GIFTS Alta® Blueprint

User's Guide

R09262014

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Part number: GIFTS_Alta_Module_Blueprint_UG

Publication date: September 2014

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Welcome to GIFTS Alta Blueprint

GIFTS Alta Blueprint is an optional module which provides a suite of tools for customizing the fields and forms used in GIFTS Alta.

IMPORTANT: Once Blueprint is installed, the classic Customizer options will no longer be available in the Administrator's module. Also, if a user uses the GIFTS.exe file to launch the GIFTS 6.x interface, any custom tabs will no longer be visible.

NOTE: GIFTS Alta 1.5 or later is required for compatibility.

These tools include:

- The Custom Fields Manager
- The Fields Library
- The Forms Library
- The Workflow Library
- The Taskboard
- The GCS Layouts Manager

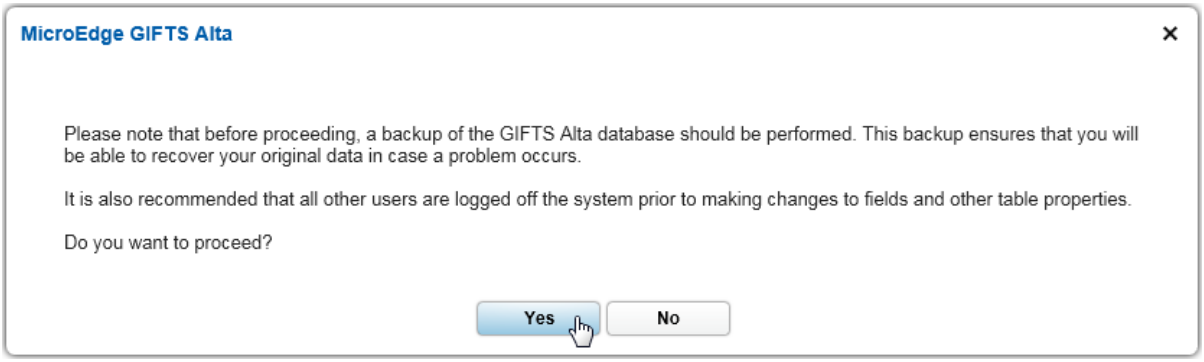
The Custom Fields Manager

The Custom Fields Manager is the tool used to create and modify custom fields, custom calculated fields, and URL links.

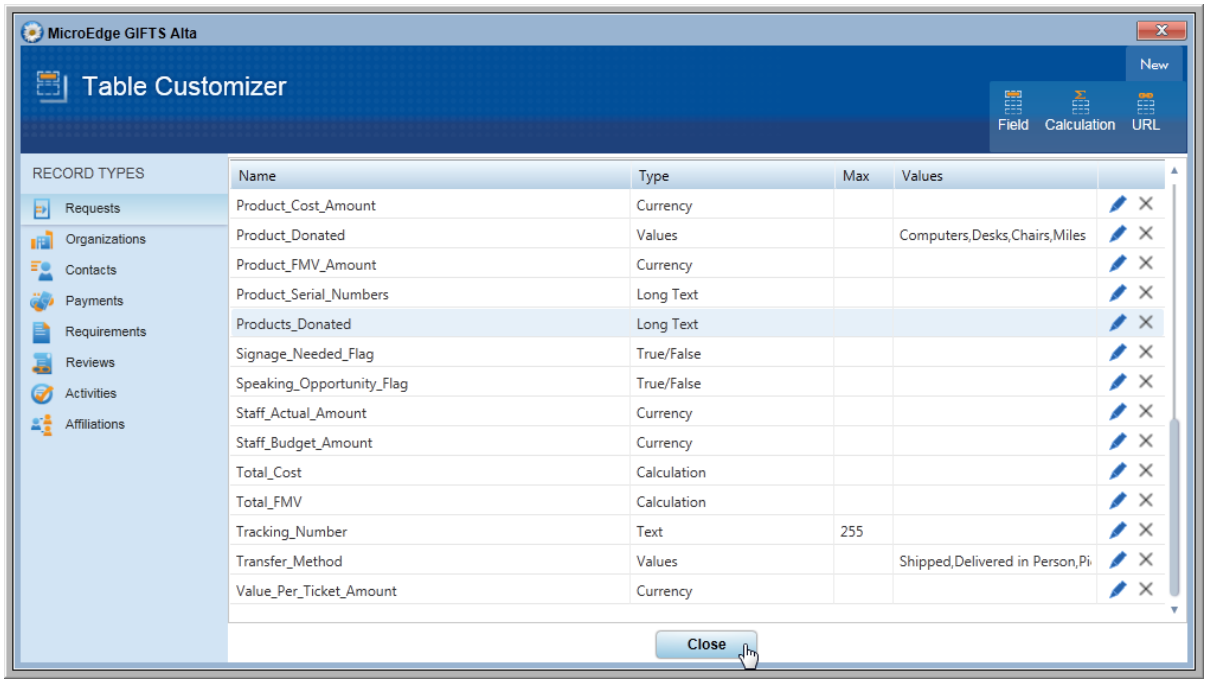
CAUTION: Before making changes, it is highly recommended to (1) backup your database and (2) make sure all users are logged out of the system while making changes.

This tool can be launched from the **Modules > Blueprint** > **Custom Fields** from the ribbon menu.

When you click on the Custom Fields option, the following warning will be displayed:



After clicking **Yes** the Custom Fields Manager will open.

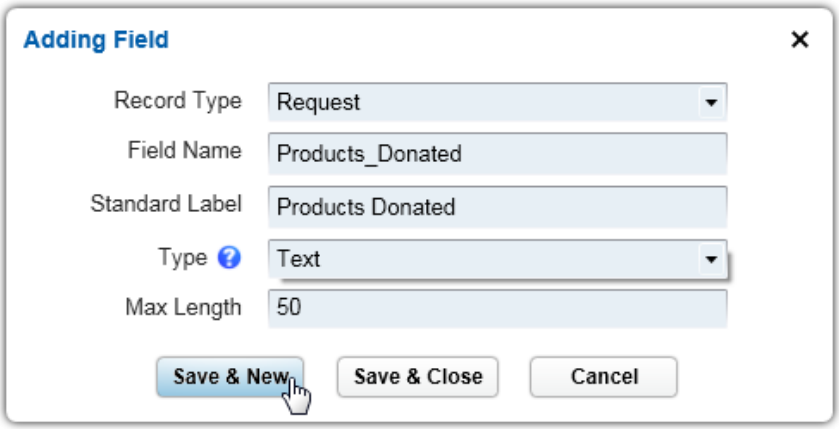


The left panel lists all the Record Types you may choose from. Simply click on a record type to see a list of existing custom fields on the main area to the right.

NOTE: Requests will be the default record type. Once you work on another record type, your selection will be remembered for subsequent visits.

Adding a Field

To add a new field, go to **New > Field** on the upper right menu to open the Adding Field form.



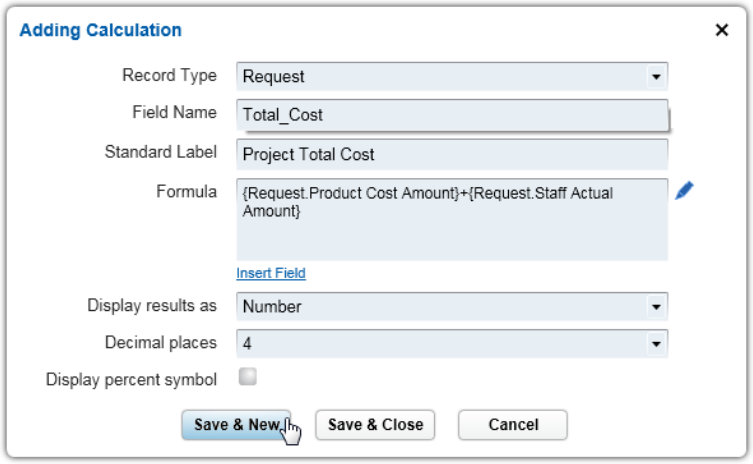
The table below describes the fields and options available:

Field	Notes
Record Type	This field defaults to the record type currently selected in the Custom Fields Manager, however, it may be changed, if needed. **NOTE:** It will be read-only when editing an existing custom field.

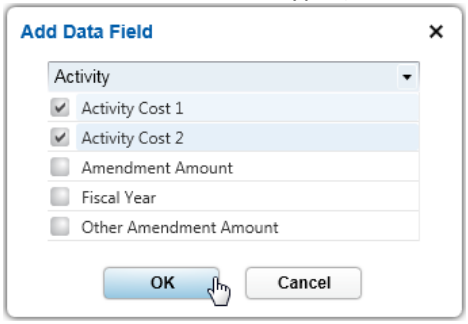
Field Name	This is the name of the field. Any spaces will be replaced by an underscore. Maximum number of characters is 63. [required]
Standard Label	This is the label that will be displayed next to the field. Spaces are allowed. Maximum number of characters is 63. [required]
Type	This dropdown lists the types of fields which can be added. Defaults to Text. Options are: • Text • Long Text • Small Number, No Decimal • Medium Number, No Decimal • Large Number, No Decimal • Currency • Number, with Decimal • Date • Values • True/False A question mark icon if available for each Type. Hovering over the **?** with your mouse cursor will display instructional text which describing the kind of data each type can save. **NOTE:** True/False type must end with '_Flag' in the field name.
Max Length	This option only appears when Type = Text. It determines the maximum number of characters that can be entered in the custom text field. Valid values are 1 – 255. [required]
Values	This option only appears when the user selects Type = Values. Each valid value must be entered separated by a comma.
Save and New / Save and Close	Each button updates the database with the new field. **Save and New** clears the form, but leaves the Record Type the same. **Save and Close** updates the database, then closes the form.
Cancel	Closes the form without saving the new field.

Adding a Calculation Field

To add a new field, go to **New > Calculation** on the upper right menu to open the New Calculation form.

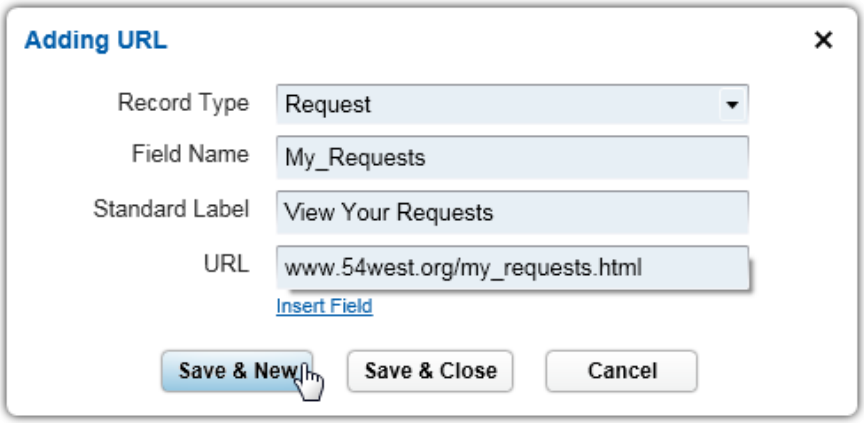


The table below describes the fields and options available:

Field	Notes
Record Type	This field defaults to the record type currently selected in the Custom Fields Manager, however, it may be changed, if needed. **NOTE:** It will be read-only when editing an existing custom field.
Field Name	This is the name of the field. Any spaces will be replaced by an underscore. Maximum number of characters is 63. [required]
Standard Label	This is the label that will be displayed next to the field. Spaces are allowed. Maximum number of characters is 63. [required]
Formula	Enter the formula for the field here. Basic arithmetic (addition, subtraction, division and multiplication) functions as well as SUM and AVERAGE are allowed. Format for SUM and AVERAGE functions will be: SUM (Field 1, Field 2, Field 3) Or AVERAGE (Field 1, Field 2, Field 3)
Insert Field	This link opens a form with a Record Types menu at the top and all calculable fields from that record type (standard and custom).  **NOTE:** The record types available will depend on the custom field's record type.
Display results as	Select how the calculation result should be displayed. (Currency or Number)
Decimal places	(Only shows when showing result as a Number.) Indicates the number of decimal places to display. Options are: 0 – 4.
Display percent symbol	(Only shows when showing results as a Number.) Indicates whether or not the field should be shown preceded by % sign.
Save and New **Save and Close**	Each button updates the database with the new field. **Save and New** clears the form, but leaves the Record Type the same. **Save and Close** updates the database, then closes the form.
Cancel	Closes the form without saving the new field.

Adding a URL Link

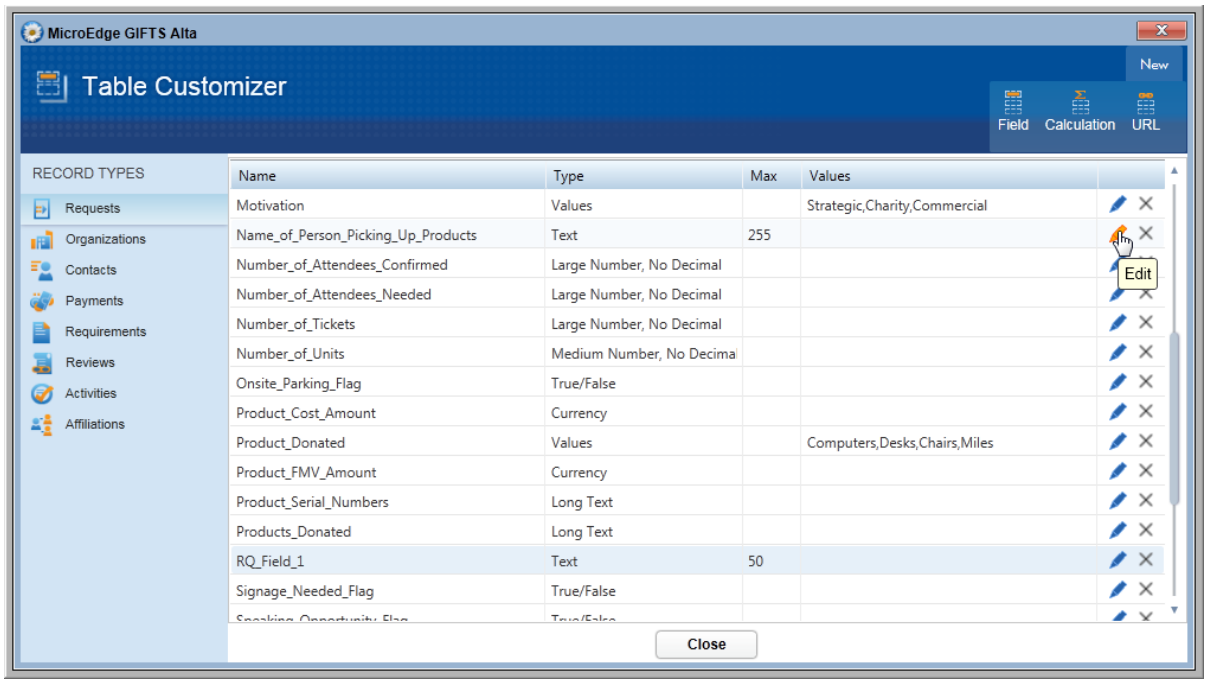
To add a new field, go to **New > URL** on the upper right menu to open the Adding URL (New) form.



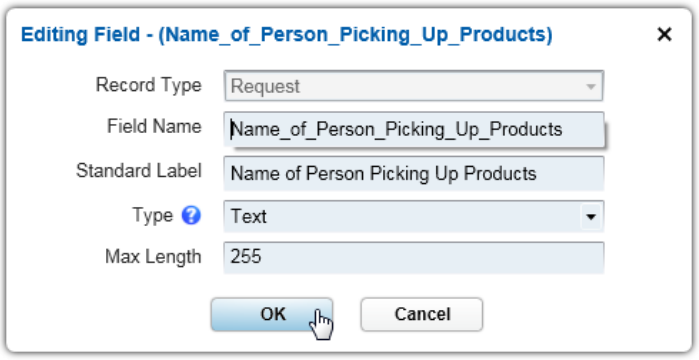
Field	Notes
Record Type	This field defaults to the record type currently selected in the Custom Fields Manager, however, it may be changed, if needed. **NOTE:** It will be read-only when editing an existing custom field.
Field Name	This is the name of the field. Any spaces will be replaced by an underscore. Maximum number of characters is 63. [required]
Standard Label	This is the label that will be displayed next to the field. Spaces are allowed. Maximum number of characters is 63. [required]
URL	Enter the URL address for the link.
Insert Field	This link opens a form with a related record types menu at the top and all standard and custom fields from that record type. **NOTE:** The record types available will depend on the custom field's record type.
Save and New **Save and Close**	Each button updates the database with the new field. **Save and New** clears the form, but leaves the Record Type the same. **Save and Close** updates the database, then closes the form.
Cancel	Closes the form without saving the new field.

Editing and Deleting a Custom Field, Calculation, or URL

All custom fields, calculations, or URLs are listed with an **Edit** pencil icon and **Delete** icon in the right side of the grid.



If clicked, the pencil opens the Editing Field form:



Notice the field name is displayed in parenthesis on top and only **OK** and **Cancel** buttons are available.

CAUTION: Changing the data type of a field may cause loss of data if the data types are incompatible.

NOTE: True/False type fields must end with '_Flag' in the field name. If you change from a different type to True/False, a message will state that '_Flag' will be added to the field name.

Change Validation

If the field is in use by existing calculated fields/reports/searches/views/IGAM forms, and the change to the field would result in issues where it is used, an error report will be displayed with one or more of the following sections:

> This field is currently in use by one or more calculated custom fields. Note that this change may cause the calculations to be incorrect and may result in error. Here are the calculated field(s) using this field:
>
> Table Calculated Field Name
>
> This field is currently in use by one or more reports. Note that this change may cause fields in the report to be incorrect and may result in error, Here are the report(s) using this field:
>
> Report Category Report Name
>
> This field is currently in use by one or more saved views. Note that this change may cause fields in the view to be incorrect and may result in error, Here are the view(s) using this field:
>
> View Category View Name
>
> This field is currently in use by one or more saved searches. Note that this change may cause fields in the search to be incorrect and may result in error, Here are the search(es) using this field:
>
> Search Category Search Name
>
> This field is currently in use by one or more IGAM Forms. Note that this change may cause fields in the IGAM Form to be incorrect and may result in error, Here are the IGAM Form(s) using this field:
>
> Form ID Form Name Form Page
>
> **Are you sure you want to change the current field? YES / NO**

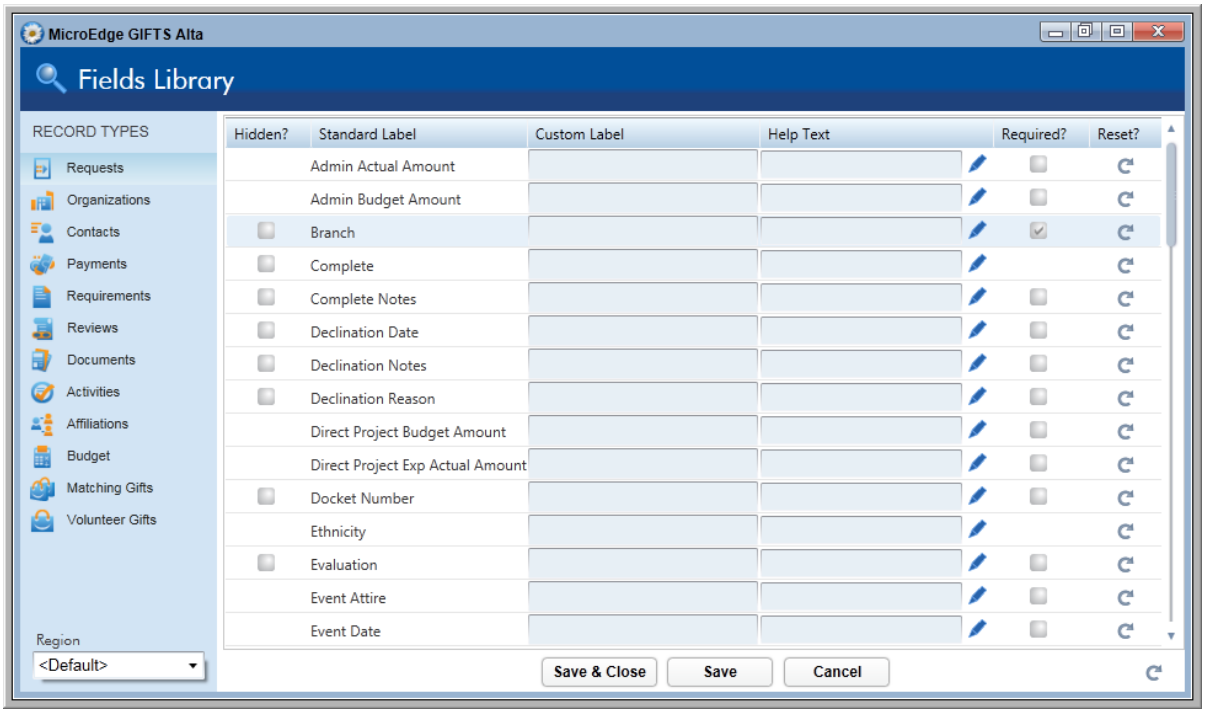
Status Bar and Process Monitor

A status bar will be displayed during processing of custom field and calculation changes. If any errors occur, they will be displayed in a Process Monitor window.

The Fields Library

The Fields Library allows you to access a list of all fields currently available in the system for all record types in order to manage custom labels, help text, and make certain fields hidden or required.

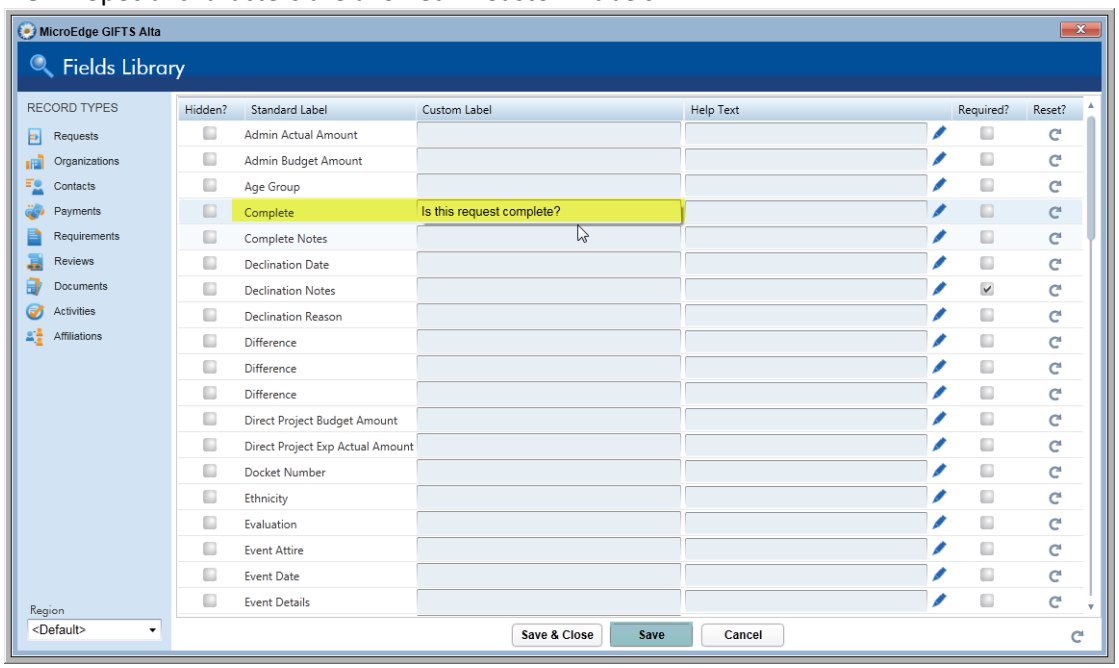
This tool can be opened from the **Modules > Blueprint > Fields** ribbon menu.



Selecting the Labels to Personalize

In order to personalize field labels to match your organization's terminology, do the following:

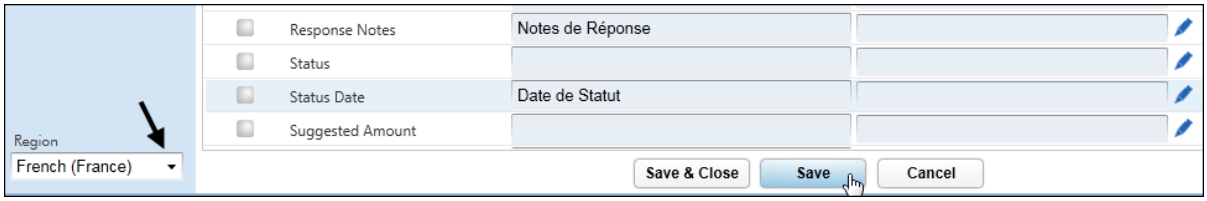
1. Select the **Record Type** on the left panel for the field you wish to customize.
2. Optionally, the **Region** menu can be used now to set this session's changes for a specific region of the world.
3. Scroll down the list until you find the standard label for the field.
4. Enter your desired custom label in the **Custom Label** entry field.
   NOTE: Special characters are allowed in Custom Labels.



5. Click the **Save** button.
6. Repeat this process as necessary for other fields.

Configuring Different Region Sets

The **Region** menu in the lower left panel allows you to configure custom labels and settings for users who have their Windows Operating System set to a specific region.



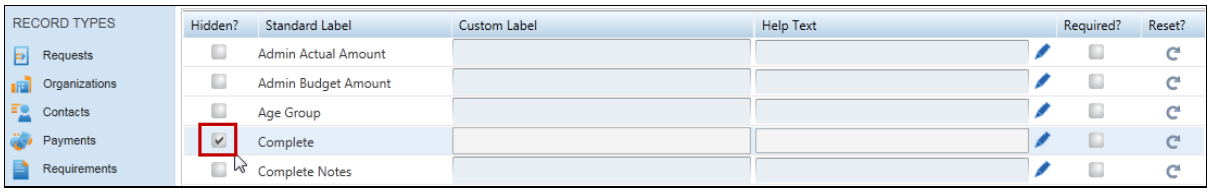
All regions currently available in the Windows Region settings will be available on this menu.

- When first accessed, <Default> will be the selected Region.
- On subsequent visits, the system will remember the last Region used.

Example: This can allow GIFTS users of the same organization in the United States, Spain, France, and the UK to see four different sets of custom labels for various fields.

Hiding a Field in GIFTS Alta

You can hide some fields in the system using the **Hidden** checkbox to the left of the standard field label.



Simply check the Hidden checkbox and click **Save**.

NOTES:

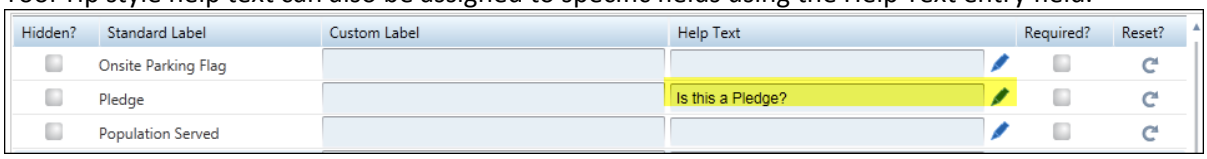
- If the field is currently flagged as Hidden, the Custom Label entry field will be disabled.
- If the field is made **Hidden** in the future, all other settings for that field will be reset.

The following field types cannot be made hidden and will have a disabled checkbox:

- **System Required**
- **Coding Sheet Codes**

Adding Tool Tip Style Help Text

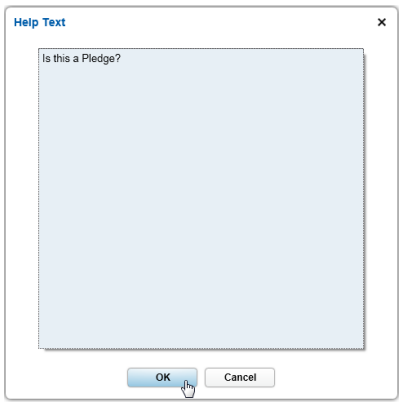
Tool Tip style help text can also be assigned to specific fields using the Help Text entry field.



This will display a blue icon next to the field when used in a form.

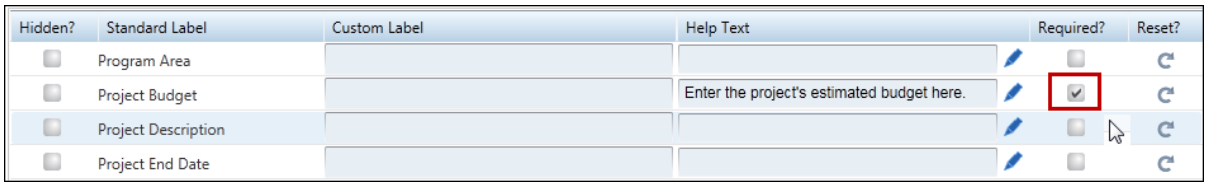
Placing the mouse cursor over this icon will display the Help Text.

The Help Text entry field allows for short help information. For a larger area to type in, click the Edit icon to open an entry form popup.



Making Specific Fields Required

To make specific fields required, check the **Required** box to the right of the **Standard Field Label.**

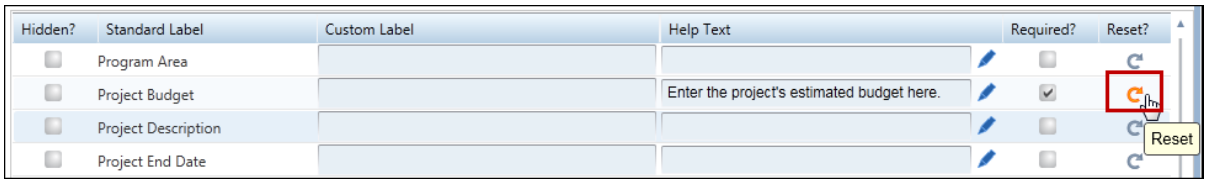


The following field types cannot be made required:

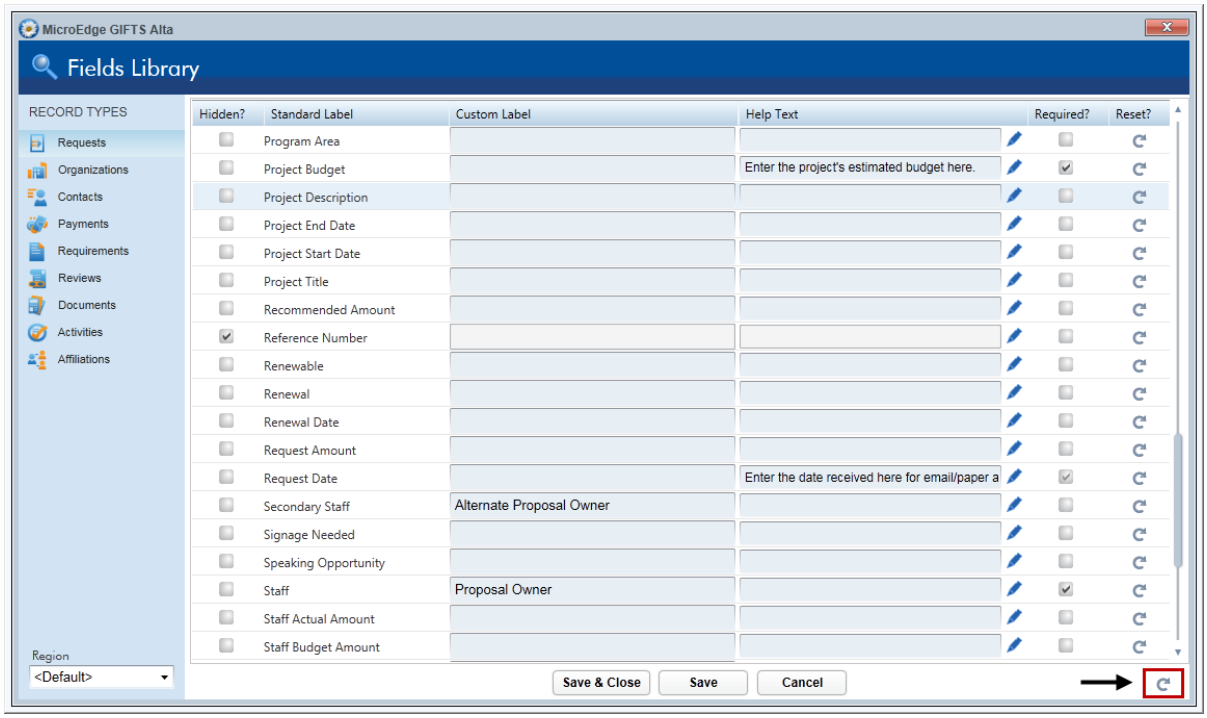
- **System Required** – these fields will be checked but disabled.
- **Boolean** (True/False)
- **Web Clippings**
- **Calculated Custom Fields**
- **Coding Sheet Codes** - Coding Sheet codes can be made required through the Administrator Module's **Setup > Preferences > General Preferences > Coding** tab.

Resetting One or All Fields

Don't like the changes you made to a field? Simply click the **Reset** icon to return to the last saved state.

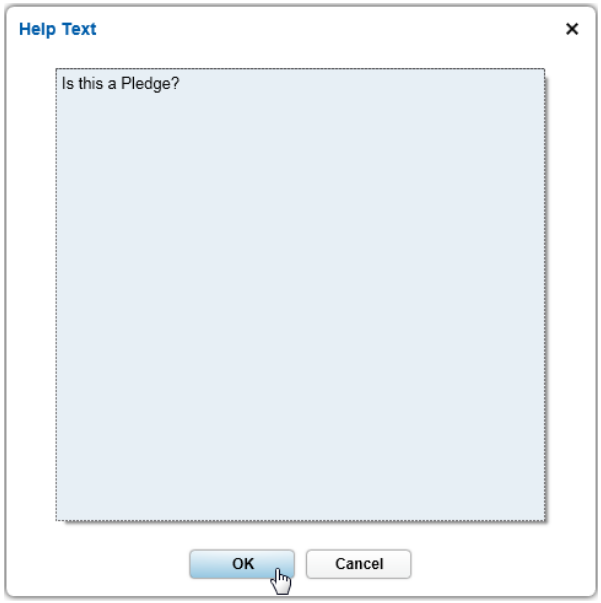


To reset all fields back to the last saved state, click the **Reset All** icon in the lower right corner.



Below is a table describing all the functions in detail:

Function	Displayed as..	Description
RECORD TYPES	This area on the left lists all record types available.	Allows you to select the record type fields to view. • When first accessed, Requests will be the selected Record Type. • On subsequent visits, the system will remember the last record type used.
Region	Dropdown menu below the Record Type list.	This option allows you to specify custom settings for users who have their Windows Operating System set to a specific region. All regions currently available in the Windows Region settings will be available on this menu. • When first accessed, <Default> will be the selected Region. • On subsequent visits, the system will remember the last Region used. **Example:** This can allow GIFTS users of the same organization in the United States, Spain, France, and the UK to see four different sets of custom labels for various fields.
Hidden?	Checkbox	This checkbox will allow you to hide certain fields. The following field types cannot be made hidden and will have a disabled checkbox: • **System Required** • **Coding Sheet Codes**
Standard Label	View Only Text	This column displays the **Standard Label** value for each field.
Custom Label	Text field (255 chars max)	This column displays any custom label assigned to the field.
Help Text	Text field (255 chars max)	This column displays any Help Text assigned to the field. If Help text exists, there will be a blue icon to the right of the field on the edit form. Placing the mouse cursor over this icon will display the Help Text.

Edit	Pencil icon to the right of the Help Text field	Clicking the icon opens the Help Text popup form giving you a larger view of the text and work area for editing. 
Required?	Checkbox	This checkbox allows you to make certain fields required. The following field types cannot be made required: • **System Required** – these fields will be checked but disabled. • **Boolean** (True/False) • **Web Clippings** • **Calculated Custom Fields** • **Coding Sheet Codes**
Reset	Circular arrow icon	This option will set the **Hidden?, Custom Label, Help Text,** and **Required?** fields to the last saved state for the specific field only.
Reset All	Circular arrow icon in the lower right corner of the form	This option will set the **Hidden?, Custom Label, Help Text,** and **Required?** fields to the last saved state for All the fields on the current Record Type list of fields.
Save & Close	Button on bottom of form	Clicking this button will save all changes made and close the Fields Library form.

Save	Button on bottom of form	Clicking this button will save all changes made but leave the Field Library form open.
Cancel	Button on bottom of form	Clicking Cancel will display the following message: Save changes to fields? YES / NO / Cancel

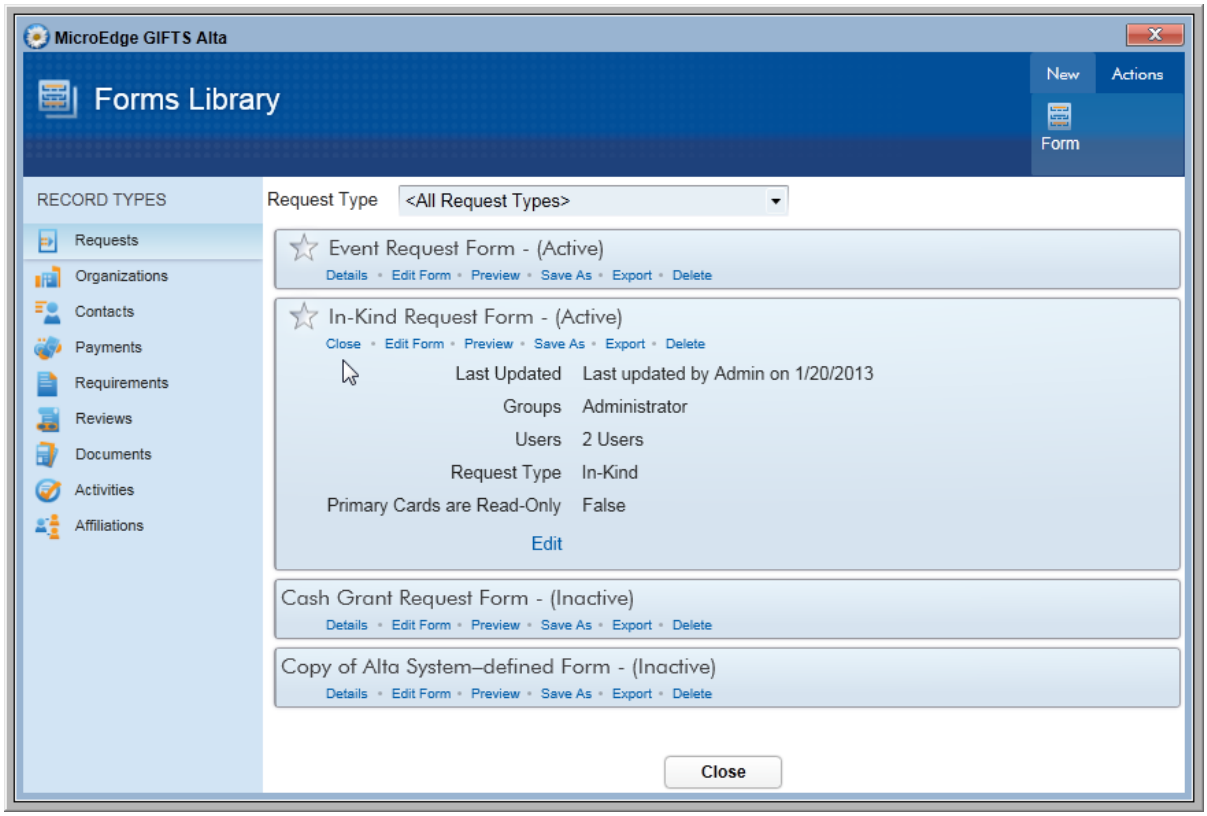
The Forms Library

The Forms Library is where you will create new forms or modify existing forms.

Custom forms can then be employed for different users or groups, allowing the data entry/processing experience to be customized to their needs.

Eventually, these customized forms will also be available to include into 'Workflows' allowing them to be strung together into discrete processes.

This tool will be launched from the **Modules > Blueprint** ribbon menu item. After selecting **Blueprint**, select **Forms** from the dropdown menu displayed to open the Forms Library.



Record Type Filters:

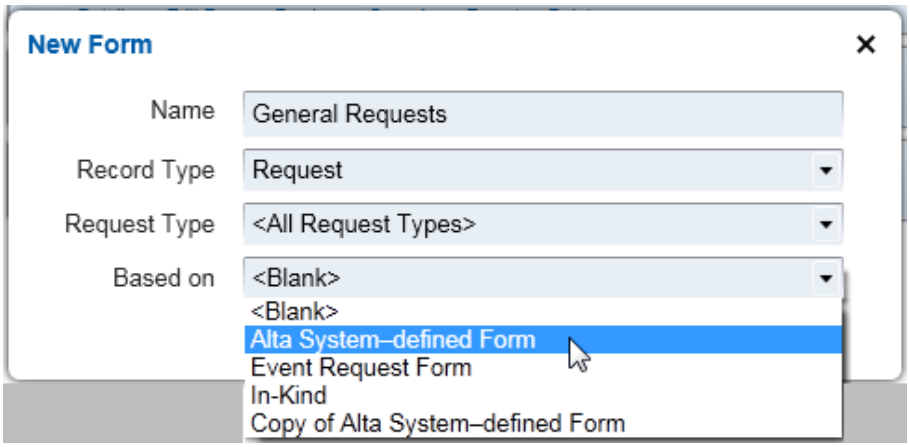
- When Record Type is set to **Requests**, a **Request Type** filter menu will be available above the main list of forms.

Ribbon Menu Options

There are two menu options available in the upper right:

New > Form

Will open the new form selection popup asking for a **Name, Record Type**, and a form to base the initial design on.



Alta System-defined forms are available as an option when creating a new form to use as a base.

NOTE: Modifications to system forms must be saved to a new form name.

Your other options are to start with a Blank form or another existing custom form as a base.

Action > Import

Opens the Import XML Form interface similar to a Browse window for you to select an XML file to import into Alta.

NOTE: This is mainly a tool for troubleshooting issues with forms. You will be able to **Export** problem forms from the Forms Library and send them to MicroEdge to review. Fixed forms can then be imported into your Forms Library.

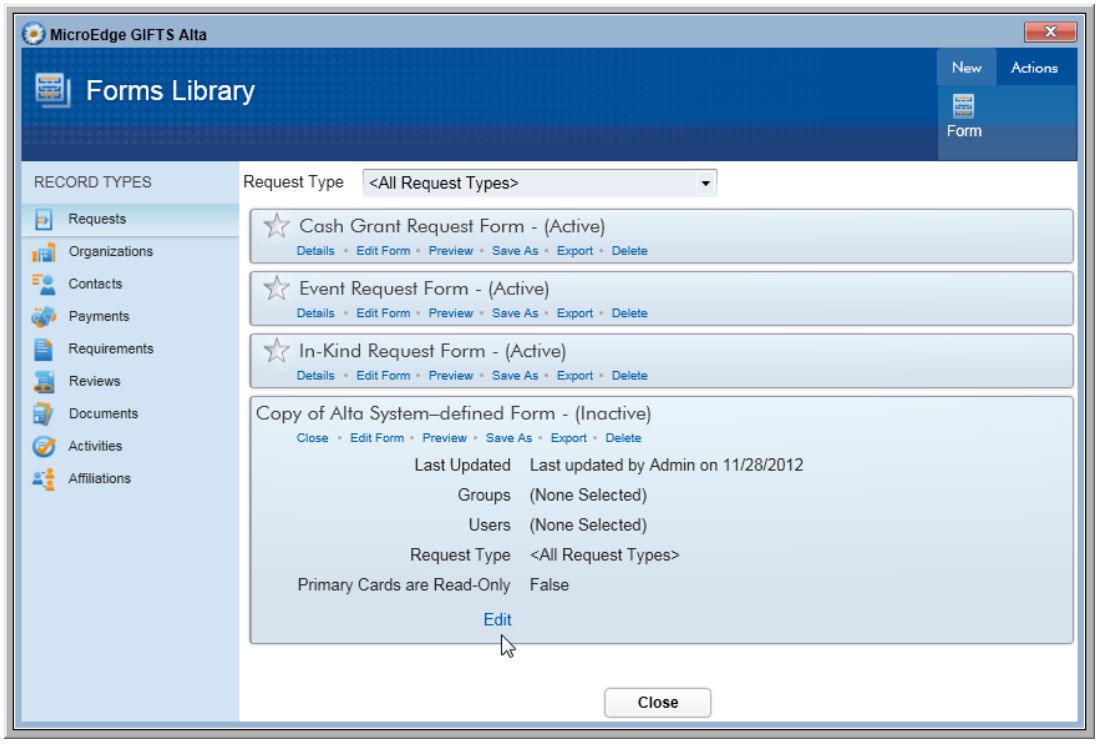
Record Types can be selected on the left panel allowing you to view existing forms which are available for use.

The Forms List

The main area of the Forms Library displays a list of existing forms dependent on the Record Type selected along with linked options under each as described below:

NOTES:

- If **Requests** is selected, a **Request Type** menu is also displayed. The default is to display all types. However, you may choose to limit listed forms to a specific Request Type such as cash grants or in-kind.
- Active forms will have the **Favorite** (star) option on the left. Selecting a form as a favorite will cause it to be displayed at the top of the list in alphabetical order.



Link Name	Description
Details / Close	This expands or collapses the information for each form. **NOTE:** Clicking the **Edit** link in the details area opens a popup which lets you change the Name of the form or the Primary Cards Read Only setting.
Edit Form	This will open the Form Design window for the form.
Preview	Clicking on this will open a preview of the form just as it will look in Alta. **NOTE:** No data will be displayed on the preview form and menu options will be disabled.
Save As	Allows you to save a copy of the existing form to a new name so you can make modifications without changing the original.
Export	Exports the form to an XML file. This is primarily meant as an easy way to send a problem form to MicroEdge Support to review.
Delete	Allows you to delete an existing form.

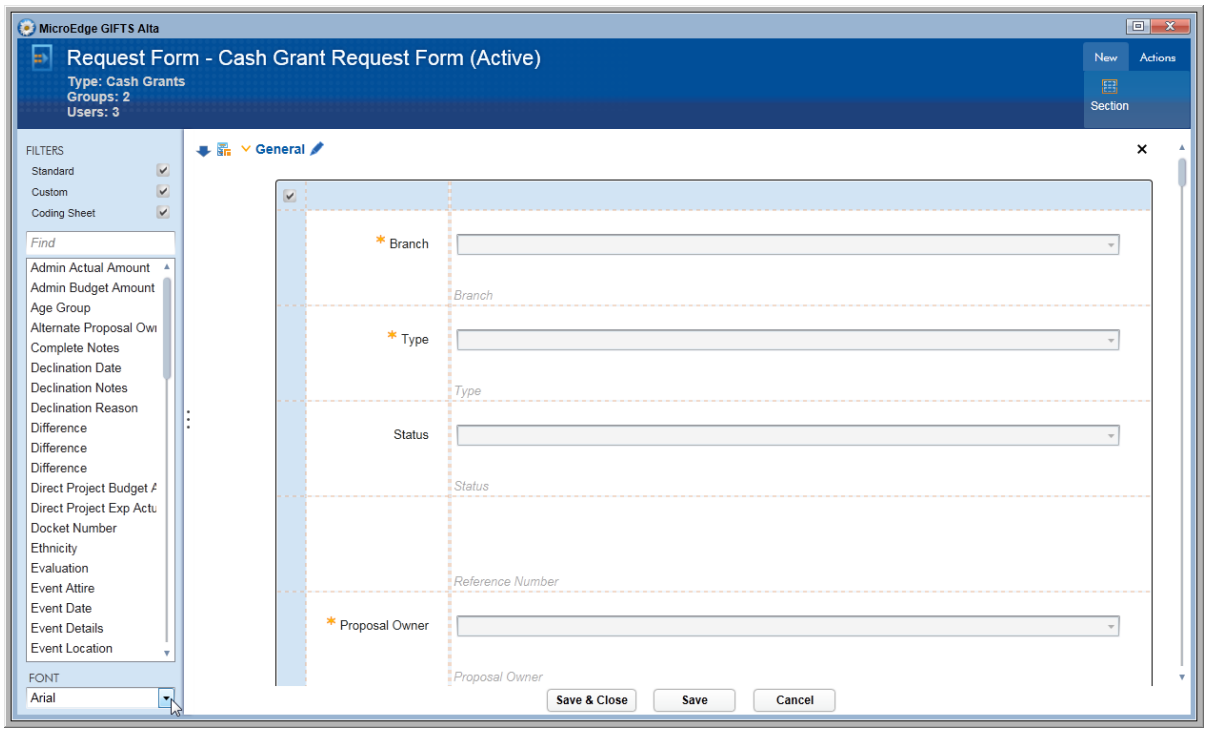
How Do I Modify an Existing Form?

To modify an existing form, do the following:

1. Go to the Blueprint Forms Library. (Blueprint > Forms)
2. Click on the **Record Type** for the form.
3. Locate the form you wish to modify in the main list.
4. Click **Edit Form** to open the form in edit mode.
5. Make the modifications necessary and click **Save and Close**.

The Form Design Window

The form window includes all of the options available for creating or modifying a data entry form.



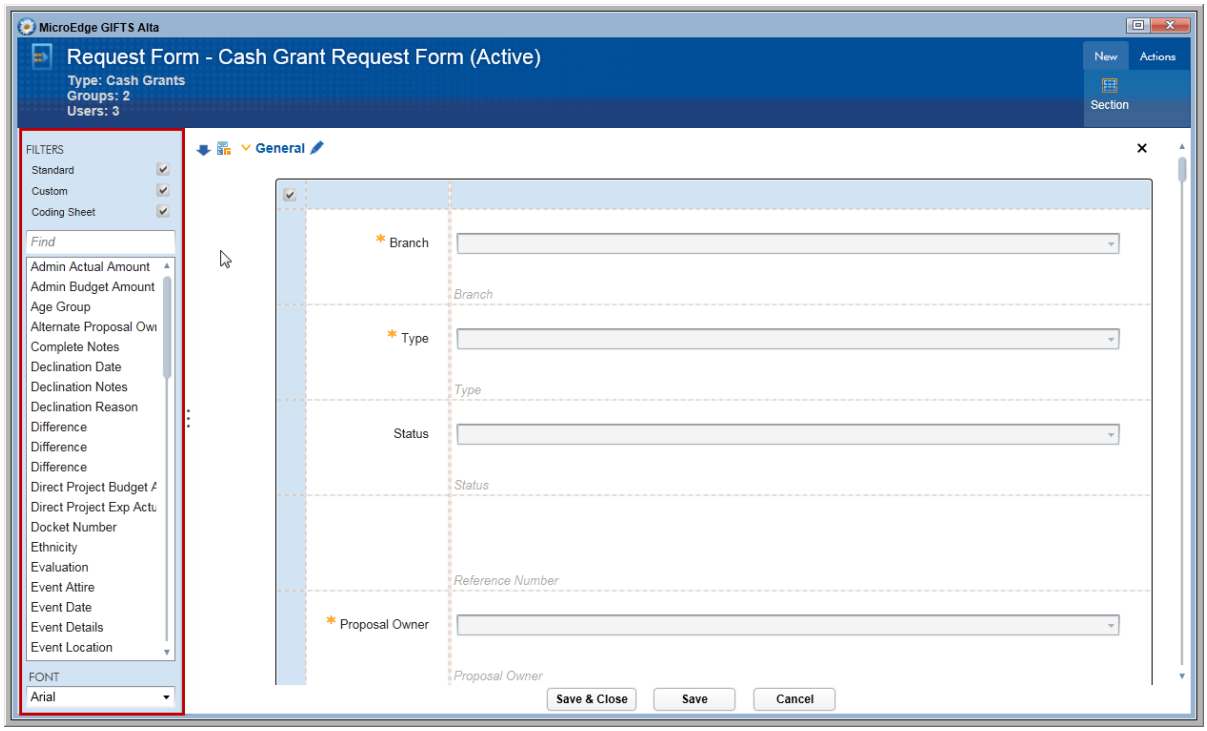
The following options will be available in the upper right ribbon menus:

New Menu	Description
Section	Lets you create a new section in the form by entering **Name, Number of Columns, and Position**. You will also be able to select between a normal **Editable** section or a **Wire Transfer** section.

Actions Menu	Description
Preview	Clicking on this will open a preview of the form just as it will look in Alta. **NOTE:** No data will be displayed on the preview form and menu options will be disabled.
Activate	To make the form usable by other users, you must **Activate** the form.
Deactivate	You can also **Deactivate** a form if you wish to take it off-line.
Assign To	Assign the form to one or more Users or one or more Groups.
Reset	This option restores the form to the last saved settings.
Export	Creates an XML file of the form which can be sent to MicroEdge Support for troubleshooting.
Delete	Deletes the form if the popup confirmation is accepted.

Left Panel Options

The left panel contains options for selecting fields to add to your form.



Option	Description
Filters	Standard, Custom, and Coding Sheet checkboxes allow you to control what fields are displayed in the list. All three are included by default.
Find	This field will allow you to quickly locate a specific field in the list by simply typing in part of the field name and clicking the arrow button or tabbing out.
Fields	This area lists all the fields available for adding to your form based on the filters selected and Find entry (if any). You can simply click and drag a field to the form area from this list.
Font	This will change the font of the text elements in your form for Section instructions, Field instructions, and Field labels.

The Main Form Area

The main form area on the right displays your form in a grid-like manner depending on the number of columns you set.

In this area, you can:

- Add or Remove labels and fields
- Modify existing labels and fields on the form
- Expand or Collapse fields

NOTE: The first column only supports section names or field labels.

NOTE: The **Wire Transfer section** that is available on the Request, Organization, and Payment forms includes special functionality and has to be maintained as an entire block. The field labels and prompts cannot be modified in this section.

Sections

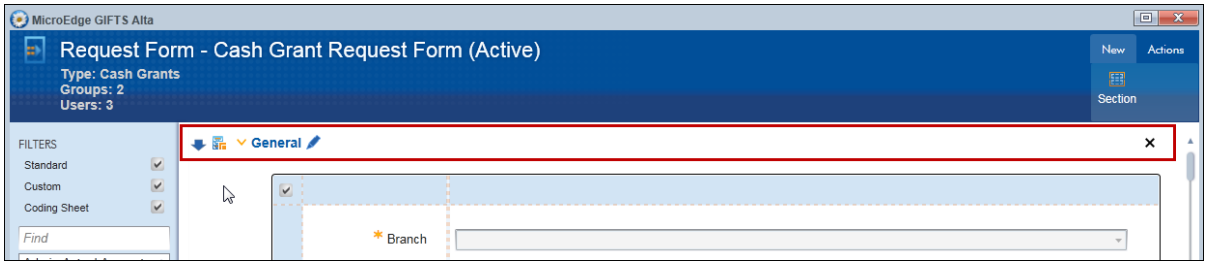
There are several options for working with sections.

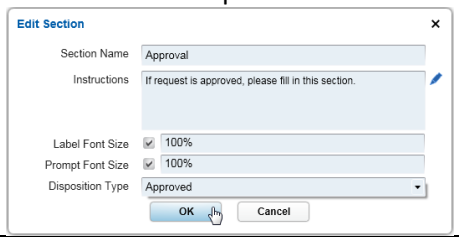
Adding a Section

Use the ribbon menu option **New > Section** to add a new section to your form.

Section Action Icons

Across the top of each section on a form are action icons.



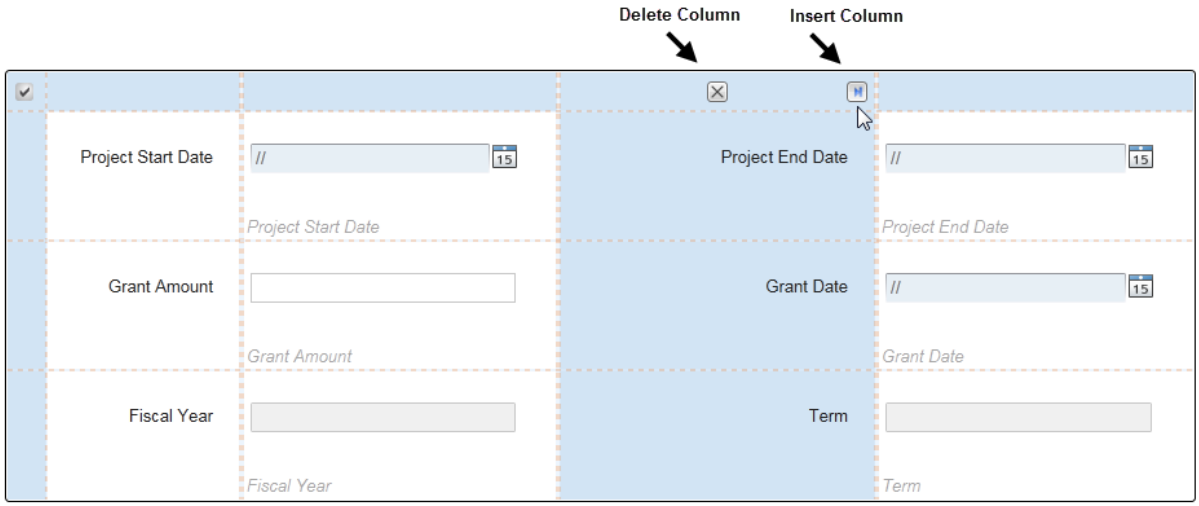
Icon	Name	Description
	Move Section Up/Down	Sections can be re–ordered by clicking the up or down arrows associated with the section. The up arrow is disabled for the first section on the form; likewise, the down arrow is disabled for the last.
	Copy Section	Click this icon to copy the current section. The new copy will be inserted directly below the current section. You can then modify the new section and move it to your desired location on the form.
Approval Approval	Hide or Show the Section	Clicking on the orange arrow or section title will hide or show the current section. Up arrow = section hidden Down arrow = section displayed
	Edit Section	Click this icon to open the section's edit form. 
✕	Delete Section	You can remove a section at any time. All Labels and Prompts are removed along with the section. You will be required to confirm your intentions and will be warned that there is no undo for this action.

Columns

Each section has its own grid. The default number of columns in each section is two.

NOTE: These first two columns cannot be removed.

Additional columns can be Inserted or Deleted using the **Insert Column** or **Delete Column** icons which appear when you move the mouse cursor over the column's header row.



NOTE: The maximum number of columns is 10.

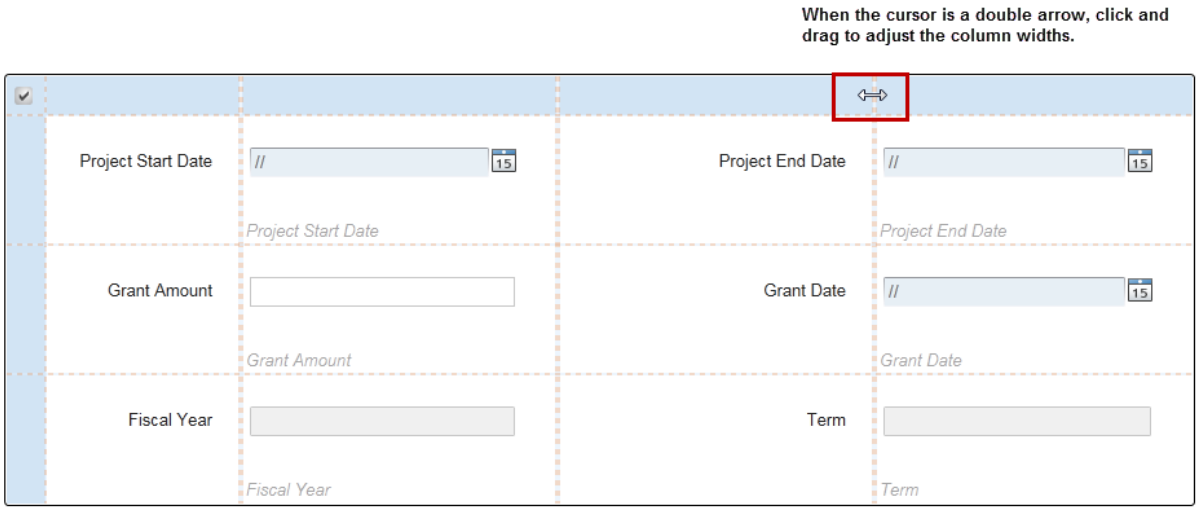
Why Would You Want Additional Columns?

Additional columns are useful when you want to include more than one entry field on the same row.

For example: Project Start and End Dates or City, State, Zip Code

Column Width Adjustments

The **Column Width** can also be adjusted by moving your mouse cursor over the grid line between two columns along the top row. When the cursor turns into a double arrow, click and hold the left mouse button and drag the column side to the desired width.

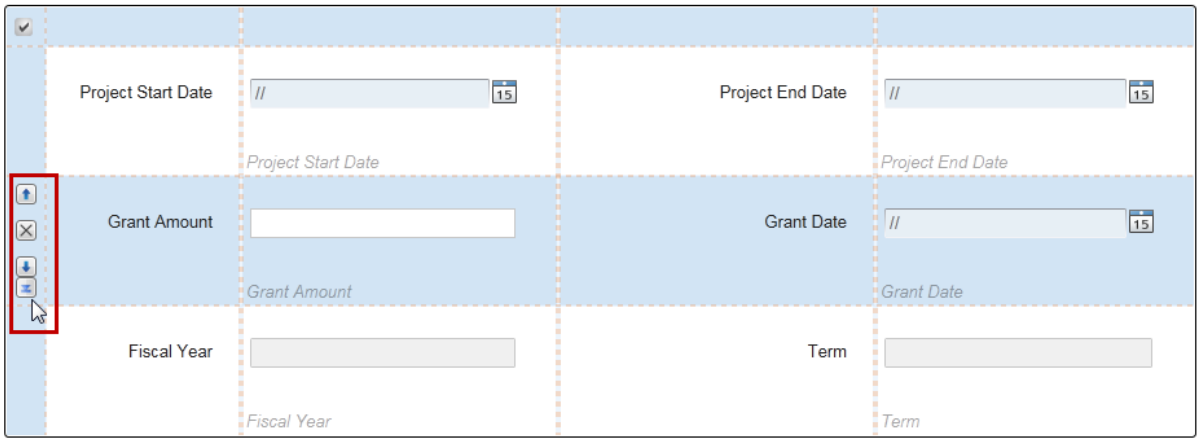


NOTE: The actions of adding and removing columns will change the widths of all the columns and distribute them evenly, so a good tip is to make manually adjusting the column widths the last thing done.

Rows

Rows in a section grid can also be managed in several ways.

NOTE: The icons are only visible when the mouse cursor is placed over actions area to the left of the row.



These options include (from top to bottom):

- Move row up
- Delete row
- Move row down

- Insert row

If you click the **Move row up** arrow for the first row in the grid, the row will be moved to the last row of the previous section. Likewise, if you click the **Move row down** arrow for the last row in the grid, the row will be moved to the first row of the following section.

Clicking **Delete row**, will present a confirmation prompt.

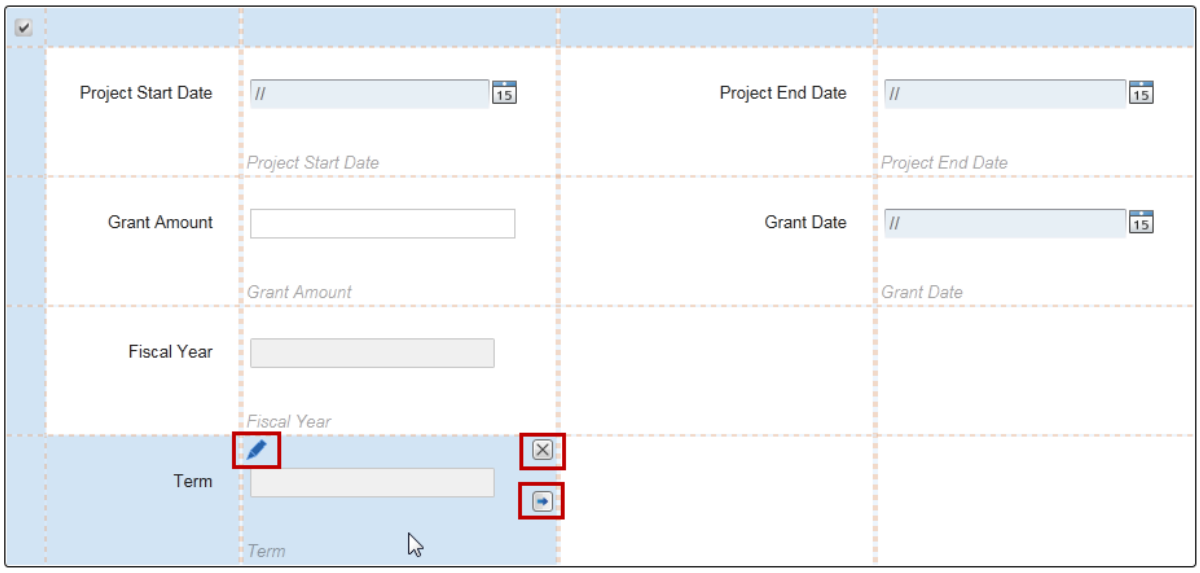
Clicking **Insert row** will add a new row directly below the current row.

Managing Fields in Forms

Fields placed on your forms can also be managed in several ways.

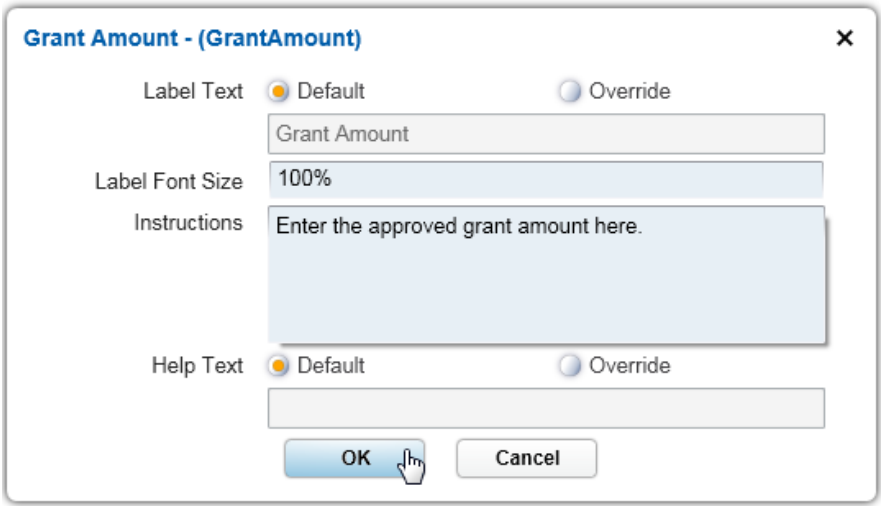
When you place your mouse cursor over a Field Label or Prompt, action icons will appear. These icons can include:

- Edit
- Delete
- Increase span right
- Increase span left
- Decrease span right
- Decrease span left



Editing a Label

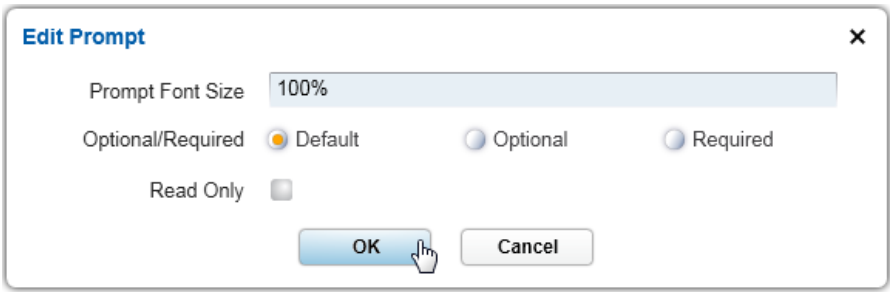
Clicking an **Edit** icon on a field label will open a form similar to the one shown below.



This allows you to override the label text, modify the font size, add instructions, and add help text.

Editing a Prompt

Clicking an **Edit** icon on a field prompt will open a form similar to the one shown below.



On the edit form, you will be able to change the font size and change the prompt to Optional, Required, or Read Only.

NOTE: Some system fields may not have the options above available.

Deleting a Field

To delete a field label or prompt, click on its **Delete** button.

IMPORTANT: There is no confirmation prompt for the deletion.

Moving a Field Label or Prompt

To move a field label or prompt, simply click on it and drag it to an open spot in the form.

NOTE: A field label can be moved or deleted separately. However, if a field prompt is deleted or moved, its associated field label will also be deleted/moved.

Workflow

The Workflow piece of the Blueprint module will provide a beginning–to–end, customized, task–oriented approach to working with the information in the GIFTS Alta database.

The emphasis is on tasks to be done rather than information for viewing or analysis, and is aimed primarily at users with limited functions within the system, such as Program Officers or board members.

When the user has completed the workflow, the system can be configured to automatically update certain values, thereby moving the record smoothly to the next phase in the process.

Users can also be prompted with an action or choice of actions, such as Approve, Decline, or Status Change depending on the record type.

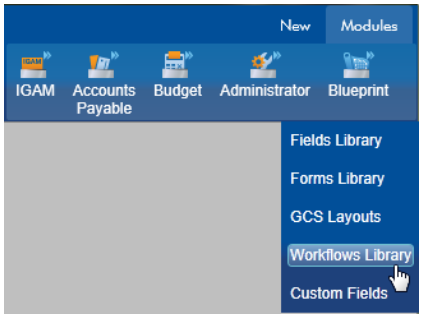
Workflows can also be designed for the purpose of adding new records to the database by allowing almost complete flexibility of design. The process can be configured to string together several forms both for the main record and for any of its primary relationships.

Workflows can be used to update existing records or create new ones.

Creating Workflows

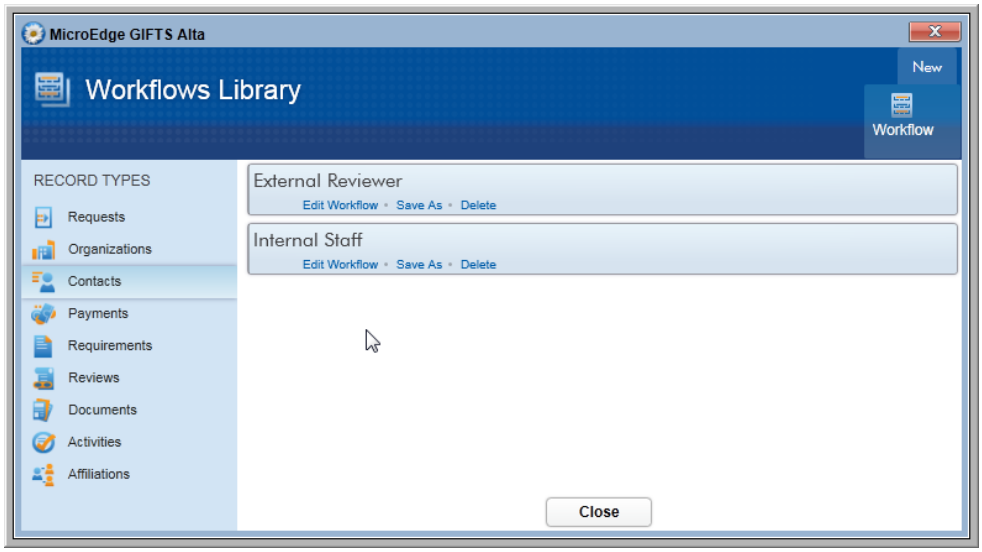
To create Workflows, you must first set up any desired Custom Fields and create Workflow forms in the Forms Library to be used in the various steps.

Once the Workflow forms are ready, you can access the Workflows Library to create a multi-step workflow by clicking the **Blueprint** button in the Modules menu.



The Workflows Library interface will allow the user to do the following:

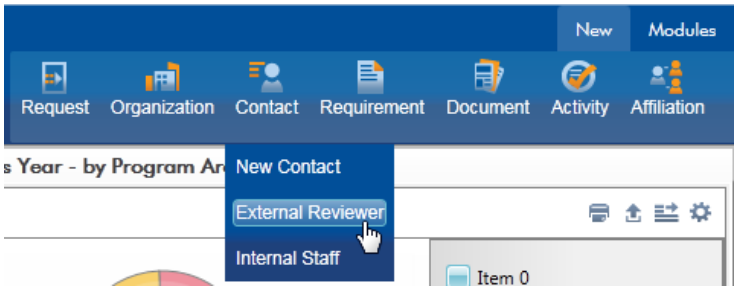
- Create a New Workflow with multiple steps and a completion action
- Edit the parameters of an existing Workflow
- Delete a Workflow from the Library



Workflows Added to the New Menu

As you create new workflows for your users, they are added to the main **New** menu in GIFTS Alta.

Example: If you create new workflows for creating External Reviewers and Internal Staff, when users click on **New > Contact** they will be presented with a submenu of workflows similar to the one shown below.

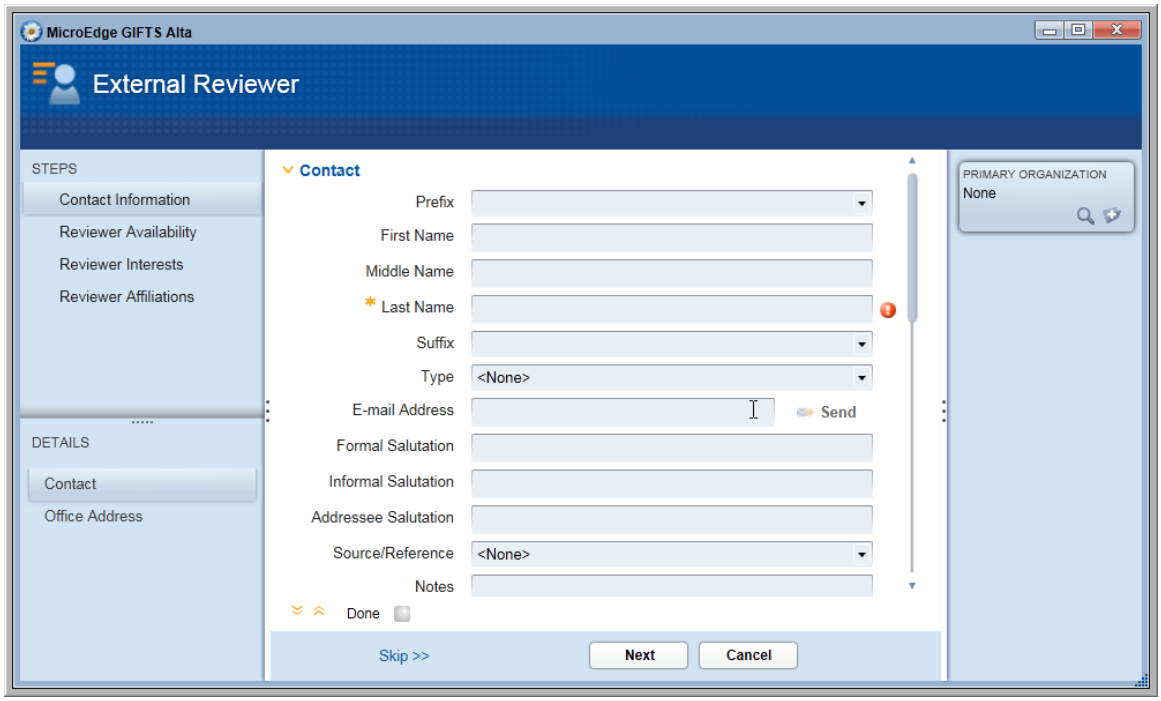


Using a Workflow

To access a specific workflow, the user would go to the main New menu and click on the desired record type. A submenu will be displayed allowing the user to pick the correct workflow for their needs.

The Workflow provides an alternative to the standard data entry form(s) by breaking up the data entry process into a checklist or series of manageable steps to guide the user through making the appropriate actions. The steps will take advantage of your ability to create custom forms so that users will not be asked to see or interact with options or prompts that are not relevant to their tasks.

In the example below, the user needs to create a new contact for an external reviewer.



Left Panel

The left panel functions as both a checklist and a navigation tool.

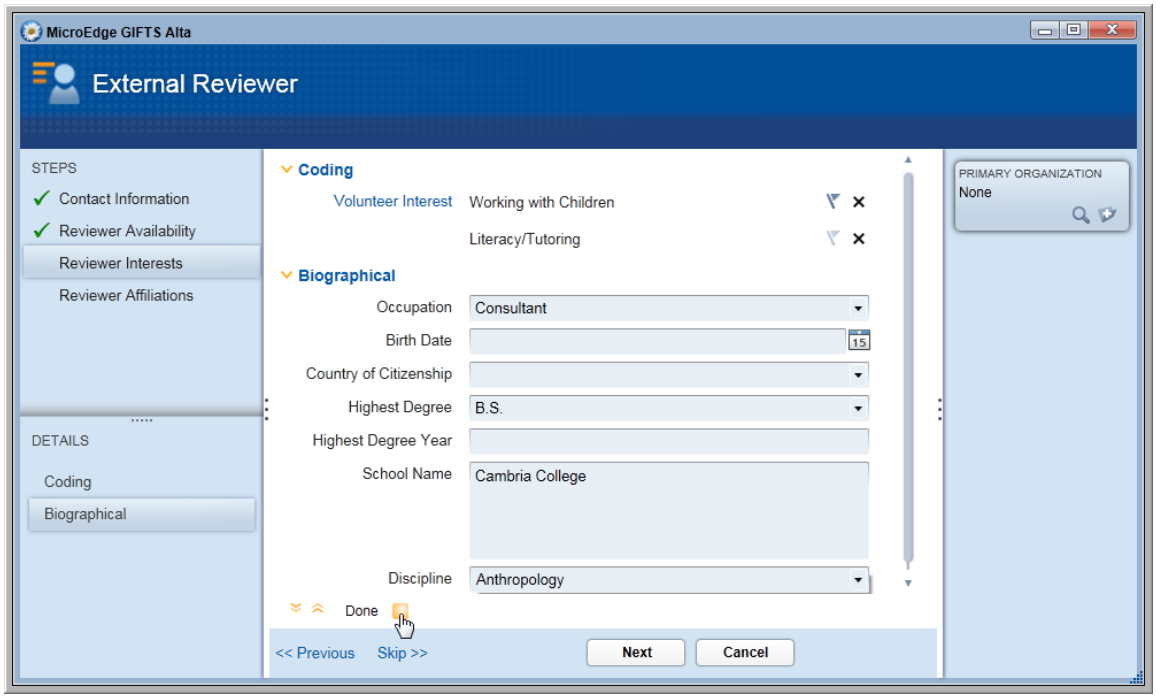
The names of the steps are listed in the order that they have been specified in the Workflow setup.

Clicking on the name of a step will open the form for that step.

NOTE: Users can also navigate through the steps by using the **Next** and **Back** buttons on the form.

The user can complete the steps of the workflow in any order that they choose. As each step is marked **Done**, a checkmark is displayed next to the task.

NOTE: Certain steps such as Affiliations require the user to fill out the rest of the form and save first. If necessary, the system will prompt the user to do so.



Right Panel

The right panel displays the form that the user is currently filling out. System required fields will be enforced and the current form will need to be saved before the user can move on to a different form.

Navigation Options

The buttons on the bottom of the forms in Workflow allow the user to do the following:

- **Previous** (link) – goes to the previous step. If the current step has unsaved changes, the user is prompted to save them or discard them. Hidden for the first step.
- **Skip** (link) – skips ahead to the next step without saving changes. If the user has made changes, they'll be warned that their changes will be lost.
- **Save and Next** (button) – saves changes and goes to the next step. Replaced with 'Save and finish' on the last step. For more information, see the section on finishing the workflow.
- **Save** (button) – saves the changes to the current step without leaving the step.
- **Cancel** (button) – warns the user that their changes to the current step will be lost, and then closes the Workflow.

Completing the Workflow

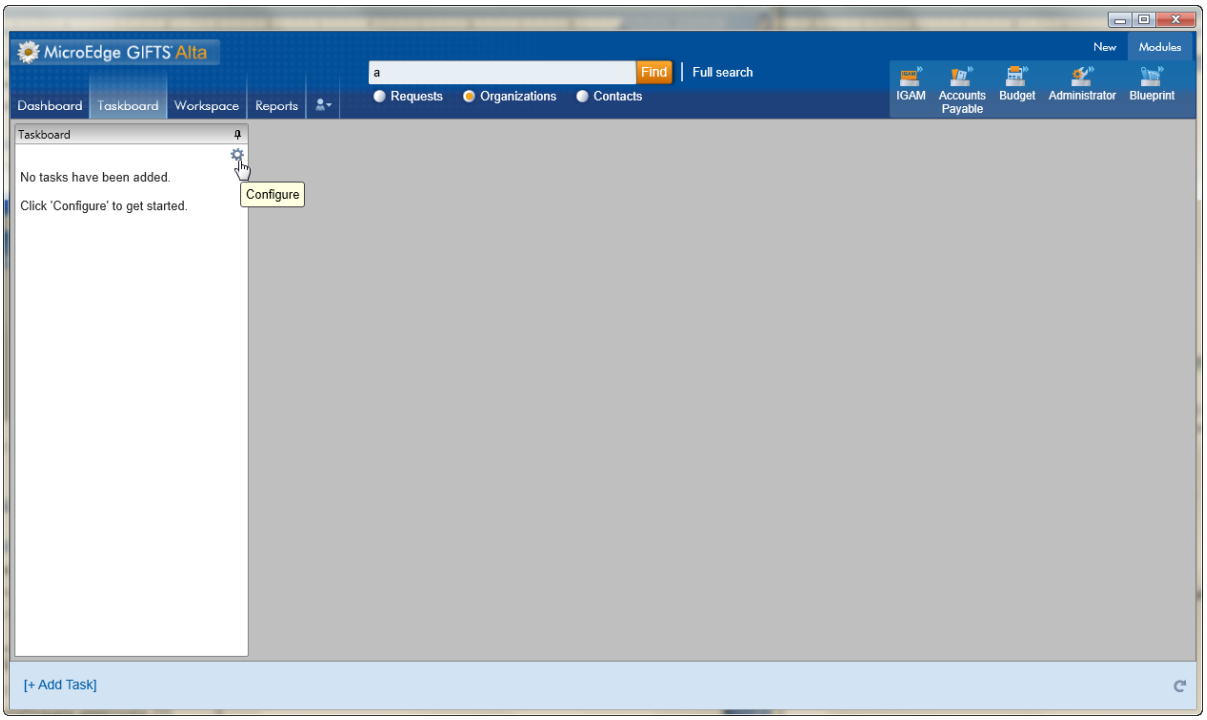
Each step will include a **Done** checkbox for the user to confirm that all information required has been entered. A check will appear in the checklist next to each step marked as Done. The final form in the process will have a **Save and Finish** button to complete the process.

If any tasks are incomplete, the system will prompt the user accordingly.

Taskboard

The Taskboard enhances the user experience by providing a more focused view of tasks to be completed. Users can choose to make the Taskboard the focus of their activity in GIFTS Alta while still using the Dashboard as needed.

The Taskboard will display a list of tasks, each associated with the record count of the items currently waiting to be addressed.

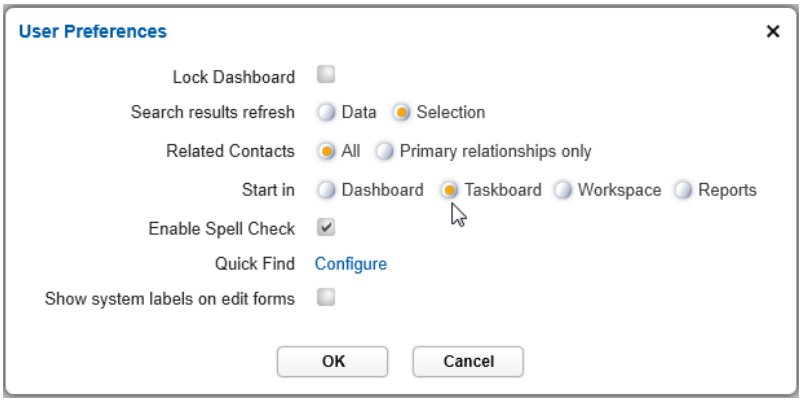


The user can display those items and perform batch actions, or open the records individually.

Rather than open just a single data entry form, the record will open as a Workflow. (See *Workflow* section for more details.)

Setting Taskboard in User Preferences

The User Preferences form has been updated with a **Taskboard** option for the **Start in** setting.



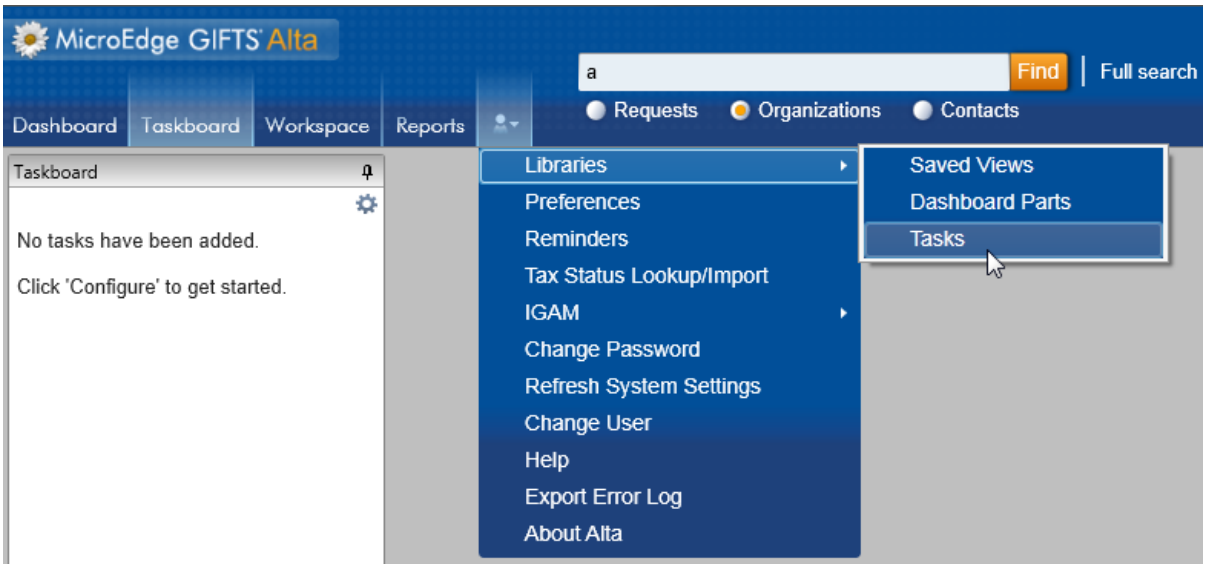
If selected, this setting will cause the Taskboard to be displayed first when the user logs in.

Taskboard Tab

A new **Taskboard** tab has also been added between Dashboard and Workspace in the upper left menu.

Tasks in User Libraries

In the User menu, a **Tasks** option will also be available in the Libraries menu.



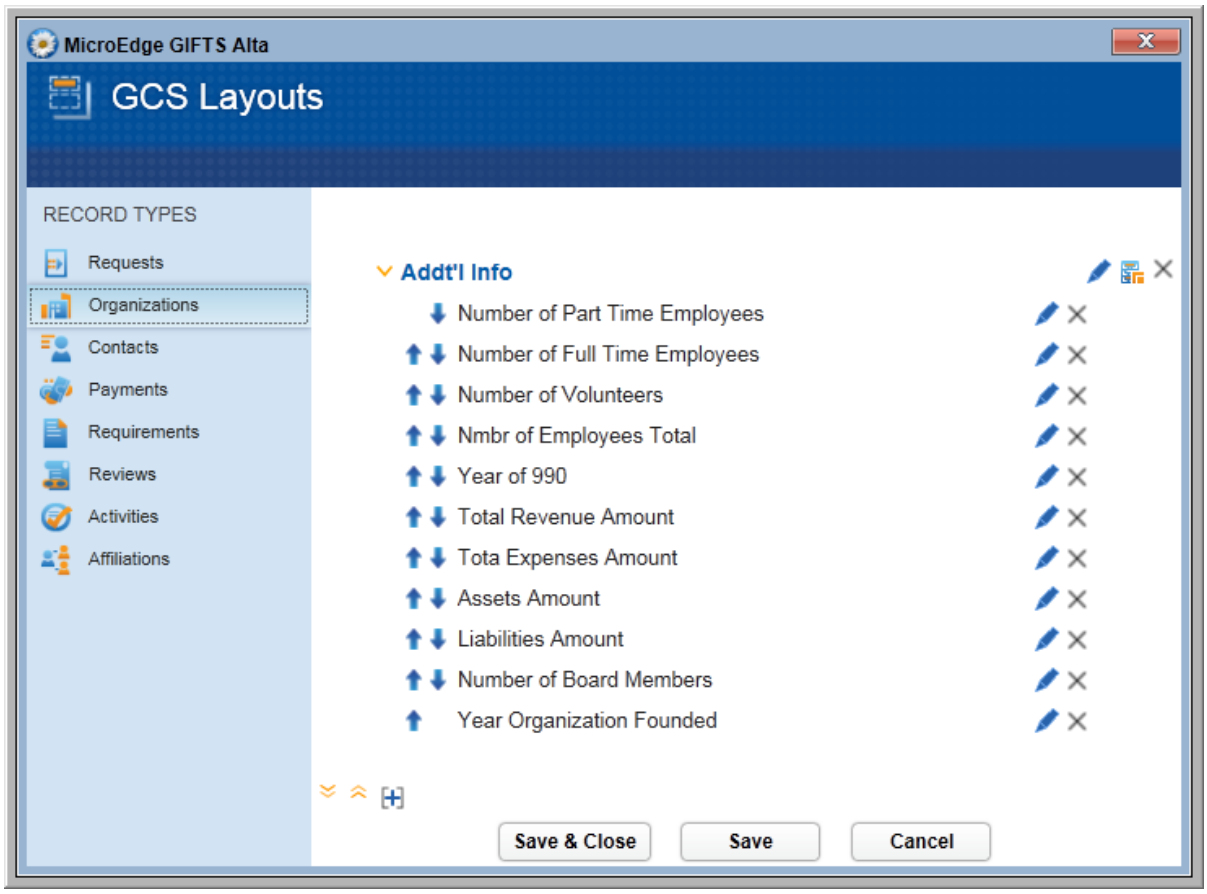
GCS Layout

NOTE: This option is only visible to ReviewerCONNECT and MyGIFTS users.

This tool allows you to manage custom fields and sections displayed in ReviewerCONNECT and MyGIFTS sites.

TIP: If you frequently use the default system form as a basis for creating new custom forms in Blueprint, it must be noted that any changes made via GCS Layout also alters the default system form for the specific record type.

When GCS Layouts will look similar to the example below:



On the left panel, a record type can be selected.

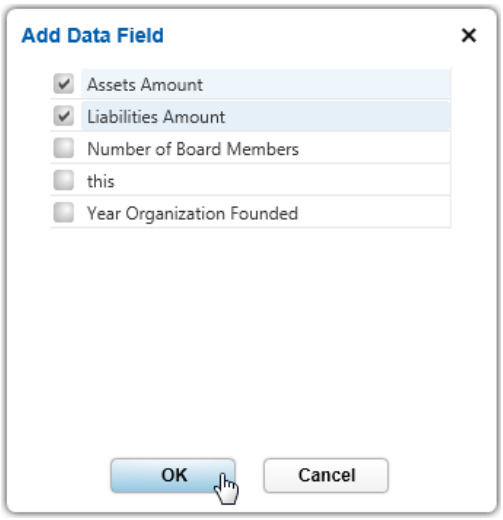
Editing Sections

- Existing section headings will have a yellow Expand/Collapse arrow next to it.
- The section label can be edited by clicking the pencil icon to the right (Edit Section Properties).
- The Add Fields icon will let you add additional fields to the specific section.
- Clicking the X will remove the section and any fields it contains.
- In the lower left, double arrows let you Expand or Collapse All sections.
- Clicking the [+] link will add a new section.

Adding Fields

To add a field, click the **Add Field** icon to the right of the section title.

The Add Data Field form will be displayed with any custom fields available for adding to the section.



Simply check the ones you want to add and click **OK**.

Remember to **Save** your changes.

Re-Sorting Fields

Fields can be resorted by clicking on the Up/Down arrows to them.

Editing Field Labels

To edit a field label, click the Edit (pencil icon) next to it.

Change the Label text field as desired.

If you do not wish to have the label displayed, uncheck the **Label is Visible** box.

Click **OK** when done.

Removing Fields

To delete a field, simply click the **X** icon to the right of the field.

NOTE: There is no confirmation prompt. The field is automatically deleted.

Be sure to double check your deletions before saving.

Permissions for Blueprint

Several permissions are available in the Administrator module (Grant Group Permissions icon) for controlling access to Blueprint features.

GIFTS Permissions

In the GIFTS section, two permissions limit access to Dashboards and Taskboard configuration settings.

Set Up Dashboard Parts

Only the **Execute** permission can be modified for this setting.

This Execute permission defaults to *false* except for the 'Admin' group.

Only when Execute is set to *true* can a user:

- See and select the User Menu item **Libraries > Dashboard Parts**.
- See and click the **[+ Add Part]** link at the foot of the dashboard.
- See and click the **Configure** gear icon for any dashboard part.

Set Up Taskboard

This setting limits access to the Configuration options of each task.

Only the **Execute** permission can be modified for this setting.

This Execute permission will default to *false* except in the 'Admin' Group Permissions set. Only when Execute is set to *true* can a user see and select the **Configuration** link on the Tasks.

Blueprint Permissions

Clients with Blueprint installed will also have a new Blueprint section at the bottom of the list:

Permission	Controls…
Login (Execute)	If true, the users in the group to which the permission is assigned can see the Blueprint icon in the Alta Modules ribbon menu. (Otherwise, the user cannot log in and access Blueprint at all.) It's a quick way to turn off permissions to Blueprint when needed. **NOTE:** When toggled from true to false, the permission set's other Blueprint settings will remain the same, so they can be quickly turned back on later if need be. **NOTE:** Defaults to true for the Admin group. All others are set to false.
Custom Fields (**View**, Add, Update, Delete)	If Login-Execute permission is granted, users with these permissions can always view the Custom Fields list. **View** is selected and cannot be edited. **Add, Update, and Delete** permissions determine whether the user can add, updated, or delete custom fields, calculations, and URLs.

Fields Library (**View**, Update)	If Login-Execute permission is granted, users with these permissions can always view the Fields Library. **View** is selected and cannot be edited. **Update** permission determines whether the user can edit custom label sets, hide/make required fields, add tool tips, etc.
Forms (**View**, Add, Update, Delete)	If Login-Execute permission is granted, users with these permissions can always view the Forms Library. **View** is selected and cannot be edited. **Add, Update, and Delete** permissions determine whether the user can add, update, or delete custom forms. **NOTE:** Update permission also determines whether the user can assign forms or activate/deactivate forms.
Task Library (**View**, Add, Update, Delete)	If Login-Execute permission is granted, users with these permissions can always view the Task Library. **View** is selected and cannot be edited. **Add, Update, and Delete** permissions determine whether the user can add, update, or delete tasks. This includes the ability to add, update or remove them from other users' taskboards.
Workflow Library (**View**, Add, Update, Delete)	If Login-Execute permission is granted, users with these permissions can always view the Workflow Library. **View** is selected and cannot be edited. **Add, Update, and Delete** permissions determine whether the user can add, update, or delete workflows.