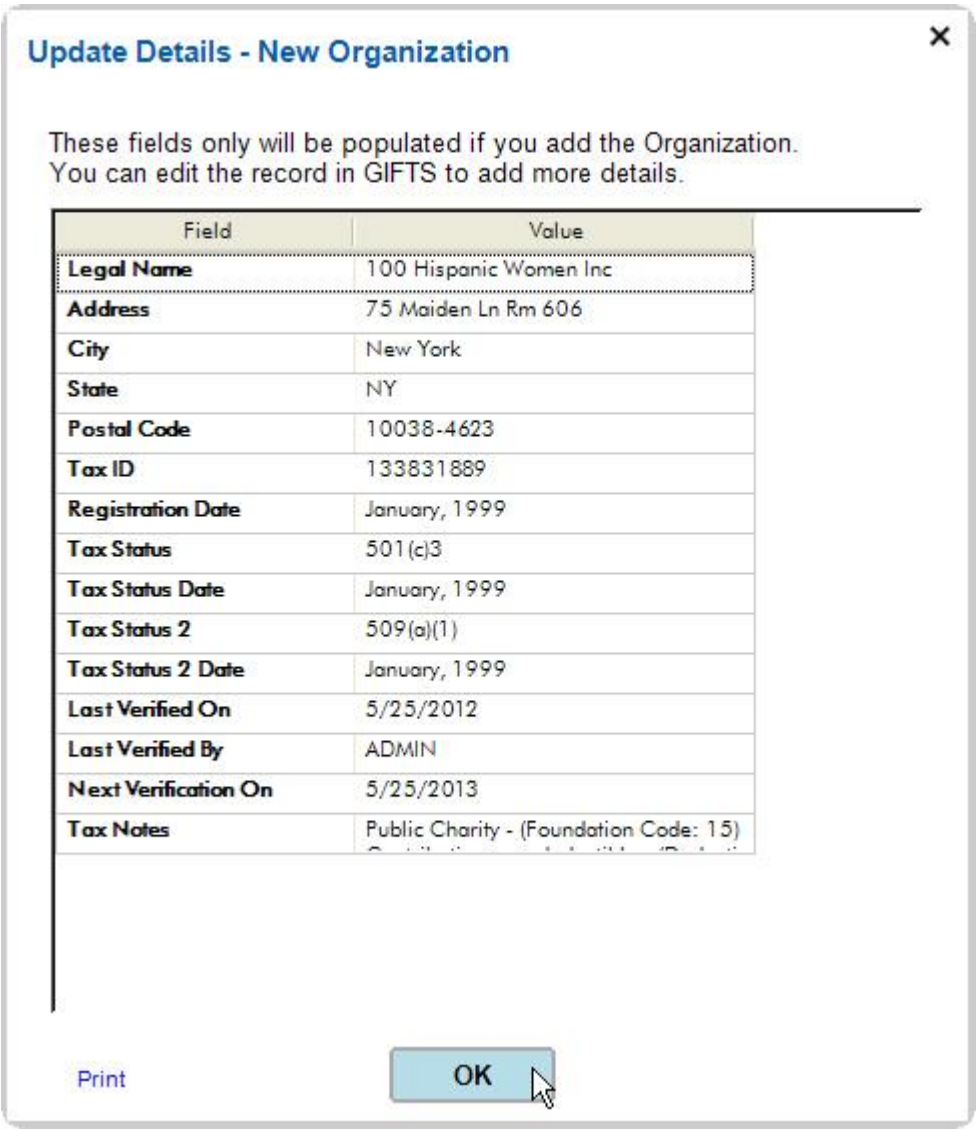
Field	Description
Matching Organization	The organization's contact information in MicroEdge's Tax Exempt Organization Database.
Tax ID	The Tax ID of the organization in MicroEdge's Tax Exempt Organization Database.
Public Charity?	This field indicates whether or not the organization is a public charity.
Tax Status	The tax status of the organization in MicroEdge's Tax Exempt Organization Database.
See Details	Click **Details** to view which fields will be added to GIFTS.

Actions Available

Action	Description
Select	Select which organizations to add to your database by checking the box in this column.
Add	Will create Organizations records in the database for the selected results.
Close	Closes the results page.
Edit Search	Returns user to the previous search dialogue. The previous search criteria will be pre-populated already.
Print	Generates a Print Preview page of the search results grid.
Details	The details link will launch a window that allows you to see the values for the Organization in question. This will let you review the data that will before adding to your database.

Details

Clicking **Details** link will display the following for each Organization:



You may only view the details of one organization at a time.

All fields are read-only and the only option available is Print.

Click **OK** to close the window.

Adding an Organization

To add an organization from the search results to your database:

1. Select an organization.
2. Click the **Add** button.
3. Click **OK** at the confirmation message.
4. Click **OK** again at the successful completion message.

Tax Status Verify

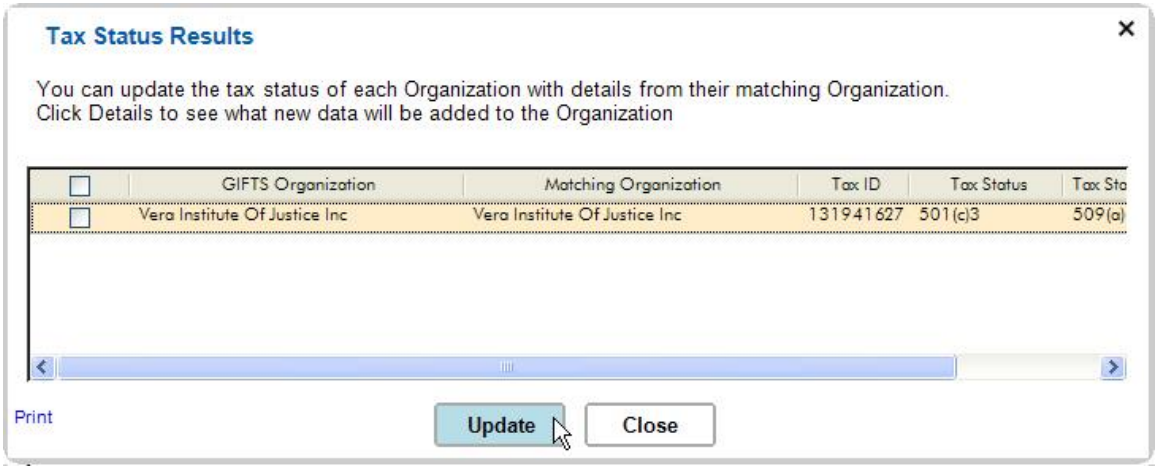
The Tax Status Verify option allows the user to verify the tax status of existing Organization records in their GO system against the ME tax database. This action can be initiated from the Organization search results page or from within an Organization edit form itself. You can also use this feature in batch mode by selecting multiple Organizations first and then going to **Actions > Tax Status Verify**.

Single Mode

When Tax Status Verify is invoked against only a single record (either from an Organization Edit Form, or when only one record is selected out of many), there will only be two possible outcomes: 'Matched' or 'Not Found'.

Match Found

If a match is found, you can click **Details** to view the Organization's IRS information.



The following actions are available on the results page:

Action	Description
Print	Generates a Print preview page of the results grid.
Details	The details link will launch a modal window that allows you to see the existing values and the new value that the record will be updated to. A checkbox column will allow the user to select which fields they would like to update.

Update	Will update Organization records in the database for the selected records.
Close	Closes the results page.

Match Not Found

If no match is found, you will get the Results Not Found window.

This means that the organization's Tax ID was not found MicroEdge's database.

At this point you may select the organization in the list and click Lookup to have GIFTS Alta perform a search by Organization name instead.

If the organization is still not found, a message will ask if you would like to refine your search criteria.

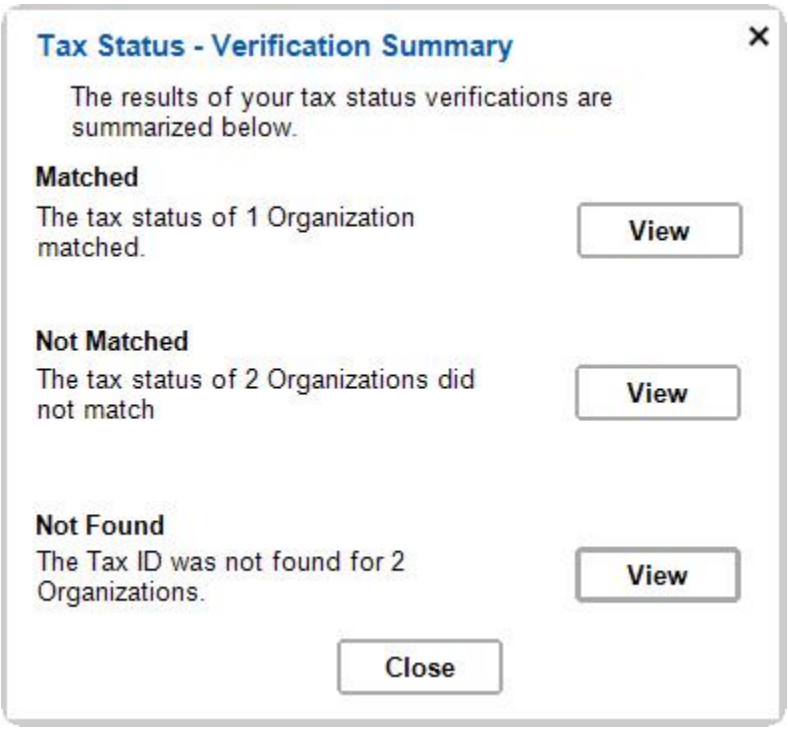
Yes – Opens the Tax Status Lookup form with the fields filled in where appropriate.

No – Returns you to the search results page or Organization edit form you were on.

Multiple Records Mode

Selecting multiple organizations on a search results page and then using the **Tax Status Verify** option will check all selected organization Tax IDs.

A Tax Status Verification Summary will display showing how many Matched and Not Matched tax IDs were found.



You can click the **View** buttons to see a list of each.

Matched:

This consists of the Organizations whose GIFTS Tax ID and tax status matched the information in MicroEdge's Tax Exempt Organization Database.

Not Matched:

Any Organizations where the Tax IDs were found however, some data did not match exactly will be listed in this section.

Not Found:

If there were Organizations that were not found by Tax ID, you will have the ability to initiate a **Lookup** search from this list.

Action	Description
Printer Friendly	Generates a temporary HTML page with the results grid.
Lookup	The lookup button will launch the Tax Status Lookup form for the selected Organization(s). The lookup form will open in a new window. The Tax Status Verification 'No Results Found' page stays open until you **Close** it.
Close	Closes the results page.

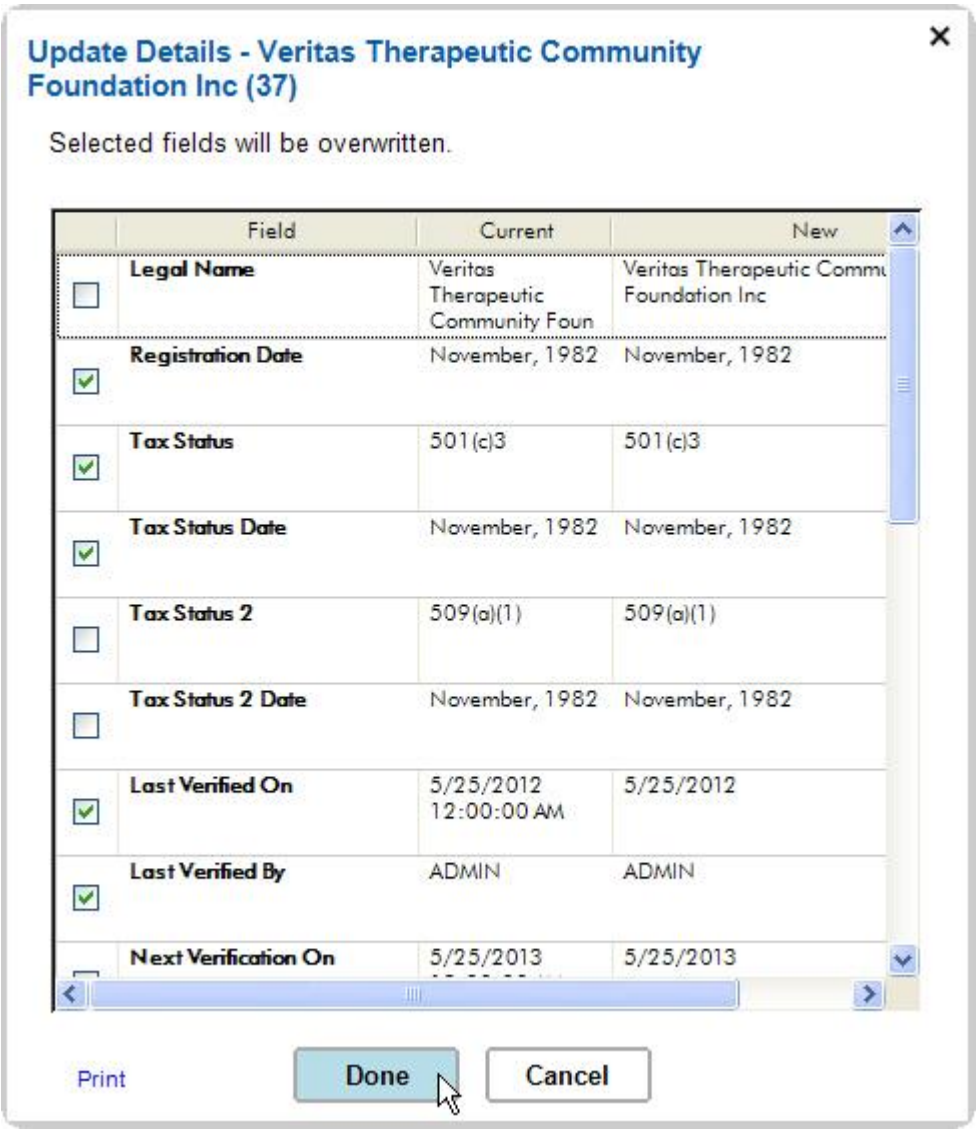
Updating Organization Information

When verifying an Organization's tax status, you can view the tax status fields that can be updated. You can then select the fields you want to update, and update them in GIFTS Alta.

Steps 1 and 2 below are optional and only necessary if you want to view or change the tax status fields to be updated. If you only want to update Organization information, go to Step 3.

To view and update Organization fields:

From the **Tax Status Results - Matched** list or the **Tax Status Results - Not Matched** list, click **Details** next to an Organization. The Update Details window is displayed.



1. The Update Details window contains the following columns:

Column	Description
Field	The name of the field. Click the check box next to this field to select it, or clear the check box to clear it.
Current	The field information in GIFTS.
New	The field information in MicroEdge's Tax Exempt Organization Database. If you select this field and update GIFTS, the information in this field overwrites the information in GIFTS.

Note: Selected fields will be overwritten in GIFTS if you update this Organization. The fields which are selected by default are determined by your setup preferences.

2. Choose one or more of the options on the Update Details window:

Option	Description
Print	Prints the displayed information.
Set	Saves any changes and closes the window. To update GIFTS with the selected fields, go to Step 3.
Cancel	Closes the window without saving any changes.

Note: For detailed information about the **Tax Notes** field, please refer to "Understanding Tax Notes Field Data," Solution #1369 in the MicroEdge PowerME client portal.

3. From the Tax Status Results window, click **Done**. This updates the selected Organizations with selected information from MicroEdge's Tax Exempt Organization Database. If you do not update all the Organizations on the Tax Status Results window, a window is displayed indicating the number of Organizations that have been updated. Click View Results to return to the Tax Status Results window.

GuideStar Charity Check

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.

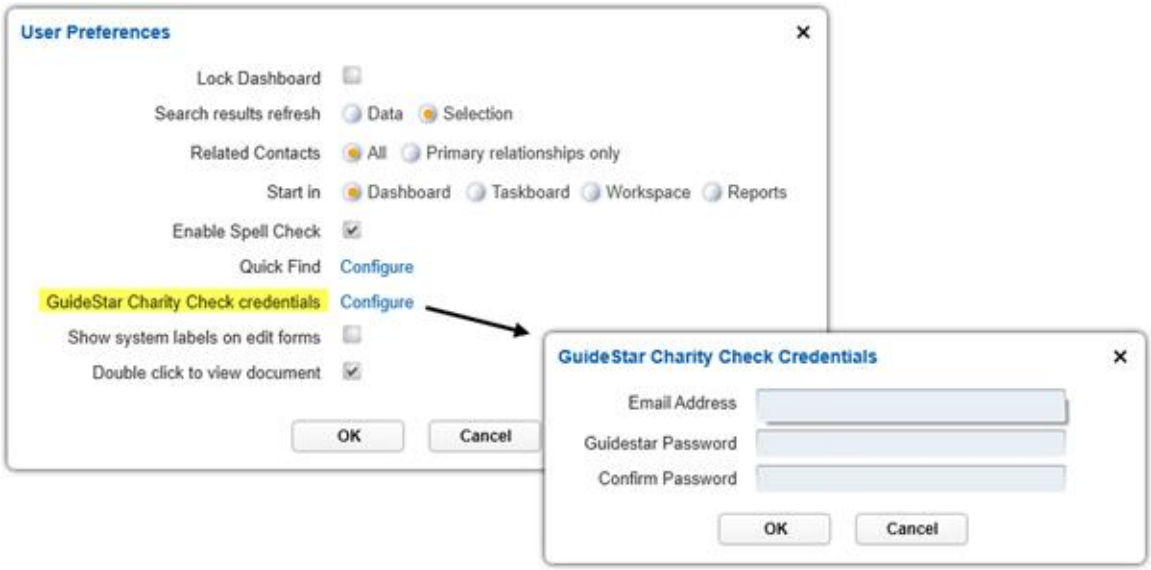
3. You will then receive a confirmation email from services@microedge.com that your account has been activated.
4. Once you receive your confirmation from services@microedge.com , enter your GuideStar Credentials into the GIFTS Alta as described below.

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.

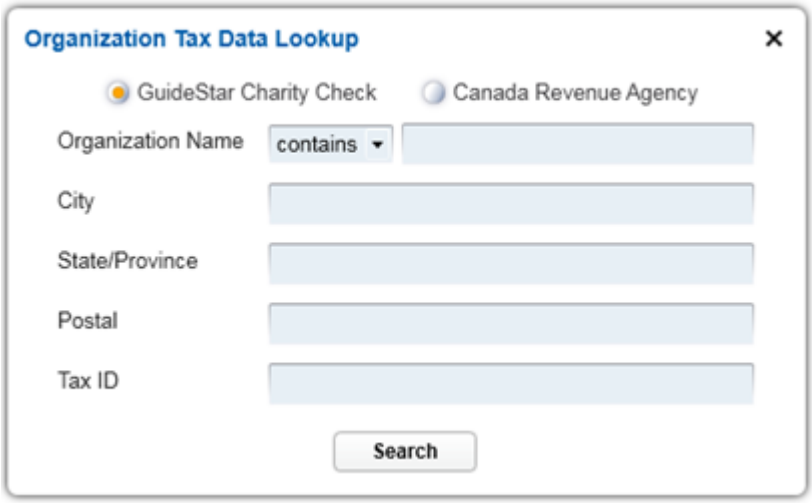
Subscription Verification

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.

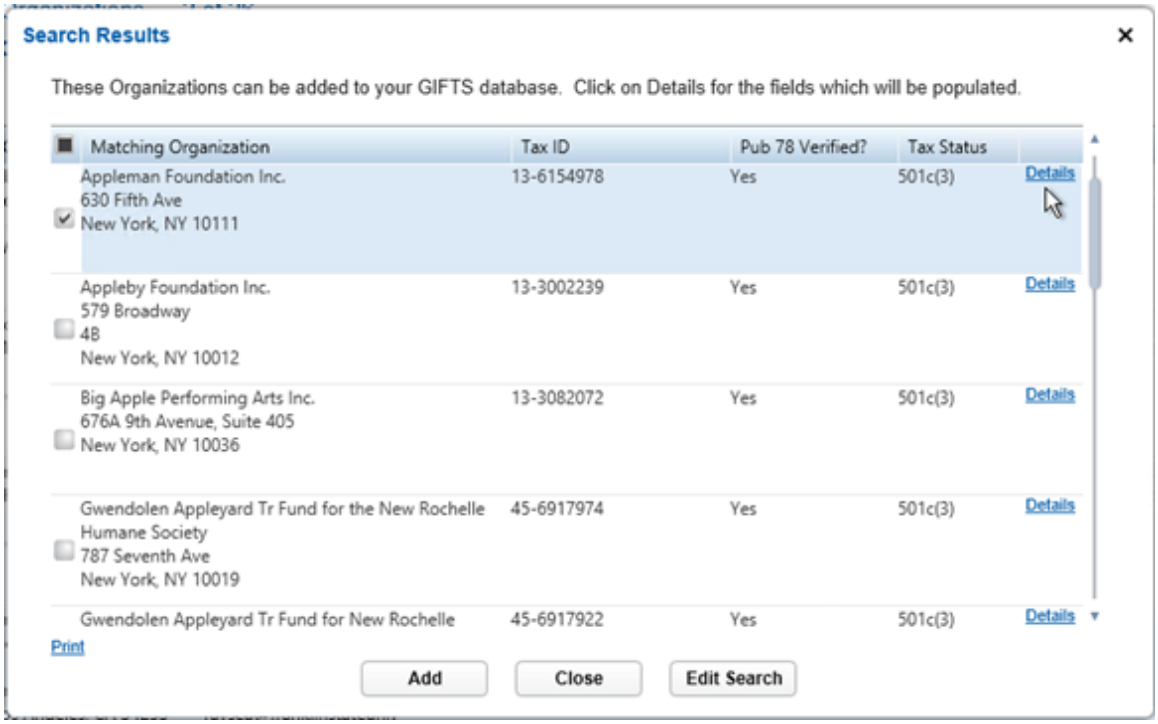
If the credentials entered into the Guidestar credentials are invalid, the user will be alerted through a message prompt and they can continue the lookup using the existing Tax Status Lookup functionality.

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.

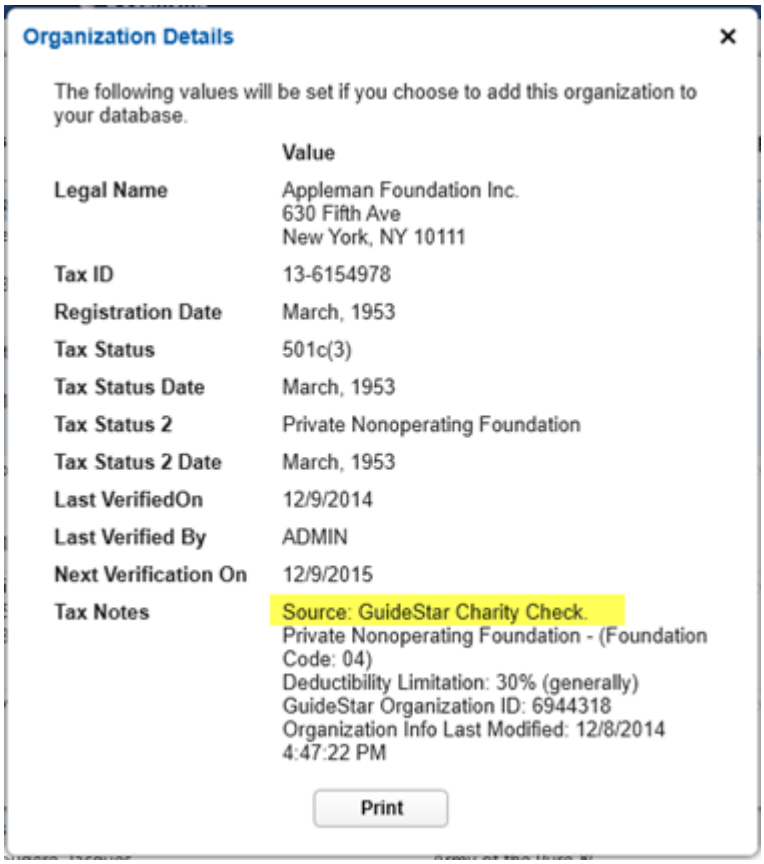


Search Results Details

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



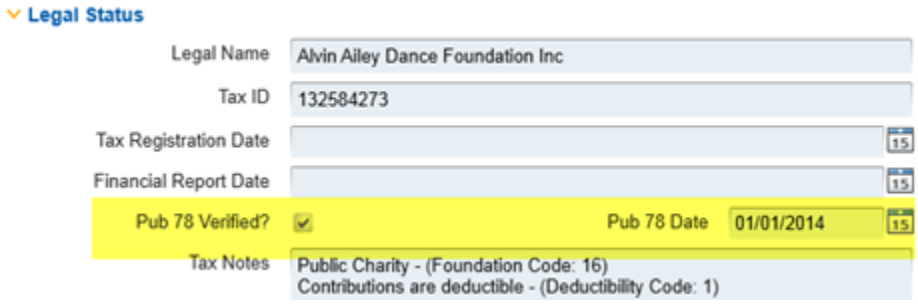
When you update an Organization with new data, the first line of Notes will state the source:

- 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.”

About Watchlists

Since September 11th, 2001, U.S. government investigations have revealed that terrorist organizations have exploited charitable organizations in order to support their operations. Since this can result in violations of economic sanctions programs, such as the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC) requirements against doing business with certain countries and individuals, charitable organizations should take steps to ensure that they are in compliance with these programs.

The Search Watchlists feature helps you comply with your own internal compliance programs by checking Organizations and/or Contacts against specific Watchlists, such as those provided by OFAC, the FBI, INTERPOL, and the European Union, among others. If one of your Organizations or Contacts appears on a watchlist, refer to the watchlist organization's policies and procedures in determining how to proceed.

NOTE: Your administrator defines the specific Watchlists searched using the **Extended Alta Settings** tool in the Administrator Module. For more information, see chapter 6 of the *GIFTS Alta Administrator's Guide*.

You can use Watchlists to check all the Organizations and Contacts in GIFTS Alta against these Watchlists on a semi-regular basis, such as quarterly or yearly.

You can either run a new query or check the current status according to the last query ran for the record.

Watchlists and GIFTS Alta Activities

Each time you use **Search Watchlists** to check Organizations or Contacts against Watchlists, an Activity is automatically created in GIFTS Alta for each record. This Activity contains the person conducting the search, the number of "hits" (or appearances) on any Watchlists, and the names of the Watchlists searched.

If the Organization or Contact does not appear on any watchlist, the associated Activity is automatically marked as Done.

If any Organization or Contact registers a "hit" on any watchlist (that is, if the watchlist contains similar information about the Organization or Contact), the associated Activity's Due Date is set as five days from the current date. During those five days, you can conduct further research to determine whether or not the Organization or Contact is the one on the watchlist. If you determine that the Organization or Contact is a "false positive," or different from the one for which it registered a hit, you can mark the associated Activity as Done, which closes it. The accuracy of hits depends on the Threshold field setting in the Extended Alta Settings in the Administrator's Module.

If you determine that the Organization or Contact is the same as the one for which it registered a hit, you do not have to do anything to the associated Watchlist Activity. After five days have passed since the creation of the Activity, it will automatically be marked as Overdue. Any Organizations or Contacts that have an associated Watchlist Activity marked as Overdue can be assumed to be on one or more Watchlists.

NOTE: If an Organization or Contact is found to be on one or more Watchlists, you can also delete them from GIFTS Alta or create an alert for the Organization or Contact that contains this watchlist information. For more information, see "Using Organization Alerts" or "Using Contact Alerts".

Watchlist Activities help create an audit trail that shows that your organization ran a compliance check.

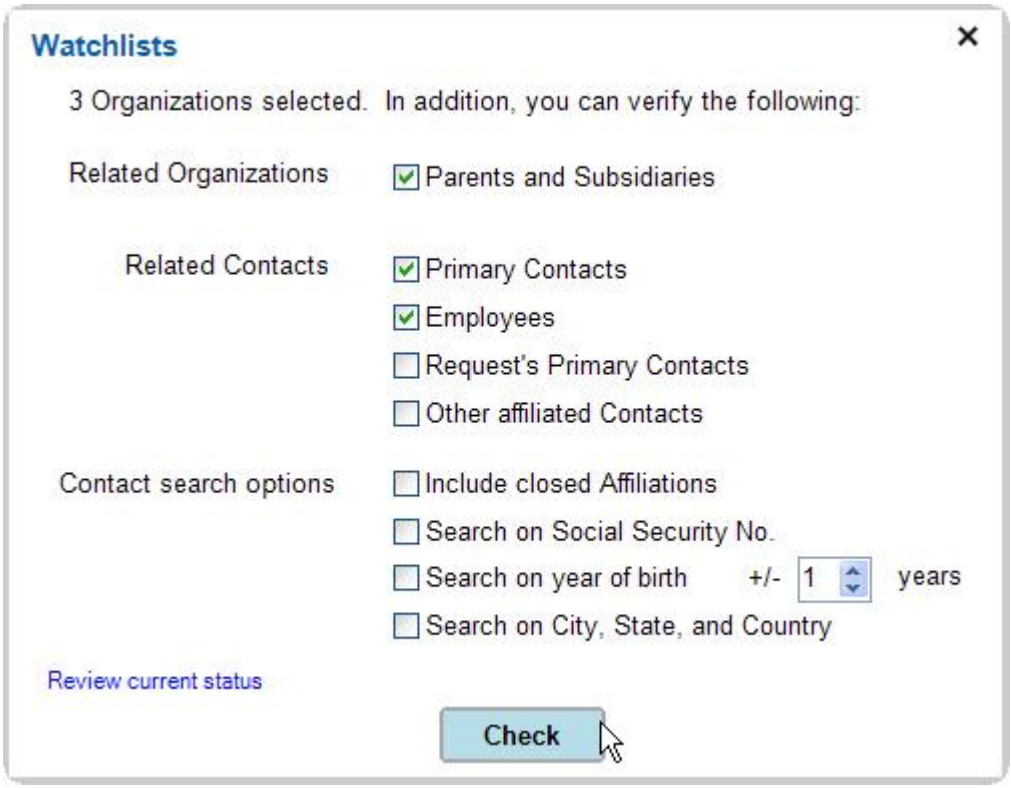
Running a New Watchlist Query

You can run a new Watchlists query if one has never been run for certain records, or if you want to check records against current watchlist information.

Every time you run a new query, you create a new Watchlists Activity for every record in your query.

To run a new Watchlists query:

1. After running an Organizations or Contacts search, select the records that you want to check. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)
2. From the **Actions** menu, choose **Search Watchlists**. The Watchlists window displays.

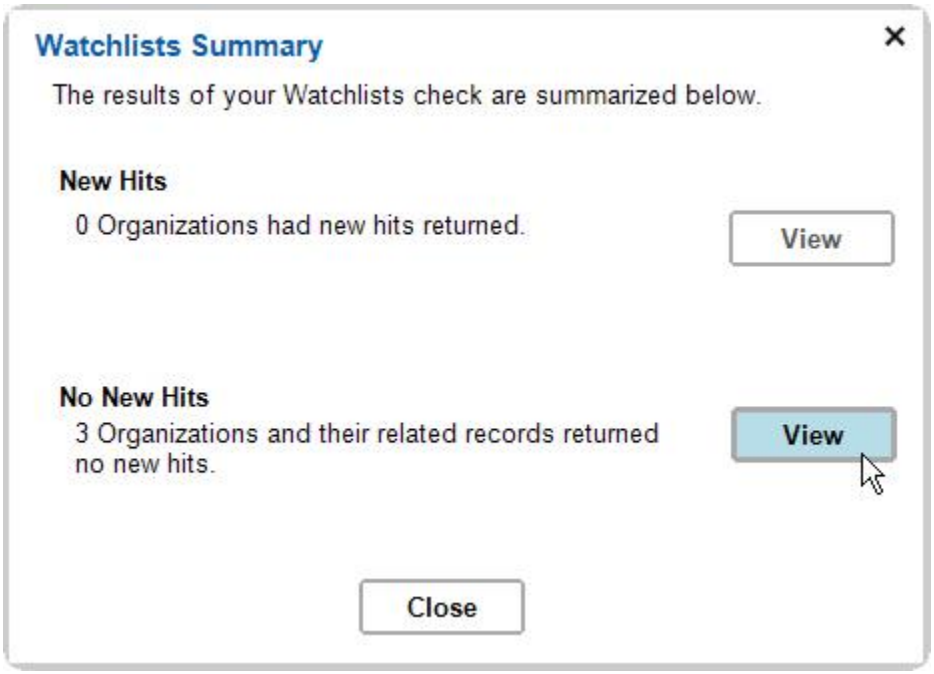


3. **Related Organizations and Contacts:** If you wish to include related records in your query, such as Primary Contacts or Employees, click the checkbox next to the appropriate field.

4. **Contact search options:** If you wish to include additional search criteria for each record, such as Social Security numbers and Date of Birth year (for Contacts), or City, State and Country (for both Contacts and Organizations), click the checkbox next to the appropriate field(s).

   IMPORTANT: By default, Watchlists only includes Organization names and/or Contact first and last names in each query.

5. Click **Search**. The Processing window displays the current number of records processed and the total number of records in the query. After the query is complete, the Watchlist Summary window displays.



Note: At any time in the query process, you can click **Cancel** in the Processing window, and then click **Yes** to display the Watchlists Summary window for the current records processed.

The Watchlists Summary window contains two sections:

New Hits: This section displays the number of records that either are being included in a query for the first time and registered a hit on watchlist(s), or registered a hit on watchlist(s) in a previous query and the most recent Watchlists Activity for that record is still open.

No New Hits: This section includes the number of records that either did not register a hit on any watchlist(s) or registered a hit on watchlist(s) in a previous query and the most recent Watchlists Plus Activity for that record has been closed.

To see the Organizations or Contacts included in each section, click **View**.

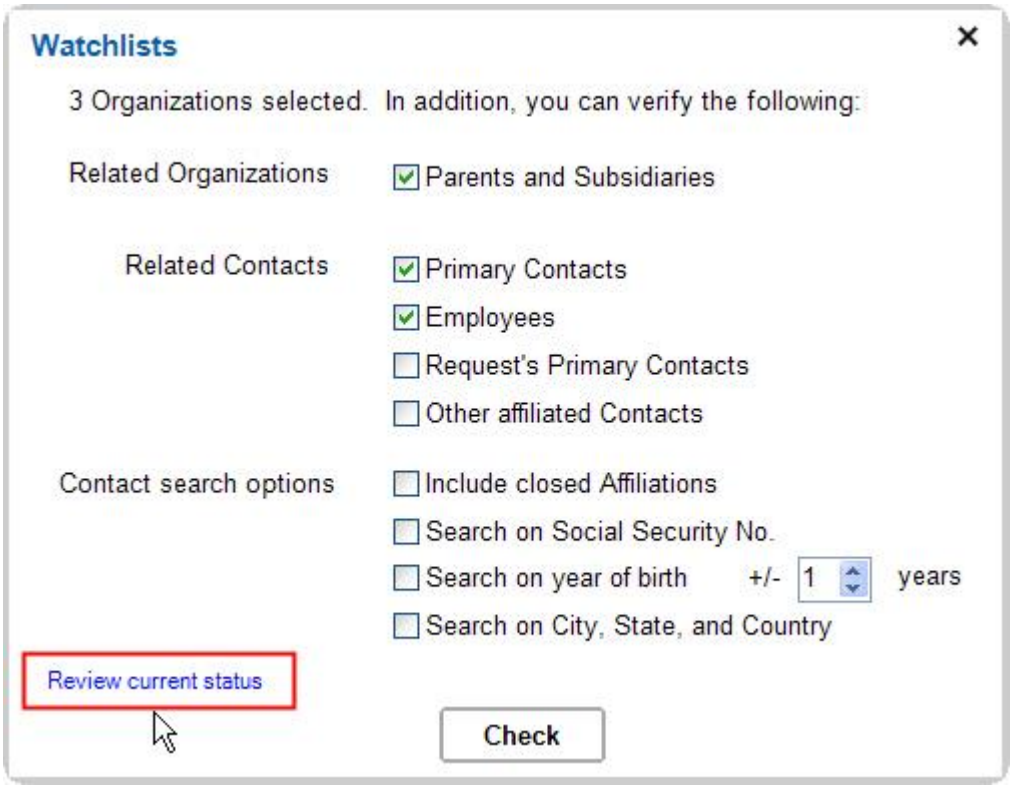
Checking the Current Status

Every time you run a new watchlist query, you create a new WatchList Activity for every record in your query.

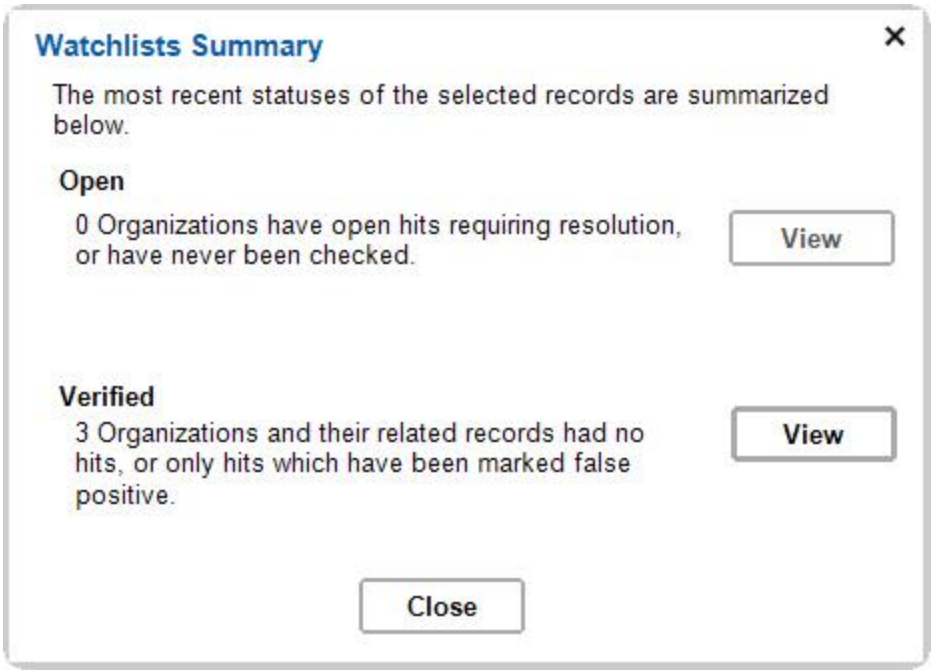
If you have already run a query and only want to view the watchlist status of one or more records, you can simply check the current status.

To check the current watchlist status of one or more records:

1. After running a search for Organizations or Contacts, select the records that you want to check. (To select a group of records, hold down the SHIFT or CTRL key as you click on records.)
2. From the **Actions** menu, choose **Search Watchlists**. The Watchlists window displays.



3. **Related Organizations and Contacts:** If you wish to include related records in your query, such as Primary Contacts or Employees, click the checkbox next to the appropriate field.
4. **Contact search options:** If you wish to include additional search criteria for each record, such as Social Security numbers and Date of Birth year (for Contacts), or City, State and Country (for both Contacts and Organizations), click the checkbox next to the appropriate field(s).
5. Click **Review current status** link. The Watchlist Summary window displays.



The Watchlists Summary window contains two sections:

Open: This section displays the number of records that either have never been included in a query or have registered a hit on watchlist(s) in a previous query and the most recent Activity for that record is still open.

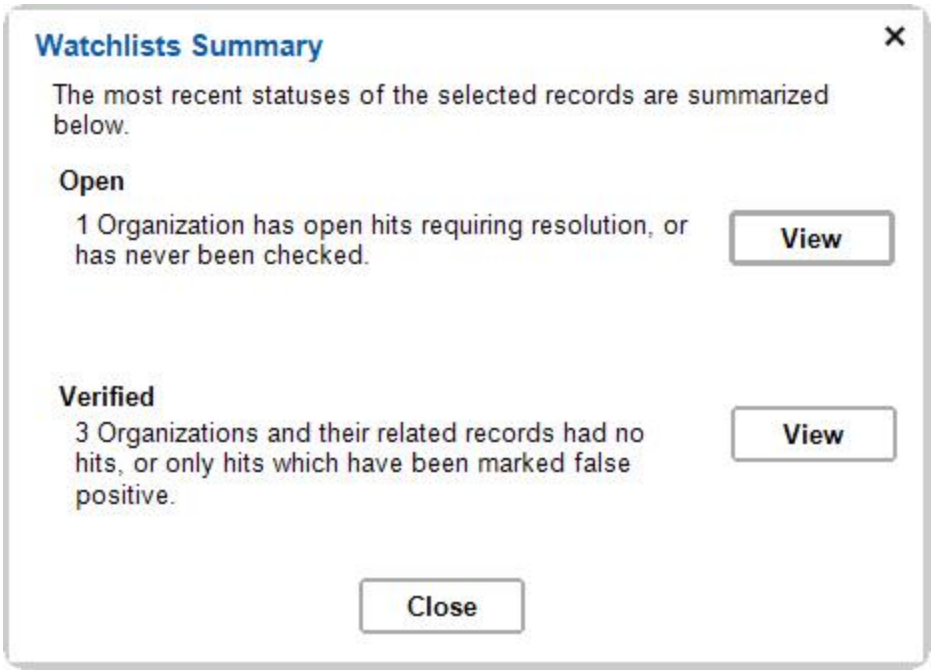
Verified: This section displays the number of records that either did not register a hit on any watchlist(s) for any previous queries or registered a hit on watchlist(s) in a previous query and the most recent Activity for that record has been closed.

To see the Organizations or Contacts included in each section, click **View**.

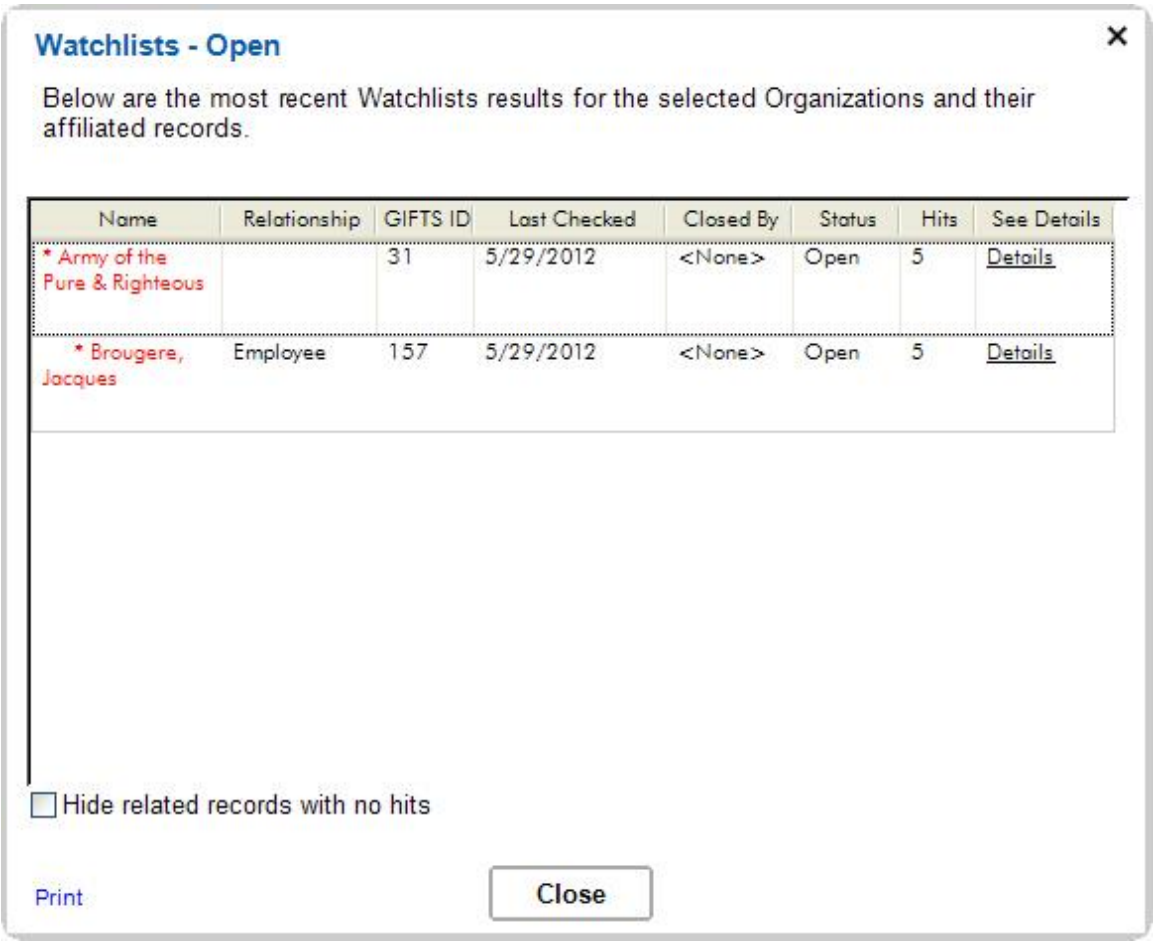
Viewing Open Record Results

After checking the current watchlist status for records, you can view detailed query results for records appearing in the "Open" section of the Watchlists Plus Summary window. These are records that either have never been included in a query or have registered a hit on watchlist(s) in a previous query and the most recent Watchlists Plus Activity for that record is still open.

1. From the Open section of the Watchlists Summary window, click **View**. The Watchlists Open window displays.



The Watchlists - Open window contains the following fields:



Field	Description
Names	The Organization name or the Contact's first and last name. Names displayed in red text with an asterisk next to them are records that registered hits. Names displayed in black text are records that registered no hits. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.
Relationships	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented.
GIFTS ID	The GIFTS ID of the Contact or Organization.
Last Checked	The date of the most recent query which included this record. This is also the Create Date of the most recent Watchlists Activity for this record.
Closed By	The name of the person who marked the record's associated Activity as Done. If this field displays <none>, the associated Activity has not been marked as Done.
Status	This field displays one of the following messages: • **Verified:** The most recent associated Watchlists Activity has been marked as Done. • **Open:** The most recent associated Watchlists Activity is still open. • **<none>**: The record has no Watchlists Plus Activity associated with it, and has therefore never been included in a query.
Hits	The number of Watchlists on which the Organization or Contact registered a hit.
See Details	Click **Details** to view the watchlist information that registered a hit for this record, and to update

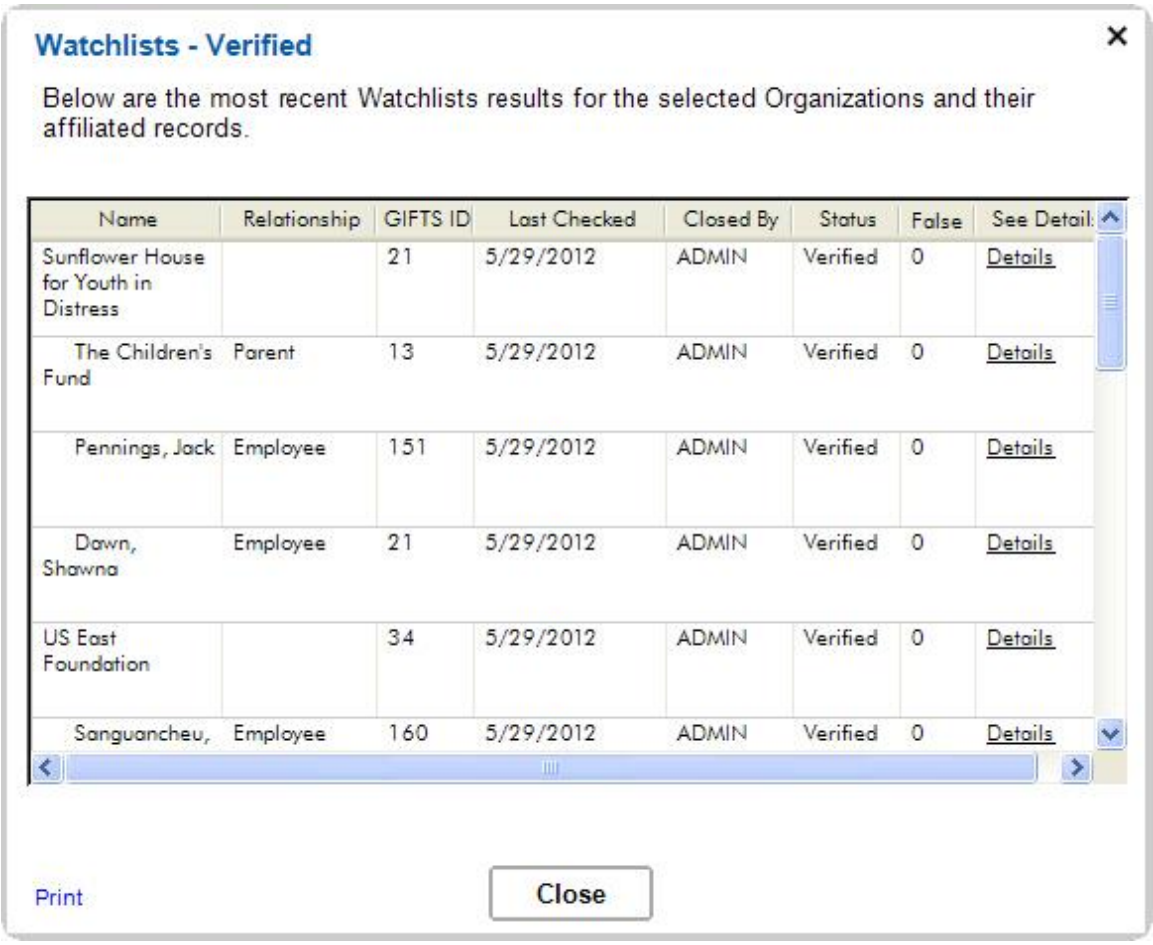
	information for the Watchlists Activity associated with this record.
Hide related records with no hits	Click this checkbox to hide affiliated records that returned no hits.

2. Choose from the following options on the Watchlists - Open window.
    - **Print** - Prints the displayed information
    - **Close** - Closes the window

Viewing Verified Record Results

After checking the current watchlist status for records, you can view detailed query results for records appearing in the “Verified” section of the Watchlists Summary window. These are records that either did not register a hit on any watchlist(s) in any previous queries or registered a hit on watchlist(s) in a previous query and the most recent Activity for that record has been closed.

1. From the Verified section of the Watchlists Summary window, click **View**. The Watchlists - Verified window displays.



The Watchlists Plus Open window contains the following fields:

Field	Description
Names	The Organization name or the Contact's first and last name. Names displayed in red text with an asterisk next to them are records that registered hits. Names displayed in black text are records that registered no hits. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.
Relationships	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated

	record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented.
GIFTS ID	The GIFTS ID of the Contact or Organization.
Last Checked	The date of the most recent query which included this record. This is also the Create Date of the most recent Watchlists Activity for this record.
Closed By	The name of the person who marked the record's associated Activity as Done. If this field displays <none>, the associated Activity has not been marked as Done.
Status	This field displays Verified, which indicates that the most recent associated Watchlists Plus Activity has been marked as Done.
False Pos	The number of false positives for the record. A "false positive" occurs if a record registers a hit on a watchlist, but is determined to not be the one on the watchlist. The record's most recent associated Watchlists Plus Activity has therefore been marked as Done.
See Details	Click **Details** to view the watchlist information that registered a hit for this record (that was determined to be a false positive), and to update information for the Watchlists Activity associated with this record. Note: This link is inactive if the record registered no hits that were determined to be false positives.

2. Choose from the following options on the Watchlists - Verified window.
   - **Print** - Prints the displayed information
   - **Close** - Closes the window

Viewing New Hits Record Results

After running a new query, you can view detailed query results for records appearing in the "New Hits" section of the Watchlists Summary window. These are records included in a query for the first time that registered a hit on watchlist(s), and records that registered a hit on watchlist(s) in a previous query that have the most recent Watchlists Activity still open.

1. From the New Hits section of the Watchlists Summary window, click **View**. The Watchlists - New Hits window displays.

The Watchlists - New Hits window contains the following fields:

Field	Description
Names	The Organization name or the Contact's first and last name. Names displayed in red text with an asterisk next to them are records that registered hits. Names displayed in black text are records that registered no hits. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.

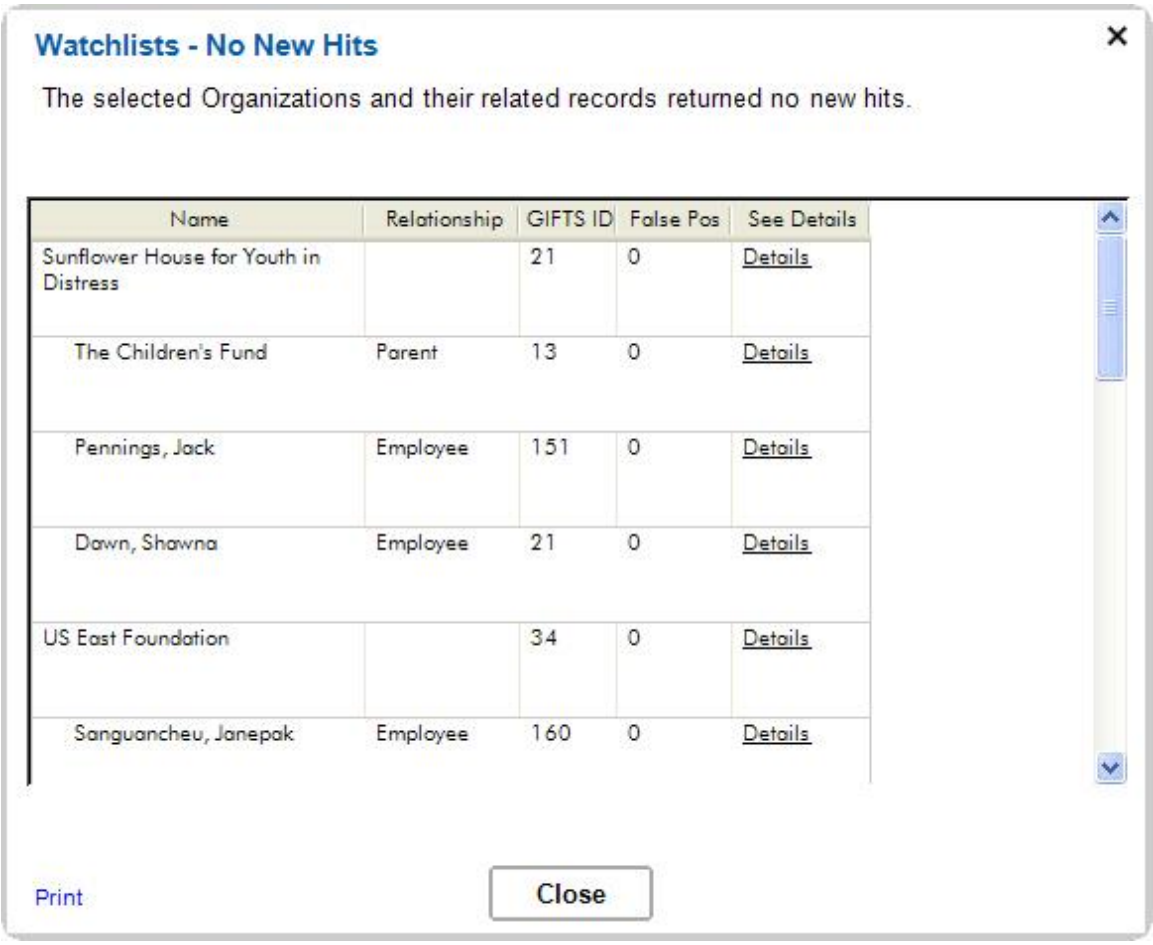
Relationships	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented.
GIFTS ID	The GIFTS ID of the Contact or Organization.
Hits	The number of Watchlists on which the Organization or Contact registered a hit.
See Details	Click **Details** to view the watchlist(s) information that registered a hit for this record, and to update information for the Watchlists Activity associated with this record. Note: This link is inactive if the record registered no hits.
Hide related records with no hits	Click this checkbox to hide records that registered no hits.

2. Choose from the following options on the Watchlists - New Hits window.
   - **Print** - Prints the displayed information
   - **Close** - Closes the window

Viewing No New Hits Record Results

After running a new query, you can view detailed query results for records appearing in the “No New Hits” section of the Watchlists Summary window. These are records which either did not register a hit on any watchlist(s) for this query or registered a hit on watchlist(s) in a previous query and the most recent Watchlists Activity for the record has been closed.

1. From the No New Hits section of the Watchlists Summary window, click **View**. The Watchlists - No New Hits window displays



The Watchlists - No New Hits window contains the following fields:

Field	Description
Names	The Organization name or the Contact's first and last name. Names that are not indented are records you specifically selected to include in this query. Indented names are records affiliated with the selected records, and are displayed if you selected to include affiliated records in your query.
Relationships	If this field contains no information, it is a record you specifically selected to include in your query. If this field contains information, it is for an affiliated record, and describes the relationship between it and the selected record. The selected record appears above it and has a name that is not indented.

GIFTS ID	The GIFTS ID of the Contact or Organization.
False Pos	The number of false positives for the record. A “false positive” occurs if a record registers a hit on a watchlist, but is determined to not be the one on the watchlist. The record’s most recent associated Watchlists Plus Activity has therefore been marked as Done.
See Details	Click **Details** to view the watchlist information that registered a hit for this record (that was determined to be a false positive), and to update information for the Watchlists Plus Activity associated with this record. Note: This link is inactive if the record returned no hits that were determined to be false positives.

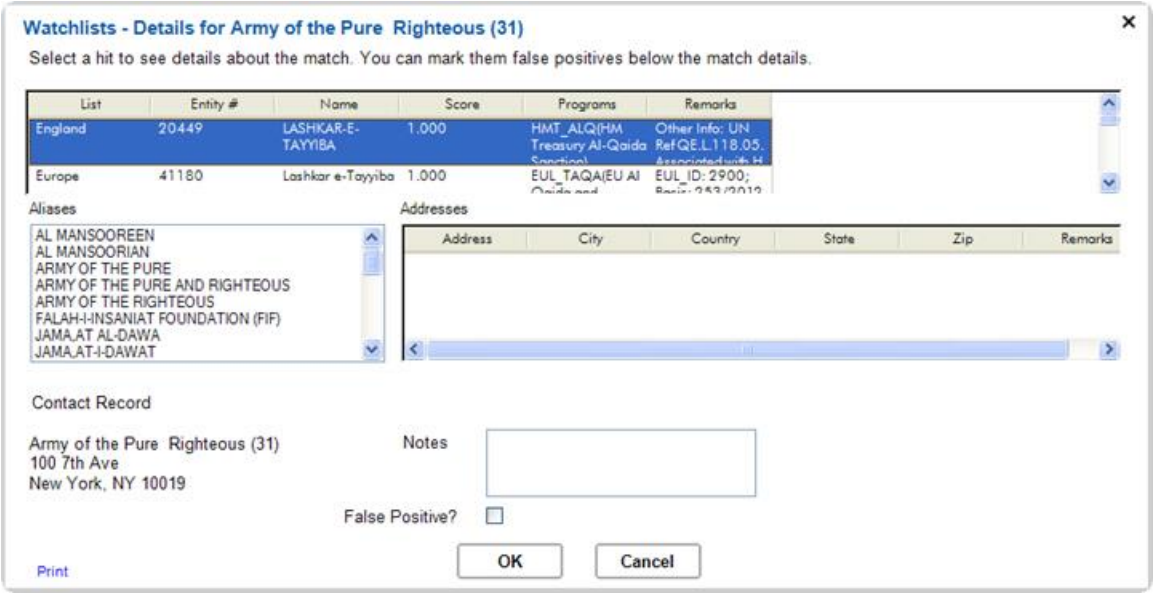
2. Choose from the following options on the Watchlists - No New Hits window.
   - **Print** - Prints the displayed information
   - **Close** - Closes the window

Viewing Watchlist Information and Updating Activities

After viewing detailed query results, you can view the watchlist information for which a record registered a hit, and update information for the Watchlists Activity associated with that record.

This watchlist information is downloaded from each watchlist, and allows you to view additional information in order to determine whether or not the hit is a false positive or not.

1. From the **See Details** column of the Watchlists - Open window or the Watchlists - New Hits window, click **Details**. The Watchlists Details window displays.



The Watchlists - Details window contains the following fields:

Field	Description
List	The name of the watchlist that registered a hit for the record. Note: The information in the Alias and Addresses sections changes if you select a new watchlist.
Entity #	Proprietary information from the watchlist.
Name	The name of the Contact or Organization.
Score	Proprietary information from the watchlist.
Programs	Proprietary information from the watchlist.
Remarks	Proprietary information from the watchlist.
Aliases	Any aliases for the Contact, if applicable.
Addresses	Address information for the Organization or Contact.
GIFTS Record	The data in GIFTS that registered a hit on the watchlist.
Notes	Enter any information to include as notes in the Watchlists Activity associated with this record.
False Positive	Click this checkbox if this record is not the one for which it registered a hit on the watchlist(s). This marks the Watchlists Activity associated with this record as Done.

	Note: You must have the appropriate permission in order for this field to be active.

2. Choose from the following options on the Watchlists - Details window.
    - **Print** - Prints the displayed information
    - **OK** - Saves any updated Activity information and closes the window.
    - **Close** - Closes the window

GIFTS Alta Extensions

GIFTS Alta Extensions contain two tools which must be installed manually after the main installation is complete.

- GIFTS Alta Link
- GIFTS Alta Reminders

About GIFTS Alta Link for use with Outlook

This chapter describes how to use GIFTS Alta Link for use with Outlook.

GIFTS Alta Link allows you to send Outlook email to GIFTS Alta as a Mail Activity.

If you have Document Manager, you can store the email and/or email attachments as documents. During the linking process, you can choose to link the Mail Activity with a record in GIFTS Alta.

Depending on how GIFTS Alta Link has been configured, the body of the email will be saved in the Long Notes section of the Mail Activity, or the email will be saved as a message (.msg) file in Document Manager.

Also, depending on how GIFTS Alta Link has been configured, email attachments may be exported into GIFTS Alta as External Document Activities.

NOTE: The examples in this section have the body of the email saved in the Long Notes section of the Mail Activity.

For more information about configuring Link, see “Setting Up GIFTS Alta Link Security” in the GIFTS Alta Administrator's Guide.

Working with the GIFTS Alta Link Icon

After you install GIFTS Alta Link, a **Links** icon appears as a MicroEdge daisy on your Outlook Standard toolbar. After selecting any sent or received email, you can click this icon to export it to GIFTS Alta.

NOTE: If you have the Standard toolbar hidden, the icon will not appear. Also, if Word is your default email editor, ‘Send to GIFTS’ appears in place of the icon in the email window.

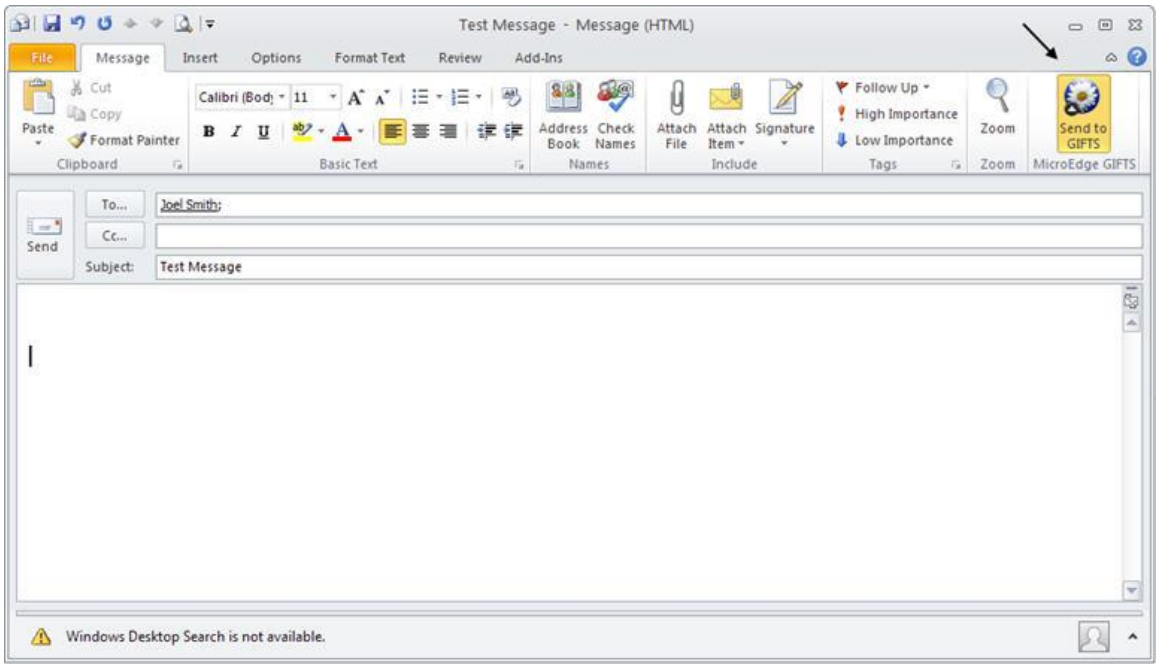
Outlook 2007/2010 Users:

The Send to GIFTS button will be available in the following locations:

- The **Add-Ins** tab
- The **Message** tab's toolbar for individually opened emails.

For any unsent message, you can click the **Send to GIFTS** button to set it to automatically export the message to GIFTS Alta when the email is sent. The Send to GIFTS button will stay depressed after you click it.

The image below displays an unsent email message in which the **Send to GIFTS** button has been depressed.



IMPORTANT: An email with a depressed **Send to GIFTS** button is automatically exported to GIFTS Alta just before the email is sent, so a Mail Activity is created in GIFTS Alta regardless of whether or not the email is delivered to its recipient(s). If you do not want a Mail Activity in GIFTS Alta for an undelivered email that did not reach its intended recipient(s), you must manually delete the Mail Activity.

Exporting Outlook Email into GIFTS

With GIFTS Alta Link installed, you can export one or more Outlook email messages to GIFTS Alta.

To export Outlook email and create a new Mail Activity in GIFTS Alta:

1. Select one or more email messages in Outlook.

   Note: You cannot export any unsent emails into GIFTS Alta.

2. Got to the **Add-Ins** tab and click the **Send to GIFTS** button.

   Note: If you have previously exported this email to GIFTS Alta, a message appears asking you if you want to export it again.

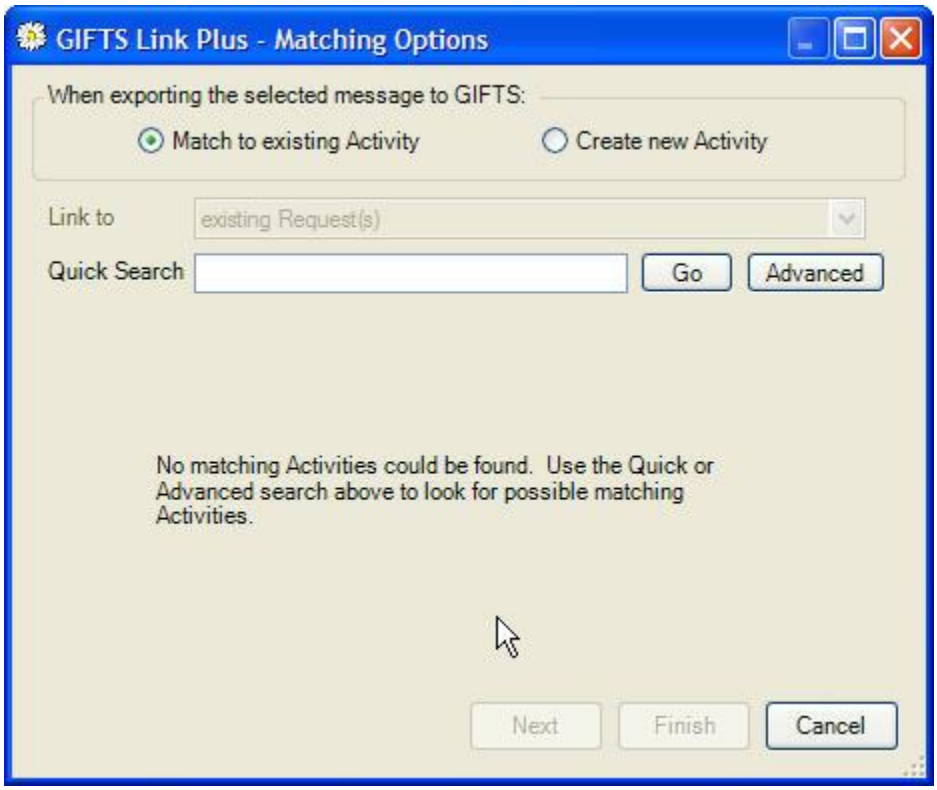
TIP: If you want to see which emails have already been exported to GIFTS Alta, you can add the **MERECID** column to your Outlook Inbox. This column displays a GIFTS Activity ID if the email has already been exported to GIFTS.

To add this column:

i. Right-click on a column header and select '**Field Chooser**'.
ii. On the **Field Chooser** drop-down menu on top, select 'User-defined fields in Inbox'.
iii. Drag and drop '**MERECID**' to any Inbox column heading location.

NOTE: You must have exported at least one mail message previously to GIFTS in order for the **MERECID** field to be available on the list.

3. If you are not currently logged into GIFTS Alta, a GIFTS Login dialog box appears. Enter your GIFTS login information and click **OK**. The GIFTS Alta Link Matching Options window appears.



4. In the two radio buttons at the top of the window, select whether you would like to **Match to existing Activity** or **Create new Activity** in GIFTS Alta.

Note: If you select **Match to existing Activit**y, your new Mail Activity will either overwrite or create a new Activity, depending on your Link preferences. For more information, see "Setting Up GIFTS Alta Link Security" in the GIFTS Alta Administrator's Guide.

5. Using the **Link to** drop-down menu, select the kind of existing GIFTS record to which you want to link the email(s), or if you do not want to link the email(s) to any existing GIFTS record.

   Note: This field is only active if you selected the Create new Activity radio button.

6. Enter search text in the Quick Find text box to help find the GIFTS record(s) to which you want to link the email(s), and then click **Find**. Possible matches display in the GIFTS Alta Link Matching Options window.

   Note: For more information about using this field as well as the Advanced search functionality, refer to "Linking Email to Existing GIFTS Records".

7. Enable the checkbox next to the GIFTS record(s) to which you want to link the email(s) and then click **Next**. The **GIFTS Link Plus Export Options**window appears.

   Note: You can link an email to multiple GIFTS records (except for Activities), and you can link multiple emails to a single GIFTS record, but you cannot link multiple emails to multiple GIFTS records.

   Note: Click **Change** next to the Contact or Organization fields to change these records. These fields are not active if you are exporting multiple emails.

8. Enter a Title, Keywords, and Notes, if necessary.
9. If you want to include any email attachment(s) in the export, enable the **Download attachments separately** checkbox.

   Note: This field only appears if Link is configured to allow email attachments, and your email contains an attachment. In order to download email attachments, you must have the Document Manager.

10. If you selected to **Match to an existing Activity**, enable the **Delete existing Activity** if you want this Activity to replace the existing one.

    Note: This field only appears if your Link preferences have been configured to allow this option in the Administrator's Module.

11. Click **Finish**. A process monitor appears.
12. Click **Close**.

    Note: You can click **Save Log** to save this log information as a text (.txt) file, or Print Log to print it. Please note that this is the only log created for the Mail Activity, so if you do not save it, you will have no history of it.

Linking Email to Existing GIFTS Records

This section covers how to use any of the two search methods available in GIFTS Alta Link - Matching Options form to locate the correct GIFTS record to which you want to link the Outlook email.

Working with the Quick Search

Working with Advanced Search.htm

Working with the Quick Search

Depending on which selection you make in the Link to drop-down menu, you can enter search criteria in the **Quick Search** field and click **Go** to display all related GIFTS records containing that criteria.

The Quick Search uses the following logic to find possible matches, depending on the selection in the Link to drop-down menu:

Existing Request(s) The functionality searches first for a Request ID that matches the search criteria. If no match is found, the functionality searches for a Request Reference Number that matches the search criteria. If no match is found, the functionality then searches for a Project Title that contains the search criteria.

Existing Organization(s) The functionality searches for any Organization Name that contains the search criteria.

Existing Contact(s) If the search criteria contains a space, the functionality uses the first word to search for a Contact First Name that matches the search criteria, and uses the second word in the search criteria to search for a Contact Last Name that matches the search criteria. If no match is found, the functionality then searches for a Contact Last Name that contains the search criteria.

Working with Advanced Search

The GIFTS Alta Link **Advanced** search functionality works similarly to the Query Builder functionality in GIFTS Alta.

The Advanced search functionality appears when you click **Advanced** on the *GIFTS Link - Matching Options* window.

To use the Advanced search functionality to export Outlook email and create a new Mail Activity in GIFTS:

1. Select one or more email messages in Outlook.
2. Click the **Send to GIFTS** button.

   Note: If you have previously exported this email to GIFTS, a message appears asking you if you want to export it again.

3. If you are not currently logged into GIFTS Alta, a GIFTS Login dialog box appears. Enter your GIFTS login information and click **OK**. The GIFTS Link - Matching Options window appears.
4. At the top of the window, select to link the email(s) to an existing Mail Activity currently in GIFTS if it is not already selected.

   Note: Your new Mail Activity will either overwrite or create a new Activity, depending on your Link Plus preferences. For more information, see “Setting Up Link Security” in the GIFTS Alta Administrator's Guide.

5. Click **Advanced**. The Search for Activities window appears.
6. After selecting a field in the **Available Fields** drop-down menu, click **Add** to add a search expression to the search criteria. A window allowing you to enter specific search parameters for that expression appears.

   Note: The drop-down menu on the left side of the window allows you to enter an operator, such as “is”, “begins with” or “contains.” The field on the right side allows you to enter a value.

7. Enter search parameters for the field, and then click **OK**. The expression appears in the Search for Activities window.

   TIP: Click Edit to edit the search parameters for a selected expression, or Remove to remove any selected expression. Click Clear to remove all expressions from the search criteria.

8. Add more search expressions to the search criteria, if necessary.
9. Click **Finish**. Any records matching the search criteria appear.
10. Enable the checkbox next to the GIFTS record(s) to which you want to link the email(s) and then click Next. The GIFTS Alta Link Export Options window appears.

    Note: You can link an email to multiple GIFTS records, and you can link multiple emails to a single GIFTS record, but you cannot link multiple emails to multiple GIFTS records.

    Note: Click **Change** next to the Contact or Organization fields to change these records. These fields are not active if you’re exporting multiple emails.

11. Enter a Title, Keywords, and Notes, if necessary.
12. If you want to include any email attachment(s) in the export, enable the Download attachments checkbox. Note: This field only appears if GIFTS Alta Link is configured to allow email attachments, and your email contains an attachment. In order to download email attachments, you must have the Document Manager.
13. If you selected to match this Activity to an Existing Activity, enable the Delete existing Activity if you want this Activity to replace the existing one.

    Note: This field only appears if your Link preferences have been configured to allow this option in the Administrator's Module.

14. Click **Finish**. A process monitor appears.

15. Click **Close**.

Note: You can click **Save Log** to save this log information as a text (.txt) file, or Print Log to print it. Please note that this is the only log created for the Mail Activity, so if you do not save it, you will have no history of it.

Working with GIFTS Alta Link Email Activities

After you export an Outlook email into GIFTS, you can view the associated Mail Activity in GIFTS. The Mail Activity appears in both the Activities and Documents tabs in GIFTS. The image below displays a Mail Activity.

- If you selected the 'Save Messages in Activity Notes' preference in the Link setting section of the Alta Extended Settings utility, the email content is displayed in the Long Notes section of the Mail Activity.
- If you selected the 'Save messages as .msg files' preference in the GIFTS Alta Link settings section of the Alta Extended Settings utility, the email content is attached to the Mail Activity as an .msg file. You can view the .msg file containing the email content by clicking View File on the Mail Activity, or by zooming in on the Activity and clicking the Documents tab.

For more information about the GIFTS Alta Link settings, see "Setting Up GIFTS Alta Link Security" in the GIFTS Alta Administrator's Guide.

Working with Email Attachments in GIFTS Alta

If the email contains attachments, and you selected the 'Download Attachments' checkbox while exporting the email, each email attachment appears in GIFTS Alta as an External Document Activity.

When one email with one attachment was exported to GIFTS using Link, a Mail Activity and an External Document Activity are created in GIFTS Alta.

The Activities can be displayed in the Workspace from a search for **Activities** or **Documents**.

NOTE: If you do not have the Document Manager, you cannot export any email attachments to GIFTS Alta, and no External Document Activities will be created.

About Reminders

NOTE: The GIFTS Alta Reminders extension is optional and must be installed manually in addition to the GIFTS Alta main install. For more information on installing the Reminders extension, please refer to chapter 11 of the *GIFTS Alta Installation Guide*.

This chapter describes how to use the GIFTS Alta Reminders Extension to create or modify reminders for GIFTS Alta Activities and Requirements.

Sending reminders with the standard GIFTS software entails running regular searches for upcoming or overdue items and using the correspondence feature to manually send reminders. Reminders Plus automates this process, saving you a significant amount of time and ensuring that reminders are never mistakenly forgotten.

With Reminders Plus you can:

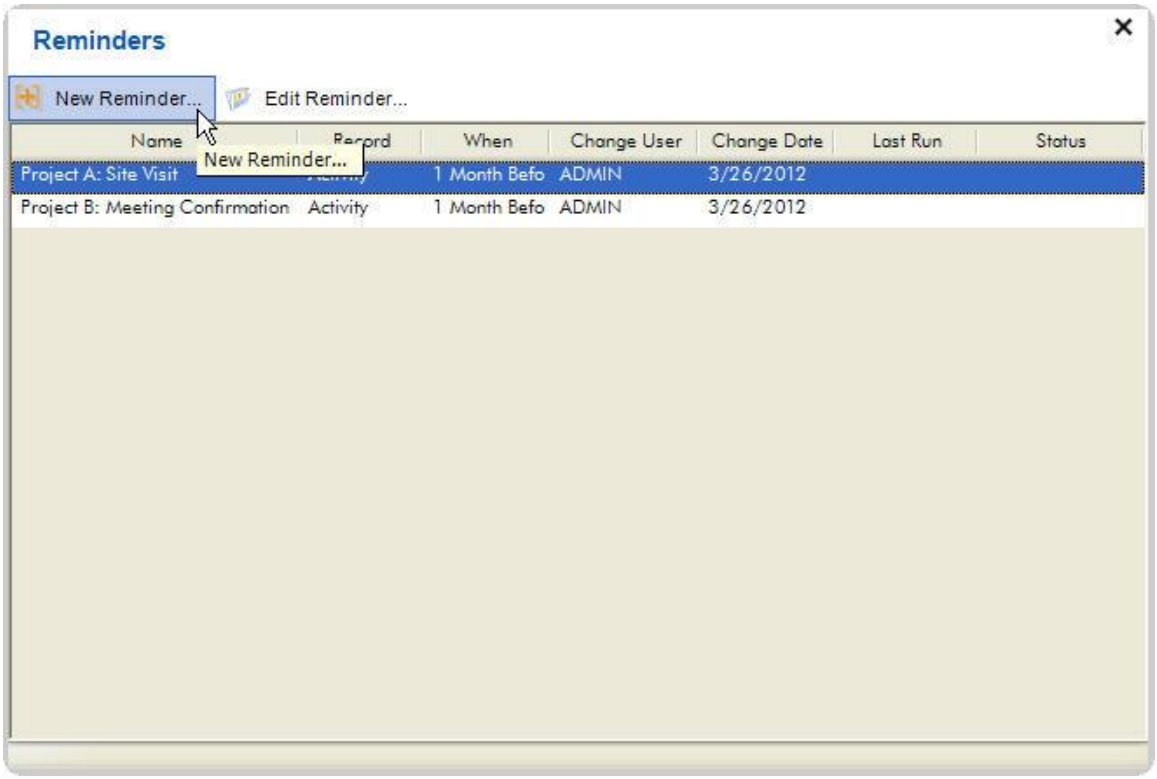
- **Schedule automated reminders:** You can schedule a reminder to be sent for any GIFTS Activity or Requirement type that does not have a Done date or Received date, respectively. For example, you can set up a reminder on Progress Reports to be sent one week prior to the due date and GIFTS will automatically send out emails to the recipient/s you select.
- **Send reminders to multiple recipients:** You can select an unlimited number of recipients for your reminders, specifying To, Cc, or Bcc for each. In addition to grantee contacts and staff from your GIFTS database, you can manually enter additional email addresses. You can even send reminders to mobile phones with SMS capability. You also have the ability to exclude contacts on an individual level.
- **Keep a record of sent reminders:** You can choose to create an Activity for each reminder sent. Activity notes include the recipient names and addresses and also the body text of reminders, providing a full record of all correspondence.
- **Specify a time to send the reminders:** Reminders Plus can be set up to run on a daily basis at a time specified by you using the Windows Task Scheduler.

Creating a Reminder

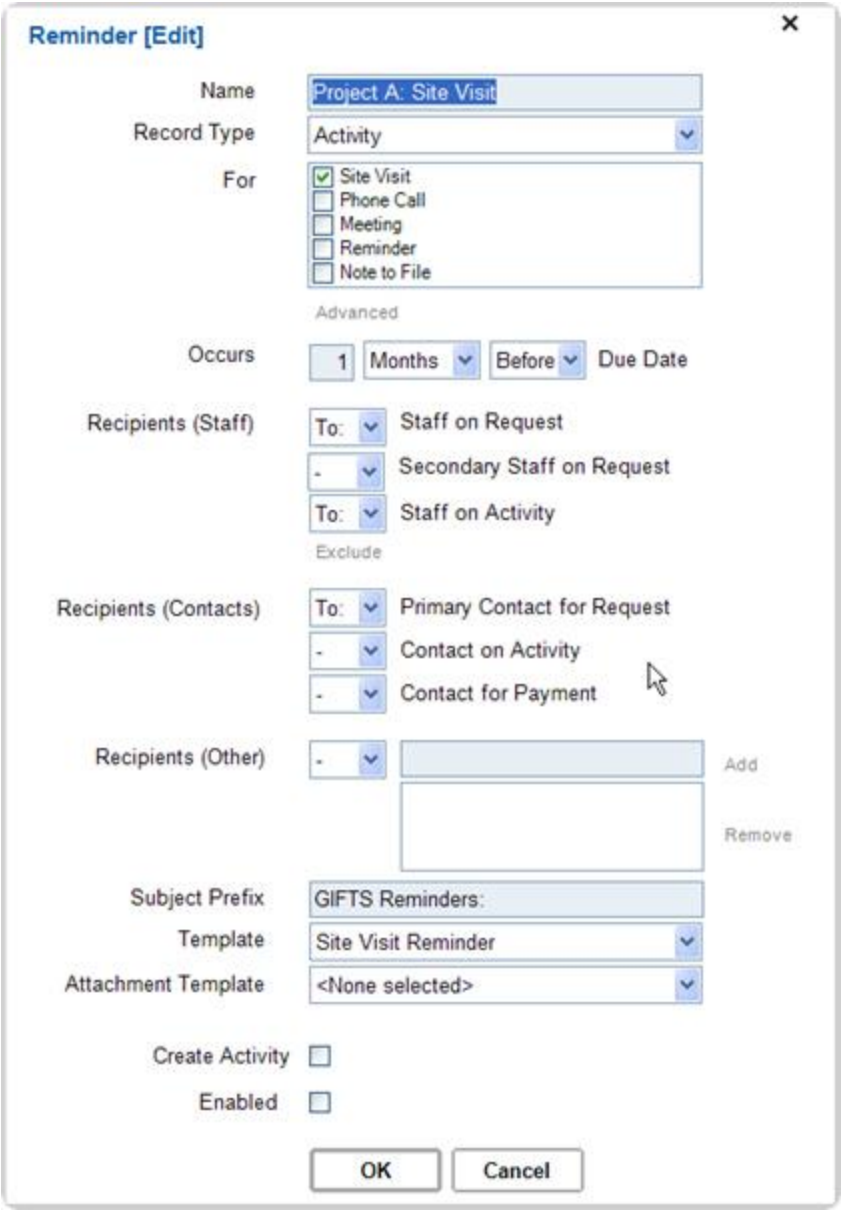
To create a new reminder for an Activity or a Requirement:

1. In GIFTS Alta, go to **User menu > Reminders** (You do not need to have an Activity or Requirement selected.) The Reminders Summary form opens. If you have any existing reminders, they are displayed here.

2. Click **New Reminder** on the top left.



3. When the New Reminder form opens, enter a **Name** for your reminder. The name is used to recognize your reminder within GIFTS Alta only and does not display to recipients.



4. In the **Record Type** field, select **Activity** or **Requirement**.
5. In the **For** field, select all the record types for which you want this reminder to be sent. The options available in this field will depend on the Record Type selected above.

   You can create a very generic reminder and use it for all record types, or you could create a different reminder for each type.

   Note: The **Advanced** button is for creating reminders based on criteria other than Activity and Requirement due dates, using SQL queries. An example could be if you only wanted a reminder sent for Requests within a specific Program Area. If you are interested in custom advanced functionality, please contact MicroEdge Custom Programming Services for more information.

6. In the **Occurs** fields, specify the date on which you want the reminder sent relative to the due date of the Activity or Requirement. You can have reminders sent X days, weeks, or months before or after a due date. If you want a reminder sent on the due date, set it to be sent 0 days before or after the due date.

   Note: If you set your reminder to be sent 0 weeks or months before or after the due date, and you send reminders on a daily basis, your recipients will get a reminder every day of the week or month in which their Activity or Requirement is due.

7. In the **Recipients (Staff/Contacts)** sections of the form, select **To, Cc, or Bcc** for any contact and staff options you want. If you leave a field blank, the corresponding recipient will not receive an email. Reminders can also be set to go to Secondary Staff on the Request as well.

   Note: Inactive contacts and staff will not receive reminders.

8. For Staff Recipients, if there are certain staff who never want reminders, you can block them by clicking **Exclude.** This opens a separate window with a list of active staff users. Select any users you want to exclude from the reminder and click **OK**. Note that Exclude settings override any other Recipient selections you have made.
9. For **Other**, select To, Cc, Bcc, or SMS.

   - For To, Cc, and Bcc, enter an email address.
   - For SMS, enter a 10-digit mobile phone number with SMS (short message service) messaging capability.
   - Click **Add**.

10. Repeat for each 'Other' contact you want to add. To remove an 'other' contact, select the address and click **Remove**.
11. In the **Subject Prefix** field, enter any text you want to display as a prefix on the subject line of your message. (The subject line of your message is determined by your mail template.) You can leave this field blank if you prefer.
12. From the **Template** drop-down menu, select the email template you want to use for the reminder. You must use an existing GIFTS email correspondence template; if nothing displays in the drop-down menu, you do not have any templates set up in GIFTS Alta.

    Note: Please refer to "Creating a New Correspondence Template" in the GIFTS Alta Administrator's Guide for instructions on adding templates.

13. The **Attachment Template** menu can be used to attach an additional correspondence template to the reminder. (Perhaps a form that needs to be filled out and returned.)
14. If you want an Activity to be created for your reminder, select the **Create Activity** check box. If created, Activity notes include the recipient names and addresses and also the body text of reminders, providing a full record of all correspondence.
15. By default, new reminders are **Enabled**, meaning they are active and will be sent. To disable your reminder, clear the Enable box. Disabled reminders are not sent when Reminders runs.
16. Click **OK** to complete creating the reminder.

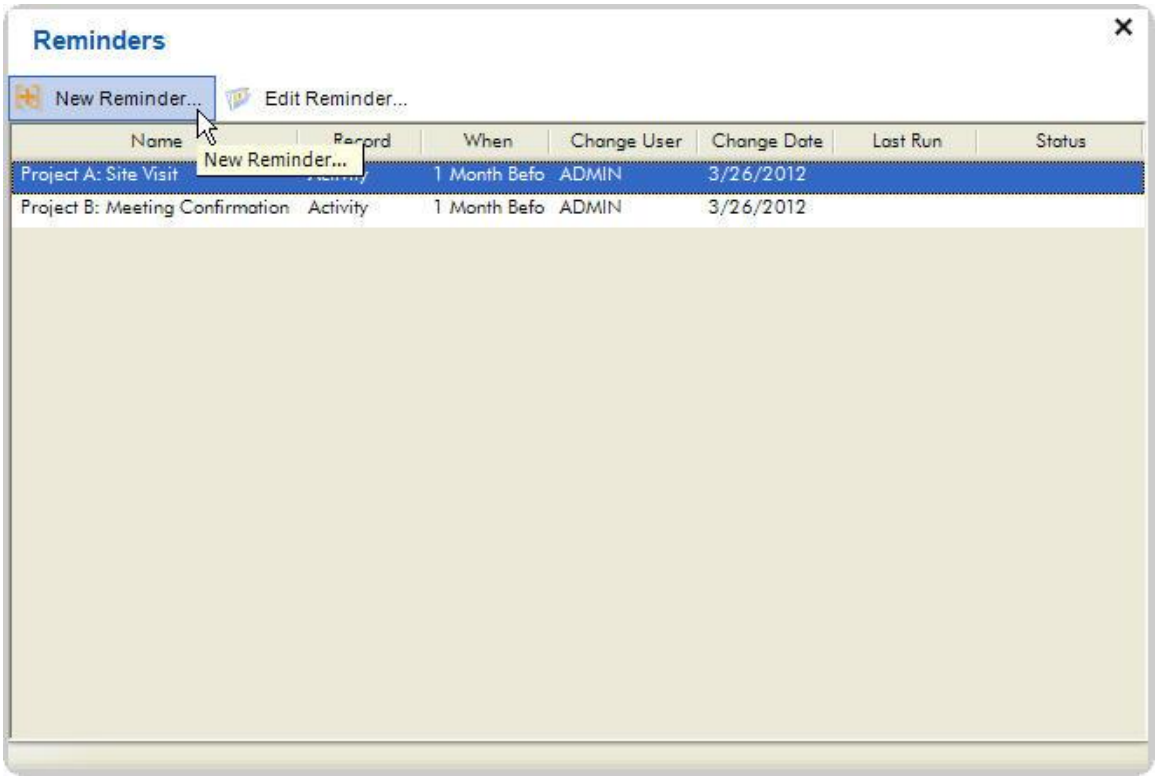
Creating reminders does not mean they will be sent; you need to schedule the Reminders Engine to run and send them.

For instructions on sending reminders, please see “Scheduling and Running Reminders”.

Editing Reminders

Reminders are edited using the same form with which they are created. To edit a reminder:

1. In GIFTS Alta, go to **User menu > Reminders**. The reminders Summary form opens. Your existing reminders are displayed.



2. Double-click the reminder you want to edit or select the reminder and click the **Edit Reminder** button on top to open the edit form.
3. The Reminders [Edit] form opens. The Reminder Edit form has the same fields as the New Reminder form. For an explanation of the fields, please see “Creating a Reminder”.
4. Make any changes you want to the reminder and click **OK** at the bottom of the form. Your reminder is edited.

Specifying Email Settings

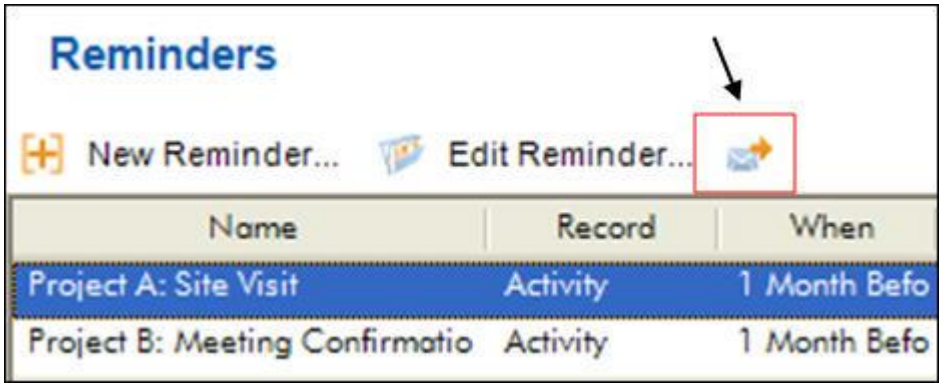
Reminders uses the same email program as GIFTS Alta, but in some cases GIFTS Alta prompts for additional information when sending email. Since Reminders is run on an automated, scheduled basis, any such additional information needs to be stored as a setting.

- If your GIFTS Alta system is set up to use Lotus Notes API, VIM, or SMTP/POP, you need to specify email settings.
- If your GIFTS system is set up to use MAPI, you do not need to specify settings.

NOTE: If you are not sure what your GIFTS email settings are, you can verify them from the GIFTS Administrator Module. Go to Setup ➢Preferences, and look at "E-Mail Program Used" on the External tab.

To specify email settings:

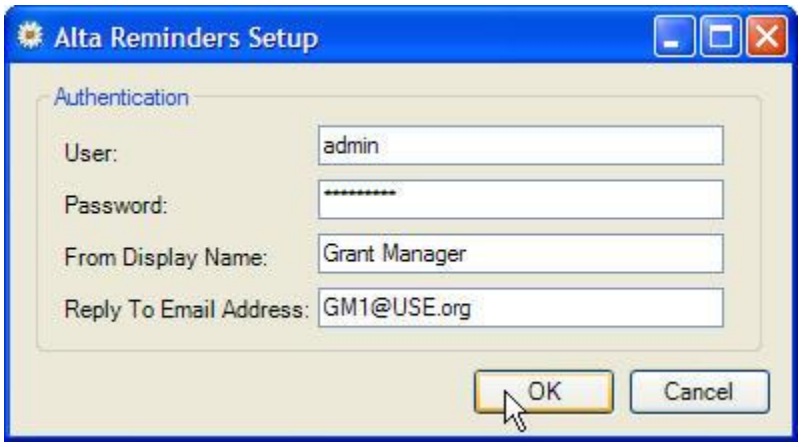
1. From the Summary form of Reminders, click the **Email Settings** icon on top.



Note: If Email Settings is disabled (greyed out) on the Tools menu, your GIFTS Alta system is set up to use MAPI and you do not need to specify settings.

Depending on your email settings, one of the following forms appears.

- Lotus Notes API
- VIM or SMTP/POP



2. Enter a **User name** and **Password**. Note that these should come from your mail system and not GIFTS Alta.
3. For VIM or SMTP/POP, enter a **From** Display Name (the name that will display as the sender of the reminder) and a **Reply To** Email Address (the address which will display as the 'from' address and to which recipients' replies will be sent).

4. Click **OK**. These settings will be used for all messages sent from Reminders until changed.

Scheduling and Running Reminders

The part of Reminders that actually generates and sends the reminders you create is called the Reminders Engine. It can be scheduled to run automatically via a task scheduler or it can be run manually. The following sections describe how to run the Reminders Engine.

Although you can create reminders from any GIFTS Alta workstation, you can only schedule and send reminders from a workstation on which you have installed the Reminders Engine. For information on the installing the Reminders Engine, please see chapter 11 of the *GIFTS Alta Installation Guide*.

If you are not sure whether the Reminders Engine has been installed on your workstation, you can verify that through your Control Panel.

To verify that the Reminders Engine has been installed:

1. Go to the Start menu and choose **Control Panel > Accessories > Add or Remove Programs**. A list of all the programs installed on your workstation appears.
2. Scroll down the list and look for **MicroEdge Reminders Engine**.

   If you do not see the MicroEdge Reminders Engine, it has not been set up on your workstation and you cannot schedule and run reminders from this machine.

   If you think you should have this capability, please contact the administrator who installed GIFTS Alta.

Scheduling Automated Reminders

The workstation sending reminders does not need to have a user logged in to send reminders, but it must be turned on. Be sure to schedule automated reminders on a machine that will be left on.

IMPORTANT: If you are running Windows 7 or Vista on your workstation, refer to the instructions *Scheduling Reminders on Windows 7 or Vista* section.

To schedule the Reminders Engine to run as an automated task:

1. From the workstation on which you have installed the Reminders Engine , go to the desktop Start menu and choose **All Programs > Accessories > System Tools > Scheduled Tasks**. The Scheduled Tasks window opens.
2. Double-click **Add Scheduled Task**. The Scheduled Task Wizard opens.
3. Click **Next**. You are prompted to select the program you want to run.
4. Click **Browse** and select the **AltaReminders.exe** file located in your **GIFTS\Alta Extensions** directory and click **Open** to continue.
5. Modify the task name if desired and select a frequency under **Perform this task** (daily, weekly, monthly, etc.).
6. Click **Next** to continue.

7. Depending on your frequency selection above, further choices may be required such as Start time and Day of the week.
8. Click **Next** to continue.
9. You are prompted to enter the login information for the Windows user account that will be used to run the Reminders Engine. Enter the login and password for your Windows user account. Remember that to schedule the Reminders Engine, you must have permission for Reminders.
10. Click **Next**. The Wizard displays the options you selected.
11. Select the "**Open advanced properties for this task when I click Finish**" option.
12. Click **Finish**. The task properties are displayed.

    Note: If Windows displays an "access denied" message, the user ID you entered does not have permission to use Reminders Plus, or the password you entered was not correct.

13. In the **Run** field, at the end of the **Run** path to AltaReminders.exe, type a blank space and then type "**-generate**" (do not type a blank space after "- generate"). This parameter indicates that the Reminders Engine should run, generating and sending reminders.
14. Click **OK** to save your changes. If you are prompted to re-enter your Windows login information, re-enter it and click **OK**.

Scheduling Automated Reminders on Windows 7 or Vista

To schedule the Reminders Engine to run as an automated task from a workstation running Windows 7 or Vista:

1. From the Windows Start menu, choose **All Programs > Accessories > System Tools > Task Scheduler**. The Task Scheduler Window appears.
2. Click **Create Basic Task** from the Actions section. The Create Basic Task Wizard appears.
3. Enter the **Name** and **Description** for the batch, and then click **Next**.
4. Select when you want the batch to run, either once or on a reoccurring basis, and then click **Next**.
5. Enter a starting date and time, and the frequency, if needed. Then click **Next**.

6. Select Start a program, and then click **Next.**
7. Click **Browse** and select the AltaReminders.exe file located in your GIFTS\Alta Extensions directory.
8. Click **Open**.
9. In the Add arguments field, enter "**-generate"**. This instructs the scheduler to run the batch in silent mode.
10. In the same field after the "-generate", add the name of the batch and the name of the GIFTS user who created the batch in the following format: batch=[batch name] login=[GIFTS user ID].

11. Click **Next**.
12. To configure advanced settings, select the Open the Properties dialog for this task when I click Finish checkbox.

Note: This step is optional and launches the Properties window after you click Finish which allows you to enter advanced settings.

13. Click **Finish**. The Reminders Plus Engine and Window Scheduled Tasks are now set up to run at the time you specified, without any further user intervention. When the Reminders Engine runs, any reminders scheduled for that day are sent out and—for any reminders that were set up to create an Activity—an Activity is created in GIFTS Alta.

Running Reminders Manually

The Reminders Engine can also be run manually at any time from a workstation on which the Reminders Plus Engine Setup has been run.

The Reminders Engine is run via the AltaReminders.exe located in your GIFTS\Alta Extensions directory. However, because this executable also runs Reminders, if you double-click the AltaReminders.exe, it will open the feature, exactly as if you had selected it from your GIFTS Alta User menu. In order to tell the AltaReminders.exe to run the Reminders Engine to generate and send reminders, you need add certain parameters to the command. This is done by creating and modifying a shortcut to the AltaReminders.exe.

To create a shortcut to run the Reminders Engine:

1. Locate AltaReminders.exe in your GIFTS\Alta Extensions directory.
2. Right-click on AltaReminders.exe and select **Create Shortcut**. A shortcut is created in the same folder. You can move this shortcut, for example to your desktop, after creating it.
3. Right-click on the shortcut and select **Rename**. Rename your shortcut Reminders Engine, or something else you will remember easily. You do not need to include .exe in the name.
4. Right-click on the shortcut and select **Properties**. The Properties window appears.
5. In the **Target** field, at the end of the path to AltaReminders.exe, type a blank space and then type "**-generate**" (do not type a blank space after "- generate"). This parameter indicates that the Reminders Plus Engine should run, generating and sending reminders.
6. Click **Apply**.

Your shortcut is now set up to run the Reminders Engine. You can double-click this shortcut to generate and send reminders manually at any time.

Disabling Reminders

Individual Alta Reminders can be disabled at any time via the User Menu in GIFTS Alta.

To disable a reminder:

1. Go to **User Menu > Reminders**.

2. Select the **Reminder > Edit Reminder...**

3. Uncheck the "**Enabled**" check box.

4. Click **OK**. The selected reminder is now disabled and reminder emails will not be sent unless it is enabled again.

Viewing the Error Log File

If Reminders Plus encounters any errors when it runs (either scheduled or manually), it generates an error log file where you can view information about the error/s that occurred. Error logs are text files, created on a daily basis (when errors occur) and named in the following format: Reminder MM-DD-YYYY. If more than one reminder encounters errors in a day, all the error messages for that day are included in a single log file.

You can quickly see if a reminder had any errors by looking at the **Status**column of the Summary form.

If a reminder's status is Error, an error log file has been created. Note that if no errors occur, a log file is not created.

NOTE: A status of Error does not necessarily mean that your reminder has not been sent. It can indicate a partial error, for example, that one of three recipients was missing an email address. The log file contains these details.

To view the error log file:

1. From the Summary form of Reminders, click the **View Error Log** icon on top. The directory where your error logs are written opens in a separate window. The default location is the Logs\Reminders folder in your GIFTS directory.
2. Select the log file you want and double-click to open it and view error details.
3. When you are finished reviewing errors, you can close the log file and log file directory windows.

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